



Traded Business Clusters Study Charlotte, Collier, and Lee Counties 2006 Update



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**Traded Business Cluster Study
Charlotte, Collier, and Lee Counties**

PREFACE

**Traded Business Cluster Study
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This document represents an important update to an earlier traded cluster study that provided available regional cluster information for the years 2001 and 2004. New data is now available for 2006 and this update provides a summary of the cluster analysis using 2006 employment, average wage, and number of establishments by cluster definition. This is a continuing regional collaboration between the University and the Economic Development Organizations in Charlotte, Lee, and Collier Counties.

Industry Clusters are geographic concentrations of business suppliers, producers, service providers, and associated institutions that increase productivity and give a competitive advantage to the firms and the overall business or cluster. This research study focuses on traded industry clusters in the Southwest Florida region.

The project was conducted by Florida Gulf Coast University's Regional Economic Research Institute (RERI) with support from the regional economic development organizations. This is a continuing part of our mission to improve the overall understanding of the regional economy.

Dr. Gary Jackson

Director
Regional Economic Research Institute
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Florida Gulf Coast University

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EXECUTIVE SUMMARY

This study is the result of collaboration between Florida Gulf Coast University's Regional Economic Research Institute (RERI) and the economic development organizations in Charlotte, Collier, and Lee Counties. A previous cluster analysis, "Traded Business Clusters, Charlotte, Collier, and Lee Counties," was completed in June of 2006 using 2004 labor data. This study updates the previous cluster analysis by:

- Using the 2006 annual labor data from Bureau of Labor Statistics and Florida's Agency for Workforce Innovation;
- Replaces the medical device manufacturing cluster with a broader life sciences cluster; and
- Reports on the number of establishments as well as average annual wage, employment, and location quotients (LQ).

The 2006 cluster analysis was completed for Charlotte, Collier, and Lee Counties for ten specific clusters of interest (regional LQ shown in parentheses):

1. Entertainment Services	(2.69)
2. Visitor Services (Hospitality and Tourism)	(2.33)
3. Building Component Manufacturing	(1.31)
4. Life Sciences	(1.24)
5. Business Services	(1.16)
6. Printing and Publishing	(0.90)
7. Financial Services	(0.86)
8. Transportation and Warehousing	(0.83)
9. Wholesale Distribution Services (Durable Goods)	(0.81)
10. Software and Computer Services	(0.54)

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The location quotient is the percent of employment in the regional cluster relative the percent employment in the same cluster for the nation. A high LQ represents a high concentration of employment in that regional cluster.

Michael Porter of the Harvard Business School and the *Institute for Strategy and Competitiveness* has studied industry clusters and competition for a number of years and is a well-known expert in the field of cluster analysis. Porter's website, www.isc.hbs.edu, provides a good definition and overview of industry clusters:

- *“Clusters are geographic concentrations of interconnected companies, specialized suppliers, service providers, and associated institutions in a particular field that are present in a nation or region.”*
- *“Clusters arise because they increase the productivity with which companies compete.”*
- *“The development and upgrading of clusters is an important agenda for governments, companies, and other institutions. Cluster development initiatives are an important new direction in economic policy, building on earlier efforts in macroeconomic stabilization, privatization, market opening, and reducing the costs of doing business.”*

It is hoped that this research will provide a better understanding of the existing industries and clusters and assist economic development organizations and policymakers in their efforts to target certain industries and industry clusters.

The Southwest Florida coastal counties and the region have a large percentage of employment in entertainment and visitor services clusters, as shown in the following tables. The entertainment cluster has a location quotient well over 1.0 for each of the counties and for the region. This indicates a much higher percentage of employment in this regional cluster than the average for the

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nation as a whole. The region’s beaches, mild weather, recreational opportunities and other amenities provide the region with a competitive advantage in these clusters. The entertainment cluster location quotient for the region was 2.69, employment was 13,084, average annual wage was \$31,507, and there were 675 establishments in the cluster.

Entertainment				
County	2006 LQ	2006 Employment	2006 Average Annual Wage	2006 Number of Establishments
Charlotte	1.86	949	\$18,652	64
Collier	3.77	5,629	\$35,796	249
Lee	1.87	6,506	\$29,671	362
Region	2.69	13,084	\$31,507	675

The visitor services cluster also had a high location quotient (LQ) of 2.33 indicating a large percentage of employment in this cluster relative to the percentage of employment for the nation on average. The regional employment in 2006 was 25,379 with an average annual wage of \$29,487. The three coastal counties had 1,123 establishments in the visitors services cluster.

Visitor Services				
County	2006 LQ	2006 Employment	2006 Average Annual Wage	2006 Number of Establishments
Charlotte	1.44	1,422	\$19,260	121
Collier	3.17	11,922	\$32,136	389
Lee	1.60	12,035	\$28,072	613
Region	2.33	25,379	\$29,487	1,123

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The building component manufacturing sector had the next highest location quotient with 1.31. Employment was 7,496 with an average annual wage of \$39,866 and the research identified 416 regional establishments. This cluster has been supporting the area's building sector which currently is going through a major correction as the national economy has slowed considerably in 2008.

Building Component Manufacturing				
County	2006 LQ	2006 Employment	2006 Average Annual Wage	2006 Number of Establishments
Charlotte	NA	544	\$40,941	44
Collier	0.94	1,993	\$38,815	135
Lee	1.46	4,959	\$40,170	237
Region	1.31	7,496	\$39,866	416

The life sciences cluster includes patient services, manufacturing, and research. Additional detailed information on the sector is included in the main body of the paper. Life sciences are a key cluster for the region with an average location quotient of 1.24 and 2006 employment of more than 26,462. The confidentiality requirements placed on the release of data requires that Lee Memorial Health System workforce numbers be kept confidential and are not included in the total for Lee County. The Lee Memorial Health System website reports that they have over 9,000 employees which would bring the Lee County employment total to about 20,000 and the region to almost 35,000 employees.

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The 2006 average annual wage for life sciences is \$53,455 and there were 2,179 establishments identified in this region's cluster.

Life Sciences				
County	2006 LQ	2006 Employment	2006 Average Annual Wage	2006 Number of Establishments
Charlotte	1.71	5,450	\$44,343	387
Collier	0.98	10,097	\$55,936	729
Lee	1.24	10,915	\$55,710	1,063
Region	1.24	26,462	\$53,455	2,179

The regional business services cluster has a 2006 location quotient of 1.16 indicating that employment was 16 percent higher than the national average for this cluster. There were 33,741 employees with an average annual wage of \$36,734 and 5,654 establishments.

Business Services				
County	2006 LQ	2006 Employment	2006 Average Annual Wage	2006 Number of Establishments
Charlotte	0.88	2,689	\$33,815	685
Collier	1.34	12,250	\$38,880	2,044
Lee	1.09	18,802	\$35,754	2,925
Region	1.16	33,741	\$36,734	5,654

The printing and publishing cluster had a location quotient slightly below 1.0 indicating that employment in this cluster was below the national average.

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This suggests that printing and publishing services are most likely being imported into the region. The employment in 2006 was 1,789 with an average annual wage of \$44,304 and 291 establishments.

Printing and Publishing				
County	2006 LQ	2006 Employment	2006 Average Annual Wage	2006 Number of Establishments
Charlotte	0.11	33	NA	17
Collier	0.60	864	\$49,471	106
Lee	1.21	892	\$39,300	168
Region	0.90	1,789	\$44,304	291

The financial services cluster had a location quotient of 0.86 which is below 1.0 or the national average. The 2006 employment level was 7,906 with an average annual wage of \$58,918 and 1,091 establishments. The study found that the average annual wage varied considerably between the various counties with Collier County having the highest average annual wage of \$76,775.

Financial Services				
County	2006 LQ	2006 Employment	2006 Average Annual Wage	2006 Number of Establishments
Charlotte	NA	890	\$43,501	115
Collier	0.93	2,709	\$76,775	328
Lee	0.81	4,307	\$50,873	648
Region	0.86	7,906	\$58,918	1,091

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The transportation and warehousing cluster had a location quotient of 0.83 and employment of 5,837. The 2006 average annual wage was \$52,269 and the study identified 725 establishments.

Transportation and Warehousing				
County	2006 LQ	2006 Employment	2006 Average Annual Wage	2006 Number of Establishments
Charlotte	0.56	341	\$39,947	78
Collier	0.59	1,417	\$61,196	229
Lee	0.93	4,079	\$50,198	418
Region	0.83	5,837	\$52,269	725

The wholesale (durable goods) distribution cluster had the next highest location quotient at 0.81. This indicates that the percent of employment in wholesale distribution was below the national average and that the region was likely importing some of the wholesale distribution services. Employment was 5,448 with an average annual wage of \$53,442 and 725 establishments.

