

Garner
Economic Development solutions that work

Leading Through **ACTION**

An Economic Development Strategy
For Santa Rosa County, FL



Santa Rosa County, Florida

November, 2022

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Executive Summary

In July 2022, the Santa Rosa County Economic Development Office (Santa Rosa EDO) retained Garner Economics, LLC to update the economic development strategy for Santa Rosa County, Florida. In 2017, Garner Economics conducted the County's first comprehensive assessment of the area's economic development competitiveness and service delivery. This resulted in a road map to enhance economic development efforts detailed in an action plan published in 2018. Five years after the original report, Garner Economics was asked by the County to refresh and recalibrate this economic development action plan.

LEADING THROUGH ACTION: AN ECONOMIC DEVELOPMENT STRATEGY FOR SANTA ROSA COUNTY, FL provides renewed focus on asset development, marketing, and organizational changes Santa Rosa County and its economic development partners should take to keep the County on a trajectory of success. This plan will help the County attract and retain businesses, create jobs, and nurture opportunities to attract talent.



COMPETITIVE REALITIES REVIEW: CURRENT STANDING OF SANTA ROSA COUNTY

Analysis and Assessments

In September 2022, Garner Economics published a summary of the Phase One discovery process, called the **COMPETITIVE REALITIES REPORT (CRR)** — a compilation of local and regional facts and data points. The Assets & Challenges Assessment, Stakeholder Engagement Summary, and Economic and Community Analysis informed the work to verify or identify new target opportunities for Santa Rosa County and to formulate recommendations to enhance the County's economic vitality and its ability to both attract and retain companies and talent.

Stakeholder Input

To complement the assessment of the physical and regulatory structure of Santa Rosa County, Garner Economics conducted three focus groups of key stakeholders in the area via virtual means and distributed an electronic survey to reach the county's broader stakeholders. The purpose of these exercises was to solicit a variety of perceptions of the business climate, brand perceptions, and areas for improvement from community stakeholders.

Additionally, Garner Economics conducted one-on-one interviews with each County Commissioner and senior staff of the County to solicit their feedback related to areas of opportunities and challenges in the County. Common perceptions and concerns touched on the imperative of talent attraction, retention, and the county's lack of housing for the workforce.

164
Total Stakeholder contacts

121
E-Survey Responses

3
Focus Groups

The business climate was rated stronger than average with an overall score of 3.4 from survey and focus group participants. A majority of respondents felt that the business climate has stayed the same or improved since the 2018 study.

Participants lauded the county’s innovative use of Triumph Funds, particularly in developing industrial sites. Regarding economic development efforts, stakeholders noted the Santa Rosa County EDO seemed overstretched and under-resourced. County officials noted some program areas could receive additional focus such as small business and entrepreneurship and existing businesses of all sizes.

Additional details on stakeholder feedback can be found in chapter 2 of the [CRR](#).

Assets & Challenges Assessment

The Assets & Challenges Assessment (A&C) is an important part of Garner Economics’ approach to the evaluation of a community. The A&C includes both an objective and subjective appraisal of the area obtained through a windshield tour and reviewing the area from a site-selection perspective. The County had previously gone through a detailed, predetermined list of 61 criteria and a community tour during the 2017 study, and again during a prospect site visit in 2021.

For this report, Garner Economics once again visited and assessed the county based on the qualities, elements, and infrastructure that a business will look for when considering the county as a place for its operations. A comparison of 2017 and 2022 showed that Santa Rosa County improved in the number of positive ratings as well as fewer challenges since 2017.

This assessment allows us to document challenges that exist in the county that constitute potential barriers to successful economic development to occur. By knowing what challenges or gaps exist, the Santa Rosa EDO and its partners can take the steps necessary to mitigate the situation, strengthen its overall “product,” and be a more attractive business location.

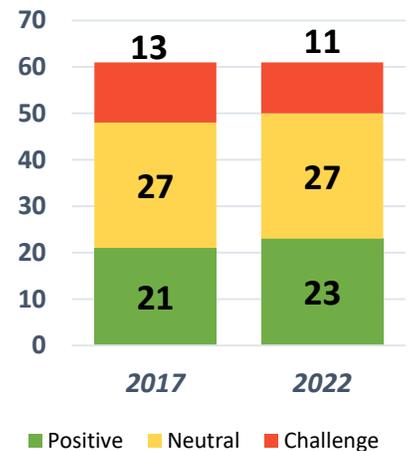
Additional details on the A&C can be found in chapter 3 of the [CRR](#).

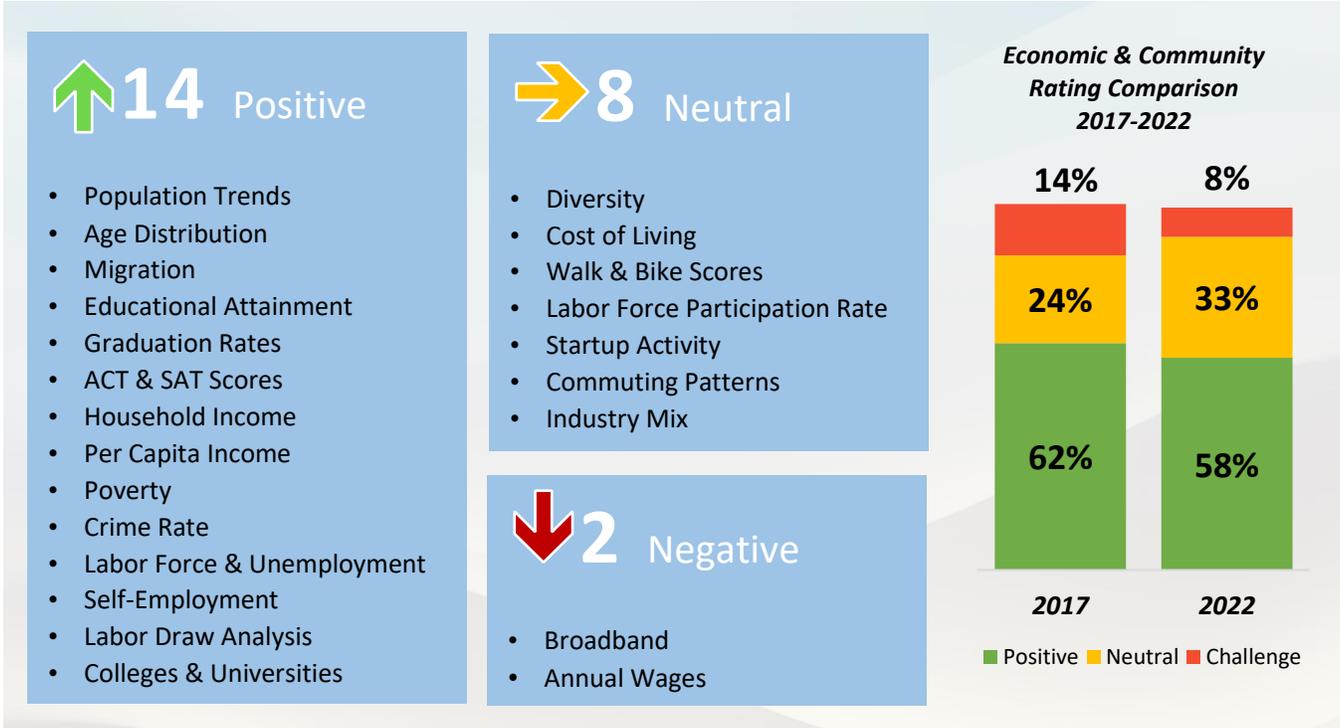
Economic & Community Assessment

The Garner Economics team approached this refresh and assessment of the progress made in the county with the same analytical and data-driven rigor as the original strategy. Santa Rosa County’s economic position and competitiveness were assessed by measuring the change and comparing it to itself over time as well as benchmarks. As a complement to the Assets & Challenges Assessment work, the team examined data sets that reveal the county’s position relative to the benchmark counties of Bay County, Florida and Onslow County, North Carolina, along with the Pensacola Metro, state of Florida, and the national average.

Metrics analyzed for the process were rated showing positive, neutral, or negative indicators. Relative to Santa Rosa County's position in 2017, there are fewer positive ratings, more neutral measures and fewer indicators that are considered a challenge. The ratings presented below are included in further detail in the [CRR](#).

Assets & Challenges Rating Comparison 2017-2022





SANTA ROSA COUNTY PROGRESS REPORT CARD

As noted earlier, Garner Economics helped create a roadmap for the County to generate economic opportunities in late 2017 and early 2018. The plan contained a set of actionable recommendations to ensure the Santa Rosa EDO and its partners could attain the goal of increasing its competitive advantage in business development and economic growth.

Since this report of 2017/18, the Santa Rosa EDO has been working to move the county forward toward the goal of effective economic growth and has made evident progress in completing the majority of the recommendations. These were presented in several categories: **Enhance the Product, Tell the Story (marketing), and Execute Effectively (organizational).**

# of 2018 Recommendations	Status Indicator	Status
9	✓	Complete
3	○	Partially Complete
4	●	Started/In progress
4	↻	On-going
0	✗	Not Started

TARGET BUSINESS SECTORS

Driven by desirability and feasibility screening, five target business families are recommended as a good fit for Santa Rosa County based on the current economic and business climate conditions. Garner Economics worked to validate existing targets, look for new opportunities, and group business sectors in target families that are thematically similar or leverage the same assets within the county.

Together, the targets will help the County continue to grow and diversify its economic base, as well as mitigate identified challenges. The targets are recommended given the County’s attributes, assets, and proximity to other economic drivers. Each target group is outlined in chapter 3 of this report with a target profile containing valuable data and narrative to support the selections later in the report. The five target families are *Distribution*, *All Things Aviation*, *Industry 4.0 (Manufacturing)*, *Cybersecurity & Facility Tech*, and the *Experiential Economy*.

Optimal Business Sectors for Santa Rosa County



RECOMMENDATIONS

In conducting this analysis, the Garner Economics team found that Santa Rosa County has been successful with considerable improvement since the first Garner Economics strategic plan in 2017. Santa Rosa County is well poised to further set itself apart and continue to grow; however, the County must be proactive in driving the community’s economic future and setting it apart from peers and competitors.

Chapter 4 offers a set of implementable recommendations that will help Santa Rosa County Economic Development better focus its efforts to attract high-quality companies and talent and position the County to leverage the next wave of economic growth. The recommendations also set a foundation the community can build upon to become an optimal business location.

The recommendations reflect items that Santa Rosa County and other economic development partners should undertake to mitigate the current product challenges and better position itself to site-location advisers or companies in the identified target business sectors. The recommendations also include tactics the County can use to leverage strengths and effectively market to those targets.

The recommendations proposed in **LEADING THROUGH ACTION: AN ECONOMIC DEVELOPMENT STRATEGY FOR SANTA ROSA COUNTY, FL** call on the County to enhance its economic development service delivery, reposition marketing efforts to target specific business clusters, and advocate for initiatives that will build upon and improve available product offerings and overall business climate. By highlighting its unique advantages and existing assets, Santa Rosa County can shape its economic future and encourage the business and talent growth the community desires.

Recommendations Summary

Strategy		Action
	Asset Development (Product Improvement)	<ol style="list-style-type: none"> 1. *Develop a sports complex for local use and as a destination attraction in amateur sports. 2. *Create an Entrepreneurial Center (or Knowledge Center) that would include a small-business incubator and makerspace. 3. Undertake a housing analysis to determine mid to long-term housing options and affordability in Santa Rosa County. 4. Develop an industrial spec building in the new Milton Interchange Industrial Park.
	Communicate (Marketing)	<ol style="list-style-type: none"> 1. Communicate regularly with the County Commission on all things economic development. 2. Return to having a more proactive external outreach to companies and consultants. 3. Develop a Santa Rosa community pride campaign.
	Execute Effectively (Organizational)	<ol style="list-style-type: none"> 1. Add one additional full-time staff person to the County's Economic Development Office, focusing on BRE and entrepreneurship. 2. Conduct economic and community development leadership learning labs in other inspirational communities (community visits).

(*) denotes a transformative recommendation that could have a significant positive impact on the area if implemented

Chapter 2: Santa Rosa County Progress Report

Garner Economics had the privilege of working with the Santa Rosa County Economic Development Office (Santa Rosa EDO) in late 2017 and early 2018 to help create a roadmap for the County to generate economic opportunities for its citizens. The end goal of the Plan was to understand where Santa Rosa County stood, what economic development opportunities were available, and to create a set of actionable recommendations to ensure the Santa Rosa EDO and its partners could attain its goal of increasing its competitive advantage in business development and economic growth.

Since 2018, the Santa Rosa EDO has made marked progress in completing the majority of the recommendations.

Progress to date

In addition to conducting an Assets and Challenges assessment to quantify the improvement in the County's competitiveness in attracting and retaining business investments, Garner Economics reviewed the implementation of the original strategy recommendations with the Santa Rosa EDO team and queried stakeholders on their perspectives on improvements to the area's business climate since 2018.

The tables below illustrate the progress the Santa Rosa EDO has made in implementing the 2018 strategy recommendations.

Santa Rosa County Progress Report for 2018 Recommendations

I. Enhance the Product		
Recommendation	Status	Notes
Continue to develop a real estate portfolio and develop a speculative building		The Santa Rosa EDO has worked to create the new Milton Interchange Park to be eco-friendly with walking paths and other amenities. Santa Rosa Industrial Park East has LOIs in place for all parcels. The park will focus on heavy industrial users. RFQ's were issued for a spec building in the I-10 Industrial park, but received no responses.
Invest in necessary infrastructure at Peter Prince and/or the proposed Whiting Air Park to enhance the viability of recruiting aviation-related companies		A spec hangar for Leonardo Helicopters was built at the Peter Prince Airport. An ILS system at Peter Prince will not work due to the length of the runway without disruptive (to NAS Whiting Field) expansion.
Create a plan to improve gateways into the County.		The City of Milton has added signage and landscaping to gateways into the city. The Tourist Development office created new signage and landscaping in the southern end of the county. There is also landscaping at the gateway entering Pace from Pensacola.
Plan and Strategize for a "Better Santa Rosa County" by conducting a county-wide land use amenities plan		The current County Comprehensive plan was approved in 2016 and runs through 2040. Amendments to the plan allow for planning separately for individual geographic areas of the County. The Tourist Development Offices provides grants for placemaking developments
Enhance the entrepreneurial ecosystem.		The Santa Rosa EDO has partnered with the University of West Florida Small Business Development Center to further enhance the County's entrepreneurship and small business training efforts.
Look long-term for sustainable funding for economic development and product improvement		The County has used Triumph Gulf Coast funds for several capital investments, including improvements to Whiting Aviation Park, support for Project Lionheart, the Milton Interchange Park, and the Santa Rosa Industrial Park East
Support plans for increased water and wastewater capacity in Santa Rosa County		The Santa Rosa EDO is helping to build a waste-water treatment facility for the Milton Interchange Park
Update the County's Incentive Policy		The current incentive policy includes land pricing guidelines (for publicly owned lands); the Santa Rosa EDO is currently in the process of assessing industrial land value and will update the incentive policy for those properties accordingly.

