



APPLIEDMARKETING

identifying and creating opportunities



# Ocala/Marion County Economic Development Corporation

## Economic Base Analysis

*Presented to:*

Pete Tesch

Ocala/Marion County Economic Development Corporation

*Developed by:*

Jeff Vedders, Associate

Leigh Howe, Partner

Applied Marketing

## Economic Base Analysis

### INTRODUCTION AND METHODOLOGY

The purpose of the Economic Base Analysis is to better understand the local Ocala and Marion County economy in order to provide direction for targeting industry sectors for the region. This analysis will 1) aid in the identification of additional industry sectors that are not being currently targeted and 2) strengthen the argument for continued targeting of previously identified industry sectors.

The Economic Base Analysis includes a detailed look at employment and business trends within Marion County. By NAICS Super Sector and by select sub sectors, this analysis includes a five year trend of business and employment changes within the County. We've also compared and contrasted Marion County with Florida, the U.S. and several peer counties. To get a better understanding of each county's economy, we've included a location quotient analysis. A location quotient is a ratio between the employment of a local economy with the U.S. average. A location quotient with a result less than one means that a community may not be getting its share of activity. Thus, it may be importing products and services to meet demand. A location quotient with a result greater than one indicates that a community has a greater share of activity. As current demand is met, the community is likely exporting products and services.

The analysis includes the following main sections in the Appendix:

- ⦿ Marion County Analysis – a look at Marion County employments with comparison to Florida and the U.S. This section also includes a five year trend of businesses and employment within the County.
- ⦿ In-Depth Look at Select NAICS Sectors for Marion County – for select NAICS sectors, a detailed analysis of employment and business trends by 3-digit and 4-digit NAICS codes
- ⦿ Marion County Peer Comparison – a comparison of Marion County employment by NAICS Super Sector with peer counties in Florida, Georgia and Indiana. Specific counties include:
  - Alachua County, FL
  - Pasco County, FL
  - Polk County, FL
  - Dougherty County, GA
  - Lowndes County, GA
  - Elkhart County, IN
  - Kosciusko County, IN

All data used is from the U.S. Bureau of Labor Statistics Quarter Census of Employment Wages. The employment and businesses analyzed are private establishments. The most recent data available is from 2007.

## FINDINGS AND RECOMMENATIONS

### **Overall Trends**

Comparing 2007 to the base line of 2003, Marion County experienced healthy increases both in the number of business and employees across all sectors. However, after a period of growth from 2003 to 2006, between 2006 and 2007, there were employment declines in several sectors including:

- ⊙ Construction
- ⊙ Manufacturing
- ⊙ Trade, Transportation, and Utilities
- ⊙ Information
- ⊙ Professional & Business Services
- ⊙ Unclassified

Industry sub sectors hardest hit during this time period include:

- ⊙ Wood Product Mfg.
- ⊙ Furniture & Related Mfg.
- ⊙ Chemical Mfg.
- ⊙ Transportation Equip. Mfg.
- ⊙ Misc. Mfg.
- ⊙ Insurance Carriers & Related
- ⊙ Telecommunications

Much of this decline can be attributed to problems within the housing market that were already present in Florida prior to the current recession. This would explain the decline in construction employment as well as the decline in wood products and furniture that were supporting the construction industry.

However, from 2006 to 2007 several industry sectors and sub sectors experienced employment growth. Sectors with recent employment growth include:

- ⊙ Natural Resources and Mining
- ⊙ Trade, Transportation, and Utilities
- ⊙ Financial Activities
- ⊙ Education and Health Services
- ⊙ Leisure and Hospitality
- ⊙ Other Services

Sub sectors with significant recent employment growth include:

- ⊙ Food Mfg.
- ⊙ Nonmetallic Mineral Prod. Mfg.
- ⊙ Machinery Mfg.
- ⊙ Truck Transportation
- ⊙ Transit & Ground Passenger Transp.
- ⊙ Credit Intermediation & Related



# APPLIED MARKETING

identifying and creating opportunities

- ⊙ Architectural & Engineering Services
- ⊙ Specialized Design Services
- ⊙ Computer Systems Design & Related
- ⊙ Other Profession & Technical Services
- ⊙ Investigation & Security Services
- ⊙ Services to Buildings & Dwellings
- ⊙ Remediation & Other Waste Services

The food industry is one that is largely recession resistant as even in a down economy, people still need to eat. The growth in the transportation industry is reflective of employment trends throughout the country.

## Peer Comparison

Compared with Florida and the U.S., Marion County has a much higher share of employment in Natural Resources and Mining, Construction, Manufacturing (although lower than the U.S.), and Trade, Transportation, and Utilities. Marion County has a much lower share of Professional and Business Services employment.

When comparing Marion County to other peer counties using a location quotient analysis, Marion County's economy is most similar to Polk County. Specific findings include:

- ⊙ Marion County has a much higher share of Natural Resources and Mining employment – although it's very similar to Polk County
- ⊙ Marion County and Florida counties in general have a much higher share of Construction employment
- ⊙ Although Marion County has the highest share of manufacturing employment compared to the Florida counties, it is lower than the U.S. average and much lower than Elkhart and Kosciusko Counties
- ⊙ Marion County's share of Professional and Business Services employment is the lowest amongst Florida counties

## Targeting Recommendations

Based on this analysis, we recommend that Marion County officials consider targeting the following industries:

- ⊙ Equine related – as seen by the larger share of employment in Natural Resources and Mining which includes horse farms, there continues to be a competitive advantage that Marion County has over other regions of the country with the possible exception of Polk County.
- ⊙ Warehousing and distribution – this is an industry that continues to grow throughout the U.S. and recent employment growth coupled with a high share of employment indicate that transportation companies are finding Ocala and Marion County to be a desirable location.
- ⊙ Food manufacturing – this industry has seen recent employment growth within the County. Also, it is an industry that tends to be more stable than others due to recent consumer trends and the fact that food production is not likely to be outsourced outside of the U.S.
- ⊙ Professional & Business Services – this industry is well represented throughout Florida; However, Marion County has a much lower share of employment. This indicates that there may be the potential to attract businesses within this sector. Based on employment trends



# APPLIEDMARKETING

identifying and creating opportunities

within the County, sub sectors that Marion County may wish to consider include:  
Architectural & Engineering Services; Computer Systems Design & Related; Management &  
Tech. Consulting Services.; and Other Prof. & Tech. Services

## APPENDIX



# APPLIEDMARKETING

identifying and creating opportunities

## MARION COUNTY ANALYSIS

### TOTAL EMPLOYMENT – U.S., FLORIDA, AND MARION COUNTY

The largest employment sectors for Marion County are Trade, Transportation, and Utilities; Education and Health Services; and Leisure and Hospitality respectively. By contrast, the largest employment sectors for Florida are Trade, Transportation, and Utilities; Professional and Business Services; and Education and Health Services. This is in line with the employment sectors at the national level.

INDUSTRY	U.S. TOTAL	FLORIDA STATEWIDE	MARION COUNTY, FLORIDA
Base Industry: Total, all industries	114,012,221	6,864,467	86,564
Natural Resources and Mining	1,826,609	96,217	2,819
Construction	7,562,732	593,198	10,226
Manufacturing	13,833,022	388,283	9,428
Trade, Transportation, and Utilities	26,338,207	1,605,899	23,105
Information	3,029,789	161,620	1,909
Financial Activities	8,145,981	538,575	5,695
Professional and Business Services	17,859,796	1,319,852	7,598
Education and Health Services	17,433,162	973,606	12,676
Leisure and Hospitality	13,327,559	929,216	10,314
Other Services	4,438,439	251,607	2,720
Unclassified	216,926	6,394	73

Source: BLS Quarterly Census of Employment and Wages



# APPLIEDMARKETING

identifying and creating opportunities

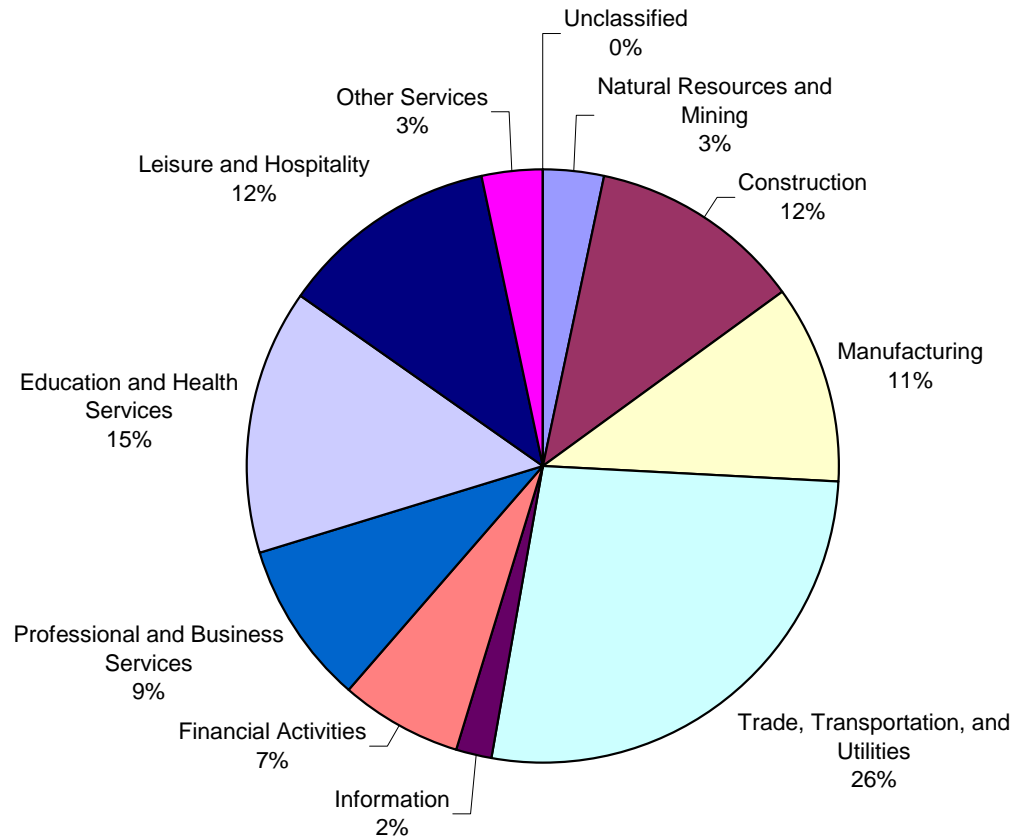
## PERCENTAGE OF EMPLOYMENT – U.S., FLORIDA, AND MARION COUNTY

Compared with Florida, Marion County has a much higher percentage of employment in Natural Resources and Mining; Construction, and Manufacturing. Marion County also has a much lower percentage of Professional and Business Services employment.

