

About

Liaison Design Group

- Founded in 2000
- Based in Raleigh, NC
- 50+ economic development clients

Liaison

DESIGN GROUP

Project

Marketing Chapel Hill

Promote Chapel Hill as a great place for business

- Phase One: Research the community and competition
- Phase Two: Creative concepting/messaging
- Phase Three: Spread the word

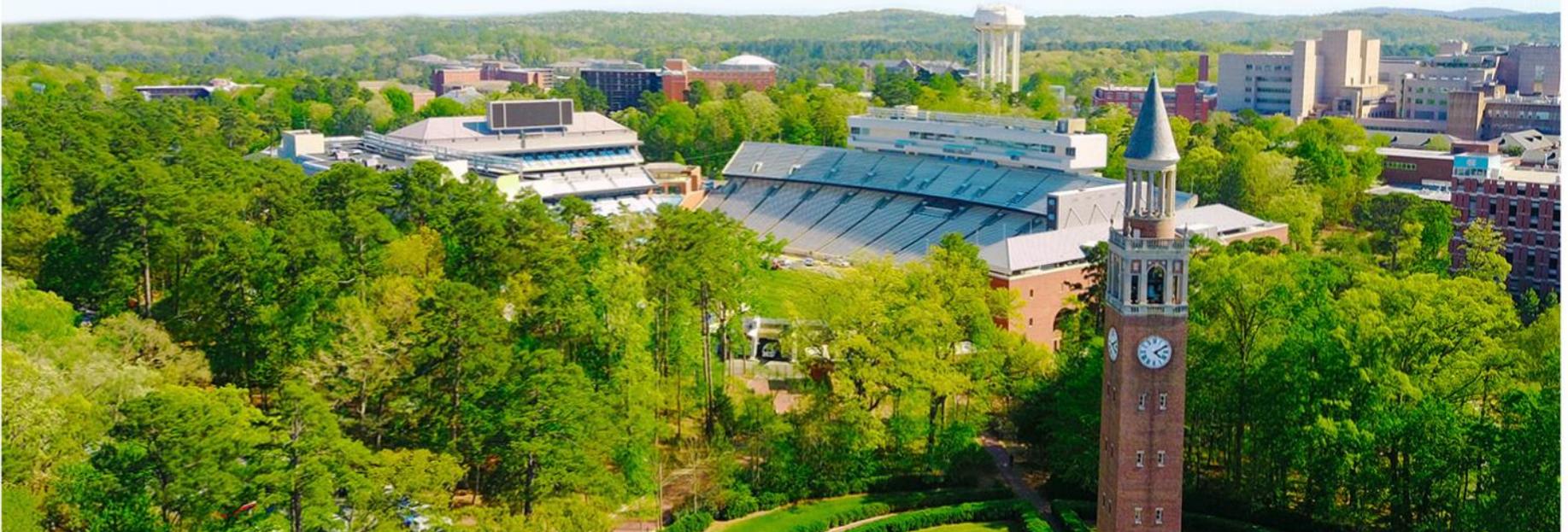
Liaison

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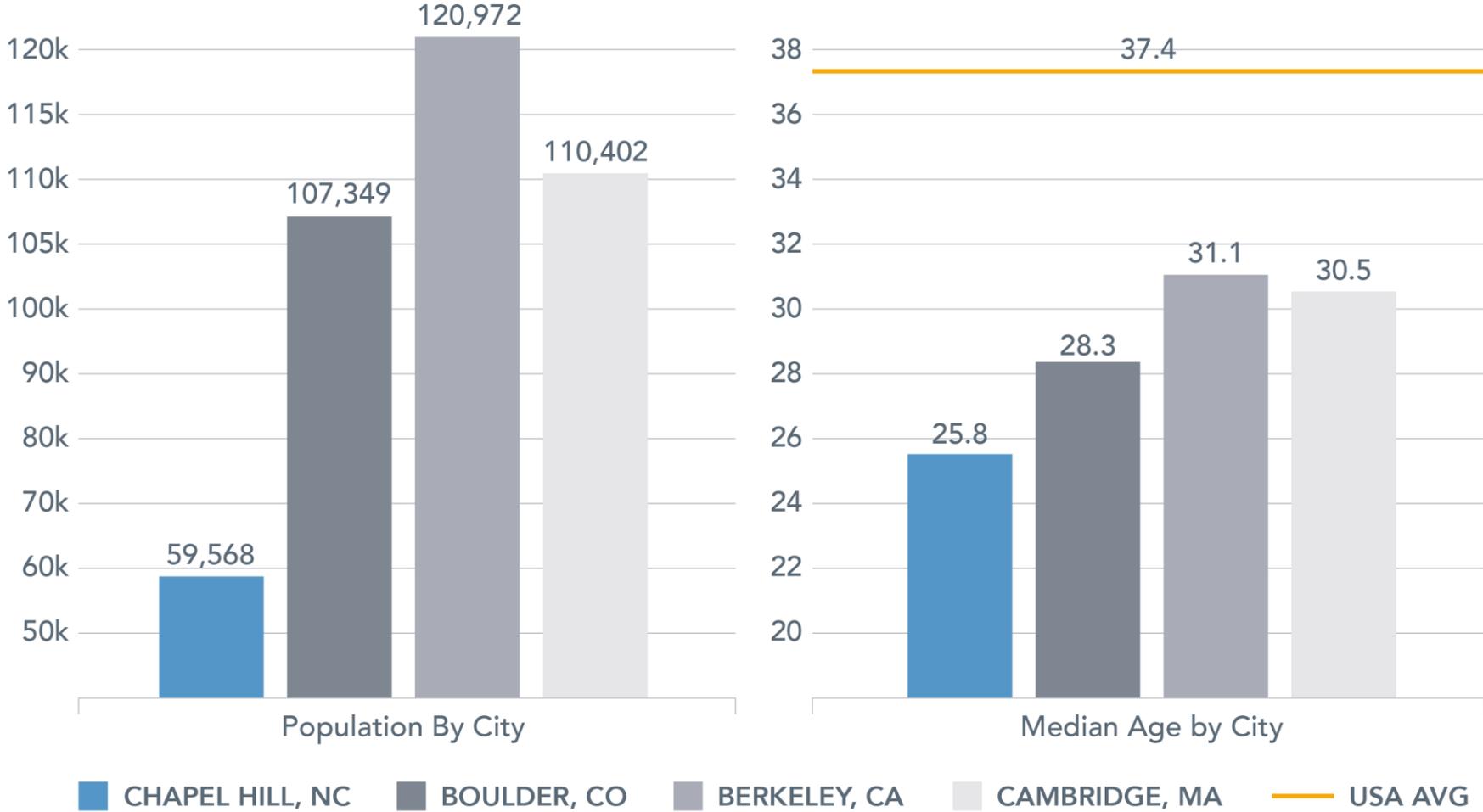
Initial Findings

Town of Chapel Hill, NC

Chapel Hill's reputation is that of a terrific university town, but it's also a great place to live, work, and grow a business. The following slides compare the Town of Chapel Hill with three other fundamentally similar communities —Boulder, CO; Cambridge, MA; and Berkeley, CA.



