



Report 2: Target Industry Validation and Update



avalanche

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Introduction

About the Strategy

In March 2018, JAXUSA Partnership, Northeast Florida Regional Council, CareerSource Northeast Florida, and other partners initiated a Regional Economic Development Strategy to improve regional competitiveness and collaboration throughout Baker, Clay, Duval, Flagler, Nassau, Putnam, and St. Johns counties. Avalanche Consulting, a national economic development consultancy, and the Council for Adult and Experiential Learning (CAEL), a national nonprofit focused on lifelong learning, were selected to facilitate the preparation of the economic development and workforce development strategy.

Once complete, Elevate Northeast Florida will have four chapters:

Chapter 1: Economic Assessment & Community Benchmarking

The first chapter of the Elevate Northeast Florida Strategy includes in-depth analysis of the region's current economic and demographic conditions in comparison to national and statewide trends, as well as selected benchmark regions. The first chapter also includes a SWOT Analysis (strengths, weaknesses, opportunities, and threats) based on both quantitative and qualitative information gathered through focus groups, interviews, and an online survey.

Chapter 2: Target Industry Validation & Update

This report, Chapter 2, examines the current status of the region's existing target industries and niche sectors that can be integrated into an updated target list for future economic development efforts. This Target Industry Validation & Update includes written profiles for each target industry, marketing messages, and an industry trend analysis.

Chapter 3: Workforce Development Assessment

The Workforce Skills Assessment will analyze the skill sets of Northeast Florida's workforce and highlight workforce attributes that distinguish Northeast Florida from the competition or need improvement. Chapter 3 will also include an examination of existing educational pathways, current and potential gaps in workforce supply, and opportunities for transitioning workers into higher growth careers.

Chapter 4: Marketing & Strategic Plan

The final chapter of Elevate Northeast Florida will provide marketing and community investment recommendations to help the region be even more competitive globally. Chapter 4 will also include an implementation timeline, estimated budget, and performance metrics that will equip Northeast Florida leaders with the tools it needs successfully implement the Strategy.



Project Partners

The Elevate Northeast Florida Strategy is being developed by JAXUSA Partnership, CareerSource Northeast Florida, and the Northeast Florida Regional Council in partnership with Avalanche Consulting and local residents, public organizations, and private businesses.

JAXUSA Partnership

JAXUSA Partnership is a private, nonprofit division of the JAX Chamber and is Northeast Florida's regional economic development initiative. Its mission is to be a catalyst for economic growth and maximize the region's unique resources to aggressively recruit jobs and private capital investment to the region. JAXUSA coordinates economic development efforts across a seven-county region that includes Baker, Clay, Duval, Flagler, Nassau, Putnam, and St. Johns counties.

Northeast Florida Regional Council (NEFRC)

The Northeast Florida Regional Council (NEFRC) is the regional planning organization for seven Northeast Florida counties (Baker, Clay, Duval, Flagler, Putnam, Nassau and St. Johns) and their 27 municipalities. The mission of the NEFRC is to celebrate the unique assets of Northeast Florida and to engage its people, businesses, governments and organizations. In 2009, NEFRC adopted a Comprehensive Economic Development Strategy (CEDS). Updated in 2012 and 2015, the CEDS buttresses other economic development efforts in the region through identifying programs and projects essential to the region's economic development objectives.

CareerSource Northeast Florida

CareerSource Northeast Florida is a publicly funded agency that provides extensive workforce-related services to six counties on Florida's First Coast – Baker, Clay, Duval, Nassau, Putnam, and St. Johns counties. CareerSource opens the door to improved employment opportunities through education, training, and career services for workers. CareerSource administers an annual budget of more than \$20 million.

Northeast Florida Residents & Businesses

Development of the Elevate Northeast Florida Strategy involved face-to-face discussions with private business leaders, representatives of philanthropic organizations, economic development professionals, and other civic champions. Additionally, more than 1,300 residents and business owners completed an online survey as part of the economic development strategic planning process.

(continued)



Project Partners (continued)

Avalanche Consulting, Inc.

Avalanche Consulting is the nation's premier economic development strategist. Avalanche is deeply driven to make a positive impact and seek clients who are equally inspired to energize their economies. Headquartered in Austin, Avalanche was established in 2005 and its team has a combined 80+ years of experience working with more than 150 cities, counties, and regions across the country.

Council for Adult and Experiential Learning (CAEL)

CAEL is a national, non-profit organization whose mission is to put meaningful learning, credentials and work within reach for every community. CAEL works to remove policy and organizational barriers to learning opportunities, identifies and disseminates effective practices, and delivers value-added services. Since its founding in 1974, CAEL has been providing colleges and universities, companies, economic development organizations, labor organizations and state and local governments with the tools and strategies they need for creating practical, effective lifelong learning solutions to address long term skills needs.



Steering Committee Members

The Elevate project partners and consulting team sincerely thank the members of Elevate Northeast Florida's Strategy Committee for helping inform and guide the development of this strategic plan. Members include:

Tony Allegretti, *Cultural Council of Greater Jacksonville*
 Katrina Austin, *Flagler County DEO*
 Dr. Perry Bechtel, *Mayo Clinic*
 Brian Bergen, *Putnam County EDC*
 The Honorable Aaron Bowman, *City of Jacksonville*
 Michelle Braun, *United Way of Northeast Florida*
 Debbie Buckland, *BB&T*
 Carolyn Clark, *Urban Land Institute*
 Josh Cockrell, *Infinity Global Solutions*
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 Jana Kooi, *Florida State College at Jacksonville*
 Dr. Anna Lebesch, *Steering Committee Co-Chair, St. Johns River State College*
 Eric Mann, *First Coast YMCA*
 Phyllis Martin, *United Way of Northeast Florida*
 Trina Medarev, *World Affairs Council*
 Jeanne Miller, *Jacksonville Civic Council*
 Sherri Mitchell, *Nassau County EDB*
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About this Report

This Target Industry Validation and Update Report includes recommended target industries of opportunity, profiles of each of these industries, and an analysis of Northeast Florida's current industry and occupation trends. The profiles are intended to educate Northeast Florida leaders, businesses, and residents about each industry, their niche sector opportunities, the business and workforce factors that influence their growth, and marketing messages based on local strengths.

Targeting specific industries is a critical way to approach economic development. No community can be all things to all businesses and people. To make the best use of economic, workforce, and community development investments, Northeast Florida must focus on those industries that present the greatest opportunities and that support community goals.

Identifying target industries is an iterative process – looking at a community's existing industry base, assets that support growth, and local values and goals. Target industries represent a mix of opportunities for growth – including expanding and retaining strong existing industries while identifying industries with high growth potential through entrepreneurial activity and new business attraction. Conversations with regional stakeholders through the planning process combined with extensive data analysis and the consultants' national perspective have helped identify a range of diverse opportunities for Northeast Florida.

This report contains three sections:

Target Industry Recommendations

This report begins with a description of how target industries were identified for Northeast Florida and a summary of the recommended target industries and their niche sectors.

Target Industry Profiles

Next, this report contains profiles of each target industry. Profiles include an overview of the industry, descriptions of their niche sectors, a discussion of the industry's top workforce needs, and a summary of sales messages featuring the region's competitive offerings.

Industry Analysis

This report concludes with an analysis of recent and projected industry trends in Northeast Florida. This section looks at the size, growth, and relative concentration of major industries and occupations in Northeast Florida.

Ideas from Benchmark Regions

This report concludes with highlights from an examination of benchmark regions' target industry marketing activities.

