



ADVANCE WESTERVILLE

Retain. Develop. Support. Market.

An Economic Development Strategy – Exploration & Discovery Summary

09.2023

 Boyette

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INTRODUCTION

INTRODUCTION

The City of Westerville Economic Development Department (Westerville) engaged Boyette Strategic Advisors (Boyette) to develop a comprehensive Economic Development Strategy for the city. The development of **Advance Westerville** looked at both recent history and its impact on economic development, as well as future projections, outlining unique and dynamic opportunities for Westerville. This document provides an overview of the Exploration and Discovery process of the **Advance Westerville** plan. The comprehensive research summarized in this document informs the identification of target business sectors and the development of strategic goals to guide Westerville's economic development efforts for the next five years.

The Exploration component included thorough data mining related to past performance of the Westerville economy, how that performance may impact future outcomes, and how regional and national trends may offer direction for the city moving forward. Exploration also focused on stakeholder engagement to get an anecdotal view of Westerville's competitive position and the desires and ideas residents, employers, partners, educators, and city leaders have for the next five years.

Community involvement, paired with quantitative and qualitative research and creative thinking, has resulted in a plan that provides direction to focus the City's economic development efforts on opportunities that will take Westerville to new heights.

PROCESS OVERVIEW

A customized approach to the **Advance Westerville** Economic Development Strategy has led to the development of four strategic goals and five targeted sectors, all designed to enhance Westerville's continued competitiveness and success. This project began with a baseline economic indicator analysis, as well as an assessment of the city's overall livability. After the project launch, Boyette began research into five benchmark communities that were chosen based on their commonalities with Westerville and their economic development competitiveness. Two of the five were also chosen because they have a semiconductor manufacturing facility nearby. Additional research was conducted in the areas of workforce skills; emerging technologies; sector trends and location criteria; support of existing and new businesses; available sites and buildings; housing availability and affordability; and K-12 and post-secondary education.

The process has informed the strategies and action items that are designed to meet the four identified strategic goals, which follow:

- Retain
- Develop
- Support
- Market

Process Overview



Project Launch &
Market Analysis



Stakeholder Engagement



Exploration &
Discovery



Strategy &
Implementation

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KEY FINDINGS

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KEY FINDINGS

The **Advance Westerville** Exploration and Discovery process began prior to the first official meeting. The initial high-level look then became much more focused and detailed as the process moved forward. The in-depth comparison of data points became focused on a look at five benchmark communities. These communities were chosen based on their individual success stories, as well as some similarities between Westerville and each of the benchmarks.

Stakeholder engagement was utilized to validate the data analytics with anecdotal insight. Input was sought from a wide range of stakeholders. This input was collected through interviews and online surveys.

Following is an overview of the Discoveries made and how they will serve to shape Westerville's approach to economic development over the next five years.

BASELINE ECONOMIC INDICATORS

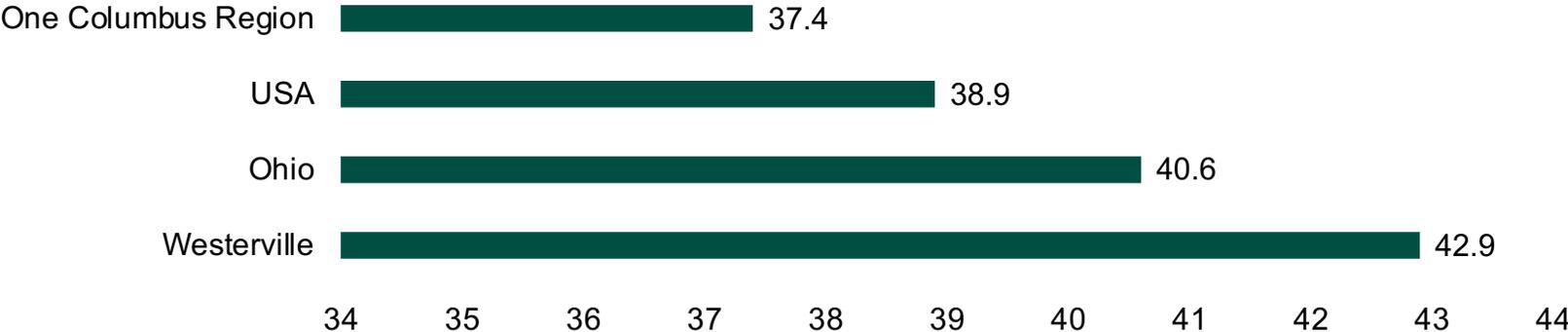
The Baseline Economic Indicator Analysis was part of the data collection process and compares Westerville to the One Columbus Region, Ohio, and the USA on a set of demographic data points related to economic development.

Site	2022 Total Population	2027 Total Population Projections
Westerville	40,084	40,623
One Columbus Region	2,297,797	2,353,082
Ohio	11,820,906	11,829,083
USA	335,707,897	339,902,796

Source: Esri, 2023

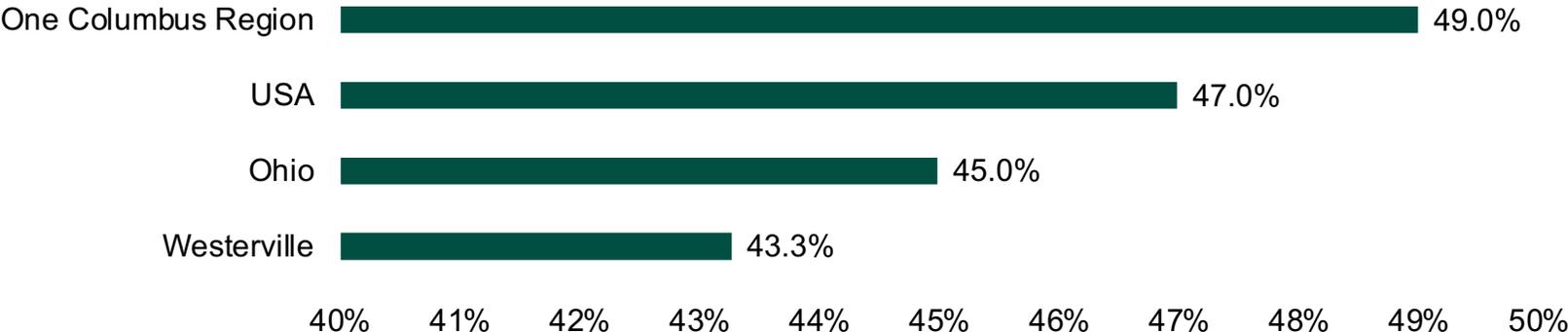
BASELINE ECONOMIC INDICATORS

2022 Median Age



Source: Esri, 2023

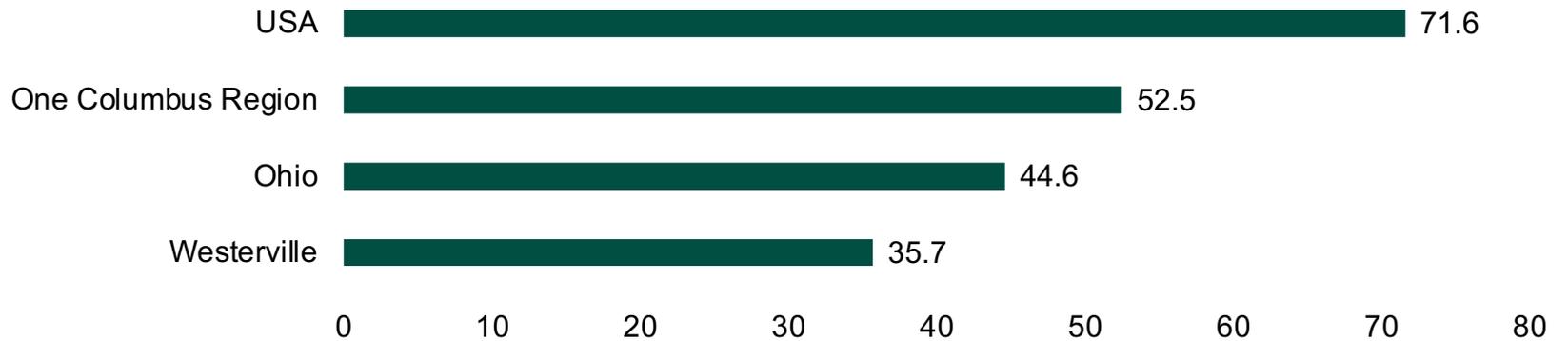
2022 Millennial/Generation Z Population



Source: Esri, 2023

BASELINE ECONOMIC INDICATORS

2022 Diversity Index



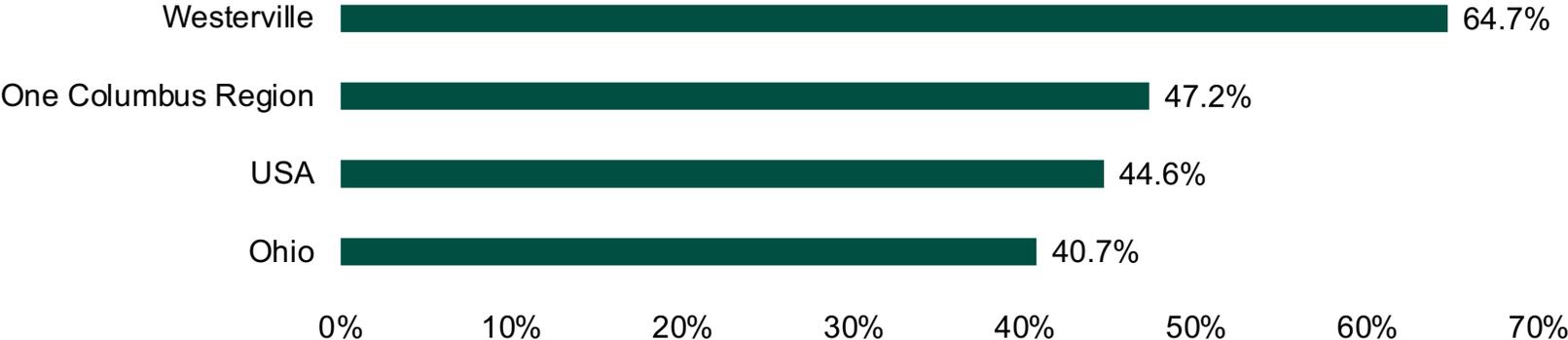
Source: Esri, 2023

18+ Population by Race (%)							
Site	White	Black/African American	American Indian/Alaska Native	Asian	Pacific Islander	Other Race	2 or More Races
Westerville	66.44%	5.53%	0.15%	2.35%	0.01%	0.83%	3.37%
One Columbus Region	56.73%	10.68%	0.22%	3.57%	0.03%	1.74%	3.77%
Ohio	61.85%	9.20%	0.20%	1.95%	0.03%	1.30%	3.51%
USA	49.95%	9.34%	0.82%	4.79%	0.15%	6.01%	6.89%

Source: Esri, 2023

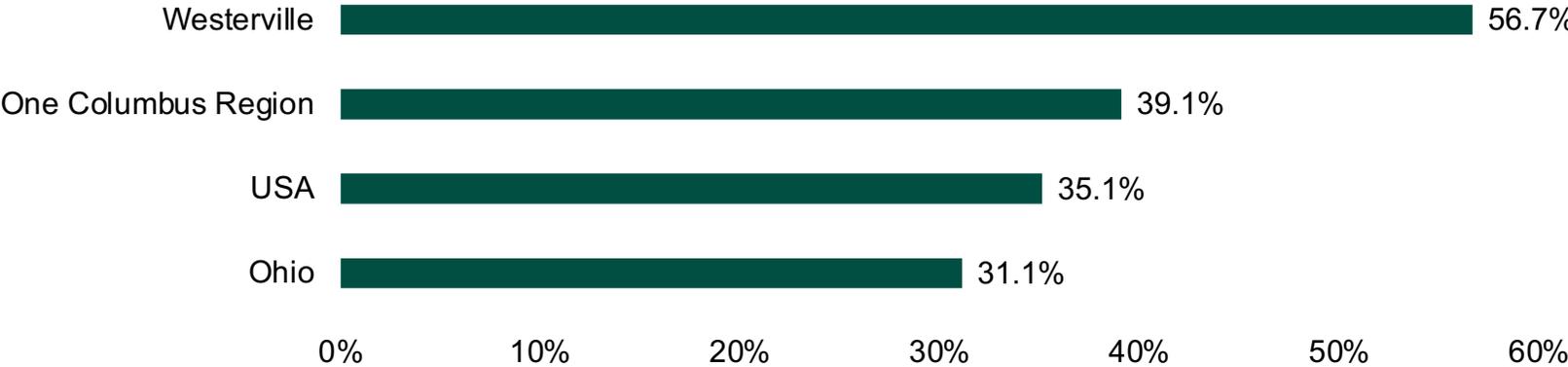
BASELINE ECONOMIC INDICATORS

2022 Population Age 25+: Associate's Degree or Higher (%)



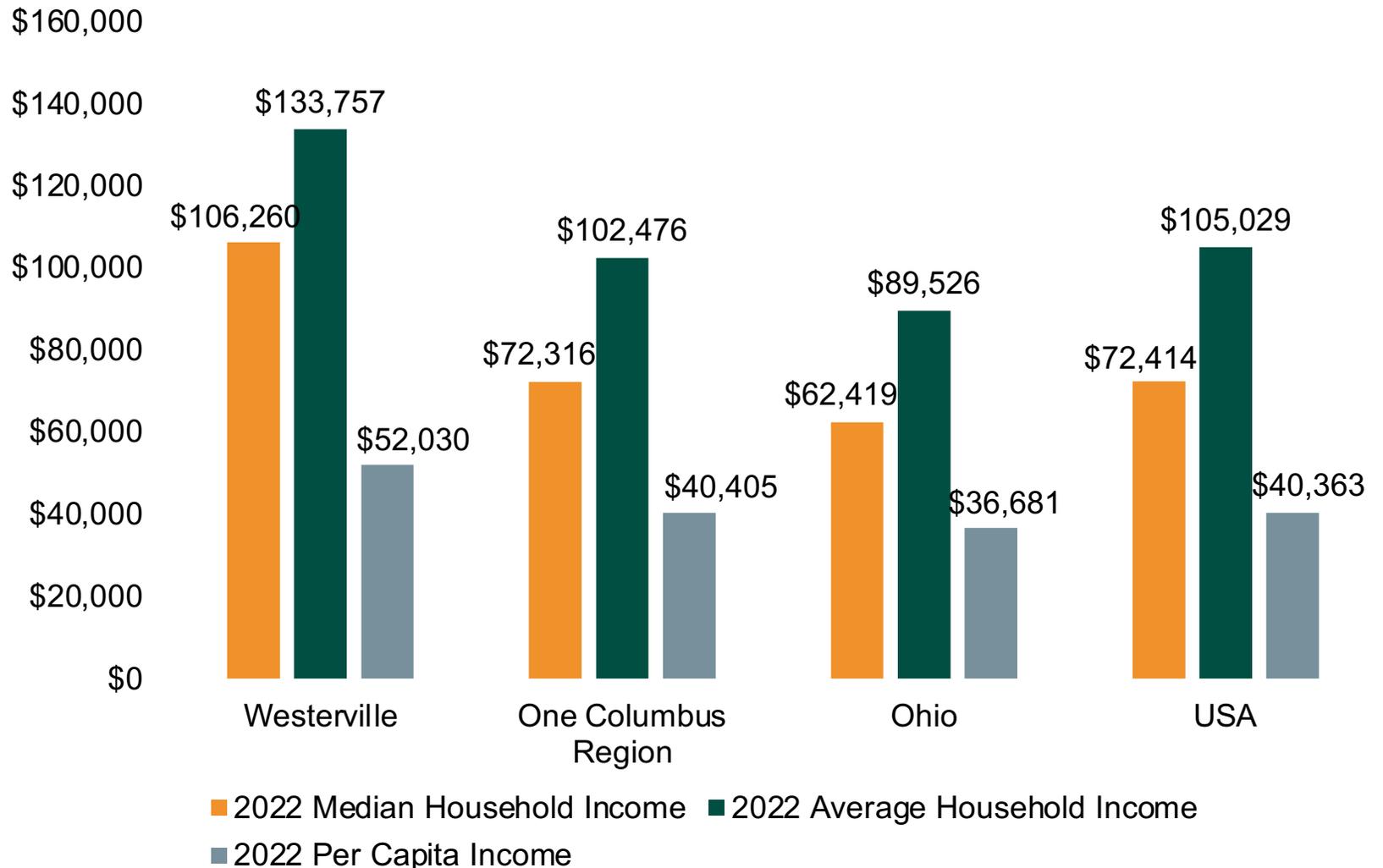
Source: Esri, 2023

2022 Population Age 25+: Bachelor's Degree or Higher (%)



Source: Esri, 2023

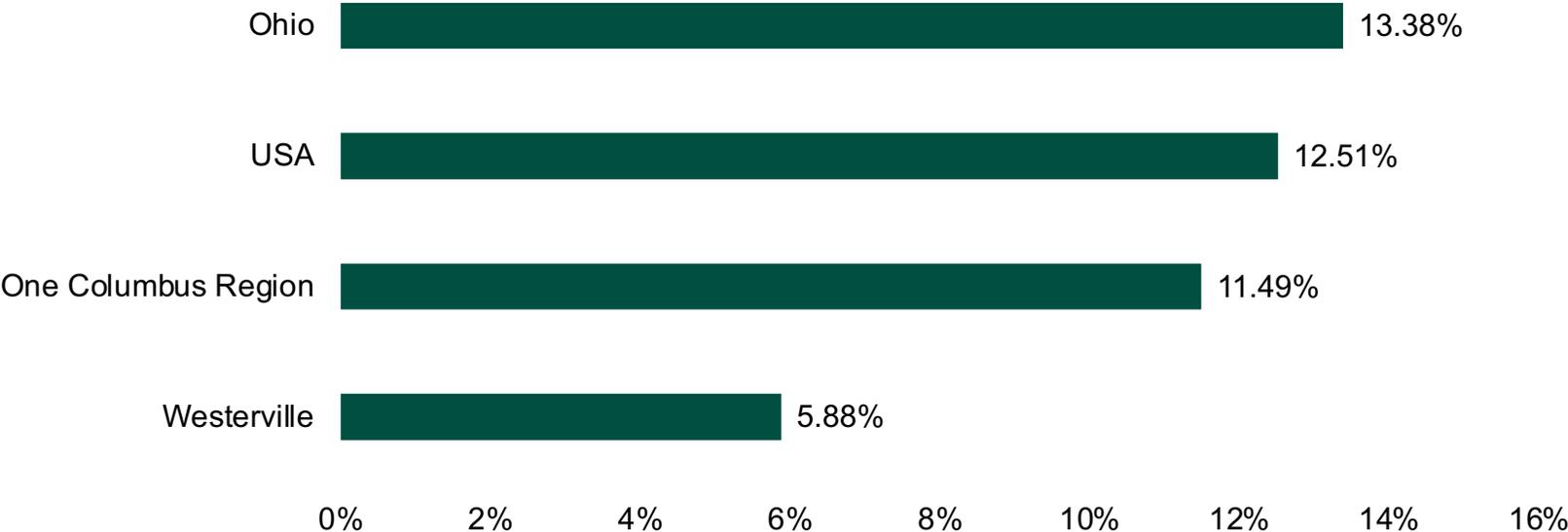
BASELINE ECONOMIC INDICATORS



Source: Esri, 2023

BASELINE ECONOMIC INDICATORS

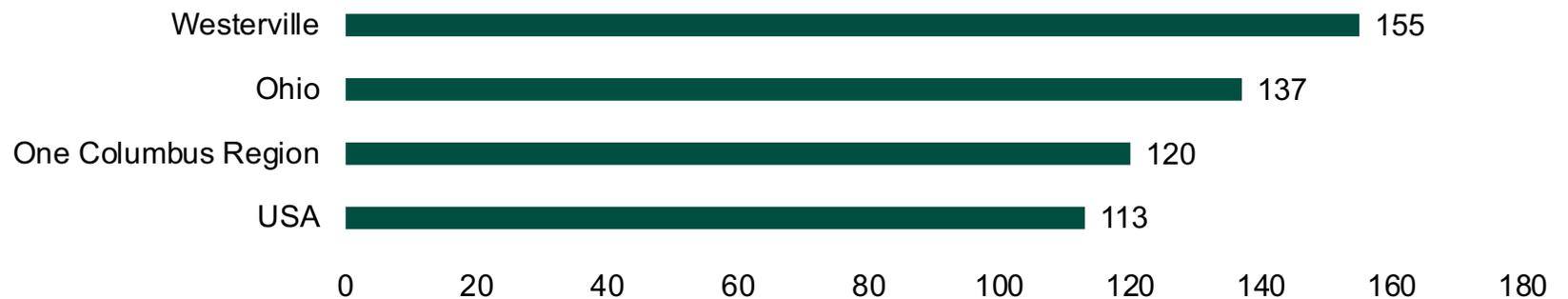
Households Below the Poverty Level (%)