 Not Started
  Started/In progress
  Partially Complete
  Complete
  On-going

II. Tell the Story		
Recommendation	Status	Notes
Craft Santa Rosa County’s story by defining key messages & themelines	✓	The Santa Rosa EDO created an ongoing marketing campaign in both print and digital that focuses on available properties and workforce.
Launch a Digital Ambassadors campaign: Turn to Santa Rosa County residents to amplify key messages.	✓	The initial digital ambassador efforts did not receive traction among local partners. The EDO has channeled efforts to building followings on LinkedIn and Facebook.
Advance Santa Rosa EDO’s Online Presence: Take the website to the next level.	✓	The Santa Rosa EDO uses geofencing at conferences and tradeshows to drive traffic to the website. Content is continually updated with a version for desktop viewing and a mobile-friendly version.
Go Social: Rethink the approach to digital media	✓	The Santa Rosa EDO uses LinkedIn and Facebook as the primary vehicle for social media to site consultants and national brokers. The EDO Director has begun writing articles on the impact of economic development efforts for the local newspaper.
Influence the Influencers: Cultivate relationships with national site selection consultants and area real estate brokers	✓	The Santa Rosa EDO has built relationships with brokers through the Society of Industrial and Office Realtors, as well as through CoreNET and the Industrial Asset Management Council.
Smart Collateral: Test a new approach	✓	Some digital content was built. The EDO continues to use print collateral; it has seen more success with those pieces.
Leverage Trade Shows: Focus on “owning” rather than attending the show.	✓	The EDO schedules one-on-one meetings during trade shows rather than only walking the floor.
Partner Marketing: Strengthen relationships with the “Big Dogs.”	✓	The EDO has worked to build strong ties with local and state representatives and continually briefs them on current projects occurring in Santa Rosa County. The Santa Rosa County Commissioners (BOCC) are kept apprised of projects. More work is needed to keep expectations in check – especially in terms of the long lead time in cultivating and landing projects.
Out-of-the-Box: Create dimensional direct mail for best-bet companies.	✓	Created postcard mailers for targeted companies and the retail sector

III. Execute Effectively		
Recommendation	Status	Notes
Reorganize the Santa Rosa EDO to effectively seize on current and future economic opportunities and create an advisory board of directors.		The Department was reorganized per the recommendations. No advisory board of directors has been formed. The Santa Rosa EDO is participating in First Place Partners, which was formed to assist in economic development for Escambia and Santa Rosa Counties. The First Place Partners' board serves as an advisory board for the EDO's work.
Engage a firm to analyze the County's best effort to attract retail in order to enhance the area's quality of place assets		The County hired a firm to assist in retail attraction but the results were not effective and the contract was not renewed.
Conduct annual economic development briefing workshops (ED 101) for the community at large for a better understanding of the local economic development process.		In addition to the articles noted above and the briefings for BOCC members, the Santa Rosa EDO speaks regularly at Rotary and chamber events.

 Not Started
  Started/In progress
  Partially Complete
  Complete
  On-going

Chapter 3: Optimal Targets for Santa Rosa County

The optimal business sector selections are based on the specific characteristics of the economy and assets of Santa Rosa County, Florida. Garner Economics worked to validate existing targets, look for new opportunities, and group business sectors in target families that are thematically similar or leverage the same assets within the county. The recommended target families are designed to assist the County and its economic development efforts in prioritizing resources and focusing on sectors in which Santa Rosa County holds a competitive advantage, has growth potential, and/or improves the quality of place. This approach will help policymakers prioritize the County’s community and economic development strategy.

Garner Economics uses a desirability and feasibility screening matrix to determine the optimal targets. Desirability begins by considering the types of business sectors that stakeholders of Santa Rosa County would like to see in the community (Figure 3.1). Feasibility includes what the County can reasonably achieve short- to mid-term, based on current or planned locational assets and an analytical review of the economy.

Using results from the previously completed **COMPETITIVE REALITIES REPORT**, the **ASSETS AND CHALLENGES ASSESSMENT**, focus groups, a community survey, and field visits, five target families were chosen that best match Santa Rosa County’s unique competitive advantages. These targets are presented as collaborative, community targets led by Santa Rosa County EDO or other relevant organizations such as the Chamber of Commerce, the Convention & Visitors Bureau, etc. These targets are *Distribution*, *All Things Aviation*, *Industry 4.0 (Manufacturing)*, *Cybersecurity & Facility Tech*, and *Experiential Economy*.

Figure 3.1: Optimal Target Screening Process



- **Distribution**
- **All Things Aviation**
- **Industry 4.0 (Manufacturing)**
- **Cybersecurity & Facility Tech**
- **Experiential Economy**

For each targeted business sector, the community’s competitive advantages are presented along with national trends and projections of the targets. Target sectors may be stagnant or losing jobs nationally, but the particular set of economic development assets in Santa Rosa County position it to capture any growing demand to produce new jobs and improve gross domestic/regional product.

For each target, a list of individual subsectors with accompanying NAICS classifications as well as a list of rationales that are identified as appealing to the needs of prospects (P) or the community (C) is presented. This material can be used in marketing and community support efforts or to help economic development personnel prioritize targeting efforts.

Figure 3.2 Optimal Business Targets for Santa Rosa County, FL



Distribution	All Things Aviation	Industry 4.0	Cybersecurity & Facility Tech	Experiential Economy
<ul style="list-style-type: none"> • Warehousing & Storage • Trucking, Local & Long-Distance • 3rd Party Logistics Services • Wholesale Trade Agents/Brokers • Transportation Equipment and Supplies Distribution • Cold Storage Facilities 	<ul style="list-style-type: none"> • Navigation and Aeronautical System Mfg. • Aircraft Engine and Parts Mfg. • Other Aircraft Parts and Auxiliary Equipment Mfg. • Support Activities for Air Transportation • Aircraft Maintenance, Repair & Overhaul • Flight Training Schools • Electronic and Precision Equipment Repair and Maintenance 	<ul style="list-style-type: none"> • Small & Medium sized Mfg. • Processing & Engineering Services • Metal Fabrication & Stamping • Recreational Boat Building • Electrical Equipment Mfg. 	<ul style="list-style-type: none"> • IT & computer systems design • Engineering Services • Facilities Support Services • Data science & analytics 	<ul style="list-style-type: none"> • Destination Sporting Facilities & Events* • Sporting & Athletic Goods Mfg. • Diverse retail options

**Aspirational*



Distribution has been on a meteoric rise nationwide accelerated in part by the COVID-19 pandemic which saw e-commerce grow in the daily lives of Americans. The widespread scramble to secure supply chains and establish the optimal network to deliver e-commerce goods has created a demand for distribution and fulfillment operations. While the pace has slowed, many industries are still building and expanding delivery networks for efficiency down to the last mile. This industry does have the caveat that all distribution projects will look at ways to be flexible and adaptive with global economic shifts.

With its location and transportation assets, Santa Rosa County is positioned to serve the greater region. Much of the modern distribution industry is geared toward the interstate highway system and the ability to transfer modes efficiently. Santa Rosa County is well served by I-10 running from east to west linking Jacksonville to Mobile, New Orleans, and points westward. While Mobile can be easily reached within 90 minutes of drivetime, additional markets such as Tallahassee, Montgomery, and Biloxi are also accessible. New Orleans and the suburbs of Jacksonville can be served within a five-hour drive. The area is served by a CSX rail line and is close to both the Pensacola and Mobile ports.

Top occupations in this industry based on employment levels include *Customer Service Representatives, Stockers and Order Fillers* as well as *Truck Drivers, and Software Developers*. The transportation industry has become sophisticated and requires varied skills with companies looking to optimize logistics leveraging computerized and automated supply chains that allow for adjustments and new scenarios as they develop.

The *Wholesale Trade* industry sectors experienced growth between 2017 and 2022 increasing by 12.8%. *Transportation and Warehousing* industry jobs increased by 6.9% as well. Table 3.1 lists specific NAICS codes to classify the target family subsectors, showing both national and regional trends and forecasts in employment and regional or gross domestic product (GDP).

Target rationales include:

- Positioned to serve regional market (P)
- Excellent interstate access (P)
- Rail service via CSX (P)
- Proximity to Pensacola & Mobile Ports (P)
- High number of military veterans in area with logistics & related skills (P) (C)
- Availability of distribution-oriented workforce (P) (C)
- *Transportation and Material Moving* occupations grew 23% in past 5 years (P)
- An existing pool of high-demand occupations and occupations with skills transferability (P)
- *Wholesale Trade* industry sector grew by 12.8% in past 5 years (P)
- *Transportation & Warehousing* industry sector grew by 7% in past 5 years (P)
- More than 1,692 degrees and certificates granted for in majors related to distribution & related services (P)(C)
- Within ½ hour of major university/ college (P)(C)
- Post-secondary vocational training (P)
- Relatively low cost of labor (P)
- Proximity to Pensacola Int'l Airport (P) (C)
- Availability of sites (P)
- Availability of local incentives (P)
- Relatively low cost of living (P)(C)
- Quality of education K-20+ (P) (C)

Legend: Items appealing to needs of prospects (P) or community (C).

Target rationales continued:

- Historical national 10-year job growth of 36.6% and 10-year GDP growth of 27.4% (P)(C)
- National job growth forecast 6% for next decade (P)(C)
- Santa Rosa County labor shed 10-year job growth of 33% and 10-year forecast of 10.6% (P) (C)
- Santa Rosa County 10-year GDP growth of 46.4% (P)(C)

Legend: Items appealing to needs of prospects (P) or community (C).

Table 3.1 Distribution Job & GDP Trend & Outlook, 2022
United States, Santa Rosa County 30-Minute Drive-Time, Santa Rosa County

NAICS	Industry	United States			Santa Rosa County 30-Minute Drive Time			
		10-Year % GDP Change	10-Year Employment Change %	10-Year Employment Forecast %	10 -year % GDP Change*	10-Year Employment Change %	10-Year Employment Forecast %	LQ
4841	General Freight Trucking	50.3%	13.7%	3.6%	78.6%	62.0%	9.8%	0.5
42386	Transportation Equipment and Supplies Wholesalers	32.7%	-0.4%	3.6%	n/a	-68.2%	9.2%	0.6
4251	Wholesale Trade Agents and Brokers	-12.4%	-40.3%	2.4%	6.1%	37.9%	7.2%	1.0
4885	Freight Transportation Arrangement	62.3%	35.3%	3.9%	1.4%	26.7%	10.1%	0.1
4931	Warehousing and Storage	113.5%	172.9%	7.7%	216.5%	-3.9%	12.6%	0.2
541614	Process, Physical Distribution, & Logistics Consulting Services	56.2%	53.1%	20.3%	62.3%	193.0%	25.6%	0.7
Total Target		27.4%	36.6%	6.0%	46.4%	33.1%	10.6%	0.4

* GDP figures are for Santa Rosa County only. Source: JobsEQ, Garner Economics

Occupations

Transportation and Material Moving was the second-largest occupation group by job growth in Santa Rosa County over the past five years gaining 623 jobs, a 23% increase. The top occupations for the Distribution target are a mix of jobs from a variety of fields and are derived from studying staffing patterns in the target industry family. These occupations are listed in Table 3.2 along with employment levels from several different aspects:

1. Those who work at companies located in Santa Rosa County, regardless of where workers reside.
2. Workers who live in Santa Rosa County within that occupation category, regardless of where they work.
3. People who live within a 30-minute drive from Santa Rosa County for each occupation. This figure is recommended to market the talent potential.

Location Quotients (LQ) are also included to illustrate concentration relative to the nation. An LQ figure shows the concentration of an industry or occupation in an area relative to the national level of concentration and is a good indicator of strength. An LQ of 1.2 or more is favorable showing a local specialization.

Education and training levels needed for entry into target occupations vary from no education needed and short-term on-the-job training to requiring a certificate, five years of experience, or moderate-term on-the-job training. Occupations in Table 3.2 show a variety of typical requirements showing the need for higher education and technical training.

Table 3.2 Distribution Target Top Occupations, 2022
Sorted by Employment-Live within 30-Minute Drive

SOC	Occupation	Employment (Work in County)	Employment (Live in County)	Employment (Live 30-Minute Drive)	LQ (30-Minute Drive)	Typical Education & Training
43-4051	Customer Service Representatives	843	1,636	4,134	1.2	HS, Short-Term
53-7065	Stockers and Order Fillers	1,062	1,561	3,389	1.2	HS, Short-Term
11-1021	General and Operations Managers	784	1,435	3,370	0.9	B, 5 yrs+
37-2011	Janitors and Cleaners	889	1,392	3,062	1.1	Short-Term
43-6014	Administrative Assistants	590	1,091	2,533	1.0	HS, Short-Term
43-1011	Supervisors of Office and Administrative Support Workers	397	816	2,094	1.2	HS, < 5 yrs
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	388	782	1,983	0.6	Short-Term
49-9071	Maintenance and Repair Workers	558	924	2,003	1.0	HS, Moderate-Term
53-3032	Heavy and Tractor-Trailer Truck Drivers	421	710	1,742	0.7	C, Short-Term
13-1199	Business Operations Specialists	340	669	1,570	0.9	B
41-4012	Sales Representatives, Wholesale	247	468	1,239	0.8	HS, Moderate-Term
15-1252	Software Developers	311	566	1,309	0.5	B
53-3033	Light Truck Drivers	214	373	959	0.8	HS, Short-Term
13-1111	Management Analysts	231	457	1,126	0.9	B, < 5 yrs
53-3031	Driver/Sales Workers	241	337	786	1.4	HS, Short-Term
43-5071	Shipping, Receiving, and Inventory Clerks	156	266	678	0.7	HS, Short-Term
13-1161	Market Research Analysts and Marketing Specialists	147	275	710	0.7	B
53-1047	Supervisors of Transportation and Material Moving Workers	170	286	661	0.9	HS, < 5 yrs
53-7064	Packers and Packagers, Hand	130	183	447	0.7	Short-Term
53-7051	Industrial Truck Operators	85	162	422	0.5	Short-Term
51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	64	144	367	0.5	HS, Moderate-Term
49-3031	Bus and Truck Mechanics and Diesel Engine Specialists	70	121	273	0.8	HS, Long-Term
43-5061	Production, Planning, and Expediting Clerks	58	136	331	0.6	HS, Moderate-Term
43-5032	Dispatcher	47	86	212	0.8	HS, Moderate-Term
43-4151	Order Clerks	42	67	159	1.0	Some College, Short-Term
13-1081	Logisticians	32	116	243	0.6	B
11-3071	Transportation, Storage, and Distribution Managers	27	58	146	0.7	HS, 5 yrs+
53-7063	Machine Feeders and Offbearers	15	22	47	0.7	Short-Term
43-5111	Weighers, Measurers, Checkers, and Samplers, Recordkeeping	12	17	44	0.7	HS, Short-Term
43-5011	Cargo and Freight Agents	14	34	71	0.4	HS, Short-Term

Source: JobsEQ, 2021 Average, Garner Economics. Employment — Work in County represents those employed by companies located in Santa Rosa County regardless of where workers reside. Employment — Live in County represents those who reside in Santa Rosa County regardless of where they work. Employment-Live Within 30 Minute Drive of Santa Rosa County.

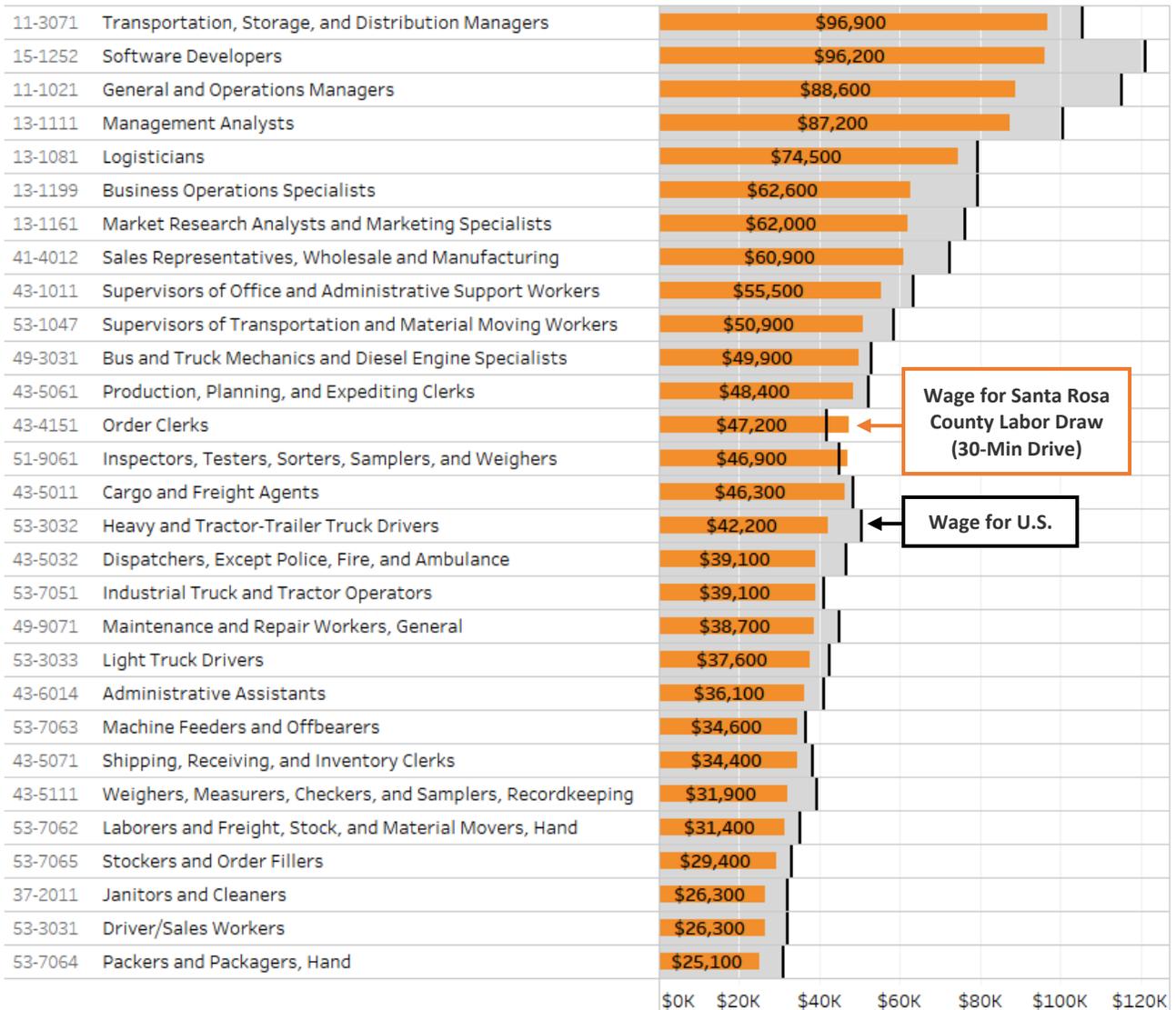
Typical Education & Training shows the typical education, on-the-job training, and experience needed to work in a given occupation.

