

West Lake Helen Economic Development Plan



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Prepared By:



Funded By:



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Existing Conditions and Market Assessment

The City of Lake Helen, known as “The Gem of Florida”, is located in west Volusia County between the larger cities of DeLand to the north and Deltona to the south. Lake Helen citizens have worked hard to preserve their small town character and are proud of the City’s Victorian architecture and lush vegetation. However, like many other Florida jurisdictions, Lake Helen is struggling to strike a balance between maintaining its current standard of living and increasing the city’s tax base to pay for much needed services that contribute to the area’s high quality of life.

In 2013, Lake Helen officials approached the East Central Florida Regional Planning Council (ECFRPC) to develop an economic strategic plan for the city. The City was specifically interested in finding ways to take advantage of its location next to Interstate 4 (I-4) to attract new businesses to the city’s west side.

After much discussion, and the support of the University of Central Florida’s Master’s in Urban Planning Program, it was decided that the ECFRPC analysis would focus on the properties near the (I-4) interchange. This project is funded through the Department of Economic Opportunity’s Technical Assistance Grant program.

The purpose of this study is to analyze the potential for development of the properties on the City of Lake Helen’s west side. The project includes an existing conditions analysis that details the characteristics of the area including parcel size, current entitlements, and public services. The second part of this report is a market assessment that will provide a business profile of the three and five mile areas around the interchange study area. Finally, the ECFRPC prepared a detailed economic development plan for the west side of Lake Helen based on the data gathered from the existing conditions and business analyses.

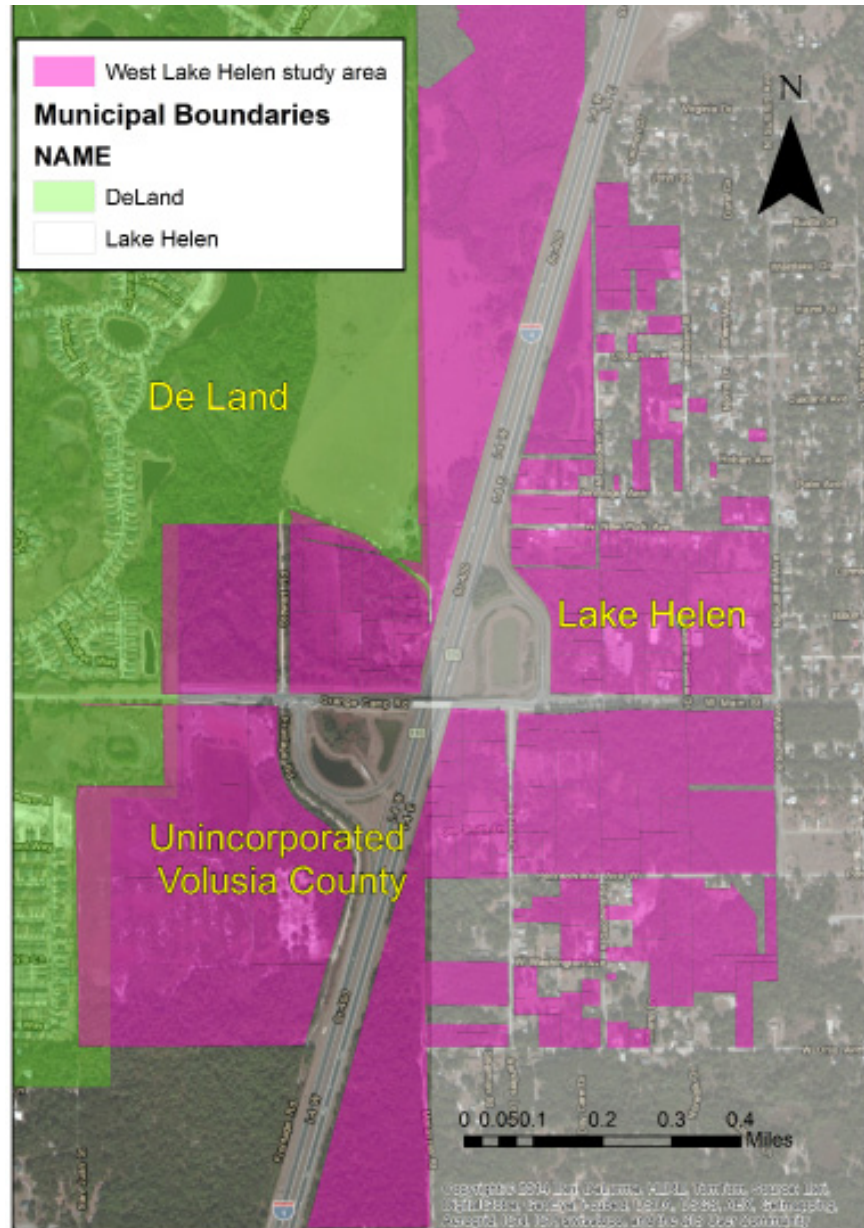
Study Area Definition and Project Methodology

To perform this study, ECFRPC staff used ARCGIS software to define both the original study area and create the market assessment areas. Using the I-4 Interchange as a center point, staff selected the properties within $\frac{1}{4}$ of a mile of this point to define the boundaries of the study area. After discussions with the City, some of the parcels were removed from the study area because they are entitled for residential uses. Another set of vacant parcels with commercial entitlements west of the aforementioned quarter mile area was also included in the study area.

1. Students from the University of Central Florida’s Master’s in Planning Program are currently working on a land use and economic plan for the east side of the city.

The final study area is depicted in Figure 1. It includes most properties west of County Road 4139, between New York and Ohio Streets, extending to the City’s western boundary. Some parcels north of this cluster were taken from the study area due to their size and geographic location. At the behest of the City, the study area also includes several parcels located in unincorporated Volusia County, west of the I-4 interchange. All parcel information used for this study was provided by the Volusia County Property Appraiser’s Office.

Figure 1: West Lake Helen Interchange Study Area



Once the study area was defined, staff proceeded to create three-mile and five-mile market assessment areas (Figure 2). The three-mile buffer was selected because this is the distance that most customers are willing to travel to obtain goods and services. The larger five-mile buffer not only serves as a comparison market area, but it also provides more information about the regional economy. These market areas include parts of the cities of DeLand, Deltona, and Orange City.

These buffers were uploaded to Infogroup's ReferenceUSA.gov database and used to select all businesses within the two market areas. These market areas are significant for the creation of the economic strategies for the City of Lake Helen. First, they help staff to develop a regional economic profile of the area and explore if there are any business agglomerations (often referred to as industry clusters) present. The City of Lake Helen could then focus on attracting similar types of businesses that complement the strengths of the study area. This analysis can also help to identify any gaps in services within the market area. The City of Lake Helen could target appropriate businesses that fill the region's needs for these services. Finally, the interchange location favors businesses that attract I-4 commuters or have more of regional focus.

Figure 2: Three and Five Mile Market Assessment Areas



Source: East Central Florida Regional Planning Council, 2013

2. Infogroup is the largest provider of business information in the United States. The database includes information on more than 30 million businesses nationwide including address, business type, number of employees, and other information.

A more detailed description of the study area and the market assessment zones is provided in the next sections. The existing conditions analysis focuses on the characteristics of the parcels in the study area. The market assessment will provide a comprehensive profile of the industries located within the region.

Existing Conditions Analysis

This section of the project identifies the West Lake Helen study area’s existing resources and characteristics based on data provided by the Volusia County Property Appraiser. This analysis also includes several maps of the study area produced using Geographic Information System (GIS) data.

The West Lake Helen study area encompasses a total of 195 parcels (163 within the City of Lake Helen and 32 parcels within unincorporated Volusia County). The I-4 interchange is the primary jurisdictional divider within this corridor, as most of the parcels on the east side of the highway are incorporated within the City of Lake Helen. Similarly, most parcels on the west side of Interstate-4 are located within unincorporated Volusia County. The study area includes a total of 471.57 acres of land.

