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# 2004 Orange County Cluster Survey

Presented to  
The Orange County Workforce Investment Board  
January 18, 2005

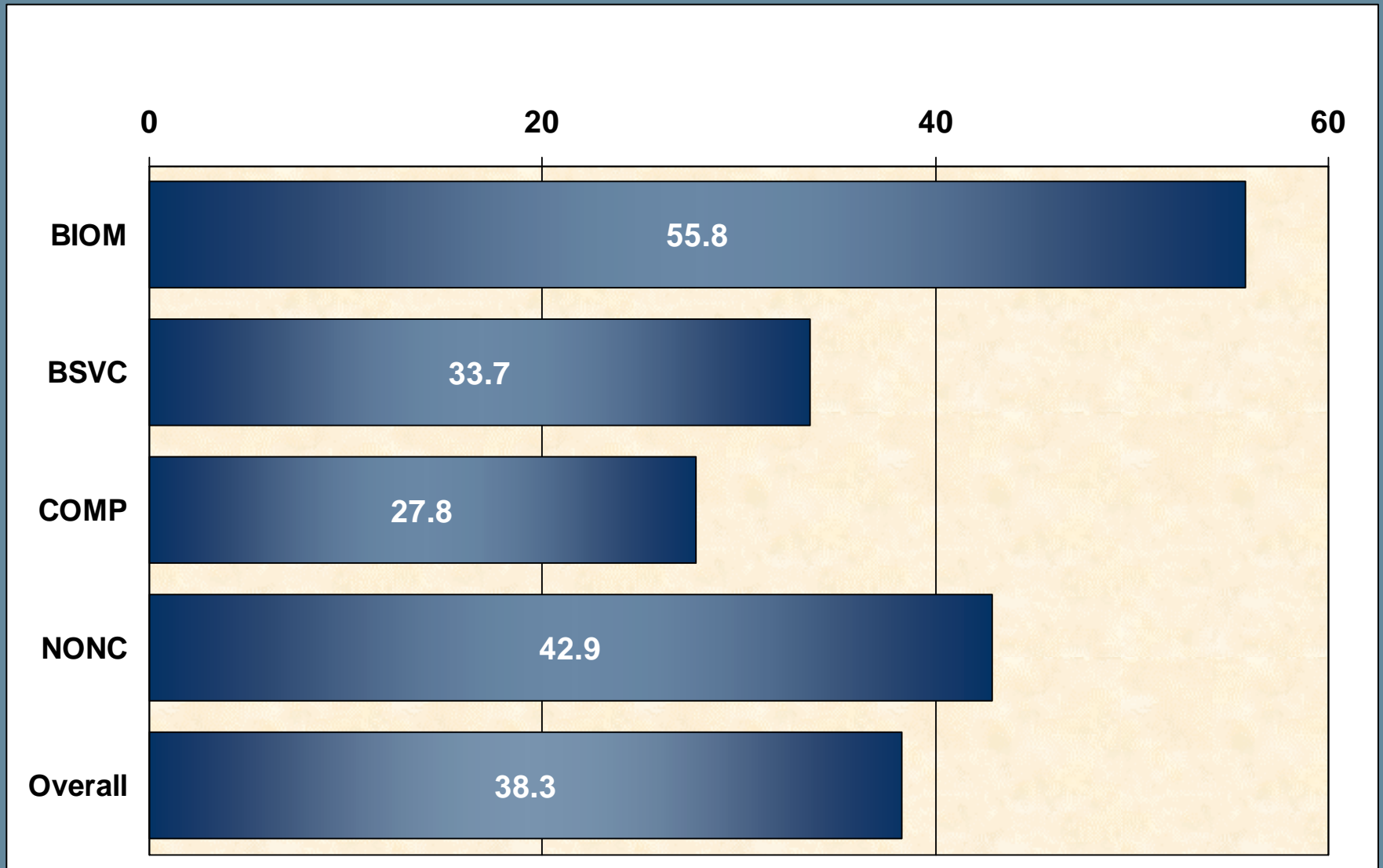
# The Three Clusters

- **Biomedical Industry (BIOM)**
- **Business Services Industry (BSVC)**
- **Computer Software/Programming (COMP)**
- **Non-Cluster (NONC)**