Wholesale Distribution				
County	2006 LQ	2006 Employment	2006 Average Annual Wage	2006 Number of Establishments
Charlotte	0.56	341	\$41,007	78
Collier	0.62	1,417	\$62,364	229
Lee	0.90	3,690	\$51,165	418
Region	0.81	5,448	\$53,442	725

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An important cluster that is being recruited by the region is the software and computer services. The location quotient for the region is 0.54 which is relatively low indicating that many of these services are being imported into the region. There were 1,590 employees with a relatively high average annual wage of \$67,015 and 407 establishments.

Software and Computer Services				
County	2006 LQ	2006 Employment	2006 Average Annual Wage	2006 Number of Establishments
Charlotte	0.15	75	\$38,735	39
Collier	0.59	629	\$86,130	149
Lee	0.53	886	\$55,838	219
Region	0.54	1,590	\$67,015	407

This study is an update of a previous study completed in June of 2006. It provides key data to provide a better understanding of employment and annual wages in the region and by county. The data show that the region has strong clusters in entertainment services, and visitor services. The life sciences cluster is strong in patient services but there is a desire to expand the life sciences into additional manufacturing and research. The business services cluster continues to be a key employer in the region. Opportunities exist to diversify the economy and to expand high wage employment in areas such as life sciences and software and computer services. Detailed tables and descriptions of the study are provided in the main body as well as the appendix of this report.

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Introduction

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The 2006 cluster analysis was completed for Charlotte, Collier, and Lee Counties for ten specific clusters of interest:

1. Building Component Manufacturing
2. Business Services
3. Wholesale Distribution Services (Durable Goods)
4. Entertainment Services
5. Financial Services
6. Life Sciences
7. Printing and Publishing
8. Software and Computer Services
9. Transportation and Warehousing
10. Visitor Services (Hospitality and Tourism)

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Michael Porter of the Harvard Business School and the *Institute for Strategy and Competitiveness* has studied industry clusters and competition for a number of years and is a well known expert in the field of cluster analysis. Porter's website, www.isc.hbs.edu, provides a good definition and overview of industry clusters:

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It is hoped that this research will provide a better understanding of the existing industries and clusters and assist economic development organizations and policymakers in their efforts to target certain industries and industry clusters.

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Methodology

The study is based on 2006 labor data obtained from the U.S. Bureau of Labor Statistics and Florida’s Agency for Workforce Innovation. The summary statistics are based on available information that may be limited due to non-disclosure requirements. The cluster definitions are based on the work done in the original study and are not repeated in this update study. The life sciences cluster definition includes manufacturing, research and development, and patient services. The North American Industry Classification Codes (NAICS) that define each cluster are contained in the detailed summary tables.

The location quotient (LQ) is defined as:

$$\frac{(\textit{Local employment in the cluster} / \textit{Total local employment})}{(\textit{National employment in the cluster} / \textit{Total National employment})}$$

If a cluster has a higher percentage of employment in the local economy than the nation, the LQ is greater than one; it is likely to be exporting the product or service outside the local economy. If the LQ is less than one, it is likely that the local economy will be importing some of the good or service.

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Study Findings

The 2006 cluster information is first presented at a summary level that compares the labor data for all ten clusters by location quotient and average annual wage. Next, the detailed information is presented for three key clusters of interest including:

- Life Sciences;
- Computer and Software Design; and
- Wholesale Distribution

In order to keep the study report manageable, the detailed analysis charts for the other clusters are provided in Appendix A which includes 21 detailed cluster tables for the remaining seven clusters and the three counties. The definitions of the clusters are contained in the detail cluster tables and are defined using the North American Industry Classification System or NAICS. The summary level cluster information is presented in six tables sorted by location quotient and average annual wage and by each county.

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The Charlotte County information is presented in the following two tables.

Charlotte County has a location quotient above one for the following clusters:

- Entertainment with a LQ of 1.86;
- Life Sciences with a LQ of 1.71; and
- Visitor Services with a LQ of 1.44.

The high values for Entertainment and Visitor services indicate that Charlotte County has a higher percentage of its employment in recreational activities such as golf courses, water-front activities, other amusement and recreational activities, accommodations, and food services. Given the climate, recreational activities, and beaches, it is not surprising that Charlotte County and the region have a competitive advantage in visitor services. Life Sciences had the second highest cluster location quotient of 1.73 with a majority of the life sciences cluster employment in patient services and some employment in medical equipment and supplies manufacturing. The strong location indicator for life sciences reflects the higher regional demand for health care services primarily due to the high percentage of retirees and seasonal visitors to the region.

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The remaining Charlotte County clusters did not have sufficient employment relative to the nation to have a location quotient above one. These included:

- Business Services (LQ of 0.88);
- Transportation and Warehousing (LQ of 0.56);
- Wholesale (Durable Goods) Distribution Services (LQ of 0.56);
- Software and Computer Services (LQ of 0.15);
- Printing and Publishing (LQ of 0.11);
- Financial Services with a LQ that could not be disclosed due to confidentiality requirements but the labor data identified 115 establishments; and
- Building Component Manufacturing with a LQ that could not be disclosed due to confidentiality requirements but the labor data identified 44 establishments.

Table 3.11

Charlotte County 2006 Data Sorted by Location Quotient					
NO.	Cluster	Location Quotient	Employment	Average Annual Wage	Number of Establish- ments
1	Entertainment	1.86	949	\$18,652	64
2	Life Sciences	1.71	5,450	\$44,343	387
3	Visitor Services	1.44	1,422	\$19,260	121
4	Business Services	0.88	2,689	\$33,815	685
5	Transportation and Warehousing	0.56	341	\$39,947	78
6	Wholesale Distribution (Durable Goods)	0.56	341	\$41,007	78
7	Software and Computer Services	0.15	75	\$38,735	39
8	Printing and Publishing	0.11	33	NA	17
9	Financial Services	NA	890	\$43,501	115
10	Building Component Manufacturing	NA	544	\$40,941	44

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Charlotte County's clusters were also sorted by average annual wage. Life Sciences had the highest average annual wage in 2006 with \$44,343, followed by Financial Services at \$43,501 and Wholesale Services at \$41,007. The Building Component Manufacturing, Transportation and Warehousing, Software and Computer Services, and Business Services clusters had average annual wages between \$33,815 and \$40,941. The lowest average annual wages were for the Visitor Services and Entertainment clusters at \$19,260 and \$18,652, respectively.

Table 3.12

Charlotte County 2006 Cluster Data Sorted by Average Annual Wage					
NO.	Cluster	Location Quotient	Employment	Average Annual Wage	Number of Establishments
1	Life Sciences	1.71	5,450	\$44,343	387
2	Financial Services	NA	890	\$43,501	115
3	Wholesale Distribution (Durable Goods)	0.56	341	\$41,007	78
4	Building Component Manufacturing	NA	544	\$40,941	44
5	Transportation and Warehousing	0.56	341	\$39,947	78
6	Software and Computer Services	0.15	75	\$38,735	39
7	Business Services	0.88	2,689	\$33,815	685
8	Visitor Services	1.44	1,422	\$19,260	121
9	Entertainment	1.86	949	\$18,652	64
10	Printing and Publishing	0.11	33	NA	17

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The 2006 Collier County cluster data are presented in the next two tables. There are three clusters that had a location quotient above one:

- Entertainment (LQ of 3.77);
- Visitor Services (LQ of 3.17); and
- Business Services (LQ of 1.34).

Entertainment and Visitor Services had very high location quotients indicating the proportionally high levels of employment in these clusters relative to the nation. This reflects Collier County's relative competitive advantage in providing these services. Business Services was the only other cluster analyzed that had a location quotient above one at 1.34 implying that, relative to the nation, employment was relatively high.

Life Sciences, Building Component Manufacturing, and Financial Services had location quotients between 0.93 and 0.98 which implies that local employment is close to the national percentage of employment in those clusters. Wholesale Services, Printing and Publishing, Software and Computer Services, and Transportation and Warehousing Clusters had location quotients between 0.59 and 0.62 indicating that Collier County was most likely importing some of these services.

