



# **Preliminary Feedback Regarding County Promotional Materials**

**September 2015**



*Elliott D. Pollack & Company*



PINAL COUNTY

# Agenda:

- **Project Status Update.**
- **Solicit Feedback.**



# Immediate Documents:

- Pinal County Summary marketing document (higher image quality, like a brochure).
- Pinal County Marketing and Economic PowerPoints (to be maintained during year; used by staff and Board).
- Longer marketing document if needed (between a brochure and a report).
- Alternatives (multiple short marketing documents depending on situation).



# Content:

- Tax profile compared to competitors (backup materials!)
- A “To the Point” statistics profile.
- A “To the Point” social profile.
- A “Getting on Airplane” profile.
- Business feedback/recent locations.
- Pinal rankings (early on just go for volume).



# Confidential Business Location Docs:

- Start more generic then adjust for each industry/type of business (like a resume).
- Top factors that appear on many initial comparison lists: (often comparing multiple sites; need to hit on as many as possible).
  - Labor Force Cost and Quality (cost effectiveness).
  - Construction Costs.
  - Local Taxes (sales, equipment, real estate, etc.).



# Confidential Business Location Docs: (Cont.)

- Population size (now and forecast).
- Employment base (now and forecast).
- Employment skill and size measure for target industry.
- Infrastructure issues (road and utilities).
- Incentives.
- Others arise as well/more may be added as research continues.



# Examples by Type...



# To the Point... Data

## Charlotte USA



### Contact Information:

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*To THE POINT!*

Total Population	2,754,985
Total Households	1,058,729
Median Age	37.5
Projected Population in 2019	2,929,521

Source: ESRI, 2014

### Educational Attainment, 2014

Population 25 and Older	1,835,326
High School Diploma	26.8%
Some College	21.7%
Associate's Degree	8.6%
Bachelor's Degree	19.5%
Graduate or Professional Degree	8.7%

### Income, 2014

Median Household Income	\$50,389
Per Capita Income	\$26,842

### Employment by Industry, 2014

Agriculture, Mining	.7%
Construction	6.7%
FIRE	9.1%
Manufacturing	13.5%
Public Administration	2.6%
Retail Trade	11.4%
Information	1.7%
Wholesale Trade	3.1%
Services	45.9%
Transportation, Utilities	5.3%
Total Employment, 16+	1,294,658

### Labor Force, 2014

Labor Force	1,357,803
Unemployment Rate (Jan. 2015)	5.7%

Source: ESRI 2014, NCSC Employment Security Commission

The Charlotte Region is home to over 2.7 million people living in sixteen counties in two different states: 12 counties in North Carolina and 4 in South Carolina. It is strategically located in the center of the East Coast, and the importance of this Eastern time zone location cannot be overestimated. For example, within 2 hours' flight time or one days' delivery by motor freight, businesses in the Charlotte USA region can reach over 60% of the population of the United States and more than 60% of the nation's industrial base.

Charlotte USA is very well connected to the global economy. More than 1,800 foreign-owned companies employ more than 350,000 people in the two Carolinas, and more than one-third of these are located in the Charlotte region. There are more than 20 German-owned companies in the Charlotte region, which depends upon a major international airport for quick and convenient access to the global economy. As a result of direct flights to major international hubs such as Frankfurt, London, Munich, Paris, Rome, Rio de Janeiro and Sao Paulo as well as numerous locations in Canada and Mexico, the Charlotte region is at most one plane change away from any important business destination in the world.

The Charlotte region's economy draws its strength from its remarkable diversity. Charlotte USA has emerged as the 2nd largest banking and financial center in the United States, second only to New York City. Charlotte USA is also home to the world headquarters of eight Fortune 500 companies, most of which are outside the financial sector and in varied industries such as energy, retail and manufacturing. These companies include Lowe's, Nucor, Duke Energy and Sonic Automotive among others.

The Charlotte region is also determined to preserve its exceptional quality of life. In the global economy, where anything can be made and sold anywhere on the globe, businesses will increasingly locate and expand their operations in places where their employees like to live and work. With its numerous theaters, professional sports teams, and prime location 2 hours from the mountains and 3 hours from the beach, the Charlotte region is ranked the Best Place to Live in the United States.



