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# Competitive Analysis of Select States

## Key Findings and Insights

PREPARED FOR:



MICHIGAN ECONOMIC  
DEVELOPMENT CORPORATION

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# Overview and Methodology

On behalf of the Michigan Economic Development Corporation (MEDC), Development Counsellors International (DCI) conducted a competitor audit and analysis in order to profile select state economic development marketing programs. A combination of interviews and secondary research was conducted in order to obtain information from a total of six states (California, Ohio, Georgia, Indiana, Illinois and Texas) including:

- Organizational structure
- Objectives/Metrics
- Target Audiences and Key Messaging
- Campaigns and Tactics
- Digital Presence

Based on this analysis, best practices and common themes were identified. DCI's key findings are provided below followed by a comprehensive profile of each state-level organization.

## Key Findings

Based on DCI's analysis, several key themes emerged on best practices among the economic development organizations (EDOs) profiled.

- 1. Economic development marketing efforts focused on accelerating private sector growth must have significant private sector involvement or be led by the private sector.** For a variety of reasons, state economic development organizations (EDOs) are focused on fostering relationships with existing businesses not least of which is to capitalize on the expansion opportunities offered by these companies. It is commonly understood that it is easier to hold on to existing companies than recruit new employers. Additionally, EDOs are relying more than ever on the private sector to partner with them on strategic business retention or attraction initiatives and to contribute private sector resources.
  - The Georgia Department of Economic Development (GDEd) implemented the *Real Companies, Real Executives, Real Success* campaign – an example of letting the companies speak for themselves and touting the advantages of Georgia as a business location.
  - Indiana believes in having “boots on the ground” in five regional offices across the state that works closely to maintain communication with existing employers and respond to their needs.
  - The Texas Economic Development Corporation (TxEDC) is overseen by an eight-member Board of Directors comprised of business leaders, economic developers and higher education representatives, all appointed by Texas Governor Greg Abbott. The organization is made possible through the support of a broad range of organizations, Fortune 500 companies and privately-held enterprises throughout the state.
  - One of the goals of JobsOhio is to run the organization “like a business” with significant input from Board of Directors (made up of private sector leaders).
- 2. Digital marketing is more nimble and allows expedited “course corrections”.** Among the state EDOs evaluated, all report a continued shift in resources devoted to digital campaigns.

- TxEDC is ramping up their digital advertising and paid social efforts to get their new brand and videos seen by the right audiences. Digital campaign targets specific geographies, industries and executive titles.
- JobsOhio's digital marketing approach is based on delivering relevant content over time to reinforce messaging and continuing to bring leads further down the funnel through programmatic digital advertising to target the right audience (C-suite and location advisors), track web traffic and continuing to serve up relevant Ohio messages based on their search and viewing habits. Also employs an automated email campaign delivering customized messaging by industry audience.
- GDEcD has shifted much of budget previously dedicated to print buys to digital advertising and this allows the organization to pivot more quickly and adjust/update messaging. They are continuing to effectively use video content to tell success stories to potential clients and visitors including the creation of a new Chinese language video aimed at prospective Chinese FDI and trade projects. This will be supported by a digital ad buy to ensure video is seen in select China markets. Similar video content will be developed for Korean and German prospects.
- Intersect Illinois is launching a new website to emphasize state's key technology and talent assets.
- Indiana's "A State that Works" campaign include ads on the internet and mobile platforms and are geo-targeted to a particular city. They display messages that compare quality-of-life factors in the various markets.

**3. Focusing outreach on location advisors and thought leaders in target industries expands the reach of your message.**

When thinking about the return on investment of outreach to select audiences, it was agreed that forming relationships with location advisors and thought leaders in your state's target sectors should be a top priority due to the multiplier effect. While capturing the attention of location advisors is a key goal of all interviewed organizations, a less-obvious audience is thought leaders including media, industry spokespeople, associations, industry conference organizers or any other groups or individuals that are perceived to have an extensive reach and authority in a particular industry. Outreach to thought-leaders is also achieved through participation in key industry events.

- Numerous states emphasized developing relationships with site selectors on a one-on-one basis through in-person meetings during missions and familiarization tours. Familiarization tours were one tactic that has proven to a highly successful marketing technique. Intersect Illinois has metrics that demonstrates a much higher likelihood of landing projects if an influencer or executive experiences the state first hand.
- Georgia (through Georgia Allies) conducts red-carpet tours and quarterly mailings with state-made products. The state has a multi-channel marketing strategy (events, direct mail, web, earned media and traditional advertising) for targeting site consultants and company executives.
- As Intersect Illinois scales up, the organization has a measured but comprehensive strategy in place. Personal one-on-one visits to site selectors are a priority starting in Chicago followed by 3 domestic missions across the U.S. (with the highest concentration of advisors and corporate executives). This will be followed up with a strong digital campaign.

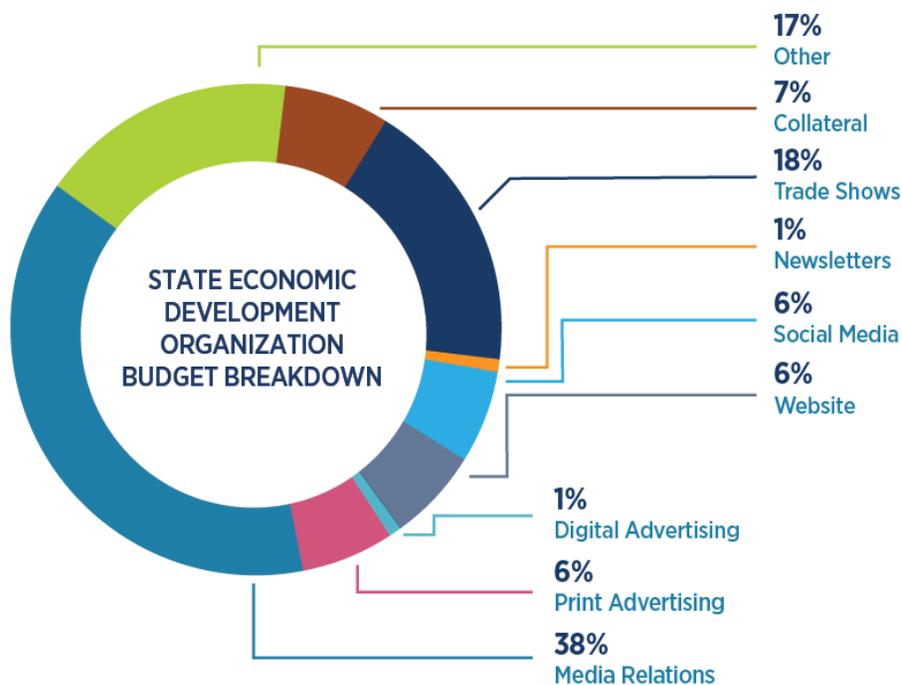
**4. Strong marketing partnerships between state and regional EDOs are critical.** Those states considered "best in class" focus heavily on developing, maintaining and utilizing a regional network of EDOs. These organizations offer multiple opportunities for networking and information sharing. The state EDOs also rely on the regional EDOs to serve as an extension of the state in BRE and talent attraction efforts. When these partnerships are in place, there is much greater consistency in messaging.

- A top strength of GDEcD based on feedback from site selectors and corporate executives has been their “team sport” mentality. GDEcD refers to this as “wheel” marketing – the hub is the state and the regions are the spokes each telling their own story but with unified key messaging.
  - JobsOhio has also fostered a strong regional network of EDOs. Prior to 2011, regional groups worked very much in silos but now work as a network with regular opportunities to share best practices and collaborate on projects.
  - In pursuit of its mission, TxEDC works closely with a statewide network of economic development partners to develop consistency in messaging.
5. **Effective marketing efforts requires flexible resources.** Interviewed state EDOs recognize that discretionary funds are critical to effectively communicate with location advisors and corporate executives and this has impacted how these organizations are structured.
- In 2011, JobsOhio was privatized to provide greater flexibility in responding to companies and devote more unrestricted resources to business attraction and retention efforts.
  - TxEDC is funded through tiered level contributions by businesses and economic development organizations committed to the promotion of economic growth, investment and job creation in the state of Texas. Annual commitment levels ranging from \$3,000 to \$250,000 offer an array of benefits.
  - GO-Biz (California) does not participate in marketing efforts itself, but sponsors a separate organization, TeamCalifornia, that serves as a marketing outreach and business development organization. TeamCalifornia is a statewide non-profit supported by business and public sector members and sponsors including, GO-Biz, multiple utility companies, and county economic development organizations.
  - To help drive economic development marketing efforts in Georgia, the state relies on a marketing collaboration known as Georgia Allies. This unique public-private partnership allows the state to effectively pool resources to increase economic development success in both new business recruitment and existing industry retention, and sponsors business information on Georgia InSite.
6. **Successful marketing efforts requires authenticity in messaging.** Strong marketing campaigns focus on “asset-based” strategies rather than “needs-based” strategies. Messaging needs to be authentic and focus on those factors where a state truly ranks well.
- The top goal JobsOhio’s marketing campaign is that the theme must resonate that Ohio is home in an authentic manner. It must be believable.
  - Those states considered to be “best in class” by executives and their advisors align their messaging with those areas in which they truly excel and rank well.
7. **Talent attraction is a now a critical component of marketing efforts.** As talent attraction becomes increasingly important, EDOs are recognizing the connection of the location as a good place to visit and a good place to live. Promoting lifestyle content and collaboration with tourism divisions are important tactics.
- Talent attraction is a metric employed by Indiana. Talent Attraction efforts within the state of Indiana are predominantly headed up by a coalition of seven regional economic development organizations. These organizations plan to invest \$3.78 billion in more than 420 cultural and livability projects across the state through the Regional Cities Initiative. The aim of the initiative is to create a quality of place that attracts and retains future talent. Additionally, Indiana’s “A

State that Works" campaign displays messages that compare quality-of-life factors in select target markets.

- A primary metric or goal of JobsOhio is to work with companies, universities, and other partners to design execute customized talent acquisition strategies
- GDEcD focuses on promoting the lifestyle advantages of Georgia in addition to the business advantages. The Division of Tourism is within the GDEcD.