Population Overview

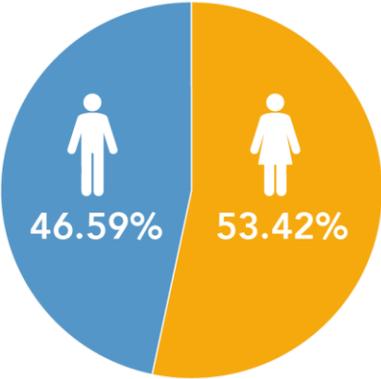


Source: BestPlaces.net, City Comparison – Last Updated 12/16.

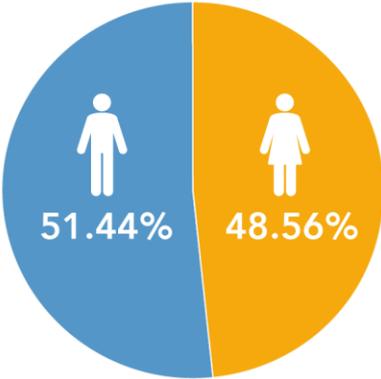
Population Growth Rate

	2000	2015	Percentage Growth	Total Growth
Chapel Hill, NC	48,715	58,766	20.60%	10,051
Boulder, CO	94,673	103,919	9.76%	9,246
Berkeley, CA	102,743	117,384	14.25%	14,641
Cambridge, MA	101,355	107,916	6.47%	6,561

