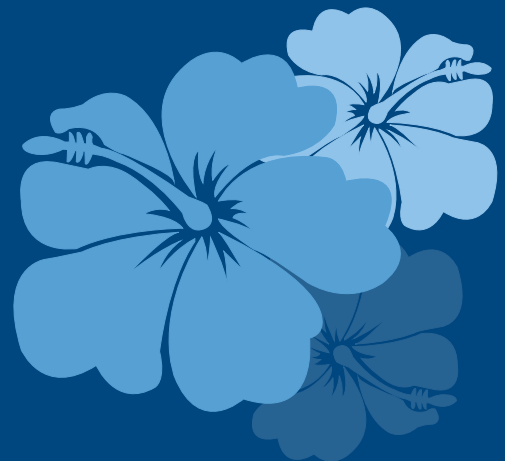


DEVELOPING A SHARED AGENDA FOR NORTH SHORE'S ECONOMIC VITALITY AND COMMUNITY WELL-BEING

PHASE I Cluster Assessment Report

May 29, 2013

Prepared by
Collaborative Economics



Prepared by

Collaborative Economics, Inc. | www.coecon.com

Collaborative Economics works with senior executives from business, foundations, government, education and community sectors - helping them create breakthroughs in how people think and act regarding their region.

Collaborative Economics' clients have the passion, vision and commitment to blaze a new pathway for their community. They understand that a new kind of leadership is required to create great places, with thriving economies and world-class quality of life.

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DEVELOPING THE REGION'S CLUSTERS OF OPPORTUNITY STRATEGY

Introduction

The North Shore of the island of O‘ahu is world renowned for its natural beauty and is recognized as a ‘must see’ destination for more than half of the almost five million tourists visiting the island each year.¹ However, the verdant valleys and pristine beaches are only the cover of a complex rural community with deep roots to the land and a cultural history reaching back generations. The region finds itself at a crossroads with communities searching to balance increased development pressure and the need for affordable housing with the desire to conserve open spaces and still provide new economic growth opportunities.

North Shore communities want to understand the dynamic economic landscape of the region and engage in activities that build on traditional industries of agriculture and tourism, while creating new economic opportunities. Development of an economic plan will focus on identifying regionally appropriate areas that preserve the unique natural assets of the region, while also bolstering the economy to create jobs for residents.

Hawai‘i’s state motto is “the life of the land is perpetuated in righteousness” and this should be an important goal of this economic strategy—to implement a shared agenda for economic vitality and community well-being in the North Shore that builds on the shared values of Hawai‘i and the North Shore.

Project Background

A coalition of individuals and organizations on the North Shore have joined together to support this project because they are committed to the vision of economic vitality in this special region. They have formed a group of project stewards who will work closely with Collaborative Economics to guide this cluster identification and strategic planning project.

The North Shore Economic Vitality Partnership includes:

Kevin Kelly - Chair

Advisor to the Vice President for Research
University of Hawai‘i &
North Shore Community Resident

Susan Matsushima - Co-Chair

Sustainable Agriculture & Working
Landscapes
CEO - Alluvion, Inc.
Chairman of the Board
North Shore Chamber of Commerce

Larry Jeffs - Co-Chair

Sustainable Agriculture & Working
Landscapes
Farmer

John Morgan - Co-Chair

North Shore Experience
President
Kualoa Ranch

Marty Thomas - Co-Chair

North Shore Experience
Contest Director
Van's Triple Crown of Surfing

David Baker

Owner
Kahuku Sugar Mill

Doug Cole

Executive Director
North Shore Community Land Trust

Kalani Fronda

Senior Land Asset Manager
The Kamehameha Schools

Danna Holck

General Manager
Turtle Bay Resort
North Shore Chamber Board

T. Michael Moser

Director
Career & Community Education
Windward Community College

Antya Miller

Executive Director
North Shore Chamber of Commerce

Kathleen M. Pahinui

Vice President, Account Services
Anthology Marketing Group
North Shore Neighborhood Board
North Shore Chamber Board

Lee Sichter

Planning Consultant
Lee Sichter LLC

Ron Weidenbach

President
Hawai‘i Fish Company

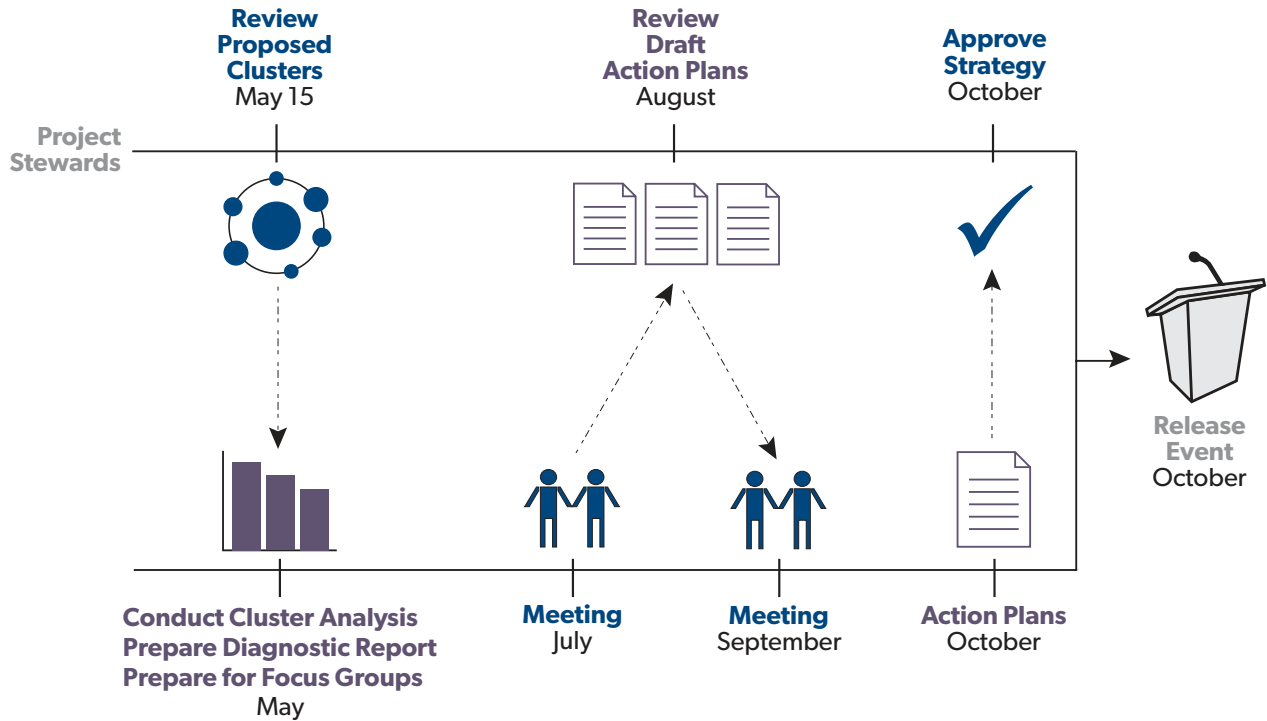
¹ North Shore Chamber of Commerce. *Population & Economic Statistics*. Web.