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Table 3.13

Collier County 2006 Cluster Data Sorted by Location Quotient					
NO.	Cluster	Location Quotient	Employment	Average Annual Wage	Number of Establish- ments
1	Entertainment	3.77	5,629	\$35,796	249
2	Visitor Services	3.17	11,922	\$32,136	389
3	Business Services	1.34	12,250	\$38,880	2,044
4	Life Sciences	0.98	10,097	\$55,936	729
5	Building Component Manufacturing	0.94	1,993	\$38,815	135
6	Financial Services	0.93	2,709	\$76,775	328
7	Wholesale Distribution (Durable Goods)	0.62	1,417	\$62,364	229
8	Printing and Publishing	0.60	864	\$49,471	106
9	Software and Computer Services	0.59	629	\$86,130	149
10	Transportation and Warehousing	0.59	1,417	\$61,196	229

Collier County's clusters are also sorted by average annual wage. The highest 2006 average wage was for the Software and Computer Services cluster at \$86,130. This was followed by Financial Services at \$76,775 and Wholesale Distribution Services at \$62,364. Transportation and Warehousing and Life Sciences had relatively high average annual wages of \$61,196 and \$55,936, respectively. Printing and Publishing, Business Services, and Building Component Manufacturing had average annual wages between \$38,880 and \$49,471. The lowest average annual wages were for employees in the Entertainment and Visitor Services Clusters with \$35,796 and \$32,136, respectively.

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Table 3.14

Collier County 2006 Cluster Data Sorted by Average Annual Wage					
NO.	Cluster	Location Quotient	Employment	Average Annual Wage	Number of Establishments
1	Software and Computer Services	0.59	629	\$86,130	149
2	Financial Services	0.93	2,709	\$76,775	328
3	Wholesale Distribution (Durable Goods)	0.62	1,417	\$62,364	229
4	Transportation and Warehousing	0.59	1,417	\$61,196	229
5	Life Sciences	0.98	10,097	\$55,936	729
6	Printing and Publishing	0.6	864	\$49,471	106
7	Business Services	1.34	12,250	\$38,880	2,044
8	Building Component Manufacturing	0.94	1,993	\$38,815	135
9	Entertainment	3.77	5,629	\$35,796	249
10	Visitor Services	3.17	11,922	\$32,136	389

Lee County had six clusters with a location quotient above one:

- Entertainment (LQ of 1.87);
- Visitor Services (LQ of 1.60);
- Building Component Manufacturing (LQ 1.46);
- Life Sciences (LQ of 1.29);
- Printing and Publishing (LQ of 1.21); and
- Business Services (LQ of 1.09).

Each of these clusters has employment proportionally above the national level and is likely to be exporting some of these products and services outside Lee County.

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Table 3.15

Lee County 2006 Cluster Data Sorted by Location Quotient					
NO.	Cluster	Location Quotient	Employment	Average Annual Wage	Number of Establish- ments
1	Entertainment	1.87	6,506	\$29,671	362
2	Visitor Services	1.60	12,035	\$28,072	613
3	Building Component Manufacturing	1.46	4,959	\$40,170	237
4	Life Sciences	1.24	10,915	\$55,710	1,063
5	Printing and Publishing	1.21	892	\$39,300	168
6	Business Services	1.09	18,802	\$35,754	2,925
7	Transportation and Warehousing	0.93	4,079	\$50,198	418
8	Wholesale Distribution (Durable Goods)	0.90	3,690	\$51,165	418
9	Financial Services	0.81	4,307	\$50,873	648
10	Software and Computer Services	0.53	886	\$55,838	219

The two highest average annual wage clusters for Lee County are Software and Computer Services at \$55,838 and Life Sciences at \$55,710. Wholesale Distribution, Financial Services, and Transportation and Warehousing had average annual wages between \$50,198 and \$51,165. Building Component Manufacturing, Printing and Publishing, and Business Services had average annual wages between \$35,754 and \$40,170. The lowest average annual wage was reported for Entertainment and Visitor Services with \$29,671 and \$28,072, respectively.

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Table 3.16

Lee County 2006 Cluster Data Sorted by Average Annual Wage					
NO.	Cluster	Location Quotient	Employment	Average Annual Wage	Number of Establish- ments
1	Software and Computer Services	0.53	886	\$55,838	219
2	Life Sciences	1.24	10,915	\$55,710	1,063
3	Wholesale (Durable Goods)	0.90	3,690	\$51,165	418
4	Financial Services	0.81	4,307	\$50,873	648
5	Transportation and Warehousing	0.93	4,079	\$50,198	418
6	Building Component Manufacturing	1.46	4,959	\$40,170	237
7	Printing and Publishing	1.21	892	\$39,300	168
8	Business Services	1.09	18,802	\$35,754	2,925
9	Entertainment	1.87	6,506	\$29,671	362
10	Visitor Services	1.60	12,035	\$28,072	613

Although detailed information is available for ten regional clusters, this study focuses on:

- Software and Computer Services;
- Life Sciences; and
- Wholesale Distribution Services.

Detailed information for the other seven clusters is available in Appendix A.

The software and computer services detailed cluster data are shown in Tables 3.17 through 3.19. Charlotte County has 39 establishments with more than 75 employees primarily employed in customer computer programming and computer systems design services with an average annual wage of approximately \$39,000. The cluster has a very small location quotient of 0.15 indicating that a large percentage of software and computer services are imported from outside the county. The 2006 average annual wage for Charlotte County was \$38,735.

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Table 3.17

Charlotte County Software and Computer Services Cluster Data							
Sub-cluster	NAICS Code	2001 Employment Location Quotient	2006 Employment Location Quotient	2001 to 2006 Change in Employment Location Quotient	2006 Employment	2006 Average Annual Wage	2006 Number of Establish- ments
Custom computer programming services	541511	0.18	0.16	-0.02	30	\$18,495	11
Software publishers	511210	NC	ND	-	ND	ND	2
Computer systems design services	541512	ND	0.13	-	24	\$52,650	13
Data processing and related services	518210	ND	ND	-	ND	ND	4
Internet service providers	518111	ND		-	4	\$22,794	3
Computer facilities management services	541513	NC	NC	-	NC	NC	0
Other computer related services	541519	ND	0.28	-	10	\$37,324	6
		-		-	-	-	
		-		-	-	-	
		-		-	-	-	
Total for Cluster		NA	0.15	-	75	\$38,735	39
RERI:FGCU: Source: BLS and AWI Data NC: Not Calculable (does not exist or zero); ND: Not Disclosable; NA: Not Applicable							

Collier County has over 600 employees in the Software and Computer Services Cluster and 149 establishments, as shown in Table 3.18. Most employees are in custom computer programming services, computer systems design services, and internet service providers. The cluster's 2006 location quotient was 0.59 which indicates that Collier County's employment is lower in percentage than that for the nation. The location quotient for customer computer programming services and computer system design services was 0.18 and 0.17 which are considered very low location quotients. Collier County had a location quotient of 0.98 for internet service providers which indicates that the county had

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about the same percentage of employees in the county as the average for the nation. This cluster is often considered a good candidate for diversifying the regional economy due to the high average annual wage, which was \$86,130 for Collier County.

Table 3.18

Collier County Software and Computer Services Cluster Data							
Sub-cluster	NAICS Code	2001 Employment Location Quotient	2006 Employment Location Quotient	2001 to 2006 Change in Employment Location Quotient	2006 Employment	2006 Average Annual Wage	2006 Number of Establishments
Custom computer programming services	541511	0.13	0.18	0.05	107	\$137,311	65
Software publishers	511210	ND	ND	-	ND	ND	6
Computer systems design services	541512	0.25	0.17	-0.08	103	\$61,217	52
Data processing and related services	518210	0.03	0.06	0.03	16	\$203,372	9
Internet service providers	518111	ND	0.98	-	108	\$52,830	7
Computer facilities management services	541513	ND	ND	-	ND	ND	0
Other computer related services	541519	ND	0.23	-	27	\$130,297	10
		-		-	-	-	
		-		-	-	-	
		-		-	-	-	
Total for Cluster		NA	0.59	NA	629	\$86,130	149

RERI:FGCU: Source: BLS and AWI Data **NC:** Not Calculable (does not exist or zero); **ND:** Not Disclosable; **NA:** Not Applicable

The software and computer services cluster for Lee County had 886 employees, 219 establishments, and an average annual wage of \$55,838 as shown in Table 3.19. The overall cluster location quotient was 0.53 which is driven by an average location quotient of 0.99 for internet service providers. The largest employment areas in the cluster were in custom computer programming

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services with 283 employees, computer systems design services with 153, internet service providers with 171 employees, and other computer related services with 93 employees. The county's employment levels in custom computer programming services and custom systems design services are well below the national average (proportional) employment for these sectors.

