

**PINELLAS PLANNING COUNCIL  
AGENDA MEMORANDUM**

**Preliminary for  
PAC Review Only**

**AGENDA ITEM:**

**MEETING DATE:** February 21, 2007

**SUBJECT:**

Industrial Land Study Status Report

**RECOMMENDATION:**

Council Receive And Discuss As Determined Appropriate  
(Information Only - No Action Required)

**BACKGROUND**

In September 2006, a contract was entered into between the Pinellas Planning Council, Pinellas County, through its Economic Development Department (PCED), and WilsonMiller consultants. The intent of the contact was the "identification of proposed measures that will assist in retaining and attracting high-wage primary businesses" to Pinellas County. The objectives of the project were (1) "to identify, through a survey of targeted industries, the land-based needs of these industries; and (2) to identify governmental actions that will assist in the retention/attraction of targeted industries and any regulatory impediments thereto, as well as to establish criteria that will guide any proposed conversion of industrially-designated lands." The first objective (a survey of targeted industries) has been completed. This memo provides an overview of the survey and some preliminary results.

Working with staff from the PPC and PCED, WilsonMiller produced a targeted industries survey (see Page 6 of this memo). Targeted industries were identified in *Pinellas by Design, An Economic Development and Redevelopment Plan for the Pinellas Community* as being primary in nature (those that bring in money from outside of the local area), pay average wages that will reach annual pay scale milestones, are growing nationally and in the State of Florida.

Prior to sending the actual survey, a pre-survey alert post card was sent to the targeted industries. The purpose of the post card was to inform recipients that they were to receive the forthcoming survey. Of all industries in Pinellas County, 2,273 primary ones received

**PINELLAS PLANNING COUNCIL ACTION:**

**COUNTYWIDE PLANNING AUTHORITY ACTION:**

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surveys. As of January 31, 2007, 405 surveys had been returned for a nearly 18 percent return rate. While a January 22<sup>nd</sup> date had been set for receipt of returned surveys, as of the date this memo is being written (February 6<sup>th</sup>), surveys are still being received. Tentatively, February 16<sup>th</sup> has been chosen as the end date for receipt so that analysis of the data can proceed to completion.

Preliminary Survey Results

Preliminary, selected results from the 405 returned surveys are presented below. Note that the number of respondents varies among the questions because not all respondents answered all of the questions. Analysis of the results is now being undertaken and will be reported to the Council and other interested parties when completed.

Survey Question 1. Of the 405 surveys received, the breakdown for ownership status by number of firms was:

<b>Ownership Status</b>	<b>#</b>	<b>%</b>
Home-based	43	10.7%
Owns building and land	130	32.4%
Rents or leases entire building	58	14.5%
Rents or leases office space	170	42.4%
Subtotal	401	100.0%
(No response)	4	
Total responses	405	

Survey Question 2. This question asked about the number of employees businesses currently have. Note that businesses having 24 or fewer employees comprise nearly 75 percent of the targeted industries.

<b>Employment Range</b>	<b>#</b>	<b>%</b>
Under 5	87	22.8%
5 to 9	94	24.6%
10 to 24	98	25.7%
25 to 49	45	11.8%
50 to 99	27	7.1%
100 to 249	19	5.0%
250 to 499	8	2.1%
1,000 to 2,499	1	0.3%
2,500 to 4,999	2	0.5%
	1	0.3%
Subtotal	382	100.0%
(No response)	23	
Total responses	405	

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Raw numbers from Question 3 indicate that the greatest percentage of businesses are in the finance/insurance/real estate business sector (17.9%) which was followed by consulting (13.4%), services (11.9%) and computing, general manufacturing or fabrication, and marine all with approximately 10 percent.

According to the responses to Question 4, slightly over 35 percent of products or services are sold within Pinellas County.

Question 8 asked about the main activity at the business site. Of the 399 respondents, 312 (78%) business were engaged in office activities. Office use was followed by storage/distribution (117 or 29%) and manufacturing/fabrication/production (106 or 27%), laboratory/research and development (52 or 13%), and 39 for retail (10%). Sixty-eight of the respondents were engaged in “other” activities.

Question 10 asked about how well the current location met the respondent’s business needs. Most of the 405 respondents (368 or 91%) felt that those needs were being met. Likewise, most of the other criteria including, among others, floor area, parking, customers, and suppliers, received positive responses. However, 127 (35%) respondents did feel that some costs were too high in Pinellas County.

In Question 11, the survey asked whether the nature of businesses required industrial-type or commercial-type zoning or land use designations, both of them, or neither of them. Of the 400 respondents, 174 (44%) indicated that they needed commercial-type designations while 67 (17%) needed industrial, 53 (13%) both, and 106 (27%) neither.

The majority (324 of 397 respondents) indicated that their business had no physical constraints that restrict their operations. Of the 73 that did indicate there were some physical constraints, 14 said that proximity to residential developments constrained them.

When asked if zoning, land use, or regulatory changes on properties near or abutting their business location negatively affected them, the majority (352 of 382 respondents) indicated that there were none.

The survey also asked whether businesses had sufficient space to expand at their current location. Of the 393 respondents, 187 (48%) indicated that they had sufficient space, however 166 (42%) said that they had insufficient space. Nineteen said that regulations permit expansion, but 23 said that regulations do not permit expansion. When asked about their site requirements over the next five years, 162 (46%) of the 354 respondents said that they will need more space. Relocation was anticipated by 100 (28%) respondents and 46 (13%) looked forward to opening a new site.

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Of the 258 respondents who indicated that they will be looking for a new site, 186 (72%) said that they would choose a site close to their current location in Pinellas County. Fifty-five (21%) would look outside of Pinellas County, and 36 (14%) would investigate moving outside of Florida.