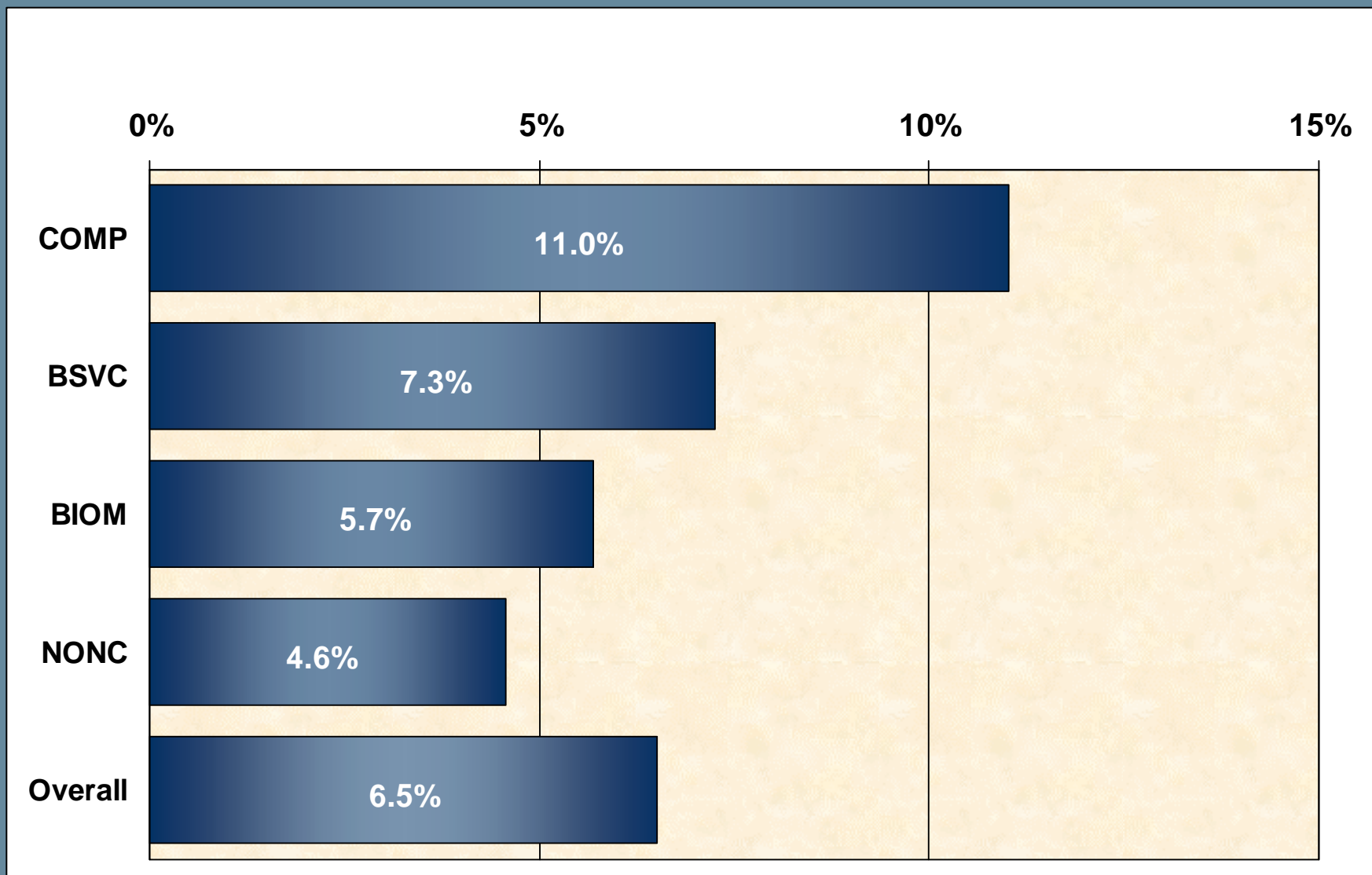
# Average Firm Size by Cluster

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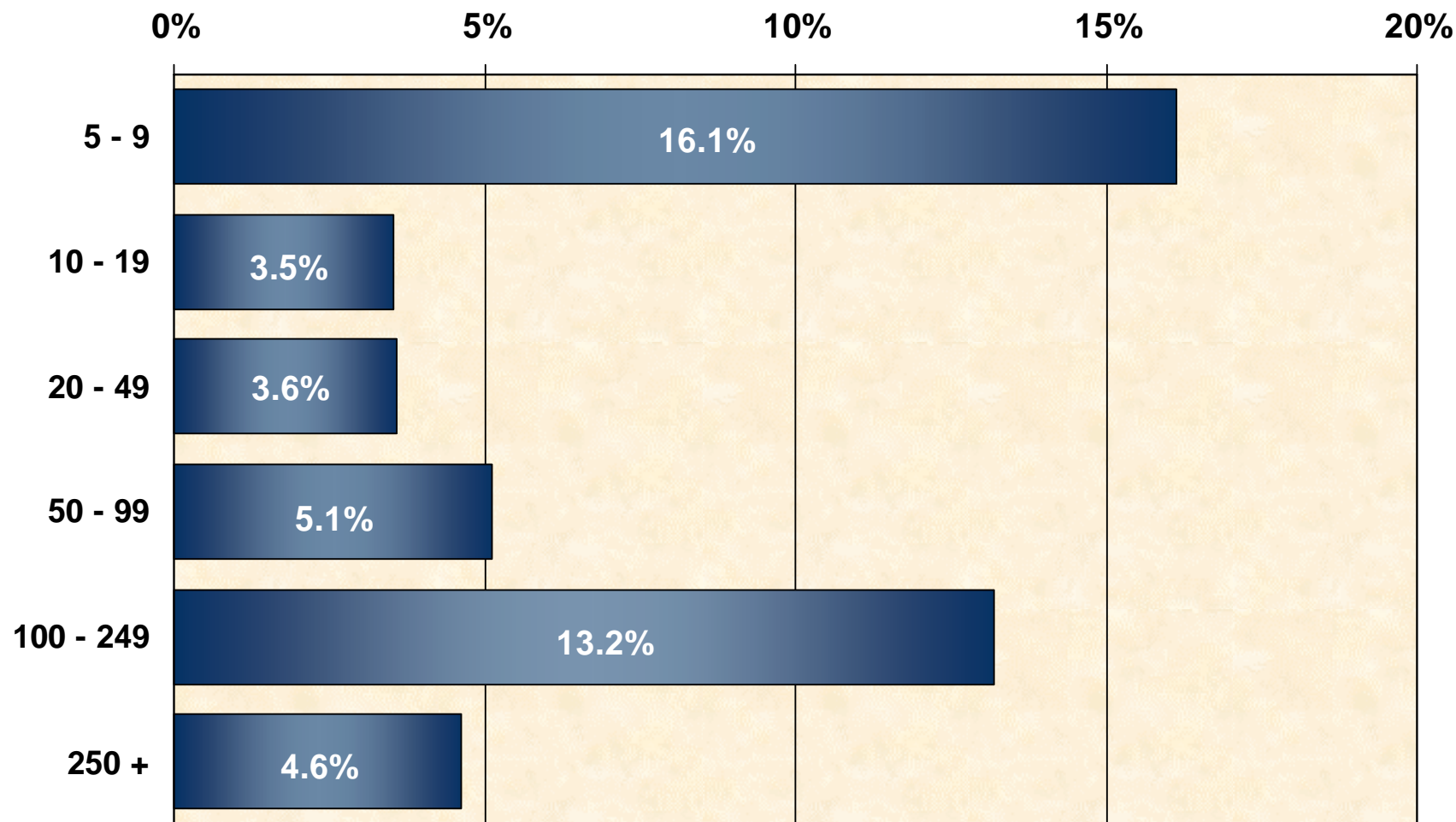
# Projected Employment Growth by Cluster

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# Projected Employment Growth by Firm Size

