



Target Employment and Industrial Land Study for the Pinellas Community Appendices

April 8, 2008



Cover photos, from top to bottom:

- Nielsen Media Research, Oldsmar. (Photo courtesy of Nielsen Media Research.)
- Hercules Hydraulics, Clearwater.
- Carillon Office Park, St. Petersburg.
- Young-Rainey STAR Center, unincorporated Pinellas County.

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Appendix A: Survey Instrument and Results

As a part of the Pinellas County Industrial Land Study, a direct mail survey of existing businesses within defined target industries was developed by Pinellas Planning Council and Pinellas County Economic Development staff with technical assistance by consultant WilsonMiller. The survey included 23 questions that gauged the respondents' understanding of, and collected input on, the direct and indirect needs and effects of business development in the county.

A survey mailing list was prepared using two data sources, the *Quarterly Census of Employment and Wages* (QCEW) and *MarketPlace* produced by a private company, Dun & Bradstreet (D&B).¹ Two lists of companies from QCEW and D&B were matched using name and address data, and known duplicates were removed. Some difficulties were encountered when combining the two mailing lists, as duplicates were sometimes difficult to identify accurately. If there was doubt as to whether a contact was duplicated in the combined list, both addresses were retained. This initial list contained 2,328 contacts.

As the study had certain funding and time constraints, and the focus of the survey was to collect data from the users of industrial and other employment-generating lands and not home-based businesses, a approximately 20 percent sample of the firm locations employing less than 5 persons was selected to reduce the number of surveys to be mailed out and tallied.

In late December 2006, pre-survey notification postcards were mailed to the contacts advising them of the upcoming survey. This allowed invalid addresses to be identified and culled from the list. The final sample size for the survey was 2,138 firms.

In early January 2007, the remaining contacts were mailed the survey package, which included a cover letter, survey, and postage-paid return envelope. A total of 424 surveys were completed and returned. This represents an approximately twenty percent return rate, which is considered to be a high response for a direct mail survey.

In order to focus on the results that would be most useful to countywide land use planning and economic development efforts, the responses were filtered by business size. Focusing only on those businesses with five or more employees served to eliminate most home-based businesses and other proprietorships, which have little impact on the employment-based (e.g., industrial, commercial) land that is the focus of the current study. A detailed summary of the results for businesses with five or more employees is presented below. Questions are shown as they appeared on the survey instrument.

¹ The data sources discussed in this section are described in more detail in Appendix F.

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1. Please describe your ownership status. Choose only one.

- The business:** ☐ Rents or leases office space inside a larger building or complex
☐ Rents or leases one or more entire buildings on one parcel of land
☐ Owns both the building and land
☐ Is a home-based business

Sixty-one percent of respondents reported renting or leasing space inside a larger building. Financial Services, Information Technology, Microelectronics, Research/Development, and Wireless Technology businesses leaned more towards renting space. A significant portion (38 percent), including Aviation/Aerospace, Modeling/Simulation, and Marine Science businesses, tend to own their both buildings and land. The remaining one percent were home-based or did not provide any information.

| Question 1 | Rents or Leases Entire Building | Rents or Leases Office Space | Owns Building and Land | Home-based | DNA/NA* | Total |
|------------------------------|---------------------------------|------------------------------|------------------------|------------|----------|------------|
| Target Industry Cluster | | | | | | |
| Aviation/Aerospace | 2 | 2 | 6 | 0 | 0 | 10 |
| Financial Services | 9 | 27 | 17 | 0 | 0 | 53 |
| High Tech Industries | 18 | 50 | 39 | 1 | 0 | 108 |
| Information Technology | 7 | 32 | 16 | 1 | 0 | 56 |
| Medical Technology | 9 | 16 | 12 | 0 | 0 | 37 |
| Microelectronics | 7 | 33 | 17 | 0 | 0 | 57 |
| Modeling/Simulation | 2 | 3 | 5 | 0 | 0 | 10 |
| Optics/Photonics | 1 | 2 | 1 | 0 | 0 | 4 |
| Marine Science | 16 | 32 | 39 | 1 | 1 | 89 |
| Research/Development | 4 | 29 | 14 | 0 | 1 | 48 |
| Wireless Technology | 1 | 4 | 1 | 0 | 0 | 6 |
| All Target Industries | 53 | 136 | 116 | 2 | 2 | 309 |

* Did Not Answer/Not Applicable

2. Approximately how many employees does your business currently employ at this location? _____

Breaking down the answers into employment ranges shows that almost two-thirds (65 percent) of all target industry business locations employ from 5 to 24 people. The largest businesses that responded to the survey were found in the Financial Services (3,500 employees) and Research/Development (2,250 employees) clusters. Median employment per business is much smaller than average employment, as each cluster had one or more large businesses that increased the average employment per cluster due to their size. Overall, average employment per business was 66 and median employment was 13.

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Businesses in the Aviation/Aerospace, Modeling/Simulation, and Wireless Technology clusters had larger median employment, while most other clusters were close to the overall median.

| Question 2A | | | | | | | |
|--------------------------------|---------------|-----------------|-----------------|-----------------|-------------------|----------------------|--------------|
| Target Industry Cluster | 5 to 9 | 10 to 24 | 25 to 49 | 50 to 99 | 100 to 249 | 250 and above | Total |
| Aviation/Aerospace | 1 | 3 | 5 | 0 | 0 | 1 | 10 |
| Financial Services | 22 | 10 | 7 | 3 | 5 | 6 | 53 |
| High Tech Industries | 23 | 43 | 22 | 11 | 7 | 2 | 108 |
| Information Technology | 18 | 18 | 9 | 6 | 3 | 2 | 56 |
| Marine Science | 28 | 39 | 10 | 7 | 4 | 1 | 89 |
| Medical Technology | 12 | 8 | 4 | 10 | 3 | 0 | 37 |
| Microelectronics | 15 | 23 | 10 | 5 | 3 | 1 | 57 |
| Modeling/Simulation | 1 | 4 | 2 | 1 | 1 | 1 | 10 |
| Optics/Photonics | 1 | 2 | 0 | 0 | 1 | 0 | 4 |
| Research/Development | 16 | 18 | 7 | 4 | 2 | 1 | 48 |
| Wireless Technology | 0 | 3 | 1 | 0 | 1 | 1 | 6 |
| All Target Industries | 97 | 103 | 47 | 29 | 20 | 13 | 309 |

3. Please identify your business as part of one of the following business sectors:

- | | |
|---|--|
| <input type="radio"/> Marine | <input type="radio"/> Aviation |
| <input type="radio"/> Pharmaceuticals | <input type="radio"/> Electronics |
| <input type="radio"/> Telecommunications | <input type="radio"/> Computing |
| <input type="radio"/> Media/creative arts | <input type="radio"/> Scientific research |
| <input type="radio"/> Financial Services | <input type="radio"/> General Manufacturing or Fabrication |
| <input type="radio"/> Other (specify) _____ | |

| Question 2B | | | | | | |
|--------------------------------|-----------------------------|----------------------------------|----------------------------------|----------------------------------|---------------------------------|-----------------------------|
| Target Industry Cluster | Number of Businesses | Minimum Jobs Per Business | Maximum Jobs Per Business | Average Jobs Per Business | Median Jobs Per Business | Total Jobs (Rounded) |
| Aviation/Aerospace | 10 | 8 | 350 | 54 | 26 | 540 |
| Financial Services | 53 | 5 | 3,500 | 137 | 15 | 7,246 |
| High Tech Industries | 108 | 5 | 2,250 | 52 | 15 | 5,656 |
| Information Technology | 56 | 5 | 600 | 43 | 12 | 2,434 |
| Marine Science | 89 | 5 | 275 | 27 | 12 | 2,431 |
| Medical Technology | 37 | 5 | 200 | 38 | 20 | 1,418 |
| Microelectronics | 57 | 5 | 600 | 38 | 13 | 2,163 |
| Modeling/Simulation | 10 | 7 | 250 | 56 | 24 | 560 |
| Optics/Photonics | 4 | 5 | 200 | 58 | 13 | 231 |
| Research/Development | 48 | 5 | 2,250 | 70 | 12 | 3,374 |
| Wireless Technology | 6 | 12 | 250 | 74 | 23 | 442 |
| All Target Industries | 309 | 5 | 3,500 | 66 | 13 | 20,284 |

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Because there was so much variation in answering this question, the results were replaced with the following data taken from industry codes for each business.² Because each business may be assigned to multiple clusters, the total in the final row of the table below does not equal the sum of the rows above.

The High Tech cluster is the largest, encompassing about 35 percent of respondents, virtually all of which are also found in other clusters. The next largest are Marine Science (29 percent), and Microelectronics and Financial Services (eighteen percent each).

| Question 3 | |
|------------------------------|------------|
| Target Industry Cluster | Total |
| Aviation/Aerospace | 10 |
| Financial Services | 53 |
| High Tech Industries | 108 |
| Information Technology | 56 |
| Marine Science | 89 |
| Medical Technology | 37 |
| Microelectronics | 57 |
| Modeling/Simulation | 10 |
| Optics/Photonics | 4 |
| Research/Development | 48 |
| Wireless Technology | 6 |
| All Target Industries | 309 |

4. Please estimate the percentage of your products/services that are sold:

| | |
|---|--------------|
| <u>Inside</u> Pinellas County: | _____ % |
| <u>Outside</u> Pinellas County, but <u>Inside</u> the Tampa Bay region: | _____ % |
| <u>Outside</u> Tampa Bay, but <u>Inside</u> Florida: | _____ % |
| <u>Outside</u> Florida, but <u>Inside</u> the United States: | _____ % |
| <u>Outside</u> the United States: | _____ % |
| Total | 100 % |

This question was one of the more complex to analyze. To simplify the presentation, the respondents were divided into exporting businesses (those that sold more than 50 percent of their output outside Pinellas County, also known as primary, contributory, or basic industries) and non-exporting businesses (those that sold 50 percent or less outside the county, also called secondary, non-contributory, or non-basic industries). The survey shows that, overall, 67 percent of the surveyed businesses are exporters, a lower number

² Cluster data were derived from the federal *Quarterly Census of Employment and Wages* and a private company, Dun & Bradstreet, 2007. More information on these data sources is included in Appendix F.

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than expected due to the targeted nature of the survey. Thirty percent are non-exporters, which is largely due to some large clusters, such as Financial Services and Marine Science, having relatively low export percentages. The remaining three percent did not provide any data.

| Question 4A | | | | |
|------------------------------|------------|---------------|----------|------------|
| Target Industry Cluster | Exporting | Non-Exporting | DNA/NA* | Total |
| Aviation/Aerospace | 9 | 1 | 0 | 10 |
| Financial Services | 27 | 22 | 4 | 53 |
| High Tech Industries | 88 | 17 | 3 | 108 |
| Information Technology | 46 | 9 | 1 | 56 |
| Marine Science | 47 | 40 | 2 | 89 |
| Medical Technology | 30 | 5 | 2 | 37 |
| Microelectronics | 47 | 9 | 1 | 57 |
| Modeling/Simulation | 9 | 1 | 0 | 10 |
| Optics/Photonics | 2 | 1 | 1 | 4 |
| Research/Development | 35 | 11 | 2 | 48 |
| Wireless Technology | 4 | 1 | 1 | 6 |
| All Target Industries | 208 | 92 | 9 | 309 |

* Did Not Answer/Not Applicable

Overall, the larger the business, the more likely it is to be an exporter. All but a few businesses with 25 or more employees were exporters.

Number and Percentage of Exporting Businesses by Employment Range

| Question 4B | | | |
|------------------|------------|---------------|--------------------------|
| Employment Range | Exporting | Non-Exporting | Total Answering Question |
| 5 to 9 | 56 | 38 | 94 |
| 10 to 24 | 61 | 41 | 102 |
| 25 to 49 | 38 | 7 | 45 |
| 50 to 99 | 25 | 2 | 27 |
| 100 to 249 | 17 | 3 | 20 |
| 250 and above | 11 | 1 | 12 |
| Total | 208 | 92 | 300 |

Exporting businesses send, on average, approximately 59 percent of their output outside Florida, and sell only about eleven percent of their output within Pinellas County. Those Medical Technology businesses that are export-based are highly dependent on exporting to other states and countries, as are Wireless Technology businesses.

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Exporting Businesses by Business Size and Average Percentage of Output Sold by Region

| Question 4C | | | | | | |
|------------------------------|------------------------------|---|--|---------------------------------------|------------------------|-------------|
| Target Industry Cluster | Sales within Pinellas County | Sales Outside County but within Tampa Bay | Sales Outside Tampa Bay but within Florida | Sales Outside Florida but within U.S. | Sales Outside the U.S. | Total |
| Aviation/Aerospace | 8% | 14% | 19% | 48% | 12% | 100% |
| Financial Services | 21% | 16% | 27% | 31% | 5% | 100% |
| High Tech Industries | 9% | 13% | 16% | 52% | 10% | 100% |
| Information Technology | 7% | 12% | 12% | 63% | 7% | 100% |
| Marine Science | 15% | 19% | 19% | 40% | 6% | 100% |
| Medical Technology | 4% | 5% | 9% | 66% | 16% | 100% |
| Microelectronics | 9% | 13% | 16% | 53% | 9% | 100% |
| Modeling/Simulation | 8% | 9% | 8% | 60% | 15% | 100% |
| Optics/Photonics | 26% | 1% | 21% | 52% | 0% | 100% |
| Research/Development | 10% | 15% | 23% | 46% | 7% | 100% |
| Wireless Technology | 0% | 1% | 2% | 62% | 35% | 100% |
| All Target Industries | 11% | 13% | 17% | 50% | 9% | 100% |

Businesses that are not exporters, on average, sell the vast majority (84 percent) of their output within Pinellas County. These businesses are most likely supporting other, export-oriented businesses in their industry cluster within the county.

It should be noted that four clusters had a very small sample size of one business each, as noted in the table, meaning that the sales percentages shown represent only the one business that answered the survey and are not indicative of a cluster-wide trend.

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Non-Exporting Businesses by Business Size and Average Percentage of Output Sold by Region

| Question 4D Target Industry Cluster | Sales within Pinellas County | Sales Outside County but within Tampa Bay | Sales Outside Tampa Bay but within Florida | Sales Outside Florida But within U.S. | Sales Outside the U.S. | Total |
|--|------------------------------|---|--|---------------------------------------|------------------------|-------------|
| Aviation/Aerospace* | 60% | 15% | 20% | 5% | 0% | 100% |
| Financial Services | 82% | 12% | 4% | 2% | 0% | 100% |
| High Tech Industries | 80% | 16% | 2% | 2% | 0% | 100% |
| Information Technology | 82% | 15% | 1% | 2% | 0% | 100% |
| Marine Science | 89% | 7% | 2% | 2% | 0% | 100% |
| Medical Technology | 88% | 10% | 0% | 2% | 0% | 100% |
| Microelectronics | 82% | 12% | 3% | 3% | 0% | 100% |
| Modeling/Simulation* | 85% | 10% | 0% | 5% | 0% | 100% |
| Optics/Photonics* | 100% | 0% | 0% | 0% | 0% | 100% |
| Research/Development | 85% | 11% | 4% | 0% | 0% | 100% |
| Wireless Technology* | 100% | 0% | 0% | 0% | 0% | 100% |
| All Target Industries | 84% | 11% | 3% | 2% | 0% | 100% |

* Only one non-exporting business in the applicable cluster answered this question.

5. Was your business founded/started in Pinellas County? Yes ☐ No ☐

Seventy-three percent of responding businesses were founded in Pinellas County. The highest percentages of homegrown businesses were found in Marine Science (85 percent of the businesses in that cluster) and Microelectronics (77 percent), while the lowest were found in Optics/Photonics and Wireless Technology (50 percent each). Larger businesses were less likely to have been founded locally.

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| Question 5 | | | | |
|--------------------------------|------------|-----------|----------------|--------------|
| Target Industry Cluster | Yes | No | DNA/NA* | Total |
| Aviation/Aerospace | 6 | 4 | 0 | 10 |
| Financial Services | 37 | 16 | 0 | 53 |
| High Tech Industries | 77 | 28 | 3 | 108 |
| Information Technology | 39 | 16 | 1 | 56 |
| Marine Science | 76 | 11 | 2 | 89 |
| Medical Technology | 23 | 12 | 2 | 37 |
| Microelectronics | 44 | 11 | 2 | 57 |
| Modeling/Simulation | 6 | 3 | 1 | 10 |
| Optics/Photonics | 2 | 2 | 0 | 4 |
| Research/Development | 35 | 12 | 1 | 48 |
| Wireless Technology | 3 | 2 | 1 | 6 |
| All Target Industries | 226 | 75 | 8 | 309 |

* Did Not Answer/Not Applicable

6. Please describe the site where you are located.

- ☐ This site is the only one operated by my business.
- ☐ This site is a subsidiary or satellite location of a larger business.
- ☐ This site is the headquarters of a larger business.

Sixty-two percent of respondents stated that their businesses operated from a single site. Thirteen percent represented subsidiary or satellite locations of larger firms, while twelve percent represented the headquarters of larger firms. Larger businesses were less likely to be the only location operated by a business, and more likely to be either a headquarters or a subsidiary of a larger organization.

Financial Services businesses were the most likely to be headquarters of larger businesses (including 23 percent of the businesses in that cluster), while Microelectronics businesses were least likely (including only four percent of that cluster).

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| Question 6 | | | | | |
|--------------------------------|------------------|---------------------|-------------------|----------------|--------------|
| Target Industry Cluster | Only Site | Headquarters | Subsidiary | DNA/NA* | Total |
| Aviation/Aerospace | 5 | 1 | 2 | 2 | 10 |
| Financial Services | 23 | 12 | 12 | 6 | 53 |
| High Tech Industries | 75 | 11 | 11 | 11 | 108 |
| Information Technology | 37 | 5 | 7 | 7 | 56 |
| Marine Science | 68 | 5 | 6 | 10 | 89 |
| Medical Technology | 22 | 6 | 4 | 5 | 37 |
| Microelectronics | 46 | 2 | 3 | 6 | 57 |
| Modeling/Simulation | 9 | 0 | 0 | 1 | 10 |
| Optics/Photonics | 2 | 0 | 2 | 0 | 4 |
| Research/Development | 25 | 8 | 7 | 8 | 48 |
| Wireless Technology | 5 | 0 | 1 | 0 | 6 |
| All Target Industries | 193 | 38 | 40 | 38 | 309 |

* Did Not Answer/Not Applicable

- 7. What is the total:** **Building floor area used by your business at this location?**
Floor area: _____ **sq. ft.**
Lot size of your site? _____ **sq. ft. or acres**

Survey recipients were asked to report their building floor area and land parcel size. This information was also collected independently for all of the target industries through a geographic information system (GIS) analysis and included in Chapter 2. However, inclusion of the same questions in the survey allowed the responses to be combined with other survey data, such as the number of employees reported by each business.

Not surprisingly, business locations employing more people required larger floor areas and larger lot sizes. Breaking down building size information by cluster and employment shows that there is significant variation between clusters in how space is used. Overall, businesses in the various target industries reported that they use about 375 square feet per employee on average.

The Marine Science cluster reported the highest number of building square feet per employee, most likely due to the retail and storage nature of many of its businesses. Optics/Photonics businesses reported the lowest square footage per employee.

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| Question 7A | | | | | |
|------------------------------|-----------------------------------|---|-------------------------|-----------|------------|
| Target Industry Cluster | Total Reported Building Size (SF) | Number of Employees in Reported Space * | Average SF Per Employee | DNA/NA** | Total |
| Aviation/Aerospace | 150,305 | 540 | 278 | 0 | 10 |
| Financial Services | 1,709,738 | 6,861 | 249 | 3 | 53 |
| High Tech Industries | 2,146,635 | 5,593 | 384 | 4 | 108 |
| Information Technology | 1,123,905 | 2,375 | 473 | 3 | 56 |
| Marine Science | 1,831,783 | 2,401 | 763 | 3 | 89 |
| Medical Technology | 656,018 | 1,401 | 468 | 2 | 37 |
| Microelectronics | 943,154 | 2,130 | 443 | 2 | 57 |
| Modeling/Simulation | 258,700 | 560 | 462 | 0 | 10 |
| Optics/Photonics | 26,600 | 231 | 115 | 0 | 4 |
| Research/Development | 953,474 | 3,356 | 284 | 1 | 48 |
| Wireless Technology | 167,700 | 442 | 379 | 0 | 6 |
| All Target Industries | 7,405,894 | 19,775 | 375 | 12 | 309 |

* Only businesses that reported both employment numbers and building square footage were included in this analysis.

** Did Not Answer/Not Applicable

Business locations in different industry clusters also had different land use requirements. Overall, target industries reported using 1,731 square feet (or about 0.04 acre) per employee. Again, the Marine Science cluster reported using the largest number of square feet per employee, which is likely due to the storage requirements of the industry. Optics/Photonics again used the least.

| Question 7B | | | | | | |
|------------------------------|---------------|----------------------|----------------------------|-------------------------|------------|------------|
| Target Industry Cluster | Total Acreage | Number of Employees* | Average Acres Per Employee | Average SF Per Employee | DNA/NA** | Total |
| Aviation/Aerospace | 28.0 | 540 | 0.05 | 2,255 | 0 | 10 |
| Financial Services | 131.8 | 6,179 | 0.02 | 929 | 29 | 53 |
| High Tech Industries | 190.7 | 4,672 | 0.04 | 1,778 | 48 | 108 |
| Information Technology | 104.4 | 1,743 | 0.06 | 2,609 | 35 | 56 |
| Marine Science | 215.8 | 2,022 | 0.11 | 4,650 | 25 | 89 |
| Medical Technology | 52.3 | 848 | 0.06 | 2,688 | 14 | 37 |
| Microelectronics | 98.8 | 1,514 | 0.07 | 2,841 | 32 | 57 |
| Modeling/Simulation | 25.7 | 493 | 0.05 | 2,275 | 2 | 10 |
| Optics/Photonics | 0.2 | 31 | 0.01 | 239 | 1 | 4 |
| Research/Development | 55.6 | 2,863 | 0.02 | 846 | 26 | 48 |
| Wireless Technology | 10.4 | 416 | 0.03 | 1,093 | 1 | 6 |
| All Target Industries | 675.6 | 17,005 | 0.04 | 1,731 | 133 | 309 |

* Only businesses that reported both employment numbers and lot size were included in this analysis.

** Did Not Answer/Not Applicable

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8. What is your main activity at this site? Please include the approximate percentage of all interior building space at this site used for each activity.

- ☐ Manufacturing/Fabrication/Production (____%)
- ☐ Office (____%)
- ☐ Storage or Distribution (____%)
- ☐ Laboratory/R&D (____%)
- ☐ Retail (____%)
- ☐ Other (____%)

For this question, businesses were allowed to give multiple answers. Office activities are the most likely to occur of any activity type, and every activity type is found in conjunction with every other activity type, though retail activities were the least likely to occur among the businesses surveyed. All “other” answers were able to be recoded into the major activity types. The Aviation/Aerospace, Medical Technology, and Modeling/Simulation clusters had the highest percentages of businesses with manufacturing uses onsite.

| Question 8A Target Industry Cluster | Manufacturing/ Fabrication/ Production | Office | Storage/ Distribution | Lab/ R&D | Retail |
|--|--|------------|--------------------------|-------------|-----------|
| Aviation/Aerospace | 7 | 8 | 4 | 3 | 1 |
| Financial Services | 4 | 47 | 12 | 3 | 7 |
| High Tech Industries | 41 | 99 | 40 | 29 | 7 |
| Information Technology | 14 | 52 | 19 | 4 | 5 |
| Marine Science | 33 | 63 | 33 | 8 | 25 |
| Medical Technology | 22 | 25 | 16 | 18 | 3 |
| Microelectronics | 14 | 53 | 18 | 6 | 2 |
| Modeling/Simulation | 10 | 10 | 6 | 7 | 0 |
| Optics/Photonics | 2 | 3 | 1 | 0 | 0 |
| Research/Development | 5 | 45 | 8 | 11 | 3 |
| Wireless Technology | 3 | 6 | 3 | 2 | 1 |
| All Target Industries | 98 | 256 | 106 | 52 | 44 |

In aggregate, office uses require over half (54 percent) of all building space, with manufacturing/fabrication/production being second largest at 21 percent. Storage/Distribution occupies eleven percent. Only the Modeling/Simulation, Optics/Photonics, and Wireless Technology clusters devoted more than half of their space to manufacturing purposes. The highest percentages of businesses with retail components were in the Marine Science and Microelectronics clusters.

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| Question 8B | | | | | | |
|------------------------------|--|------------|--------------------------|-------------|-----------|-------------|
| Target Industry Cluster | Manufacturing/ Fabrication/ Production | Office | Storage/ Distribution | Lab/ R&D | Retail | Total |
| Aviation/Aerospace | 4% | 76% | 8% | 2% | 10% | 100% |
| Financial Services | 4% | 76% | 8% | 2% | 10% | 100% |
| High Tech Industries | 25% | 57% | 8% | 9% | 1% | 100% |
| Information Technology | 15% | 73% | 9% | 2% | 1% | 100% |
| Marine Science | 24% | 40% | 14% | 1% | 21% | 100% |
| Medical Technology | 11% | 69% | 14% | 2% | 4% | 100% |
| Microelectronics | 24% | 40% | 14% | 1% | 21% | 100% |
| Modeling/Simulation | 73% | 13% | 8% | 7% | 0% | 100% |
| Optics/Photonics | 60% | 37% | 3% | 0% | 0% | 100% |
| Research/Development | 32% | 49% | 8% | 9% | 2% | 100% |
| Wireless Technology | 60% | 37% | 3% | 0% | 0% | 100% |
| All Target Industries | 21% | 54% | 11% | 5% | 9% | 100% |

9. How much land is used for each of the following purposes? Please include the approximate percentage of all land at this site used for each activity.

- ☐ Building footprint (____ %)
- ☐ Vehicular use areas (____ %)
- ☐ Useable vacant space (not drainage or green space) (____ %)
- ☐ Other: _____ (____ %)
- ☐ Not Applicable

Because many businesses do not own their own land and buildings, this question was left blank by many respondents. To create meaningful findings from the data, only land and building owners were analyzed. On average, 43 percent of land used by surveyed landowners is taken up by the building itself, with an additional 31 percent used for vehicular access of all types (parking, right-of-way, etc.). Fifteen percent remained as usable vacant space. The remainder of eleven percent was calculated from the findings, as hardly any respondent's answers added to 100 percent. Most answers in the "other" category were ignored as they pointed out the amount of land used for green space, drainage, or retention, and the rest were able to be recoded into the major categories above.

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| Question 9 | | | | | |
|--------------------------------|---------------------------|----------------------------|----------------------------|-----------------------|--------------|
| Target Industry Cluster | Building Footprint | Vehicular Use Areas | Usable Vacant Space | Other/DNA/NA * | Total |
| Aviation/Aerospace | 40% | 29% | 19% | 12% | 100% |
| Financial Services | 33% | 38% | 9% | 20% | 100% |
| High Tech Industries | 42% | 32% | 12% | 14% | 100% |
| Information Technology | 43% | 28% | 8% | 20% | 100% |
| Marine Science | 41% | 31% | 23% | 4% | 100% |
| Medical Technology | 64% | 23% | 13% | 0% | 100% |
| Microelectronics | 50% | 30% | 10% | 11% | 100% |
| Modeling/Simulation | 46% | 30% | 10% | 14% | 100% |
| Optics/Photonics | 90% | 10% | 0% | 0% | 100% |
| Research/Development | 50% | 33% | 9% | 8% | 100% |
| Wireless Technology | 40% | 10% | 50% | 0% | 100% |
| All Target Industries | 43% | 31% | 15% | 11% | 100% |

* Did Not Answer/Not Applicable

10. How well does your current site meet your business needs?

| | Excellent | Good | Fair | Poor | Does Not Apply |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Location | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Building floor area | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Condition of building/site | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Access to seaport | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Cost of site | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Parking availability | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Proximity to customers | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Proximity to suppliers | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Proximity to similar or related businesses | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Public transit availability | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Not surprisingly, virtually all respondents had an opinion about their location, building condition, and floor area. However, few had opinions on specialized infrastructure such as the railroad or the seaport.

Those who expressed opinions were highly positive about their location, implying that most would happily stay in the county unless other factors forced them to leave. There was more dissatisfaction over site costs and transit access, but the majority of respondents still felt that these factors were either “excellent” or “good.” The overall satisfaction portrayed in these answers implies that current businesses in their current locations feel adequately served.

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The next few pages contain tables and figures that split out each cluster's answers for each of the factors listed above.

A. Location

| Question 10A | | | | | | |
|------------------------------|------------|------------|-----------|----------|----------|------------|
| Target Industry Cluster | Excellent | Good | Fair | Poor | DNA/NA* | Total |
| Aviation/Aerospace | 2 | 7 | 0 | 1 | 0 | 10 |
| Financial Services | 40 | 10 | 3 | 0 | 0 | 53 |
| High Tech Industries | 53 | 50 | 1 | 1 | 3 | 108 |
| Information Technology | 30 | 21 | 3 | 1 | 1 | 56 |
| Marine Science | 47 | 35 | 4 | 0 | 3 | 89 |
| Medical Technology | 22 | 12 | 1 | 1 | 1 | 37 |
| Microelectronics | 30 | 23 | 1 | 0 | 3 | 57 |
| Modeling/Simulation | 5 | 5 | 0 | 0 | 0 | 10 |
| Optics/Photonics | 0 | 3 | 0 | 0 | 1 | 4 |
| Research/Development | 29 | 17 | 2 | 0 | 0 | 48 |
| Wireless Technology | 1 | 5 | 0 | 0 | 0 | 6 |
| All Target Industries | 174 | 114 | 13 | 3 | 5 | 309 |

* Did Not Answer/Not Applicable

B. Building Floor Area

| Question 10B | | | | | | |
|------------------------------|-----------|------------|-----------|-----------|----------|------------|
| Target Industry Cluster | Excellent | Good | Fair | Poor | DNA/NA* | Total |
| Aviation/Aerospace | 1 | 7 | 1 | 1 | 0 | 10 |
| Financial Services | 23 | 26 | 2 | 0 | 2 | 53 |
| High Tech Industries | 26 | 58 | 20 | 2 | 2 | 108 |
| Information Technology | 15 | 29 | 11 | 1 | 0 | 56 |
| Marine Science | 27 | 39 | 15 | 6 | 2 | 89 |
| Medical Technology | 8 | 18 | 9 | 2 | 0 | 37 |
| Microelectronics | 17 | 28 | 10 | 1 | 1 | 57 |
| Modeling/Simulation | 2 | 7 | 1 | 0 | 0 | 10 |
| Optics/Photonics | 0 | 2 | 2 | 0 | 0 | 4 |
| Research/Development | 15 | 22 | 10 | 0 | 1 | 48 |
| Wireless Technology | 1 | 4 | 1 | 0 | 0 | 6 |
| All Target Industries | 89 | 156 | 49 | 10 | 5 | 309 |

* Did Not Answer/Not Applicable

Target Employment and Industrial Land Study for the Pinellas Community

C. Condition of Building/Site

| Question 10C | | | | | | |
|------------------------------|-----------|------------|-----------|-----------|----------|------------|
| Target Industry Cluster | Excellent | Good | Fair | Poor | DNA/NA * | Total |
| Aviation/Aerospace | 3 | 3 | 3 | 1 | 0 | 10 |
| Financial Services | 22 | 19 | 8 | 4 | 0 | 53 |
| High Tech Industries | 29 | 59 | 17 | 1 | 2 | 108 |
| Information Technology | 13 | 30 | 12 | 1 | 0 | 56 |
| Marine Science | 21 | 37 | 23 | 5 | 3 | 89 |
| Medical Technology | 9 | 19 | 7 | 2 | 0 | 37 |
| Microelectronics | 11 | 32 | 11 | 2 | 1 | 57 |
| Modeling/Simulation | 3 | 7 | 0 | 0 | 0 | 10 |
| Optics/Photonics | 0 | 2 | 1 | 1 | 0 | 4 |
| Research/Development | 17 | 23 | 6 | 1 | 1 | 48 |
| Wireless Technology | 0 | 5 | 0 | 1 | 0 | 6 |
| All Target Industries | 86 | 145 | 60 | 14 | 4 | 309 |

* Did Not Answer/Not Applicable

D. Access To Seaport

| Question 10D | | | | | | |
|------------------------------|-----------|-----------|-----------|----------|------------|------------|
| Target Industry Cluster | Excellent | Good | Fair | Poor | DNA/NA * | Total |
| Aviation/Aerospace | 0 | 1 | 0 | 0 | 9 | 10 |
| Financial Services | 5 | 3 | 2 | 0 | 43 | 53 |
| High Tech Industries | 2 | 12 | 7 | 4 | 83 | 108 |
| Information Technology | 2 | 6 | 4 | 2 | 42 | 56 |
| Marine Science | 10 | 16 | 6 | 2 | 55 | 89 |
| Medical Technology | 2 | 4 | 3 | 3 | 25 | 37 |
| Microelectronics | 2 | 5 | 3 | 3 | 44 | 57 |
| Modeling/Simulation | 0 | 3 | 2 | 0 | 5 | 10 |
| Optics/Photonics | 0 | 0 | 0 | 0 | 4 | 4 |
| Research/Development | 1 | 2 | 2 | 1 | 42 | 48 |
| Wireless Technology | 0 | 2 | 1 | 0 | 3 | 6 |
| All Target Industries | 21 | 38 | 22 | 8 | 220 | 309 |

* Did Not Answer/Not Applicable

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E. Cost of Site

| Question 10E | | | | | | |
|------------------------------|-----------|------------|-----------|-----------|-----------|------------|
| Target Industry Cluster | Excellent | Good | Fair | Poor | DNA/NA* | Total |
| Aviation/Aerospace | 0 | 7 | 2 | 0 | 1 | 10 |
| Financial Services | 9 | 20 | 12 | 4 | 8 | 53 |
| High Tech Industries | 15 | 45 | 34 | 2 | 12 | 108 |
| Information Technology | 10 | 25 | 14 | 2 | 5 | 56 |
| Marine Science | 13 | 30 | 26 | 9 | 11 | 89 |
| Medical Technology | 3 | 14 | 12 | 4 | 4 | 37 |
| Microelectronics | 8 | 26 | 14 | 1 | 8 | 57 |
| Modeling/Simulation | 0 | 5 | 3 | 0 | 2 | 10 |
| Optics/Photonics | 0 | 2 | 1 | 0 | 1 | 4 |
| Research/Development | 8 | 19 | 14 | 2 | 5 | 48 |
| Wireless Technology | 0 | 1 | 4 | 0 | 1 | 6 |
| All Target Industries | 44 | 123 | 86 | 20 | 36 | 309 |

* Did Not Answer/Not Applicable

F. Parking Availability

| Question 10F | | | | | | |
|------------------------------|-----------|------------|-----------|-----------|-----------|------------|
| Target Industry Cluster | Excellent | Good | Fair | Poor | DNA/NA* | Total |
| Aviation/Aerospace | 1 | 4 | 4 | 0 | 1 | 10 |
| Financial Services | 17 | 23 | 9 | 2 | 2 | 53 |
| High Tech Industries | 26 | 47 | 27 | 5 | 3 | 108 |
| Information Technology | 14 | 25 | 12 | 5 | 0 | 56 |
| Marine Science | 20 | 39 | 18 | 8 | 4 | 89 |
| Medical Technology | 8 | 18 | 8 | 1 | 2 | 37 |
| Microelectronics | 15 | 24 | 14 | 3 | 1 | 57 |
| Modeling/Simulation | 2 | 5 | 2 | 0 | 1 | 10 |
| Optics/Photonics | 0 | 3 | 1 | 0 | 0 | 4 |
| Research/Development | 16 | 18 | 10 | 4 | 0 | 48 |
| Wireless Technology | 1 | 3 | 1 | 0 | 1 | 6 |
| All Target Industries | 77 | 136 | 66 | 20 | 10 | 309 |

* Did Not Answer/Not Applicable

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G. Proximity to Customers

| Question 10G | | | | | | |
|------------------------------|-----------|------------|-----------|----------|-----------|------------|
| Target Industry Cluster | Excellent | Good | Fair | Poor | DNA/NA* | Total |
| Aviation/Aerospace | 1 | 4 | 2 | 0 | 3 | 10 |
| Financial Services | 21 | 16 | 4 | 0 | 12 | 53 |
| High Tech Industries | 12 | 40 | 14 | 2 | 40 | 108 |
| Information Technology | 5 | 17 | 7 | 2 | 25 | 56 |
| Marine Science | 25 | 38 | 11 | 1 | 14 | 89 |
| Medical Technology | 4 | 9 | 6 | 1 | 17 | 37 |
| Microelectronics | 9 | 19 | 7 | 2 | 20 | 57 |
| Modeling/Simulation | 0 | 5 | 2 | 0 | 3 | 10 |
| Optics/Photonics | 0 | 3 | 0 | 0 | 1 | 4 |
| Research/Development | 8 | 22 | 3 | 0 | 15 | 48 |
| Wireless Technology | 0 | 3 | 1 | 1 | 1 | 6 |
| All Target Industries | 63 | 116 | 38 | 4 | 88 | 309 |

* Did Not Answer/Not Applicable

H. Proximity To Suppliers:

| Question 10H | | | | | | |
|------------------------------|-----------|------------|-----------|----------|------------|------------|
| Target Industry Cluster | Excellent | Good | Fair | Poor | DNA/NA* | Total |
| Aviation/Aerospace | 1 | 6 | 2 | 0 | 1 | 10 |
| Financial Services | 14 | 12 | 3 | 0 | 24 | 53 |
| High Tech Industries | 7 | 35 | 18 | 2 | 46 | 108 |
| Information Technology | 4 | 15 | 8 | 2 | 27 | 56 |
| Marine Science | 17 | 35 | 14 | 0 | 23 | 89 |
| Medical Technology | 3 | 14 | 7 | 2 | 11 | 37 |
| Microelectronics | 7 | 15 | 7 | 3 | 25 | 57 |
| Modeling/Simulation | 0 | 4 | 2 | 1 | 3 | 10 |
| Optics/Photonics | 0 | 3 | 0 | 0 | 1 | 4 |
| Research/Development | 6 | 18 | 2 | 0 | 22 | 48 |
| Wireless Technology | 0 | 1 | 2 | 0 | 3 | 6 |
| All Target Industries | 44 | 106 | 43 | 5 | 111 | 309 |

* Did Not Answer/Not Applicable

Target Employment and Industrial Land Study for the Pinellas Community

I. Proximity to Similar or Related Businesses

| Question 10I | | | | | | |
|------------------------------|-----------|-----------|-----------|-----------|------------|------------|
| Target Industry Cluster | Excellent | Good | Fair | Poor | DNA/NA* | Total |
| Aviation/Aerospace | 1 | 5 | 0 | 0 | 4 | 10 |
| Financial Services | 9 | 14 | 4 | 0 | 26 | 53 |
| High Tech Industries | 7 | 21 | 9 | 6 | 65 | 108 |
| Information Technology | 1 | 10 | 8 | 4 | 33 | 56 |
| Marine Science | 15 | 28 | 8 | 2 | 36 | 89 |
| Medical Technology | 4 | 7 | 6 | 2 | 18 | 37 |
| Microelectronics | 4 | 10 | 4 | 6 | 33 | 57 |
| Modeling/Simulation | 0 | 2 | 1 | 1 | 6 | 10 |
| Optics/Photonics | 0 | 3 | 0 | 0 | 1 | 4 |
| Research/Development | 6 | 16 | 1 | 2 | 23 | 48 |
| Wireless Technology | 0 | 1 | 1 | 1 | 3 | 6 |
| All Target Industries | 35 | 86 | 29 | 10 | 149 | 309 |

* Did Not Answer/Not Applicable

J. Public Transit Availability

| Question 10J | | | | | | |
|------------------------------|-----------|-----------|-----------|-----------|-----------|------------|
| Target Industry Cluster | Excellent | Good | Fair | Poor | DNA/NA* | Total |
| Aviation/Aerospace | 1 | 4 | 2 | 1 | 2 | 10 |
| Financial Services | 11 | 15 | 8 | 2 | 17 | 53 |
| High Tech Industries | 12 | 28 | 14 | 16 | 38 | 108 |
| Information Technology | 9 | 15 | 8 | 7 | 17 | 56 |
| Marine Science | 15 | 27 | 17 | 8 | 22 | 89 |
| Medical Technology | 5 | 7 | 5 | 8 | 12 | 37 |
| Microelectronics | 8 | 13 | 5 | 10 | 21 | 57 |
| Modeling/Simulation | 0 | 4 | 2 | 1 | 3 | 10 |
| Optics/Photonics | 1 | 1 | 0 | 0 | 2 | 4 |
| Research/Development | 8 | 7 | 9 | 5 | 19 | 48 |
| Wireless Technology | 0 | 3 | 0 | 1 | 2 | 6 |
| All Target Industries | 49 | 81 | 55 | 31 | 93 | 309 |

* Did Not Answer/Not Applicable

Target Employment and Industrial Land Study for the Pinellas Community

11. Does the nature of your business require:

- ☐ Industrial-type zoning/land use designation (e.g., manufacturing, warehousing)?
- ☐ Commercial-type zoning/land use designation (e.g., office space, retail)?
- ☐ Both of the above
- ☐ Neither of the above

Almost half (45 percent) of responding businesses stated that they require commercial zoning only, with another eighteen percent requiring both commercial and industrial zoning to accommodate their operations. Only seventeen percent require industrial zoning alone. Eighteen percent reported that they need neither commercial nor industrial zoning. Aviation/Aerospace, Modeling/Simulation, and Optics/Photonics businesses are all heavily dependent on industrial zoning.

| Question 11 | | | | | | |
|------------------------------|------------|------------|-----------|-----------|----------|------------|
| Target Industry Cluster | Commercial | Industrial | Both | Neither | DNA/NA* | Total |
| Aviation/Aerospace | 0 | 6 | 3 | 1 | 0 | 10 |
| Financial Services | 33 | 3 | 4 | 12 | 1 | 53 |
| High Tech Industries | 50 | 20 | 21 | 17 | 0 | 108 |
| Information Technology | 33 | 6 | 6 | 11 | 0 | 56 |
| Marine Science | 37 | 17 | 20 | 15 | 0 | 89 |
| Medical Technology | 5 | 16 | 8 | 7 | 1 | 37 |
| Microelectronics | 34 | 7 | 8 | 8 | 0 | 57 |
| Modeling/Simulation | 0 | 3 | 5 | 2 | 0 | 10 |
| Optics/Photonics | 0 | 2 | 0 | 2 | 0 | 4 |
| Research/Development | 28 | 1 | 6 | 13 | 0 | 48 |
| Wireless Technology | 1 | 0 | 2 | 3 | 0 | 6 |
| All Target Industries | 140 | 57 | 53 | 57 | 2 | 309 |

* Did Not Answer/Not Applicable

12. Are there physical constraints that restrict your business operations at your current location?

- ☐ Yes ☐ No If so, what are they?
- ☐ Proximity to residential development restricts our business activities
- ☐ Business facilities and/or activities are restricted
- ☐ Environmental conditions or limitations
- ☐ Other: _____

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About 80 percent of respondents reported having no physical constraints on their operations at their current locations, either from residential development, environmental issues, or other factors. For the twenty percent that did report such constraints, there was no strong pattern to the results. A number of respondents wrote individualized comments under the “other” category, which were grouped under the general headings of site constraints, government regulations, and transportation constraints.

| Question 12 Target Industry Cluster | Proximity to Residential | Business Restricted | Environmental Condition | Site Constraints | Transportation Constraints | Government Regulations | | | | |
|--|--------------------------|---------------------|-------------------------|------------------|----------------------------|------------------------|----------|------------|----------|------------|
| | | | | | | | Other | None | DNA/NA* | Total |
| Aviation/Aerospace | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 8 | 0 | 10 |
| Financial Services | 0 | 1 | 0 | 2 | 1 | 0 | 0 | 49 | 0 | 53 |
| High Tech Industries | 3 | 1 | 0 | 9 | 1 | 1 | 1 | 92 | 0 | 108 |
| Information Technology | 1 | 1 | 0 | 6 | 1 | 2 | 1 | 43 | 1 | 56 |
| Marine Science | 8 | 7 | 4 | 4 | 1 | 0 | 3 | 62 | 0 | 89 |
| Medical Technology | 1 | 0 | 0 | 4 | 1 | 0 | 0 | 29 | 2 | 37 |
| Microelectronics | 1 | 1 | 1 | 4 | 1 | 1 | 0 | 48 | 0 | 57 |
| Modeling/Simulation | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 9 | 0 | 10 |
| Optics/Photonics | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 4 | 0 | 4 |
| Research/Development | 1 | 0 | 1 | 3 | 0 | 0 | 0 | 43 | 0 | 48 |
| Wireless Technology | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 6 | 0 | 6 |
| All Target Industries | 13 | 10 | 5 | 21 | 4 | 2 | 5 | 246 | 3 | 309 |

* Did Not Answer/Not Applicable

13. Have zoning, land use, or regulatory changes on properties near or abutting your location negatively affected your operations?

