



ONE COLUMBUS

Partners for Regional Growth & Prosperity



THE
COLUMBUS
REGION

THE COLUMBUS REGION

The Columbus Region is a dynamic 11-county metropolitan area in the midst of unprecedented economic growth. The Region is home to today's leaders and is at the forefront of the industries of tomorrow, from advanced manufacturing to smart mobility research and development.



Delaware
Fairfield
Franklin
Knox

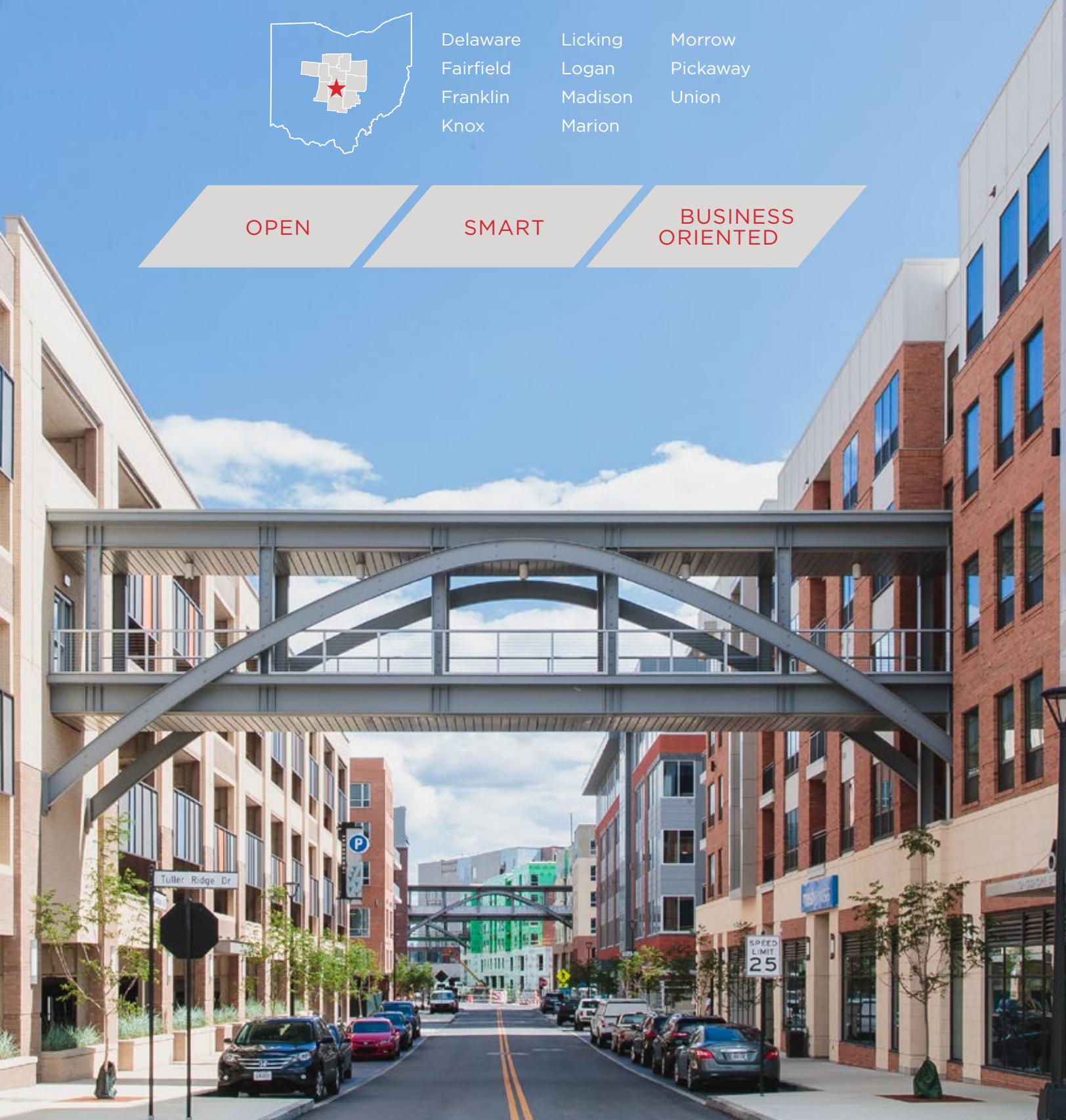
Licking
Logan
Madison
Marion

Morrow
Pickaway
Union

OPEN

SMART

BUSINESS
ORIENTED



The logo features the word "ONE1" in white text on a red rectangular background. Below it, the word "COLUMBUS" is written in a bold, black, sans-serif font. The letter "U" in "COLUMBUS" is red and has a small black star above it.

ONE1 COLUMBUS

Partners for Regional Growth & Prosperity

A faded background image showing a woman on the left side of the frame, wearing glasses and a light-colored top, pointing her right hand towards a wall covered with various papers and sticky notes. Another person's head is partially visible on the right side of the frame.

—

The One Columbus mission is to lead a comprehensive regional growth strategy that develops and attracts the world's most competitive companies, grows a highly adaptive workforce, prepares our communities for the future, and inspires corporate, academic and public innovation throughout the 11-county Columbus Region.



