THE COLUMBUS REGION

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

Delaware  Licking  Morrow
Fairfield  Logan  Pickaway
Franklin  Madison  Union
Knox  Marion
The One Columbus mission is to lead a comprehensive regional growth strategy that develops and attracts the world’s most competitive companies, grows a highly adaptive workforce, prepares our communities for the future, and inspires corporate, academic and public innovation throughout the 11-county Columbus Region.
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THE BEGINNING

The Columbus 2020 Story Started With You
As summer turned to fall in 2007, Central Ohio was in the midst of a decade of stagnant job growth, diminishing per capita income figures and an undistinguished economic development profile. Columbus was considered just another metro area succumbing to the headwinds of the decline of the Midwest. In December of that year, the housing crisis and the global recession hit, washing away any gains that had been made in that decade.

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

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

The journey of the next decade included transformational project announcements, notable entrepreneurial achievements and the greatest expansion of the Columbus Region economy in its history. A decade later, the Columbus Region has...
not only achieved the job, investment and income goals it set, but has also earned distinction as a metro area with boundless ambition and economic potential.

For those reasons and more, we can and should celebrate, but we cannot pause. 2020 is a mile marker, not a destination. So, we redouble our efforts and attack the next 10 years with the same enthusiasm and ambition that fueled our work in 2010.
The Columbus Region has emerged as a beacon of economic competitiveness and population growth equal to any in the country. As this decade ends, the Columbus Region is surging beyond its goals, and is considered a national model of economic development success and collaboration. With each company expansion, each investment announcement from a new company and each company formed in the Region, our communities prosper and our lives are changed for the better.

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

- **created over** 150,000 net new jobs
- **secured over** $8 billion in capital investment
- **sparked a** 30% increase in per capita income

- **No. of Projects:** 500+
- **Total Payroll:** $2.0B
- **Capital Investment:** $8.5B

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

**FORBES**

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

**INC.**
$23.8 BILLION economic impact

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

PABLO VEGAS, Chairman of the Board of Directors, Columbus 2020
THE PROCESS
Your Input Defined the Path Forward
The past year has included hundreds of meetings, conversations and forums to discuss the future of our region. What are we anxious about? What is our new ambition? What does the future hold for this great region? Business leaders, public officials and civic advocates were engaged to discuss these concerns and what success looks like for the 11-county Columbus Region.

**WE LISTENED**

**LEADERSHIP ASSESSMENT**

**Spring 2018**

- 60 business leaders
- From 45 organizations
- Representing 22 industry sectors

**STAKEHOLDER & CIVIC GROUP DISCUSSIONS**

**Summer 2018**

- We met with 200+ business & civic leaders and board members
- Representing 50+ local economic development partners

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

**COMPARATIVE RESEARCH**

As we build upon the successes achieved during the past decade, Avalanche Consulting, a national economic development consultancy, identified six areas critical to the economic vibrancy of a region — **connectivity, productivity, prosperity, innovation, talent and inclusivity.** While an economically vibrant region may not rate especially high in each and every measure, rare is the region that can succeed in the face of consistently poor performance across any one element. To succeed going forward, we must focus on these areas.
Consistent themes emerged from the stakeholder meetings and research. It became clear that in order to achieve a new ambition and meet both existing and emerging challenges, Columbus Region communities, leadership and institutions will need to focus on four imperatives to achieve success.

1. WE MUST
Sustain Our Economic Momentum
by continuing to make economic growth and prosperity a top priority.

2. WE MUST
Develop, Inspire and Attract a Talented, Adaptive and Diverse Workforce
to compete for investment.

3. WE MUST
Enable the Innovation Capacity
of business, academic and government sectors
to grow dynamically.

4. WE MUST
Increase Global Identity and Connectivity
to attract investment and talent from around the world.
SUSTAIN OUR ECONOMIC MOMENTUM

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

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

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

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

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

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

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

THROUGHOUT THE MIDWEST
#1 Millennial Migration
Brookings Institution
DEVELOP, INSPIRE AND ATTRACT A TALENTED, ADAPTIVE AND DIVERSE WORKFORCE
to compete for investment.

The Columbus Region is younger and more educated than the national average, leading Ohio and the Midwest in both population and millennial growth. We boast one of the highest concentrations of higher education institutions and an in-demand, tech savvy workforce. **The challenge:** There are stubborn disconnects between demographics and outcomes, and we must work to eliminate these disparities. There is an insatiable appetite for skilled workers, and we must meet the challenges presented by automation. It will be necessary to become far more diverse, engaging across rural and urban areas and minority communities, while also attracting talent from across the world.

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

- #1 city for college graduates
  *SmartAsset*
- 35.9% of the population 25+ holds a bachelor’s degree or higher
- #12 in the United States and #1 in the Midwest for net migration of ages 25-34
ENABLE THE INNOVATION CAPACITY
of business, academic and government sectors to grow dynamically.

The Columbus Region is home to 15 Fortune 1000 companies, billion-dollar startups, and a strong education ecosystem. Corporate, academic, government, medical centers and R&D operations in our region are at the forefront of research and innovation. Research expenditures at The Ohio State University totaled more than $850 million in 2017, ranking it among the top 25 universities in the United States.