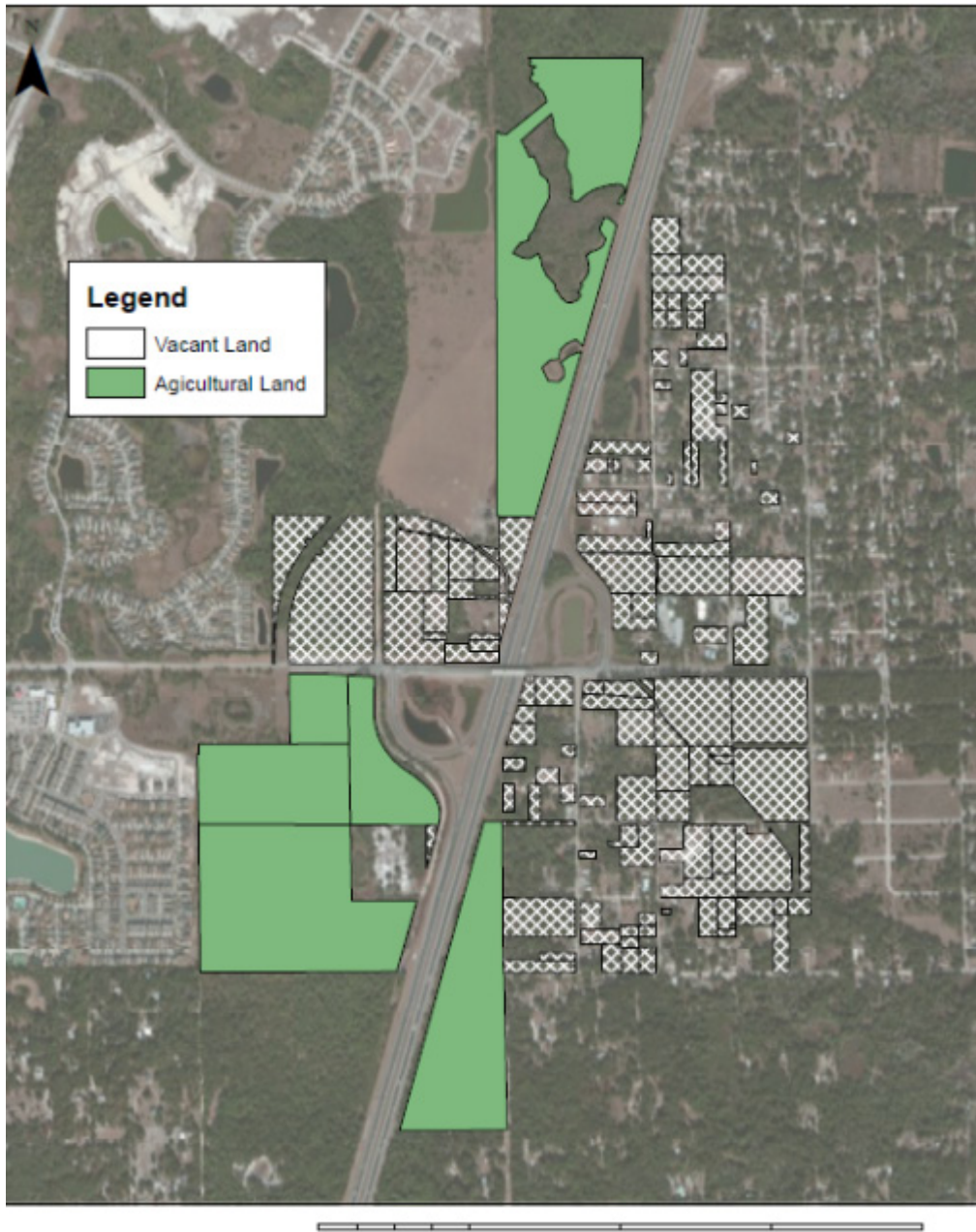
Figure 3: Existing Land Uses within the West Lake Helen Study Area

DOR	Description	# of Parcels	Total Acreage
00	Residential Vacant Land	83	95.0
01	Residential Single Family	25	21.4
02	Residential Mobile Homes	3	0.8
07	M/F/R Communities	4	16.6
10	Commercial Vacant Land	32	82.0
12	Stores-Office-SFR	14	18.4
17	1 Story Office	1	1.8
23	Financial Institutions	1	2.2
32	Enclosed Theaters & Auditoriums	1	1.9
40	Industrial Vacant Land	3	8.6
41	Light Manufacturing	2	3.2
48	Warehousing	2	4.8
53	Agricultural Cropland	2	20.1
55	Agricultural Timberland #2	3	101.3
61	Agricultural Pastures, Improved	1	60.7
70	Institutional Vacant Land	2	1.0
71	Institutional, Churches	2	0.7
76	Mortuaries & Cemeteries	1	9.7
86	Other County	1	1.2
87	Other State	4	16.3
89	Other Municipal	4	3.1
96	Sewage, Solid Waste, Borrow Pit	6	1.2

Source: Volusia County Property Appraiser, 2013

Figure 3 shows the existing land uses within the West Lake Helen Study Area by Department of Revenue (DOR) codes. The four most prevalent DOR codes within the study area are Residential Vacant Land, Commercial Vacant Land, Residential Single Family, and Store-Office-Single Family Residential. A high concentration of Commercial Vacant Land is located along Main Street (County Road 4116), while most occupied dwellings are located to the south of County Road 4116 and are generally a mixture of residential, office, and commercial uses.

Figure 4: Agricultural and Vacant Land within the West Lake Helen Study Area



Source: Volusia County Property Appraiser, 2013

About 40 percent of the land within the study area is vacant. Most of these parcels are concentrated toward the eastern side (or incorporated section) of the study area (Figure 4). In addition to the vacant land, there are close to 200 acres of agricultural land within the study area. Most of these properties are located in unincorporated Volusia County and include timber, pastures, and cropland. These agricultural parcels are the largest properties in the study area.

Ownership type is an important consideration when working with vacant land. In the case of the West Side study area, a large amount of acreage is owned by a small number of people and corporations. Moreover, the parcels tend to adjoin each other rather than be scattered throughout the area.

This is a positive because it can allow for better planning of the area. Figure 5 shows the largest owners of vacant and agricultural lands within the study area. The largest single parcel is owned by Howarth & Stewart and is located in the northern part of the study area within the City of Lake Helen. Dandhai Investments owns three adjoining parcels on the southwest side of the study area that account for more than 25 acres. The economic strategic plan provides a more complete overview of all the vacant parcels within the West Lake Helen Study Area.

Figure 5: Largest Property Owners within the Study Area

Property Owner Name	Total Acreage
Ford Frank A Etals	80.3
Howarth & Stewart	60.7
Dandhai Investments Inc.	25.3
Ford F A Jr Trustee	22.0
Ford F M & Berenice A	21.4
Stewart Tom B III	20.1
Richard E Van Wormer	11.4
Able Income Fund LLC	10.9
Andrew Ryan TR	7.0
Stephenson Loretta P.	5.5