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THE BEGINNING

The Columbus 2020 Story Started With You



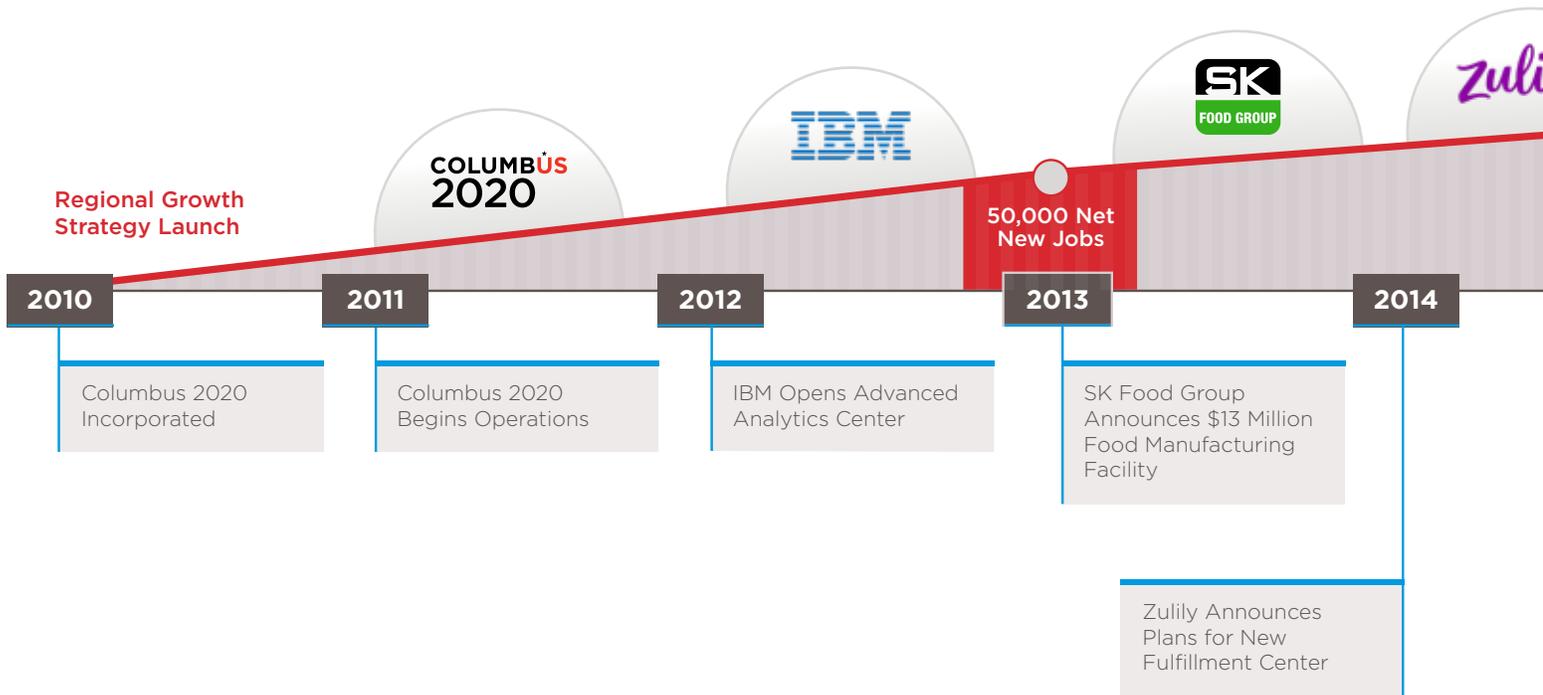
A REGIONAL REVIVAL

As summer turned to fall in 2007, Central Ohio was in the midst of a decade of stagnant job growth, diminishing per capita income figures and an undistinguished economic development profile. Columbus was considered just another metro area succumbing to the headwinds of the decline of the Midwest. In December of that year, the housing crisis and the global recession hit, washing away any gains that had been made in that decade.

Leaders around the country gathered to consider their economic future, including in Central Ohio. What would our future be and how would we claim it? How could we leverage the great companies that had been built here, the ambition of local entrepreneurs and the power of our world-renowned institutions?