**The challenge:** As technology advances and automation increases, threats to the existing ecosystem have emerged. Fortune 1000 companies in the Region must adapt as innovative competitors become a threat. The higher education system is being challenged to not only deliver a talented workforce, but also comprehensive research. Government entities are undergoing a massive shift in technologies to serve citizens and to achieve status as smart cities.

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

- #1 city for tech workers
- Home to the Transportation Research Center, the largest independent proving grounds in the Americas
- $484.68 million of venture capital invested in Columbus in 2018 across 61 companies
INCREASE GLOBAL IDENTITY AND CONNECTIVITY to attract investment and talent from around the world.

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

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

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

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

300+ foreign-owned organizations, including 115 Japanese businesses

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

Columbus has been recognized as the standard-bearer for collaborative visual identity
THE VISION
We Will Boldly Pursue a Shared Ambition
We emerged from the last decade in a new, better place, but those changes did not happen in a vacuum. The world changed around us, and the economic development landscape is far different and far more competitive than 10 years ago.

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

**PROSPERITY DEFINED:**

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

PROSPERITY

INNOVATION
Economic and infrastructure gains:

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

Health, wealth and education gains:

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

Tech, innovation and investment gains:

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

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

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

- **60k jobs**
  We will secure 60,000 jobs in the Columbus Region.
  Full-time jobs with benefits remain a powerful way to change lives and build sustainable communities.

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

- **$10 billion investment**
  We will attract $10 billion of capital investment to the Columbus Region from our economic base projects.
FOUNDATIONAL STRATEGIES

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

Serve Existing Businesses

To create the most competitive economic base in the United States

Attract New Businesses

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

Support Entrepreneurship And Accelerate High-Growth Firms

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

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

Prepare Communities For The Future

Increase Global Trade And Investment

Market And Promote The Columbus Region Globally

Objective

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

Objective

To lead our peer regions in foreign investment and export growth

Objective

To become known as the most prosperous economy in the United States
To increase employment and overall payroll in each economic sector over the next decade, we will focus on these key industries.

**Objective**

**Retail Brands & Technologies**
To maintain our role as a retail headquarters, services and technology leader.

**E-Commerce**
To increase our position as a leading logistics location by building global capabilities and diversifying our employment and facilities profile.

**Finance & Insurance**
To increase our aggregate wages and diversify our finance and insurance industries.
Objective
To diversify our portfolio of automotive and mobility suppliers and increase research and development services

Objective
To build a sustainable bio-medical and health services industry

Objective
To become one of the most significant advanced computing centers in the United States
We will continue to aggressively pursue economic growth across the Region and focus on diversifying our economy while increasing and expanding our international relationships.

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

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

We will succeed if we work together.

WE ARE ONE COLUMBUS.
THANK YOU
TO OUR PARTNERS, LEADERS AND INVESTORS

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Matthew Bailey, Squire Patton Boggs
Kennedy McDonald, CEcD, One Columbus
Sean Grant, One Columbus

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

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

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

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

Leadership Circle
Alliance Data Systems, Inc.
American Electric Power Company, Inc.
AT&T Ohio
Bank of America, National Association
Battelle Memorial Institute
Big Lots, Inc.
Bricker & Eckler LLP
Cardinal Health, Inc.
CBRE
Champion Companies
Chemical Abstracts Service
Columbia Gas of Ohio, Inc.
Leadership Circle (cont.)
Nationwide Children's Hospital
Nationwide Mutual Insurance Company
OhioHealth
PNC Bank
Porter Wright Morris & Arthur LLP
Ruscilli Construction Co., Inc.
SOLUTIONS Staffing
Squire Patton Boggs (US) LLP
The Scots Miracle-Gro Company LLC
The Columbus Foundation
The Ohio State University
The Ohio State University Wexner Medical Center
Turner Construction Company
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VERTIV
Vorys, Sater, Seymour and Pease LLP
Worthington Industries, Inc.