Legend: HS-High School, B-Bachelor Degree, C-Certification, Some College-College courses no degree.

Wages

Figure 3.3 exhibits the average annual wages per worker for the top occupations for the Distribution target compared to wages for each occupation nationally. All but two positions in this occupation mix are below national levels and can be marketed as cost savings for companies.

Figure 3.3: Distribution Target Wages, 2021
Santa Rosa County 30-Minute Drive-Time, United States



Source: JobsEQ, 2021 Average Annual Salary, Garner Economics

Transferable Skills

Wealth-building is at the base of economic development efforts — to bring quality jobs and investment to a community. Most occupations have numerous related jobs that may have transferable skills. Occupation relationships use data from O*NET to compare occupations based on knowledge, skill, and ability levels. For the top five occupations ranked by annual average pay rates listed in Figure 3.3, five transferable occupations with a lower annual pay rate and highly relatable skills are listed to show the possibility of upward mobility for workers (Table 3.3). *Software Developers* and *Business Operation Specialists* did not have matching transferrable occupations in the area and are not included.

Table 3.3: Distribution Target High-Paying Occupations and Skills-Transferable Occupations

High-Wage Occupations	Average Wage	Transferable Occupation	2022 Employment	Average Wage
Transportation, Storage, and Distribution Managers	\$96,000	Supervisors of Transportation and Material Moving Workers	648	\$50,900
		Dispatchers, Except Police, Fire, and Ambulance	201	\$39,100
		Farmers, Ranchers, and Other Agricultural Managers	477	\$82,900
		Supervisors of Construction Trades and Extraction Workers	1,154	\$59,800
		Supervisors of Mechanics, Installers, and Repairers	719	\$64,900
General and Operations Managers	\$88,600	Architects, Except Landscape and Naval	125	\$77,700
		Supervisors of Mechanics, Installers, and Repairers	719	\$64,900
		Logisticians	141	\$74,500
		Farmers, Ranchers, and Other Agricultural Managers	477	\$82,900
		Purchasing Agents, Except Wholesale, Retail, and Farm Products	287	\$62,300
Management Analysts	\$87,200	Social and Community Service Managers	196	\$65,000
		Personal Financial Advisors	447	\$84,400
		Supervisors of Police and Detectives	180	\$79,900
		Occupational Health and Safety Specialists	87	\$71,300
		Supervisors of Non-Retail Sales Workers	601	\$79,500
Logisticians	\$74,500	Supervisors of Mechanics, Installers, and Repairers	719	\$64,900
		Supervisors of Firefighting and Prevention Workers	138	\$62,600
		Dispatchers, Except Police, Fire, and Ambulance	201	\$39,100
		Supervisors of Transportation and Material Moving Workers	648	\$50,900
		Telecommunications Equipment Installers and Repairers	265	\$52,600
Market Research Analysts and Marketing Specialists	\$62,000	Public Relations Specialists	287	\$56,000
		Advertising Sales Agents	74	\$51,400
		Fundraisers	94	\$51,900
		Compensation, Benefits, and Job Analysis Specialists	95	\$57,500
		Meeting, Convention, and Event Planners	134	\$42,500

Source: JobsEQ, 2022 average (employment), 2021 (wages). Job transferability based on O*Net crosswalk and JobsEQ training rank, Garner Economics

Education and Training

There is an existing regional pool of workers engaged in *Material Moving* occupations including loading, shipping, receiving, logisticians, and distribution managers. Truck Driver Institute (TDI) has an established truck driving school located in Milton, which can help position the County for addressing the system-wide driver shortage. In 2022, the 30-minute drive time area had more than 2,800 light and heavy truck drivers.

Overall, colleges and universities in a 45-minute drive-time area granted 1,692 certificates and degrees in areas related to target careers in 2021. These educational institutions in the area grant degrees that support occupation skill building for the diverse occupations needed in today’s distribution sector.

Table 3.4: Regional Degree Completions in Majors Related to Distribution, 2021

Degrees by Area of Study	Certificate	Associate	Bachelor	Graduate	Number of Degrees 2021
Business, Management & Marketing	167	108	525	212	1,012
Computer & Information Sciences	63	125	164	23	375
Mechanic & Repair Technologies	211	22			233
Mathematics & Statistics			14	35	49
Transportation & Materials Moving	23				23
Grand Total	464	255	703	270	1,692

Source: National Center for Education Statistics, Garner Economics

Graduates from Embry Riddle Pensacola campus, Coastal Alabama Community College Brewton Campus, or FSU Pensacola Regional Medical School Campus are not captured in this table. Table reflects reported degrees/certificates granted at the University of West Florida, Pensacola State College, Northwest Florida State College, Fortis Institute, George Stone Technical College, Locklin Technical College, and Florida Institute of Ultrasound.



All Things Aviation



Santa Rosa County has long pursued the aviation sector as a targeted business. Proximity to multiple military aviation installations, aircraft assembly operations, and existing aerospace companies, Santa Rosa County adds to the strong aviation market in Northwest Florida. The Airbus final assembly operation in Mobile – only 70 miles from Santa Rosa County – is particularly notable. Additional OEM aircraft manufacturing facilities in a reasonable distance include Embraer in Jacksonville and Melbourne, Gulfstream in Savannah, and Boeing in Charleston.

In the 2018 *Building a Better Santa Rosa County* strategy, a key recommendation was to invest in aviation product – such as supporting the Whiting Aviation Park being discussed by the Santa Rosa County Commission. This 239-acre commercial and industrial park with 6,000-foot runway access is a shining jewel in the recruitment of aviation businesses.

Whiting Aviation Park is adjacent to Naval Air Station Whiting Field, where all helicopter pilots for the Navy, Marine Corps and Coast Guard are trained. Leonardo recently announced the opening of its support center in the park planning to construct a 100,000-square-foot facility, creating 40 to 50 new jobs. The company was awarded a contract to replace the Navy’s fleet of helicopters at NAS Whiting Field with a newer model.

Garner Economics coined the phrase **Talent is the New Currency®** and by this measure, Santa Rosa County is rich with its strong aviation talent pipeline. And it continues to grow.

The Triumph Gulf Coast Board granted \$7 million to Northwest Florida State College to fund the Aviation Center of Excellence (ACE) in neighboring Okaloosa County. The ACE project will train students in FAA and industry-recognized certifications including airframe and powerplant mechanics (A&P) and professional pilot certificates. This can add to the 711 active A&P certified mechanics registered in Santa Rosa County.

Target rationales include:

- Whiting Aviation Park (P)
- Existence of major military aviation installations in the area (P)
- Strong Northwest Florida and Pensacola Metro profile of existing aviation firms (P)
- Proximity to large aircraft assembly operations of global brands (P)
- High number of military veterans in area with aviation & technical skills (P) (C)
- High concentrations of employment in several aviation fields (P)
- Availability of skilled workers in aviation (P)
- 711 Active FAA Certified A&P mechanics in Santa Rosa County (P)
- George Stone Technical Center offers A&P FAA certified training (P)
- Embry Riddle – NAS Pensacola (P) (C)
- Aviation Academy Milton High School (P) (C)
- More than 2,422 degrees and certificates granted for in majors related to aviation, aviation mfg. & support services (P)(C)
- Within ½ hour of major university/ college (P)(C)
- Nearby engineering program (P)(C)
- Post-secondary vocational training (P)
- Relatively low cost of labor (P)
- Proximity to Pensacola Int’l Airport (P) (C)

Legend: Items appealing to needs of prospects (P) or community (C).

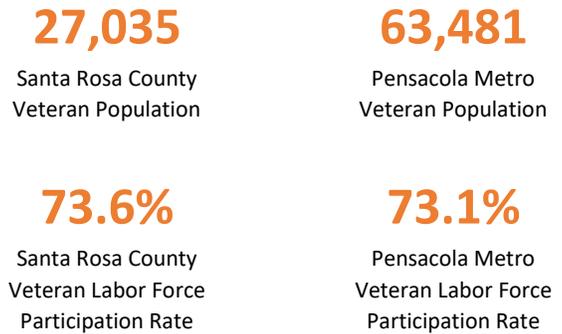
Veteran Population

The military installations in the area and the veteran population offer an exceptional pipeline for the aviation sector. Installations include the Naval Air Station Whiting Airfield in Santa Rosa County, as well as Naval Air Station Pensacola and Eglin Air Force Base within the region. These operations in addition to more in the greater region with retiring service men and women each year along with a robust veteran population of more than 63,000 in the metro area. Santa Rosa County is home to 27,000 veterans (Figure 3.4).

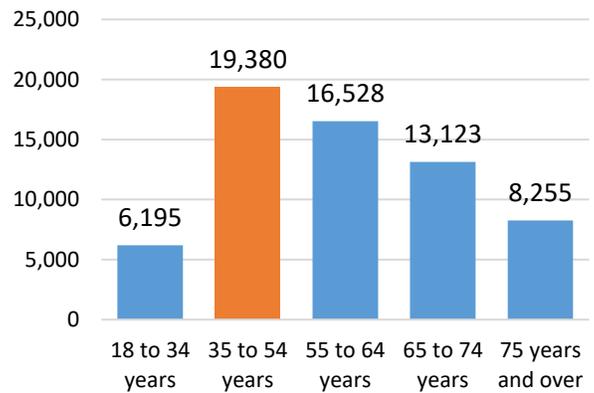
The Labor Force Participation Rate of veterans is higher than the rate of the entire population for both Santa Rosa County and the Pensacola Metro. The 2021 Participation Rates are 73.6% and 73.1% respectively compared to 69.3% and 72.7%. The largest age group of veterans residing in the Pensacola Metro is 35 to 54 years – prime working age. The number of military and veterans in the area with marketable skills is outstanding.

Aviation subsectors in this target family include the manufacturing of aircraft engines and parts, navigation and electrical equipment, aviation parts distribution, air transportation, flight training, and support activities. Aircraft Maintenance, Repair & Overhaul (MRO) operations are included in support activities. Santa Rosa County realized a 34.6% growth in GDP in this sector over the past decade. Job growth in the 30-minute drive time around Santa Rosa County was 18.2% for this same time frame and the 10-year job forecast is a 23.7% increase.

Figure 3.4 Veteran Statistics, 2021



Veteran Population by Age Group, 2021



Source: US Census Bureau, Garner Economics

Target rationales continued:

- Availability of sites (P)
- Availability of local incentives (P)
- Relatively low cost of living (P)(C)
- Quality of education K-20+ (P) (C)
- Historical national 10-year job growth of 7.4% and GDP growth of 27.5% (P)(C)
- National job growth forecast 7.4% for next decade (P)(C)
- Santa Rosa County labor shed 10-year job growth of 18.2% and 10-year forecast of 23.7% (P) (C)
- Santa Rosa County 10-year GDP growth of 34.6% (P)(C)
- An existing pool of high-demand occupations and occupations with skills transferability (P)

Legend: Items appealing to needs of prospects (P) or community (C)

Table 3.5 All Things Aviation Job & GDP Trend & Outlook, 2022

		United States			Santa Rosa County 30-Minute Drive Time			
NAICS	Industry	10-Year % GDP Change	10-Year Employment Change %	10-Year Employment Forecast %	10-year % GDP Change*	10-Year Employment Change %	10-Year Employment Forecast %	LQ
4812	Nonscheduled Air Transportation	-11.6%	24.4%	9.6%	-99.5%	-53.5%	11.1%	0.3
3345	Navigational, Measuring, Electromedical, and Control Instruments Mfg.	34.5%	3.0%	1.7%	186.9%	12.2%	9.6%	0.2
336412	Aircraft Engine and Engine Parts Mfg.	8.5%	-1.7%	-0.4%	n/a	n/a	5.4%	0.05
336413	Other Aircraft Parts and Auxiliary Equipment Mfg.	4.0%	-7.4%	-0.4%	n/a	46.7%	5.2%	0.03
423860	Transportation Equipment and Supplies Wholesalers	32.7%	-0.4%	3.6%	n/a	-68.2%	9.2%	0.6
4881	Support Activities for Air Transportation	44.7%	24.2%	20.8%	56.5%	34.2%	29.6%	2.3
611512	Flight Training	40.8%	31.2%	7.1%	-28.9%	163.9%	15.0%	3.9
8112	Electronic and Precision Equipment Repair and Maintenance	33.7%	3.3%	8.6%	-57.2%	-24.1%	14.4%	1.0
Total Target		27.5%	7.4%	7.4%	34.6%	18.2%	23.7%	0.9

* GDP figures are for Santa Rosa County only. Source: JobsEQ, Garner Economics

Occupations

The top occupations for the All Things Aviation target are a mix of jobs covering aviation-specialized functions such as *Avionics Technicians* but also include production occupations that can be utilized in aircraft part manufacturing. The list of in-demand occupations for the target in Table 3.6 is gathered from staffing patterns of subsectors in the target industry family. Employment levels are shown from three different viewpoints:

1. Those who work at companies located in Santa Rosa County, regardless of where workers reside.
2. Workers who live in Santa Rosa County within that occupation category, regardless of where they work.
3. People who live within a 30-minute drive from Santa Rosa County for each occupation. This figure is recommended to market the talent potential.

Location Quotients (LQ) are also included to illustrate concentration relative to the nation. An LQ figure shows the concentration of an industry or occupation in an area relative to the national level of concentration and is a good indicator of strength. An LQ of 1.2 or more is favorable showing a local specialization. *Aircraft Service Attendants* have a 2 LQ for the 30-minute drivetime labor draw, while *Avionics Technicians* have a 1.4 LQ, and *Aircraft Mechanics and Service Technicians* have a 1.2 LQ for the same region.

Education and training levels needed for entry into target occupations vary from no education needed and short-term on-the-job training to requiring a certificate, five years of experience, or moderate-term on-the-job training. Occupations in Table 3.6 show a variety of typical requirements showing the need for higher education and technical training.

Table 3.6 All Things Aviation Target Top Occupations, 2022
Sorted by Employment-Live within 30-Minute Drive

SOC	Occupation	Employment (Work in County)	Employment (Live in County)	Employment (Live 30-Minute Drive)	LQ (30-Minute Drive)	Typical Education & Training
11-1021	General and Operations Managers	784	1,435	3,370	0.9	B, 5 yrs+
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	388	782	1,983	0.6	Short-Term
49-9071	Maintenance and Repair Workers	558	924	2,003	1.0	HS, Moderate-Term
41-4012	Sales Representatives, Wholesale and Manufacturing,	247	468	1,239	0.8	HS, Moderate-Term
15-1252	Software Developers	311	566	1,309	0.5	B
13-1082	Project Management Specialists	247	430	1,007	0.9	B
43-5071	Shipping, Receiving, and Inventory Clerks	156	266	678	0.7	HS, Short-Term
49-1011	Supervisors of Mechanics, Installers, and Repairers	181	325	753	1.1	HS, < 5 yrs
51-2092	Team Assemblers	111	227	596	0.4	
53-7061	Cleaners of Vehicles and Equipment	117	184	480	1.2	Short-Term
51-1011	Supervisors of Production and Operating Workers	105	192	496	0.7	HS, < 5 yrs
15-1211	Computer Systems Analysts	81	176	475	0.7	B,
51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	64	144	367	0.5	HS, Moderate-Term
13-1023	Purchasing Agents	65	141	349	0.7	
43-5061	Production, Planning, and Expediting Clerks	58	136	331	0.6	HS, Moderate-Term
49-3011	Aircraft Mechanics and Service Technicians	84	171	335	1.2	C,
17-2112	Industrial Engineers	27	65	196	0.5	B
51-4041	Machinists	21	63	175	0.4	HS, Long-Term
17-2141	Mechanical Engineers	25	59	168	0.4	B
51-2028	Electrical and Electromechanical Equipment Assemblers	40	61	129	0.4	HS, Moderate-Term
17-2071	Electrical Engineers	25	48	140	0.5	B
17-3023	Electrical Engineering Technicians	22	67	136	0.8	A
51-9161	Computer Numerically Controlled Tool Operators	10	33	93	0.4	HS, Moderate-Term
17-2072	Electronics Engineers	23	34	87	0.6	B
53-2012	Commercial Pilots	20	29	64	1.1	C, Moderate-Term
43-5011	Cargo and Freight Agents	14	34	71	0.4	HS, Short-Term
17-2011	Aerospace Engineers	8	22	54	0.5	B
49-2091	Avionics Technicians	14	30	59	1.4	A
53-6032	Aircraft Service Attendants	15	20	39	2.0	HS, Short-Term
51-2011	Aircraft Structure, Surfaces, Rigging, and Systems Assemblers	2	9	33	0.4	HS, Moderate-Term

Source: JobsEQ, 2021 Average. Employment — Work in County represents those employed by companies located in Santa Rosa County regardless of where workers reside. Employment — Live in County represents those who reside in Santa Rosa County regardless of where they work. Employment-Live Within 30 Minute Drive of Santa Rosa County.