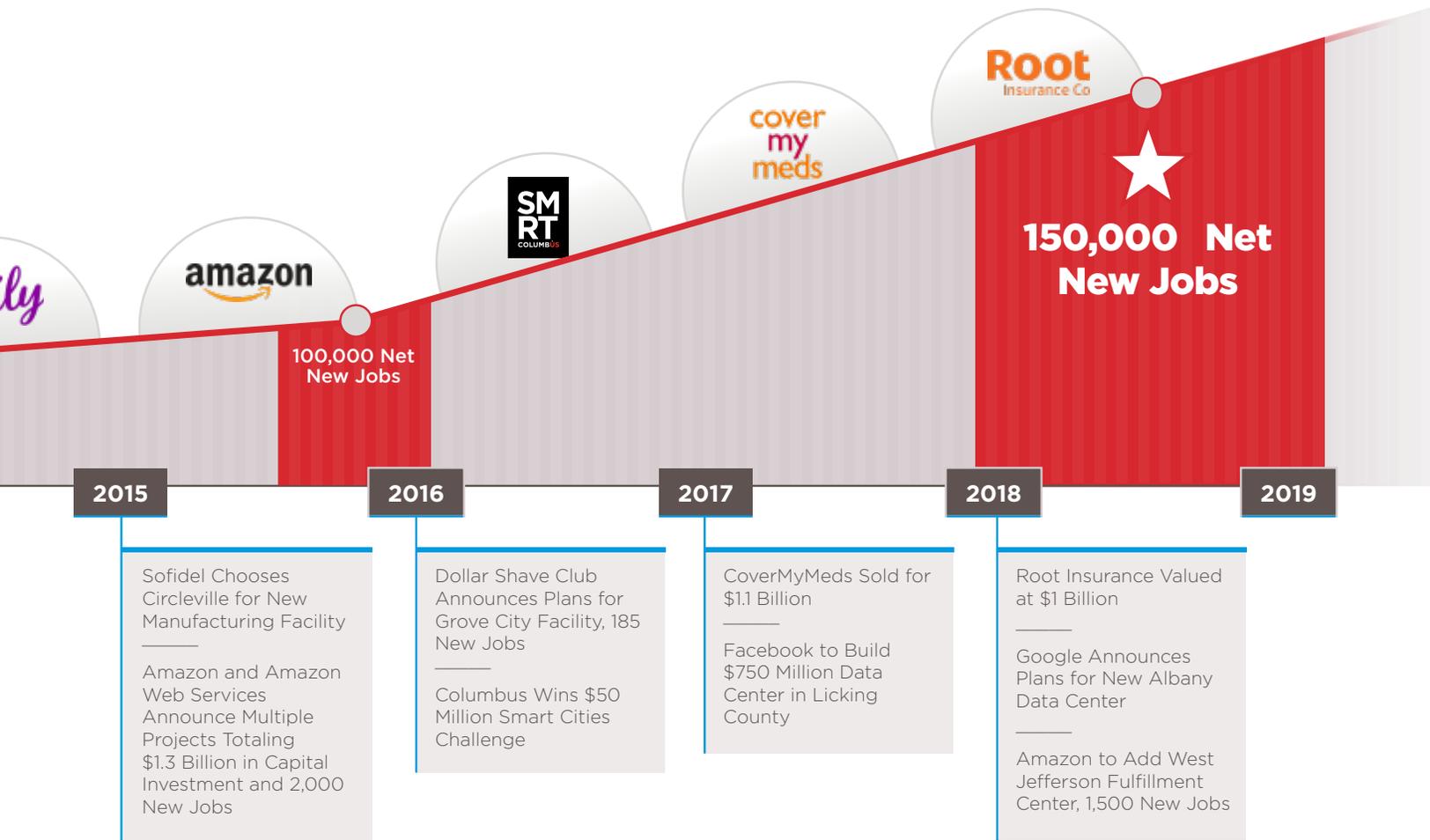
A new path was created based on the dire need for economic activity and job growth, and became more important as each day passed. A new platform was needed to bring focus to these efforts to go to market as the Columbus Region, and to stake our claim as one of the most powerful metropolitan economies in the United States. Audacious, measurable goals were set to define the mission of the work, and the stakes were high.

The journey of the next decade included transformational project announcements, notable entrepreneurial achievements and the greatest expansion of the Columbus Region economy in its history. A decade later, the Columbus Region has



not only achieved the job, investment and income goals it set, but has also earned distinction as a metro area with boundless ambition and economic potential.

For those reasons and more, we can and should celebrate, but we cannot pause. 2020 is a mile marker, not a destination. So, we redouble our efforts and attack the next 10 years with the same enthusiasm and ambition that fueled our work in 2010.



RESULTS

The Columbus Region has emerged as a beacon of economic competitiveness and population growth equal to any in the country. As this decade ends, the Columbus Region is surging beyond its goals, and is considered a national model of economic development success and collaboration. With each company expansion, each investment announcement from a new company and each company formed in the Region, our communities prosper and our lives are changed for the better.

In less than 10 years, the Columbus 2020 Regional Growth Strategy ...

created over
150,000
net new jobs



secured over
\$8 billion
in capital investment



sparked a
30% increase in
personal
per capita income



No. of Projects:
500+



Total Payroll:
\$2.0B



Capital Investment:
\$8.5B

“ Columbus is the #1 rising city for startups and the top emerging city for venture capital.”

FORBES

“ Columbus isn't the next business destination; it's already happening.”

INC.



= \$23.8 BILLION
economic impact

“The Columbus Region is experiencing the strongest decade of economic growth in its history, surging past what we once thought was possible. The broad-based growth we are seeing across the 11 counties and in core industries has lifted many businesses, communities and individuals.”

**PABLO VEGAS,
Chairman of the Board of Directors, Columbus 2020**



THE PROCESS

Your Input Defined the Path Forward

WE LISTENED

The past year has included hundreds of meetings, conversations and forums to discuss the future of our region. What are we anxious about? What is our new ambition? What does the future hold for this great region? Business leaders, public officials and civic advocates were engaged to discuss these concerns and what success looks like for the 11-county Columbus Region.

LEADERSHIP ASSESSMENT

Spring 2018



60
business leaders



From
45
organizations



Representing
22
industry sectors

STAKEHOLDER & CIVIC GROUP DISCUSSIONS

Summer 2018



We met with
200+
business & civic leaders
and board members



Representing
50+
local economic
development
partners

This research and the conversations it sparked have exposed common interests and priorities that have helped to identify our path forward.