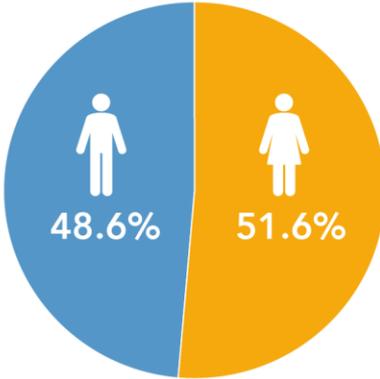
Population By Gender



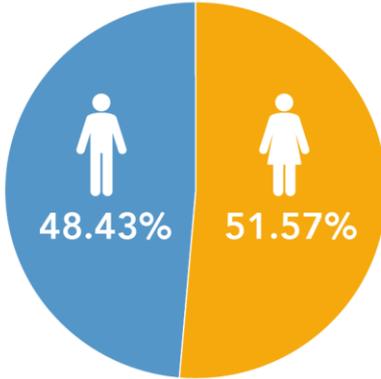
CHAPEL HILL, NC



BOULDER, CO



BERKELEY, CA

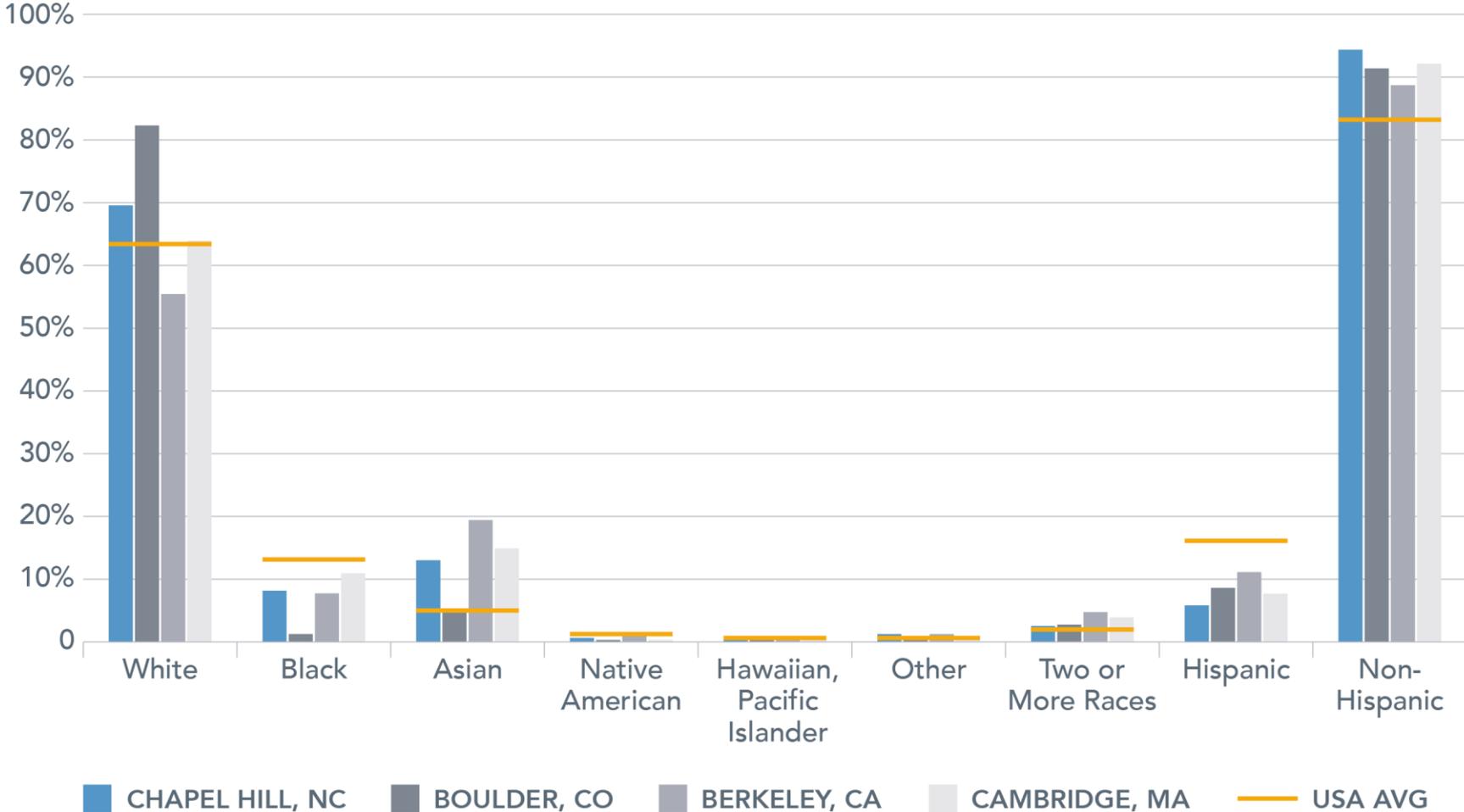


CAMBRIDGE, MA

■ Male Population ■ Female Population

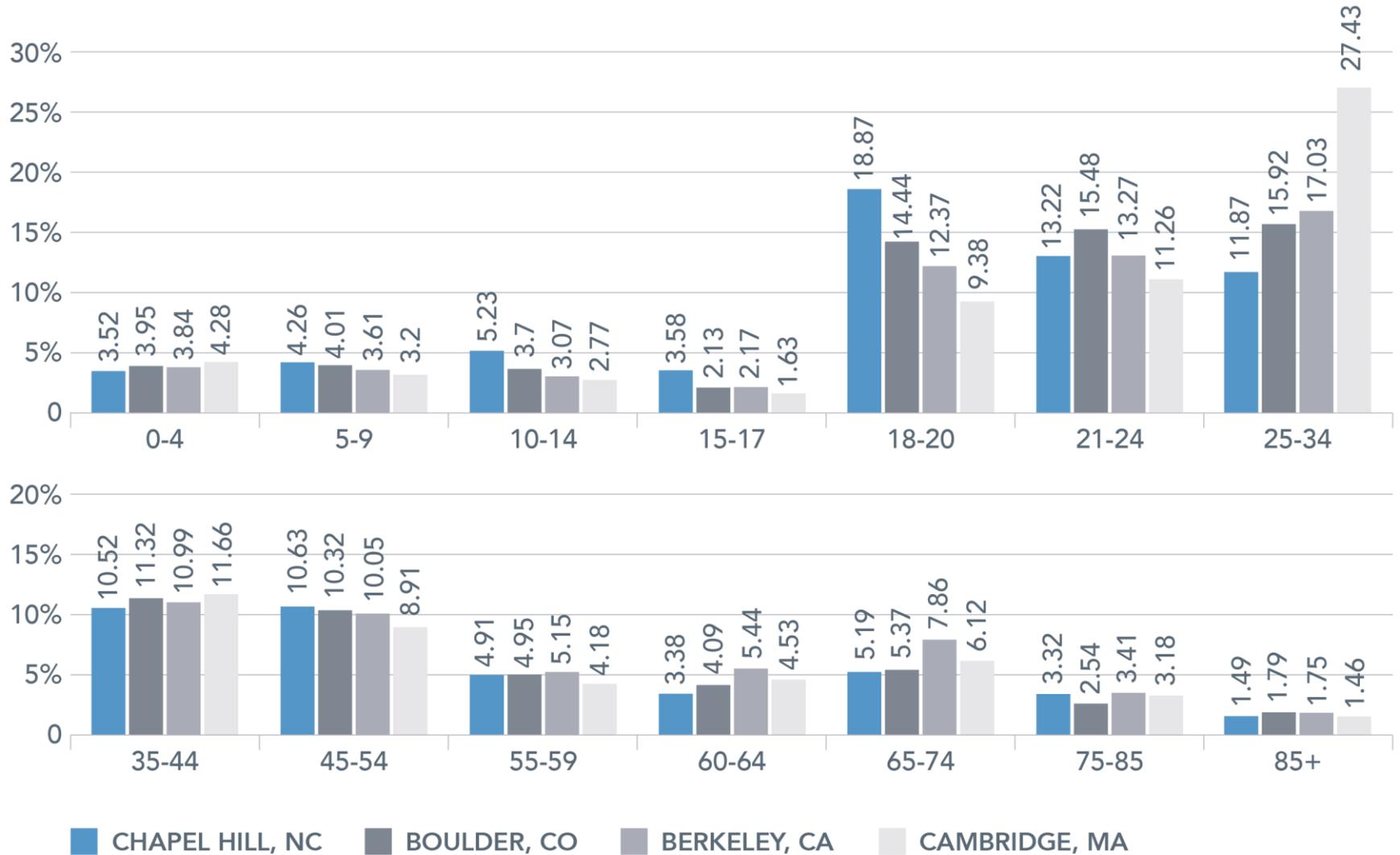
Source: BestPlaces.net, City Comparison – Last Updated 12/16.

Population By Race



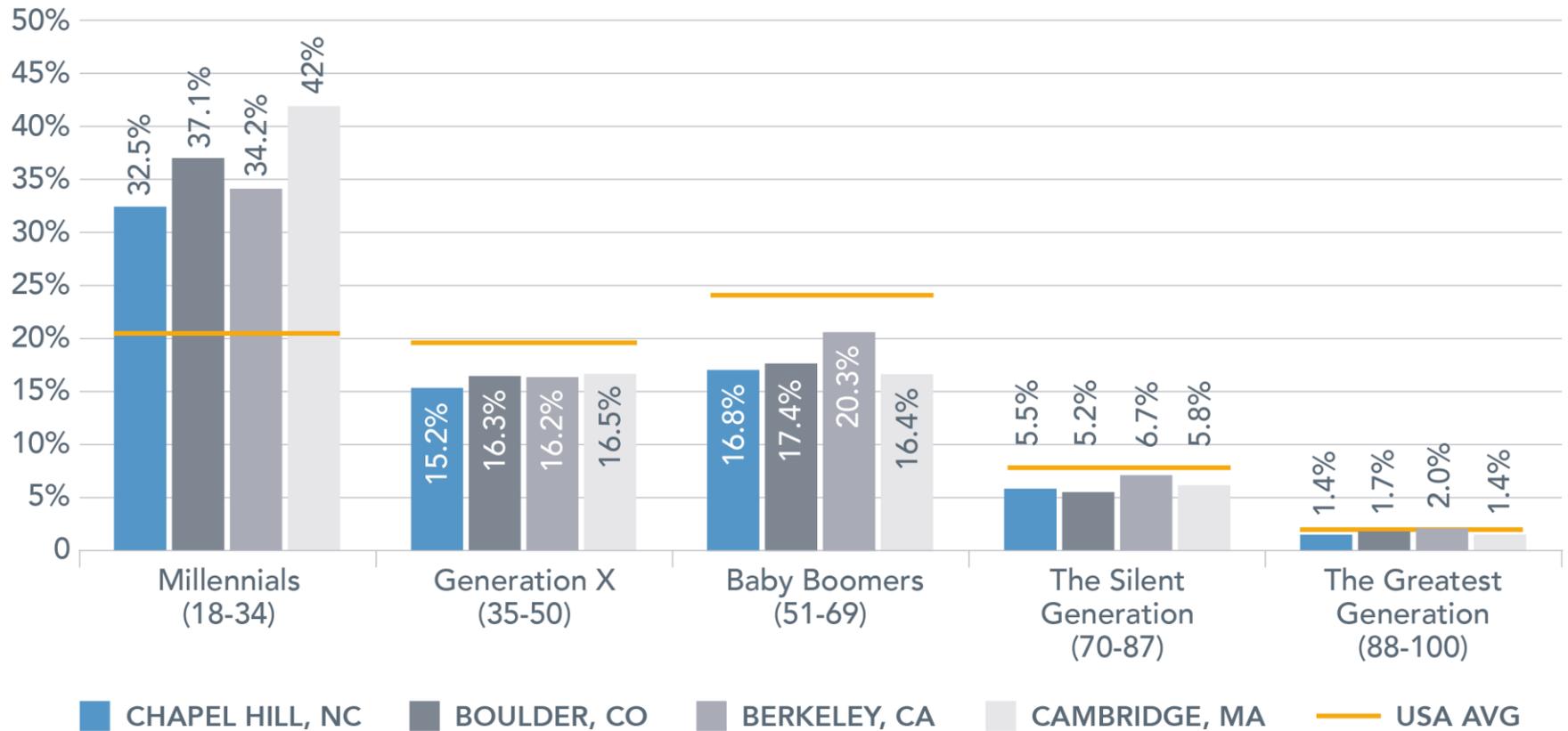
Source: BestPlaces.net, City Comparison – Last Updated 12/16.