Table 3.19

Lee County Software and Computer Services Cluster Data							
Sub-cluster	NAICS Code	2001 Employment Location Quotient	2006 Employment Location Quotient	2001 to 2006 Change in Employment Location Quotient	2006 Employment	2006 Average Annual Wage	2006 Number of Establishments
Custom computer programming services	541511	0.26	0.30	0.04	283	\$55,488	91
Software publishers	511210	ND	ND	-	ND	ND	4
Computer systems design services	541512	0.17	0.16	-0.01	153	\$52,985	74
Data processing and related services	518210	ND	0.13	-	59	\$41,187	25
Internet service providers	518111	ND	0.99	-	171	ND	10
Computer facilities management services	541513	ND	ND	-	ND	ND	1
Other computer related services	541519	ND	0.52	-	93	\$72,729	14
		-		-	-	-	
		-		-	-	-	
		-		-	-	-	
Total for Cluster		NA	0.53	NA	886	\$55,838	219

RERI:FGCU: Source: BLS and AWI Data **NC:** Not Calculable (does not exist or zero); **ND:** Not Disclosable; **NA:** Not Applicable

Life Sciences are an area of interest for economic development, especially those fields engaged in research and development. Table 3.20 provides a

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summary of the life sciences cluster for Charlotte County which has 5,450 employees, 387 establishments, and an average annual wage of \$44,343. The location quotient is very high with a value of 1.71 which implies that employment in the county is 71 percent higher than the proportional cluster employment on average for the nation. Most of the employment is service-based. The labor data indicate that county has very low employment in life science manufacturing, research, and development.

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Table 3.20

Charlotte County Life Sciences Cluster Data							
Sub-cluster	NAICS Code	2001 Employment Location Quotient	2006 Employment Location Quotient	2001 to 2006 Change in Employment Location Quotient	2006 Employment	2006 Average Annual Wage	2006 Number of Establish- ments
Electromedical and Electrotherapeutic apparatus manufacturing	334510	NC	ND	-	ND	ND	1
Irradiation apparatus manufacturing	334517	NC	NC	-	NC	-	0
Medical equipment and supplies manufacturing	3391	0.20	0.31	-	32	\$30,440	9
Research and development in biotechnology	541711	NC	NC	-	NC	-	0
Research and development in physical, engineering, and life sciences (except biotechnology)	541712	NC	NC	-	NC	-	0
Veterinary Services	54194	1.39	2.23	0.84	208	\$29,600	22
Offices of physicians	6211	2.06	2.07	0.01	1,482	\$63,479	202
Offices of dentists	6212	1.45	1.28	-0.17	336	\$54,331	44
Offices of other health practitioners	6213	1.63	1.52	-0.11	292	\$33,691	67
Outpatient care centers	6214	2.26	1.22	-1.04	201	ND	11
Medical and diagnostic laboratories	6215	ND	3.71	-	73	\$69,800	14
Home health care services	6216	1.9	1.41	-0.49	408	\$33,280	9
Other ambulatory health care services	6219	ND	ND	-	ND	ND	2
Hospitals	6220	2.08	1.66	-0.42	2,418	\$38,750	6
Total for Cluster		1.99	1.71	-0.28	5,450	\$44,343	387

RERI: Florida Gulf Coast University; Source: BLS and AWI Data NC: Not Calculable (does not exist or zero); ND: Not Disclosable; NA: Not Applicable

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Collier County has a strong life science service cluster that includes 10,097 employees, 729 establishments, and an average annual wage of \$55,936 as shown in Table 3.21. There are 22 establishments and 276 employees identified working in the medical equipment and supplies manufacturing industry. There were no firms identified in the NAICS industry categories for life science research and development.

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Table 3.21

Collier County Life Sciences Cluster Data							
Sub-cluster	NAICS Code	2001 Employment Location Quotient	2006 Employment Location Quotient	2001 to 2006 Change in Employment Location Quotient	2006 Employment	2006 Average Annual Wage	2006 Number of Establishments
Electromedical and Electrotherapeutic apparatus manufacturing	334510	NC	NC	-	NC	NC	0
Irradiation apparatus manufacturing	334517	NC	ND	-	ND	ND	1
Medical equipment and supplies manufacturing	3391	0.52	0.83	0.31	276	\$38,079	22
Research and development in biotechnology	541711	NC	NC	-	NC	NC	0
Research and development in physical, engineering, and life sciences (except biotechnology)	541712	NC	NC	-	NC	NC	0
Veterinary Services	54194	0.87	1.13	0.26	341	\$34,185	33
Offices of physicians	6211	0.92	1.07	0.15	2,500	\$77,465	294
Offices of dentists	6212	0.98	0.87	-0.11	738	\$54,464	130
Offices of other health practitioners	6213	1.44	0.82	-0.62	507	\$34,822	157
Outpatient care centers	6214	2.00	1.53	-0.47	819	\$42,840	30
Medical and diagnostic laboratories	6215	1.97	1.73	-0.24	379	\$46,265	25
Home health care services	6216	1.15	0.70	-0.45	655	\$32,971	23
Other ambulatory health care services	6219	0.23	0.03	-0.2	7	\$19,560	7
Hospitals	6220	ND	0.82	-	3,875	ND	7
Total for Cluster		1.23	0.98	-0.25	10,097	\$55,936	729

RERI: Florida Gulf Coast University; Source: BLS and AWI Data NC: Not Calculable (does not exist or zero); ND: Not Disclosable; NA: Not Applicable

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Lee County also had a strong life sciences service cluster with over 10,915 employees, 1,063 establishments, and an average annual wage of \$56,699, as shown in Table 3.22. The Lee County life science employment numbers shown in the table do not include Lee Memorial Health System's employment due to confidentiality rules. However, the Lee Memorial Health System's website reports that they have over 9,000 employees. This would increase Lee County's life science cluster employment to approximately 20,000. Life science and computer services are both expected to be very fast growth industries creating opportunities for economic development and higher wage employment in the region.

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Table 3.22

Lee County Life Sciences Cluster Data							
Sub-cluster	NAICS Code	2001 Employment Location Quotient	2006 Employment Location Quotient	2001 to 2006 Change in Employment Location Quotient	2006 Employment	2006 Average Annual Wage	2006 Number of Establish- ments
Electromedical and Electrotherapeutic apparatus manufacturing	334510	ND	NC	-	NC	NC	0
Irradiation apparatus manufacturing	334517	ND	NC	-	NC	NC	0
Medical equipment and supplies manufacturing	3391	1.39	0.29	-1.10	150	\$42,588	28
Research and development in biotechnology	541711	NC	NC	-	NC	NC	0
Research and development in physical, engineering, and life sciences (except biotechnology)	541712	NC	NC	-	NC	-	0
Veterinary Services	54194	1.37	1.22	-0.15	577	\$32,444	54
Offices of physicians	6211	1.91	1.53	-0.38	5,598	\$70,504	416
Offices of dentists	6212	1.08	0.89	-0.19	1,185	\$53,383	168
Offices of other health practitioners	6213	1.20	1.04	-0.16	1,019	\$35,953	261
Outpatient care centers	6214	0.56	0.69	0.13	576	\$46,453	38
Medical and diagnostic laboratories	6215	1.46	1.22	-0.24	421	\$43,887	36
Home health care services	6216	1.50	0.91	-0.59	1,350	\$31,170	47
Other ambulatory health care services	6219	0.45	0.11	-0.34	39	\$27,793	6
Hospitals	6220	0.29	ND	-	ND	ND	9
Total for Cluster		1.41	1.24	-0.17	10,915	\$56,699	1,063

RERI:Florida Gulf Coast University: Source: BLS and AWI Data NC: Not Calculable (does not exist or zero); ND: Not Disclosable; NA: Not Applicable

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Charlotte County's Wholesale Distribution (Durable Goods) Cluster had 341 employees, 78 establishments, and an average annual wage of \$41,007 as shown in Table 3.23. The 2006 location quotient was 0.56 rising from 0.43 in 2001. This shows that the Charlotte County's wholesale distribution cluster employment has grown faster than national employment but that employment in this cluster is a lower percentage of total Charlotte County employment than that of the nation. The majority of employment was in lumber and construction supply merchant wholesalers, electric goods merchant wholesalers, hardware and plumbing merchant wholesalers, and machinery and supply merchant wholesalers.