Source: Volusia County Property Appraiser, 2013

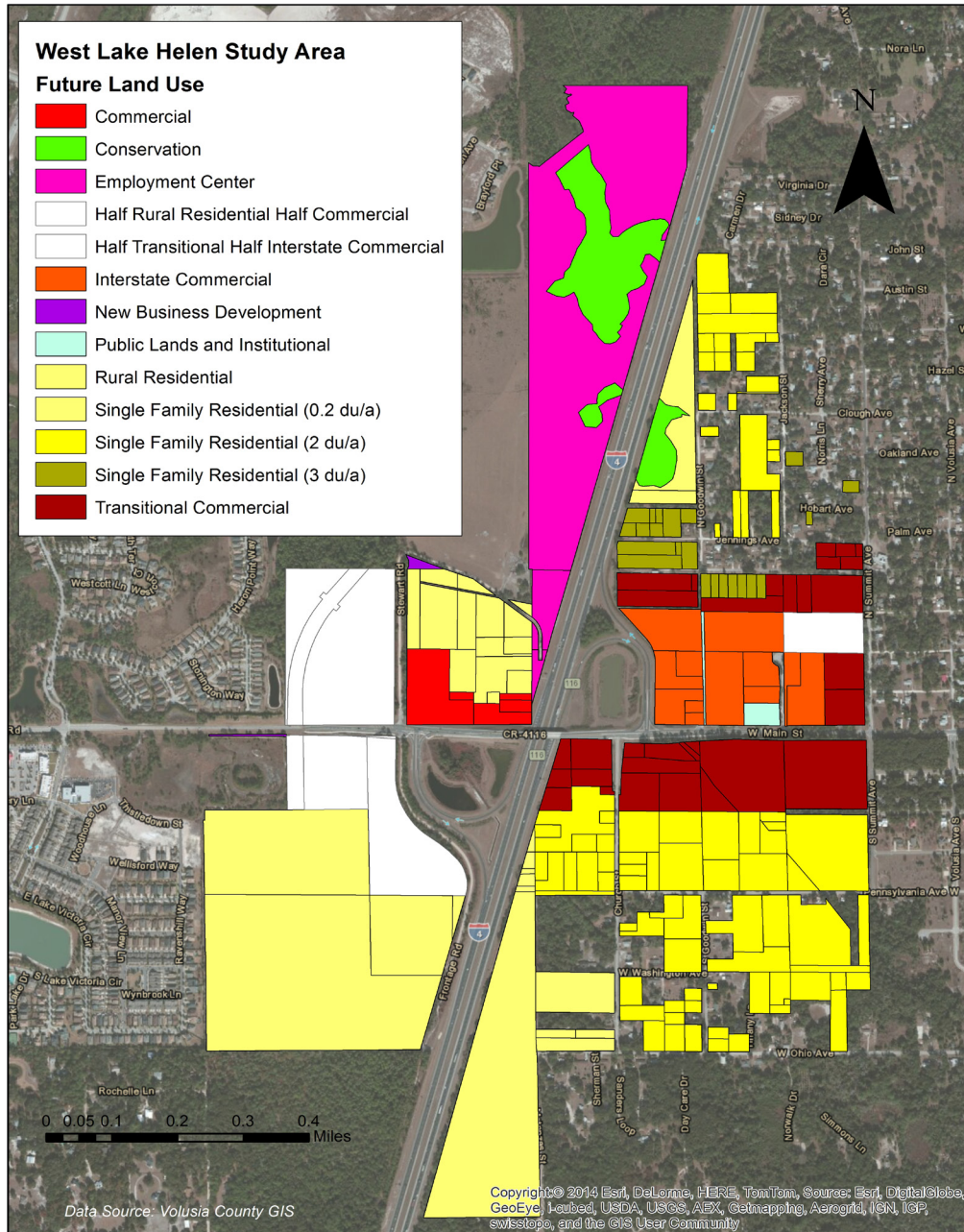
Existing Future Land Use Entitlements

Future Land Use designations set land use criteria for long term planning purposes. The most common Future Land Use designation within the study area is Rural Residential with 131 acres of land. Most of these properties are located in the vicinity of I-4. Therefore, this might not be the best use for these properties, the majority of which are vacant. The second largest future land use designation is Single-Family Residential (2 dwelling units per acre). Most of these parcels are located east of the I-4 interchange. There are 83 parcels with this Future Land Use designation that comprise about 94 acres of land. The third largest future land use designation is Transitional Commercial, which comprises about 49 acres of land. These properties are located along County Road 4116 and West New York Avenue. Figure 6 shows the future land use designations for the entire study area.

Regional Market Assessment

The purpose of the market assessment is to identify the main industries in the region. For this economic analysis, the ECFRPC categorized industries according to three variables: the region's economic specialization, its business concentration, and targeted industries. Economic specialization refers to the industries that make the region economically competitive at the national level. Lake Helen could target these types of businesses to complement the strengths of the region. Business concentration refers to the share of establishments by industry in the region. For this project, business concentration will help to determine if there are any gaps in services in the region. Lake Helen could then try to attract these types of businesses to fit the needs of the region. Finally, targeted industries are those promoted by the county's and state's economic development agencies to diversify the local economy. The following discussion will focus on industry specialization and concentration. Targeted industries will be discussed in a later section.

Figure 6: West Lake Helen Study Area Future Land Use Map



Source: East Central Florida Regional Planning Council, 2013

Economic regions tend to specialize in providing the goods and services where they are the most efficient, which are then exported outside the region. The local export industries, also referred to as basic or traded, drive the local economy because they generate an inflow of income. This income is used to sustain the non-basic industries that deliver products and services mainly used for local consumption. For economic development purposes, it is important to know the difference in the impacts that traded and non-traded industries have on the local economy. Regional growth is driven by traded industries as they have a higher multiplier effect on jobs and investment because they bring money from outside the region. On the other hand, the economic effect of non-traded industries is smaller. Rather than generating additional demand, firms within a non-basic sector compete against each other for a piece of the local market.

Figure 7: Comparison of LQs for Selected Industries

NAICS Subsectors	Total Employment	Location Quotient
111422 Floriculture Production	1,049	19.14
711212 Racetracks	739	18.09
336612 Boat Building	580	16.83
813990 Other Similar Organizations	1,163	9.69
314999 All Other Miscellaneous Textile Product Mills	328	8.66
541860 Direct Mail Advertising	378	6.6
531190 Lessors Of Other Real Estate Property	231	4.93
333999 Miscellaneous General Purpose Machinery Mfg.	216	4.7
611512 Flight Training	88	4.63
111310 Orange Groves	33	4.43

Source: BLS Location Quotient Calculator, 2013

To identify traded industries within the region, location quotients (LQ) are utilized. This is the ratio that compares the percentage of employment in a particular industry in a local economy to the percentage of employment in the same industry in a reference economy (McLean and Voytek, 2000). For the purpose of this analysis Volusia County was used as the local economy, and the United States served as the reference economy. The LQ measure is popular because it is easy to understand. A ratio higher than 1 implies that there is an excess capacity in that particular industry. This means that the local economy probably exports these goods and services to other jurisdictions.

Figure 7 depicts the industries with the highest LQs in Volusia County. Volusia County shows high specialization in agricultural industries (nurseries and orange groves), several types of manufacturing, and industries related to tourism services. A more detailed table is provided in Appendix 1, and there will be additional discussion on this topic in the economic strategic plan. The Location Quotient is a good measure for identifying economic strengths. However, the information required to complete this type of analysis is not available for smaller jurisdictions. Therefore, staff prepared two market areas to assess which industries comprise the region’s industrial structure.

According to Infogroup, there are 615 businesses within three miles of the City of Lake Helen. The five mile buffer contains over 4,000 establishments. Figure 8 shows a comparison of the two buffer areas by Industry NAICS Codes. There is a high concentration of establishments within the Retail Trade (44-45), Construction (23), Other Services categories. This shows that the economy in the vicinity of Lake Helen is dominated by establishments within non-basic industries including single-family housing contractors, churches, and landscaping services.

Figure 8: Concentration of Industries in the Market Assessment Areas

Industry (2 Digit NAICS Code)	3 Mile Buffer		5 Mile Buffer	
	Number of Businesses	Percent Total	Number of Businesses	Percent Total
11 Agriculture, Forestry, Fishing, and Hunting	3	0.5	12	0.3
21 Mining, Quarrying, and Oil and Gas Extraction	1	> 1	1	>1
22 Utilities	1	0.2	5	0.1
23 Construction	108	17.6	568	12.6
31-33 Manufacturing	19	3.1	124	2.7
42 Wholesale Trade	29	4.7	151	3.3
44-45 Retail Trade	86	14	715	15.8
48-49 Transportation and Warehousing	11	1.8	79	1.8
51 Information	8	1.3	76	1.7
52 Finance and Insurance	32	5.2	236	5.2
53 Real Estate and Rental and Leasing	26	4.2	169	3.7
54 Professional, Scientific, and Technical Services	29	4.7	395	8.8
55 Management of Companies and Enterprises	1	0.2	5	0.1
56 Administrative and Support and Waste Management and Remediation Services	39	6.3	262	5.8
61 Educational Services	14	2.3	89	2
62 Health Care and Social Assistance	36	5.9	558	12.4
71 Arts, Entertainment, and Recreation	17	2.8	66	1.5
72 Accommodation and Food Services	29	4.7	236	5.2
81 Other Services (except Public Administration)	91	14.8	526	11.7
92 Public Administration	18	2.9	187	4.1
99 Unclassified Establishments	18	2.9	53	1.2

Source: Infogroup, 2013

Based on the economic concentration analysis, there may be opportunities for Lake Helen in the Accommodation and Food Services, Manufacturing, Educational Services, and Transportation and Warehousing industries. The low concentration of establishments within these industries suggests that there might be a need to meet local demand with closer proximity to services. A more detailed outlook for these sectors is provided in the strategic plan portion of the document.

4. The North American Industry Classification System (NAICS) is a coding standard that classifies firms based on their production processes. The classification system has 20 industrial sectors, and has a five-six digit level of complexity. For example the Construction industry is classified as NAICS 23. For more specific industry analysis you add another digit to the sequence: NAICS 236 Construction of Buildings, NAICS 2362 Nonresidential Building Construction, NAICS 23621 Industrial Building Construction.

Interchange Vehicle Traffic

The Lake Helen interchange serves as the next to last exit eastbound for travelers wishing to connect with Interstate 95. This locational advantage provides an important economic development opportunity for the study area as these motorists may have a need for services such as gas, food, and lodging. The Florida Department of Transportation (FDOT) collects annual average daily traffic counts data for all road segments of Florida's State Highway System.