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# Composition of Employment

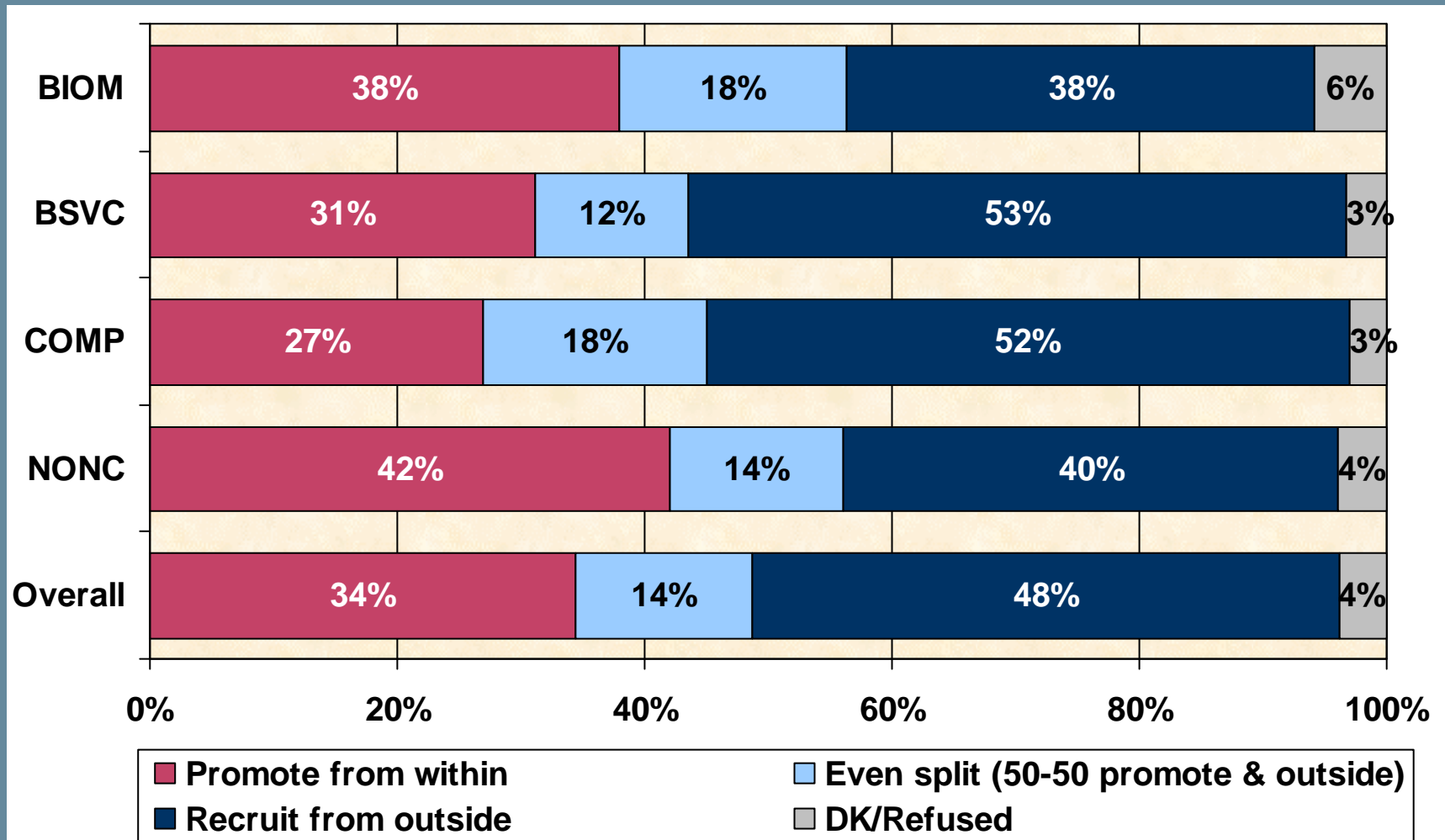
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	Full-Time Employees	Part-Time Employees	Temporary Employees	Expected Growth in Employment Over 12 Months	Expected Retirement in Next 3 Years
<b>BIOM</b>	87%	13%	13%	5.7%	2.0%
<b>BSVC</b>	86%	14%	12%	7.3%	2.5%
<b>COMP</b>	94%	6%	2%	11.0%	2.1%
<b>NONC</b>	81%	19%	15%	4.6%	2.0%
<b>Overall</b>	86%	14%	12%	6.5%	2.3%