8. **While hesitant to reveal specific details, there is a relatively wide range of marketing budgets.** Of the two organizations that revealed their total budgets, they ranged from \$4.45 million to \$8 million. In a recent report completed by DCI on state marketing budgets, we found that that on average, resources were allocated along the following divisions.



9. **Metrics are critical but no one way of measuring success.** Job creation and capital investment remain the top metric of success however as priorities shift towards talent attraction and other initiatives.

10. **The websites of those EDO's considered to be best in class provide staff contact information and at a minimum, a cursory description of the state's incentive programs.** These elements have consistently been identified by location advisors as integral elements of an economic development organization's website.

# State Competitor Research



<http://jobs-ohio.com>

## **Organizational Structure**

Over the past few years, Ohio's business climate and economic outlook have improved more than any other U.S. state and they consistently rank among the top states in terms of business climate and marketing efforts. The organization's business model and organizational approach has caught the attention of site selectors as a model to emulate.

In 2011, JobsOhio was privatized to provide greater flexibility in responding to companies. Goal is to run the organization more like a business and they rely heavily on input from a board of directors made up of private sector representatives.

JobsOhio is a private, nonprofit corporation with six different departments. JobsOhio is led by an Executive team of twelve members, headed up by John Minor as President and Chief Investment Officer.

Departments include:

- Sector Directors – (8 staff) Each one specializing in one of Ohio's target sectors and primarily focused on business retention and expansion (BRE)
- Business Development Team (4 staff) – Focuses on new projects and leads (non-Ohio companies)
- International Business Development Team (10 staff)
- Project Team (11 staff)
- Project Finance Team (3 staff)

In addition, JobsOhio has a nine-member board of directors with industry-specific experience (e.g., former executive from Silicon Valley).

JobsOhio has also fostered a strong regional network of EDOs. Prior to 2011, regional groups worked very much in silos but now work as a network with regular opportunities to share best practices and collaborate on projects.

Marketing Budget 2017 - ~\$8 million

## Objectives

*Mission:* JobsOhio is designed to lead Ohio in the attraction, retention, and expansion of business. JobsOhio assists in driving economic development across the State of Ohio by focusing on strategic industry sectors and business functions in areas of statewide and regional strength.

*Overall Mantra:* "See More, Win More & Close More Deals" for Ohio

Primary goals/metrics:

- Commitments from companies
- New jobs
- Retained jobs
- Capital investment
- Putting new leads and projects into the pipeline (10+ domestic missions)
- Work with regional organizations to focus on BRE
- Work with companies, universities, and other partners to design execute customized talent acquisition strategies

## Target Audience(s) and Sectors

*Target Audiences*

There is an equal emphasis placed on in-state business retention and expansion (BRE) as there is on attracting out-of-state companies.

International efforts:

- Canada – Partnering with RCI; Goal of 6+ mission trips (meet with 40 companies and 10 projects generated)
- Other international – Partnering with OCO Global to target 6 EU companies and 6 Asia companies

*Target Sectors and Key Messaging*

- Aerospace and Aviation
  - Aerospace companies in the state can integrate into an extensive supply chain that supports and is supported by many OEMs, including Boeing and Airbus. These two industry leaders spend more than \$15 billion annually in the state.
  - Public, academic and private industry partners to support innovation and commercialization goals.
  - UAS Center at Springfield-Beckley Airport, which is launching the first ground-based sense and avoid system, making it possible to fly unmanned aerial systems beyond visual line of sight in congested airspace.
  - More than 80 campuses at 27 colleges and universities in Ohio graduate 11,700 engineers and engineer technicians each year.
- Advanced Manufacturing
  - Construction ready sites via JobsOhio's SiteOhio and SiteOhio Authenticated.
  - The third largest manufacturing workforce in the nation (nearly 700,000 workers).

- More than 80 campuses at 27 colleges and universities in Ohio graduate 11,700 engineers and engineer technicians each year.
- Innovative apprenticeship training programs.
- Extensive manufacturing ecosystem, including 1,200 companies or establishments involved in metals and components.
- More than 1,800 plastics and rubber industry establishments.
- An integrated transportation, infrastructure, including roads, rails, water and air.
- Lowest taxes in the Midwest for manufacturing.
- No tax on: corporate profits; inventory; machinery; equipment and R&D investments; products sold to customers outside the United States.
- Abundance of reliable and sustainable natural gas via the Utica and Marcellus shale.
- \$10 billion spent annually on R&D in science and technology.
- Automotive
  - Central U.S. location in close proximity to a majority of North American automotive assembly plants, Tier 1 and Tier 2 suppliers, all leveraging an integrated, intermodal logistics infrastructure.
  - Intelligent transportation resources offering contained and open road testing, independent test facilities and the first U.S. Department of Transportation Smart City.
  - Access to an educated manufacturing workforce available at 10 percent lower wages than the national average for the top 10 auto occupations.
  - Competitive business climate distinguished by the lowest tax rate in the Midwest on new capital, intensive manufacturing operations.
- Biohealth
  - 1,600 Bioscience companies and \$100 million per year invested in Biohealth by Ohio Third Frontier.
  - World-Class Health Care: 16 of the top 233 U.S. Hospitals; Top 10 in Pediatric Care.
  - R&D Infrastructure – Top 7 Research Consortia; home to 16% of all U.S. clinical trials in 2015.
  - Home to some of the biggest names in Biohealth: Proctor & Gamble, Ethicon, Cardinal Health.
  - 90% of U.S. Pharmaceuticals are distributed through Columbus, Ohio.
  - Increase speed to market with Ohio's strong logistics infrastructure.
- Energy and Chemicals
  - Access to large amounts of natural gas, natural gas liquids and crude oils from Utica and Marcellus shale formations.
  - Ohio is ranked first in polymer output and is the No. 1 supplier of polyolefin.
  - Ohio's deregulated power market offers unique and differentiated plans, including reliable electricity.
  - Low taxes, a favorable regulatory environment and a streamlined permitting process allows for less restrictions on operations and speed to market.
  - Low-cost and reliable energy.
- Financial Services
  - Ohio is second for number of top U.S. bank and insurance company headquarters (after New York City).
  - Easy access to innovation collaboration – a two-hour direct flight or array of transportation options connects to about 75 percent of the North American financial services industry, including Fortune 500 and Fortune 1000 headquarters.
  - Commercial rent is one-quarter the cost of New York City.

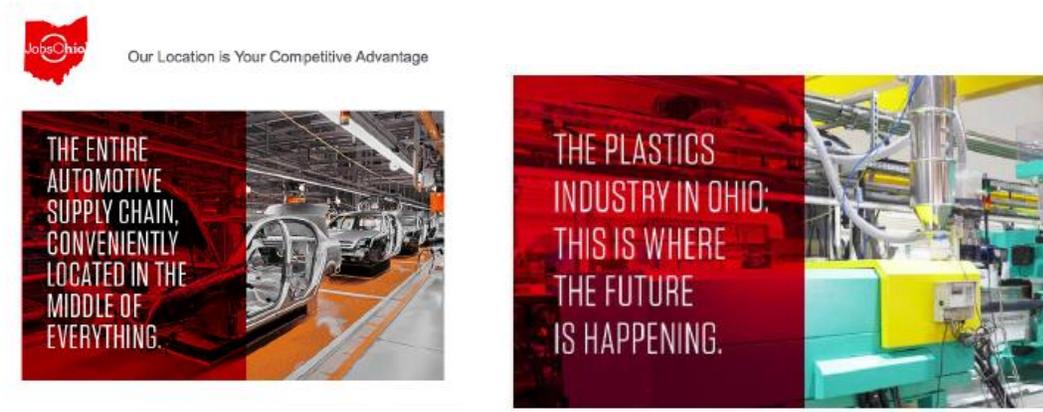
- Ohio Universities produce 35,000 graduates annually including innovation leaders in banking, insurance and financial services.
- Fintech innovation initiatives, Fintech71, a global fintech accelerator focused on entrepreneurial growth in fintech innovation, is based in Ohio.
- Food & Agribusiness
  - Ohio's food and agribusiness industry boasts hundreds of companies that cultivate, process, package, distribute and market food and drinks
  - Affordable, connected infrastructure with multiple transportation options offer efficient, cost effective ways to obtain raw materials, produce goods and deliver food to market.
  - With an agrarian history and strong university system, Ohio has all levels of talent, from entry-level workers to management-level executives.
  - Companies can partner with and learn from industry leaders, and leverage the state's R&D resources.
  - From growers and producers, processors, packagers, distributors, retailers and ultimately consumers, the entire value chain is in Ohio.
- Information Technology
  - Twenty-four data analytics and 26 cyber security programs offered by Ohio colleges and universities are available to companies invested in Ohio.
  - Cloud computing and consumer analytic hubs enable companies of all sizes to thrive in the digital age.
  - Thousands of high-quality and diverse tech graduates join an existing deep talent pool every year.
  - A quality of life that offers a low cost of living and vibrant cities with diverse cultures – ideal for startups and millennial talent.
- Logistics & Distribution
  - Ohio has the nation's fourth largest interstate system, 10 major rail yards, 13 intermodal terminals, four dedicated air cargo terminals, seven commercial airports and three inland water ports.
  - Ohio is within one day's drive of more than 60 percent of North America's manufacturing capacity.
  - Nine foreign trade zones provide cost-effective access to suppliers and markets around the world. Direct shipping through the Port of Cleveland offers an economical and efficient means of moving cargo to global markets.
  - 25 Ohio institutions offer national ranked programs in logistics and supply chain management.

## **Campaigns**

A new marketing campaign was launched in 2016/2017 that was developed with the following requirements:

1. The theme must resonate that Ohio is home in an authentic manner. It must be believable.
2. Must speak to Ohio on a global & national appeal.
3. Needs to resonate with C-suite audience inside and outside Ohio, stakeholders, media and everyday Ohioans.
4. Should bring humanity to connect audiences to jobs objective.
5. Put Ohio on the map.
6. Pillar of the campaign will include the boomerang concept.
7. Must reduce the timeline for execution and external resource time commitment.