Project Overview

This North Shore Cluster Assessment Report serves as a foundational document for Phase I of the region's Economic Strategy Plan process (see project timeline below). Collaborative Economics has identified three clusters of opportunity that drive the region's economy and will explore two clusters in depth in this Assessment.

The next step in the process to develop an Economic Strategy Plan for the North Shore will be to convene groups of employers to identify high-priority opportunities and requirements for industry growth, vitality, and competitiveness. Based on these meetings, the co-chairs and champions will develop a draft set of actions, with specific steps, outcomes, and implementation commitments. Each cluster group will develop an Action Plan that along with the cluster assessment will be combined into an overall Economic Strategy Plan for release in Fall 2013. At that point, the implementation process will be launched.

Project Timeline



What are Clusters of Opportunity?

Clusters of opportunity are sectors of the economy identified by growth in one or more areas:

- **Value:** the sector brings wealth to the region
- **Jobs:** the sector has experienced strong short-term or long-term employment growth
- **Wages:** the average wages for the sector are high-value and increasing

A cluster of opportunity elaborates on the concept of an industry cluster—traditionally seen as export-oriented, geographically-concentrated, as well as shared labor pools and other specialized infrastructure—by including pathways for upward mobility for residents.

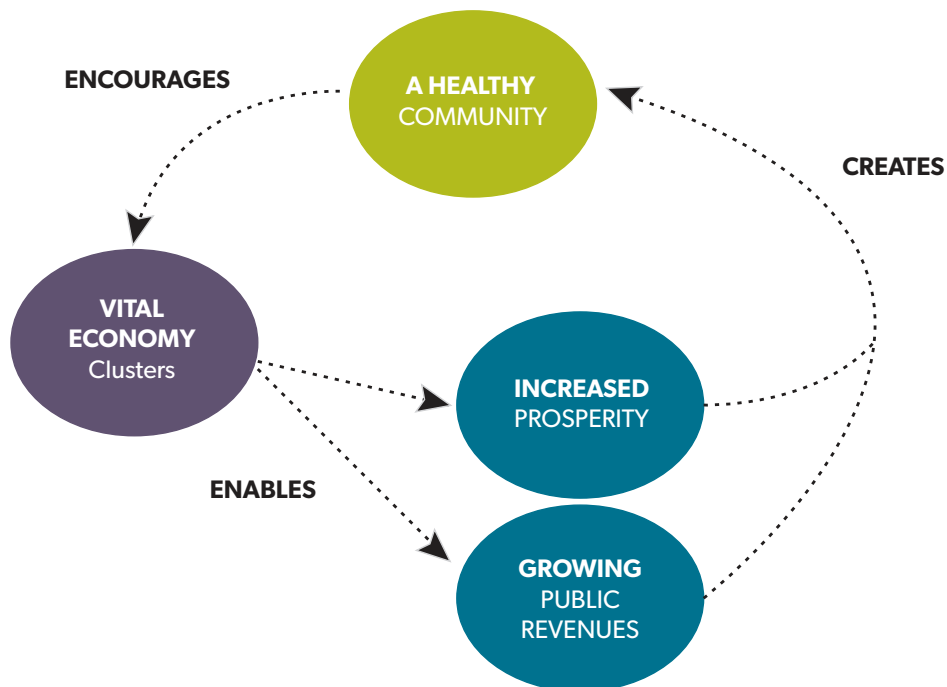
A cluster of opportunity also focuses on the size of sectors, not just their potential for rapid growth, and looks closely at population-serving activities in addition to the region's economic base. A cluster of opportunity can be export oriented, based on a regional specialization, or represent an opportunity with career advancement for local residents—or, it can combine several elements that meet economic growth and workforce investment goals.

The clusters drive economic vitality, generating jobs and wages for residents and expanding purchases of products and services from local suppliers, all resulting in a positive ripple effect to create benefits for every community in the region. The clusters also generate tax revenues that fuel local public services and support a better quality of life for local residents. The clusters, if innovative, competitive, and healthy, will drive the economic prosperity of the North Shore.

Clusters of Opportunity



A Prosperous Economy Drives the Vital Cycle



For these reasons, clusters of opportunity provide the logical starting point for an Economic Strategy for the region. Based on data analysis of business establishments and findings supported by local business, economic development and workforce development partners, the following clusters (represented by the following industries) were chosen.²



Sustainable Agriculture & Working Landscapes includes grocery stores, markets, florists, caterers, specialty restaurants,³ food processing, farming, veterinary services, agricultural support, marinas, aquaculture, film production companies, ranches, environmental and wildlife groups, urban and rural planning and development, conservation programs and resource management.



North Shore Experience contains museums, recreational tours, uniquely Hawai'i manufacturing,⁴ clothing and souvenir stores, fashion, artwork, ocean recreation & surfing, accommodation, transportation and travel agencies.



Professional & Technical Services is made up of a range of businesses including technical consulting, diagnostic imaging centers, computers, information technology, finance and investment services, communications equipment manufacturing, electronics maintenance and repair, data services and architecture and engineering services.

² See Appendix B for individual cluster bubble charts and a list of cluster industry NAICS codes.

³ Specialty Restaurants are restaurants on the North Shore that either embody the Hawaiian experience or make the effort to source their food locally.

⁴ Uniquely Hawai'i Manufacturing includes all goods produced in Hawai'i, especially those relating to the Hawaiian culture such as ukuleles and surfboards.

