



Economic Development Strategic Plan - RCM2342AS

Task 3 Report

prepared for:

**City of Cape Coral Office of Economic and
Business Development.**

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Task 3: Cluster, Location Quotient, Target Industry and Operational Analysis

3.a – Cape Coral Preliminary Target Industry Evaluation

Target Industry Research

In this section, the potential for economic advancement for the City of Cape Coral is evaluated by examination of the targeted industries for the area. The methodology for this analysis is the Location Quotients (LQ) tabular and charting technique. In this method, industry employment is plotted for the projected 2022-2030 period using Lee County and the State of Florida Long-Term Industry Employment projections¹.

Increases in employment are generally considered as the truest indicator of business growth, revenue gains and profitability. The analysis forecasts those industries that are present in Cape Coral and that demonstrate growth opportunity or are of such legacy value that continuing efforts for sustainability are paramount.

Location Quotients (LQ) Analysis

What is an LQ and How is it Used?

Location Quotients (LQ's) are developed by comparing the local employment concentration by industry against a larger sample, in this case the State of Florida. By example, if an industry has a local employment of 150 which might represent 5% of total the local labor market and the same industry for Florida has a 7% share of the State's total, the LQ for this industry is produced through the quotient of 5% divided by 7%, or, an LQ of 0.71.

The goal of the LQ analyses is to identify local industries that are performing at higher levels of employment concentration than their state counterparts, thereby indicating that these industries have a more important role locally than regionally. Locally strong industries are more easily promoted and reinforced by economic development initiatives and help to identify the locality's

¹ Florida Commerce Employment Projections, 203-202230; <https://www.floridajobs.org/workforce-statistics/data-center/statistical-programs/employment-projections>

unique characteristics. Thus, an industry of LQ greater than 1.0 (parity with State levels) reveals an indication that this industry should be considered as locally relevant.

Economists consider industries with LQ's above 1.0 as those with export capability—the industry is producing more than is consumed locally. For industries at LQ of 1.0, demand is being met. And for industries below 1.0 LQ, industries of import demand – i.e., producing less than is consumed locally.

Another important element of this method is the change of LQ's over the evaluation period. Positive annual percentage gain in LQ reinforces the industry's importance; loss indicates a decline in performance. Finally, the actual number of projected employment is a key feature that when combined with the LQ time change, provides a measure of “gravity”, i.e., the **LQ Impact (LQI)** factor.

How Are Industries Represented?

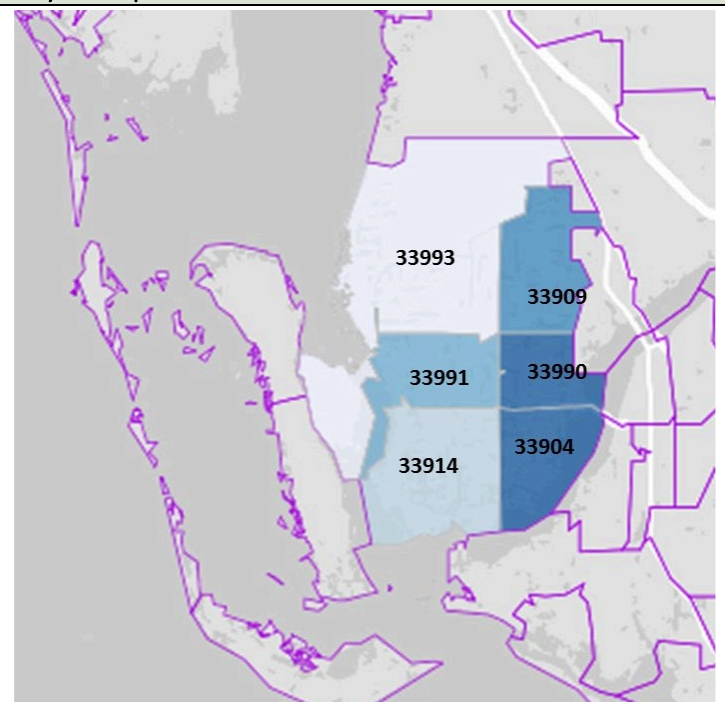
Industries are organized under the North American Industrial Classification System (NAICS) hierarchy. Most data is drawn from the US Census Bureau's Zip Code Business Patterns for private non-farm employment and number of establishments. Zip Code Tabulation Area (ZCTA) data is used for the six ZCTAs that comprise Cape Coral (refer to Exhibit 3.1 right):

The ZCTSS for Cape Coral are as follows:

- 33904
- 33909
- 33914
- 33990
- 33991
- 33993

Added to the private non-farm data from the US Census is an estimate of current

Exhibit 3.1 – Zip Code Tabulation Areas comprising the City of Cape Coral



Source: US Census Bureau

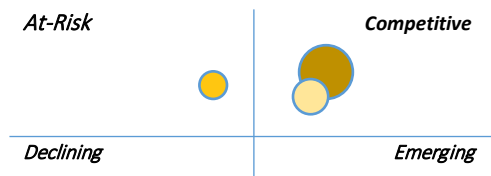
and projected agricultural, mining, utilities, and public administration employment provided by a commercial data provider (ESRI) in their Business Analyst application².

Employment data in NAICS is segmented into 20 super-sectors containing 79 three-digit sub-components, which represent more detailed refinements of the original 20 categories. NAICS provides industry detail down to the six-digit level covering over 800 individual industry titles. However, for purposes of this study, the three-digit level of detail is utilized. In order to streamline some of the NAICS categories, the following major grouping of **14** industries has been created of which all subsequent industry analyses is organized:

- | | |
|---|------------------------------------|
| • Agriculture, Forestry, Fishing & Hunting | • Other Services |
| • Construction | • Professional & Business Services |
| • Education, Healthcare & Social Assistance | • Public Administration |
| • Financial Activities | • Retail Trade |
| • Information | • Tourism & Leisure |
| • Mining & Utilities | • Transportation & Warehousing |
| • Manufacturing | • Wholesale Trade |

The LQ Chart

The LQ chart is an important resource as industries can be graphically represented in four quadrants. Year 2030 estimated employment by industry is shown as “bubbles”; the LQ change in the 2022-2030 period is the “X” axis; and the projected 2030 LQ is the “Y” axis. The X axis crosses the

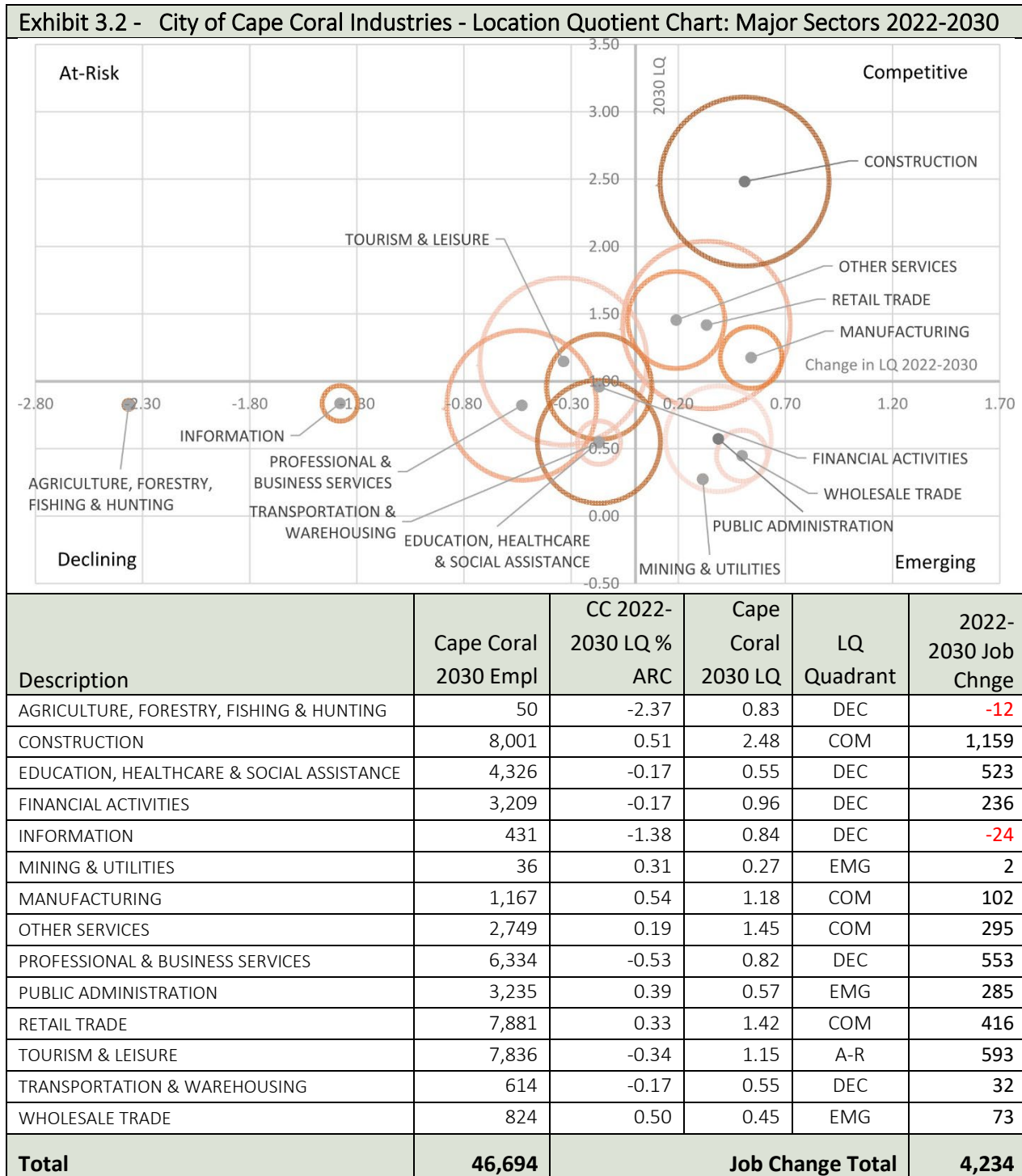


Y axis at the value of 1.0, thereby plotting the results for either success in exceeding Florida state parity or failing to meet this criterion. Each quadrant is labeled as follows: Competitive – dominant industries in the Region; Emerging – emerging industries not yet achieving critical mass; At-Risk – formerly strong industries (legacy) that are losing power and influence; or, Declining – industries that may be in danger of non-sustainability in the Region. The location of the employment “bubbles” on the chart demonstrates the industries’ role for the local economy.

As shown in the Exhibit 3.2 (below) and accompanying industry detail charts (Task 3 Appendices), each of the NAICS major sectors is provided with its projected 2030 employment, the annual rate of employment growth from 2022 to 2030, the 2030 LQ, the LQ charted quadrant, and the number of anticipated jobs gained or lost in the 2022-2030 period. For each chart and associated table, the group heading is highlighted in the data and shown as a colored ring instead of a bubble on the

² ESRI – Business Analyst; Cape Coral, Florida, 2023

graphic. Ring positions reveal the performance of the component industries and allow for a clear understanding of the interplay of dynamic economic factors for the City of Cape Coral.



Overall, employment in Cape Coral is expected to rise by **4,234** jobs from the 2022 figure of **43,460** jobs. The new figure of **46,494** jobs by 2030 is compiled through state and national projections for Florida, Lee County and calculated for Cape Coral based on projections of the 2021 US Census Zip Code Business Patterns.³ The top five industry sectors account for **74%** of new employment, and **77%** of all new job gains. Construction employment represents the single largest employment category in the City of Cape Coral with a growth of **1,159** jobs forecasted by yr. 2030. Retail Trade and Tourism, & Leisure follow, with **416** and **593** new jobs expected, respectively. Professional & Business Services comes next, with **553** jobs forecasted. Finally, Education, Healthcare & Social Assistance rounds out the top five with **523** new jobs expected, as shown in the table below:

Industry Sector	Yr. 2030 empl.	Yr. 2030 empl. Rank	Yr. 2022- 2030 Job Change.
Construction	8,001	1	1,159
Retail Trade	7,881	2	416
Tourism & Leisure	7,836	3	593
Professional & Business Services	6,334	4	553
Education, Healthcare & Social Assistance	4,326	5	523
Public Administration	3,235	6	285
Financial Activities	3,209	7	236
Other Services	2,749	8	295
Manufacturing	1,167	9	102
Wholesale Trade	824	10	73
Transportation & Warehousing	614	11	32
Information	431	12	-24
Agriculture, Forestry, Fishing & Hunting	50	13	-12
Mining & Utilities	36	14	2
Totals	46,694		4,234
Top 5 Industries total	34,378		3,244
Top 5 Industries share	74%		77%

³ UC Census Zip Code Business Patterns; ZCTAs 33904,33909, 33990, 33991, 33993;
<https://data.census.gov/table/CBP2021.CB2100CBP?q=cbp&g=860XX00US33904,33909,33914,33990,33991,33993&n=N0300.00>

Location Quotient Impact Factors (LQI)

Industries with large employment concentration and large LQ change produce the highest impacts and are of the most importance, both positively and negatively. Use of the LQ Impact factor (LQI) is helpful in determining the range of economic impacts. The LQI could be imagined as a ball on a string being spun in a circle. A smaller and lighter ball on a long string could equal the similar amount of force as a heavier ball on a shorter string. However, the ideal condition would be produced by a heavy ball on a long string.

When industries exhibit large LQI's, they have significant economic effects which must be considered when selecting target industries. Often, a legacy industry that is exhibiting a downward trend is critical to the local economy and negative changes in Location Quotients indicate that the industry may be losing market share or have employment issues. For economic development agencies, the focus of often limited marketing, promotion, or incentive resources may be dependent on choosing between an obvious growth industry or a legacy industry in need of assistance. Relative positions and size of employment bubbles in the chart indicate the LQI's. A formula has been produced to describe these LQ impacts:

$$LQI = (2030 \text{ Projected Employment} \times 2022\text{-}2030 \text{ LQ Annual Rate of Change \%} \times \sqrt{2030LQ}) / 100$$

Exhibit 3.3 at the end of this section illustrates Cape Coral's Industries Location Quotients for the 2022-2030 projected period. LQI's for the two-digit sectors range from a high of **53.8** for Construction to a low of **-28.3** for Professional & Business Services. In recognition that both the stronger performers as well as those that require the most attention, a two-tiered target industries approach has been developed.

Tier 1 targets are those whose LQI are above the median for all positive industries, or a **1.22** LQI. The remaining industries from 0 to 1.22 LQI are important to Cape Coral but will be withheld from this part of the analysis.

Tier 2 industries are all in the negative column and fall below the median value of **-2.29** LQI. These are sectors that represent underperformance that will need to be addressed as soon as possible to avoid further deterioration. The table below indicates the distribution of the total **24** Tier 1 and Tier 2 targets:

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Major Sector	Tier 1 Targets	Tier 2 Targets	Total
RETAIL TRADE	6	1	7
FINANCIAL ACTIVITIES	1	2	3
EDUCATION, HEALTHCARE & SOCIAL ASSISTANCE	1	2	3
MANUFACTURING	2		2
INFORMATION	1	1	2
PROFESSIONAL & BUSINESS SERVICES		2	2
OTHER SERVICES	1	1	2
CONSTRUCTION	1		1
WHOLESALE TRADE	1		1
PUBLIC ADMINISTRATION	1		1
Total	15	9	24

While these target industries have been deduced from the 3-digit NAICS structure, more detail is still necessary to formulate the approach to finalize the target industry process. Total employment is estimated at nearly **46,694** persons in the next eight years which equates to a growth rate of nearly **530** positions per year.

In the next section, Identification of Unmet Opportunities, we will examine the four-digit industries contained within these preliminary targets to arrive at a higher employment objective and the formulation of strategic industry clusters.

Summary of Preliminary Targets

Retail Trade

- Motor Vehicle & Parts Dealers (*LQI:4.12, Competitive, Tier 1*)
- Food & Beverage Stores (*LQI:5.04, Competitive, Tier 1*)
- Furniture, Home Furnishings, Electronics, and Appliance Retailers (*LQI:3.63, Competitive, Tier 1*)
- Gasoline Stations (*LQI:-7.27, At-Risk, Tier 2*)
- Clothing & Clothing Accessories Stores (*LQI:1.51, Competitive, Tier 1*)
- Sporting Goods, Hobby, Musical Instrument, & Book Stores (*LQI:27.85, Competitive, Tier 1*)

Financial Activities

- Credit Intermediation and Related Activities (*LQI:-5.66, Declining, Tier 2*)
- Securities, Commodity Contracts, and Other Financial Investments and Related Activities (*LQI:1.35, Emerging, Tier 1*)
- Real Estate (*LQI:-3.57, At-Risk, Tier 2*)
- Rental and Leasing Services (*LQI:2.54, Competitive, Tier 1*)

Education, Healthcare & Social Assistance

- Ambulatory Health Care Services (*LQI:-3.6, Declining, Tier 2*)
- Hospitals (*LQI:-4.48, Declining, Tier 2*)
- Social Assistance (*LQI:5.03, Emerging, Tier 1*)

Manufacturing

- Printing & Related Support Activities (*LQI:8.36, Competitive, Tier 1*)
- Fabricated Metal Products Mfg. (*LQI:2.74, Competitive, Tier 1*)

Information

- Publishing Industries (except Internet) (*LQI:1.28, Emerging, Tier 1*)
- Telecommunications (*LQI:-5.55, At-Risk, Tier 2*)

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Professional & Business Services

- Professional, Scientific, & Technical Services (*LQI:-13.29, Declining, Tier 2*)
- Administrative and Support Services (*LQI:-15.17, Declining, Tier 2*)

Tourism & Leisure

- Food Services & Drinking Places (*LQI:-31.65, At-Risk, Tier 2*)

Other Services

- Repair and Maintenance (*LQI:4.87, Competitive, Tier 1*)

Construction

- Specialty Trade Contractors (*LQI:57.58, Competitive, Tier 1*)

Wholesale Trade

- Merchant Wholesalers, Durable Goods (*LQI:2.24, Emerging, Tier 1*)

Public Administration

Government (*LQI:8.5, Emerging, Tier 1*)

Exhibit 3.3 – Tier 1 and Tier 2 Targets by LQI									
NAICS	Description	CC 2030 Empl	CC 2022- 2030 LQ Chg ARC	CC 2030 LQ	LQ Quad.	2022- 2030 Job Gains	CC LQI factor	Tier 1 Targets	Tier 2 Targets
AGRICULTURE, FORESTRY, FISHING & HUNTING									
115	Support Activities for Agriculture and Forestry	50	-2.37	0.83	DEC	-12	-1.47		
MINING & UTILITIES									
212	Mining (except Oil and Gas)	16	0.87	0.96	EMG	2	0.11		
221	Utilities	21	-0.07	0.18	DEC	1	-0.01		
CONSTRUCTION									
236	Construction of Buildings	1,649	-0.08	2.60	A-R	120	-1.90		
237	Heavy and Civil Engineering Construction	442	0.00	1.08	COM	45	0.02		
238	Specialty Trade Contractors	5,910	0.73	2.71	COM	994	57.58	■	
MANUFACTURING									
323	Printing & Related Support Activities	281	1.76	3.96	COM	25	8.36	■	
332	Fabricated Metal Prdct. Mfg.	295	1.00	1.31	COM	47	2.74	■	
333	Machinery Mfg.	252	0.15	1.49	COM	25	0.41		
336	Transp. Equip. Mfg.	90	-1.05	0.32	DEC	2	-0.54		
337	Furniture & Related Prdct. Mfg.	17	0.59	0.24	EMG	1	0.05		
339	Misc. Mfg.	232	-0.33	1.32	A-R	2	-0.89		
WHOLESALE TRADE									
423	Merchant Wholesalers, Durable Goods	498	0.73	0.50	EMG	49	2.24	■	
424	Merchant Wholesalers, Nondurable Goods	271	0.19	0.38	EMG	19	0.29		
425	Wholesale Electronic Markets and Agents and Brokers	55	0.61	0.44	EMG	5	0.20		
RETAIL TRADE									
441	Motor Vehicle & Parts Dealers	899	0.48	1.13	COM	85	4.12	■	
444	Building Material & Garden Equipment & Supplies Dealers	668	-0.22	1.34	A-R	31	-1.65		
445	Food & Beverage Stores	1,964	0.22	1.59	COM	139	5.04	■	

