

# Marketing, Design, and Publishing



9th

Largest **marketing, design, and publishing** cluster in Florida.



2,393

Employed in the **marketing, design, and publishing** cluster.



678

Establishments in the **marketing, design, and publishing** cluster.



-7.9%

Average annual employment growth in the **marketing, design, and publishing** cluster.



226

Job seekers from top 20 occupations in the **marketing, design, and publishing** cluster.

# Industry Overview

Southwest Florida is home to the ninth largest marketing, design, and publishing cluster in Florida. The cluster, which includes 22 different types of industries, is made up of just four subclusters. These subclusters include marketing-related services, design services, publishing, and advertising. With 678 companies, this cluster employs over 2000 workers with either high school or college degrees. Individually, these companies are small and employ less than 10 workers each (83 percent employ fewer than five workers). The majority of these companies are located in Lee and Collier counties where marketing, advertising and design services are in great demand, given the growth of commercial and residential real estate in these two counties.

Firms included in this cluster provide jobs for workers skilled in both physical and graphical design. Jobs range from the mundane to the creative as the cluster includes jobs in public relations, advertising, publishing, interior and industrial design, as well as specialized design services. Depending on the type of skills required by the specific company part of this cluster, salaries start at the minimum wage and rise higher, depending on the training, education and creativity of the worker. Specific occupations in this cluster range widely and include clerks, photographers, librarians, directors and film editors, multimedia artists, and animators.

As this region continues to grow, the need for the services provided by these companies has been and will remain strong, with the exception of the publishing subcluster. The 21 percent annual rate of decline in this subcluster (between 2009 and 2015) reflects the national pattern of downsizing due to conglomeration and growth in electronic substitutes. However, employment in the other three subclusters (advertising, marketing and design services) have managed to remain stable and positive over the same time period. The largest employment growth occurred in design services, which accounts for about 30 percent of employment in this cluster. This growth is a reflection of the demand for the unique and creative skills that define the types of jobs in this subcluster.

## Economic Profile

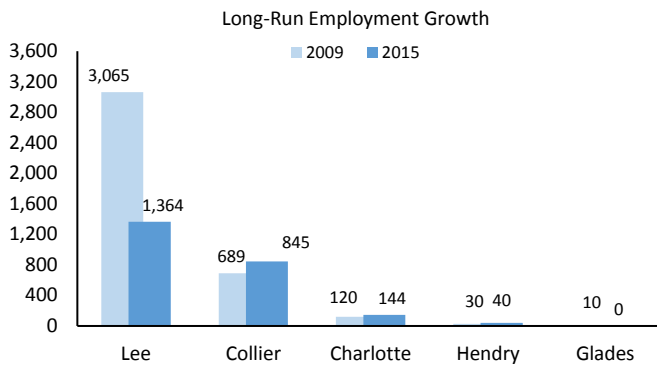
The marketing, design, and publishing cluster consists of 22, six-digit North American Industry Classification System (NAICS) codes including advertising agencies, marketing consulting services, design services, publishers, and libraries and archives. The five-county region ranked ninth in the state of Florida out of 24 workforce regions in employment for the marketing, design, and publishing cluster, with an employment level of 2,393 in 2015. The region had 678 establishments for the marketing, design, and publishing cluster in 2015. Southwest Florida saw a 6.7-percent increase in its short-run employment growth in this cluster over the past year, well above the state of Florida's employment growth rate of 0.6 percent. The location quotient for this cluster's employment relative to the state and the country were both less than one, implying that the concentration of employment in this region relative to the state and the country is low.

| Marketing, Design, and Publishing<br>Economic Profile |                   |         |
|---|-------------------|---------|
|   | Southwest Florida | Florida |
| Employment, 2015                                      | 2,393             | 64,866  |
| Number of Establishments, 2015                        | 678               | 12,022  |
| Short-run employment growth, 2014 to 2015             | 6.7%              | 0.6%    |
| Long-run employment growth, 2009 to 2015              | -38.9%            | 11.0%   |
| Average annual employment growth, 2009 to 2015        | -7.9%             | 2.1%    |
| Workforce Region Employment Ranking, 2015             | 9th               | --      |
| Location Quotient, Relative to Florida, 2015          | 0.78              | --      |
| Location Quotient, Relative to United States, 2015    | 0.60              | 0.78    |