Figure 9: 2013 I-4 Annual Average Daily Traffic Counts near the Lake Helen Interchange

Travel Description	Traffic	
	All	Trucks
S.R 472 to Orange Camp Road	77,500	8,603
Orange Camp Road to S.R 44	55,500	6,494

Source: FDOT Florida Traffic Online (2012)

Figure 9 depicts the average daily traffic counts for the segments near the Lake Helen interchange. For data collection purposes, FDOT divides this part of I-4 into two road segments: S.R 472 to Orange Camp Road (south of the interchange) and Orange Camp Road to S.R. 44 (north of the interchange). Based on this information, more than 50,000 vehicles pass through Lake Helen each day. Moreover, approximately 11% of these commuters are truckers, some of which might be traveling long distances. The West Lake Helen Study Area could become a hub of services for these travelers by providing them with services such as restaurants, hotels, and other amenities. These opportunities will be discussed in more detail in the next phase of the study.

Economic Strategic Plan

Based on the existing conditions analysis, it has been determined that there is plenty of vacant land available within the study area. Moreover, these parcels are close to each other which should help to facilitate their future development. However, the City of Lake Helen might need to change the entitlements for some of the vacant parcels to make this process easier. The preliminary economic analysis showed that Volusia County is competitive in several areas including manufacturing, tourism services, and agriculture. The City of Lake Helen could try to attract businesses in these industries. Moreover, there may be a need in the region for a variety of services including hotels and warehousing establishments. This is especially true considering the high number of motorists that pass through Lake Helen each day. The Economic Strategic Plan provides a more comprehensive look on these industries and determines their appropriateness based on the type of properties available.

The West Lake Helen Economic Strategic Plan provides a series of recommendations for the development of the Interstate 4 Interchange area near the City of Lake Helen based on the type of industry agglomerations identified in the market assessment areas, local product consumption patterns, commuter travel patterns, and land use characteristics and entitlements of the vacant properties in West Lake Helen.

4. There is a difference of 22,000 motorists between the two road segments. The traffic count data does not specify whether commuters are traveling eastbound or westbound on I-4, but the higher number of commuters on the S.R 472-Orange Camp Rd. segment might be explained by people traveling west to the Orlando area for work.

Industry Agglomerations

Attracting traded or export industries is a key component of any economic development strategy because these industries have a high multiplier effect on the local economy. Part of this positive effect is due to the principle of business agglomeration or the colocation of similar businesses in one area. Firms tend to agglomerate because they benefit from close proximity to each other. Moreover, an agglomeration can include producers, suppliers, and other organizations that benefit from this concentration.

To determine if there are any business agglomerations near Lake Helen, the ECFRPC created a five-mile buffer around the study area. There are more than 4,000 establishments within this market assessment area. Based on the strength of Volusia County's location quotients and a study of local businesses, the ECFRPC found there were four significant agglomerations, which are described below. A complete list of establishments by NAICS code is provided in Appendix I.

- **Construction Trades:** This agglomeration is comprised of 612 businesses. It includes a variety of specialty trade contractors that are usually subcontracted by larger companies to perform specific building activities such as site preparation, carpentry, roofing, and painting.
- **Health Care and Medical Services:** There are 218 businesses within this agglomeration. These include the offices of physicians and other health practitioners, medical laboratories, and healthcare facilities. The County's strength in medical services may be due to the large number of retirees living in the area (see the Retirement and Senior Services agglomeration).
- **Manufacturing:** There are close to 100 manufacturing companies within the market assessment area. The area shows particular strengths in the fabrication of electronic components, aircraft and other vehicle parts and accessories, and parachutes.
- **Retirement and Senior Services:** This agglomeration includes companies that provide residential and personal care services for the elderly, including assisted living and on-site nursing care facilities, vocational rehabilitation, and home healthcare service agencies. There are 63 establishments within this agglomeration.

These four agglomerations offer several advantages that the City of Lake Helen could consider to develop the Interchange area. The industries within these agglomerations are already present and competitive in the area. However, in order to have a comprehensive discussion regarding these development possibilities, the City should also look at targeted industries.

Targeted Industries

Targeted industries are those that are pursued by the state and regional economic development agencies to diversify the economy and create higher paying jobs in the region. Because they complement the economic competitiveness of the region, every economic development plan must consider these industries. Moreover, the City of Lake Helen may receive assistance from these economic development entities when recruiting businesses within these industries. These targeted industries encompass a variety of businesses (see Appendix III for more information).

Based on ECFRPC’s research, Enterprise Florida and Team Volusia are focused on attracting 12 industries.

- Advanced Manufacturing
- Aviation/Aerospace
- Financial/Professional Services
- Cleantech
- Digital Media
- Regional Headquarters
- Logistics and Distribution
- Information Technology
- Modeling Simulation and Training
- Life Sciences

Attracting businesses within any of these targeted industries will be positive for the City of Lake Helen. The City should work closely with regional and state partners to retain current companies and grow these sectors of the local economy.

Retail and Services Gap Assessment

The ECFRPC believes that traded industries are the best uses to be located in the West Lake Helen Study Area. However, it is also important to consider regional demand for goods and services to provide a more complete overview of uses. For this analysis, the ECFRPC compared the personal consumption patterns in the market assessment areas to the inventory of establishments found within these two areas. It is important to note that the intent of this analysis is not to calculate square footage absorption rates, but to identify uses that are not currently present. The City of Lake Helen can then use this information to determine if it would like to attract these types of businesses to the study area.

According to Nielsen Claritas, the residents of the market assessment areas spend most of their money on transportation, healthcare, and groceries (Figure 10). People within these areas spend about 15 percent of their income on transportation expenses. This is not surprising as many of the area residents are probably commuting daily to the Orlando area for work. On the other hand, the healthcare expenses could be due to the area’s demographics. The third largest category is groceries followed by rent or mortgage and clothes. Overall, there is not a significant difference in the expenditure patterns of the two market assessment areas.

Figure 10: Top Consumer Expenditure Categories in 2013

Consumption Categories	Total Expenditures	
	3 Mile Radius	5 Mile Radius
Transportation	\$38,729,736	\$178,058,863
Health Care	\$31,087,943	\$150,509,706
Food At Home	\$27,958,949	\$144,754,681
Housing Expenses	\$20,933,393	\$105,933,498
Total Apparel	\$17,901,351	\$86,701,077

Source: Nelson Claritas, 2013

The previous data helps to determine the general demand for services. To determine the supply of establishments, the ECFRPC examined establishment data provided by Infogroup. Since most people shop for goods and services close to their homes, the table only shows the businesses within the three-mile assessment area. The Healthcare and Food at Home expenditure categories showed the highest service gaps. There are several healthcare practitioner offices in the area, most of which are located in the Victoria Park Village Center; however, most of these are general medicine doctors. The area does not contain any specialists. It also does not have any medical or diagnostic laboratories. There are several establishments in the area that sell food including convenience stores, a produce market, a retail bakery, and two specialty food stores. However, the only supermarket in the area is very small (about 2,500 square feet). Lake Helen and nearby areas will benefit from having a larger supermarket where residents can purchase all of their groceries in proximity to their homes. The ECFRPC will consider some of these uses when making development recommendations for West Lake Helen.

Figure 11: Business Analysis for Selected Expenditure Categories in Three-Mile Assessment Area

Expenditure Category	Number of Establishments	Current Uses	Complementary Uses not Found
Transportation	7	Gas stations (with/without Convenience Stores)	None
Healthcare	18	Doctor Offices, Dentists, Hospital Clinics and other Miscellaneous Ambulatory Health Services	Other Health Practitioners, Medical Laboratories and Diagnostic Centers
Food at Home	6	Supermarkets and Gas Stations with Convenience Stores	Large Super Market
Apparel	10	Women, Children, Other Clothing Stores, and Used Merchandise Retailers	Men, Family, Clothing Stores, Accessories, and Shoe Stores

Source: InfoGroup, ECFRPC

Commuter Expenditure Patterns

Based on the information provided by the Florida Department of Transportation (FDOT), more than 50,000 vehicles pass through Lake Helen daily on Interstate 4. The West Lake Helen area could provide some of the services required by those travelers. Since there are no major employment centers close to this area, the ECFRPC is assuming that most of these commuters are trying to travel between the large metro areas of Orlando, Daytona Beach, and Jacksonville. About 11 percent of these commuters travel by truck. There are several uses that this type of commuter could support including lodging facilities, restaurants, and gas stations. Some of these uses should be included within the West Lake Helen area.

Industry and Use Recommendations

The main objective of the West Lake Helen Strategic Plan is to recommend industries that could locate within the study area. These recommended uses are divided based on the type of service they provide. Traded or export industries are those that serve state, national, and international markets. These industries complement the agglomerations found in Volusia County. Non-traded industries are those that serve the immediate market area and are based on the retail gap analysis prepared by the ECFRPC. They are heavily dependent on the local market population to be successful. Finally, the commuter businesses are those that serve people traveling on Interstate 4.