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449	Furniture, Home Furnishings, Electronics, and Appliance Retailers	639	0.44	1.87	COM	19	3.63	■	
455	General merchandise stores	699	0.09	0.67	EMG	28	0.50		
456	Health & Personal Care Stores	499	-0.07	1.28	A-R	0	-0.39		
457	Gasoline Stations	492	-0.88	2.28	A-R	-35	-7.27		□
458	Clothing & Clothing Accessories Stores	441	0.35	1.05	COM	8	1.51	■	
459	Sporting Goods, Hobby, Musical Instrument, & Book Stores	1,580	1.28	2.54	COM	141	27.85	■	
TRANSPORTATION & WAREHOUSING									
484	Truck Transportation	230	-0.27	0.65	DEC	10	-0.48		
485	Transit & Ground Passenger Transport.	75	0.95	1.12	COM	10	0.63		
487	Scenic & Sightseeing Transport.	77	-0.54	4.94	A-R	2	-0.92		
488	Support Activities for Transport.	204	-0.23	0.60	DEC	8	-0.35		
492	Couriers & Messengers	28	-0.63	0.08	DEC	2	-0.05		
INFORMATION									
511	Publishing Industries (except Internet)	124	1.29	0.77	EMG	5	1.28	■	
517	Telecommunications	281	-1.55	1.19	A-R	-28	-5.55		□
519	Other Information Services	26	-11.22	0.22	DEC	-1	-2.29		
FINANCIAL ACTIVITIES									
522	Credit Intermediation and Related Activities	650	-0.91	0.75	DEC	-47	-5.66		□
523	Securities, Commodity Contracts, and Other Financial Investments and Related Activities	219	0.79	0.76	EMG	16	1.35	■	
524	Insurance Carriers and Related Activities	482	-0.15	0.46	DEC	28	-0.45		
531	Real Estate	1,553	-0.19	1.74	A-R	165	-3.57		□
532	Rental and Leasing Services	305	1.03	1.25	COM	74	2.54	■	
PROFESSIONAL & BUSINESS SERVICES									
541	Professional, Scientific, & Tech'l Services	3,595	-0.44	0.90	DEC	478	-13.29		□

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561	Administrative and Support Services	2,709	-0.64	0.76	DEC	72	-15.17		□
EDUCATION, HEALTHCARE & SOCIAL ASSISTANCE									
611	Educational Services	351	0.07	0.32	EMG	45	0.12		
621	Ambulatory Health Care Services	2,301	-0.21	0.73	DEC	273	-3.60		□
622	Hospitals	381	-2.24	0.21	DEC	-19	-4.48		□
623	Nursing & Resid'l Care Facilities	595	0.15	0.63	EMG	86	0.60		
TOURISM & LEISURE									
711	Performing Arts, Spectator Sports, & Related Industries	81	0.09	0.37	EMG	12	0.04		
712	Museums, Historical Sites, & Similar Institutions	159	0.53	3.30	COM	34	1.17		
713	Amusement, Gambling, & Recreation Industries	465	-0.18	0.46	DEC	30	-0.54		
721	Accommodation	164	0.62	0.16	EMG	32	0.32		
722	Food Services & Drinking Places	6,967	-0.39	1.55	A-R	485	-31.65		□
OTHER SERVICES									
811	Repair and Maintenance	1,036	0.38	2.10	COM	134	4.87	■	
812	Personal and Laundry Services	980	0.03	1.77	COM	109	0.31		
813	Religious, Grantmaking, Civic, Professional, and Similar Organizations	733	0.15	0.87	EMG	52	0.95		
PUBLIC ADMINISTRATION									
900	Government	3,235	0.39	0.57	EMG	285	8.50	■	
Total		46,694				4,234			
Tier 1 Targets Median								1.22	
Tier 2 Targets Median									-2.29
Number of Tier 1 Targets								15	
Number of Tier 2 Targets									9

3.b – Identification of Unmet Opportunities

What Industries are We Missing?

In this section, the unmet potential of the City of Cape Coral is identified. The preceding Location Quotient review of existing industries analyzed business performance by employment as measured against the State of Florida in the industries currently present in Cape Coral. But what industries are not present locally?

The 15 Tier 1 and the 9 Tier 2 preliminary targets developed in Task 3.a have been identified by use of the 3-digit NAICS hierarchy. Under each of these headings are 4-, 5- and 6-digit sub-sector industries that have 2022 employment data from the US Census for the Cape Coral ZCTAs, but without any forward-looking projections. In this section, we will examine those 4-digit industries and evaluate:

1. Whether they have a LQ of 1.0 (parity with Florida) or better.
2. What level of employment should be targeted to at least bring them to the 1.0 parity.
3. Whether missing industries should be considered for targeting for the City and at what targeted employment size.

In the following pages, we examine each Major Sector grouping and their associated preliminary targets:

Retail Trade

Motor Vehicle & Parts Dealers – Competitive, Tier 1

Under the 3-Digit NAICS heading of Motor Vehicle & Parts Dealers (441), there are three 4-digit industry classifications, each of which are present in Cape Coral:

- ❖ Automobile Dealers (4411)
- ❖ Other Motor Vehicle Dealers (4412)
- ❖ Automotive Parts, Accessories, & Tire Stores (4413)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
4411	Automobile Dealers	202	0.35	1.0	574	372	24	15
4412	Other Motor Vehicle Dealers	186	1.59	--	--	--	10	--
4413	Automotive Parts, Accessories, & Tire Stores	426	1.88	--	--	--	8	--

Automobile Dealers

The Automobile Dealers category has an LQ of .35 and with the 2022 employment figure of 202 persons. To meet the 1.0 LQ threshold, we would like to see an increase in 372 jobs or about 15 new establishments. Typical activities include:

- Antique auto dealers
- Light utility truck dealers, new & used
- New car dealers
- Used car dealers

Other Motor Vehicle Dealers

The Other Motor Vehicle Dealers category has a yr. 2022 of LQ above the 1.0 parity level and does not need support. Recruitment and attraction of companies in this area should continue to be encouraged, with a company size averaging about 10 persons. Typical retail types include:

- Aircraft dealers
- All-terrain vehicle (ATV) dealers
- Boat dealers, new and used
- Camper dealers
- Camper parts and accessories stores
- Golf cart dealers, powered
- Marine supply dealers
- Motorcycle dealers
- Motorcycle parts & accessories dealers
- Personal watercraft dealers
- Recreational vehicle (RV) dealers
- Utility trailer dealers

Automotive Parts, Accessories, & Tire Stores

The Automotive Parts, Accessories, & Tire Stores category has a yr. 2022 of LQ above the 1.0 parity level and does not need support. Recruitment and attraction of companies in this area should continue to be encouraged, with a company size averaging about 8 persons. Typical retail types include:

- Auto supply stores
- Automobile parts dealers
- Batteries, automotive, dealers
- Tire dealers, automotive
- Used automotive parts stores
- Used tire dealers

- Stereo stores, automotive

Food & Beverage Stores - Competitive, Tier 1

Under the Food & Beverage Stores (445) heading, there are three 4-digit industry classifications, each of which is present in Cape Coral:

- ❖ Grocery Stores (4451)
- ❖ Specialty Food Stores (4452)
- ❖ Beer, Wine, & Liquor Stores (4453)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	Fl. Avg. Size of Estbl.	Net Estb. Gain
4451	Grocery Stores	1,646	1.24	--	--	--	31	--
4452	Specialty Food Stores	85	0.93	1.0	91	6	7	1
4453	Beer, Wine, and Liquor Stores	94	1.64	--	--	--	6	--

Grocery Stores

The Grocery Stores category has a yr. 2022 of LQ above the 1.0 parity level and does not need support. Recruitment and attraction of companies in this area should continue to be encouraged, with a company size averaging about **31** persons. Typical retail types include:

- Commissaries, primarily groceries
- Convenience food stores (except those with fuel pumps)
- Delicatessens primarily retailing a range of grocery items and meats
- Grocery stores
- Supermarkets
- Vending machine merchandisers

Specialty Food Stores

The Specialty Food Stores category has an LQ of **.93** and with the 2022 employment figure of **85** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **6** jobs in the Specialty Food Stores category, or about **1** new company. As part of Specialty Food Retailers, the following industries should be considered:

- Fruit & Vegetable Retailers
- Meat Retailers
- Baked Goods Retailers
- Confectionery & Nut Retailers

- Fish & Seafood Retailers
- All Other Specialty Food Retailers

Beer, Wine, and Liquor Stores

The Beer, Wine, and Liquor Stores category has a yr. 2022 of LQ above the 1.0 parity level and does not need support. Recruitment and attraction of companies in this area should continue to be encouraged, with a company size averaging about 6 persons. Typical retail types include:

- Beer stores
- Liquor stores
- Duty free liquor shops
- Wine shops

Furniture, Home Furnishings, Electronics, & Appliance Retailers -- Competitive, Tier 1

Under the 3-Digit NAICS heading of Furniture, Home Furnishings, Electronics, & Appliance Retailers (449), there are two 4-digit industry classifications, each of which is present in Cape Coral:

- ❖ Furniture & Home Furnishings Retailers (4491)
- ❖ Electronics and Appliance Retailers (4492)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	Fl. Avg. Size of Estbl.	Net Estb. Gain
4491	Furniture and Home Furnishings Retailers	412	1.90	--	--	--	9	--
4492	Electronics & Appliance Retailers	208	1.02	--	--	--	9	--

Furniture & Home Furnishings Retailers

The Furniture & Home Furnishings Retailers category has a yr. 2022 of LQ above the 1.0 parity level and does not need support. Recruitment and attraction of companies in this area should continue to be encouraged, with a company size averaging about 9 persons. Typical retail types include:

- Furniture
- Other home furnishings
- Floor coverings
- Window treatments

Electronics & Appliance Retailers

The Electronics & Appliance Retailers category has a yr. 2022 of LQ above the 1.0 parity level and does not need support. Recruitment and attraction of companies in this area should continue to be encouraged, with a company size averaging about 9 persons. Typical retail types include:

- Audio equipment stores (except automotive)
- Camera shops, photographic
- Cellular telephone accessories stores
- Computer equipment stores
- Household-type appliance stores
- Music stores
- Photographic supply stores
- Sewing machine stores, household-type
- Software stores, computer
- Stereo stores (except automotive)
- Vacuum cleaner stores, household-type
- Video game software stores

Gasoline Stations – At-Risk, Tier 2

Under the Gasoline Stations (457) heading, there are two 4-digit industry classifications, one of which is present in Cape Coral:

- ❖ Gasoline Stations (4571)
- ❖ Fuel Dealers (4572)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL Avg. Size of Estbl.	Net Estb. Gain
4571	Gasoline Stations	527	1.96	--	--	--	7	--
4572	Fuel Dealers	??	??	1.0	11	11	9	1

Gasoline Stations

The Gasoline Stations category has a yr. 2022 LQ above 1.0 and does not require our focus. Average establishment size for this category is about 7 persons, with the following included:

- Gasoline stations with convenience stores
- Gasoline stations without convenience stores
- Marine service stations
- Truck stops

However, with the trend toward larger, more convenience retail-integrated gasoline stations offering electric charging stations, dining, and rest areas, this category should be a “driver” for the growing northeast and northwest areas of Cape Coral. Deeper examination of the NAICS data for gasoline stations also reveals Marine service stations as a key category for Cape Coral necessary for the large recreational boating economy.



Fuel dealers

The Fuel dealers group has no measurable employment and could be considered as “missing”. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **11** jobs or about **1** new firm. Typical establishment size is **9** persons and the type of these store in the category are as follows:

- Biodiesel
- Hydrogen
- Other emerging fuels
- Propane

Clothing & Clothing Accessories Stores – Competitive, Tier 1

Under the 3-Digit NAICS heading of Clothing & Clothing Accessories Stores (458), there are three 4-digit industry classifications, two of which are present in Cape Coral:

- ❖ Clothing Stores (4581)
- ❖ Shoe Retailers (4582)
- ❖ Jewelry, Luggage, & Leather Goods Stores (4583)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL Avg. Size of Estbl.	Net Estb. Gain
4581	Clothing Stores	315	0.80	1.0	395	80	9	9
4582	Shoe Retailers	??	??	1.0	70	70	11	6
4583	Jewelry, Luggage, & Leather Goods Stores	118	1.82	--	--	--	5	--

Clothing stores

The Clothing stores category has an LQ of **.80** and with the 2022 employment figure of **315**. To meet the 1.0 LQ threshold, we would like to see an increase in **80** jobs in this category, or about **9** new establishments.

- Apparel accessories
- Children's & infants' clothing
- men's & boys' clothing
- women's & girls' clothing
- Bridal gown shops (except custom)
- Costume stores (including theatrical)
- Furriers
- Handbags
- Hat and cap stores
- Leather coats
- Lingerie
- Maternity shops
- School uniform stores
- Sports apparel
- Swimwear
- T-shirt shops
- Uniform stores (except athletic)
- Unisex clothing stores

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- Hosiery
- Jewelry stores, costume
- Western wear stores
- Wig and hairpiece stores

Shoe Retailers

The Shoe Retailers group has no measurable employment and could be considered as “missing”. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **70** jobs or about **6** new firms. Typical establishment size is **11** persons and the type of these store in the category are as follows:

- Athletic shoes (except bowling, golf, cleated)
- Children’s shoes
- Orthopedic shoes

Jewelry, Luggage, & Leather Goods Stores

The Jewelry, Luggage, & Leather Goods Stores category has a yr. 2022 LQ above 1.0 and does not require our focus. Average establishment size for this category is about **5** persons, with the following included:

- Jewelry stores, precious
- Leather Goods Stores
- Luggage stores
- Watch shops

Sporting Goods, Hobby, Musical Instrument, & Book Stores -- Competitive, Tier 1

Under the 3-Digit NAICS heading of Sporting Goods, Hobby, Musical Instrument, & Book Stores (459), there are six 4-digit industry classifications, three of which are present in Cape Coral:

- ❖ Sporting Goods, Hobby, and Musical Instrument Retailers (4591)
- ❖ Book Retailers and News Dealers (4592)
- ❖ Florists (4594)
- ❖ Office Supplies, Stationery, and Gift Retailers (4594)
- ❖ Used Merchandise Retailers (4595)
- ❖ Other Miscellaneous Retailers (4599)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL Avg. Size of Estbl.	Net Estb. Gain
4591	Sporting Goods, Hobby, & Musical Instrument Retailers	??	??	1.0	147	??	9	17
4592	Book Retailers & News Dealers	??	??	1.0	19	??	8	2
4593	Florists	??	??	1.0	18	??	5	4

4594	Office Supplies, Stationery, & Gift Retailers	191	2.14	--	--	--	8	--
4595	Used Merchandise Stores	87	0.40	1.0	221	134	8	17
4599	Other Miscellaneous Store Retailers	1,161	5.28	--	--	--	5	--

Sporting Goods, Hobby, & Musical Instrument Retailers

The Sporting Goods, Hobby, & Musical Instrument Retailers group has no reported employment and could be considered as “missing”. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **147** jobs in the category, or about **17** new firms. Typical establishment size is **9** persons and the type of these store in the category are as follows:

- Sporting goods retailers
- Hobby, Toy, and Game retailers
- Sewing, needlework, & piece goods
- Musical instrument and supplies retailers

Book Retailers & News Dealers

The Book Retailers and News Dealers group has no reported employment and could be considered as “missing”. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **19** jobs in the category, or about **2** new firms. Typical establishment size is **8** persons and the type of these store in the category are as follows:

- Book stores
- Comic bookstores
- News stands
- Religious bookstores

Florists

Florists may be considered as “missing” despite observable conditions that contradict their absence from the City. To meet the 1.0 LQ threshold, we would like to see the expansion of the industry by **18** jobs in the category, or about **4** new firms. Typical establishment size is **5** persons and the type of these store in the category are as follows:

- Flower shops, fresh

Office Supplies, Stationery, and Gift Retailers & Other Miscellaneous Retailers

The Office Supplies, Stationery, and Gift Retailers & Other Miscellaneous Retailers category has a yr. 2022 of LQ above the 1.0 parity level and does not need support. Recruitment and attraction of

companies in this area should continue to be encouraged, with a company size averaging about **8** persons. Typical retail types include:

- Balloon shops
- Card shops, greeting
- Christmas stores
- Collectible gift shops
- Craft (except craft supply) stores
- Curio shops
- Novelty shops
- Office supply stores
- Party goods stores
- School supply stores
- Souvenir shops
- Stationery stores

Used Merchandise Stores

The Used Merchandise Stores industry has an LQ of **.40** and with the 2022 employment figure of **87** persons, could benefit from improved performance. To meet the 1.0 LQ threshold, we would like to see an increase in **134** jobs in the Used merchandise category, or about **17** new establishments.

Some interesting retails segments are contained in the Used merchandise heading, such as:

- Antique dealers (except motor vehicles)
- Architectural salvage dealers
- Auctions, general merchandise (used
- Consignment shops, used merchandise
- Flea markets, permanent
- Furniture stores, used
- Rare manuscript stores
- Record stores, used
- Secondhand merchandise stores
- Sporting goods stores, used
- Thrift shops, used merchandise
- Used rare collectors' items (e.g., autograph, coin, card, stamps) shops

Other Miscellaneous Store Retailers

The Other Miscellaneous Store Retailers category has a yr. 2022 of LQ above the 1.0 parity level and does not need support. Recruitment and attraction of companies in this area should continue to be encouraged, with a company size averaging about **5** persons. Typical retail types include:

- Art Dealers
- Art supply stores
- Batteries, except automotive, dealers
- Beer & wine making supply stores
- Cannabidiol (CBD oil) retailers
- Cemetery memorial dealers
- Cigar stores
- Closet organizer stores
- Collectors' items
- Emergency preparedness supply stores
- Fireworks shops
- Home security equipment stores
- Hot tub stores
- Janitorial equipment & supplies stores
- Manufactured (Mobile) Home Dealers
- Marijuana stores, medical
- Pet & Pet Supplies Retailers
- Swimming pool supply stores
- Trophy (shops
- Vape shops

Financial activities

Credit Intermediation & Related Activities -- Declining, Tier 2

Under the 3-Digit NAICS heading of Credit Intermediation and Related Activities (522), there are three 4-digit industry classifications, each of which are present in Cape Coral:

- ❖ Depository credit intermediation (5221)
- ❖ Nondepository credit intermediation (5222)
- ❖ Activities related to credit intermediation (5223)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
5221	Depository credit intermediation	324	0.30	1.0	1,083	759	18	42
5222	Nondepository credit intermediation	172	0.74	1.0	234	62	10	6
5223	Activities related to credit intermediation	201	0.86	1.0	233	32	9	3

Depository Credit Intermediation

Depository credit intermediation (banking) has an LQ of **.30** and with the 2022 employment figure of **324** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **1,083** jobs in this category, or about **42** new establishments:

Under this heading are three sub-headings: Commercial banking, Credit unions, and Savings institutions. Collectively, the types of companies that Cape Coral could benefit from include:

- Branches of foreign banks
- Commercial banks
- Corporate credit unions
- Depository trust companies
- Federal and state credit unions
- Federal savings banks
- Private banks

Nondepository Credit Intermediation

The Nondepository Credit Intermediation category has an LQ of **.74** and with the 2022 employment figure of **172** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **234** jobs in this category, or about **6** new establishments. Activities under this heading include:

- Car title lending
- International trade financing

- Collateralized mortgage obligation
- Consumer Lending
- Credit Card Issuing
- Federal Home Loan Banks
- Federal Home Loan Mortgage Corp.
- Financing, secondary market
- International, Secondary Market
- Purchasing of accounts receivable
- Real Estate Credit
- Real estate mortgage investment conduits
- Sales Financing
- Student Loan Marketing Association (SLMA)

Activities Related to Credit Intermediation

The Activities Related to Credit Intermediation group has an LQ of **.86** and with the 2022 employment figure of **201** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **32** jobs in this category, or about **3** new establishments:

Financial services under this title include:

- Check cashing services
- Check validation services
- Clearinghouses, bank or check
- Credit card processing services
- Electronic financial payment services
- Loan servicing
- Money order issuance services
- Money transmission services
- Mortgage and Nonmortgage Loan Brokers
- Payday lending services
- Travelers' check issuance services

Securities, Commodity Contracts, and Other Financial Investments and Related Activities -- Emerging, Tier 1

Under the 3-Digit NAICS heading of Securities, Commodity Contracts, and Other Financial Investments and Related Activities (523), there are three 4-digit industry classifications, two of which are present in Cape Coral:

- ❖ Securities & commodity contracts intermediation & brokerage (5231)
- ❖ **Securities & Commodity Exchanges (5232)**
- ❖ Other financial investment activities (5239)

Due to the nature of major city location for stock exchanges, the Securities and Commodity Exchanges category is excluded from further consideration. For the remaining other two segments, both industries have a presence in Cape Coral. Other Financial Investment Activities

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
5231	Securities & Commodity Contracts Intermediation & Brokerage	30	0.18	1.0	170	140	8	18
5239	Other Financial Investment Activities	173	1.05	--	--	--	3	--

The Other Financial Investment Activities category has an LQ above 1.0 and is not in need of direct support. Recruitment and attraction of companies in this area should be encouraged, with a typical firm size of about **3** persons. Typical activities under this heading include:

- Financial planning
- Mutual funds management
- Pension funds management
- Trusts management

