

**PINELLAS PLANNING COUNCIL
AGENDA MEMORANDUM**

AGENDA ITEM: IV. C.

MEETING DATE: May 16, 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 contract was the “identification of proposed measures that will assist in retaining and attracting high-wage primary businesses” to Pinellas County.

The objectives of the Industrial Lands Study 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 and the results tallied. In addition to the survey, a variety of maps have been prepared and an industrial lands data base created.

Representatives from WilsonMiller presented the survey results and associated maps to the Board of County Commissioners at work session on May 7th. A similar presentation will be made to Council at the May meeting. Additionally the consultants will provide Council with information about subsequent steps and the schedule related to the Industrial Lands Study. A copy of the presentation is attached.

PINELLAS PLANNING COUNCIL ACTION:

COUNTYWIDE PLANNING AUTHORITY ACTION:

Industrial Land Study

Pinellas Planning Council
Update Presentation
May 16, 2007



Wilson Miller

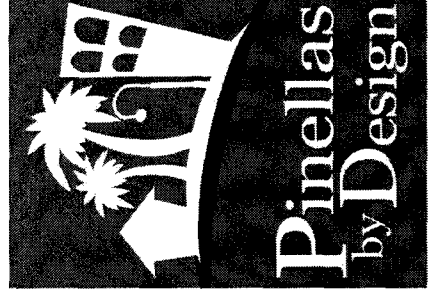
Today's Agenda

- Background
- Project Overview
- Next Steps
- Questions



Background

- *Pinellas by Design: An Economic Development and Redevelopment Plan for the Pinellas Community (EDRP) identified...*
 - Retention/Attraction of High Wage Jobs
 - Retain Industrially-Designated Land
 - Attract 50K High Paying Target Industries Jobs Over 20 Years
- Important Factors in the Pinellas Economy



Project Overview

- Study's Major Elements
 - Target Industry Survey
 - Governmental Actions for Target Industries
 - Criteria To Retain Lands for Targeted Industries
- Project Schedule
 - Project Start September 06
 - Anticipated Completion July 07



Target Industry Survey

- Industry Definitions
- Data Sources
- Survey Instrument
- Mailing/Response Analysis