- ☐ Yes ☐ No If so, how?
☐ Can't expand because of new regulations affecting your property
☐ Residential development was permitted close to our property
☐ Other: _____

As with Question 12 above, the vast majority of respondents (88 percent) reported having no zoning or land use issues originating from near or abutting properties. The twelve percent who reported these issues again included many individual comments, which were grouped into site issues, taxes/costs, and transportation issues.

Target Employment and Industrial Land Study for the Pinellas Community

| Question 13 Target Industry Cluster | New Regulations | Residential Permitted | Site Issues | Taxes/ Costs | Transportation Issues | Other | None | DNA/ NA* | Total |
|--|-----------------|-----------------------|-------------|-----------------|-----------------------|----------|------------|-------------|------------|
| Aviation/Aerospace | 1 | 0 | 0 | 0 | 0 | 0 | 9 | 0 | 10 |
| Financial Services | 1 | 0 | 2 | 0 | 1 | 0 | 47 | 2 | 53 |
| High Tech Industries | 2 | 2 | 2 | 0 | 0 | 2 | 98 | 2 | 108 |
| Information Technology | 0 | 1 | 0 | 1 | 0 | 1 | 53 | 0 | 56 |
| Marine Science | 7 | 4 | 3 | 1 | 0 | 2 | 71 | 1 | 89 |
| Medical Technology | 2 | 2 | 0 | 0 | 0 | 0 | 31 | 2 | 37 |
| Microelectronics | 1 | 1 | 0 | 0 | 0 | 1 | 54 | 0 | 57 |
| Modeling/Simulation | 0 | 0 | 1 | 0 | 0 | 0 | 9 | 0 | 10 |
| Optics/Photonics | 0 | 0 | 0 | 0 | 0 | 0 | 4 | 0 | 4 |
| Research/Development | 1 | 1 | 1 | 1 | 1 | 1 | 42 | 0 | 48 |
| Wireless Technology | 0 | 0 | 0 | 0 | 0 | 0 | 6 | 0 | 6 |
| All Target Industries | 12 | 8 | 7 | 3 | 2 | 4 | 267 | 6 | 309 |

* Did Not Answer/Not Applicable

14. Do you have sufficient space to expand at your current location? Choose all that apply.

- ☐ Yes, we have sufficient space available for expansion
- ☐ Yes, government regulations permit expansion
- ☐ No, we do not have sufficient space available for expansion
- ☐ No, government regulations do not permit expansion
- ☐ Other: _____

Nearly half of all respondents (48 percent) claimed to have sufficient space to expand, while a slightly lower percentage (44 percent) reported that they did not. Few included information about their regulatory ability to expand, suggesting that most did not know this information. Six percent of respondents stated that government regulations do not permit expansion at their sites, while the same percentage reported that expansion was permitted.

Target Employment and Industrial Land Study for the Pinellas Community

| Question 14A | | | | |
|--------------------------------|-------------------------|---------------------------|----------------|--------------|
| Target Industry Cluster | Sufficient Space | Insufficient Space | DNA/NA* | Total |
| Aviation/Aerospace | 5 | 5 | 0 | 10 |
| Financial Services | 32 | 16 | 5 | 53 |
| High Tech Industries | 58 | 43 | 7 | 108 |
| Information Technology | 25 | 26 | 5 | 56 |
| Marine Science | 37 | 44 | 8 | 89 |
| Medical Technology | 14 | 19 | 4 | 37 |
| Microelectronics | 28 | 25 | 4 | 57 |
| Modeling/Simulation | 6 | 4 | 0 | 10 |
| Optics/Photonics | 1 | 2 | 1 | 4 |
| Research/Development | 24 | 21 | 3 | 48 |
| Wireless Technology | 4 | 1 | 1 | 6 |
| All Target Industries | 148 | 136 | 25 | 309 |

* Did Not Answer/Not Applicable

| Question 14B | | | | |
|--------------------------------|------------------|----------------------|----------------|--------------|
| Target Industry Cluster | Permitted | Not Permitted | DNA/NA* | Total |
| Aviation/Aerospace | 1 | 0 | 9 | 10 |
| Financial Services | 0 | 2 | 51 | 53 |
| High Tech Industries | 10 | 4 | 94 | 108 |
| Information Technology | 3 | 1 | 52 | 56 |
| Marine Science | 7 | 10 | 72 | 89 |
| Medical Technology | 2 | 2 | 33 | 37 |
| Microelectronics | 4 | 1 | 52 | 57 |
| Modeling/Simulation | 0 | 0 | 10 | 10 |
| Optics/Photonics | 0 | 0 | 4 | 4 |
| Research/Development | 4 | 2 | 42 | 48 |
| Wireless Technology | 1 | 0 | 5 | 6 |
| All Target Industries | 18 | 19 | 272 | 309 |

* Did Not Answer/Not Applicable

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15. How are your site requirements likely to change over the next 5 years? Choose all that apply.

- ☐ We will need more building space
- ☐ We will need less building space
- ☐ We expect to relocate to a new site
- ☐ We expect to open a new site or sites in addition to our current one(s)
- ☐ We expect to consolidate a number of sites onto one existing site
- ☐ We expect to consolidate a number of sites onto a new site
- ☐ Other: _____

Thirty-eight percent of respondents reported that they would need more space within the next five years. Twenty-five percent reported that they expected to relocate within the next five years. Twenty percent anticipated no change. Ten percent expected to open a new site. Five percent expected to require less space, and a total of three percent expected to consolidate new and/or existing operations.

| Question 15 | | | | | | | |
|------------------------------|------------|------------|-----------|-----------|----------------------|-----------------|-----------|
| Target Industry Cluster | More Space | Less Space | Relocate | Open New | Consolidate Existing | Consolidate New | No Change |
| Aviation/Aerospace | 5 | 0 | 3 | 1 | 1 | 0 | 0 |
| Financial Services | 23 | 2 | 11 | 7 | 1 | 1 | 12 |
| High Tech Industries | 46 | 8 | 28 | 23 | 1 | 3 | 23 |
| Information Technology | 31 | 5 | 25 | 11 | 1 | 2 | 7 |
| Marine Science | 36 | 3 | 21 | 9 | 1 | 0 | 22 |
| Medical Technology | 18 | 2 | 6 | 5 | 0 | 1 | 8 |
| Microelectronics | 28 | 5 | 22 | 14 | 2 | 1 | 12 |
| Modeling/Simulation | 2 | 0 | 1 | 0 | 1 | 0 | 2 |
| Optics/Photonics | 1 | 0 | 0 | 0 | 0 | 0 | 1 |
| Research/Development | 18 | 3 | 13 | 9 | 1 | 1 | 13 |
| Wireless Technology | 1 | 0 | 0 | 1 | 0 | 0 | 1 |
| All Target Industries | 117 | 16 | 77 | 31 | 6 | 3 | 62 |

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16. If you are searching for a new site, what kind of site would you consider?
Choose all that apply.

- ☐ A newly-constructed site/custom construction
- ☐ An existing, previously-developed site
- ☐ A downtown urban site
- ☐ An industrial or business park
- ☐ A specialized Research/Development and development park
- ☐ Small-scale start-up space/business incubator
- ☐ A live/work unit/home office
- ☐ Other: _____

A majority (54 percent) of respondents reported that they would consider moving into an existing, previously-developed site. A large proportion (38 percent) reported that they would consider a newly-constructed site. Twenty-nine percent stated that they would be willing to move to an industrial or business park, and eleven percent were willing to relocate to a downtown. Smaller percentages reported that they would be interested in live/work space (eight percent), a research/development park (seven percent), or business incubator space (five percent).

| Question 16 Target Industry Cluster | New Site | Existing Site | Downtown Site | Industrial/ Business Park | Research/ Dev. Park | Small Scale/ Incubator | Live/Work/ Home | Not Looking or Unsure | Other |
|--|------------|---------------|---------------|------------------------------|------------------------|---------------------------|--------------------|-----------------------------|-----------|
| Aviation/Aerospace | 6 | 4 | 1 | 2 | 0 | 0 | 0 | 0 | 0 |
| Financial Services | 18 | 24 | 4 | 10 | 2 | 2 | 1 | 7 | 1 |
| High Tech Industries | 34 | 50 | 9 | 29 | 10 | 2 | 1 | 8 | 6 |
| Information Technology | 21 | 35 | 6 | 18 | 4 | 2 | 2 | 1 | 2 |
| Marine Science | 16 | 34 | 5 | 18 | 3 | 2 | | 6 | 6 |
| Medical Technology | 16 | 13 | 2 | 16 | 2 | | | 2 | 4 |
| Microelectronics | 22 | 31 | 7 | 18 | 6 | 2 | 1 | 2 | 2 |
| Modeling/Simulation | 1 | 2 | 0 | 2 | 0 | 0 | 0 | 1 | 1 |
| Optics/Photonics | 0 | 1 | 0 | 1 | 0 | 0 | 0 | 1 | 1 |
| Research/Development | 20 | 24 | 8 | 13 | 7 | 1 | 1 | 5 | 2 |
| Wireless Technology | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| All Target Industries | 117 | 167 | 34 | 91 | 21 | 15 | 25 | 31 | 20 |

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17. Where will you be looking for a new site? Choose all that apply.

- ☐ Close to our current location in Pinellas County
- ☐ In another area of Pinellas County
- ☐ Outside Pinellas County, but within the Tampa Bay region
- ☐ Outside the Tampa Bay region, but inside Florida
- ☐ Outside of Florida
- ☐ Outside of the United States

Fifty-one percent of respondents stated that they would look close their current site within Pinellas County, and the next highest percentage (21 percent) stated that they would look elsewhere within the county. Seventeen percent would be willing to look outside the county; nine percent would look outside Florida but within the United States; five percent would look inside Florida but outside of Tampa Bay; and less than one percent would be willing to consider moving outside the United States. Thirty-two percent of respondents did not provide any information about potential locations they would consider.

| Question 17 | | | | | | |
|--------------------------------|----------------------------------|-----------------------------|-------------------------------------|--------------------------------------|---------------------------------|---------------------|
| Target Industry Cluster | Close to Current Location | Other Area in County | Outside County, in Tampa Bay | Outside Tampa Bay, in Florida | Outside Florida, in U.S. | Outside U.S. |
| Aviation/Aerospace | 6 | 2 | 4 | 0 | 0 | 0 |
| Financial Services | 29 | 8 | 6 | 2 | 5 | 0 |
| High Tech Industries | 55 | 24 | 15 | 4 | 9 | 1 |
| Information Technology | 41 | 9 | 4 | 0 | 5 | 0 |
| Marine Science | 28 | 20 | 18 | 7 | 6 | 0 |
| Medical Technology | 22 | 8 | 8 | 4 | 8 | 2 |
| Microelectronics | 39 | 14 | 7 | 0 | 3 | 0 |
| Modeling/Simulation | 4 | 0 | 1 | 0 | 0 | 0 |
| Optics/Photonics | 2 | 0 | 0 | 0 | 0 | 0 |
| Research/Development | 28 | 16 | 11 | 4 | 5 | 0 |
| Wireless Technology | 2 | 1 | 0 | 0 | 0 | 0 |
| All Target Industries | 157 | 64 | 52 | 16 | 28 | 2 |

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18. What would the main type of activity be at your new location? Choose only one.

- ☐ **Production**
- ☐ **Storage or distribution**
- ☐ **Office**
- ☐ **Retail**
- ☐ **Laboratory/R&D**
- ☐ **Other:** _____

Forty-two percent of respondents, when asked to choose a single activity that their business would engage in at a new site, stated that they would require office-type uses. Seventeen percent would require production facilities, followed by retail (seven percent), storage/ distribution (five percent), and laboratory/research activities (three percent). Twenty-five percent did not state a primary activity.

Similar to previous statistics on building space use, Aviation/Aerospace, Medical Technology, Modeling/Simulation, and Optics/Photonics businesses were most likely to report that their new space would be used for production purposes.

| Question 18 | | | | | | | |
|--------------------------------|-------------------|---------------|--------------------------------|---------------------|---------------|-----------------|--------------|
| Target Industry Cluster | Production | Office | Storage or Distribution | Lab/ R&D | Retail | DNA/NA * | Total |
| Aviation/Aerospace | 5 | 0 | 2 | 0 | 1 | 2 | 10 |
| Financial Services | 2 | 35 | 1 | 1 | 5 | 9 | 53 |
| High Tech Industries | 20 | 46 | 2 | 8 | 3 | 29 | 108 |
| Information Technology | 6 | 33 | 6 | 1 | 2 | 8 | 56 |
| Marine Science | 16 | 26 | 6 | 1 | 10 | 30 | 89 |
| Medical Technology | 16 | 6 | 1 | 4 | 2 | 8 | 37 |
| Microelectronics | 8 | 35 | 3 | 2 | 0 | 9 | 57 |
| Modeling/Simulation | 3 | 1 | 0 | 0 | 0 | 6 | 10 |
| Optics/Photonics | 2 | 1 | 0 | 0 | 0 | 1 | 4 |
| Research/Development | 4 | 28 | 0 | 3 | 2 | 11 | 48 |
| Wireless Technology | 1 | 2 | 0 | 1 | 0 | 2 | 6 |
| All Target Industries | 52 | 129 | 16 | 12 | 22 | 78 | 309 |

* Did Not Answer/Not Applicable

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19. Please rate the quality of each of the following factors as they relate to your business. Then check off the five factors most important to you from all of those listed that have the greatest impact on your business.

| Land | Excellent | Good | Fair | Poor | Does Not Apply | 5 Most Important Factors |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|--------------------------|
| Availability of appropriate sites within the county | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Cost of sites within the county | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Quality of sites available within the county | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Ability to expand in the future without relocating | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Transportation | | | | | | |
| Access to an airport | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Access to the interstate highway network | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Access to a railroad line | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Access to a seaport or marine facility | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Workforce | | | | | | |
| Availability in the area of adequate skilled labor | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Housing and other living costs for workers | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Availability of public transit | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Business environment | | | | | | |
| Proximity to customers | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Proximity to suppliers | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Proximity to similar or related businesses | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Proximity to higher education institution(s) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Cost of doing business | | | | | | |
| Government regulation and taxes | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Cost of flood and wind insurance | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Labor costs | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| Cost of workman's compensation insurance | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |

The survey asked recipients to rank various physical and socioeconomic features of Pinellas County on the basis of quality, and separately, on their importance to businesses. The responses are an indication of the strengths and weaknesses of the countywide business environment, which can be used to guide future planning and economic development efforts.

Target Employment and Industrial Land Study for the Pinellas Community

The factors ranked highest in quality, defined as those receiving the largest percentages of “excellent” and “good” responses, included access to the interstate highway network (66 percent), access to an airport (62 percent), proximity to customers (50 percent), and proximity to higher education institutions (45 percent).

The factors ranked lowest in quality, or those receiving the largest percentages of “fair” and “poor” responses, included the cost of flood and wind insurance (78 percent), government regulation and taxes (67 percent), cost of workman’s compensation insurance (67 percent), and cost of land within the county (58 percent).

Irrespective of the quality rankings, the factors ranked as most important by the largest percentages of respondents included the availability of skilled labor (53 percent), the cost of flood and wind insurance (42 percent), government regulation and taxes (40 percent), and the cost of land (37 percent). These responses are cause for concern, since two of the factors considered most important to businesses were also ranked lowest in quality.

The next few pages contain tables and figures that split out each cluster’s answers for each of the factors listed above.

Land: Availability of appropriate sites within the county

| Question 19A | | | | | | |
|------------------------------|-----------|-----------|-----------|-----------|-----------|------------|
| Target Industry Cluster | Excellent | Good | Fair | Poor | DNA/NA* | Total |
| Aviation/Aerospace | 1 | 2 | 7 | 0 | 0 | 10 |
| Financial Services | 7 | 22 | 11 | 2 | 11 | 53 |
| High Tech Industries | 13 | 33 | 35 | 12 | 15 | 108 |
| Information Technology | 5 | 22 | 14 | 7 | 8 | 56 |
| Marine Science | 6 | 19 | 20 | 19 | 25 | 89 |
| Medical Technology | 1 | 8 | 12 | 8 | 8 | 37 |
| Microelectronics | 6 | 21 | 14 | 7 | 9 | 57 |
| Modeling/Simulation | 0 | 4 | 4 | 0 | 2 | 10 |
| Optics/Photonics | 0 | 1 | 1 | 0 | 2 | 4 |
| Research/Development | 8 | 19 | 15 | 2 | 4 | 48 |
| Wireless Technology | 0 | 2 | 1 | 0 | 3 | 6 |
| All Target Industries | 30 | 97 | 82 | 41 | 59 | 309 |

* Did Not Answer/Not Applicable

Target Employment and Industrial Land Study for the Pinellas Community

Land: Cost of sites within the county

| Question 19B | | | | | | |
|------------------------------|-----------|-----------|------------|-----------|-----------|------------|
| Target Industry Cluster | Excellent | Good | Fair | Poor | DNA/NA* | Total |
| Aviation/Aerospace | 2 | 2 | 2 | 4 | 0 | 10 |
| Financial Services | 2 | 12 | 24 | 5 | 10 | 53 |
| High Tech Industries | 7 | 19 | 40 | 25 | 17 | 108 |
| Information Technology | 1 | 15 | 23 | 11 | 6 | 56 |
| Marine Science | 3 | 9 | 24 | 31 | 22 | 89 |
| Medical Technology | 1 | 6 | 14 | 7 | 9 | 37 |
| Microelectronics | 1 | 13 | 22 | 12 | 9 | 57 |
| Modeling/Simulation | 0 | 2 | 5 | 0 | 3 | 10 |
| Optics/Photonics | 0 | 1 | 1 | 0 | 2 | 4 |
| Research/Development | 6 | 11 | 16 | 10 | 5 | 48 |
| Wireless Technology | 0 | 0 | 3 | 0 | 3 | 6 |
| All Target Industries | 15 | 57 | 105 | 74 | 58 | 309 |

* Did Not Answer/Not Applicable

Land: Quality of sites available within the county

| Question 19C | | | | | | |
|------------------------------|-----------|------------|-----------|-----------|-----------|------------|
| Target Industry Cluster | Excellent | Good | Fair | Poor | DNA/NA* | Total |
| Aviation/Aerospace | 0 | 5 | 4 | 1 | 0 | 10 |
| Financial Services | 5 | 19 | 15 | 2 | 12 | 53 |
| High Tech Industries | 8 | 38 | 35 | 8 | 19 | 108 |
| Information Technology | 2 | 25 | 18 | 4 | 7 | 56 |
| Marine Science | 2 | 21 | 29 | 13 | 24 | 89 |
| Medical Technology | 2 | 9 | 14 | 4 | 8 | 37 |
| Microelectronics | 2 | 23 | 20 | 4 | 8 | 57 |
| Modeling/Simulation | 0 | 4 | 4 | 0 | 2 | 10 |
| Optics/Photonics | 0 | 1 | 1 | 0 | 2 | 4 |
| Research/Development | 5 | 21 | 11 | 3 | 8 | 48 |
| Wireless Technology | 0 | 0 | 3 | 0 | 3 | 6 |
| All Target Industries | 16 | 107 | 93 | 28 | 65 | 309 |

* Did Not Answer/Not Applicable

Target Employment and Industrial Land Study for the Pinellas Community

Land: Ability to expand in the future without relocating

| Question 19D | | | | | | |
|------------------------------|-----------|-----------|-----------|-----------|-----------|------------|
| Target Industry Cluster | Excellent | Good | Fair | Poor | DNA/NA* | Total |
| Aviation/Aerospace | 2 | 0 | 5 | 3 | 0 | 10 |
| Financial Services | 4 | 18 | 14 | 6 | 11 | 53 |
| High Tech Industries | 12 | 34 | 24 | 24 | 14 | 108 |
| Information Technology | 5 | 20 | 10 | 15 | 6 | 56 |
| Marine Science | 4 | 17 | 13 | 33 | 22 | 89 |
| Medical Technology | 2 | 8 | 8 | 10 | 9 | 37 |
| Microelectronics | 4 | 20 | 10 | 16 | 7 | 57 |
| Modeling/Simulation | 1 | 2 | 2 | 3 | 2 | 10 |
| Optics/Photonics | 0 | 1 | 0 | 0 | 3 | 4 |
| Research/Development | 6 | 19 | 9 | 9 | 5 | 48 |
| Wireless Technology | 0 | 2 | 0 | 0 | 4 | 6 |
| All Target Industries | 26 | 81 | 63 | 82 | 57 | 309 |

* Did Not Answer/Not Applicable

Transportation: Access to an airport

| Question 19E | | | | | | |
|------------------------------|-----------|------------|-----------|----------|-----------|------------|
| Target Industry Cluster | Excellent | Good | Fair | Poor | DNA/NA* | Total |
| Aviation/Aerospace | 1 | 6 | 1 | 0 | 2 | 10 |
| Financial Services | 11 | 24 | 5 | 0 | 13 | 53 |
| High Tech Industries | 32 | 42 | 6 | 0 | 28 | 108 |
| Information Technology | 13 | 21 | 3 | 2 | 17 | 56 |
| Marine Science | 17 | 29 | 4 | 0 | 39 | 89 |
| Medical Technology | 11 | 13 | 2 | 0 | 11 | 37 |
| Microelectronics | 20 | 19 | 2 | 0 | 16 | 57 |
| Modeling/Simulation | 0 | 6 | 2 | 0 | 2 | 10 |
| Optics/Photonics | 0 | 1 | 0 | 0 | 3 | 4 |
| Research/Development | 16 | 22 | 3 | 1 | 6 | 48 |
| Wireless Technology | 0 | 3 | 0 | 0 | 3 | 6 |
| All Target Industries | 65 | 128 | 19 | 3 | 94 | 309 |

* Did Not Answer/Not Applicable

Target Employment and Industrial Land Study for the Pinellas Community

Transportation: Access to the interstate highway network

| Question 19F | | | | | | |
|------------------------------|-----------|------------|-----------|-----------|-----------|------------|
| Target Industry Cluster | Excellent | Good | Fair | Poor | DNA/NA* | Total |
| Aviation/Aerospace | 1 | 6 | 2 | 0 | 1 | 10 |
| Financial Services | 18 | 18 | 6 | 3 | 8 | 53 |
| High Tech Industries | 37 | 42 | 9 | 6 | 14 | 108 |
| Information Technology | 17 | 19 | 7 | 2 | 11 | 56 |
| Marine Science | 24 | 31 | 5 | 3 | 26 | 89 |
| Medical Technology | 10 | 14 | 4 | 1 | 8 | 37 |
| Microelectronics | 21 | 20 | 6 | 3 | 7 | 57 |
| Modeling/Simulation | 1 | 5 | 1 | 1 | 2 | 10 |
| Optics/Photonics | 0 | 1 | 0 | 1 | 2 | 4 |
| Research/Development | 18 | 16 | 6 | 2 | 6 | 48 |
| Wireless Technology | 0 | 2 | 1 | 1 | 2 | 6 |
| All Target Industries | 88 | 115 | 31 | 12 | 63 | 309 |

* Did Not Answer/Not Applicable

Transportation: Access to a railroad line

| Question 19G | | | | | | |
|------------------------------|-----------|-----------|-----------|-----------|------------|------------|
| Target Industry Cluster | Excellent | Good | Fair | Poor | DNA/NA* | Total |
| Aviation/Aerospace | 1 | 1 | 0 | 0 | 8 | 10 |
| Financial Services | 0 | 2 | 1 | 4 | 46 | 53 |
| High Tech Industries | 4 | 6 | 2 | 8 | 88 | 108 |
| Information Technology | 2 | 3 | 3 | 3 | 45 | 56 |
| Marine Science | 1 | 7 | 4 | 6 | 71 | 89 |
| Medical Technology | 0 | 1 | 2 | 6 | 28 | 37 |
| Microelectronics | 3 | 3 | 1 | 4 | 46 | 57 |
| Modeling/Simulation | 0 | 2 | 0 | 2 | 6 | 10 |
| Optics/Photonics | 0 | 0 | 0 | 0 | 4 | 4 |
| Research/Development | 1 | 5 | 0 | 3 | 39 | 48 |
| Wireless Technology | 0 | 0 | 1 | 0 | 5 | 6 |
| All Target Industries | 7 | 22 | 10 | 23 | 247 | 309 |

* Did Not Answer/Not Applicable

Target Employment and Industrial Land Study for the Pinellas Community

Transportation: Access to a seaport or Marine Science facility

| Question 19H | | | | | | |
|------------------------------|-----------|-----------|-----------|----------|------------|------------|
| Target Industry Cluster | Excellent | Good | Fair | Poor | DNA/NA* | Total |
| Aviation/Aerospace | 0 | 1 | 1 | 0 | 8 | 10 |
| Financial Services | 1 | 4 | 3 | 1 | 44 | 53 |
| High Tech Industries | 3 | 10 | 5 | 4 | 86 | 108 |
| Information Technology | 1 | 4 | 3 | 3 | 45 | 56 |
| Marine Science | 8 | 15 | 8 | 3 | 55 | 89 |
| Medical Technology | 1 | 4 | 4 | 1 | 27 | 37 |
| Microelectronics | 2 | 4 | 1 | 4 | 46 | 57 |
| Modeling/Simulation | 0 | 2 | 2 | 0 | 6 | 10 |
| Optics/Photonics | 0 | 0 | 0 | 0 | 4 | 4 |
| Research/Development | 3 | 4 | 1 | 2 | 38 | 48 |
| Wireless Technology | 0 | 1 | 1 | 0 | 4 | 6 |
| All Target Industries | 14 | 35 | 24 | 9 | 227 | 309 |

* Did Not Answer/Not Applicable

Workforce: Availability in the area of adequate skilled labor

| Question 19I | | | | | | |
|------------------------------|-----------|------------|------------|-----------|-----------|------------|
| Target Industry Cluster | Excellent | Good | Fair | Poor | DNA/NA* | Total |
| Aviation/Aerospace | 2 | 1 | 4 | 3 | 0 | 10 |
| Financial Services | 4 | 22 | 16 | 2 | 9 | 53 |
| High Tech Industries | 7 | 37 | 39 | 17 | 8 | 108 |
| Information Technology | 3 | 21 | 17 | 8 | 7 | 56 |
| Marine Science | 7 | 23 | 38 | 9 | 12 | 89 |
| Medical Technology | 1 | 16 | 10 | 6 | 4 | 37 |
| Microelectronics | 5 | 20 | 22 | 7 | 3 | 57 |
| Modeling/Simulation | 0 | 2 | 7 | 1 | 0 | 10 |
| Optics/Photonics | 0 | 3 | 0 | 0 | 1 | 4 |
| Research/Development | 7 | 14 | 15 | 9 | 3 | 48 |
| Wireless Technology | 0 | 3 | 2 | 0 | 1 | 6 |
| All Target Industries | 23 | 100 | 112 | 38 | 36 | 309 |

* Did Not Answer/Not Applicable

Target Employment and Industrial Land Study for the Pinellas Community

Workforce: Housing and other living costs for workers

| Question 19J | | | | | | |
|------------------------------|-----------|-----------|------------|-----------|-----------|------------|
| Target Industry Cluster | Excellent | Good | Fair | Poor | DNA/NA * | Total |
| Aviation/Aerospace | 1 | 1 | 3 | 4 | 1 | 10 |
| Financial Services | 1 | 12 | 16 | 12 | 12 | 53 |
| High Tech Industries | 6 | 19 | 37 | 30 | 16 | 108 |
| Information Technology | 0 | 12 | 28 | 8 | 8 | 56 |
| Marine Science | 1 | 16 | 35 | 21 | 16 | 89 |
| Medical Technology | 3 | 8 | 10 | 12 | 4 | 37 |
| Microelectronics | 1 | 13 | 27 | 10 | 6 | 57 |
| Modeling/Simulation | 0 | 1 | 3 | 4 | 2 | 10 |
| Optics/Photonics | 0 | 2 | 0 | 1 | 1 | 4 |
| Research/Development | 3 | 10 | 16 | 11 | 8 | 48 |
| Wireless Technology | 0 | 0 | 1 | 3 | 2 | 6 |
| All Target Industries | 8 | 58 | 112 | 77 | 54 | 309 |

* Did Not Answer/Not Applicable

Workforce: Availability of public transit

| Question 19K | | | | | | |
|------------------------------|-----------|-----------|-----------|-----------|------------|------------|
| Target Industry Cluster | Excellent | Good | Fair | Poor | DNA/NA * | Total |
| Aviation/Aerospace | 0 | 7 | 1 | 1 | 1 | 10 |
| Financial Services | 6 | 18 | 9 | 3 | 17 | 53 |
| High Tech Industries | 3 | 23 | 19 | 19 | 44 | 108 |
| Information Technology | 4 | 8 | 15 | 8 | 21 | 56 |
| Marine Science | 6 | 24 | 18 | 10 | 31 | 89 |
| Medical Technology | 0 | 8 | 8 | 7 | 14 | 37 |
| Microelectronics | 3 | 9 | 10 | 10 | 25 | 57 |
| Modeling/Simulation | 0 | 3 | 2 | 3 | 2 | 10 |
| Optics/Photonics | 0 | 1 | 1 | 0 | 2 | 4 |
| Research/Development | 2 | 10 | 7 | 10 | 19 | 48 |
| Wireless Technology | 0 | 1 | 2 | 0 | 3 | 6 |
| All Target Industries | 19 | 79 | 65 | 40 | 106 | 309 |

* Did Not Answer/Not Applicable

Target Employment and Industrial Land Study for the Pinellas Community

Business Environment: Proximity to customers

| Question 19L | | | | | | |
|------------------------------|-----------|------------|-----------|----------|------------|------------|
| Target Industry Cluster | Excellent | Good | Fair | Poor | DNA/NA* | Total |
| Aviation/Aerospace | 1 | 2 | 3 | 0 | 4 | 10 |
| Financial Services | 16 | 16 | 3 | 1 | 17 | 53 |
| High Tech Industries | 9 | 33 | 13 | 3 | 50 | 108 |
| Information Technology | 3 | 18 | 4 | 3 | 28 | 56 |
| Marine Science | 17 | 39 | 8 | 2 | 23 | 89 |
| Medical Technology | 1 | 7 | 5 | 1 | 23 | 37 |
| Microelectronics | 7 | 16 | 5 | 2 | 27 | 57 |
| Modeling/Simulation | 0 | 3 | 3 | 0 | 4 | 10 |
| Optics/Photonics | 0 | 3 | 0 | 0 | 1 | 4 |
| Research/Development | 5 | 21 | 4 | 1 | 17 | 48 |
| Wireless Technology | 0 | 2 | 1 | 1 | 2 | 6 |
| All Target Industries | 44 | 111 | 30 | 7 | 117 | 309 |

* Did Not Answer/Not Applicable

Business Environment: Proximity to suppliers

| Question 19M | | | | | | |
|------------------------------|-----------|------------|-----------|----------|------------|------------|
| Target Industry Cluster | Excellent | Good | Fair | Poor | DNA/NA* | Total |
| Aviation/Aerospace | 1 | 4 | 4 | 0 | 1 | 10 |
| Financial Services | 3 | 16 | 4 | 1 | 29 | 53 |
| High Tech Industries | 4 | 31 | 24 | 1 | 48 | 108 |
| Information Technology | 1 | 13 | 9 | 4 | 29 | 56 |
| Marine Science | 11 | 40 | 10 | 2 | 26 | 89 |
| Medical Technology | 0 | 14 | 6 | 2 | 15 | 37 |
| Microelectronics | 4 | 16 | 9 | 2 | 26 | 57 |
| Modeling/Simulation | 0 | 4 | 3 | 0 | 3 | 10 |
| Optics/Photonics | 0 | 3 | 0 | 0 | 1 | 4 |
| Research/Development | 1 | 17 | 6 | 0 | 24 | 48 |
| Wireless Technology | 0 | 2 | 2 | 0 | 2 | 6 |
| All Target Industries | 18 | 111 | 43 | 9 | 128 | 309 |

* Did Not Answer/Not Applicable

Target Employment and Industrial Land Study for the Pinellas Community

Business Environment: Proximity to similar or related businesses

| Question 19N | | | | | | |
|------------------------------|-----------|-----------|-----------|----------|------------|------------|
| Target Industry Cluster | Excellent | Good | Fair | Poor | DNA/NA* | Total |
| Aviation/Aerospace | 1 | 3 | 2 | 0 | 4 | 10 |
| Financial Services | 6 | 15 | 8 | 1 | 23 | 53 |
| High Tech Industries | 1 | 25 | 12 | 4 | 66 | 108 |
| Information Technology | 0 | 9 | 8 | 2 | 37 | 56 |
| Marine Science | 6 | 28 | 14 | 2 | 39 | 89 |
| Medical Technology | 0 | 9 | 5 | 2 | 21 | 37 |
| Microelectronics | 0 | 12 | 5 | 4 | 36 | 57 |
| Modeling/Simulation | 0 | 3 | 2 | 0 | 5 | 10 |
| Optics/Photonics | 0 | 2 | 2 | 0 | 0 | 4 |
| Research/Development | 1 | 16 | 3 | 2 | 26 | 48 |
| Wireless Technology | 0 | 0 | 3 | 1 | 2 | 6 |
| All Target Industries | 15 | 86 | 43 | 8 | 157 | 309 |

* Did Not Answer/Not Applicable

Business Environment: Proximity to higher education institution(s)

| Question 19O | | | | | | |
|------------------------------|-----------|------------|-----------|----------|------------|------------|
| Target Industry Cluster | Excellent | Good | Fair | Poor | DNA/NA* | Total |
| Aviation/Aerospace | 2 | 2 | 4 | 0 | 2 | 10 |
| Financial Services | 5 | 15 | 13 | 0 | 20 | 53 |
| High Tech Industries | 7 | 48 | 14 | 1 | 38 | 108 |
| Information Technology | 1 | 25 | 6 | 1 | 23 | 56 |
| Marine Science | 8 | 33 | 13 | 0 | 35 | 89 |
| Medical Technology | 2 | 15 | 4 | 1 | 15 | 37 |
| Microelectronics | 4 | 31 | 4 | 0 | 18 | 57 |
| Modeling/Simulation | 0 | 4 | 2 | 0 | 4 | 10 |
| Optics/Photonics | 0 | 2 | 2 | 0 | 0 | 4 |
| Research/Development | 6 | 17 | 9 | 2 | 14 | 48 |
| Wireless Technology | 0 | 0 | 4 | 0 | 2 | 6 |
| All Target Industries | 24 | 116 | 50 | 4 | 115 | 309 |

* Did Not Answer/Not Applicable

Target Employment and Industrial Land Study for the Pinellas Community

Cost of Doing Business: Government regulation and taxes

| Question 19 P | | | | | | |
|------------------------------|-----------|-----------|------------|-----------|-----------|------------|
| Target Industry Cluster | Excellent | Good | Fair | Poor | DNA/NA* | Total |
| Aviation/Aerospace | 0 | 1 | 6 | 3 | 0 | 10 |
| Financial Services | 1 | 13 | 21 | 9 | 9 | 53 |
| High Tech Industries | 5 | 15 | 52 | 26 | 10 | 108 |
| Information Technology | 2 | 12 | 27 | 8 | 7 | 56 |
| Marine Science | 4 | 9 | 33 | 29 | 14 | 89 |
| Medical Technology | 2 | 7 | 13 | 13 | 2 | 37 |
| Microelectronics | 1 | 10 | 29 | 10 | 7 | 57 |
| Modeling/Simulation | 0 | 1 | 7 | 1 | 1 | 10 |
| Optics/Photonics | 0 | 0 | 1 | 2 | 1 | 4 |
| Research/Development | 4 | 6 | 24 | 8 | 6 | 48 |
| Wireless Technology | 0 | 1 | 2 | 2 | 1 | 6 |
| All Target Industries | 12 | 49 | 133 | 75 | 40 | 309 |

* Did Not Answer/Not Applicable

Cost of Doing Business: Cost of flood and wind insurance

| Question 19 Q | | | | | | |
|------------------------------|-----------|-----------|-----------|------------|-----------|------------|
| Target Industry Cluster | Excellent | Good | Fair | Poor | DNA/NA* | Total |
| Aviation/Aerospace | 0 | 1 | 3 | 6 | 0 | 10 |
| Financial Services | 1 | 4 | 13 | 24 | 11 | 53 |
| High Tech Industries | 4 | 5 | 22 | 64 | 13 | 108 |
| Information Technology | 1 | 2 | 14 | 31 | 8 | 56 |
| Marine Science | 5 | 1 | 15 | 54 | 14 | 89 |
| Medical Technology | 1 | 3 | 5 | 25 | 3 | 37 |
| Microelectronics | 2 | 1 | 14 | 31 | 9 | 57 |
| Modeling/Simulation | 0 | 0 | 2 | 7 | 1 | 10 |
| Optics/Photonics | 0 | 0 | 0 | 4 | 0 | 4 |
| Research/Development | 4 | 2 | 5 | 29 | 8 | 48 |
| Wireless Technology | 0 | 0 | 0 | 6 | 0 | 6 |
| All Target Industries | 11 | 12 | 58 | 182 | 46 | 309 |

* Did Not Answer/Not Applicable

Target Employment and Industrial Land Study for the Pinellas Community

Cost of Doing Business: Labor costs

| Question 19R | | | | | | |
|------------------------------|-----------|------------|------------|-----------|-----------|------------|
| Target Industry Cluster | Excellent | Good | Fair | Poor | DNA/NA* | Total |
| Aviation/Aerospace | 0 | 3 | 6 | 1 | 0 | 10 |
| Financial Services | 2 | 22 | 18 | 4 | 7 | 53 |
| High Tech Industries | 5 | 38 | 44 | 12 | 9 | 108 |
| Information Technology | 3 | 14 | 28 | 3 | 8 | 56 |
| Marine Science | 2 | 25 | 41 | 7 | 14 | 89 |
| Medical Technology | 2 | 9 | 22 | 2 | 2 | 37 |
| Microelectronics | 3 | 17 | 25 | 6 | 6 | 57 |
| Modeling/Simulation | 0 | 2 | 4 | 3 | 1 | 10 |
| Optics/Photonics | 0 | 0 | 3 | 1 | 0 | 4 |
| Research/Development | 4 | 19 | 19 | 2 | 4 | 48 |
| Wireless Technology | 0 | 2 | 3 | 1 | 0 | 6 |
| All Target Industries | 12 | 100 | 137 | 23 | 37 | 309 |

* Did Not Answer/Not Applicable

Cost of Doing Business: Cost of workman's compensation insurance

| Question 19S | | | | | | |
|------------------------------|-----------|-----------|------------|-----------|-----------|------------|
| Target Industry Cluster | Excellent | Good | Fair | Poor | DNA/NA* | Total |
| Aviation/Aerospace | 0 | 1 | 6 | 3 | 0 | 10 |
| Financial Services | 2 | 15 | 21 | 9 | 6 | 53 |
| High Tech Industries | 3 | 22 | 49 | 26 | 8 | 108 |
| Information Technology | 0 | 9 | 31 | 9 | 7 | 56 |
| Marine Science | 5 | 15 | 33 | 25 | 11 | 89 |
| Medical Technology | 1 | 4 | 19 | 11 | 2 | 37 |
| Microelectronics | 0 | 12 | 28 | 12 | 5 | 57 |
| Modeling/Simulation | 0 | 2 | 4 | 4 | 0 | 10 |
| Optics/Photonics | 0 | 0 | 1 | 3 | 0 | 4 |
| Research/Development | 3 | 9 | 18 | 10 | 8 | 48 |
| Wireless Technology | 0 | 2 | 2 | 2 | 0 | 6 |
| All Target Industries | 11 | 57 | 132 | 74 | 35 | 309 |

* Did Not Answer/Not Applicable

Target Employment and Industrial Land Study for the Pinellas Community

**20. How do you expect your business to perform over the next three to five years?
Choose only one.**

- ☐ Moderate to high growth
- ☐ Slow to moderate growth
- ☐ No change
- ☐ Decline

Businesses are generally optimistic about their future performance. Half of all respondents expected that their businesses will see slow to moderate growth over the next five years, and another 41 percent expected moderate to high growth. Only five percent reported no expectation of change, and less than two percent anticipated a decline in their business performance.

| Question 20 | | | | | | |
|--------------------------------|-------------------------|-------------------------|----------------|------------------|-----------------|--------------|
| Target Industry Cluster | Moderate to High | Slow to Moderate | Decline | No Change | DNA/NA * | Total |
| Aviation/Aerospace | 6 | 4 | 0 | 0 | 0 | 10 |
| Financial Services | 22 | 29 | 0 | 2 | 0 | 53 |
| High Tech Industries | 51 | 52 | 1 | 4 | 0 | 108 |
| Information Technology | 31 | 23 | 1 | 1 | 0 | 56 |
| Marine Science | 23 | 53 | 3 | 9 | 1 | 89 |
| Medical Technology | 18 | 16 | 1 | 1 | 1 | 37 |
| Microelectronics | 32 | 21 | 1 | 3 | 0 | 57 |
| Modeling/Simulation | 2 | 7 | 0 | 1 | 0 | 10 |
| Optics/Photonics | 2 | 0 | 0 | 2 | 0 | 4 |
| Research/Development | 26 | 16 | 2 | 3 | 1 | 48 |
| Wireless Technology | 3 | 2 | 0 | 1 | 0 | 6 |
| All Target Industries | 128 | 156 | 6 | 16 | 3 | 309 |

* Did Not Answer/Not Applicable

21. Do you feel that land use/zoning regulation is preventing your business from performing up to its potential? ☐ Yes ☐ No

Comment(s): _____

Fewer than thirteen percent of businesses reported experiencing land use or zoning issues that affected their business. There were many highly individualized comments, with a few respondents conflating the cost of taxes and insurance with land use/zoning regulations.