INDUSTRY	U.S.	FLORIDA STATEWIDE	MARION COUNTY, FLORIDA
Base Industry: Total, all industries	100.00%	100.00%	100.00%
Natural Resources and Mining	1.60%	1.40%	3.26%
Construction	6.63%	8.64%	11.81%
Manufacturing	12.13%	5.66%	10.89%
Trade, Transportation, and Utilities	23.10%	23.39%	26.69%
Information	2.66%	2.35%	2.21%
Financial Activities	7.14%	7.85%	6.58%
Professional and Business Services	15.66%	19.23%	8.78%
Education and Health Services	15.29%	14.18%	14.64%
Leisure and Hospitality	11.69%	13.54%	11.91%
Other Services	3.89%	3.67%	3.14%
Unclassified	0.19%	0.09%	0.08%

Source: BLS Quarterly Census of Employment and Wages

**Marion County Employment Breakdown by NAICS Super Sector**





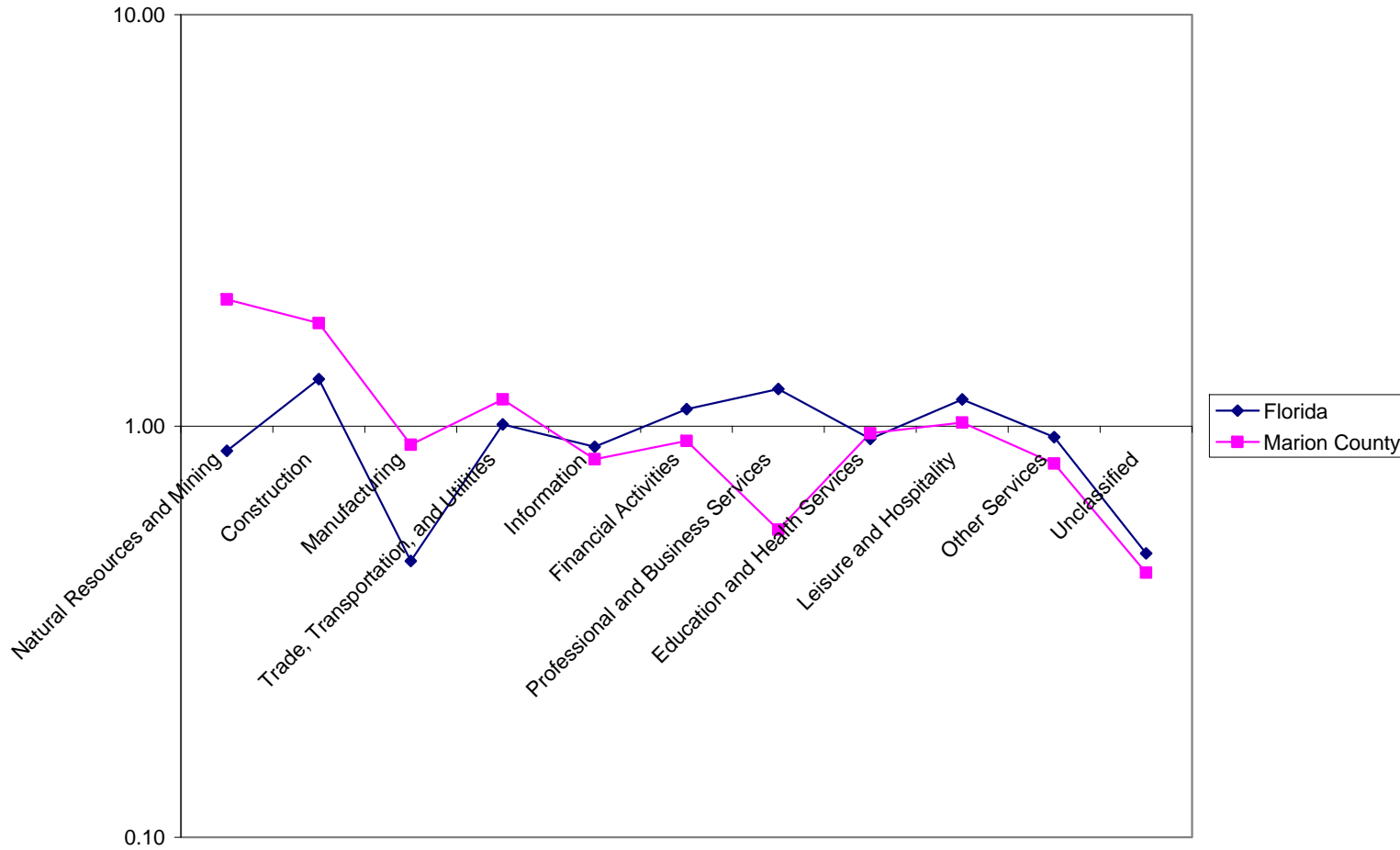
**LOCATION QUOTIENT – COMPARISON OF U.S., FLORIDA, AND MARION COUNTY (U.S. AS BASE)**

Compared with Florida and the U.S., Marion County has a much higher share of employment in Natural Resources and Mining; Construction; Manufacturing (although lower than the U.S.), and Trade, Transportation, and Utilities. By contrast, Marion County has a much lower share of Professional and Businesses Services employment. The chart on the following page further illustrates the comparison.

INDUSTRY	FLORIDA STATEWIDE	MARION COUNTY, FLORIDA
Base Industry: Total, all industries	1.00	1.00
Natural Resources and Mining	0.87	2.03
Construction	1.30	1.78
Manufacturing	0.47	0.90
Trade, Transportation, and Utilities	1.01	1.16
Information	0.89	0.83
Financial Activities	1.10	0.92
Professional and Business Services	1.23	0.56
Education and Health Services	0.93	0.96
Leisure and Hospitality	1.16	1.02
Other Services	0.94	0.81
Unclassified	0.49	0.44

Source: BLS Quarterly Census of Employment and Wages

**Location Quotient Comparison Marion County & Florida**





**APPLIED**MARKETING  
 identifying and creating opportunities

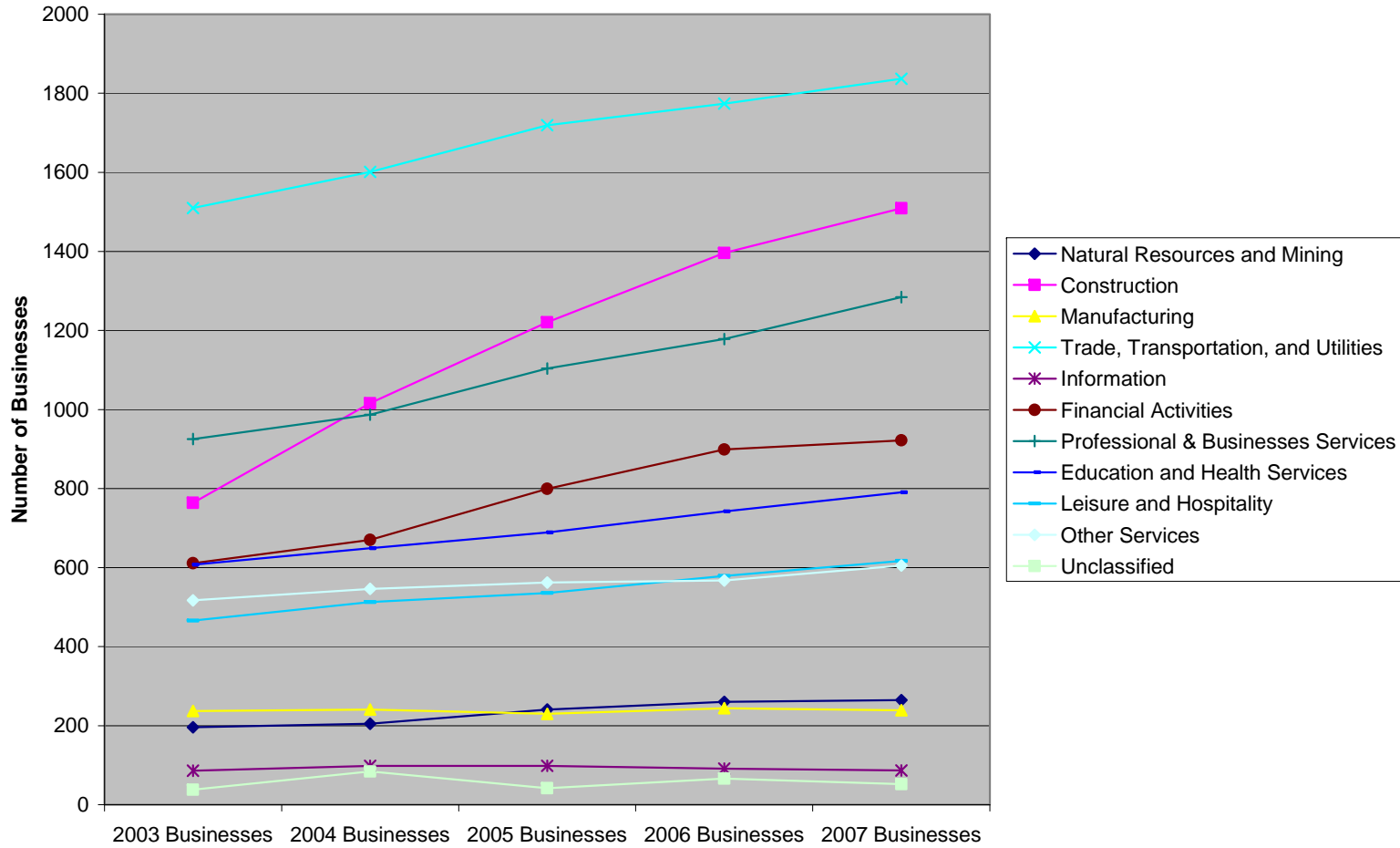
**MARION COUNTY BUSINESSES BY NAICS SUPER SECTOR  
 5 YEAR CHANGE 2003 TO 2007**

We analyzed the change in the number of businesses within Marion County over a five year period from 2003 through 2007. For the most part, the County has seen a steady increase in the number of businesses. However, Manufacturing and Information have both been relatively flat. In fact, there have been declines within these sectors from 2006 to 2007.

NAICS SECTOR	2003 BUSINESSES	2004 BUSINESSES	2005 BUSINESSES	2006 BUSINESSES	2007 BUSINESSES	5 YEAR CHANGE	5 YEAR % CHANGE
Natural Resources and Mining	196	205	241	260	265	69	35.20%
Construction	764	1,016	1,221	1,396	1,509	745	97.51%
Manufacturing	237	241	230	244	239	2	0.84%
Trade, Transportation, and Utilities	1,510	1,601	1,719	1,774	1,837	327	21.66%
Information	86	98	98	91	87	1	1.16%
Financial Activities	611	670	799	899	922	311	50.90%
Professional & Businesses Services	925	987	1,104	1,178	1,284	359	38.81%
Education and Health Services	607	649	689	742	790	183	30.15%
Leisure and Hospitality	466	513	536	579	617	151	32.40%
Other Services	517	546	562	567	605	88	17.02%
Unclassified	38	84	42	66	52	14	36.84%