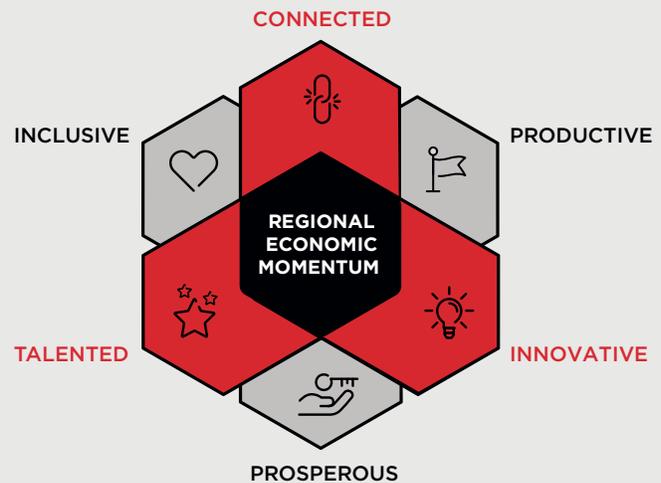


ANALYSIS AND INSIGHTS

As in years past, the Columbus Region focused on the hard facts. Objective, comparative research revealed where we are strong, where we need to improve and where we are lagging behind. Analysis was conducted to address how prepared the Region is to meet the challenges of the future. Rapidly changing technology, global competition and demographic shifts are sure to have an impact on the Columbus Region, and the strategies and tactics that have worked in the past will not yield the same results going forward.

COMPARATIVE RESEARCH

As we build upon the successes achieved during the past decade, Avalanche Consulting, a national economic development consultancy, identified six areas critical to the economic vibrancy of a region — **connectivity, productivity, prosperity, innovation, talent** and **inclusivity**. While an economically vibrant region may not rate especially high in each and every measure, rare is the region that can succeed in the face of consistently poor performance across any one element. To succeed going forward, we must focus on these areas.





Consistent themes emerged from the stakeholder meetings and research. It became clear that in order to achieve a new ambition and meet both existing and emerging challenges, Columbus Region communities, leadership and institutions will need to focus on four imperatives to achieve success.

1 WE MUST

Sustain Our Economic Momentum

by continuing to make economic growth and prosperity a top priority.

2 WE MUST

Develop, Inspire and Attract a Talented, Adaptive and Diverse Workforce

to compete for investment.

3 WE MUST

Enable the Innovation Capacity

of business, academic and government sectors to grow dynamically.

4 WE MUST

Increase Global Identity and Connectivity

to attract investment and talent from around the world.



1 SUSTAIN OUR ECONOMIC MOMENTUM

by continuing to make economic growth and prosperity a top priority.

Success breeds confidence, and confidence fuels momentum — a necessary component to the next phase of the Region’s growth. To compete for talented people and strategic investment, there must be a strong case that we are getting stronger, more innovative and more diverse.

The challenge: Over the last decade, the Region accomplished its economic development goals and outperformed other Midwest metros across many metrics. To continue this remarkable level of momentum, we must amplify our successes, apply resources and redouble our efforts.

- The Region must consistently invest in and execute a comprehensive economic development strategy in order to compete and to be ready for opportunities that emerge.



#1 THROUGHOUT THE MIDWEST
Job Growth
U.S. Bureau of Labor Statistics



#1 THROUGHOUT THE MIDWEST
GDP/GRP
U.S. Bureau of Economic Analysis



#1 THROUGHOUT THE MIDWEST
Population Growth
U.S. Census Bureau



#1 THROUGHOUT THE MIDWEST
Millennial Migration
Brookings Institution



2 DEVELOP, INSPIRE AND ATTRACT A TALENTED, ADAPTIVE AND DIVERSE WORKFORCE

to compete for investment.

The Columbus Region is younger and more educated than the national average, leading Ohio and the Midwest in both population and millennial growth. We boast one of the highest concentrations of higher education institutions and an in-demand, tech savvy workforce.

The challenge: There are stubborn disconnects between demographics and outcomes, and we must work to eliminate these disparities. There is an insatiable appetite for skilled workers, and we must meet the challenges presented by automation. It will be necessary to become far more diverse, engaging

across rural and urban areas and minority communities, while also attracting talent from across the world.

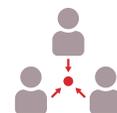
■ A talented workforce is the most critical location factor for our existing companies and for those who seek to locate here.



#1 city for college graduates
SmartAsset



35.9% of the population 25+ holds a bachelor's degree or higher



#12 in the United States and #1 in the Midwest for net migration of ages 25-34



3 ENABLE THE INNOVATION CAPACITY

of business, academic and government sectors to grow dynamically.

The Columbus Region is home to 15 Fortune 1000 companies, billion-dollar startups, and a strong education ecosystem. Corporate, academic, government, medical centers and R&D operations in our region are at the forefront of research and innovation. Research expenditures at The Ohio State University totaled more than \$850

million in 2017, ranking it among the top 25 universities in the United States.

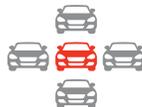
The challenge: As technology advances and automation increases, threats to the existing ecosystem have emerged. Fortune 1000 companies in the Region must adapt as innovative competitors

become a threat. The higher education system is being challenged to not only deliver a talented workforce, but also comprehensive research. Government entities are undergoing a massive shift in technologies to serve citizens and to achieve status as smart cities.

■ To grow dynamically and to diversify our economy, we must create, use and leverage technology.



#1 city for tech workers
SmartAsset



Home to the Transportation Research Center, the largest independent proving grounds in the Americas



\$484.68 million of venture capital invested in Columbus in 2018 across 61 companies



4 INCREASE GLOBAL IDENTITY AND CONNECTIVITY

to attract investment and talent from around the world.

The Columbus Region has worked hard to establish its identity and increase brand awareness, regionally, nationally and internationally. This has helped to attract both investment and talent, including hundreds of foreign-owned firms. Opportunities abound for

companies to accelerate export and foreign direct investment (FDI) growth.

The challenge: It's critical that we connect our communities and companies to both each other and the rest of the world via infrastructure, including broadband.