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Table 3.23

Charlotte County Wholesale Distribution (Durable Goods) Cluster Data							
Sub-cluster	NAICS Code	2001 Employment Location Quotient	2006 Employment Location Quotient	2001 to 2006 Change in Employment Location Quotient	2006 Employment	2006 Average Annual Wage	2006 Number of Establish- ments
Motor vehicle and parts merchant wholesalers	4231	0.32	0.17	-0.15	20	\$30,752	6
Furniture and furnishing merchant wholesalers	4232	0.21	0.44	0.23	17	\$27,575	6
Lumber and const. supply merchant wholesalers	4233	0.41	1.09	0.68	96	\$42,314	12
Commercial equip. merchant wholesalers	4234	0.16	0.08	-0.08	18	\$53,221	12
Metal and mineral merchant wholesalers	4235	0.17	0.16	-0.01	7	\$51,601	5
Electric goods merchant wholesalers	4236	0.23	0.28	0.05	32	\$56,975	9
Hardware and plumbing merchant wholesalers	4237	0.93	0.44	-0.49	37	\$34,467	5
Machinery and supply merchant wholesalers	4238	0.34	0.45	0.11	102	\$37,024	18
Misc. durable goods merchant wholesalers	4239	0.28	0.12	-0.16	12	\$53,598	5
Total for Cluster		0.43	0.56	0.13	341	\$41,007	78
RERI:Florida Gulf Coast University: Source: BLS and AWI Data NC: Not Calculable (does not exist or zero); ND: Not Disclosable; NA: Not Applicable							

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Collier County's Wholesale Distribution (Durable Goods) cluster has 1,417 employees, 229 establishments, and a relatively high average annual wage of \$62,364 and is shown in Table 3.24. The 2006 location quotient is 0.62 indicating that Collier County employment in the wholesale sector is only 62 percent of the national percentage of employment in this cluster. The major Collier County employers in this cluster are lumber and construction merchant wholesalers, commercial equipment wholesalers, electric goods merchant wholesalers, machinery and supply merchant wholesalers, and miscellaneous durable goods merchant wholesalers. The only one of these with a location quotient above one was the lumber and construction supply merchant wholesalers with a location quotient of 1.28. The fast pace of residential and commercial construction through 2005 created a strong demand for wholesale merchants to supply the local construction industry.

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Table 3.24

Collier County Wholesale Distribution (Durable Goods) Cluster Data							
Sub-cluster	NAICS Code	2001 Employment Location Quotient	2006 Employment Location Quotient	2001 to 2006 Change in Employment Location Quotient	2006 Employment	2006 Average Annual Wage	2006 Number of Establish- ments
Motor vehicle and parts merchant wholesalers	4231	0.25	0.15	-0.10	55	\$34,855	15
Furniture and furnishing merchant wholesalers	4232	0.15	0.32	0.17	40	\$32,975	14
Lumber and const. supply merchant wholesalers	4233	1.4	1.28	-0.12	367	\$44,994	38
Commercial equip. merchant wholesalers	4234	0.44	0.5	0.06	353	\$106,175	42
Metal and mineral merchant wholesalers	4235	0.17	0.22	0.05	31	\$53,375	12
Electric goods merchant wholesalers	4236	0.54	0.42	-0.12	159	\$64,933	21
Hardware and plumbing merchant wholesalers	4237	0.46	0.34	-0.12	93	\$45,000	16
Machinery and supply merchant wholesalers	4238	0.34	0.24	-0.10	179	\$47,660	38
Misc. durable goods merchant wholesalers	4239	0.58	0.45	-0.13	140	\$46,043	33
Total for Cluster		0.51	0.62	0.11	1,417	\$62,364	229
RERI:Florida Gulf Coast University: Source: BLS and AWI Data NC: Not Calculable (does not exist or zero); ND: Not Disclosable; NA: Not Applicable							

Lee County's Wholesale Distribution (Durable Goods) cluster employed 3,690, included 418 establishments, and had an average annual wage of \$51,165 as shown in Table 3.25. The location quotient was 0.90 which implies that employment as a percentage of total county employment is close to the percentage of employment for this cluster at the national level. The largest

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employers in the cluster were lumber and construction supply merchant wholesalers, commercial equipment merchant wholesalers, electric goods merchant wholesalers, and machinery and supply merchant wholesalers.

Table 3.25

Lee County Wholesale Distribution (Durable Goods) Cluster Data							
Sub-cluster	NAICS Code	2001 Employment Location Quotient	2006 Employment Location Quotient	2001 to 2006 Change in Employment Location Quotient	2006 Employment	2006 Average Annual Wage	2006 Number of Establishments
Motor vehicle and parts merchant wholesalers	4231	0.45	0.41	-0.04	244	\$53,210	33
Furniture and furnishing merchant wholesalers	4232	0.52	1.15	0.63	225	\$45,340	25
Lumber and const. supply merchant wholesalers	4233	1.14	1.29	0.15	583	\$47,338	50
Commercial equip. merchant wholesalers	4234	0.48	0.46	-0.02	512	\$57,422	74
Metal and mineral merchant wholesalers	4235	0.42	0.46	0.04	101	\$39,060	11
Electric goods merchant wholesalers	4236	0.91	0.88	-0.03	516	\$62,954	57
Hardware and plumbing merchant wholesalers	4237	0.6	0.74	0.14	318	\$49,666	40
Machinery and supply merchant wholesalers	4238	1.12	1.10	-0.02	1,269	\$50,622	83
Misc. durable goods merchant wholesalers	4239	0.67	0.63	-0.04	311	\$38,774	45
Total for Cluster		0.85	0.90	0.05	3,690	\$51,165	418
RERI: Florida Gulf Coast University; Source: BLS and AWI Data NC : Not Calculable (does not exist or zero); ND : Not Disclosable; NA : Not Applicable							

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2.0 Concluding Thoughts

This study has updated numerous tables with information from the U.S. Bureau of Labor Statistics and Florida's Agency for Workforce Innovation to provide the best available data on ten various clusters by county. The level of detail has resulted in 36 detailed tables that are presented in this paper. It is clear from the research that the entertainment, visitor services, and life sciences patient service are large employers in our regional economy. The work done on software and computer design services, life sciences research and development activities, and wholesale distribution services reveal that these sectors are fairly small employers relative to the average percentage of employment at the national level. Software and computer design services and life sciences are expected to be two of the fastest growing clusters, creating opportunities for the region to expand its workforce in these clusters, and to diversify the overall regional economy with higher annual wage jobs, creating wealth for the region.

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Appendix A

Detailed Cluster Study Tables

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Table 3.26-1

Charlotte County Building Component Manufacturing Cluster Data							
Sub-cluster	NAICS Code	2001 Employment Location Quotient	2006 Employment Location Quotient	2001 to 2006 Change in Employment Location Quotient	2006 Employment	2006 Average Annual Wage	2006 Number of Firms
Wood product manufacturing	321	0.88	ND	-	ND	ND	3
Clay product and refractory manufacturing	3271	NC	ND	-	ND	ND	2
Cement and concrete product manufacturing	3273	ND	3.05	-	253	\$44,036	10
Lime and gypsum product manufacturing	3274	NC	NC	-	NC	-	0
Other nonmetallic mineral products	3279	NC	NC	-	NC	NC	0
Fabricated metal product manufacturing	332	0.11	ND	-	ND	ND	2
Machinery manufacturing	333	ND	0.23	-	92	\$42,276	7
Electrical equipment and appliance manufacturing	335	NC	ND	-	ND	ND	1
Furniture and related product manufacturing	337	1.13	1.07	-0.06	199	\$36,388	19
Total for Cluster		-	-	-	544	\$40,941	44

RERI: Florida Gulf Coast University; Source: BLS and AWI Data **NC:** Not Calculable (does not exist or zero); **ND:** Not Disclosable; **NA:** Not Applicable

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Table 3.26-2

Collier County Building Component Manufacturing Cluster Data							
Sub-cluster	NAICS Code	2001 Employment Location Quotient	2006 Employment Location Quotient	2001 to 2006 Change in Employment Location Quotient	2006 Employment	2006 Average Annual Wage	2006 Number of Establish- ments
Wood product manufacturing	321	0.23	0.28	0.05	170	ND	11
Clay product and refractory manufacturing	3271	ND	ND	-	ND	ND	1
Cement and concrete product manufacturing	3273	2.23	1.92	-0.31	518	\$49,263	15
Lime and gypsum product manufacturing	3274	ND	NC	-	NC	NC	0
Other nonmetallic mineral products	3279	2.79	1.63	-1.16	140	\$34,919	7
Fabricated metal product manufacturing	332	0.21	0.18	-0.03	304	\$37,841	21
Machinery manufacturing	333	0.08	0.08	0	107	\$42,025	11
Electrical equipment and appliance mfg.	335	0.45	0.56	0.11	262	\$38,238	9
Furniture and related product manufacturing	337	0.92	0.81	-0.11	492	\$42,547	60
		-	-	-	-	-	
Total for Cluster		1.17	0.94	-0.23	1,993	\$38,815	135
RERI:Florida Gulf Coast University; Source: BLS and AWI Data NC: Not Calculable (does not exist or zero); ND: Not Disclosable; NA: Not Applicable							