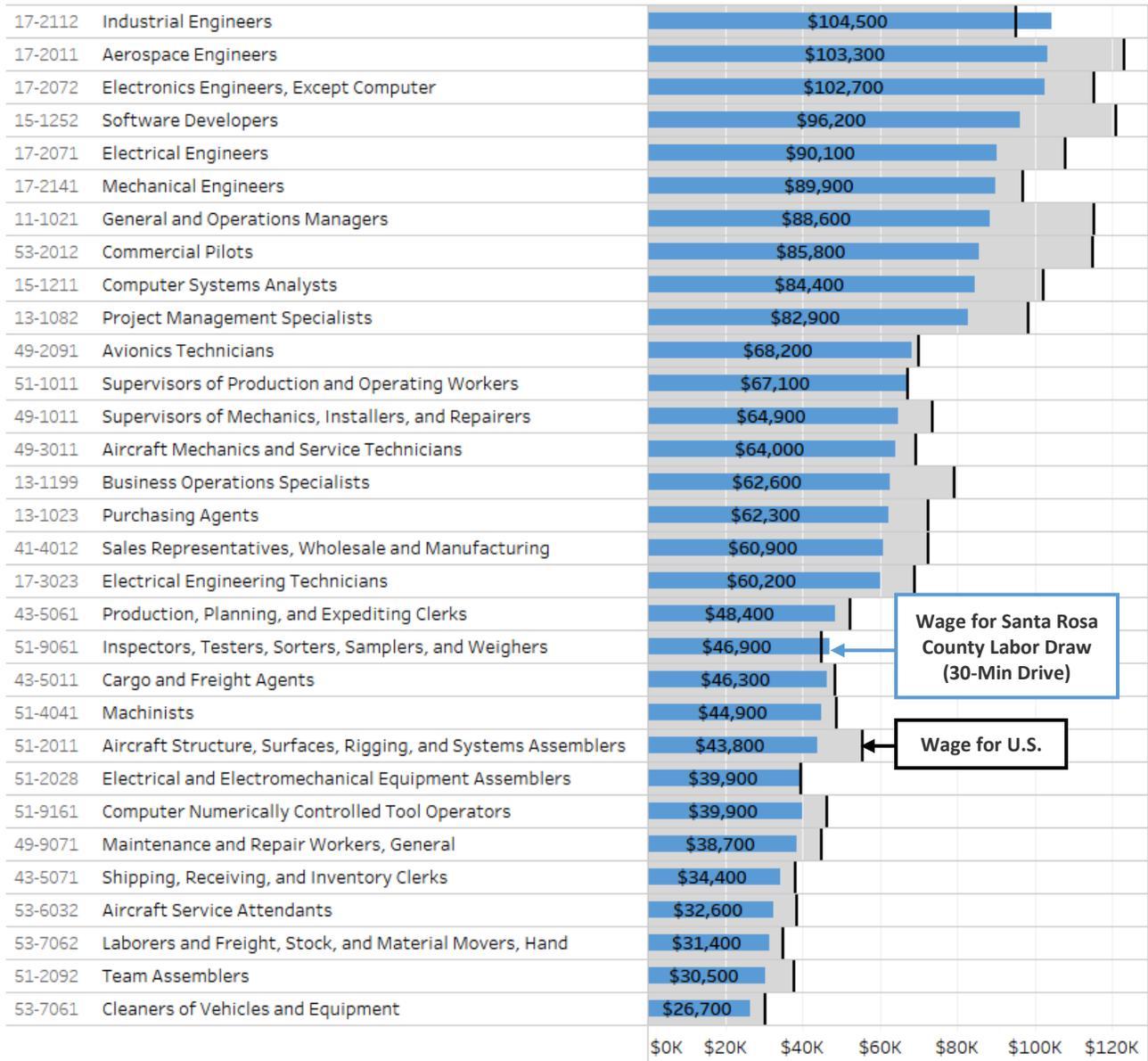
Typical Education & Training shows the typical education, on-the-job training, and experience needed to work in a given occupation.

Legend: HS-High School, B-Bachelor Degree, C-Certification, Some College-College courses no degree.

Wages

Figure 3.5 exhibits the average annual wages per worker for the top occupations for the All Things Aviation target compared to wages for each occupation nationally. All but three positions in this occupation mix are below national levels and can be marketed as cost savings for companies.

**Figure 3.5: All Things Aviation Target Wages, 2021
Santa Rosa County 30-Minute Drive-Time, United States**



Source: JobsEQ, 2021 Average Annual Salary, Garner Economics

Transferable Skills

The aviation sector is strong in Santa Rosa County and the talent pipeline is robust. That said, there is a tight labor market, particularly for some technical positions. Many occupations have related jobs that may have transferable skills to help a person move fields or advance in their careers. From the top occupations listed in Table 3.6, the highest-paying occupations were analyzed for occupations with transferable skills and lower annual pay rates. Relationships between occupations are established based on knowledge, skill, and ability levels. O*NET, a national source for occupational information, provides comparisons between positions. Table 3.7 shows the top positions and five related positions with transferable skills. *Software Developers* did not have matching transferrable occupations in the area and this position is not included.

Table 3.7: All Things Aviation Target High-Paying Occupations and Skills-Transferable Occupations

High-Wage Occupations	Average Wage	Transferable Occupation	2022 Employment	Average Wage
Industrial Engineer	\$104,500	Architects, Except Landscape and Naval	125	\$77,700
		Construction Managers	673	\$89,300
		Supervisors of Mechanics, Installers, and Repairers	719	\$64,900
		Construction and Building Inspectors	171	\$53,500
		Civil Engineers	309	\$91,500
Aerospace Engineers	\$103,300	Mechanical Engineers	145	\$89,900
		Engineers, All Other	133	\$83,900
		Electronics Engineers, Except Computer	76	\$102,700
		Civil Engineers	309	\$91,500
		Electrical Engineers	125	\$90,100
Electronics Engineers, Except Computer	\$102,700	Avionics Technicians	33	\$68,200
		Electrical and Electronic Engineering Technicians	93	\$60,200
		Engineers, All Other	133	\$83,900
		Computer Science Teachers, Postsecondary	160	\$53,700
		Electrical Engineers	125	\$90,100
Electrical Engineers	\$90,100	Engineers, All Other	133	\$83,900
		Computer Science Teachers, Postsecondary	160	\$53,700
		Civil Engineering Technologists and Technicians	66	\$48,800
		Architectural and Civil Drafters	119	\$50,600
		Aerospace Engineering and Operations Technicians	22	\$76,400
Mechanical Engineers	\$89,900	Environmental Engineers	35	\$86,900
		Mechanical Drafters	42	\$54,400
		Engineers, All Other	133	\$83,900
		Civil Engineering Technicians	66	\$48,800
		Industrial Engineering Technicians	30	\$45,800

Source: JobsEQ, 2022 average (employment), 2021 (wages). Job transferability based on O*Net crosswalk and JobsEQ training rank, Garner Economics

Education and Training

Overall, colleges and universities in a 45-minute drive-time area granted 2,422 certificates and degrees in areas related to target careers in 2021. Important to the aviation sector, George Stone Technical Center in Pensacola offers A&P training—FAA-approved courses in Airframe and Powerplant Mechanics. As mentioned earlier in this profile, Northwest Florida State College recently gained funds for its Aviation Center of Excellence in Okaloosa County which will offer A&P training as well as commercial pilot certification. Peter Prince Aviation Center is home to Trident Flight School offering private and commercial licenses and instrument rating. AMS, also located at Peter Price Aviation Center provides a variety of flight training courses.

Embry Riddle, the largest and oldest aviation-focused university in the world, has a campus on Naval Air Station Pensacola which is open to military, veterans, service member families, and civilians employed at the installation. Aviation training begins as early as high school in Santa Rosa County with Milton High School offering courses via the Aviation Academy.

Table 3.8: Regional Degree Completions in Majors Related to Aviation, 2021

Degrees by Area of Study	Certificate	Associate	Bachelor	Graduate	Number of Degrees 2021
Business, Management & Marketing	167	108	525	212	1,012
Engineering Technologies & Related	249	100	34		383
Computer & Information Sciences	63	125	164	23	375
Precision Production	239				239
Mechanic & Repair Technologies	211	22			233
Engineering			108		108
Mathematics & Statistics			14	35	49
Transportation & Materials Moving	23				23
Grand Total	952	355	845	270	2,422

Source: National Center for Education Statistics, Garner Economics

Graduates from Embry Riddle Pensacola campus, Coastal Alabama Community College Brewton Campus, or FSU Pensacola Regional Medical School Campus are not captured in this table. Table reflects reported degrees/certificates granted at the University of West Florida, Pensacola State College, Northwest Florida State College, Fortis Institute, George Stone Technical College, Locklin Technical College, and Florida Institute of Ultrasound.



Industry 4.0 is the next industrial revolution and has everything to do with digitization and connection. A veritable catalog of buzzwords characterizes this transformation—the Internet of Things (IoT), big data, robots, AI, and more. At the core of this is the adoption of computers and automation and the connection to smart and autonomous systems that can ultimately be run without human interaction. While this may not be a reality today, smart components and the analysis of data are helping to optimize operations and problem-solve irregularities or costly mistakes.

The *Manufacturing* sector in Santa Rosa County experienced growth between 2017 and 2022 adding 420 jobs, an increase of 44.6%. The County has excellent interstate access, rail service, technical training, and a workforce with applicable skills. The Industry 4.0 target family focuses on subsectors of manufacturing and engineering support to leverage the County’s existing assets and service levels of utilities. These businesses include metalwork, machine shops, electrical equipment, recreational boat building, and manufacturing engineering services.

Overall, the projected job growth of this target is 7% within the labor draw area, a 30-minute drive from Santa Rosa County. Existing metalworking firms like Gulf Cable are prime examples of the types of companies this target aims to attract, retain, and expand. The company makes aluminum and copper insulated cables for utility projects and employs 300. In 2021 the company announced its expansion into a new 160,000-square-foot facility.

Santa Rosa County has been the home of manufacturing operations, however, the momentum in establishing industrial parks that offer certified ready sites will spur the growth of the Industry 4.0 target.

Target rationales include:

- Positioned to serve regional market (P)
- Excellent interstate access (P)
- Rail service via CSX (P)
- Proximity to Pensacola & Mobile Ports (P)
- High number of military veterans in area with technical skills (P) (C)
- *Manufacturing* industry sector grew by 44.6% in past 5 years (P)
- *Production* occupations grew by 23% in past 5 years (P)
- An existing pool of high-demand occupations and occupations with skills transferability (P)
- More than 2,400 degrees and certificates granted for in majors related to manufacturing & support services (P)(C)
- Within ½ hour of major university/ college (P)(C)
- Post-secondary vocational training (P)
- Nearby engineering program (P)(C)
- Relatively low cost of labor (P)
- Proximity to Pensacola Int’l Airport (P) (C)
- Availability of sites (P)
- Availability of local incentives (P)
- Relatively low cost of living (P)(C)
- Quality of education K-20+ (P) (C)

Legend: Items appealing to needs of prospects (P) or community (C).

Target rationales continued:

- Historical national 10-year job growth of 9.3% (P)(C)
- Historical national 10-year GDP growth of 28.9% (P)(C)
- U.S. job growth forecast 1.8% for next decade (P)(C)
- Santa Rosa County labor shed 10-year job forecast growth of 7.1% (P) (C)

Legend: Items appealing to needs of prospects (P) or community (C).

Table 3.9 Industry 4.0 Job & GDP Trend & Outlook, 2021

		United States			Santa Rosa County 30-Minute Drive Time			
NAICS	Industry	10-Year % GDP Change	10-Year Employment Change %	10-Year Employment Forecast %	10-year % GDP Change*	10-Year Employment Change %	10-Year Employment Forecast %	LQ
3322	Cutlery and Handtool Mfg.	4.9%	-7.5%	2.5%	n/a	-52.2%	15.6%	0.2
3325	Hardware Mfg.	20.2%	2.8%	2.6%	n/a	6.3%	3.4%	0.0
3326	Spring and Wire Product Mfg.	17.1%	-3.3%	2.6%	n/a	26.4%	15.9%	0.3
3327	Machine Shops; Turned Product; and Screw, Nut, and Bolt Mfg.	12.4%	-5.6%	2.9%	78.1%	-31.5%	11.7%	0.3
3329	Other Fabricated Metal Product Mfg.	26.7%	3.0%	2.6%	108.0%	81.9%	9.0%	0.3
3353	Electrical Equipment Mfg.	23.8%	-1.8%	9.6%	n/a	136.0%	15.1%	0.2
332114	Custom Roll Forming	47.1%	17.7%	2.6%	n/a	11.1%	3.4%	0.01
332119	Metal Crown, Closure, and Other Metal Stamping	9.9%	-5.0%	2.6%	n/a	-98.1%	3.5%	0.01
332323	Ornamental and Architectural Metal Work Mfg.	65.1%	26.9%	5.1%	n/a	55.3%	9.2%	0.8
336612	Boat Building	72.3%	66.8%	-11.8%	34.3%	75.1%	-5.2%	1.7
541330	Engineering Services	34.7%	18.0%	0.8%	-37.7%	-12.8%	7.0%	0.8
Total Target		28.9%	9.3%	1.8%	n/a	-7.3%	7.1%	0.6

** GDP figures are for Santa Rosa County only. Source: JobsEQ, Garner Economics*

Occupations

Production occupations grew by 23% over the past 5 years gaining 237 jobs. The top occupations for the Industry 4.0 target are a mix of jobs from a variety of fields and are derived from studying staffing patterns in the target industry family. These occupations are listed with employment levels from several different aspects:

1. Those who work at companies located in Santa Rosa County, regardless of where workers reside.
2. Workers who live in Santa Rosa County within that occupation category, regardless of where they work.
3. People who live within a 30-minute drive from Santa Rosa County for each occupation. This figure is recommended to market the talent potential.

Location Quotients (LQ) show the concentration of an industry or occupation in an area relative to the national level of concentration and is a good indicator of strength. An LQ of 1.2 or more is favorable showing a local specialization. Education and training levels needed for entry into target occupations vary from no education needed and short-term on-the-job training to requiring a certificate, five years of experience, or moderate-term on-the-job training. Occupations in Table 3.10 show a variety of typical requirements showing the need for higher education and technical training.