Total Population By Age (%)



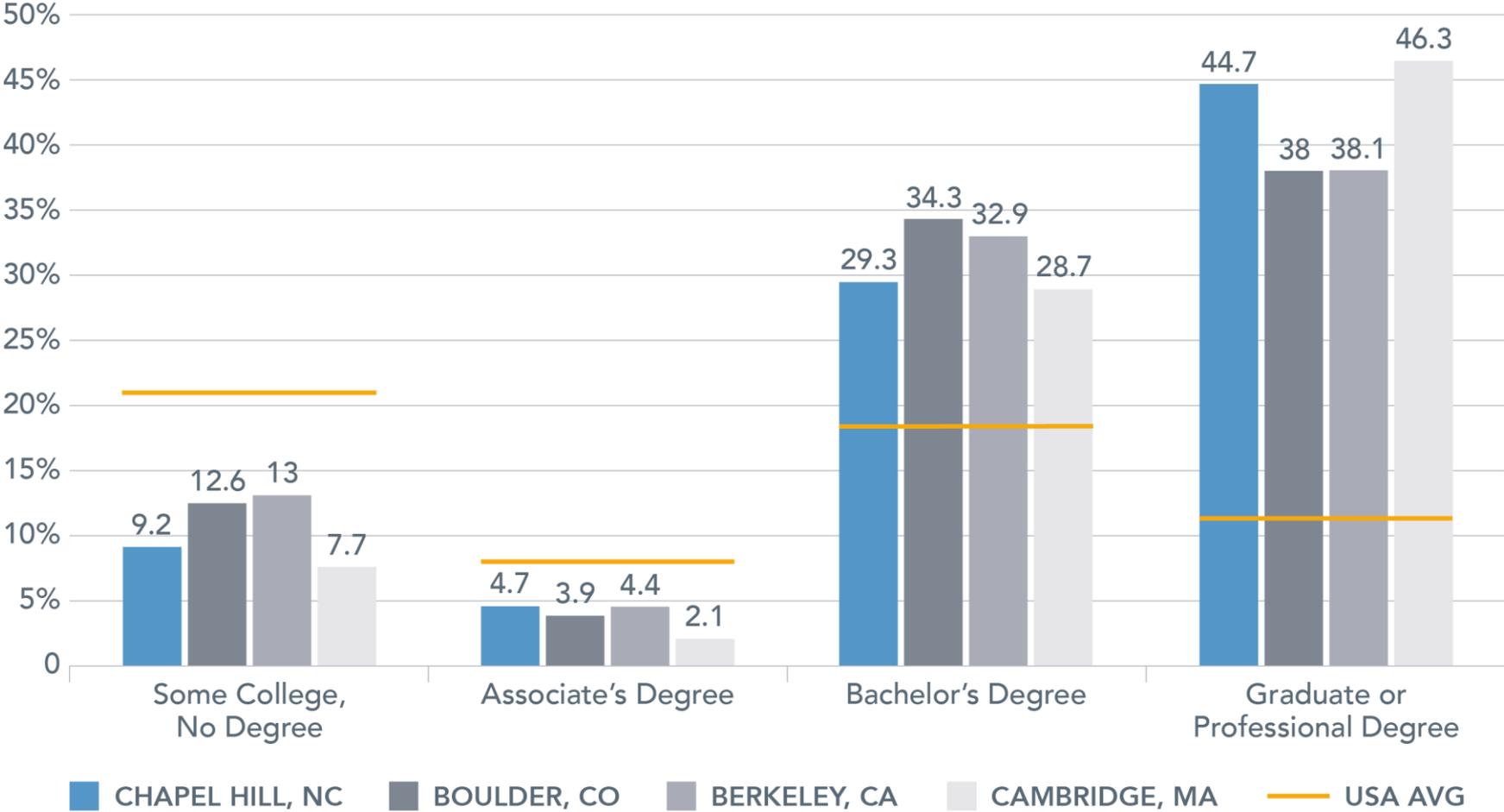
Source: BestPlaces.net, City Comparison – Last Updated 12/16.

Total Population By Generations (%)



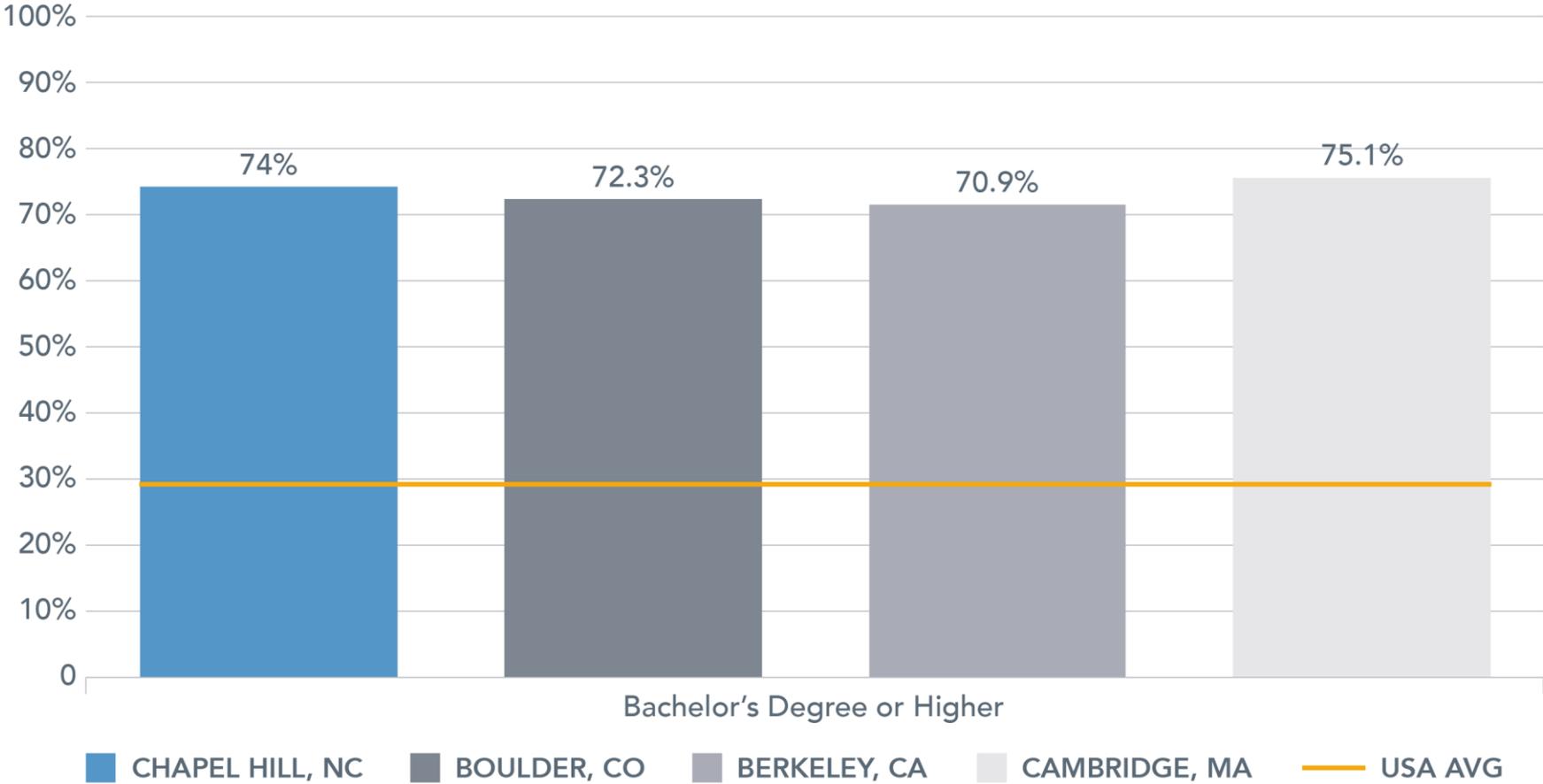
Source: U.S. Census Bureau, 2011-2015 American Community Survey 5-Year Estimates. For generation year ranges, Millennials (18-34 years old), Generation X (35-50), Baby Boom Generation (51-69), Silent Generation (70-87), Greatest Generation (88-100) – www.pewresearch.org/facttank/2015/05/11/millennials-surpass-gen-xers-as-the-largest-generation-in-u-s-labor-force/ft_15-05-11_millennialsdefined/