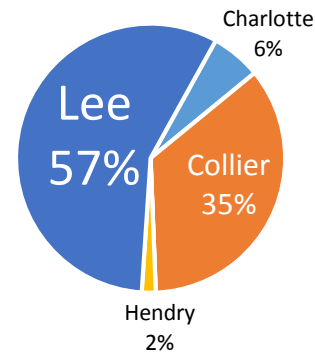
Source: County Business Patterns: 2015

# Employment by County

Marketing, Design, and Publishing



Marketing, Design, and Publishing Employment



Lee County accounts for 57 percent of the 2,393 people employed in this cluster, followed by Collier County at 35 percent, and Charlotte County at 6 percent. Marketing, design, and publishing employment in Hendry County amounted to just 2 percent of the total. There were no employees in this cluster in Glades County.

| Marketing, Design, and Publishing Employment |              |                             |
|--|--------------|-----------------------------|
| By County                                    |              |                             |
| County                                       | Employment   | Percent of Total Employment |
| Charlotte                                    | 144          | 6.0%                        |
| Collier                                      | 845          | 35.3%                       |
| Glades                                       | 0            | 0.0%                        |
| Hendry                                       | 40           | 1.7%                        |
| Lee  | 1,364        | 57.0%                       |
| <b>Southwest Florida</b>                     | <b>2,393</b> | <b>100.0%</b>               |

Source: County Business Patterns: 2015

The table below shows the number of employees per establishment for the marketing, design, and publishing cluster. Less than 10 percent of the firms in this cluster have more than 20 employees, while the majority (83 percent) have fewer than five employees. There are no firms with 100 or more employees in this cluster. Predominantly the jobs are in Lee and Collier counties.

| Marketing, Design, and Publishing Establishments |                                      |           |           |           |          |            |            |            |          |            |
|--|--------------------------------------|-----------|-----------|-----------|----------|------------|------------|------------|----------|------------|
| By County  |                                      |           |           |           |          |            |            |            |          |            |
| County   | Number of Employees in Establishment |           |           |           |          |            |            |            |          | Total      |
|  | 1 to 4                               | 5 to 9    | 10 to 19  | 20 to 49  | 50 to 99 | 100 to 249 | 250 to 499 | 500 to 999 | 1000+    |            |
| Charlotte  | 46                                   | 5         | 1         | 0         | 0        | 0          | 0          | 0          | 0        | 52         |
| Collier  | 240                                  | 20        | 14        | 3         | 1        | 0          | 0          | 0          | 0        | 278        |
| Glades   | 0                                    | 0         | 0         | 0         | 0        | 0          | 0          | 0          | 0        | 0          |
| Hendry   | 4                                    | 0         | 0         | 0         | 0        | 0          | 0          | 0          | 0        | 4          |
| Lee  | 279                                  | 31        | 21        | 10        | 3        | 0          | 0          | 0          | 0        | 344        |
| <b>Southwest Florida</b>                         | <b>569</b>                           | <b>56</b> | <b>36</b> | <b>13</b> | <b>4</b> | <b>0</b>   | <b>0</b>   | <b>0</b>   | <b>0</b> | <b>678</b> |

Source: County Business Patterns: 2015

Employment in the marketing, design, and publishing cluster declined by 38.9 percent in Southwest Florida from 2009 to 2015. Lee County lost 1,701 jobs, or 55.5 percent of its 2009 total. The trend to digital publishing has had an effect on employment. For example, over 200 jobs were directly lost due to the restructuring of Source Interlink. This was partially offset by gains of 156 jobs in Collier County (up 22.6 percent), and 24 in Charlotte County (20 percent). Glades County, with only 10 jobs in this area in 2009, lost all of them by 2015.