Target Employment and Industrial Land Study for the Pinellas Community

Notably, almost half of all constraints were reported by respondents in the Marine Science cluster. Overall, the Marine Science and Medical Technology clusters had the highest percentage of complaints, while Modeling/Simulation and Wireless Technology businesses reported no issues at all.

| Question 21 | | | | | | | |
|--------------------------------|---|---------------------------------|---------------------------|----------------------------------|-------------|------------------|--------------|
| Target Industry Cluster | Costs of Taxes/ Insurance/ Sites | Industry-Specific Issues | Unspecified Issues | Zoning/ Regulation Issues | None | DNA/ NA * | Total |
| Aviation/Aerospace | 0 | 0 | 1 | 0 | 9 | 0 | 10 |
| Financial Services | 0 | 0 | 2 | 1 | 46 | 4 | 53 |
| High Tech Industries | 2 | 0 | 2 | 4 | 99 | 1 | 108 |
| Information Technology | 1 | 0 | 3 | 2 | 49 | 1 | 56 |
| Marine Science | 1 | 0 | 10 | 6 | 71 | 1 | 89 |
| Medical Technology | 0 | 1 | 1 | 4 | 30 | 1 | 37 |
| Microelectronics | 2 | 0 | 2 | 1 | 52 | 0 | 57 |
| Modeling/Simulation | 0 | 0 | 0 | 0 | 10 | 0 | 10 |
| Optics/Photonics | 0 | 0 | 0 | 0 | 4 | 0 | 4 |
| Research/Development | 0 | 0 | 1 | 3 | 43 | 1 | 48 |
| Wireless Technology | 0 | 0 | 0 | 0 | 6 | 0 | 6 |
| All Target Industries | 3 | 1 | 19 | 16 | 262 | 8 | 309 |

* Did Not Answer/Not Applicable

Target Employment and Industrial Land Study for the Pinellas Community

22. Please rate the following potential solutions for any problems that are facing your business in Pinellas County.

| | Very Important | Somewhat Important | Not Important | Does Not Apply |
|---|-----------------------|-----------------------|-----------------------|-----------------------|
| Planning policies should be relaxed to allow new business development | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| More business incubator/start-up space should be provided | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Planning policies should ensure that existing commercial sites are not lost to other uses (e.g., residential development) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Planning policies should ensure that existing industrial sites are not lost to other uses (e.g., commercial development) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| More live/work units or home offices should be allowed | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| More land that is zoned commercial is needed within the county | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| More land that is zoned industrial is needed within the county | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| More workforce housing is needed in the county | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Improvements should be made to public transit services | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Improvements should be made to road infrastructure | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Other: | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Recipients were then asked to rank a number of land use and transportation planning solutions that could be used to address problems faced by local businesses. The highest-ranked solutions, defined as those receiving the largest percentage of “very important” and “somewhat important” responses, were improvements to road infrastructure (75 percent), protection of commercial sites from conversion to other uses (69 percent), more workforce housing (62 percent), and protection of industrial sites from conversion to other uses (58 percent). The next few pages contain tables and figures that split out each cluster’s answers for each of the factors listed above.

Target Employment and Industrial Land Study for the Pinellas Community

Planning policies should be relaxed to allow new business development.

| Question 22A | | | | | |
|--------------------------------|-----------------------|---------------------------|----------------------|-----------------|--------------|
| Target Industry Cluster | Very Important | Somewhat Important | Not Important | DNA/NA * | Total |
| Aviation/Aerospace | 2 | 5 | 1 | 2 | 10 |
| Financial Services | 9 | 20 | 9 | 15 | 53 |
| High Tech Industries | 19 | 39 | 22 | 28 | 108 |
| Information Technology | 8 | 27 | 15 | 6 | 56 |
| Marine Science | 26 | 23 | 12 | 28 | 89 |
| Medical Technology | 12 | 8 | 5 | 12 | 37 |
| Microelectronics | 7 | 26 | 15 | 9 | 57 |
| Modeling/Simulation | 1 | 2 | 3 | 4 | 10 |
| Optics/Photonics | 1 | 0 | 1 | 2 | 4 |
| Research/Development | 10 | 13 | 12 | 13 | 48 |
| Wireless Technology | 2 | 0 | 2 | 2 | 6 |
| All Target Industries | 70 | 100 | 59 | 80 | 309 |

* Did Not Answer/Not Applicable

More business incubator/start-up space should be provided.

| Question 22B | | | | | |
|--------------------------------|-----------------------|---------------------------|----------------------|-----------------|--------------|
| Target Industry Cluster | Very Important | Somewhat Important | Not Important | DNA/NA * | Total |
| Aviation/Aerospace | 1 | 5 | 0 | 4 | 10 |
| Financial Services | 5 | 17 | 11 | 20 | 53 |
| High Tech Industries | 13 | 27 | 34 | 34 | 108 |
| Information Technology | 4 | 23 | 18 | 11 | 56 |
| Marine Science | 14 | 20 | 23 | 32 | 89 |
| Medical Technology | 3 | 14 | 8 | 12 | 37 |
| Microelectronics | 5 | 17 | 22 | 13 | 57 |
| Modeling/Simulation | 0 | 0 | 6 | 4 | 10 |
| Optics/Photonics | 0 | 0 | 2 | 2 | 4 |
| Research/Development | 9 | 18 | 11 | 10 | 48 |
| Wireless Technology | 1 | 0 | 3 | 2 | 6 |
| All Target Industries | 38 | 98 | 80 | 93 | 309 |

* Did Not Answer/Not Applicable

Target Employment and Industrial Land Study for the Pinellas Community

Planning policies should ensure that existing commercial sites are not lost to other uses (e.g., residential development)

| Question 22C | | | | | |
|------------------------------|----------------|--------------------|---------------|-----------|------------|
| Target Industry Cluster | Very Important | Somewhat Important | Not Important | DNA/NA* | Total |
| Aviation/Aerospace | 5 | 2 | 1 | 2 | 10 |
| Financial Services | 15 | 23 | 7 | 8 | 53 |
| High Tech Industries | 26 | 43 | 16 | 23 | 108 |
| Information Technology | 15 | 25 | 10 | 6 | 56 |
| Marine Science | 30 | 34 | 12 | 13 | 89 |
| Medical Technology | 11 | 12 | 7 | 7 | 37 |
| Microelectronics | 12 | 31 | 9 | 5 | 57 |
| Modeling/Simulation | 2 | 4 | 0 | 4 | 10 |
| Optics/Photonics | 2 | 1 | 1 | 0 | 4 |
| Research/Development | 15 | 16 | 8 | 9 | 48 |
| Wireless Technology | 0 | 3 | 2 | 1 | 6 |
| All Target Industries | 94 | 118 | 47 | 50 | 309 |

* Did Not Answer/Not Applicable

Planning policies should ensure that existing industrial sites are not lost to other uses (e.g., commercial development).

| Question 22D | | | | | |
|------------------------------|----------------|--------------------|---------------|-----------|------------|
| Target Industry Cluster | Very Important | Somewhat Important | Not Important | DNA/NA* | Total |
| Aviation/Aerospace | 4 | 3 | 1 | 2 | 10 |
| Financial Services | 10 | 18 | 9 | 16 | 53 |
| High Tech Industries | 22 | 38 | 21 | 27 | 108 |
| Information Technology | 12 | 21 | 14 | 9 | 56 |
| Marine Science | 25 | 28 | 15 | 21 | 89 |
| Medical Technology | 9 | 13 | 6 | 9 | 37 |
| Microelectronics | 13 | 22 | 15 | 7 | 57 |
| Modeling/Simulation | 2 | 4 | 0 | 4 | 10 |
| Optics/Photonics | 1 | 1 | 1 | 1 | 4 |
| Research/Development | 9 | 18 | 10 | 11 | 48 |
| Wireless Technology | 0 | 3 | 2 | 1 | 6 |
| All Target Industries | 70 | 109 | 56 | 74 | 309 |

* Did Not Answer/Not Applicable

Target Employment and Industrial Land Study for the Pinellas Community

More live/work units or home offices should be allowed.

| Question 22E | | | | | |
|--------------------------------|-----------------------|---------------------------|----------------------|----------------|--------------|
| Target Industry Cluster | Very Important | Somewhat Important | Not Important | DNA/NA* | Total |
| Aviation/Aerospace | 1 | 2 | 3 | 4 | 10 |
| Financial Services | 8 | 15 | 15 | 15 | 53 |
| High Tech Industries | 13 | 24 | 36 | 35 | 108 |
| Information Technology | 9 | 10 | 21 | 16 | 56 |
| Marine Science | 8 | 17 | 32 | 32 | 89 |
| Medical Technology | 2 | 12 | 11 | 12 | 37 |
| Microelectronics | 6 | 12 | 20 | 19 | 57 |
| Modeling/Simulation | 0 | 4 | 2 | 4 | 10 |
| Optics/Photonics | 0 | 0 | 4 | 0 | 4 |
| Research/Development | 8 | 15 | 17 | 8 | 48 |
| Wireless Technology | 0 | 1 | 4 | 1 | 6 |
| All Target Industries | 39 | 74 | 104 | 92 | 309 |

* Did Not Answer/Not Applicable

More land that is zoned commercial is needed within the county.

| Question 22F | | | | | |
|--------------------------------|-----------------------|---------------------------|----------------------|----------------|--------------|
| Target Industry Cluster | Very Important | Somewhat Important | Not Important | DNA/NA* | Total |
| Aviation/Aerospace | 1 | 6 | 1 | 2 | 10 |
| Financial Services | 3 | 22 | 15 | 13 | 53 |
| High Tech Industries | 13 | 43 | 26 | 26 | 108 |
| Information Technology | 10 | 23 | 12 | 11 | 56 |
| Marine Science | 12 | 31 | 22 | 24 | 89 |
| Medical Technology | 6 | 14 | 7 | 10 | 37 |
| Microelectronics | 7 | 27 | 13 | 10 | 57 |
| Modeling/Simulation | 2 | 4 | 1 | 3 | 10 |
| Optics/Photonics | 0 | 2 | 2 | 0 | 4 |
| Research/Development | 6 | 19 | 14 | 9 | 48 |
| Wireless Technology | 0 | 1 | 4 | 1 | 6 |
| All Target Industries | 42 | 119 | 76 | 72 | 309 |

* Did Not Answer/Not Applicable

Target Employment and Industrial Land Study for the Pinellas Community

More land that is zoned industrial is needed within the county.

| Question 22G | | | | | |
|--------------------------------|-----------------------|---------------------------|----------------------|----------------|--------------|
| Target Industry Cluster | Very Important | Somewhat Important | Not Important | DNA/NA* | Total |
| Aviation/Aerospace | 2 | 6 | 0 | 2 | 10 |
| Financial Services | 4 | 11 | 16 | 22 | 53 |
| High Tech Industries | 16 | 33 | 28 | 30 | 108 |
| Information Technology | 7 | 14 | 21 | 13 | 56 |
| Marine Science | 16 | 25 | 21 | 27 | 89 |
| Medical Technology | 8 | 13 | 7 | 9 | 37 |
| Microelectronics | 6 | 18 | 16 | 16 | 57 |
| Modeling/Simulation | 3 | 3 | 1 | 3 | 10 |
| Optics/Photonics | 0 | 0 | 2 | 2 | 4 |
| Research/Development | 4 | 12 | 16 | 16 | 48 |
| Wireless Technology | 0 | 0 | 4 | 2 | 6 |
| All Target Industries | 46 | 87 | 83 | 92 | 309 |

* Did Not Answer/Not Applicable

More workforce housing is needed in the county.

| Question 22H | | | | | |
|--------------------------------|-----------------------|---------------------------|----------------------|----------------|--------------|
| Target Industry Cluster | Very Important | Somewhat Important | Not Important | DNA/NA* | Total |
| Aviation/Aerospace | 6 | 2 | 1 | 1 | 10 |
| Financial Services | 9 | 21 | 13 | 10 | 53 |
| High Tech Industries | 30 | 38 | 20 | 20 | 108 |
| Information Technology | 10 | 23 | 15 | 8 | 56 |
| Marine Science | 27 | 34 | 14 | 14 | 89 |
| Medical Technology | 12 | 9 | 6 | 10 | 37 |
| Microelectronics | 9 | 23 | 17 | 8 | 57 |
| Modeling/Simulation | 3 | 4 | 1 | 2 | 10 |
| Optics/Photonics | 0 | 0 | 2 | 2 | 4 |
| Research/Development | 12 | 17 | 13 | 6 | 48 |
| Wireless Technology | 2 | 1 | 1 | 2 | 6 |
| All Target Industries | 82 | 111 | 64 | 52 | 309 |

* Did Not Answer/Not Applicable

Target Employment and Industrial Land Study for the Pinellas Community

Improvements should be made to public transit services.

| Question 22I | | | | | |
|--------------------------------|-----------------------|---------------------------|----------------------|----------------|--------------|
| Target Industry Cluster | Very Important | Somewhat Important | Not Important | DNA/NA* | Total |
| Aviation/Aerospace | 2 | 5 | 3 | 0 | 10 |
| Financial Services | 9 | 24 | 12 | 8 | 53 |
| High Tech Industries | 18 | 36 | 25 | 29 | 108 |
| Information Technology | 11 | 19 | 15 | 11 | 56 |
| Marine Science | 12 | 33 | 26 | 18 | 89 |
| Medical Technology | 10 | 10 | 5 | 12 | 37 |
| Microelectronics | 10 | 17 | 18 | 12 | 57 |
| Modeling/Simulation | 2 | 5 | 1 | 2 | 10 |
| Optics/Photonics | 2 | 0 | 1 | 1 | 4 |
| Research/Development | 11 | 15 | 13 | 9 | 48 |
| Wireless Technology | 1 | 3 | 1 | 1 | 6 |
| All Target Industries | 58 | 113 | 77 | 61 | 309 |

* Did Not Answer/Not Applicable

Improvements should be made to road infrastructure.

| Question 22J | | | | | |
|--------------------------------|-----------------------|---------------------------|----------------------|----------------|--------------|
| Target Industry Cluster | Very Important | Somewhat Important | Not Important | DNA/NA* | Total |
| Aviation/Aerospace | 3 | 4 | 2 | 1 | 10 |
| Financial Services | 27 | 19 | 2 | 5 | 53 |
| High Tech Industries | 41 | 40 | 7 | 20 | 108 |
| Information Technology | 21 | 24 | 5 | 6 | 56 |
| Marine Science | 30 | 34 | 13 | 12 | 89 |
| Medical Technology | 13 | 10 | 4 | 10 | 37 |
| Microelectronics | 17 | 29 | 5 | 6 | 57 |
| Modeling/Simulation | 4 | 4 | 0 | 2 | 10 |
| Optics/Photonics | 2 | 0 | 1 | 1 | 4 |
| Research/Development | 16 | 19 | 5 | 8 | 48 |
| Wireless Technology | 1 | 3 | 1 | 1 | 6 |
| All Target Industries | 119 | 112 | 33 | 45 | 309 |

* Did Not Answer/Not Applicable

Target Employment and Industrial Land Study for the Pinellas Community

Other

| Question 22K | | | | | |
|------------------------------|----------------|--------------------|---------------|------------|------------|
| Target Industry Cluster | Very Important | Somewhat Important | Not Important | DNA/NA * | Total |
| Aviation/Aerospace | 1 | 0 | 0 | 9 | 10 |
| Financial Services | 3 | 0 | 0 | 50 | 53 |
| High Tech Industries | 16 | 0 | 0 | 92 | 108 |
| Information Technology | 3 | 0 | 0 | 53 | 56 |
| Marine Science | 10 | 0 | 1 | 78 | 89 |
| Medical Technology | 5 | 0 | 0 | 32 | 37 |
| Microelectronics | 6 | 0 | 0 | 51 | 57 |
| Modeling/Simulation | 1 | 0 | 0 | 9 | 10 |
| Optics/Photonics | 0 | 0 | 1 | 3 | 4 |
| Research/Development | 6 | 1 | 1 | 40 | 48 |
| Wireless Technology | 1 | 0 | 1 | 4 | 6 |
| All Target Industries | 31 | 1 | 2 | 275 | 309 |

* Did Not Answer/Not Applicable

Detailed suggestions from the "Other" category.

| Question 22K | | | | | | |
|------------------------------|--------------------|----------|------------------------|-------------------|----------------------------|-------------------|
| Target Industry Cluster | Hotel Availability | Parking | Regulation/ Permitting | Site Availability | Tax/ Insurance/ Site Costs | Workforce Quality |
| Aviation/Aerospace | 0 | 0 | 0 | 0 | 0 | 1 |
| Financial Services | 0 | 0 | 0 | 0 | 2 | 0 |
| High Tech Industries | 0 | 1 | 4 | 0 | 8 | 1 |
| Information Technology | 0 | 0 | 1 | 0 | 2 | 0 |
| Marine Science | 2 | 0 | 3 | 0 | 5 | 0 |
| Medical Technology | 0 | 0 | 2 | 0 | 2 | 0 |
| Microelectronics | 0 | 0 | 2 | 0 | 3 | 0 |
| Modeling/Simulation | 0 | 0 | 0 | 0 | 0 | 1 |
| Optics/Photonics | 0 | 0 | 0 | 0 | 0 | 0 |
| Research/Development | 0 | 2 | 1 | 1 | 3 | 0 |
| Wireless Technology | 0 | 0 | 0 | 0 | 1 | 0 |
| All Target Industries | 2 | 2 | 7 | 1 | 16 | 1 |

Target Employment and Industrial Land Study for the Pinellas Community

23. What is the position/job title of the person completing this survey in this business?

- ☐ Owner/Partner/Principal
- ☐ Chief Executive/Chief Operating Officer
- ☐ Manager (finance, marketing, personnel)
- ☐ Other: _____

Sixty-three percent of respondents were the owner of their business, or a partner or principal. Nineteen percent were managers, thirteen percent were chief executive officers or chief operating officers, and the remainder held other positions or did not include a job title.

| Question 23 | Owner/ Partner/ Principal | CEO/ COO | Manager | Other | DNA/ NA * | Total |
|------------------------------|--|---------------------|----------------|--------------|----------------------|--------------|
| Aviation/Aerospace | 5 | 1 | 4 | 0 | 0 | 10 |
| Financial Services | 24 | 8 | 16 | 3 | 2 | 53 |
| High Tech Industries | 70 | 12 | 20 | 4 | 2 | 108 |
| Information Technology | 34 | 6 | 14 | 2 | 0 | 56 |
| Marine Science | 64 | 9 | 12 | 2 | 2 | 89 |
| Medical Technology | 24 | 7 | 3 | 1 | 2 | 37 |
| Microelectronics | 40 | 8 | 7 | 2 | 0 | 57 |
| Modeling/Simulation | 6 | 2 | 2 | 0 | 0 | 10 |
| Optics/Photonics | 2 | 0 | 2 | 0 | 0 | 4 |
| Research/Development | 31 | 7 | 8 | 1 | 1 | 48 |
| Wireless Technology | 2 | 1 | 3 | 0 | 0 | 6 |
| All Target Industries | 194 | 40 | 59 | 9 | 7 | 309 |

* Did Not Answer/Not Applicable

Target Employment and Industrial Land Study for the Pinellas Community

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Target Employment and Industrial Land Study for the Pinellas Community

Appendix B: Target Industries

As part of this study, the list of target industries has been refined to identify eleven separate industry “clusters,” using information from the federal Quarterly Census of Employment and Wages (QCEW) and *MarketPlace* published by a private company, Dun & Bradstreet Corporation (D&B). These sources are described in more detail in Appendix F, Data Sources and Bibliography. An industry cluster is defined as “a geographically bounded concentration of similar, related or complementary businesses, with active channels for business transactions, communications and dialogue, that share specialized infrastructure, labor markets and services, and that are faced with common opportunities and threats” (Rosenfeld, 1997).

Pinellas County’s existing target industries are located throughout the county in a broad distribution of locations and conditions. When the database was completed in late 2006, a total of 2,328 target industry employers were identified. The existing employers are located in every municipality and within the unincorporated portions of the county. However, several significant concentrations occur in the central portion of the county within the cities of Pinellas Park and Largo and in the unincorporated county along the Ulmerton Road corridor . The cities of Oldsmar, Clearwater, and St. Petersburg also include significant groupings. All of the mapped locations used geo-coded business addresses from the survey database and were cross-referenced with D&B data sources for employment types as well as property appraiser parcel data to generate parcel and address collated locations. In addition, GIS spatial data analysis was used to identify physical characteristics of the businesses.

The individual businesses in each cluster were identified using QCEW and D&B data, combined with information from other sources. Separately, the businesses were surveyed (as described in Chapter 2) and asked to identify their cluster affiliation. Since this is a self-reported designation, and some clusters overlap, many businesses included themselves within multiple clusters. The following pages contain the Pinellas County target industry cluster descriptions that include:

- Aviation/Aerospace
- Financial Services
- High Tech Industries
- Information Technology
- Marine Science
- Medical Technology
- Microelectronics
- Modeling/Simulation
- Optics/Photonics
- Research/Development
- Wireless Technology

Target Employment and Industrial Land Study for the Pinellas Community

A. Aviation/Aerospace Industry Cluster

This industry cluster includes businesses primarily involved in the manufacturing of instruments, systems, or materials for either aviation- or aerospace-related industries. Florida is a top state for this industry, ranking third in the United States for space, aeronautics and aviation employment (Governor's Commission on the Future of Space & Aeronautics, 2006).

Each of the 49 businesses located within the county was mailed a survey. Of that number, 39 are located on land designated IL and 10 on nonindustrially-designated land, but none on Industrial General land. There is a substantial grouping of this industry cluster occurring in the Central Pinellas Industrial Area along Ulmerton Road and near the St. Petersburg/Clearwater Airport although there is some dispersion of businesses as well.

The following table provides information about those sites where detailed property data exists. The typical Pinellas County business in this cluster is located on a site that measures between 0.5 and 7.5 acres in size and has a building that is between 24,000 to 100,000 square feet. Average area per employee equals about 2,255 square feet or 0.05 acres. The majority of businesses within this cluster (39 of 49) are located on industrially-designated land.

Aviation/Aerospace - Acreage, Building, and Use Comparison

| Countywide Site Acreage Analysis | | | | |
|--|----------------------|----------------------------|---------------------------------|-----------------------------|
| Total # of Firms | # of Firms with Data | Small Site (<0.5 Acres) | Medium Site (0.5-7.5 Acres) | Large Site (>7.5 Acres) |
| 49 | 49 | 3 | 34 | 11 |
| * | | 6.3% | 70.8% | 22.9% |
| Countywide Building Square Footage Analysis | | | | |
| Total # of Firms | # of Firms with Data | Small Bldg. (<24k Sq. Ft.) | Medium Bldg. (24k-100k Sq. Ft.) | Large Bldg. (>100k Sq. Ft.) |
| 49 | 46 | 16 | 21 | 9 |
| * | | 34.8% | 45.7% | 19.6% |
| Countywide Existing Land Use Analysis | | | | |
| Total # of Firms | # of Firms with Data | Industrial DOR Code | Commercial DOR Code | Other |
| 49 | 48 | 41 | 4 | 3 |
| * | | 85% | 8.3% | 6.7% |
| Countywide Future Land Use Analysis | | | | |
| Total # of Firms | # of Firms with Data | Industrial General | Industrial Limited | Other |
| 49 | 49 | 0 | 39 | 10 |
| * | | 0% | 79.6% | 20.4% |
| * Rows may not total to 100% due to rounding. Note: Different firm totals occur due to the source and completeness of datasets. Comparison sources included Pinellas County Property Appraiser, ES-202, and Dept. of Revenue (DOR). | | | | |

Target Employment and Industrial Land Study for the Pinellas Community

B. Financial Services Industry Cluster

This industry cluster includes financial technology and support facilities that provide banking, investment, payroll, and related services, primarily to other businesses. Pinellas County's cluster includes headquarters offices of two major financial service corporations, Raymond James and Franklin Templeton, as well as many smaller firms.

There is a dispersed pattern of this industry cluster occurring throughout the county. Concentrations are in the Central Pinellas Industrial Area in both Carillon and the Gateway areas, in the central business districts of St. Petersburg and Clearwater, and along the principal transportation corridors in the county.

The 394 Financial Services businesses in the county received a survey. Fifty-three businesses returned it and 22 of those had five or more employees. Responses indicate that 37 are located in IL, 4 in IG, but the majority (353 or 90 percent) are located on nonindustrially-designated land concentrated in the central portion of the county along Ulmerton Road.

The following table provides information about sites for which detailed property data was available. A typical Pinellas County business in this cluster is located on a site that measures between 0.5 and 7.5 acres in size, has a building that is less than 24,000 square feet, and is designated by the Department of Revenue as a commercial use.

Financial Services - Acreage, Building, and Use Comparison

| Countywide Site Acreage Analysis | | | | |
|---|----------------------|----------------------------|---------------------------------|-----------------------------|
| Total # of Firms | # of Firms with Data | Small Site (<0.5 Acres) | Medium Site (0.5-7.5 Acres) | Large Site (>7.5 Acres) |
| 394 | 387 | 95 | 239 | 53 |
| | * | 24.5% | 61.8% | 13.5% |
| Countywide Building Square Footage Analysis | | | | |
| Total # of Firms | # of Firms with Data | Small Bldg. (<24k Sq. Ft.) | Medium Bldg. (24k-100k Sq. Ft.) | Large Bldg. (>100k Sq. Ft.) |
| 394 | 359 | 175 | 100 | 84 |
| | | 48.7% | 27.9% | 23.4% |
| Countywide Existing Land Use Analysis | | | | |
| Total # of Firms | # of Firms with Data | Industrial DOR Code | Commercial DOR Code | Other |
| 394 | 387 | 27 | 304 | 56 |
| | | 7% | 78.6% | 14.4% |
| Countywide Future Land Use Analysis | | | | |
| Total # of Firms | # of Firms with Data | Industrial General | Industrial Limited | Other |
| 394 | 394 | 4 | 37 | 353 |
| | * | 1% | 9.4% | 89.6% |
| * Rows may not total to 100% due to rounding. Note: Different firm totals occur due to the source and completeness of datasets. Comparison sources included Pinellas Co. Property Appraiser, ES-202, and DOR. | | | | |

Target Employment and Industrial Land Study for the Pinellas Community

C. High Tech Industry Cluster

Pinellas County is part of the Florida High Tech Corridor, a region that stretches from the Gulf Coast to the Space Coast along Interstate 4, and is one of the fastest growing high tech centers in the United States. The term “high tech” is used generally to denote industries that develop or use advanced technology. Therefore, this industry cluster sometimes overlaps the others discussed in this study.

Each of the 646 High Tech businesses was mailed a survey and 113 responded. A total of 94 of those businesses had five or more employees. There is a broad distribution of this cluster throughout the county, with a concentration in the central to north-central portions.

Of the 646 businesses, 191 are located in IL, 19 in IG, and 436 in nonindustrially-designated locations. Those that do are concentrated in the central portion of the county along Ulmerton Road, and in St. Petersburg, Clearwater, and Oldsmar industrial development centers.

The typical Pinellas County business in this cluster is located on a site that measures between 0.5 and 7.5 acres in size, has a building that is less than 24,000 square feet, and is designated by the Department of Revenue as a commercial use.

High Tech - Acreage, Building, and Use Comparison

| Countywide Site Acreage Analysis | | | | |
|---|----------------------|----------------------------|---------------------------------|-----------------------------|
| Total # of Firms | # of Firms with Data | Small Site (<0.5 Acres) | Medium Site (0.5-7.5 Acres) | Large Site (>7.5 Acres) |
| 646 | 637 | 175 | 380 | 82 |
| | * | 27.5% | 59.7% | 12.9% |
| Countywide Building Square Footage Analysis | | | | |
| Total # of Firms | # of Firms with Data | Small Bldg. (<24k Sq. Ft.) | Medium Bldg. (24k-100k Sq. Ft.) | Large Bldg. (>100k Sq. Ft.) |
| 646 | 605 | 331 | 196 | 78 |
| | | 54.7% | 32.4% | 12.9% |
| Countywide Existing Land Use Analysis | | | | |
| Total # of Firms | # of Firms with Data | Industrial DOR Code | Commercial DOR Code | Other |
| 646 | 636 | 188 | 304 | 144 |
| | | 30% | 47.8% | 22.2% |
| Countywide Future Land Use Analysis | | | | |
| Total # of Firms | # of Firms with Data | Industrial General | Industrial Limited | Other |
| 646 | 646 | 19 | 191 | 436 |
| | * | 2.9% | 30% | 67.5% |
| * Rows may not total to 100% due to rounding. Note: Different firm totals occur due to the source and completeness of datasets. Comparison sources included Pinellas Co. Property Appraiser, ES-202, and DOR. | | | | |

Target Employment and Industrial Land Study for the Pinellas Community

D. Information Technology Industry Cluster

This industry cluster includes knowledge-based resources and the high tech industries that design, create, and manage computer-related software, hardware, and services. Statewide, this cluster has expanded more than 60 percent over the last five years. There is a broad distribution of this industry cluster in Pinellas County with substantial concentrations occurring in the central portion of the county and in St. Petersburg.

There are 394 Information Technology businesses in the county. Of the 25 Information Technology businesses that returned the survey, 17 of them had five or more employees. With regard to the future land use category in which these 394 businesses are located, usable data is available for 379 of them which indicates that 92 are located in IL, five in IG, but the majority (282 or 74.4 percent) are located on nonindustrially-designated land. While the majority of businesses in this cluster are not situated on industrially-designated land, those that are so situated are concentrated in the Central Pinellas Industrial Area.

The following table provides information for those sites where detailed property data exists. The typical Pinellas County business in this cluster is located on a site that measures between 0.5 and 7.5 acres in size, has a building that is less than 24,000 square feet, and is designated by the Department of Revenue as an industrial use.

Information Technology - Acreage, Building, and Use Comparison

| Countywide Site Acreage Analysis | | | | |
|---|----------------------|----------------------------|---------------------------------|-----------------------------|
| Total # of Firms | # of Firms with Data | Small Site (<0.5 Acres) | Medium Site (0.5-7.5 Acres) | Large Site (>7.5 Acres) |
| 394 | 387 | 95 | 239 | 53 |
| | | 24.5% | 61.8% | 13.7% |
| Countywide Building Square Footage Analysis | | | | |
| Total # of Firms | # of Firms with Data | Small Bldg. (<24k Sq. Ft.) | Medium Bldg. (24k-100k Sq. Ft.) | Large Bldg. (>100k Sq. Ft.) |
| 394 | 359 | 175 | 100 | 84 |
| | | 34.8% | 27.9% | 23.4% |
| Countywide Existing Land Use Analysis | | | | |
| Total # of Firms | # of Firms with Data | Industrial DOR Code | Commercial DOR Code | Other |
| 394 | 387 | 27 | 304 | 56 |
| | | 7% | 78.6% | 14.4% |
| Countywide Future Land Use Analysis | | | | |
| Total # of Firms | # of Firms with Data | Industrial General | Industrial Limited | Other |
| 394 | 379 | 92 | 5 | 282 |
| | | 24.3 | 1.3% | 74.4% |
| * Rows may not total to 100% due to rounding. Note: Different firm totals occur due to the source and completeness of datasets. Comparison sources included Pinellas Co. Property Appraiser, ES-202, and DOR. | | | | |

Target Employment and Industrial Land Study for the Pinellas Community

E. Marine Science Industry Cluster

This industry cluster represents the interdisciplinary scientific study of oceans, coastal seas, and estuaries, together with the supportive manufacturing and services of the marine industry. Pinellas County's geographic relationship with Tampa Bay and the Gulf of Mexico is a prime asset for this industry group.

The 374 Marine Science businesses in the county were mailed a survey and 186 responded, and of those, 156 had five or more employees. There is a broad distribution of this industry cluster throughout the county with a substantial concentration occurring in the central portion of the county, along principal transportation corridors, and in St. Petersburg and Tarpon Springs locations proximate to the water.

Of the 374 businesses, 118 are located on land designated IL, 22 on IG, and 234 on nonindustrially-designated land. Note that approximately 37 percent of the businesses in this cluster are located on industrially-designated lands, a relatively high percentage compared to the other clusters.

The typical Pinellas County business in this cluster is located on a site that measures between 0.5 and 7.5 acres in size, has a building that is less than 24,000 square feet, and is designated by the Department of Revenue as a commercial use.

Marine Science - Acreage, Building, and Use Comparison

| Countywide Site Acreage Analysis | | | | |
|---|----------------------|----------------------------|---------------------------------|-----------------------------|
| Total # of Firms | # of Firms with Data | Small Site (<0.5 Acres) | Medium Site (0.5-7.5 Acres) | Large Site (>7.5 Acres) |
| 374 | 372 | 79 | 251 | 42 |
| | | 21.20% | 67.2% | 11.3% |
| Countywide Building Square Footage Analysis | | | | |
| Total # of Firms | # of Firms with Data | Small Bldg. (<24k Sq. Ft.) | Medium Bldg. (24k-100k Sq. Ft.) | Large Bldg. (>100k Sq. Ft.) |
| 374 | 358 | 215 | 110 | 33 |
| | | 60.1% | 30.7% | 9.2% |
| Countywide Existing Land Use Analysis | | | | |
| Total # of Firms | # of Firms with Data | Industrial DOR Code | Commercial DOR Code | Other |
| 374 | 373 | 129 | 156 | 88 |
| | | 34.6% | 41.8% | 23.6% |
| Countywide Future Land Use Analysis | | | | |
| Total # of Firms | # of Firms with Data | Industrial General | Industrial Limited | Other |
| 374 | 374 | 22 | 118 | 234 |
| | * | 5.9% | 31.6% | 62.6% |
| * Rows may not total to 100% due to rounding. Note: Different firm totals occur due to the source and completeness of datasets. Comparison sources included Pinellas Co. Property Appraiser, ES-202, and DOR. | | | | |

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F. Medical Technology Industry Cluster

This industry cluster uses technology to improve the management of health conditions, through research and manufacture of medical devices, pharmaceuticals, and related products. A large share of the medical technology businesses within the Florida High Tech Corridor are located in Pinellas County, which has 33 percent of the corridor's medical technology employment (PCED Annual Report, 2004). A network of medical manufacturers exists that represents and promotes this county industry sector.

There are 181 Medical Technology businesses in the county. Each was mailed a survey and 29 responded of which 28 had five or more employees. Of all the businesses, 81 are located on land designated IL, three on IG, and 97 on nonindustrially-designated land. There is a substantial concentration of this industry cluster in the central portion of the county along Ulmerton Road, in St. Petersburg, and in the Largo and Oldsmar industrial areas.

The following table provides information about the cluster. The typical Pinellas County business is located on a site that measures between 0.5 and 7.5 acres in size, has a building that is less than 24,000 square feet, and a slight majority is designated as a commercial use by the Department of Revenue, but an almost equal number is designated as industrial.

Medical Technology - Acreage, Building, and Use Comparison

| Countywide Site Acreage Analysis | | | | |
|---|----------------------|----------------------------|---------------------------------|-----------------------------|
| Total # of Firms | # of Firms with Data | Small Site (<0.5 Acres) | Medium Site (0.5-7.5 Acres) | Large Site (>7.5 Acres) |
| 181 | 181 | 38 | 111 | 32 |
| | | 21% | 61.3% | 17.7% |
| Countywide Building Square Footage Analysis | | | | |
| Total # of Firms | # of Firms with Data | Small Bldg. (<24k Sq. Ft.) | Medium Bldg. (24k-100k Sq. Ft.) | Large Bldg. (>100k Sq. Ft.) |
| 181 | 168 | 87 | 56 | 25 |
| | | 51.8% | 33.3% | 14.9% |
| Countywide Existing Land Use Analysis | | | | |
| Total # of Firms | # of Firms with Data | Industrial DOR Code | Commercial DOR Code | Other |
| 181 | 181 | 71 | 76 | 34 |
| | | 39% | 42% | 19% |
| Countywide Future Land Use Analysis | | | | |
| Total # of Firms | # of Firms with Data | Industrial General | Industrial Limited | Other |
| 181 | 181 | 3 | 81 | 97 |
| | * | 1.7% | 44.8% | 53.6% |
| * Rows may not total to 100% due to rounding. Note: Different firm totals occur due to the source and completeness of datasets. Comparison sources included Pinellas Co. Property Appraiser, ES-202, and DOR. | | | | |

Target Employment and Industrial Land Study for the Pinellas Community

G. Microelectronics Industry Cluster

This industry cluster includes a group of technologies that integrate multiple devices into a small physical area, generally a silicon (or other) wafer. A common example is an integrated circuit or microchip found in computers or mobile phones. Because its products are used by many other industry clusters, it is a critical enabling technology that is important to future economic growth.

Each of the 365 Microelectronics businesses in the county was mailed a survey. Of the total businesses, 113 returned the survey and 87 of them had five or more employees. There is a broad distribution throughout the county that appears to be based on principal transportation corridors. Groupings of this industry cluster occur in the central business districts of Clearwater, St. Petersburg, the Gateway Area, and in the central portion of the county along Ulmerton Road and in Pinellas Park. A total of 79 businesses are located on land designated IL, seven on IG, and 279 on nonindustrially-designated land.

A typical Pinellas County business in this cluster is located on a site that measures between 0.5 and 7.5 acres in size, has a building that is less than 24,000 square feet, and is designated by the Department of Revenue as a commercial use.

Microelectronics - Acreage, Building, and Use Comparison

| Countywide Site Acreage Analysis | | | | |
|---|----------------------|----------------------------|---------------------------------|-----------------------------|
| Total # of Firms | # of Firms with Data | Small Site (<0.5 Acres) | Medium Site (0.5-7.5 Acres) | Large Site (>7.5 Acres) |
| 365 | 357 | 112 | 205 | 40 |
| | | 31.4% | 57.4% | 11.2% |
| Countywide Building Square Footage Analysis | | | | |
| Total # of Firms | # of Firms with Data | Small Bldg. (<24k Sq. Ft.) | Medium Bldg. (24k-100k Sq. Ft.) | Large Bldg. (>100k Sq. Ft.) |
| 365 | 336 | 189 | 98 | 49 |
| | | 56.3% | 29.2% | 14.6% |
| Countywide Existing Land Use Analysis | | | | |
| Total # of Firms | # of Firms with Data | Industrial DOR Code | Commercial DOR Code | Other |
| 365 | 356 | 66 | 196 | 94 |
| | | 19% | 55.1% | 25.9% |
| Countywide Future Land Use Analysis | | | | |
| Total # of Firms | # of Firms with Data | Industrial General | Industrial Limited | Other |
| 365 | 365 | 7 | 79 | 279 |
| | * | 1.9% | 21.6% | 76.4% |
| * Rows may not total to 100% due to rounding. Note: Different firm totals occur due to the source and completeness of datasets. Comparison sources included Pinellas Co. Property Appraiser, ES-202, and DOR. | | | | |

Target Employment and Industrial Land Study for the Pinellas Community

H. Modeling/Simulation Industry Cluster

This industry cluster includes businesses that develop and use computer simulation to mimic complex natural or manmade systems, in order to test theories, validate models, understand the dynamics of systems, detect problems, and train personnel.

There are 49 Modeling/Simulation businesses in the county. Each was mailed a survey and 11 responded. All had five or more employees.

A total of 31 businesses are located on land designated IL, two on IG, and 16 on nonindustrially-designated land. Analysis shows a broad distribution of the cluster throughout the county that appears to be based on principal transportation corridors with a concentration in the western portion of Pinellas Park.

A typical Pinellas County business in this cluster is located on a site that measures between 0.5 and 7.5 acres in size, has a building that is 24 to 100 thousand square feet, and is designated by the Department of Revenue as an industrial use.

Modeling/Simulation - Acreage, Building, and Use Comparison

| Countywide Site Acreage Analysis | | | | |
|---|----------------------|----------------------------|---------------------------------|-----------------------------|
| Total # of Firms | # of Firms with Data | Small Site (<0.5 Acres) | Medium Site (0.5-7.5 Acres) | Large Site (>7.5 Acres) |
| 49 | 47 | 5 | 36 | 7 |
| | | 10.4% | 75% | 14.6% |
| Countywide Building Square Footage Analysis | | | | |
| Total # of Firms | # of Firms with Data | Small Bldg. (<24k Sq. Ft.) | Medium Bldg. (24k-100k Sq. Ft.) | Large Bldg. (>100k Sq. Ft.) |
| 49 | 46 | 15 | 27 | 4 |
| | | 32.6% | 58.7% | 8.7% |
| Countywide Existing Land Use Analysis | | | | |
| Total # of Firms | # of Firms with Data | Industrial DOR Code | Commercial DOR Code | Other |
| 49 | 47 | 35 | 8 | 5 |
| | | 73% | 16.7% | 10.3% |
| Countywide Future Land Use Analysis | | | | |
| Total # of Firms | # of Firms with Data | Industrial General | Industrial Limited | Other |
| 49 | 49 | 2 | 31 | 16 |
| | * | 4.0% | 63.3% | 32.6% |
| * Rows may not total to 100% due to rounding. Note: Different firm totals occur due to the source and completeness of datasets. Comparison sources included Pinellas Co. Property Appraiser, ES-202, and DOR. | | | | |

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I. Optics/Photonics Industry Cluster

This industry cluster includes businesses that control, manipulate, transfer, and store information through the use of light, through applications ranging from eyeglasses to advanced fiber optic telecommunications. Expansion of the global communications network will increase the need for businesses in this industry. Florida's photonics cluster is among the largest in the United States (Enterprise Florida, 2007).