Securities & Commodity Contracts Intermediation & Brokerage

The Securities and Commodity Contracts Intermediation and Brokerage group has an LQ of **.18** and with the 2022 employment figure of **30** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **140** jobs in this category, or about **18** new establishments. Activities in this category cover:

- Commodity contracts brokerages
- Cryptocurrency brokering
- Foreign currency exchange dealing
- Stock brokerages

Real Estate -- At-Risk, Tier 2

Under the 3-Digit NAICS heading of Real Estate (531), there are three 4-digit industry classifications, all of which are present in Cape Coral:

- ❖ Lessors of real estate (5311)
- ❖ Offices of real estate agents & brokers (5312)
- ❖ Activities related to real estate (5213)

Each of these classifications of industry are present in Cape Coral and two have LQ's below the 1.0 parity level:

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
5311	Lessors of Real Estate	202	0.83	1.0	241	39	5	8
5312	Offices of Real Estate Agents & Brokers	746	3.38	--	--	--	2	--
5313	Activities Related to Real Estate	440	0.88	1.0	498	58	6	9

Lessors of Real Estate

Lessors of Real Estate has an LQ of **.83** and a 2022 employment figure of **202** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **39** jobs in this category, or about **8** new establishments. Leasing of real estate include:

- Mini warehouses and Self-Storage Units
- Nonresidential Buildings
- Other Real Estate Property
- Residential Buildings and Dwellings

Offices Of Real Estate Agents and Brokers

Offices Of Real Estate Agents and Brokers has a yr. 2022 of LQ of 3.38 and does not need support. Recruitment and attraction of companies in this area should continue to be encouraged, with a company size averaging about **2** persons. Typical service include:

- Auctioning real estate
- Brokerages, real estate
- Buyers' agents, real estate
- Condominium time shares selling

Activities Related to Real Estate

Activities Related to Real Estate has an LQ of **.88** and with the 2022 employment figure of **440** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **58** jobs in this category, or about **9** new establishments. Activities include:

- Escrow agencies
- Property management
- Real estate appraisers
- Real estate consulting
- Real estate listing services

Education, Healthcare & Social Assistance

Ambulatory Health Care Services -- Declining, Tier 2

Under the 3-Digit NAICS heading of Ambulatory Health Care Services (621), there are seven 4-digit industry classifications, and all are present in Cape Coral:

- ❖ Offices of Physicians (6211)
- ❖ Offices of Dentists (6212)
- ❖ Offices of Other Health Practitioners (6213)
- ❖ Outpatient Care Centers (6214)
- ❖ Medical & Diagnostic Laboratories (6215)
- ❖ Home Health Care Services (6216)
- ❖ Other Ambulatory Health Care Services (6219)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
6211	Offices of Physicians	761	0.53	1.0	1,439	678	11	63
6212	Offices of Dentists	363	0.94	1.0	385	22	7	3
6213	Offices of Other Health Practitioners	432	0.96	1.0	446	14	5	3
6214	Outpatient Care Centers	247	0.70	1.0	350	103	17	6
6215	Medical & Diagnostic Laboratories	72	0.44	1.0	164	92	12	7
6216	Home Health Care Services	147	0.33	1.0	449	302	18	17
6219	Other Ambulatory Health Care Services	6	0.05	1.0	112	106	14	8

Offices of Physicians

The Offices of Physicians category has an LQ of **.53** and a 2022 employment figure of **761** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **678** jobs in this category, or about **63** new establishments. Medical activities include:

- Acupuncturists
- Allergists
- Family and general practice
- Osteopathic
- Psychiatrists
- Specialists
- Walk-in clinics

Offices of Dentists

The Offices of Dentists category has an LQ of **.94** and a 2022 employment figure of **363** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **22** jobs in this category, or about **3** new establishments. Dental activities include:

- Dental surgeons
- Endodontists
- General dentistry
- Orthodontists
- Periodontists

Offices of Other Health Practitioners

The Offices of Other Health Practitioners has an LQ of **.96** and a 2022 employment figure of **432** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **14** jobs in this category, or about **3** new establishments. Activities for this group include:

- Chiropractors
- Clinical psychologists
- Optometrist
- Psychotherapists
- Social workers, mental health

Outpatient Care Centers

The Outpatient Care Centers category has an LQ of **.70** and a 2022 employment figure of **247** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **103** jobs in this category, or about **6** new establishments. Activities for this group include:

- Biofeedback centers
- Community health centers
- Family Planning Centers
- Freestanding ambulatory, surgical & emergency Centers
- HMO Medical Centers
- Kidney Dialysis Centers
- Outpatient Mental Health & Substance Abuse
- Pain therapy centers
- Sleep disorder centers

Medical & Diagnostic Laboratories

The Medical & Diagnostic Laboratories category has an LQ of **.44** and a 2022 employment figure of **72** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **92** jobs in this category, or about **7** new establishments. Activities for this group include:

- Bacteriological laboratories
- Biological laboratories
- Magnetic resonance imaging
- Mammogram centers

- Blood analysis laboratories
- CT-SCAN centers
- Dental X-ray laboratories
- DNA testing laboratories
- Forensic laboratories
- Medical X-ray laboratories
- Mobile breast imaging centers
- Mobile X-ray facilities
- Radiological laboratories

Home Health Care Services

The Home Health Care Services category has an LQ of **.33** and a 2022 employment figure of **147** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **302** jobs in this category, or about **17** new establishments. Activities for this group include:

- Home health care agencies
- Home infusion therapy services
- In-home hospice care services
- Visiting nurse associations

Other Ambulatory Health Care Services

The Other Ambulatory Health Care Services category has an LQ of **.05** and a 2022 employment figure of **6** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **106** jobs in this category, or about **8** new establishments. Activities for this group include:

- Ambulance services, air
- Ambulance services, ground
- Blood banks
- Employee drug testing services
- Health screening services
- Hearing testing services
- Human egg or ova banks
- Human embryo storage services
- Medical care management services
- Organ banks, body
- Pacemaker monitoring services
- Physical fitness evaluation services
- Sperm banks, human

Hospitals -- Declining, Tier 2

Under the 3-digit NAICS heading of Hospitals (622), there are three 4-digit industry classifications:

- ❖ General Medical & Surgical Hospitals (6221)
- ❖ Psychiatric and Substance Abuse Hospitals (6222)
- ❖ Specialty (except Psychiatric and Substance Abuse) Hospitals (6223)

Only the General Medical and Surgical Hospitals category is present in Cape Coral.

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
6221	General Medical & Surgical Hospitals	400	0.22	1.0	1,915	1,515	389	5
6222	Psychiatric & Substance Abuse Hospitals	??	??	1.0	45	45	77	1
6223	Specialty (except Psychiatric and Substance Abuse) Hospitals	??	??	1.0	83	83	62	1

General Medical and Surgical Hospitals

The Offices of Dentists_category_has an LQ of .22 and a 2022 employment figure of **400** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **1,515** jobs in this category, or about **5** new establishments. Hospitals include:

- Children's hospitals, general
- General medical and surgical hospitals
- Micro-hospitals
- Osteopathic hospitals

Psychiatric & Substance Abuse Hospitals

The Psychiatric and Substance Abuse Hospitals group has no reported employment and could be considered as “missing”. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **45** jobs in the category, or about **1** new facility. Typical establishment size is about **77** persons and the type of these hospitals are as follows:

- Detoxification hospitals
- Drug and Alcoholism rehabilitation
- Psychiatric Hospitals

Specialty (except Psychiatric and Substance Abuse) Hospitals

The Specialty (except Psychiatric and Substance Abuse) Hospitals group has no reported employment and could be considered as “missing”. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **83** jobs in the category, or about **1** new facility. Typical establishment size is about **62** persons and the type of these hospitals typically include:

- Cancer hospitals
- Children's hospitals, specialty
- Eye, ear, nose, & throat hospitals
- Maternity hospitals
- Physical rehabilitation hospitals

Social Assistance -- Emerging, Tier 1

Under the 3-Digit NAICS heading of Hospitals (624), there are three 4-digit industry classifications, three of which are present in Cape Coral:

- ❖ Individual & Family Services (6241)
- ❖ Community Food & Housing, & Emergency & Other Relief Services (6242)
- ❖ Vocational Rehabilitation Services (6243)
- ❖ Childcare Services (6244)

Three of the four classifications of industry are present in Cape Coral.

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
6241	Individual & Family Services	196	0.54	1.0	366	170	4	42
6242	Community Food & Housing, & Emergency & Other Relief Services	6	0.11	1.0	56	50	14	3
6243	Vocational Rehabilitation Services	??	??	1.0	71	71	21	3
6244	Childcare Services	358	1.06	--	--	--	13	--

Individual and Family Services

The Individual and Family Services category has an LQ of .54 and a 2022 employment figure of 196 persons. To meet the 1.0 LQ threshold, we would like to see an increase in 170 jobs in this category, or about 42 new establishments. Services typically include:

- Activity centers, disabled persons
- Adoption agencies
- Adult day care centers
- Alcoholism and drug addiction self-help
- Child welfare services
- Community action service agencies
- Community Centers, senior citizens'
- Community centers, youth
- Community health education services
- Crisis intervention centers
- Disability support groups
- Ex-offender rehabilitation agencies
- Foster care placement agencies
- Hotline centers
- Marriage counseling services
- Parenting support services
- Parole offices, privately operated
- Rape crisis centers
- Referral services for social problems
- Self-help org. for disabled persons, elderly
- Suicide crisis centers
- Teen outreach services
- Travelers' aid centers
- Welfare service centers, multi-program
- Youth self-help organizations

Community Food & Housing, & Emergency and Other Relief Services

The Community Food and Housing, and Emergency and Other Relief Services Category has an LQ of **.11** and a 2022 employment figure of **6** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **50** jobs in this category, or about **3** new establishments. Activities include:

- Disaster relief services
- Emergency shelters
- Energy assistance programs
- Food banks
- Homeless shelters
- Housing assistance agencies
- Immigrant resettlement services
- Meal delivery programs
- Mobile soup kitchens
- Volunteer housing repair organizations

Vocational Rehabilitation Services

The Vocational Rehabilitation Services group has no reported employment and could be considered as “missing”. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **71** jobs in the category, or about **3** new firms. Typical establishment size is **21** persons and the type of services in the category are as follows:

- Job counseling
- Sheltered workshops
- Vocational habilitation

Childcare Services

The Childcare Services category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with typical establishment size of about **13** persons, with the following typical service offered:

- Babysitting services
- Before- and after-school educational programs
- Child day care centers
- Head Start and Early Head Start programs
- Preschool centers

Manufacturing

Printing & Related Support Activities -- Competitive, Tier 1

Under the 3-Digit NAICS heading of Printing & Related Support Activities (323), there is only the one 4-digit industry classifications:

❖ Printing & Related Support Activities (3231)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
3231	Printing & Related Support Activities	256	2.65	--	--	--	8	--

The Printing & Related Support Activities category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with typical establishment size of about **8** persons. Typical activities include:

- Book binding
- Book printing
- Color separation services
- Commercial screen printing
- Gold stamping books for the trade
- Imagesetting services, prepress
- Lithographic plate preparation services
- Postpress services

Fabricated Metal Products Mfg. -- Competitive, Tier 1

Under the 3-Digit NAICS heading of Fabricated Metal Products Mfg. (332), there are nine 4-digit industry classifications:

- ❖ Forging and Stamping (3321)
- ❖ Cutlery & Handtool Manufacturing (3322)
- ❖ Architectural & Structural Metals Manufacturing (3323)
- ❖ Boiler, Tank, & Shipping Container Manufacturing (3324)
- ❖ Hardware Manufacturing (3325)
- ❖ Spring & Wire Product Manufacturing (3326)
- ❖ Machine Shops; Turned Product; & Screw, Nut, and Bolt Manufacturing (3327)
- ❖ Coating, Engraving, Heat Treating, & Allied Activities (3328)
- ❖ Other Fabricated Metal Product Manufacturing (3329)

The five above highlighted industries do not have presence in Lee County and are excluded from further consideration.

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
3323	Architectural and structural metals manufacturing	248	1.89	--	--	--	8	--
3327	Machine Shops; Turned Product; & Screw, Nut, and Bolt Mfg.	??	??	1.0	30	30	10	3
3328	Coating, Engraving, Heat Treating, & Allied Activities	??	??	1.0	12	12	10	1
3329	Other Fabricated Metal Product Manufacturing	??	??	1.0	35	35	13	3

Architectural and Structural Metals Manufacturing

The Architectural and Structural Metals Manufacturing has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with a typical establishment size of about **8** persons. Output in this category includes:

- Metal window and doors
- Ornamental & architectural metal products
- Ornamental and architectural metal work
- Plate work & fabricated structural products
- Prefabricated metal building
- Sheet metal work

Machine Shops; Turned Product; & Screw, Nut, and Bolt Mfg.

In the Machine Shops; Turned Product; and Screw, Nut, and Bolt Mfg. category, there is no reported employment in Cape Coral, making this a “missing” industry. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **30** jobs in the category, or about **3** new facilities. Typical establishment size is about **10** persons and the type of these hospitals typically include:

- Bolts
- Hooks
- Hose clamps
- Nuts
- Rivets
- Screws
- Screw eyes
- Turnbuckles
- Washers

Coating, Engraving, Heat Treating, & Allied Activities

In the Coating, Engraving, Heat Treating, & Allied Activities category, there is no reported

employment in Cape Coral, denoting this a “missing” industry. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **12** jobs in the category, or about **1** new facility. Typical establishment size is about **10** persons and the type of metal processes these of manufacturers include:

- Annealing
- Brazing
- Cold treating
- Tempering
- Tempering
- Engraving
- Electroplating
- Plating
- Polishing
- Anodizing
- Coloring

Other Fabricated Metal Product Manufacturing

In the Other Fabricated Metal Product Manufacturing category, there is no reported employment in Cape Coral, denoting this a “missing” industry. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **35** jobs in the category, or about **3** new facilities. Typical establishment size is about **13** persons and the type of metal products by these manufacturers include:

- Ball and roller bearings
- Fabricated pipe
- Hose fittings
- Industrial valves
- Metal valves
- Misc. fabricated metal parts
- Plumbing fixture fittings
- Small arms ammunition

Information

Publishing Industries (except Internet) -- Emerging, Tier 1

Under the 3-Digit NAICS heading of Publishing Industries (except Internet) (513), there are two 4-digit industry classifications, one of which is present in Cape Coral:

- ❖ Newspaper, Periodical, Book, & Directory Publishers (5131)
- ❖ Software Publishers (5132)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
5131	Newspaper, Periodical, Book, & Directory Publishers	119	2.65	--	--	--	7	--
5132	Software Publishers	??	??	1.0	137	137	5	27

Newspaper, Periodical, Book, & Directory Publishers

The Newspaper, Periodical, Book, & Directory Publishers category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with typical establishment size of about **7** persons. Typical activities include:

- Advertising periodical publishers
- Agricultural magazine and periodicals
- Comic book publishers
- Internet newspaper publishing
- Magazine and periodical publishers
- Publishers, newspaper, with printing
- Radio guide publishers
- Scholarly journal publishers
- Technical magazine and periodical publishers
- Trade journal publishers

Software Publishers

In the Software Publishers area, there is no reported employment in Cape Coral, making this a “missing” industry. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **137** jobs in the category, or about **27** new facilities. Typical establishment size is about **5** persons and the output of the industry includes:

- Applications software
- Gaming site publishers
- Mobile applications development
- Utility software

Telecommunications -- At-Risk, Tier 2

Under the 3-Digit NAICS heading of Telecommunications (517), there are three 4-digit industry classifications, one of which is present in Cape Coral:

- ❖ Wired & Wireless Telecommunications (5171)
- ❖ Satellite Telecommunications (5174)
- ❖ All Other Telecommunications (5178)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
5171	Wired & Wireless Telecommunications	309	1.18	--	--	--	22	--
5174	Satellite Telecommunications	??	??	1.0	3	3	7	1
5178	All Other Telecommunications	??	??	1.0	11	11	6	2

Wired & Wireless Telecommunications

The Wired & Wireless Telecommunications category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with typical establishment size of about **22** persons. Typical activities include:

- Cable program distribution operators
- Cable TV providers (except networks)
- Closed-circuit television (CCTV) services
- Long-distance telephone carriers, wired
- Satellite television distribution systems
- VoIP service providers

Satellite Telecommunications

In the Satellite Telecommunications category, there is no reported employment in Cape Coral, making this a “missing” industry. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **3** jobs in the category, or **1** new facility. Typical establishment size is about **7** persons and the type of activities include:

- Earth stations for satellite communication carriers
- Long-distance telephone satellite communication carriers
- Resellers, satellite telecommunication
- Satellite telecommunication carriers

All Other Telecommunications

In the All Other Telecommunications category, there is no reported employment in Cape Coral, indicating this is a “missing” industry. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **11** jobs in the category, or **2** new facilities. Typical establishment size is about **6** persons and the type of activities include:

- Internet service providers
- Online access service providers
- Satellite telemetry operations

Other Missing Information Industries

As the Information Sector is in the LQ's Declining quadrant, it is vital to bolster this industry with new job creation. While the following 4-digit Information industries did not emerge naturally from the LQ analysis, it is simply their absence from the Cape Coral market which compels us to add them here.

- ❖ Motion Picture & Video Industries (5121)

- ❖ Sound Recording Industries (5122)
- ❖ Radio & Television Broadcasting Stations (5161)
- ❖ Media Streaming Distribution Services, Social Networks, & Other Media Networks & Content Providers (5162)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
5121	Motion Picture & Video Industries	??	??	1.0	68	68	8	9
5122	Sound Recording Industries	??	??	1.0	7	7	3	2
5161	Radio & Television Broadcasting Stations	??	??	1.0	37	37	25	1
5162	Media Streaming Distribution Services, Social Networks, & Other Media Networks & Content Providers	??	??	1.0	45	45	10	5

Motion Picture & Video Industries

In the Motion Picture & Video Industries category, there is no reported employment in Cape Coral, indicating this is a “missing” industry. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **68** jobs in the category, or **9** new facilities. Typical establishment size is about **8** persons and the type of activities include:

- Animated cartoon production
- Commercials, television, production
- Motion picture production
- Animated cartoon production
- Commercials, television, production
- Motion picture production

Sound Recording Industries

In the Sound Recording Industries category, there is no reported employment in Cape Coral, making this is a “missing” industry. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **7** jobs in the category, or **2** new facilities. Typical establishment size is about **3** persons and the type of activities include:

- Audio recording of meetings or conferences
- Audio recording postproduction services
- Audio recording restoration services
- Master recording leasing & licensing
- Music, sheet, publishers & printing combined
- Radio program recording production
- Record releasing, promoting, & distributing combined with mass duplication
- Sound recording studios

- Music copyright authorizing use

Radio & Television Broadcasting Stations

- Stock music & other audio services

In the Radio & Television Broadcasting Stations category, there is no reported employment in Cape Coral, making this a “missing” industry. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **37** jobs in the category, or **1** new facility. Typical establishment size is about **25** persons and the type of activities include:

- Advertising sales offices of independent & public radio broadcast stations
- Broadcasting stations (except exclusively on Internet), radio
- Piped-in music services, radio transmitted
- Rebroadcast radio stations
- Television broadcasting stations

Media Streaming Distribution Services, Social Networks, & Other Media Networks & Content Providers

In the Media Streaming Distribution Services, Social Networks, & Other Media Networks & Content Providers category, there is no reported employment in Cape Coral, indicating this is a “missing” industry. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **45** jobs in the category, or **5** new facilities. Typical establishment size is about **10** persons & the type of activities include:

- Stand-alone streaming services
- Subscription Video on Demand (SVOD)
- Syndicates, news
- Virtual Multichannel Video Programming
- Web broadcasting
- Wiki sites, Internet

Professional & Business Services

Professional, Scientific, & Technical Services -- Declining, Tier 2

Under the 3-Digit NAICS heading of Professional, Scientific, & Technical Services (541), there are eight 4-digit industry classifications, seven of which are present in Cape Coral.