Highest Degree Awarded, Age 25 and Over



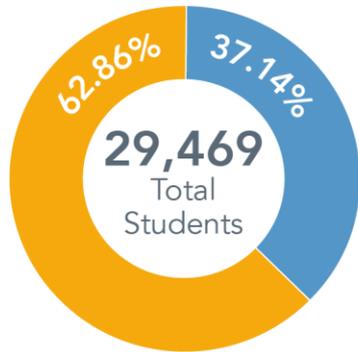
Source: U.S. Census Bureau, 2011-2015 American Community Survey 5-Year Estimates.

Bachelor's Degree and Higher, Age 25 and Over

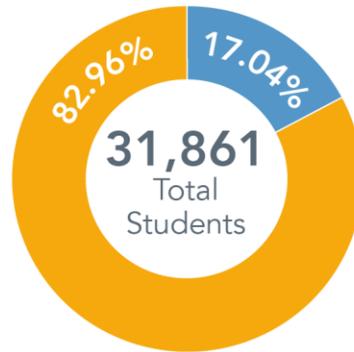


Source: U.S. Census Bureau, 2011-2015 American Community Survey 5-Year Estimates.

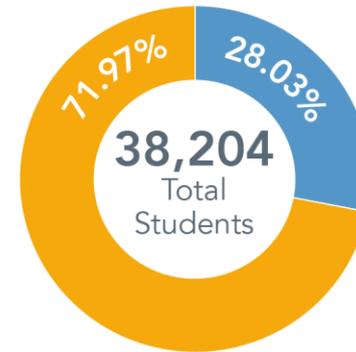
Total Enrolled Students



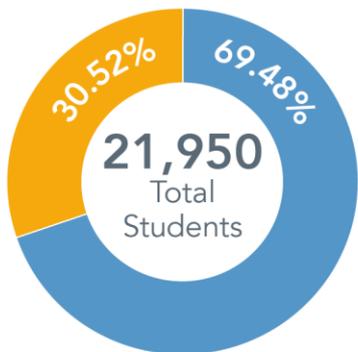
UNIVERSITY OF NORTH CAROLINA-CHAPEL HILL



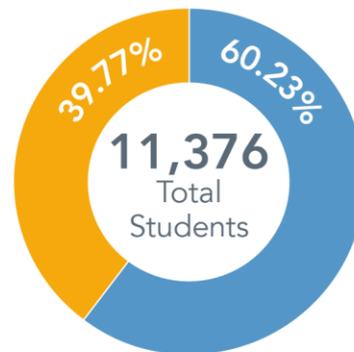
UNIVERSITY OF COLORADO-Boulder



UNIVERSITY OF CALIFORNIA-BERKELEY



HARVARD UNIVERSITY

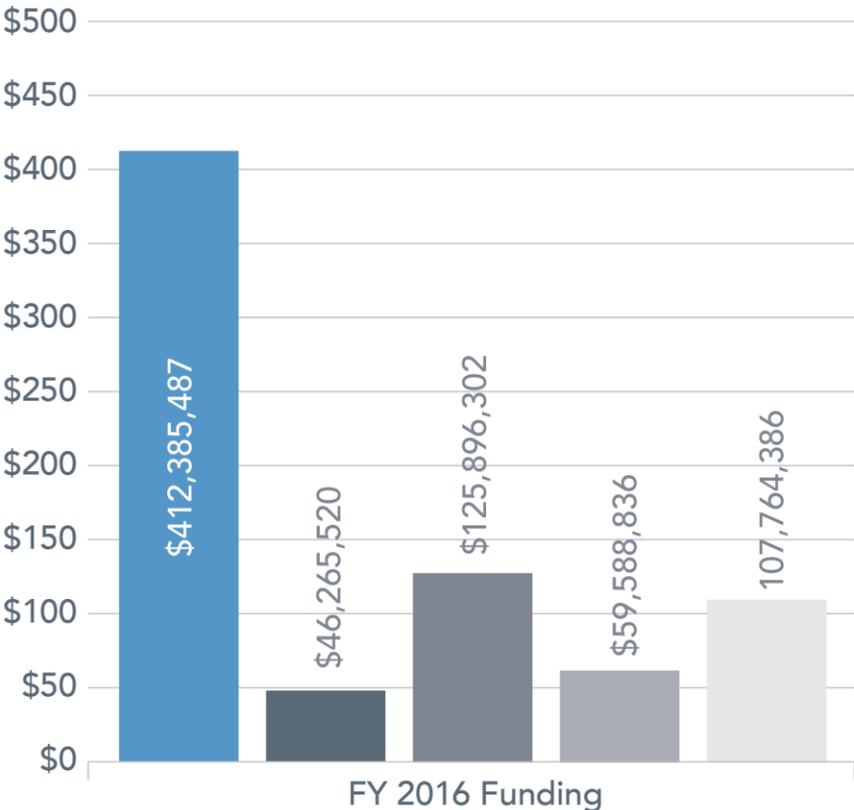
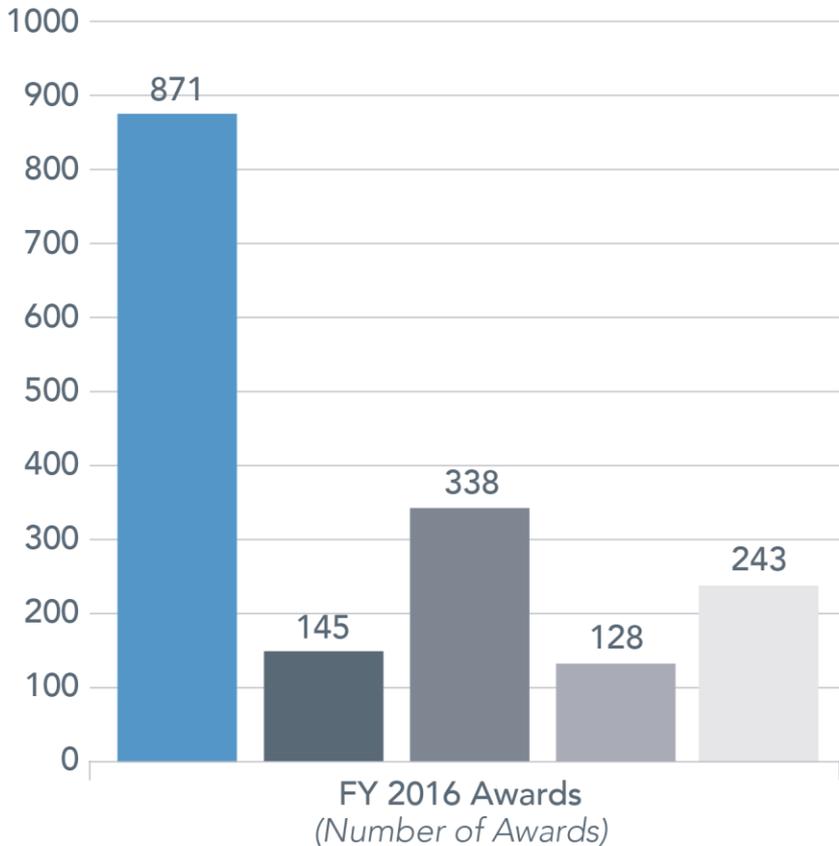