## Examples of Industry Sales Campaigns:

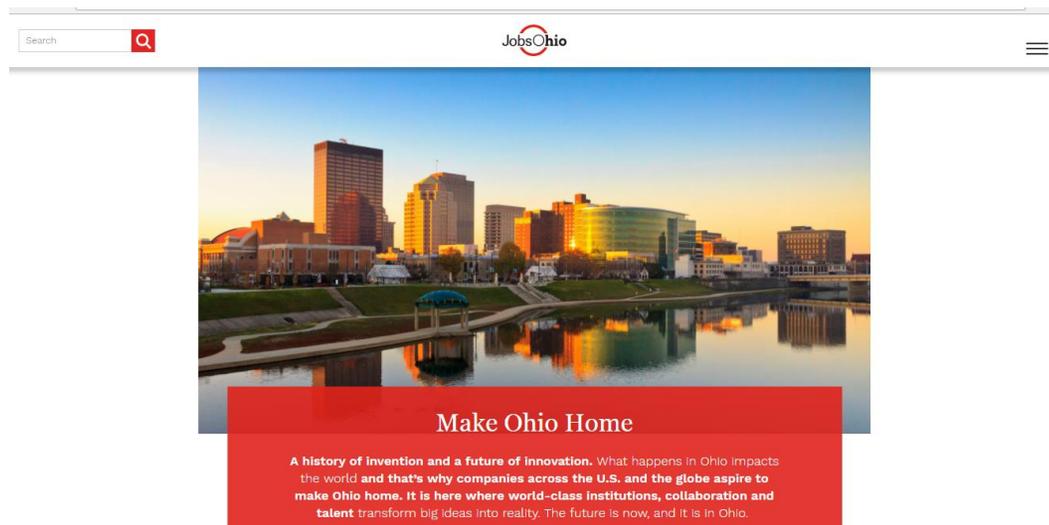


## Tactics and Approach

Participation in industry events/hosting special events

- Area Development Consultants Forum 24
- Economix
- Fintech Connect Live
- Transportation Research Board
- Consumer Electronics Show (CES)
- North American Auto Show
- Automotive News World Congress
- SAE Govt/Industry Meeting

## Key Messaging



*"Ohio is Home" to the people, to the ideas, to the enterprises that are creating a better version of tomorrow.*

# The Ohio Advantage

Redefine innovation with Ohio's competitive assets. Ohio is the premier location for companies that want to build a legacy. Leverage these advantages to achieve next-level success.



## Business Climate

Ohio's strong and growing economy provides stability and predictability for companies. Whether it's our \$2 billion budget reserve or lower taxes and operating costs, Ohio's pro-business tax climate provides companies high-quality results at a fraction of the cost compared to other states.

[READ MORE](#)



## Workforce

We are driven by our people. A labor force of 5.7 million to be exact. With more than 200 educational institutions that combine classroom, technology and hands-on work, you get the talent today that is ready for the jobs of tomorrow.

[READ MORE](#)



## Infrastructure

Ohio's location and integrated transportation infrastructure enable Ohio companies to reach customers and suppliers quickly and cost effectively, while also making it easy to leverage next-generation logistics capabilities.

[READ MORE](#)



## Research and Innovation

Ohio's comprehensive network of innovative institutions offers companies opportunity to collaborate and partner on new discoveries that can further their competitive advantage and impact their respective industries.

[READ MORE](#)

- **Business Climate**
  - Ohio's economy is strong and highly diversified, ranking as the 7th largest economy in the U.S. and the 21st largest globally.
  - The state has been experiencing strong growth, driven in large part by the state's \$2 billion budget reserve, strong credit rating and pro-business tax structure.
- **Workforce**
  - With more than 5.7 million people in the workforce, Ohio is home to an abundant, vibrant and industrious talent pool.
  - More than 200 academic institutions in Ohio graduate over 170,000 students annually from exceptional education programs, many incorporating both classroom and hands-on lessons.
- **Infrastructure**
  - Global Access from Ohio.
  - A location within one day's drive of more than 60 percent of North America's manufacturing capacity.
  - The nation's fourth largest interstate system.
  - Four dedicated air cargo terminals, seven commercial airports and three inland water ports.
  - 10 major rail yards and 13 intermodal terminals.
- **Research & Innovation**
  - Every year, Ohio's private and public research institutions partner with companies to foster discovery. Companies in Ohio benefit from the support of a comprehensive and connected innovation network. Through universities, incubators and research organizations, Ohio is supporting everything companies need for the next generation of business.
- **Incentives**
  - JobsOhio Loan and Grant Programs
  - State Loan and Grant Programs
  - State Tax Credits

## Digital

- Social media footprint and followers
  - LinkedIn: 6,881 followers ([www.linkedin.com/company/2425285](http://www.linkedin.com/company/2425285))
  - Twitter: 11,900 followers ([www.twitter.com/WhyOhio](http://www.twitter.com/WhyOhio))
  - Facebook: 2,052 followers ([www.facebook.com/JobsOhio-429794970538894/timeline](http://www.facebook.com/JobsOhio-429794970538894/timeline))
- New website launched at end of 2017
  - Home page mirrors new campaign: Make Ohio Home; aligned photography and messaging throughout website
  - Website will leverage Google translate in target international markets using search engine optimization for key words and phrases
  - Website is very comprehensive and easy to navigate
  - Contact form on home page
  - Managing Directors on each sector page with photos/contact information

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### Managing Directors



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[www.iedc.in.gov](http://www.iedc.in.gov)

## **Organizational Structure**

The Indiana Economic Development Corporation (IEDC) is the State of Indiana’s lead economic development agency. In order to respond quickly to the needs of existing and potential companies, the Corporation operates like a business and is organized as a public private partnership governed by a board of directors. IEDC is led by Indiana Secretary of Commerce Jim Schellinger and IEDC President Elaine Bedel. IEDC. The IEDC Board of Directors is chaired by Governor Eric Holcomb and “reflects the geographic and economic diversity of Indiana.”

The Business Development Division works with companies considering Indiana for expansion and attraction opportunities. IEDC staff specializes in geography rather than specific industries. With five regional offices, each with their own director, IEDC directs any incoming inquiries to the corresponding regional office. Their main office is located in the capitol, Indianapolis, and their five regional offices are located in the North Central, Northeast, Northwest, Southeast and Southwest regions of the state. The central region is headed up by four project managers. Project managers within this division serve as a company’s primary point of contact for the purposes of identifying project sites and pursuing state economic development incentives

The Corporation focuses its efforts on growing and retaining businesses in Indiana and attracting new business to the State. It has incorporated most state entities with economic development responsibilities into its organizational structure and is also responsible for the development and implementation of the State’s strategic plan for economic development.

Marketing Budget 2017 - \$4.45 million

Marketing Budget 2018 – \$4.45 million

## **Objectives**

*Mission:* The Indiana Economic Development Corporation is committed to attracting and supporting new business investment, creating new jobs for Indiana residents, and furthering Indiana’s legacy as one of the top states in the nation for business.

Primary goals/metrics:

- Number of projected new jobs
- Average hourly wage of projected new jobs
- Average years to recover state investment of economic development incentives
- Grow talent pool

## Target Audience(s) and Sectors

### *Target Audiences*

There is an equal emphasis placed on in-state business retention and expansion as there is on attracting out-of-state companies. However, beginning in late 2016 a marketing plan launched to more deeply target four strategic markets—Chicago, San Francisco, New York and Atlanta.

International efforts: IEDC has two international offices located in Japan and Berlin.

Talent Attraction efforts within the state of Indiana are predominantly headed up by a coalition of seven regional economic development organizations: North Central, Central, East Central, Northeast, Northwest, Southwest, and West Central. Together, these organizations plan to invest \$3.78 billion in more than 420 cultural and livability projects across the state through the Regional Cities Initiative. The aim of the initiative is to create a quality of place that attracts and retains future talent.

### *Target Sectors and Key Messaging*

- Aerospace and Aviation
  - Since 2014, leading aerospace businesses have announced plans to invest more than \$900 million in Indiana and create more than 1,200 new jobs in the coming years.
  - Home to more than 34,000 engineers (46% above US average).
  - Average Wage: \$89,000 Annually (double the state's average wage).
  - Ranked #6 for aerospace attractiveness by PwC.
- Advanced Manufacturing
  - Indiana's automotive industry is located throughout the state, and is comprised of 5 major OEM assembly plants and over 500 automotive suppliers.
  - In 2015, the automotive industry directly employed more than 100,000 workers in Indiana.
  - 2nd largest by GDP in the U.S.
  - 3rd overall U.S. production.
  - 5 OEM Plants have produced 5.1M cars & trucks since 2010.
  - Home to 500 Tier 1, 2 & 3 auto supplies, employing 100,000 Indiana residents.
  - 25% of Indiana's economic output is based in the manufacturing sector.
  - 1 in 5 Hoosiers go to work in manufacturing.
- Agribusiness
  - \$11.2B of products sold, ranking No. 10 in the U.S.
  - \$5.7B in agricultural exports.
  - Over 10,000 agribusiness companies.
  - 1st in commercial duck production & popcorn production.
  - 2nd in tomatoes for processing & ice cream production.
  - 3rd in soybean processing.
  - 4th in soybean production, egg production & corn processing.
  - 5th in corn, hogs, spearmint & cantaloupe.
  - 10th in the nation in agricultural production value with 60,000 farms.
  - Purdue Agriculture & Biological Engineering, ranked #1 nationally for Biological/Agricultural Engineering by U.S. News and World Report (2016).