Source: Esri, 2023

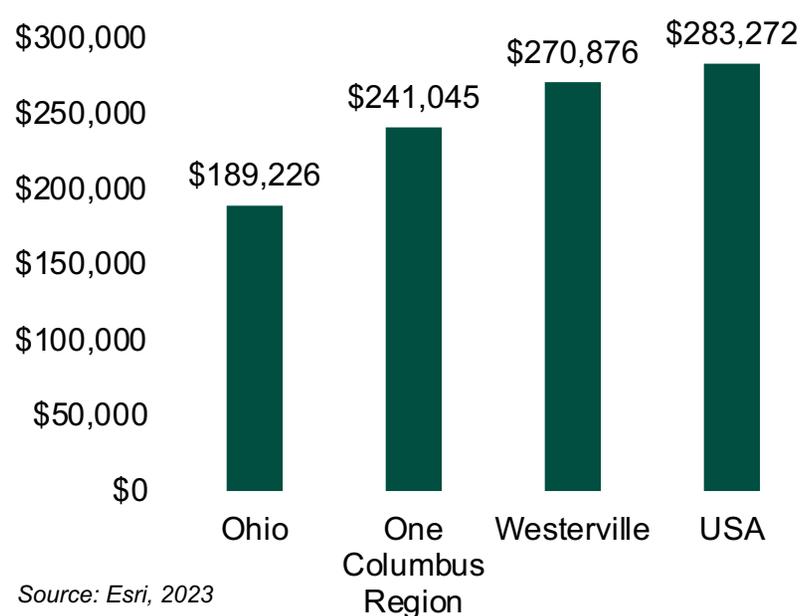
BASELINE ECONOMIC INDICATORS

2022 Housing Affordability Index



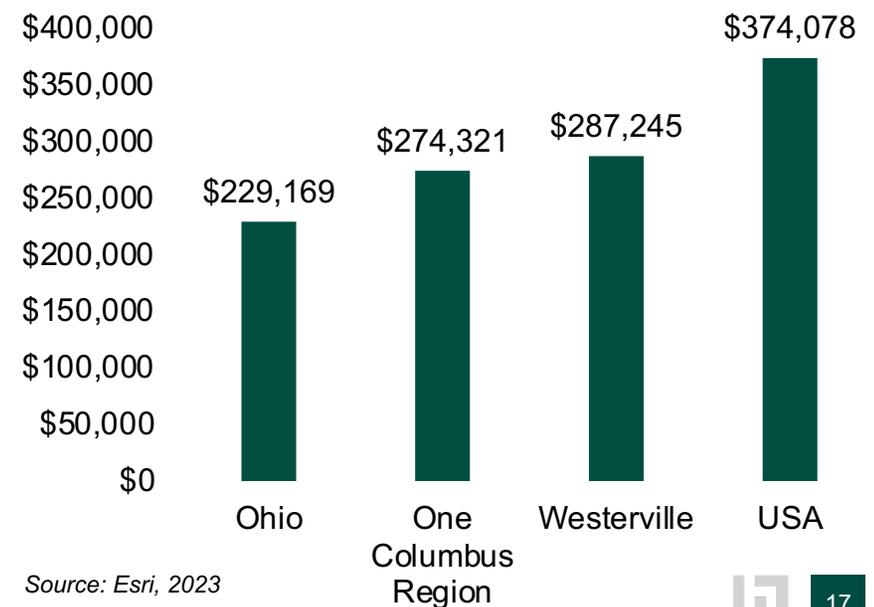
Source: Esri, 2023

2022 Median Home Value



Source: Esri, 2023

2022 Average Home Value

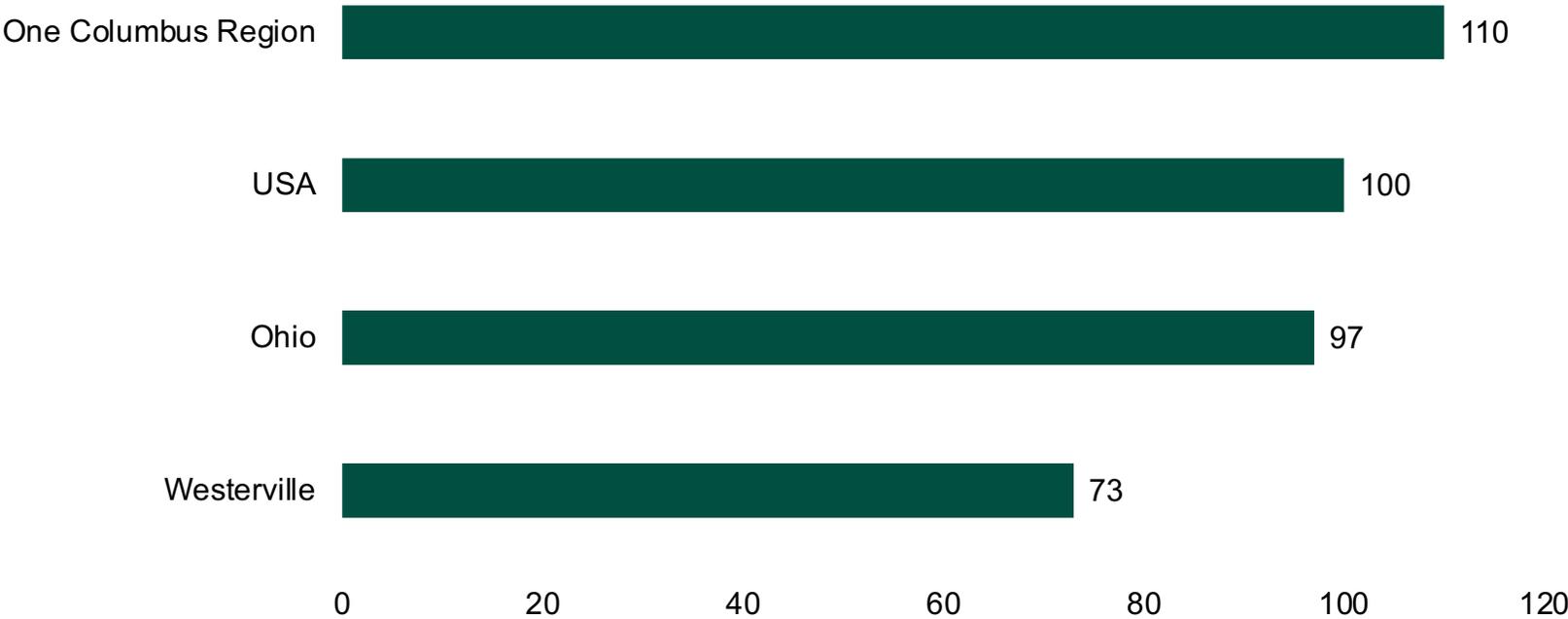


Source: Esri, 2023



BASELINE ECONOMIC INDICATORS

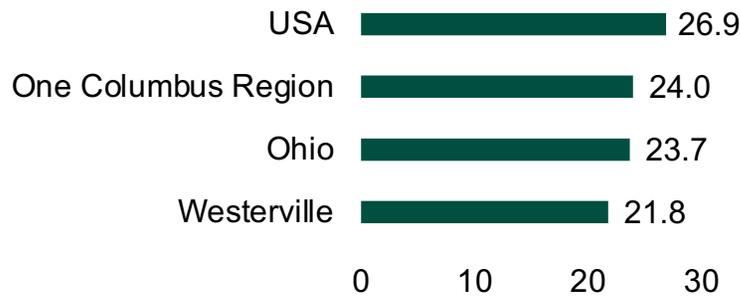
2022 Total Crime Index



Source: Esri, 2023

BASELINE ECONOMIC INDICATORS

2020 Average Commute to Work for Workers 16+ (Minutes)



Source: Esri, 2023



Source: CensusOnTheMap



Job Inflow/Outflow		
	Employees	Share
Employed in Westerville	19,204	100%
Employed in Westerville, But Living in Westerville	18,312	95.4%
Employed & Living in Westerville	892	4.6%
Living in Westerville	12,032	100.0%
Living in Westerville but Employed Outside	11,140	92.6%
Living & Employed in the Selection Area	892	7.4%

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BENCHMARK RESEARCH

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BENCHMARK RESEARCH

Benchmark research is a key element in developing an economic development strategy for any community. It allows for exploration of communities that have some similarities to Westerville and have experienced economic success in recent years. The box to the right provides a list of the communities that were used as benchmarks for the Westerville economic development strategy. This research process includes the following types of information:

- Population Demographics
- Educational Attainment
- Income
- Commuting
- Housing
- Livability Index
- Target Sectors
- Major Employers
- Recent Economic Development Wins
- Incentives
- Workforce



An overview of benchmark research Discoveries is found on the following pages.

BENCHMARK RESEARCH

Findings

- Westerville's total population is the second smallest of the benchmark locations at 40,084. Morrisville is smaller at 32,099. Millennial and Gen Z individuals make up 43.3 percent of Westerville's population, which is lower than all benchmark locations except for Georgetown.
- The median age in Westerville is 42.9, which is below the median for Georgetown at 44.7. Gilbert has the lowest median age at 34.3.
- In terms of educational attainment, Westerville falls in the middle of the benchmark locations. 64.7 percent of the city's population age 25+ have an Associate's degree or higher, and 56.7 percent have a Bachelor's degree or higher. Morrisville has the highest educational attainment across both measures, with 76.7 percent with an Associate's degree or higher and 71.0 percent with a Bachelor's degree or higher. All benchmark locations score higher than the national average.
- Westerville also falls in the middle on income measures, with a Median Household Income of \$106,260, an Average Household Income of \$133,757, and a Per Capita Income of \$52,030. Fishers has the highest Median and Average Household Incomes at \$122,300 and \$157,701 respectively; and Franklin has the highest Per Capita Income at \$58,345. All benchmark locations score higher than the national average.
- Westerville's working population has an average commute of 21.8 minutes, which is on par with Morrisville. Among the benchmark locations, Georgetown has the highest average commute at 27.4 minutes.

BENCHMARK RESEARCH

Findings

- All benchmark locations rank higher than Westerville in terms of home values. The city's Median and Average Home Values are \$270,876 and \$287,245 respectively, both of which fall just below the national averages. Franklin exhibits the highest home values, with a Median of \$486,821 and an Average of \$548,407.
- Westerville ranks second in Housing Affordability Index at 155, outpaced only by Fishers at 168. Franklin and Georgetown each rank lowest at 110.
- Westerville ranks third in Livability Index at 97.79, with Fishers and Morrisville exceeding the city at 110.93 and 102.8, respectively. Georgetown ranks lowest at 94.1.

FISHERS, INDIANA

A thriving suburb on the outskirts of Indianapolis, which is often noted as a competitor to the Columbus Region.

Fishers, IN	
Economic Development Organization	<ul style="list-style-type: none"> ▪ Fishers Economic Development ▪ Hamilton County Economic Development Corporation
Location	<ul style="list-style-type: none"> ▪ Northeast suburb of Indianapolis, IN ▪ 20 miles from Downtown ▪ 33 miles from Indianapolis International Airport
Downtown Development	<p>Fishers District</p> <ul style="list-style-type: none"> ▪ Fishers' new dining and shopping destination, which is an 18-acre, mixed-use space that includes Fishers Test Kitchen, designed to showcase up-and-coming chefs and give them a space to test their restaurant concepts ▪ Development includes The Yard, a large green space in the center of Fishers District, and new Hyatt Place and Hyatt House hotels ▪ Fishers District is located next to an existing TopGolf and Ikea, similar to Westerville Place
Entrepreneurship / Small Business Support	<p>Launch Fishers</p> <ul style="list-style-type: none"> ▪ 52,000-square-foot coworking space established in 2012 for entrepreneurs, created in partnership with the City of Fishers ▪ Over 600 members making it the largest coworking space in the Midwest ▪ Ball State University Center for Academic and Economic Innovation has committed to integrating Launch Fishers into its Entrepreneurship Program, with both experiential learning for students and with a physical presence at the facility <p>Indiana IoT Lab Fishers</p> <ul style="list-style-type: none"> ▪ Indiana's first IoT Lab launched in 2018 as a public-private partnership between Launch Fishers and City of Fishers, with sponsors Comcast Business, Indiana University, and the Indiana Economic Development Corporation ▪ 24,000-square-foot IoT Lab provides flexible space and resources for tech companies

FISHERS, INDIANA

Fishers, IN	
Entrepreneurship / Small Business Support	<p>Hub & Spoke</p> <ul style="list-style-type: none"> 94,000-square-foot, master-planned mixed-use development in partnership with the City of Fishers Includes a design center with retail showrooms, a coworking space, a makerspace, and the Hub & Spoke Institute, which is a work-based learning and innovation center
Redevelopment / Infill	<p>The City of Fishers Redevelopment Commission</p> <ul style="list-style-type: none"> The governing body of the Department of Redevelopment and the Redevelopment District (the "District") of City of Fishers Supports construction of certain infrastructure improvements in the area, including utility, roadway, and drainage improvements; and if funds are remaining, the reimbursement to the developer of the purchase price of certain property within the redevelopment area
Target Sectors	<ul style="list-style-type: none"> Real Estate Finance & Financial Services Healthcare, Pharmaceuticals, and Medical Devices Advertising & Marketing Retail & Shops Technology & IoT
Workforce Development	<p>Talent Attraction and Retention Programs</p> <ul style="list-style-type: none"> Hamilton County Economic Development Corporation (HCEDC) and county-supported efforts with TMap to create a database of Hamilton County high school alumni Marketing outreach then started to find alumni interested in returning to County Initiative identified more than 5,000 people who expressed interest in relocating, and now effort has turned to finding employers to connect with talent Current students will be connected to Hamilton County alumni and companies with related career paths

FISHERS, INDIANA

Fishers, IN

Recent Project Wins

First Internet Bank & CRG

- Mixed-use residential, retail, restaurants, and office
- \$157 million investment
- Completed in 2021

Pullman Pointe

- Mixed-use retail and residential
- \$29 million investment
- Completed in 2021

Flexware

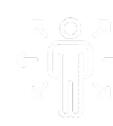
- New announcement
- Headquarters
- Commercial office
- \$3.5 million investment
- Completed in 2020

Hub & Spoke

- Coworking makers space and office
- \$14 million investment
- Completed in 2020

Fishers Ellipse

- New announcement
- Commercial office
- \$10 million investment
- Completed in 2019



FRANKLIN, TENNESSEE

High-profile suburb outside of Nashville, another competitive market with the Columbus Region.

Franklin, TN	
Economic Development Organization	<p>Williamson Inc.</p> <ul style="list-style-type: none"> Chamber and economic development organization are housed together, which is typical in Tennessee
Location	<ul style="list-style-type: none"> 21 miles from Downtown Nashville 25 miles from Nashville International Airport
Downtown Development	<ul style="list-style-type: none"> Development of a new City Hall in the heart of downtown Franklin, with accompanying public meeting spaces Several capital projects focused on the expansion of pedestrian access and connectivity between Downtown and the rest of the city
Entrepreneurship / Small Business Support	<p>Franklin Innovation Center</p> <ul style="list-style-type: none"> Franklin Innovation Center is a coworking space housed in a newly-renovated 4,100-square-foot historic mansion in Downtown Franklin Partnership with the Heritage Foundation of Williamson County Features 6 individual office suites that will lease for 1-year terms to selected companies <p>One Stop Development Center</p> <ul style="list-style-type: none"> Housed by the City of Franklin Purpose is to bring all the steps required to start a small business or open a business in Franklin into one place for convenience
Redevelopment / Infill	<p>Envision Franklin</p> <ul style="list-style-type: none"> Community plan that addresses redevelopment Redevelopment will prioritize sustainable building concepts, multi-modal transportation access, and seek to preserve the character of the city <p>Invest Franklin</p> <ul style="list-style-type: none"> Invest Franklin projects are funded by a 2016 property tax increase of .10 cents per \$100 of assessed valuation, with \$0.07 being dedicated to the Invest Franklin initiative Funds are used to support redevelopment and infrastructure improvements

FRANKLIN, TENNESSEE

Franklin, TN	
Target Sectors	<ul style="list-style-type: none"> ▪ Corporate Operations ▪ Healthcare ▪ Technology ▪ Research & Development
Workforce Development	<p>Williamson County WIOA Adult and Dislocated Worker and Youth Programs</p> <ul style="list-style-type: none"> ▪ Created through the Workforce Innovation and Opportunity Act (WIOA) ▪ Supports workforce development and training efforts of Williamson County residents
Recent Project Wins	<p>In-N-Out Burger</p> <ul style="list-style-type: none"> ▪ Plans to establish first corporate presence east of Texas in Franklin ▪ Proposed investment of \$125.5 million ▪ 275 new jobs ▪ Construction of 100,000-square-foot office building will begin in 2024 <p>McWhorter and Landmark Recovery</p> <ul style="list-style-type: none"> ▪ Announced expansion of headquarters operations in Franklin ▪ \$7.5 million investment ▪ 1,300 new jobs <p>Gutterglove, Inc.</p> <ul style="list-style-type: none"> ▪ Manufacturer of professional-grade stainless steel gutter guard ▪ Relocated HQ operations from California to Franklin in 2022 ▪ \$720,000 investment and 20 new jobs



GEORGETOWN, TEXAS

High-profile suburb outside of Austin, TX, a capital city, in close proximity to a major university and located in a market with a large Intel manufacturing presence.

Georgetown, TX	
Economic Development Organizations	<ul style="list-style-type: none"> ▪ City of Georgetown Economic Development Department ▪ Economic Development Department hosts an annual symposium each fall with local and regional business owners, real estate professionals, and community leaders, as well as a nationally-recognized expert to present on a timely, economic development-related topic
Location	<ul style="list-style-type: none"> ▪ 30 miles north of Austin, TX ▪ 33 miles to the Austin-Bergstrom International Airport ▪ 30 miles north of the Intel campus in Austin, TX
Downtown Development	<p>Main Street Program</p> <ul style="list-style-type: none"> ▪ The Georgetown Main Street Program works to enhance downtown vibrancy and historic preservation by implementing guidelines set forth by the National Main Street Center <p>Georgetown Cultural District</p> <ul style="list-style-type: none"> ▪ 40-block area of Downtown, which contains the Williamson County Courthouse, as well as more than 100 restaurants, wineries, shops, and galleries ▪ Arts and cultural facilities anchor the Cultural district, including the Palace Theatre, the Georgetown Public Library, the Georgetown Arts Center, and the Williamson Museum <p>2023 Downtown Master Plan</p> <ul style="list-style-type: none"> ▪ Planning document in progress that will provide a framework for development and redevelopment in the Downtown Overlay District in Georgetown ▪ The plan has been described as a blueprint for preservation, redevelopment, and new projects to help ensure they maintain the character of what makes Downtown unique and vibrant

GEORGETOWN, TEXAS

Georgetown, TX

Entrepreneurship / Small Business Support

Helping Hand

- Georgetown's Business Retention and Expansion (BR&E) program, aimed at maintaining open lines of communication, building enduring relationships, and aiding existing job creators as they hire more employees, add locations, invest in facilities, and continue to give back to the community

Small Business Guide

- An online portal connecting small business owners with resources available in Georgetown, including workforce assistance, a small business owner checklist, market data, webinars, and COVID support resources

Redevelopment / Infill

North Georgetown Tax Increment Redevelopment Zone

- 224-acre plot of land to become a tax increment reinvestment zone, or TIRZ, and two economic agreements to fund public improvement projects
- Will feature 388 units of multifamily housing, 1.7 million square feet of industrial development, and 392,000 square feet of commercial space
- \$24 million investment
- The purpose of the TIRZ is to fund public infrastructure improvements that are needed to develop the site

McCoy Elementary School

- Redevelopment of an old elementary school into a mixed-use project for the purposes of spurring economic growth and revitalization in the area
- "The McCoy PUD is a big win from an economic development standpoint because it places commercial space in a prime location along Williams Drive," Assistant City Manager Nick Woolery said
- The project will have approximately 300 apartments, 60,000 square feet of commercial space, between 650-700 parking spaces, and a plaza-style green space

GEORGETOWN, TEXAS

Georgetown, TX

Target Sectors

- Advanced Manufacturing
 - Georgetown Manufacturing Association: Seeks to address issues specific to the advanced manufacturing industry
- Life Sciences
 - Georgetown Health Foundation: dedicated to supporting the healthcare system in Georgetown. Works with local organizations and nonprofits to ensure critical needs of the healthcare system are met, such as access to affordable healthcare, education, transportation, and others
- Professional Services
- Destination Retail
 - The City of Georgetown and the Georgetown Economic Development Corporation (GEDCO) partnered with Catalyst Commercial to conduct a five-part retail study that would be the basis for a Retail Merchandising Plan

2017 Target Sector Analysis

- Done in conjunction with the workforce analysis study to refine the city's target sectors

Georgetown Workforce Development Alliance

- Partnership between the City of Georgetown, Georgetown Chamber of Commerce, and Georgetown Independent School District
- Works to align quality education with workforce development needs
- Organizes several events throughout the year, including an annual job fair, a veterans' job fair, a Career Exploration Day for middle school students, and Teacher Externships for local GISD teachers

2017 Workforce Analysis

- A workforce study aimed at diversifying the local economy, increasing business investment throughout the city, and leveraging talent
- Conducted a SWOT analysis to identify the the community's strengths, weaknesses, opportunities, and threats from a workforce standpoint

Workforce Development

GILBERT, AZ

Gilbert, AZ, is a high-profile suburb of Phoenix, a capital city with a major university presence. Additionally, Gilbert borders Chandler, AZ, which hosts Intel semiconductor manufacturing operations.