While we connect the Columbus Region economy with others, we must also grow and elevate our brand. Expanding our reach to be globally known will help ensure continued economic growth.

■ The Columbus Region must be connected physically, digitally and intellectually with the rest of the world.



300+ foreign-owned organizations, including 115 Japanese businesses



Home to Rickenbacker International Airport, one of the world's only cargo-dedicated airports



Columbus has been recognized as the standard-bearer for collaborative visual identity



THE VISION

We Will Boldly Pursue a Shared Ambition



To be the **most prosperous region in the United States**

We emerged from the last decade in a new, better place, but those changes did not happen in a vacuum. The world changed around us, and the economic development landscape is far different and far more competitive than 10 years ago.

Building on the success of the past decade requires something more than an economic development plan. This will be a community-wide effort requiring a shared vision for a Columbus Region economy that enables prosperity for all. It will test our courage to change our approach even as we near the end of a decade of unprecedented economic growth.

PROSPERITY DEFINED:

The process by which more and more people in a region improve their economic and social well-being.



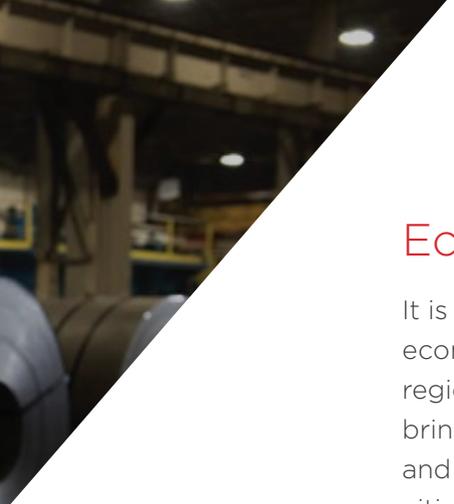
GROWTH



PROSPERITY

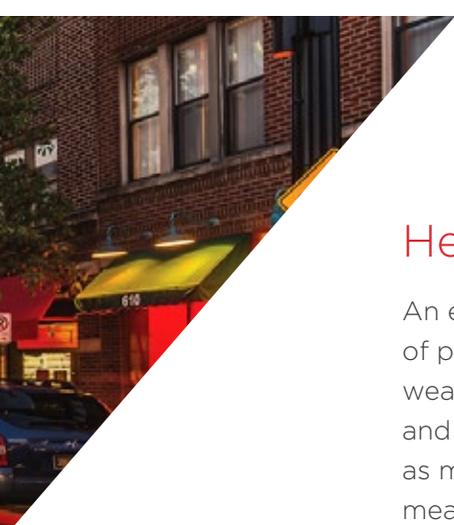


INNOVATION



Economic and infrastructure gains:

It is imperative that the Columbus Region continue to grow and diversify its economy. There are a variety of measures that include net new jobs, gross regional product and relative gains in the tax base. Economic base growth that brings new money into the Region is the primary driver of our ability to innovate and to build the needed civic infrastructure to improve the quality of life of our citizens and to build social safeguards for those with short- and long-term needs.



Health, wealth and education gains:

An expanding economy is a necessary prerequisite to increase the well-being of people and the health of our communities. However, if disparities in income, wealth, education and health are to improve, our region must take action above and beyond what we've traditionally done. Indicators include measures such as median wages, racial employment and labor participation, and community measures of housing opportunity, educational attainment, healthcare disparities, and the physical and economic mobility of the workforce.



Tech, innovation and investment gains:

The economy is driven by technology. The Columbus Region must leverage its unique position as a leading center of higher education, corporate investment and government operations to expand its economy and reduce both costs and disparities. Measures of government, business and academic innovation such as venture capital invested in our region, patent development, STEAM education and other indicators signal our capacity to meet the challenges of a disruptive economy.

OUR MISSION

A Singular Focus on Jobs and Economic Development



The One Columbus mission is to lead a comprehensive regional growth strategy that develops and attracts the world's most competitive companies, grows a highly adaptive workforce, prepares our communities for the future, and inspires corporate, academic and public innovation throughout the 11-county Columbus Region.

As we work together to realize our new vision, the One Columbus team is focused on providing the leadership and strategy needed to sustain and grow a vibrant region. Success over the next 10 years will be defined by accomplishing the following goals:

60k
jobs

We will secure 60,000 jobs in the Columbus Region.

Full-time jobs with benefits remain a powerful way to change lives and build sustainable communities.

\$3.3 billion
payroll

We will add \$3.3 billion of payroll in communities within the Columbus Region.

\$10 billion
investment

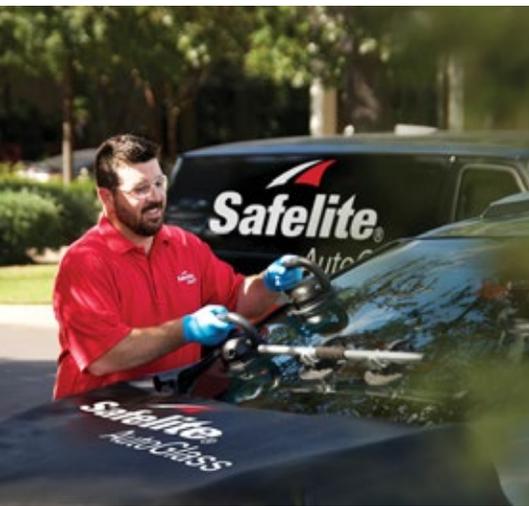
We will attract \$10 billion of capital investment to the Columbus Region from our economic base projects.