- Cybersecurity
  - State-wide network of co-working spaces, accelerators and incubators to support growing tech companies.
  - State level cybersecurity advisory council.
  - Lowest tech labor costs, office rental rates and average monthly apartment rental rates compared to major tech hubs Austin, Washington D.C., New York City, Seattle and San Francisco.
  - 4th best State regulatory environment.
  - 8th best State Tax Climate Index.
  - 2nd lowest cost of doing business.
- Defense and National Security
  - Naval Surface Warfare Center Crane (NSWC Crane) and Atterbury-Muscatatuck Training Center.
  - The NSWC Crane Division is the largest tenant of Naval Support Activity, Crane (NSA Crane), the third largest U.S. Naval installation worldwide.
  - Network of small arms testing and support capabilities.
- Energy
  - Energy projects spanning from a 150-megawatt wind farm to a battery farm that is one of the largest energy storage facilities in the Midwest.
  - Indianapolis International Airport is home to North America's largest airport-based solar farm.
- Information Technology
  - Cost of living advantages – average apartment cost in Indianapolis is 87% less than New York and 72% less than San Francisco; average office space cost is 76% less than New York and 70% less than San Francisco.
  - AAA bond ratings and balanced budgets allow Indiana to deliver business cost packages that add up to considerable savings.
  - Favorable tax environment.
  - 70% higher computer and IT job growth than the rest of the U.S.
  - Since 2007, 12 technology companies in Central Indiana have either been acquired or have gone public, generating \$4.5 billion in market value and creating more than 3,700 Indiana jobs.
  - Purdue University recently ranked 15th worldwide for university-issued patents and is home to more supercomputing capacity than any other U.S. campus, with three of the top 500 supercomputers in the world.
  - 2x the national average in fiber-optic networks.
- Life Sciences
  - Home to nearly 2,000 life sciences companies employing 56,000 Indiana residents.
  - Indiana ranks as one of the top five states for the number of companies, concentration of companies, and total number of life sciences industry jobs; Indiana also has the second highest national concentration of biopharmaceutical jobs.
  - Indiana's life science exports total \$9.8 billion, the second highest in the U.S.
  - Indiana is the orthopedic capital of the world, and home to the world's largest private medical device manufacturer.
  - Multiple Life Sciences Collaborations including Bio Crossroads, the Indiana Health Industry Forum, the Indiana Biosciences Research Institute, Kelley School's Center for Business of Life Sciences.
  - Economic Incentives for Life Sciences: The Patent Income Exemption program, The Research and Development Sales Tax Exemption, The Research and Development tax credit, The Venture Capital Investment tax.

- Logistics and Transportation
  - National leader in pass-through interstates.
  - Home to 2nd largest FedEx air hub worldwide.
  - 3rd in total freight railroads.
  - Three maritime ports that together rank 7th in waterborne shipping, provide the only statewide port system with direct waterway access to two U.S. coasts.
- Motorsports
  - Indianapolis Motor Speedway is home to some of the most prestigious motorsports attractions, including the Indianapolis 500, the Brickyard 400, and the Red Bull Indianapolis MotoGP.
  - Purdue University is one of only six U.S. research centers chosen in a five-year, \$259M initiative from the Institute for Advanced Composites Manufacturing Innovation and the U.S. Department of Energy.
  - Six Indiana colleges and universities offer motorsports education opportunities and certifications, including the nation's only motorsport engineering degree program.
  - 2nd largest Automotive GDP in the U.S.
  - Over 2,100 motorsports companies and many of the nation's top professional racing teams.

## **Campaigns**

The state's overall "A State that Works" economic development campaign deployed in 2013 and continues to be in use today. In addition, a marketing plan launched in late 2016 to more deeply target four strategic markets—Chicago, San Francisco, New York and Atlanta—used messages consistent with the state's overall "A State that Works" this economic development campaign.

The ads appear on or in billboards, magazines, newspapers and internet and mobile platforms and are geo-targeted to a particular city for three months. They display messages that compare quality-of-life factors in the various markets. The goal of this campaign is an effort to make a bigger splash in the months leading up to sales meetings in a specific target market.

For instance, from January to March (2017), San Franciscans were informed in advertisements about a "crazy idea": affordable rent, minutes away from the office."

Atlanta residents from March to May were asked, "Does your commute feel like a part-time job?" And the same message greeted New Yorkers from May to July.

The four cities targeted were chosen for their stark contrast with Indiana in particular metrics the state wants to highlight.



## Tactics and Approach

### Key Messaging

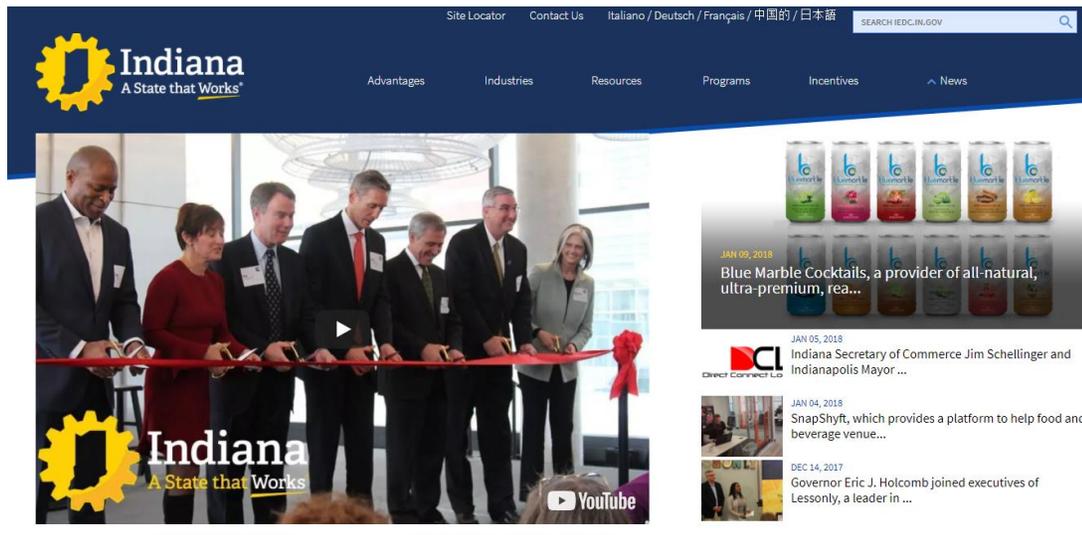
*A State that Works* – marketing campaign designed to draw attention to the numerous reasons Indiana is a state that works for business.



- Top Tax Climate – Indiana’s long history of smart fiscal choices, balanced state budgets and cash reserves in a rainy-day fund puts the Hoosier State in a position to lower taxes.
- Fiscally Attractive – As one of only a handful of U.S. states with a AAA credit rating and an actual budget surplus, Indiana is lowering business taxes this year, next year and every year after that through 2021. Indiana is one of the top states for regulatory freedom, and is defining a new standard of opportunity for businesses to reach their full potential.
- A State that Works – Indiana draws its strengths from the vibrant cities and towns, beautiful state parks and trails, a bold history of sport and culture, and some of the most amazing people you’ll ever meeting who are delivering craft, passion and brilliance to Indiana.

## Digital

- Social media footprint and followers
  - Facebook: 1,966 followers ([www.facebook.com/indianaEDC](http://www.facebook.com/indianaEDC))
  - Twitter: 5,988 followers ([www.twitter.com/indiana\\_edc](http://www.twitter.com/indiana_edc))



- Website is easy to navigate, features menu bar at the top with links to the following pages
  - Advantages – General overview of the Indiana’s competitive advantages for business operations.
  - Industries – Overview of key industries, and Indiana’s competitive advantages for each, as well as links to tax credits and other incentive programs.
  - Resources – Links to resources for business location, expansion, etc. including economic data, maps and downloads, organizations, project information management system, transparency portal, programs, site locator, info for startups, and incentives.
  - Programs – Overview of the available programs and initiatives for businesses, including programs for expansion, infrastructure and workforce.
  - Incentives – General overview of available incentives.
  - Site Locator – Zoomprospector of available Indiana sites.
  - News
  - Bottom of the page features same links, links to social media and a contact the IEDC widget. which offers a form fill-out or contact information for the directors of each of IEDC’s regional offices, as well as their international offices.
  - Website offers several translation options (i.e., Italian, Dutch, Chinese, Japanese, etc.)
- Office director contact information is readily available, but must search through IEDC employee directory for any other contacts.



<https://businessintexas.com>

## Organizational Structure

The Texas Economic Development Corporation (TxEDC) is an independently funded and operated 501(c)(3) nonprofit organization responsible for marketing and promoting Texas as a premier business location. Funds raised through the TxEDC are used to fund special events, outreach programs, and other exciting and highly visible marketing and communications programs. Along with the Governor's Office of Economic Development and Tourism (EDT), these two highly focused organizations make up the cornerstone of Governor Greg Abbott's economic development agenda to build a stronger Texas.

TxEDC is made up of four full-time staff, with Robert Allen as President & CEO. The eight-member Board of Directors is comprised of business leaders, economic developers and higher education representatives, all appointed by Texas Governor Greg Abbott. The organization is made possible through the support of a broad range of organizations, Fortune 500 companies and privately-held enterprises throughout the state. The organization is funded through tiered level contributions by businesses and economic development organizations committed to the promotion of economic growth, investment and job creation in the state of Texas. Annual commitment levels ranging from \$3,000 to \$250,000 offer an array of benefits.

In pursuit of its mission, TxEDC works closely with a statewide network of economic development partners.

The TxEDC four-point strategic plan serves as the foundation of Texas' economic development and marketing success.

- 1. State-Wide Business Network:** TxEDC is advancing a network of business leaders throughout the state to drive economic development. The states five regions (Panhandle and West Region, East Texas and Metroplex East Region, Central Texas Region, Gulf Texas Region, and South and Midwest Texas Region) are each represented by a member of TxEDC's Board of Directors.
- 2. Global Marketing:** TxEDC markets Texas globally through a robust program of industry events, media relations, advertising, etc.
- 3. Trade Visits:** TxEDC spearheads world-class national and international trade visits to market Texas in key markets throughout the U.S. and the globe. In 2017, TxEDC visited U.S-based trade shows in Tucson, Houston, Washington D.C., and San Diego, as well as abroad in Shanghai and Paris.
- 4. Special Projects:** To ensure that Texas stays competitive, TxEDC provides strategic assistance to Governor Abbott to elevate the state in three key areas: Broadband, Education Connection, Health Sciences.

TxEDC works closely with the Office of the Governor Economic Development & Tourism Division (EDT), which facilitates the location, expansion and retention of domestic and international business investment to the state. The office works to assist businesses with job creation and investment opportunities, including expanding exports. In addition to assisting outside companies locate or expand in Texas, the EDT team also assists Texas companies and entrepreneurs with navigating the state's streamlined regulator process, improving export opportunities and growing a successful business.