- ❖ Legal Services (5411)
- ❖ Accounting, Tax Preparation, Bookkeeping, & Payroll Services (5412)
- ❖ Architectural, Engineering, & Related Services (5413)
- ❖ Specialized Design Services (5414)
- ❖ Computer Systems Design & Related Services (5415)

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- ❖ Management, Scientific, & Technical Consulting Services (5416)
- ❖ Scientific Research & Development Services (5417)
- ❖ Advertising, Public Relations, & Related Services (5418)
- ❖ Other Professional, Scientific, & Technical Services (5419)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
5411	Legal Services	422	0.66	1.0	644	222	5	129
5412	Accounting, Tax Preparation, Bookkeeping, & Payroll Services	550	1.11	--	--	--	5	--
5413	Architectural, Engineering, & Related Services	387	0.65	1.0	593	206	8	76
5414	Specialized Design Services	105	1.51	--	--	--	3	--
5415	Computer Systems Design & Related Services	391	0.50	1.0	788	397	6	138
5416	Management, Scientific, & Technical Consulting Services	624	0.70	1.0	898	274	4	230
5417	Scientific Research & Development Services	--	--	1.0	127	127	5	26
5418	Advertising, Public Relations, & Related Services	133	0.86	1.0	155	22	10	16
5419	Other Professional, Scientific, & Technical Services	505	1.37	--	--	--	5	--

Legal Services

The Legal Services category has an LQ of **.66** and a 2022 employment figure of **422** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **222** jobs in this category, or about **129** new firms. Services typically include:

- Jury consulting services
- Lawyers
- Notaries
- Paralegal services
- Process server services
- Process serving services
- Title Abstract & Settlement Offices

Accounting, Tax Preparation, Bookkeeping, & Payroll Services

The Accounting, Tax Preparation, Bookkeeping, & Payroll Services category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses

should be encouraged, with typical establishment size of about **5** persons. Typical activities include:

- Auditors
- Billing services
- Bookkeepers' offices
- Certified public accountants
- Income tax compilation services
- Medical coding services
- Payroll processing services

Architectural, Engineering, & Related Services

The Architectural, Engineering, & Related Services category has an LQ of **.65** and a 2022 employment figure of **387** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **206** jobs in this category, or about **76** new firms. Services typically include:

- Acoustical engineering consulting services
- Architects' offices
- Architectural consultants
- Chemical engineering services
- Civil engineering services
- Electrical engineering services
- Geophysical engineering services
- Golf course design services
- Industrial engineering services
- Landscape architects' offices
- Marine engineering services
- Mechanical engineering services
- Mining engineering services
- Petroleum engineering services
- Robotics automation engineering services
- Traffic engineering consulting services
- Urban planning services

Specialized Design Services

The Specialized Design Services category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with typical establishment size of about **3** persons. Typical activities include:

- Graphic Design Services
- Industrial Design Services
- Interior Design Services

Computer Systems Design & Related Services

The Computer Systems Design & Related Services category has an LQ of **.50** and a 2022 employment figure of **391** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **397** jobs in this category, or about **138** new firms. Services typically include:

- Applications software programming
- Industrial robot automation applications
- Machine vision software design
- Search engine optimization (SEO) services
- CAM (computer-aided manufacturing) systems
- Local area network (LAN) computer systems
- Network systems integration design services
- Systems integration design services

- Web page design services, custom
- CAD (computer-aided design) systems
- CAE (computer-aided engineering) systems
- Computer disaster recovery services
- Software installation services

Management, Scientific, & Technical Consulting Services

The Management, Scientific, & Technical Consulting Services has an LQ of **.70** and a 2022 employment figure of **624** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **274** jobs in this category, or about **230** new firms. Services typically include:

- Economic consulting services
- Energy consulting services
- Environmental Consulting
- Human Resources Consulting
- Management Consulting
- Marketing Consulting
- Other technical consulting services
- Process, Physical Distribution, & Logistics Consulting

Scientific Research & Development Services

In the Scientific Research & Development Services category, there is no reported employment in Cape Coral, indicating this is a “missing” industry. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **127** jobs in the category, or **26** new facilities. Typical establishment size is about **5** persons & the type of activities include:

- Aerospace R & D
- Agriculture R & D
- Artificial intelligence R & D
- Behavioral R & D
- Biotechnology R & D
- Economic R & D
- Electronic R & D
- Environmental R & D
- Nanotechnology R & D
- Robotics R & D
- Social Sciences R & D
- Veterinary R & D

Advertising, Public Relations, & Related Services

The Advertising, Public Relations, & Related Services category has an LQ of **.86** and a 2022 employment figure of **133** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **22** jobs in this category, or about **16** new firms. Services typically include:

- Advertising Agencies
- Advertising Material Distribution Services
- Advertising specialties
- Demonstration services, merchandise
- Direct Mail Advertising
- Indoor & Outdoor Display Advertising
- Media Buying Agencies
- Media Representatives
- Public Relations Agencies
- Sign lettering & painting services
- Window dressing or trimming services

Other Professional, Scientific, & Technical Services

The Other Professional, Scientific, & Technical Services category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with typical establishment size of about 5 persons. Major activities include:

- Business brokers
- Commercial Photography
- Construction estimation services
- Consumer credit counseling services
- Fire extinguisher testing
- Handwriting analysis services
- Marine surveyor
- Marketing Research & Public Opinion
- Meteorological services
- Photography Studios, Portrait
- Pipeline inspection
- Quantity surveyor services
- Translation & Interpretation Services
- Veterinary Services

Administrative & Support Services -- Declining, Tier 2

Under the 3-Digit NAICS heading of Administrative & Support Services (541), there are seven 4-digit industry classifications, six of which have presence in Cape Coral.

- ❖ Office Administrative Services (5611)
- ❖ Facilities Support Services (5612)
- ❖ Employment Services (5613)
- ❖ Business Support Services (5614)
- ❖ Investigation & Security Services (5616)
- ❖ Services to Buildings & Dwellings (5617)
- ❖ Other Support Services (5619)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
5611	Office Administrative Services	230	0.81	1.0	283	53	6	10
5612	Facilities Support Services	??	??	1.0	73	73	30	2
5613	Employment Services	103	0.07	1.0	1,579	1,476	14	103
5614	Business Support Services	118	0.25	1.0	477	359	12	29
5616	Investigation & Security Services	309	0.68	1.0	451	142	18	8
5617	Services to Buildings & Dwellings	1,867	1.67	--	--	--	7	--
5619	Other Support Services	10	0.11	1.0	93	83	8	11

Office Administrative Services

The Office Administrative Services category has an LQ of **.81** and a 2022 employment figure of **230** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **53** jobs in this category, or about **10** new firms. Services typically include:

- Business management services
- Industrial management services
- Hotel management services
- Medical office management services

Facilities Support Services

In the Facilities Support Services category, there is no reported employment in Cape Coral, indicating this is a “missing” industry. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **73** jobs in the category, or **2** new facilities. Typical establishment size is about **30** persons and the type of activities include:

- Base facilities operation support
- Correctional facility operation

Employment Services

The Employment Services category has an LQ of **.07** and a 2022 employment figure of **103** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **1,476** jobs in this category, or about **103** new firms. Services typically include:

- Babysitting bureaus
- Casting agencies
- Chauffeur registries
- Contract staffing services
- Employee leasing services
- Employment agencies
- Executive placement services
- Internet job listing services
- Maid registries
- Manpower pools
- Model registries
- Nurse registries
- Office supply pools
- Professional employer org. (PEO)s
- Referral agencies
- Ship crew registries
- State operated services offices
- Temporary help services

Business Support Services

The Business Support Services_category has an LQ of **.25** and a 2022 employment figure of **118** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **359** jobs in this category, or about **29** new firms. Services typically include:

- Account collection services
- Adjustment agencies
- Blueprinting services
- Business service centers
- Copy centers
- Desktop publishing services
- Dictation services
- Document transcription services
- Emergency telephone dispatch
- Mailbox rental centers, private
- Message services
- Parcel mailing services
- Proofreading services
- Secretarial services
- Tax collection services
- Technical editing services
- Telephone call centers
- Typing services

Investigation & Security Services

The Investigation & Security Services category has an LQ of **.68** and a 2022 employment figure of **309** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **142** jobs in this category, or about **8** new firms. Services typically include:

- Alarm system monitoring services
- Alarm systems sales
- Background check services
- Bounty hunting services
- Detective agencies
- Fingerprint services
- Guard dog services
- Lie detection services
- Locksmith services
- Parking security services
- Patrol services, security
- Protection services

Services to Buildings & Dwellings

The Services to Buildings & Dwellings category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with typical establishment size of about **7** persons. Major activities include:

- Building exterior cleaning services
- Building gas systems conversion
- Carpet & Upholstery Cleaning
- Chimney cleaning services
- Drain cleaning services
- Drain cleaning services
- Exterminating & Pest Control Services
- Gutter cleaning services
- Janitorial Services
- Landscaping Service
- Swimming pool cleaning
- Ventilation duct cleaning services

Other Support Services

The Other Support Services category has an LQ of **.11** and a 2022 employment figure of **10** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **83** jobs in this category, or about **11** new firms. Services typically include:

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- Auctioneers
- Bottle exchanges
- Convention & Trade Show Organizers
- Coupon redemption services
- Diving services
- Document shredding services
- Lumber grading services
- Packaging & Labeling Services
- Printing brokers
- Private volunteer firefighting
- Trading stamp redemption services
- Underground utility locating services
- Water softening services

Tourism & Leisure

Food Services & Drinking Places -- At-Risk, Tier 2

Under the 3-Digit NAICS heading of Food Services & Drinking Places (722), there are three 4-digit industry classifications, all of which are present in Cape Coral.

- ❖ Special Food Services (7223)
- ❖ Drinking Places (Alcoholic Beverages) (7224)
- ❖ Restaurants & Other Eating Places (7225)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
7223	Special Food Services	110	0.48	1.0	227	117	9	12
7224	Drinking Places (Alcoholic Beverages)	167	1.05	--	--	--	13	--
7225	Restaurants & Other Eating Places	6,205	1.39	--	--	--	19	--

Special Food Services

The Special Food Services category has an LQ of **.48** and a 2022 employment figure of **110** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **117** jobs in this category, or about **12** new firms. Services typically include:

- Airline food services
- Bartender services
- Cafeteria food services
- Catering services
- Food carts & trucks, mobile
- Food concessions
- Ice cream truck vendors
- Lunch wagons
- Refreshment stands, mobile

Drinking Places (Alcoholic Beverages)

The Drinking Places (Alcoholic Beverages) category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with typical establishment size of about **13** persons. Typical facilities include:

- Bars
- Brew pubs
- Nightclubs

Restaurants & Other Eating Places

The Restaurants & Other Eating Places category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with typical establishment size of about **19** persons. Typical facilities include:

- | | |
|------------------------|----------------------------|
| • Bagel shops | • Full-service restaurants |
| • Carryout restaurants | • Ice cream parlors |
| • Delicatessens | • Juice bars |
| • Diners, full service | • Pizzerias |
| • Doughnut shops | • Pretzel shops |
| • Drive-in restaurants | • Snack bars |
| • Frozen yogurt shops | • Steak houses |

Other Services

Repair & Maintenance -- Competitive, Tier 1

Under the 3-Digit NAICS heading of Repair & Maintenance (811), there are four 4-digit industry classifications, three of which are present in Cape Coral.

- ❖ Automotive Repair & Maintenance (8111)
- ❖ Electronic & Precision Equipment Repair & Maintenance (8112)
- ❖ Commercial & Industrial Machinery & Equipment (except Automotive & Electronic) Repair & Maintenance (8113)
- ❖ Personal & Household Goods Repair & Maintenance (8114)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
8111	Automotive Repair & Maintenance	743	2.14	--	--	--	5	--
8112	Electronic & Precision Equipment Repair & Maintenance	8	0.16	1.0	51	43	5	8
8113	Commercial & Industrial Machinery & Equipment (Except Automotive & Electronic) Repair & Maintenance	??	??	1.0	54	54	7	8
8114	Personal & Household Goods Repair & Maintenance	151	2.37	--	--	--	3	--

Automotive Repair & Maintenance

The Automotive Repair & Maintenance category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with typical establishment size of about 5 persons. Typical facilities include:

- Automotive air-conditioning repair shops
- Body Shops
- Car Washes
- Diagnostic centers
- General Automotive Repair
- Glass Replacement Shops
- Oil Change and Lubrication Shops
- safety inspection services
- Specialized Automotive Repair
- Tire repair shops
- Undercoating shops

Electronic & Precision Equipment Repair & Maintenance

The Electronic & Precision Equipment Repair & Maintenance category has an LQ of .16 and a 2022 employment figure of 8 persons. To meet the 1.0 LQ threshold, we would like to see an increase in 43 jobs in this category, or about 8 new firms. Services typically include:

- Broadcast equipment repair
- Camera repair
- Cellular telephone repair
- Communication equipment repair
- Computer peripheral equipment repair
- Dental equipment repair
- Measuring instrument repair
- Medical and surgical equipment repair
- Navigational instruments repair
- Stereo equipment repair
- Television repair services
- Typewriter repair

- Diagnostic imaging equipment repair
- Weighing equipment repair

Commercial & Industrial Machinery & Equipment (Except Automotive & Electronic) Repair & Maintenance

In the Commercial & Industrial Machinery & Equipment (Except Automotive & Electronic) Repair & Maintenance category, there is no reported employment in Cape Coral, indicating this is a “missing” industry. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **54** jobs in the category, or **8** new facilities. Typical establishment size is about **7** persons and the type of activities include:

- Agricultural machinery & equip. repair
- Blade sharpening
- Cargo container repair and maintenance
- Commercial refrig. equip. & repair
- Constr. machinery and equip. & repair
- Electric motor repair & maint. services
- Fire extinguisher repair and maintenance
- Machine tools repair & maintenance
- Printing trade machinery repair & maint.
- Restaurant fryer equip. cleaning services
- Welding repair services

Personal & Household Goods Repair & Maintenance

The Personal & Household Goods Repair & Maintenance category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with a typical establishment size of about **3** persons. Typical facilities include:

- Appliance Repair & Maintenance
- Bicycle repair & maintenance shops
- Footwear & Leather Goods Repair
- Fur garment repair shops
- Gun repair & maintenance shops
- Home & Garden Equip.
- Jewelry repair shops
- Key duplicating shops
- **Motorboat repair & maintenance**
- Motorcycle repair shops
- **Pleasure boat maintenance services**
- Reupholstery & Furniture Repair
- Sporting equip. repair & maintenance
- Tailor shops
- Window shade repair

Construction

Specialty Trade Contractors -- Competitive, Tier 1

Under the 3-Digit NAICS heading of Specialty Trade Contractors (238), there are four 4-digit industry classifications, all of which are present in Cape Coral.

- ❖ Foundation, structure, and building exterior contractors (2381)
- ❖ Building equipment contractors (2382)
- ❖ Building finishing contractors (2383)
- ❖ Other specialty trade contractors (2389)

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
2381	Foundation, Structure, & Building Exterior Contractors	862	1.48	--	--	--	8	--
2382	Building Equipment Contractors	1,959	1.91	--	--	--	10	--
2383	Building Finishing Contractors	1,223	2.85	--	--	--	4	--
2389	Other Specialty Trade Contractors	872	2.79	--	--	--	7	--

Foundation, Structure, & Building Exterior Contractors

The Foundation, Structure, & Building Exterior Contractors category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with a typical establishment size of about **8** persons. Typical facilities include:

- Awning installation
- Concrete form contractors
- Epoxy application contractors
- Framing Contractors
- Glass and Glazing Contractors
- Masonry Contractors
- Metal furring contractors
- Ornamental metal work installation
- Poured Concrete Foundation & Structure
- Roofing Contractors
- Shutter installation
- Siding Contractors
- Stairway, metal, installation
- Structural Steel and Precast Concrete
- Welding, on-site, contractors

Building Equipment Contractors

The Building Equipment Contractors category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with a typical establishment size of about **10** persons. Typical facilities include:

- Commercial kitchen equipment
- Duct insulation installation
- Electrical Contractors
- Elevator & Conveyor systems installation
- Garage doors
- Lightning protection equipment
- Machine rigging
- Pipe, duct and boiler insulation
- Plumbing, Heating, and Air-Conditioning
- Satellite dish, household-type, installation
- Vault, safe and banking
- Vehicle lift installation

Building Finishing Contractors

The Building Finishing Contractors category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with a typical establishment size of about **4** persons. Typical facilities include:

- Building fixture and fitting
- Drywall and Insulation
- Finish Carpentry
- Flooring
- Foundation damp proofing
- Laboratory furniture & equip.
- Modular furniture systems
- Building fixture and fitting
- Painting and Wall Covering
- Partition, moveable
- Shelving, metal
- Spectator seating installation
- Tile and Terrazzo
- Window shade and blind installation
- Painting and Wall Covering

Other Specialty Trade Contractors

The Other Specialty Trade Contractors category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with a typical establishment size of about **7** persons. Typical facilities include:

- Billboard erection
- Blasting, building demolition
- Building interior gutting and stripping
- Crane rental with operator
- Demolition, building and structure
- Dewatering contractors
- Driveway paving or sealing
- Equipment rental
- Exterior demolition contractors
- Interior demolition
- Manufactured home set up and tie-down
- Outdoor swimming pools
- Paver, brick installation
- Paving, residential and commercial
- Sandblasting building exteriors
- Scaffold erecting and dismantling
- Septic system contractors
- Steeplejack work

- Fence installation
- Foundation drilling contractors
- Grading construction sites
- Billboard erection
- Trenching (except underwater)
- Underground tank removal
- Wrecking, building or other structure

Wholesale Trade

Merchant Wholesalers, Durable Goods -- Emerging, Tier 1

Under the 3-Digit NAICS heading of Specialty Trade Contractors (238), there are nine 4-digit industry classifications, six of which are present in Cape Coral.

- ❖ Motor Vehicle & Motor Vehicle Parts & Supplies Merchant Wholesalers
- ❖ Furniture & Home Furnishing Merchant Wholesalers
- ❖ Lumber & Other Construction Materials Merchant Wholesalers
- ❖ Professional & Commercial Equipment & Supplies Merchant Wholesalers
- ❖ Metal & Mineral (Except Petroleum) Merchant Wholesalers
- ❖ Household Appliances & Electrical & Electronic Goods Merchant Wholesalers
- ❖ Hardware, Plumbing & Heating Equipment & Supplies Merchant Wholesalers
- ❖ Machinery, Equipment, & Supplies Merchant Wholesalers
- ❖ Miscellaneous Durable Goods Merchant Wholesalers

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
4231	Motor Vehicle & Motor Vehicle Parts & Supplies Merchant Wholesalers	??	??	1.0	88	88	10	9
4232	Furniture & Home Furnishing Merchant Wholesalers	56	1.36	--	--	--	7	--
4233	Lumber & Other Construction Materials Merchant Wholesalers	40	0.37	1.0	109	69	10	7
4234	Professional & Commercial Equipment & Supplies Merchant Wholesalers	56	0.17	1.0	325	269	10	26
4235	Metal & Mineral (Except Petroleum) Merchant Wholesalers	??	??	1.0	25	25	7	3
4236	Household Appliances & Electrical & Electronic Goods Merchant Wholesalers	99	0.70	1.0	141	42	8	5

4237	Hardware, Plumbing & Heating Equipment & Supplies Merchant Wholesalers	80	0.64	1.0	124	44	11	4
4238	Machinery, Equipment, & Supplies Merchant Wholesalers	118	0.57	1.0	207	89	8	12
4239	Miscellaneous Durable Goods Merchant Wholesalers	??	??	1.0	98	98	5	19

Motor Vehicle & Motor Vehicle Parts & Supplies Merchant Wholesalers

In the Motor Vehicle & Motor Vehicle Parts & Supplies Merchant Wholesalers category, there is no reported employment in Cape Coral, indicating this is a “missing” industry. To meet the 1.0 LQ threshold, we would like to see the establishment of the industry by **88** jobs in the category, or **9** new facilities. Typical establishment size is about **10** persons and the type of products include:

- All-terrain vehicles
- Ambulances
- Automobiles
- Bicycles, motorized
- Buses
- Camping trailers
- Cargo vans
- Recreational vehicles
- Sport utility vehicles
- Taxicabs
- Tractors, highway
- Used cars
- Utility trailer

Furniture & Home Furnishing Merchant Wholesalers

The Furniture & Home Furnishing Merchant Wholesalers category has an LQ above the 1.0 parity level and has no immediate need of support. Continued recruitment of these businesses should be encouraged, with a typical establishment size of about **7** persons. Typical products include:

- Antique furniture
- Baby furniture
- Bathroom accessories
- Beds
- Blankets
- Blinds and shades
- Brooms and brushes
- Carpet
- Ceramic wall and floor tile
- Chinaware
- Closet accessories
- Glassware
- Hotel furniture
- Household-type furniture
- Lighting fixtures
- Linens
- Mattresses
- Mirrors
- Mops
- Office furniture
- Outdoor furniture
- Public building furniture

- Containers, household
- Cooking utensils
- Cups, plastics
- Draperies
- Frames and pictures
- Furniture parts
- Religious furniture
- Restaurant furniture
- School furniture
- Store furniture
- Tableware
- Theater seats

Lumber & Other Construction Materials Merchant Wholesalers

The Lumber & Other Construction Materials Merchant Wholesalers category has an LQ of **.37** and a 2022 employment figure of **40** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **69** jobs in this category, or about **7** new firms. Typical products include:

- Awnings
- Brick, Stone, & Related Materials
- Ceiling tile
- Countertops
- Culvert pipe, metal and plastics
- Fencing and fencing accessories
- Flat glass
- Lumber, Plywood, Millwork
- Ornamental ironwork
- Prefabricated buildings
- Roofing, Siding, & Insulation
- Septic tanks
- Silt fence and other fabrics
- Storage bins