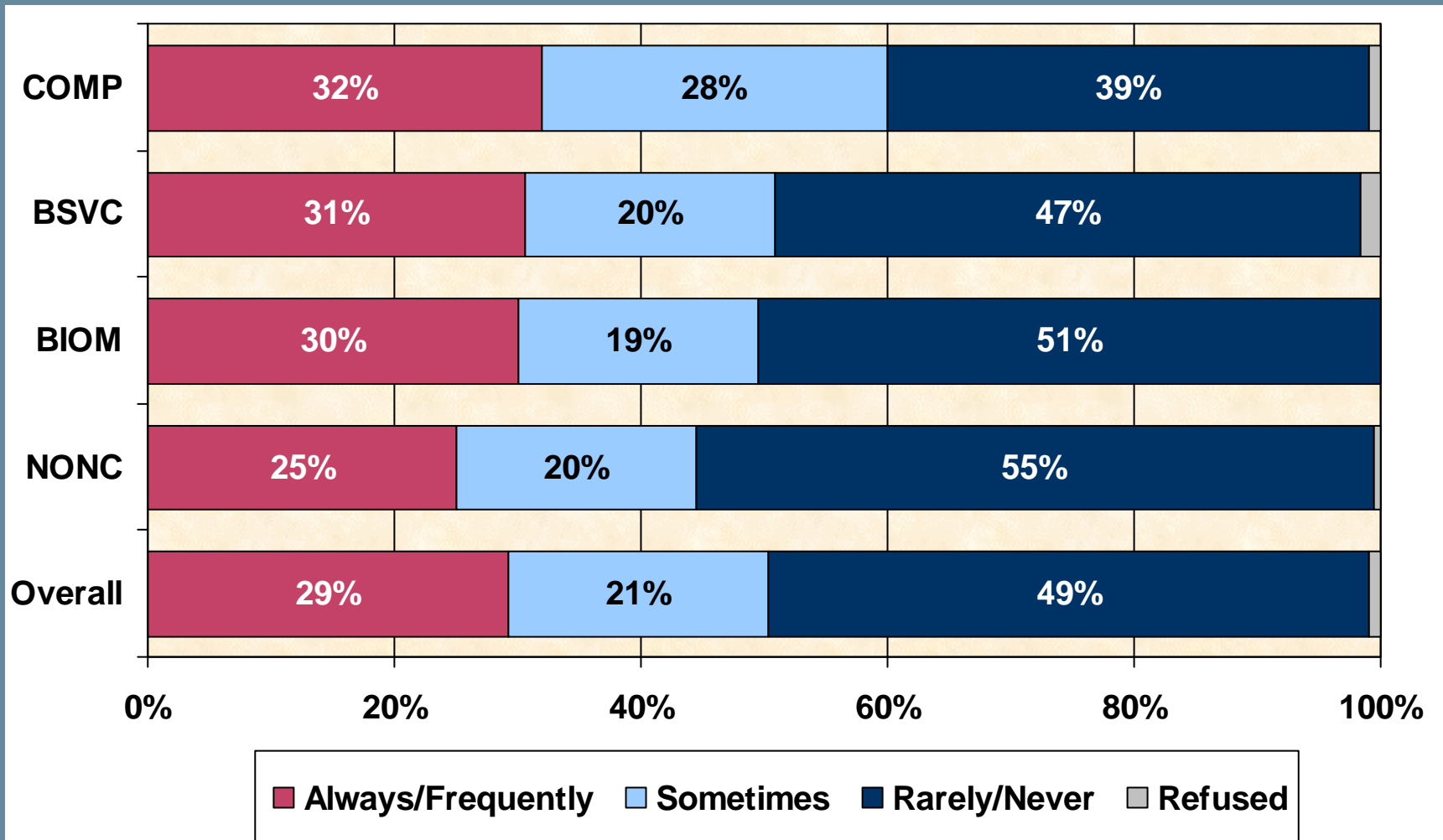


# Hiring for Non Entry-Level Positions

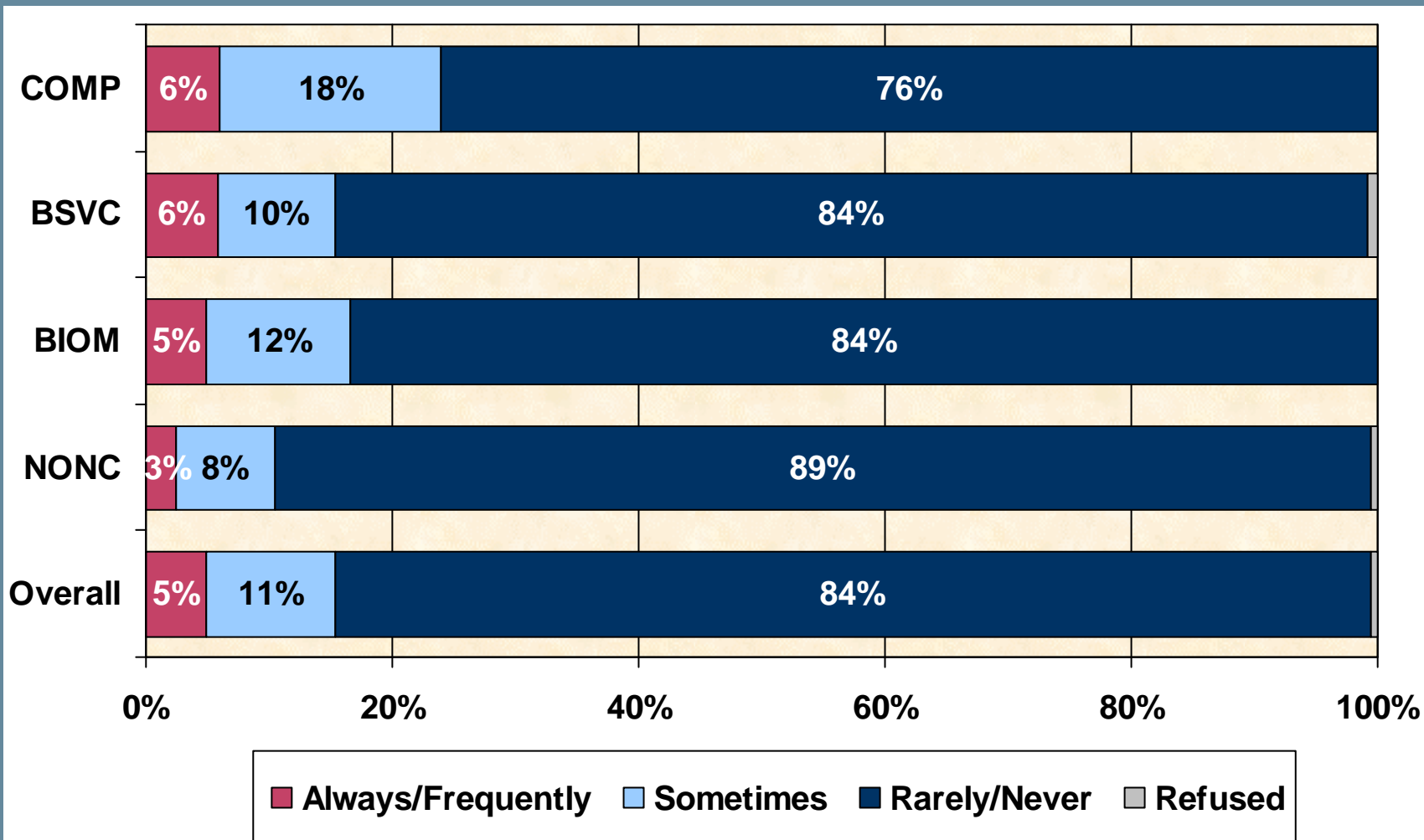
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# Frequency of Recruiting Outside of Orange County