Table 3.10 Industry 4.0 Target Top Occupations, 2021
Sorted by Employment-Live within 30-Minute Drive

SOC	Occupation	Employment (Work in County)	Employment (Live in County)	Employment (Live 30-Minute Drive)	LQ (30-Minute Drive)	Typical Education & Training
11-1021	General and Operations Managers	784	1,435	3,370	0.9	B, 5 yrs+
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	388	782	1,983	0.6	Short-Term
49-9071	Maintenance and Repair Workers	558	924	2,003	1.0	HS, Moderate-Term
13-1199	Business Operations Specialists	340	669	1,570	0.9	B
41-4012	Sales Representatives, Mfg.	247	468	1,239	0.8	HS, Moderate-Term
15-1252	Software Developers	311	566	1,309	0.5	B
13-1082	Project Management Specialists	247	430	1,007	0.9	B
13-1071	Human Resources Specialists	164	344	905	0.9	B
43-5071	Shipping, Receiving, and Inventory Clerks	156	266	678	0.7	HS, Short-Term
51-1011	Supervisors of Production and Operating Workers	105	192	496	0.7	HS, < 5 yrs
15-1211	Computer Systems Analysts	81	176	475	0.7	B
51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	64	144	367	0.5	HS, Moderate-Term
49-9041	Industrial Machinery Mechanics	48	120	316	0.7	HS, Long-Term
51-4121	Welders, Cutters, Solderers, and Brazers	63	112	277	0.6	HS, Moderate-Term
13-1023	Purchasing Agents	65	141	349	0.7	
43-5061	Production, Planning, and Expediting Clerks	58	136	331	0.6	HS, Moderate-Term
17-2112	Industrial Engineers	27	65	196	0.5	B
51-9198	Helpers--Production Workers	26	55	140	0.6	HS, Short-Term
11-3051	Industrial Production Managers	25	40	122	0.6	B, 5 yrs+
51-2028	Electrical and Electromechanical Equipment Assemblers	40	61	129	0.4	HS, Moderate-Term
17-2071	Electrical Engineers	25	48	140	0.5	B
11-9041	Engineering Managers	22	49	129	0.5	B, 5 yrs+
17-3023	Electrical Engineering Technicians	22	67	136	0.8	A,
51-9161	Computer Numerically Controlled Tool Operators	10	33	93	0.4	HS, Moderate-Term
51-4081	Multiple Machine Tool Operators, Metal	7	17	43	0.3	HS, Moderate-Term
51-4031	Cutting, Punching, and Press Machine Operators, Metal	6	15	42	0.2	HS, Moderate-Term
17-3013	Mechanical Drafters	8	30	63	0.7	A,
17-2081	Environmental Engineers	9	13	31	0.7	B
51-4033	Grinding, Lapping, Polishing, and Buffing Machine Operators, Metal	3	8	20	0.3	HS, Moderate-Term
51-4111	Tool and Die Makers	2	5	14	0.2	C, Long-Term

Source: JobsEQ, 2021 Average. Employment — Work in County represents those employed by companies located in Santa Rosa County regardless of where workers reside. Employment — Live in County represents those who reside in Santa Rosa County regardless of where they work. Employment-Live Within 30 Minute Drive of Santa Rosa County.

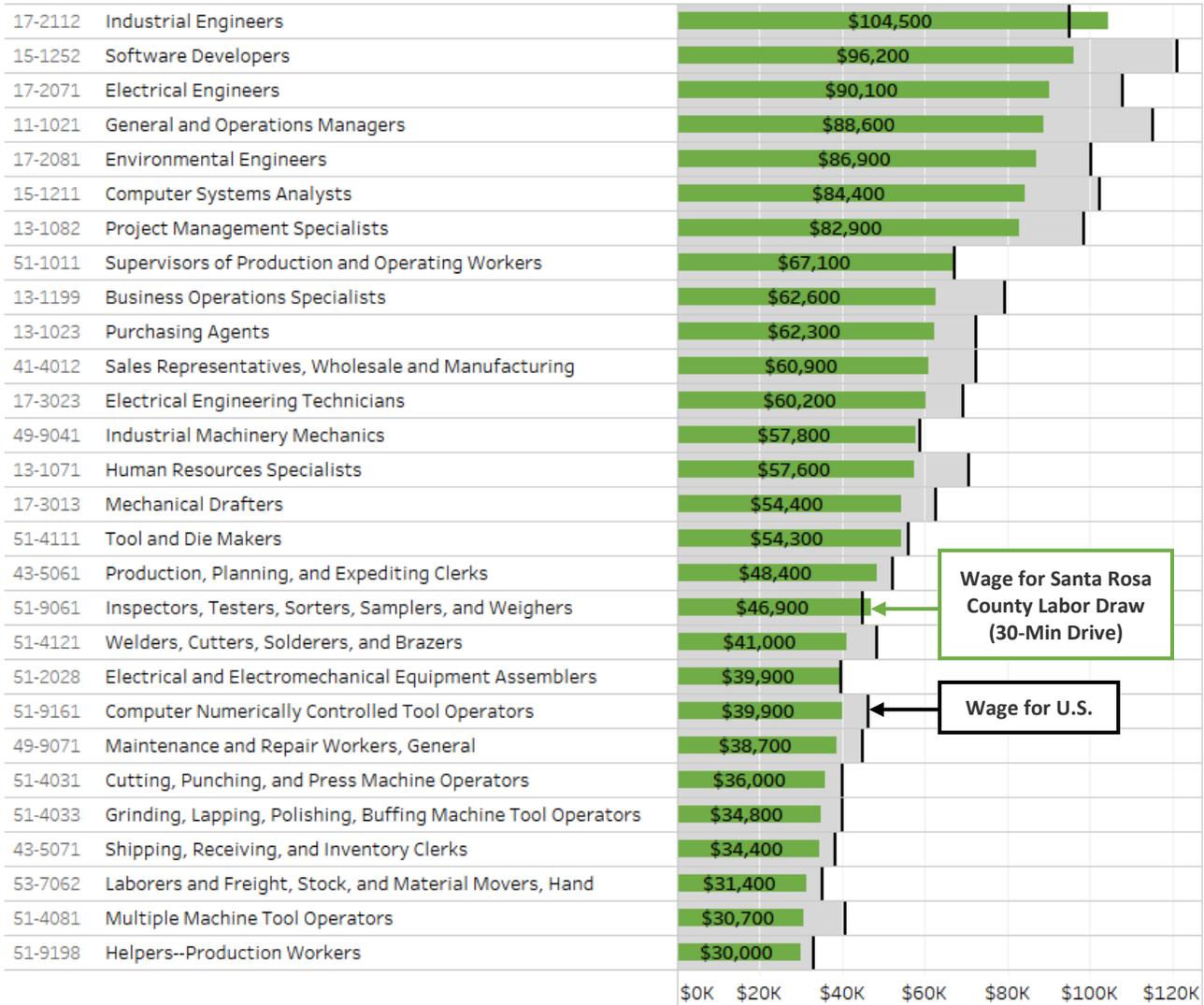
Typical Education & Training shows the typical education, on-the-job training, and experience needed to work in a given occupation.

Legend: HS-High School, B-Bachelor Degree, C-Certification, Some College-College courses no degree.

Wages

Figure 3.6 exhibits the average annual wages per worker for the top occupations for the Industry 4.0 target compared to wages for each occupation nationally. All but three positions in this occupation mix are below national levels and can be marketed as cost savings for companies.

Figure 3.6: Industry 4.0 Target Wages, 2021
Santa Rosa County 30-Minute Drive-Time, United States



Source: JobsEQ, 2021 Average Annual Salary, Garner Economics

Transferable Skills

Manufacturing is changing and becoming more advanced utilizing a variety of technical skills. Many occupations have related jobs that may have transferable skills to aid in the advancement of careers or change fields with a more positive outlook. From the top occupations listed in Table 3.10, the highest-paying occupations were analyzed for occupations with transferable skills and lower annual pay rates.

Relationships between occupations are established based on knowledge, skill, and ability levels. O*NET, a national source for occupational information, provides comparisons between positions. Table 3.11 shows the top positions and five related positions with transferable skills. *Software Developers* did not have matching transferrable occupations in the area and this position is not included.

Table 3.11: Industry 4.0 Target High-Paying Occupations and Skills-Transferable Occupations

High-Wage Occupations	Average Wage	Transferable Occupation	2022 Employment	Average Wage
Industrial Engineer	\$104,500	Architects, Except Landscape and Naval	125	\$77,700
		Construction Managers	673	\$89,300
		Supervisors of Mechanics, Installers, and Repairers	719	\$64,900
		Construction and Building Inspectors	171	\$53,500
		Civil Engineers	309	\$91,500
Electrical Engineers	\$90,100	Engineers, All Other	133	\$83,900
		Computer Science Teachers, Postsecondary	160	\$53,700
		Civil Engineering Technologists and Technicians	66	\$48,800
		Architectural and Civil Drafters	119	\$50,600
		Aerospace Engineering and Operations Technicians	22	\$76,400
General and Operations Managers	\$88,600	Architects, Except Landscape and Naval	125	\$77,700
		Supervisors of Mechanics, Installers, and Repairers	719	\$64,900
		Logisticians	141	\$74,500
		Farmers, Ranchers, and Other Agricultural Managers	477	\$82,900
		Purchasing Agents, Except Wholesale, Retail, and Farm Products	287	\$62,300
Environmental Engineers	\$86,900	Environmental Science and Protection Technicians	51	\$40,200
		Architects, Except Landscape and Naval	125	\$77,700
		Farmers, Ranchers, and Other Agricultural Managers	477	\$82,900
		Engineers, All Other	133	\$83,900
		Occupational Health and Safety Specialists	87	\$71,300
Computer Systems Analysts	\$84,400	Network and Computer Systems Administrators	321	\$76,300
		Computer User Support Specialists	619	\$46,700
		Computer Science Teachers, Postsecondary	160	\$53,700
		Audio and Video Technicians	73	\$48,000
		Logisticians	141	\$74,500

Source: JobsEQ, 2022 average (employment), 2021 (wages). Job transferability based on O*Net crosswalk and JobsEQ training rank, Garner Economics

Education and Training

Overall, colleges and universities in a 45-minute drive-time area granted 2,422 certificates and degrees in areas related to Industry 4.0 occupations in 2021. A variety of degree and certificate training programs work to prepare the talent pipeline for manufacturing and engineering careers. Locklin Technical College and George Stone Technical College offer welding programs and other technical training.

Engineering programs are offered via the Hal Marcus College of Science and Engineering at the University of West Florida. This school also houses the Institute for Analytics and Industry Advancement working to prepare students for manufacturing environments with predictive analytics and modeling. Pensacola State College also offers Engineering at the Associate level.

Introductions to manufacturing are provided to students in Santa Rosa County K-12 schools as well. Several middle and high schools have an Advanced Manufacturing Academy and a Pre-Engineering Academy.

Table 3.12: Regional Degree Completions in Majors Related to Industry 4.0, 2021

Degrees by Area of Study	Certificate	Associate	Bachelor	Graduate	Number of Degrees 2021
Business, Management & Marketing	167	108	525	212	1,012
Engineering Technologies & Related	249	100	34		383
Computer & Information Sciences	63	125	164	23	375
Precision Production	239				239
Mechanic & Repair Technologies	211	22			233
Engineering			108		108
Mathematics & Statistics			14	35	49
Transportation & Materials Moving	23				23
Grand Total	952	355	845	270	2,422

Source: National Center for Education Statistics, Garner Economics

Graduates from Embry Riddle Pensacola campus, Coastal Alabama Community College Brewton Campus, or FSU Pensacola Regional Medical School Campus are not captured in this table. Table reflects reported degrees/certificates granted at the University of West Florida, Pensacola State College, Northwest Florida State College, Fortis Institute, George Stone Technical College, Locklin Technical College, and Florida Institute of Ultrasound.



Cybersecurity & Facility Tech

In today's world, information is shared digitally for many functions from health care to manufacturing processes. The need to protect information has grown immensely with the increased digital footprint of people, businesses, and governments operating in a modern, technical society. Many companies and institutions have incorporated cybersecurity as a standard part of operations.

Cybersecurity is the practice of protecting systems, networks, and programs from digital attacks. Cyberattacks are usually aimed at accessing, or destroying sensitive information; extorting money from users, or interrupting normal processes.

As industrial facilities and other operations become more computerized — and hackable — cybersecurity has become more relevant. Cyber threats at industrial facilities can disrupt production and affect timelines. Anything that tampers with control systems for mechanical or electrical devices, like lifts, assembly lines, or medical devices can be vulnerable.

Santa Rosa County has government-related cybersecurity and IT cluster and is developing its private sector. The military presence and talent are precisely the fuel this target family needs to grow. A handful of military and federal government operations in the area grow talent, provide the opportunity for contract work and grow the profile of the area as a cyber hub.

A complementary business sector to cybersecurity is Facility Tech. The management of facilities — those with smart systems, controlled access, and security needs — will integrate technology and maintenance. Military, data centers, health care, and government centers are some examples. Many of these businesses can benefit from veteran staff for security-consciousness personnel.

The limited supply of Class A and Class B office buildings and high-speed internet in some areas of the County are challenges for this target.

Target rationales include:

- Existence of major military aviation installations in the area (P)
- High number of military veterans in area with technical skills (P) (C)
- *Computer & Mathematical* occupations grew by 30% in past 5 years (P)
- *Installation, Maintenance & Repair* occupations grew by 16% in past 5 years (P)
- An existing pool of high-demand occupations and occupations with skills transferability (P)
- *Professional, Scientific & Technical Services* industry sector grew by 6% in past 5 years (P)
- More than 2,283 degrees and certificates granted for in majors related to information technology, cybersecurity & related services (P)(C)
- Proximity to Pensacola Int'l Airport (P) (C)
- Within ½ hour of major university/ college (P)(C)
- Post-secondary vocational training (P)
- Nearby engineering program (P)(C)
- Relatively low cost of labor (P)
- Availability of local incentives (P)
- Relatively low cost of living (P)(C)
- Quality of education K-20+ (P) (C)
- Cybersecurity & IT academies at multiple middle and high schools in Santa Rosa County (P) (C)

Legend: Items appealing to needs of prospects (P) or community (C).

Target rationales continued:

- Historical national 10-year job growth of 33.9% (P)(C)
- Historical national 10-year GDP growth of 64.3% (P)(C)
- U.S. job growth forecast 13.7% for next decade (P)(C)
- Santa Rosa County labor shed 10-year job growth of 6.5%
- Santa Rosa County labor shed 10-year job forecast growth of 17.3% (P) (C)

Legend: Items appealing to needs of prospects (P) or community (C).

Table 3.13 Cybersecurity & Facility Tech Job & GDP Trend & Outlook, 2021

NAICS	Industry	United States			Santa Rosa County 30-Minute Drive Time			
		10-Year % GDP Change	10-Year Employment Change %	10-Year Employment Forecast %	10-year % GDP Change*	10-Year Employment Change %	10-Year Employment Forecast %	LQ
5415	Computer Systems Design and Related Services	89.1%	48.7%	22.5%	12.1%	24.0%	28.7%	0.4
54133	Engineering Services	34.7%	18.0%	0.8%	-37.7%	-12.8%	7.0%	0.8
54138	Testing Laboratories and Services	33.5%	14.1%	1.8%	-51.4%	30.4%	7.2%	0.6
54142	Industrial Design Services	110.5%	60.1%	5.1%	n/a	262.2%	15.2%	0.5
541614	Process, Physical Distribution, and Logistics Consulting Services	56.2%	53.1%	20.3%	62.3%	193.0%	25.6%	0.7
541715	R&D in the Physical, Engineering, and Life Sciences	49.1%	18.0%	6.1%	798.5%	80.5%	13.8%	0.1
56121	Facilities Support Services	29.7%	20.8%	2.8%	10.3%	-1.1%	14.8%	6.0
Total Target		64.3%	33.9%	13.7%	-0.6%	6.5%	17.3%	0.7

* GDP figures are for Santa Rosa County only. Source: JobsEQ, Garner Economics

Occupations

Computer & Mathematical occupations grew by 30% over the past 5 years adding more than 200 jobs. Additionally, Installation, Maintenance & Repair occupations increased by 16% gaining 281 jobs for the same period. The top occupations for the Cybersecurity & Facility Tech target are a mix of jobs from a variety of fields and are derived from studying staffing patterns in the target industry family. These occupations are listed with employment levels from several different aspects:

1. Those who work at companies located in Santa Rosa County, regardless of where workers reside.
2. Workers who live in Santa Rosa County within that occupation category, regardless of where they work.
3. People who live within a 30-minute drive from Santa Rosa County for each occupation. This figure is recommended to market the talent potential.

Location Quotients (LQ) show the concentration of an industry or occupation in an area relative to the national level of concentration and is a good indicator of strength. An LQ of 1.2 or more is favorable showing a local specialization. Most jobs in this target need a college education with a handful requiring high school and experience or moderate on-the-job training with one position needing just short-term training. Occupations in Table 3.14 show a variety of typical requirements showing the need for higher education and technical training.