Gilbert, AZ	
Economic Development Organizations	<ul style="list-style-type: none"> ▪ City of Gilbert Office of Economic Development
Location	<ul style="list-style-type: none"> ▪ 22 miles southeast of Phoenix, Arizona ▪ 12 miles from the Phoenix Sky Harbor International Airport ▪ Maricopa County ▪ 10 miles from the Intel campus in Chandler, AZ
Downtown Development	<p>Heritage Park</p> <ul style="list-style-type: none"> ▪ \$300 million investment to create a mixed-use development in downtown Gilbert ▪ 10-acre site ▪ 154,000-square-foot, five-story office building, a 100-room hotel, a 288-unit apartment community, parking structures, and 36,000 square feet of restaurant and retail space spread across five or more buildings <p>Heritage District</p> <ul style="list-style-type: none"> ▪ Gilbert’s vibrant arts and entertainment district ▪ Featuring retail, antiques, art galleries, museum, public lighting, and art installations, as well as over 30 restaurants ▪ 30 percent of the population living in the Heritage District are between 25-44 <p>The Gilmore</p> <ul style="list-style-type: none"> ▪ A proposed mixed-use development ▪ 194,000 square feet of new commercial development, along with about 300 apartment units at a 40-acre vacant site near Mercy Gilbert Medical Center ▪ Will include a grocery store, apartments, and restaurants surrounding public open space on the site

GILBERT, AZ

Gilbert, AZ

Entrepreneurship / Small
Business Support

CO+HOOTS

- Entrepreneurial support organization that partnered with Gilbert to create the Gilbert Business Hub to connect businesses with resources such as:
 - COVID recovery webinars for small businesses
 - Connection to local government, consultants, and resources
 - One-on-One technical assistance and trainings through the Hub

Business assistance programs include:

- 60-day permitting
- Over-the-counter plan reviews
- Express permitting
- Operational cost analysis
- Incentive comparisons
- Workforce studies
- Project management
- Connectivity to key resources

Taking Care of Small Business (TCSB)

- Provides free assistance and support to emerging small businesses and helps them through the permitting process



GILBERT, AZ

Gilbert, AZ

Redevelopment / Infill

2018 Heritage District Redevelopment Plan

- Focused on redevelopment of the commercial corridors. along with the preservation of the elements that gave the district its unique character to begin with
- Current projects include the development of a multi-use path through the district, development of the South Anchor to attract vibrant commercial users to serve as the gateway to the district, and the development of the Water Tower Park to add green space to the Heritage District

Redevelopment Commission

- Advises the Town Council on matters related to the redevelopment area in downtown Gilbert
- Members consider new proposals for development, monitor current projects, and implement the Redevelopment Plan
- The Gilbert Economic Development Director said that redevelopment, infill, and mixed-use development were top priorities for Gilbert

Northwest Gilbert Revitalization

- Northwest Gilbert is considered the most “mature” area in the community
- To ensure that each part of Gilbert remains a vibrant place to live, work, and play, Gilbert is examining proactive area options for the northwest area. Area efforts play an important role in addressing signs of decline before they negatively impact residents and businesses
- The Northwest Growth Area in Gilbert is a proven employment and economic corridor. By focusing on the data and development trends in this area, thousands more residents will be better connected to trails, community amenities, restaurants, retail, schools, housing, and existing employers
- It is anticipated this area will support a projected 10,000 jobs in the area at build-out
- Gilbert is focusing on attracting STEM and STEM-related jobs to the northwest corridor
- For every \$1 invested in revitalization, Gilbert anticipates \$7 return in private investment

GILBERT, AZ

Gilbert, AZ

Target Sectors

- Biotechnology & Life Sciences
- Advanced Business Services
- Aerospace & Aviation
- Clean Technology & Renewable Technology
- Manufacturing
- Finance & Insurance

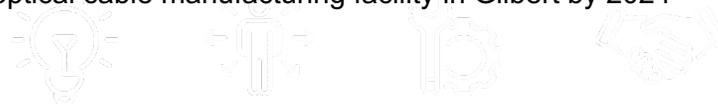
Workforce Development

- One million people within a 30-minute drive of Gilbert
- Within 30 minutes, there is access to 70 percent of the Phoenix MSA's high-tech workforce, 73 percent of the engineering workforce, and 67 percent of the advanced business services
- Park University
- University of Arizona
- Arizona State University's Polytechnic Campus (Mesa)
- Chandler Gilbert Community College (Chandler)
- Grand Canyon University (Phoenix)

Recent Project Wins

Corning

- Announced plans to open a new optical cable manufacturing facility in Gilbert by 2024
- Projected job creation of 250 jobs
- \$100 million investment



MORRISVILLE, NC

Community in the Raleigh-Durham Research Triangle. Close proximity to a capital city and several major universities. Morrisville has had success in redevelopment efforts and attracting the life sciences industry.

Morrisville, NC	
Economic Development Organizations	<p>Choose Morrisville</p> <ul style="list-style-type: none"> The Morrisville Chamber of Commerce handles economic development for the city
Location	<ul style="list-style-type: none"> 14 miles west of Raleigh, NC 4 miles from Raleigh-Durham International Airport
Downtown Development	<p>Morrisville Town Center</p> <ul style="list-style-type: none"> Early phases of the project to redevelop the town center of Morrisville into a vibrant mixed-use district Projected capital investment of \$57.4 million Construction began in 2022 Plan calls for 202,000-square-feet of residential space (102 studio, 1- and 2-bedroom units), 30,500 square feet of retail space, 36,000 square feet of office use, 15 townhomes, and a parking structure with 304 spaces
Entrepreneurship / Small Business Support	<p>Small Business Services</p> <ul style="list-style-type: none"> Peer groups: small roundtable groups that are managed by Chamber members with a similar focus. The purpose is to solve challenges together, support one another, and learn from each other <p>Free Consulting</p> <ul style="list-style-type: none"> Free consulting is offered at the Morrisville Chamber offices, provided by the Small Business Technology & Development Center at NCSU <p>Mentoring Services</p> <ul style="list-style-type: none"> The Chamber keeps a log of mentors available to new small businesses <p>Shop Local Campaign</p> <ul style="list-style-type: none"> Each November-December, the Morrisville Chamber partners with the American Express national shop local program to highlight the impact of spending locally for rent

MORRISVILLE, NC

Morrisville, NC	
Entrepreneurship / Small Business Support	<p>Launch Morrisville</p> <ul style="list-style-type: none"> 10-week entrepreneurial education program and mentorship experience presented by Wake Tech Free of charge to entrepreneurs Wake Tech has had 600 entrepreneurs complete Launch programs in municipalities throughout Wake County <p>C-Suite Conversations</p> <ul style="list-style-type: none"> Open to Morrisville-based small businesses Program hosted by Wake Tech RTP campus taps into the expertise of local industry C-level executives to discuss timely issues and topics with a local Morrisville focus <p>Coffee & Connections</p> <ul style="list-style-type: none"> Designed to help members hone their connection skills and build an effective network to grow their businesses <p>Discovery at Perimeter Park</p> <ul style="list-style-type: none"> Coworking space with lab and office for rent
Redevelopment / Infill	<p>Sam's Club Redevelopment</p> <ul style="list-style-type: none"> Early planning phase for the redevelopment of a Sam's Club to be used as a hub for high-tech life science companies
Target Sectors	<ul style="list-style-type: none"> Advanced Medical Technologies Biotechnology and Life Sciences Software/IT



MORRISVILLE, NC

Morrisville, NC

Workforce Development

Educational Resources

- The anchor universities of the Research Triangle are The University of North Carolina, North Carolina State University, and Duke University
- Additional post-secondary institutions in the region:
 - Campbell University
 - Meredith College
 - North Carolina Central University
 - Saint Augustine's University
 - Shaw University
 - William Peace University
- Wake Technical Community College is the state community college in Wake County. In 2022, the Wake Tech campus in Morrisville opened the Lilly Science and Technology Center, featuring 23 smart classrooms and state-of-the-art science labs

KNOW – Knowledgeable Network of Women

- Provides professional development and networking opportunities for women in business

Power of Inclusion

- Designed to develop safe, open, and inclusive environments for all to collaborate and co-exist

Recent Project Wins

Catalent

- Pharmaceutical manufacturing facility
- Investing \$40 million
- 201 new jobs

Encoded Therapeutics

- Gene therapy company
- Opened a new manufacturing site in Morrisville to develop nonclinical and clinical supplies of gene therapies in support of the company's research programs for pediatric disorders of the central nervous system



MORRISVILLE, NC

Morrisville, NC

Recent Project Wins

Enzyvant

- Commercial-stage biotechnology company with a focus on regenerative medicines for rare diseases
- Investing \$34 million in a 25,972-square-foot Good Manufacturing Practices (GMP)-compliant regenerative medicine manufacturing facility

NightHawk Biosciences

- Biopharmaceutical company focused on developing therapies to modulate the immune system
- Plans to build an advanced biosafety level 2 laboratory, adding biodefense and infectious disease capabilities
- This project is an expansion of an existing facility in Morrisville

Microsoft

- New Microsoft facility announced to open in 2023
- 500 new jobs
- \$125,000 average salary

Invitae

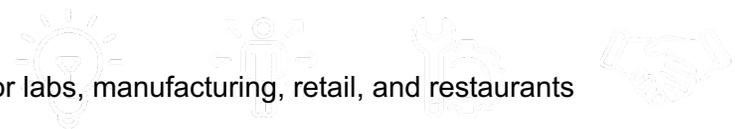
- Genomics company
- Plans to create 374 jobs and invest \$1.4 million

Spark LS

- 109-acre speculative campus
- 1.5 million square feet of space for labs, manufacturing, retail, and restaurants
- \$1 billion investment

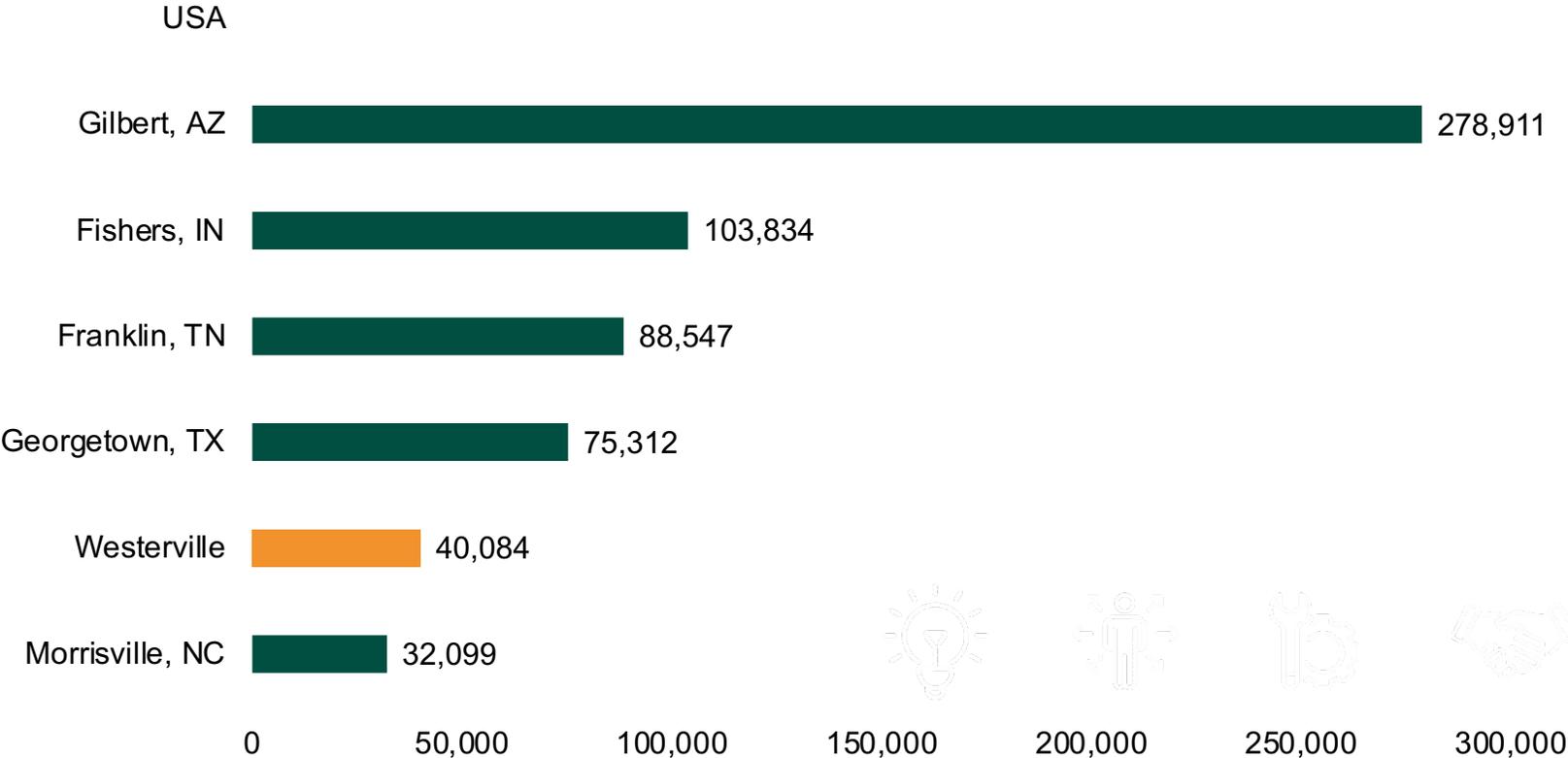
Fujifilm

- Biomanufacturing facility
- Expansion will bring \$90 million investment and create 100 new jobs



DEMOGRAPHICS

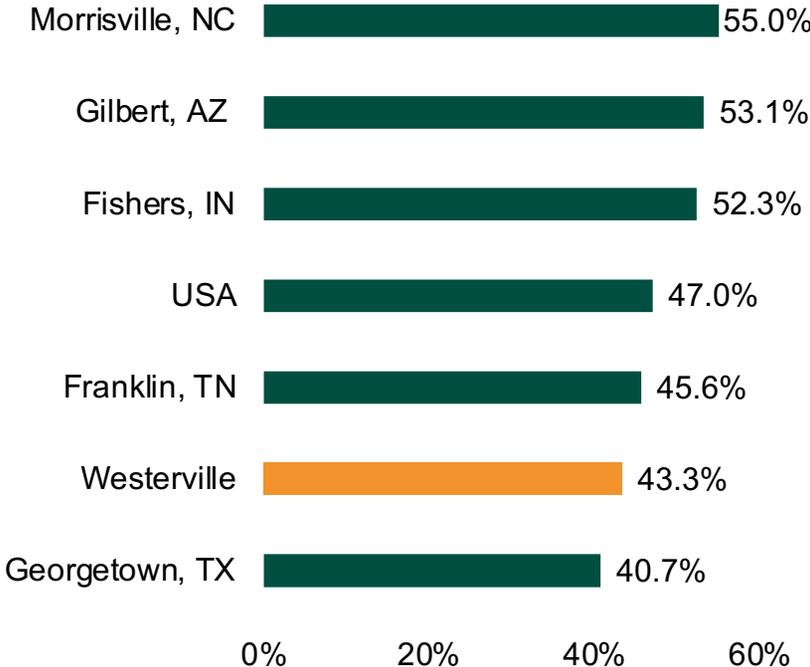
2022 Total Population



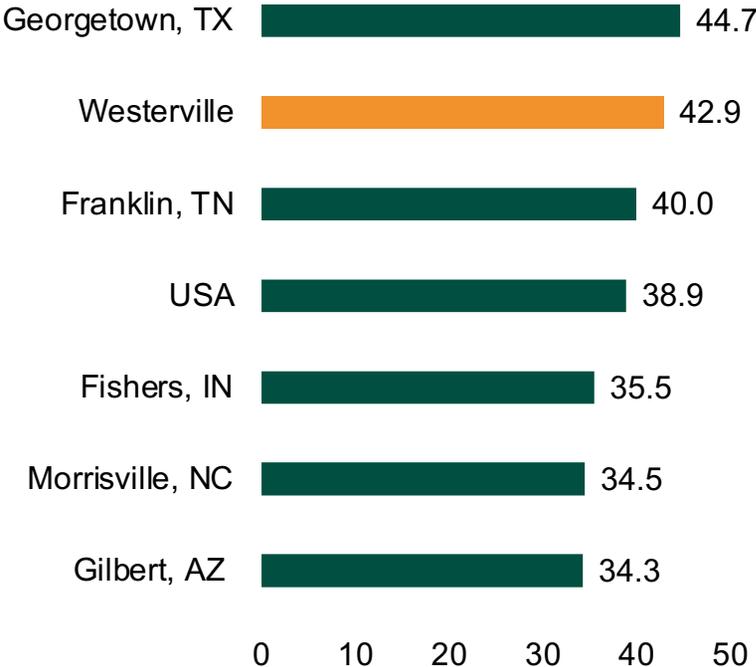
DEMOGRAPHICS

Westerville had a relatively lower Millennial/Gen Z population and an older median age when compared to most communities other than Georgetown, TX. Therefore, strategies in the plan could focus on ways to attract a younger workforce to Westerville to continue to support existing employers and businesses.