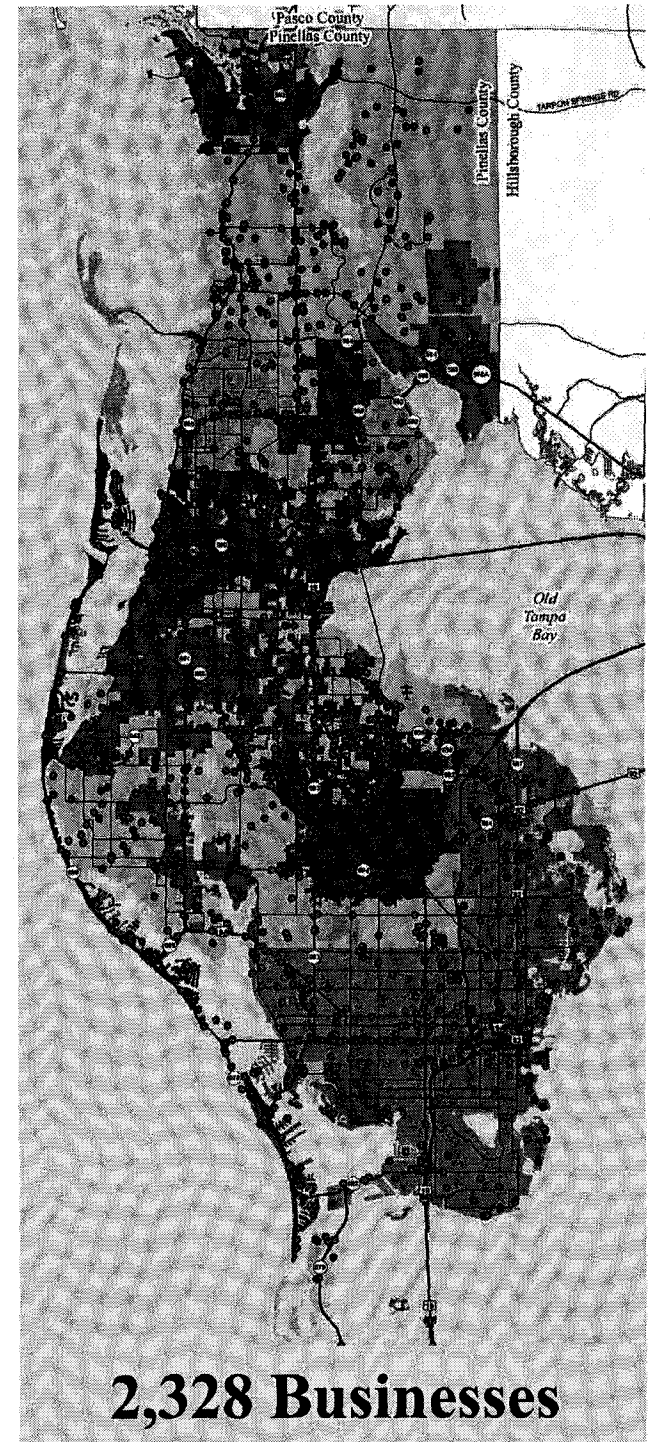


Target Industries are...

*Businesses that export at
least 51% of their annual
sales out of the Pinellas
County economy*