| Marketing, Design, and Publishing Long-Run Employment Growth |              |              |                |                               |
|--|--------------|--------------|----------------|-------------------------------|
| By County  |              |              |                |                               |
| County   | Employment   |              | Percent Change | Average Annual Percent Change |
|  | 2009         | 2015         |                |                               |
| Charlotte  | 120          | 144          | 20.0%          | 3.1%                          |
| Collier  | 689          | 845          | 22.6%          | 3.5%                          |
| Glades   | 10           | 0            | -100.0%        | -100.0%                       |
| Hendry   | 30           | 40           | 33.3%          | 4.9%                          |
| Lee  | 3,065        | 1,364        | -55.5%         | -12.6%                        |
| <b>Southwest Florida</b>                                     | <b>3,914</b> | <b>2,393</b> | <b>-38.9%</b>  | <b>-7.9%</b>                  |

Source: County Business Patterns: 2015

## Employment by Subcluster

The marketing, design, and publishing cluster is comprised of four subclusters: advertising related services, other marketing services, design services, and publishing. Information regarding employment by subcluster can be found below. Employment is somewhat evenly distributed among the four, with the largest percentage in the design services subcluster (30 percent) and the lowest (20.5 percent) in advertising related services. Despite the loss in publishing jobs between 2009 and 2015, this subcluster still accounted for about a quarter of all the jobs in this cluster.

| Marketing, Design, and Publishing Employment |              |                             |
|--|--------------|-----------------------------|
| By Subcluster                                |              |                             |
| Subcluster                                   | Employment   | Percent of Total Employment |
| Design Services                              | 721          | 30.1%                       |
| Other Marketing Related Services             | 600          | 25.1%                       |
| Publishing                                   | 582          | 24.3%                       |
| Advertising Related Services                 | 490          | 20.5%                       |
| <b>Total</b>                                 | <b>2,393</b> | <b>100.0%</b>               |

Source: County Business Patterns: 2015

The total number of establishments in the marketing, design, and publishing cluster, by establishment, was 678 in 2015. The table of the four subclusters of this cluster indicates that the largest number of establishments are in the design services subcluster (253) and the smallest number is in publishing (92). The number of employees per establishment in all the subclusters is predominantly less than 50, with many establishments employing 1 to 4 employees (84 percent).

| Marketing, Design, and Publishing Establishments |                                      |           |           |           |          |            |            |            |          |            |
|--|--------------------------------------|-----------|-----------|-----------|----------|------------|------------|------------|----------|------------|
| By Subcluster                                    |                                      |           |           |           |          |            |            |            |          |            |
| Subcluster                                       | Number of Employees in Establishment |           |           |           |          |            |            |            |          | Total      |
|  | 1 to 4                               | 5 to 9    | 10 to 19  | 20 to 49  | 50 to 99 | 100 to 249 | 250 to 499 | 500 to 999 | 1000+    |            |
| Design Services                                  | 213                                  | 23        | 15        | 2         | 0        | 0          | 0          | 0          | 0        | 253        |
| Other Marketing Related Services                 | 203                                  | 13        | 6         | 4         | 1        | 0          | 0          | 0          | 0        | 227        |
| Advertising Related Services                     | 80                                   | 14        | 8         | 3         | 1        | 0          | 0          | 0          | 0        | 106        |
| Publishing                                       | 73                                   | 6         | 7         | 4         | 2        | 0          | 0          | 0          | 0        | 92         |
| <b>Total</b>                                     | <b>569</b>                           | <b>56</b> | <b>36</b> | <b>13</b> | <b>4</b> | <b>0</b>   | <b>0</b>   | <b>0</b>   | <b>0</b> | <b>678</b> |

Source: County Business Patterns: 2015

The growth rate of employment over a six-year period in the four subclusters of advertising, other marketing related services, design services, and publishing, is shown in the table below. As noted previously, employment in this cluster declined by 38.9 percent, or at an average annual rate of about 8 percent. Three of the four subclusters experienced employment growth over the six-year period (2009-2015). However, the serious decline of about three quarters of all the jobs in the publishing sector weighed down total employment growth in this cluster. The job decline in this subcluster mirrors the pattern of job losses in this sector nationally. The fastest growing subcluster was design services, where employment increased by 35.5 percent over the 6-year period or at a 5 percent annual rate of growth. The other two subclusters (marketing and advertising) showed sustainable growth rates during this time period.