MASSACHUSETTS INSTITUTE OF TECHNOLOGY



Sources for Total Enrolled Students and Student:Faculty Ratio: University of North Carolina – Chapel Hill: <http://uncnews.unc.edu/facts-about-carolina/facts-figures/>, <https://admissions.unc.edu/files/2015/02/Undergraduate-Financial-Certificate-2017-2018-003.pdf>. University of Colorado – Boulder: <http://www.colorado.edu/oda/>, <http://www.colorado.edu/about>. University of California – Berkeley: <http://opa.berkeley.edu/campus-statistics>. Harvard University: <http://www.harvard.edu/about-harvard/harvard-glance>, http://fdo.fas.harvard.edu/files/fdo/files/consider_harvard.pdf. Massachusetts Institute of Technology: <http://web.mit.edu/facts/faqs.html>.

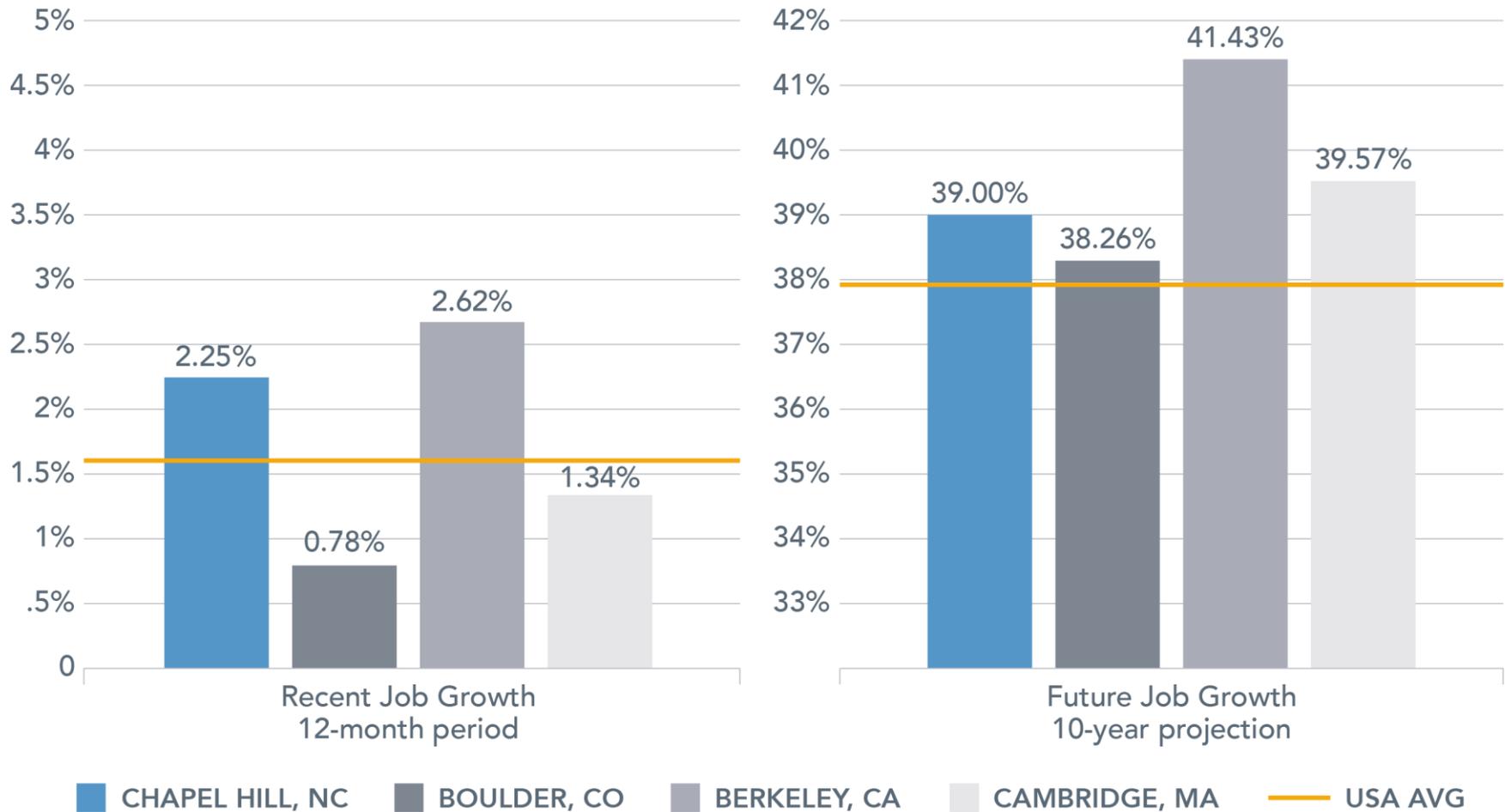
National Institutes of Health Awards & Funding



- UNIVERSITY OF NORTH CAROLINA, CHAPEL HILL
- UNIVERSITY OF COLORADO, BOULDER
- UNIVERSITY OF CALIFORNIA, BERKELEY
- HARVARD UNIVERSITY
- MASSACHUSETTS INSTITUTE OF TECHNOLOGY

Source: National Institutes of Health, www.report.nih.gov/award/index.cfm.

Job Growth Comparisons



Income Comparisons

	Household Income	Family Median Income	Income Taxes (2016)
Chapel Hill, NC	\$62,620	\$112,977	5.75%
Boulder, CO	\$58,062	\$102,623	4.63%
Berkeley, CA	\$65,283	\$114,720	8.00%
Cambridge, MA	\$75,909	\$99,380	5.10%
USA	\$53,482	\$65,443	4.60%

Household Income is the median income of all households in a given geographic area. A household consists of all people who occupy a housing unit regardless of relationship. A household may consist of a person living alone or multiple unrelated individuals or families living together. The Family Median Income in a given geographic area. A family consists of two or more people (one of whom is the householder) related by birth, marriage, or adoption residing in the same housing unit. The median is the middle value when all are arranged from highest to lowest.