THE NORTH SHORE'S CLUSTER ECONOMY

The North Shore's long-term (2001-2011) job growth has been driven by the cluster-based economy. **Over this period, the number of jobs in the region's cluster economy grew 23 percent, while the number of jobs in the rest of the economy grew 11 percent.** Combined, this represented an overall 16 percent job growth in the North Shore over the decade, compared to a ten percent gain in Hawai'i.

The North Shore's cluster economy has proven to be more resilient than the rest of the regional economy. During the recession, the cluster-based economy declined 2.8 percent between January 2008 and January 2010, while non-cluster industries decreased 5.6 percent (Figure 1). After this hit, the North Shore's cluster economy rebounded more quickly (increasing 3% between 2010 and 2011) than the rest of the economy (increasing less than 1%).

Figure 1
Total Employment
North Shore Region, 2007-2011

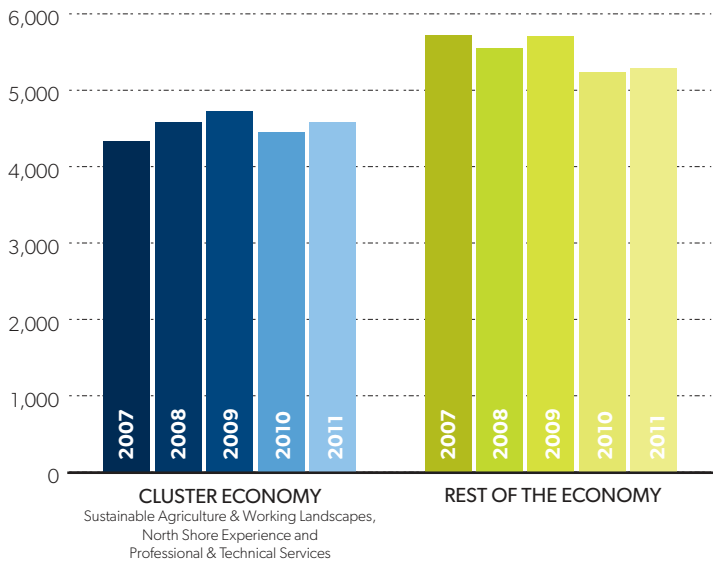


Figure 2
Clusters of Opportunity
North Shore Region, 2011

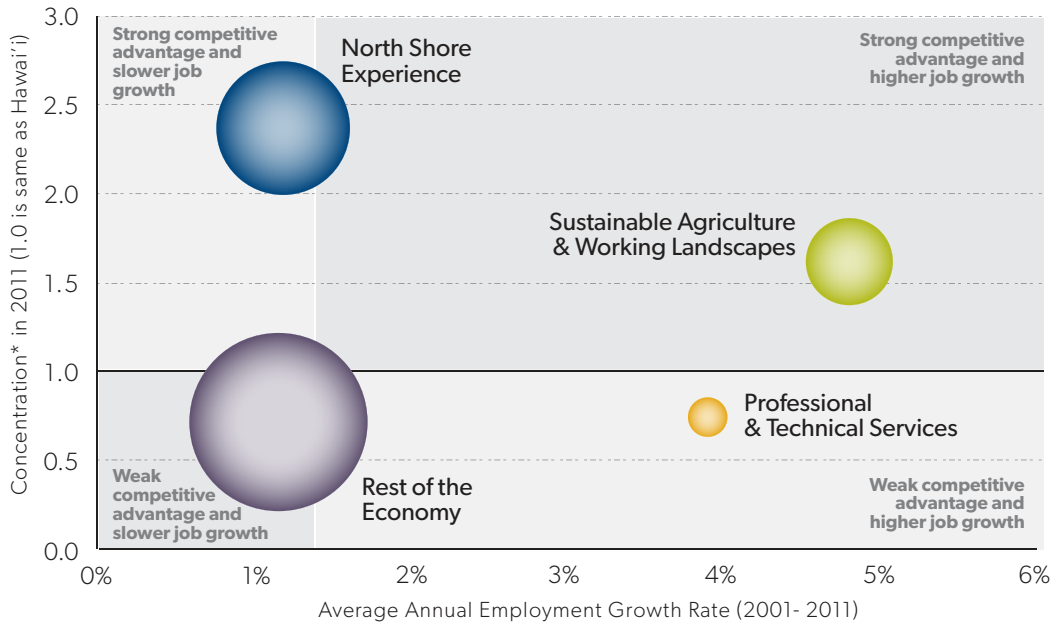
	Employment	Percent of the Total North Shore Economy	Establishments	Percent of Job Growth 2001-2011
Sustainable Agriculture & Working Landscapes	1,328	13%	202	36%
North Shore Experience	2,972	30%	238	23%
Professional & Technical Services	280	3%	98	5%
Total Cluster Economy	4,580	46%	538	64%
Total Economy	9,865	100%	1,220	100%
Rest of the Economy	5,285	54%	682	36%

Note: Healthcare & Education were included in the Rest of the Economy category
Data Source: National Establishment Time-Series Database (NETS)
Analysis: Collaborative Economics

The region's clusters have a strong competitive advantage. This means there is a greater proportion of North Shore residents employed in these individual clusters than the state average. **The North Shore Experience and Sustainable Agriculture & Working Landscapes clusters are more concentrated⁵ than their respective industries statewide (2.4 and 1.6 respectively)**(Figure 3). Both the Sustainable Agriculture & Working Landscapes and Professional & Technical Services clusters have seen rapid growth over the decade, growing 4.8 percent and 3.9 percent respectively on average each year. **As of 2011, the three clusters accounted for 46 percent of North Shore jobs, but have been responsible for 62 percent of the region's job growth since 2001** (Figure 2).

⁵ Employment concentration is a calculation that compares the percentage of employment in a region to the percentage of employment in its state counterpart. (North Shore Cluster Employment/North Shore Total Employment)/(Hawai'i Cluster Employment/Hawai'i Total Employment). A ratio greater than one signifies that employment is more concentrated in the region than it is statewide – an indication of outward orientation and a source of comparative advantage.