Table 3.14 Cybersecurity & Facility Tech Target Top Occupations, 2021
Sorted by Employment-Live within 30-Minute Drive

SOC	Occupation	Employment (Work in County)	Employment (Live in County)	Employment (Live 30-Minute Drive)	LQ (30-Minute Drive)	Typical Education & Training
43-4051	Customer Service Representatives	843	1,636	4,134	1.2	HS, Short-Term
11-1021	General and Operations Managers	784	1,435	3,370	0.9	B, 5 yrs+
37-2011	Janitors and Cleaners	889	1,392	3,062	1.1	Short-Term
43-1011	Supervisors of Office and Administrative Support Workers	397	816	2,094	1.2	HS, < 5 yrs
13-1199	Business Operations Specialists	340	669	1,570	0.9	B
41-3091	Sales Representatives of Services	321	552	1,297	1.0	HS, Moderate-Term
15-1252	Software Developers	311	566	1,309	0.5	B
13-1111	Management Analysts	231	457	1,126	0.9	B, < 5 yrs
13-1082	Project Management Specialists	247	430	1,007	0.9	B
13-1071	Human Resources Specialists	164	344	905	0.9	B
13-1161	Market Research Analysts and Marketing Specialists	147	275	710	0.7	B
15-1232	Computer User Support Specialists	126	303	717	0.8	Some College, Moderate-Term
15-1211	Computer Systems Analysts	81	176	475	0.7	B
11-3021	Computer and Information Systems Managers	70	156	403	0.6	B, 5 yrs+
51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	64	144	367	0.5	HS, Moderate-Term
15-1244	Network and Computer Systems Administrators	62	166	383	0.8	B
17-2051	Civil Engineers	74	157	382	0.8	B
15-1299	Computer Occupations, All Other	71	148	348	0.5	B
17-2112	Industrial Engineers	27	65	196	0.5	B
41-4011	Sales Representatives, Technical and Scientific Products	38	57	170	0.6	B, Moderate-Term
15-1253	Software Quality Assurance Analysts and Testers	49	76	206	0.7	B
15-1231	Computer Network Support Specialists	42	105	222	0.8	A, Moderate-Term
15-1212	Information Security Analysts	23	51	162	0.7	B, < 5 yrs
17-2141	Mechanical Engineers	25	59	168	0.4	B
17-2199	Engineers, All Other	32	77	192	0.7	B
17-2071	Electrical Engineers	25	48	140	0.5	B
11-9041	Engineering Managers	22	49	129	0.5	B, 5 yrs+
15-1241	Computer Network Architects	25	76	149	0.5	B, 5 yrs+
15-1251	Computer Programmers	23	36	109	0.5	B
15-2051	Data Scientists	14	31	93	0.6	B
17-3022	Civil Engineering Technicians	16	47	95	0.9	A,
17-2061	Computer Hardware Engineers	11	19	39	0.3	B

Source: JobsEQ, 2021 Average. Employment — Work in County represents those employed by companies located in Santa Rosa County regardless of where workers reside. Employment — Live in County represents those who reside in Santa Rosa County regardless of where they work. Employment-Live Within 30 Minute Drive of Santa Rosa County.

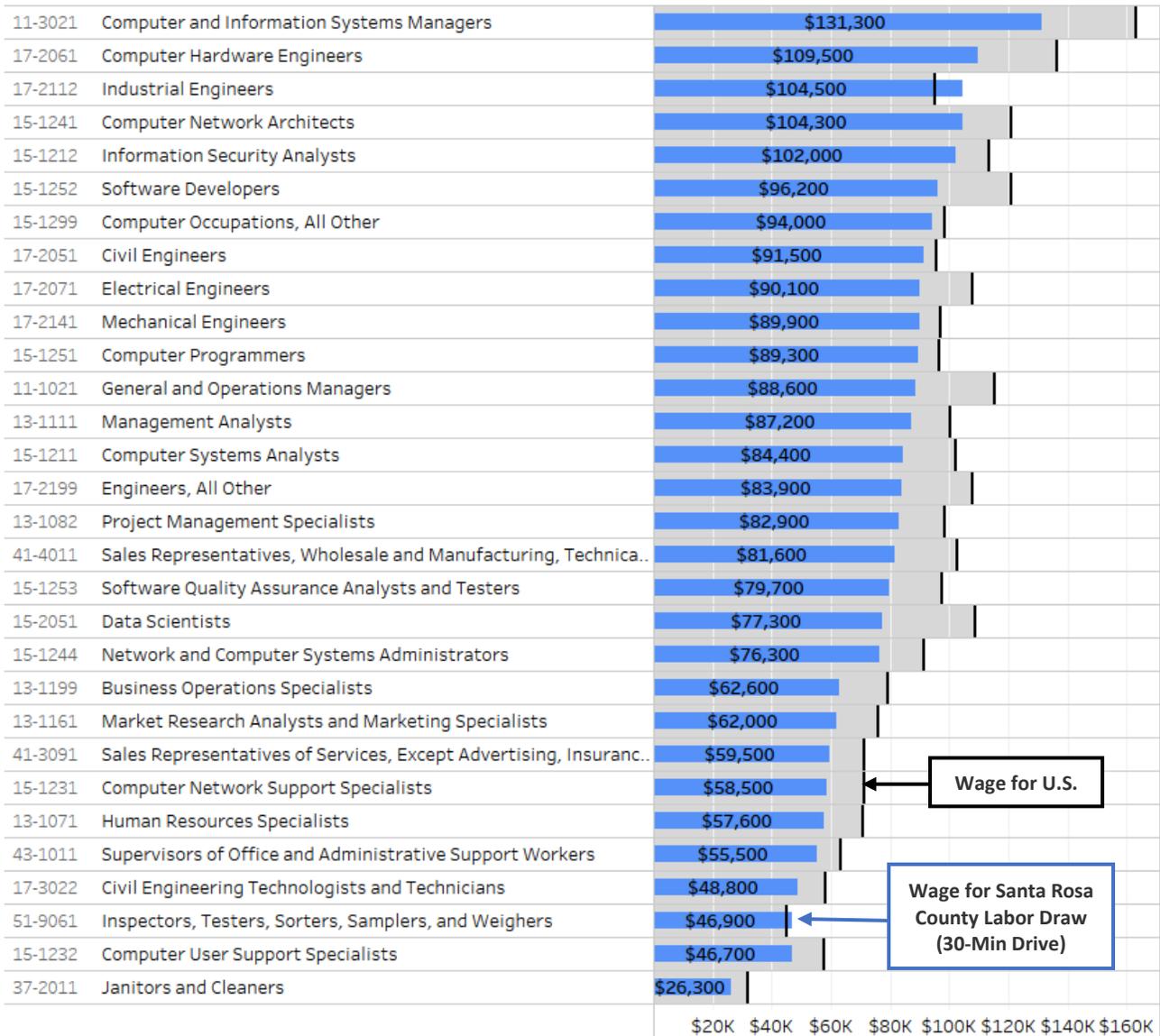
Typical Education & Training shows the typical education, on-the-job training, and experience needed to work in a given occupation.

Legend: HS-High School, B-Bachelor Degree, C-Certification, Some College-College courses no degree.

Wages

Figure 3.7 exhibits the average annual wages per worker for the top occupations for the Cybersecurity & Facility Tech target compared to wages for each occupation nationally. All but two positions in this occupation mix are below national levels and can be marketed as cost savings for companies.

**Figure 3.7: Cybersecurity & Facility Tech Target Wages, 2021
Santa Rosa County 30-Minute Drive-Time, United States**



Source: JobsEQ, 2021 Average Annual Salary, Garner Economics

Transferable Skills

Information Technology is changing and becoming more advanced leveraging a variety of technical skills. Many positions in the Cybersecurity & Facility Tech target have related jobs that may have transferable skills to allow career development or changing fields to more promising opportunities. From the top occupations listed in Table 3.14, the highest-paying occupations were analyzed for occupations with transferable skills and lower annual pay rates.

Relationships between occupations are established based on knowledge, skill, and ability levels. O*NET, a national source for occupational information, provides comparisons between positions. Table 3.15 shows the top positions and five relatable positions with transferable skills.

Table 3.15: Cybersecurity & Facility Tech Target High-Paying Occupations and Skills-Transferable Occupations

High-Wage Occupations	Average Wage	Transferable Occupation	2022 Employment	Average Wage
Computer and Information Systems Managers	\$131,300	Computer Systems Analysts	440	\$84,400
		Information Security Analysts	147	\$102,000
		Electrical Engineers	125	\$90,100
		Network and Computer Systems Administrators	321	\$76,300
		Computer Network Architects	108	\$104,300
Computer Hardware Engineers	\$109,500	Electrical Engineers	125	\$90,100
		Engineers, All Other	133	\$83,900
		Mechanical Engineers	145	\$89,900
		Civil Engineers	309	\$91,500
		Electronics Engineers, Except Computer	76	\$102,700
Industrial Engineer	\$104,500	Architects, Except Landscape and Naval	125	\$77,700
		Construction Managers	673	\$89,300
		Supervisors of Mechanics, Installers, and Repairers	719	\$64,900
		Construction and Building Inspectors	171	\$53,500
		Civil Engineers	309	\$91,500
Computer Network Architects	\$104,300	Electronics Engineers, Except Computer	76	\$102,700
		Network and Computer Systems Administrators	321	\$76,300
		Telecommunications Equipment Installers and Repairers	265	\$52,600
		Computer Science Teachers, Postsecondary	160	\$53,700
		Logisticians	141	\$74,500
Information Security Analysts	\$102,000	Network and Computer Systems Administrators	321	\$76,300
		Career/Technical Education Teachers, Secondary School	200	\$69,900
		Computer Science Teachers, Postsecondary	160	\$53,700
		Electrical and Electronic Engineering Technicians	93	\$60,200
		Computer Systems Analysts	440	\$84,400

Source: JobsEQ, 2022 average (employment), 2021 (wages). Job transferability based on O*Net crosswalk and JobsEQ training rank, Garner Economics

Education and Training

Overall, colleges and universities in a 45-minute drive-time area granted 2,283 certificates and degrees in areas related to Cybersecurity & Facility Tech occupations in 2021. Positions are varied in this target, however, most of the top occupations need post-secondary education. In 2021, 375 *Computer & Information Science* degrees and certificates were awarded in the region ranging from certificates taking less than 2 years to graduate-level work.

Multiple cybersecurity academies are in place within Santa Rosa County school system beginning training as early as middle school and continuing into high school. Academies include:

- Academy of Information Technology & Cybersecurity
- Applied Cybersecurity
- Digital Literacy Academy
- Gaming & Simulation Academy
- Microsoft I.T. Academy

Table 3.16: Regional Degree Completions in Majors Related to Cybersecurity & Facility Tech, 2021

Degrees by Area of Study	Certificate	Associate	Bachelor	Graduate	Number of Degrees 2021
Business, Management & Marketing	167	108	525	212	1,012
Engineering Technologies & Related	249	100	34		383
Computer & Information Sciences	63	125	164	23	375
Mechanic & Repair Technologies	211	22			233
Communication & Related	3	6	97	17	123
Engineering			108		108
Mathematics & Statistics			14	35	49
Grand Total	693	361	942	287	2,283

Source: National Center for Education Statistics, Garner Economics

Graduates from Embry Riddle Pensacola campus, Coastal Alabama Community College Brewton Campus, or FSU Pensacola Regional Medical School Campus are not captured in this table. Table reflects reported degrees/certificates granted at the University of West Florida, Pensacola State College, Northwest Florida State College, Fortis Institute, George Stone Technical College, Locklin Technical College, and Florida Institute of Ultrasound.



Experiential Economy



The Experiential Economy target has a narrow focus for Santa Rosa County offering unique and memorable experiences and producing the equipment to experience it with. One of the recommendations given in this report is to develop a recreational venue or complex that potentially attracts sporting events and tournaments. This venue would meet resident needs and also serve as a destination attraction.

The coastal location with easy access via I-10, Pensacola International Airport and Ft. Walton Beach Airport, makes Santa Rosa County a good fit for attracting sporting or similar events. The development of a venue can host events drawing tourists, competitors and their families to the area. This also introduces Santa Rosa County to a new audience continually. Additional details on this recommendation are in chapter 4.

Retail offerings are a complement to sporting and other events that will draw in visitors. Developing diverse retail options will serve existing residents and visitors alike.

For this target family, this industry sector, *Promoters of Performing Arts, Sports, and Similar Events*, can be done with or without owning a facility or complex. In terms of occupations, this is a mix of marketing, facility management, logistics, and sports officials or other subject experts.

The other side to this target is the manufacture of sports equipment. As an integral part of the experience, the manufacturers of sporting goods used in the venue or event are excellent targets. Santa Rosa County has a growing manufacturing industry (44.6% in the past 5 years), available sites, and a pool of skilled labor.

Competitive sports are a lifestyle for many and putting together sports events, diverse retail options, and the manufacturing of sporting equipment serves to connect the passion and synergy around a sport to anchor that to Santa Rosa County.

Target rationales include:

- Coastal location (P) (C)
- Proximity to Pensacola Int'l Airport (P) (C)
- An existing pool of high-demand occupations and occupations with skills transferability (P)
- High number of military veterans in area with technical skills (P) (C)
- *Manufacturing* industry sector grew by 44.6% in past 5 years (P)
- *Production* occupations grew by 23% in past 5 years (P)
- More than 2,642 degrees and certificates granted for in majors related to target (P)(C)
- Within ½ hour of major university/ college (P)(C)
- Post-secondary vocational training (P)
- Nearby engineering program (P)(C)
- Relatively low cost of labor (P)
- Availability of local incentives (P)
- Relatively low cost of living (P)(C)
- Quality of education K-20+ (P) (C)
- Historical national 10-year job growth of 24.4% and GDP growth of 35.1% (P)(C)
- National job growth forecast 61.9% for next decade (P)(C)
- Santa Rosa County labor shed 10-year job growth of 71.5% and 10-year forecast of 86% (P) (C)
- Santa Rosa County 10-year GDP growth of 60.5% (P)(C)

Legend: Items appealing to needs of prospects (P) or community (C).

Table 3.17 Experiential Economy Job & GDP Trend & Outlook, 2021

		United States			Santa Rosa County 30-Minute Drive Time			
NAICS	Industry	10-Year % GDP Change	10-Year Employment Change %	10-Year Employment Forecast %	10 -year % GDP Change*	10-Year Employment Change %	10-Year Employment Forecast %	LQ
7113	Promoters of Performing Arts, Sports, and Similar Events	26.6%	29.3%	79.9%	-21.4%	70.0%	90.0%	1.7
339920	Sporting and Athletic Goods Manufacturing	49.9%	11.5%	7.3%	302.4%	106.1%	10.7%	0.3
Total Target		35.1%	24.4%	61.9%	60.5%	71.5%	86.0%	1.3

* GDP figures are for Santa Rosa County only. Source: JobsEQ, Garner Economics

Occupations

Production occupations grew by 23% over the past 5 years gaining 237 jobs. The top occupations for the Experience Economy target are a wide mix of jobs from both hospitality and production. These are gathered from studying staffing patterns in the target industry family. These occupations are listed with employment levels from several different aspects:

1. Those who work at companies located in Santa Rosa County, regardless of where workers reside.
2. Workers who live in Santa Rosa County within that occupation category, regardless of where they work.
3. People who live within a 30-minute drive from Santa Rosa County for each occupation. This figure is recommended to market the talent potential.

Location Quotients (LQ) show the concentration of an industry or occupation in an area relative to the national level of concentration and is a good indicator of strength. An LQ of 1.2 or more is favorable showing a local specialization.

Education and training levels needed for entry into target occupations vary from no education needed to a degree and five years of experience. Occupations in Table 3.18 show a variety of typical requirements.