THE PLAN

FOUNDATIONAL STRATEGIES

The fundamental principles for growing the Region's economy are consistent: Retain, attract and create jobs that drive economic growth.

Serve Existing Businesses



Objective

To create the most competitive economic base in the United States

Attract New Businesses



Objective

To create the most diverse employment and tax base in the United States

Support Entrepreneurship And Accelerate High-Growth Firms



Objective

To create a seamless continuum of services for venture-backed startups and high-growth firms to scale within the Columbus Region

GROWTH ACCELERATORS

To amplify and accelerate our growth, we must look outside the Region and beyond the horizon.

Prepare Communities For The Future



Objective

To become the most prepared area in the United States for growth and investment

Increase Global Trade And Investment



Objective

To lead our peer regions in foreign investment and export growth

Market And Promote The Columbus Region Globally



Objective

To become known as the most prosperous economy in the United States

ECONOMIC SECTORS



OBJECTIVE

To increase employment and overall payroll in each economic sector over the next decade, we will focus on these key industries.



Objective

To maintain our role as a retail headquarters, services and technology leader

Objective

To increase our position as a leading logistics location by building global capabilities and diversifying our employment and facilities profile

Objective

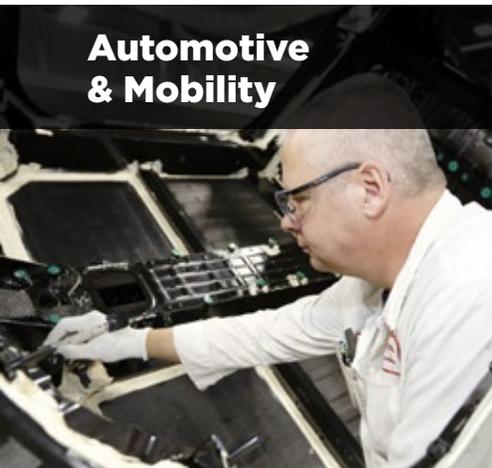
To increase our aggregate wages and diversify our finance and insurance industries



HQ & BUSINESS SERVICES



LOGISTICS



Automotive & Mobility



Bio-Medical & Health Services



Advanced Computing Services

Objective

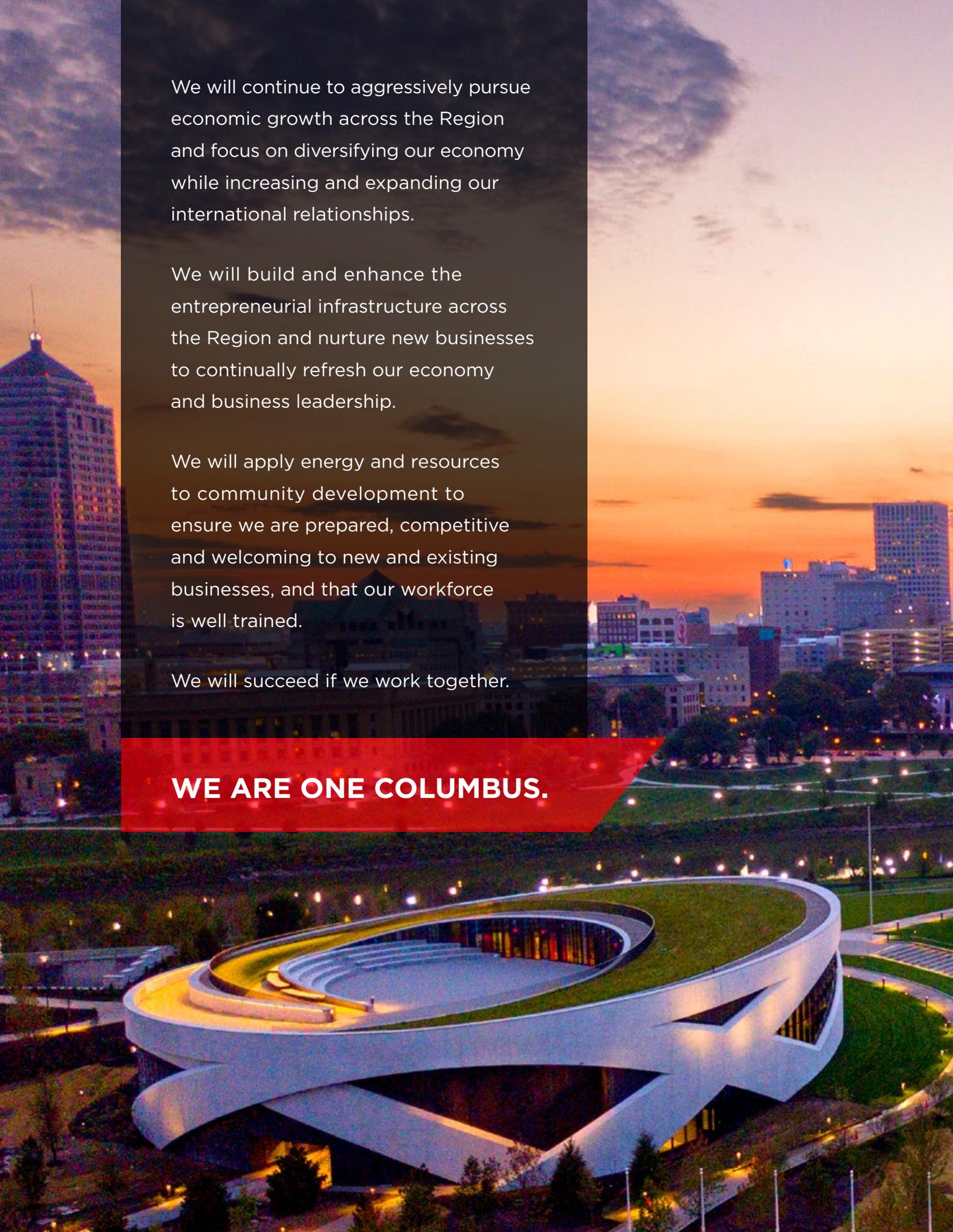
To diversify our portfolio of automotive and mobility suppliers and increase research and development services