2022 Millennial/Gen Z Population

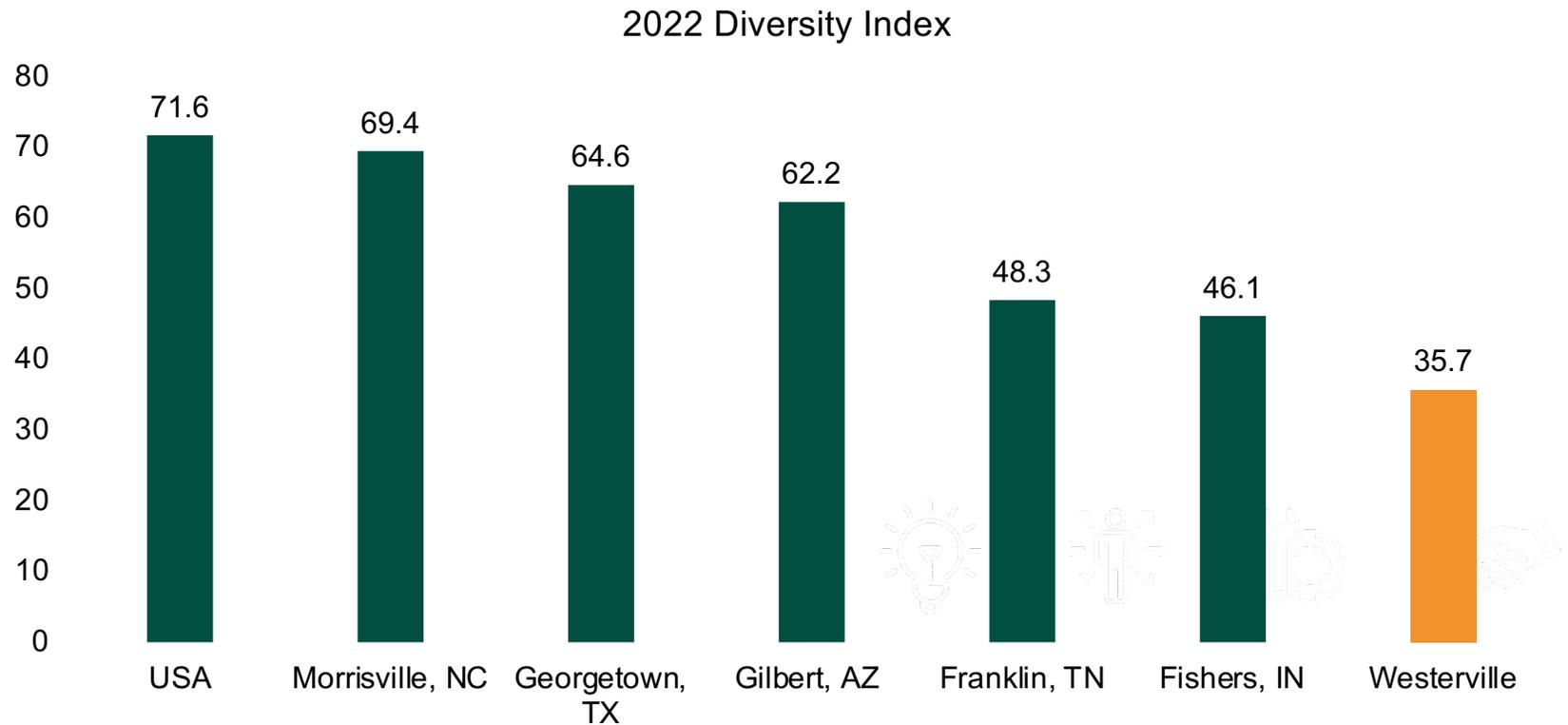


2022 Median Age



DEMOGRAPHICS

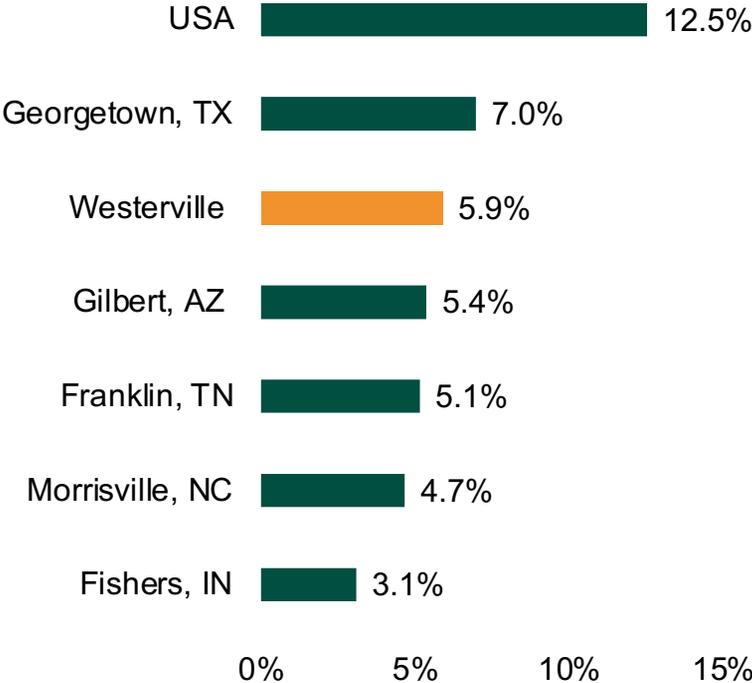
Westerville has the lowest Diversity Index score at 35.7. This index, prepared by Esri Business Analytics, represents the likelihood that two persons, chosen at random from the same area, belong to different races or ethnic groups. Among the benchmark locations, Morrisville has the highest Diversity Index at 69.4. All benchmark locations rank below the national Index of 71.6.



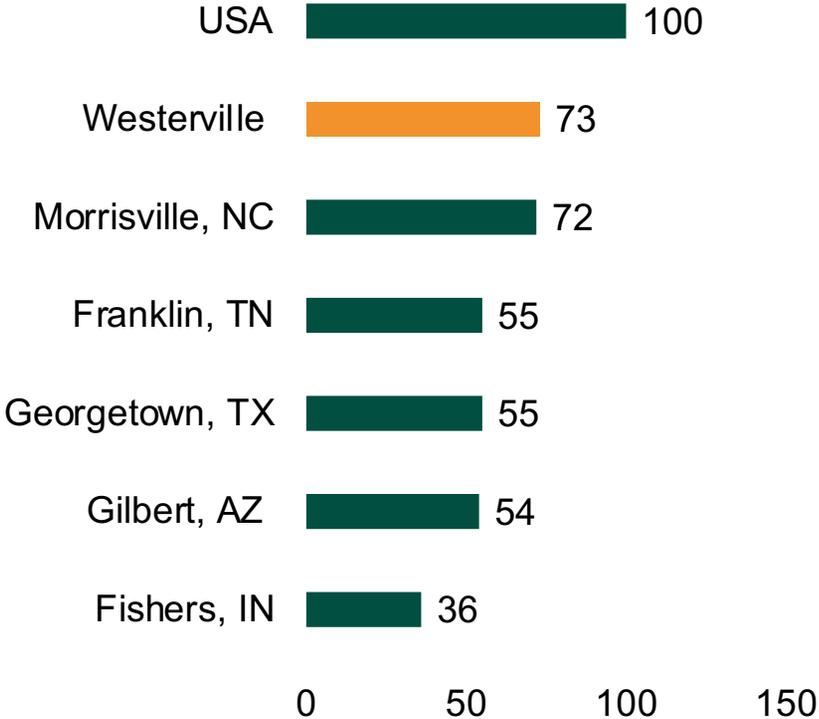
DEMOGRAPHICS

The Total Crime Index is an Esri tool that measures the likelihood that a crime would be committed in a certain geography, based on a U.S. score of 100. Anything higher indicates a greater likelihood of crime, and anything lower indicates a safer community. Westerville and all benchmarks scores much lower than the U.S. baseline.

2020 Households Below the Poverty Level (%)



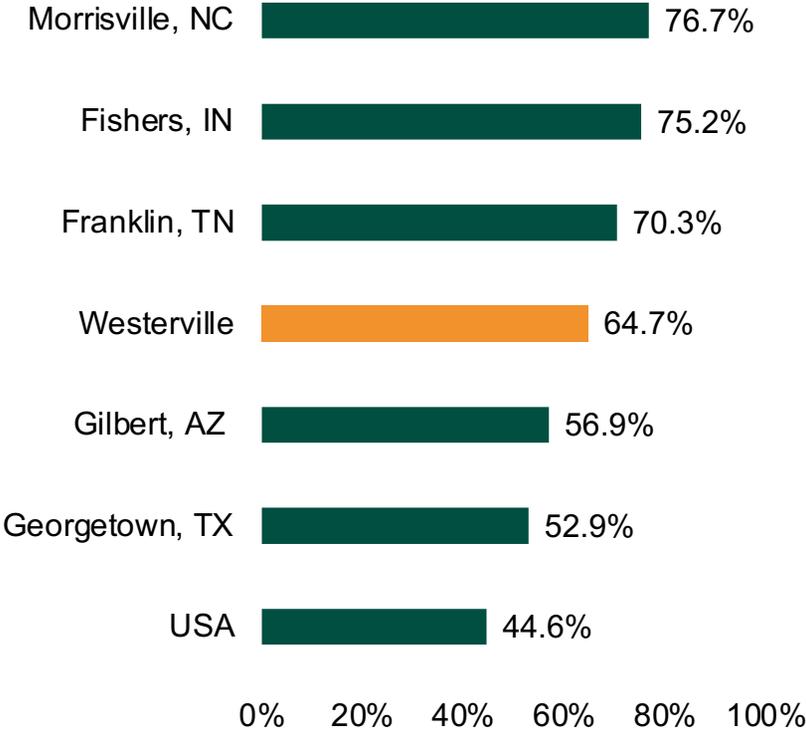
2022 Total Crime Index



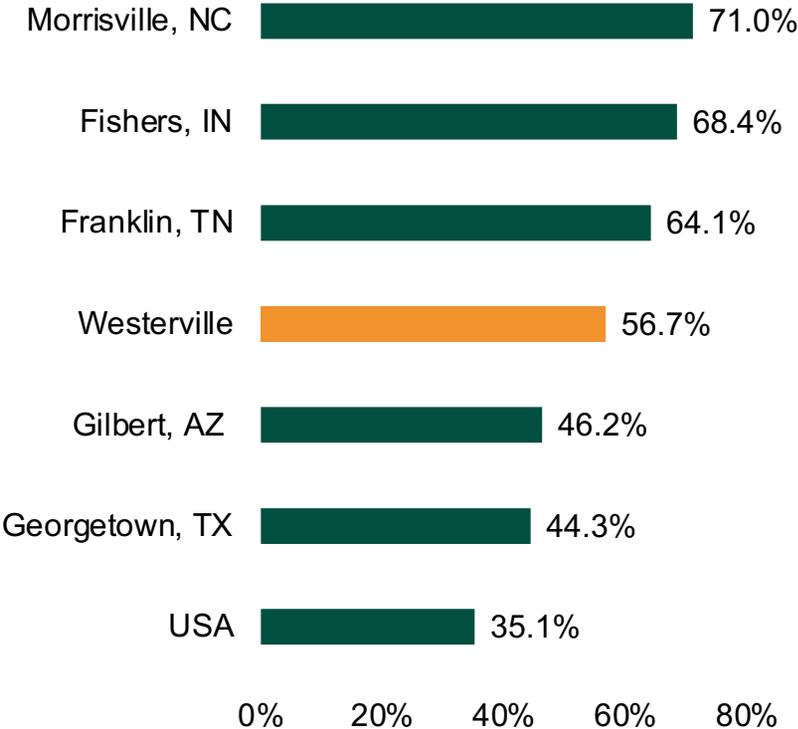
EDUCATIONAL ATTAINMENT

Westerville has a highly-educated workforce, which should continue to be used as an asset to leverage Westerville's competitiveness.

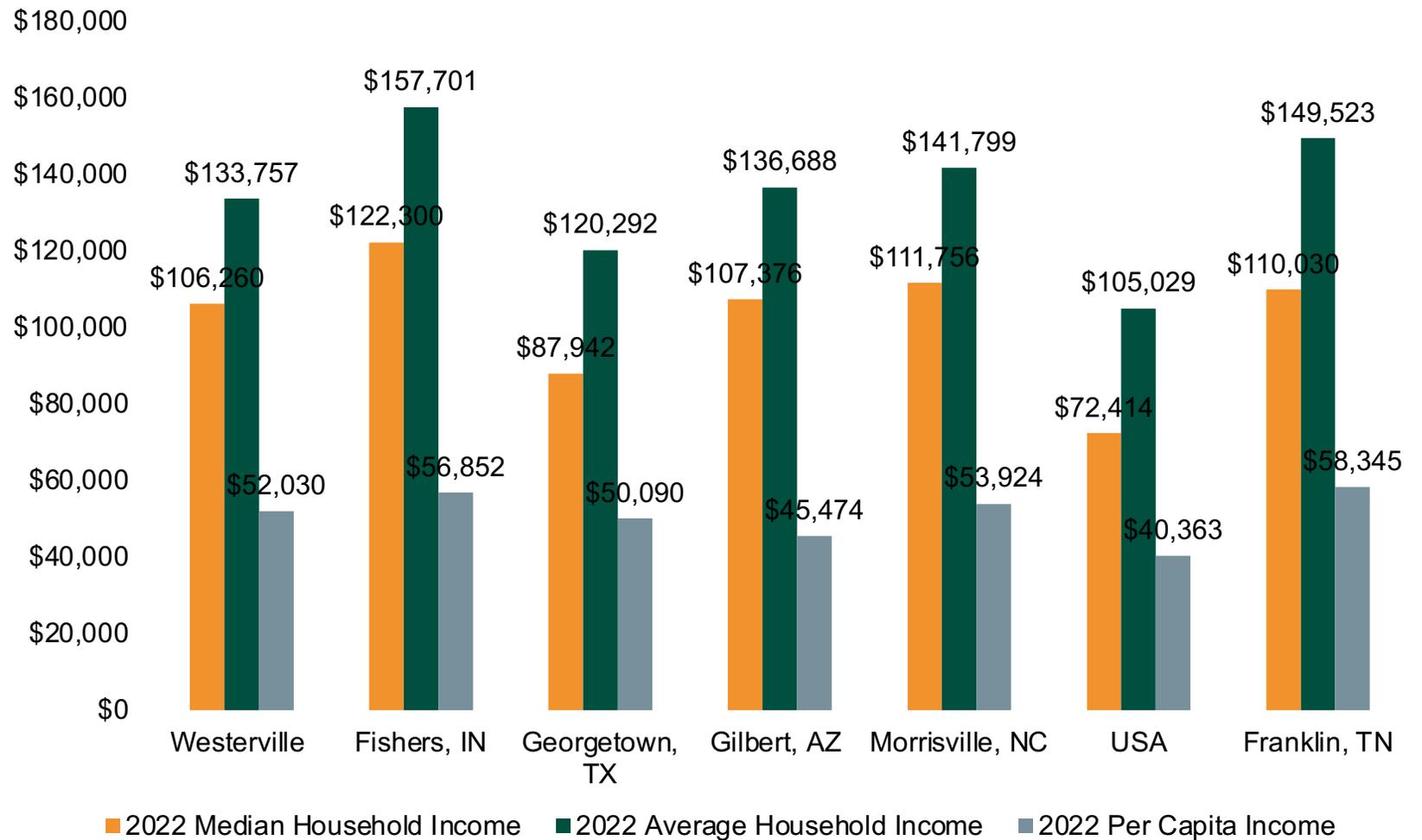
2022 Population Age 25+: Associate's Degree or Higher (%)



2022 Population Age 25+: Bachelor's Degree or Higher (%)



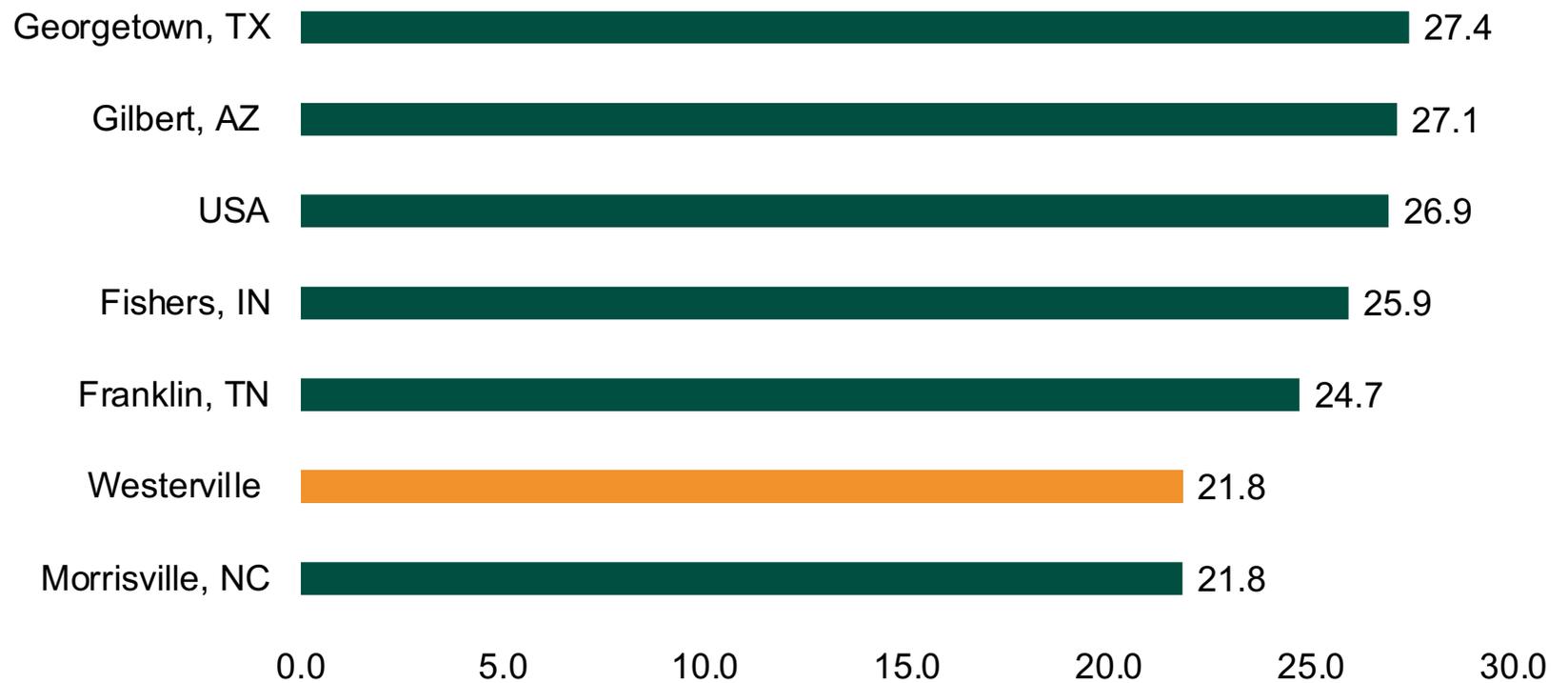
INCOME



COMMUTING

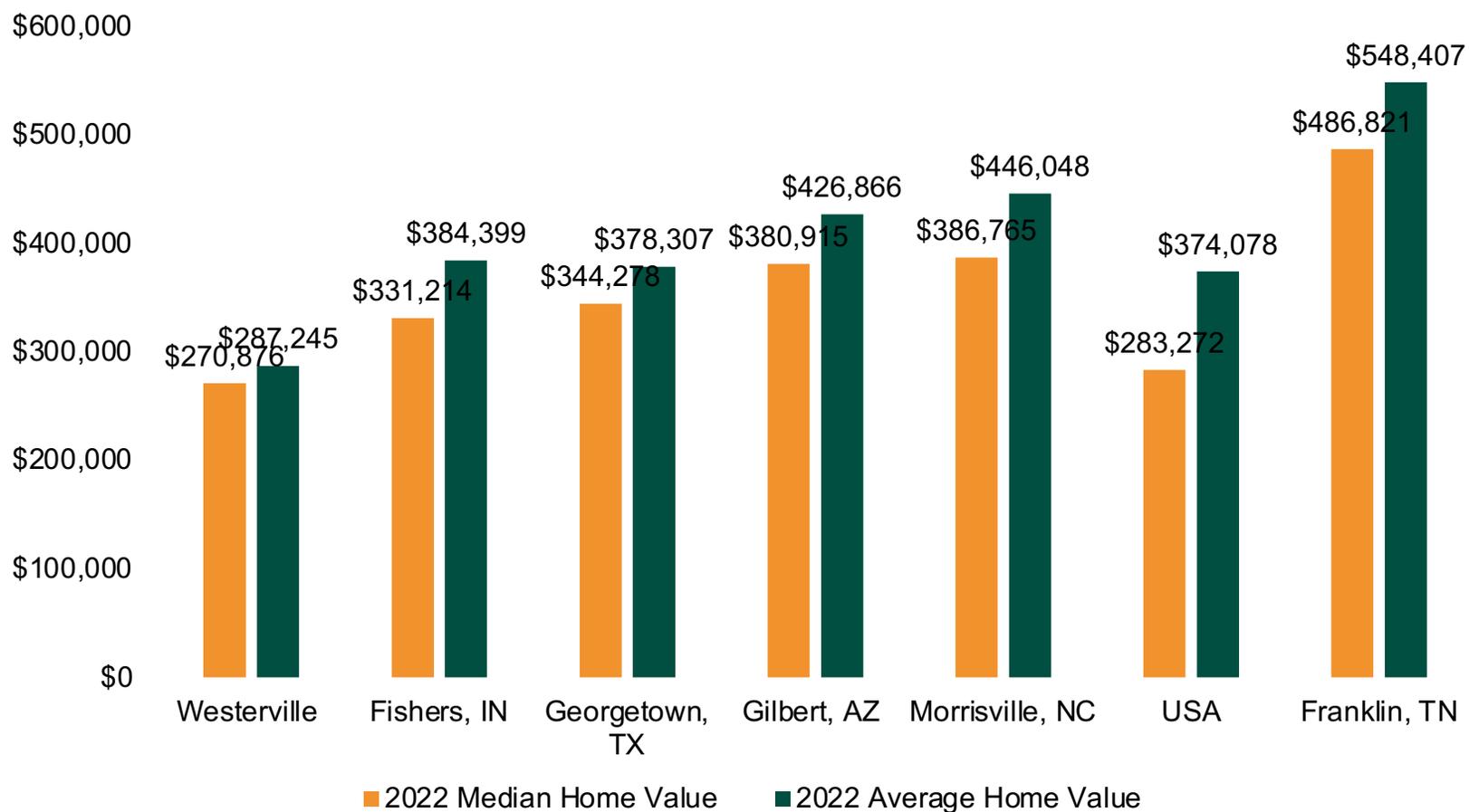
Westerville has a shorter average commute time than most of the benchmarks, which is an attractive asset for potential employers and workforce.