The traded industries recommended for the West Lake Helen Study Area are manufacturing, logistics and distribution, and construction and building services, which are described in more detail below.

Manufacturing

Manufacturing has seen a renaissance at the national level and is one of the industries leading the country out of the national economic recession. While this industry comprises less than five percent of Florida's total output, it represents 85 percent of the state's exports (National Association of Manufacturers, 2010). Because of its positive economic impact, state officials have taken several steps to make manufacturing an important part of the state's economic recovery. For example, last year the governor signed H.B 7007, which provides a temporary sales and use tax exemption for certain manufacturing equipment. The five-mile market assessment area includes several companies that produce electronic components, aircraft parts, and other products. Most of the processes are performed inside an enclosed building, and thus, they would not disturb the quality of life of Lake Helen residents.

Logistics and Distribution

This sector includes establishments within the wholesale trade, transportation, and logistic industries. Logistics and Distribution is expected to grow in the next decades due to the increase in international trade and internet commerce. For example, the rising popularity of internet retailers like Amazon.com has spurred the need for warehouse and distribution centers. The company recently opened a new distribution center in Hillsborough County. Other similar opportunities might open in the future, especially with Central Florida's high population growth. The study area's location near the I-4 interchange between the fast growing cities of Orlando and Jacksonville could give it a locational advantage over other areas.

Construction and Building Trades

This sector includes establishments within the construction and building trades industries. Volusia County has a large number of subcontractor companies that work in the fields of on site preparation, electrical, plumbing, heating, and air-conditioning contractors. These businesses often need office space and storage for their vehicles and materials. Most of their work is performed outside of their offices.

The non-traded industries recommended to locate within the study area are supermarket and grocery stores and healthcare related services. Residents within the three-mile market assessment area spend considerable money for these services but they are not currently available nearby. These uses are subsequently described.

Supermarkets and Other Grocery Stores

These establishments primarily sell a variety of food products such as canned and frozen groceries, fresh fruit and vegetables, and fresh and prepared meats, fish, and poultry. While there are several convenience stores located in the area, there aren't any large supermarkets that sell fresh food. This type of establishment would not only serve the City of Lake Helen, but also the residents of nearby Victoria Park. This area should be able to sustain a store between 15,000-20,000 square feet based on the area's population counts.

Health Care Related Services

There are several primary care physician and dentist offices located in the Victoria Park DRI, but there are not any medical or diagnostic laboratories within the area. These businesses provide services like blood analysis and x-rays, generally on a physician's referral.

Finally, the Lake Helen Interchange area needs to attract businesses that focus on serving I-4 commuters. These services include hotels and motels, gas stations, and restaurants.

Hotels and Motels

This type of establishment provides short-term lodging facilities to travelers. According to Infogroup, there are 19 hotels located within the five-mile assessment area. Most of these properties are between one and three stories, have less than 100 rooms, and contain very few amenities. One parcel within the Victoria Park development is already slated for a 270-room hotel. At the moment, this property does not have road access.

Other Commuter Services

Short distance commuters may benefit from having access to services like gas stations and sit-down chain restaurants. These establishments would also serve local residents.

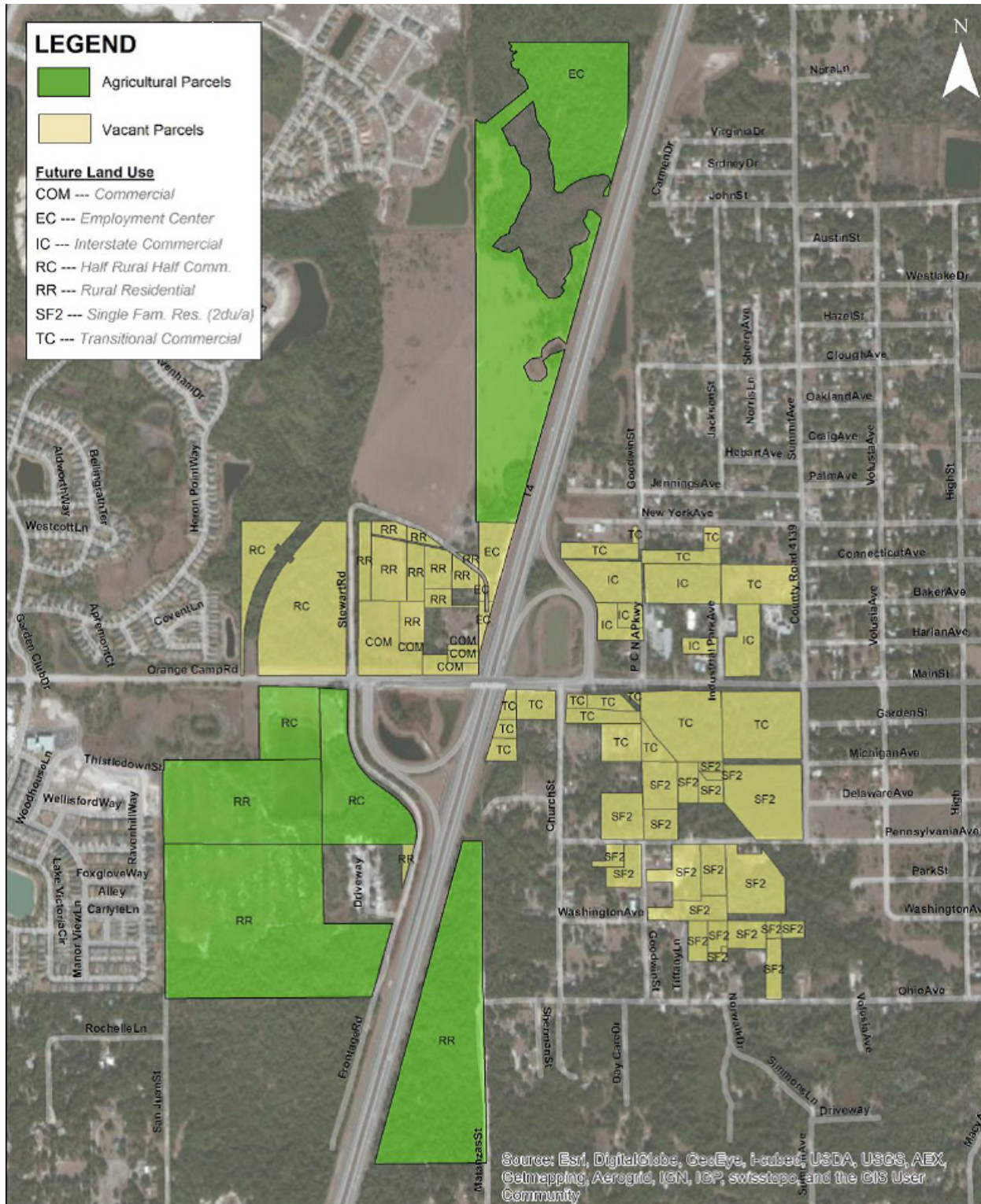
Location of Recommended Uses and Entitlement Changes

This part of the report discusses the prospective locations for the recommended uses within the study area. Originally, the ECFRPC defined the West Lake Helen Study Area by selecting all parcels that were within $\frac{1}{4}$ of a mile from the interchange or already had commercial entitlements in place. This yielded a total of 197 parcels that comprise 472 acres. For this part of the analysis, the ECFRPC looked only at vacant and agricultural parcels. Moreover, the ECFRPC eliminated all standalone parcels and those contiguous properties that were less than ten acres.

Figure 12 depicts the vacant parcels that were used for this analysis with their current entitlements (a larger version of this map is available in Appendix III). Most of the Lake Helen properties have Single Family Residential (SF2) and Transitional Commercial (TC) Future Land Use designations. The properties on the west side of I-4 are in unincorporated Volusia County. Most of them are classified as Rural Commercial or Rural Residential. The entitlements of these parcels will need to change to allow for more intense uses near the interchange area.