Objective

To build a sustainable bio-medical and health services industry

Objective

To become one of the most significant advanced computing centers in the United States



We will continue to aggressively pursue economic growth across the Region and focus on diversifying our economy while increasing and expanding our international relationships.

We will build and enhance the entrepreneurial infrastructure across the Region and nurture new businesses to continually refresh our economy and business leadership.

We will apply energy and resources to community development to ensure we are prepared, competitive and welcoming to new and existing businesses, and that our workforce is well trained.

We will succeed if we work together.

WE ARE ONE COLUMBUS.



THANK YOU

TO OUR PARTNERS,
LEADERS AND INVESTORS



Board of Directors

Pablo A. Vegas, *Columbia Gas Group*
Eric Phillips, *Union County Economic Development Partnership*
Gregory R. Overmyer, *Overmyer Hall Associates*
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Kenny McDonald, CEcD, *One Columbus*
Sean Grant, *One Columbus*

State & Regional Partners

Columbus Chamber
JobsOhio
Mid-Ohio Regional Planning Commission
Ohio Development Services Agency
Rev1 Ventures
Smart Columbus
The Columbus Partnership

Local Partners

Area Development Foundation of Knox County
City of Canal Winchester
City of Columbus
City of Delaware
City of Dublin
City of Gahanna
City of Grandview Heights
City of Grove City
City of Groveport
City of Hilliard
City of London
City of New Albany
City of Pataskala
City of Pickerington
City of Upper Arlington
City of Westerville
City of Whitehall

City of Worthington
Delaware County
Fairfield 33 Development Alliance
Franklin County
Licking County Chamber/Grow Licking County CIC
Logan County Chamber of Commerce
Madison County Future Inc.
Marion CAN DO!
Mid-Ohio Development Exchange (MODE)
Morrow County
Pickaway Progress Partnership
Union County-Marysville Economic Development
Village of Obetz
Violet Township

Leadership Circle

Alliance Data Systems, Inc.
American Electric Power Company, Inc.
AT&T Ohio
Bank of America, National Association
Battelle Memorial Institute
Big Lots, Inc.
Bricker & Eckler LLP
Cardinal Health, Inc.
CBRE
Champion Companies
Chemical Abstracts Service
Columbia Gas of Ohio, Inc.

Columbus REALTORS
Columbus Regional Airport Authority
Columbus State Community College
Continental Office
Corna Kokosing Construction Company
CoverMyMeds LLC
Dawson Resources
Deloitte
Diamond Hill Capital Management, Inc.
Dispatch Media Group
Dispatch Printing Company
Encova Insurance
Ernst & Young
Fahlgren Mortine
Fifth Third Bank
Grange Insurance Company
Greif
Hollywood Casino Columbus
Honda Marysville
Honda of America Manufacturing, Inc.
Huntington Bank
Ice Miller, LLP
IGS Energy
JPMorgan Chase Bank
Lancaster Colony Corporation
L Brands, Inc.
M/I Homes, Inc.
Mount Carmel Health System

Leadership Circle (cont.)

Nationwide Children's Hospital
 Nationwide Mutual Insurance Company
 OhioHealth
 PNC Bank
 Porter Wright Morris & Arthur LLP
 Ruscilli Construction Co., Inc.
 SOLUTIONS Staffing
 Squire Patton Boggs (US) LLP
 The Scotts Miracle-Gro Company LLC
 The Columbus Foundation
 The Ohio State University
 The Ohio State University Wexner Medical Center
 Turner Construction Company
 US Bank
 VERTIV
 Vorys, Sater, Seymour and Pease LLP
 Worthington Industries, Inc.

Investors

3 Pillar Homes, LLC
 Abercrombie & Fitch Co.
 Accenture plc
 AC Hotel Dublin
 Adena Corporation
 Advanced Civil Design, Inc.
 Advanced Drainage Systems, Inc.
 AECOM
 Alterra Real Estate Advisors
 American Structurepoint Inc.
 Anderson Aluminum Corporation
 Anderson Concrete Corporation
 Anheuser-Busch InBev
 Anthem, Inc.
 Artina Promotional Products
 Ascena Retail Group
 Associated Insurance Agencies, Inc.
 Assurex Global Corp.
 Atlas Butler
 Bailey Cavaliere LLC
 BakerHostetler LLP
 Barnes & Thornburg LLP
 BDO USA LLP
 BMO Harris Bank
 Brexton LLC
 Buckeye Power, Inc.
 Bruner Corporation
 Builders Exchange of Central Ohio
 Building Industry Association of Central Ohio
 Burgess & Niple, Inc.
 Burns McDonnell
 Byers, Minton & Associates, LLC
 Calfee, Halter & Griswold LLP
 Cameron Mitchell Restaurants
 Capital University
 Carlile Patchen & Murphy LLP
 Casto
 Central Ohio Technical College
 Centric Consulting
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 Chemcote Roofing Company
 Chemcote, Inc.
 Clark, Schaefer, Hackett & Co.
 Clear Channel
 ClearPath Benefit Advisors LLC