There are 23 Optics/Photonics businesses in the county. Each was mailed a survey and five responded and four of them had five or more employees. There is a sparse distribution of this industry cluster occurring throughout the county along principal transportation corridors with a concentration in the western portion of Pinellas Park. Of the 23 businesses in this cluster, 14 are located on land designated IL, one on IG, and 8 on nonindustrially-designated land.

The following table provides information about this cluster. A typical Pinellas County business in this cluster is located on a site that measures between 0.5 and 7.5 acres in size, has a building that is less than 24,000 square feet in size, and is designated by the Department of Revenue as an industrial use.

Optic/Photonics - Acreage, Building, and Use Comparison

| Countywide Site Acreage Analysis | | | | |
|---|----------------------|----------------------------|---------------------------------|-----------------------------|
| Total # of Firms | # of Firms with Data | Small Site (<0.5 Acres) | Medium Site (0.5-7.5 Acres) | Large Site (>7.5 Acres) |
| 23 | 23 | 2 | 16 | 5 |
| | | 8.7% | 69.6% | 21.7% |
| Countywide Building Square Footage Analysis | | | | |
| Total # of Firms | # of Firms with Data | Small Bldg. (<24k Sq. Ft.) | Medium Bldg. (24k-100k Sq. Ft.) | Large Bldg. (>100k Sq. Ft.) |
| 23 | 22 | 10 | 5 | 7 |
| | | 45.5% | 22.7% | 31.8% |
| Countywide Existing Land Use Analysis | | | | |
| Total # of Firms | # of Firms with Data | Industrial DOR Code | Commercial DOR Code | Other |
| 23 | 23 | 15 | 5 | 3 |
| | | 65% | 21.7% | 13.3% |
| Countywide Future Land Use Analysis | | | | |
| Total # of Firms | # of Firms with Data | Industrial General | Industrial Limited | Other |
| 23 | 23 | 1 | 14 | 8 |
| | | 4.3% | 60.9% | 34.8% |
| * Rows may not total to 100% due to rounding. Note: Different firm totals occur due to the source and completeness of datasets. Comparison sources included Pinellas Co. Property Appraiser, ES-202, and DOR. | | | | |

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J. Research/Development Industry Cluster

This business industry cluster may occur within any of the other individual target industry clusters discussed in this study, but it relates directly to the discovery of new knowledge about products, processes, and services, and their application that fulfills market needs.

There are 296 Research/Development businesses in the county. Each was mailed a survey and 56 responded and of those, 45 had five or more employees. There is a broad distribution of this industry cluster occurring throughout the county, with groups in the central portions of Clearwater and St. Petersburg.

A total of 50 businesses are located on land designated IL, 3 on IG, and 243 on nonindustrially-designated land. There is a substantial concentration of this industry cluster in the central portion of the county along Ulmerton Road, in western Pinellas Park, and in Oldsmar.

The following table provides information about this cluster. A typical Pinellas County business in this cluster is located on a site that measures between 0.5 and 7.5 acres in size, has a building that is less than 24,000 square feet, and is designated by the Department of Revenue as an industrial use.

Research/Development - Acreage, Building, and Use Comparison

| Countywide Site Acreage Analysis | | | | |
|---|----------------------|----------------------------|---------------------------------|-----------------------------|
| Total # of Firms | # of Firms with Data | Small Site (<0.5 Acres) | Medium Site (0.5-7.5 Acres) | Large Site (>7.5 Acres) |
| 296 | 293 | 107 | 161 | 25 |
| | | 36.5% | 54.9% | 8.5% |
| Countywide Building Square Footage Analysis | | | | |
| Total # of Firms | # of Firms with Data | Small Bldg. (<24k Sq. Ft.) | Medium Bldg. (24k-100k Sq. Ft.) | Large Bldg. (>100k Sq. Ft.) |
| 296 | 262 | 157 | 80 | 25 |
| | | 60% | 30.5% | 9.5% |
| Countywide Existing Land Use Analysis | | | | |
| Total # of Firms | # of Firms with Data | Industrial DOR Code | Commercial DOR Code | Other |
| 296 | 293 | 41 | 170 | 82 |
| | | 14% | 58% | 28% |
| Countywide Future Land Use Analysis | | | | |
| Total # of Firms | # of Firms with Data | Industrial General | Industrial Limited | Other |
| 296 | 296 | 3 | 50 | 243 |
| | | 1% | 16.9% | 82.1% |
| * Rows may not total to 100% due to rounding. Note: Different firm totals occur due to the source and completeness of datasets. Comparison sources included Pinellas Co. Property Appraiser, ES-202, and DOR. | | | | |

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K. Wireless Technology Industry Cluster

This industry cluster includes businesses that provide wireless telecommunications technology, including cellular, mobile, paging, and unified messaging systems.

There are 32 Wireless Technology businesses in the county. Each was mailed a survey and eight responded and of those, seven had five or more employees. There is a substantial grouping of this industry cluster occurring along U.S. 19 in Clearwater. Of the 32 businesses, 12 had an IL designation, one IG, and 19 were located on nonindustrially-designated land.

The following table provides information about the cluster. A typical Pinellas County business in this cluster is located on a site that measures between 0.5 and 7.5 acres in size, has a building that is less than 24,000 square feet, and is designated by the Department of Revenue as an industrial use.

Wireless Technology - Acreage, Building, and Use Comparison

| Countywide Site Acreage Analysis | | | | |
|---|----------------------|----------------------------|---------------------------------|-----------------------------|
| Total # of Firms | # of Firms with Data | Small Site (<0.5 Acres) | Medium Site (0.5-7.5 Acres) | Large Site (>7.5 Acres) |
| 32 | 32 | 2 | 24 | 6 |
| | | 6.3% | 75% | 18.8% |
| Countywide Building Square Footage Analysis | | | | |
| Total # of Firms | # of Firms with Data | Small Bldg. (<24k Sq. Ft.) | Medium Bldg. (24k-100k Sq. Ft.) | Large Bldg. (>100k Sq. Ft.) |
| 32 | 32 | 12 | 10 | 10 |
| | | 37.5% | 31.3% | 31.3% |
| Countywide Existing Land Use Analysis | | | | |
| Total # of Firms | # of Firms with Data | Industrial DOR Code | Commercial DOR Code | Other |
| 32 | 32 | 15 | 14 | 3 |
| | | 47% | 43.8% | 9.2% |
| Countywide Future Land Use Analysis | | | | |
| Total # of Firms | # of Firms with Data | Industrial General | Industrial Limited | Other |
| 32 | 32 | 1 | 12 | 19 |
| | | 3.1% | 37.5% | 59.4% |
| * Rows may not total to 100% due to rounding. Note: Different firm totals occur due to the source and completeness of datasets. Comparison sources included Pinellas Co. Property Appraiser, ES-202, and DOR. | | | | |

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Appendix C: Countywide Plan and Rules Support for Target Industries

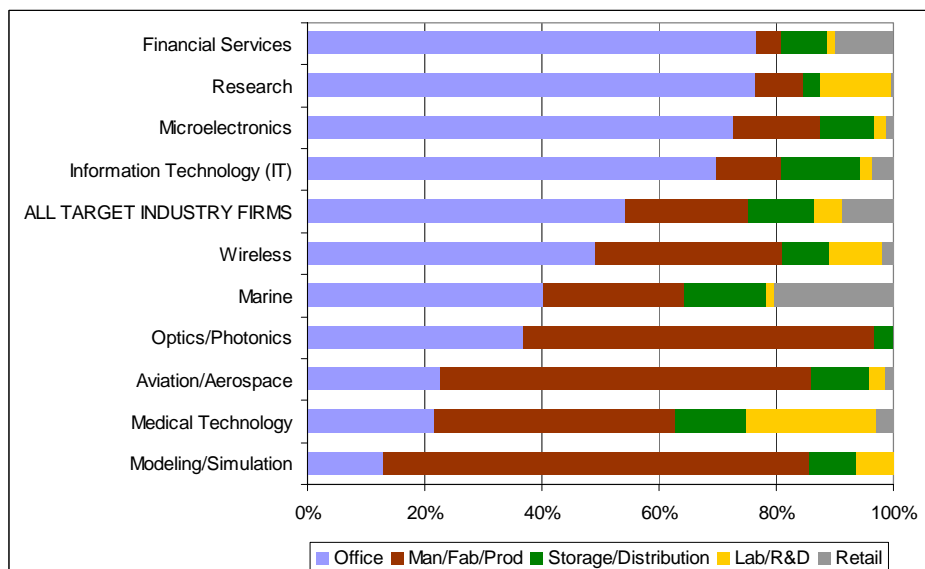
The *Countywide Plan Rules* provide a number of future land use categories that can potentially support target industries. A review was conducted to identify how the activities of target industries are supported or limited by the existing regulations.

A. Target Industry Land Use Needs

As discussed in Section 3 of this report, the target industry survey identified the various land uses that businesses require to perform their work. More than half (54 percent) of all space used by target industry firms at their current locations is for office uses; more than one-fifth (21 percent) is used for manufacturing, fabrication, or production; and 11 percent is used for warehouse or distribution purposes. While not every business requires all of these uses to occur together on one site, many do. These data show that in general, target industries require a mix of uses on a single parcel of land to be successful.

Not all target industries require the same mix of uses, however. As shown in Figure C-1 below, some target industries have little need for manufacturing space and a great need for office space, like the Financial Services and Research/Development clusters. Others have a great need for manufacturing space, like the Aviation/Aerospace and Modeling/Simulation clusters. The Medical Technology cluster has strong needs for almost all types of uses.

Figure C-1
Percentage of Building Space by Reported Use for
Surveyed Target Industry Firms Employing Five or More Persons



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B. Future Land Use Categories

The *Countywide Plan Rules* have established the major classifications, specific categories, and symbols shown in Table C-1 below. These terms will be used throughout the following discussion.

Table C-1
Land Use Classifications, Categories, and Symbols
Established by the *Countywide Plan Rules*

| Plan Classifications | Plan Categories | Plan Symbols |
|-----------------------|--|--|
| Residential | Residential Rural Residential Estate Residential Suburban Residential Low Residential Urban Residential Low Medium Residential Medium Residential High Residential Very High | RR RE RS RL RU RLM RM RH RVH |
| Mixed Use | Residential/Office Limited Residential/Office General Residential/Office/Retail Resort Facilities Overlay Resort Facilities Medium Resort Facilities High | R/OL R/OG R/O/R RFO RFM RFH |
| Commercial | Commercial Neighborhood Commercial Limited Commercial Recreation Commercial General | CN CL CR CG |
| Industrial | Industrial Limited Industrial General | IL IG |
| Public/Semi-Public | Preservation Recreation/Open Space Institutional Transportation/Utility | P R/OS I T/U |
| Planned Redevelopment | Residential Mixed Use Commercial Industrial | R MU C IND |
| Special Designations | Water/Drainage Feature Scenic/Non-Commercial Corridor Activity Center Community Redevelopment District Central Business District | As Noted As Noted AC CRD CBD |

Source: *Countywide Plan Rules*, 2007

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Each category allows both primary and secondary uses. As defined in the *Countywide Plan Rules*, “Primary uses are a principal use [*sic*] identified under the use characteristics of each category and represent those uses which the category is primarily designed to accommodate. Secondary uses are a principal use [*sic*] identified under the use characteristics of each category and represent those uses which the category is designed to accommodate as a secondary priority.”

1. Industrial, Commercial, and Mixed-Use Categories

The main focus of this study has been on the Industrial Limited (IL) and Industrial General (IG) categories, which allow for manufacturing and other industrial uses, as shown in Table C-2 below.

**Table C-2
Allowable Primary and Secondary Uses on
Industrially-Designated Lands**

| | Industrial Limited | Industrial General |
|----------------|--|---|
| Primary Uses | <ul style="list-style-type: none"> • Office • Research/Development • Light Manufacturing/Assembly (Class A & B) • Wholesale/Distribution (Class A & B) • Storage/Warehouse (Class A & B) | <ul style="list-style-type: none"> • Research/Development • Light Manufacturing/Assembly (Class A & B) • Heavy Manufacturing/Assembly • Wholesale/Distribution (Class A & B) • Storage/Warehouse (Class A & B) • Agricultural Processing • Vehicular Salvage |
| Secondary Uses | <ul style="list-style-type: none"> • Residential * • Retail Commercial • Personal Service/Office Support • Commercial/Business Service • Commercial Recreation • Transient Accommodation • Institutional • Transportation/Utility • Recreation/Open Space • Transfer/Recycling | <ul style="list-style-type: none"> • Institutional • Transportation/Utility • Commercial Recreation • Solid Waste/Refuse Disposal • Transfer/Recycling • Electric Power Generation Plant • Recreation/Open Space |

Source: *Countywide Plan Rules*, 2007

* Subject to master development plan approved by the CPA

There are certain allowable uses that are unique to the industrial categories. For example, IG is the only category that allows activities such as heavy manufacturing/assembly, agricultural processing, and vehicular salvage. These uses are potentially disruptive to their surroundings, and must be located in districts that provide separation from other uses. Other activities restricted to industrial categories include:

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- Light manufacturing/assembly: This use is divided into two classes: Class A, which does not allow outdoor storage or “processing of equipment or materials,” and Class B, which does. Class A level activities are also allowed in the R/O/R and CG categories, but only as secondary uses. No other category allows Class B uses in any capacity.
- Storage/warehouse: This use is divided into two classes: Class A, which restricts most activities to enclosed buildings and restricts outdoor storage to incidental uses as long as they do not exceed 20 percent of the site’s building area, and Class B, which does not. The CG category allows Class A activities as a primary use, and the CL category allows them as a secondary use, but no other category allows Class B activities.
- Wholesale/distribution: Similar to the storage/warehouse use above, this use is divided into two classes: Class A, which restricts most activities to enclosed buildings and restricts outdoor storage to incidental uses as long as they do not exceed 20 percent of the site’s building area, and Class B, which does not. The CG category allows Class A activities as a primary use, and the CL category allows them as secondary uses, but no other category allows Class B activities.

Table C-3 below shows the uses allowed in each category. Of the two industrial categories, IL has the most flexibility. It allows all of the identified target industry uses except for heavy manufacturing/assembly, and is protected from encroachment by residential uses through required buffering. However, some target industries that engage in manufacturing activities may require the IG category, since they may need outdoor storage and/or the ability to process materials. For businesses that are not primarily engaged in manufacturing or distribution, the Residential/Office Limited (R/OL), Residential/Office General (R/OG), Residential/Office/Retail (R/O/R), Commercial General (CG), Commercial Limited (CL), and Commercial Neighborhood (CN) categories are available as alternatives.

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Table C-3
Allowable Primary (Pri) and Secondary (Sec) Uses for
Future Land Use Categories that Support Employment

| Allowable Use | IL | IG | R/OL | R/OG | R/O/R | CG | CN | CL |
|--|-------|-----|------|------|-------|-----|-----|-----|
| Agricultural Processing | | Pri | | | | | | |
| Ancillary Non-Residential | | | Sec | Sec | Sec | | | |
| Commercial Recreation | Sec | Sec | | | | Sec | | Sec |
| Commercial/Business Service | Sec | | | | Pri | Pri | Pri | Pri |
| Electric Power Generation Plant | | Sec | | | | | | |
| Heavy Manufacturing/Assembly | | Pri | | | | | | |
| Institutional | Sec | Sec | Sec | Sec | Sec | Sec | Sec | Sec |
| Light Manufacturing/Assembly (Class A) | Pri | Pri | | | Sec | Sec | | |
| Light Manufacturing/Assembly (Class B) | Pri | Pri | | | | | | |
| Office | Pri | | Pri | Pri | Pri | Pri | Pri | Pri |
| Personal Service/Office Support | Sec | | Sec | Sec | Pri | Pri | Pri | Pri |
| Public Educational Facility | | | Sec | Sec | | | | |
| Recreation/Open Space | Sec | Sec | Sec | Sec | Sec | Sec | Sec | Sec |
| Research/Development | Pri | Pri | | | Sec | Sec | | |
| Residential | Sec * | | Pri | Pri | Pri | Sec | Sec | Sec |
| Residential Equivalent | | | Sec | Sec | Pri | Sec | Sec | Sec |
| Retail Commercial | Sec | | | | Pri | Pri | Pri | Pri |
| Solid Waste/Refuse Disposal | | Sec | | | | | | |
| Storage/Warehouse (Class A) | Pri | Pri | | | | Pri | | Sec |
| Storage/Warehouse (Class B) | Pri | Pri | | | | | | |
| Transfer/Recycling | Sec | Sec | | | | | | |
| Transient Accommodation | Sec | | | | Pri | Pri | | Pri |
| Transportation/Utility | Sec | Sec | Sec | Sec | Sec | Sec | Sec | Sec |
| Vehicular Salvage | | Pri | | | | | | |
| Wholesale/Distribution (Class A) | Pri | Pri | | | | Pri | | Sec |
| Wholesale/Distribution (Class B) | Pri | Pri | | | | | | |

Source: *Countywide Plan Rules*, 2007

* Subject to master development plan approved by the CPA

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The allowable floor area ratios (FAR), impervious surface ratios (ISR), and dwelling units (DU) per acre for each category are compared in Table C-4 below.

Table C-4
Densities and Intensities for
Various Future Land Use Categories

| Category | FAR Max./Std. | ISR Max./Std. | Maximum D.U./Acre | Traffic Rate (ADT/Acre) |
|-----------------------------------|------------------|------------------|----------------------|----------------------------|
| Industrial Limited (IL) | .65/.39 | .85/.65 | -- | 170 |
| Industrial General (IG) | .75/.45 | .95/.72 | -- | 199 |
| Residential/Office/Limited (R/OL) | .40/.24 | .75/.56 | 7.5 | 119 |
| Residential/Office/General (R/OG) | .50/.30 | .75/.56 | 15.0 | 170 |
| Residential/Office/Retail (R/O/R) | .40/.24 | .85/.65 | 18.0 | 336 |
| Commercial Limited (CL) | .45/.27 | .85/.65 | 18.0 | 364 |
| Commercial General (CG) | .55/.33 | .90/.68 | 24.0 | 465 |
| Commercial Neighborhood (CN) | .40/.24 | .80/.60 | 10.0 | 350 |

Source: *Countywide Plan Rules*, 2007

Overall, the most flexible future land use categories for target industry development are IL, IG, R/O/R, CG, and CL. Each of these categories allows various industrial and commercial uses as primary or secondary uses. However, the nonindustrial categories cannot be used at the same intensity as industrial categories.

2. Special Designations

The Countywide Plan and Rules also offer some specialized future land use categories. Special designations for Activity Center Overlays, Community Redevelopment Districts, and Central Business Districts allow for greater flexibility in development, but require special area plans (SAPs) to implement.

Each SAP is tailored to the unique circumstances of the area it covers, and may be allowed to override many of the density and intensity limits of regular future land use categories, as long as it stays within broad guidelines. While the adoption of a SAP garners more intense scrutiny from the Countywide Planning Authority than a simple future land use change, it allows a municipality to create an area tailored to its own needs.

These special designation categories can usually contain industrial uses as long as the SAP allows them, although for the Activity Center Overlay, the underlying future land use category must also allow them. A summary of each special designation is included in Table C-5 below.

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**Table C-5
Comparison of Special Designations**

| Category | Description | Density | Minimum Area |
|----------------------------------|---|--|----------------|
| Activity Center Overlay | Intended for “concentrated and cohesive” development that facilitates mixed use development as “focal points” of “countywide significance.” Allows industrial uses only if the underlying category is industrial. | Up to 2.5 times the normally allowable density of the underlying future land use category. | 50 acres |
| Community Redevelopment District | Intended for the redevelopment of “community centers and neighborhoods” which are “focal points for a community.” Allows industrial uses. | “Consistent with the redevelopment strategy for this category and shall generally parallel the medium to high density standards” of the related future land use categories. | None Specified |
| Central Business District | Intended for the redevelopment of urban centers. Allows industrial uses. | “Consistent with the redevelopment strategy for this category and shall generally be at or above the highest density/intensity standards” of the related future land use categories. | None Specified |

Because of the flexibility inherent in the special designations, there is support for at least some target industries in each. However, each has both advantages and disadvantages:

- The Activity Center Overlay special designation allows an underlying land use category to be at a much greater intensity than would otherwise be allowed. This means that any of the future land use categories that already allow target industry uses could potentially be used. However, the designated area must be at least 50 acres in size to be eligible for this overlay.
- The Community Redevelopment District has more flexible rules than an Activity Center Overlay. It relies on a special area plan to set forth allowable uses, densities, and intensities. The designation is intended to be used for neighborhood or local employment centers, but depending on the surrounding uses, may not be suitable for more intensive target industry employers.
- The Central Business District designation is similar to the Community Redevelopment District, but is intended to support urban centers such as a city’s downtown. It also is controlled by a special area plan and has few limits on what can occur within it. However, since this designation is intended to be used for urban downtowns, which frequently contain residential and retail uses, certain target industry uses may not be compatible.

Target Employment and Industrial Land Study for the Pinellas Community

3. Planned Redevelopment Categories

Categories in the Planned Redevelopment classification also rely on SAPs, and have more flexibility than standard future land use categories. However, the three categories that support target industries (Mixed Use, Commercial, and Industrial) restrict allowable uses to those that occur within the major classification of the same name. For example, allowable uses in the Commercial planned redevelopment category are limited to those allowed in the Commercial classification, which includes the Commercial General, Commercial Neighborhood, and Commercial Limited categories. The three categories are compared in Table C-6.

Table C-6
Planned Redevelopment Land Use Categories

| Planned Redevelopment Category | Description | Density | Minimum Area |
|--------------------------------|---|--|--------------|
| Mixed Use | Intended to “facilitate infill and redevelopment” in areas that are currently developed in a mixed-use pattern along corridors and in other appropriate areas. Uses are limited to those allowed in mixed-use future land use categories, and they only allow industrial uses as secondary uses and only at Class A intensity. | Consistent with other mixed-use categories and/or as specified in the area’s special area plan. | 10 Acres |
| Commercial | Intended to “facilitate infill and redevelopment” in areas that “developed with intensive commercial uses.” But also may contain some residential development. Uses are limited to those allowed in commercial future land use categories, and they only allow industrial uses as secondary uses and only at Class A intensity. | Consistent with other commercial categories and/or as specified in the area’s special area plan. | 10 Acres |
| Industrial | Intended to “help to create a desirable employment district” in areas that “are developed with intensive business uses generating extensive employment activity.” Uses are limited to those allowed in industrial future land use categories, and they allow all industrial uses. | Consistent with other industrial categories and/or as specified in the area’s special area plan. | 10 Acres |

Source: *Countywide Plan Rules*, 2007

Target Employment and Industrial Land Study for the Pinellas Community

C. Transferable Development Rights

The *Countywide Plan Rules* also allow for the adoption of transferable development rights (TDRs). Generally, TDRs will only occur in areas with special area plans in place that allow them. These TDRs allow for development rights on one piece of property to be transferred from a sending property to a receiving property, provided that:

- Both properties are classified in the same *Countywide Future Land Use Plan Map* category;
- The sending property is already developed (unless the transfer is for archaeological, historical, or architectural purposes; or pursuant to a redevelopment plan)
- The density on the receiving property does not exceed *Countywide Plan Rules* except:
 - In the case of CBD/CRD areas covered by a special area plan;
 - If the parcel is receiving rights from archaeological, historical, or architectural sites, it may receive a 20 percent bonus;
 - If the parcel is in a designated redevelopment area, it may also receive a 20 percent bonus in addition to any other permitted density increase.

D. Summary

At least theoretically, the *Countywide Plan Rules* contains enough variety in its land use classifications to support virtually any target industry that would wish to locate or remain in Pinellas County. However, each category allows a relatively narrow range of uses or requires that certain conditions be met. This means that a business must be able to find adequately-sized, appropriately-located real estate that either has, or can be redesignated to, a specific future land use category that can accommodate its particular mix of activities. These limitations make it difficult for Pinellas County to encourage target industry attraction, retention, and expansion, and point to a need for more flexible categories or the use of other regulatory techniques. Potential strategies to address these issues are presented in chapters 4 and 5.

Target Employment and Industrial Land Study for the Pinellas Community

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Target Employment and Industrial Land Study for the Pinellas Community

Appendix D: Building Typologies

As part of the *Pinellas County Industrial Land Study*, a review was conducted of building types commonly sought by businesses in the current real estate marketplace. Business publications and planning sources were reviewed to identify a set of prototypical characteristics for industrial and office buildings. This research is intended to allow comparisons of the county's existing building stock with national and regional demand, toward the goal of providing additional understanding of the needs of target industries that may seek to locate or expand here.

A. Industrial Building Types and Characteristics

1. Warehouse/Distribution Facilities

Businesses that seek this building type require maximum flexibility in floor space at a low cost. The buildings are typically large and one-story, with a square or rectangular shape. They tend to be located in suburban areas where land costs are low and highway access is good. These businesses tend to employ “just-in-time” delivery of goods, which requires less square footage for storage. The addition of offices and limited retail space is also common.



Valpak
St. Petersburg

Typical characteristics:

- One-story buildings, 24 to 30 feet in height
- Focus on storage and handling of materials
- Easy access to transportation facilities, including rail for heavier uses
- Dock for high truck loading
- Grade-level doors for secured truck deliveries
- 120-foot truck maneuvering space in front of doors
- Parking ratio of 1 to 2 spaces per 1,000 square feet of building
- Trailer storage

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2. Manufacturing and Assembly Facilities

Businesses that seek this building type require a floor area range from 25,000 to 200,000 square feet. Buildings are usually one-story that rarely exceed 32 feet. Because of the need to run large amounts of machinery, the demand for power is typically higher for these facilities than for other types of industrial buildings.

These businesses typically seek to attract and retain skilled employees by providing a high-amenity workplace environment. There are higher fire protection and life safety standards than for warehouses, and climate control is necessary. Security of the site is important, both for the employees and for the manufacturing equipment and products. Because the density of employees is higher than in a warehouse, parking to floor area ratios need to be higher. The buildings must also be equipped with a telecommunications network sufficient to meet the demands of global trade.

Typical characteristics:

- Smaller than warehouse buildings
- Separate entrances for cars, trucks, and employees
- Public parking ratio of 2 to 6 spaces per 1,000 square feet
- Emphasis on landscaping and employee and site security



CSS, Inc.
Oldsmar



Halkey Roberts
St. Petersburg

Target Employment and Industrial Land Study for the Pinellas Community

3. Flexible Space Facilities

This is the most common industrial building type. Typical buildings range from 20,000 to 100,000 square feet and have an average use distribution of 25 percent office space and 75 percent warehouse space. These rectangular buildings commonly have a building depth up to 125 feet.

More parking is required in this type of building than in warehouses, but like the building itself, parking spaces must be flexible enough to be converted to other uses if needed. Delivery of goods or materials can be accommodated through rear drive-in areas or elevated docks, but not all businesses require these dedicated facilities. High-quality telecommunications networks are critical.

Typical characteristics:

- One or two-story buildings
- Truck access at grade or dock-high
- Parking ratio of 4 to 5 spaces per 1,000 square feet
- Curb appeal, campus setting, and 24-hour security



Bokova Industrial Center
Oldsmar



Young-Rainey STAR Center
Unincorporated Pinellas County

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4. Research/Development Facilities

This building type is designed for one or two tenants, and requires a higher level of finishing in an attractive lobby component that is not seen in other types. The typical building has up to 50 percent office/dry lab space, with the remainder used for wet lab, workshop, storage, and other support space. Overall building sizes range from 30,000 to 100,000 square feet.



Nielsen Media Research
Oldsmar

Visibility from roadways, security, and flexibility in space design are all important. Rectangular or square buildings are the most adaptable, and some tenants will want a showroom or demonstration studio. Clean rooms and isolation rooms may be needed. The building must be equipped for 24 hours a day operations, including with the ability to control power outages via standby power or cogeneration. Truck delivery facilities are at grade. Convenient access to highways, transit, and amenities are important, and a campus environment is preferred.

Typical characteristics:

- Combination of office and laboratories
- Variable user needs
- One-story with mezzanine, or two-story
- Higher employee density than warehouses or manufacturing and assembly buildings
- Parking ratio of 3 to 5 spaces per 1,000 square feet
- Greater open space and site amenity with distinctive architecture



Brooker Creek Industrial Area
Oldsmar

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5. Office/Showroom Facilities

This building type functions as an industrial shopping center. Office/ showroom facilities are typically one-story buildings that range from 60 to 100 feet deep and 24 to 30 feet wide units. They feature front glass and entrance doors leading to showrooms in front and small office spaces. Space for warehousing, assembly, and other functions is contained in back, with at-grade rear truck doors allowing for deliveries.



ScanDesign
St. Petersburg

While the building may include multiple tenants, and the exterior design of their respective sections may vary, the signage for the various uses is generally coordinated in appearance.

Typical characteristics:

- Quasi-commercial centers
- Customer access in front, truck access in rear
- Parking ratio of 2 to 4 spaces per 1,000 square feet
- Truck access at-grade
- Separate electrical power meters for each user

Target Employment and Industrial Land Study for the Pinellas Community

B. Office Building Types and Characteristics

1. General Design Characteristics

High-quality office space is critically important to the expansion, retention, and attraction of target industries to the county. These buildings fulfill the need.

Typical characteristics:

- Site configuration that allows for vehicular and pedestrian circulation
- Typical parking standards of 3.3 spaces per 1,000 square feet of rentable space
- Location, orientation, and views of buildings
- Delivery areas that are separate from visitor areas
- Security and lighting that is adequate for 18 to 24 hour business days
- Uninterrupted power supply sufficient to operate computers and office equipment
- Advanced telecommunications (high speed wire access to the internet, advanced fiber optic cabling, satellite dishes, and ample electricity)
- Telecommunication cabling system in under floor conduits and in vertical columns



Ceridian Benefits
St. Petersburg



EpiCenter
Largo

The following characteristics will vary according to the needs of individual tenants:

- Building size
- Office space design
- Lobby design
- Loading requirements

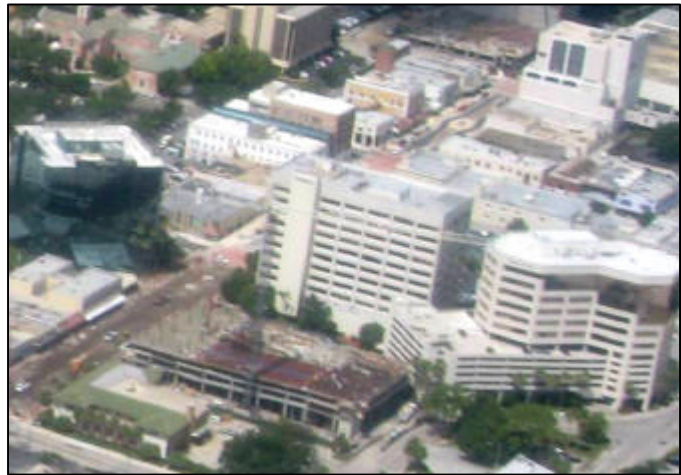
Target Employment and Industrial Land Study for the Pinellas Community

2. Urban Office Locations

The Central Business Districts of St. Petersburg and Clearwater provide the county with its most urban environments. The concentration of urban mid- to high-rise office development is the greatest in these locations. The businesses that choose these locations seek a “sense of place” with established amenities, such as convenient access to mass transportation, and synergy with other uses.

Typical characteristics:

- Multistory buildings
- Typically 20,000 to 25,000 square feet per floor
- Mid-rises have a FAR of 2.0 and higher
- High-rises have a FAR of 20.0 or higher
- Rectangular and square buildings most common
- Command high rents because of the provided amenities



Central Business District
Clearwater

3. Suburban Office Locations

Suburban locations offer convenient access to, and visibility from, highways and other principal arterials. For example, the Carillon area of St. Petersburg contains a significant concentration of high-wage employment in a suburban setting.

Typical characteristics:

- FARs range from 0.25 to 1.0
- A 1.0 FAR typically yields multistory buildings with structured parking
- Attention to parking lot location and design
- Building shape varies
- Office buildings typically have a 18,000 to 30,000 square feet per floor



Aegon
St. Petersburg

Target Employment and Industrial Land Study for the Pinellas Community

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Target Employment and Industrial Land Study for the Pinellas Community

Appendix E: Ordinances and Resolutions

The Pinellas Planning Council, Countywide Planning Authority, and Board of County Commissioners have adopted ordinances and resolutions that have attempted to address the industrial land conversion issue. Chapter 4 of this study contains a discussion of their content. This appendix contains copies of the relevant ordinances and resolutions, namely:

- Ordinance No. 06-52
- Ordinance No. 06-61
- PPC Resolution No. 06-3
- Board of County Commissioners Resolution No. 06-55

ORDINANCE NO. 06-52

AN ORDINANCE AMENDING PINELLAS COUNTY ORDINANCE NO. 89-4, AS AMENDED, THE COUNTYWIDE PLAN ADOPTION ORDINANCE, BY AMENDING THE "RULES CONCERNING THE ADMINISTRATION OF THE COUNTYWIDE FUTURE LAND USE PLAN," AS AMENDED; PROVIDING FOR AMENDMENT OF SUBTHRESHOLD AMENDMENT TYPES BY NO LONGER PERMITTING AMENDMENTS FROM INDUSTRIAL LIMITED AND INDUSTRIAL GENERAL TO BE CONSIDERED SUBTHRESHOLD; BY REDUCING THE TYPE "C" SUBTHRESHOLD AMENDMENT SIZE FROM 10 ACRES TO 5 ACRES; BY REDUCING THE RESIDENTIAL DENSITY THAT QUALIFIES AS A TYPE "C" SUBTHRESHOLD AMENDMENT FROM 10 UNITS PER ACRE OR LESS TO 7.5 UNITS PER ACRE OR LESS; BY ADDING A REFERENCE IN THE SUBTHRESHOLD AMENDMENT TYPE TABLE TO TABLE TWO OF SECTION 4.2.7.1 FOR LIMITATIONS ON AMENDMENTS THAT ARE ADJACENT TO A SCENIC/NON-COMMERCIAL CORRIDOR; PROVIDING FOR SEVERABILITY; PROVIDING FOR AN EFFECTIVE DATE; AND PROVIDING FOR MODIFICATION THAT MAY ARISE FROM CONSIDERATION OF THE ORDINANCE AT PUBLIC HEARING.

WHEREAS, the Board of County Commissioners acting as the Countywide Planning Authority has adopted a Countywide Comprehensive Plan by adoption of Ordinance No. 89-4 on January 31, 1989; and

WHEREAS, as part of Ordinance 89-4, the Board also adopted the Rules Concerning the Administration of the Countywide Future Land Use Plan (Countywide Rules) and subsequently amended said Countywide Rules by Ordinances Nos. 89-66A, 91-5, 92-4, 92-51, 93-112, 94-20, 94-55, 95-78, 96-17, 96-32, 96-47, 96-55, 96-87, 97-71, 98-41, 99-22, 99-76, 00-60, 01-16, 03-23, 04-5, and 05-49; and

WHEREAS, the Pinellas Planning Council, pursuant to Section 5(7)(b), Chapter 88-464, Laws of Florida, as amended, is authorized to develop rules, standards, policies and objectives that will implement the Countywide Future Land Use Plan; and

WHEREAS, the Pinellas Planning Council pursuant to Section 10(4)(a) of Chapter 88-464, Laws of Florida, as amended, is authorized to initiate amendment to a rule, standard, policy or objective of the Countywide Future Land Use Plan, as determined necessary by the Council to establish effective countywide planning; and

WHEREAS, the Pinellas Planning Council, pursuant to Section 10, Paragraph 4 of Chapter 88-464, Laws of Florida, as amended, has forwarded its recommended action on amendment of the Countywide Rules, as amended, to the Board of County Commissioners acting in their capacity as the Countywide Planning Authority, as set forth in PPC Resolution No. 2006-2 dated May 17, 2006; and

WHEREAS, the procedures of Chapter 88-464, Laws of Florida, as amended, and the County Charter have been followed by the Pinellas Planning Council and the Board of County Commissioners acting as the Countywide Planning Authority, concerning this proposed amendment of the Countywide Rules, as amended; and

WHEREAS, the notice of public hearings and advertisements have been accomplished as required by Chapter 88-464, Laws of Florida, as amended; and

WHEREAS, the Board of County Commissioners of Pinellas County, Florida, acting in their capacity as the Countywide Planning Authority, desires to amend the Countywide Rules, as amended, for Pinellas County, Florida, to protect Industrial Limited and Industrial General lands as discussed and contained within *Pinellas by Design, An Economic Development and Redevelopment Plan for the Pinellas Community*, as set forth herein.

NOW THEREFORE, BE IT ORDAINED BY THE BOARD OF COUNTY COMMISSIONERS OF PINELLAS COUNTY, FLORIDA:

SECTION 1. The portions of Article 5, Section 5.3, Subthreshold Amendment Types, are hereby amended as set forth below. All other portions of Article 5 are preserved and remain as previously set forth in the Countywide Rules:

SEC. 5.3.4 SUBTHRESHOLD AMENDMENT TYPES

| Types of Threshold | Maximum Size of Amendment | Plan Classification/ Category of Amendment ¹ | Adjacent to Scenic Corridor | Aggregation Limit Per Year ² |
|--------------------|---------------------------|--|-----------------------------|---|
| A. | 1 Ac. | Any | Not Eligible | 30 Ac. |
| B. | 3 Ac. | Same Classification Only | Not Eligible | 30 Ac. |
| C. | 5 Ac. | Residential at 7.5 units/ac. or less | See Section 4.2.7.1 Table 2 | 30 Ac. |
| D. | No Limit | Same Classification Only - Less Intensive Category | Not Applicable | Not Applicable |
| E. | No Limit | Water/DF, Rec./OS & Pres. Categories Only; excluding from Pres. to Rec./OS | Not Applicable | Not Applicable |
| F. | See Section 5.3.4.6 | | | |

Countywide Plan Map amendments to Residential Very High, Activity Center/Primary, Activity Center/Secondary, Community Redevelopment District, and Central Business District shall not be considered as subthreshold amendments. Additionally, amendments from Industrial Limited or Industrial General shall not be considered subthreshold amendments.

² Type A, B and C Aggregation Limits Are Cumulative.

- 5.3.4.1 Type A. Except as specifically excluded herein, amendments of one (1) acre or less, irrespective of the Countywide Plan Map classification or category from which and to which the amendment is sought, (e.g., from Residential Low to Industrial Limited) are subthreshold. The subthreshold status does not apply to amendments located on a Scenic/Non-Commercial Corridor. Type A subthreshold status is subject to a thirty (30) acre per year aggregation limit (Type A + B + C) for each local government.
- 5.3.4.2 Type B. Except as specifically excluded herein, amendments of three (3) acres or less within the same major classification only (e.g., from Commercial Neighborhood to Commercial General) are subthreshold - subject to the limitations on Scenic/Non-Commercial Corridors, and the thirty (30) acre aggregation limit (Type A + B + C).
- 5.3.4.3. Type C. Amendments up to five (5) acres where the density does not exceed seven and a half (7.5) units/acre (e.g., Residential Urban) are subthreshold - without limitations except as outlined in Section 4.2.7.1, Table 2, and the thirty (30) acre aggregation limit (Type A + B + C).
- 5.3.4.4 Type D. Amendments irrespective of size, providing they are within the same classification and made from a more intensive category to a less intensive category are subthreshold (e.g., from Residential High to Residential Medium). There are no limitations as to location or aggregation.
- 5.3.4.5 Type E. Amendments of any size to the Water/Drainage Feature, Recreation/Open Space, and Preservation categories are subthreshold - without limitation, except from Preservation to Recreation/Open Space which shall be considered as a Type B subthreshold amendment.
- 5.3.4.6 Type F. All amendments that are ineligible as Type A through E subthreshold amendments shall be reviewed to determine whether they involve, and therefore must be considered as a regular amendment pursuant to, the enumerated Relevant Countywide Considerations in Section 5.5.3 of these Countywide Rules. The amendment shall be treated as a subthreshold amendment if:
1. The amendment is consistent with Article IV, Plan Criteria and Standards of these Countywide Rules and with the Countywide Plan as implemented through the Countywide Rules.
 2. The amendment does not negatively impact a roadway segment where the existing Level of Service (LOS) is below LOS "D" or where projected traffic resulting from the amendment would cause the existing LOS to fall below LOS "D".
 3. The amendment is not located within a designated Scenic/Non-Commercial Corridor as delineated on the *Countywide Scenic/Non-Commercial Corridor Map, (Submap No. 1.)*
 4. The amendment is not located within a designated Coastal High Hazard Area.
 5. The amendment does not involve the creation, expansion, or contraction of a Residential Very High (RVH), Activity Center/Primary (AC/P), Activity

Center/Secondary (AC/S), Community Redevelopment District (CRD), or Central Business District (CBD) Countywide Plan Map category.

6. The amendment is not located adjacent to another jurisdiction and does not significantly impact a public education facility.

SECTION 2. Severability. It is declared to be the intent of the Board of County Commissioners that if any section, subsection, sentence, clause, phrase, or provision of this ordinance is held invalid or unconstitutional, such invalidity or unconstitutionality shall not be construed as to render invalid or unconstitutional the remaining provisions of this ordinance.

SECTION 3. Filing of Ordinance; Effective Date. Pursuant to Section 125.66, Florida Statutes, a certified copy of this Ordinance shall be filed with the Department of State by the Clerk of the Board of County Commissioners within ten (10) days after enactment by the Board of County Commissioners. This Ordinance shall become effective upon filing with the Department of State.