Marketing Budget 2017 – N/A

## **Objectives**

*Mission:* The combined efforts of the TxEDC and the Office of Economic Development and Tourism market the state as a premier business location and travel destination with the goal of developing job creation and export opportunities for Texas.

Primary goals/metrics:

- Generation of leads
- An increase in job creation and retention
- An increase in capital investment and trade

## **Target Audience(s) and Sectors**

### *Target Audiences*

External audiences include targeted corporate executives (with emphasis on target sectors); site selection consultants; and international audiences.

Internal audiences include corporate executives and in-state economic development professionals.

International efforts: TxEDC participates in six export-oriented trade shows annually including Hannover Messe, Offshore Technology Conference, Farnborough International Airshow, Automechanika Frankfurt, Medica and POWER-GEN.

Established in 1971 to attract Mexican trade and investment, the State of Texas Mexico Office markets the State as a premier business investment destination from its location in Mexico City. The Texas-Mexico Office assists Mexican companies looking to invest in Texas and Texas businesses looking to export to Mexico.

Additionally, TxEDC also plans to conduct a mission to Western Europe in 2018 and will do a targeted digital campaign around it, which will involve more targeted messaging.

### *Target Sectors and Key Messaging*

- Advanced Tech and Manufacturing
  - Texas is a leader in nanotechnology research and distribution; is nationally ranked for nanotech-related activities including research, venture capital, and commercialization; and has laid claim as

the origin of nanotechnology based on the ground-breaking work conducted by Houston-based Rice University and by the late Nobel Laureate Rice Professor Richard E. Smalley.

- The Texas Enterprise Fund (TEF) is a significant cash grant for companies seriously considering Texas and another state. TEF has awarded grant funding for advanced technology companies from small to large, including a \$10.8 million grant to help fund the Samsung Semiconductor expansion.
- Texas accounts for 16 percent of full-size pickup truck retail sales, and the state is a leading manufacturing site for pickup trucks and SUVs.
- Texas manufacturing employs nearly 874,450 people at an average annual salary of \$71,500. GM and Toyota are the largest automotive manufacturing employers in Texas.
- Texas is the top U.S. state for manufacturing exports and shipment value. In just one category – transportation equipment – Texas exported more than \$23.2 billion in 2014.
- Aerospace, Aviation & Defense
  - The aerospace and aviation industry directly employs over 130,000 Texas workers at 1,300 establishments.
  - The average annual salary for select aerospace workers in Texas is \$95,414.
  - Texas is home to 15 active military bases with more than 170,000 military personnel.
  - NASA's Lyndon B. Johnson Space Center is the hub for the world's operations in outer space.
  - From Dallas Fort Worth (DFW) to San Antonio International (SAT), Texas has six of the 50 busiest airports in the nation (measured by passengers boarded). Dallas and Houston have two airports each. Texas also has two major international industrial airports, Port San Antonio at the former Kelly AFB and Fort Worth Alliance Airport. In sum, Texas has 26 commercial airports serving 22 cities and a robust civil aviation culture.
  - Education: Texas State Technical College in Waco uses its own airport – the largest airport owned and operated by a public educational institution – to teach a full range of FAA-approved programs, ranging from Aviation Maintenance to Pilot Training. The University of Texas in Austin, UT Arlington, Texas A&M and Rice University all have full departments dedicated to Mechanical and Aerospace Engineering, graduating many informed, astute engineers each year. St. Philip's College in San Antonio is a leader in partnering with business, and has developed its programs with Lockheed Martin, Boeing, Chromalloy, ST Aerospace, Cessna Citation, M-7, Standard Aero, Gore Design, and the U.S. Air Force. St Philips' FAA Airframe & Power Plant license, the Avionics Certificate and a nationally-recognized dual credit aerospace academy are taught by FAA-certified educators.
  - Existing Infrastructure: Boeing, Lockheed Martin, L-3 and Bell Helicopter operate aerospace product manufacturing facilities; Southwest and American airlines maintain headquarters in the Dallas Fort Worth Metroplex, and 14 aerospace companies perform defense contracts in Texas.
- Biotechnology & Life Sciences:
  - Texas is home to more than 3,900 life science and research firms, and approximately 97,600 workers in related fields.
  - The Texas Medical Center (TMC) is the world's largest medical complex, and is also home to the world's largest children's hospital—the Texas Children's Hospital— and the world's largest cancer hospital—MD Anderson Cancer Center.
  - From 2008 to 2013, venture capitalists invested \$1.3 billion in 161 biotech and medical device deals.
  - In 2014 alone, Texas public institutions of higher education spent nearly \$2.5 billion on medical and life sciences research, accounting for more than 56% of all higher education R&D expenditures in the state.
  - In Fall 2015, Texas ranked third nationally for number for clinical trials, with approximately 20,400 studies underway according to the National Institute of Health
- Information & Computer Technology:

- Texas ranks second in the nation for computer and video game employment, with more than 13,600 people employed directly or indirectly by the industry.
- Employment in computer systems design has risen 60 percent in Texas over the last 10 years.
- The computer science program at The University of Texas at Austin is the largest top-10 ranked computer science program in the nation.
- Dell Computers originated in Austin when Michael Dell was still a student at the University of Texas.
- Texas is home to over 17,600 technology firms, employing 203,700 workers with an average wage of \$96,600.
- Computer Systems Design & Services employs 69 percent of the state's industry employment and is continually growing.
- San Antonio has emerged as a cyber security national center of excellence, beginning over 20 years ago with security operations at Kelly Air Force Base.
- Texas data centers serve U.S. and global hosting providers and customers numbering in the millions. The state is one of the nation's top locations for data centers because of its centralized location, reasonable power costs, independent energy grid, favorable weather and skilled workforce.
- The Texas Enterprise Fund (TEF) attracts major players in web-based services such as Internet publishing and broadcasting companies, web search portal operators and specialized telecommunications service companies such as Internet Service Providers.
- **Petroleum Refining & Chemical Products**
  - Texas is home to ExxonMobil, headquartered in Irving, Texas, providing oil, gas and chemicals to the world. It is second in the Fortune 500 companies.
  - Texas is home to over 50 energy-related companies on the Fortune 1000 list. More than 3,700 energy-related establishments are located within the Houston Metropolitan Statistical Area.
  - As of January 2015, the 27 petroleum refineries in Texas had a capacity of over 5.1 million barrels of crude oil per day and accounted for 29% of total U.S. refining capacity.
  - The average yearly wage in Texas' refining and chemical manufacturing industry is \$95,000.
  - With 100,000 workers employed, Texas is home to the largest petrochemical cluster in the world.
  - Houston alone accounts for over 40 percent of the nation's base petrochemical capacity.
- **Energy**
  - As the only state with its own grid, Texas' electrical transmissions and new energy development are free from federal regulation.
  - Texas is a major nuclear power generating state, with almost 5,000 MW of installed nuclear power.
  - Texas leads the nation in installed wind capacity (16,000 MW), and is home to two of the largest wind farms in the western hemisphere.
  - The energy sector contributes more than \$172 billion to the Texas economy.
  - Texas is #1 in total energy production, biodiesel production capacity, and solar energy potential.

## **Campaigns**

TxEDC first launched their program to market the business climate of the state in 2003 under as the TexasOne™ Program. In 2015, the TexasOne™ Program was restructured to become a stand-alone, self-funded 501(c)(3) nonprofit organization. Shortly after, in 2016, the organization was reintegrated into the larger umbrella organization, the Texas Economic Development Corporation. In June 2017, TxEDC launched "GO BIG IN TEXAS®" to market and promote the state as a premier business destination.



TxEDC has not undertaken specific official campaigns outside of their rebranding efforts but they are ramping up their digital advertising and paid social efforts to get their new brand and videos seen by the right audiences. Messaging does not differ by geography but these efforts do target specific locations, industries and job titles.

- Locations: California, New York, Illinois, Florida and MSAs: Seattle, San Francisco, Washington, D.C., Boston, Atlanta and Detroit
- Industries: TxEDC key industries (Advanced Tech & Manufacturing, Aviation, Aerospace & Defense, Biotechnology & Life Sciences, Information & Computer Technology, Petroleum Refining & Chemical Products, Energy) and Commercial Real Estate
- Job Titles: Key decision makers, such as CEO, CFO, CIO, COO, CTO, President, VP of Corporate Real Estate, VP of Operations, VP of Business Development

### Tactics and Approach

TxEDC spearheads national and international trade visits to market Texas in key markets throughout the U.S. and the globe. In 2017, TxEDC visited U.S.-based trade shows in Tucson, Houston, Washington D.C., and San Diego, as well as abroad in Shanghai and Paris.

### Key Messaging

*Texas gives you room to GO BIG.* Key messaging focuses on the sheer size of Texas.

- **Economic Powerhouse:** If Texas were a nation, it would be the 10th largest economy in the world based on GDP.
- **Fair Legal System:** Texas' fair legal system limits unnecessary regulation to allow business to prosper.
- **World-Class Infrastructure:** With 26 commercial airports, 11 deep-water ports and more miles of public roads and freight rail than any other state, Texas has the infrastructure to enable companies to operate profitably on a global scale.
- **Competitive Tax Climate and Incentives:** Texas offers a competitive tax climate and powerful incentives to allow businesses to invest in the things that matter—growing their workforce, improving facilities and boosting their bottom line.
- **Quality of Life:** The Lone Star State continues to attract businesses and workers from across the nation and around the world to take advantage of its comparatively low cost of living and dynamic cultural and recreational opportunities. There's simply no place in the world that's quite like Texas.
- **Big, Skilled, Educated and Diverse Workforce:** Texas has the second largest civilian workforce in America—13 million Texans. Top-notch schools feed a strong pipeline of talent into the state and out-of-

state workers continue to flock to Texas to take advantage of diverse job opportunities and quality of life amenities.