2020 Average Commute to Work for Workers 16+ (Minutes)



HOUSING

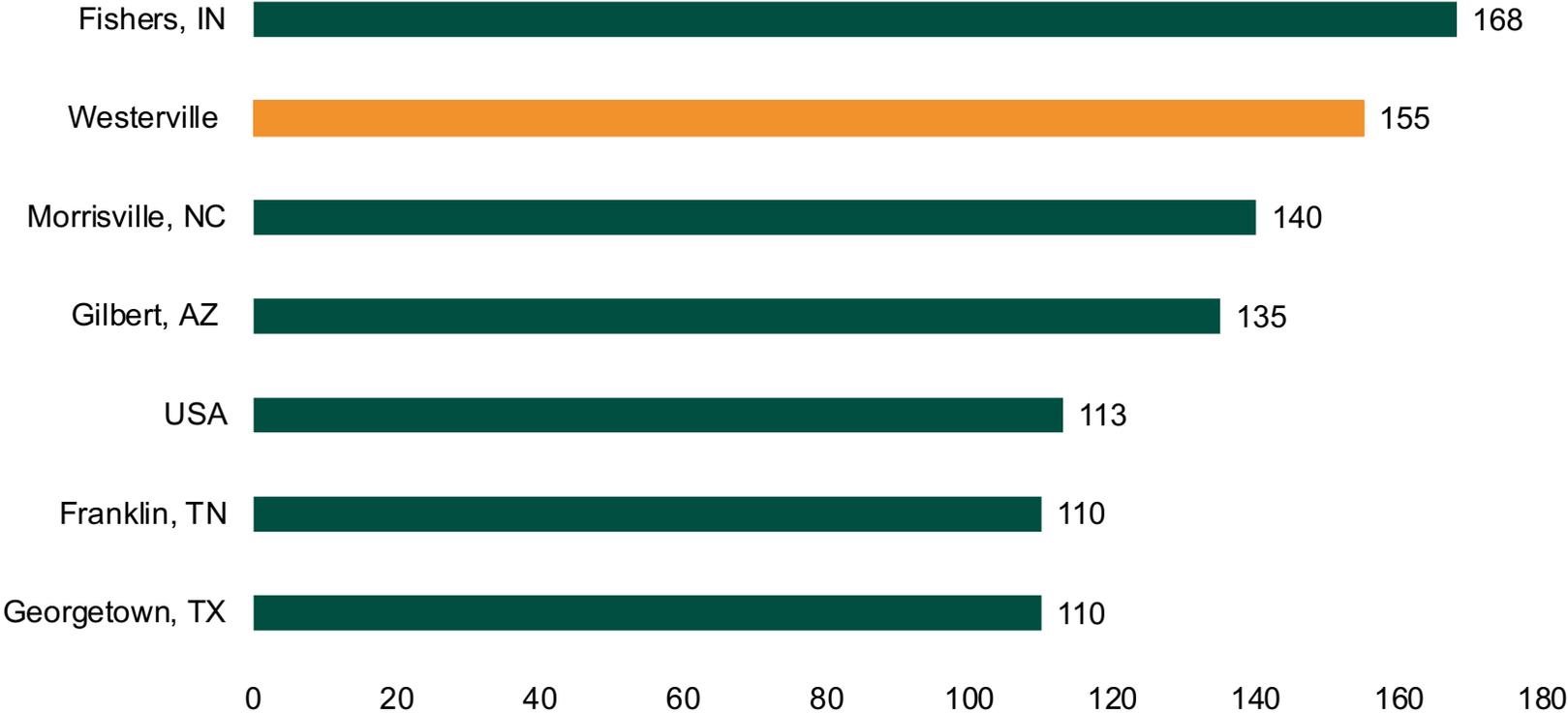
Home Values



HOUSING

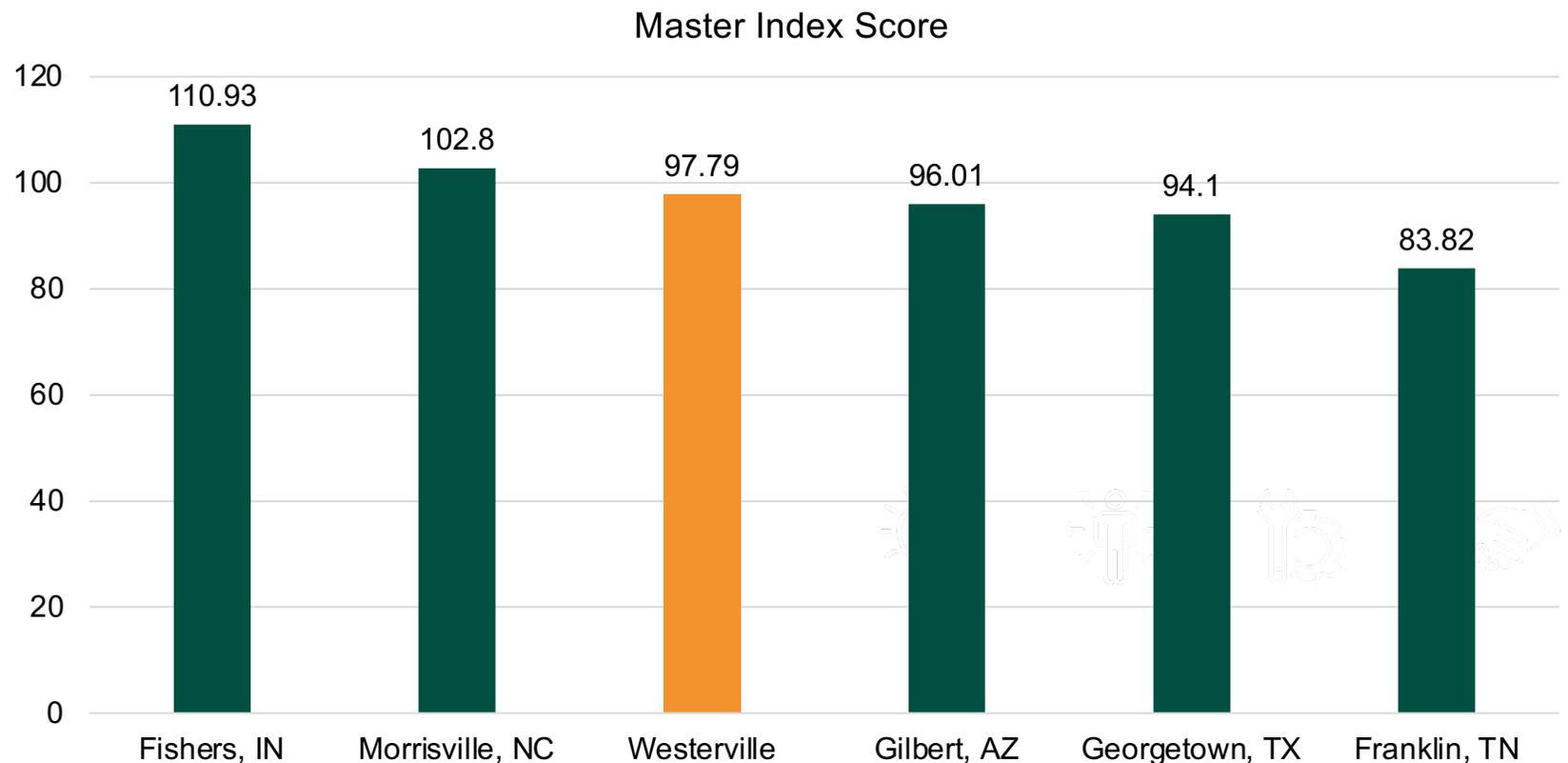
The Housing Affordability Index is a measure of how likely a resident of a geography is to be able to afford a median-value home at the median income. The higher the score, the more affordable housing is considered to be as a proportion of one's income. Westerville scored highly, indicating that the housing burden is less than in the other benchmark communities.

2022 Housing Affordability Index



LIVABILITY INDEX

The Boyette Livability Index is a proprietary tool used to calculate a "livability score" for communities. The index includes variables around transportation, diversity, education, incomes, housing affordability, health & wellness, environment, poverty, crime, and other livability measures. Each component is weighted against the U.S. average. The higher the score, the more "livable" a place is considered to be. Westerville was on par with the U.S. average and scored higher than most benchmark communities.



K-12 EDUCATION

	Enrollment	Attendance Rate	Graduation Rate	Spending per Pupil	Average Teacher Salary	Percent Economically Disadvantaged
Westerville						
Westerville City	14,133	92.3%	91.3%	\$11,415	\$78,523	31.4%
Olentangy Local	21,803	94.0%	98.0%	\$10,262	\$81,911	6.6%
New Albany-Plain Local	5,009	93.9%	98.8%	\$12,311	\$77,932	6.2%
Dublin City	15,800	93.5%	96.1%	\$12,846	\$86,707	13.6%
Hilliard City	15,874	93.1%	90.2%	\$11,361	\$84,099	19.0%
Bexley City	2,455	93.9%	95.7%	\$14,598	\$85,532	7.3%
Upper Arlington City	6,191	94.4%	96.5%	\$14,318	\$89,297	4.5%
Worthington City	10,341	93.0%	93.9%	\$12,453	\$83,342	23.9%
Ohio						
	1,672,196	90.4%	87.2%	\$11,500	\$63,082	60.0%

K-12 EDUCATION

	Enrollment	Attendance Rate	Graduation Rate	Spending per Pupil	Average Teacher Salary	Percent Economically Disadvantaged
Fishers, IN						
Hamilton Southeastern	21,603	54.4%	97.3%	\$8,954	N/A	N/A
Franklin, TN						
Williamson County Schools	41,251	N/A	96.2%	\$10,600.17	\$58,863	3.0%
Franklin Special SD	3,134	N/A	90.1% (2020)	\$17,643.36	\$66,596	11.0%
Georgetown, TX						
Georgetown ISD	12,566	94.1%	90.0%	\$11,493	\$55,170	34.9%
Gilbert, AZ						
Gilbert Unified District	32,625	95.5%	89.5%	\$7,158.63	N/A	N/A
Morrisville, NC						
Wake County Schools	157,849	N/A	89.6%	\$11,790.36	N/A	N/A
Durham Public Schools	30,806	N/A	84.0%	\$15,089.20	N/A	N/A

4

TARGET SECTOR ANALYSIS

TARGET SECTORS

Overview

Determining the correct target requires significant research to fully understand the community's assets and how those assets would increase competitiveness by aligning with the targets' key location factors. For Westerville, having a limited amount of available land for locating new facilities, presented a challenge that required creativity and thoughtful analysis in consideration of how remaining property might best be used, as well as what potential growth sectors have limited space requirements. Additionally, it is critical that the sector is in growth mode, with expectations that the growth will continue into the future.

For this strategy, the identified targets ultimately were considered in terms of the potential for development or redevelopment of key districts within Westerville. While the areas within the city had previously been identified, they now have target sectors that are well suited to make the highest and best use of each area and the available properties within them. The areas and targets are outlined in the table at right, while detail on each target is highlighted in this section.

TARGET SECTORS
Legacy Business & Industry
Life Sciences - R&D, Genomics, Healthcare
Entrepreneurs/Startups - FinTech, InsurTech, HealthTech
Professional & Technology Services – Engineering & Design Firms, IT & Software Services, Logistics
Corporate & Regional HQ
Intel Customers

BENCHMARK COMMUNITY TARGETS

Benchmark Community Targets					
Westerville	Fishers, IN	Franklin, TN	Georgetown, TX	Gilbert, AZ	Morrisville, NC
Life Sciences	Real Estate	Corporate Operations	Advanced Manufacturing	Biotechnology & Life Sciences	Advanced Medical Technologies
Entrepreneurs/ Startups	Finance & Financial Services	Healthcare	Life Sciences	Advanced Business Services	Biotechnology and Life Sciences
Corporate/ Regional HQ	Healthcare, Pharmaceuticals & Medical Devices	Technology	Professional Services	Aerospace & Aviation	Software/IT
Professional & Technology Services	Advertising & Marketing	Research & Development	Destination Retail	Clean Technology & Renewable Technology	
Intel Customers	Retail & Shops			Manufacturing	
	Technology & IoT			Finance & Insurance	

CURRENT TARGETS

Westerville – One Columbus – JobsOhio 2022 Targets		
Westerville	One Columbus	Ohio
Corporate & Regional HQ	Automotive & Mobility	Advanced Manufacturing
Finance & Insurance	Fashion & Retail	Aerospace & Aviation
Healthcare	Finance & FinTech	Automotive
Logistics Services	Insurance & InsurTech	Advanced Mobility
Technical Support Center	Life Sciences	Energy & Chemicals
	Semiconductor Supply Chain	Financial Services
		Food & Agribusiness
		Healthcare
		Logistics & Distribution
		Military & Federal
		Technology

EMERGING TARGETS RESEARCH

Additional secondary research was conducted on emerging markets and technologies that could influence or shape industries of the future.

AI/Cloud/IoT	
Sector Defined	<p>Artificial Intelligence (AI)</p> <ul style="list-style-type: none"> ▪ Artificial intelligence is intelligence demonstrated by machines ▪ Artificial intelligence is used in automation, machine learning, machine vision, natural language processing, robotics, and self-driving cars ▪ AI has applications in all industry sectors; but specific industries where AI can make a major impact include healthcare, business, education, finance/insurance, law, manufacturing, banking, transportation/logistics, and defense <p>Cloud</p> <ul style="list-style-type: none"> ▪ Global network of remote servers that operates as a single ecosystem, commonly associated with the internet <p>IoT</p> <ul style="list-style-type: none"> ▪ The Internet of Things describes physical objects with sensors, processing ability, software, and other similar technologies that receive and send data ▪ “Internet of Things” (IoT) is a system of interconnected devices dedicated to performing a single or a set of functions
Growth Trends	<p>AI</p> <ul style="list-style-type: none"> ▪ Global Artificial Intelligence (AI) market valued at \$93.5 billion in 2021 ▪ Expected to grow at a compound annual growth rate (CAGR) of 38.1% between 2022 and 2030 ▪ Research and innovation directed by tech companies are driving the adoption of advanced technologies in industry verticals, including: <ul style="list-style-type: none"> ▪ Automotive ▪ Healthcare ▪ Retail ▪ Finance ▪ Manufacturing

EMERGING TARGETS RESEARCH

AI/Cloud/IoT (continued)

Growth Trends

AI

- Advertising & media firms led the market and accounted for more than 19.5% of the global revenue share in 2022
- Other large end-users of AI technology include finance & insurance and healthcare
- Large employers in the industry include:
 - Amazon Web Services
 - Google
 - IBM Watson Health
 - Intel Corporation
 - Microsoft
 - NVIDIA

Cloud

- Global cloud computing market was valued at **\$483 billion** in 2022
- Expected to grow at a CAGR of **14.1%** from 2023 to 2030
- Large growth is expected to come from increased ability of cloud computing to improve business performance in **large enterprises**
- Data privacy and security concerns may hinder the market growth
- End users of cloud services include:
 - **Banking, Financial Services, and Insurance** (over 25 percent of customer base)
 - IT & Telecom
 - Retail
 - Manufacturing

EMERGING TARGETS RESEARCH

AI/Cloud/IoT (continued)

Growth Trends

Cloud

- Large employers in the industry include:
 - Adobe Inc.
 - Alibaba Group Holding Ltd.
 - Amazon.com Inc.
 - Google LLC
 - International Business Machines Corp.
 - Microsoft Corp.
 - Oracle Corp.
 - Salesforce.com Inc.
 - SAP SE
 - Workday, Inc.

IoT

- The global IoT market was valued at **\$310 billion** in 2020
- Expected to reach **\$1.8 trillion by 2028** with a **CAGR of 24.5%**
- Expansion of **e-commerce** and developments in **retail**

- Large employers in the industry include:

- GE
- Microsoft
- Amazon Web Services
- IBM
- Google
- Cisco Systems
- Hewlett Packard
- Intel
- Oracle



EMERGING TARGETS RESEARCH

AI/Cloud/IoT (continued)

Activity in the Region

Intel

- \$20 billion investment to develop semiconductor manufacturing facility in Central Ohio

Amazon

- Investing an additional \$7.8 billion through 2029 in Ohio-based cloud computing operations

Google

- Announced plans to build two new data centers in Central Ohio in 2023
- These new centers, which are already being built, will bring the total investment to more than \$2 billion
- Over 587,000 Ohio businesses received business from Google's presence

Wendy's

- Announced plans to test AI technology in Columbus chains

The Ohio State University

- Hybrid Autonomous Manufacturing, Moving from Evolution to Revolution (HAMMER) Engineering Research Center established in 2022
- The center will create approaches central to next-generation manufacturing to create jobs, train a diverse workforce, and ease supply chain issues by growing a new American industry
- Focuses on impact of AI on manufacturing and the supply chain

The Central Ohio Transit Authority (COTA)

- Embarking on a grant-funded project — along with the state Department of Transportation, 12 surrounding counties, and others, to use AI technology and data to predict collisions and congestion

EMERGING TARGETS RESEARCH

Battery/Energy Storage	
Sector Defined	<p>Energy storage</p> <ul style="list-style-type: none"> ▪ The capture of energy produced at one time for use later to reduce imbalances between energy demand and production
Growth Trends	<ul style="list-style-type: none"> ▪ Growth is dependent on the mining of resources to make the electric vehicle battery, which include nickel, manganese, cobalt, and lithium ▪ The global energy storage market was valued at \$10.4 billion in 2022 and is expected to grow to \$37 billion by 2027, with a CAGR of 20 percent ▪ Large employers in the industry include: <ul style="list-style-type: none"> ▪ Tesla ▪ General Electric ▪ AES Corporation ▪ SK Battery ▪ Sulzer Ltd. ▪ Global industrialization is driving the market growth ▪ Government support for energy storage systems development ▪ Demand from the solar, automotive, and electronics industries
Activity in the Region	<p>EVE Energy North America</p> <ul style="list-style-type: none"> ▪ In 2022, announced plans to build a new R&D facility focused on testing, design, and storage of lithium-ion batteries



EMERGING TARGETS RESEARCH

Battery/Energy Storage (continued)

Activity in the Region

Cirba Solutions

- EV battery recycling company based in Lancaster, OH
- Expanding its lithium-ion recycling operations in Ohio to meet the rising U.S. demand for the metals and minerals used to make batteries, including lithium, nickel, cobalt, and manganese

Honda and LG Energy Solutions

- Announced a joint venture to build a \$4.4 billion battery factory in Ohio where Honda's main U.S. factory is located
- Aiming for 40 gigawatt-hours annual production capacity – enough to power more than 700,000 vehicles, according to the companies
- LG's joint venture with Honda is part of its roughly \$10 billion investment plan to open four new battery manufacturing plants in North America by 2025



EMERGING TARGETS RESEARCH

Digital Wallet/FinTech

Sector Defined

FinTech

- Emerging industry in the financial sector that seeks to use technology to improve financial activities

Digital Wallet

- Financial transaction application that runs on any connected device
- Securely stores payment information and passwords in the cloud

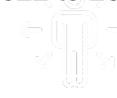
Growth Trends

FinTech

- FinTech market size is expected to grow at a CAGR of 10 percent between 2022-2027
- Financial technology revenues are projected to grow sixfold from \$245 billion to \$1.5 trillion by 2030
- FinTech sector, which currently holds a 2% share of the \$12.5 trillion in global financial services revenue, is estimated to grow up to 7%
- Banking FinTech is expected to constitute almost 25% of all banking valuations worldwide by 2030

Digital Wallet

- The global mobile wallet market size was valued at \$6.2 billion in 2021
- Expected to expand at a CAGR of 27.4% from 2022 to 2030



EMERGING TARGETS RESEARCH

Digital Wallet/FinTech

Growth Trends

Digital Wallet (continued)

- Increasing penetration of smartphones and the internet and the growing e-commerce sector are major drivers of the market
- Retail, Banking, Digital Currencies, and Hospitality are major drivers of the growth
- Large employers in the industry include:
 - Amazon Web Services Inc.
 - Visa Inc.
 - American Express
 - PayPal Holdings Inc.
 - Apple Inc.
 - Google Inc.
 - Airtel
 - Mastercard
 - Alipay
 - Samsung
 - AT&T

Activity in the Region

- 4 percent historic growth in FinTech industry cluster in Westerville labor market
- 2 percent projected growth in Westerville labor market for industry



EMERGING TARGETS RESEARCH

Genomics/Life Sciences

Sector Defined

Life Sciences

- The life sciences industry comprises companies operating in R&D, manufacturing of pharmaceuticals, biotechnology (food or medicines), medical devices, and biomedical technologies

Genomics

- Genomics is the study of human genes and chromosomes

Growth Trends

- According to the Life Sciences Workforce Trends Report, the sector has been growing and experienced growth even during the COVID-19 pandemic
- 2.53 million unique job postings between 2017 and 2020
- Increased emphasis on life sciences R&D since the COVID-19 pandemic
- The global genomics market size was valued at \$20.1 billion in 2020 and is expected to grow at a CAGR of 15.35 percent between 2021 and 2028
- Genomics has become increasingly important as DNA and mRNA become more central to the life sciences focus

Activity in the Region

- 4 percent historic growth in FinTech industry cluster in Westerville labor market
 - 2 percent projected growth in Westerville labor market for industry
- Nationwide Children's Hospital & Andelyn Biosciences Inc.**
- Conduct research to develop gene therapy to treat Duchenne muscular dystrophy
 - In June 2023 the FDA approved gene therapy developed by Andelyn Biosciences in Central Ohio

CONSIDERATIONS & FINDINGS

Considerations:

- Limited Space
 - Limited amount of available commercial property for new development
 - Adapting the target industry process due to limited amount of both greenfield and commercial real estate suitable for emerging industries such as life sciences

- Workforce Competition
 - Focus on industries that are complementary to the existing business base – *need to sustain and support the current industry mix and not aggressively compete with it*

- Redevelopment Opportunities
 - Opportunities around redevelopment / infill of aging commercial and office property

The recommended targets are on the following page, in addition to descriptions of each sector and subsector, overviews of key industry trends, and a listing of Westerville's assets that are attractive to each sector.