STATE OF FLORIDA

COUNTY OF PINELLAS

I, KEN BURKE, Clerk of the Circuit Court and Ex-officio Clerk to the Board of County Commissioners, in and for the State and County aforesaid, DO HEREBY CERTIFY that the foregoing is a true and correct copy of an Ordinance adopted by the Board of County Commissioners of Pinellas County, Florida, on June 20, 2006 relative to:

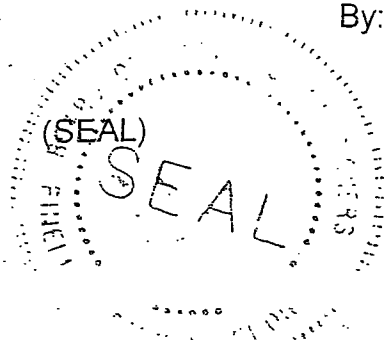
ORDINANCE NO. 06-52

AN ORDINANCE AMENDING PINELLAS COUNTY ORDINANCE NO. 89-4, AS AMENDED, THE COUNTYWIDE PLAN ADOPTION ORDINANCE, BY AMENDING THE "RULES CONCERNING THE ADMINISTRATION OF THE COUNTYWIDE FUTURE LAND USE PLAN," AS AMENDED; PROVIDING FOR AMENDMENT OF SUBTHRESHOLD AMENDMENT TYPES BY NO LONGER PERMITTING AMENDMENTS FROM INDUSTRIAL LIMITED AND INDUSTRIAL GENERAL TO BE CONSIDERED SUBTHRESHOLD; BY REDUCING THE TYPE "C" SUBTHRESHOLD AMENDMENT SIZE FROM 10 ACRES TO 5 ACRES; BY REDUCING THE RESIDENTIAL DENSITY THAT QUALIFIES AS A TYPE "C" SUBTHRESHOLD AMENDMENT FROM 10 UNITS PER ACRE OR LESS TO 7.5 UNITS PER ACRE OR LESS; BY ADDING A REFERENCE IN THE SUBTHRESHOLD AMENDMENT TYPE TABLE TO TABLE TWO OF SECTION 4.2.7.1 FOR LIMITATIONS ON AMENDMENTS THAT ARE ADJACENT TO A SCENIC/NON-COMMERCIAL CORRIDOR; PROVIDING FOR SEVERABILITY; PROVIDING FOR AN EFFECTIVE DATE; AND PROVIDING FOR MODIFICATION THAT MAY ARISE FROM CONSIDERATION OF THE ORDINANCE AT PUBLIC HEARING.

IN WITNESS WHEREOF, I hereunto set my hand and official seal this June 27, 2006.

KEN BURKE
Clerk of the Circuit Court
and Ex-officio Clerk to the
Board of County Commissioners

By: 
Linda R. Reed, Deputy Clerk



ORDINANCE NO. 06-61

AN ORDINANCE AMENDING PINELLAS COUNTY ORDINANCE NO. 89-4, AS AMENDED, THE COUNTYWIDE PLAN ADOPTION ORDINANCE, BY AMENDING THE "RULES CONCERNING THE ADMINISTRATION OF THE COUNTYWIDE FUTURE LAND USE PLAN," AS AMENDED; PROVIDING FOR AMENDMENT OF COUNTYWIDE PLAN MAP CLASSIFICATIONS AND CATEGORIES, INCLUDING CREATION OF A NEW "PLANNED REDEVELOPMENT" CLASSIFICATION WITH CATEGORIES INCLUDING "RESIDENTIAL," "MIXED-USE," "COMMERCIAL" AND "INDUSTRIAL"; AMENDING THE "SPECIAL DESIGNATIONS" CLASSIFICATION BY RENAMING THE "ACTIVITY CENTER-PRIMARY" CATEGORY TO "ACTIVITY CENTER" AND DELETING THE "ACTIVITY CENTER/SECONDARY" CATEGORY; REQUIRING SPECIAL AREA PLANS FOR THE "PLANNED REDEVELOPMENT" CLASSIFICATION CATEGORIES; SPECIFYING THE REQUIREMENTS FOR A SPECIAL AREA PLAN; SPECIFYING THAT THAT PLANNED REDEVELOPMENT AMENDMENTS CANNOT BE CONSIDERED SUBTHRESHOLD; PROVIDING FOR SEVERABILITY; PROVIDING FOR AN EFFECTIVE DATE; AND PROVIDING FOR MODIFICATION THAT MAY ARISE FROM CONSIDERATION OF THE ORDINANCE AT PUBLIC HEARING.

WHEREAS, the Board of County Commissioners acting as the Countywide Planning Authority has adopted a Countywide Comprehensive Plan by adoption of Ordinance No. 89-4 on January 31, 1989; and

WHEREAS, as part of Ordinance 89-4, the Board also adopted the Rules Concerning the Administration of the Countywide Future Land Use Plan (Countywide Rules) and subsequently amended said Countywide Rules by Ordinances Nos. 89-66A, 91-5, 92-4, 92-51, 93-112, 94-20, 94-55, 95-78, 96-17, 96-32, 96-47, 96-55, 96-87, 97-71, 98-41, 99-22, 99-76, 00-60, 01-16, 03-23, 04-5, 05-49, and 06-52; and

WHEREAS, the Pinellas Planning Council, pursuant to Section 5(7)(b), Chapter 88-464, Laws of Florida, as amended, is authorized to develop rules, standards, policies and objectives that will implement the Countywide Future Land Use Plan; and

WHEREAS, the Pinellas Planning Council pursuant to Section 10(4)(a) of Chapter 88-464, Laws of Florida, as amended, is authorized to initiate amendment to a rule, standard, policy or objective of the Countywide Future Land Use Plan, as determined necessary by the Council to establish effective countywide planning; and

WHEREAS, the Countywide Plan and *Pinellas by Design, An Economic Development and Redevelopment Plan for the Pinellas Community* recognize a need to address the special needs of a built-out county through plans and regulations that are tailored to each community's redevelopment objectives; and

WHEREAS, The Pinellas Planning Council and Countywide Planning Authority desire to amend the Countywide Rules in order to provide alternatives to local governments to adopt customized special area plans and land development regulations that will allow them to redevelop in a unique and detailed manner that addresses both local and

countywide issues, and

WHEREAS, the Pinellas Planning Council, pursuant to Section 10, Paragraph 4 of Chapter 88-464, Laws of Florida, as amended, has forwarded its recommended action on amendment of the Countywide Rules, as amended, to the Board of County Commissioners acting in their capacity as the Countywide Planning Authority, as set forth in PPC Resolution No. 06-4 dated June 21, 2006; and

WHEREAS, the procedures of Chapter 88-464, Laws of Florida, as amended, and the County Charter have been followed by the Pinellas Planning Council and the Board of County Commissioners acting as the Countywide Planning Authority, concerning this proposed amendment of the Countywide Rules, as amended; and

WHEREAS, the notice of public hearings and advertisements have been accomplished as required by Chapter 88-464, Laws of Florida, as amended; and

WHEREAS, the Board of County Commissioners of Pinellas County, Florida, acting in their capacity as the Countywide Planning Authority, desires to amend the Countywide Rules, as amended, for Pinellas County, Florida, as set forth herein.

NOW THEREFORE, BE IT ORDAINED BY THE BOARD OF COUNTY COMMISSIONERS OF PINELLAS COUNTY, FLORIDA:

SECTION 1. The portions of Article 2. Countywide Plan Map Classifications and Categories, are hereby amended as set forth below. All other portions of Article 2 not included in this ordinance are preserved and remain as previously set forth in the Countywide Rules:

SEC. 2.3.2 LEGEND.

2.3.2.1 The Countywide Plan Map and the Countywide Rules, as amended, provide for the major classifications, specific categories and symbols applicable to the Countywide Plan Map and Countywide Rules as set forth below:

| <u>Plan Classifications</u> | <u>Plan Categories</u> | <u>Plan Symbols</u> |
|-----------------------------|----------------------------|---------------------|
| 1. Residential: | Residential Rural | RR |
| | Residential Estate | RE |
| | Residential Suburban | RS |
| | Residential Low | RL |
| | Residential Urban | RU |
| | Residential Low Medium | RLM |
| | Residential Medium | RM |
| | Residential High | RH |
| | Residential Very High | RVH |
| 2. Mixed Use: | Residential/Office Limited | R/OL |
| | Residential/Office General | R/OG |

| | | |
|---------------------------|----------------------------------|----------|
| | Residential/Office/Retail | R/O/R |
| | Resort Facilities Overlay | RFO |
| | Resort Facilities Medium | RFM |
| | Resort Facilities High | RFH |
| 3. Commercial: | | |
| | Commercial Neighborhood | CN |
| | Commercial Limited | CL |
| | Commercial Recreation | CR |
| | Commercial General | CG |
| 4. Industrial: | | |
| | Industrial Limited | IL |
| | Industrial General | IG |
| 5. Public/Semi-Public: | | |
| | Preservation | P |
| | Recreation/Open Space | R/OS |
| | Institutional | I |
| | Transportation/Utility | T/U |
| 6. Planned Redevelopment: | | |
| | Residential | R |
| | Mixed-Use | MU |
| | Commercial | C |
| | Industrial | IND |
| 7. Special Designations: | | |
| | Water/Drainage Feature | As Noted |
| | Scenic/Non-Commercial Corridor | As Noted |
| | Activity Center | AC |
| | Community Redevelopment District | CRD |
| | Central Business District | CBD |

2.3.3.8 PLANNED REDEVELOPMENT CLASSIFICATION.

2.3.3.8.1 Category/Symbol – Residential (R).

Purpose - It is the purpose of this category to depict those areas of the County that are developed with a collection of residential uses, at the same or varying densities and building styles, in neighborhoods or distinct areas that are interrelated and complimentary. This category should facilitate infill and desired redevelopment of these neighborhoods or distinct areas while preserving the existing residential character. This category should help to create a desirable residential area by promoting aesthetically pleasing, safe, private residential environments, and buildings that are compatible with the area's character.

Use Characteristics - Those uses allowed in this category must be set forth in the required special area plan and shall be selected from and limited to the uses found in the Low, Medium, or High range of Residential Classifications in Sections 2.3.3.1 through 2.3.3.3, as specified in the local government's special area plan described in Section 4.2.7.5.

Locational Characteristics – The Locational Characteristics used with this category must be based on the density specified in the local government's special area plan and the commensurate Locational Characteristics found in the applicable plan categories under Sections 2.3.3.1 through 2.3.3.3 for the Low, Medium, and High range of Residential Classifications (with the exception of the Residential Very High – RVH category).

Traffic Generation Characteristics – The Traffic Generation Characteristics used with this category must correspond with the density specified in the local government's special area plan and the commensurate Traffic Generation Characteristics found in Sections 2.3.3.1 through 2.3.3.3 for the Low, Medium, and High range of Classifications (with the exception of the Residential Very High – RVH category), or as provided for by the local government in their special area plan, as appropriate to the specific density proposed.

Density/Intensity Standards – The density/intensity allowed in this category must be set forth in the required special area plan and shall be selected from and limited to that provided for in the respective residential plan category as found in the Low, Medium, or High range of Residential Classifications (with the exception of the Residential Very High – RVH category) in Sections 2.3.3.1 through 2.3.3.3.

Other Standards - Shall include the following:

- Area Requirements – This plan category shall be a minimum of ten (10) acres in size, must include neighborhoods or distinct areas that are interrelated and complimentary, and shall be of countywide significance. The Pinellas Planning Council and the Countywide Planning Authority may, at their discretion, consider a smaller area as requested and justified by the local government.
- Acreage Limitations -The following uses shall not exceed the respective acreage threshold designated for such uses. Any such use, alone or when added to existing contiguous like use(s), which exceeds the designated threshold shall require a plan map amendment that shall include such use and all contiguous like uses:

1. Ancillary Non-Residential; Transportation/Utility Use - Shall not exceed a maximum area of three (3) acres.
2. Institutional Use (except Public Educational Facilities which are not subject to this threshold) - Shall not exceed a maximum area of five (5) acres.

These uses shall be compatible with, and limit the negative impacts on, surrounding residential neighborhoods. Development standards for such uses shall be identified and referenced in the special area plan.

- Special Area Plan Required – The utilization of this category shall require a special area plan as set forth in Section 4.2.7.5.

2.3.3.8 PLANNED REDEVELOPMENT - CONT.

2.3.3.8.2 Category/Symbol – Mixed Use (MU).

Purpose - It is the purpose of this category to depict those areas of the County that are developed with a collection of residential, office, and commercial uses, along corridors, adjacent to neighborhoods or within distinct areas that are interrelated and complimentary. This category should facilitate infill and redevelopment of these areas to create a desirable mix of non-residential and residential uses by promoting aesthetically pleasing, safe environments, and buildings that are compatible with the area's character, uses, and transportation facilities.

Use Characteristics - Those uses allowed in this category must be set forth in the required special area plan and shall be selected from and limited to the uses found in the Mixed Use Classification in Section 2.3.3.4.

Locational Characteristics – The Locational Characteristics used with this category must correspond with the uses specified in the local government's special area plan and the commensurate Locational Characteristics found in the applicable plan category under Section 2.3.3.4 for the Mixed Use Classification.

Traffic Generation Characteristics – The Traffic Generation Characteristics used with this category must be based on the density/intensity specified in the local government's special area plan and the commensurate Traffic Generation Characteristics found in Section 2.3.3.4 for the Mixed Use Classification, or as appropriate to and provided for by the local government in their special area plan for density/intensity that exceeds the limits found in Section 2.3.3.4.

Density/Intensity Standards - The density/intensity standards are as found in each individual category in the Mixed Use Classification in Section 2.3.3.4, or as specified in the local government's special area plan described in Section 4.2.7.5, or combination thereof specifically set forth in the special area plan.

Other Standards - Shall include the following:

- Area Requirement – This plan category shall be a minimum of ten (10) acres in size, must include residential, and office, and/or commercial uses, along corridors, adjacent to neighborhoods or within distinct areas that are interrelated and complimentary, and shall be of countywide significance. The Pinellas Planning Council and the Countywide Planning Authority may, at their discretion, consider a smaller area as requested and justified by the local government.
- Acreage Limitations -The following uses shall not exceed the respective acreage threshold designated for such uses. Any such use, alone or when added to existing contiguous like use(s), which exceeds the designated threshold shall require a plan map amendment that shall include such use and all contiguous like uses:
 1. Ancillary Non-Residential; Transportation/Utility Use - Shall not exceed a maximum area of three (3) acres.
 2. Institutional Use (except Public Educational Facilities which are not subject to this threshold) - Shall not exceed a maximum area of five (5) acres.

These uses shall be compatible with, and limit the negative impacts on, surrounding mixed use areas. Development standards for such uses shall be identified and referenced in the special area plan.

- Special Area Plan Required – The utilization of this category shall require a special area plan as set forth in Section 4.2.7.5.

2.3.3.8 PLANNED REDEVELOPMENT - CONT.

2.3.3.8.3 Category/Symbol – Commercial (C).

Purpose - It is the purpose of this category to depict those areas of the County that are developed with intensive commercial uses and may include residential and office uses that are concentrated within distinct areas that are interrelated and complimentary. This category should facilitate infill and redevelopment of these areas to create a desirable and consolidated area of intensive commercial uses by promoting aesthetically pleasing, safe environments, and buildings that are compatible with the area's character, uses, and transportation facilities.

Use Characteristics - Those uses allowed in this category must be set forth in the required special area plan and shall be selected from and limited to the uses found in the Commercial Classification in Section 2.3.3.5.

Locational Characteristics – The Locational Characteristics used with this category must correspond with the uses specified in the local government's special area plan and the commensurate Locational Characteristics found in the applicable plan category under Section 2.3.3.5 for the Commercial Classification.

Traffic Generation Characteristics – The Traffic Generation Characteristics used with this category must be based on the density/intensity specified in the local government's special area plan and the commensurate Traffic Generation Characteristics found in Section 2.3.3.5 for the Commercial Classification, or as appropriate to and provided for by the local government in their special area plan for density/intensity that exceeds the limits found in Section 2.3.3.4.

Density/Intensity Standards - The density/intensity standards are as found in each individual category in the Commercial Classification in Section 2.3.3.5, or as specified in the local government's special area plan described in Section 4.2.7.5, or combination thereof specifically set forth in the special area plan.

Other Standards - Shall include the following:

- Area Requirements - This plan category shall be a minimum of ten (10) acres in size, include intensive commercial uses and may include residential and/or office uses that are concentrated into distinct areas that are interrelated and complimentary, and shall be of countywide significance. The Pinellas Planning Council and the Countywide Planning Authority may at their discretion consider a smaller area as requested and justified by the local government.
- Acreage Limitations – Institutional and Transportation/Utility uses shall not exceed a maximum area of five (5) acres. Any such use, alone or when added to existing contiguous like use(s), which exceeds the designated threshold shall require a plan map amendment that shall include such use and all contiguous like uses. These uses shall be compatible with, and limit the negative impacts on, surrounding commercial areas. Development standards for such uses shall be identified and referenced in the special area plan.
- Special Area Plan Required – The utilization of this category shall require a special area plan as set forth in Section 4.2.7.5.

2.3.3.8 PLANNED REDEVELOPMENT - CONT.

2.3.3.8.4 Category/Symbol – Industrial (IND).

Purpose - It is the purpose of this category to depict those areas of the County that are developed with intensive businesses generating extensive employment activity. These areas consist of a collection of manufacturing, office, institutional (i.e. higher educational or training facilities), and high-tech light industrial uses in areas that are interrelated and complimentary. This category should help to create a desirable employment district by promoting aesthetically pleasing, safe environments, interrelated uses, and buildings that are compatible with the stated character for the area.

Use Characteristics - Those uses allowed in this category must be set forth in the required special area plan and shall be selected from and limited to the uses found in the Industrial Classification in Section 2.3.3.6; Public Educational Facilities; Private Schools; Colleges; and Public Service Agencies that offer training and education for targeted industries.

Locational Characteristics – The Locational Characteristics used with this category must correspond with the uses specified in the local government's special area plan and the commensurate Locational Characteristics found in the applicable plan category under Section 2.3.3.6 for the Industrial Classification.

Traffic Generation Characteristics – The Traffic Generation Characteristics used with this category must be based on the density/intensity specified in the local government's special area plan and the commensurate Traffic Generation Characteristics found in Section 2.3.3.6 for the Industrial Classification, or as appropriate to and provided for by the local government in their special area plan for density/intensity that exceeds the limits found in Section 2.3.3.4.

Density/Intensity Standards - The density/intensity standards are as found in each individual category in the Industrial Classification in Section 2.3.3.6, or as specified in the local government's special area plan described in Section 4.2.7.5, or combination thereof specifically set forth in the special area plan.

Other Standards - Shall include the standards as found in each individual category in the Industrial Classification found in Section 2.3.3.6.

Standards and Master Development Plan Requirements for Industrial/Mixed Use Projects – Shall include the provisions as found in the Industrial Limited category.

- Area Requirement – This plan category shall be a minimum of ten (10) acres in size, include a collection of manufacturing, office, institutional (i.e., higher educational or training facilities), and high-tech light industrial uses in areas that are interrelated and complimentary, and shall be of countywide significance. The Pinellas Planning Council and the Countywide Planning Authority may at their discretion reduce this size as requested and justified by the local government.
- Special Area Plan Required – The utilization of this category shall require a special area plan as set forth in Section 4.2.7.5.

2.3.3.9 SPECIAL DESIGNATIONS.

2.3.3.9.1 Category/Symbol - Water/Drainage Feature (as noted on the Countywide Plan Map).

Purpose - It is the purpose of this category to depict those water bodies and drainage features, now committed to, or proposed to be recognized for, these respective functions based on their physical characteristics and use. Water bodies include ocean, estuary, lake, pond, river, stream and drainage detention areas. Drainage features recognize existing natural and man-made drainageways and water bodies, and proposed drainageways and water bodies, that are part of the Pinellas County Master Drainage Plan, as subsequently refined through the individual Watershed Management Plans, that are shown in the Stormwater Management Element of the respective local government Comprehensive Plans, or that are part of an approved site plan or other authorized development order action of the local government with jurisdiction.

Use Characteristics - Those uses appropriate to and consistent with this category include:

- Primary Uses - Open and undeveloped areas consistent with the water and/or drainage feature(s) which characterize these locations.
- Secondary Uses - Use characteristics limited to drainage structures/facilities, environmental restoration, and non-permanent open space and recreation uses consistent with the primary purpose of stormwater management in the case of the drainage feature designation used as the principal category (other than as an overlay); these same use characteristics plus those provided for in the underlying Countywide Plan Map category in the case of the drainage feature designation used as an overlay; and use characteristics provided for and located in the adjoining Countywide Plan Map category which are accessory to or are the extension of the permitted adjoining use in the case of a water feature.

Locational Characteristics - This category is designed to reflect water bodies and drainage features as defined herein and located on the Countywide Plan Map, as same may be revised from time to time through the map amendment or map adjustment process, and subject to their actual location on the ground.

Traffic Generation Characteristics - Not Applicable.

Density/Intensity Standards - Shall be as follows:

- Submerged Land; Drainage Feature (other than as an overlay) - No density/intensity allocation.
- Drainage Overlay (as an overlay) - As for the underlying category.

Other Standards - Shall include the following:

- Water bodies of three (3) or more acres shall be designated as Water/Drainage Feature on the Countywide Plan Map with the appropriate map symbol for water bodies. Drainage features shall be designated on the Countywide Plan Map when appropriate in accord with

these Countywide Rules using the appropriate map symbol for drainage facility.

- The drainage feature map symbol may be used as the principal category (other than as an overlay) or in combination with an underlying principal category (as an overlay).
- Water bodies of less than three (3) acres shall be as shown on the Countywide Plan Map based on the map as amended through September 30, 1995; and thereafter may be added or deleted at the request of the local government with jurisdiction through the map amendment or map adjustment process.

2.3.3.9 SPECIAL DESIGNATIONS - CONT.

2.3.3.9.2 Category/Symbol - Scenic/Non-Commercial Corridor (as noted on the Countywide Plan Map).

Purpose - See Article 4, Section 4.2.7, Special Rules, subsections 4.2.7.1.1 and 4.2.7.1.2

Use Characteristics - See applicable principal categories for specific use characteristics and "Countywide Plan Map/Corridor Classification - Consistency" (Article 4, Section 4.2.7.1.4 A) for correlation of the Countywide Plan Map categories and Corridor Subclassifications.

Locational Characteristics - Corridors shall be as set forth herein and depicted on the Countywide Plan Map and accompanying *FLUP Submap No. 1* entitled "*Countywide Scenic/Non-Commercial Corridor Map*", including:

"Primary" Corridors:

- **Keystone Road** from US 19 to Hillsborough County Line
- **Alderman Road** from US Alternate 19 to Fish Hatchery Road
- **Tampa Road** from US Alternate 19 to East Lake Woodlands Pkwy.
- **Curlew Road** from US Alternate 19 to McMullen-Booth Road
- **CR-1/Keene Road** from Alderman Road to East Bay Drive
- **Belcher Road** from Klosterman Road to 38th Avenue North
- **McMullen-Booth Road/East Lake Road** from Pasco County Line to SR-60
- **102nd Avenue North/Bryan Dairy Road** from Oakhurst Road to Belcher Road
- **Pinellas County Bayway** from Gulf Boulevard to US-19/I-275
- **113th Street/Ridge Road** from West Bay Drive to Madeira Beach Causeway
- **Park Street** from Park Boulevard to Central Avenue
- **Tyrone Boulevard** from 113th Street North to Park Street

"Unique" Corridors:

- **Edgewater Drive** from Scotland Street (Dunedin) to Sunset Point Road
- **Bayshore Drive** from Main Street (Safety Harbor) to SR-60
- **Courtney Campbell Parkway (Causeway)** from McMullen-Booth Road/Bayside Bridge (49th Street Bridge) to Hillsborough County Line
- **Dunedin Causeway** from Honeymoon Island Park to east approach
- **Memorial Causeway** and its approaches
- **Bayside Bridge (49th Street Bridge)** and its approaches
- **Gandy Bridge** approach to Hillsborough County Line
- **Howard Frankland Bridge (I-275)** approach to Hillsborough County Line
- **Belleair Causeway** and its approaches
- **Park Boulevard Bridge** and its approaches
- **Treasure Island Causeway** and its approaches
- **Pinellas Bayway (SR-679)** from Fort DeSoto Park to Pinellas County Bayway (SR-682)
- **Sunshine Skyway Bridge (I-275)** approach to Hillsborough County line

Traffic Generation Characteristics - The standard for the purpose of calculating typical traffic impacts relative to a Countywide Plan Map amendment for this category shall be based upon the respective principal categories.

Density/Intensity Standards - See applicable principal categories.

Other Standards - See Article 4, Section 4.2.7, Special Rules.

2.3.3.9 SPECIAL DESIGNATIONS - CONT.

2.3.3.9.3 Category/Symbol - Activity Center (AC).

Purpose - It is the purpose of this category to depict, utilizing an overlay, those areas of the county that are now developed, or appropriate to be developed, in a concentrated and cohesive pattern to facilitate mixed-use development as focal points of commerce, employment and housing of countywide significance; and to provide a mechanism whereby separate standards for density/intensity of use are employed, consistent with their special purpose, character, and capacity for service.

Use Characteristics - See applicable underlying categories.

Locational Characteristics - This category is generally appropriate to those concentrated commercial and mixed-use centers that are well-suited to a more intensive and integrated pattern of development; that are situated to serve a significant area of the countywide population; and to recognize and provide for those concentrated activity centers in a manner consistent with their relationship to adjoining uses and the transportation system, including mass transit. There will be two types of Activity Centers:

- These locations shall be a minimum of fifty (50) acres in size and shall be of countywide significance.
- The designated locations for activity centers shall include mixed land uses and may include regional shopping centers, major office and employment centers, public facilities, commercial recreation complexes, and high density residential.

Traffic Generation Characteristics - The standard for the purpose of calculating typical traffic impacts relative to an amendment for this category shall be based upon the underlying categories, adjusted to account for the proposed density/intensity within each category.

Density/Intensity Standards - Shall include the following:

- Shall not exceed 2.5 times otherwise permitted density/intensity.

Other Standards - Shall include the following:

- Special Area Plan Required -The utilization of this category shall require a special area plan as set forth in Section 4.2.7.5.

2.3.3.9 SPECIAL DESIGNATIONS - CONT.

2.3.3.9.4 Category/Symbol - Community Redevelopment District (CRD).

Purpose - It is the purpose of this category to depict those areas of the county that are now designated, or appropriate to be designated, as community centers and neighborhoods for redevelopment in accord with a special area plan therefor.

Use Characteristics - Those uses appropriate to and consistent with this category shall include:

- Primary Uses - Residential; Office; Commercial; Industrial; Institutional; and Transportation/Utility uses as enumerated in the approved special area plan for an area so designated.

Locational Characteristics - This category is generally appropriate to those community areas designed to serve as local retail, financial, governmental, residential, and employment focal points for a community; and to specified target neighborhoods designed to encourage redevelopment in one or a combination of uses as identified above and set forth in the special area plan therefor.

Traffic Generation Characteristics - The standard for the purpose of calculating typical traffic impacts relative to a Countywide Plan Map amendment for this category shall be based upon the actual mix and intensity of land use proposed in the special area plan, calculated by using the appropriate traffic generation characteristics for each corresponding category of land use, adjusted to account for proposed density/intensity of said land use.

Density/Intensity Standards - Shall be as set forth for each classification of use and location in the approved special area plan. Densities/intensities shall be consistent with the redevelopment strategy for this category and shall generally parallel the medium to high density/intensity standards of the conventional categories for the respective types of use characteristics provided for thereunder.

Other Standards - Shall include the following:

- Special Area Plan Required - The utilization of this category shall require a special area plan as set forth in Section 4.2.7.5.

2.3.3.9 SPECIAL DESIGNATIONS - CONT.

2.3.3.9.5 Category/Symbol - Central Business District (CBD).

Purpose - It is the purpose of this category to depict those areas of the county that are now designated, or appropriate to be designated, as urban centers for redevelopment in accord with a special area plan therefor.

Use Characteristics - Those uses appropriate to and consistent with this category shall include:

- Primary Uses - Residential; Office; Commercial; Industrial; Institutional; and Transportation/Utility uses as enumerated in the approved special area plan for an area so designated.

Locational Characteristics - This category is generally appropriate to those central business districts designed to serve as the primary retail, financial, governmental, residential, and employment focal points for a community; and to reflect those urban centers in the county served by adequate vehicular and mass transit service so as to accommodate their more intensive urban character.

Traffic Generation Characteristics - The standard for the purpose of calculating typical traffic impacts relative to a Countywide Plan Map amendment for this category shall be based upon the actual mix and intensity of land use proposed in the special area plan, calculated by using the appropriate traffic generation characteristics for each corresponding category of land use, adjusted to account for proposed density/intensity of said land use.

Density/Intensity Standards - Shall be as set forth for each classification of use and location in the approved special area plan. Densities/intensities shall be consistent with the redevelopment strategy for this category and shall generally be at or above the highest density/intensity standards of the conventional categories for the respective types of use characteristics provided for thereunder.

Other Standards - Shall include the following:

- Special Area Plan Required - The utilization of this category shall require a special area plan as set forth in Section 4.2.7.5.

Table 1
SUMMARY CATEGORY MATRIX

| <u>CLASSIFICATION</u> | <u>CATEGORY/SYMBOL</u> | <u>D.U./ACRE MAX.</u> | <u>F.A.R. MAX./STD.</u> | <u>I.S.R. MAX./STD.</u> | <u>TRAFFIC GENERATION RATE (ADT/AC.)</u> |
|------------------------|--|---------------------------|---|-----------------------------|--|
| RESIDENTIAL: | Residential Rural (RR) | .5 | .30/.18 | .60/.45 | 10 |
| | Residential Estate (RE) | 1.0 | .30/.18 | .60/.45 | 14 |
| | Residential Suburban (RS) | 2.5 | .30/.18 | .60/.45 | 28 |
| | Residential Low (RL) | 5.0 | .40/.24 | .65/.50 | 51 |
| | Residential Urban (RU) | 7.5 | .40/.24 | .65/.50 | 70 |
| | Residential Low Medium (RLM) | 10.0 | .50/.30 | .75/.56 | 63 |
| | Residential Medium (RM) | 15.0 | .50/.30 | .75/.56 | 96 |
| | Residential High (RH) | 30.0 | .60/.36 | .85/.65 | 183 |
| | Residential Very High (RVH) | | .60/.36 | .85/.65 | 301 |
| MIXED USE: | Residential/Office Limited (R/OL) | 7.5 | .40/.24 | .75/.56 | 119 |
| | Residential/Office General (R/OG) | 15.0 | .50/.30 | .75/.56 | 170 |
| | Residential/Office/Retail (R/O/R) | 18.0 | .40/.24 | .85/.65 | 336 |
| | Resort Facilities Overlay (RFO) | | Per Underlying Category | | |
| | Resort Facilities Medium (RFM) | 18.0 | .65/.39 | .85/.65 | 167 |
| | Resort Facilities High (RFH) | 30.0 | 1.2/.72 | .95/.72 | 310 |
| COMMERCIAL: | Commercial Neighborhood (CN) | 10.0 | .40/.24 | .80/.60 | 350 |
| | Commercial Limited (CL) | 18.0 | .45/.27 | .85/.65 | 364 |
| | Commercial Recreation (CR) | 24.0 | .55/.33 | .90/.68 | 546 |
| | Commercial General (CG) | 24.0 | .55/.33 | .90/.68 | 465 |
| INDUSTRIAL: | Industrial Limited (IL) | | .65/.39 | .85/.65 | 170 |
| | Industrial General (IG) | | .75/.45 | .95/.72 | 199 |
| PUBLIC/SEMI-PUBLIC: | Preservation (P) | | .10/.05 | .20/.10 | 0.3 |
| | Recreation/Open Space (R/OS) | | .25/.15 | .60/.45 | 4 |
| | Institutional (I) | 12.5 | .65/.39* | .85/.65 | 167 |
| | Transportation/Utility (T/U) | | .70/.42 | .90/.68 | 18 |
| PLANNED REDEVELOPMENT: | Residential (R) | | Per Approved Special Area Plan | | |
| | Mixed Use (MU) | | Per Approved Special Area Plan | | |
| | Commercial (C) | | Per Approved Special Area Plan | | |
| | Industrial (IND) | | Per Approved Special Area Plan | | |
| SPECIAL DESIGNATIONS: | Water/Drainage Feature | | Not Applicable | | |
| | Scenic/Non-Commercial Corridor | | See Otherwise Applicable Category | | |
| | Activity Center (AC) | | See Otherwise Applicable Category and Multiplier Factor | | |
| | Community Redevelopment District (CRD) | | Per Approved Special Area Plan | | |
| | Central Business District (CBD) | | Per Approved Special Area Plan | | |

SECTION 2. The portions of Article 4. Plan Criteria and Standards, are hereby amended as set forth below. All other portions of Article 4 are preserved and remain as previously set forth in the Countywide Rules:

SEC. 4.2.2 MAJOR CLASSIFICATIONS AND CATEGORIES/CONTINUUM.

4.2.2.1 Major Classifications. The Countywide Rules hereby establish and identify major land use classifications, under which the specific categories are enumerated. Each local future land use category shall be placed within one of the following six (6) major countywide classifications:

- Residential
- Mixed Use
- Commercial
- Industrial
- Public/Semi-Public
- Planned Redevelopment
- Special Designations

The purpose of the major classifications is to preclude comparison, with respect to use characteristics and the relative density and intensity, between or among the major classifications. This requirement specifies that no direct hierarchy or pyramid of use characteristics or density and intensity standards exists between the six major classifications; rather a hierarchy exists only among categories within a particular classification.

Appropriate land uses within a category under one major classification are not considered consistent with those under another major classification, unless such land uses are specifically referenced in a category under that separate major classification.

Special Designations may be placed over or in place of any category, as per their description, and may contain standards which supplement and/or supersede those of the underlying category.

4.2.2.2 Categories. Within each of the six major classifications, specific categories are hereby established and named below. The nomenclature and relative density and intensity continuum for local government future land use plans shall be as follows:

| <u>Major Classification</u> | <u>Category Name and Symbol</u> | <u>Relative Density/ Intensity Continuum</u> |
|-----------------------------|---------------------------------|--|
| Residential | Residential Rural (RR) | Least Density |
| | Residential Estate(RE) | |
| | Residential Suburban (RS) | |
| | Residential Low (RL) | |
| | Residential Urban (RU) | to |
| | Residential Low Medium (RLM) | |
| | Residential Medium (RM) | |
| | Residential High (RH) | |
| | Residential Very High (RVH) | Most Density |

| | | |
|----------------------------|---|--|
| Mixed Use | Residential/Office Limited (R/OL) Residential/Office General (R/OG) Residential/Office/Retail (R/O/R) Resort Facilities Overlay (RFO)* Resort Facilities Medium (RFM) Resort Facilities High (RFH) | Least Density/ Intensity to Most Density/ Intensity |
| Commercial (CR) | Commercial Neighborhood (CN) Commercial Limited (CL) to Commercial General (CG) | Least Density/Intensity Commercial Recreation Most Density/Intensity |
| Industrial | Industrial Limited (IL) Industrial General (IG) | Least Intensity to Most Intensity |
| Public/ Semi-Public | Preservation (P) Recreation/Open Space (R/OS) Institutional (I) Transportation/Utility (T/U) | Least Intensity to Most Intensity |
| Planned Redevelopment** | Residential Mixed Use Commercial Industrial | As Noted in Countywide Rules |
| Special Designations** | Water/Drainage Feature Scenic/Non-Commercial Corridor Activity Center (AC) Community Redevelopment District (CRD) Central Business District (CBD) | As Noted in Countywide Rules |

* Based upon the underlying density/intensity

** Due to the unique nature of the Planned Redevelopment and Special Designations there is no continuum comparison between or among these categories.

4.2.7.1.4

The following criteria shall be considered by the Pinellas Planning Council and Countywide Planning Authority, in concert with other consistency and amendment criteria, in the review of an application by local government for amendment of the Countywide Plan Map on a Scenic/ Non-Commercial Corridor:

- A. Countywide Plan Map Consistency - The extent to which the local government request is consistent with the following Table 2 "**Countywide Plan Map/Corridor Classification Consistency.**" Nothing in these consistency guidelines shall preclude a local government from being more restrictive, i.e., to determine that a particular category shall not be considered consistent with a particular corridor subclassification, irrespective of provision for same in Table 2.
- B. Considerations by Countywide Plan Map Classification
 - 1. Residential Countywide Plan Map Classification - With respect to a Residential Countywide Plan Map classification, the extent to which the local government request discourages the intensification of residential use on a Scenic/Non-Commercial Corridor. In particular, an amendment to the Countywide Plan Map to increase residential density shall be discouraged, except where such amendment is determined to be consistent with the existing delineation of Countywide Plan Map categories, adjoining existing use, and the purpose and intent of the Scenic/Non-Commercial Corridor Plan Element as applied through these Countywide Rules and the otherwise applicable amendment process.
 - 2. Mixed Use, Commercial, or Industrial Countywide Plan Map Classifications - With regard to Mixed Use, Commercial or Industrial Countywide Plan Map classifications:
 - a. The extent to which the local government request discourages non-residential uses on a Scenic/Non-Commercial Corridor. In particular, amendment to the Countywide Plan Map to allow a new or expanded Mixed Use, Commercial or Industrial category shall be discouraged, except where such amendment is:
 - i. the logical in-fill, extension or terminus of an existing non-residential classification; and
 - ii. the logical in-fill, extension or terminus of an adjoining existing non-residential use; and
 - iii. considered in relationship to the existing delineation of surrounding categories on the Countywide Plan Map and Corridor Subclassification(s); and
 - iv. consistent with the purpose and intent of the Scenic/Non-Commercial Corridor Plan Element as applied through these Countywide Rules and the otherwise applicable amendment process.
 - b. The extent to which the local government request minimizes

any increase in density/intensity on a Scenic/Non-Commercial Corridor. Specifically, in reviewing any application for non-residential use on a Scenic/Non-Commercial Corridor, the proposed density/intensity of use as measured by dwelling units per acre, floor area ratio and impervious surface ratio, as is applicable, shall be considered with the objective of not exceeding the density/intensity of either the adjoining non-residential uses or the mid-point of the range for the density/intensity standards of the applicable category, whichever is less.

3. Public/Semi-Public Countywide Plan Map Classifications - With respect to Public/Semi-Public Countywide Plan Map classifications, the extent to which the local government request provides for Public/Semi-Public categories consistent with the character, intensity and scale of the uses permitted within these respective categories in relation to the existing delineation of Countywide Plan Map categories, adjoining existing use, the need for and service area of the public/semi-public use, and the purpose and intent of the Scenic/Non-Commercial Corridor Plan Element as applied through these Countywide Rules and the otherwise applicable amendment process.
 4. Special Designations and Planned Redevelopment Classification - Those Countywide Plan Map categories that require a special area plan under Section 4.2.7.5 shall be evaluated as part of the special area plan review process to determine their consistency with the purpose and intent of Section 4.2.7.1.
- C. Scenic/Non-Commercial Corridor Plan Element - The extent to which the local government request has taken into account the Scenic/Non-Commercial Corridor Plan Element, including the Goals, Objectives, and Policies articulated within the plan element, as is relevant to the particular amendment under consideration. Consistent with its advisory nature, the Scenic/Non-Commercial Corridor Plan Element shall not serve as a basis for denial of an amendment.
- D. MPO Long Range Transportation Plan - The extent to which the local government request has taken into account the current MPO Long Range Transportation Plan, and any enhanced access management standards, as is relevant to the particular roadway under consideration. Particular consideration shall be given to the established policies of the governmental entity having construction and maintenance responsibility over the subject facility.
- E. Countywide Sign Regulations - The extent to which the local government request has taken into account the Countywide Sign Ordinance, Part III Chapter 162, as amended, of the Pinellas County Land Development Code including provisions which govern the placement of off-premise signs, as is relevant to the particular amendment under consideration.

5.5.3.1.5 **Designated Development/Redevelopment Areas.** If the amendment involves the creation, expansion, or contraction of a Residential Very High (RVH), Activity Center (AC), Community Redevelopment District (CRD), Central Business District (CBD) category, or the Planned Redevelopment categories, the manner in, and extent to, which the amendment conforms to the purpose and requirements of the applicable category and Section 4.2.7.5.

SECTION 4. The portions of Article 7, Terms and Definitions, are hereby amended as set forth below. All other portions of Article 5 are preserved and remain as previously set forth in the Countywide Rules:

Activity Center - A Countywide Plan Map category under the Special Designations major classification which includes those areas of the county that are now developed or appropriate to be developed for the purpose of encouraging concentrations of employment, housing, cultural, or business development consistent with the Countywide Plan and the special area plan approved therefor. This category will be identified on the Countywide Plan Map as an overlay superimposed over the otherwise applicable category as Activity Center.

Planned Redevelopment Classification - A major Future Land Use classification which includes the following categories designed to accommodate a community's plan(s) for neighborhood, corridor, district or center preservation, revitalization, rehabilitation and/or reconstruction:

- Residential
- Mixed Use
- Commercial
- Industrial

Special Designations Classification - A major Future Land Use classification which includes the following categories:

- Water/Drainage Feature
- Scenic/Non-Commercial Corridor
- Activity Center
- Community Redevelopment District
- Central Business District

SECTION 5. Severability. It is declared to be the intent of the Board of County Commissioners that if any section, subsection, sentence, clause, phrase, or provision of this ordinance is held invalid or unconstitutional, such invalidity or unconstitutionality shall not be construed as to render invalid or unconstitutional the remaining provisions of this ordinance.

SECTION 6. Filing of Ordinance; Effective Date. Pursuant to Section 125.66, Florida Statutes, a certified copy of this Ordinance shall be filed with the Department of State by the Clerk of the Board of County Commissioners within ten (10) days after enactment by the Board of County Commissioners. This Ordinance shall become effective upon filing with the Department of State.

RECEIVED
CLERK OF THE BOARD OF COUNTY COMMISSIONERS

APPROVED
BY THE BOARD OF COUNTY COMMISSIONERS

PPC RESOLUTION NO. 06 – 3

A RESOLUTION OF THE PINELLAS PLANNING COUNCIL RECOMMENDING POLICIES TO GUIDE THE REVIEW OF AMENDMENTS TO THE COUNTYWIDE FUTURE LAND USE PLAN REGARDING PROPERTIES CLASSIFIED AS INDUSTRIAL LIMITED AND INDUSTRIAL GENERAL; AND FURTHER PROVIDING THAT SUCH POLICIES SHALL NOT PRECLUDE A LOCAL GOVERNMENT FROM HAVING MORE RESTRICTIVE POLICIES.