Investors
3 Pillar Homes, LLC
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AC Hotel Dublin
Adena Corporation
Advanced Civil Design, Inc.
Advanced Drainage Systems, Inc.
AECOM
Alterra Real Estate Advisors
American Structurepoint Inc.
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Anderson Concrete Corporation
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BakerHostetler LLP
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BDQ USA LLP
BMO Harris Bank
Brexton LLC
Buckeye Power, Inc.
Bruner Corporation
Builders Exchange of Central Ohio
Building Industry Association of Central Ohio
Burgess & Niple, Inc.
Burns McDonnell
Byers, Minton & Associates, Inc.
Cafelle, Halter & Griswold LLP
Cameron Mitchell Restaurants
Capital University
Carlisle Patchen & Murphy LLP
Casto
Central Ohio Technical College
Centric Consulting
Champion City Media
Chemcote Roofing Company
Chemcote, Inc.
Clark, Schaefer, Hackett & Co.
Clear Channel
ClearPath Benefit Advisors LLC
Coldwell Banker King Thompson
Colliers International
Columbus Airport Marriott
Columbus Business First
Columbus Building Trades Council
Columbus Coach, Ltd.
Columbus Coal & Lime Company
Columbus College of Art & Design
Columbus Zoo & Aquarium
Compass Homes, Inc.
Construction One
Crabbe, Brown & James LLP
Crane Group Co.
Crawford Hoying
CTL Engineering, Inc.
Cushman & Wakefield
Danis Building Construction Company
Dave Gill Chevrolet
Dayton Power & Light
Delaware Area Chamber of Commerce
Denier Electric Co., Inc.
Denison University
DesignGroup
DHL Express (USA), Inc.
Dickinson Wright PLLC
DLZ Corporation
Donatos Pizzeria, LLC
DRK and Company
Dublin Building Systems
Dulan & Meyers
Duffer Office
EclipseCorp, LLC
EDGE
Elford, Inc.
EMH&T
Express Employment Professionals
EXCEL Project Management, LLC
Ferguson Construction Company
First Commonwealth Bank
First Financial Bank
First Merchants Bank
FirstEnergy Corp.
Franklin University
Frost Brown Todd LLC
FST Logistics
G & J Pepsi-Cola Bottlers, Inc.
GBQ Partners LLC
George J. Igel & Co., Inc.
Geotechnical Consultants Inc.
Germain Motor Company
Gilbane Building Company
Hahn Loeser & Parks LLP
Hamilton Capital Management, Inc.
Hamilton Parker Company, LLC
Haughn & Associates
Heartland Bank
Heath-Newark-Licking County Port Authority
Heidelberger Distributing Company
Hilton Columbus Downtown
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Hobbrook & Manter
Homewood Homes, Inc.
Humble Construction Co.
Hyatt Regency
Indus Hotels
Information Control Company LLC
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JDS Companies
Jeni's Splendid Ice Cream
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Jim Frey Real Estate Advisor
John Gerlach & Company
Jones Lang LaSalle Incorporated
Kabil Associates, Inc.
Kaufman Development
Kegler, Brown, Hill & Ritter Co., LPA
KEMBA Financial Credit Union, Inc.
Key College
KeyBank
Kimball Midwest
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KLH Engineers
Kohr Royer Griffith, Inc.
Kohrman Jackson & Krantz
KPMG LLP
LeadingEDGE
Lefftech
Lehman Daman Construction Services, Inc.
Lifestyle Communities
Limbach
Lindsay Honda/Acura
LIVE! Technologies
Loeb Electric and Loeb Lighting Services
LOT, Inc.
M&A Architects
Matrix PDM Engineering, Inc.
McGohan Brabender LLC
Mead & Hunt
Medical Mutual of Ohio
Mid-City Electric
Miles McClean Construction Company
Mills James
Mindstream Interactive
Montrose Group
Morgan Stanley & Co. LLC
ms consultants
NAI Ohio Equity
Navigator Management Partners, LLC
NBBJ, LLC
NCT Ventures
Norfolk Southern Corporation
ODW Logistics, Inc.
Ohio Dominican University
Ohio University
Ohio Wesleyan University
Oswald Companies
Otterbein University
Overmyer Hall Associates
Park National Bank
Paul J. Ford & Company
PDCO E&A Services
Peoples Bank
Perez & Morris LLC
Pillar Technology Group, LLC
Plante Moran
POLARIS Centers of Commerce
Portfolio Creative
Power Connect
Prater Engineering Associates, Inc.
Preferred Living
ProLogis
Pulte Group, Inc.
RED Capital Markets, LLC
Redwood Acquisitions
Renaissance Columbus Downtown Resource Development Group
RevLocal, Inc.
Robin Enterprises Company
Rockford Homes
Roettel & Andress, LPA
Ryan’s Landscaping
Rumpke
S&amp;M Satellite Group, Inc.
Sands Decke CPS, LLC
Schneider Downs & Co., Inc.
Shumaker, Loop & Kendrick, LLP
Sinclair Broadcast Group
Solid Waste Authority of Central Ohio Solutions Staffing
Sophisticated Systems, Inc.
Spectrum
State Auto Insurance Companies
State Farm Insurance Company
Steiner & Associates
Stewart Title Company
Stonehenge Partners, Inc.
Suburban Steel Supply Company LLC
Superior Beverage Group
Taft Stettinius & Hollister, LLP
Tanaka & Company
Team Fishel Surveying and Engineering
Telhio Credit Union
Terracon
The Daimler Group, Inc.
The Energy Cooperative
The Kleingers Group, Inc.
The Kroger Co.
The Memorial Tournament
The New Albany Company
The Painting Company
The Pizzuti Companies
The Refectory Restaurant & Bistro
The Robert Weiler Company
The Superior Group
The Whiting-Turner Contracting Company
thinkKSC
Thomas & Marker Construction
Trillium Staffing
Valley Interior Systems
VanTrust Real Estate LLC
Vermont Energy Investment Corporation
Vertiv Corporation
Village Communities
Vista Industrial Packaging
Voya
Wagenbrenner Development
Wells Fargo Bank
Whiting-Turner Contracting
Wolfe Enterprises
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As of August 2019