| Marketing, Design, and Publishing Long-Run Employment Growth |              |              |                |                               |
|--|--------------|--------------|----------------|-------------------------------|
| By Subcluster  |              |              |                |                               |
| Subcluster   | Employment   |              | Percent Change | Average Annual Percent Change |
|  | 2009         | 2015         |                |                               |
| Design Services  | 532          | 721          | 35.5%          | 5.2%                          |
| Other Marketing Related Services                             | 539          | 600          | 11.3%          | 1.8%                          |
| Advertising Related Services                                 | 459          | 490          | 6.8%           | 1.1%                          |
| Publishing   | 2,384        | 582          | -75.6%         | -20.9%                        |
| <b>Total</b>   | <b>3,914</b> | <b>2,393</b> | <b>-38.9%</b>  | <b>-7.9%</b>                  |

Source: County Business Patterns: 2015

# Workforce Ranking

Of all the workforce regions in the state of Florida, the Southwest Florida region ranked ninth in terms of number of employees in the marketing, design, and publishing cluster in 2015. Southwest Florida was ranked just below the Suncoast workforce region (ranked eighth, 2,562 employees) and above the Capital workforce region (ranked 10th, 2,201 employees). A complete list of the workforce rankings by number of employees can be found below.

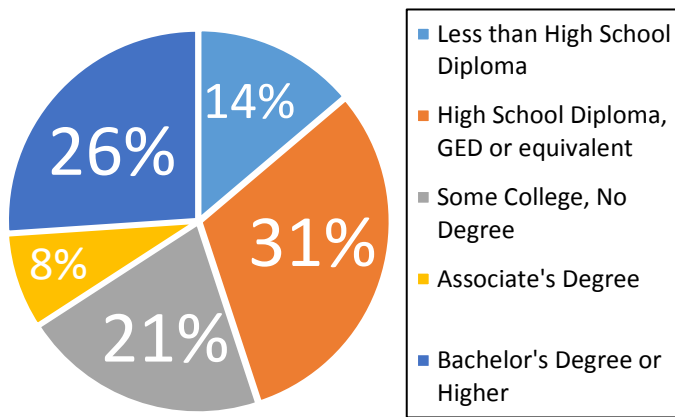
| Marketing, Design, and Publishing<br>Workforce Rankings |                          |                  |
|---|--------------------------|------------------|
| Rank  | Workforce Region         | Employment Level |
| 1   | South Florida            | 9,807            |
| 2   | Central Florida          | 9,266            |
| 3   | Pinellas                 | 8,696            |
| 4   | Tampa Bay                | 7,813            |
| 5   | Broward                  | 7,256            |
| 6   | Palm Beach County        | 6,501            |
| 7   | Northeast Florida        | 3,095            |
| 8   | Suncoast                 | 2,562            |
| <b>9</b>  | <b>Southwest Florida</b> | <b>2,393</b>     |
| 10  | Capital Region           | 2,201            |
| 11  | Flagler Volusia          | 1,535            |
| 12  | Research Coast           | 1,087            |
| 13  | North Central Florida    | 997              |
| 14  | Brevard                  | 824              |
| 15  | Escarosa                 | 700              |
| 16  | Pasco Hernando           | 672              |
| 17  | Polk                     | 651              |
| 18  | Citrus Levy Marion       | 524              |
| 19  | Okaloosa Walton          | 369              |
| 20  | Gulf Coast               | 214              |
| 21  | Heartland                | 103              |
| 22  | North Florida            | 90               |
| 23  | Chipola                  | 60               |
| 24  | Florida Crown            | 54               |