Westerville should focus on having the appropriate real estate available in the right areas to support future business growth rather than focusing on specific industry sectors as in the past. Targets in the Advance Westerville strategic plan are focused on continuing to build the right foundation of talent, real estate product, and job creation.

FINDINGS



Legacy Business &
Industry



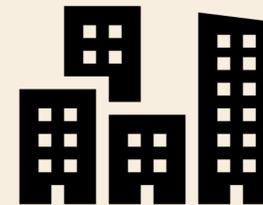
Life Sciences



Entrepreneurship &
Startups



Professional &
Technology Services



Corporate & Regional
Headquarters

LIFE SCIENCES

Sector Highlights

- **7 percent** projected growth in sector nationally (2023-2028)
- Nationwide Children's Hospital & Andelyn Biosciences Inc. are major gene therapy R&D leaders in Central Ohio
- Opportunity in Central Ohio to pursue life sciences – research at The Ohio State University Center for Life Sciences
- Global genomics market is expected to grow at a CAGR of 15.35 percent between 2021 and 2028

Focuses:

- Genomics
- Healthcare Technologies
- R&D

Westerville Assets:

- Nationwide Children's Medical Campus
- OSU Wexner Medical Campus
- Mt. Carmel St. Ann's Hospital
- Existing talent pool and client base

ENTREPRENEURSHIP & STARTUPS

Sector Highlights

- The global FinTech market size is expected to grow at a CAGR of **10 percent** between 2022-2027
- The global FinTech market is valued at **\$133 Billion** (2022)
- The global InsurTech market size was valued at **\$5.45 billion** in 2022
- Global InsurTech market is expected to expand at a CAGR of **52.7 percent** from 2023 to 2030

Focuses:

- FinTech
- InsurTech
- Healthcare Tech

Westerville Assets:

- The Point - Otterbein University
- Existing Corporate Employers
- Educated Workforce
- Westerville Area Chamber
- Elevate Westerville
- COhatch Westerville

FINANCIAL, PROFESSIONAL, & TECHNOLOGY SERVICES

Sector Highlights

- Global revenue in Professional Services expected to grow at CAGR of 5.62% (2023-2028)
- Global engineering services market projected to grow at CAGR of 3.3 percent (2023-2027)
- 45-percent historic growth in Software Publishers in Westerville (2018-2023)
- Intel - \$20 billion investment to develop semiconductor manufacturing facility in Central Ohio
- 27-percent historic growth in IT services cluster in nation (2018-2023)
- 13 percent projected growth in IT services cluster in nation (2023-2028)

Focuses:

- Engineering & Design Firms
- IT & Software Services
- Logistics

Westerville Assets:

- City-owned data center – We-Connect
- Proximity to Downtown Columbus and regional communities (via interstates)
- Proximity to John Glenn International Airport
- Educated Workforce
- Existing customer base
- Otterbein University
- The Ohio State University (Columbus)

C O R P O R A T E & R E G I O N A L H E A D Q U A R T E R S

Sector Highlights

- 96% historic growth in Activities Related to Credit Intermediation in Westerville (2018-2023) – largest industry sub-sector growth and includes jobs related to FinTech and digital banking operations (Chase, Wells Fargo, etc.)
- 2 percent projected growth in Corporate HQ cluster in Westerville (2023-2028)
- DHL Supply Chain and JP Morgan Chase have corporate/regional HQ operations in Westerville

Real Estate Needs:

- Class A office
- Proximity to talent and amenities
- Access to hotels, conference space, and mobility assets

Westerville Assets:

- City-owned data center – We-Connect
- Proximity to Columbus
- Proximity to John Glenn International Airport
- Educated Workforce
- Existing business base
- Otterbein University
- The Ohio State University (Columbus)

5

STAKEHOLDER ENGAGEMENT FINDINGS

OTTERBEIN
UNIVERSITY
FOUNDED 1847

STAKEHOLDER ENGAGEMENT

Stakeholder engagement is a critical component of any economic development strategy. It not only allows various stakeholder groups to provide input, but it also leads to stronger support for the resulting plan. For the **Advance Westerville** plan, individual and small-group conversations were conducted with people who play some role in the overall success of Westerville's economic development efforts. In addition to interviews and group discussions, it was also important to seek input from the broader community, including an online employer survey and two in-person resident forums.

Stakeholder Discussion Overview

Conversations with stakeholders addressed a variety of topics pertinent to the development of this plan. These discussions not only allowed key stakeholders to share their opinions, but they also allowed the Boyette team to learn a bit more about Westerville and go beyond the data analytics to understand the personality of the community. Additionally, stakeholder conversations often result in uncovering something that has not previously been discussed or results in a potential strategy idea to further research. A list of the discussion participants and a summary of the stakeholder discussion findings are found below.

Business Leader Survey Overview

The business leader survey was developed by Boyette in collaboration with the City of Westerville. The Westerville team distributed the survey links through social media, email, and collaboration with other groups who had email lists of Westerville employers.

STAKEHOLDER ENGAGEMENT

Discussion Participants

- Employers
- Entrepreneurs
- Educators
- Economic Development Partners

Interviewees

89

Business Leader Survey
Responses

65

STAKEHOLDER ENGAGEMENT PARTICIPANTS

Name	Organization
Tom Harris	CGI
Kevin Weaver	City of Westerville
Chris Monacelli	City of Westerville
Tara Trigg	City of Westerville
Brian Gorenflo	City of Westerville
Dick Lorenz	City of Westerville
Nathan Lang	City of Westerville
Karl Craven	City of Westerville
Ed Ungar	City of Westerville
Carolyn Thurman	City of Westerville
Rachel Ray	City of Westerville
Stephen Gale	City of Westerville
Rob Rishel	City of Westerville
Jason Bechtold	City of Westerville
Monica Irelan	City of Westerville
Christa Dickey	City of Westerville
Erica Charles	City of Westerville

STAKEHOLDER ENGAGEMENT PARTICIPANTS

Name	Organization
Dennis Blair	Westerville City Council
Pat Knott	Group Eleven Consulting
Angie Bridges	Mount Carmel Rehabilitation Hospital
Rick Haines	Mount Carmel St. Ann's
Libby Hoang	Nationwide Children's Hospital
Erin Willett	Nationwide Children's Hospital
Angela Cox	Nationwide Children's Hospital
Matt McCollister	One Columbus
Jessica Pfister	OSU Wexner Medical Center
Jodi Kuri	OSU Wexner Medical Center
Wendy Sherman Heckler	Otterbein University
Erin Bender	Otterbein University (The Point)
Matt Macleod	Status Solutions
Mike Macleod	Status Solutions
Colleen Gilger	The Ohio State University
Lynn Aventino	Uptown Westerville, Inc.
Nancy Nestor-Baker	Uptown Westerville, Inc.
Erin Hill	Westerville Public Library

STAKEHOLDER ENGAGEMENT PARTICIPANTS

Name	Organization
Kristin Michel	Westerville Public Library
Erin Francouer	Westerville Public Library
Michael Swartz	Lake Shore Cryotronics
Josh Plieniger	Metz Bailey McLoughlin
Bruce Bailey	Metz Bailey McLoughlin
Mike Carlson	DiCarlo's Pizza
Dr. Coutanya Coombs	Westerville City Council
Charlene C. Kott	Asset Management Consultants
Bill Bishop	Associated Insurance Agency
Ella Williams	Posh Teatime Co.
Stephanie Robinson	Westerville Area Resource Ministry
Dina Shultz	FCBank
Gene Hollins	Law Office of Gene Hollins
John Kellogg	Westerville City Schools
Ashley Fellers	Trailhead Financial Partners
Sorona Welsh	Leverage HR
Jeff Akers	Columbus State Community College

STAKEHOLDER ENGAGEMENT PARTICIPANTS

Name	Organization
Amy Balster	Keller Williams Excel Realty
Laura Hartman	Status Solutions
Patrick Harris	COTA
Janet Davis	Westerville Area Chamber
Tamara Howard	Spectrum
David Grimes	Westerville City Schools
Firas Alnemer	Group Eleven Consulting
Rachel Ottavi	City of Gahanna
Adam Price	Exp Realty
Dale Ganobsik	T. Marzetti
Brian Dew	Mid-City Electric
Ryan Dew	Mid-City Electric
Mike Ashanin	COPC
Cheryl Lim	Vertiv
Megan Reamsnyder	Westerville City Council
Mike Heyeck	Westerville City Council
Jamie Brundret	Westerville resident
Michael Rudy	Westerville resident

STAKEHOLDER ENGAGEMENT PARTICIPANTS

Name	Organization
Ber Swihart	Westerville resident
John Sadler	Westerville resident
Andrew Grandjean	Westerville resident
Ted Chaney	Westerville resident
Lia Casino	Westerville resident
Mark Wallingen	Westerville resident
Chuck Grady	Westerville resident
Sandra Callas	Westerville resident
Anne Van Buskirk	Westerville resident
Jeff Heckman	Westerville resident
Chris Cunther	Westerville resident
Anige Finkel	Westerville resident
Ken Truax	Westerville resident
Jim Logue	Westerville resident
John Spitale	Westerville resident
Craige Young	Westerville resident
Debra Boardley	Westerville resident
Leigh Hollins	Westerville resident
Lois Huff	Westerville resident

STAKEHOLDER INTERVIEW HIGHLIGHTS

What is your top priority or outcome for this project?

- “Broader business incubator collaboration with Otterbein”
- “Create a physical and economic technology zone for high-tech companies”
- “Don’t focus on “retail” but focus on “entertainment”
- “Don’t develop Intel-specific sectors, but focus on product development”
- “If I had unlimited resources, I would fund a Young Professional recruitment program”
- “Increase the number and quality of restaurants and entertainment options”
- “Make Westerville attractive for young professionals”
- “Medical support staff is lower income and rely on public transportation; there is a need to improve these services”
- “Need for more Medical Mile branding”
- “Need for more mixed-use”
- “Need for more places that DHL execs could go out to dinner during corporate conferences”
- “Need for more product for development”
- “Opportunities could be around bio-tech, life sciences, and healthcare IT”
- “Redevelopment of old strip malls and shopping centers”
- “Replace aging commercial buildings with apartments or entry-level housing”
- “Streamline the planning process”
- “Westerville needs to brag more”
- “Westerville should protect its resources and not go after large Intel suppliers”
- “Workforce housing development is in demand”
- “Westerville shouldn’t focus on attracting an industry, but should focus on being business friendly and ready – invest in the infrastructure, product development, and redevelopment”

STAKEHOLDER INTERVIEW SUMMARY

What is your top priority or outcome for this project? (continued)

- “Capture growth and opportunities, but maintain our quality of life”
- Development of Braun Farm
- Don’t focus on “retail” but focus on “entertainment”
- Growth opportunities for the city
- Housing
 - Attainable/workforce housing
- Improving the number/quality of restaurants and entertainment opportunities
- Increase marketing efforts
 - “Westerville needs to brag more”
 - “Westerville is too quiet”
 - “Advertise Westerville as a place to work, live, and play”
- Land acquisition
- Making Westerville attractive for young professionals
- Plan for annexation/opportunities that expand the city's available land for development
- Prepare for Intel
- Redevelopment/infill plans
 - “Revitalization of old strip malls and shopping centers”
 - “Improving our old commercial corridors”
 - Mixed-use redevelopment
- Refining target sectors
- Strengthen the relationship between the City and Otterbein by expanding opportunities to collaborate
- Workforce development

STAKEHOLDER INTERVIEW SUMMARY

From an economic development perspective, what makes Westerville a great place?

- "Events Uptown are great"
- "Small town feel with large city amenities"
- "When the Westerville business community wins, we all win"
- "We feel supported by the city and economic development department"
- Economic incentives
- "Westerville is a mature community with its own identity"
- "We have a diverse community that is attractive to people"
- Housing is more affordable relative to the other suburbs
- Intelligent workforce
- Otterbein
- "Strong economic base"
- "It is a great place to live because of all the economic activity"
- Quality of the culture
- "Sense of community"
- "Small city feel, but with big city opportunities"
- "Great place to raise a family"
- "There is a cohesion here"
- "Great parks, trails, and recreation"
- Proximity to Columbus
- "The community feels safe"
- "I think our overall track record as a city helps us remain competitive for economic development"
- Community center
- "Uptown is great"
- "Westerville data center"
- Municipal electric
- Lack of traffic
- Access to the interstate
- Strong office product
- Westar

STAKEHOLDER INTERVIEW SUMMARY

What would make Westerville even greater?

- Increased availability of industrial product
- Increasing fiber access
- Making Westerville more attractive to young professionals
- Medical Mile branding
- More entertainment amenities
- More mixed-use
- More real estate product for development
- More restaurants
- Preserving the greatness of Uptown, but improving its allure
- Redevelopment and infill
 - Aged commercial corridors and strip malls
 - Brownfield redevelopment
 - East of Africa
 - McGill site on East Broadway
 - Southern portion of the city
- Renewable mix of electric generation
- Attainable/Workforce housing
- Enhanced collaboration with Otterbein
- Streamlined planning and permitting processes?

STAKEHOLDER INTERVIEW SUMMARY

What types of industry sectors should Westerville focus on?

- Architecture firms
- Bio-tech
- Customers of Intel, including R&D firms, advanced manufacturers, and other purchasers of semiconductors/chips
- Data centers
- “Don’t develop Intel-specific sectors, but focus on having the right type of real estate product and infrastructure to capture growth when it comes”
- Engineering firms
- Entertainment
- Healthcare manufacturing
- Healthcare supply chain
- IT
 - Healthcare IT
 - Tech development
- Life Sciences
- Light manufacturing
- Mixed-use / vertical residential
- Pharmaceutical manufacturing
- Professional services
- Restaurants
- Small businesses
- Small-scale suppliers for Intel
- “Westerville should protect its resources and not go after large Intel suppliers”
- “Westerville shouldn’t focus on attracting an industry, but should focus on being business friendly and ready – invest in the infrastructure, product development, and redevelopment”

STAKEHOLDER INTERVIEW SUMMARY

What are the greatest economic development opportunities for Westerville over the next five years?

- Annexation/growth opportunities
- Becoming more attractive to young professionals
- Fiber
- Honda in Columbus
- Improvement of a “creative scene”
- Increased workforce programming
- Increasing number and quality of restaurants and entertainment options
 - “There is an opportunity to add more activities for young professionals”
 - “Places that DHL execs could go out to dinner during corporate conferences”
- Intel
 - “How can we capture some of the success from Intel to support equitable growth and development”
- Mixed-use development
- More restaurants and entertainment amenities
- Otterbein
- Redevelopment/infill
 - “Redevelopment of South State Street”
 - “Doing things to make our corridors feel more vibrant”
 - Brooks Edge Plaza
- Workforce housing development

STAKEHOLDER INTERVIEW SUMMARY

What one news headline would you like to see about Westerville in the next three to five years?

- “Growth in industry and fiber make Westerville a smart city”
- “Major development planned for East of Africa”
- “Major expansion announced at Westar”
- “Otterbein student population grows”
- “Redevelopment of Brooks Edge”
- Something about increased diversity and inclusion
 - “Specifically for the Somali community”
- “Westerville embraces mixed-use”
- “I would like to see more articles just putting our intentions out there. Make it clear that we are a city that wants to progress and move forward and pull in this type of high-quality investment.”
- “Westerville gets cool new amenities, but retains its character”
- “Westerville has innovative and forward-thinking leadership”
- “Westerville lands US HQ for international business”

STAKEHOLDER INTERVIEW SUMMARY

If you had unlimited resources, what would you like to see happen in Westerville as it relates to Economic Development?

- Attainable/workforce housing
- Branding and identity
 - Improve visibility from highway
 - Branding for the “Medical Mile”
- Bridge the gap between the northern and southern parts of the city
- Buy/annex land
- Create tax incentives
- Development incentives
- Expand bike trails and green space
 - “More bike plans and multi-use paths”
 - “More parks”
- Expansion of bus services
 - “Would like to see more covered bus stops”
 - “Our support staff is lower income and rely on public transportation”
 - “Public transportation is an issue”
- Increase the number/quality of retail, restaurant, and entertainment options
- Increasing funding for public library
- Infrastructure development/expansion
- Invest more in the school district
- Land banking
- “Product development”
- “Need to start buying up empty properties”
- Mixed-use entertainment development
- “Like Bridge Park”
- Prepare infrastructure for Intel
- Redevelopment of the city
- Revisit the zoning code
- Young professional recruitment program

Stakeholder Engagement Findings

BUSINESS LEADER SURVEY HIGHLIGHTS

What do you believe are the top five greatest challenges facing Westerville from an economic development perspective? (Top 5 Answers)

- Traffic
- Workforce Availability
- Available Housing
- Cost of Living
- Available Commercial Real Estate

As it relates to economic development, if the City of Westerville had unlimited resources, what would you like to see happen? (Top 5 Answers)

- More Retail, Restaurant, and Entertainment
- Expand Workforce Housing Options
- Provide Additional Business Support
- Address Parking Issues
- Expand Fiber Access

From a business and industry perspective, what makes Westerville a great place?

- “Amenities have grown over time, amazing growth in the city. It is a great place for us to work and live and play.”
- “We have 3,000 employees and 2,000 residents of Westerville. Downtown is amazing. It is really cute relative to other downtowns. Trails and parks and other things to do.”
- “Phenomenal housing areas in Westerville.”

- Location
- “Good traffic flow to each of the commercial and industry hot spots”
- “The urban planning around that was done very well”
- “There has been great progress on Cleveland Ave and Polaris Pkwy.”
- “Otterbein is a great resource to have here”

What are the greatest challenges facing your business in Westerville?

- “Workforce and talent continues to come up”
- “The nature of work is changing, as well, and we see that in our buildings. Our operations folks could potentially be eliminated over time. That is certainly something that should be at the forethought of any strategic plan – how can they prepare the workforce for the future – analytical skills, technology, etc.”
- “Executives look at the quality of the schools in Westerville and surrounding suburbs. How does Westerville create a better reputation around the public schools?”
- “We want to keep our executives close, but many of them go to Powell because of the schools.”
- “Our people don’t really go to Uptown. You have to get through the campus and then find a place to park, so we don’t have time for that. If they could guarantee parking, it would help. They have made some progress.”

Stakeholder Engagement Findings

BUSINESS LEADER SURVEY HIGHLIGHTS

How can Westerville better support your business?