Professional & Commercial Equipment & Supplies Merchant Wholesalers

The Professional & Commercial Equipment & Supplies Merchant Wholesalers category has an LQ of **.17** and a 2022 employment figure of **56** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **269** jobs in this category, or about **26** new firms. Services typically include:

- Balances and scales
- Church supplies
- Coin /card-operated merch. machines
- Commercial chinaware
- Commercial cooking equipment
- Commercial shelving
- Computer & peripheral equipment
- Drafting tables and instruments
- Electrical signs
- Laboratory equipment
- Medical, dental, and hospital equipment
- Office equipment
- Ophthalmic goods
- Partitions
- Photographic equipment and supplies
- School equipment and supplies
- Scientific instruments
- Store fixtures
- Surveying equipment and supplies

Metal & Mineral (Except Petroleum) Merchant Wholesalers

In the Metal & Mineral (Except Petroleum) Merchant Wholesalers category, there is no reported employment in Cape Coral, indicating this is a “missing” industry. To meet the 1.0 LQ threshold, we

would like to see the establishment of the industry by **25** jobs in the category, or **3** new facilities. Typical establishment size is about **7** persons and the type of products include:

- Cast iron pipe
- Metal ingots
- Metal ores
- Metal pipe
- Metal plates
- Metal rods, bars and sheets
- Metal spikes
- Metallic concentrates
- Nails
- Noninsulated wire
- Nonmetallic minerals
- Precious metal ores

Household Appliances & Electrical & Electronic Goods Merchant Wholesalers

The Household Appliances & Electrical & Electronic Goods Merchant Wholesalers category has an LQ of **.70** and a 2022 employment figure of **99** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **42** jobs in this category, or about **5** new firms. Products typically include:

- Alarm apparatus
- Amplifiers, audio
- Antennas
- Batteries
- Blank compact discs
- Boxes and fittings
- Broadcasting equipment
- Capacitors, electronic
- Carbon monoxide detectors
- Cellular telephones
- Circuit boards
- Coils, electronic
- Communications equipment
- Computer chips
- Fastening devices, electrical
- Fittings, electrical
- Generators
- Household Appliances
- Insulated wire or cable
- Modems and routers
- Motors, electric
- Natural gas detectors
- Navigational instruments
- Radar equipment
- Radar equipment
- Radio parts and accessories
- Relays
- Security systems
- Signal systems
- Solar cells
- Switchboards
- Switches, electronic
- Telephone equipment
- Touch-screen displays
- Transmission equipment
- Wiring supplies

Hardware, Plumbing & Heating Equipment & Supplies Merchant Wholesalers

The Hardware, Plumbing & Heating Equipment & Supplies Merchant Wholesalers category has an LQ of **.64** and a 2022 employment figure of **80** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **44** jobs in this category, or about **4** new firms. Products typically include:

- Air-conditioning equipment
- Bathtubs
- Heat pumps
- Humidifiers and dehumidifiers

- Beverage coolers, mechanical
- Boilers
- Brads
- Burners, fuel oil
- Cold storage machinery
- Cutlery
- Display cases, refrigerated
- Drinking fountains
- Dust collection equipment
- Fasteners
- Fireplaces, gas
- Freezers, commercial-type
- Furnaces, warm air
- Handtools
- Ice making machines
- Keys and locks
- Plumbing supplies
- Power handtools
- Radiators
- Sheet metal duct work
- Sinks
- Spa equipment
- Staples
- Tacks
- Toilet bowls
- Urinals
- Ventilating equipment
- Water heaters, gas and electric

Machinery, Equipment, & Supplies Merchant Wholesalers

The Machinery, Equipment, & Supplies Merchant Wholesalers category has an LQ of **.57** and a 2022 employment figure of **118** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **89** jobs in this category, or about **12** new firms. Products typically include:

- Aircraft
- Amusement park equip.
- Animal feeders
- Beauty parlor equip. & supplies
- Boats (except pleasure)
- Car wash equip. & supplies
- Drycleaning equip. & supplies
- Excavating machinery & equip.
- Fluid power transmission equip.
- Food processing machinery & equip.
- Forestry machinery & equip.
- Harvesting machinery & equip.
- Industrial containers
- Industrial diamonds
- Industrial sand
- Janitorial equip. & supplies
- Lawnmowers
- Material handling machinery & equip.
- Metalworking machinery & equip.
- Milking machinery & equip.
- Motorized passenger golf carts
- Oil well machinery & equip.
- Planting machinery & equip.
- Printing inks
- Railroad cars
- Refractory materials
- Road const.& maint. machinery
- Scaffolding
- Ships
- Undertakers' equip. & supplies
- Upholsterers' equip. & supplies
- Voting machines
- Water treatment equip.
- Welding supplies

Miscellaneous Durable Goods Merchant Wholesalers

In the Miscellaneous Durable Goods Merchant Wholesalers category, there is no reported employment in Cape Coral, indicating this is a “missing” industry. To meet the 1.0 LQ threshold, we

would like to see the establishment of the industry by **98** jobs in the category, or **19** new facilities. Typical establishment size is about **5** persons and the type of products include:

- Antique jewelry
- Athletic goods
- Athletic uniforms
- Boats, pleasure
- Camping equipment
- Casino supplies
- Clocks
- Coins
- Costume jewelry
- Firearms (except sporting)
- Gemstones
- Gymnasium equipment
- Ingots, precious
- Luggage merchant wholesalers
- Marine supplies
- Monuments and grave markers
- Musical instruments
- Personal safety devices and supplies
- Playground equipment
- Prerecorded electronic media
- Recyclable materials
- Signs (except electrical)
- Silverware
- Sporting and recreational goods
- Swimming pools and equipment
- Timber and timber products
- Toy and hobby goods
- Trophies
- Watchcases
- Watches and parts

Public Administration

Government -- Emerging, Tier 1

Under the 3-Digit NAICS heading of Public Administration (900), there are three classifications of government employment:

- ❖ Federal government
- ❖ State government
- ❖ Local government

NAICS	Industry	2022 Empl.	2022 LQ	Target LQ	Target Empl.	Net Empl. Gain	FL. Avg. Size of Estbl.	Net Estb. Gain
9100	Federal Government	167*	0.19*	1.0	880	713	--	--
9200	State Government	328*	0.28*	1.0	1,207	879	--	--
9300	Local Government	2,455*	0.57*	1.0	4,499	2,044	--	--

Federal Government

The Federal Government category has an LQ of **.19** (**estimated*) and a 2022 employment (**estimated*) figure of **167** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **713** jobs in this category.

State Government

The State Government category has an LQ of **.28** (**estimated*) and 2022 employment (**estimated*) figure of **328** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **879** jobs in this category.

Local Government

The Local Government category has an LQ of **.57** (**estimated*) and 2022 employment (**estimated*) figure of **2,455** persons. To meet the 1.0 LQ threshold, we would like to see an increase in **2,044** jobs in this category.

****Estimates have been derived by applying the Lee County ratios of Federal, State, and Local government employment to the Cape Coral 2022 figure of 2,950 persons.***

There are no breakdowns by the US Census or Bureau of Labor Statistics on employment by National, State or Local government. However, the following categories are listed by the Census as belonging to Public Administration:

- | | | |
|---|--|---|
| • Agricultural Marketing & Commodities | • General Economic Programs | • Police Protection |
| • Air and Water Resource and Solid Waste Mgmt. Programs | • Housing Programs | • Public Finance Activities |
| • Communications, Electric, Gas, and Other Utilities | • Human Resource Programs | • Public Health Programs |
| • Conservation Programs | • International Affairs | • Regulation, Licensing, & Inspection of Misc. Commercial Sectors |
| • Correctional Institutions | • Legal Counsel & Prosecution | • Space Research & Technology |
| • Courts | • Legislative Bodies | • Transportation Programs |
| • Education Programs | • National Security | • Urban Planning and Community & Rural Development |
| • Executive & Legislative Offices, Combined | • Other General Government Support | • Veterans' Affairs |
| • Executive Offices | • Other Justice, Public Order, & Safety Activities | |
| • Fire Protection | • Parole Offices & Probation Offices | |

Summary of Preliminary Target Industries

From the above analysis, a total of **65** 4-digit NAICS industries have emerged as preliminary targets for Cape Coral in **11** major industry sectors. These industries represent the areas where the City should focus its marketing efforts as new opportunities for economic growth and expansion. The following table summarizes the research:

	Potential Empl. Gain
Retail Trade	
4411 Automobile Dealers	372
4452 Specialty Food Stores	6
4572 Fuel Dealers	11
4581 Clothing Stores	80
4582 Shoe Retailers	70
4591 Sporting Goods, Hobby, And Musical Instrument Retailers	147
4592 Book Retailers & News Dealers	19
4593 Florists	18
4595 Used Merchandise Stores	134
Subtotal	857
Financial Activities	
5221 Depository Credit Intermediation	759
5222 Nondepository Credit Intermediation	62
5223 Activities Related to Credit Intermediation	32
5231 Securities And Commodity Contracts Intermediation & Brokerage	140
5311 Lessors Of Real Estate	39
5313 Activities Related to Real Estate	58
5321 Automotive Equipment Rental & Leasing	49
Subtotal	1,139
Education, Healthcare & Social Services	
6211 Offices of Physicians	678
6212 Offices of Dentists	22
6213 Offices of Other Health Practitioners	14
6214 Outpatient Care Centers	103
6215 Medical & Diagnostic Laboratories	92
6216 Home Health Care Services	302
6219 Other Ambulatory Health Care Services	106
6221 General Medical & Surgical Hospitals	1,515
6222 Psychiatric & Substance Abuse Hospitals	45
6223 Specialty (Except Psychiatric & Substance Abuse) Hospitals	83
6241 Individual & Family Services	170
6242 Community Food & Housing, & Emergency & Other Relief Services	50

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6243	Vocational Rehabilitation Services	71
Subtotal		3,251

Manufacturing

3327	Machine Shops; Turned Product; & Screw, Nut, & Bolt Mfg.	30
3328	Coating, Engraving, Heat Treating, & Allied Activities	12
3329	Other Fabricated Metal Product Manufacturing	35
Subtotal		77

Information

5121	Motion Picture & Video Industries	68
5122	Sound Recording Industries	7
5132	Software Publishers	137
5161	Radio & Television Broadcasting Stations	37
5162	Media Streaming Distribution Services, Social Networks, & Other Media Networks & Content Providers	45
5174	Satellite Telecommunications	3
5178	All Other Telecommunications	11
Subtotal		308

Professional & Business Services

5411	Legal Services	222
5413	Architectural, Engineering, & Related Services	206
5415	Computer Systems Design & Related Services	397
5416	Management, Scientific, & Technical Consulting Services	274
5417	Scientific Research & Development Services	127
5418	Advertising, Public Relations, & Related Services	22
5611	Office Administrative Services	53
5612	Facilities Support Services	73
5613	Employment Services	1,476
5614	Business Support Services	359
5616	Investigation & Security Services	142
5619	Other Support Services	83
Subtotal		3,434

Tourism & Leisure

7223	Special Food Services	117
Subtotal		117

Other Services

8112	Electronic & Precision Equipment Repair & Maintenance	43
------	---	----

8113	Commercial & Industrial Machinery & Equipment (Except Automotive & Electronic) Repair & Maintenance	54
Subtotal		97

Wholesale Trade

4231	Motor Vehicle & Motor Vehicle Parts & Supplies Merchant Wholesalers	88
4233	Lumber & Other Construction Materials Merchant Wholesalers	69
4234	Professional & Commercial Equipment & Supplies Merchant Wholesalers	269
4235	Metal & Mineral (Except Petroleum) Merchant Wholesalers	25
4236	Household Appliances & Electrical & Electronic Goods Merchant Wholesalers	42
4237	Hardware, Plumbing & Heating Equipment & Supplies Merchant Wholesalers	44
4238	Machinery, Equipment, & Supplies Merchant Wholesalers	89
4239	Miscellaneous Durable Goods Merchant Wholesalers	98
Subtotal		724

Public Administration

9100	Federal Government	713
9200	State Government	879
9300	Local Government	2,044
Subtotal		3,636

*Note: Construction sector is eliminated

In total, these industries represent a potential employment gain of **13,640** new jobs, if even the LQ parity level of 1.0 is achieved for each category. Effective economic development applied in the attraction and recruitment of new companies in these areas should provide even greater employment results.

3.c – Cluster Mapping

Clusters Identification

As defined by Harvard University, “a cluster is a regional concentration of related industries in a particular location. Clusters are a striking feature of economies, making regions uniquely competitive for jobs and private investment. They consist of companies, suppliers, and service providers, as well as government agencies and other institutions that provide specialized training and education, information, research, and technical support⁴.”

DCG Corplan has developed a “mapping” technique whereby the 302 national industries in 4-digit NAICS format can be distilled to 27 cluster categories (channels) created from a “best practices” review of multiple cluster analyses from other US communities and states, cluster mapping white papers for the US Dept. of Commerce, the US Cluster Mapping Project from Harvard University, and primary-related industry taxonomies from numerous commercial enterprises. The clusters and the number of their corresponding 4-digit NAICS industries included in each category are shown in Exhibit 3.4 (below) and Appendix Exhibit 3.15 (multiple application occurs in many instances resulting in 350 matches):

Exhibit 3.4 – US Cluster Mapping by Number of Matched 4-digit NAICS Industries	
Cluster	# of Industries
Agriculture	21
Automotive	10
Aviation / Aerospace	4
Business Services	16
Chemicals	7
Computers & Electronic Equipment	5
Construction Services & Materials	28
Consumer Products	23
Consumer Services	13
Education	7
Energy & Utilities	13
Environmental Services	3
Financial Services	13
Food & Beverages	16
Health Care & Social Services	19

⁴ Dr. Michael Porter, Harvard Business School – US Cluster Mapping Project; <https://clustermapping.us/>

HQ & Management Operations	3
Industrial Products	35
Information & Media	12
Leisure & Tourism	15
Life Sciences	4
Metals & Mining	17
Not -For-Profits	5
Public Administration	3
Real Estate	3
Retail - Clothing & General Merchandise	18
Telecom Services & Equipment	4
Transportation	33
Total Number of Industry Matches	350

Utilizing the US Cluster Mapping methodology, Cape Coral's 65 4-digit target industries have been matched to **20** of the 27 cluster categories. The following table and Exhibit 3.5 (following) summarize the distribution of employment among the 20 cluster and the total potential employment gain of **13,929** jobs (*note: some industry repeats occur which raises the job gain from 13,640 to 13,929*).

Cluster	Potential Empl. Gain
Automotive	460
Business Services	2,578
Computers & Electronic Equipment	440
Construction Services & Materials	310
Consumer Products	453
Consumer Services	49
Energy & Utilities	11
Financial Services	993
Food & Beverages	6
Health Care & Social Services	3,251
HQ & Management Operations	126
Industrial Products	220
Information & Media	316
Leisure & Tourism	117
Life Sciences	219
Metals & Mining	25
Public Administration	3,636
Real Estate	97
Retail - Clothing & General Merchandise	608

Telecom Services & Equipment	14
Total	13,929

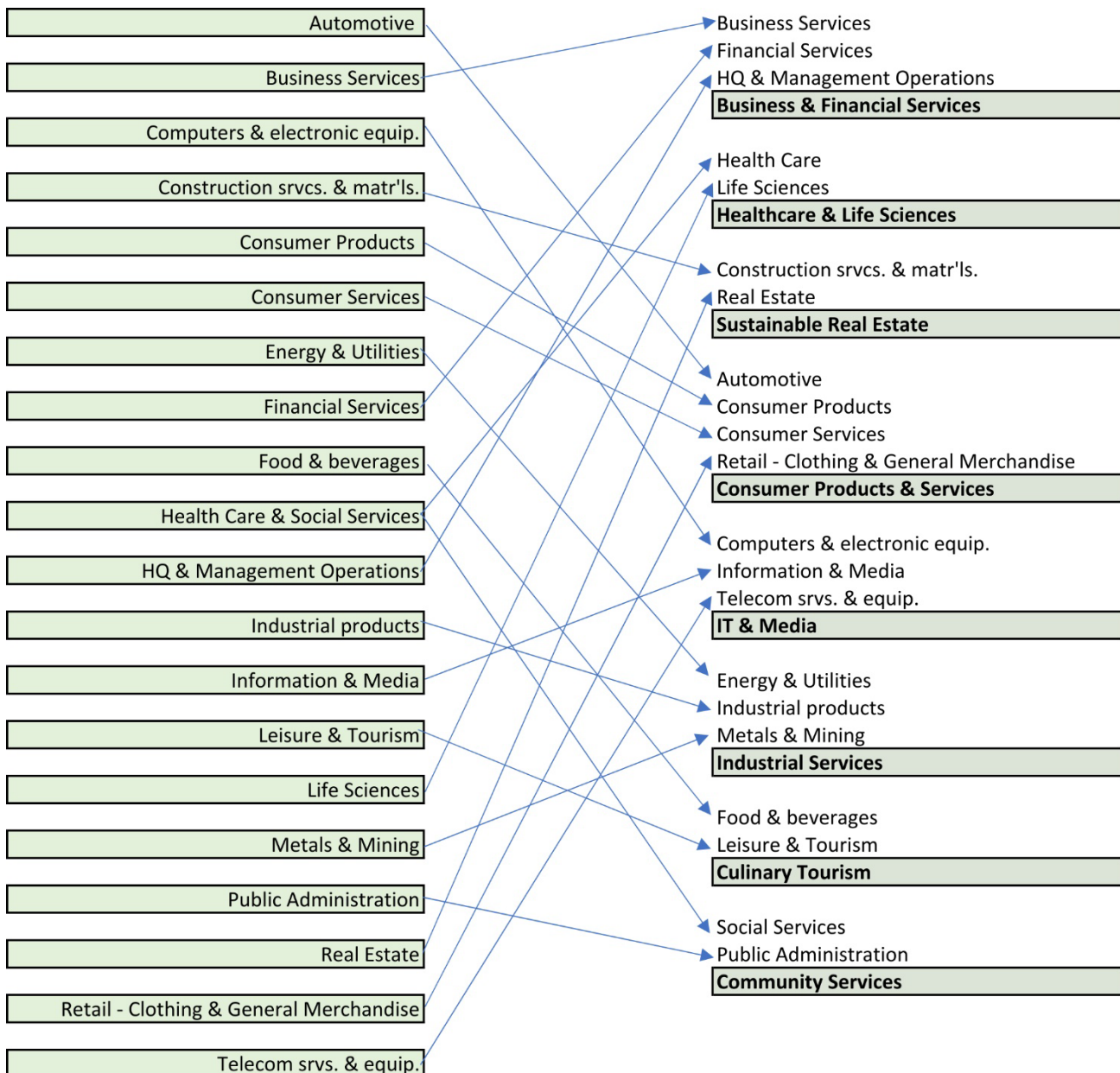
Exhibit 3.5 – Cape Coral Target Clusters and Component Industries		
NAICS	Industry	Pot'l. Emp. Gain
Automotive		
4231	Motor vehicle and motor vehicle parts and supplies merchant wholesalers	88
4411	Automobile dealers	372
	Subtotal	460
Business Services		
5411	Legal services	222
5416	Management, scientific, and technical consulting services	274
5418	Advertising, public relations, and related services	22
5613	Employment services	1,476
5614	Business support services	359
5616	Investigation and security services	142
5619	Other support services	83
	Subtotal	2,578
Computers & Electronic Equipment		
5415	Computer systems design and related services	397
8112	Electronic and precision equipment repair and maintenance	43
	Subtotal	440
Construction Services & Materials		
3329	Other fabricated metal product manufacturing	35
4233	Lumber and other construction materials merchant wholesalers	69
5413	Architectural, engineering, and related services	206
	Subtotal	310
Consumer Products		
4234	Professional and commercial equipment and supplies merchant wholesalers	269
4236	Household appliances and electrical and electronic goods merchant wholesalers	42
4237	Hardware, and plumbing and heating equipment and supplies merchant wholesalers	44
4239	Miscellaneous durable goods merchant wholesalers	98
	Subtotal	453
Consumer Services		
5321	Automotive equipment rental and leasing	49
	Subtotal	49
Energy & Utilities		
4572	Fuel dealers	11
	Subtotal	11
Financial Services		
5221	Depository credit intermediation	759
5222	Nondepository credit intermediation	62