Source: County Business Patterns: 2015

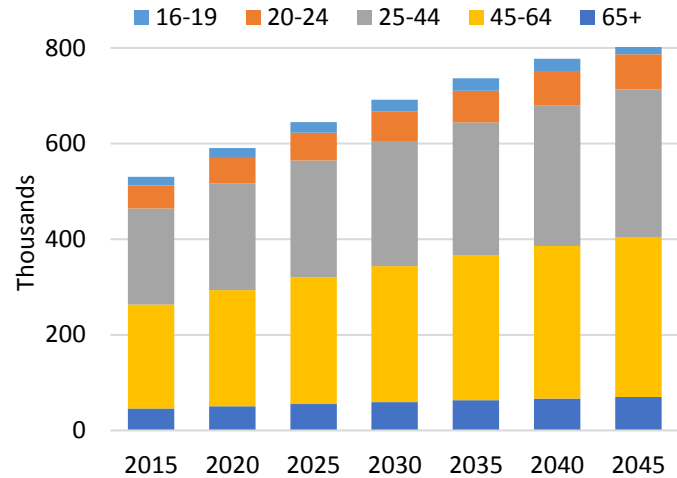
## Workforce Profile

Many companies choose to operate in Southwest Florida due to its workforce. Of the region's adult population, 26 percent have a Bachelor's Degree or higher, while 86 percent have at least a high school diploma. Florida Gulf Coast University conferred 2,331 Bachelor's Degrees to students during the 2015-2016 academic year, while Florida Southwestern State College, with its four campuses throughout the region, conferred 1,942 Associate's Degrees and 341 Bachelor's Degrees during the 2014-2015 academic year. Other educational institutions serving the area include Hodges University in Naples and Kaiser University in Fort Myers. Meanwhile, regional training programs, such as CareerSource Florida, provide training programs and certificates in numerous areas. Furthermore, the composition of the workforce is expected to change as the population grows over the next 25 years. Southwest Florida's population is expected to grow 50 percent by 2045, expanding the region's customer base while increasing its labor force by 54 percent.

## Educational Attainment



## Projected Labor Force



## Marketing, Design, and Publishing Occupations

By Total Employed

| Occupation  | Total Working Across All Industries | Number of Available Applicants | Number of Graduates | Entry Wage | Median Wage | Experienced Wage | Education Level           |
|---|-------------------------------------|--------------------------------|---------------------|------------|-------------|------------------|---------------------------|
| Shipping, Receiving, and Traffic Clerks                       | 1,251                               | 24                             | 0                   | \$9.81     | \$12.55     | \$15.00          | PSAV                      |
| Advertising Sales Agents                                      | 852                                 | 13                             | 0                   | \$14.98    | \$21.18     | \$29.83          | PSAV                      |
| Graphic Designers   | 713                                 | 22                             | 9                   | \$15.30    | \$19.45     | \$24.93          | Some College              |
| Order Clerks  | 438                                 | 2                              | 0                   | \$10.24    | \$13.78     | \$15.80          | High School/GED           |
| Interior Designers  | 435                                 | 21                             | 17                  | \$15.33    | \$20.13     | \$28.20          | Some College              |
| Photographers   | 365                                 | 8                              | 0                   | \$8.87     | \$15.50     | \$18.09          | PSAV                      |
| Producers and Directors                                       | 297                                 | 8                              | 0                   | \$19.51    | \$32.74     | \$35.84          | Bachelor's Degree         |
| Librarians  | 267                                 | 3                              | 0                   | \$21.14    | \$28.71     | \$33.51          | Master's Degree or Higher |
| Couriers and Messengers                                       | 249                                 | 18                             | 0                   | \$9.63     | \$13.12     | \$14.36          | Less than High School     |
| Library Assistants, Clerical                                  | 244                                 | 7                              | 0                   | \$10.15    | \$12.68     | \$14.01          | PSAV                      |
| Library Technicians   | 230                                 | 1                              | 0                   | \$11.24    | \$14.92     | \$18.27          | Some College              |
| Cargo and Freight Agents                                      | 184                                 | 20                             | 0                   | \$11.25    | \$18.67     | \$24.46          | PSAV                      |
| Marketing Managers  | 155                                 | 36                             | 95                  | \$26.50    | \$40.15     | \$56.05          | Bachelor's Degree         |
| Mail Clerks and Mail Machine Operators, Except Postal Service | 100                                 | 7                              | 0                   | \$9.88     | \$13.48     | \$15.70          | High School/GED           |
| Media and Communication Workers, All Other                    | 87                                  | 5                              | 0                   | \$17.28    | \$24.78     | \$29.50          | Some College              |
| Multimedia Artists and Animators                              | 65                                  | 6                              | 20                  | \$17.06    | \$19.30     | \$22.00          | Some College              |
| Cartographers and Photogrammetrists                           | 31                                  | 2                              | 0                   | \$27.35    | \$49.23     | \$50.69          | Bachelor's Degree         |
| Film and Video Editors  | 30                                  | 3                              | 0                   | \$13.81    | \$17.57     | \$19.47          | Some College              |
| Advertising and Promotions Managers                           | 21                                  | 10                             | 0                   | \$50.77    | \$60.87     | \$62.83          | Bachelor's Degree         |
| Designers, All Other  | 17                                  | 10                             | 0                   | \$19.80    | \$23.53     | \$38.85          | Some College              |