- “Not specific to Westerville, we also are concerned with safety of our employees. I don’t feel like that is an issue in Westerville, and we hope it stays that way. Given what’s happening across our city and cities across US, that tends to be a really shining point for Westerville.”
- “Schools are also on that list for us – that people are educated and prepared for the workforce.”
- “We don’t have the opportunity to walk for lunch. Continued build-out of restaurants and other conveniences will be great. The out parcels are there.”
- “Great progress has been made in the roads and the flow. Continue to invest in those areas.”
- “The other piece has to be workforce. Can Westerville do all that themselves – probably not, but they should be focused on education – getting more internships in schools for Nationwide, Cardinal Health, or corporate employers.”
- “Great schools in Westerville. If they would focus on workforce, it would help not just us, but every employer in the Columbus area.”
- “I would go back to the schools. If you are going to focus on something, that’s critical. Westerville does have good schools; it just isn’t marketed at all.”

If you had unlimited resources, what would you do to further economic development success in Westerville?

- “I think the facilities is a good call-out. Just continually looking at corporate facility stock in Westerville. What we have is just kind of aged.”
- “Our buildings here are probably tired. They will need some investment. That would be something I would think about.”

Stakeholder Engagement Findings

BUSINESS LEADER SURVEY SUMMARY

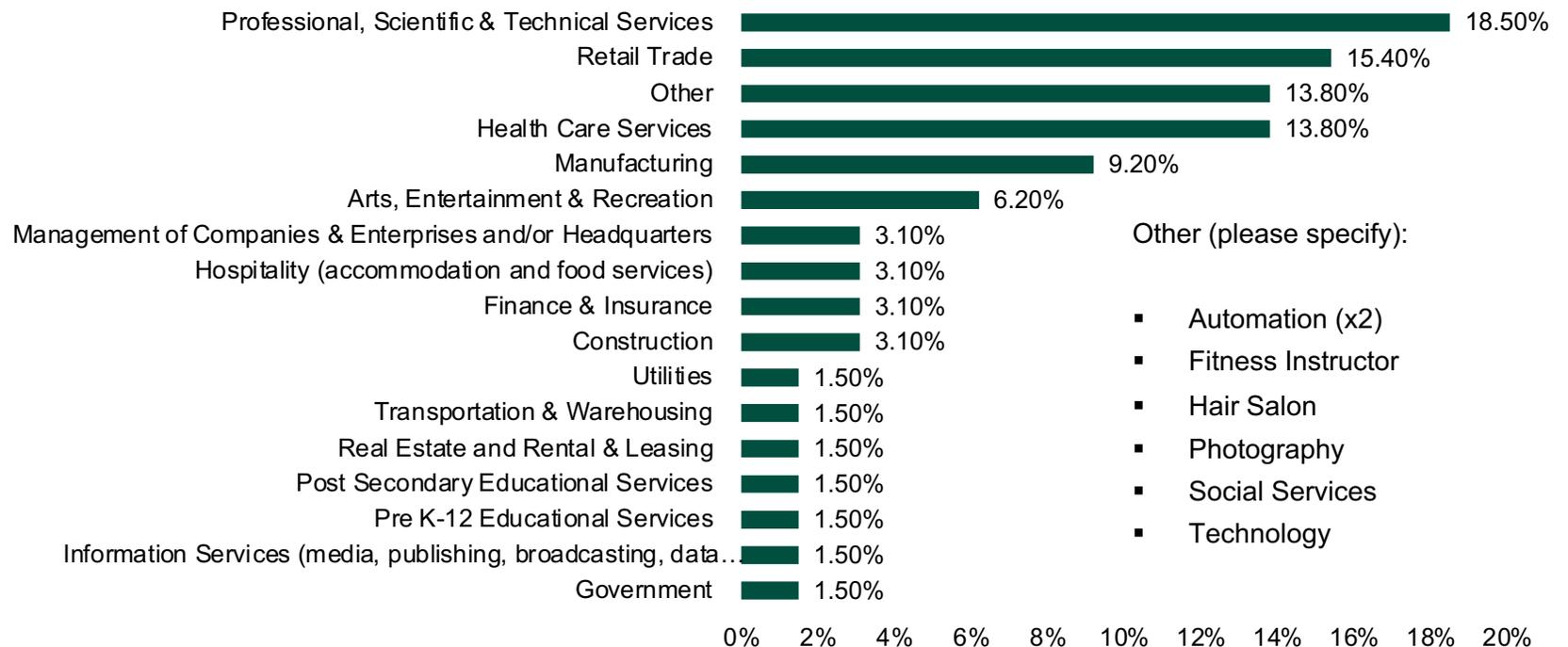
**ADVANCE
WESTERVILLE**

Retain. Develop. Support. Market.

Business Leader Survey Responses

65

What is the primary business sector in which your company operates?



BUSINESS LEADER SURVEY SUMMARY

Business leaders working in the healthcare or finance/insurance industries were asked several industry-specific questions.

Name one thing about the healthcare industry that excites you about the future.

- The demand for our products in the post-acute market continues to grow based upon the want for patients to be treated in the home setting.
- The changing roles of pharmacy and advances in terms of the level of care that we are able to provide and the opportunities that come along with it.
- Innovative ways to take care of our patients and new tools that help with diagnosis and treatment.
- Shift from medical model to holistic well-being being accepted and even celebrated in the mainstream.
- Stability
- The innovation and serving a great community like Westerville.
- The ability to help people.

Name one thing about the healthcare industry that keeps you up at night.

- Reimbursement for infusion services
- The continual decreases in insurance reimbursement for products
- Labor/staffing
- Liability
- Potential government closures

BUSINESS LEADER SURVEY SUMMARY

Name one thing about the finance/insurance industry that excites you about the future.

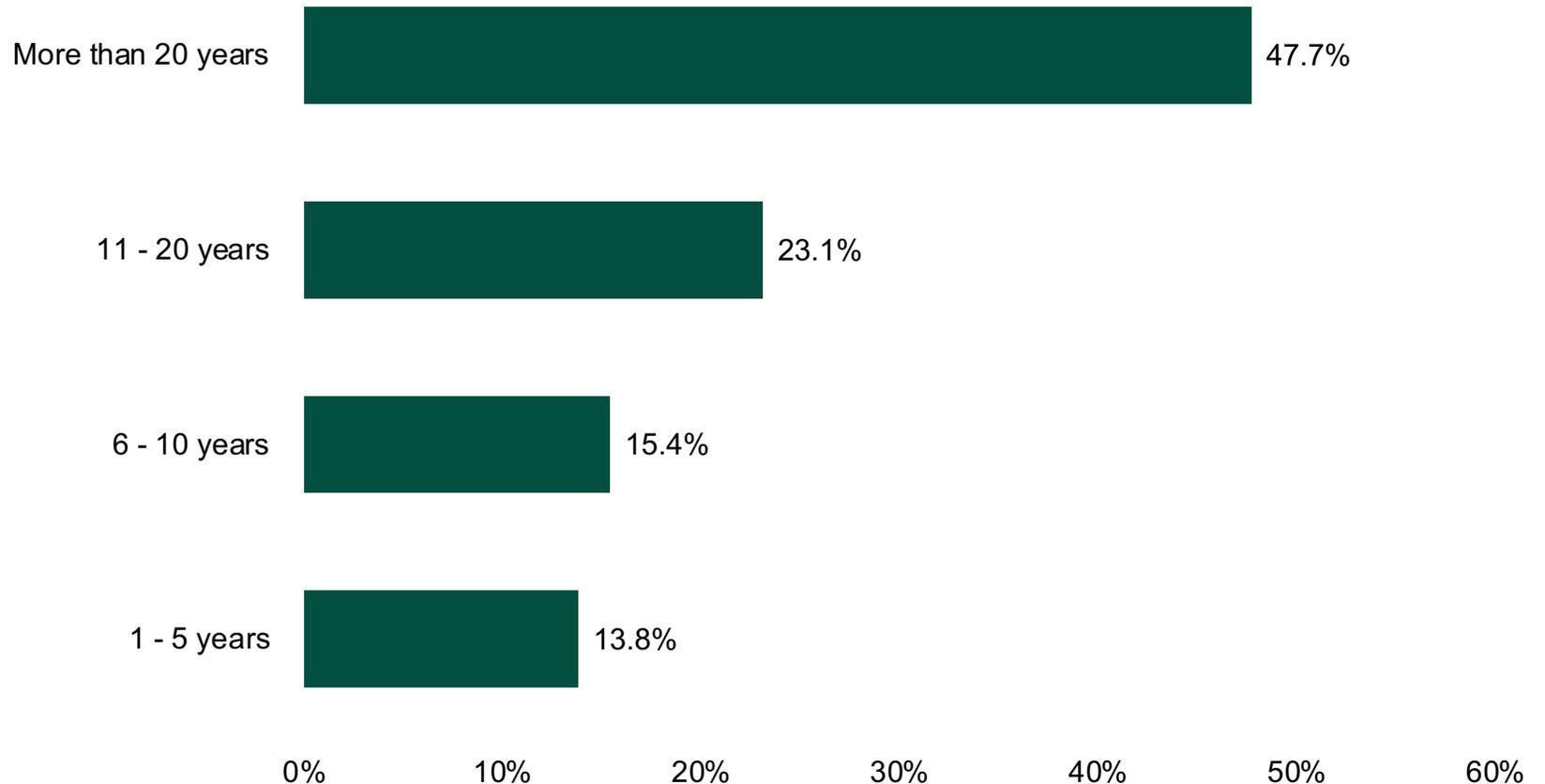
- Coaching clients to a successful retirement

Name one thing about the finance/insurance industry that keeps you up at night.

- Regulations

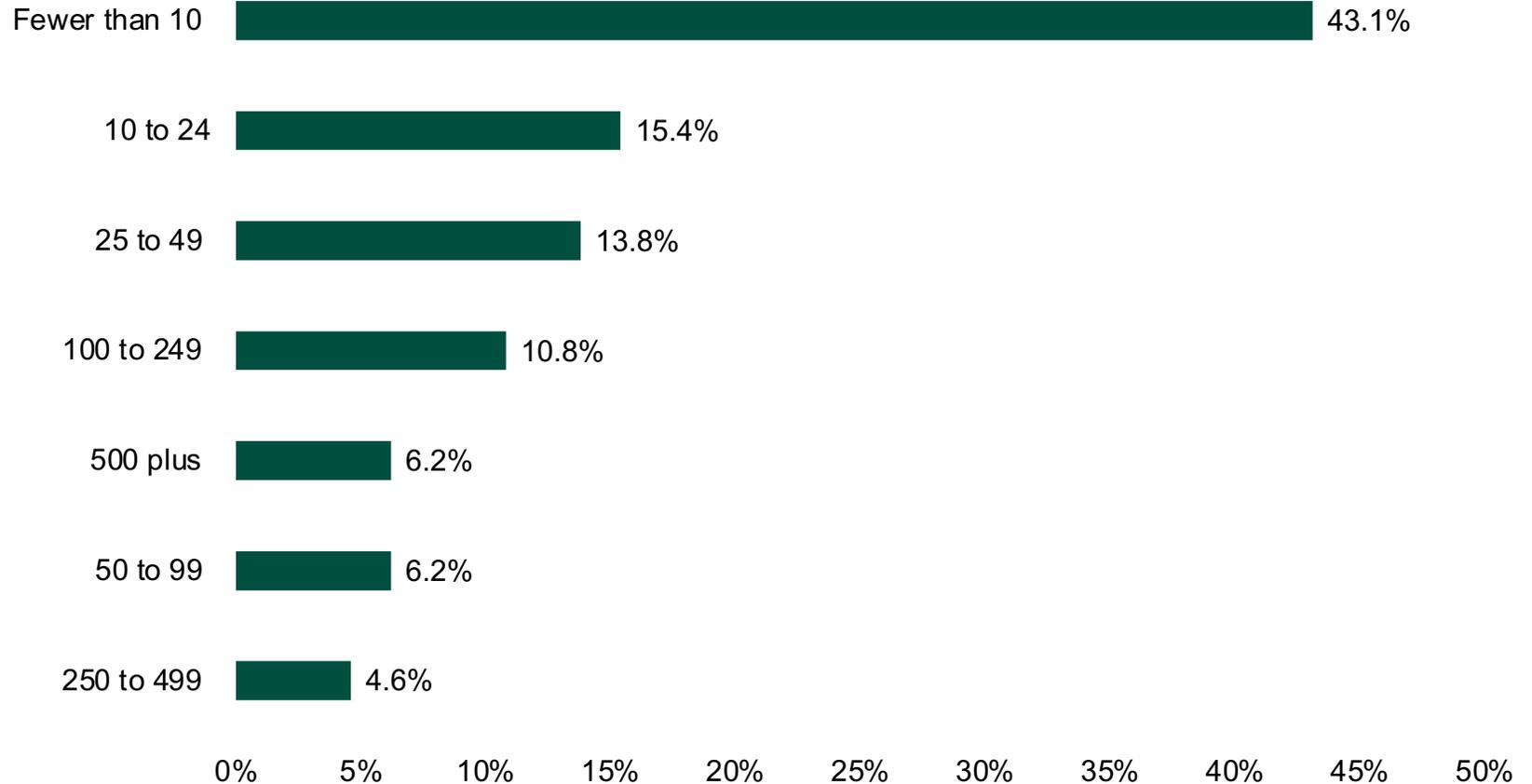
BUSINESS LEADER SURVEY SUMMARY

How long has your business been operating in the Westerville area?



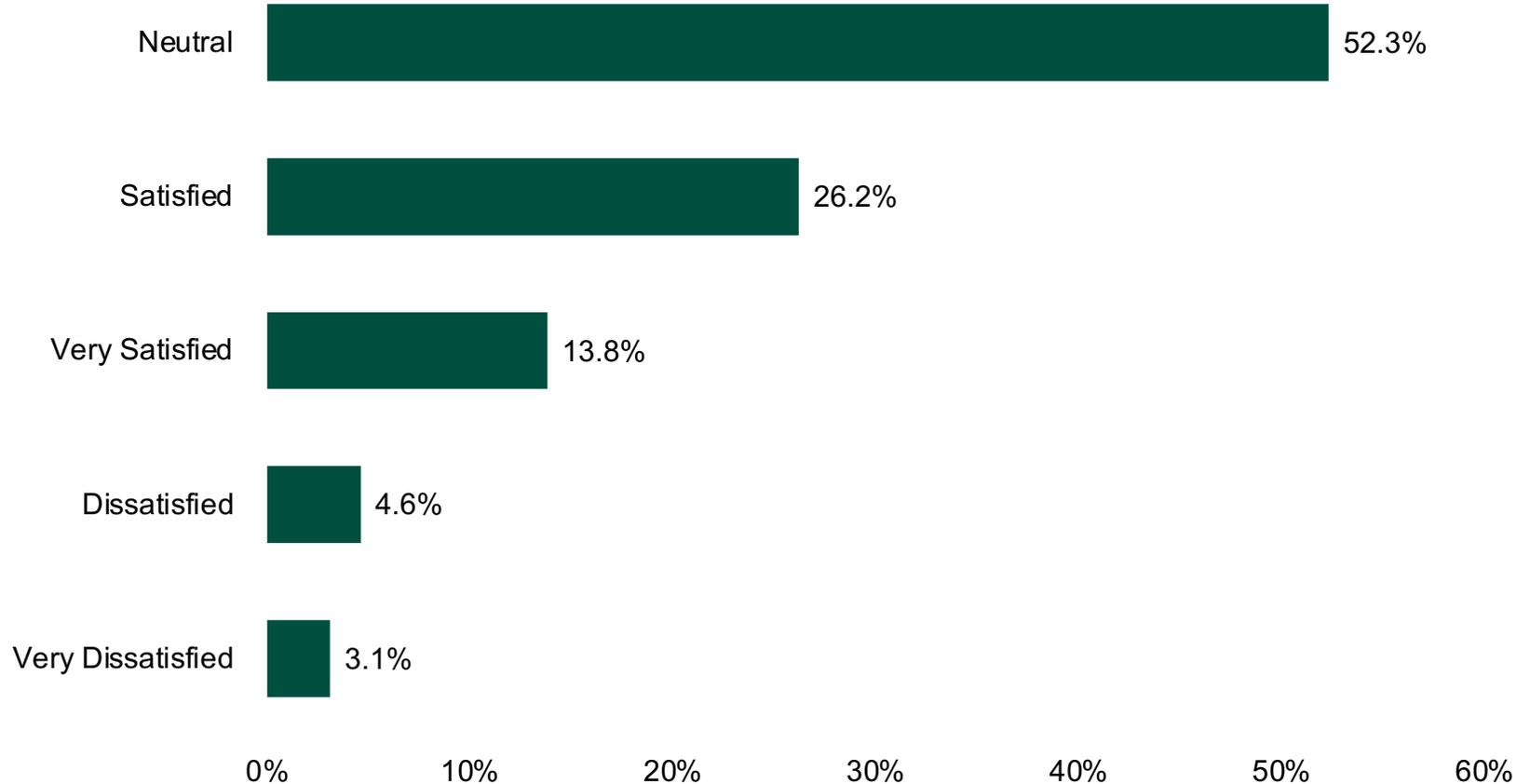
BUSINESS LEADER SURVEY SUMMARY

How many employees are assigned to your company's/organization's Westerville-area locations?



BUSINESS LEADER SURVEY SUMMARY

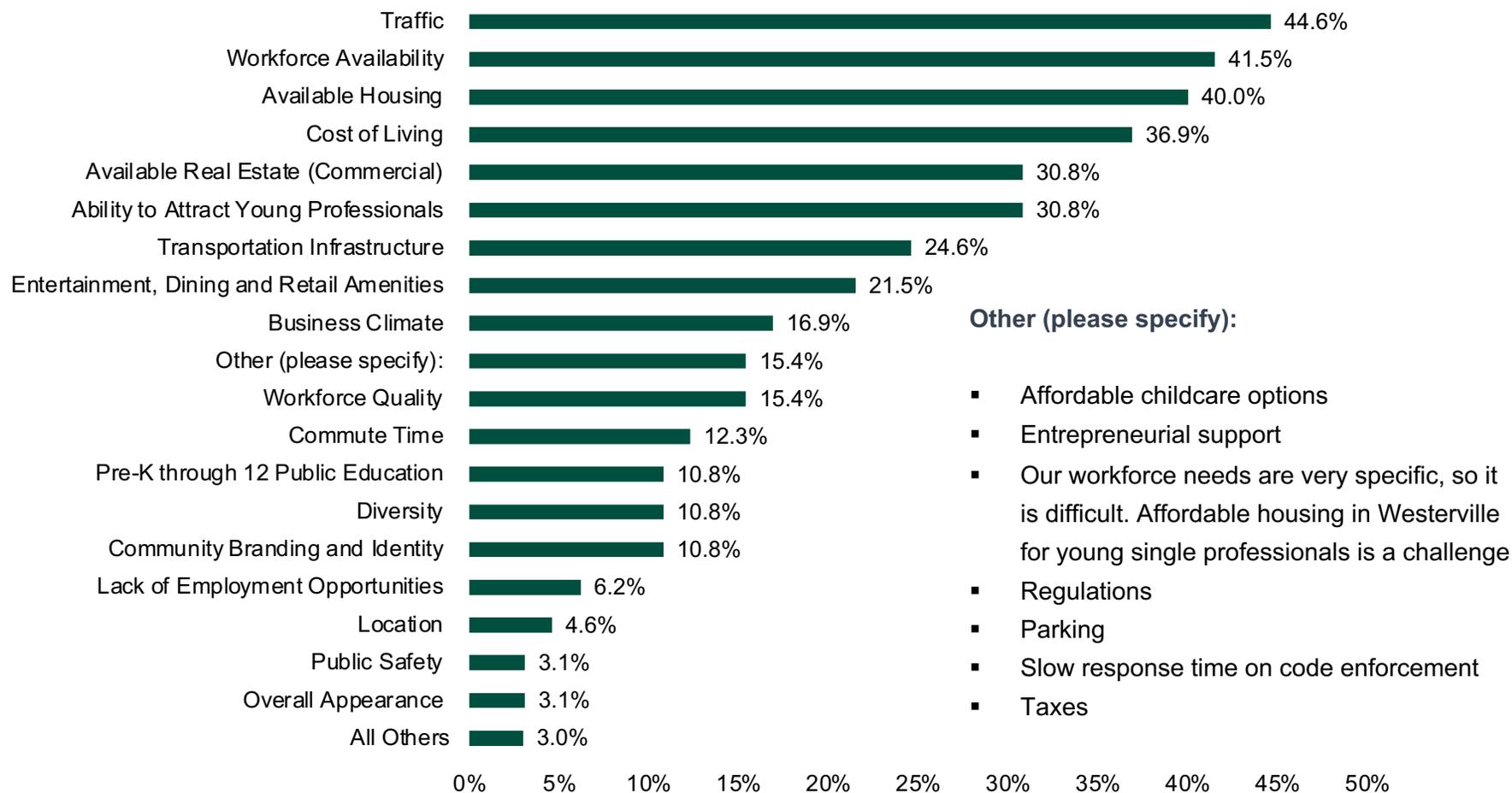
Please rate your overall satisfaction with the quality and availability of the workforce in Westerville.