Top 50 Best Cities for Entrepreneurs

#3

CHAPEL HILL, NC



#4

BOULDER, CO



#20

CAMBRIDGE, MA



#22

BERKELEY, CA

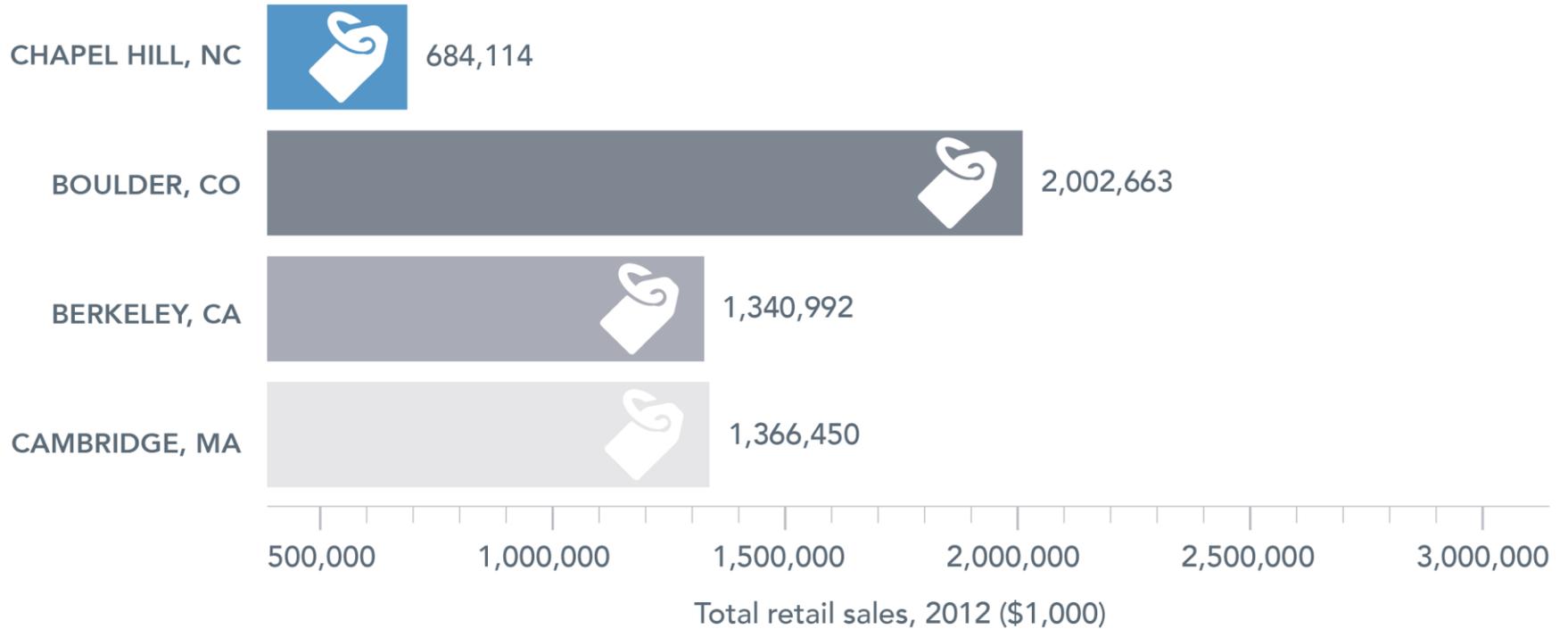


Cities were ranked based on these 15 data points from 2,000 small- to mid-sized cities. First, it had to be a good city to start a business – one that supports startups and has a community of similarly-driven people. Researchers looked for cities with high levels of SBA loans, creative class workers, broadband technology and transportation infrastructure to support new businesses. To grow the business you need talent, so researchers analyzed cities that had low levels of unemployment and economic inequality, diverse demographics and affordable housing. Areas with plenty to do at night with cultural and entertainment options scored well too. Finally, researchers added in a variety of quality-of-life indicators about crime, schools, health care and commute time. From there, editors selected the top 50 from that group to ensure a good mix of cities in terms of size and geography. The final Top 50 Best Cities for Entrepreneurs are therefore a collection of cities that are ideal crucibles for a new business venture to start and thrive and for entrepreneurs to settle in, put down some roots and maybe even grow a family.

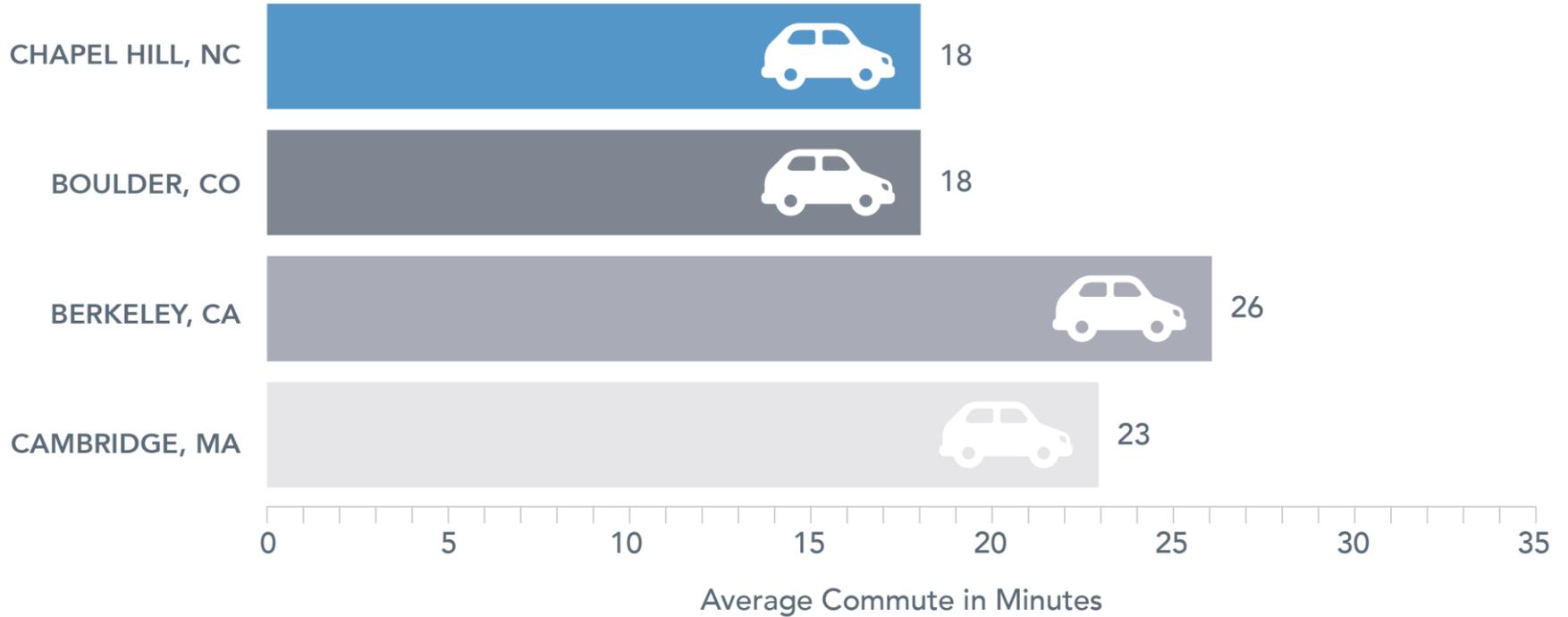
Total Labor Force

	Total Labor Force
Chapel Hill, NC	30,220
Boulder, CO	61,396
Berkeley, CA	64,080
Cambridge, MA	66,288