## Digital

- Social media footprint and followers
  - Facebook, 2,184 followers, <https://www.facebook.com/GoBigInTexas>
  - LinkedIn, 68 followers, <https://twitter.com/GoBigInTexas>
  - Twitter, 3,085 followers, <https://twitter.com/GoBigInTexas>
  - Instagram, 54 followers, <https://www.instagram.com/GoBigInTexas/>



- Website is comprehensive and easy to navigate
  - Why Texas - general overview of the advantages of the state's business climate
  - Services - general overview of the services provided by the Office of the Governor
  - Industries - Information for their key industries
  - International - Information for international businesses looking to locate in the state
  - Small Business - information on services and assistance provided by TxEDC for small businesses in- and out-of-state.
  - Resources - Miscellaneous links to various resources including an external database of available sites within the state.
  - Website also includes an About section with information on TxEDC and the Office of Economic Development and Tourism; a Contact section with fill-out form, and mailing addresses of the offices (including Mexico office); News & Events links.
  - Within the About section, the emails of the four full-time staffers are listed and a general office phone
  - Website includes multiple links to social media sites



WHY TEXAS SERVICES INDUSTRIES INTERNATIONAL SMALL BUSINESS RESOURCES

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ABOUT CONTACT EVENTS NEWS

# Global Leaders Choose Texas

Texas recently welcomed a multi-billion-dollar project from ExxonMobil and SABIC and headquarters projects from Hulu and Boeing.

RECENT NEWS





<http://www.georgia.org/>

## **Organizational Structure**

The Georgia Department of Economic Development (GDEcD) is the state's sales and marketing arm, the lead agency for attracting new business investment, encouraging the expansion of existing industry and small businesses, aligning workforce education and training with in-demand jobs, locating new markets for Georgia products, attracting tourists to Georgia, and promoting the state as a destination for arts and location for film, music and digital entertainment projects, as well as planning and mobilizing state resources for economic development.

The department's executive leadership includes 13 full-time staff under the leadership of Governor Nathan Deal. The 23-member GDEcD Board of Directors comprises one member from each congressional district and nine at-large members.

GDEcD is a state agency, and collaborates with dozens of development agencies across the state. These partnerships support the future health and strength of Georgia's. The result is innovative programs that accelerate industry growth, help educate diverse workforces and connect business leaders, while creating thousands of new jobs and hundreds of new businesses.

A key partner of GDEcD is Georgia Allies. Georgia Allies helps accelerate economic development by creating a powerful voice for Georgia's pro-business climate, hosts annual Red Carpet Tours for business executives from around the world, and more. As a public-private partnership that pools resources to increase economic development success the organization is able to be more customized and flexible.

GDEcD is made up of nine divisions and departments,

- Centers of Innovation
- Tourism
- International Trade
- Global Commerce
- International Relations
- Film, Music and Digital Entertainment
- Georgia Council for the Arts
- Workforce
- Marketing and Communications

Marketing Budget 2017 – N/A

## Objectives

### *Mission and Key Objectives:*

- Continue to differentiate the product
- Maintain/foster a pro-business mentality
- Doesn't want GDEcD to be perceived as typical government agency hindering progress but rather a partner to new and expanding companies

### Primary Goals/Metrics

- Capital investment
- Jobs created
- Number of expansions of existing companies
- Amount of foreign direct investment
- New users to Georgia.org
- Number of visits to Georgia.org

## Target Audience(s) and Sectors

### *Target Audiences*

A key audience for GDEcD are location advisors due to the multiplier effect of this audience. GDEcD has devoted considerable resources to this audience and have very specific tactics in place. Existing companies are extremely important from a retention perspective but also as partners in business attraction efforts and in outreach efforts to the site selection community.

### *Target Sectors and Key Messaging*

- Aerospace
  - Travel to client sites, manufacturing facilities and other locations all over the world with easy access to Georgia's 104 public and 339 private airports.
  - International representatives in 11 strategic global markets.
  - Maintain competitive edge by establishing strategic partnerships with Robins Air Force Base, key state contacts and other aerospace industry leaders.
  - Lower costs with robust tax incentives.
  - Expand business with access to potential investor networks, alternative financing, private contract actions.
- Agribusiness
  - Increase efficiency and profitability with a robust transportation network.
  - Mitigate business risk by tapping into Georgia's mature agribusiness infrastructure.
  - Maintain competitive advantage with access to funding.
  - Find solutions to seasonal and year-round workforce challenges through Quick Start, the nation's top-ranked workforce training program.
- Arts
  - Drive tourism, create jobs and attract new businesses to our state.
  - Revitalize communities.

- Engage citizens in programs and services that offer benefits ranging from improved physical and mental health and increased civic engagement to new skills development and better problem-solving.
- Play an essential role in education, cultivating the next generation of entrepreneurs, leaders, inventors, and creative problem solvers that will place Georgia as a leader in the global economy.
- Build and invest in community connections creating a collective sense of place and identity.
- Automotive
  - Prime Southeastern location
  - Airport connectivity
  - Top-ranked workforce
  - Low cost of electricity
  - Low cost of doing business
- Contact Centers
  - Mitigate business risk with a statewide integrated transmission system, minimizing disruptions.
  - Increase productivity with a skilled workforce and customized workforce education programs that address the needs of contact centers.
  - Maintain a competitive advantage by developing custom broadband systems, computing and content processing.
  - Lower operating costs with no state sales tax on certain types of calls and savings from non-regulated telecommunications services.
- Data Centers
  - Mitigate the risk of disruption with a reliable statewide integrated transmission system.
  - Increase productivity with a skilled workforce and customized workforce education programs that address the needs of the data center industry.
  - Save on operating costs with non-regulated telecommunications services.
  - Maintain a competitive edge by developing custom broadband systems, computing and content processing.
- Digital Entertainment
  - 30% tax credit
  - Solid technology infrastructure and cost competitive
  - Creative and highly educated workforce
  - Top talent and leading academic institutions
  - Entrepreneurial business environment
  - Established digital media industry
- Energy & Environment
  - Mitigate business risk with expertise in real estate, corporate tax, labor, transportation and access to air, rail and ports.
  - Save time and start-up costs using facilities with clean rooms that can be modified for solar production.
  - Lower operating costs with inexpensive manufacturing and technology facilities.
  - Accelerate smart grid systems development with the resources of the Technology Association of Georgia's (TAG) Smart Energy Society.
  - Access research and development resources such as privately-owned timberland, logging contractors and the Herty Advanced Materials Development Center.

- Maintain environmental industry best practices with Master Timber Harvester-certified timber harvesters and procurement foresters.
- Expand globally by exporting biomass through the Port of Brunswick and transporting wind energy cargo through the Port of Savannah.
- Increase productivity with a skilled workforce and customized workforce education programs that address industry needs.
- Connect with industry leaders through the Metro Atlanta Chamber's Clean Tech Leadership Council.
- Film & Television
  - Georgia is a Camera-Ready state, with highly desirable financial incentives, location diversity, production resources and professional support to make any size production a true success.
  - Qualifying productions receive a 20% tax credit, plus an additional 10% credit for embedding a Georgia promotional logo in film title or credits.
  - From the mountains, forests, farmland, swamps and coastal regions to urban landscapes, small town charm and every type of architecture, thousands of accessible locations are available for film production.
  - With more than 800 film and television projects 1972, Georgia owns one of the deepest, most-experienced and affordable crew bases in the country, with more than 30,000 working professionals.
  - Over 1,000 production suppliers and support vendors ensure competitive pricing, availability and quality production.
- Financial Services
  - Identify opportunities to expand business in the U.S. and abroad.
  - Access talent from Georgia colleges and universities, and continually develop employees through customized workforce education programs at no cost.
  - Reduce costs with five years of tax credits for job creation and a premium tax rate of 2.25 percent on gross direct premiums received by insurers.
- Food Processing
  - Ensure speedy and efficient distribution of products with access to 12 major distribution centers, 60-plus warehouses, more than 100 motor freight carriers and extensive rail and highway systems.
  - Access top talent from top universities and technical colleges, continually develop employees with Quick Start's customized training at no cost.
  - Establish and develop new business opportunities in the United States and around the world.
- Headquarters
  - Mitigate business risk with Georgia's AAA bond rating.
  - Expedite the commercialization of innovations with the Georgia Centers of Innovation.
  - Achieve competitive advantages in workforce, logistics and innovation with access to an advanced transportation and logistics infrastructure, a quality lifestyle, a low cost of living, and a world-class education system.
  - Capitalize on a global-minded business culture.
  - Significantly lower their tax burden.
- Information Technology
  - A talent pool from nationally ranked programs at the Georgia Institute of Technology and Georgia State University.
  - Connectivity through 500,000 fiber-optic lines, including the country's two largest fiber-optic trunk routes.

- Resources such as the Center of Innovation for Information Technology that help Georgia companies develop and commercialize new products and technologies.
- Life Sciences
  - Companies can connect to industry leaders, ground-breaking technologies, nationally ranked colleges and universities, a diverse population for clinical research and an experienced pool of scientists, technicians and production talent.
- Logistics & Transportation
  - Expedite delivery to domestic markets by extensive rail systems and access to four major U.S. interstate highways.
  - Connect with customers around the world through flights from the world's busiest and most efficient passenger airport.
  - Export goods to 209 countries and territories across the globe via deep-water sea ports in Savannah and Brunswick.
  - Develop new business, tap into intellectual capital and access technology research through the Center of Innovation for Logistics.
  - Maintain a competitive workforce through Georgia's various academic programs and customized training needs.
  - Leverage nine general purpose Foreign Trade Zones across the state to reduce delays, and in some cases, eliminate tariffs on imported items.
- Manufacturing
  - Manufacturing companies in Georgia can lower their costs, take leaps in innovation and secure business advantages. Our extensive market knowledge, resources and supplier connections help manufacturing companies streamline their processes, maximize productivity and accelerate revenue growth.
- Tourism
  - Ensure high consumer and business traffic by positioning themselves at the crossroads of north-south and east-west travel in North America.
  - Lower operating costs with electrical power costs well below the national average.
  - Establish operations in a proven consumer and business market that generates a strong and steady flow of in-state, out-of-state, and international tourism visits.
  - Rely on Hartsfield-Jackson Atlanta International Airport, the world's most traveled and most efficient airport.
  - Utilize nine Regional Tourism Project Managers for assistance and expertise.
  - Have professional tourism specialists greet more than 13 million visitors at Georgia's front porch, our 12 visitor information centers.
  - Post special offers on the state's tourism website ExploreGeorgia.org and the mobile travel guide.
  - Promote destinations or services through the Georgia Travel Guide, Georgia Eats culinary guide, more than 10 social media platforms, Group Tour Planner, 1-800 VISIT GA, ExploreGeorgia.org, mobile travel guide, press releases, domestic and international trade shows, state-wide advertising campaigns, e-newsletters and more.