Figure 3
Clusters of Opportunity
 North Shore Region, 2001-2011

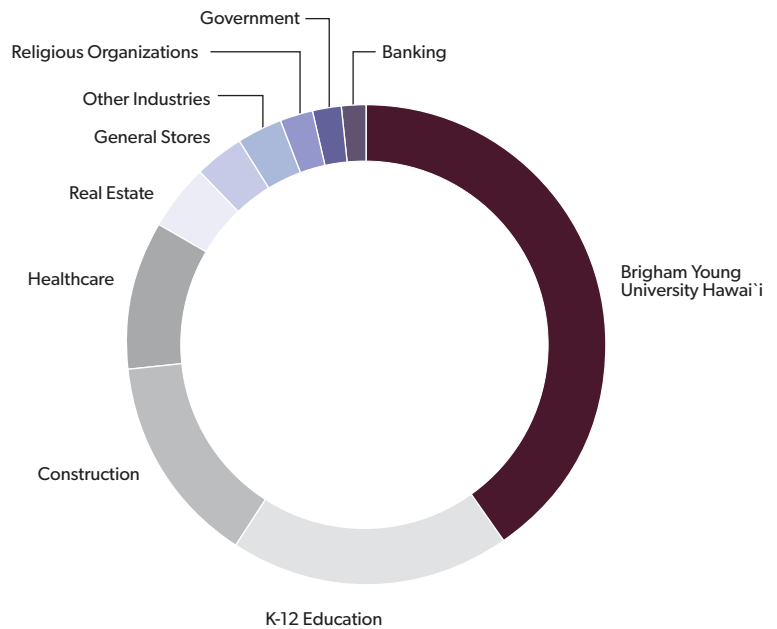


A bubble chart provides perspective on three dimensions: the size, growth and employment concentration (see footnote 5) in a cluster. The x-axis is the average annual employment growth rate between 2001 and 2011. The y-axis is the employment concentration relative to the state of Hawai'i in 2011, and the size of the bubble is the number of jobs in 2011.

*Concentration is calculated as (Northshore Cluster Emp/Northshore Total Emp)/(Hawai'i Cluster Emp/Hawai'i Total Emp)
 Size of bubble represents employment size in 2011.
 Data Source: National Establishment Time-Series Database (NETS)
 Analysis: Collaborative Economics

The rest of the economy is largely comprised of non-export oriented industries. This includes education, healthcare, construction, government, real estate, banking and religious organizations (Figure 4). **While these industries are often the foundation of regional economies, they are not the basis for clusters of opportunity, which focus on regional specializations and export-oriented industries.** Brigham Young University, Hawai'i (BYUH) has a large presence on the North Shore and represents 19 percent of employment in the region. This segment of the economy is located in the rest of the economy bubble as a large portion of education. BYUH has grown significantly over the past decade, growing at an annual average rate of 8.9 percent between 2001 and 2011. It is also highly concentrated (7.6) when compared to other universities throughout the state. Understanding the dynamics of this institution could be critical to developing the clusters of opportunity in the future if students stay on the North Shore to either start businesses or participate in the export-oriented industries.

Figure 4
Rest of the Economy
 North Shore Region



Data Source: National Establishment Time-Series Database (NETS)
 Analysis: Collaborative Economics



SUSTAINABLE AGRICULTURE & WORKING LANDSCAPES CLUSTER

The North Shore has a history of being a land of plenty. During the days of the monarchy, the fertile land of the North Shore was abundant with diversified crops that provided food for the region as well as Honolulu. 'Āina momona, literally meaning the fat or abundant land, justly describes the history of the fruitful and rich land on the North Shore.

More recently, the main economic driver of the North Shore was big agriculture and the mono-crops of sugar and pineapple. Since the closure of the Waialua Sugar Company nearly two decades ago, the presence of sugar has disappeared. The region has struggled to determine how to use the land and infrastructure from the sugar industry to restore the heritage of diversified crops, a heritage that will help reemploy North Shore residents and contribute to the sustainability and food security of the region.



Sustainable Agriculture & Working Landscapes looks at the full spectrum of activities that the fertile and beautiful land of the North Shore brings to the economy. It reflects the community's commitment to stewardship of the landscape while fostering active and profitable farming and recreational operations. The North Shore's agricultural food chain spans a diverse set of industries, from agriculture support and production, to food processing and retail consumption, playing an important role in the vitality of the region. The cluster consists of a vibrant landscape of local small businesses—all contributing to the success of this industry.

The region's advantageous location adjacent to O'ahu's urban core of Honolulu, the population center of the state, supports the region's reputation as "the bread basket of Hawai'i." However, there are no Agricultural Storage establishments in the region, creating a significant break in the food supply chain. The Agricultural Support and Food Processing industries are also small. Developing these sections of the food chain can help bolster locally grown and distributed products in the North Shore.

Similar to Sustainable Agriculture, Working Landscapes is a broad term that refers to promoting the health of ecosystems as well as the livelihoods that are based on natural resources. Working landscapes initiatives support job-creation and economic growth in areas of the economy that depend on food systems. In the North Shore, this spans all aspects of the land from food systems, forestry, and fisheries, to tourism, land management and conservation. The prevalence of ranches and farms and breath-taking scenery, provide ample opportunity for growth in agricultural tourism and recreational services, including ranch tours and locations for filming movies.

Jobs within the Sustainable Agriculture & Working Landscapes cluster are highly concentrated in the region compared to the state (1.6) and represent 13 percent of the North Shore's job market (Figure 3 & 2). Statewide the cluster represents eight percent of total jobs. The Sustainable Agriculture & Working Landscapes cluster witnessed the strongest job growth of the three clusters with an annual average growth rate of 4.8 percent (Figure 3). Job growth in this cluster has been aided by the rapid average annual growth rate (26.3%) of the Conservation & Land Development industries including environmental and wildlife advocacy and urban planning groups (Appendix A & B).