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Table 3.26-3

Lee County Building Component Manufacturing Cluster Data							
Sub-cluster	NAICS Code	2001 Employment Location Quotient	2006 Employment Location Quotient	2001 to 2006 Change in Employment Location Quotient	2006 Employment	2006 Average Annual Wage	2006 Number of Establishments
Wood product manufacturing	321	0.39	0.72	0.33	683	\$36,056	19
Clay product and refractory manufacturing	3271	0.27	ND	-	ND	ND	4
Cement and concrete product manufacturing	3273	2.82	3.56	0.74	1,506	\$43,897	38
Lime and gypsum product manufacturing	3274	0.95	ND	-	ND	ND	4
Other nonmetallic mineral products	3279	0.15	0.44	0.29	59	\$32,357	8
Fabricated metal product manufacturing	332	0.24	0.39	0.15	1,017	\$38,781	52
Machinery manufacturing	333	0.40	0.39	-0.01	778	\$39,861	32
Electrical equipment and appliance mfg.	335	0.19	0.18	-0.01	129	\$53,904	6
Furniture and related product manufacturing	337	0.61	0.83	0.22	787	\$37,044	74
Total for Cluster		1.07	1.46	0.39	4,959	\$40,170	237
RERI: Florida Gulf Coast University; Source: BLS and AWI Data NC: Not Calculable (does not exist or zero); ND: Not Disclosable; NA: Not Applicable							

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Table 3.27-1

Charlotte County Business Services Cluster Data							
Sub-cluster	NAICS Code	2001 Employment Location Quotient	2006 Employment Location Quotient	2001 to 2006 Change in Employment Location Quotient	2006 Employment	2006 Average Annual Wage	2006 Number of Establish- ments
Data Processing	5142	-	NC	-	NC	-	91
Legal services	5411	0.81	0.95	0.14	373	\$74,547	76
Accounting and bookkeeping services	5412	0.50	0.93	0.43	278	\$32,878	60
Architectural and engineering services	5413	0.75	0.86	0.11	398	\$44,507	79
Computer systems design and related services	5415	0.14	0.15	0.01	64	\$34,170	30
Management and technical consulting services	5416	0.72	0.77	0.05	240	\$59,201	96
Other professional and technical services	5419	0.83	1.38	0.55	251	\$29,920	41
Office administrative services	5611	0.25	0.50	0.25	61	\$63,765	19
Employment services	5613	ND	0.31	NA	369	\$16,892	16
Services to buildings and dwellings	5617	1.33	1.10	-0.23	655	\$25,112	177
Total for Cluster		0.94	0.88	-0.06	2,689	\$33,815	685

RERI:Florida Gulf Coast University: Source: BLS and AWI Data **NC:** Not Calculable (does not exist or zero); **ND:** Not Disclosable; **NA:** Not Applicable

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Table 3.27-2

Collier County Business Services Cluster Data							
Sub-cluster	NAICS Code	2001 Employment Location Quotient	2006 Employment Location Quotient	2001 to 2006 Change in Employment Location Quotient	2006 Employment	2006 Average Annual Wage	2006 Number of Establish- ments
Data Processing	5142	-	NC	-	NC	-	0
Legal services	5411	1.19	1.05	-0.14	1,338	\$72,609	296
Accounting and bookkeeping services	5412	0.76	0.65	-0.11	626	\$50,769	203
Architectural and engineering services	5413	0.94	0.91	-0.03	1,361	\$58,951	186
Computer systems design and related services	5415	0.18	0.17	-0.01	238	\$103,105	127
Management and technical consulting services	5416	0.53	0.52	-0.01	524	\$77,149	373
Other professional and technical services	5419	0.75	0.74	-0.01	436	\$37,972	87
Office administrative services	5611	1.39	1.19	-0.2	474	\$70,308	87
Employment services	5613	1.01	0.73	-0.28	2,832	\$26,843	35
Services to buildings and dwellings	5617	1.97	2.28	0.31	4,421	\$26,392	650
Total for Cluster		1.25	1.34	0.09	12,250	\$38,880	2044

RERI: Florida Gulf Coast University; Source: BLS and AWI Data **NC:** Not Calculable (does not exist or zero); **ND:** Not Disclosable; **NA:** Not Applicable

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Table 3.27-3

Lee County Business Services Cluster Data							
Sub-cluster	NAICS Code	2001 Employment Location Quotient	2006 Employment Location Quotient	2001 to 2006 Change in Employment Location Quotient	2006 Employment	2006 Average Annual Wage	2006 Number of Establish- ments
Data Processing	5142	-	NC	-	NC	-	91
Legal services	5411	1.04	1.09	0.05	2,183	\$60,330	413
Accounting and bookkeeping services	5412	1.3	0.92	-0.38	1,397	\$37,500	277
Architectural and engineering services	5413	1.09	1.17	0.08	2,755	\$54,696	310
Computer systems design and related services	5415	0.24	0.29	0.05	640	\$56,675	180
Management and technical consulting services	5416	1.2	0.84	-0.36	1,329	\$63,794	426
Other professional and technical services	5419	1.02	0.97	-0.05	903	\$31,314	138
Office administrative services	5611	1.64	0.94	-0.7	586	\$57,448	122
Employment services	5613	1.09	0.65	-0.44	3,957	\$24,803	78
Services to buildings and dwellings	5617	1.51	1.66	0.15	5,052	\$27,932	890
Total for Cluster		1.19	1.09	-0.10	18,802	\$35,754	2,925
RERI: Florida Gulf Coast University; Source: BLS and AWI Data NC: Not Calculable (does not exist or zero); ND: Not Disclosable; NA: Not Applicable							

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Table 3.28-1

Charlotte County Entertainment Cluster Data							
Sub-cluster	NAICS Code	2001 Employment Location Quotient	2006 Employment Location Quotient	2001 to 2006 Change in Employment Location Quotient	2006 Employment	2006 Average Annual Wage	2006 Number of Establish- ments
Performing arts and spectator sports	711	ND	0.05	-	6	\$36,450	7
Museums, historical sites, zoos, and parks	712	ND	ND	-	ND	ND	1
Amusements, gambling, and recreation	713	2.12	1.94	-0.18	898	\$17,399	48
Motion picture and sound recording industries	512	ND	ND	-	ND	ND	3
Broadcasting, except Internet	515	ND	0.41	-	45	\$41,292	5
Total for Cluster		2.12	1.86	-0.26	949	\$18,652	64
RERI:Florida Gulf Coast University: Source: BLS and AWI Data NC: Not Calculable (does not exist or zero); ND: Not Disclosable; NA: Not Applicable							

**Traded Business Cluster Study
Charlotte, Collier, and Lee Counties**

Table 3.28-2

Collier County Entertainment Cluster Data							
Sub-cluster	NAICS Code	2001 Employment Location Quotient	2006 Employment Location Quotient	2001 to 2006 Change in Employment Location Quotient	2006 Employment	2006 Average Annual Wage	2006 Number of Establish- ments
Performing arts and spectator sports	711	1.24	0.93	-0.31	394	\$81,053	48
Museums, historical sites, zoos, and parks	712	0.66	0.75	0.09	98	\$40,075	15
Amusements, gambling, and recreation	713	3.73	4.08	0.35	6,138	\$33,226	163
Motion picture and sound recording industries	512	0.52	0.33	-0.19	132	\$17,063	19
Broadcasting, except Internet	515	ND	ND	-	ND	ND	4
		-	-	-	-	-	
Total for Cluster		3.37	3.77	0.40	5,629	\$35,796	249
RERI: Florida Gulf Coast University; Source: BLS and AWI Data NC : Not Calculable (does not exist or zero); ND : Not Disclosable; NA : Not Applicable							

**Traded Business Cluster Study
Charlotte, Collier, and Lee Counties**

Table 3.28-3

Lee County Entertainment Cluster Data							
Sub-cluster	NAICS Code	2001 Employment Location Quotient	2006 Employment Location Quotient	2001 to 2006 Change in Employment Location Quotient	2006 Employment	2006 Average Annual Wage	2006 Number of Establishments
Performing arts and spectator sports	711	1.79	1.42	-0.37	950	\$24,518	80
Museums, historical sites, zoos, and parks	712	0.26	0.15	-0.11	31	\$24,147	9
Amusements, gambling, and recreation	713	2.03	2.12	0.09	5,003	\$27,508	217
Motion picture and sound recording industries	512	0.49	0.43	-0.06	271	\$22,271	37
Broadcasting, except Internet	515	1.81	1.36	-0.45	791	\$52,290	19
		-	-	-	-	-	
Total for Cluster		1.88	1.87	-0.01	6,506	\$29,671	362
RERI:Florida Gulf Coast University: Source: BLS and AWI Data NC: Not Calculable (does not exist or zero); ND: Not Disclosable; NA: Not Applicable							