Table 3.18 Experiential Economy Target Top Occupations, 2021
Sorted by Employment-Live within 30-Minute Drive

SOC	Occupation	Employment (Work in County)	Employment (Live in County)	Employment (Live 30-Minute Drive)	LQ (30-Minute Drive)	Typical Education & Training
35-3023	Fast Food and Counter Workers	1,615	2,277	4,912	1.3	Short-Term
41-2011	Cashiers	1,648	2,308	4,899	1.2	Short-Term
43-4051	Customer Service Representatives	843	1,636	4,134	1.2	HS, Short-Term
11-1021	General and Operations Managers	784	1,435	3,370	0.9	B, 5 yrs+
37-2011	Janitors and Cleaners	889	1,392	3,062	1.1	Short-Term
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	388	782	1,983	0.6	Short-Term
43-3031	Bookkeeping, Accounting, and Auditing Clerks	454	846	2,034	1.0	Some College, Moderate-Term
49-9071	Maintenance and Repair Workers	558	924	2,003	1.0	HS, Moderate-Term
37-3011	Landscaping and Groundskeeping Workers	702	894	1,751	1.2	Short-Term
13-2011	Accountants and Auditors	298	599	1,542	0.9	B
33-9032	Security Guards	192	468	1,300	1.0	HS, Short-Term
13-1199	Business Operations Specialists	340	669	1,570	0.9	B
41-3091	Sales Representatives of Services	321	552	1,297	1.0	HS, Moderate-Term
13-1082	Project Management Specialists	247	430	1,007	0.9	B
35-3011	Bartenders	221	412	1,004	1.4	Short-Term
13-1161	Market Research Analysts and Marketing Specialists	147	275	710	0.7	B
51-2092	Team Assemblers	111	227	596	0.4	
51-1011	Supervisors of Production and Operating Workers	105	192	496	0.7	HS, < 5 yrs
49-9099	Installation, Maintenance, and Repair Workers	84	135	319	1.4	HS, Moderate-Term
39-3091	Amusement and Recreation Attendants	91	161	381	0.8	Short-Term
27-3031	Public Relations Specialists	63	104	289	0.9	B
11-2021	Marketing Managers	47	73	225	0.6	B, 5 yrs+
27-1024	Graphic Designers	63	93	211	0.7	B
53-6021	Parking Attendants	38	49	125	1.3	Short-Term
13-1121	Meeting, Convention, and Event Planners	31	38	110	0.9	B
39-1014	Supervisors of Entertainment and Recreation Workers	30	46	106	1.0	HS, < 5 yrs
39-3031	Ushers, Lobby Attendants, and Ticket Takers	24	41	106	1.0	Short-Term
27-2012	Producers and Directors	23	31	74	0.4	B, < 5 yrs
27-4011	Audio and Video Technicians	18	47	88	0.9	C, Short-Term
27-2023	Umpires, Referees, and Other Sports Officials	4	7	20	0.9	HS, Moderate-Term

Source: JobsEQ, 2021 Average. Employment — Work in County represents those employed by companies located in Santa Rosa County regardless of where workers reside. Employment — Live in County represents those who reside in Santa Rosa County regardless of where they work. Employment-Live Within 30 Minute Drive of Santa Rosa County.

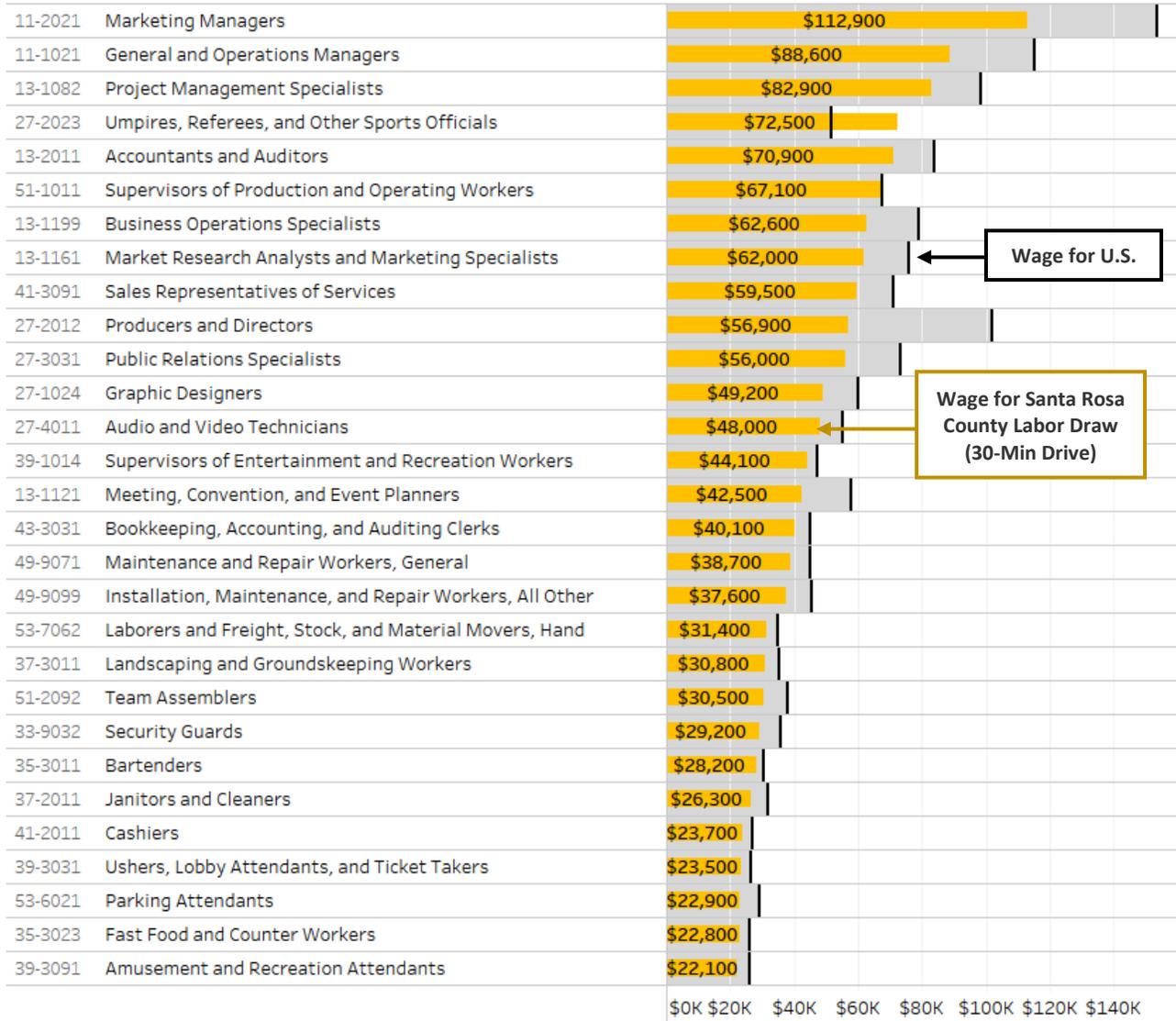
Typical Education & Training shows the typical education, on-the-job training, and experience needed to work in a given occupation.

Legend: HS-High School, B-Bachelor Degree, C-Certification, Some College-College courses no degree.

Wages

Figure 3.8 exhibits the average annual wages per worker for the top occupations for the Cybersecurity & Facility Tech target compared to wages for each occupation nationally. All but one position – *Umpires, Referees, and Other Sports Officials* – in this occupation mix are below national levels and can be marketed as cost savings for companies.

**Figure 3.8: Experiential Economy Target Wages, 2021
Santa Rosa County 30-Minute Drive-Time, United States**



Source: JobsEQ, 2021 Average Annual Salary, Garner Economics

Transferable Skills

The Experiential Economy target has varied positions encompassing both the hosting of events and production. Many of these occupations have related jobs that may have transferable skills to allow career development or changing fields to more promising opportunities. From the top occupations listed in Table 3.18, the highest-paying occupations were analyzed for occupations with transferable skills and lower annual pay rates.

Relationships between occupations are established based on knowledge, skill, and ability levels. O*NET, a national source for occupational information, provides comparisons between positions. Table 3.19 shows the top positions and five related positions with transferable skills.

Table 3.19: Experiential Economy Target High-Paying Occupations and Skills-Transferable Occupations

High-Wage Occupations	Average Wage	Transferable Occupation	2022 Employment	Average Wage
Marketing Managers	\$112,900	Market Research Analysts and Marketing Specialists	703	\$62,000
		Public Relations Specialists	287	\$56,000
		Sales Managers	421	\$107,300
		Management Analysts	1,003	\$87,200
		Interior Designers	114	\$56,400
General and Operations Managers	\$88,600	Architects	125	\$77,700
		Supervisors of Mechanics, Installers, and Repairers	719	\$64,900
		Logisticians	141	\$74,500
		Farmers, Ranchers, and Other Agricultural Managers	477	\$82,900
		Purchasing Agents	287	\$62,300
Umpires, Referees, and Other Sports Officials	\$72,500	Social and Community Service Managers	196	\$65,000
		First-Line Supervisors of Firefighting and Prevention Workers	138	\$62,600
		Dietitians and Nutritionists	100	\$62,600
		Substance Abuse, Behavioral Disorder, and Mental Health Counselors	364	\$49,000
		Training and Development Specialists	389	\$57,500
Accountants & Auditors	\$70,900	Financial Examiners	113	\$49,800
		Property, Real Estate, and Community Association Managers	484	\$61,300
		Sales Representatives of Services	1,274	\$59,500
		Securities, Commodities, and Financial Services Sales Agents	1,339	\$62,600
		Loan Officers	1,175	\$60,800
Supervisors of Production and Operating Workers	\$67,100	Supervisors of Mechanics, Installers, and Repairers	719	\$64,900
		Supervisors of Construction Trades and Extraction Workers	1,154	\$59,800
		Electrical and Electronic Engineering Technicians	93	\$60,200
		Chemical Equipment Operators and Tenders	177	\$50,100
		Computer Numerically Controlled Tool Operators	85	\$39,900

Source: JobsEQ, 2022 average (employment), 2021 (wages). Job transferability based on O*Net crosswalk and JobsEQ training rank, Garner Economics

Education and Training

Overall, colleges and universities in a 45-minute drive-time area granted 2,642 certificates and degrees in areas related to Experience Economy occupations in 2021. Positions are varied in this target including manufacturing and production-oriented education along with sports and leisure studies.

Table 3.20: Regional Degree Completions in Majors Related to the Experiential Economy, 2021

Degrees by Area of Study	Certificate	Associate	Bachelor	Graduate	Number of Degrees 2021
Business, Management & Marketing	167	108	525	212	1,012
Engineering Technologies & Related	249	100	34		383
Computer & Information Sciences	63	125	164	23	375
Precision Production	239				239
Mechanic & Repair Technologies	211	22			233
Parks, Recreation, Leisure & Fitness		20	135	12	167
Engineering			108		108
Visual & Performing Arts	2	13	61		76
Mathematics & Statistics			14	35	49
Grand Total	931	388	1,041	282	2,642

Source: National Center for Education Statistics, Garner Economics

Graduates from Embry Riddle Pensacola campus, Coastal Alabama Community College Brewton Campus, or FSU Pensacola Regional Medical School Campus are not captured in this table. Table reflects reported degrees/certificates granted at the University of West Florida, Pensacola State College, Northwest Florida State College, Fortis Institute, George Stone Technical College, Locklin Technical College, and Florida Institute of Ultrasound.

Chapter 4: Recommendations to Achieve Success

An effective economic development strategy takes a holistic approach to achieve success. It is based on a three-pillar approach of recruitment (including retail and tourism), business retention, and entrepreneurship. workforce preparedness is an integral part of this effort. This strategy encompasses this three-pillared approach.

To ensure that Santa Rosa County (SRC) can meet its full potential, leverage its assets, and strengthen its business climate to retain current companies and attract the recommended business targets, the County, its EDO and its many partners must be proactive in driving the County's economic future and setting it apart from peers and competitors.

The following observations, conclusions, and recommendations are based on data and feedback collected during Phase One of this project and summarized in the previously published [COMPETITIVE REALITIES REPORT](#). They also build upon the assessments made to identify the business targets suggested in Chapter 3.

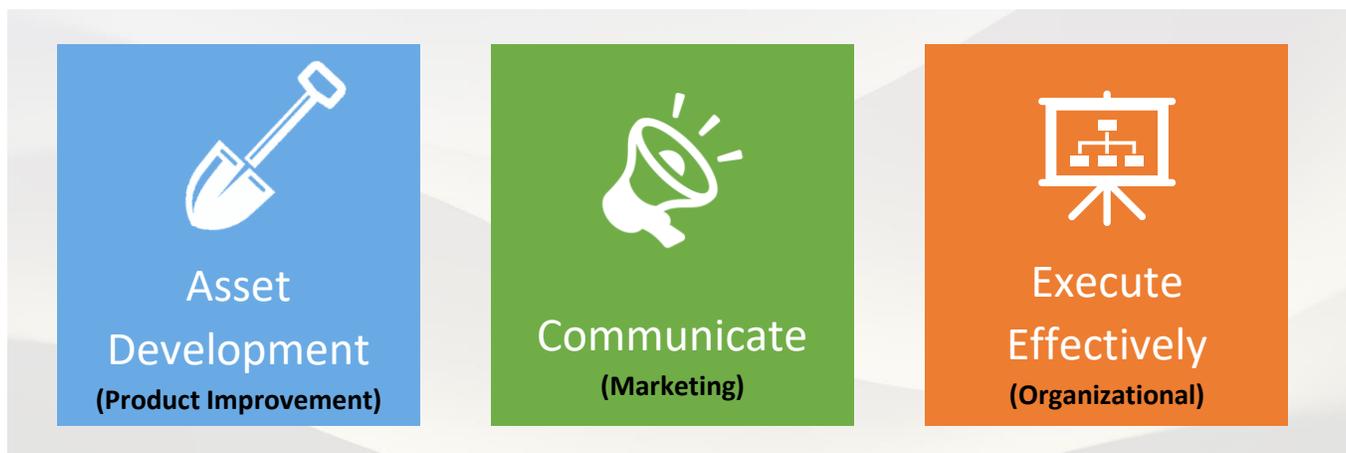
The end goal of **LEADING THROUGH ACTION: AN ECONOMIC DEVELOPMENT STRATEGY FOR SANTA ROSA COUNTY** is to help strengthen the county's business climate, so the community can attract and retain talent, investment and diversify the economy in a way that is sustainable. The strategy's main objective is to provide a framework for the County and EDO to more effectively organize and resource its economic development service delivery and activities to support and augment the area's ability to attract and retain investment.

As evidenced by feedback in the stakeholder engagement process, there is strong consensus that through the leadership of the County and its EDO, the previous plan of 2018 is exceeding its goals. Comments are indicative of how the County and its partners have enhanced its economic development performance.

In the initial strategy of 2018 titled *Building a Better Santa Rosa County*, Garner Economics offered 20 recommendations for the County/EDO to implement that were related to their organization, or a collective group of organizations needed to take on to enhance the competitiveness of the county. A scorecard of these recommendations and related progress is included in Chapter 2 of this report.

Both the 2018 strategy and the current plan were developed from a site selector's perspective. The recommendations are built with an eye toward those areas that may differentiate the county.

Recommendations for action are categorized under three areas of opportunity: **Asset Development (Product Improvement)**, **Communicate (Marketing)** and **Execute Effectively (Organizational)**. Within the recommendations, where appropriate or possible, an estimated budget and lead organization are noted as well as a timeline. An asterisk (*) in front of the recommendation indicates a transformative recommendation that could have a significant positive impact on the area if implemented.





Use product improvement initiatives to ensure Santa Rosa County can compete to attract, retain, and grow the types of companies and talent the community desires.

1. *Develop a sports complex for local use and as a destination attraction in amateur sports.

Focus groups, interviews and survey participants who responded to the electronic survey used in our discovery process voiced a need for recreational venues (e.g., a variety of ball fields, etc.) for families and children in the County.

In addition to answering to resident needs, such venues—if created on a scale and quality to differentiate them from traditional community activity centers—have the added benefit of potentially attracting sports tourism groups by hosting tournaments and other events that would drive overnight visits to the area. Youth sports and sports-related travel are creating an approximate economic impact of \$7 billion per year nationally, according to the consulting firm Sports Facilities Advisory of Clearwater, Florida. Attracting travel teams in youth sports such as soccer, basketball, baseball, softball, lacrosse, gymnastics, swimming, or football is a significant economic generator for communities with the infrastructure to accommodate them. Adult sports in pickleball and tennis also draw large groups (as noted by the Opelika example below).

A new complex in Santa Rosa County could anchor such activity; the area’s proximity to multiple commercial airports in Pensacola, Ft. Walton Beach and Panama City, is easy driving distance to SRC. Its Gulf coast location along I-10 makes automobile access seamless.

By taking the need to meet resident demands for more recreational facilities a step further, a sports complex designed to also attract regional and national amateur and youth tournaments could serve as an economic generator for the County and grow its sales and lodging tax by driving more travel and overnight visitation to the area. This would, in turn, increase demand for food and accommodations, shops, sports retail stores, and more. **The County should conduct a feasibility analysis of building and operating a youth and amateur sports complex that would be used by local citizens and out-of-town visitors.** The analysis should take into account any existing venues in the region and identify a niche for SRC (such as aquatic-related) that is aligned with resident demands and economic opportunity from out-of-town “customers”.