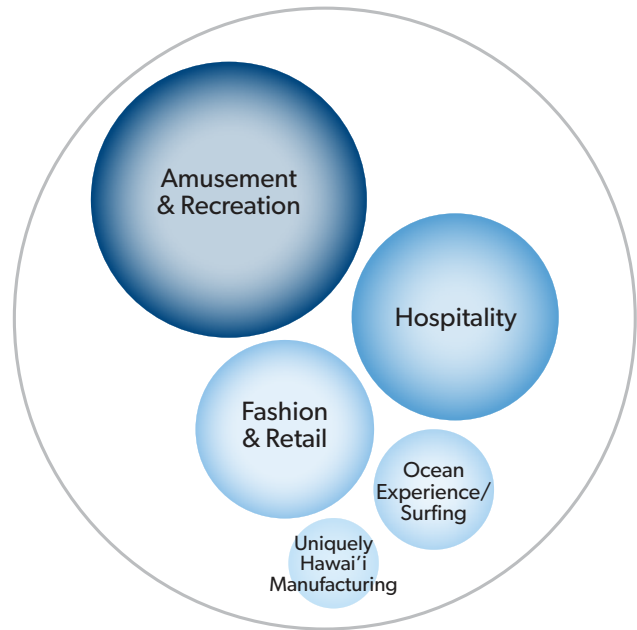


NORTH SHORE EXPERIENCE CLUSTER

The North Shore is a truly special place with its strong Hawaiian cultural foundation, beautiful scenery, and historical significance. In the winter months, the North Shore becomes the global epicenter of the surfing world, attracting the world's best surfers. While its spectacular beaches and landscapes draw visitors from all over the world, North Shore residents work to preserve their natural habitat and way of life.

It is the "North Shore Experience", whether staying on the North Shore, shopping for Hawai'i made products or partaking in one of the many activities that the North Shore has to offer, that keep individuals coming back and what residents hope to preserve. Visitors come to the North Shore for its country feel and to explore the Hawai'i of old. Most overnight visitors stay at Turtle Bay Resort with 443 accommodations (cottages, villas, rooms, suites) and plans are underway for further expansion. Other activities that enhance the visitor experience include the availability of local goods, unique shops, art galleries, restaurants and a range of recreational activities. The Polynesian Cultural Center, which offers luaus, dining and an authentic Polynesian village tours, is Hawai'i's top paid visitor attraction. These elements are integrated to create the North Shore experience—visitors come because of the unique beauty of the region, stay in hotels and engage in recreation while also purchasing goods produced locally.

Amusement & Recreation comprise over half (51%) of the North Shore Experience cluster. This cluster reported an average annual growth rate of 1.18 percent between 2001 and 2011. This was only slightly higher than the rest of the economy's rate of 1.15 percent; however, this cluster was highly concentrated (2.4) (Figure 3). Also, when broken down, key industries within the cluster grew at a much faster pace. Uniquely Hawai'i Manufacturing, though only representing three percent of the cluster, grew at an average annual growth rate of 12.3 percent (Appendix A). This sector includes locally made soaps and oils (Appendix B). Similarly, Ocean Experience/Surfing, representing nine percent of the North Shore Experience cluster grew at an average annual rate of 4.8 percent.

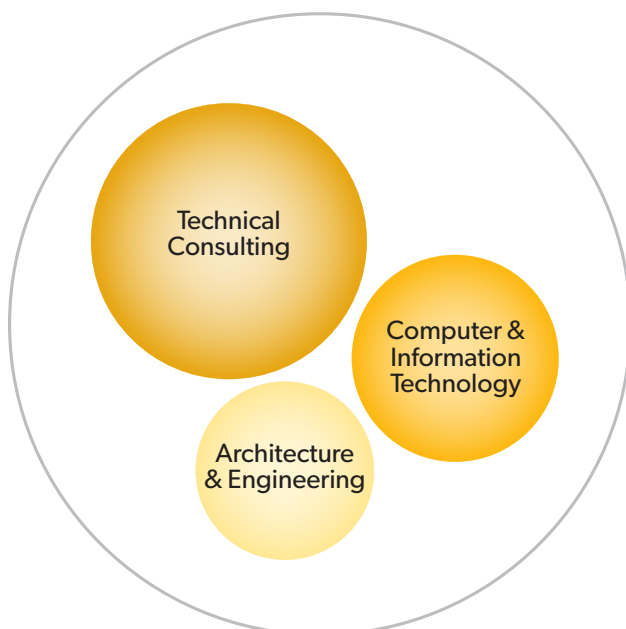




PROFESSIONAL & TECHNICAL SERVICES CLUSTER

Another thriving but currently small North Shore cluster involves Professional & Technical Services. The businesses within this cluster are usually very small, 43 of the cluster's 98 establishments are individual proprietorships. Many people move or retire to the North Shore for the location and lifestyle. Oftentimes these individuals are highly educated with a specific set of skills, and due to technology, they can work from nearly anywhere in the world. They are often "high earners", contributing to the North Shore's tax base and economy while having a very small footprint on the land. In addition, this cluster offers opportunities for North Shore kama'ainas (natives) who wish to stay and work locally. Professions within this cluster, such as data/image processing or software development, can allow people to earn an income without any additional commuting or building development. Also included in this cluster is architecture and engineering services.

While Professional & Technical Services is the least concentrated (0.74) of the clusters when compared to Hawai'i as a whole, its average annual growth rate (3.9%) is significantly higher than the rest of the economy (1.2%) (Figure 3). This growth is mostly attributed to Architecture & Engineering industries, which experienced an average annual growth rate of 15 percent between 2001 and 2011 (Appendix A). Technical Consulting is the largest industry within Professional & Technical Services, accounting for 44 percent of the cluster, and is also the only industry within the cluster with a concentration higher than the state average (1.2). The slow average annual growth rate (0.3%) of the cluster's second largest industry, Computers & Information Technology, presents a potential problem for the success of the Professional & Technical Services cluster. Computers & Information Technology enable both Architecture & Engineering and Technical Consulting to be worldwide industries, if the proper infrastructure is not in place, the Professional & Technical Services Cluster will not be able to succeed on the North Shore.



NEXT STEPS

From the assessment, three clusters emerged in industries that are growing and highly specialized—North Shore Experience, Sustainable Agriculture & Working Landscapes and Professional & Technical Services. Each cluster draws on regional strengths as well as the importance of the land and the cultural heritage of the North Shore. Moving forward, we will focus on North Shore Experience and Sustainable Agriculture & Working Landscapes as they are the largest clusters, highly concentrated and fast growing.

The next step will be for regional stewards in these key areas to develop and implement actions that will improve the economic vitality and community well-being on the North Shore. This process will begin with focus group meetings, followed by a draft Action Plan that will be finalized into an Economic Strategy Plan to be released in the Fall.