Source: Florida Department of Economic Opportunity, Occupational Supply/Demand Report

# Cluster Highlights

## KEY COMPANY ANNOUNCEMENTS

- ACI Worldwide, a global, publicly-traded company headquartered in Naples, received nine various award and rankings in 2016. Among their recent acquisitions include Retail Decisions (ReD) and PAY.ON.

## EVENTS, AWARDS AND RECOGNITIONS

- In 2017, the Above Board Chamber of Florida held an event called What's In Your Marketing Toolbox! first in Collier County on April 10th and then again in Lee County on April 13th. The event had a total of 65 attendees, and featured members of the community in the marketing industry as panelists. The Above Board Chamber of Florida is an organization dedicated to "bringing people of all faiths together within the community, in the workplace and amongst one another."
- Every year, the Florida Public Relations Chapter Southwest Florida Chapter hosts its annual Media Breakfast event, which features a panel of media professionals and networking opportunities. In 2017, the event was on June 6th with the theme "The 2017 Playbook: Media Relations in an Evolving Market."
- Florida SouthWestern State College earned six awards at the Association of Florida College's Fall 2016 convention. These were First Place for Best College Magazine and for Best Bang for the Buck; Second Place for Article in a College-Produced Publication, Display/Presentation Board and Exemplary Practice; and Third Place for Direct Mail Piece/Campaign.
- 4What Interactive provides website and video products and online solutions for many global and FORTUNE 500 companies. It is based in Naples has added satellite offices in North Carolina and London, England.
- The Collier County Public library has, through an existing partnership, made the Naples Jail Center and Immokalee Jail Center outreach branches of the library system. This allows inmates to check out books digitally, giving them access to more resources and allowing them to use the library services when they reintegrate into the community.
- Chris Spiro, owner of the Fort Myers-based marketing firm Spiro and Associates, was named 2016 Distinguished Entrepreneur of Southwest Florida, by Florida Gulf Coast University's Small Business Development Center.

## Companies

- 4 What Interactive  
[www.4what.com](http://www.4what.com)
- AccuData Integrated  
[www.accudata.com](http://www.accudata.com)
- ACI Worldwide, Inc.  
[www.aciworldwide.com](http://www.aciworldwide.com)
- Alesco Data Solutions, LLC  
[www.alescodata.com](http://www.alescodata.com)
- Ambius Ft. Myers  
[www.ambius.com](http://www.ambius.com)
- Breeze Corp.  
[www.breezenewspapers.com](http://www.breezenewspapers.com)
- Cone Communications Co.  
[www.conecomm.com](http://www.conecomm.com)
- Curtis Allen Designs  
[www.curtisallendesigns.com](http://www.curtisallendesigns.com)
- Data Partners Inc.  
[www.datapartners.com](http://www.datapartners.com)
- Dex Media  
[www.dexmedia.com](http://www.dexmedia.com)
- Entech Computer Services  
[www.entechus.com](http://www.entechus.com)
- Gulfshore Life Magazine  
[www.gulfshorelife.com](http://www.gulfshorelife.com)
- Home Mag Inc.  
[www.thehomemag.com](http://www.thehomemag.com)
- Lamar Media Corp.  
[www.lamar.com](http://www.lamar.com)
- Mediabrain  
[www.mediabrain.com](http://www.mediabrain.com)
- Netexpress Inc.  
[www.shipwithnet.com](http://www.shipwithnet.com)
- News Bank Inc.  
[www.newsbank.com](http://www.newsbank.com)
- Nielsen Co.  
[www.nielsen.com](http://www.nielsen.com)
- Open Sky Media  
[www.hadleycapital.com](http://www.hadleycapital.com)
- Priority Marketing of SW FL  
[www.prioritymarketing.com](http://www.prioritymarketing.com)
- Romanza Architectural Interior Design  
[www.romanza.com](http://www.romanza.com)
- Southwest Direct Inc.  
[www.swdirect.com](http://www.swdirect.com)