WHEREAS, the Pinellas Planning Council (the PPC) was created pursuant to Chapter 88-464, Laws of Florida, as amended (the Act), and granted the power to develop and implement a Countywide Comprehensive Plan (the Countywide Plan); and

WHEREAS, the Council is authorized pursuant to Section 5(7)(b) of the Act to develop rules, standards, policies, and objectives that will implement the Countywide Future Land Use Plan; and

WHEREAS, the Rules Concerning the Administration of the Countywide Future Land Use Plan (the Rules) implement the Countywide Plan; and

WHEREAS, the Board of County Commissioners, sitting in their capacity as the Countywide Planning Authority (the CPA), pursuant to the Act, adopted the Countywide Plan and Rules; and

WHEREAS, the adopted Countywide Plan recognizes that residential and commercial development pressures threaten to decrease supplies of land needed for essential employment opportunities vital to the local economy; and

WHEREAS, *Pinellas By Design*, An Economic Development and Redevelopment Plan for the Pinellas Community, stresses the importance of retaining industrially-designated property to foster essential employment opportunities for primary high wage jobs; and

WHEREAS, it is desirable to retain industrially-designated land that provides for those employment opportunities and to limit the conversion of parcels designated Industrial Limited and Industrial General on the Countywide Plan Map to other designations; and

WHEREAS, it is desirable to have explicit policies based on the Countywide Plan and *Pinellas by Design* to aid the PPC and CPA in the review of proposed amendments

to the Countywide Plan Map involving the proposed conversion of land designated as Industrial Limited and/or Industrial General; and

WHEREAS, the CPA has requested the PPC to make a recommendation to the CPA on the adoption of criteria to be used as guidelines in the review of Countywide Plan Map amendments that propose to convert land designated Industrial Limited and/or Industrial General; and

WHEREAS, the Pinellas Planning Council has determined it necessary and appropriate to identify policies to be used in the review of proposed conversion amendments that would potentially reduce the amount of land designated Industrial Limited and/or Industrial General on the Countywide Plan Map; and

WHEREAS, the PPC has recommended the establishment of policies which will assist in the uniform administration of the Countywide Rules as they apply to amendments to the Countywide Plan Map that propose to convert land designated Industrial Limited and/or Industrial General.

NOW, THEREFORE, BE IT RESOLVED AS FOLLOWS:

SECTION 1. It shall be the policy of the Pinellas Planning Council to evaluate plan amendments to the Countywide Future Land Use Plan map that propose to convert land designated Industrial Limited and/or Industrial General to another Plan map category consistent with the position statements and strategies of the Countywide Plan and the Economic Development and Redevelopment Plan for Pinellas County.

SECTION 2. The review of all such plan amendments that would convert land now designated Industrial Limited and/or Industrial General to some other Plan map category will include consideration of the ability and importance of such land to provide for essential and targeted employment opportunities vital to the local economy.

SECTION 3. No recommendation for Plan map amendment from Industrial Limited and/or Industrial General shall be made absent an affirmative determination that there are changed or changing conditions that render the current industrial designation no longer viable relative to providing for essential and targeted employment opportunities; and further that there are compelling reasons to make such change in the public interest consistent with the Countywide Plan and Economic and Redevelopment Plan.

SECTION 4. Nothing in these advisory policies shall be construed or applied to preclude a local government with jurisdiction from having requirements concerning the conversion or retention of industrial land that are more restrictive than those set forth herein.

SECTION 5. A copy of this Resolution shall be forwarded to the Pinellas County Board of County Commissioners, in their capacity as the CPA, for their consideration and approval, and to each local government in Pinellas County.

This Resolution offered and adopted at the May 17, 2006, meeting of the Pinellas Planning Council as hereinafter set forth:


Councilmember Beverland offered the foregoing Resolution, which was seconded by Councilmember Steingold and the vote was: 9-1.

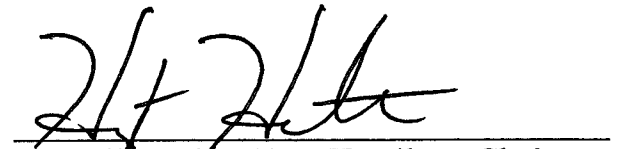
AYES: Sandra Bradbury, Jerry Beverland, Pat Gerard, Bob Hackworth, Hoyt Hamilton, Dick Holmes, Jerry Knight, Mary Maloof, Andy Steingold.

NAYS: John Morroni.

ABSENT AND NOT VOTING: Beverley Billiris, Bill Foster,
Linda Lerner.

ATTEST:


David P. Healey, Executive Director
Pinellas Planning Council


Councilmember Hoyt Hamilton, Chairman
Pinellas Planning Council

APPROVED AS TO FORM
OFFICE OF COUNTY ATTORNEY

Attorney

BCC 06/06/06

- #51 Sitting as the Countywide Planning Authority (CPA), the Board officially received and filed Pinellas Planning Council Resolution No. 06-3 regarding interim policy guidelines for Industrial Plan Categories.

Director of Planning Brian K. Smith provided historical background information; indicated that staff is of the opinion that it is not necessary to have a separate resolution under the CPA process; and in response to query by Chairman Welch, related that the county guidelines conform with the Pinellas Planning Council (PPC) guidelines.

PPC Executive Director David P. Healey pointed out that the PPC has adopted more generalized language in its resolution; suggested that the members adopt a similar resolution which would be preferable in reviewing proposed countywide plan amendments; and indicated that he does not believe that there is any conflict in what County staff has recommended; whereupon, he clarified that Commissioner Morroni had voted in opposition to PPC Resolution No. 06-3.

| | | |
|--------|---|----------------------|
| Motion | - | Commissioner Latvala |
| Second | - | Commissioner Duncan |
| Vote | - | 7 - 0 |

RESOLUTION NO. 06 - 55

A RESOLUTION OF THE BOARD OF COUNTY COMMISSIONERS APPROVING ADVISORY CRITERIA FOR THE REVIEW OF AMENDMENTS TO THE PINELLAS COUNTY FUTURE LAND USE MAP REGARDING PROPERTIES CLASSIFIED AS INDUSTRIAL LIMITED AND INDUSTRIAL GENERAL.

WHEREAS, the Pinellas County Board of County Commissioners ("the BCC") is granted the power to develop and implement a Comprehensive Plan for Pinellas County which includes a Future Land Use Map ("the FLUM"); and

WHEREAS, the BCC is authorized to develop rules and standards that will implement the FLUM; and

WHEREAS, the BCC recognizes that residential and commercial development pressures threaten to decrease supplies of land needed for employment centers and businesses vital to the local economy that are designated as Industrial Limited and/or Industrial General; and

WHEREAS, it is desirable to retain industrially designated land and to limit the conversion of parcels designated Industrial Limited and/or Industrial General on the County FLUM to other designations; and

WHEREAS, the Economic Development and Redevelopment Plan for the Pinellas Community ("Pinellas By Design"), and the Pinellas County "Planning to Stay" Comprehensive Plan element stress the importance of retaining the industrial base; and

WHEREAS, it is desirable to have criteria to aid the BCC in the review of proposed land use amendments to the County FLUM involving the potential reduction in the amount of land designated as Industrial Limited and/or Industrial General; and

WHEREAS, the BCC has determined it necessary to identify criteria to be used in the review of proposed amendments that would potentially convert land designated as Industrial Limited and/or Industrial General on the County FLUM.

NOW, THEREFORE, BE IT RESOLVED by the Board of County Commissioners, that:

1. The advisory criteria as set forth below are approved for use by the BCC as the basis for the review of land use amendments to the County FLUM Map that propose to convert land designated as Industrial Limited and/or Industrial General.

2. The County staff is hereby authorized to utilize these advisory criteria as part of said FLUM amendment staff review process.

SECTION 1. Industrially Designated Land - In an effort to limit the conversion of industrial land, the BCC should deny amendments to the County FLUM that would propose to remove the Industrial Limited and/or the Industrial General FLUM designation from property so classified. However, the BCC may consider approving such amendments based upon a balancing of the following criteria, as are determined applicable and significant to the subject amendment:

A. Access to Major Transportation Facilities: The extent to which the requested amendment deletes an industrially designated parcel or parcels that have direct access to, or that are in close proximity to, major transportation facilities such as rail, an airport, a seaport, a State or Federal highway, or a County designated arterial roadway;

B. Utilization of County Owned or Controlled Industrial Infrastructure. The extent to which public investments in County owned or controlled properties have been made which properties could be utilized to mitigate the impacts of an amendment that will result in a decrease in industrially designated land;

C. Coordination with Economic Development. The extent to which the amendment's impacts have been evaluated by the Pinellas County Economic Development Department;

D. Improvement of Public Access to Water. The extent to which the requested amendment will result in the improvement of public access, to the Gulf of Mexico, the Intracoastal Waterway, inland waterways (such as the Anclote River), and Tampa Bay;

E. Water Dependent Use. The extent to which the requested amendment is for uses which are water dependent, such as marinas and marine related facilities;

F. Integral Part of Comprehensive Planning Process. The extent to which the requested amendment has been initiated as an integral part of the comprehensive planning process consistent with the County's Comprehensive Plan, in order to enhance the manufacturing, high-tech, and related business employment base;

G. Part of Community Redevelopment Plan. The extent to which the requested amendment is included in a Community Redevelopment Plan as defined by Florida Statutes for a downtown or other designated redevelopment area, or the extent to which the amendment will further other adopted redevelopment strategies;

H. Overall Increase in Industrial Land. The extent to which the requested amendment would result in a decrease in industrially designated land on a single parcel, in concert with a corollary amendment, or amendments, which result in an equal, or overall increase, in the amount of industrially designated land, or which would result in an increase in County owned land to be used for targeted employment base purposes.

Commissioner Latvala offered the foregoing Resolution and moved its adoption, which was seconded by Commissioner Duncan, and upon roll call the vote was:

Ayes: Welch, Duncan, Stewart, Harris, Seel, Latvala and Morroni.

Nayes: None.

Absent and not voting: None.

Target Employment and Industrial Land Study for the Pinellas Community

Appendix F: Data Sources and Bibliography

A. Description of Data Sources Referenced in This Study

1. Standard Industrial Classification

The Standard Industrial Classification (SIC) is an older system for classifying industries by type, established by the federal government in 1938. It classifies industries according to four-digit codes, and was last updated in 1987. This source was used to identify a list of target industries in the original *Pinellas by Design* study. The SIC classification has since been replaced by the North American Industrial Classification System (discussed below). Therefore, it was not used in this study.

2. Bureau of Economic Analysis

The U.S. Bureau of Economic Analysis (BEA) tracks local income and employment, reported yearly in a series of tables. One of these tables, table CA25, tracks total employment by industry. Data from this source was used to project employment in the *Pinellas by Design* study.

This source differs from most other official measures of employment because it attempts to track all employment of any type in all industries. All other measures, such as the Quarterly Census of Employment and Wages (discussed below), generally only track “wage and salary” employment, meaning employment created by firms that provide work for multiple employees and have official payrolls. This method can miss people paid through commissions, self-employed persons, people who derive their income through profits of corporations or partnerships, and other people who do not earn their income from wages or salaries. The BEA refers to the latter group as “proprietorships.”

The BEA data for wage and salary employment is job-based, meaning that it counts the number of jobs that are located in an area, rather than the number of workers who reside in an area or the number of workers employed in an area. This potentially overstates the importance of certain types of employment and can lead to current and future land use analyses that require more land than will actually be needed.

3. North American Industrial Classification System

The North American Industrial Classification System (NAICS) was adopted in 1997 as a companion to the North American Free Trade Agreement. Its six-digit classification system replaced the SIC, and was last updated in 2002. It was used in

Target Employment and Industrial Land Study for the Pinellas Community

the current study to refine and update the list of target industries first identified in the *Pinellas by Design* study.

Many NAICS codes do not track the specific market an industry may be dedicated to serving. For example, NAICS Industry 325412, Pharmaceutical Preparation/Manufacturing, does not give any detail about what type of pharmaceuticals are being manufactured, which may include anything from lip balm to antibiotics to radioisotopes for nuclear medicine.

4. Quarterly Census of Employment and Wages

The Quarterly Census of Employment and Wages (QCEW) is produced and published by the Bureau of Labor Statistics of the U.S. Department of Labor. It is alternatively known by the name ES-202. The program includes a quarterly count of employment and wages, as reported by employers, at the county, metropolitan statistical area, state, and national level by industry, and covers approximately 98 percent of U.S. jobs. It was used in the current study to refine and update the employment data created for the *Pinellas by Design* study.

The QCEW uses NAICS codes to identify industry types, and separates industries into more than 2,397 classifications. It shares the limitations of NAICS data, in that it cannot always classify industries with sufficient detail to allow true clusters to be identified. However, with 51 separate industrial classes, it can be used to perform basic analysis such as the one in this study.

5. Dun & Bradstreet

Dun & Bradstreet is a private business data provider. Its *MarketPlace* product separates industries into more than 18,557 separate classifications, based on SIC codes, but expanded to eight digits. The primary purpose of the data is for marketing, but it is also useful for industry research. Since these codes are based on the older SIC system, matching its data with the QCEW can be challenging, but is useful for further refining the industry clusters and performing finer analysis.

6. Agency for Workforce Innovation

A division of the State of Florida, the Agency for Workforce Innovation (AWI) prepares employment projections based on North American Industry Classification System and the federal Quarterly Census of Employment and Wages, both of which are discussed below. The projections are based largely on a linear extrapolation of historical employment in relation to one or more variables, such as state and local population, personal income, or national and state employment.

Target Employment and Industrial Land Study for the Pinellas Community

AWI was the primary resource used to project employment growth for this study. Although the original projections only extended to 2014, in order to provide a timeframe consistent with *Pinellas by Design: An Economic Development and Redevelopment Plan for the Pinellas Community*, they were extrapolated to 2025 by PPC staff. The full projections are shown in Table F-1 below, and a summary is included in Chapter 2.

Target Employment and Industrial Land Study for the Pinellas Community

**Table F-1
Pinellas County Projected Jobs by Industry, 2006**

| Industry | | Employment | | | Change 2006-2025 | |
|----------|---|----------------|----------------|----------------|------------------|--------------|
| Code | Title | 2006 | 2014 | 2025 | Total | Percent |
| | Total for All Industries | 529,271 | 614,477 | 731,635 | 202,364 | 38.2% |
| 11 | Agriculture, Forestry, Fishing and Hunting | 205 | 183 | 153 | -52 | -25.5% |
| 111 | Crop Production | 60 | 73 | 91 | 31 | 51.5% |
| 112 | Animal Production | 16 | 15 | 14 | -2 | -14.8% |
| 114 | Fishing, Hunting and Trapping | 26 | 20 | 12 | -14 | -54.8% |
| 21 | Mining | 21 | 23 | 26 | 5 | 22.6% |
| 23 | Construction | 25,700 | 30,109 | 36,171 | 10,471 | 40.7% |
| 236 | Construction of Buildings | 4,887 | 5,965 | 7,447 | 2,560 | 52.4% |
| 237 | Heavy and Civil Engineering Construction | 2,349 | 2,466 | 2,627 | 278 | 11.8% |
| 238 | Specialty Trade Contractors | 18,464 | 21,678 | 26,097 | 7,633 | 41.3% |
| | Manufacturing | 38,166 | 37,869 | 37,461 | -705 | -1.8% |
| | <i>Durable Goods Manufacturing</i> | 28,563 | 27,417 | 25,841 | -2,722 | -9.5% |
| 321 | Wood Product Manufacturing | 992 | 1,062 | 1,158 | 166 | 16.8% |
| 327 | Nonmetallic Mineral Product Manufacturing | 673 | 757 | 872 | 199 | 29.6% |
| 331 | Primary Metal Manufacturing | 332 | 360 | 399 | 67 | 20.0% |
| 332 | Fabricated Metal Product Manufacturing | 2,975 | 2,870 | 2,726 | -249 | -8.4% |
| 333 | Machinery Manufacturing | 2,771 | 2,683 | 2,562 | -209 | -7.5% |
| 334 | Computer and Electronic Product Manufacturing | 9,875 | 8,880 | 7,512 | -2,363 | -23.9% |
| 335 | Electrical Equipment and Appliance Manufacturing | 1,508 | 1,152 | 663 | -845 | -56.1% |
| 336 | Transportation Equipment Manufacturing | 2,527 | 2,593 | 2,684 | 157 | 6.2% |
| 337 | Furniture and Related Product Manufacturing | 1,429 | 1,561 | 1,743 | 313 | 21.9% |
| 339 | Miscellaneous Manufacturing | 5,481 | 5,499 | 5,524 | 43 | 0.8% |
| | <i>Non-Durable Goods Manufacturing</i> | 9,603 | 10,452 | 11,619 | 2,016 | 21.0% |
| 311 | Food Manufacturing | 1,139 | 1,233 | 1,362 | 223 | 19.6% |
| 312 | Beverage and Tobacco Product Manufacturing | 41 | 44 | 48 | 7 | 17.4% |

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| Industry | | Employment | | | Change 2006-2025 | |
|----------|---|------------|--------|--------|------------------|---------|
| Code | Title | 2006 | 2014 | 2025 | Total | Percent |
| 313 | Textile Mills | 66 | 74 | 85 | 19 | 28.8% |
| 314 | Textile Product Mills | 254 | 271 | 294 | 40 | 15.9% |
| 315 | Apparel Manufacturing | 352 | 339 | 321 | -31 | -8.8% |
| 322 | Paper Manufacturing | 382 | 411 | 451 | 69 | 18.0% |
| 323 | Printing and Related Support Activities | 3,667 | 3,881 | 4,175 | 508 | 13.9% |
| 324 | Petroleum and Coal Products Manufacturing | 94 | 111 | 134 | 40 | 43.0% |
| 325 | Chemical Manufacturing | 1,707 | 2,056 | 2,536 | 829 | 48.6% |
| 326 | Plastics and Rubber Products Manufacturing | 1,616 | 1,728 | 1,882 | 266 | 16.5% |
| | | | | | | |
| | Trade, Transportation, and Utilities | 77,862 | 83,368 | 90,939 | 13,077 | 16.8% |
| 22 | <i>Utilities</i> | 1,624 | 1,130 | 451 | -1,173 | -72.2% |
| 42 | <i>Wholesale Trade</i> | 16,305 | 16,826 | 17,542 | 1,237 | 7.6% |
| 423 | Merchant Wholesalers, Durable Goods | 10,703 | 11,391 | 12,337 | 1,634 | 15.3% |
| 424 | Merchant Wholesalers, Nondurable Goods | 3,459 | 3,522 | 3,609 | 150 | 4.3% |
| 425 | Wholesale Electronic Markets and Agents and Brokers | 2,143 | 1,913 | 1,597 | -546 | -25.5% |
| 44 | <i>Retail Trade</i> | 54,968 | 60,060 | 67,062 | 12,094 | 22.0% |
| 441 | Motor Vehicle and Parts Dealers | 7,653 | 8,623 | 9,957 | 2,304 | 30.1% |
| 442 | Furniture and Home Furnishings Stores | 1,753 | 2,108 | 2,596 | 843 | 48.1% |
| 443 | Electronics and Appliance Stores | 1,986 | 2,352 | 2,855 | 869 | 43.8% |
| 444 | Building Material and Garden Supply Stores | 4,079 | 4,677 | 5,499 | 1,420 | 34.8% |
| 445 | Food and Beverage Stores | 11,171 | 10,962 | 10,675 | -496 | -4.4% |
| 446 | Health and Personal Care Stores | 4,478 | 5,075 | 5,896 | 1,418 | 31.7% |
| 447 | Gasoline Stations | 1,783 | 1,765 | 1,740 | -43 | -2.4% |
| 448 | Clothing and Clothing Accessories Stores | 4,296 | 4,654 | 5,146 | 850 | 19.8% |
| 451 | Sporting Goods, Hobby, Book, and Music Stores | 1,666 | 1,562 | 1,419 | -247 | -14.8% |
| 452 | General Merchandise Stores | 8,314 | 9,504 | 11,140 | 2,826 | 34.0% |
| 453 | Miscellaneous Store Retailers | 4,455 | 4,878 | 5,460 | 1,005 | 22.6% |
| 454 | Nonstore Retailers | 3,334 | 3,900 | 4,678 | 1,344 | 40.3% |
| 48 | <i>Transportation and Warehousing</i> | 4,965 | 5,352 | 5,884 | 919 | 18.5% |
| 481 | Air Transportation | 108 | 116 | 127 | 19 | 17.6% |
| 483 | Water Transportation | 23 | 26 | 30 | 7 | 31.0% |
| 484 | Truck Transportation | 1,120 | 1,171 | 1,241 | 121 | 10.8% |

Target Employment and Industrial Land Study for the Pinellas Community

| Industry | | Employment | | | Change 2006-2025 | |
|----------|---|------------|---------|---------|------------------|---------|
| Code | Title | 2006 | 2014 | 2025 | Total | Percent |
| 485 | Transit and Ground Passenger Transport | 455 | 404 | 334 | -121 | -26.6% |
| 487 | Scenic and Sightseeing Transportation | 197 | 219 | 249 | 52 | 26.5% |
| 488 | Support Activities for Transportation | 1,263 | 1,441 | 1,686 | 423 | 33.5% |
| 492 | Couriers and Messengers | 1,189 | 1,260 | 1,358 | 169 | 14.2% |
| 493 | Warehousing and Storage | 561 | 671 | 822 | 261 | 46.6% |
| | | | | | | |
| 51 | Information | 9,114 | 9,373 | 9,729 | 615 | 6.7% |
| 511 | Publishing Industries | 2,540 | 2,041 | 1,355 | -1,185 | -46.7% |
| 515 | Broadcasting (except Internet) | 690 | 823 | 1,006 | 316 | 45.8% |
| 516 | Internet Publishing and Broadcasting | 124 | 89 | 41 | -83 | -67.0% |
| 517 | Telecommunications | 3,756 | 3,884 | 4,060 | 304 | 8.1% |
| 518 | ISPs, Web Search Portals, and Data Processing Services | 1,314 | 1,529 | 1,825 | 511 | 38.9% |
| 519 | Other Information Services | 126 | 176 | 245 | 119 | 94.2% |
| | | | | | | |
| | Financial Activities | 33,410 | 39,209 | 47,183 | 13,773 | 41.2% |
| 52 | <i>Finance and Insurance</i> | 24,345 | 29,530 | 36,659 | 12,314 | 50.6% |
| 522 | Credit Intermediation and Related Activities | 11,005 | 13,948 | 17,995 | 6,990 | 63.5% |
| 523 | Securities, Commodity Contracts, and Other Investments | 3,328 | 3,667 | 4,133 | 805 | 24.2% |
| 524 | Insurance Carriers and Related Activities | 9,446 | 11,234 | 13,693 | 4,246 | 45.0% |
| 525 | Funds, Trusts, and Other Financial Vehicles | 566 | 681 | 839 | 273 | 48.3% |
| 53 | <i>Real Estate and Rental and Leasing</i> | 9,065 | 9,679 | 10,523 | 1,458 | 16.1% |
| 531 | Real Estate | 6,797 | 7,156 | 7,650 | 853 | 12.5% |
| 532 | Rental and Leasing Services | 2,187 | 2,444 | 2,797 | 610 | 27.9% |
| 533 | Lessors of Nonfinancial Intangible Assets | 81 | 79 | 76 | -5 | -5.9% |
| | | | | | | |
| | Professional and Business Services | 122,279 | 158,762 | 208,926 | 86,647 | 70.9% |
| 0 | <i>Professional, Scientific, and Technical Services</i> | 28,881 | 32,693 | 37,935 | 9,054 | 31.3% |
| 55 | <i>Management of Companies and Enterprises</i> | 9,445 | 12,374 | 16,401 | 6,956 | 73.7% |
| 56 | <i>Administrative and Support and Waste Management</i> | 83,953 | 113,695 | 154,590 | 70,637 | 84.1% |
| 561 | Administrative and Support Services | 83,387 | 113,037 | 153,806 | 70,419 | 84.4% |
| 562 | Waste Management and Remediation Service | 566 | 658 | 785 | 219 | 38.6% |

Target Employment and Industrial Land Study for the Pinellas Community

| Industry | | Employment | | | Change 2006-2025 | |
|----------|---|------------|--------|---------|------------------|---------|
| Code | Title | 2006 | 2014 | 2025 | Total | Percent |
| | Education and Health Services | 68,057 | 82,943 | 103,411 | 35,354 | 51.9% |
| 61 | <i>Educational Services</i> | 6,210 | 7,382 | 8,994 | 2,784 | 44.8% |
| 62 | <i>Health Care and Social Assistance</i> | 61,847 | 75,561 | 94,418 | 32,571 | 52.7% |
| 621 | Ambulatory Health Care Services | 25,541 | 32,568 | 42,230 | 16,689 | 65.3% |
| 622 | Hospitals | 15,458 | 17,938 | 21,348 | 5,890 | 38.1% |
| 623 | Nursing and Residential Care Facilities | 14,655 | 17,479 | 21,362 | 6,707 | 45.8% |
| 624 | Social Assistance | 6,193 | 7,576 | 9,478 | 3,285 | 53.0% |
| | | | | | | |
| | Leisure and Hospitality | 45,253 | 51,274 | 59,553 | 14,300 | 31.6% |
| 71 | <i>Arts, Entertainment, and Recreation</i> | 6,978 | 8,822 | 11,358 | 4,380 | 62.8% |
| 711 | Performing Arts, Spectator Sports, and Related Industries | 2,057 | 2,353 | 2,760 | 703 | 34.2% |
| 712 | Museums, Historical Sites, and Similar Institutions | 347 | 411 | 499 | 152 | 43.8% |
| 713 | Amusement, Gambling, and Recreation Industries | 4,574 | 6,058 | 8,099 | 3,525 | 77.1% |
| 72 | <i>Accommodation and Food Services</i> | 38,275 | 42,452 | 48,195 | 9,920 | 25.9% |
| 721 | Accommodation | 8,849 | 9,987 | 11,552 | 2,703 | 30.5% |
| 722 | Food Services and Drinking Places | 29,426 | 32,465 | 36,644 | 7,218 | 24.5% |
| | | | | | | |
| 81 | Other Services (Except Government) | 20,210 | 22,807 | 26,378 | 6,168 | 30.5% |
| 811 | Repair and Maintenance | 4,510 | 5,067 | 5,833 | 1,323 | 29.3% |
| 812 | Personal and Laundry Services | 4,401 | 4,878 | 5,534 | 1,133 | 25.7% |
| 813 | Membership Associations and Organizations | 11,299 | 12,862 | 15,011 | 3,712 | 32.9% |
| | | | | | | |
| | Government | 47,582 | 53,284 | 61,124 | 13,542 | 28.5% |
| | Federal Government | 6,439 | 6,994 | 7,757 | 1,318 | 20.5% |
| | State Government | 4,374 | 4,715 | 5,184 | 810 | 18.5% |
| | Local Government | 36,769 | 41,575 | 48,183 | 11,414 | 31.0% |
| | | | | | | |
| | Self-Employed and Unpaid Family Workers | 41,412 | 45,273 | 50,582 | 9,170 | 22.1% |

Source: Florida Agency for Workforce Innovation (AWI), 2006; Pinellas Planning Council, 2007

Note: Employment Categories with three-digit codes are subsets of those with two-digit codes. Therefore, the sum of each column will be greater than the corresponding Total for All Industries shown at the top of the table.

Target Employment and Industrial Land Study for the Pinellas Community

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Target Employment and Industrial Land Study for the Pinellas Community

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Target Employment and Industrial Land Study for the Pinellas Community

Appendix G: Maps

This appendix contains relevant study maps including:

- Countywide Target Industry Land Use Locations Map
- Major Transportation Facilities Map
- Pinellas County Industrial Land Areas Map
- Central Pinellas Industrial Land Areas Map
- Largo Industrial Land Area Map
- Pinellas Park Industrial Land Area Map
- East Gateway Industrial Land Area Map
- St. Petersburg Industrial Land Areas – Subareas 1, 2, and 3 Maps
- Oldsmar Industrial Land Area Map
- Tarpon Springs Industrial Land Areas Map
- Clearwater Industrial Land Area Map
- Aviation/Aerospace Cluster Land Use Map
- Financial Services Cluster Land Use Map
- High Tech Cluster Land Use Map
- Information Technology Cluster Land Use Map
- Marine Science Cluster Land Use Map
- Medical Technology Cluster Land Use Map
- Microelectronics Cluster Land Use Map
- Modeling/Simulation Cluster Land Use Map
- Optics/Photonics Cluster Land Use Map
- Research/Development Cluster Land Use Map
- Wireless Technology Cluster Land Use Map

LEGEND

FLU Designation

- Industrial Limited - 477 Total Businesses
- Industrial General - 46 Total Businesses
- Not Industrial - 1,256 Total Businesses

FLU Designation

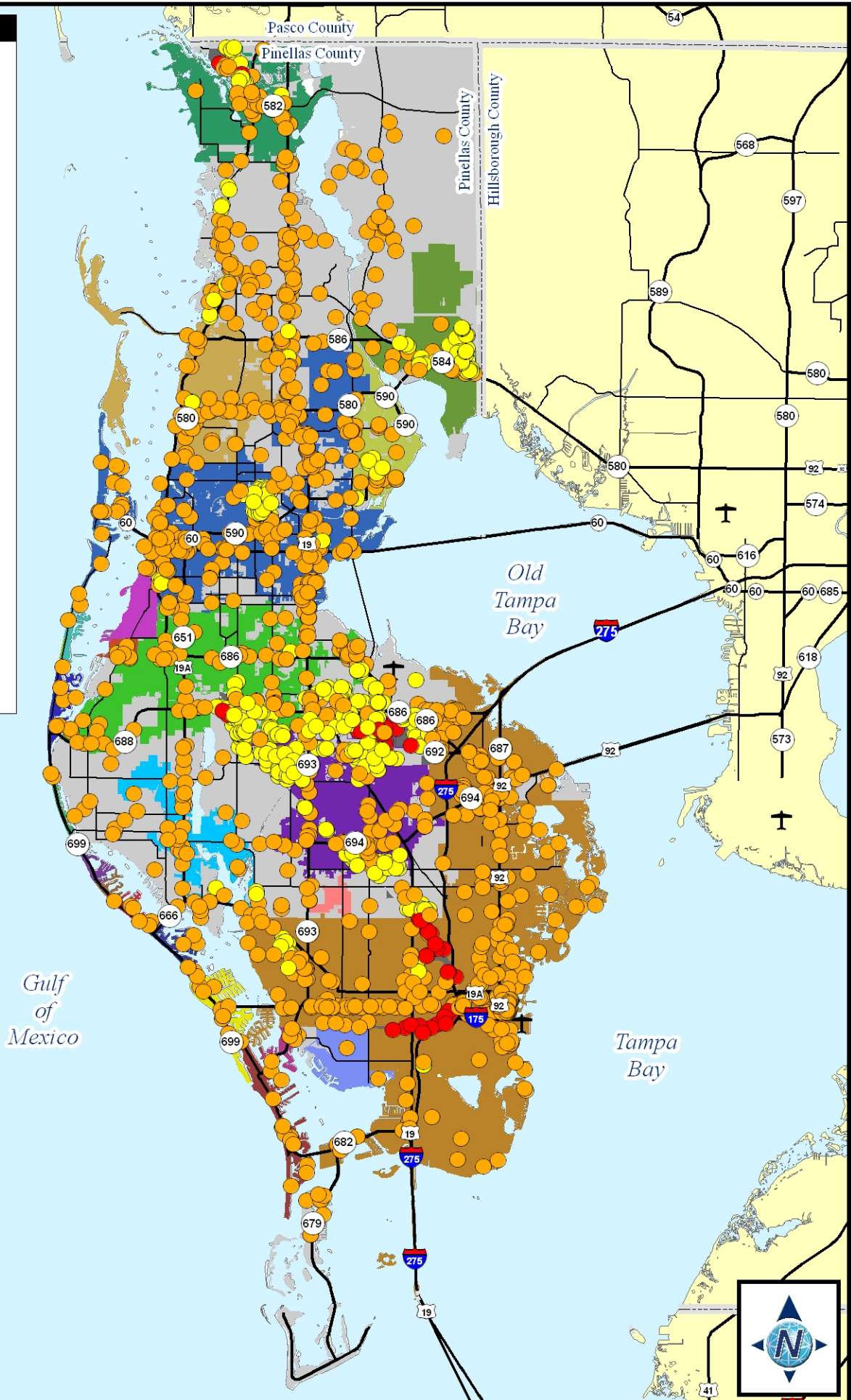
- Industrial Limited
- Industrial General
- County Boundary

- US Highways
- State Roads
- County Roads

- ✈ Airports

Municipalities

- BELLEAIR
- BELLEAIR BEACH
- BELLEAIR BLUFFS
- BELLEAIR SHORE
- CLEARWATER
- DUNEDIN
- GULFPORT
- INDIAN ROCKS BEACH
- INDIAN SHORES
- KENNETH CITY
- LARGO
- MADEIRA BEACH
- N REDINGTON BEACH
- OLDSMAR
- PINELLAS PARK
- REDINGTON BEACH
- REDINGTON SHORES
- SAFETY HARBOR
- SEMINOLE
- SOUTH PASADENA
- ST PETE BEACH
- ST PETERSBURG
- TARPON SPRINGS
- TREASURE ISLAND
- UNINCORPORATED



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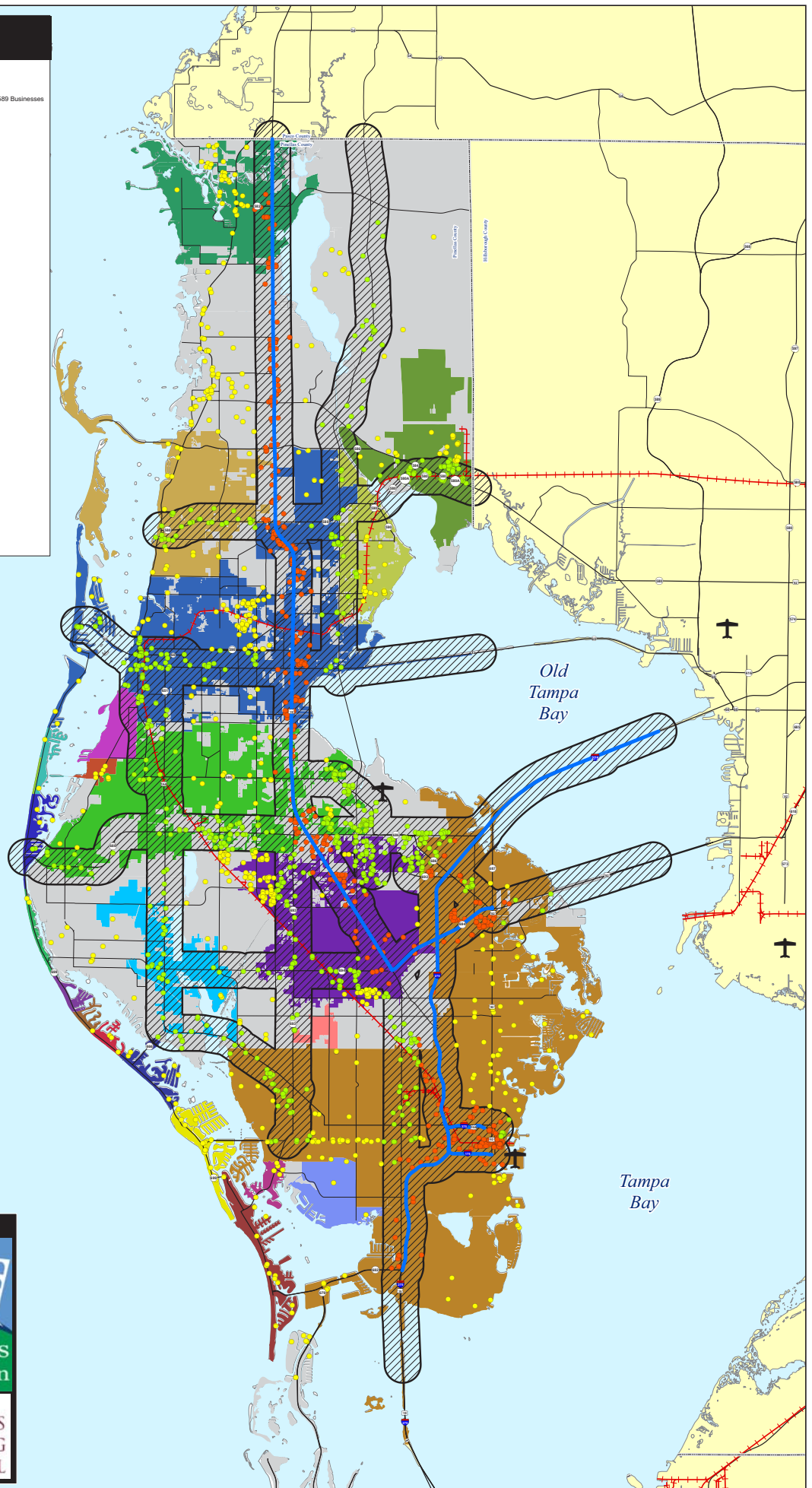
Countywide Target Industry
Land Use Locations

WilsonMiller
New Directions In Planning, Design & Engineering

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LEGEND

- Within 5 Miles of a Principle Arterial - Total: 731 Businesses
- Within 5 Miles of a SIS Road Class - Total: 459 Businesses
- Not Within 5 Miles of a Principle Arterial or SIS Road Class - Total: 589 Businesses
- 0.5 Mile Buffer from Principle Arterials and SIS Road Classes
- SIS Road Class
- County Boundary
- Railroads In Use
- US Highways
- State Roads
- County Roads
- ✈ Airports
- Municipalities
- BELLEAIR
- BELLEAIR BEACH
- BELLEAIR BLUFFS
- BELLEAIR SHORE
- CLEARWATER
- DUNEDIN
- GULFPORT
- INDIAN ROCKS BEACH
- INDIAN SHORES
- KENNETH CITY
- LARGO
- MADEIRA BEACH
- N REDINGTON BEACH
- OLDSMAR
- PINELLAS PARK
- REDINGTON BEACH
- REDINGTON SHORES
- SAFETY HARBOR
- SEMINOLE
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- ST PETE BEACH
- ST PETERSBURG
- TARPON SPRINGS
- TREASURE ISLAND
- UNINCORPORATED



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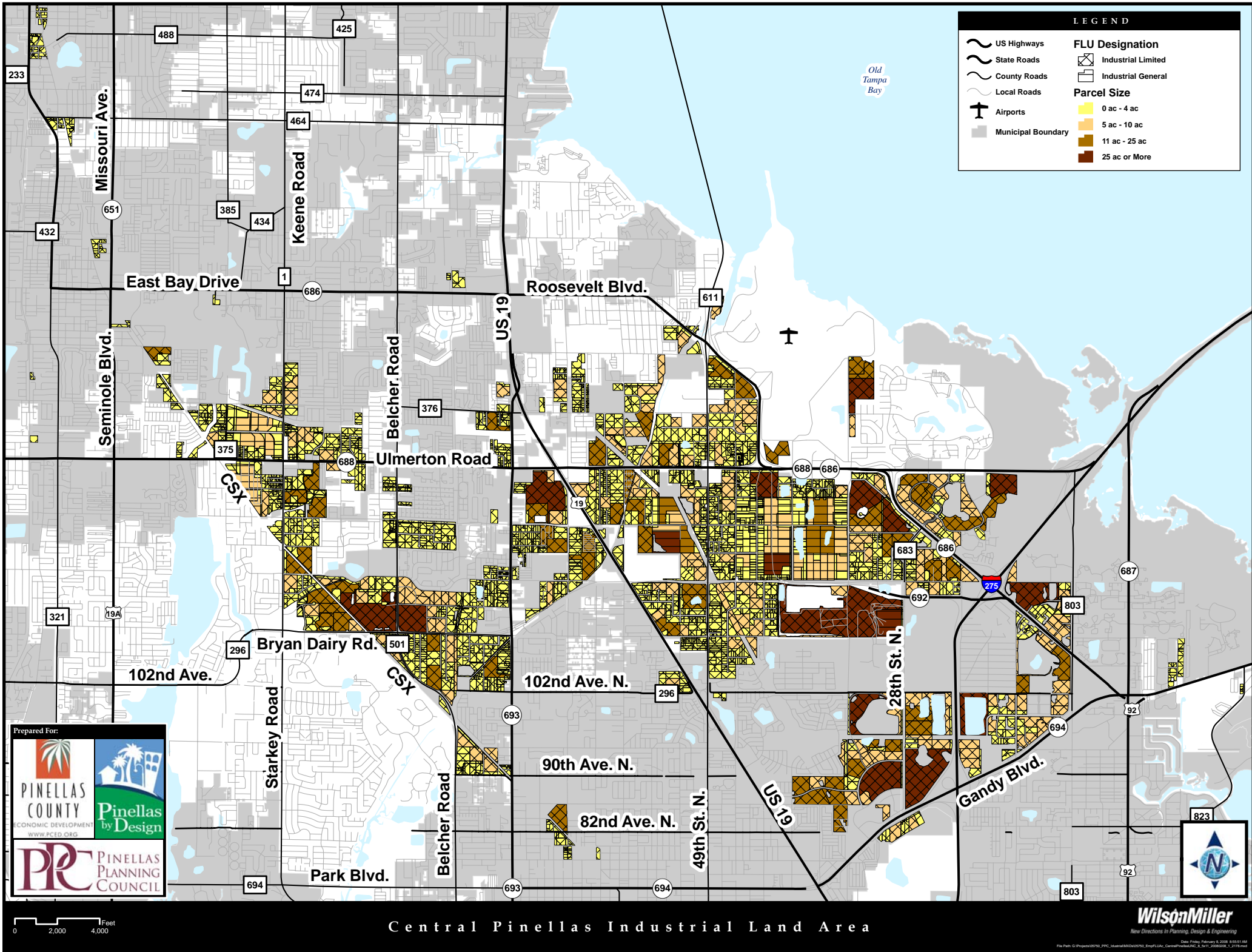


0 2 Miles

Major Transportation Facilities

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New Directions In Planning, Design & Engineering