## **Campaigns**

- Multi-channel marketing strategies (events, direct mail, web, earned media and traditional advertising) for targeting site consultants and company executives.
- Heavy use of thought leadership via videos, case studies and whitepapers.

- Robust research team that can respond to any location advisor and/or corporate executive
- Newsletters – information that includes editorial on specific companies. The government is not telling the story rather companies are telling the story.
- Wheel marketing – the hub is the state and the regions are the spokes each telling their own story
- *Real Companies, Real Executives, Real Success Campaign* – a campaign using existing companies and letting them speak for themselves.

## Tactics and Approach

### Key Messaging

- Operating environment
  - Georgia is the #1 State for Business (2013-2017) by Site Selection Magazine.
  - In Georgia, businesses have direct air access to 75 countries and 150 U.S. cities.
  - Georgia has the nation’s #1 ranked workforce training program.
  - Georgia is home to more than 3,500 international firms, and 65-plus nations operate consulates, trade offices and bi-national chambers of commerce in Georgia.
  - The state ranks #3 in Growth Entrepreneurship (Kauffman Foundation, 2017).
  - The state scores an “A” for small business friendliness (Thumbtack, 2017).
- Talent
  - Nearly 30% of Georgians have at least a bachelor’s degree.
  - More than 1 in 10 Georgians have a master’s degree or higher.
  - Georgia is the top ranked state in the U.S. for highest percentage of female-owned firms (40.5% of total state firms). Washington D.C. ranked higher than any states at 42.7%.
  - The percentage of minority-owned firms (40%) exceeds the national percentage.
  - Georgia remains one of the fastest-growing states in the U.S. Its 10-year growth rate of 10.5% is more than 1.5 times that of the U.S. population growth rate.
- Quality of life
  - The state’s diverse population, the blend of city and country atmosphere, and the widely varying topography all contribute to a unique lifestyle and array of experiences unmatched by other states.
  - The Georgia lifestyle is made affordable by below-average housing costs, low taxes and a cost of living that is lower than many U.S. cities.

## Digital

- Social media footprint and followers
  - Facebook, 15,614 followers, <https://www.facebook.com/gdecdd>
  - Twitter, 23,900 followers, <https://twitter.com/gdecdd>
  - LinkedIn, 12,383 followers, <https://www.linkedin.com/company/georgia-department-of-economic-development/>
  - YouTube, 618 subscribers, <https://www.youtube.com/user/GeorgiaBusinessUSA>
  - Instagram, 1,543 followers, <https://www.instagram.com/gdecdd/#>



- Georgia.org was visited 1,025,812 times by 704,930 unique users in 2017.
- Website content is tailored by international market (13 international markets targeted) with translation when needed.
- Digital programs that are nimbler. Course corrections can be made more quickly than more traditional campaigns. A/B testing, geo targeting, demographic targeting and programmatic advertising are often used.
- Website contains industry specific contacts including photo and contact information on each page.
- Specific emphasis placed on video highlighting industry success stories. Additionally, to promote Georgia Ready for Accelerated Development (GRAD) sites, GDEcD is capturing each site with high-resolution aerial videography.



<http://www.business.ca.gov/>

## **Organizational Structure**

The Governor's Office of Business and Economic Development (GO-Biz) was created by Governor Edmund G. Brown Jr. to serve as California's single point of contact for economic development and job creation efforts. GO-Biz offers a range of services to business owners including attraction, retention and expansion services, site selection, permit assistance, regulatory guidance, small business assistance, international trade development, assistance with state government.

GO-Biz is led by Executive Director Panorea Avdis and Chief Deputy Director William Koch. The organization is divided in ten units based on services provided. Each unit is led by a Deputy and Assistant Deputy Director, and supported by senior staff.

- California Business Investment Services (CalBis): 7 staff
- California Competes Tax Credit: 8 staff
- Communications: 1 staff
- External Affairs: 1 staff
- International Affairs and Business Development: 3 staff
- Legal Affairs: Vacant
- Legislative Affairs: 1 staff
- Permit Assistance Unit: 5 staff
- Small Business Assistance and Innovation: 4 staff
- Zero Emission Vehicle (ZEV) Infrastructure: 3 staff

Total staff: 35

The California Business Investment Services (CalBIS) Unit provides no-fee, tailored site selection services to employers, corporate real estate executives, and site location consultants who are considering California for relocation and/or expansion.

While the organization does have a division dedicated to international affairs and business development, GO-Biz only operates one office internationally, their China Trade Office in Shanghai, China. The office focuses on promoting trade and investment between the state and China, helping Chinese companies start and expand in California. It is financed entirely free of state funding, largely through the donations of private enterprises and through matching grants from trade-focused federal programs.

GO-Biz is structured to promote the state for business investment with an emphasis on job creation. The office is affiliated with Visit California, the state organization structured to promote tourism.

GO-Biz does not participate in marketing efforts itself, but sponsors a separate organization, TeamCalifornia, that serves as a marketing outreach and business development organization. TeamCalifornia is a statewide non-profit supported by business and public-sector members and sponsors including, GO-Biz, multiple utility companies, and county economic development organizations. TeamCalifornia helps cities, counties and EDO's bring their brand to the marketplace for company retention and expansion, as well as new company locations.

When a company reaches out to relocate or expand in California, GO-Biz offers comprehensive confidential site selection services tailored to meet the needs of individual companies.

## **Objectives**

In 2012, GO-Biz was restructured to put a stronger emphasis on job creation and promoting the state for business investment.

## **Target Audience(s) and Sectors**

### *Target Sectors and Key Messaging*

- **Aerospace and Aviation**
  - 203,000 Jobs – The highest levels of employment and wages in America aerospace industry
  - \$61.6 Billion in revenue – The California aerospace industry produces the same amount of revenue as the combined industries of agriculture and arts and entertainment in California
  - California employs 30% of the NASA workforce.
  - Global Aerospace leader – 9% of the global space and aircraft market is generated in CA; encouraged by an ecosystem of companies in a leading global position and providing innovative opportunities for a highly skilled workforce.
- **Advanced Manufacturing**
  - CA chosen to host several sites for Manufacturing USA, a U.S. government initiative that is devoted to advanced manufacturing.
  - 1.3 million jobs – California manufacturing jobs employ 8% of the nonfarm workforce in California.
  - \$239 billion GDP output – Manufacturing firms produced more than 10% of the total gross product in CA.
  - 36,300 manufacturing firms – California's manufacturing industry draws and supports a high number of manufacturing firms.
  - Manufacturing accounts for over 23% of California's economic output.
- **Agriculture Technology**
  - CA is the fifth largest supplier of food and agricultural commodities in the world; and largest agricultural economy in the United States.
  - 400 commodities – CA produces over 400 different commodities and grows almost half of all fruits, nuts, and vegetables in the United States.
  - \$54 billion food production industry – CA is #1 in agricultural revenue in the U.S., accounting for 12 percent of the nation's food output.
  - CA farms and ranches occupy 25% of California's landmass.

- Mild Mediterranean climate is conducive to the production of crops that are difficult to grow elsewhere.
- National leader in wine production – 88.5% of the nation’s wine comes from CA.
- Clean Energy
  - National leader in clean technology innovation through the implementation of green buildings, clean transportation, clean technology research, and carbon management.
  - National leader in zero emission vehicle (ZEV) initiatives.
  - 338,000 jobs – CA employs more people in green jobs than any other state in America.
  - 256,000 GWh of Retail Sales – Renewable facilities in CA generated more than 256,000 gigawatt hours in retail sales to CA customers.
  - \$2.2 billion venture capital investments – CA invests more in sustainable energy ventures than all of the other 49 states combined.
  - CA solar electricity generating capacity is nearly half of the entire nation’s capacity.
- Bio/Life Sciences
  - Four major life science mega-centers that promote cutting-edge research and innovative solutions to world’s most challenging problems.
  - 884,000 jobs – the life sciences create over 884,000 direct, indirect, and induced jobs in state.
  - \$4.4 billion in venture capital – private firms in the life sciences have access to generous sums of venture funding in CA.
  - \$147 billion revenue – CA life sciences companies currently numbering 3,040, have developed 1,269 drugs and 264 new devices. The industry produced \$147 billion in revenue in 2015.
- Logistics
  - Port of Los Angeles is North America’s leading seaport by container volume and cargo value.
  - 891,000 jobs – CA leads the nation with the highest number of people employed in transportation and material-moving occupations.
  - 3.8 million tons of goods – CA transports 3.8 million tons of CA-made goods per day.
  - \$16.2 million revenues – CA collects more revenues for transportation (by highway, transit, air or water) than any other state.
- Retail
  - CA retail industry employs nearly one-fifth of CA’s workforce, and boast more than 164,000 stores that produce sales of over \$571 billion every year.
  - One of the top nine industries driving CA’s GDP growth.
  - California Retailers Association is a statewide agency that represents the entire spectrum of retailers, keeping an eye on legislation and advocating on behalf of retailers in the state.
- Tourism
  - 1 million jobs – the tourism industry in CA employs over one million people who earn a total of \$41.3 billion in wages.
  - \$122.5 billion in revenue – tourism in CA generates billions of dollars of revenue per year.
  - 263.4 million visitors.
- Technology
  - CA is the tech capital and cyber capital of the world, employing more than one million people.
  - 1.6 million jobs – the CA tech industry employs well over one million people. Tech jobs account for more than 10 percent of CA’s economy.
  - \$152 billion tech wages – the tech industry in CA pays over 150 billion in salaries and wages per year.