# Education & Training

Florida's system of higher and post-secondary education provides hundreds of training programs generating advanced degrees and occupational certificates that prepare students for productive careers in our region. The state university system includes 13 institutions, while community colleges number 28. Furthermore, there are 84 private universities and occupational and technical schools in the state. A list of the top educational institutions producing graduates that work in the marketing, design, and publishing cluster would include the following:

- Florida Gulf Coast University  
[www.fgcu.edu](http://www.fgcu.edu)
- Hodges University  
[www.hodges.edu](http://www.hodges.edu)
- Rasmussen College  
[www.rasmussen.edu](http://www.rasmussen.edu)
- Broward College  
[www.broward.edu](http://www.broward.edu)
- University of Miami  
[www.miami.edu](http://www.miami.edu)
- Florida State University  
[www.fsu.edu](http://www.fsu.edu)
- University of Central Florida  
[www.ucf.edu](http://www.ucf.edu)
- Florida SouthWestern State College  
[www.fsw.edu](http://www.fsw.edu)
- Keiser University  
[www.keiseruniversity.edu](http://www.keiseruniversity.edu)
- Florida Atlantic University  
[www.fau.edu](http://www.fau.edu)
- Florida International University  
[www.fiu.edu](http://www.fiu.edu)
- Miami-Dade College  
[www.mdc.edu](http://www.mdc.edu)
- University of Florida  
[www.ufl.edu](http://www.ufl.edu)
- University of South Florida  
[www.usf.edu](http://www.usf.edu)

# Cluster Definition

The marketing, design, and publishing cluster is comprised of 22 six-digit NAICS codes that form four subclusters. A list of each subcluster and NAICS category, along with the appropriate six-digit NAICS codes, can be found in the table below.

| Marketing, Design, and Publishing<br>Breakdown of Subclusters |                    |
|---|--------------------|
| Subcluster/NAICS Description                                  | 6-Digit NAICS Code |
| <i>Advertising Related Services</i>                           |                    |
| Advertising Agencies  | 541810             |
| Outdoor Advertising   | 541850             |
| Direct Mail Advertising                                       | 541860             |
| Advertising Material Distribution Services                    | 541870             |
| Other Services Related to Advertising                         | 541890             |
| <i>Other Marketing Related Services</i>                       |                    |
| Marketing Consulting Services                                 | 541613             |
| Public Relations Agencies                                     | 541820             |
| Media Buying Agencies   | 541830             |
| Media Representatives   | 541840             |
| Marketing Research and Public Opinion Polling                 | 541910             |
| <i>Design Services</i>  |                    |
| Interior Design Services                                      | 541410             |
| Industrial Design Services                                    | 541420             |
| Graphic Design Services                                       | 541430             |
| Other Specialized Design Services                             | 541490             |
| <i>Publishing</i>   |                    |
| Periodical Publishers   | 511120             |
| Book Publishers   | 511130             |
| Directory and Mailing List Publishers                         | 511140             |
| All Other Publishers  | 511199             |
| News Syndicates   | 519110             |
| Libraries and Archives  | 519120             |
| Internet Publishing and Broadcasting and Web Search Portals   | 519130             |
| All Other Information Services                                | 519190             |

Source: U.S. Cluster Mapping Project, Institute for Strategy and Competitiveness, Harvard Business School