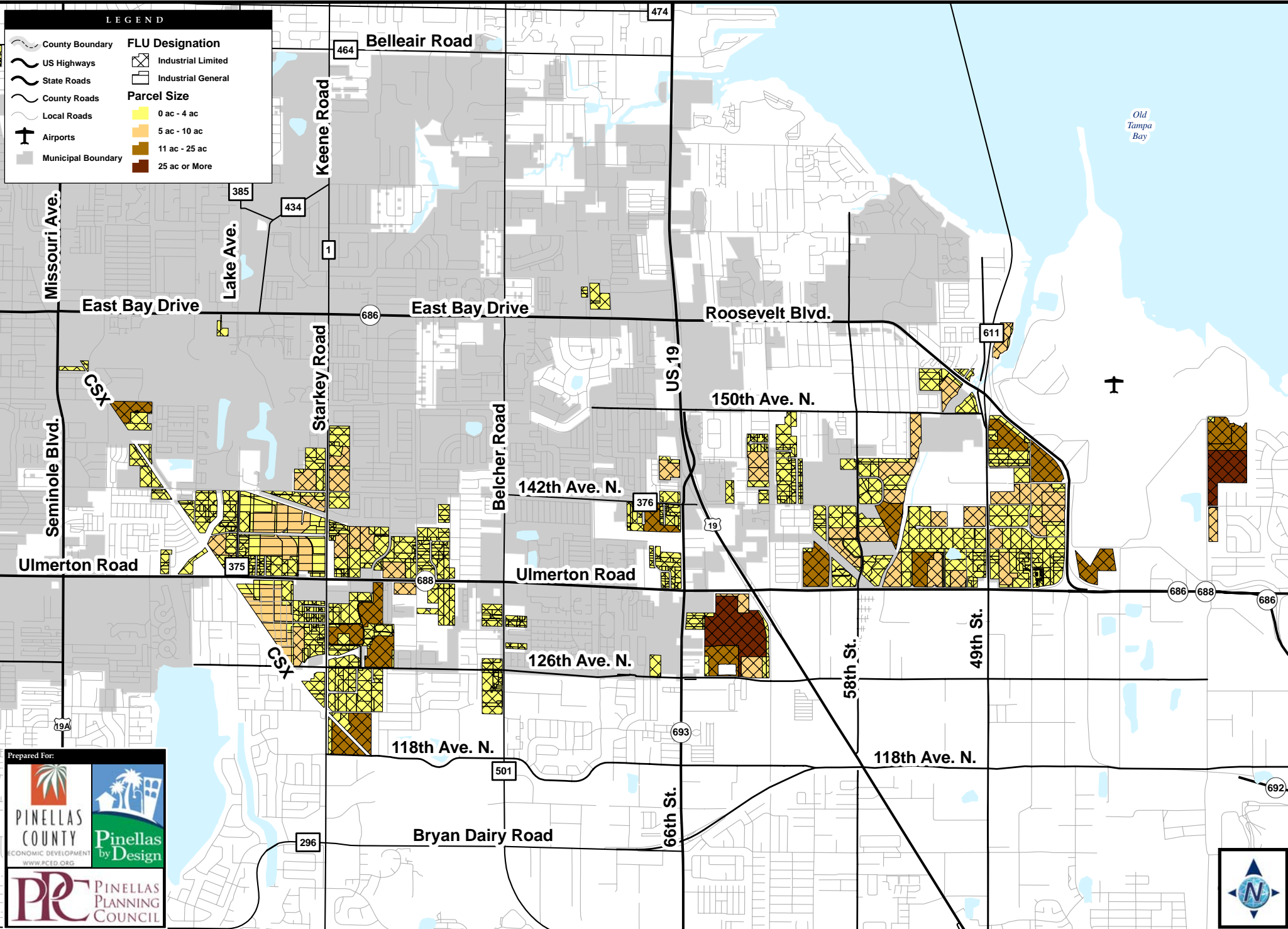
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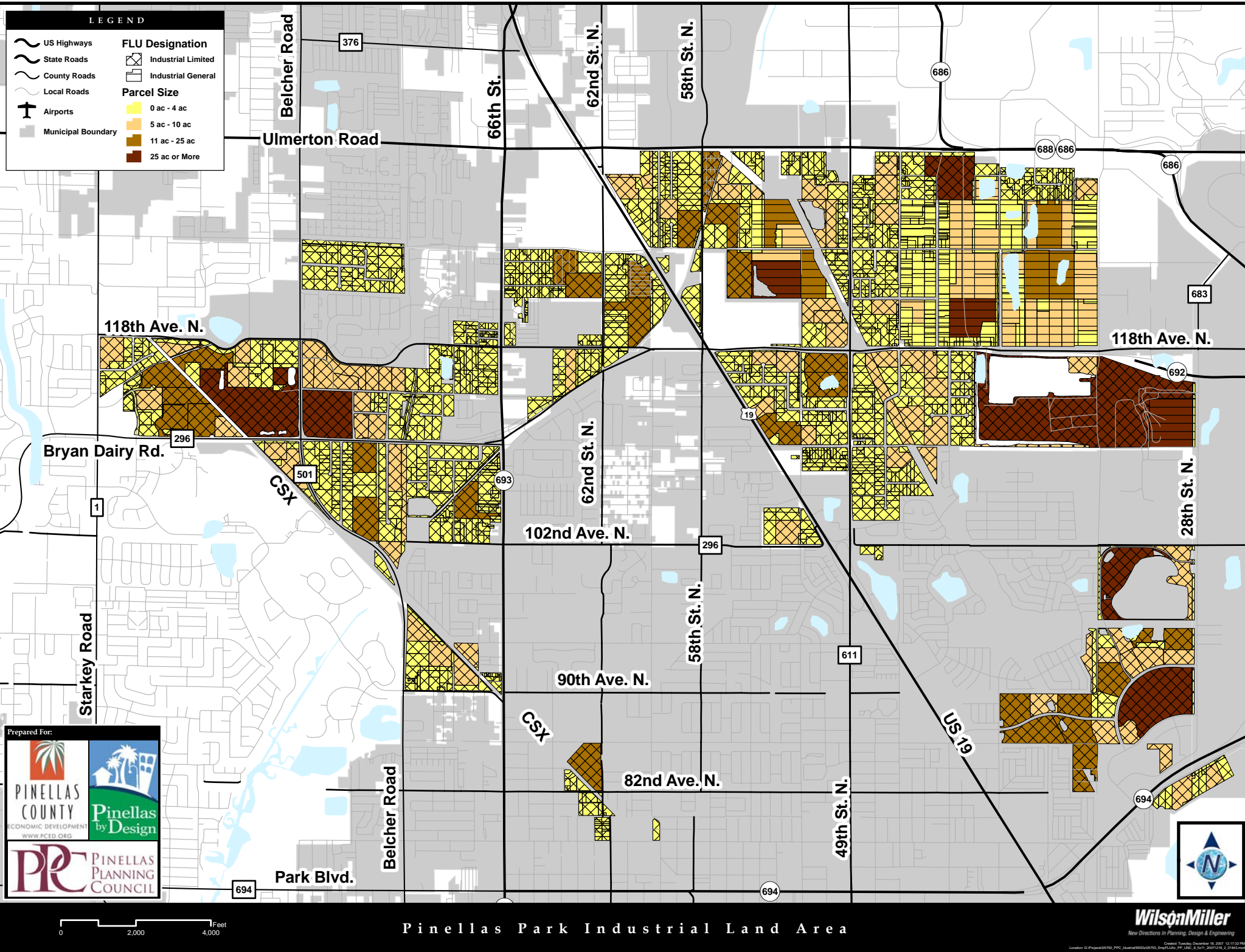
PINELLAS COUNTY
ECONOMIC DEVELOPMENT
WWW.PCED.ORG

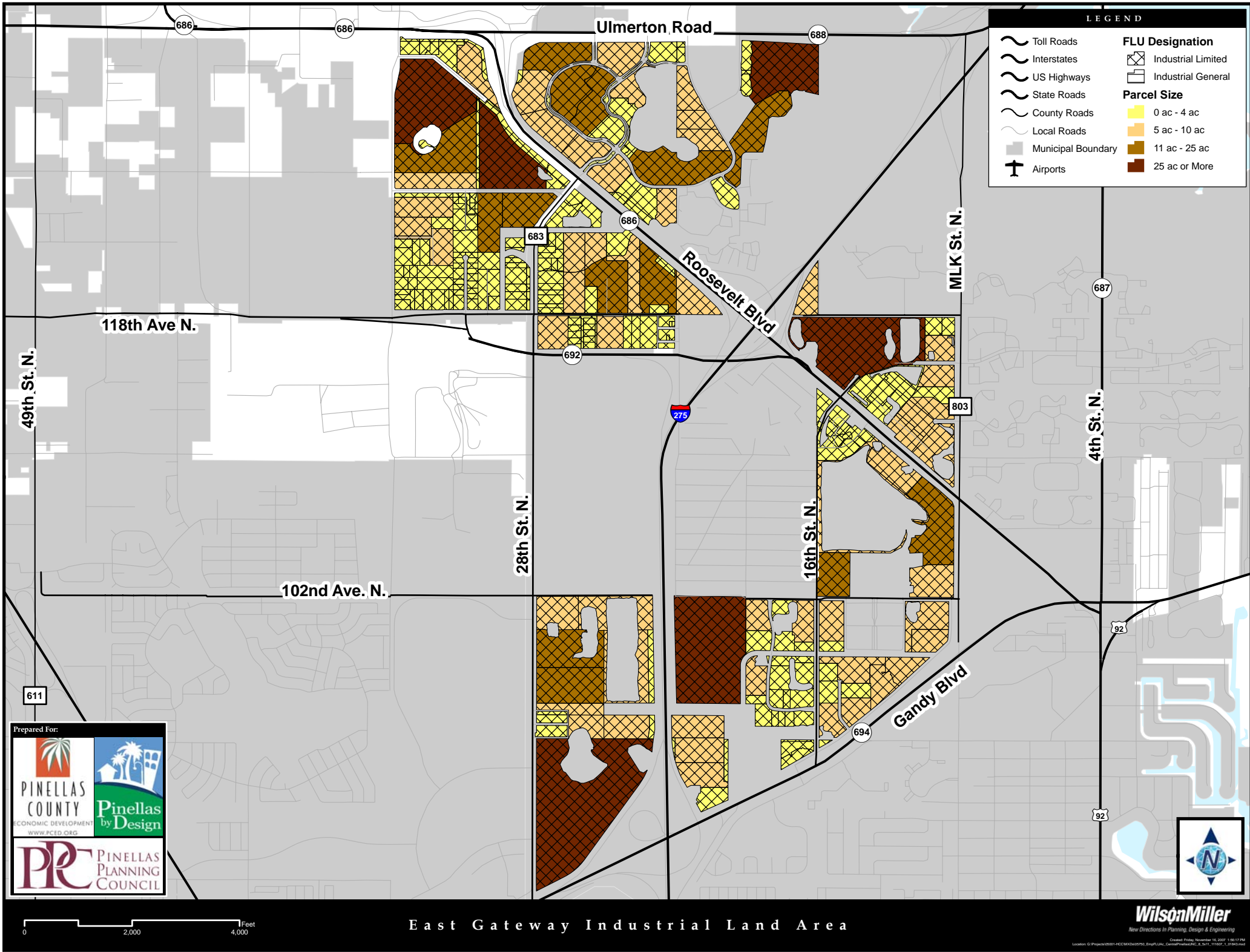
PINELLAS PLANNING COUNCIL



Largo Industrial Land Area

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New Directions in Planning, Design & Engineering





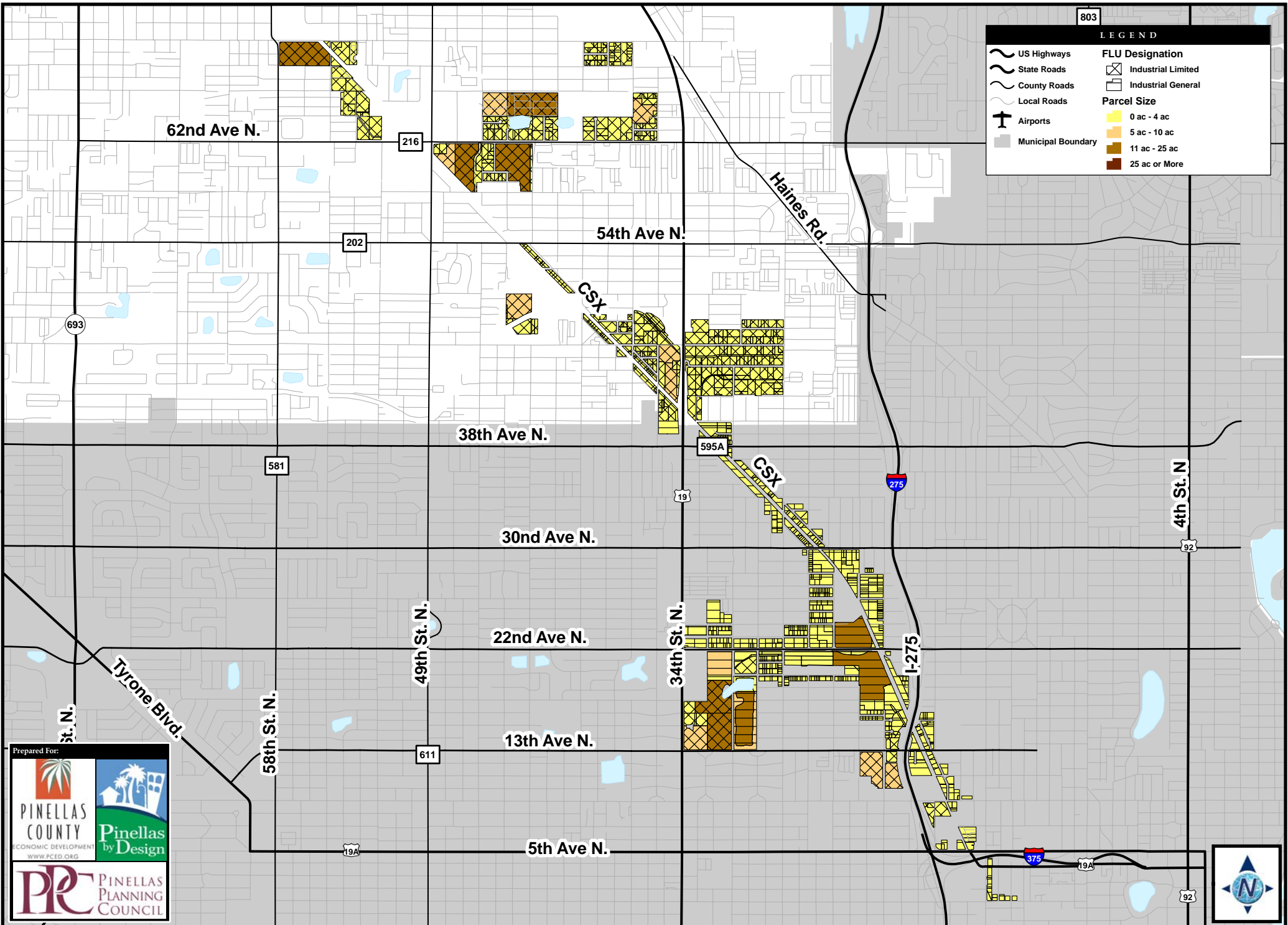
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East Gateway Industrial Land Area

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LEGEND

| | |
|---|---|
| US Highways State Roads County Roads Local Roads Airports Municipal Boundary | FLU Designation Industrial Limited Industrial General Parcel Size 0 ac - 4 ac 5 ac - 10 ac 11 ac - 25 ac 25 ac or More |
|---|---|



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PINELLAS COUNTY
ECONOMIC DEVELOPMENT
WWW.PCED.ORG

Pinellas
by Design

PINELLAS PLANNING COUNCIL

St. Petersburg Industrial Land Areas - Subarea 1

5th Ave N.

19A

LEGEND

- | | |
|--------------------|------------------------------------|
| US Highways | FLU Designation Industrial Limited |
| State Roads | Industrial General |
| County Roads | Parcel Size |
| Local Roads | 0 ac - 4 ac |
| Airports | 5 ac - 10 ac |
| Municipal Boundary | 11 ac - 25 ac |
| | 25 ac or More |

Central Ave.

611

49th St. N.

34th St. N.

19

175

7th Ave. S.

275

22nd Ave. S.

138

Prepared For:



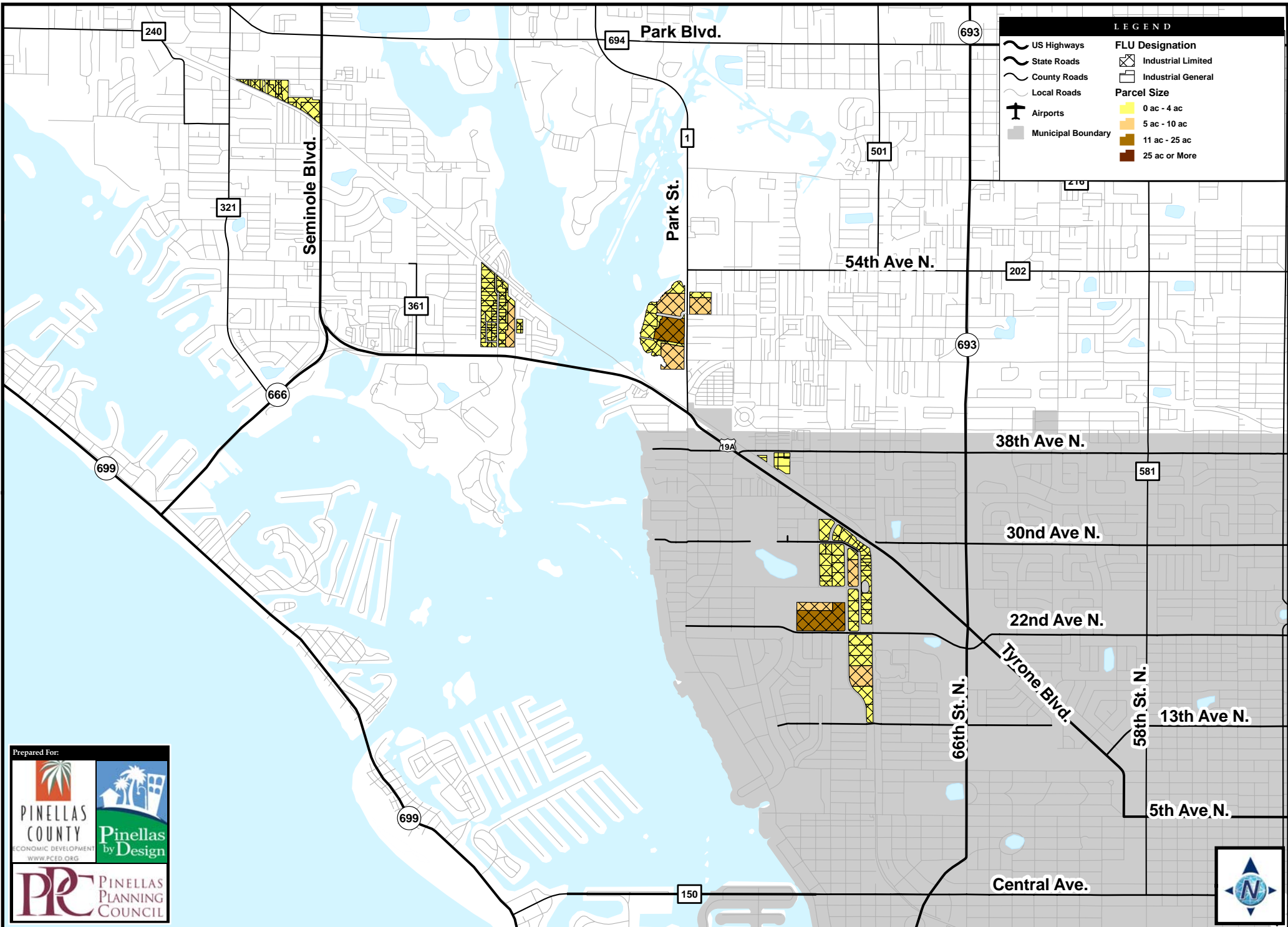
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St. Petersburg Industrial Land Areas - Subarea 2



WilsonMiller
New Directions in Planning, Design & Engineering

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PINELLAS
PLANNING
COUNCIL

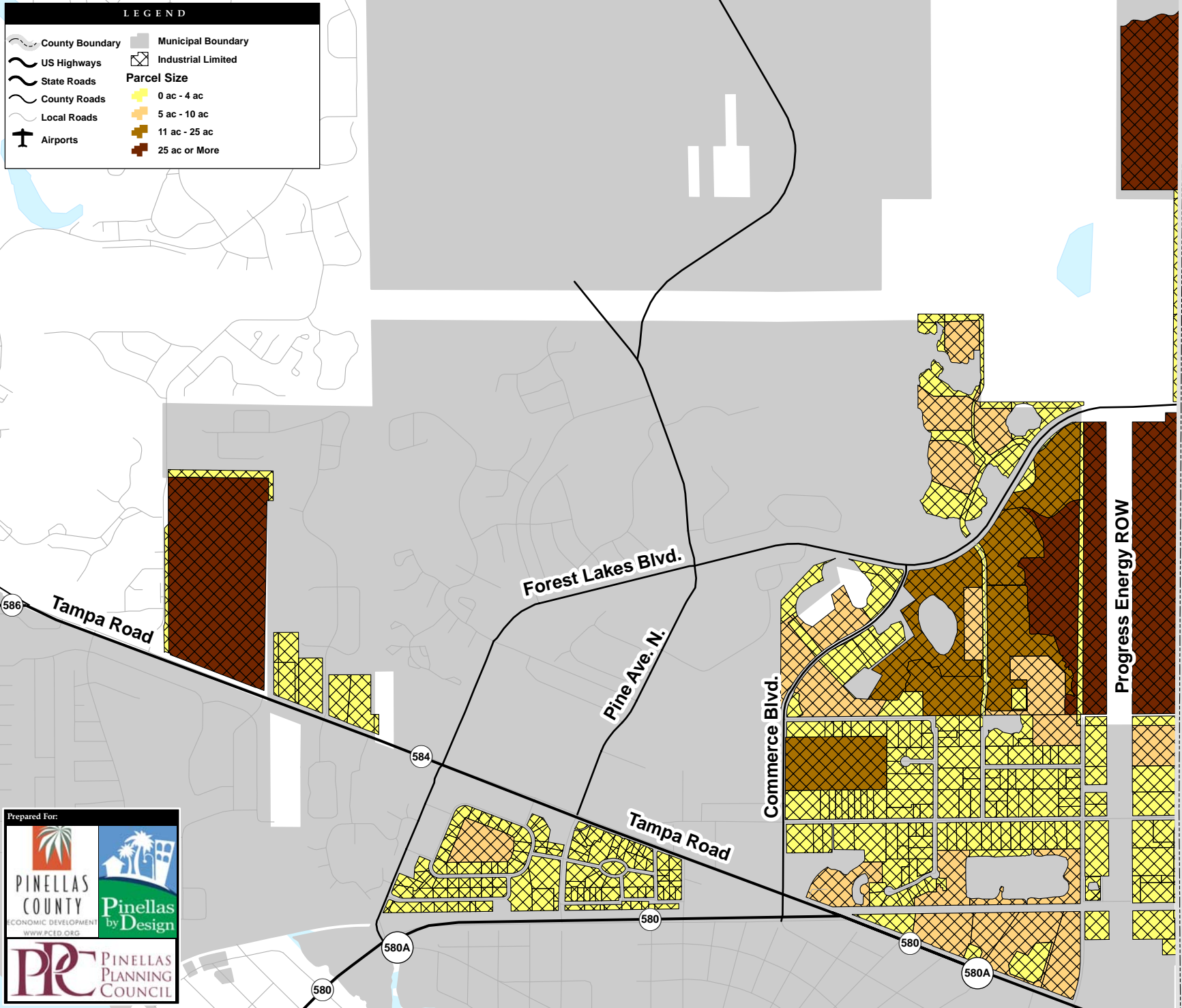


St. Petersburg Industrial Land Areas - Subarea 3

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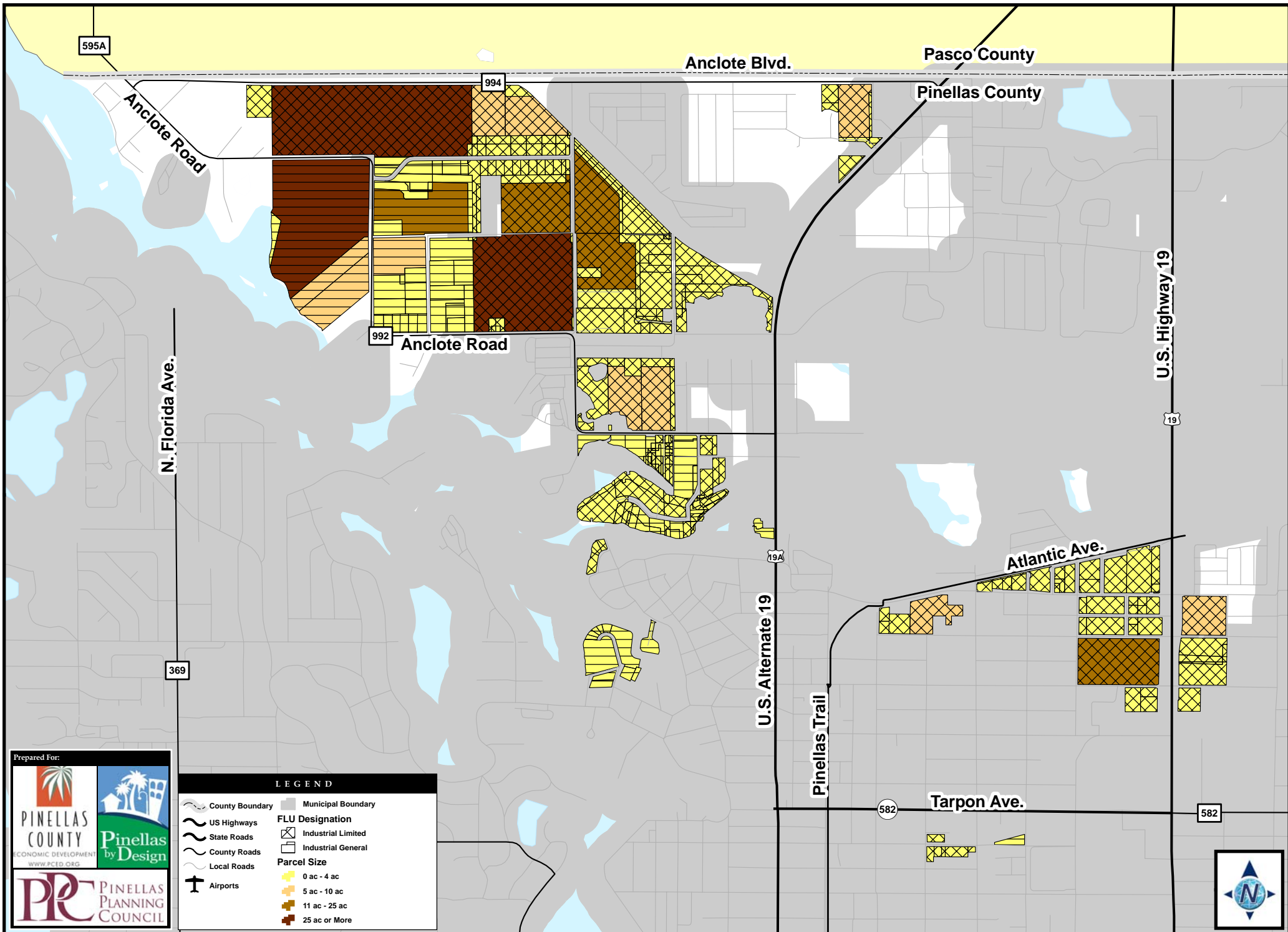
| | |
|-----------------|--------------------|
| County Boundary | Municipal Boundary |
| US Highways | Industrial Limited |
| State Roads | |
| County Roads | Parcel Size |
| Local Roads | 0 ac - 4 ac |
| Airports | 5 ac - 10 ac |
| | 11 ac - 25 ac |
| | 25 ac or More |



Prepared For:

PINELLAS PLANNING COUNCIL





Prepared For:






LEGEND

| | |
|-----------------|--------------------|
| County Boundary | Municipal Boundary |
| US Highways | Industrial Limited |
| State Roads | Industrial General |
| County Roads | Parcel Size |
| Local Roads | 0 ac - 4 ac |
| Airports | 5 ac - 10 ac |
| | 11 ac - 25 ac |
| | 25 ac or More |



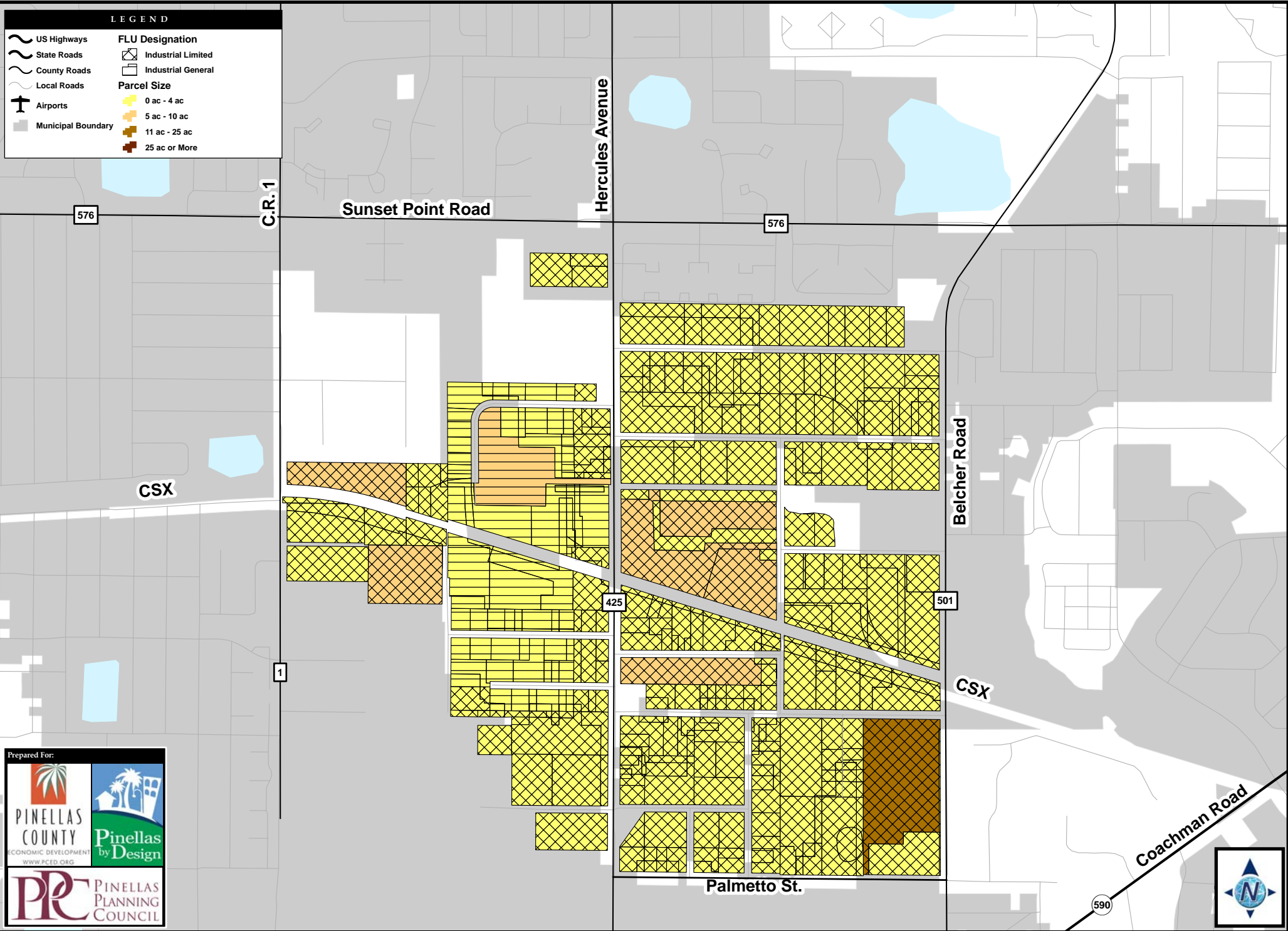
Tarpon Springs Industrial Land Areas



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New Directions in Planning, Design & Engineering

LEGEND

| | |
|--|------------------------|
| | FLU Designation |
| | Industrial Limited |
| | Industrial General |
| | Parcel Size |
| | 0 ac - 4 ac |
| | 5 ac - 10 ac |
| | 11 ac - 25 ac |
| | 25 ac or More |



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ECONOMIC DEVELOPMENT
WWW.PCED.ORG

PINELLAS by Design

PINELLAS PLANNING COUNCIL

0 500 1,000 Feet

Clearwater Industrial Land Areas

WilsonMiller
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Aviation/Aerospace Cluster (49 Businesses)

Industrial Limited - 38 Businesses

Not Industrial FLU - 11 Businesses

County Boundary

US Highways

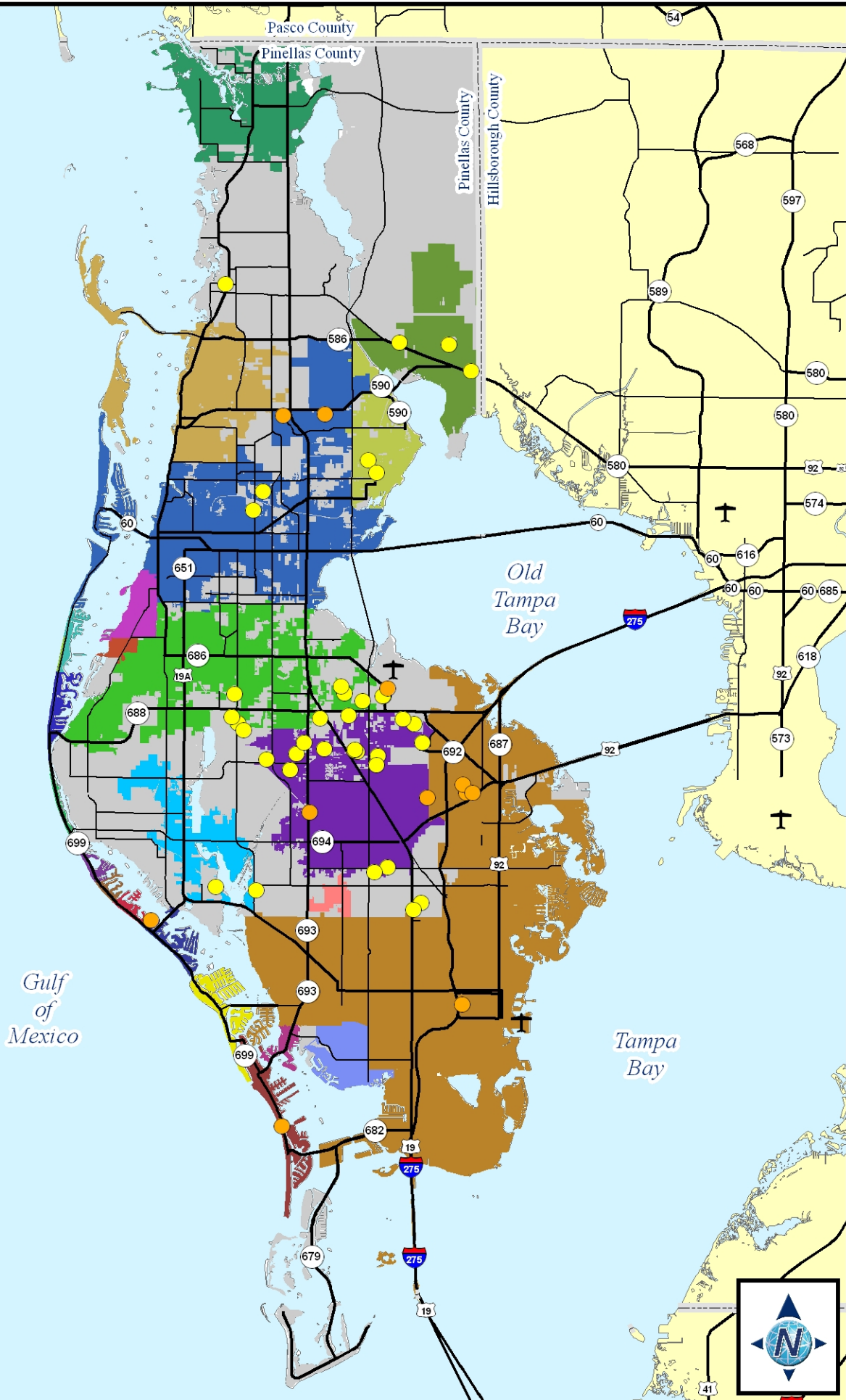
State Roads

County Roads

Airports

Municipalities

- BELLEAIR
- BELLEAIR BEACH
- BELLEAIR BLUFFS
- BELLEAIR SHORE
- CLEARWATER
- DUNEDIN
- GULFPORT
- INDIAN ROCKS BEACH
- INDIAN SHORES
- KENNETH CITY
- LARGO
- MADEIRA BEACH
- N REDINGTON BEACH
- OLDSMAR
- PINELLAS PARK
- REDINGTON BEACH
- REDINGTON SHORES
- SAFETY HARBOR
- SEMINOLE
- SOUTH PASADENA
- ST PETE BEACH
- ST PETERSBURG
- TARPON SPRINGS
- TREASURE ISLAND
- UNINCORPORATED



Prepared For:






Aviation/Aerospace Cluster
Land Use

WilsonMiller
New Directions in Planning, Design & Engineering

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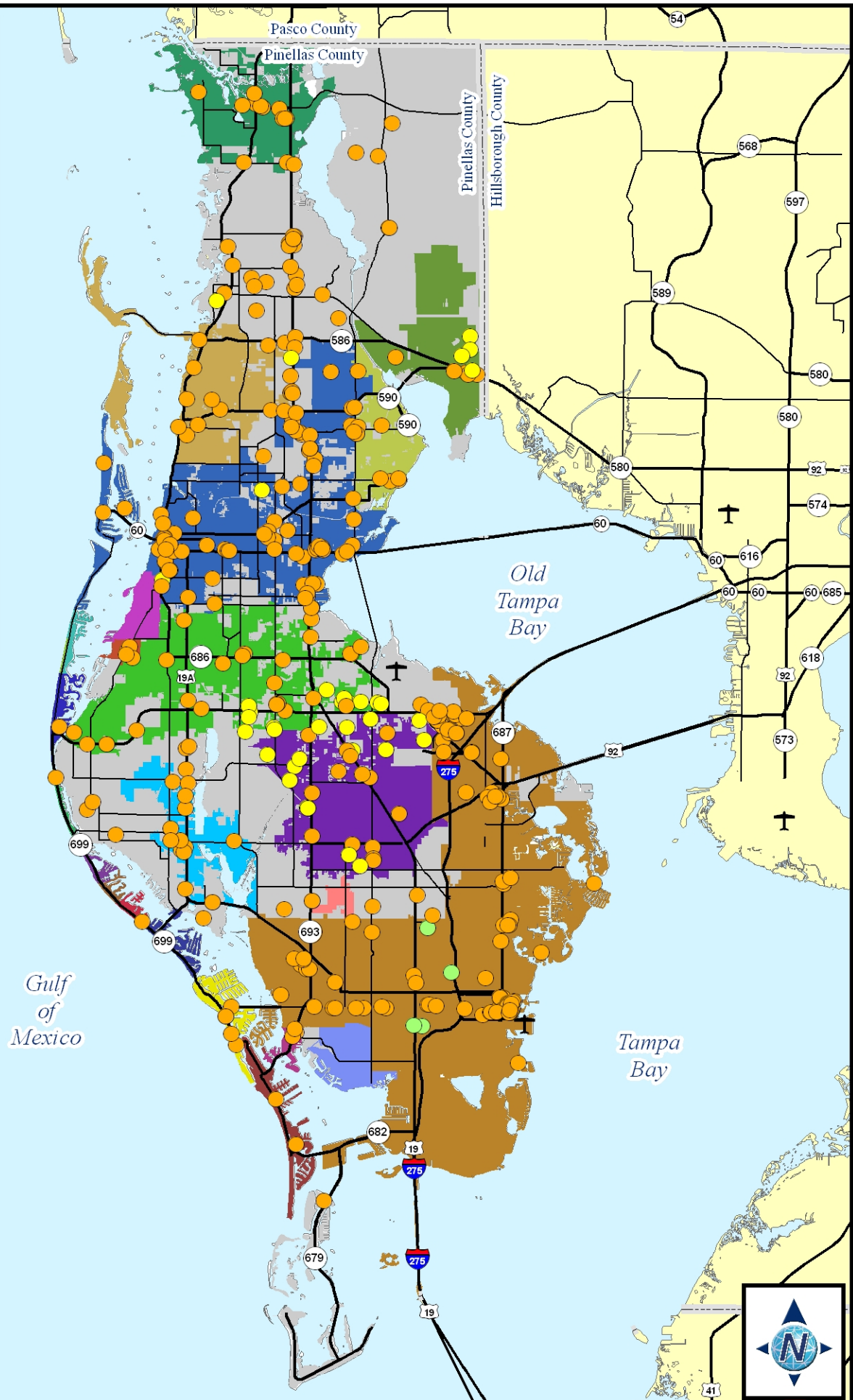
Financial Services Cluster (394 Businesses)

-  Industrial General - 4 Businesses
-  Industrial Limited - 36 Businesses
-  Not Industrial FLU - 354 Businesses

-  County Boundary
 US Highways
 State Roads
 County Roads
 Airports

Municipalities

- BELLEAIR
- BELLEAIR BEACH
- BELLEAIR BLUFFS
- BELLEAIR SHORE
- CLEARWATER
- DUNEDIN
- GULFPORT
- INDIAN ROCKS BEACH
- INDIAN SHORES
- KENNETH CITY
- LARGO
- MADEIRA BEACH
- N REDINGTON BEACH
- OLDSMAR
- PINELLAS PARK
- REDINGTON BEACH
- REDINGTON SHORES
- SAFETY HARBOR
- SEMINOLE
- SOUTH PASADENA
- ST PETE BEACH
- ST PETERSBURG
- TARPON SPRINGS
- TREASURE ISLAND
- UNINCORPORATED