Coldwell Banker King Thompson
 Colliers International
 Columbus Airport Marriott
 Columbus Business First
 Columbus Building Trades Council
 Columbus Coach, Ltd.
 Columbus Coal & Lime Company
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 Crane Group Co.
 Crawford Hoying
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 Cushman & Wakefield
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 Dublin Building Systems
 Dugan & Meyers
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 EclipseCorp, LLC
 EDGE
 Elford, Inc.
 EMH&T
 Express Employment Professionals
 EXXCEL Project Management, LLC
 Ferguson Construction Company
 First Commonwealth Bank
 First Financial Bank
 First Merchants Bank
 FirstEnergy Corp.
 Franklin University
 Frost Brown Todd LLC
 FST Logistics
 G & J Pepsi-Cola Bottlers, Inc.
 GBQ Partners LLC
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 Geotechnical Consultants Inc.
 Germain Motor Company
 Gilbane Building Company
 Hahn Loeser & Parks LLP
 Hamilton Capital Management, Inc.
 Hamilton Parker Company, LLC
 Haughn & Associates
 Heartland Bank
 Heath-Newark-Licking County Port Authority
 Heidelberg Distributing Company
 Hilton Columbus Downtown
 Hoffmann & Associates
 Insurance Services, Inc.
 Holbrook & Manter
 Homewood Homes, Inc.
 Humble Construction Co.
 Hyatt Regency
 Indus Hotels

Information Control Company LLC
 InnoSource, Inc.
 Interior Supply Inc.
 JDS Companies
 Jeni's Splendid Ice Cream
 Jezerinac, Geers & Associates, Inc.
 Jim Frey Real Estate Advisor
 John Gerlach & Company
 Jones Lang LaSalle Incorporated
 Kabil Associates, Inc.
 Kaufman Development
 Kegler, Brown, Hill & Ritter Co., L.P.A.
 KEMBA Financial Credit Union, Inc.
 Kenyon College
 KeyBank
 Kimball Midwest
 Kirk Williams Company
 KLH Engineers
 Kohr Royer Griffith, Inc.
 Kohrman Jackson & Krantz
 KPMG LLP
 LeadingEDJE
 Leftchannel
 Lehman Daman Construction Services, Inc.
 Lifestyle Communities
 Limbach
 Lindsay Honda/Acura
 LIVE! Technologies
 Loeb Electric and Loeb Lighting Services
 LOTH, Inc.
 M&A Architects
 Matrix PDM Engineering, Inc.
 McGohan Brabender LLC
 Mead & Hunt
 Medical Mutual of Ohio
 Mid-City Electric
 Miles McClellan Construction Company
 Mills James
 Mindstream Interactive
 Montrose Group
 Morgan Stanley & Co. LLC
 ms consultants
 NAI Ohio Equity
 Navigator Management Partners, LLC
 NBBJ, LLC
 NCT Ventures
 Norfolk Southern Corporation
 ODW Logistics, Inc.
 Ohio Dominican University
 Ohio University
 Ohio Wesleyan University
 Oswald Companies
 Otterbein University
 Overmyer Hall Associates
 Park National Bank
 Paul J. Ford & Company
 PEDCO E&A Services
 Peoples Bank
 Perez & Morris LLC
 Pillar Technology Group, LLC
 Plante Moran
 POLARIS Centers of Commerce
 Portfolio Creative
 Power Connect

Prater Engineering Associates, Inc.
 Preferred Living
 ProLogis
 Pulte Group, Inc.
 RED Capital Markets, LLC
 Redwood Acquisitions
 Renaissance Columbus Downtown Resource Development Group
 RevLocal, Inc.
 Robin Enterprises Company
 Rockford Homes
 Roetzel & Andress, LPA
 Ryan's Landscaping
 Rumpke
 S&ME
 Safelite Group, Inc.
 Sands Decker CPS, LLC.
 Schneider Downs & Co., Inc.
 Shumaker, Loop & Kendrick, LLP
 Sinclair Broadcast Group
 Solid Waste Authority of Central Ohio
 Solutions Staffing
 Sophisticated Systems, Inc.
 Spectrum
 State Auto Insurance Companies
 State Farm Insurance Company
 Steiner & Associates
 Stewart Title Company
 Stonehenge Partners, Inc.
 Suburban Steel Supply Company LLC
 Superior Beverage Group
 Taft Stettinius & Hollister, LLP
 Tanaka & Company
 Team Fishel Surveying and Engineering
 Telhio Credit Union
 Terracon
 The Daimler Group, Inc.
 The Energy Cooperative
 The Kleingers Group, Inc.
 The Kroger Co.
 The Memorial Tournament
 The New Albany Company
 The Painting Company
 The Pizzuti Companies
 The Refectory Restaurant & Bistro
 The Robert Weiler Company
 The Superior Group
 The Whiting-Turner Contracting Company
 thinkCSC
 Thomas & Marker Construction
 Trillium Staffing
 Valley Interior Systems
 VanTrust Real Estate LLC
 Vermont Energy Investment Corporation
 Vertiv Corporation
 Village Communities
 Vista Industrial Packaging
 Voya
 Wagenbrenner Development
 Wells Fargo Bank
 Whiting-Turner Contracting
 Wolfe Enterprises
 Woolpert
 Zipline Logistics



columbusregion.com

ONE¹
COLUMBUS[★]
Partners for Regional Growth & Prosperity