Source: BLS Quarterly Census of Employment and Wages

### 5 Year Marion County Business Change





**APPLIED**MARKETING  
identifying and creating opportunities

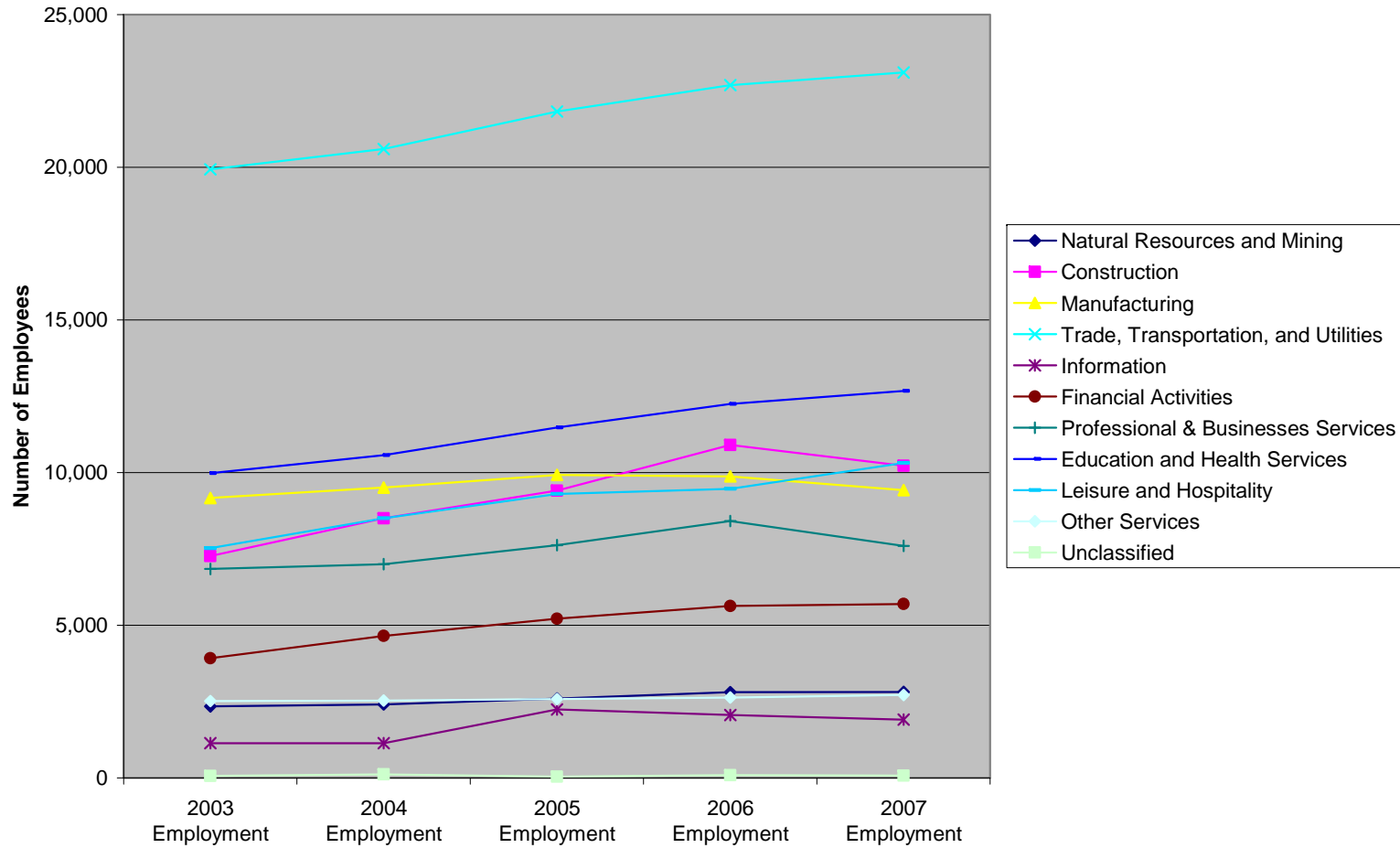
**MARION COUNTY EMPLOYMENT BY NAICS SUPER SECTOR  
5 YEAR CHANGE 2003 TO 2007**

As with the change in businesses over a five year period, employment in Marion County has been slowly increasing. However, there have been some recent declines. Construction, Manufacturing, Trade, Transportation, and Utilities, Information, Professional & Business Services, and Unclassified employment have declined between 2006 and 2007. This decline can be better seen on the chart below.

NAICS SECTOR	2003 EMP	2004 EMP	2005 EMP	2006 EMP	2007 EMP	5 YEAR CHANGE	5 YEAR % CHANGE
Natural Resources and Mining	2,344	2,411	2,600	2,809	2,819	475	20.26%
Construction	7,266	8,502	9,410	10,908	10,226	2,960	40.74%
Manufacturing	9,173	9,511	9,922	9,872	9,428	255	2.78%
Trade, Transportation, and Utilities	19,936	20,600	21,826	22,690	23,105	3,169	15.90%
Information	1,136	1,142	2,239	2,061	1,909	773	68.05%
Financial Activities	3,917	4,654	5,220	5,629	5,695	1,778	45.39%
Professional & Businesses Services	6,843	7,002	7,625	8,410	7,598	755	11.03%
Education and Health Services	9,986	10,572	11,480	12,247	12,676	2,690	26.94%
Leisure and Hospitality	7,527	8,509	9,305	9,465	10,314	2,787	37.03%
Other Services	2,514	2,532	2,584	2,634	2,720	206	8.19%
Unclassified	65	114	43	91	73	8	12.31%

Source: BLS Quarterly Census of Employment and Wages

### 5 Year Marion County Employment Change





# APPLIEDMARKETING

identifying and creating opportunities

## IN-DEPTH LOOK AT SELECT NAICS SECTORS FOR MARION COUNTY

### MARION COUNTY MANUFACTURING BUSINESSES 5 YEAR CHANGE 2003 TO 2007

The analysis below breaks out the change in manufacturing businesses by 3-digit NAICS Code. The manufacturing sub sectors that have seen the most growth over the five year period are Plastics & Rubber Mfg. and Nonmetallic Mineral Product Mfg. The sub sectors with the biggest declines are Furniture & Related Mfg; Paper Mfg. and Printing & Related; Chemical Mfg.; and Fabricated Metal Product Mfg. In fact, Chemical Mfg. and Furniture & Related Mfg. declined by 3 businesses between 2006 and 2007.

3-DIGIT NAICS	DESCRIPTION	2003 BUS	2004 BUS	2005 BUS	2006 BUS	2007 BUS	5 YEAR CHANGE	5 YEAR % CHANGE
311	Food Mfg.	9	9	9	12	11	2	22.22%
312	Beverage & Tobacco Prod. Mfg.	ND	2	2	3	3	NA	NA
313	Textile Mills	NA	1	2	2	3	NA	NA
314	Textile Product Mfg.	7	7	7	7	8	1	14.29%
315	Apparel Mfg.	NA	0	2	2	2	NA	NA
316	Leather & Allied Prod. Mfg.	ND	2	2	2	1	NA	NA
321	Wood Product Mfg.	21	24	25	25	25	4	19.05%
322	Paper Mfg.	7	6	5	4	3	-4	-57.14%
323	Printing & Related	21	19	18	18	18	-3	-14.29%
324	Petroleum & Coal Prod. Mfg.	ND	2	2	2	1	NA	NA
325	Chemical Mfg.	8	9	8	9	6	-2	-25.00%
326	Plastics & Rubber Mfg.	14	15	16	16	18	4	28.57%
327	Nonmetallic Mineral Prod. Mfg.	14	13	13	17	18	4	28.57%
331	Primary Metal Mfg.	ND	3	3	3	3	NA	NA
332	Fabricated Metal Prod. Mfg.	32	35	32	32	30	-2	-6.25%
333	Machinery Mfg.	17	16	15	18	18	1	5.88%
334	Computer & Electronic Prod. Mfg.	8	10	11	11	10	2	25.00%
335	Electrical Equipment & App. Mfg.	ND	2	1	NA	NA	NA	NA



**APPLIEDMARKETING**  
identifying and creating opportunities

3-DIGIT NAICS	DESCRIPTION	2003 BUS	2004 BUS	2005 BUS	2006 BUS	2007 BUS	5 YEAR CHANGE	5 YEAR % CHANGE
336	Transportation Equip. Mfg.	18	16	18	17	20	2	11.11%
337	Furniture & Related Mfg.	28	27	25	22	19	-9	-32.14%
339	Misc. Mfg.	23	23	24	24	23	0	0.00%

ND: Not disclosable – data do not meet BLS or State agency disclosure standards

NA: Not available due to missing data

Source: BLS Quarterly Census of Employment and Wages

**MARION COUNTY MANUFACTURING EMPLOYMENT  
5 YEAR CHANGE 2003 TO 2007**

The manufacturing sub sectors with the greatest employment growth over the five year period include Nonmetallic Mineral Prod. Mfg; Food Mfg.; and Computer & Electronic Prod. Mfg. The Wood Product Mfg. sub sector was the most volatile over the five year period starting with 999 employees in 2003, peaking at 1,403 in 2005 and declining to 952 in 2007. From its peak in 2005 employment declined by 451. Other sectors with significant employment declines include Chemical Mfg.; Transportation Equip. Mfg.; and Misc. Mfg.

3-DIGIT NAICS	DESCRIPTION	2003 EMP	2004 EMP	2005 EMP	2006 EMP	2007 EMP	5 YEAR CHANGE	5 YEAR % CHANGE
311	Food Mfg.	354	345	352	397	475	121	34.18%
312	Beverage & Tobacco Prod. Mfg.	ND	ND	ND	ND	ND	NA	NA
313	Textile Mills	NA	ND	ND	ND	8	NA	NA
314	Textile Product Mfg.	82	117	104	78	86	4	4.88%
315	Apparel Mfg.	NA	ND	ND	ND	ND	NA	NA
316	Leather & Allied Prod. Mfg.	ND	ND	ND	ND	ND	NA	NA
321	Wood Product Mfg.	999	1,228	1,403	1,199	952	-47	-4.70%
322	Paper Mfg.	128	132	170	126	126	-2	-1.56%
323	Printing & Related	105	112	102	102	104	-1	-0.95%
324	Petroleum & Coal Prod. Mfg.	ND	ND	ND	ND	ND	NA	NA
325	Chemical Mfg.	224	201	194	149	139	-85	-37.95%
326	Plastics & Rubber Mfg.	801	810	819	810	821	20	2.50%



# APPLIEDMARKETING

identifying and creating opportunities

3-DIGIT NAICS	DESCRIPTION	2003 EMP	2004 EMP	2005 EMP	2006 EMP	2007 EMP	5 YEAR CHANGE	5 YEAR % CHANGE
327	Nonmetallic Mineral Prod. Mfg.	286	304	344	494	512	226	79.02%
331	Primary Metal Mfg.	ND	122	133	144	121	NA	NA
332	Fabricated Metal Prod. Mfg.	1,482	1,446	1,509	1,580	1,545	63	4.25%
333	Machinery Mfg.	544	589	585	603	625	81	14.89%
334	Computer & Electronic Prod. Mfg.	1,015	1,148	1,143	1,163	1,145	130	12.81%
335	Electrical Equipment & App. Mfg.	ND	ND	ND	NA	NA	NA	NA
336	Transportation Equip. Mfg.	1,674	1,482	1,453	1,491	1,508	-166	-9.92%
337	Furniture & Related Mfg.	878	942	1,042	1,010	915	37	4.21%
339	Misc. Mfg.	238	232	259	228	107	-131	-55.04%

ND: Not disclosable – data do not meet BLS or State agency disclosure standards

NA: Not available due to missing data

Source: BLS Quarterly Census of Employment and Wages



**APPLIEDMARKETING**  
 identifying and creating opportunities

**MARION COUNTY TRANSPORTATION BUSINESSES  
 5 YEAR CHANGE 2003 TO 2007**

Overall the transportation sector has seen healthy business growth from 2003 through 2007. Truck Transportation is the sub sector with the greatest increase.