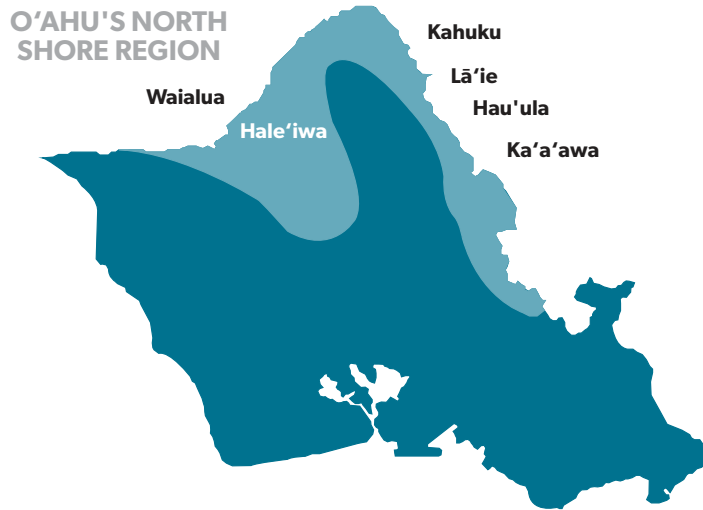
APPENDIX A: Geographic and Industry Data

National Establishment Time-Series Database

The National Establishment Time-Series Database (NETS), prepared by Walls & Associates using Dun & Bradstreet establishment data, was sourced for jobs data and establishment counts.

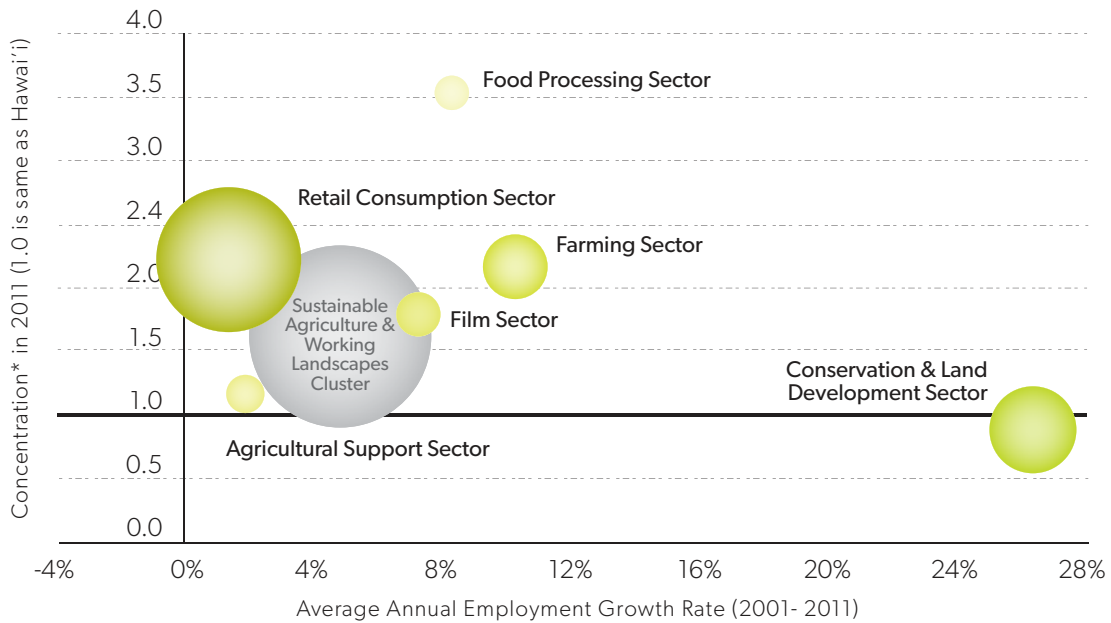
The North Shore Region was defined as the following zip codes:

Hale'iwa	96712
Waialua	96791
Kahuku	96731
Lā'ie	96762
Hau'ula	96717
Ka'a'awa	96730