5223	Activities related to credit intermediation	32
5231	Securities and commodity contracts intermediation and brokerage	140
Subtotal		993
Food & Beverages		
4452	Specialty food retailers	6
Subtotal		6
Health Care & Social Services		
6211	Offices of physicians	678
6212	Offices of dentists	22
6213	Offices of other health practitioners	14
6214	Outpatient care centers	103
6215	Medical and diagnostic laboratories	92
6216	Home health care services	302
6219	Other ambulatory health care services	106
6221	General medical and surgical hospitals	1,515
6222	Psychiatric and substance abuse hospitals	45
6223	Specialty (except psychiatric and substance abuse) hospitals	83
6241	Individual and family services	170
6242	Community food and housing, and emergency and other relief services	50
6243	Vocational rehabilitation services	71
Subtotal		3,251
HQ & Management Operations		
5611	Office administrative services	53
5612	Facilities support services	73
Subtotal		126
Industrial products		
3327	Machine shops; turned product; and screw, nut, and bolt manufacturing	30
3328	Coating, engraving, heat treating, and allied activities	12
3329	Other fabricated metal product manufacturing	35
4238	Machinery, equipment, and supplies merchant wholesalers	89
8113	Commercial and industrial machinery and equipment (except automotive and electronic) repair and maintenance	54
Subtotal		220
Information & Media		
5121	Motion picture and video industries	68
5122	Sound recording industries	7
5132	Software publishers	137
5161	Radio and television broadcasting stations	37
5162	Media streaming distribution services, social networks, and other media networks and content providers	45
5418	Advertising, public relations, and related services	22
Subtotal		316

Leisure & Tourism		
7223	Special food services	117
	Subtotal	117
Life Sciences		
5417	Scientific research and development services	127
6215	Medical and diagnostic laboratories	92
	Subtotal	219
Metals & Mining		
4235	Metal and mineral (except petroleum) merchant wholesalers	25
	Subtotal	25
Public Administration		
9100	Federal Government	713
9200	State Government	879
9300	Local Government	2,044
	Subtotal	3,636
Real Estate		
5311	Lessors of real estate	39
5313	Activities related to real estate	58
	Subtotal	97
Retail - Clothing & General Merchandise		
4236	Household appliances and electrical and electronic goods merchant wholesalers	42
4239	Miscellaneous durable goods merchant wholesalers	98
4581	Clothing and clothing accessories retailers	80
4582	Shoe retailers	70
4591	Sporting goods, hobby, and musical instrument retailers	147
4592	Book retailers and news dealers	19
4593	Florists	18
4595	Used merchandise retailers	134
	Subtotal	608
Telecom Services & Equipment		
5174	Satellite telecommunications	3
5178	All other telecommunications	11
	Subtotal	14

Final Cluster Selections

To determine the final cluster selections, a reexamination of the clusters identified to date is required. The following “crosswalk” graphic illustrates how rearrangement of the components leads to a logical selection of the final clusters:



For the final eight clusters, the 4-digit target industries are presented again in the table below, organized by cluster heading (note: no industry repeats occur in these groupings):

Business & Financial Services		
5221	Depository credit intermediation	759
5222	Nondepository credit intermediation	62
5223	Activities related to credit intermediation	32
5231	Securities and commodity contracts intermediation and brokerage	140
5411	Legal services	222
5416	Management, scientific, and technical consulting services	274
5611	Office administrative services	53
5612	Facilities support services	73
5613	Employment services	1,476
5614	Business support services	359
5616	Investigation and security services	142
5619	Other support services	83
	Subtotal	3,675
Healthcare & Life Sciences		
5417	Scientific research and development services	127
6211	Offices of physicians	678
6212	Offices of dentists	22
6213	Offices of other health practitioners	14
6214	Outpatient care centers	103
6215	Medical and diagnostic laboratories	92
6216	Home health care services	302
6219	Other ambulatory health care services	106
6221	General medical and surgical hospitals	1,515
6222	Psychiatric and substance abuse hospitals	45
6223	Specialty (except psychiatric and substance abuse) hospitals	83
	Subtotal	3,087
Sustainable Real Estate		
4233	Lumber and other construction materials merchant wholesalers	69
5311	Lessors of real estate	39
5313	Activities related to real estate	58
5413	Architectural, engineering, and related services	206
	Subtotal	372
Consumer Products & Services		
4231	Motor vehicle and motor vehicle parts and supplies merchant wholesalers	88
4234	Professional and commercial equipment and supplies merchant wholesalers	269
4236	Household appliances and electrical and electronic goods merchant wholesalers	42

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4237	Hardware, and plumbing and heating equipment and supplies merchant wholesalers	44
4239	Miscellaneous durable goods merchant wholesalers	98
4411	Automobile dealers	372
4581	Clothing and clothing accessories retailers	80
4582	Shoe retailers	70
4591	Sporting goods, hobby, and musical instrument retailers	147
4592	Book retailers and news dealers	19
4593	Florists	18
4595	Used merchandise retailers	134
5321	Automotive equipment rental and leasing	49
Subtotal		1,430
IT & Media		
5121	Motion picture and video industries	68
5122	Sound recording industries	7
5132	Software publishers	137
5161	Radio and television broadcasting stations	37
5162	Media streaming distribution services, social networks, and other media networks and content providers	45
5174	Satellite telecommunications	3
5178	All other telecommunications	11
5415	Computer systems design and related services	397
5418	Advertising, public relations, and related services	22
8112	Electronic and precision equipment repair and maintenance	43
Subtotal		770
Industrial Services		
3327	Machine shops; turned product; and screw, nut, and bolt manufacturing	30
3328	Coating, engraving, heat treating, and allied activities	12
3329	Other fabricated metal product manufacturing	35
4235	Metal and mineral (except petroleum) merchant wholesalers	25
4238	Machinery, equipment, and supplies merchant wholesalers	89
4572	Fuel dealers	11
8113	Commercial and industrial machinery and equipment (except automotive and electronic) repair and maintenance	54
Subtotal		256
Culinary Tourism		
4452	Specialty food retailers	6
7223	Special food services	117
Subtotal		123
Community Services		
6241	Individual and family services	170

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6242	Community food and housing, and emergency and other relief services	50
6243	Vocational rehabilitation services	71
9100	Federal Government	713
9200	State Government	879
9300	Local Government	2,044
Subtotal		3,927
Total		13,640

As a means of determining a strategic approach toward target industry recruitment and attraction, the eight Cape Coral clusters are ranked by potential job gains as shown below. The four leading categories account for nearly 90% of all future employment growth and should become the focus of economic development initiatives going forward:

Cluster	Pot'l. Emp. Gain
Community Services	3,927
Business & Financial Services	3,675
Healthcare & Life Sciences	3,378
Consumer Products & Services	1,430
IT & Media	770
Sustainable Real Estate	372
Industrial Services	256
Culinary Tourism	123
Total	13,640
median	1,100
Leading clusters emp.	12,119
Leading clusters emp. %	89%

3.d – Operational Analysis

The operational models presented in the following section provide a roadmap for creating a marketing opportunity for the City of Cape Coral to prospective employers. In summary, the four leading cluster representative industries could generate nearly **\$84 million** in new investment.

For typical company operations, we have selected business in each of the four clusters as indicative of the category. These are as follows:

- Business & Financial Services cluster: **Business-to-business call center**
- Healthcare & Life Sciences: **Medical laboratory**
- Consumer Products & Services cluster: **Photographic & computer equipment wholesale**
- Community Services cluster: **Florida State agency**

The following table summarizes the data evaluated in the operational models:

Cluster	Selected Component Industry	Selected Detailed Industry	Total New Jobs	Annual Output per Employee	Investment per Employee	Total Investment	Industry Profitability (Cape Coral)
Business & Financial Services	Business Support Services	Business-Business Call Center	359	\$113,000	\$30,200	\$10,841,800	7.9%
Healthcare & Life Sciences	Medical & Diagnostic Laboratories	Medical Laboratory	92	\$238,000	\$323,600	\$29,771,200	6.6%
Consumer Products & Services	Miscellaneous Durable Goods Merchant Wholesalers	Photographic & Computer Equipment Wholesale	98	\$946,000	\$167,200	\$16,386,000	11.7%
Community Services	State Government	Vocational Rehabilitation Services Agency	879	115400	\$30,700	\$26,985,300	3.9%
Total Investment						\$83,984,300	

Business & Financial Services Cluster: Business-to-Business Call Center

In development of the Business & Financial Services Cluster, a projection of **3,675** new employees in **12** NAICS four-digit industries classifications was established:

Business & Financial Services Cluster		
NAICS	Industry	# of New Jobs
5221	Depository credit intermediation	759
5222	Nondepository credit intermediation	62
5223	Activities related to credit intermediation	32
5231	Securities and commodity contracts intermediation and brokerage	140
5411	Legal services	222
5416	Management, scientific, and technical consulting services	274
5611	Office administrative services	53
5612	Facilities support services	73
5613	Employment services	1,476
5614	Business support services	359
5616	Investigation and security services	142
5619	Other support services	83
Subtotal		

For exploratory purposes, we have selected **NAICS 5614 - Business Support Services** for deeper examination. For this industry category, we projected the growth of **359** new jobs. Within this heading are **6** sub-categories of industries (NAICS 5-digit), one of which we will explore in greater detail.

- Document Preparation Services
- **Telephone Call Centers**
- Business Service Centers
- Collection Agencies
- Credit Bureaus
- Other Business Support Services

561422 – Business-to-Business (B2B) Telephone Call Centers

This U.S. industry comprises establishments primarily engaged in operating call centers that initiate or receive communications via telephone, facsimile, email, or other communication modes for purposes such as: (1) promoting products or services, (2) taking orders, (3) soliciting contributions, and (4) providing information or assistance regarding products or services. Telemarketing bureaus and other contact centers provide these services on behalf of clients and do not own the products or provide the services that they are representing, or they serve other establishments of the same enterprise.

Profitability Determination

The national average size for a Business-to-Business (B2B) Call Center typical facility is **36** persons, and the State of Florida's is **50** persons. A nominal (averaged) facility size of **43** persons is selected as a Cape Coral model for this industry. Average productivity output for NAICS 5614 - Business Support Services is **\$113,000** per employee. Total investment per employee is estimated at **\$30,200**, and with the projected gain of **359** new jobs in the industry in Cape Coral, this category could produce an investment of total of **\$10,841,800** for the City.

Typical B2B Call Center Facility	
Annual Net sales	\$4,859,000
Total Employment	43
Avg. hourly Wage	\$22.08
Fringe benefits Percentage	35%
Total Payroll	\$2,665,600
Facility Footprint sq. ft.	7,711
Employee Occupancy/sf	180
Floor-Area-Ratio	0.37
Facility Construction Cost/sq. ft.	\$119
Facility Construction Cost	\$920,000
Estimated Furniture, Fixtures & Equipment Cost	\$240,000
Site Acreage	0.5
Land Cost	\$140,000
Total Investment	\$1,300,000

Employment distribution among the relevant major occupational groups for the industry are shown as follows:

B2B Call Center – Employee Census			
Occupation	# of Jobs	Florida Avg. Hrly Wage	Cape Coral Avg. Hrly Wage
General and Operations Managers	2	\$54.50	\$51.74
Training and Development Specialists	1	\$32.04	\$30.52
Business Operations Specialists, All Other	1	\$34.51	\$31.00
Computer User Support Specialists	1	\$27.28	\$27.26
Counter and Rental Clerks	1	\$17.42	\$16.44
Sales Representatives of Services	2	\$32.15	\$29.47
Telemarketers	4	\$15.07	\$16.95
First-Line Supervisors of Office and Administrative Support Workers	3	\$30.64	\$30.29
Bill and Account Collectors	4	\$19.89	\$20.16
Customer Service Representatives	21	\$18.66	\$18.46
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	1	\$19.32	\$18.53
Mail Clerks and Mail Machine Operators, Except Postal Service	1	\$16.63	\$16.71
Office Clerks, General	1	\$19.35	\$19.43
Total	43		
Average Hourly Wage		\$22.41	\$22.08

Base financial information is as follows:

B2B Call Center – Competitive Evaluation – Base Financial Data							
Market	Cost/Acre	Land Cost	Facility Cost/SF	Facility Cost	Total Investment	Financing	Debt Service
Cape Coral	\$295,000	\$147,000	\$119	\$1,160,000	\$1,307,000	\$1,045,600	\$82,200
Fort Lauderdale	\$1,437,000	\$716,000	\$125	\$1,202,000	\$1,918,000	\$1,534,400	\$120,600
Orlando	\$201,000	\$100,000	\$123	\$1,188,000	\$1,288,000	\$1,030,400	\$81,000
Palm Bay	\$494,000	\$246,000	\$130	\$1,243,000	\$1,489,000	\$1,191,200	\$93,600
Pompano Beach	\$2,057,000	\$1,025,000	\$125	\$1,202,000	\$2,227,000	\$1,781,600	\$140,000
Port St. Lucie	\$146,000	\$73,000	\$121	\$1,176,000	\$1,249,000	\$999,200	\$78,500
West Palm Beach	\$975,000	\$486,000	\$125	\$1,202,000	\$1,688,000	\$1,350,400	\$106,100

Profitability for a B2B Call Center in Cape Coral is **7.9%** which leads all competition:

B2B Call Centers – Competitive Evaluation – Annual Operating Profits							
Market	Cape Coral	Fort Lauderdale	Orlando	Palm Bay	Pompano Beach	Port St. Lucie	West Palm Beach
Net Sales	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Payroll	54.9%	57.8%	55.4%	55.7%	57.8%	53.3%	57.8%
Utilities & Fuels	8.0%	10.0%	8.7%	10.0%	10.1%	10.0%	10.0%
Debt Service	1.7%	2.5%	1.7%	1.9%	2.9%	1.6%	2.2%
Cost of goods sold	64.6%	70.3%	65.8%	67.6%	70.8%	64.9%	70.0%
Annual Gross profit	35.4%	29.7%	34.2%	32.4%	29.2%	35.1%	30.0%
Less: Sales exp.	7.5%	7.5%	7.5%	7.5%	7.5%	7.5%	7.5%
General & Administrative. Overhead	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%
Total Operating expenses	27.5%	27.5%	27.5%	27.5%	27.5%	27.5%	27.5%
Annual Net Profit before taxes	7.9%	2.2%	6.7%	4.9%	1.7%	7.6%	2.5%

Labor Capability

To verify if labor capability exists in the Cape Coral area to support B2B Call Centers, a review of the work force of the Cape Coral-Fort Myers Metropolitan Statistical Area (MSA) is necessary, as new applicants could commute from anywhere in the MSA. Available labor is calculated by using both the current unemployment rates for the MSA (U3) factored by the U6 under-employment rate⁵ from the Bureau of Labor Statistics. For the Cape Coral-Fort Myers MSA, the November 2023 U3 unemployment rate was **3.1%**. By use of a U6 factor derived from the US November 2023 U3 and U6 rates, the true unemployment rate for the MSA can be established at **5.9%**, as shown below:

US	US	Cape Coral-Fort Myers FL MSA
Nov. '23 U3:	3.3%	3.1%
Nov. '23 U6:	6.5%	5.9%
Factor:	1.91	

⁵ U6: Total unemployed, plus all persons marginally attached to the labor force, plus total employed part time for economic reasons, as a percent of the civilian labor force plus all persons marginally attached to the labor force.

With the target of **359** new jobs, the Employee Census table from above is revisited with the new job requirements shown:

B2B Call Centers – Occupations Needed		
Occ. Code	Occupation	# of new jobs
43-4051	Customer Service Representatives	182
41-9041	Telemarketers	41
43-3011	Bill and Account Collectors	35
43-1011	First-Line Supervisors of Office and Administrative Support Workers	24
41-3091	Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel	16
11-1021	General and Operations Managers	14
43-9061	Office Clerks, General	9
41-2021	Counter and Rental Clerks	8
15-1232	Computer User Support Specialists	8
43-9051	Mail Clerks and Mail Machine Operators, Except Postal Service	7
13-1151	Training and Development Specialists	6
13-1199	Business Operations Specialists, All Other	5
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	5
Total Occupations Required		359

In the following, the thirteen categories of staffing for B2B Call Centers are evaluated for direct hiring capabilities:

43-4051 - Customer Service Representatives

In the Cape Coral-Fort Myers MSA, there are currently **7,480** persons employed in this position. Using the U6 factor of 5.9%, it is estimated that there are approximately **440** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

41-9041 - Telemarketers

In the MSA, there are currently **170** persons employed in this position. It is estimated that there are approximately **10** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Problematic** for this position, requiring some external recruitment of applicants or retraining of others in the market area.

43-3011 - Bill and Account Collectors

In the MSA, there are currently **160** persons employed in this position. It is estimated that there are approximately **9** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Problematic** for this position, requiring some external recruitment of applicants or retraining of others in the market area.

43-1011 - First-Line Supervisors of Office and Administrative Support Workers

In the MSA, there are currently **2,790** persons employed in this position. It is estimated that there are approximately **166** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

41-3091 - Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel

In the MSA, there are currently **2,900** persons employed in this position. It is estimated that there are approximately **172** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

11-1021 - General and Operations Managers

In the MSA, there are currently **5,270** persons employed in this position. It is estimated that there are approximately **313** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

43-9061 - Office Clerks, General

In the MSA, there are currently **6,300** persons employed in this position. It is estimated that there are approximately **374** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

41-2021 - Counter and Rental Clerks

In the MSA, there are currently **1,590** persons employed in this position. It is estimated that there are approximately **94** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

15-1232 - Computer User Support Specialists

In the MSA, there are currently **1,020** persons employed in this position. It is estimated that there are approximately **61** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

43-9051 - Mail Clerks and Mail Machine Operators, Except Postal Service

In the MSA, there are currently **70** persons employed in this position. It is estimated that there are approximately **4** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Problematic** for this position, requiring some external recruitment of applicants or retraining of others in the market area.

13-1151 - Training and Development Specialists

In the MSA, there are currently **530** persons employed in this position. It is estimated that there are approximately **31** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

13-1199 - Business Operations Specialists, All Other

In the MSA, there are currently **1,180** persons employed in this position. It is estimated that there are approximately **70** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

43-6014 - Secretaries and Administrative Assistants, Except Legal, Medical, and Executive

In the MSA, there are currently **2,990** persons employed in this position. It is estimated that there are approximately **177** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Conclusion

In summary, the positions that exhibit shortfall for B2B Call Centers are:

- Telemarketers
- Bill and Account Collectors
- Mail Clerks and Mail Machine Operators, Except Postal Service

We will address training and educational strategies to address these jobs in the Task 10 – Workforce Analysis/Developments section.

Healthcare & Life Sciences Cluster: Medical Laboratory

In development of the Healthcare & Life Sciences Cluster, a projection of **3,087** new employees in **11** NAICS four-digit industries classifications was established:

Healthcare & Life Sciences Cluster		
NAICS	Industry	# of New Jobs
5417	Scientific research and development services	127
6211	Offices of physicians	678
6212	Offices of dentists	22
6213	Offices of other health practitioners	14
6214	Outpatient care centers	103
6215	Medical and diagnostic laboratories	92
6216	Home health care services	302
6219	Other ambulatory health care services	106
6221	General medical and surgical hospitals	1,515
6222	Psychiatric and substance abuse hospitals	45
6223	Specialty (except psychiatric and substance abuse) hospitals	83
Subtotal		3,378

For exploratory purposes, we have selected **NAICS 6215 – Medical & Diagnostic Laboratories** for deeper examination. For this industry category, we projected the growth of **92** new jobs. Within this heading are **2** NAICS 5-digit sub-categories, one of which we will explore in greater detail.

Medical laboratories

- Bacteriological laboratories
- Biological laboratories
- Blood analysis laboratories
- DNA testing laboratories
- Forensic laboratories
- Pathology analysis laboratories
- Toxicology health laboratories
- Urinalysis laboratories

Diagnostic laboratories

- CT-SCAN centers
- Dental X-ray laboratories
- Magnetic resonance imaging
- Mammogram centers
- Medical X-ray laboratories
- Mobile breast imaging centers
- Mobile X-ray facilities
- Radiological laboratories

62151 – Medical Laboratories

This U.S. industry comprises establishments known as Blood analysis laboratories primarily engaged in providing analytic or diagnostic services, including body fluid analysis, generally to the medical profession or to the patient on referral from a health practitioner. The national average size for a typical facility is **11** persons, and the State of Florida's is **12** persons. A nominal facility size of **12** persons is selected as a Cape Coral model for this industry. Average productivity output for NAICS 6215 - Medical & Diagnostic Laboratories is **\$238,000** per employee. Total investment per employee is estimated at **\$323,600**, and with the projected gain of **92** new jobs in the industry in Cape Coral, this category could produce an investment of total of **\$29,771,200** for the City.