3-DIGIT NAICS	DESCRIPTION	2003 BUS	2004 BUS	2005 BUS	2006 BUS	2007 BUS	5 YEAR CHANGE	5 YEAR % CHANGE
481	Air Transportation	ND	1	2	2	4	NA	NA
483	Water Transportation	ND	1	2	2	2	NA	NA
484	Truck Transportation	102	118	128	132	140	38	37.25%
485	Transit & Ground Passenger Transp.	8	9	11	10	11	3	37.50%
486	Pipeline Transportation	ND	2	1	1	1	NA	NA
487	Scenic & Sightseeing Transportation	NA	0	1	1	1	NA	NA
488	Support Activities for Transp.	20	24	21	22	26	6	30.00%
491	Postal Services	NA	NA	NA	1	1	NA	NA
492	Couriers & Messengers	9	14	14	14	12	3	33.33%
493	Warehousing & Storage	6	7	8	9	11	5	83.33%

ND: Not disclosable – data do not meet BLS or State agency disclosure standards

NA: Not available due to missing data

Source: BLS Quarterly Census of Employment and Wages



**MARION COUNTY TRANSPORTATION EMPLOYMENT  
5 YEAR CHANGE 2003 TO 2007**

The Transportation sector has seen healthy employment growth over the five year period. Truck Transportation and Warehousing & Storage in particular have added the most jobs.

3-DIGIT NAICS	DESCRIPTION	2003 EMP	2004 EMP	2005 EMP	2006 EMP	2007 EMP	5 YEAR CHANGE	5 YEAR % CHANGE
481	Air Transportation	ND	ND	ND	ND	ND	NA	NA
483	Water Transportation	ND	ND	ND	ND	ND	NA	NA
484	Truck Transportation	1,290	1,353	1,268	1,266	1,392	102	7.91%
485	Transit & Ground Passenger Transp.	41	51	52	49	77	36	87.80%
486	Pipeline Transportation	ND	ND	ND	ND	ND	NA	NA
487	Scenic & Sightseeing Transportation	NA	ND	ND	ND	ND	NA	NA
488	Support Activities for Transp.	63	74	67	122	100	37	58.73%
491	Postal Services	NA	NA	NA	ND	ND	NA	NA
492	Couriers & Messengers	268	278	305	306	303	35	13.06%
493	Warehousing & Storage	43	27	45	547	513	470	1,093.02%

ND: Not disclosable – data do not meet BLS or State agency disclosure standards

NA: Not available due to missing data

Source: BLS Quarterly Census of Employment and Wages



**APPLIEDMARKETING**  
*identifying and creating opportunities*

**MARION COUNTY FINANCE BUSINESSES  
 5 YEAR CHANGE 2003 TO 2007**

With the exception of Funds, Trusts, & Other, all sub sectors within the Financial Services, this sector have seen growth in the number of businesses over the five year period. However, there were some recent declines in the Insurance Carriers & Related and the Rental & Leasing Services sub sectors.

3-DIGIT NAICS	DESCRIPTION	2003 BUS	2004 BUS	2005 BUS	2006 BUS	2007 BUS	5 YEAR CHANGE	5 YEAR % CHANGE
522	Credit Intermediation & Related	129	141	148	156	173	44	34.11%
523	Securities, Commodity Contracts, Investments	45	53	64	78	86	41	91.11%
524	Insurance Carriers & Related	138	154	161	175	170	32	23.19%
525	Funds, Trusts, & Other	4	3	3	3	2	-2	-50.00%
531	Real Estate	232	256	354	417	423	191	82.33%
532	Rental & Leasing Services	ND	62	69	70	67	NA	NA
533	Lessors of Nonfinancial Intangible Assets	ND	1	1	1	1	NA	NA

ND: Not disclosable – data do not meet BLS or State agency disclosure standards

NA: Not available due to missing data

Source: BLS Quarterly Census of Employment and Wages



**APPLIEDMARKETING**  
*identifying and creating opportunities*

**MARION COUNTY FINANCE EMPLOYMENT  
 5 YEAR CHANGE 2003 TO 2007**

The Credit Intermediation & Related and Real Estate sub sectors experienced the greatest growth in the number of employees from 2003 through 2007. However, there was a decline in employment within the real estate sub sector between 2006 and 2007. Insurance Carriers & Related experienced an employment decline over the five year period.

3-DIGIT NAICS	DESCRIPTION	2003 EMP	2004 EMP	2005 EMP	2006 EMP	2007 EMP	5 YEAR CHANGE	5 YEAR % CHANGE
522	Credit Intermediation & Related	1,682	2,393	2,449	2,742	2,982	1,300	1
523	Securities, Commodity Contracts, Investments	206	211	260	292	ND	NA	NA
524	Insurance Carriers & Related	829	835	888	862	798	-31	0
525	Funds, Trusts, & Other	4	4	5	4	ND	NA	NA
531	Real Estate	790	771	1,082	1,167	1,116	326	0
532	Rental & Leasing Services	ND	ND	ND	ND	ND	NA	NA
533	Lessors of Nonfinancial Intangible Assets	ND	ND	ND	ND	ND	NA	NA

ND: Not disclosable – data do not meet BLS or State agency disclosure standards

NA: Not available due to missing data

Source: BLS Quarterly Census of Employment and Wages



**APPLIED**MARKETING  
identifying and creating opportunities

**MARION COUNTY INFORMATION BUSINESSES  
5 YEAR CHANGE 2003 TO 2007**

In general, Marion County has experienced a decline in the number of Information Businesses over the five year period. Broadcasting, Except Internet and Data Process & Related lost the most businesses. Telecommunications, although flat over the five year period, lost 8 businesses from its peak in 2005 to 2007.

3-Digit NAICS	Description	2003 BUS	2004 BUS	2005 BUS	2006 BUS	2007 BUS	5 Year Change	5 Year % Change
511	Publishing Industries, Except Internet	17	19	22	22	20	3	17.65%
512	Motion Picture & Sound Recording	11	13	11	11	10	-1	-9.09%
515	Broadcasting, Except Internet	7	6	4	4	3	-4	-57.14%
516	Internet Publishing & Broadcasting	ND	2	2	4	NA	NA	NA
517	Telecommunications	37	44	45	37	37	0	0.00%
518	Data Processing & Related	12	13	13	13	8	-4	-33.33%
519	Other Information Services	ND	1	NA	NA	9	NA	NA

ND: Not disclosable – data do not meet BLS or State agency disclosure standards

NA: Not available due to missing data

Source: BLS Quarterly Census of Employment and Wages



**APPLIED**MARKETING  
*identifying and creating opportunities*

**MARION COUNTY INFORMATION EMPLOYMENT  
 5 YEAR CHANGE 2003 TO 2007**

Employment within the Information sector has for the most part declined over the five year period with the exception of the Telecommunications sub sector. Recently, the Motion Picture & Sound Recording sub sector increased employment between 2006 and 2007. Although Data Processing & Related experienced growth over the five year period, it shed 29 employees between 2006 and 2007.

3-DIGIT NAICS	DESCRIPTION	2003 EMP	2004 EMP	2005 EMP	2006 EMP	2007 EMP	5 YEAR CHANGE	5 YEAR % CHANGE
511	Publishing Industries, Except Internet	489	453	589	475	461	-28	-5.73%
512	Motion Picture & Sound Recording	96	89	76	83	89	-7	-7.29%
515	Broadcasting, Except Internet	83	73	ND	69	68	-15	-18.07%
516	Internet Publishing & Broadcasting	ND	ND	ND	ND	4	NA	NA
517	Telecommunications	404	460	1,424	1,328	1,209	805	199.26%
518	Data Processing & Related	49	64	80	102	73	24	48.98%
519	Other Information Services	ND	ND	NA	NA	9	NA	NA

ND: Not disclosable – data do not meet BLS or State agency disclosure standards

NA: Not available due to missing data

Source: BLS Quarterly Census of Employment and Wages



**APPLIED**MARKETING  
identifying and creating opportunities

**MARION COUNTY PROFESSIONAL SERVICES BUSINESSES  
5 YEAR CHANGE 2003 TO 2007**

Several Professional Services sub sectors saw business growth over the five year period. These include Legal Services; Architectural & Engineering Services; Specialized Design Services; Computer Systems Design & Related; Management & Tech. Consulting Services; Other Prof. & Tech. Services; and Services to Buildings & Dwellings.

4-DIGIT NAICS	DESCRIPTION	2003 BUS	2004 BUS	2005 BUS	2006 BUS	2007 BUS	5 YEAR CHANGE	5 YEAR % CHANGE
5411	Legal Services	172	178	182	186	193	21	12.21%
5412	Accounting & Bookkeeping	104	92	95	98	101	-3	-2.88%
5413	Architectural & Engineering Services	71	74	91	98	110	39	54.93%
5414	Specialized Design Services	20	32	36	31	31	11	55.00%
5415	Computer Systems Design & Related	28	32	35	47	47	19	67.86%
5416	Management & Tech. Consulting Svcs.	67	80	102	122	127	60	89.55%
5417	Scientific Research & Dev. Services	8	9	11	12	13	5	62.50%
5419	Other Prof. & Tech. Services	67	72	85	94	101	34	50.75%
5511	Management of Companies	11	14	18	20	19	8	72.73%
5611	Office Administrative Services	ND	17	25	23	27	NA	NA
5612	Facilities Support Services	ND	2	2	2	1	NA	NA
5613	Employment Services	26	25	31	32	35	9	34.62%
5614	Business Support Services	34	31	33	32	41	7	20.59%
5615	Travel Arrangement & Reservation Svcs.	7	7	8	9	10	3	42.86%
5616	Investigation & Security Services	23	26	27	26	29	6	26.09%
5617	Services to Buildings & Dwellings	221	243	260	287	326	105	47.51%
5619	Other Support Services	13	12	17	15	17	4	30.77%
5621	Waste Collection	5	4	4	5	8	3	60.00%
5622	Waste Treatment and Disposal	ND	7	6	7	7	NA	NA
5629	Remediation & Other Waste Services	ND	4	5	4	9	NA	NA

ND: Not disclosable – data do not meet BLS or State agency disclosure standards, NA: Not available due to missing data  
Source: BLS Quarterly Census of Employment and Wages



**APPLIEDMARKETING**  
*identifying and creating opportunities*

**MARION COUNTY PROFESSIONAL SERVICES EMPLOYMENT  
 5 YEAR CHANGE 2003 TO 2007**

As with the change in businesses, many sub sectors within Professional Services experienced employment growth over the five year period. The most significant were Architectural & Engineering Services; Other Prof. & Tech. Services; and Services to Buildings & Dwellings. Waste collection saw the biggest decline.