- 46.3 thousand tech companies – CA leads the nation, with almost 50,000 tech companies based in the state.
- Medical Devices and Manufacturing
  - 270,000 jobs
  - \$101 billion dollars earned – the biomedical industry in CA is a key factor in sustaining growth throughout the state.
  - 391 Small Business grants – scientists who make discoveries often start their own companies to carry their research forward. CA leads the nation in National Institutes of Health (NIH) small business grants that equaled \$146 million in 2014.

## **Tactics and Approach**

Participation in industry events/hosting special events

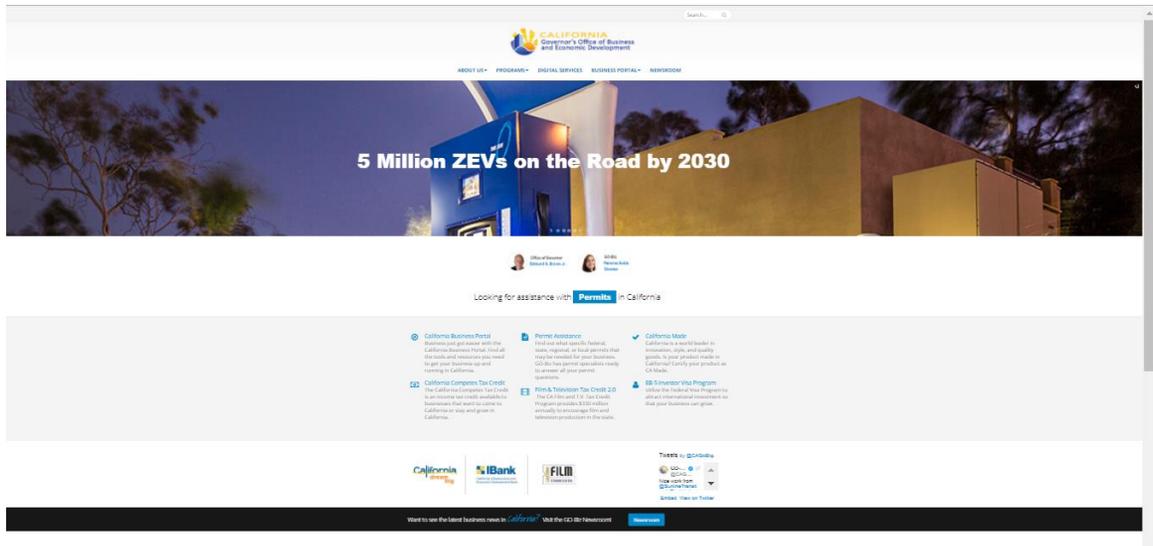
- IAMC
- BIO International
- SelectUSA

Key Messaging

- Operating environment
  - “California offers unparalleled business advantages to companies seeking the optimal business location. California’s critical mass of intellectual capital, financial acumen, business services, transportation systems, and market access enhance the corporate mission. These unique assets make it the most efficient place to do business and the most profitable place to do business in the world.”
- Talent
  - “California is home to the most diverse and integrated population in the world. This diverse demographic brings the influence of different cultural perspectives in business environments. Prestigious universities draw local talent, as well as young talent from all over the United States and the world. Many of these students, who are some of the brightest and best, stay and build careers in California. The state also draws seasoned professionals who choose California because of its opportunities, weather, natural beauty, and culture.”
  - “The California workforce is highly trained and diversified. These dynamics create a highly competitive advantage for companies looking to establish in the Golden State.”
- Quality of life

## **Digital**

- Social media footprint and followers
  - Facebook: [www.facebook.com/CAGOBiz](http://www.facebook.com/CAGOBiz), 2,486 followers
  - Twitter: [www.twitter.com/CAGoBiz](http://www.twitter.com/CAGoBiz), 5,267 followers
  - LinkedIn: [www.linkedin.com/company/california-governor's-office-of-business-and-economic-development/](http://www.linkedin.com/company/california-governor's-office-of-business-and-economic-development/), 530 followers



- Overall set up of website (ease of navigation; use of external databases etc.)
  - Business.ca.gov – the main website for GO-Biz provides a basic overview of the organization, its executive leadership and the various programs supported by GO-Biz.
  - Within the top menu, visitors can access the GO-Biz Business Portal. The Business Portal details resources available to business looking to relocate/expand or start in California.
  - The website hosted by GO-Biz are business oriented, offering very little in terms of marketing messages.
  - The TeamCalifornia website (the marketing arm of GoBiz) offers more marketing information, including key industries, and information on the state’s economic and social environment.
- Contact information provided
  - Contact information provided for the various senior-level staff throughout GO-Biz’s units.
  - Generic ‘contact’ email form on website
  - TeamCalifornia offers a single contact phone and email



<http://intersectillinois.org>

### **Organizational Structure**

Intersect Illinois started in 2016 by executive order of Governor Rauner and is a nonprofit organization, funded entirely by private donations. Intersect Illinois works with the Illinois State Department of Commerce and Economic Opportunity to market the state to businesses and help negotiate state incentives. Intersect Illinois is wholly dedicated to business development.

The organization was launched in response to a lack of government resources dedicated to economic development efforts. While Intersect Illinois operates as an independent entity, the Department of Commerce and Economic Opportunity has final authority over the execution and monitoring of grants and incentives, and all negotiations made on behalf of the Department are subject to public disclosure. In addition, to avoid conflict of interest, any director or donor whose company seeks any grant or incentive will work with the Department, not Intersect Illinois.

Intersect Illinois employs nine full-time staff and is projected to grow to 15 in 2018. It operates under a board of directors with eighteen sitting directors. Full-time staff include, President Mark S. Peterson, Senior Vice President Brent Case, Co-Founder and Chief Operating Officer Andria Winters, and Chief Marketing Officer Kelly Nicholl.

### **Objectives**

*Mission:* Intersect Illinois operates to “less the burden of the government of the State and perform economic development functions to increase the State’s competitiveness for job creation and investment for the exclusive benefit of the people of the State.”

Primary goals/metrics:

- New job creation
- Capital investment
- Increase project pipeline (For every 40 inquiries, the organization has found that will land one project. If they can get to the site visit stage, they have a one in four success rate).

### **Target Audience(s) and Sectors**

*Target Audiences*

Intersect Illinois markets to both in- and out-of-state businesses, encouraging out-of-state businesses to locate to Illinois, and retaining and fostering existing businesses.

International Efforts: Canada, Japan, UK and Germany are the top targets largely due to the number of companies located in Illinois that are headquartered in those countries.

### *Target Sectors and Key Messaging*

- Advanced Manufacturing
- Agribusiness & Food Processing
  - Illinois is the biggest producer of agricultural products
- Transportation, Distribution & Logistics
  - “Finest transportation and logistics network in America”
  - “One of the largest interstate networks in the world”
  - “All seven of the country’s Class 1 freight railroads, carrying 50 percent of all product transported by rail in the country, move through Illinois.”
- Life Sciences & Biotechnology
  - “Home to America’s premier national laboratory for particle physics and accelerator research”
- Business & Professional Services
  - “The third fastest tech growth in the country according to CBRE”
  - “13 technology parks and 87 incubators and accelerators to grow ideas into a business”
- Energy

### **Campaigns**

Intersect Illinois firmly believes that Illinois has made the error of allowing other people to tell their story and their top priority is establishing one-on-one relationships with 1,000 key influencers, corporate executives and consultants. From that starting point, they will focus on their digital presence.

Intersect Illinois will conduct three familiarization trips for site selectors, as well as events in Chicago, Atlanta, and Dallas. A strategy that has worked well in the past has been to have the Governor involved in these events as it changes the entire tone of the mission.

### **Tactics and Approach**

#### Key Messaging

- Operating environment
  - Low Corporate Income Tax Rate Illinois - 5.25%
  - Low Personal Income Tax - 3.75%
  - Low Commercial Energy Rates - 8.72 cents/kWh
  - Tax-Free Personal Property
- Talent
  - 192 Higher Education Institutions Statewide
  - Over 825,000 Midwest Higher Education Graduates Annually
  - 6.6 Million Person Labor Force & 38% with Associate’s Degree or Better

- University of Illinois Graduates More Engineers each year than MIT, Stanford, and Cal Tech Combined
- #1 Metro for Big Ten Alumni - Choose Chicago
- #1 Marketing Graduate Program - Kellogg School of Management
- #1 City for Recent Grads - GradSpot.com
- 2 Top 20 Universities in U.S. - University of Chicago & Northwestern University
- Top 5 Computer Science/Engineering at University of Illinois - U.S. News
- Top 5 for Engineering Research Expenditures - U.S. News
- Top 5 for Best Prepared Students - Wall Street Journal
- Among Top 10 Universities in the World - University of Chicago
- Nearly 500,000 Big Ten Alumni in Illinois
- Quality of life
  - Quality education and healthcare for families
  - Abundant outdoor amenities
  - A state for sports
  - Magnificent arts & culture
  - Endless nightlife & entertainment
  - World class dining & hotels
- World Class Infrastructure
  - 5 international airports that can get you anywhere in North America within 4 hours
  - Illinois is the only state that has all seven Class I freight railroads
  - Chicago is the #3 largest intermodal port in the world
  - Illinois has the 3rd largest interstate highway system in the U.S.
  - Illinois has 2 major inland ports and 14 waterway ports
  - 5th largest economy in the United States, and 17th largest economy in the world.
  - Thriving Entrepreneurship & Innovation Ecosystem
  - World Class Research and Innovation Hubs

## Digital

- Social media footprint and followers
  - Facebook, 112-page likes, 114-page followers - <https://www.facebook.com/intersectillinois/>
  - LinkedIn, 71 followers - <https://www.linkedin.com/company/intersectillinois/>
  - Twitter, 272 followers - <https://twitter.com/intersectillin1>
- Intersect Illinois is currently undertaking a comprehensive overhaul of its website which it will launch later this year. As it currently stands, the website is not particularly comprehensive in that it only includes a list of Staff members and board of directors with no contact information, a “Why Illinois” page that includes various facts and figures about the state’s business and living environment, FAQs about the structure of the organization, success stories, and public documents including the executive order, Articles of Incorporation, By-laws and meeting minutes.
- Email box at bottom of screen to contact [marketing@intereseectillinois.org](mailto:marketing@intereseectillinois.org)
- Newsletter sign-up option