### MAJOR EMPLOYERS (non government/retail)

Company	Major Product	Employees
Carolinas HealthCare System	Health care provider	35,000
Wells Fargo	Financial services provider	22,100
Bank of America	Financial services provider	15,000
Lowe's Cos. Inc.	Home-improvement retailer	12,960
American Airlines	Airline	9,900



# To the Point... Data

## Charlotte USA



Announced Jobs & Investments	
Jobs announced, 2014	18,878
Total investment announced, 2014	\$3,303,142,744
<small>Source: Charlotte Regional Partnership, NC and SC CRI 2014</small>	
Accessibility	
Nearest Commercial Airport	Charlotte Douglas
Interstates	I-77, I-85, I-40
Foreign Trade Zone Accessibility	Yes #57
Population within 150 mile radius, 2014	13,452,467
Education	
School Districts	29
Colleges & Universities	37
University of North Carolina, Charlotte Enrollment	27,320
Central Piedmont Community College Enrollment	75,000 (6 campuses)
Climate	
Annual Mean Temp.	59.8F
Annual Mean High Temp.	70.8F
Average 2014 Total Earnings for Charlotte USA Region	
Utilities	\$92,715
Construction	\$48,800
Manufacturing	\$52,301
Wholesale Trade	\$61,132
Retail Trade	\$28,037
Transportation & Warehousing	\$47,995
Information	\$79,645
Financial Activities	\$98,392
Professional & Business Services	\$72,459
Management of Companies & Enterprises	\$118,048
Health Care and Social Assistance	\$43,592
Average Yearly Wage	\$48,597
<small>Source: EMSI 2014, 4th Quarter Data</small>	

Type	North Carolina	South Carolina
Corporate Income Tax Rate	5%	5%
Sales & Use Tax	4.75% statewide Local rate of 2%-2.5%	6% statewide Local rate of 1%-2%
Corporate License Fee / Franchise Tax	\$1.50 per \$1,000 and is applied to the greatest base. Min. is \$35.	\$1.25 per \$1,000 Min. is \$25.
Inventory Tax	None	None
Personal Income Tax	5.75% (1 bracket)	3.0%-7% (5 brackets)
Property Tax	No state property tax. Locally assessed per \$100 of 100% assessed value.	No state property tax. Local rates based on millage rate multiplied by assessment ratio (6%-10.5%)
Manufacturing Fuels Sales Tax	None	None
Electricity Sales Tax	7.0% unless sold for qualifying manufacturing industries (exempt)	None
Natural Gas Sales Tax	Sales of piped natural gas to manufacturers are exempt	None
Telephone Service Sales Tax	Telecom/cable/satellite services combined rate of 7.0%. \$50,000 cap for call centers.	Sales tax exemption for long distance services, including 800 numbers.
Workers Compensation	\$1.85 per \$100 of covered wages	\$2.00 per \$100 of covered wages
Unemployment Insurance	Average Rate: \$27.49 Employers Rate: 1.2% to 6.8% Taxable Base: \$21,700 per employee	Average Rate: \$252.75 Employers Rate: 3.4% to 6.1% Taxable Base: \$7,000 per employee

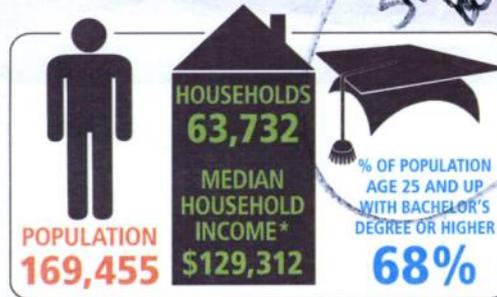


# To the Point... Simple

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## Fairfax County Area Profile Tysons Corner including McLean, Town of Vienna, Great Falls

### POPULATION PROFILE



\* Average of the median incomes for the combined census designated places within the market

Sources: Fairfax County Department of Housing and Community Services, Housing and Population Estimates 2013, American Community Survey (ACS) 2012 Five-Year Estimates

### NUMBER OF FIRMS BY SIZE



Source: U.S. Census, Bureau County Business Patterns 2012

### ECONOMIC BASE

Industry	Jobs	Share
Professional, Scientific, and Technical Services	43,525	35.5%
Retail Trade	12,900	10.5%
Management of Companies and Enterprises	11,366	9.3%
Finance and Insurance	9,497	7.8%
Accommodation and Food Services	8,754	7.1%
Administrative and Support and Waste Management	7,234	5.9%
Educational Services	6,240	5.1%
Health Care and Social Assistance	6,083	5.0%
Information	3,503	2.9%
Other	13,353	10.9%
<b>Total</b>	<b>122,455</b>	<b>100.0%</b>

Sources: Virginia Employment Commission, Second Quarter 2013, and Fairfax County Public Schools