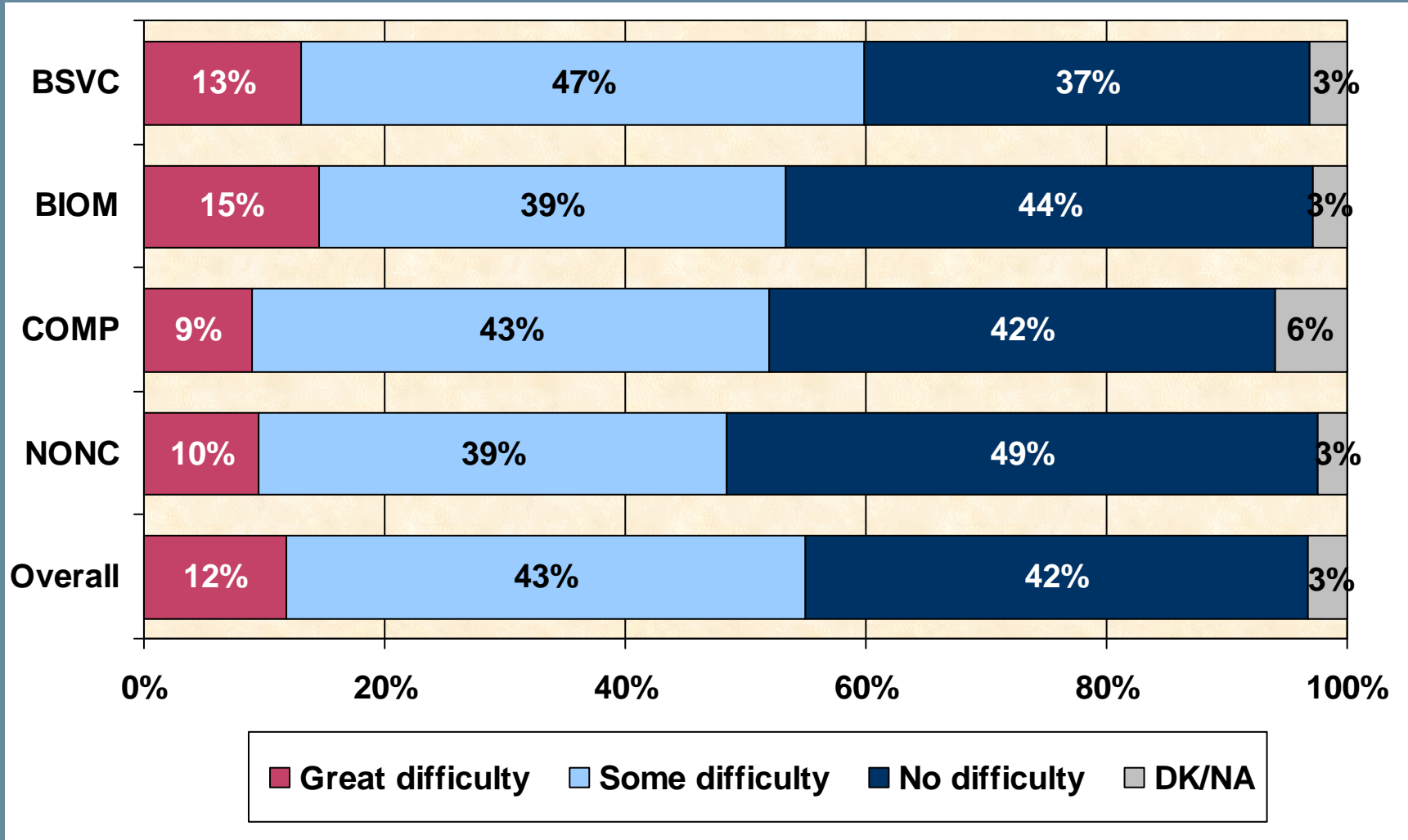


# Frequency of Recruiting Outside of Southern California



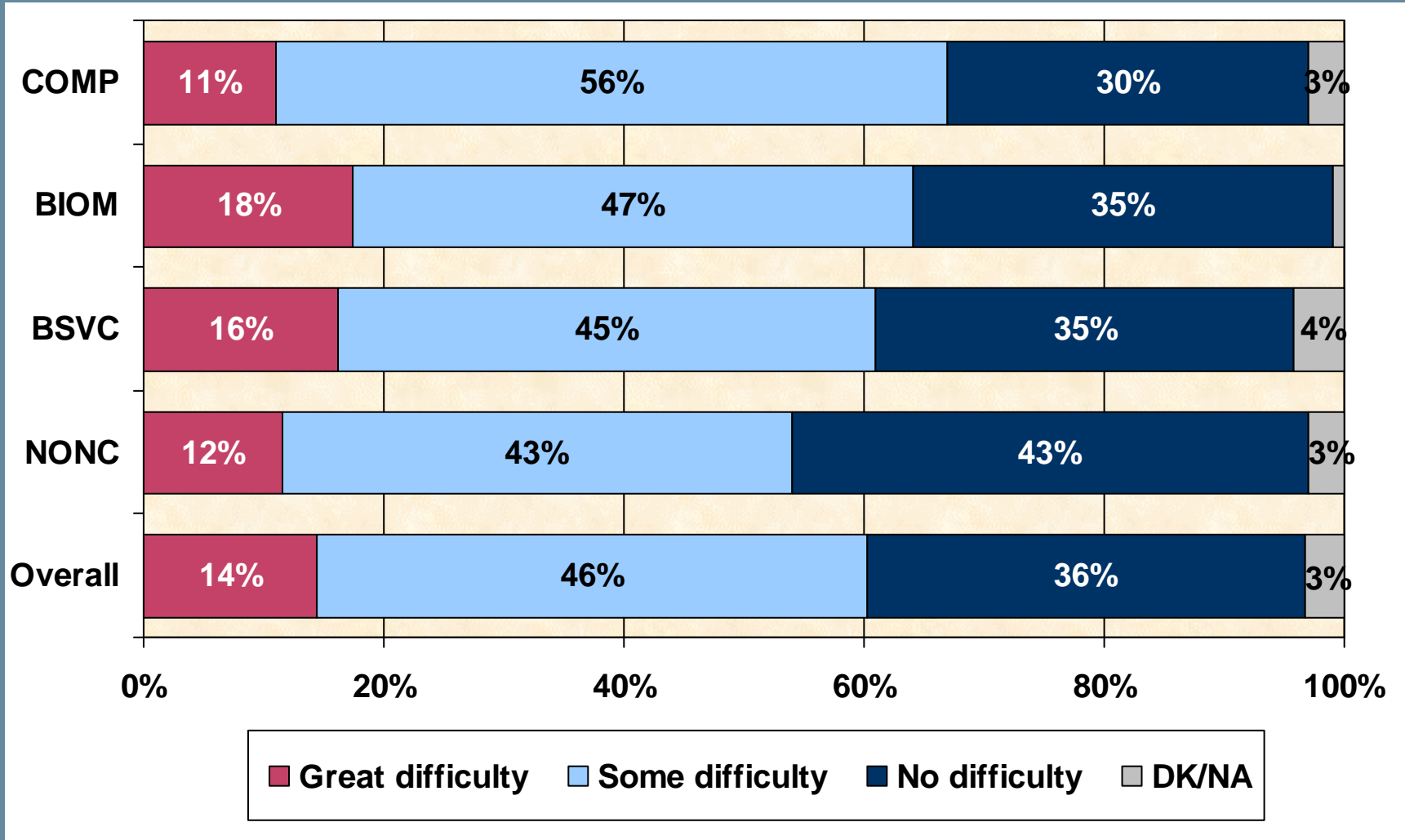
# Difficulty Recruiting Entry-Level Employees