Question 19 asked about the quality of a number of factors including the availability of appropriate sites within the county, site costs, transportation access, workforce availability, the business environment, and the cost of doing business. The table below presents some of the responses.

<b>Factor</b>	<b>Excellent</b>	<b>Good</b>	<b>Fair</b>	<b>Poor</b>	<b>No Answer</b>
Availability of sites	39	120	101	49	96
Cost of sites	17	75	123	95	95
Quality of sites	22	129	111	36	107
Airport access	88	156	28	4	129
Highway access	109	142	42	17	95
Skilled labor availability	27	120	127	52	79
Transit availability	24	101	78	43	159
Government regulation/taxes	12	60	166	97	70
Insurance costs	12	15	69	234	75
Labor costs	14	116	168	31	76
Workman's comp	11	66	149	96	83

Question 19 also asked respondents to choose their five most important factors. The 276 respondents indicated the following:

Under the “land” category, the cost of sites ranked highest with 107 (39%) responses followed by the ability to expand with 78 (28%) responses.

Access to highways ranked highest under the “transportation” category with 80 (29%) responses followed by airport access with 60 (22%) responses.

The greatest overall response rate went to the 155 (56%) in the “workforce” category who said that skilled labor availability ranked highest in importance. In the same category 103 (37%) said that housing availability ranked very high.

Customer proximity ranked highest in the “business environment” category with 97 responses.

In the “cost of doing business” category, 127 (46%) respondents ranked insurance costs highest followed closely by government regulations/taxes with 120 (43%) responses and 105 (38%) labor costs.

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Question 21 asked whether land use or zoning regulations prevent businesses from performing up to their potential. Of the 391 responses, only 49 (13%) said yes.

In Question 22, the survey asked respondents to identify potential solutions for any problems they are facing. The following table indicates the responses from 405 surveys. Note the importance of protecting commercial and industrial sites as well as the importance of better roads.

<b>Factor</b>	<b>Very Important</b>	<b>Somewhat Important</b>	<b>Not Important</b>	<b>No Answer</b>
Relax planning policies	80	128	70	127
More incubator space	50	126	91	138
Protect commercial sites	117	138	55	95
Protect industrial sites	89	125	73	118
More live/work units	54	104	115	132
More commercial land	52	143	100	110
More industrial land	53	108	108	136
More workforce housing	93	133	83	96
More transit	70	140	90	105
Better roads	146	136	46	77
Other	39	2	3	361

Now that the survey has been done and the preliminary information compiled, analysis can take place. Over the next month, staff and the consultant team will endeavor to ascertain what the survey responses mean and what actions government agencies should take to respond to them.

**Pinellas County Target Industry Needs Survey  
The Industrial Land and Related Regulatory Evaluation for Pinellas County Study**

The purpose of this survey is to collect information on the way that your business uses building space and land at the address to which we have mailed this survey. If you do not conduct business at this address, please provide information for your primary business location in Pinellas County.

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
  
2. Approximately how many employees does your business currently employ at this location? \_\_\_\_\_
  
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) _____	
  
4. Please estimate the percentage of your products / services that are sold:  

<b>Inside</b> Pinellas County:	_____ %
<b>Outside</b> Pinellas County, but <b>Inside</b> the Tampa Bay region:	_____ %
<b>Outside</b> Tampa Bay, but <b>Inside</b> Florida:	_____ %
<b>Outside</b> Florida, but <b>Inside</b> the United States:	_____ %
<b>Outside</b> the United States:	_____ %
<b>Total:</b>	<u>                  </u> %
  
5. Was your business founded/started in Pinellas County?                      Yes                       No
  
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 firm.  
 This site is the headquarters of a larger firm.
  
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
  
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: \_\_\_\_\_ ( \_\_\_\_\_ %)

## Pinellas County Target Industry Needs Survey

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

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"/>

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

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 (e.g., outside storage is prohibited and/or truck traffic to/from our location is restricted)
- Environmental conditions or limitations (e.g., odor, noise, wetlands, etc.)
- Other: \_\_\_\_\_

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: \_\_\_\_\_

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: \_\_\_\_\_

## Pinellas County Target Industry Needs Survey

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: \_\_\_\_\_
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 and development park
  - Small-scale start-up space / business incubator
  - A live/work unit / home office
  - Other: \_\_\_\_\_
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
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: \_\_\_\_\_

## Pinellas County Target Industry Needs Survey

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"/>
<b>Transportation</b>						
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"/>
<b>Workforce</b>						
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"/>
<b>Business environment</b>						
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"/>
<b>Cost of doing business</b>						
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"/>

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

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

Comment(s): \_\_\_\_\_

## Pinellas County Target Industry Needs Survey

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"/>

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: \_\_\_\_\_

24. If you have any additional comments, please add them here.

## Pinellas County Target Industry Needs Survey

25. Would you like to be contacted by the Pinellas County Economic Development Department about any of the issues you raised in this survey? Yes  No

If so, please fill in your contact information below.

Name and Title: \_\_\_\_\_

Company: \_\_\_\_\_

Zip Code: \_\_\_\_\_

Telephone: \_\_\_\_\_

E-Mail: \_\_\_\_\_

Thank you for taking the time to fill in this survey. The results will play an important part in helping Pinellas County plan for future business needs. Please return the completed form by January 22<sup>nd</sup>, 2007 in the postage paid envelope provided.

If you have any questions regarding this survey, please contact Laura Berkowitz with Pinellas County Economic Development at (727) 464-7344 or at lberkowi@co.pinellas.fl.us.