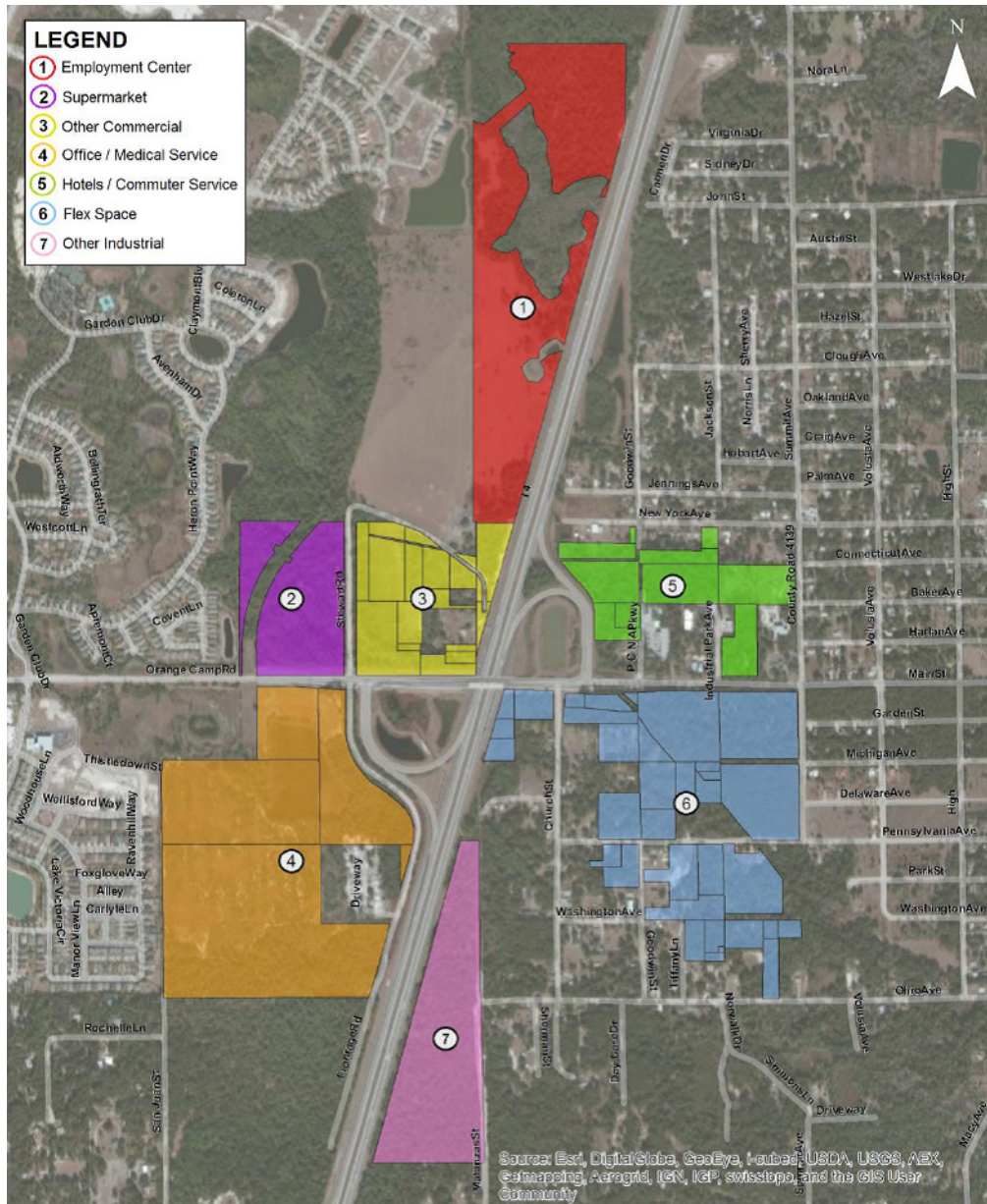
Figure 13 shows the location of the recommended land uses for the study area's vacant parcels. To make it easier to understand, the ECFRPC divided these properties into seven different sub areas. A description of each of the recommended uses for each sub area is provided.

Figure 12: Vacant and Agricultural Parcels with Entitlements



Source: ECFRPC, 2014

Figure 13: West Lake Helen Area Conceptual Map



1. Employment Center: This parcel is part of the Victoria Park Development of Regional Impact (DRI). According to the last DRI report available, the parcel is entitled for a 270 room hotel and 775,011 square feet of office. While the parcel is large (+/- 60 acres), it does not currently front a roadway. The ECFRPC is not recommending any changes to the current entitlements. The City views this parcel as one of the areas with the most potential to attract new development.

2. Supermarket and other Retail Uses: This 21-acre parcel is located in unincorporated Volusia County. It has a future land use designation of Rural Commercial. Its location between Victoria Park and the City of Lake Helen make it a good location for a supermarket and other related commercial uses.

3. Other Commercial: This cluster of parcels could be used for commercial and office uses. The land currently has Commercial and Rural Residential Future Land Use designations. This sub area is comprised of about 26 acres.

4. Office/Medical Service: At some point, this might be a good location for healthcare uses which could include a small medical clinic, doctor offices, and other related services.

5. Hotel/Commuter Services: This cluster of parcels is located within the City of Lake Helen, and is comprised of about 25 acres of land. The parcels have a combination of Interstate Commercial and Transitional Commercial Future Land Use Designations. Their location near I-4 makes them ideal to locate a small hotel, a gas station, and restaurants.

6. Flex Space: This 70-acre cluster of parcels is located within the City of Lake Helen. The term Flex Space is used often to refer to sites that house both office and light industrial uses. This space would contain several warehouse buildings that could be used by small manufacturers, logistic companies, and site contractors. This site will also be surrounded by trees and other landscaping to buffer it from other uses. Figure 14 shows some examples of Flex Space development in the region.

Figure 14: Vacant and Agricultural Parcels with Entitlements



Source: Loop Net

7. Other industrial: This 33-acre parcel is located within the City of Lake Helen. It is relatively close to the Interchange but far from any residential uses. The City could use this site to house general industrial uses that cause noise or odor. It can also be used for goods distribution and storage.

This economic concept plan offers several alternatives for the development of the West Lake Helen Study interchange area. The next section discusses some funding mechanisms that could be used to finance some of these developments.

Funding Mechanisms and Strategies

Due to budget constraints at the federal level, local governments will likely need to find ways to finance new infrastructure with local dollars. In the case of West Lake Helen, most of the properties within the study area are currently vacant and will require infrastructure improvements to allow for development. Common sources of funding at the local level include Special Assessment Districts (SAD) and Community Development Districts (CDD). Both of these mechanisms require approval from the area's property owners.

Community Development Districts (CDD)

Chapter 190 of the Florida Statutes authorized the creation of CDDs, a local special purpose government, as an alternative method for managing and financing the infrastructure required to support residential and non-residential real estate investments. The CDD is permitted to issue municipal bonds to pay for infrastructure including water supply and management, roads, street lighting, and parks. The CDD can then levy special taxes or assessments on properties within the district to pay for these bonds over time.

The State of Florida currently has over 600 CDDs across the state, most of which were approved between 2003 and 2008. Several went into default during the crash of the real estate market because developers were not selling enough homes and did not have enough cash in reserves to cover the bonds.

Local governments do not get involved in CDD processes apart from approving the creation of the district. The CDD is controlled by its own Board of Supervisors elected by the landowners in the district. The Board elects an administrator that is responsible for administering the CDD bonds and operating the community facilities.

Special Assessment District

A Special Assessment District refers to a geographic area that receives a tax that is apportioned to properties to recover the costs of public improvements including roads and utilities. This concept is often used to revitalize economically distressed areas or to pay for additional services when there are no other sources of funding. The basic principle is that government must regain the costs of new infrastructure improvements if these investments increase the adjacent property values. This assessment is based on the value of the properties within the district and is usually collected with property taxes. To establish a Special Assessment District within the TOD, the City of Lake Helen will require the approval of the local property owners.

Strategies for the Implementation of the West Lake Helen Plan

This section provides some recommendations to the City of Lake Helen based on the findings of the Existing Conditions Analysis report and the Economic Strategic Plan. To make the vision of West Lake Helen a reality, the City needs to concentrate on addressing entitlement and infrastructure challenges.

Strategy 1: Create an economic development program for the City of Lake Helen

The ECFRPC recommends City officials to develop a list of projects to help implement the recommendations of the West Lake Helen Strategic Plan. These tasks and assignments could be updated by the City Commission annually depending upon budget concerns and other priorities.

Strategy 2: Focus on targeting export businesses that complement Lake Helen's strengths

City officials should partner with other economic development agencies like the Volusia County Department of Economic Development and Enterprise Florida, and private organizations like the DeLand Chamber of Commerce and the Volusia Manufacturers Association, to attract more businesses to the City. The City should also consider becoming a member of the Team Volusia Economic Development Corporation to get more attention from site selectors.

Strategy 3: Change the Future Land Use designation of residential parcels within the study area

There are 22 vacant parcels within the study area that have a Single Family Residential (2 du/acre) Future Land Use designation. These properties need to have their future land use designation changed to allow commercial and industrial uses. At some point, the city should convene these property owners to discuss these land use changes.

Strategy 4: Develop an annexation plan for properties east of the I-4 Interchange

As explained previously in this report, the properties east of the interchange are located within unincorporated Volusia County. The ECFRPC recommends that Lake Helen officials meet with the owners of these properties to see if they will be interested in annexation. These parcels currently have Rural Residential and Rural Commercial Future Land Use designations. Higher entitlements such as the ones envisioned in this strategic plan could help persuade these property owners to annex their properties into the City.