**Traded Business Cluster Study
Charlotte, Collier, and Lee Counties**

Table 3.29-1

Charlotte County Financial Services Cluster Data							
Sub-cluster	NAICS Code	2001 Employment Location Quotient	2006 Employment Location Quotient	2001 to 2006 Change in Employment Location Quotient	2006 Employment	2006 Average Annual Wage	2006 Number of Establish- ments
Commercial banking	52211	0.91	1.39	0.48	613	\$40,873	47
Savings institutions	52212	ND	ND	-	ND	ND	4
Credit unions	52213	ND	0.44	-	32	\$27,015	4
Nondepository credit intermediation	5222	0.35	0.39	0.04	101	\$58,371	23
Mortgage and nonmortgage loan brokers	52231	ND	ND	-	72	\$48,858	11
Financial transaction processing and clearing	52232	NC	NC	-	NC	NC	0
Other credit intermediation activities	52239	ND	ND	-	11	\$20,761	7
Insurance carriers	5241	0.25	0.14	-0.11	61	\$51,717	18
Insurance and employee benefit funds	5251	NC	NC	-	NC	NC	0
Other investment pools and funds	5259	ND	ND	-	ND	ND	1
Total for Cluster		NA	NA	-	890	\$43,501	115
RERI:Florida Gulf Coast University: Source: BLS and AWI Data NC: Not Calculable (does not exist or zero); ND: Not Disclosable; NA: Not Applicable							

**Traded Business Cluster Study
Charlotte, Collier, and Lee Counties**

Table 3.29-2

Collier County Financial Services Cluster Data							
Sub-cluster	NAICS Code	2001 Employment Location Quotient	2006 Employment Location Quotient	2001 to 2006 Change in Employment Location Quotient	2006 Employment	2006 Average Annual Wage	2006 Number of Establish- ments
Commercial banking	52211	1.29	1.22	-0.07	1,755	\$85,932	100
Savings institutions	52212	ND	0.17	-	45	\$50,520	5
Credit unions	52213	ND	ND	-	ND	ND	6
Nondepository credit intermediation	5222	0.30	0.43	0.13	362	\$67,673	80
Mortgage and nonmortgage loan brokers	52231	1.99	0.84	-1.15	132	\$62,603	64
Financial transaction processing and clearing	52232	ND	ND	-	ND	ND	1
Other credit intermediation activities	52239	ND	0.35	-	38	\$42,082	10
Insurance carriers	5241	0.23	0.22	-0.01	295	\$61,681	53
Insurance and employee benefit funds	5251	NC	ND	-	ND	ND	1
Other investment pools and funds	5259	ND	0.27	-	13	\$43,617	8
Total for Cluster		1.10	0.93	-0.17	2,709	\$76,775	328
RERI:Florida Gulf Coast University; Source: BLS and AWI Data NC: Not Calculable (does not exist or zero); ND: Not Disclosable; NA: Not Applicable							

**Traded Business Cluster Study
Charlotte, Collier, and Lee Counties**

Table 3.29-3

Lee County Financial Services Cluster Data							
Sub-cluster	NAICS Code	2001 Employment Location Quotient	2006 Employment Location Quotient	2001 to 2006 Change in Employment Location Quotient	2006 Employment	2006 Average Annual Wage	2006 Number of Establish- ments
Commercial banking	52211	1.04	1.00	-0.04	2,253	\$47,975	170
Savings institutions	52212	0.26	0.18	-	73	62496	13
Credit unions	52213	ND	ND	-	ND	ND	10
Nondepository credit intermediation	5222	0.58	0.57	-0.01	756	\$57,817	175
Mortgage and nonmortgage loan brokers	52231	ND	1.36	-	337	\$43,788	121
Financial transaction processing and clearing	52232	ND	0.06	-	10	\$24,358	4
Other credit intermediation activities	52239	0.58	0.77	0.19	130	\$55,190	38
Insurance carriers	5241	0.34	0.34	0.00	724	\$54,142	102
Insurance and employee benefit funds	5251	ND	0.06	-	5	34469	3
Other investment pools and funds	5259	ND	0.25	-	19	\$85,340	12
Total for Cluster		0.79	0.81	0.02	4,307	\$50,873	648
RERI:Florida Gulf Coast University: Source: BLS and AWI Data NC: Not Calculable (does not exist or zero); ND: Not Disclosable; NA Not Applicable.							

**Traded Business Cluster Study
Charlotte, Collier, and Lee Counties**

Table 3.30-1

Charlotte County Printing and Publishing Cluster Data							
Sub-cluster	NAICS Code	2001 Employment Location Quotient	2006 Employment Location Quotient	2001 to 2006 Change in Employment Location Quotient	2006 Employment	2006 Average Annual Wage	2006 Number of Establish- ments
Commercial flexographic printing	323112	NC	NC	-	NC	NC	0
Commercial screen printing	323113	ND	ND	-	ND	ND	3
Digital printing	323115	ND	ND	-	16	ND	3
Other commercial printing	323119	NC	ND	-	NC	NC	0
Periodical publishers	51112	ND	NC	-	NC	NC	0
Book publishers	51113	ND	ND	-	ND	ND	2
Directory and mailing list publishers	51114	NC	NC	-	NC	NC	0
Other publishers	51119	NC	ND	-	ND	ND	1
Advertising and related services	5418	0.05	0.11	0.06	17	\$40,374	8
		-	-	-	-	-	
Total for Cluster		0.05	0.11	0.06	33	-	17

RERI: Florida Gulf Coast University: Source: BLS and AWI Data **NC**: Not Calculable (does not exist or zero); **ND**: Not Disclosable; **NA**: Not Applicable

**Traded Business Cluster Study
Charlotte, Collier, and Lee Counties**

Table 3.30-2

Collier County Printing and Publishing Cluster Data							
Sub-cluster	NAICS Code	2001 Employment Location Quotient	2006 Employment Location Quotient	2001 to 2006 Change in Employment Location Quotient	2006 Employment	2006 Average Annual Wage	2006 Number of Establishments
Commercial flexographic printing	323112	0.1	ND	-	ND	ND	1
Commercial screen printing	323113	0.51	0.66	0.15	48	\$27,872	6
Digital printing	323115	NC	ND	-	ND	ND	3
Other commercial printing	323119	0.15	ND	-	ND	ND	2
Periodical publishers	51112	0.02	0.64	0.62	99	\$46,302	10
Book publishers	51113	1.61	0.97	-0.64	85	\$51,989	7
Directory and mailing list publishers	51114	0.18	ND	-	ND	ND	3
Other publishers	51119	ND	ND	-	ND	-	2
Advertising and related services	5418	0.35	0.40	0.05	200	\$55,153	72
		-	-	-	432	-	
Total for Cluster		0.82	0.60	-0.22	864	\$49,471	106

RERI: Florida Gulf Coast University; Source: BLS and AWI Data **NC:** Not Calculable (does not exist or zero); **ND:** Not Disclosable; **NA:** Not Applicable

**Traded Business Cluster Study
Charlotte, Collier, and Lee Counties**

Table 3.30-3

Lee County Printing and Publishing Cluster Data							
Sub-cluster	NAICS Code	2001 Employment Location Quotient	2006 Employment Location Quotient	2001 to 2006 Change in Employment Location Quotient	2006 Employment	2006 Average Annual Wage	2006 Number of Establish- ments
Commercial flexographic printing	323112	ND	ND	-	ND	ND	3
Commercial screen printing	323113	0.62	0.79	0.17	90	\$50,177	10
Digital printing	323115	ND	0.65	-	24	\$31,379	5
Other commercial printing	323119	ND	ND	-	ND	30465	4
Periodical publishers	51112	0.82	0.44	-0.38	108	\$36,407	20
Book publishers	51113	ND	ND	-	ND	-	2
Directory and mailing list publishers	51114	ND	3.03	-	231	\$31,595	8
Other publishers	51119	ND	ND	-	ND	-	1
Advertising and related services	5418	0.77	0.57	-0.20	439	\$42,270	115
		-	-	-	-	-	
Total for Cluster		0.77	1.21	0.44	892	\$39,300	168
RERI:Florida Gulf Coast University: Source: BLS and AWI 2004 Data NC: Not Calculable (does not exist or zero); ND: Not Disclosable							