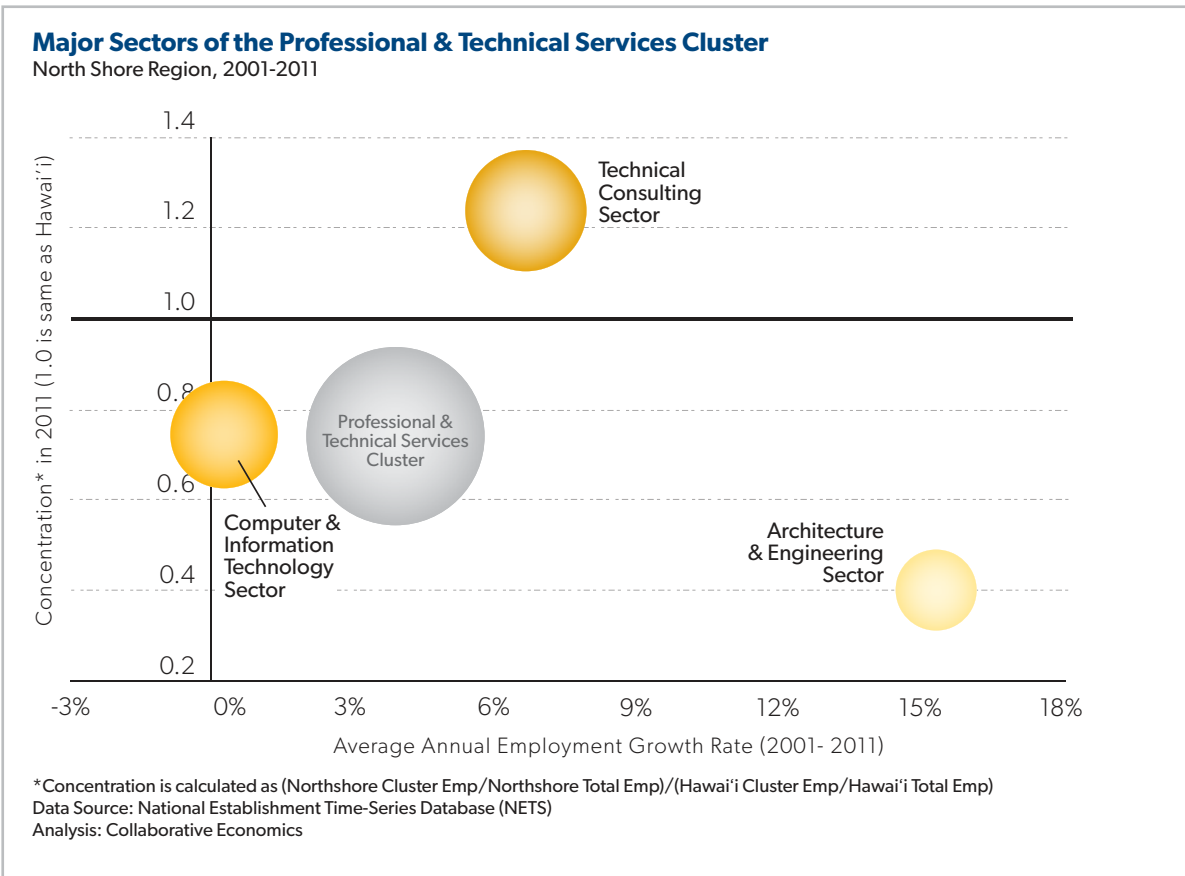
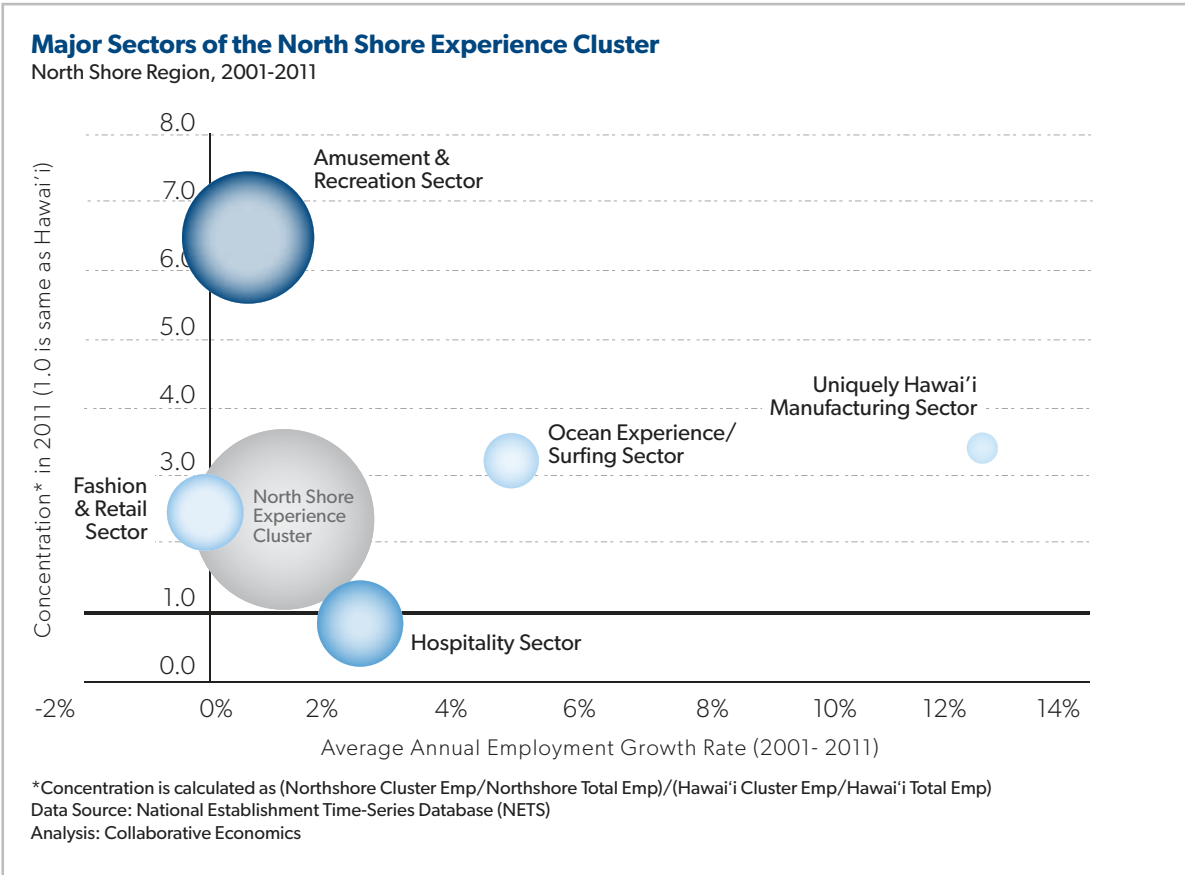


Major Sectors of the Sustainable Agriculture & Working Landscapes Cluster

North Shore Region, 2001-2011



* Concentration is calculated as (Northshore Cluster Emp/Northshore Total Emp)/(Hawai'i Cluster Emp/Hawai'i Total Emp)
 Data Source: National Establishment Time-Series Database (NETS)
 Analysis: Collaborative Economics



APPENDIX B: North Shore Clusters By Industry

Sustainable Agriculture & Working Landscapes

Retail Consumption	311811	Retail Bakeries
	424410	General Line Grocery Merchant Wholesalers
	424440	Poultry and Poultry Product Merchant Wholesalers
	424460	Fish and Seafood Merchant Wholesalers
	424480	Fresh Fruit and Vegetable Merchant Wholesalers
	424490	Other Grocery and Related Products Merchant Wholesalers
	424590	Other Farm Product Raw Material Merchant Wholesalers
	424930	Flower, Nursery Stock, and Florists' Supplies Merchant Wholesalers
	445110	Supermarkets and Other Grocery (except Convenience) Stores
	445220	Fish and Seafood Markets
	445299	All Other Specialty Food Stores
	445310	Beer, Wine, and Liquor Stores
	446191	Food (Health) Supplement Stores
	453110	Florists
	722320	Caterers
*	Specialty Restaurants	
Conservation & Land Development	237210	Land Subdivision
	237310	Highway, Street, and Bridge Construction
	541110	Offices of Lawyers
	541720	Research and Development in the Social Sciences and Humanities
	813211	Grantmaking Foundations
	813312	Environment, Conservation and Wildlife Organizations
	813319	Other Social Advocacy Organizations
	813410	Civic and Social Organizations
	924110	Administration of Air and Water Resource and Solid Waste Management Programs
	924120	Administration of Conservation Programs
925120	Administration of Urban Planning and Community and Rural Development	
Farming	111150	Corn Farming
	111219	Other Vegetable (except Potato) and Melon Farming
	111320	Citrus (except Orange) Groves
	111336	Fruit and Tree Nut Combination Farming
	111339	Other Noncitrus Fruit Farming
	111421	Nursery and Tree Production
	111422	Floriculture Production
	111998	All Other Miscellaneous Crop Farming
	112111	Beef Cattle Ranching and Farming
	112340	Poultry Hatcheries
	112511	Finfish Farming and Fish Hatcheries
	112519	Other Aquaculture
112990	All Other Animal Production	

*Specialty Restaurants are from NAICS codes 722110 (Full-Service Restaurants) and 722211 (Limited-Service Restaurants) and include restaurants on the North Shore that either embody the Hawaiian experience or make the effort to source their food locally.