*Industries that pay a higher
than average wage*

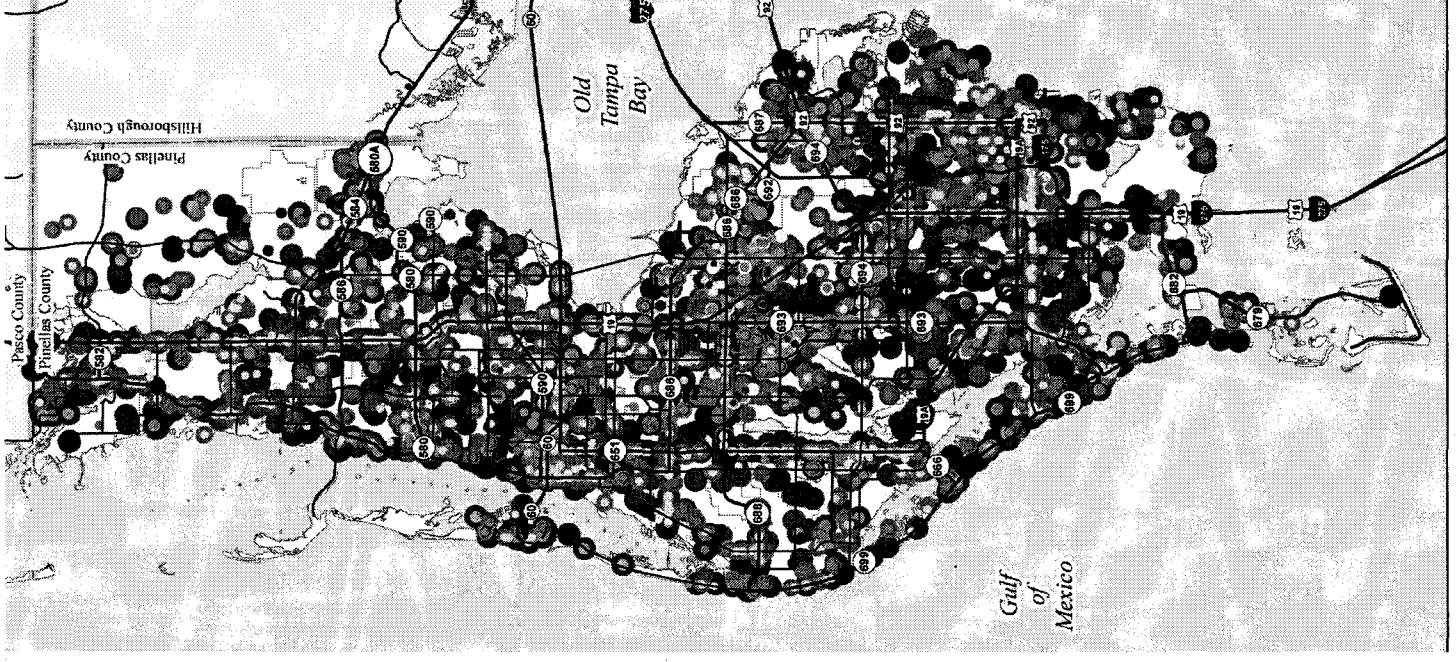
Important Economic Benefit



Pinellas Industry Clusters...

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

*Proposed new clusters



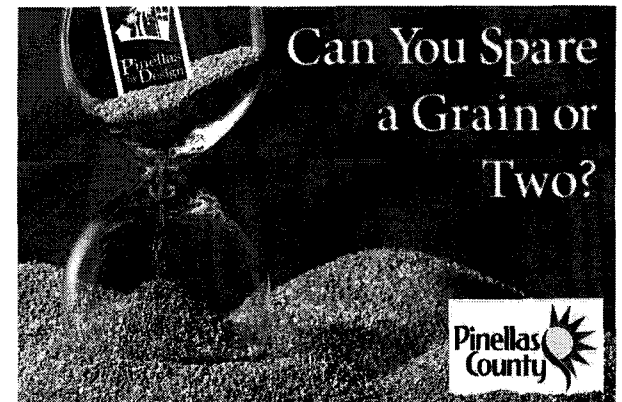
Data Sources

- Quarterly Census of Employment and Wages (ES-202) Data
- Dun and Bradstreet MarketPlace Data
- County Property Appraiser Parcel Data

Created GIS Parcel Linked Dataset

Survey Instrument

- Created by Project Team
 - PCED, PPC, WilsonMiller
 - Planning Advisory Committee Review/Comments
 - 23 Questions
- Survey Mailing
 - Pre-Survey Notice
 - Chairman Duncan's Cover Letter



2,273 Surveys Mailed in January 2007, 2,143 delivered

Survey Response

- 439 Returned Surveys
- 20% Return Rate
- Analysis Included...
 - All Completed Returns
 - Focus on Firms Employing 5 or More



Major Survey Findings

- **General**

- Nearly equal distribution between renters and owners of sites.
- 65% of firms employ 5 to 24 people.
- 76% of firms were founded in Pinellas; percentage is higher for smaller firms.
- 72% of firms are the sole location.



Findings, Cont.

- **Current Site Uses**
 - Office (49%)
 - Manuf./Fab./Prod. (21%)
 - Storage/Distribution (10%)
 - Retail (6%)
- **Site Land Use Needs**
 - 45% Commercial (office, retail)
 - 19% Industrial (manufacturing, warehousing)



Findings, Cont.

- **Site Expansion**

- Would move to previously developed site (62%)
- Would move close to existing site (72%)
- Would consider outside of Pinellas County (25%)
- More space needed in 5 years (50%)



Findings, Cont.

- Quality Factors:
- Percentage Answering "Excellent" or "Good"
 - Airport Access (90%)
 - Highway Access (83%)
 - Proximity to Customers (81%)
 - Proximity to Higher Education / Suppliers (72%)
 - Proximity to Related Businesses (66%)
 - Land/Site Availability and Quality (51%)
 - Availability of Public Transit (48%)
 - Availability of Skilled Labor (45%)
 - Availability of Affordable Housing (26%)
 - Government Regulations/Taxes (23%)
 - Cost of Insurance (9%)



Findings, Cont.

- The “Top 5” Most Important Factors Ranked by Number of Firms
 - Skilled Labor Availability (134)
 - Insurance Costs (95)
 - Government Regulations/Taxes (94)
 - Labor Costs (92)
 - Housing Availability (84)
 - Cost of Sites (84)
 - Proximity to Customers (77)
 - Ability to Expand (60)
 - Workman’s Comp Costs (56)
 - Highway Access (55)

Findings, Cont.