**Prepared For:**

Financial Services Cluster Land Use

Wilson Miller
New Directions In Planning, Design & Engineering

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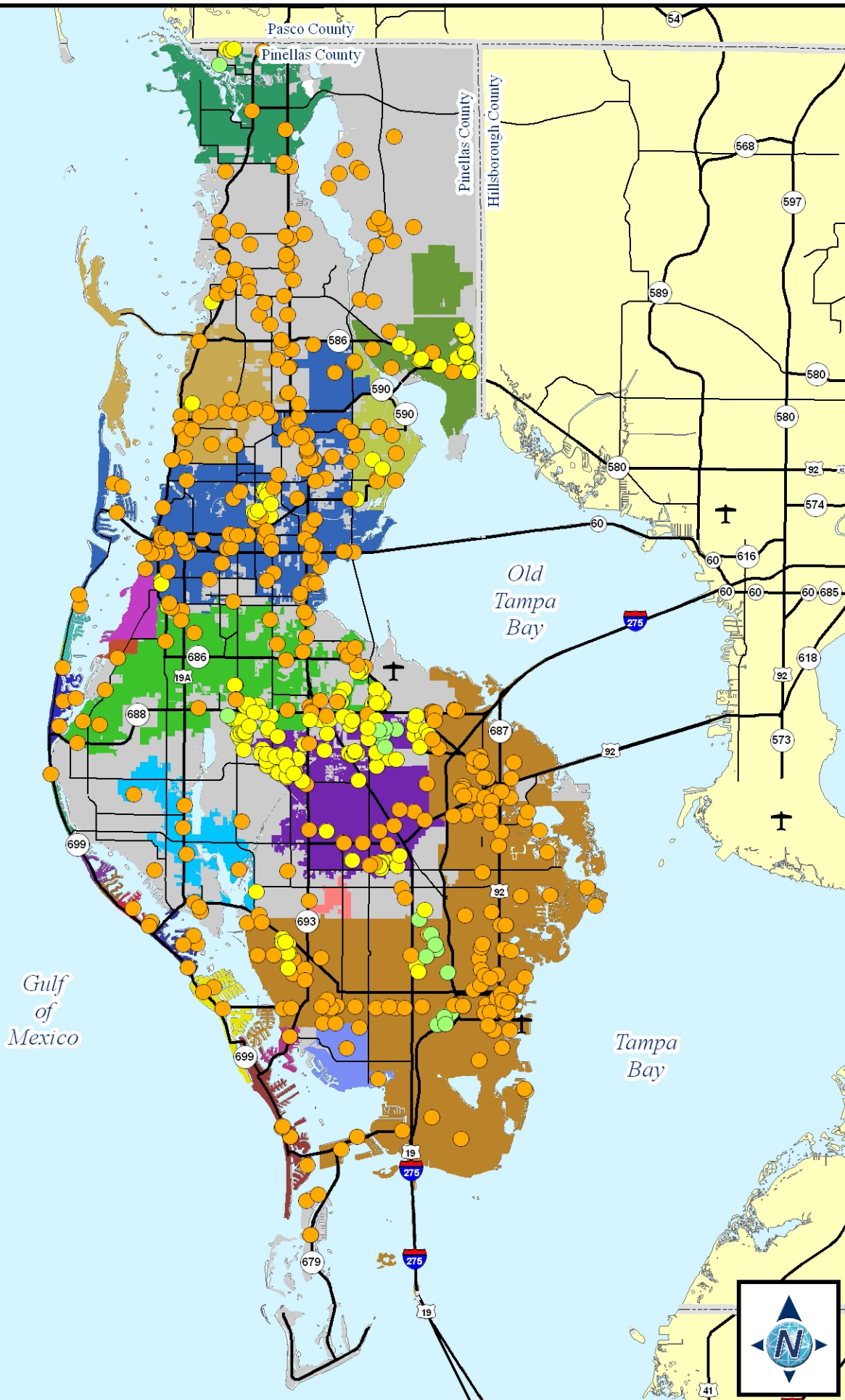
High Tech Cluster (646 Businesses)

- Industrial General - 19 Businesses
- Industrial Limited - 191 Businesses
- Not Industrial FLU - 436 Businesses

- County Boundary
- US Highways
- State Roads
- County Roads
- Airports

Municipalities

- BELLEAIR
- BELLEAIR BEACH
- BELLEAIR BLUFFS
- BELLEAIR SHORE
- CLEARWATER
- DUNEDIN
- GULFPORT
- INDIAN ROCKS BEACH
- INDIAN SHORES
- KENNETH CITY
- LARGO
- MADEIRA BEACH
- N REDINGTON BEACH
- OLDSMAR
- PINELLAS PARK
- REDINGTON BEACH
- REDINGTON SHORES
- SAFETY HARBOR
- SEMINOLE
- SOUTH PASADENA
- ST PETE BEACH
- ST PETERSBURG
- TARPON SPRINGS
- TREASURE ISLAND
- UNINCORPORATED



Prepared For:



0 2 Miles

High Tech Cluster
Land Use

WilsonMiller
New Directions In Planning, Design & Engineering

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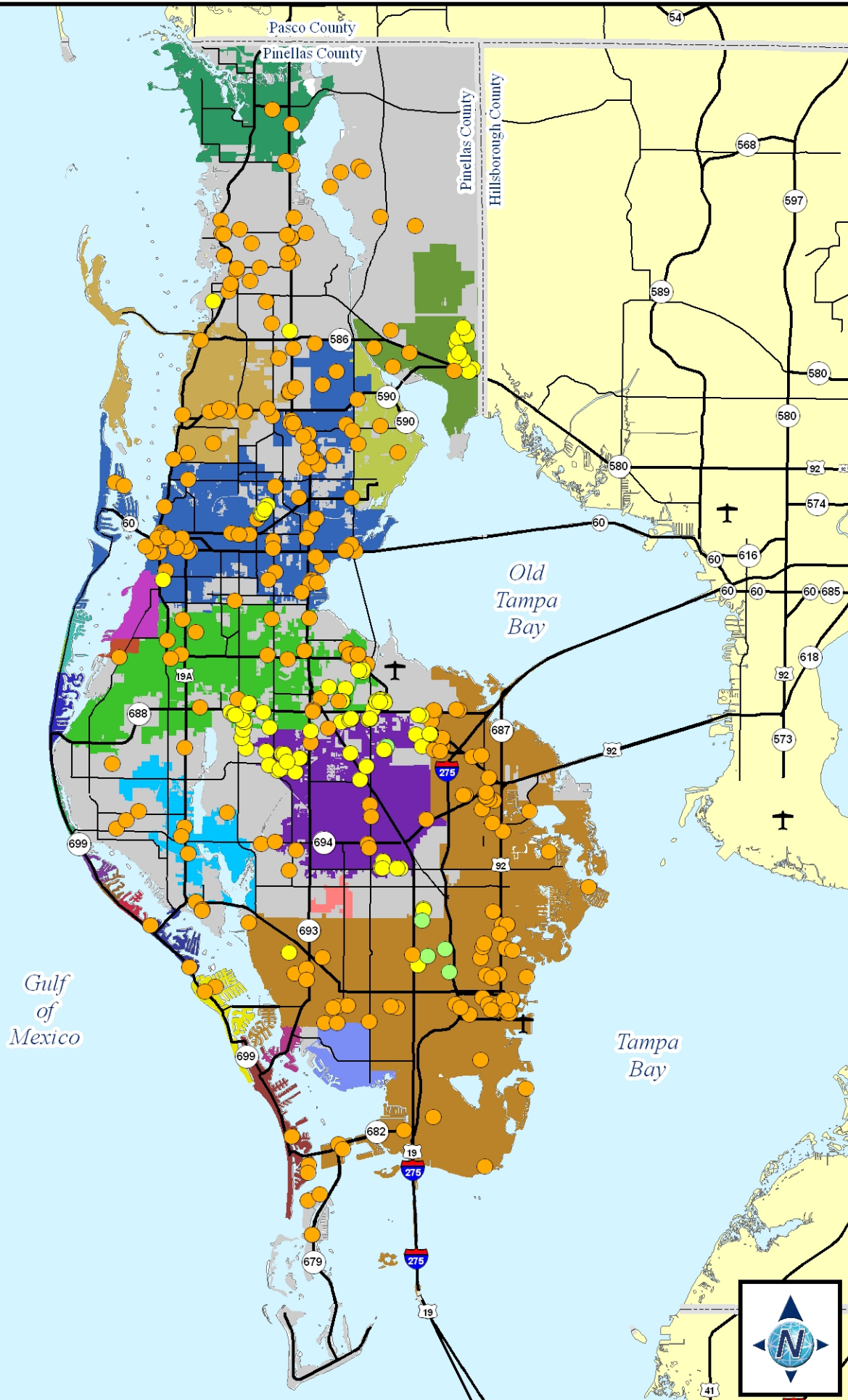
Information Technology Cluster (379 Businesses)

- Industrial General - 5 Businesses
- Industrial Limited - 92 Businesses
- Not Industrial FLU - 282 Businesses

- County Boundary
- US Highways
- State Roads
- County Roads
- Airports

Municipalities

- BELLEAIR
- BELLEAIR BEACH
- BELLEAIR BLUFFS
- BELLEAIR SHORE
- CLEARWATER
- DUNEDIN
- GULFPORT
- INDIAN ROCKS BEACH
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- KENNETH CITY
- LARGO
- MADEIRA BEACH
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- OLDSMAR
- PINELLAS PARK
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- REDINGTON SHORES
- SAFETY HARBOR
- SEMINOLE
- SOUTH PASADENA
- ST PETE BEACH
- ST PETERSBURG
- TARPON SPRINGS
- TREASURE ISLAND
- UNINCORPORATED



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Information Technology Cluster Land Use

WilsonMiller
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LEGEND

Marine Science Cluster (374 Businesses)

- Industrial General - 22 Businesses
- Industrial Limited - 118 Businesses
- Not Industrial FLU - 234 Businesses

County Boundary

US Highways

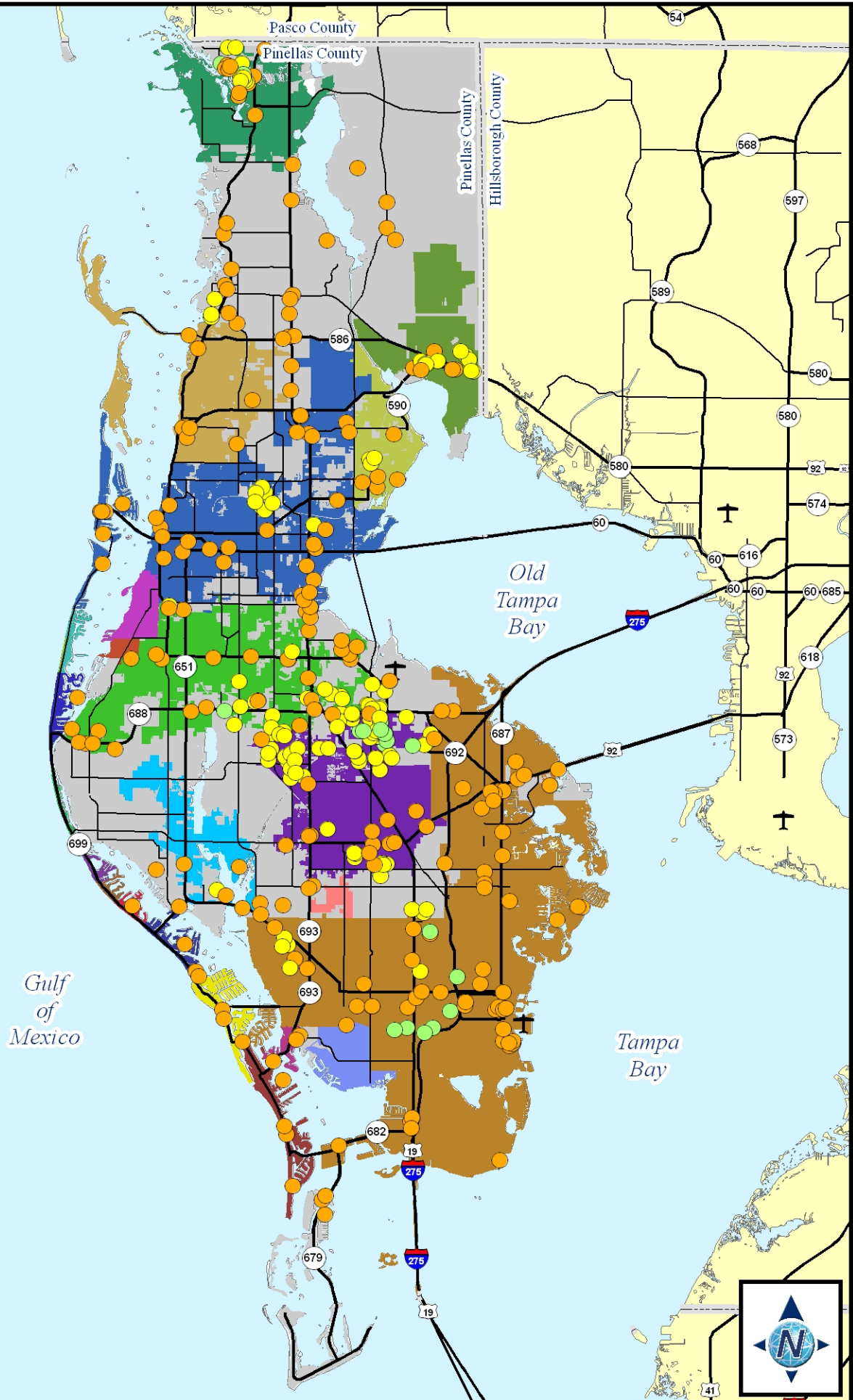
State Roads

County Roads

Airports

Municipalities

- BELLEAIR
- BELLEAIR BEACH
- BELLEAIR BLUFFS
- BELLEAIR SHORE
- CLEARWATER
- DUNEDIN
- GULFPORT
- INDIAN ROCKS BEACH
- INDIAN SHORES
- KENNETH CITY
- LARGO
- MADEIRA BEACH
- N REDINGTON BEACH
- OLDSMAR
- PINELLAS PARK
- REDINGTON BEACH
- REDINGTON SHORES
- SAFETY HARBOR
- SEMINOLE
- SOUTH PASADENA
- ST PETE BEACH
- ST PETERSBURG
- TARPON SPRINGS
- TREASURE ISLAND
- UNINCORPORATED



The logos for the Pinellas County Economic Development and Pinellas Planning Council are displayed. The Pinellas County Economic Development logo features a stylized palm tree icon above the text "PINELLAS COUNTY ECONOMIC DEVELOPMENT" and the website "WWW.PCED.ORG". The Pinellas Planning Council logo features a stylized graphic of a house and palm trees above the text "Pinellas by Design". Below these, the Pinellas Planning Council logo is shown, consisting of a large stylized "PPC" monogram and the text "PINELLAS PLANNING COUNCIL".

Wilson Miller
New Directions In Planning, Design & Engineering

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LEGEND

Medical Technology Cluster (181 Businesses)

- Industrial General - 3 Businesses
- Industrial Limited - 81 Businesses
- Not Industrial FLU - 97 Businesses

County Boundary

US Highways

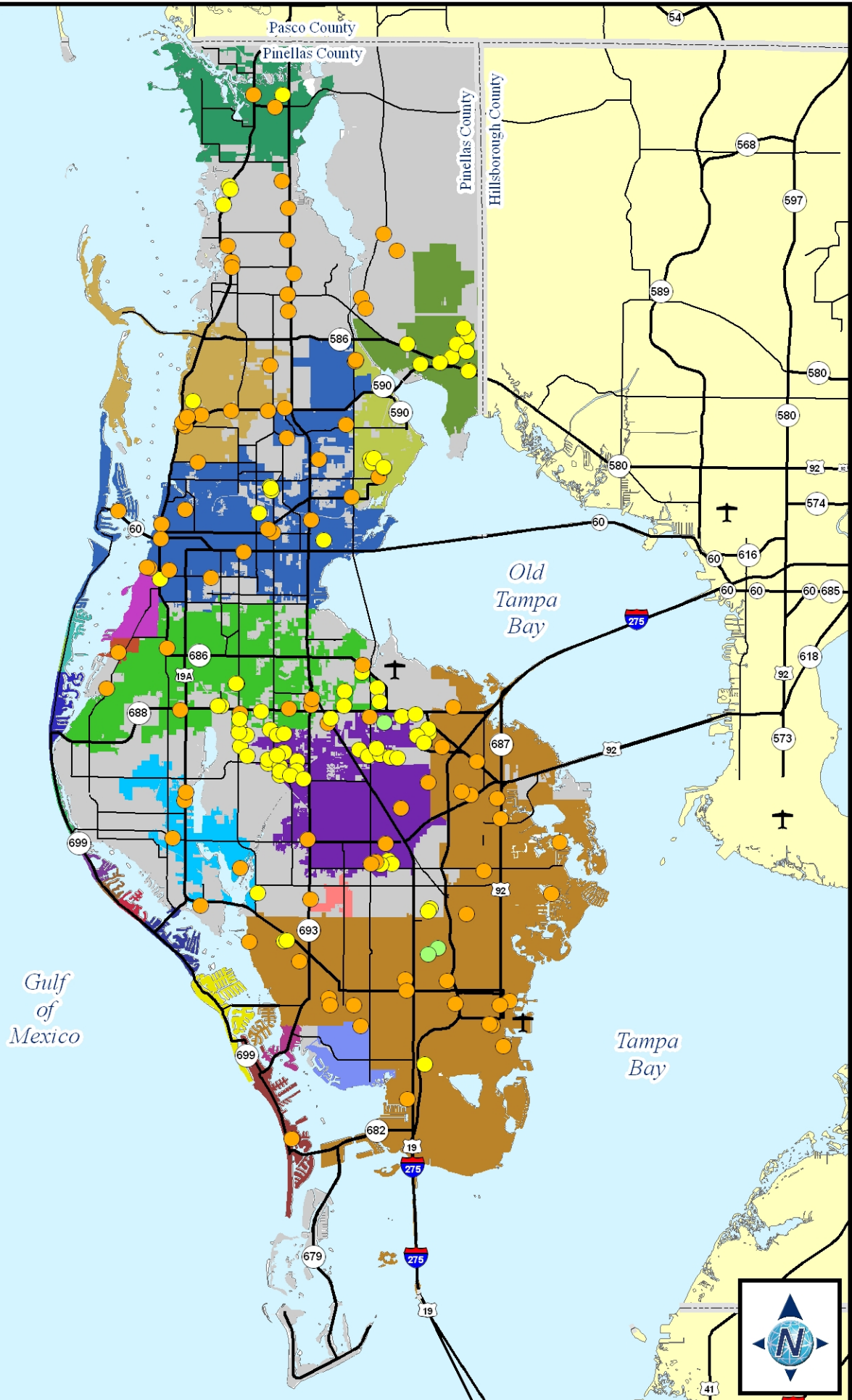
State Roads

County Roads

Airports

Municipalities

- BELLEAIR
- BELLEAIR BEACH
- BELLEAIR BLUFFS
- BELLEAIR SHORE
- CLEARWATER
- DUNEDIN
- GULFPORT
- INDIAN ROCKS BEACH
- INDIAN SHORES
- KENNETH CITY
- LARGO
- MADEIRA BEACH
- N REDINGTON BEACH
- OLDSMAR
- PINELLAS PARK
- REDINGTON BEACH
- REDINGTON SHORES
- SAFETY HARBOR
- SEMINOLE
- SOUTH PASADENA
- ST PETE BEACH
- ST PETERSBURG
- TARPON SPRINGS
- TREASURE ISLAND
- UNINCORPORATED



The block contains two logos. On the left is the Pinellas County Economic Development logo, featuring a palm tree icon above the text "PINELLAS COUNTY ECONOMIC DEVELOPMENT" and the website "WWW.PCED.ORG". On the right is the Pinellas Planning Council logo, featuring a stylized house and palm trees above the text "Pinellas by Design" and "PINELLAS PLANNING COUNCIL".

Medical Technology Cluster Land Use

Wilson Miller
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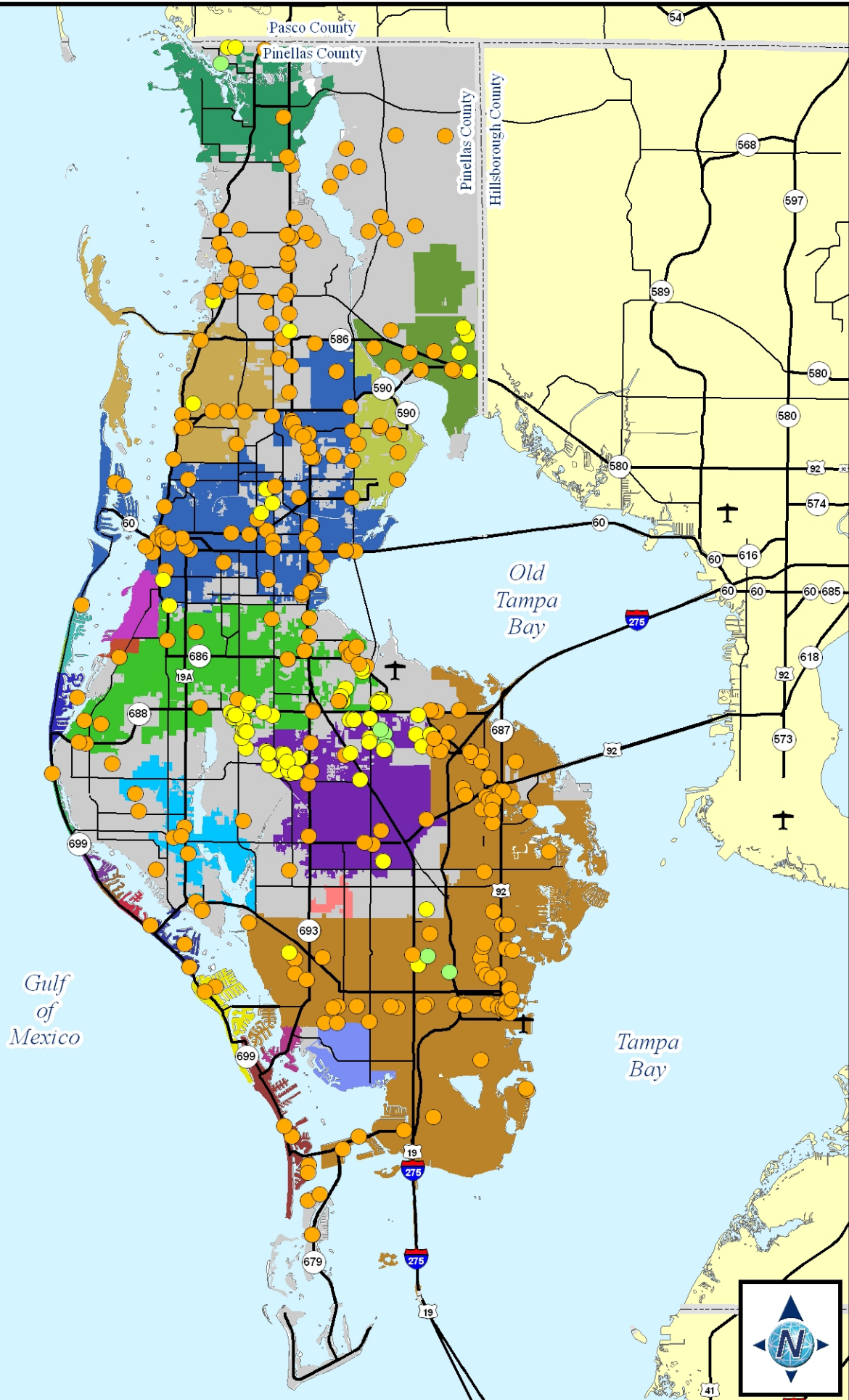
Micro Cluster (385 Businesses)

- Industrial General - 7 Businesses
- Industrial Limited - 79 Businesses
- Not Industrial FLU - 279 Businesses

- County Boundary
- US Highways
- State Roads
- County Roads
- Airports

Municipalities

- BELLEAIR
- BELLEAIR BEACH
- BELLEAIR BLUFFS
- BELLEAIR SHORE
- CLEARWATER
- DUNEDIN
- GULFPORT
- INDIAN ROCKS BEACH
- INDIAN SHORES
- KENNETH CITY
- LARGO
- MADEIRA BEACH
- N REDINGTON BEACH
- OLDSMAR
- PINELLAS PARK
- REDINGTON BEACH
- REDINGTON SHORES
- SAFETY HARBOR
- SEMINOLE
- SOUTH PASADENA
- ST PETE BEACH
- ST PETERSBURG
- TARPON SPRINGS
- TREASURE ISLAND
- UNINCORPORATED



Prepared For:



Microelectronics Cluster Land Use

WilsonMiller
New Directions In Planning, Design & Engineering

0 1 2 Miles

LEGEND

Model / Simulation (49 Businesses)

- Industrial General - 2 Businesses
- Industrial Limited - 31 Businesses
- Not Industrial FLU - 16 Businesses

County Boundary

US Highways

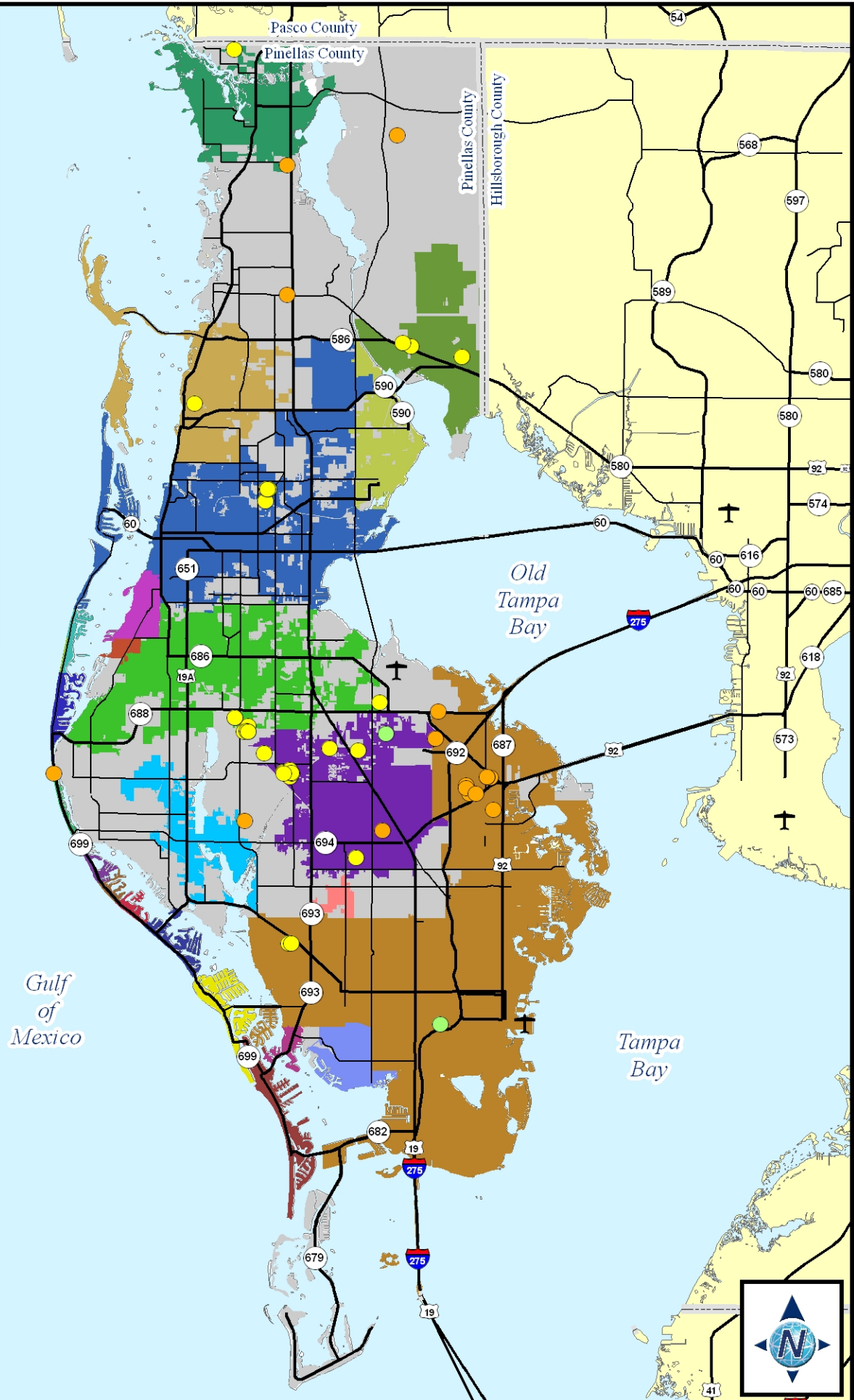
State Roads

County Roads

Airports

Municipalities

- BELLEAIR
- BELLEAIR BEACH
- BELLEAIR BLUFFS
- BELLEAIR SHORE
- CLEARWATER
- DUNEDIN
- GULF PORT
- INDIAN ROCKS BEACH
- INDIAN SHORES
- KENNETH CITY
- LARGO
- MADEIRA BEACH
- N REDINGTON BEACH
- OLDSMAR
- PINELLAS PARK
- REDINGTON BEACH
- REDINGTON SHORES
- SAFETY HARBOR
- SEMINOLE
- SOUTH PASADENA
- ST PETE BEACH
- ST PETERSBURG
- TARPON SPRINGS
- TREASURE ISLAND
- UNINCORPORATED



The logos for the Pinellas County Economic Development and Pinellas Planning Council are displayed. The Pinellas County Economic Development logo features a stylized palm tree icon above the text "PINELLAS COUNTY ECONOMIC DEVELOPMENT" and the website "WWW.PCED.ORG". The Pinellas Planning Council logo features a stylized "PPC" monogram and the text "PINELLAS PLANNING COUNCIL".




Modeling / Simulation Cluster

Wilson Miller
New Directions In Planning, Design & Engineering

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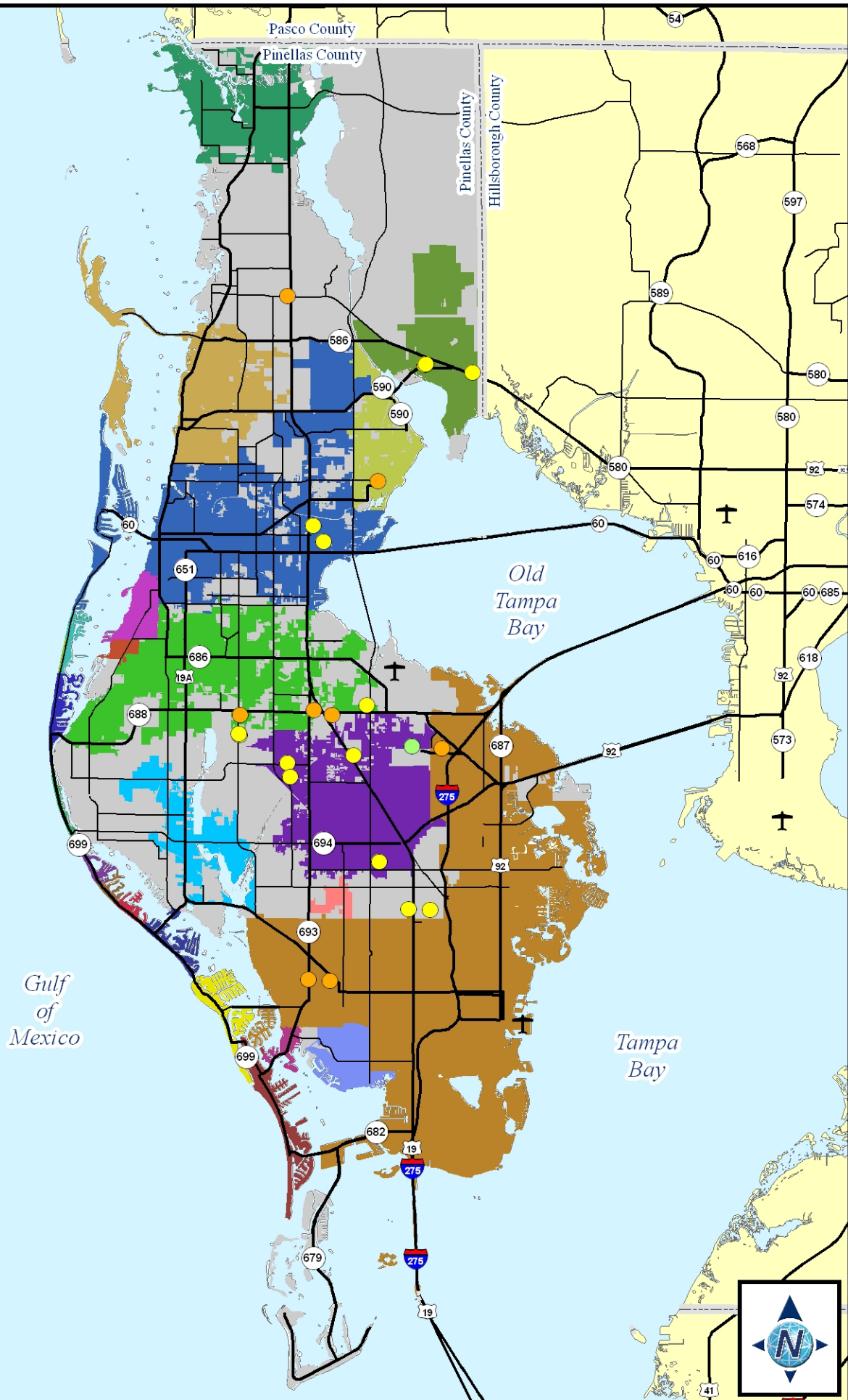
Optics / Photonics Cluster (23 Businesses)

-  Industrial General - 1 Business
-  Industrial Limited - 14 Businesses
-  Not Industrial FLU - 8 Businesses

 County Boundary US Highways State Roads County Roads Airports

Municipalities

- BELLEAIR
- BELLEAIR BEACH
- BELLEAIR BLUFFS
- BELLEAIR SHORE
- CLEARWATER
- DUNEDIN
- GULFPORT
- INDIAN ROCKS BEACH
- INDIAN SHORES
- KENNETH CITY
- LARGO
- MADEIRA BEACH
- N REDINGTON BEACH
- OLDSMAR
- PINELLAS PARK
- REDINGTON BEACH
- REDINGTON SHORES
- SAFETY HARBOR
- SEMINOLE
- SOUTH PASADENA
- ST PETE BEACH
- ST PETERSBURG
- TARPON SPRINGS
- TREASURE ISLAND
- UNINCORPORATED

**Prepared For:**

Optics / Photonics Cluster
Land Use

Wilson Miller
New Directions In Planning, Design & Engineering

Location: G:\Projects\B7E0_PRC_Media\B0024\20070905\B7E0_PRC_Opin_PJI_Inf_S_S-11-060607-1-01843.mxd

LEGEND

Research and Development Cluster (296 Businesses)

- Industrial General - 3 Businesses
- Industrial Limited - 50 Businesses
- Not Industrial FLU - 243 Businesses

County Boundary

US Highways

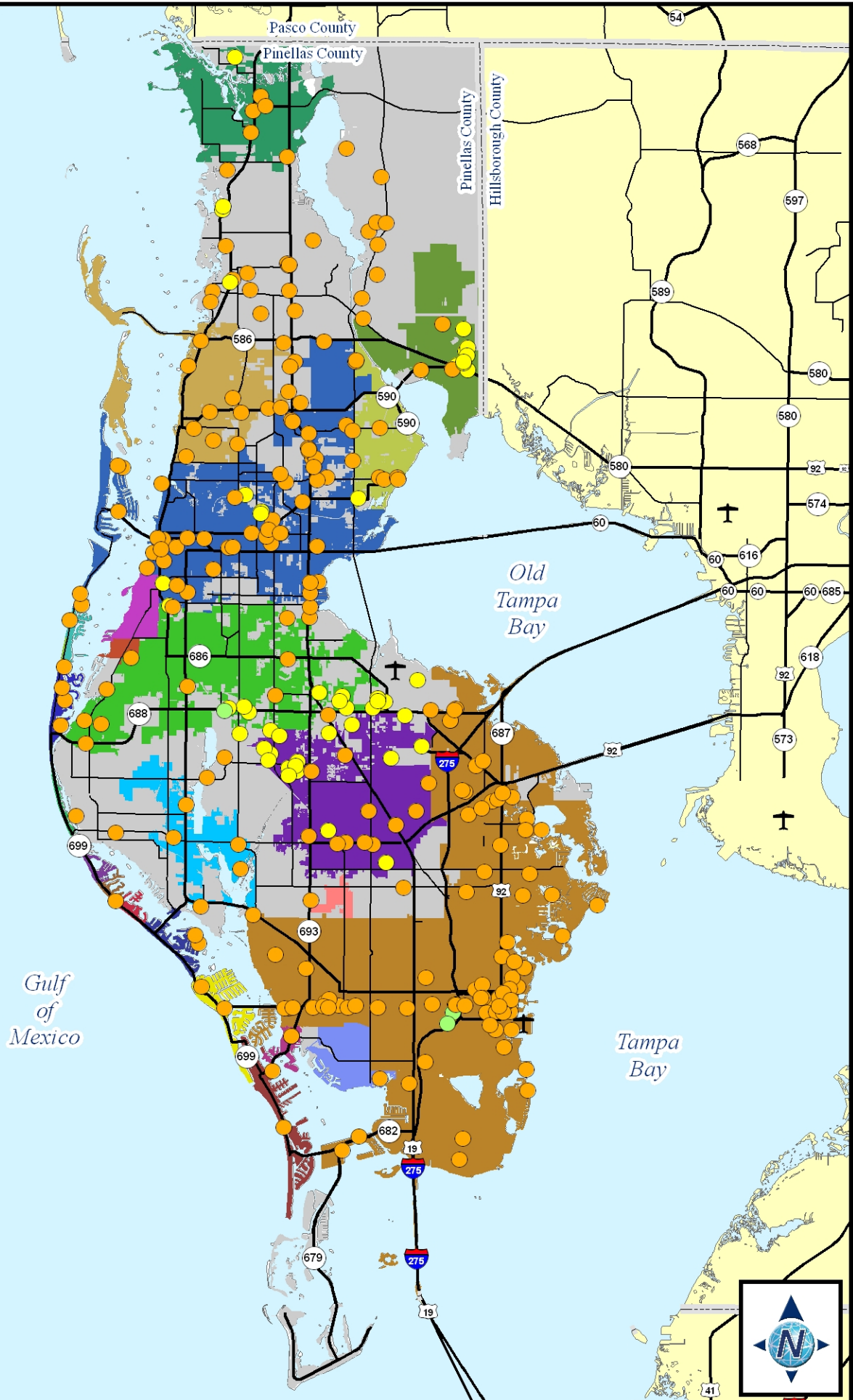
State Roads

County Roads

Airports

Municipalities

- BELLEAIR
- BELLEAIR BEACH
- BELLEAIR BLUFFS
- BELLEAIR SHORE
- CLEARWATER
- DUNEDIN
- GULF PORT
- INDIAN ROCKS BEACH
- INDIAN SHORES
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The block contains two logos. The top logo is for Pinellas County Economic Development, featuring a stylized palm tree in a red square, the text "PINELLAS COUNTY" in large black letters, "ECONOMIC DEVELOPMENT" in smaller black letters, and the website "WWW.PCED.ORG". The bottom logo is for the Pinellas Planning Council, featuring a large stylized "PPC" in maroon and the text "PINELLAS PLANNING COUNCIL" in maroon.

Research and Development Cluster Land Use

Wilson Miller
New Directions In Planning, Design & Engineering

Location: G:\Projects\07760_PPC_Munira\0070702010\07760_PPC_Research_PUJ\vol 5 5 x11 002010 2 01843.mxd

LEGEND

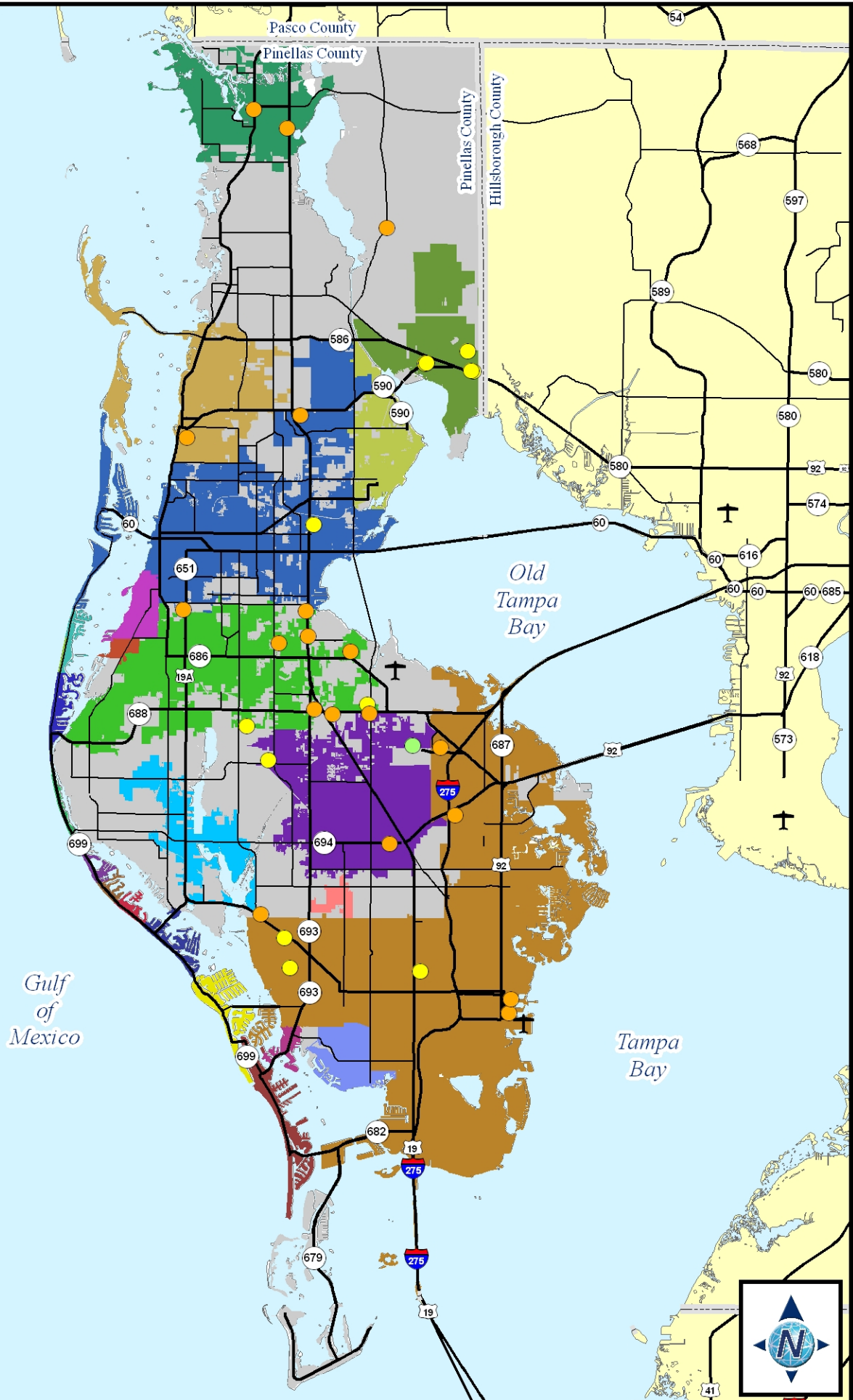
Wireless Technology Cluster (32 Businesses)

- Industrial General - 1 Business
- Industrial Limited - 12 Businesses
- Not Industrial FLU - 19 Businesses

- County Boundary
- US Highways
- State Roads
- County Roads
- Airports

Municipalities

- BELLEAIR
- BELLEAIR BEACH
- BELLEAIR BLUFFS
- BELLEAIR SHORE
- CLEARWATER
- DUNEDIN
- GULFPORT
- INDIAN ROCKS BEACH
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- KENNETH CITY
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- MADEIRA BEACH
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- ST PETERSBURG
- TARPON SPRINGS
- TREASURE ISLAND
- UNINCORPORATED



Prepared For:



PINELLAS COUNTY
ECONOMIC DEVELOPMENT
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Pinellas by Design



PINELLAS PLANNING COUNCIL

Wireless Technology Cluster Land Use

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Created: Thursday, September 8, 2011 3:05:40 AM
Location: C:\ProgramData\WilsonMiller\Projects\PinellasCounty\WirelessTechnologyCluster\MapData\MapData.mxd