Typical Medical Laboratory Facility	
Annual Net sales	\$2,786,000
Total Employment	12
Avg. hourly Wage	\$31.10
Fringe benefits Percentage	35%
Total Payroll	\$1,048,000
Facility Footprint sq. ft.	6,790
Employee Occupancy/sf	580
Floor-Area-Ratio	0.39
Facility Construction Cost/sq. ft.	\$357
Facility Construction Cost	\$2,427,000
Estimated Equipment Cost	\$1,214,000
Site Acreage	0.5
Land Cost	\$147,500
Total Investment	\$3,788,500

Employment distribution among the relevant major occupational groups for the industry are shown as follows:

Medical Laboratories – Employee Census			
Occupation	# of Jobs	Florida Avg. Hrly Wage	Cape Coral Avg. Hrly Wage
Medical and Health Services Managers	1	\$57.46	\$61.38
Medical Scientists, Except Epidemiologists	1	\$47.67	\$47.67
Clinical Laboratory Technologists and Technicians	3	\$26.67	\$30.76
Diagnostic Medical Sonographers	1	\$35.63	\$37.93

Radiologic Technologists and Technicians	1	\$29.94	\$31.13
Phlebotomists	2	\$18.07	\$18.37
Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel	1	\$35.15	\$29.47
Customer Service Representatives	1	\$18.66	\$18.46
Medical Secretaries and Administrative Assistants	1	\$18.04	\$18.15
Total	12		
Average Hourly Wage		\$29.89	\$31.10

Base financial information is as follows:

Medical Laboratories – Competitive Evaluation – Base Financial Data							
Market	Cost/Acre	Land Cost	Facility Cost/SF	Facility Cost	Total Investment	Financing	Debt Service
Cape Coral	\$295,000	\$147,500	\$357	\$2,427,000	\$3,788,500	\$3,030,800	\$238,100
Fort Lauderdale	\$1,437,000	\$718,500	\$374	\$2,537,000	\$4,469,500	\$3,575,600	\$280,900
Orlando	\$201,000	\$100,500	\$368	\$2,500,000	\$3,814,500	\$3,051,600	\$239,800
Palm Bay	\$494,000	\$247,000	\$390	\$2,647,000	\$4,108,000	\$3,286,400	\$258,200
Pompano Beach	\$2,057,000	\$1,028,500	\$374	\$2,537,000	\$4,779,500	\$3,823,600	\$300,400
Port St. Lucie	\$146,000	\$73,000	\$364	\$2,470,000	\$3,757,000	\$3,005,600	\$236,200
West Palm Beach	\$975,000	\$487,500	\$374	\$2,537,000	\$4,238,500	\$3,390,800	\$266,400

Profitability for Medical Laboratories in Cape Coral are **6.6%**, but with notable competition with Orlando and Port St. Lucie:

Medical Laboratories – Competitive Evaluation – Annual Operating Profits							
Market	Cape Coral	Fort Lauderdale	Orlando	Palm Bay	Pompano Beach	Port St. Lucie	West Palm Beach
Net Sales	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
Payroll	37.6%	36.1%	34.1%	33.8%	36.1%	32.6%	36.1%
Utilities & Fuels	17.2%	21.6%	18.7%	21.6%	21.7%	21.6%	21.6%
Debt Service	8.5%	10.1%	8.6%	9.3%	10.8%	8.5%	9.6%
Cost of goods sold	70.9%	75.2%	68.9%	72.1%	76.1%	70.2%	74.7%
Annual Gross profit	29.1%	24.8%	31.1%	27.9%	23.9%	29.8%	25.3%
Less: Sales exp.	8.5%	8.5%	8.5%	8.5%	8.5%	8.5%	8.5%
General & Administrative Overhead	14.0%	14.0%	14.0%	14.0%	14.0%	14.0%	14.0%

Total Operating expenses	22.5%	22.5%	22.5%	22.5%	22.5%	22.5%	22.5%
Annual Net Profit before taxes	6.6%	2.3%	8.6%	5.4%	1.4%	7.3%	2.8%

Labor Capability

To verify if labor capability exists in the Cape Coral area to support Medical laboratories, a review of the work force of the Cape Coral-Fort Myers MSA is required, as new applicants could commute from locations in the MSA. With the target of **92** new jobs, the Employee Census table from above is revisited with the new job requirements shown:

Medical Laboratories – Occupations Needed		
Occ. Code	Occupation	# of new jobs
11-9111	Medical and Health Services Managers	8
19-1042	Medical Scientists, Except Epidemiologists	8
29-2010	Clinical Laboratory Technologists and Technicians	23
29-2032	Diagnostic Medical Sonographers	8
29-2034	Radiologic Technologists and Technicians	8
31-9097	Phlebotomists	15
41-3091	Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel	8
43-4051	Customer Service Representatives	8
43-6013	Medical Secretaries and Administrative Assistants	8
	Total Occupations Required	92

In the following, the nine categories of staffing for Medical Laboratories are evaluated for direct hiring capabilities:

11-9111 - Medical and Health Services Managers

In the Cape Coral-Fort Myers MSA, there are currently **840** persons employed in this position. Using the U6 factor of 5.9%, it is estimated that there are approximately **50** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

19-1042 - Medical Scientists, Except Epidemiologists

In MSA, there are currently **40** persons employed in this position. It is estimated that there are approximately **2** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Problematic** for this position, requiring some external recruitment of applicants or retraining of others in the market area.

29-2010 - Clinical Laboratory Technologists and Technicians

In MSA, there are currently **570** persons employed in this position. It is estimated that there are approximately **34** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

29-2032 - Diagnostic Medical Sonographers

In the MSA, there are currently **200** persons employed in this position. It is estimated that there are approximately **12** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

29-2034 - Radiologic Technologists and Technicians

In the MSA, there are currently **470** persons employed in this position. It is estimated that there are approximately **28** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

31-9097 - Phlebotomists

In the s MSA, there are currently **150** persons employed in this position. It is estimated that there are approximately **9** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Problematic** for this position, requiring some external recruitment of applicants or retraining of others in the market area.

41-3091 - Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel

In the MSA, there are currently **2,900** persons employed in this position. It is estimated that there are approximately **172** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

43-4051 - Customer Service Representatives

In the MSA, there are currently **7,480** persons employed in this position. It is estimated that there are approximately **444** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

43-6013 - Medical Secretaries and Administrative Assistants

In the MSA, there are currently **2,050** persons employed in this position. It is estimated that there are approximately **122** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Conclusion

In summary, the positions that exhibit shortfall for B2B Call Centers are:

- Medical Scientists, Except Epidemiologists
- Phlebotomists

We will address training and educational strategies to address these jobs in the Task 10 – Workforce Analysis/Developments section.

Consumer Products & Services Cluster: Sporting and Rec'l. Goods & Supplies Merchant Wholesalers

In development of the Consumer Products & Services Cluster, a projection of **1,430** new employees in **13** NAICS four-digit industries classifications was established:

Consumer Products & Services Cluster		
NAICS	Industry	# of New Jobs
4231	Motor vehicle and motor vehicle parts and supplies merchant wholesalers	88
4234	Professional and commercial equipment and supplies merchant wholesalers	269
4236	Household appliances and electrical and electronic goods merchant wholesalers	42
4237	Hardware, and plumbing and heating equipment and supplies merchant wholesalers	44
4239	Miscellaneous durable goods merchant wholesalers	98
4411	Automobile dealers	372

4581	Clothing and clothing accessories retailers	80
4582	Shoe retailers	70
4591	Sporting goods, hobby, and musical instrument retailers	147
4592	Book retailers and news dealers	19
4593	Florists	18
4595	Used merchandise retailers	134
5321	Automotive equipment rental and leasing	49
Subtotal		1,430

For exploratory purposes, we have selected **NAICS 4239 – Miscellaneous Durable Goods Merchant Wholesalers** for deeper examination. For this industry category, we projected the growth of **98** new jobs. Within this heading are **5** sub-categories of industries (NAICS 5-diigit), one of which we will explore in greater detail.

- **Sporting and Recreational Goods and Supplies Merchant Wholesalers**
 - Toy and Hobby Goods and Supplies Merchant Wholesalers
 - Recyclable Material Merchant Wholesalers
 - Jewelry, Watch, Precious Stone, and Precious Metal Merchant Wholesalers
 - Other Miscellaneous Durable Goods Merchant Wholesalers

42391 - Sporting and Recreational Goods and Supplies Merchant Wholesalers

This industry comprises establishments primarily engaged in the merchant wholesale distribution of sporting goods and accessories; billiard and pool supplies; sporting firearms and ammunition; and/or marine pleasure craft, equipment, and supplies. The national average size for a typical facility is **8** persons, and the State of Florida's is **6** persons. A nominal facility size of **7** persons is selected as a Cape Coral model for this industry. Average productivity output for NAICS 4239 – Miscellaneous Durable Goods Merchant Wholesalers is **\$946,000** per employee. Total investment per employee is estimated at **\$167,200**, and with the projected gain of **98** new jobs in the industry in Cape Coral, this category could produce an investment of total of **\$16,386,000** for the City.

Typical Sporting and Recr'l. Goods & Supplies Wholesaler	
Annual Net sales	\$6,647,000
Total Employment	7
Avg. hourly Wage	\$27.33
Fringe benefits Percentage	35%
Total Payroll	\$537,200
Facility Footprint sq. ft.	10,540
Employee Occupancy/sf	1,500

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Floor-Area-Ratio	0.25
Facility Construction Cost/sq. ft.	\$69
Facility Construction Cost	\$730,000
Estimated Equipment Cost	\$159,000
Site Acreage	1.0
Land Cost	\$286,000
Total Investment	\$1,175,000

Employment distribution among the relevant major occupational groups for the industry are shown as follows:

Sporting and Recr'l. Goods & Supplies Wholesaler – Employee Census			
Occupation	# of Jobs	Florida Avg. Hrly Wage	Cape Coral Avg. Hrly Wage
Sales Representatives, Wholesale	2	\$34.40	\$33.41
Laborers and Freight, Stock, and Material Movers, Hand	1	\$16.74	\$16.72
General and Operations Managers	1	\$54.50	\$51.54
Stockers and Order Fillers	1	\$16.07	\$15.46
Heavy and Tractor-Trailer Truck Drivers	1	\$23.89	\$22.84
Shipping, Receiving, and Inventory Clerks	1	\$18.19	\$17.93
Total	7		
Average Hourly Wage		\$28.31	\$27.33

Base financial information is as follows:

Sporting and Recr'l. Goods & Supplies Wholesaler – Competitive Evaluation – Base Financial Data							
Market	Cost/Acre	Land Cost	Facility Cost/SF	Facility Cost	Total Investment	Financing	Debt Service
Cape Coral	\$295,000	\$286,000	\$69	\$730,000	\$1,175,000	\$940,000	\$73,900
Fort Lauderdale	\$1,437,000	\$1,391,000	\$73	\$769,000	\$2,319,000	\$1,855,200	\$145,800
Orlando	\$201,000	\$195,000	\$71	\$752,000	\$1,106,000	\$884,800	\$69,500
Palm Bay	\$494,000	\$478,000	\$76	\$796,000	\$1,433,000	\$1,146,400	\$90,100
Pompano Beach	\$2,057,000	\$1,991,000	\$73	\$769,000	\$2,919,000	\$2,335,200	\$183,500
Port St. Lucie	\$146,000	\$141,000	\$76	\$796,000	\$1,096,000	\$876,800	\$68,900
West Palm Beach	\$975,000	\$944,000	\$76	\$796,000	\$1,899,000	\$1,519,200	\$119,400

Profitability for Sporting and Recreational Goods & Supplies Wholesalers in Cape Coral are **11.7%**, leading all competition but with notable competition with Orlando.

Sporting and Recr'l. Goods & Supplies Wholesaler Competitive Evaluation – Annual Operating Profits							
Market	Cape Coral	Fort Lauderdale	Orlando	Palm Bay	Pompano Beach	Port St. Lucie	West Palm Beach
Net Sales	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Payroll	37.6%	36.1%	34.1%	33.8%	36.1%	32.6%	36.1%
Utilities & Fuels	21.0%	26.3%	22.9%	26.3%	26.5%	26.3%	26.3%
Debt Service	2.7%	5.2%	2.5%	3.2%	6.6%	2.5%	4.3%
Cost of goods sold	61.3%	67.6%	59.5%	63.3%	69.2%	61.4%	66.7%
Annual Gross profit	38.7%	32.4%	40.5%	36.7%	30.8%	38.6%	33.3%
Less: Sales exp.	11.0%	11.0%	11.0%	11.0%	11.0%	11.0%	11.0%
General & Administrative. Overhead	16.0%	16.0%	16.0%	16.0%	16.0%	16.0%	16.0%
Total Operating expenses	27.0%	27.0%	27.0%	27.0%	27.0%	27.0%	27.0%
Annual Net Profit before taxes	11.7%	5.4%	13.5%	9.7%	3.8%	11.6%	6.3%

Labor Capability

To verify if labor capability exists in the Cape Coral area to support Sporting and Recreational Goods and Supplies Merchant Wholesalers, a review of the work force of the Cape Coral-Fort Myers MSA is required, as new applicants could commute from locations in the MSA. With the target of **98** new jobs, the Employee Census table from above is revisited with the new job requirements shown:

Sporting & Recreational Goods & Supplies Wholesaler – Occupations Needed		
Occ. Code	Occupation	# of new jobs
41-4012	Sales Representatives, Wholesale	28
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	14
11-1021	General and Operations Managers	14
53-7065	Stockers and Order Fillers	14
53-3032	Heavy and Tractor-Trailer Truck Drivers	14
43-5071	Shipping, Receiving, and Inventory Clerks	14
	Total Occupations Required	98

In the following, the six categories of staffing for Sporting & Recreational Goods & Supplies Wholesalers are evaluated for direct hiring capabilities:

41-4012 - Sales Representatives, Wholesale

In the Cape Coral-Fort Myers MSA, there are currently **2,320** persons employed in this position. Using the U6 factor of 5.9%, it is estimated that there are approximately **138** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

53-7062 - Laborers and Freight, Stock, and Material Movers, Hand

In the MSA, there are currently **3,220** persons employed in this position. It is estimated that there are approximately **191** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

11-1021 - General and Operations Managers

In the MSA, there are currently **5,270** persons employed in this position. It is estimated that there are approximately **313** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

53-7065 - Stockers and Order Fillers

In the MSA, there are currently **5,710** persons employed in this position. It is estimated that there are approximately **339** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

53-3032 - Heavy and Tractor-Trailer Truck Drivers

In the MSA, there are currently **2,450** persons employed in this position. It is estimated that there are approximately **145** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

43-5071 - Shipping, Receiving, and Inventory Clerks

In the MSA, there are currently **1,110** persons employed in this position. It is estimated that there are approximately **66** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Conclusion

In summary, we do not foresee any positions that exhibit shortfall for Sporting and Recreational Goods and Supplies Merchant Wholesalers. For a potential Cape Coral location, we expect that wholesalers will not experience any significant labor shortages.

Community Services Cluster: State Agencies

Since neither the US Census nor the Bureau of Labor Statistics publish employment data on public administration, building an operational model in this category is difficult. In Lee County, the State of Florida operates **50** leased office locations for **19** State Agencies. In total, this covers **312,851 sf** of office space. Only **4** of the 19 agencies have a presence in Cape Coral, accommodating only **7,049 sf** or **2%** of the State's footprint in the county⁶, as shown in the table below:

Agency	Lee County Area sf	Cape Coral Area sf
Department of Management Services	176,113	
Department of Law Enforcement	43,024	
Department of Revenue	14,365	
Department of Financial Services	13,631	
Department of Health	11,938	
Department of Highway Safety and Motor Vehicles	10,000	
Department of Education	7,458	100
Department of Juvenile Justice	7,275	6,427
Division of Administrative Hearings	7,097	
Department of the Lottery	6,400	
Department of Agriculture and Consumer Services	5,382	300
Department of Legal Affairs	5,181	
Fish And Wildlife Conservation Commission	1,997	
Auditor General	1,124	
Department of Economic Opportunity	1,008	
Department of Business and Professional Regulation	336	
Department of Veterans' Affairs	222	222
Executive Office of the Governor	200	
Department of Children and Families	100	
Total Office Floor area sf	312,851	7,049

⁶ State of Florida Land and Facilities Search; Dept. of Environmental Protection;
<https://prodenv.dep.state.fl.us/DslPi/searchStateFacilityLeaseNew.action>

Number of agencies	19	4
Cape Coral's Share of State Agencies Footprint in Lee County		2%

With the goal of growing state government employment in Cape Coral by **879** jobs, new office space is required of the size to accommodate the staff. At the rate of **180 sf** per employee, an industry standard for government office occupancy⁷, that would result in the opportunity to construct **158,200 sf** of new office space.

Vocational Rehabilitation Services

Although a government operation, the metric for this industry comes from the private sector. The private non-profit Vocational Rehabilitation Services industry comprises (1) establishments primarily engaged in providing vocational rehabilitation or habilitation services, such as job counseling, job training, and work experience, to unemployed and underemployed persons, persons with disabilities, and persons who have a job market disadvantage because of lack of education, job skill, or experience and (2) establishments primarily engaged in providing training and employment to persons with disabilities. The national average size for a typical facility is 18 persons, and the State of Florida's is 21 persons. A nominal facility size of **20** persons is selected as a Cape Coral model for this industry. Average non-profit output is estimated at **\$115,400** per employee. Total investment per employee is estimated at **\$30,700**, and with the projected gain of **879** new jobs in the industry in Cape Coral, this category could produce an investment of total of **\$26,985,300** for the City.

Typical Vocational Rehabilitation Services Agency	
State Budget Stipend	\$2,250,000
Total Employment	20
Avg. hourly Wage	\$24.62
Fringe benefits Percentage	35%
Total Payroll	\$1,382,500
Facility Footprint sq. ft.	3,500
Employee Occupancy/sf	180
Floor-Area-Ratio	0.33
Facility Construction Cost/sq. ft.	\$119

⁷ Department of Energy – Office Space Standard, 2016; chrome-extension://efaidnbmnnnibpcajpcglclefindmkaj/https://fims.doe.gov/fimsinfo/Documents/DOE/2016_Office_Space_Standard.pdf

Facility Construction Cost	\$418,000
Estimated Equipment Cost	\$110,000
Site Acreage	0.2
Land Cost	\$71,000
Total Investment	\$599,000

Employment distribution among the relevant major occupational groups for the industry are shown as follows:

Vocational Rehabilitation Services Agency – Employee Census			
Occupation	# of Jobs	Florida Avg. Hrly Wage	Cape Coral Avg. Hrly Wage
Rehabilitation Counselors	6	\$21.26	\$20.66
Social and Human Service Assistants	3	\$19.18	\$18.51
Educational, Guidance, and Career Counselors and Advisors	3	\$26.10	\$29.08
Social and Community Service Managers	2	\$35.70	\$37.19
General and Operations Managers	1	\$54.50	\$51.54
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	2	\$19.32	\$18.53
Office Clerks, General	1	\$19.35	\$19.43
Community and Social Service Specialists, All Other	1	\$27.33	\$21.85
Total	20		
Average Hourly Wage		\$24.82	\$24.62

Base financial information is as follows:

Vocational Rehabilitation Services Agency – Competitive Evaluation – Base Financial Data							
Market	Cost/Acre	Land Cost	Facility Cost/SF	Facility Cost	Total Investment	Financing	Debt Service
Cape Coral	\$295,000	\$71,000	\$119	\$528,000	\$599,000	\$479,200	\$37,700
Fort Lauderdale	\$1,437,000	\$347,000	\$125	\$547,000	\$894,000	\$715,200	\$56,200
Orlando	\$201,000	\$48,000	\$123	\$540,000	\$588,000	\$470,400	\$37,000
Palm Bay	\$494,000	\$119,000	\$130	\$565,000	\$684,000	\$547,200	\$43,000
Pompano Beach	\$2,057,000	\$496,000	\$125	\$547,000	\$1,043,000	\$834,400	\$65,600
Port St. Lucie	\$146,000	\$35,000	\$121	\$535,000	\$570,000	\$456,000	\$35,800
West Palm Beach	\$975,000	\$235,000	\$125	\$547,000	\$782,000	\$625,600	\$49,200

Net Operating Surplus (or Shortfall) for a Vocational Rehabilitation Services Agency in Cape Coral is **3.9%**, leading other competition except for Port St. Lucie.