4-DIGIT NAICS	DESCRIPTION	2003 EMP	2004 EMP	2005 EMP	2006 EMP	2007 EMP	5 YEAR CHANGE	5 YEAR % CHANGE
5411	Legal Services	676	696	720	744	735	59	8.73%
5412	Accounting & Bookkeeping	383	400	411	442	455	72	18.80%
5413	Architectural & Engineering Services	350	392	502	581	640	290	82.86%
5414	Specialized Design Services	56	86	92	87	102	46	82.14%
5415	Computer Systems Design & Related	75	68	69	90	128	53	70.67%
5416	Management & Tech. Consulting Svcs.	232	367	284	270	256	24	10.34%
5417	Scientific Research & Dev. Services	49	52	56	58	61	12	24.49%
5419	Other Prof. & Tech. Services	504	508	660	755	803	299	59.33%
5511	Management of Companies	246	243	318	325	337	91	36.99%
5611	Office Administrative Services	ND	92	106	116	ND	NA	NA
5612	Facilities Support Services	ND	ND	ND	ND	ND	NA	NA
5613	Employment Services	978	1,191	1,586	1,636	1,361	383	39.16%
5614	Business Support Services	456	411	403	345	314	-142	-31.14%
5615	Travel Arrangement & Reservation Svcs.	82	ND	ND	95	107	25	30.49%
5616	Investigation & Security Services	244	247	270	260	281	37	15.16%
5617	Services to Buildings & Dwellings	1,186	1,277	1,226	1,437	1,458	272	22.93%
5619	Other Support Services	182	126	236	ND	158	-24	-13.19%
5621	Waste Collection	131	10	11	11	19	-112	-85.50%
5622	Waste Treatment and Disposal	ND	155	69	45	50	NA	NA
5629	Remediation & Other Waste Services	ND	26	31	31	59	NA	NA

ND: Not disclosable – data do not meet BLS or State agency disclosure standards, NA: Not available due to missing data  
 Source: BLS Quarterly Census of Employment and Wages



**APPLIED**MARKETING  
*identifying and creating opportunities*

MARION COUNTY PEER COMPARISON

**TOTAL EMPLOYMENT**

The table below lists the total employment by NAICS Super Sector for Marion County and its peer counties. For the most part, Marion County is similar to its peers within Florida in terms of largest employment sectors. However, there are significant differences between Marion and Elkhart and Kosciusko Counties. These counties have a significantly higher number of manufacturing employees. Manufacturing is also the largest sector by far for both counties.

INDUSTRY	MARION COUNTY	ALACHUA COUNTY	PASCO COUNTY	POLK COUNTY	DOUGHERTY COUNTY	LOWNDES COUNTY	ELKHART COUNTY	KOSCIUSKO COUNTY
Base Industry: Total, all industries	86,564	86,850	83,483	177,226	40,610	39,690	116,282	32,110
Natural Resources and Mining	2,819	762	1,045	5,666	468	504	214	467
Construction	10,226	6,098	10,516	14,626	1,974	2,667	4,062	1,164
Manufacturing	9,428	4,567	3,798	17,111	5,727	5,330	62,229	14,771
Trade, Transportation, and Utilities	23,105	18,969	21,906	47,538	10,514	11,776	17,730	5,058
Information	1,909	1,955	799	2,141	977	571	778	456
Financial Activities	5,695	6,218	4,652	11,485	1,772	1,661	3,097	783
Professional and Business Services	7,598	10,252	9,220	29,618	4,723	4,405	7,994	2,066
Education and Health Services	12,676	20,735	16,469	26,798	8,357	4,829	10,276	3,816
Leisure and Hospitality	10,314	13,552	11,677	16,974	4,408	6,837	7,214	2,507
Other Services	2,720	3,707	3,321	5,212	1,659	1,100	2,685	1,021
Unclassified	73	34	79	58	31	12	3	3

Source: BLS Quarterly Census of Employment and Wages



**PERCENTAGE OF EMPLOYMENT**

In looking at the percentage of employment by NAICS Super Sector, Marion County again compares similarly to the Florida Counties. Marion has a much lower percentage of Professional & Business Services while having a larger percentage of Manufacturing employment. In general, Marion is most similar to Polk County in percentage of employment. Again, Elkhart and Kosciusko Counties are very dissimilar to Marion County. Both have significantly higher percentages of Manufacturing employment.

INDUSTRY	MARION COUNTY	ALACHUA COUNTY	PASCO COUNTY	POLK COUNTY	DOUGHERTY COUNTY	LOWNDES COUNTY	ELKHART COUNTY	KOSCIUSKO COUNTY
Base Industry: Total, all industries	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
Natural Resources and Mining	3.26%	0.88%	1.25%	3.20%	1.15%	1.27%	0.18%	1.45%
Construction	11.81%	7.02%	12.60%	8.25%	4.86%	6.72%	3.49%	3.63%
Manufacturing	10.89%	5.26%	4.55%	9.65%	14.10%	13.43%	53.52%	46.00%
Trade, Transportation, and Utilities	26.69%	21.84%	26.24%	26.82%	25.89%	29.67%	15.25%	15.75%
Information	2.21%	2.25%	0.96%	1.21%	2.41%	1.44%	0.67%	1.42%
Financial Activities	6.58%	7.16%	5.57%	6.48%	4.36%	4.18%	2.66%	2.44%
Professional and Business Services	8.78%	11.80%	11.04%	16.71%	11.63%	11.10%	6.87%	6.43%
Education and Health Services	14.64%	23.87%	19.73%	15.12%	20.58%	12.17%	8.84%	11.88%
Leisure and Hospitality	11.91%	15.60%	13.99%	9.58%	10.85%	17.23%	6.20%	7.81%
Other Services	3.14%	4.27%	3.98%	2.94%	4.09%	2.77%	2.31%	3.18%
Unclassified	0.08%	0.04%	0.09%	0.03%	0.08%	0.03%	0.00%	0.01%

Source: BLS Quarterly Census of Employment and Wages

## LOCATION QUOTIENT COMPARISON

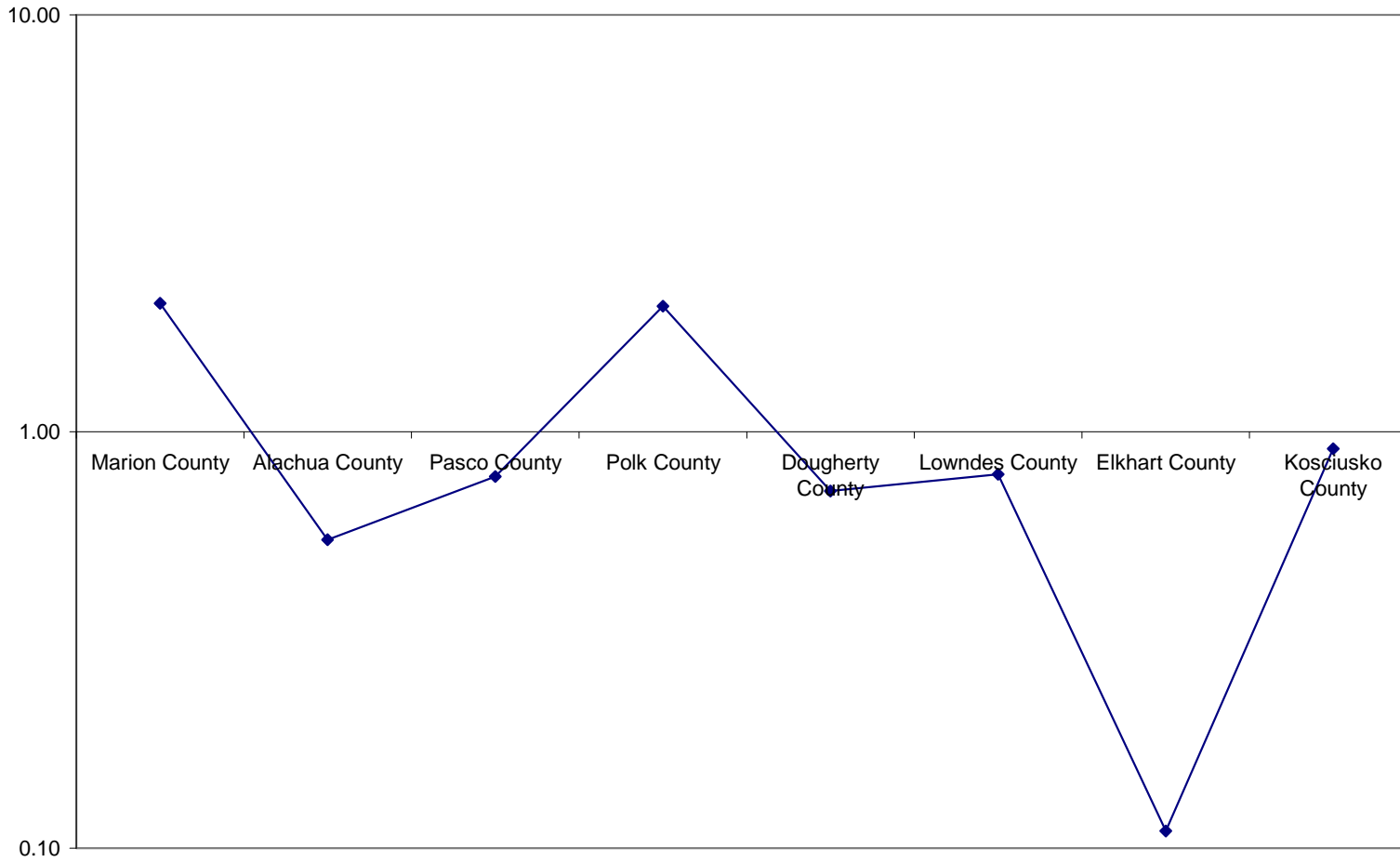
The location quotient comparison below and on the next several pages compare and contrast employment within Marion County to its peer counties. Based on this analysis, Marion County’s economy is most similar to Polk County. The charts on the following pages illustrate the similarities and differences of employment across the NAICS Super Sectors for each county. Significant findings include:

- ⦿ Marion County has a much higher share of Natural Resources and Mining employment – although it’s very similar to Polk County
- ⦿ Marion County and Florida counties in general have a much higher share of Construction employment
- ⦿ Although Marion County has the highest share of manufacturing employment compared to the Florida counties, it is lower than the U.S. average and much lower than Elkhart and Kosciusko Counties
- ⦿ Marion County’s share of Professional and Business Services employment is the lowest amongst the compared Florida counties