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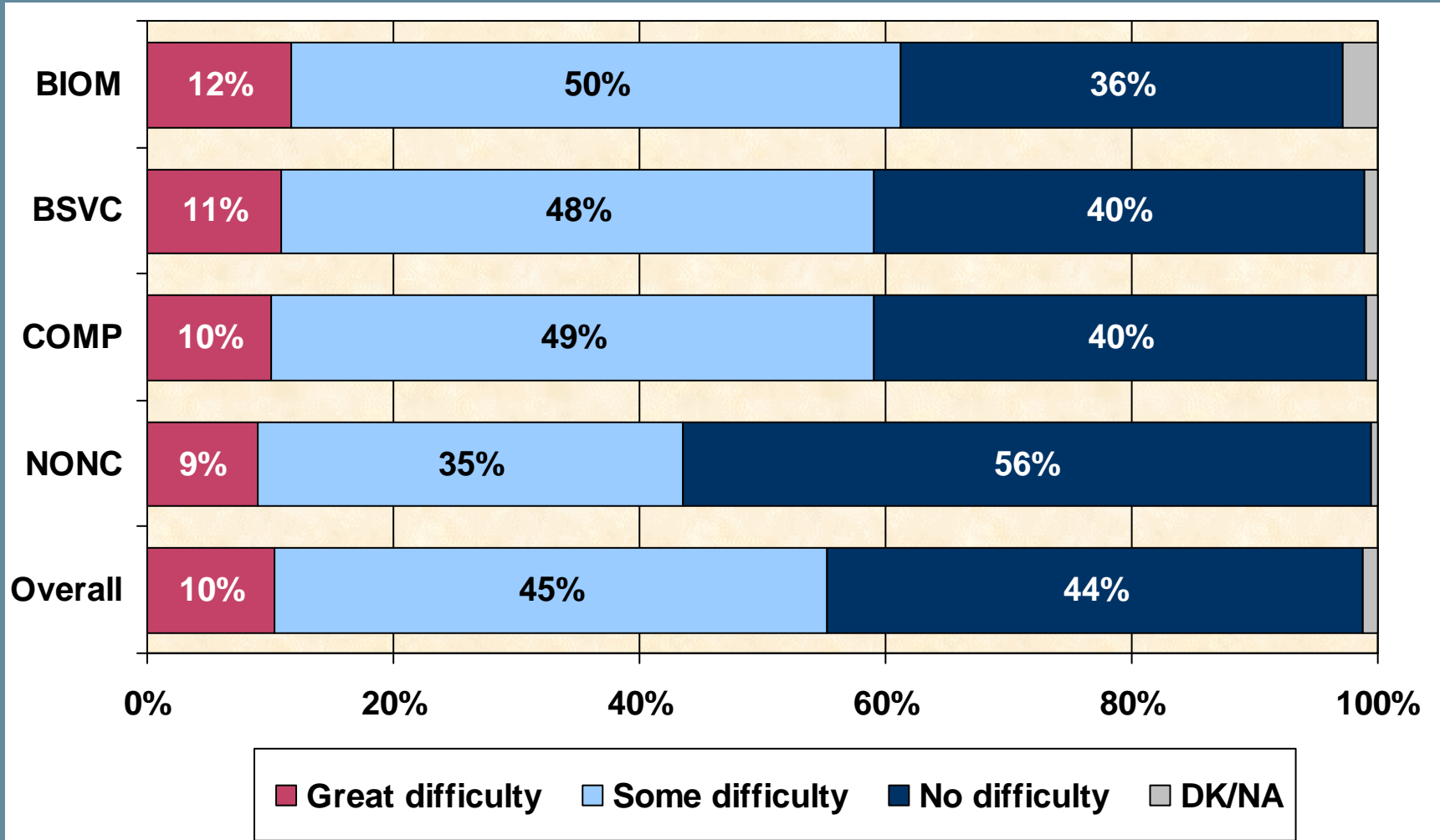
# Difficulty Recruiting Non Entry-Level Employees

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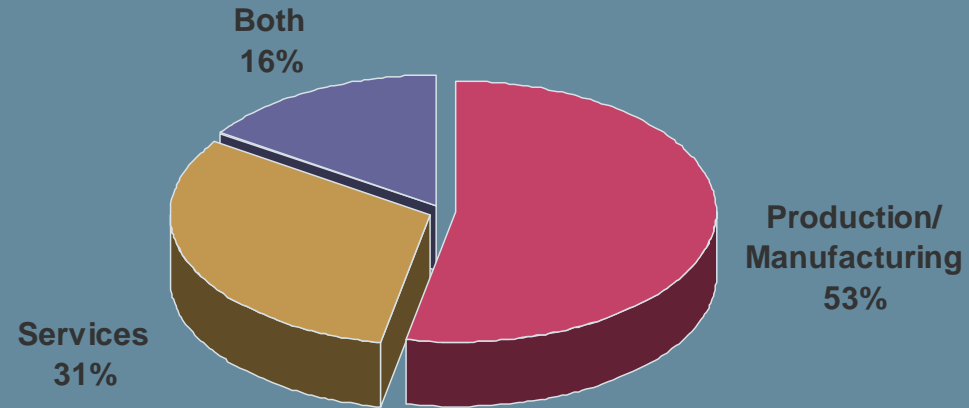
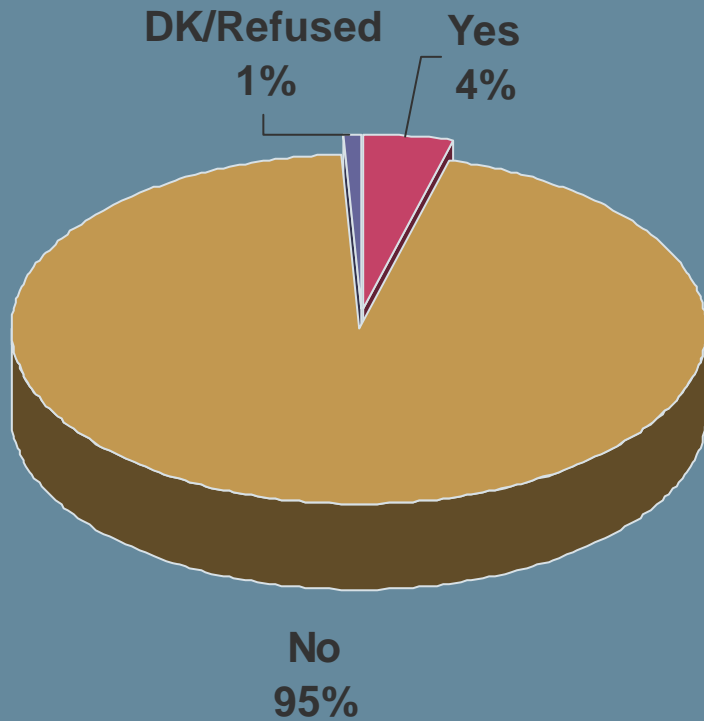
# Difficulty Recruiting Employees with Reasonable Salaries

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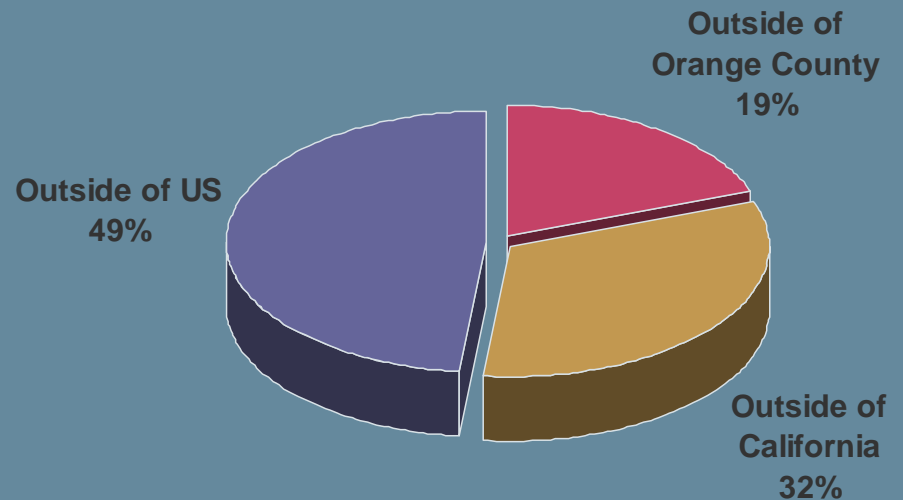