Vocational Rehabilitation Services Agency – Annual Operating Ratios							
Market	Cape Coral	Fort Lauderdale	Orlando	Palm Bay	Pompano Beach	Port St. Lucie	West Palm Beach
Operating Budget	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Payroll	61.4%	66.7%	61.2%	60.4%	66.7%	58.9%	66.7%
Utilities & Fuels	8.0%	10.0%	8.7%	10.0%	10.1%	10.0%	10.0%
Debt Service	1.7%	2.5%	1.6%	1.9%	2.9%	1.6%	2.2%
Cost of revenue	71.1%	79.3%	71.5%	72.4%	79.8%	70.5%	78.9%
Annual Gross Surplus	28.9%	20.7%	28.5%	27.6%	20.2%	29.5%	21.1%
Materials	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%
General & Administrative Overhead	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%
Net Operating expenses	25.0%	25.0%	25.0%	25.0%	25.0%	25.0%	25.0%
Annual Net Surplus (or Shortfall)	3.9%	-4.3%	3.5%	2.6%	-4.8%	4.5%	-3.9%

*Note: Sales expense has been removed from the analysis

Labor Capability

To verify if labor capability exists in the Cape Coral area to support a large-scale Vocational Rehabilitation Services Agency, a review of the work force of the Cape Coral-Fort Myers MSA is required, as new applicants could commute from locations in the MSA. With the target of **879** new jobs, the Employee Census table from above is revisited with the new job requirements shown:

Vocational Rehabilitation Services Agency – Occupations Needed		
Occ. Code	Occupation	# of new jobs
21-1015	Rehabilitation Counselors	264
21-1093	Social and Human Service Assistants	132
21-1012	Educational, Guidance, and Career Counselors and Advisors	132
11-9151	Social and Community Service Managers	88
11-1021	General and Operations Managers	44
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	88

43-9061	Office Clerks, General	44
21-1099	Community and Social Service Specialists, All Other	44
43-3031	Bookkeeping, Accounting, and Auditing Clerks	44
	Total Occupations Required	879

In the following, the nine categories of staffing for a Vocational Rehabilitation Services Agency are evaluated for direct hiring capabilities:

21-1015 - Rehabilitation Counselors

In the Cape Coral-Fort Myers MSA, there are currently **50** persons employed in this position. Using the U6 factor of 5.9%, it is estimated that there are approximately **3** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Problematic** for this position, requiring some external recruitment of applicants or retraining of others in the market area.

21-1093 - Social and Human Service Assistants

In the MSA, there are currently **490** persons employed in this position. It is estimated that there are approximately **29** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Problematic** for this position, requiring some external recruitment of applicants or retraining of others in the market area.

21-1012 - Educational, Guidance, and Career Counselors and Advisors

In the MSA, there are currently **430** persons employed in this position. It is estimated that there are approximately **26** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Problematic** for this position, requiring some external recruitment of applicants or retraining of others in the market area.

11-9151 - Social and Community Service Managers

In the MSA, there are currently **220** persons employed in this position. It is estimated that there are approximately **13** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Problematic** for this position, requiring some external recruitment of applicants or retraining of others in the market area.

11-1021 - General and Operations Managers

In the MSA, there are currently **5,270** persons employed in this position. It is estimated that there are approximately **313** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

43-6014 - Secretaries and Administrative Assistants, Except Legal, Medical, and Executive

In the MSA, there are currently **2,990** persons employed in this position. It is estimated that there are approximately **177** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

43-9061 - Office Clerks, General

In the MSA, there are currently **6,330** persons employed in this position. It is estimated that there are approximately **374** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

21-1099 - Community and Social Service Specialists, All Other

In the MSA, there are currently **180** persons employed in this position. It is estimated that there are approximately **11** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Problematic** for this position, requiring some external recruitment of applicants or retraining of others in the market area.

43-3031 - Bookkeeping, Accounting, and Auditing Clerks

In the MSA, there are currently **3,510** persons employed in this position. It is estimated that there are approximately **208** applicants that are likely to be available to support this industry in Cape Coral. Direct hiring outcome is **Positive** for this position.

Conclusion

In summary, the positions that exhibit shortfall for a large Vocational Rehabilitation Services Agency are:

- Rehabilitation Counselors
- Social and Human Service Assistants
- Educational, Guidance, and Career Counselors and Advisors

- Social and Community Service Managers
- Community and Social Service Specialists, All Other

A smaller operation is a workable solution, but there may need to be some training and educational strategies needed to address these specialized jobs for a larger operation. We will delve deeper into public sector workforce requirements in the Task 10 – Workforce Analysis/Developments section.

Retail Review

To gauge the retail industry's performance, the generation of a Gap/Leakage Analysis has been the traditional course of action. The surge of online shopping use, however, has made this methodology somewhat obsolete as internet retail has changed the marketplace. Alternatively, we will use **43** retail spending items derived from ESRI's Retail Outlook⁸ distributed in the **8** groups as follows:

- Apparel & Services
- Computers
- Entertainment & Recreation
- Food
- Health
- Household Furnishings & Equipment
- Household Operations
- Travel

The initial use of this analysis was conducted in the Econographics Market Profiles developed in Task 2. Here, we will reexamine the retail spending patterns of Cape Coral as compared to the State of Florida, again using the Location Quotient (LQ) methodology. Key sectors are above the median for each category and also above 1.0 parity level.

Apparel & Services

	Cape Coral 2023 Spending	Cape Coral Spending Share	Florida Spending Share	Cape Coral LQ	Key Sectors
Men's Apparel	\$29,245,285	19.0%	50.5%	0.377	
Women's Apparel	\$52,937,106	34.5%	9.6%	3.580	■

⁸ ESRI Retail Demand Outlook; Business Analyst; Florida and Cape Coral, 2023

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Children's Apparel	\$23,467,135	15.3%	17.3%	0.882	
Footwear	\$34,002,380	22.1%	7.6%	2.927	■
Watches & Jewelry	\$10,941,714	7.1%	11.3%	0.629	
Apparel Products and Services	\$3,054,429	2.0%	3.7%	0.543	
Apparel and Services	\$153,648,049	100.0%	100.0%	0.755	median

Computers

	Cape Coral 2023 Spending	Cape Coral Spending Share	Florida Spending Share	Cape Coral LQ	Key Sectors
Computers and Hardware for Home Use	\$18,126,753	85.1%	85.2%	0.999	
Portable Memory	\$336,520	1.6%	1.5%	1.047	■
Computer Software	\$998,774	4.7%	4.8%	0.981	
Computer Accessories	\$1,833,697	8.6%	8.5%	1.017	■
Computer	\$21,295,744	100.0%	100.0%	1.008	median

Entertainment & Recreation

	Cape Coral 2023 Spending	Cape Coral Spending Share	Florida Spending Share	Cape Coral LQ	Key Sectors
Fees and Admissions	\$51,101,608	18.4%	18.4%	1.003	■
TV/Video/Audio	\$99,508,627	35.9%	36.6%	0.979	
Pets	\$67,945,182	24.5%	24.1%	1.015	■
Toys/Games/Crafts/Hobbies	\$11,675,835	4.2%	4.2%	0.999	
Recreational Vehicles and Fees	\$11,091,934	4.0%	3.7%	1.070	■
Sports/Recreation/Exercise Equipment	\$21,618,979	7.8%	7.6%	1.027	■
Photo Equipment and Supplies	\$3,347,965	1.2%	1.2%	0.995	
Reading	\$9,190,597	3.3%	3.4%	0.978	
Catered Affairs	\$2,024,547	0.7%	0.8%	0.964	
Entertainment & Recreation	\$277,505,274	100.0%	100.0%	0.999	median

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Food

	Cape Coral 2023 Spending	Cape Coral Spending Share	Florida Spending Share	Cape Coral LQ	Key Sectors
Food at Home	\$487,590,680	60.8%	60.8%	1.000	■
Food Away from Home	\$266,554,750	33.2%	33.2%	1.000	■
Alcoholic Beverages	\$47,890,025	6.0%	5.9%	1.004	■
Food	\$802,035,455	100.0%	100.0%	1.000	median

Health

	Cape Coral 2023 Spending	Cape Coral Spending Share	Florida Spending Share	Cape Coral LQ	Key Sectors
Nonprescription Drugs	\$13,067,386	26.5%	26.5%	0.999	
Prescription Drugs	\$28,174,829	57.1%	57.1%	1.000	■
Eyeglasses and Contact	\$8,096,316	16.4%	16.4%	1.001	■
Health	\$49,338,531	100.0%	100.0%	1.000	median

Household Furnishings and Equipment

	Cape Coral 2023 Spending	Cape Coral Spending Share	Florida Spending Share	Cape Coral LQ	Key Sectors
Household Textiles	\$8,771,030	6.5%	6.7%	0.976	
Furniture	\$60,544,956	45.1%	45.4%	0.992	
Rugs	\$2,959,638	2.2%	2.2%	1.000	■
Major Appliances	\$40,464,887	30.1%	29.1%	1.033	■
Housewares	\$7,920,010	5.9%	5.9%	0.995	
Small Appliances	\$5,176,570	3.9%	4.0%	0.967	
Luggage	\$1,034,187	0.8%	0.8%	0.977	
Telephones and Accessories	\$7,521,109	5.6%	5.8%	0.958	
Household Furnishings and Equipment	\$134,392,387	100.0%	100.0%	0.984	median

Household Operations

	Cape Coral 2023 Spending	Cape Coral Spending Share	Florida Spending Share	Cape Coral LQ	Key Sectors
Lawn and Garden	\$50,851,590	25.5%	24.2%	1.051	■

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Housekeeping Supplies	\$68,759,882	34.5%	34.5%	0.998
Personal Care Products	\$39,586,452	19.8%	20.2%	0.981
School Books and Supplies	\$9,707,134	4.9%	4.9%	0.990
Smoking Products	\$30,672,004	15.4%	16.1%	0.953
Household Operations	\$199,577,062	100.0%	100.0%	0.990 median

Travel

	Cape Coral 2023 Spending	Cape Coral Spending Share	Florida Spending Share	Cape Coral LQ	Key Sectors
Gasoline and Motor Oil	\$186,699,088	58.5%	58.9%	0.994	
Airline Fares	\$33,596,097	10.5%	10.5%	1.002	
Lodging on Trips	\$52,515,078	16.4%	16.2%	1.016	■
Auto/Truck Rental on Trips	\$5,784,219	1.8%	1.8%	1.005	■
Food and Drink on Trips	\$40,661,189	12.7%	12.6%	1.007	■
Travel	\$319,255,671	100.0%	100.0%	1.005 median	

Conclusion

For Cape Coral's **\$1.957** billion total spending on retail in the 43 categories, the following **19** groups represent the key retail sectors where consumer spending is the highest (ranked by retail spending). Together they total **\$1.272** billion or **65%** of the Cape Coral consumer spending pattern:

Retail category	Retail spending	LQ
Food at Home	\$487,590,680	1.000
Food Away from Home	\$266,554,750	1.000
Pets	\$67,945,182	1.015
Women's Apparel	\$52,937,106	3.580
Lodging on Trips	\$52,515,078	1.016
Fees and Admissions	\$51,101,608	1.003
Lawn and Garden	\$50,851,590	1.051
Alcoholic Beverages	\$47,890,025	1.004
Food and Drink on Trips	\$40,661,189	1.007
Major Appliances	\$40,464,887	1.033
Footwear	\$34,002,380	2.927
Prescription Drugs	\$28,174,829	1.000

Sports/Recreation/Exercise Equipment	\$21,618,979	1.027
Recreational Vehicles and Fees	\$11,091,934	1.070
Eyeglasses and Contact	\$8,096,316	1.001
Auto/Truck Rental on Trips	\$5,784,219	1.005
Rugs	\$2,959,638	1.000
Computer Accessories	\$1,833,697	1.017
Portable Memory	\$336,520	1.047
Total	\$1,272,410,607	
Percent of Total Consumers Spending		65%

From the above list, it is apparent that Women's Apparel (LQ=3.580) and Footwear (LQ=2.927) are dominant categories by virtue of their high LQ scores. Cross-marching these two segments against the Consumer Products & Services cluster reinforces the role of NAICS 4581 - Clothing and clothing accessories retailers and 4582 - Shoe retailers in the cluster assignment.

Please note that **6** other categories exhibited above median performance but were still below the 1.0 parity level for the State of Florida in the LQ methodology. These are areas of minor concern for Cape Coral but should be addressed:

- Housekeeping Supplies
- Furniture
- Children's Apparel
- Toys/Games/Crafts/Hobbies
- School Books and Supplies
- Housewares

In total for Cape Coral, **20** of the 43 retail sectors had LQ's above the 1.0 parity LQ levels. This indicates that consumers have active demand for retail products and services. Most industries were at about a level of 0.9 LQ or higher, with the notable exceptions of the following weaknesses:

- Watches & Jewelry
- Apparel Products and Services
- Men's Apparel

Assistance Programs Review

In this section, we will introduce state and local assistance programs that may have a bearing on

cluster development and prioritization. A more detailed review will occur in Task 5 – Incentives. To reiterate, the clusters developed in this report are:

- BUSINESS & FINANCIAL SERVICES
- COMMUNITY SERVICES
- CONSUMER PRODUCTS & SERVICES
- CULINARY TOURISM
- HEALTHCARE & LIFE SCIENCES
- INDUSTRIAL SERVICES
- IT & MEDIA
- SUSTAINABLE REAL ESTATE

State of Florida

The state of Florida offers a number of assistance incentives for business. These include:

- Capital Investment Tax Credit (CITC)
- Research and Development Tax Credit
- Quick Response Training (QRT)
- Incumbent Worker Training (IWT)
- Brownfield Redevelopment Bonus
- High Impact Performance Incentive Grant (HIPI)
- Community Contribution Tax Credit Program (CCTCP)
- Research and Development Tax Credit Program
- Rural and Urban Job Tax Credit Programs

Sales tax exemptions cover:

- R&D Equipment (Predominant Use)
- Semiconductor, Defense, and Space Technology Production Equipment
- Manufacturing Machinery and Equipment and Subsequent Labor, Parts, and Materials Used to Repair Equipment
- Electricity Used in the Manufacturing Process
- Clean Energy
- Aircraft Expenditures
- Spacecraft Expenditures

Directly sourced from the FloridaCommerce⁹ website:

“Florida industry specific resources are available for film, sports, logistics and tourism and for Florida's leading industry clusters. The leading industry clusters include clean technology, life sciences, information technology, aviation and aerospace, logistics and distribution, homeland security and defense, and financial and professional services. The state is also focusing economic development efforts with the strategic areas of emphasis being manufacturing, locating corporate headquarters and emerging technologies.”

Florida Recent Actions

It should be noted that the State of Florida has taken recent action to repeal several tax credit programs, some of which could have been directly applicable to Cape Coral's target industries. As of May 2023, the following have been terminated or no longer funded:

- Qualified target industry (QTI) tax refund program
- Quick action closing fund program
- New markets tax credit program
- Entertainment industry tax credit program
- Qualified defense contractor and space flight tax refund
- Corporate income tax credit for spaceflight projects program
- Innovation Incentive Program

Enterprise Florida Contact

Two telephone conversations were held with representatives of Enterprise Florida, the state's economic development agency. We contacted the Business Development office in Orlando and the Trade office in Miami (Coral Gables). As to the question asked if there were any new incentive programs being considered, we were advised that there were no new programs under development at the present time. No information was obtained as to whether the QTI would be reinstated.

⁹ FloridaCommerce; Business Resources – Industry Specific Resources; <https://floridajobs.org/business-growth-and-partnerships/for-businesses-and-entrepreneurs/business-resource>

Southwest Florida Planning Council (SWFPC)

The SWFPC is helpful in promoting the region through projects it initiates on key subjects. Among these are:

- Resiliency & Climate Change Projects
- Ecosystem Services Projects
- Sustainable and Equitable Agricultural Projects
- Covid Recovery & Resiliency

The Council does not provide direct financial assistance, but important studies such as the Cape Coral Climate Change or the Evacuation Study can have direct impacts on targeted industry clusters sustainability.

Lee County

- Industrial Development Revenue Bonds (IDRBs): long-term, tax-exempt, low-rate financing of capital requirements for new and expanding manufacturing facilities in Lee County.
- Gold Key Grant Program: financial assistance to small businesses leveraging in the US Commercial Services Gold Key Matching service.
- Opportunity Zones: temporary, step-up, or permanent deferral of inclusion in taxable income for capital gains reinvested into an Opportunity Fund.

City of Cape Coral

The City of Cape Coral has some interesting programs that we will explore in greater detail in Task 5. Recommendations to modify these to better address the target industry clusters will be made:

- Breaking Barriers to Business (B2B) Program
- Ad Valorem Tax Incentive Program
- Business Infrastructure Grant
- Cape Collaborates - Small Business Partner Program
- Enhanced Property Value Recapture Grant

Incubators & Accelerators

The development of business incubators nationwide has proven to be benefit to startup companies, with about 87% survivability after five years as compared to 44% without such

assistance¹⁰. Typically, a business incubator helps to develop and refine high-potential startup ideas. Incubators often operate locally and provide a host of resources—such as physical space to access as needed—over a span of one to five years.

A recent addition to incubators are Accelerators -- short, intensive programs that provide education, resources, and mentorship for early- or mid-stage companies. Accelerators are normally more structured and feature specific tracks to turn startup into a scalable business. Some offer multiple programs targeted at different industries or venture stages.

Examples of successful Incubator and Accelerators in Florida include:

- Culinary Accelerator @ Immokalee¹¹ -- members may select from a range of customized hours and plans to prepare, cook and package their culinary creations for distribution.
- TEC Garage (Tampa Bay Innovation Center)¹² -- home to independent workers including solo entrepreneurs, lawyers, investors, accountants, graphic designers, engineers, and other related occupations geared towards tech startups. The space is great for small companies, remote workers, startups and anyone who wants to share ideas, knowledge, space and equipment.
- Goldstein Business Accelerator¹³ (Orlando) -- provides access to \$100,000 in seed funding, mentorship from a seasoned pool of knowledgeable experts and introductions to angel investors and venture capitalist firms.
- Miami Lab Ventures: a Venture-capital fund and startup studio dedicated to accelerating real estate and construction technology industries.

Conclusions

It is possible that companies in the targeted industry clusters may need some degree of financial incentives to consider a Cape Coral location. These could be across industry programs or more tailored to individual companies. We examine the role of incentives more thoroughly in Task 5. Clearly, the development of incubators and accelerators will have a key role in successful cluster

¹⁰ "Incubators Heat Up Chances of Small Business Survival", Business New Daily; October 23., 2023; <https://www.businessnewsdaily.com/272-incubators-increase-small-business-success.html>

¹¹ <https://www.collieredo.org/culinary-accelerator>

¹² TEC Garage ; <https://tbinnovates.com/>

¹³ Goldstein Business Accelerator; <https://goldsteinaccelerator.com/>

promotion. In the meantime, we are excited by the advantages that Florida offers to prospective employers. As displayed on multiple economic development websites, these advantages reinforce the following:

- No Corporate Income Tax on limited partnerships
- No State Personal Income Tax
- No Corporate Franchise tax on Capital Stock
- No State-Level Property Tax assessed
- No Property Tax on Business Inventories
- No Sales Tax on Manufacturing Machinery & Equipment
- No Property Tax on Goods-in-Transit for up to 180 days
- No Sales Tax on Purchases of Raw Materials Incorporated in a Final Product for Resale, including Non-Reusable Containers or Packaging
- No Sales/Use Tax on Co-Generation of Electricity
- No Sales and Use Tax on Goods Manufactured or Produced in Florida for Export Outside the State

The target industry clusters presented will next be evaluated for economic development administration, incentives, real estate and infrastructure requirements, and workforce education. To recap, the new Cape Coral target industries are:

- BUSINESS & FINANCIAL SERVICES
- COMMUNITY SERVICES
- CONSUMER PRODUCTS & SERVICES
- CULINARY TOURISM
- HEALTHCARE & LIFE SCIENCES
- INDUSTRIAL SERVICES
- IT & MEDIA
- SUSTAINABLE REAL ESTATE

The 13,640 forecasted total employment for the 8 targeted industry clusters will produce a total of 15,162 new jobs (direct, indirect, and induced) and an annual total economic impact of \$3.358 billion, as shown in the table below:

Task 3 Report

Cluster	Direct Empl.	Indirect Empl.	Induced Empl.	Total Empl.	Labor Income	GDP Value Added	Total output
Business & Financial Services	3,675	253	50	3,978	\$ 254,634,582	\$ 298,732,626	\$ 614,095,719
Community Services	3,927	446	59	4,431	\$ 443,126,637	\$ 757,735,450	\$ 1,344,640,009
Consumer Products & Services	1,430	131	24	1,585	\$ 130,667,818	\$ 225,113,563	\$ 379,315,014
Culinary Tourism	123	2	1	126	\$ 4,257,599	\$ 7,040,277	\$ 11,070,960
Healthcare & Life Sciences	3,087	264	96	3,448	\$ 281,772,074	\$ 328,634,799	\$ 568,359,440
Industrial Services	256	36	14	306	\$ 31,137,817	\$ 50,646,917	\$ 92,081,287
IT & Media	770	93	10	874	\$ 56,682,708	\$ 87,414,340	\$ 255,354,976
Sustainable Real Estate	372	36		414	\$ 28,321,677	\$ 51,842,661	\$ 92,640,448
Total	13,640	1,262	254	15,162	\$ 1,230,600,911	\$ 1,807,160,634	\$ 3,357,557,854

3.e – Task 3 Progress Report/video conference

We conducted a video conference with the Project Review Committee on January 24, 2024. Work product to date was discussed and the materials covered were previously uploaded to the website.