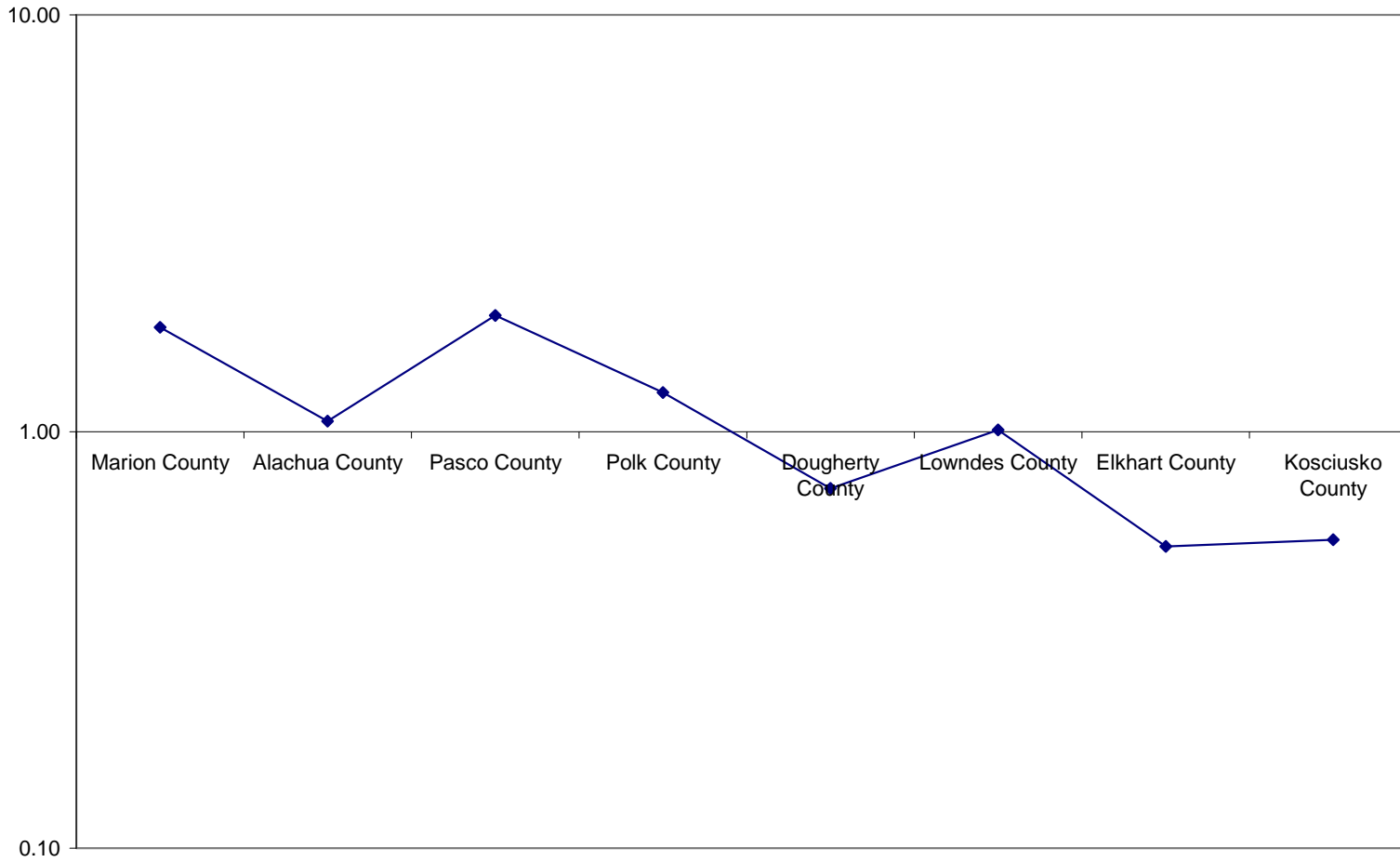
INDUSTRY	MARION COUNTY	ALACHUA COUNTY	PASCO COUNTY	POLK COUNTY	DOUGHERTY COUNTY	LOWNDES COUNTY	ELKHART COUNTY	KOSCIUSKO COUNTY
Base Industry: Total, all industries	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Natural Resources and Mining	2.03	0.55	0.78	2.00	0.72	0.79	0.11	0.91
Construction	1.78	1.06	1.90	1.24	0.73	1.01	0.53	0.55
Manufacturing	0.90	0.43	0.37	0.80	1.16	1.11	4.41	3.79
Trade, Transportation, and Utilities	1.16	0.95	1.14	1.16	1.12	1.28	0.66	0.68
Information	0.83	0.85	0.36	0.45	0.91	0.54	0.25	0.53
Financial Activities	0.92	1.00	0.78	0.91	0.61	0.59	0.37	0.34
Professional and Business Services	0.56	0.75	0.71	1.07	0.74	0.71	0.44	0.41
Education and Health Services	0.96	1.56	1.29	0.99	1.35	0.80	0.58	0.78
Leisure and Hospitality	1.02	1.33	1.20	0.82	0.93	1.47	0.53	0.67
Other Services	0.81	1.10	1.02	0.76	1.05	0.71	0.59	0.82
Unclassified	0.44	0.21	0.50	0.17	0.40	0.16	0.01	0.05

Source: BLS Quarterly Census of Employment and Wages

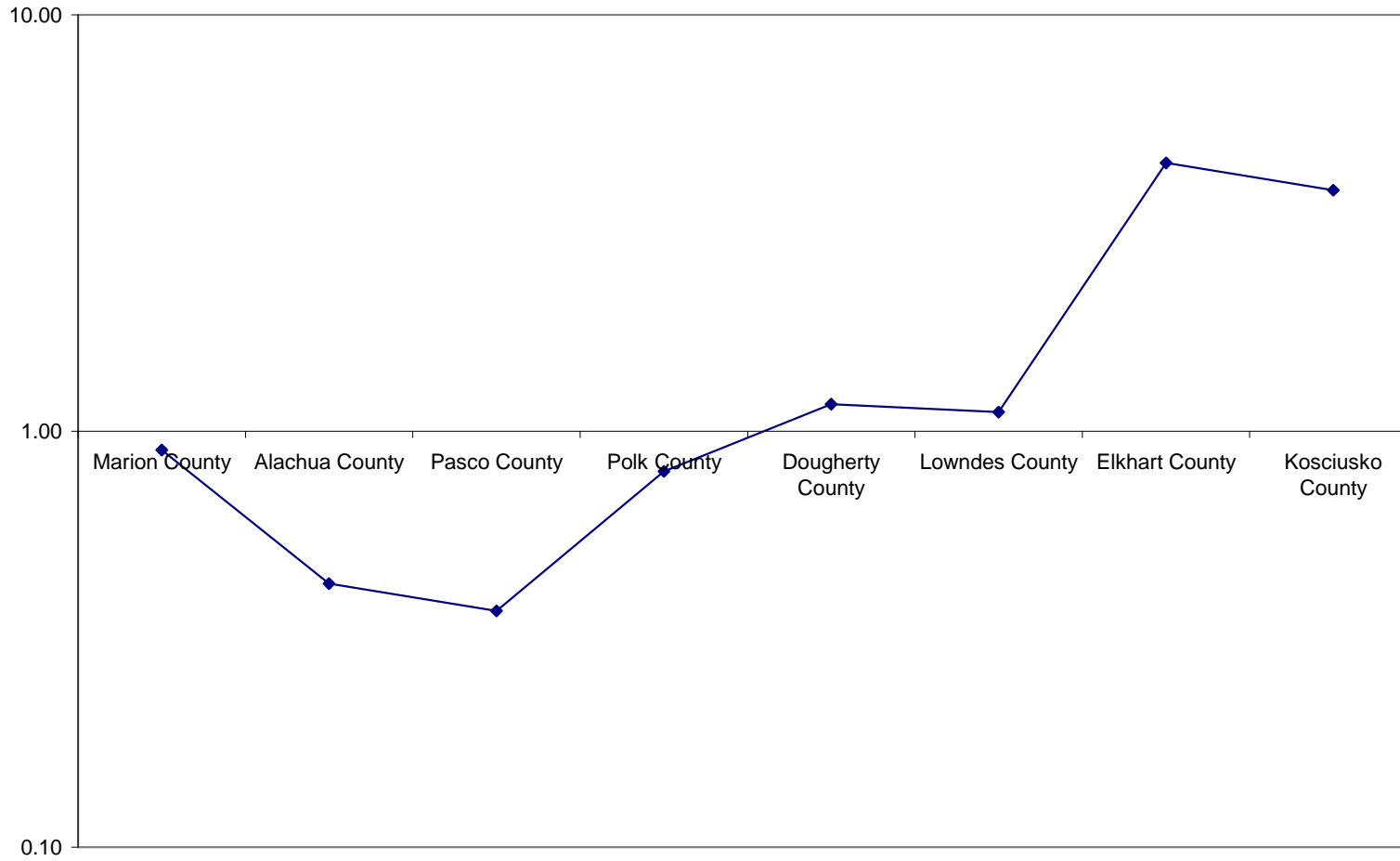
**Natural Resources and Mining Location Quotient**