- Problems Affecting Business
 - Better Roads (75%)
 - Protect Commercial Sites (69%)
 - Workforce Housing (63%)
 - Protect Industrial Sites (58%)

Survey Conclusions

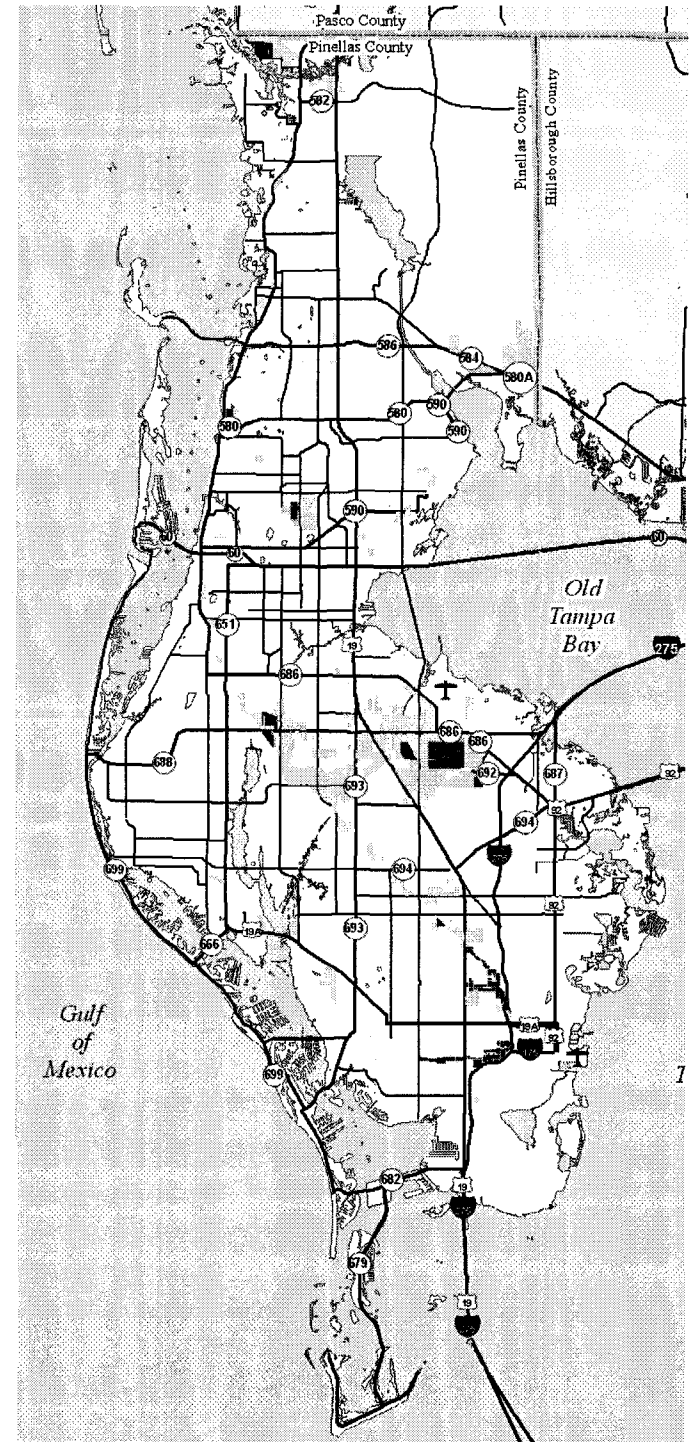
- Substantial Homegrown Environment
- Desire to Remain Localized
- Availability of Suitable Lands
- Quality of Infrastructure

Where do these conditions occur?



Industrial Lands

- Countywide Future Land Use
 - Industrial Limited (6,705 Ac)
 - Industrial General (1,446 Ac)



Highway Adjacency

- Principal Arterial
 - 731 within 0.5 miles
- FDOT Strategic Intermodal System
 - 459 within 0.5 miles