Strategy 5: Add an industrial future land use category to Lake Helen's Comprehensive Plan

The future of West Lake Helen is dependent on having regulations that allow for the best uses within the interchange area. Based on the ECFRPC's analysis, some of these uses include manufacturing, wholesale trade and storage, and construction trades. Most Central Florida jurisdictions only allow these types of uses on properties with an industrial designation. This classification currently does not exist in the City of Lake Helen Land Development Code. The City should consider amending the City's Comprehensive Plan to allow create an industrial Future Land Use designation and allow these types of uses within Lake Helen. The City will also need to develop additional land development regulations to buffer residents from these industrial uses such as landscape requirements and setbacks.

Strategy 6: Connect the properties within the West Lake Helen study area to a public sewage system

While most properties within the City of Lake Helen have access to water, they are all served by septic tanks. Florida Department of Health regulations require all commercial and industrial uses to have access to sewer. The City of Lake Helen should have a meeting with the cities of DeLand and Deltona to discuss the costs of extending sewer lines to the properties within the study area. Without having access to sewer, many commercial and industrial uses would not be able to locate in the area.

Strategy 7: Promote Lake Helen as a tourist destination

The City of Lake Helen has several amenities that make it a unique place to live. The community boasts well-preserved Victorian architecture buildings, numerous parks and recreational facilities, and a lush tree landscape. Lake Helen's proximity to interesting tourism destinations like DeLand and Cassadaga, and the high number of talented artists living within the City are also important assets that make it a unique place to visit. The ECFRPC recommends that Lake Helen pursue a strategy to market itself as a cultural destination. The City should continue to host festivals and events to attract more visitors to the City. The City should also partner with regional and state agencies such as the West Volusia Tourism Advertising Authority and Visit Florida to market Lake Helen to potential visitors. For example, Visit Florida has several programs that could help provide free marketing for the City using a variety of media platforms. Many of these services would not have a cost for Lake Helen.

Appendix I

Highest Location Quotients for Volusia County

NAICS Subsectors	Total Employment	Location Quotient
NAICS 111422 Floriculture production	1,049	19.14
NAICS 711212 Racetracks	739	18.09
NAICS 336612 Boat building	580	16.83
NAICS 813990 Other similar organizations	1,163	9.69
NAICS 314999 All other miscellaneous textile product mills	328	8.66
NAICS 541860 Direct mail advertising	378	6.6
NAICS 531190 Lessors of other real estate property	231	4.93
NAICS 333999 Miscellaneous general purpose machinery mfg.	216	4.7
NAICS 611512 Flight training	88	4.63
NAICS 111310 Orange groves	33	4.43
NAICS 532292 Recreational goods rental	54	4.43
NAICS 441228 Motorcycle, ATV, and other vehicle dealers	349	4.34
NAICS 339112 Surgical and medical instrument manufacturing	613	4.33
NAICS 54135 Building inspection services	90	4.33
NAICS 561591 Convention and visitors bureaus	39	4.11
NAICS 337920 Blind and shade manufacturing	57	3.93
NAICS 238161 Residential roofing contractors	335	3.85
NAICS 713930 Marinas	139	3.81
NAICS 111421 Nursery and tree production	326	3.58
NAICS 327390 Other concrete product manufacturing	188	3.41
NAICS 238191 Other residential exterior contractors	47	3.34
NAICS 561710 Exterminating and pest control services	375	3.27
NAICS 711219 Other spectator sports	79	3.09
NAICS 336991 Motorcycle, bicycle, and parts manufacturing	40	2.93
NAICS 23839 Other building finishing contractors	203	2.79
NAICS 332999 Miscellaneous fabricated metal product mfg.	242	2.75
NAICS 611310 Colleges and universities	3,760	2.73
NAICS 561510 Travel agencies	264	2.72
NAICS 3256 Soap, cleaning compound, and toiletry mfg.	325	2.7
NAICS 561520 Tour operators	80	2.68
NAICS 621512 Diagnostic imaging centers	210	2.62
NAICS 532411 Transportation equipment rental and leasing	21	2.51
NAICS 621511 Medical laboratories	488	2.48
NAICS 623312 Assisted living facilities for the elderly	1,061	2.46

Source: Bureau of Labor Statistics Location Quotient Calculator, 2013

Highest Location Quotients for Volusia County cont.

NAICS Subsectors	Total Employment	Location Quotient
NAICS 339999 All other miscellaneous manufacturing	146	2.43
NAICS 238341 Residential tile and terrazzo contractors	77	2.39
NAICS 713910 Golf courses and country clubs	949	2.37
NAICS 448190 Other clothing stores	325	2.35
NAICS 238322 Nonresidential painting contractors	210	2.32
NAICS 531210 Offices of real estate agents and brokers	738	2.32
NAICS 454390 Other direct selling establishments	145	2.28
NAICS 238991 All other residential trade contractors	310	2.27
NAICS 238221 Residential plumbing and HVAC contractors	960	2.16
NAICS 623990 Other residential care facilities	394	2.11
NAICS 236117 New housing for-sale builders	55	2.1
NAICS 623311 Continuing care retirement communities	1,038	2.09
NAICS 443141 Household appliance stores	143	2.07
NAICS 238311 Residential drywall contractors	190	2.05
NAICS 441222 Boat dealers	72	1.97
NAICS 238141 Residential masonry contractors	139	1.94
NAICS 453991 Tobacco stores	62	1.94
NAICS 323113 Commercial screen printing	146	1.91
NAICS 722410 Drinking places, alcoholic beverages	781	1.91
NAICS 531130 Miniwarehouse and self-storage unit operators	99	1.89
NAICS 445120 Convenience stores	307	1.82
NAICS 4529 Other general merchandise stores	3,332	1.82
NAICS 531311 Residential property managers	748	1.82
NAICS 6115 Technical and trade schools	270	1.82
NAICS 448140 Family clothing stores	944	1.79
NAICS 453998 Store retailers not specified elsewhere	240	1.74
NAICS 238321 Residential painting contractors	180	1.73
NAICS 339113 Surgical appliance and supplies manufacturing	201	1.73
NAICS 722511 Full-service restaurants	9,380	1.73
NAICS 445220 Fish and seafood markets	27	1.72
NAICS 711211 Sports teams and clubs	139	1.7
NAICS 238291 Other residential equipment contractors	32	1.69
NAICS 238351 Residential finish carpentry contractors	155	1.66
NAICS 238152 Nonresidential glass and glazing contractors	59	1.62

Source: Bureau of Labor Statistics Location Quotient Calculator, 2013

Highest Location Quotients for Volusia Count cont.

NAICS Subsectors	Total Employment	Location Quotient
NAICS 339999 All other miscellaneous manufacturing	146	2.43
NAICS 238341 Residential tile and terrazzo contractors	77	2.39
NAICS 713910 Golf courses and country clubs	949	2.37
NAICS 448190 Other clothing stores	325	2.35
NAICS 238322 Nonresidential painting contractors	210	2.32
NAICS 531210 Offices of real estate agents and brokers	738	2.32
NAICS 454390 Other direct selling establishments	145	2.28
NAICS 238991 All other residential trade contractors	310	2.27
NAICS 238221 Residential plumbing and HVAC contractors	960	2.16
NAICS 623990 Other residential care facilities	394	2.11
NAICS 236117 New housing for-sale builders	55	2.1
NAICS 623311 Continuing care retirement communities	1,038	2.09
NAICS 443141 Household appliance stores	143	2.07
NAICS 238311 Residential drywall contractors	190	2.05
NAICS 441222 Boat dealers	72	1.97
NAICS 238141 Residential masonry contractors	139	1.94
NAICS 453991 Tobacco stores	62	1.94
NAICS 323113 Commercial screen printing	146	1.91
NAICS 722410 Drinking places, alcoholic beverages	781	1.91
NAICS 531130 Miniwarehouse and self-storage unit operators	99	1.89
NAICS 445120 Convenience stores	307	1.82
NAICS 4529 Other general merchandise stores	3,332	1.82
NAICS 531311 Residential property managers	748	1.82
NAICS 6115 Technical and trade schools	270	1.82
NAICS 448140 Family clothing stores	944	1.79
NAICS 453998 Store retailers not specified elsewhere	240	1.74
NAICS 238321 Residential painting contractors	180	1.73
NAICS 339113 Surgical appliance and supplies manufacturing	201	1.73
NAICS 722511 Full-service restaurants	9,380	1.73
NAICS 445220 Fish and seafood markets	27	1.72
NAICS 711211 Sports teams and clubs	139	1.7
NAICS 238291 Other residential equipment contractors	32	1.69
NAICS 238351 Residential finish carpentry contractors	155	1.66
NAICS 238152 Nonresidential glass and glazing contractors	59	1.62

Source: Bureau of Labor Statistics Location Quotient Calculator, 2013

Highest Location Quotients for Volusia County cont.