Sustainable Agriculture & Working Landscapes (cont.)

Film	334612	Prerecorded Compact Disc (except Software), Tape, and Record Reproducing
	512110	Motion Picture and Video Production
	512120	Motion Picture and Video Distribution
	512210	Record Production
	532230	Video Tape and Disc Rental
Agricultural Support	115112	Soil Preparation, Planting, and Cultivating
	115114	Postharvest Crop Activities (except Cotton Ginning)
	115116	Farm Management Services
	115210	Support Activities for Animal Production
	423820	Farm and Garden Machinery and Equipment Merchant Wholesalers
	424910	Farm Supplies Merchant Wholesalers
	444220	Nursery, Garden Center, and Farm Supply Stores
	541940	Veterinary Services
	713930	Marinas
Food Processing	311330	Confectionery Manufacturing from Purchased Chocolate
	311411	Frozen Fruit, Juice, and Vegetable Manufacturing
	311612	Meat Processed from Carcasses
	311999	All Other Miscellaneous Food Manufacturing

North Shore Experience

Amusement & Recreation	532292	Recreational Goods Rental
	532310	General Rental Centers
	561520	Tour Operators
	711130	Musical Groups and Artists
	711510	Independent Artists, Writers, and Performers
	712110	Museums
	713990	All Other Amusement and Recreation Industries
	722213	Snack and Nonalcoholic Beverage Bars
	812112	Beauty Salons
	812113	Nail Salons
Hospitality	485310	Taxi Service
	485320	Limousine Service
	485999	All Other Transit and Ground Passenger Transportation
	487210	Scenic and Sightseeing Transportation, Water
	488119	Other Airport Operations
	488999	All Other Support Activities for Transportation
	532120	Truck, Utility Trailer, and RV (Recreational Vehicle) Rental and Leasing
	532411	Commercial Air, Rail, and Water Transportation Equipment Rental and Leasing
	541930	Translation and Interpretation Services
	561510	Travel Agencies
	721110	Hotels (except Casino Hotels) and Motels
	721191	Bed-and-Breakfast Inns
	721199	All Other Traveler Accommodation
	721211	RV (Recreational Vehicle) Parks and Campgrounds
721310	Rooming and Boarding Houses	

North Shore Experience (cont.)

Fashion & Retail	3152	Cut and Sew Apparel Manufacturing
	315228	Men's and Boys' Cut and Sew Other Outerwear Manufacturing
	339911	Jewelry (except Costume) Manufacturing
	339914	Costume Jewelry and Novelty Manufacturing
	423940	Jewelry, Watch, Precious Stone, and Precious Metal Merchant Wholesalers
	424320	Men's and Boys' Clothing and Furnishings Merchant Wholesalers
	424330	Women's, Children's, and Infants' Clothing and Accessories Merchant Wholesalers
	424340	Footwear Merchant Wholesalers
	448110	Men's Clothing Stores
	448120	Women's Clothing Stores
	448130	Children's and Infants' Clothing Stores
	448140	Family Clothing Stores
	448190	Other Clothing Stores
	448310	Jewelry Stores
	451120	Hobby, Toy, and Game Stores
	453220	Gift, Novelty, and Souvenir Stores
453920	Art Dealers	
Ocean Experience/ Surfing	336612	Boat Building
	339920	Sporting and Athletic Goods Manufacturing
	423910	Sporting and Recreational Goods and Supplies Merchant Wholesalers
	451110	Sporting Goods Stores
	611620	Sports and Recreation Instruction
	711211	Sports Teams and Clubs
	711219	Other Spectator Sports
	711320	Promoters of Performing Arts, Sports, and Similar Events without Facilities
	713940	Fitness and Recreational Sports Centers
Uniquely Hawai'i Manufacturing*	81292	Photofinishing
	323110	Commercial Lithographic Printing
	323113	Commercial Screen Printing
	327112	Vitreous China, Fine Earthenware, and Other Pottery Product Manufacturing
	327212	Other Pressed and Blown Glass and Glassware Manufacturing
	327215	Glass Product Manufacturing Made of Purchased Glass
	332313	Plate Work Manufacturing
	339932	Game, Toy, and Children's Vehicle Manufacturing
	541922	Commercial Photography

*Uniquely Hawai'i Manufacturing includes all goods produced in Hawai'i, especially those relating to the Hawaiian culture such as ukuleles and surfboards.

Professional & Technical Services

Technical Consulting	523910	Miscellaneous Intermediation (Finance & Investment Services)
	541430	Graphic Design Services
	541690	Other Scientific and Technical Consulting Services
	541710	Research and Development in the Physical, Engineering & Life Sciences
	541990	All Other Professional, Scientific, and Technical Services
	621512	Diagnostic Imaging Centers
	811219	Other Electronic and Precision Equipment Repair and Maintenance
Computers & Information Technology	334220	Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing
	443112	Radio, Television, and Other Electronics Stores
	511210	Software Publishers
	517110	Wired Telecommunications Carriers
	517212	Wireless Telecommunications Carriers (except satellite)
	517410	Satellite Telecommunications
	517910	Other Telecommunications
	518210	Data Processing, Hosting, and Related Services
	541511	Custom Computer Programming Services
	541512	Computer Systems Design Services
	541519	Other Computer Related Services
	811211	Consumer Electronics Repair and Maintenance
	811212	Computer and Office Machine Repair and Maintenance
	Architecture & Engineering	541310
541320		Landscape Architectural Services
541330		Engineering Services
541340		Drafting Services
541420		Industrial Design Services