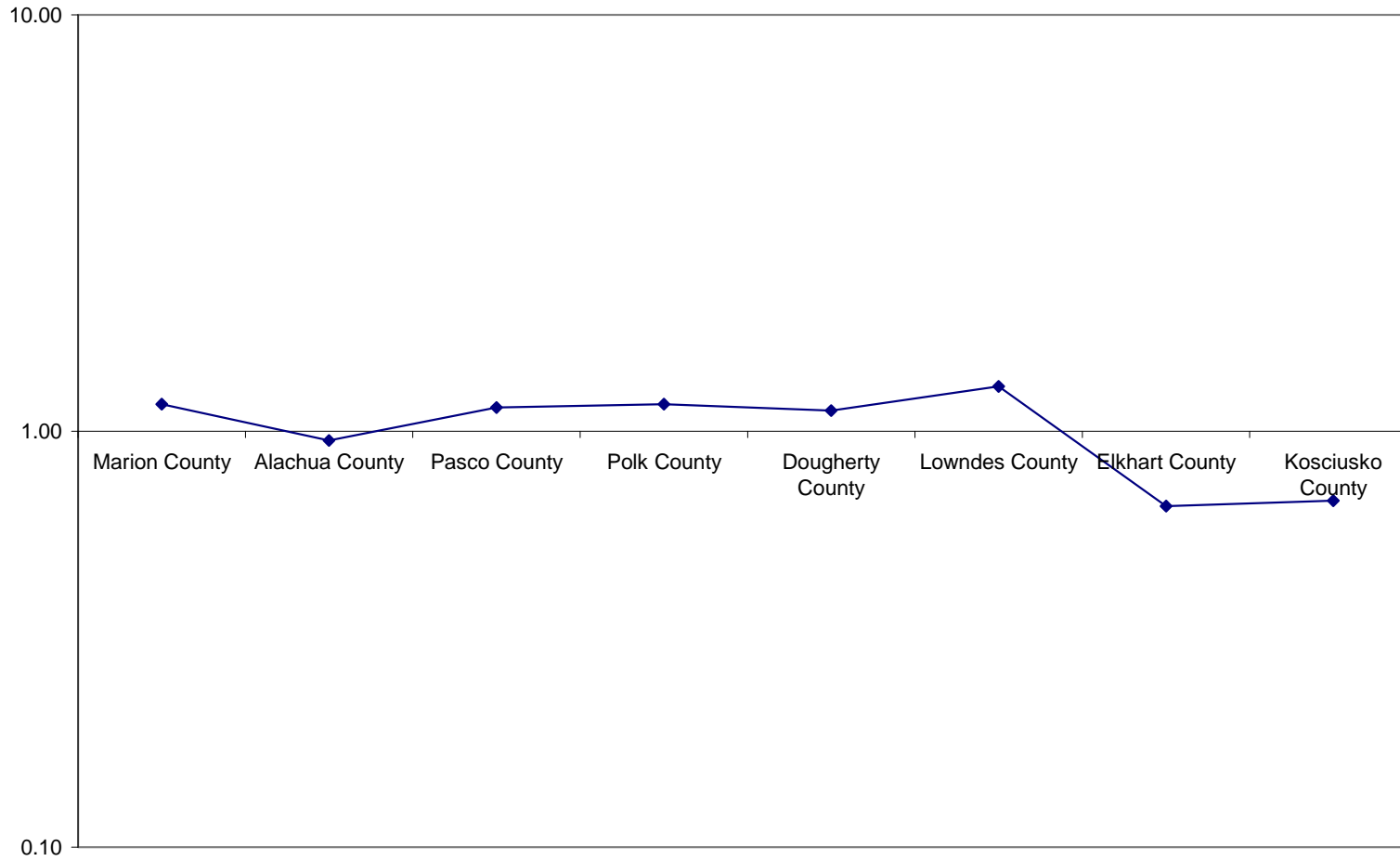
**Construction Location Quotient**



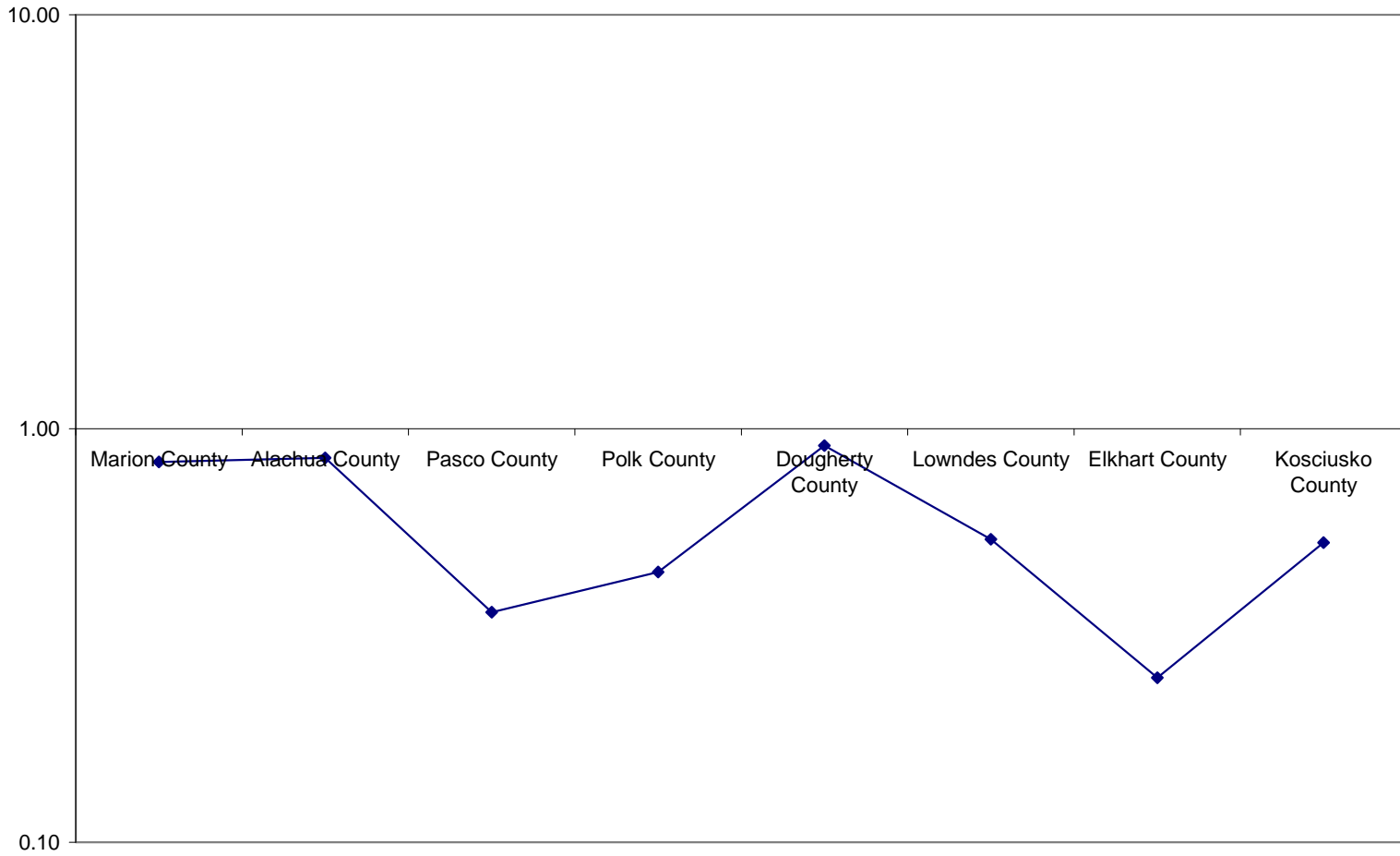
**Manufacturing Location Quotient**



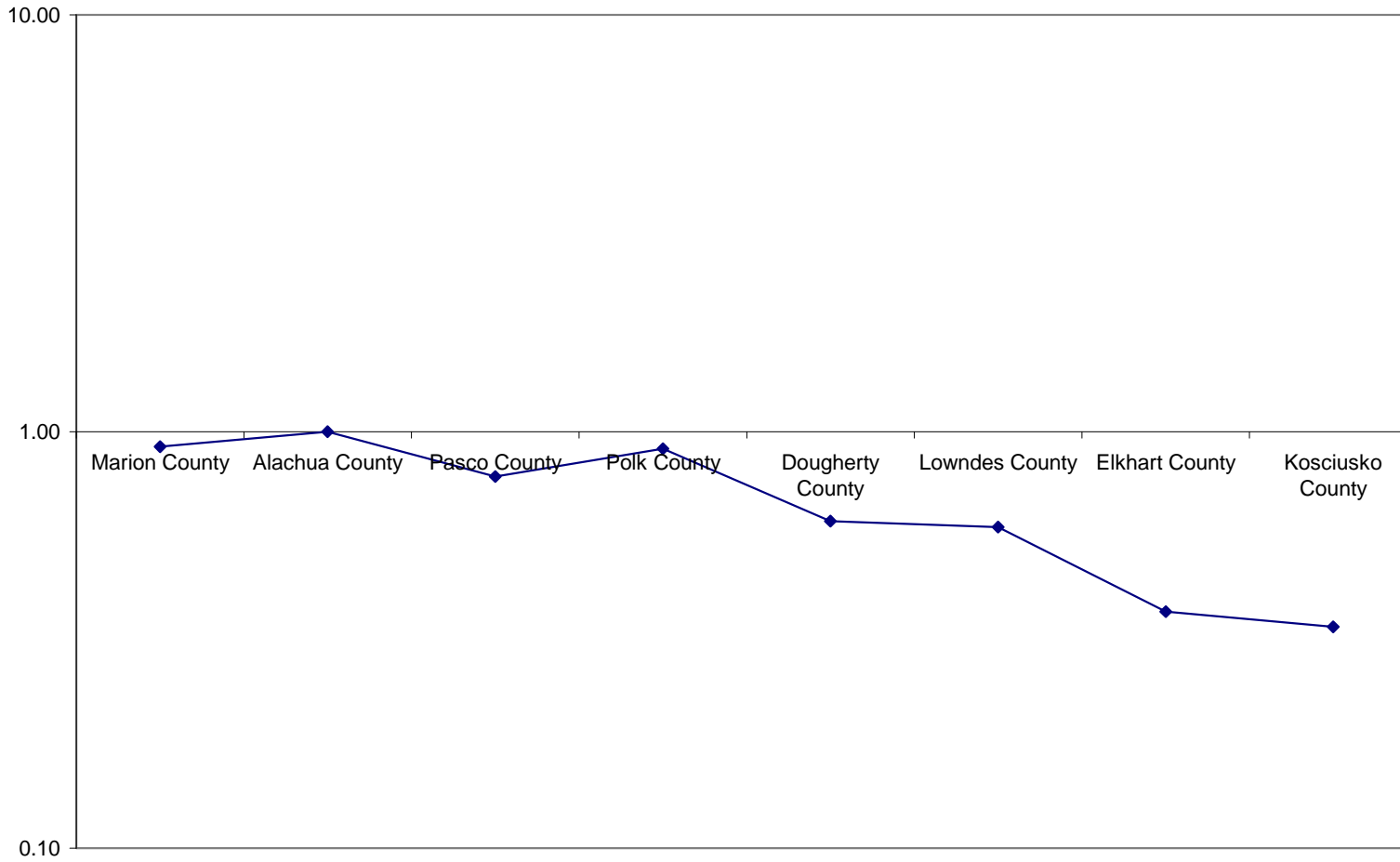
**Trade, Transportation, and Utilities Location Quotient**