**JOBS IN PROFESSIONAL SCIENTIFIC AND TECHNICAL SERVICES DOMINATE IN THE TYSONS CORNER AREA.**



### EMPLOYEE BASE

Workers' Age	Jobs	Percent
29 or younger	34,750	23.5%
30 to 54	87,006	59.0%
55 or older	25,756	17.5%

Source: U.S. Census Bureau, Local Employment Dynamics 2011



# To the Point... Social

## THE COLUMBUS REGION



- The Columbus Region**
- 11-county metropolitan area located in Central Ohio
  - Population: 2 million
  - 1.3 percent annual population growth rate
  - 2nd fastest growing metro area in the Midwest
  - Home to more than 600 internationally owned companies
- Columbus**
- Ohio's capital and largest city
  - 15th largest city in the U.S.
  - Located at the heart of the largest concentration of population and economic activity in North America

### \$ COLUMBUS: LOW TO HIGH

The cost of doing business in the Columbus Region is far lower than the national average — the benefits, far greater.

- Low**
- Cost of living
  - No inventory tax
  - No personal property tax
  - No state income tax
  - Operation cost
  - Real estate
  - Unionization rate
  - Utilities
  - Wages

- High**
- Educated talent pool
  - Growth potential
  - Production rate
  - Qualified workforce
  - Quality of life
  - Research investment
  - Success rate

*TO THE POINT OF "SOCIAL"*

### WORKFORCE & TALENT

- Qualified** - More than 1 million potential contributors at a median age of 35 and a higher percentage of degrees than the U.S. average
- Productive** - 52 percent increase in manufacturing productivity (output per worker) between 2001 and 2012
- Growing** - The Columbus population is growing at a pace above the national average

### EDUCATION

- Scholastic Region** - Home to more than 63 college and university campuses with a total enrollment of more than 140,000 students
- The Ohio State University** - With 170 undergraduate majors and more than 250 master's, doctoral and professional degree programs, The Ohio State University provides the Region with a diverse and talented workforce for the future
- Columbus State Community College** - The largest community college in Ohio and among the largest in the nation, offering associate degrees in automotive technology, aviation maintenance, business management, civil engineering, information technology, electro-mechanical engineering, electrical engineering and numerous other fields

### RESEARCH

- The Ohio State University is No. 2 in industry-sponsored research. Nearly \$750 million is spent annually for research at Ohio State.
- Columbus has the lowest effective tax rate for new R&D facilities.
- Home to Battelle and Chemical Abstracts Service**, two of the world's leading private-research institutions



- Connect to more of the U.S. and Canada**
- By Air:** Port Columbus International Airport - 140+ daily flights to 32 destination airports
- Rickenbacker** - International cargo-dedicated airport for easy flow of goods
- By Rail:** Enhanced freight connections to major East Coast Ports (Baltimore, MD, Norfolk, VA, Wilmington, NC)
- By Road:** 10-hour drive to: 33% of Canadian population, 46% of U.S. population, 47% of headquarters operations

Region's transportation infrastructure allows for **COST-EFFECTIVE DELIVERY** anywhere, anytime.

**Home to Foreign Trade Zone #138:** Six pre-designated Magnet Sites that can provide FTZ designation to any site located within a 25-county service area in Central Ohio

FAST-GROWING EMPLOYERS

JPMorgan Chase & Co.	20,475	Battelle	2,201
Nationwide Mutual Insurance Co.	11,085	Agilent Resolution	2,200
Honda of America Mfg., Inc.	9,433	TS TECH Co., Ltd.	2,079
L. Brands, Inc.	7,800	Exel Inc.	1,800
The Kroger Co.	5,281	Emerson Network Power	1,800
Huntington Bancshares Incorporated	4,855	Tony Stewart Cable, Inc.	1,776
Cardinal Health, Inc.	4,384	Teleperformance	1,682
American Electric Power	3,118	United Parcel Service, Inc.	1,622
PNC Financial Services Group, Inc.	3,000	Discover Financial Services, Inc.	1,581
Abraxa BioScience, Inc.	2,650	Kilgus Construction Company, Inc.	1,465
Equifax	2,441	Grant Stagle, Inc.	1,394
Axiant Data Systems Corporation	2,374	State Farm Insurance	1,308
Whirlpool Corporation	2,250		



# Next Steps:

- Field Trip with Staff – Business feedback, landowner feedback, infrastructure discussion, blend BOS feedback, etc.
- Io, Inc. (Ioanna Morfessis).
- Produce Pinal County Summary “Brochure” with high quality imaging and printing.
- Produce PowerPoint (speech) templates.
- Work with Staff to set up process for maintaining strategic info.
- Modify document to meet specific needs – TDB
- Produce longer form “Marketing” document - TBD



# Questions?