# Outsourcing from Orange County

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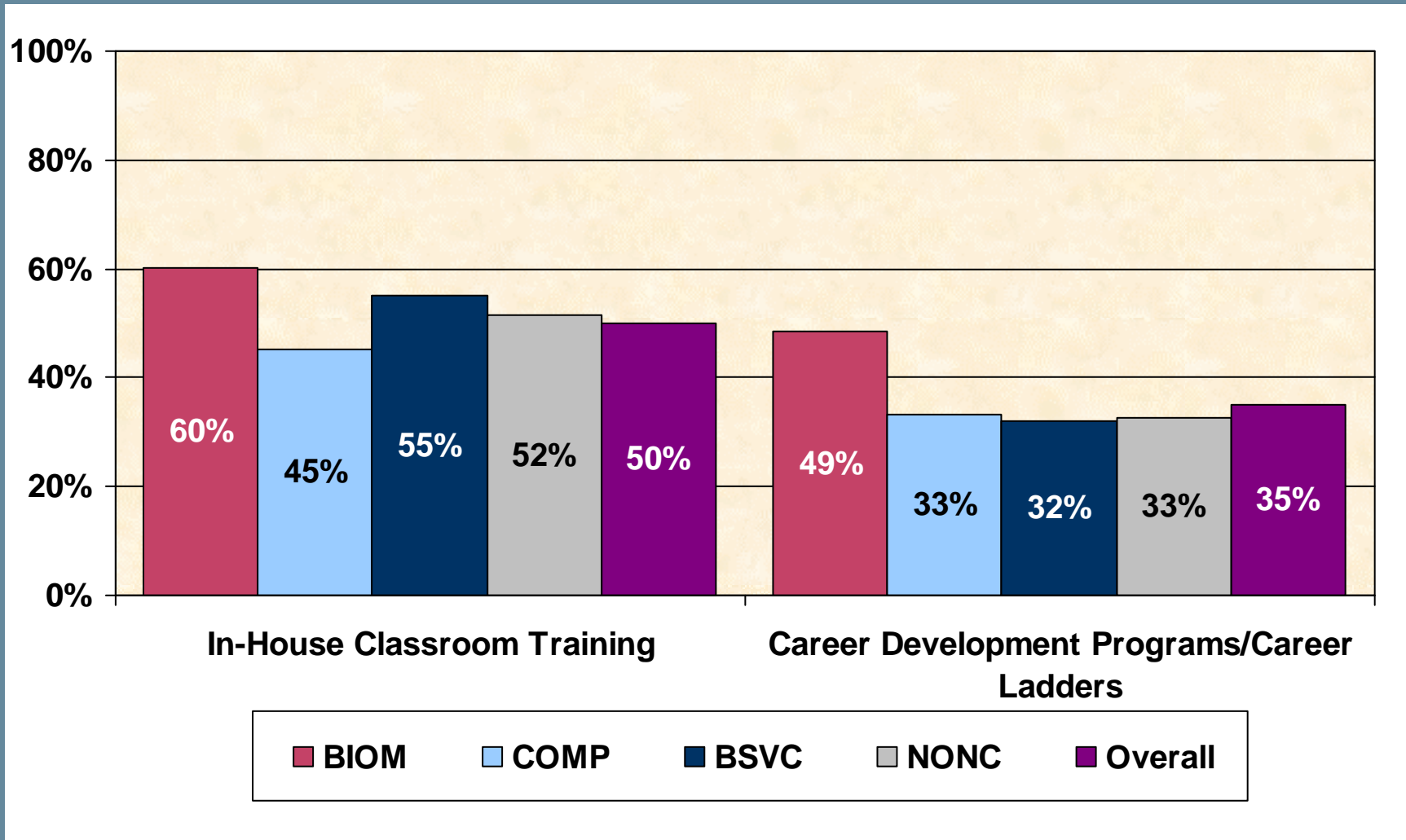


Type of Business Process (n = 32)



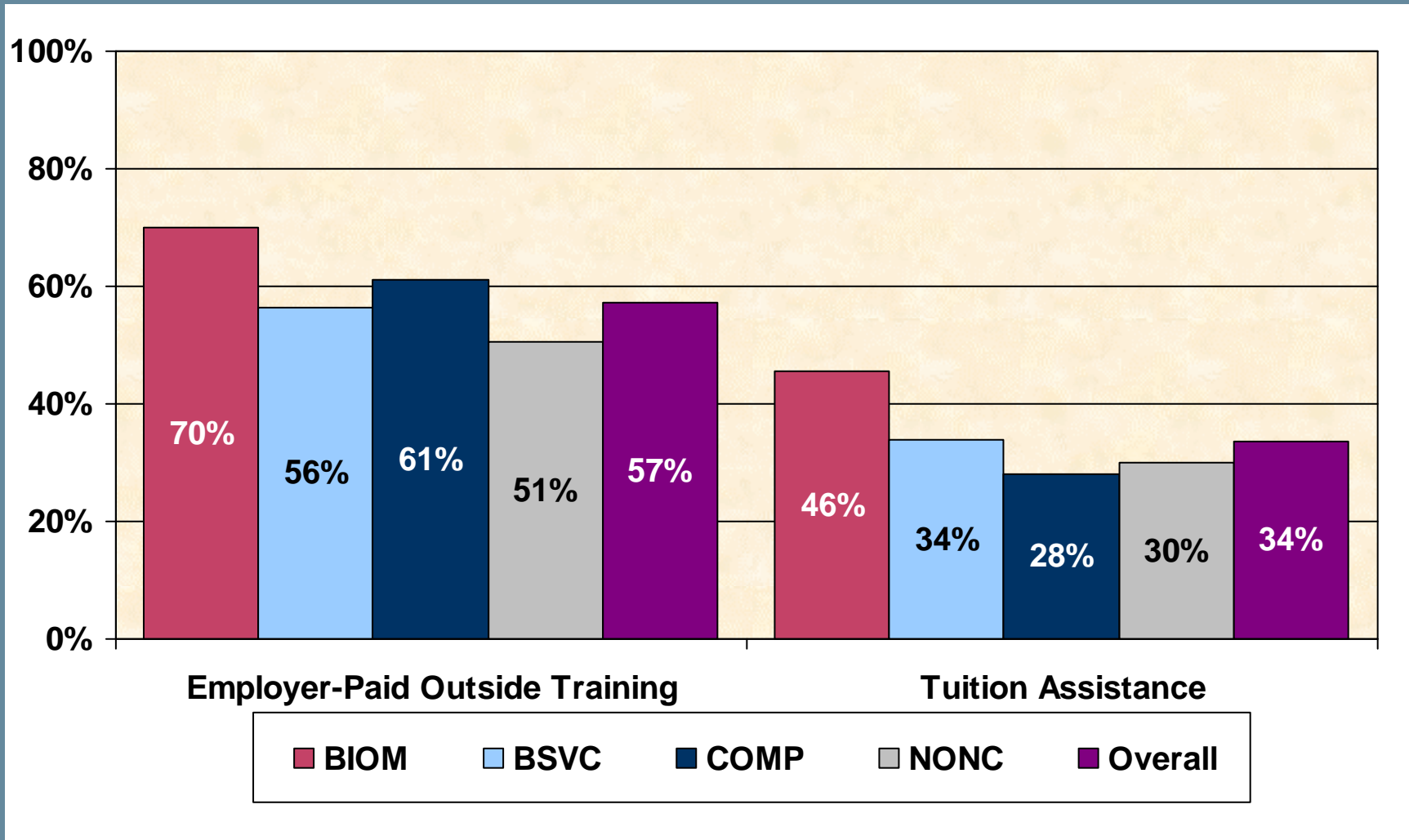
Location of Outsourcing (n = 31)