Stakeholder Engagement Findings

BUSINESS LEADER SURVEY SUMMARY

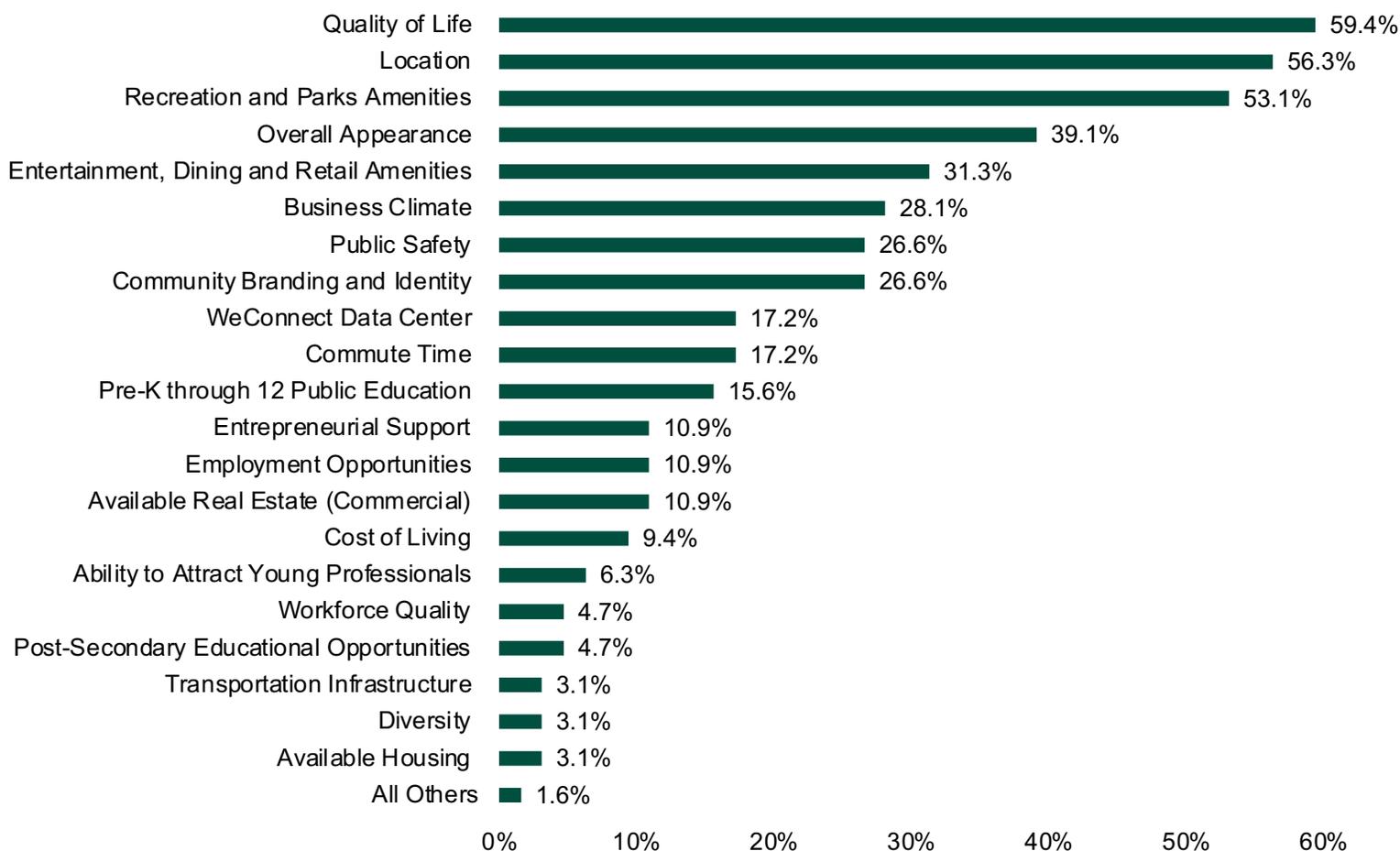
What do you believe are the top five greatest challenges facing Westerville from an economic development perspective? (Please select up to 5).



Stakeholder Engagement Findings

**BUSINESS LEADER SURVEY
SUMMARY**

What do you believe are the top five greatest assets of Westerville from an economic development perspective? (Please select up to 5).



BUSINESS LEADER SURVEY SUMMARY

What are the 1-2 critical City services that you rely on in order for your business to succeed in Westerville?

Infrastructure (x19)

- City Maintenance
- Electric (x3)
- Electricity and water
- Electric division, road maintenance
- Electric utility
- Infrastructure (Electric/Water/Sewer, etc.)
- Infrastructure expansion
- Infrastructure support
- Power & water
- Road maintenance and upkeep
- Road quality and traffic flow
- Roadways and transportation
- Utilities (x3)
- Utilities and road/parking maintenance
- Water and electric

WeConnect (x11)

Public Safety (x9)

- Police (x4)
- Fire, police, and public safety (x4)
- Law enforcement

Livability (x4)

- Amazing internet
- Great streets, access, amenities to attract quality workforce
- Beautification in Uptown area. Continued City support for public events (especially 4th Fridays, Music and Arts Festival)
- Community amenities and activities - from parks to local service-oriented businesses that make the City an attractive place to live or work.
- Sustainability Initiatives, Parks and Rec

BUSINESS LEADER SURVEY SUMMARY

What are the 1-2 critical City services that you rely on in order for your business to succeed in Westerville?

Community/Relationships (x4):

- Being connected to the local community and understanding my city
- Community development
- Partnership approach with the City and our company.
- Promotions/community opportunities
- Relationship with City representatives. Financial resources for energy savings, etc.

Economic Development (x2)

- Support from Economic Development Team
- City Council support for growth of local business

Planning & Development (x2)

- Building/zoning approval/inspection services
- Zoning and review

Parking (x2)

Workforce

- Professional labor force

Stakeholder Engagement Findings

BUSINESS LEADER SURVEY SUMMARY

As it relates to economic development, if the City of Westerville had unlimited resources, what would you like to see happen?

Retail, Restaurant, and Entertainment (x9)

- Development of lunch and coffee spots and offices along Broadway
- More entertainment opportunities, including performing arts
- Retail and mixed-use development initiative near Schrock / Cooper / Cleveland (currently vacant land north of hospital)
- More restaurants / diners / shopping like Dublin's Bridge Park
- Attract a variety of businesses to draw daytime traffic. A grocery store would be fantastic.
- More family entertainment and family-centered activities
- Westerville doesn't have the draw that younger professionals are looking for when it comes to entertainment.
- Continue to focus on young families, youth, and forward-thinking amenities which will set us apart

Housing (x8)

- More affordable housing that people making \$40,000 to \$80,000 can afford

- Affordable housing
- Expand housing opportunities
- More Housing - townhomes, multifamily, and mixed-use
- More affordable housing for low to mid-range earners
- Most of our workforce is younger; it is expensive for people to find affordable housing here
- Replace aging commercial buildings with apartments or entry-level housing
- More affordable, multi-unit housing

Business Support (x7)

- Keep encouraging new business to open
- More support for Uptown businesses not on State Street
- Broader business incubator collaboration with Otterbein
- Continue to promote the small businesses and collaborate with them
- Better signage for businesses
- More incentives to businesses to grow and move here
- Involve companies committed to having an office in Westerville in the planning and design of new construction projects

BUSINESS LEADER SURVEY SUMMARY

As it relates to economic development, if the City of Westerville had unlimited resources, what would you like to see happen?

Parking (x7)

- Advertise the parking app more
- More parking
- Add parking
- Improved parking in the Uptown district
- More parking
- Parking garages
- Parking garage in Uptown

Fiber (x5)

- Less-costly access to the fiber optic internet
- Expansion of WeConnect
- More fiber and bandwidth
- Free Wi-Fi throughout the City
- Expand WeConnect's footprint

Taxes (x5)

- Lower property taxes
- Lower taxes
- Tax rate cut. Real estate dividend payback for commercial building owners. Cost of the privilege of existing in Westerville and especially Delaware county is exorbitant

- Tax breaks for longtime businesses

- Lower property taxes

Public Transportation (x4)

- Better public transportation options
- Public transportation
- More public transit
- Better means of public transportation

Redevelopment (x3)

- Continue to revamp any shopping areas that are older/more rundown
- Fix the facades of uptown buildings
- Improve the appearance of the southern corridor into the city

Downtown Development (x3)

- Walkable business center/area with mixed-use developments
- Expansion of a more centralized downtown area
- Develop the side streets in Uptown

BUSINESS LEADER SURVEY SUMMARY

As it relates to economic development, if the City of Westerville had unlimited resources, what would you like to see happen?

Public Safety (x3)

- Crime reduction
- Continue to provide a clean and safe environment for all
- Ensure commercial buildings are ADA compliant

Product Development (x3)

- Find more available commercial real estate
- Continued development of land to attract businesses of all sizes
- Create a physical and economic technology zone for high-tech companies

Planning and Development (x2)

- Assistance from Building and Codes to maximize investment (ROI) into new builds and renovations
- Simplify the process to build and remodel

Infrastructure

- Expansion of roadways to reduce traffic congestion

Parks and Rec

- More parks and walking and bike paths

Workforce

- Career Technical Education programs focused on manufacturing

6

WORKFORCE ASSESSMENT

WORKFORCE ASSESSMENT

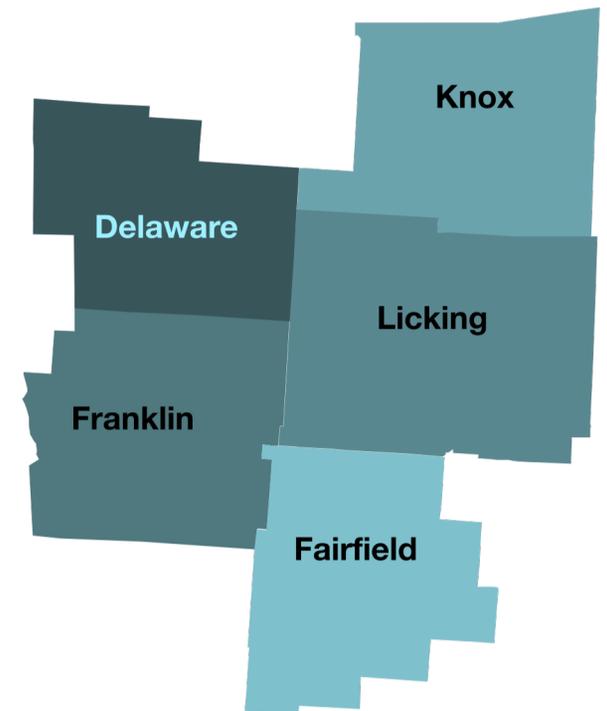
A community will not succeed in recruiting new businesses in its target sectors if there is not an adequate workforce pipeline specific to the skills needed by those targets. Boyette has completed a workforce data review related to the potential target sectors to ensure that Westerville is prepared to meet employer demand in those sectors.

The Westerville labor market area was defined in 2019 as part of a workforce assessment and asset mapping project. The area includes five counties: Franklin, Delaware, Knox, Licking, and Fairfield.

The two primary data sources utilized for the workforce component of the Westerville economic development strategy are occupational data from Lightcast and workforce questions that were included in the Westerville employer survey.

Note that the occupational analysis for the Legacy Business and Industry target is based on a broad group of occupations in the Finance and Insurance, Healthcare, Headquarters, and Manufacturing sectors.

Westerville Labor Market



OCCUPATIONAL REVIEW – Legacy Business

Westerville Target Sector Employment by Occupation

Occupation	2023 Jobs	2028 Jobs	2023 – 2028 % Change	Median Hourly Earnings	Regional Completions	Annual Replacement Jobs
Customer Service Representatives	29,163	27,908	(4%)	\$18.15	4,043	29,163
Home Health and Personal Care Aides	27,811	31,133	12%	\$11.64	4,424	27,811
Registered Nurses	24,943	26,289	5%	\$36.17	1,459	24,943
Secretaries and Administrative Assistants	22,166	21,563	(3%)	\$18.98	2,573	22,166
General and Operations Managers	19,026	19,695	4%	\$47.67	1,685	19,026
Office Clerks, General	17,782	17,465	(2%)	\$18.23	2,230	17,782
Bookkeeping, Accounting, and Auditing Clerks	13,238	13,019	(2%)	\$21.76	1,621	13,238
Accountants and Auditors	11,665	11,869	2%	\$36.86	1,013	11,665
First-Line Supervisors of Office and Administrative Support Workers	10,868	10,815	(0%)	\$29.43	1,175	10,868
Miscellaneous Healthcare Support Occupations	10,546	11,364	8%	\$18.13	1,591	10,546
Nursing Assistants, Orderlies, and Psychiatric Aides	10,379	10,701	3%	\$14.68	1,581	10,379
Management Analysts	9,913	10,414	5%	\$38.15	923	9,913
Miscellaneous Assemblers and Fabricators	9,605	9,381	(2%)	\$17.85	1,108	9,605
Logisticians and Project Management Specialists	9,562	9,960	4%	\$38.27	793	9,562
Human Resources Workers	8,949	9,164	2%	\$30.23	852	8,949

OCCUPATIONAL REVIEW – Life Sciences

Westerville Target Sector Employment by Occupation

Occupation	2023 Jobs	2028 Jobs	2023 – 2028 % Change	Median Hourly Earnings	Regional Completions	Annual Replacement Jobs
Health Practitioner Support Technologists and Technicians	6,161	6,537	6%	\$18.20	568	6,161
Diagnostic-Related Technologists and Technicians	3,604	3,753	4%	\$29.66	204	3,604
Clinical Laboratory Technologists and Technicians	2,271	2,311	2%	\$24.06	158	2,271
Medical Records Specialists	1,450	1,513	4%	\$22.45	105	1,450
Emergency Medical Technicians and Paramedics	1,355	1,452	7%	\$17.70	93	1,355
Miscellaneous Health Technologists and Technicians	1,170	1,246	6%	\$19.07	86	1,170
Occupational Health and Safety Specialists and Technicians	1,061	1,094	3%	\$36.77	111	1,061
Environmental Scientists and Geoscientists	1,049	1,084	3%	\$39.95	96	1,049
Chemists and Materials Scientists	646	668	3%	\$38.51	54	646
Opticians, Dispensing	521	525	1%	\$22.05	44	521
Medical Scientists	477	519	9%	\$36.50	30	477
Miscellaneous Life, Physical, and Social Science Technicians	446	459	3%	\$27.55	56	446
Biological Scientists	407	424	4%	\$31.25	35	407
Environmental Science and Geoscience Technicians	392	402	2%	\$19.58	41	392
Biological Technicians	380	389	2%	\$22.35	50	380

OCCUPATIONAL REVIEW – Entrepreneurship & Startups

Westerville Target Sector Employment by Occupation

Occupation	2023 Jobs	2028 Jobs	2023 – 2028 % Change	Median Hourly Earnings	Regional Completions	Annual Replacement Jobs
Customer Service Representatives	29,163	27,908	(4%)	\$18.15		4,043
Software and Web Developers, Programmers, and Testers	19,585	20,639	5%	\$45.16		1,370
General and Operations Managers	19,026	19,695	4%	\$47.67		1,685
Bookkeeping, Accounting, and Auditing Clerks	13,238	13,019	(2%)	\$21.76		1,621
First-Line Supervisors of Office and Administrative Support Workers	10,868	10,815	(0%)	\$29.43		1,175
Management Analysts	9,913	10,414	5%	\$38.15		923
Logisticians and Project Management Specialists	9,562	9,960	4%	\$38.27		793
Computer Support Specialists	9,082	8,997	(1%)	\$24.57		697
Miscellaneous Business Operations Specialists	8,235	8,383	2%	\$32.22		773
Miscellaneous Sales Representatives, Services	7,823	7,870	1%	\$28.80		841
Computer and Information Analysts	7,088	7,198	2%	\$47.62		503
Market Research Analysts and Marketing Specialists	6,997	7,503	7%	\$30.04		708
Financial Analysts and Advisors	6,220	6,397	3%	\$39.79		462
Database and Network Administrators and Architects	5,544	5,477	(1%)	\$42.00		365

OCCUPATIONAL REVIEW – Professional & Technology Services

Westerville Target Sector Employment by Occupation						
Occupation	2023 Jobs	2028 Jobs	2023 – 2028 % Change	Median Hourly Earnings	Regional Completions	Annual Replacement Jobs
Software and Web Developers, Programmers, and Testers	19,585	20,639	5%	\$45.16		1,370
Office Clerks, General	17,782	17,465	(2%)	\$18.23		2,230
Accountants and Auditors	11,665	11,869	2%	\$36.86		1,013
First-Line Supervisors of Office and Administrative Support Workers	10,868	10,815	(0%)	\$29.43		1,175
Management Analysts	9,913	10,414	5%	\$38.15		923
Logisticians and Project Management Specialists	9,562	9,960	4%	\$38.27		793
Computer Support Specialists	9,082	8,997	(1%)	\$24.57		697
Human Resources Workers	8,949	9,164	2%	\$30.23		852
Miscellaneous Business Operations Specialists	8,235	8,383	2%	\$32.22		773
Computer and Information Analysts	7,088	7,198	2%	\$47.62		503
Market Research Analysts and Marketing Specialists	6,997	7,503	7%	\$30.04		708
Miscellaneous Managers	6,476	7,026	8%	\$34.64		524
Financial Analysts and Advisors	6,220	6,397	3%	\$39.79		462
Database and Network Administrators and Architects	5,544	5,477	(1%)	\$42.00		365
Financial Managers	5,159	5,487	6%	\$61.40		393

OCCUPATIONAL REVIEW — Corporate & Regional Headquarters

Westerville Target Sector Employment by Occupation

Occupation	2023 Jobs	2028 Jobs	2023 – 2028 % Change	Median Hourly Earnings	Regional Completions	Annual Replacement Jobs
Customer Service Representatives	29,163	27,908	(4%)	\$18.15		4,043
Secretaries and Administrative Assistants	22,166	21,563	(3%)	\$18.98		2,573
Software and Web Developers, Programmers, and Testers	19,585	20,639	5%	\$45.16		1,370
General and Operations Managers	19,026	19,695	4%	\$47.67		1,685
Office Clerks, General	17,782	17,465	(2%)	\$18.23		2,230
Bookkeeping, Accounting, and Auditing Clerks	13,238	13,019	(2%)	\$21.76		1,621
Accountants and Auditors	11,665	11,869	2%	\$36.86		1,013
First-Line Supervisors of Office and Administrative Support Workers	10,868	10,815	(0%)	\$29.43		1,175
Management Analysts	9,913	10,414	5%	\$38.15		923
Logisticians and Project Management Specialists	9,562	9,960	4%	\$38.27		793
Computer Support Specialists	9,082	8,997	(1%)	\$24.57		697
Human Resources Workers	8,949	9,164	2%	\$30.23		852
Receptionists and Information Clerks	8,488	8,584	1%	\$14.51		1,172
Miscellaneous Business Operations Specialists	8,235	8,383	2%	\$32.22		773
Computer and Information Analysts	7,088	7,198	2%	\$47.62		503

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STRATEGIC GOALS

STRATEGIC GOALS

Overview

The findings of the qualitative and quantitative research and analytics have led to development of strategic recommendations in four categories, all designed to maximize Westerville's economic development assets and address any challenges that may be present during the next five years. These strategies and associated action steps provide a focus on the fundamentals of successful economic development, while also continuing to enhance the city's economic development competitiveness over the next five years.

The strategic goals will serve as a guide to strengthen the city's economic base and focus resources in areas that will help improve economic competitiveness; enhance innovation; provide a high-quality workforce; and increase awareness of Westerville's key assets. Additionally, these recommendations allow Westerville to maximize its assets and mitigate challenges that might otherwise limit the city's competitiveness. Each strategic goal and the corresponding action items are explained in depth in the main report.

STRATEGIC RECOMMENDATIONS



8

ENDNOTES

K-12 Education Data

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