**Traded Business Cluster Study
Charlotte, Collier, and Lee Counties**

Table 3.31-1

Charlotte County Transportation and Warehousing Cluster Data							
Sub-cluster	NAICS Code	2001 Employment Location Quotient	2006 Employment Location Quotient	2001 to 2006 Change in Employment Location Quotient	2006 Employment	2006 Average Annual Wage	2006 Number of Establish- ments
Motor vehicle and parts merchant wholesalers	4231	0.32	0.17	-0.15	20	\$30,752	6
Furniture and furnishing merchant wholesalers	4232	0.21	0.44	0.23	17	\$27,575	6
Lumber and const. supply merchant wholesalers	4233	0.41	1.09	0.68	96	\$42,314	12
Commercial equip. merchant wholesalers	4234	0.16	0.08	-0.08	18	\$53,221	12
Metal and mineral merchant wholesalers	4235	0.17	0.16	-0.01	7	\$51,601	5
Electric goods merchant wholesalers	4236	0.23	0.28	0.05	32	\$56,975	9
Hardware and plumbing merchant wholesalers	4237	0.93	0.44	-0.49	37	\$34,467	5
Machinery and supply merchant wholesalers	4238	0.34	0.45	0.11	102	\$37,024	18
Misc. durable goods merchant wholesalers	4239	0.28	0.12	-0.16	12	\$53,598	5
Total for Cluster		0.43	0.56	0.13	341	\$39,947	78
RERI:Florida Gulf Coast University: Source: BLS and AWI Data NC: Not Calculable (does not exist or zero); ND: Not Disclosable; NA Not Applicable							

**Traded Business Cluster Study
Charlotte, Collier, and Lee Counties**

Table 3.31-2

Collier County Transportation and Warehousing Cluster Data							
Sub-cluster	NAICS Code	2001 Employment Location Quotient	2006 Employment Location Quotient	2001 to 2006 Change in Employment Location Quotient	2006 Employment	2006 Average Annual Wage	2006 Number of Establish- ments
Motor vehicle and parts merchant wholesalers	4231	0.25	0.15	-0.1	55	\$34,855	15
Furniture and furnishing merchant wholesalers	4232	0.15	0.32	0.17	40	\$32,975	14
Lumber and const. supply merchant wholesalers	4233	1.4	1.28	-0.12	367	\$44,994	38
Commercial equip. merchant wholesalers	4234	0.44	0.5	0.06	353	\$106,175	42
Metal and mineral merchant wholesalers	4235	0.17	0.22	0.05	31	\$53,375	12
Electric goods merchant wholesalers	4236	0.54	0.42	-0.12	159	\$64,933	21
Hardware and plumbing merchant wholesalers	4237	0.46	0.34	-0.12	93	\$45,000	16
Machinery and supply merchant wholesalers	4238	0.34	0.24	-0.1	179	\$47,660	38
Misc. durable goods merchant wholesalers	4239	0.58	0.45	-0.13	140	\$46,043	33
Total for Cluster		0.63	0.59	-0.04	1,417	\$61,196	229
RERI:FGCU: Source: BLS and AWI Data NC: Not Calculable (does not exist or zero); ND: Not Disclosable; NA: Not Applicable							

**Traded Business Cluster Study
Charlotte, Collier, and Lee Counties**

Table 3.31-3

Lee County Transportation and Warehousing Cluster Data							
Sub-cluster	NAICS Code	2001 Employment Location Quotient	2006 Employment Location Quotient	2001 to 2006 Change in Employment Location Quotient	2006 Employment	2006 Average Annual Wage	2006 Number of Establishments
Motor vehicle and parts merchant wholesalers	4231	0.45	0.41	-0.04	244	\$53,210	33
Furniture and furnishing merchant wholesalers	4232	0.52	1.15	0.63	225	\$45,340	25
Lumber and const. supply merchant wholesalers	4233	1.14	1.29	0.15	583	\$47,338	50
Commercial equip. merchant wholesalers	4234	0.48	0.46	-0.02	512	\$57,422	74
Metal and mineral merchant wholesalers	4235	0.42	0.46	0.04	101	\$39,060	11
Electric goods merchant wholesalers	4236	0.91	0.88	-0.03	516	\$62,954	57
Hardware and plumbing merchant wholesalers	4237	0.6	0.74	0.14	318	\$49,666	40
Machinery and supply merchant wholesalers	4238	1.12	1.1	-0.02	1,269	\$50,622	83
Misc. durable goods merchant wholesalers	4239	0.67	0.63	-0.04	311	\$38,774	45
Total for Cluster		0.85	0.93	0.08	4,079	\$50,198	418
RERI:FGCU: Source: BLS and AWI Data NC : Not Calculable (does not exist or zero); ND : Can not disclose; NA Not Applicable.							

**Traded Business Cluster Study
Charlotte, Collier, and Lee Counties**

Table 3.32-1

Charlotte County Visitor Services Cluster Data							
Sub-cluster	NAICS Code	2001 Employment Location Quotient	2006 Employment Location Quotient	2001 to 2006 Change in Employment Location Quotient	2006 Employment	2006 Average Annual Wage	2006 Number of Establishments
Water transportation	483	ND	ND	-	ND	ND	1
Transit and ground passenger transportation	485	0.06	0.07	0.01	10	\$72,404	8
Scenic and sightseeing transportation	487	2.58	2.08	-0.50	19	\$21,447	6
Support activities for transportation	488	0.14	0.14	0.00	27	\$44,619	8
Rental and leasing services	532	ND	0.59	-	126	\$32,640	23
Amusements, gambling, and recreation	713	2.12	1.94	-0.18	899	\$17,399	48
Accommodation	721	1.28	0.56	-0.72	341	\$15,536	27
		-	-	-	-	-	
		-	-	-	-	-	
		-	-	-	-	-	
Total for Cluster		1.72	1.44	-0.28	1,422	\$19,260	121

RERI:FGCU: Source: BLS and AWI 2004 Data **NC:** Not Calculable (does not exist or zero); **ND:** Not Disclosable; **NA** Not Applicable

**Traded Business Cluster Study
Charlotte, Collier, and Lee Counties**

Table 3.32-2

Collier County Visitor Services Cluster Data							
Sub-cluster	NAICS Code	2001 Employment Location Quotient	2006 Employment Location Quotient	2001 to 2006 Change in Employment Location Quotient	2006 Employment	2006 Average Annual Wage	2006 Number of Establish- ments
Water transportation	483	ND	ND	-	ND	ND	1
Transit and ground passenger transportation	485	0.53	0.42	-0.11	184	\$25,653	24
Scenic and sightseeing transportation	487	3.94	5.83	1.89	173	\$26,206	6
Support activities for transportation	488	0.35	0.10	-0.25	125	\$38,703	48
Rental and leasing services	532	ND	ND	-	464	\$37,805	81
Amusements, gambling, and recreation	713	3.73	4.08	0.35	6,478	\$33,226	163
Accommodation	721	2.50	2.27	-0.23	4,498	\$30,292	66
		-	-	-	-	-	
		-	-	-	-	-	
		-	-	-	-	-	
Total for Cluster		3.04	3.17	0.13	11,922	\$32,136	389
RERI:FGCU: Source: BLS and AWI 2004 Data NC: Not Calculable (does not exist or zero); ND: Not Disclosable; NA Not Applicable							

**Traded Business Cluster Study
Charlotte, Collier, and Lee Counties**

Table 3.32-3

Lee County Visitor Services Cluster Data							
Sub-cluster	NAICS Code	2001 Employment Location Quotient	2006 Employment Location Quotient	2001 to 2006 Change in Employment Location Quotient	2006 Employment	2006 Average Annual Wage	2006 Number of Establish- ments
Water transportation	483	ND	ND	-	ND	ND	1
Transit and ground passenger transportation	485	0.40	0.13	-0.27	86	\$26,542	8
Scenic and sightseeing transportation	487	2.34	1.46	-0.88	68	\$28,363	31
Support activities for transportation	488	0.48	0.33	-0.15	1,026	\$40,260	67
Rental and leasing services	532	1.65	1.44	-0.21	1,566	\$29,288	144
Amusements, gambling, and recreation	713	2.03	2.12	0.09	5,006	\$27,508	217
Accommodation	721	1.22	1.38	0.16	4,283	\$25,392	145
		-	-	-	-	-	
		-	-	-	-	-	
		-	-	-	-	-	
		-	-	-	-	-	
Total for Cluster		1.59	1.60	0.01	12,035	\$28,072	613

RERI:FGCU: Source: BLS and AWI 2004 Data **NC:** Not Calculable (does not exist or zero); **ND:** Not Disclosable; **NA** Not Applicable

**Traded Business Cluster Study
Charlotte, Collier, and Lee Counties**

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