We are suggesting that the County explore on-site, best practice examples of successful complexes to learn what each has done effectively, and identify best practices that could be applied to SRC and the community’s local-use needs. If the County determines the market demand is sufficient to proceed with developing the complex, it should also consider recruiting or partnering with a private developer to help absorb some of the risk and costs involved in such a capital-intensive project, as well as to provide marketing and operational support to establish the complex among regional and national sports tournament organizers. At the very least, financial participation from Triumph funds would appear logical and fit the participation model by the Triumph board.

Best practice examples: A multitude of communities have made youth (and adult) sports a priority for their community to serve the local needs and to serve as an economic generator and sports tourism demand driver. The following municipalities offer best practice examples:

- Round Rock, Texas <https://rrsportscenter.com/>
- Acworth/Emerson, GA <https://lakepointsports.com/>
- Opelika, AL <https://www.opelika-al.gov/391/Opelika-Sportsplex-Aquatics-Center>
- Sandusky, Ohio <https://sportsforceparkssandusky.com/explore-the-park>

Cost: \$35,000+/- to test the market (feasibility analysis and initial pro forma).

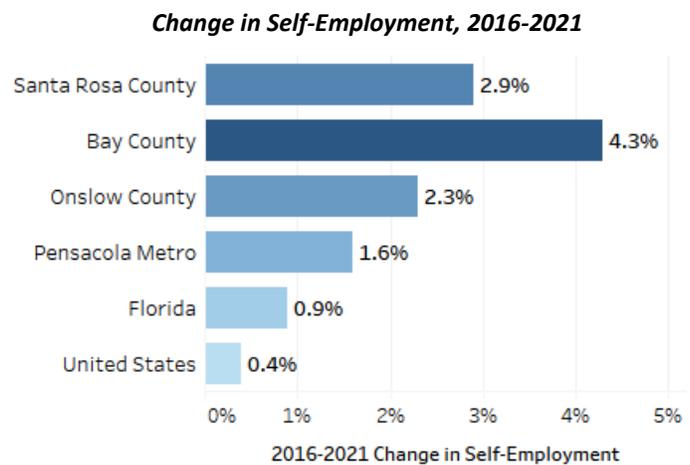
Lead entity: Santa Rosa County Commission; Visit Santa Rosa

2. *Create an Entrepreneurial Center (or Knowledge Center) that would include a small-business incubator and makerspace.

The Kauffman Foundation suggests that, nationally, new firms and young businesses disproportionately contribute to net job creation throughout the economy and account for more than two-thirds of gross job creation. Tracking the employment by new firms, those established less than one year, is a good measure of the entrepreneurial ecosystem of an area. The ability to create a new company and new jobs helps to bolster the local economy. New firms play an important role in employment growth as a result of their disproportionate contribution to job creation.

At the local level, measuring the proportion of self-employed people is a rough means to gauge entrepreneurial activity, which, in turn, can provide a view of local risk-taking and economic dynamism.

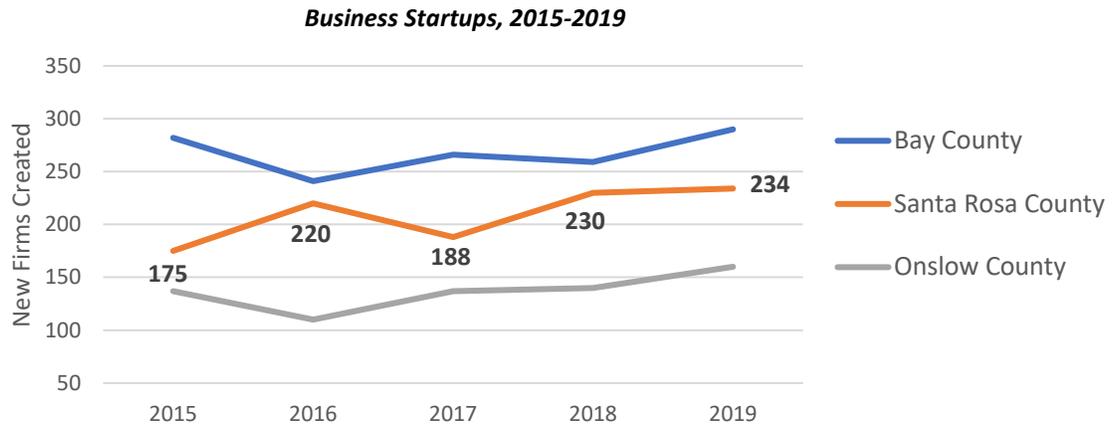
Santa Rosa County has a self-employment rate of 12.4% for 2021. This measure includes self-employed individuals who are incorporated as well as those who are unincorporated or unpaid family workers. This rate rose from 9.5% in 2016, a 2.9% increase. This growth is second only to Bay County which experienced a 4.3% growth in self-employment between 2016 and 2021.



Source: U.S. Census Bureau, Garner Economics

Another effective metric used to measure entrepreneurial growth is Startup Activity. The ability to create a new company establishes new jobs and helps bolster the local economy. Additionally, new firms contribute disproportionately to job creation and have an important role in employment growth.

Startup activity, measured at the county level, has increased for all three geographies over the past five years. Santa Rosa County saw the creation of 234 firms in 2019, slightly more than in 2018. Bay County’s firm creation out-numbers Santa Rosa County, however, both are above Onslow County’s startup activity.



Source: U.S. Census Bureau, Garner Economics

Let’s keep the momentum going! The SRC school system should take the lead in building the entrepreneurial ecosystem in the County by offering a curriculum introducing entrepreneurship. The County EDO should either find a vacant facility (approximately 2,000 sq. ft.) that will allow for the development of an Entrepreneurial Center (or Knowledge Center) or seek funding to construct one on a site such as Peter Prince Airport. This could be used to attract entrepreneurial development in the aviation sector and would make this incubator unique to the region.

Adding a [makerspace](#)¹ within the Entrepreneurial Center will allow the space to serve a broader range of entrepreneurial activities. For those not teaching entrepreneurship in their schools, they should be. The Aspen Institute has good research on this subject: [Why Schools Should Teach Entrepreneurship - The Aspen Institute](#).

Within the Entrepreneurial Center, small-business counseling should be housed in the new location, including offices of SCORE and the SBDC, along with any academic institutions instructing in entrepreneurship.

Best practice examples:

- Greensboro, North Carolina: <https://www.forgegreensboro.org/>
- Hartford, Connecticut: <https://makerspacect.com/join-the-movement/>
- Greenville, South Carolina: <http://synergymill.com/>

Lead entity: Santa Rosa County School District, Santa Rosa County Commission/EDO

¹ <https://usnewsglobaleducation.com/all-advice/what-is-a-makerspace/>

3. Undertake a housing analysis to determine mid to long-term housing options and affordability in Santa Rosa County.

“Not enough housing causes non-affordable housing.” Quoted by a Santa Rosa County Commissioner. He’s correct. As noted in our CRR, the availability of executive-level housing with prices starting at \$351,000 and greater is strong. Moderate-cost housing at \$150,000 to \$350,000 was rated as neutral, and the availability of apartments is strong, but with great demand since this is often considered “worker housing.” With mortgage interest rates on the rise, built-to-rent homes are expected to hit an all-time high in 2022, fueled by the need for space and privacy.² These types of development are a good investment for developers and a good tool to attract talent to a community that does not have the ability for a down payment or to pay high mortgage interest rates.

We recommend the County undertake a housing/land use analysis on where potential locations may occur for housing developments that specialize in rentals. Also, there should be no onerous regulatory environment that would prevent these types of subdivisions from being developed, as long as they go through the appropriate permitting process.

4. Develop an industrial spec building in the Milton Interchange Industrial Park.

Santa Rosa County has done a remarkable job in creating product to accommodate the county’s targeted industries, e.g. I-10 Industrial Park, Whiting Aviation Park and the new Milton Interchange Industrial Park. As we note in Chapter 2 of the book, *Economic Development Is Not For Amateurs!*, the title is No Product, No Project®. SRC has understood this mantra and has delivered! Now, we recommend the county take it to the next level by developing a 100,000-square-foot spec building that can be expandable to at least an additional 50,000 square feet. Why a spec building? It’s like selling a house. It’s a prospect generator. A spec building will draw interest from companies and consultants that need to accommodate deadlines. It allows for the county to satisfy the demand for speed to market.



We recommend that the design of the building be configured to accommodate the engineering needs of the larger footprint targets identified in Chapter 3. At the very least, a virtual spec building should be created for marketing purposes, and preliminary permitting approved to allow for speed to market once there is a commitment from a company to acquire the building.

Lead entity: Santa Rosa County EDO

² <https://www.rentcafe.com/blog/rental-market/market-snapshots/built-to-rent-single-family-homes-double-in-2022/>



Marketing approaches for the County to share the economic dynamism of the area with target prospects, talent and the local community

1. Communicate regularly with the County Commission on all things economic development.

The County’s EDO should meet quarterly in an environment that will allow the economic development team to communicate effectively on matters related to economic development, and without additional layers that could dilute the message. During our stakeholder engagement process, we captured comments that were not necessarily statements of fact or were a misunderstanding of the economic development process. These recommended communication sessions will allow for the policy makers (County Commission), and those that implement policy (staff) to have a mutual give-and-take on economic development initiatives and activities. We understand that this will need to be an open meeting based on Florida’s Sunshine Law. Nevertheless, a formalized regular communication process is needed.

2. Return to having a more proactive external outreach to companies and consultants.

It’s expensive to market a community domestically or globally. As such, we use the saying, *Market regionally, Sell locally*. Santa Rosa County should call on location advisors and companies where there are the highest concentration of advisors and companies, as identified in the target industry sectors chapter. The cluster of location advisors includes Atlanta/Greenville SC, Chicago, Dallas/Fort Worth, Los Angeles, and the New York/New Jersey metro. This should be done in partnership with the regional marketing group, Florida’s Great Northwest (FGNW). These outreach missions should be done no less than twice a year for both domestic and international company/consultant visitations. They could be done solo, or in tandem with the aforementioned regional economic development marketing group based on SRC’s effort to build the brand.

Finally, Santa Rosa County should return to participating in conferences of the Site Selectors Guild and other site selector targeted events. The Site Selectors Guild is the only association of the world’s foremost professional site-selection consultants. Guild members provide location strategies to corporations across the globe and for every industry, sector, and function. Other events for the SRC EDO to attend include IAMC and specific trade shows related to the County’s industry targets, such as global air shows, e.g. Paris Air Show, Farnborough and Singapore. To succeed with these targets, the County must “get in the game!”

Annual cost: \$30,000

3. Develop a Santa Rosa community pride campaign.

During our focus group sessions, we observed some of the community leadership conveying negative opinions about the community or the region, not maliciously, but because they weren't aware of the facts. This is primarily rooted in the issue of there not being one organization working to effectively present information of fact to the residents in an unbiased manner.

Santa Rosa EDO, the local Chambers of Commerce, and the CVB (Visit Santa Rosa) should lead the development of a community pride campaign to tout the positive attributes of SRC and to help create a large pool of ambassadors of local citizens as advocates of the area.

Cost: \$7-10,000



Organizational adjustments and programming that allow the County to work proactively in those areas that will directly impact the economic growth the community desires

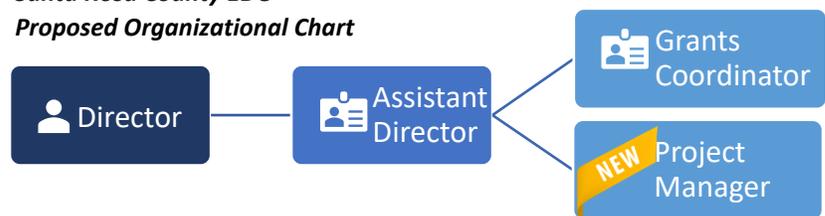
1. Add one additional full-time staff person at the County's Economic Development Office to focus on BRE and entrepreneurship.

The current staffing of the EDO consists of three full-time positions: a director, assistant director and grants coordinator. These positions cross multiple job descriptions and are engaged in many different facets. This economic development strategy **"Leading Through Action"** necessitates having the appropriate budget and staffing to raise the bar of economic development in the County. The SRC EDO needs one additional FTE that will focus on business retention and expansion and programming in marketing and entrepreneurship, as noted earlier in these recommendations. This person would be titled "project manager" and would also be engaged in other activities of the department as directed by the department head (director).

Timeline: 2024

Cost: \$50,000 +/- estimated

**Santa Rosa County EDO
Proposed Organizational Chart**



2. Conduct economic and community development leadership learning labs in other inspirational communities (community visits).

A community visit or learning lab is a trip to another city/county or region taken by a diverse delegation of leaders from a community's public, private, and nonprofit sectors to learn about broad issues related to economic development. These visits are typically led and facilitated by a community's chamber of commerce. In this case, we are suggesting the County's EDO partner with the local chambers of commerce and lead the first and include the appropriate partners that can help facilitate quality economic growth in the County.

With community visitation, the visiting delegation discusses challenges and opportunities its community is facing with leaders of the host community. The visit provides an opportunity for interaction among local leaders and facilitates the exchange of best practices and lessons learned between the two areas. These visits are often organized annually, serving as a regularly scheduled opportunity for collective community visioning. An inspirational community or region should be discussed and voted upon as the first of these learning labs.

Locations for consideration include: Franklin/Williamson County, TN; Clarksville/Montgomery County, TN; Fairhope/Baldwin County, AL; Chattanooga/Hamilton County, TN. These locations are all on an interstate, have high growth, some have a military presence (Clarksville), and can offer aspirational guidance related to community development.

Timeline: 2024-2028

Best practice example: Greater Waco Chamber of Commerce [InterCity Leadership Visit](#)

Recommendations Summary

Strategy	Action	Estimated Cost	Timing	Lead Entity
 Asset Development (Product Improvement)	1. *Develop a sports complex for local use and as a destination attraction in amateur sports.	\$35,000+/- (feasibility analysis and initial pro forma).	2024	Santa Rosa County Commission/EDO; CVB (Visit Santa Rosa)
	2. *Create an Entrepreneurial Center (or Knowledge Center) that would include a small-business incubator and makerspace.		2024-25	Santa Rosa County School District, Santa Rosa County Commission/EDO
	3. Undertake a housing analysis to determine mid to long-term housing options and affordability in Santa Rosa County.		2025	
	4. Develop an industrial spec building in the Milton Interchange Industrial Park.		2024-25	Santa Rosa County EDO
 Communicate (Marketing)	1. Communicate regularly with the County Commission on all things economic development.		2023-2027	Santa Rosa County EDO
	2. Return to having a more proactive external outreach to companies and consultants.	Annual cost: \$30,000	2023-2037	Santa Rosa County EDO
	3. Develop a Santa Rosa community pride campaign.	\$7-10,000	2024	Santa Rosa EDO, Chambers of Commerce & CVB (Visit Santa Rosa)
 Execute Effectively (Organizational)	1. Add one additional full-time staff person at the County's Economic Development Office to focus on BRE and entrepreneurship.	\$50,000 +/- estimated	2024	Santa Rosa County EDO
	2. Conduct economic and community development leadership learning labs in other inspirational communities (community visits).		2023-2027	Santa Rosa EDO & Chambers of Commerce

* transformative recommendation that could have a significant positive impact on the area if implemented

Chapter 5: Call to Action

With excellent transportation assets, a high in-demand housing and visitation location, a strong military presence, diverse natural resources, and effective public and private leadership, Santa Rosa County has a wealth of amenities that make it an ideal location for investment. The county has invested (wisely) in creating industrial product with the development of new industrial parks. Now is not the time to take your foot off the gas pedal. The bar needs to be raised.

Through this report, **LEADING THROUGH ACTION: AN ECONOMIC DEVELOPMENT STRATEGY FOR SANTA ROSA COUNTY**, community leaders can make long-term structural investments to ensure that the County can attract the types of activity it wants while also taking on game-changing initiatives to augment the area's quality of place assets.

To create such change, Santa Rosa County and its economic development office will facilitate dialogue with public and private leaders, be more proactive rather than reactive, and execute its economic development efforts differently. It will need to take the lead in proposing and attracting different types of activities and be a champion for long-term investments that will add to the community's product and quality of place for its citizens.

Thank you

Garner Economics would like to thank the Santa Rosa County Board of Commissioners, its economic development office led by Shannon Ogletree, and the more than one hundred people who participated in the stakeholder engagement process. Their feedback, compilation of data, and information—as well as their openness and willingness to explore various opportunities to strengthen operations—have contributed to the richness and rigor of this report.