NAICS Subsectors	Total Employment	Location Quotient
NAICS 238111 Residential poured foundation contractors	101	1.24
NAICS 443142 Electronics stores	676	1.22
NAICS 444130 Hardware stores	200	1.22
NAICS 7131 Amusement parks and arcades	248	1.22
NAICS 444190 Other building material dealers	287	1.2
NAICS 453910 Pet and pet supplies stores	143	1.19
NAICS 23812 Steel and precast concrete contractors	93	1.18
NAICS 23813 Framing contractors	69	1.15
NAICS 451211 Book stores	134	1.14
NAICS 238331 Residential flooring contractors	46	1.11
NAICS 531320 Offices of real estate appraisers	46	1.11
NAICS 446130 Optical goods stores	86	1.1
NAICS 722513 Limited-service restaurants	4,531	1.09
NAICS 445230 Fruit and vegetable markets	49	1.08
NAICS 33324 Industrial machinery manufacturing	131	1.07
NAICS 611691 Exam preparation and tutoring	116	1.06
NAICS 452112 Discount department stores	1,226	1.04
NAICS 237130 Power and communication system construction	170	1.03
NAICS 238112 Nonresidential poured foundation contractors	88	1.02
NAICS 446191 Food, health, supplement stores	52	1.02
NAICS 713990 All other amusement and recreation industries	155	1.02
NAICS 454310 Fuel dealers	94	1.01

Source: Bureau of Labor Statistics Location Quotient Calculator, 2013

Appendix II:

Five Mile Assessment Area Agglomerations

Construction Trades

Industry by NAICS Code	Location Quotient	Number of Establishments
236115 New Single-Family General Contractors	1.3	104
236117 New Housing For-Sale Builders	1.2	1
236118 Residential Remodelers	.94	1
236210 Industrial Building Construction	.18	1
236220 Commercial Building Construction	.58	39
238110 Poured Concrete Foundation and Structure Contractors	1.2	16
238140 Masonry Contractors	2.3	7
238150 Glass and Glazing Contractors	1.6	3
238161 Roofing Contractors	4.3	11
238190 Other Foundation/Structure and Building Contractors	1.2	6
238211 Electrical Contractor and Other Wiring and Installation Contractors	1.8	130
238220 Residential Heating and Air Conditioning Contractors	2.2	64
238311 Drywall and Insulation Contractors	1.3	22
238320 Painting and Wall Covering Contractors	2.9	38
238330 Flooring Contractors	1	8
238340 Tile and Terrazzo Contractors	2.7	12
238350 Finish Carpentry Contractors	1.7	19
238910 Site Preparation Contractors	.67	29

Source: InfoGroup, 2013

Construction Trades cont.

Industry by NAICS Code	Location Quotient	Number of Establishments
238990 All Other Specialty Trade Contractors	2.1	30
327991 Cut Stone & Stone Product Manufacturing	.61	2
331318 Other Aluminum Rolling Drawing & Extruding	Not Disclosable	1
337110 Wood Kitchen Cabinet and Countertop Manufacturing	1.5	6
337920 Blind and Shade Manufacturing	3.9	1
423310 Lumber, Plywood Merchant Wholesalers	1.2	1
423320 Brick, Stone/Related Materials Merchant Wholesalers	1.2	3
423310 Lumber, Plywood Merchant Wholesalers	1.2	1
423990 Other Construction Material Merchant Wholesalers	1.2	3
444110 Home Centers	Not Disclosable	3
444120 Paint and Wall Paper Stores	Not Disclosable	9
444130 Hardware Stores	1.3	6
444190 Other Building Material Dealers	1.2	24
541350 Building Inspection Services	4.3	3

Source: InfoGroup, 2013

Health Care and Medical Services

Industry by NAICS Code	Location Quotient	Number of Establishments
621111 Offices of Physicians, Except Mental Health	1.3	67
621210 Offices of Dentists	.94	40
621310 Offices of Chiropractors	1.4	12
621320 Offices of Optometrists	1.4	7
621320 Offices of Mental Health Practitioners	1.4	4
621340 Offices of Physical/Occupational/Speech Therapists and Audiologists	.94	8
621391 Offices of Podiatrists	1.8	1
621399 Offices of Miscellaneous Health Practitioners	1.5	29
621410 Family Planning Centers	1.0	1
621492 Kidney Dialysis Centers	1.5	2
621493 Freestanding Emergency Medical Centers	1.6	24
621498 All Other Outpatient Centers	2.5	1
621511 Medical Laboratories	2.5	7
621991 Blood and Organ Banks	Not Disclosable	1
621999 All Other Miscellaneous Ambulatory Healthcare Services	.54	6
622210 General Medical and Surgical Hospitals	1.4	22
622110 Psychiatric & Substance Abuse Hospitals	Not Disclosable	5

Source: InfoGroup, 2013

Manufacturing

Industry by NAICS Code	Location Quotient	Number of Establishments
313310 Textile & Fabric Finishing Mills	Not Disclosable	1
314999 All Other Miscellaneous Textile Product Mills	7.2	2
332710 Machine Shops	.61	12
333611 Turbine & Turbine Generator Set Units Manufacturing	Not Disclosable	2
334419 Other Electronic Component Manufacturing	Not Disclosable	3
334511 Search Detection & Navigation Instruments	Not Disclosable	1
339999 All Other Miscellaneous Manufacturing	2.4	1
423120 Motor Vehicle Supplies & New Parts Merchant Wholesalers	0.33	1
423690 Other Electronic Parts & Equipment Merchant Wholesalers	.55	5
423710 Hardware Merchant Wholesalers	.26	2
423830 Industrial Machinery & Equipment Merchant Wholesalers	.18	9
423850 Service Establishment Equip/Supplies Merchant Wholesalers	.59	1
423860 Transportation Equip/Supplies Merchant Wholesalers	1.6	2
423990 Other Miscellaneous Durable Goods Merchant Wholesalers	1.3	1
441222 Boat Dealers	1.8	2
441228 Motorcycle, ATV & All Other Motor Vehicle Dealers	5.0	3
448190 Other Clothing Stores	2.5	1
488119 Other Airport Operations	Not Disclosable	1
488190 Other Support Activities For Air Transportation	Not Disclosable	2

Source: InfoGroup, 2013

Manufacturing cont.

Industry by NAICS Code	Location Quotient	Number of Establishments
541330 Engineering Services	0.28	2
541490 Other Specialized Design Services	0.4	1
713930 Marinas	4.5	4
811310 Commercial Industrial Machinery Repair	0.47	1
999990 Unclassified Establishments	.26	6

Source: InfoGroup, 2013

Retirement and Senior Services

Industry by NAICS Code	Location Quotient	Number of Establishments
621610 Home Healthcare Services	1.5	5
623310 Nursing Care Facilities	2.3	20
623311 Continuing Care Retirement Communities	2.1	31
623312 Assisted Living Facilities for the Elderly	2.5	89
623990 Other Residential Care Facilities	2.1	8
624120 Services for the Elderly/Persons with Disabilities	.39	5
624310 Vocational Rehabilitation Services	1	94
812331 Linen Supply	Not Disclosable	1

Source: InfoGroup, 2013

Appendix III:

Targeted Industries

Targeted Industries	Description	Enterprise Florida	Team Volusia
Manufacturing	Companies specializing in the production of a variety of products	✓	✓
Aviation/Aerospace	Companies specializing in air transportation and its support activities, flight training, aircraft and aircraft parts, and avionics	✓	✓
Cleantech	Companies specializing in clean energy production, advanced materials and products, and environmental remediation	✓	
Digital Media	Companies specializing in software publishing, computer system design, telecommunications, and video game design	✓	
Regional Headquarters	The establishment of facilities that support regional, national or international operations for multinational companies	✓	✓
Logistics and Distribution	Companies specializing in wholesale trade, transportation, and logistics	✓	
Financial/Professional Services	Companies specializing on providing financial and insurance services	✓	
Modeling Simulation and Training	Companies specializing in the development of a variety of simulation and training technologies for the military, healthcare, and entertainment sectors	✓	
Life Sciences	Companies specializing in biotechnology research, pharmaceuticals, and medical devices.	✓	
Information Technology	Companies specializing in software development and service, data processing, and information retrieval	✓	

Source: Enterprise Florida and Team Volusia, 2014

Appendix IV:

Maps