# Employee Development Practices



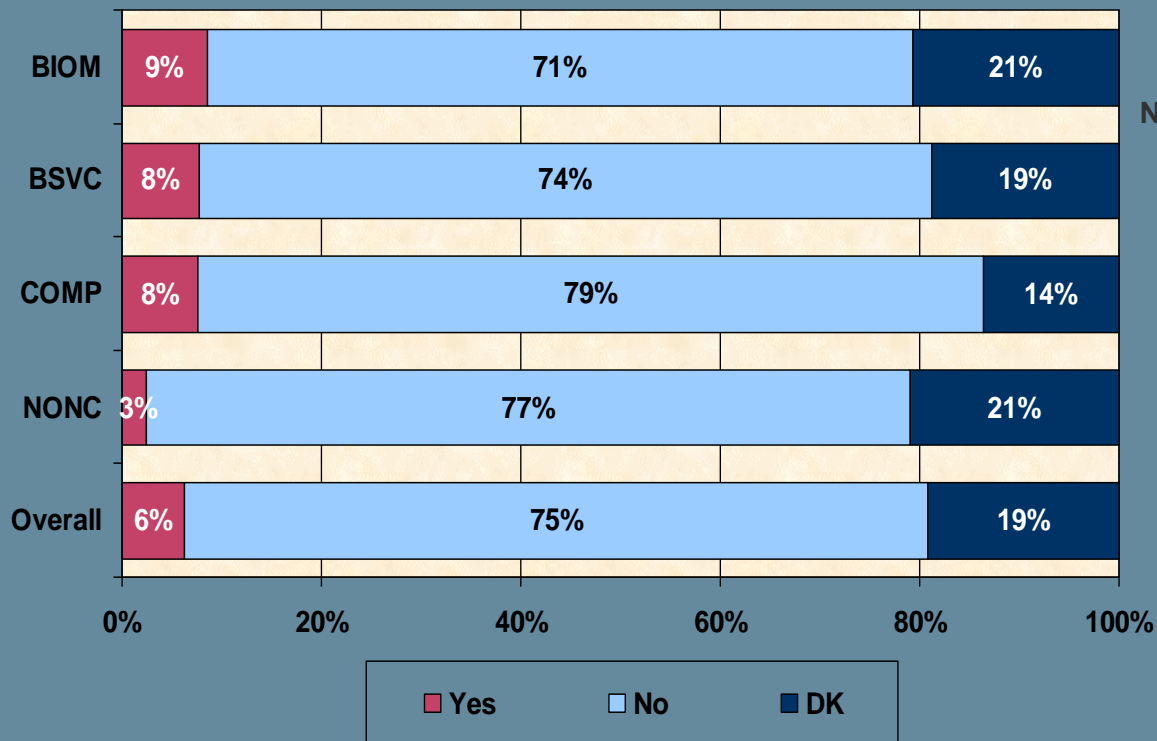
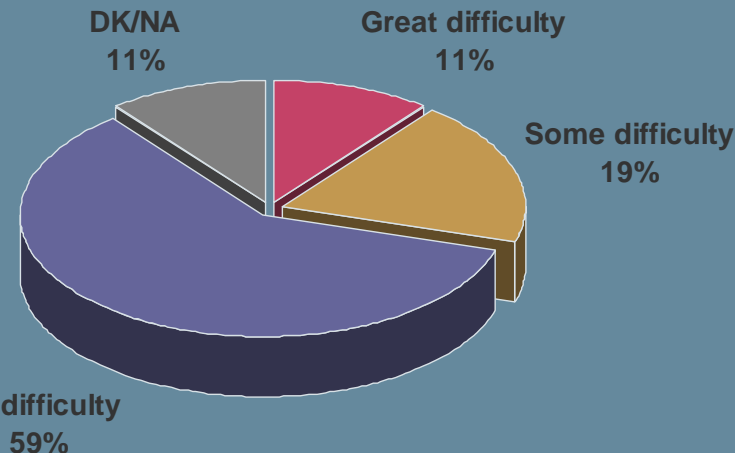
# Employee Development Practices

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# Use of GIS

### Difficulty Finding Employees with GIS Skills (n = 47)



# Occupations in Demand

**Employers had the most difficulty finding qualified**

- **Physical Scientists (BIOM)**
- **Chemists (BIOM)**
- **Software Engineers (COMP)**
- **Sales Representatives (BSVC)**
- **Market and Survey Research Analysts (BSVC)**

**As a cluster, COMP had high growth expectations for across all occupations, including those with relatively higher pay and higher educational requirements such as Software Engineers (14%) and Software Programmers (15%)**

- **Technique** Telephone Interviewing
- **Interview Length** 20 to 30 Minutes
- **Universe** Orange County firms in one of three clusters as well as firms from outside of the clusters with at least five employees
- **Field Dates** August 26 – September 22, 2004
- **Sample Size** n = 762



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