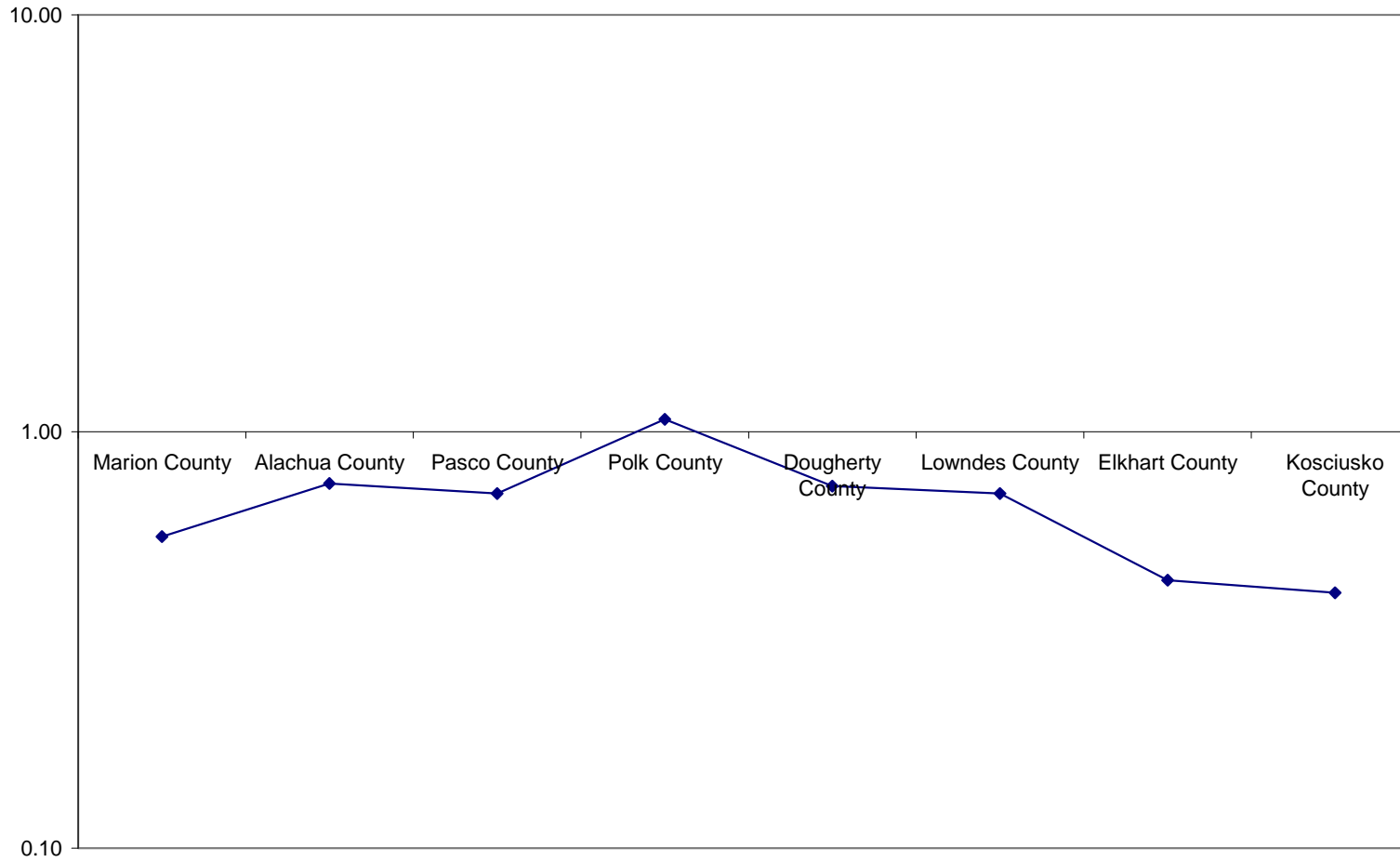
**Information Location Quotient**



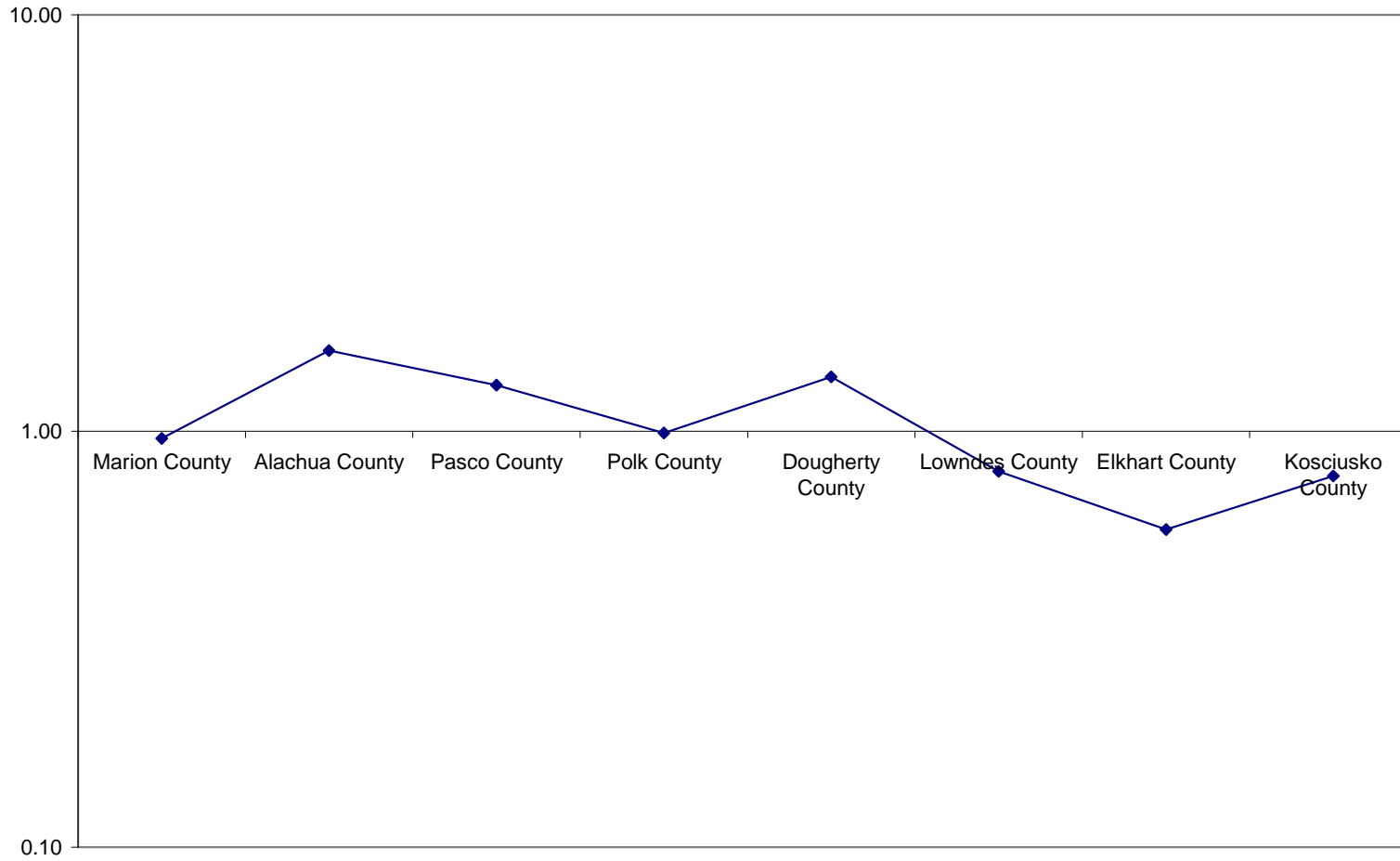
**Financial Activities Location Quotient**



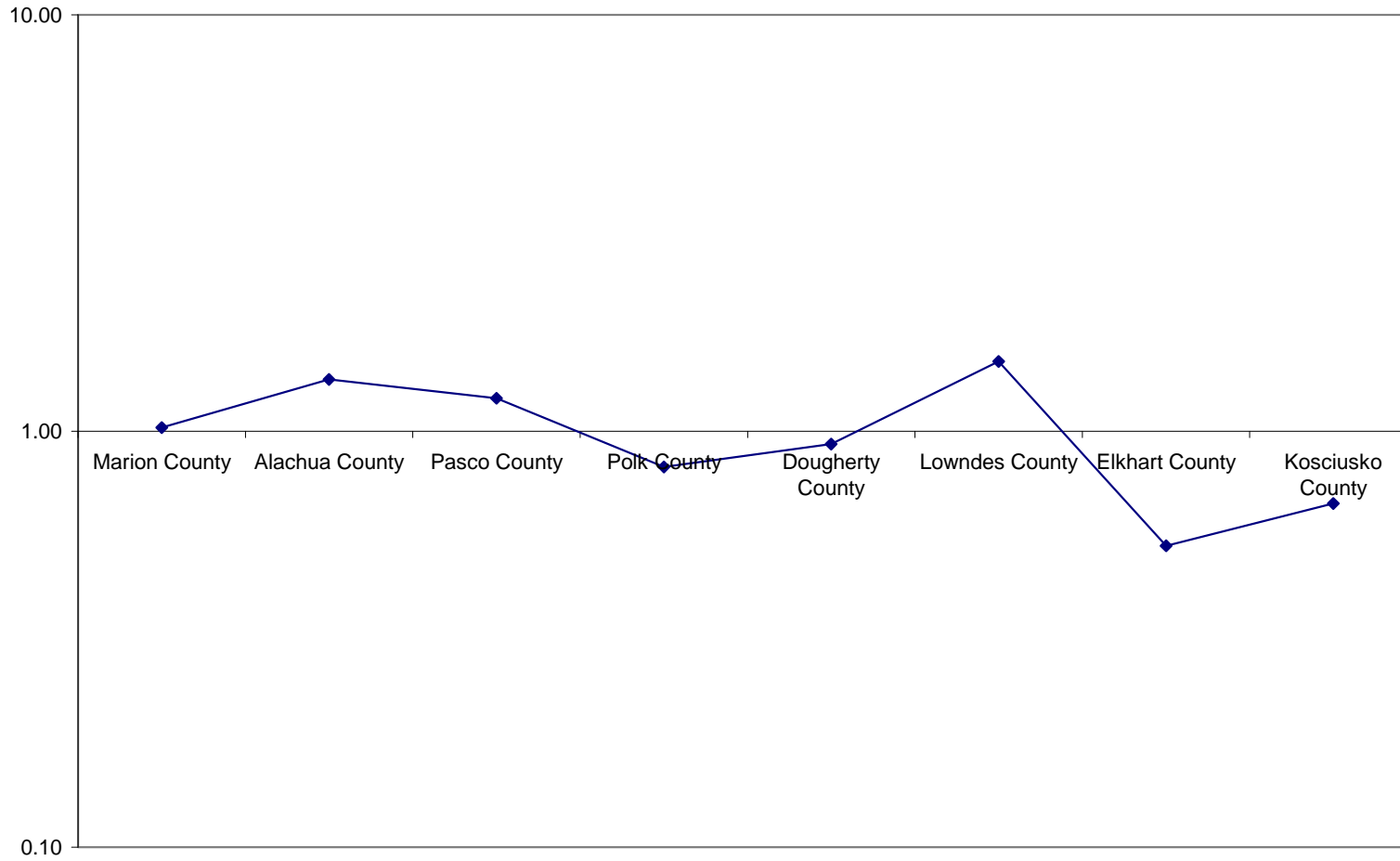
**Professional and Business Services Location Quotient**



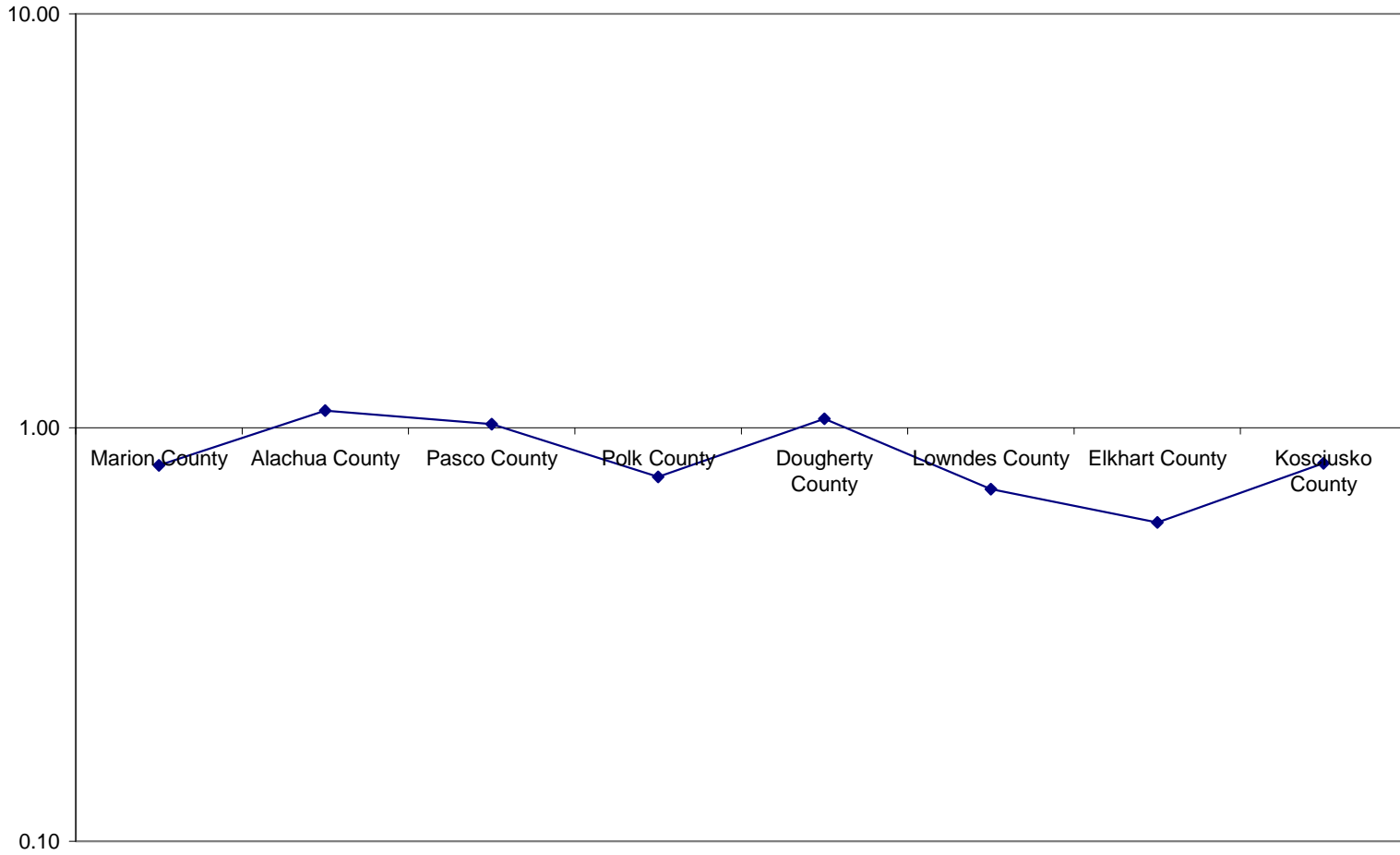
**Education and Health Services Location Quotient**



**Leisure and Hospitality Location Quotient**



**Other Services Location Quotient**



**Unclassified Location Quotient**