Total Retail Sales



Average Commute in Minutes



Total Employment By Major Industries

Major Industries	Chapel Hill, NC	Boulder, CO	Berkeley, CA	Cambridge, MA
Civilian employed population 16 years and over	28,499	57,393	58,831	62,998
Agriculture, forestry, fishing and hunting, and mining	70 (0.25%)	384 (0.67%)	192 (0.33%)	71 (0.11%)
Construction	638 (2.24%)	1,644 (2.86%)	1,565 (2.66%)	687 (1.09%)
Manufacturing	1,098 (3.85%)	3,555 (6.19%)	2,499 (4.25%)	3,576 (5.68%)
Wholesale trade	484 (1.7%)	853 (1.49%)	748 (1.27%)	702 (1.11%)
Retail trade	2,476 (8.69%)	5,808 (10.12%)	4,306 (7.32%)	3,300 (5.2%)
Transportation and warehousing, and utilities	235 (0.82%)	821 (1.43%)	972 (1.65%)	986 (1.57%)
Information	693 (2.43%)	1,836 (3.2%)	2,557 (4.35%)	2,182 (3.46%)
Finance and insurance, and real estate and rental and leasing	1,657 (5.81%)	2,562 (4.46%)	2,844 (4.83%)	3,876 (6.15%)
Professional, scientific, and management, and administrative and waste management services	3,636 (12.76%)	11,621 (20.25%)	11,831 (20.11%)	12,994 (20.63%)
Educational services, and health care and social assistance	12,971 (45.51%)	15,485 (26.98%)	21,415 (36.4%)	26,318 (41.78%)
Arts, entertainment, and recreation, and accommodation and food services	2,916 (10.23%)	8,182 (14.46%)	5,036 (8.56%)	3,988 (6.33%)
Other services, except public administration	1,020 (3.58%)	3,232 (5.63%)	2,944 (5%)	2,393 (3.8%)
Public administration	605 (2.12%)	1,410 (2.46%)	1,922 (3.27%)	1,925 (3.06%)



Source: U.S. Census Bureau, 2011-2015 American Community Survey 5-Year Estimates.

Average Wages Per Hour by MSA/MD

Major Industries	Chapel Hill, NC*	Boulder, CO*	Berkeley, CA*	Cambridge, MA*	
All Occupations	\$27.81	\$29.04	\$30.17	\$32.66	
Management	\$65.68	\$65.15	\$66.99	\$67.32	
Business and Financial Operations	\$36.14	\$39.09	\$43.01	\$42.04	
Computer and Mathematics	\$43.01	\$45.35	\$51.57	\$46.95	
Architecture and Engineering	\$39.28	\$46.71	\$47.11	\$44.66	(10%+)
Life, Physical & Social Science	\$38.48	\$41.46	\$43.77	\$38.38	
Community & Social Service	\$22.68	\$23.90	\$27.30	\$23.96	
Legal	\$47.20	\$47.61	\$56.92	\$63.16	
Education, Training & Library	\$37.37	\$30.21	\$28.77	\$33.74	10%+
Arts, Design, Entertainment, Sports & Media	\$27.31	\$27.90	\$27.17	\$33.03	
Healthcare Practitioners & Technical Occupations	\$34.91	\$41.19	\$50.15	\$47.34	(15%+)
Healthcare Support	\$13.31	\$17.42	\$19.23	\$17.34	(25%+)
Protective Service	\$19.12	\$24.63	\$31.18	\$26.67	(25%+)
Food Preparation & Serving	\$11.03	\$12.36	\$13.78	\$14.09	
Building & Grounds Cleaning, Maintenance	\$12.23	\$14.30	\$17.36	\$17.59	
Personal Care and Service	\$13.48	\$16.22	\$14.77	\$16.15	
Sales	\$20.09	\$25.00	\$22.74	\$25.92	
Office/Admin Support	\$18.34	\$19.10	\$21.49	\$22.05	
Farming, Fishing, & Forestry	\$14.61	\$13.93	\$16.02	\$16.75	
Construction/Extraction	\$19.18	\$22.02	\$31.21	\$32.25	
Installation, Maintenance & Repair	\$22.15	\$22.82	\$27.46	\$27.32	
Production	\$18.88	\$18.74	\$20.00	\$19.93	
Transportation & Material Moving	\$14.70	\$18.37	\$20.73	\$19.41	

Source: Bureau of Labor Statistics, <https://www.bls.gov/oes/current/oessrcma.htm>, May 2016. *Each town/city is part of an MSA (Metropolitan Statistical Area) or MD (Metropolitan Division). These estimates reflect the median hourly wages for those MSAs or MDs based on each major industry.

Median Homes Sales Price with Homes Owned or Rented



Median Home
Sales Price

CHAPEL HILL, NC



Median Home
Sales Price

BOULDER, CO



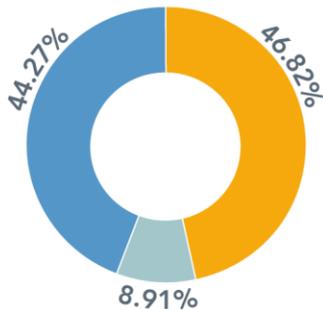
Median Home
Sales Price

BERKELEY, CA

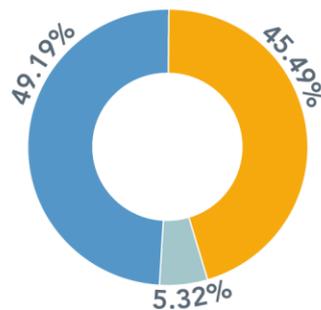


Median Home
Sales Price

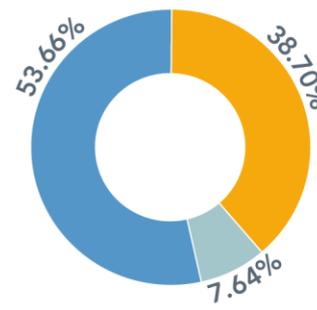
CAMBRIDGE, MA



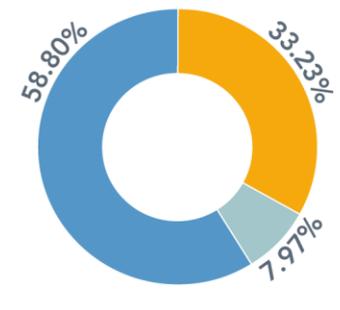
CHAPEL HILL, NC



BOULDER, CO



BERKELEY, CA



CAMBRIDGE, MA

■ % Homes Owned ■ % Homes Rented ■ % Unoccupied

Source: BestPlaces.net, City Comparison – Last Updated 12/16; Trulia.com (Median Home Sales Price)

Homes Owned: The percentage of housing units which are owned by the occupant. Homes Rented: The percentage of housing units which are rented by the occupant. A housing unit is a house, apartment, mobile home, or room occupied as separate living quarters. Median Home Cost: This is the value of the years most recent home sales data. Its important to note that this is not the average (or arithmetic mean). The median home price is the middle value when you arrange all the sales prices of homes from lowest to highest.

Median Monthly Rent



Median
Monthly Rent
CHAPEL HILL, NC



Median
Monthly Rent
BOULDER, CO

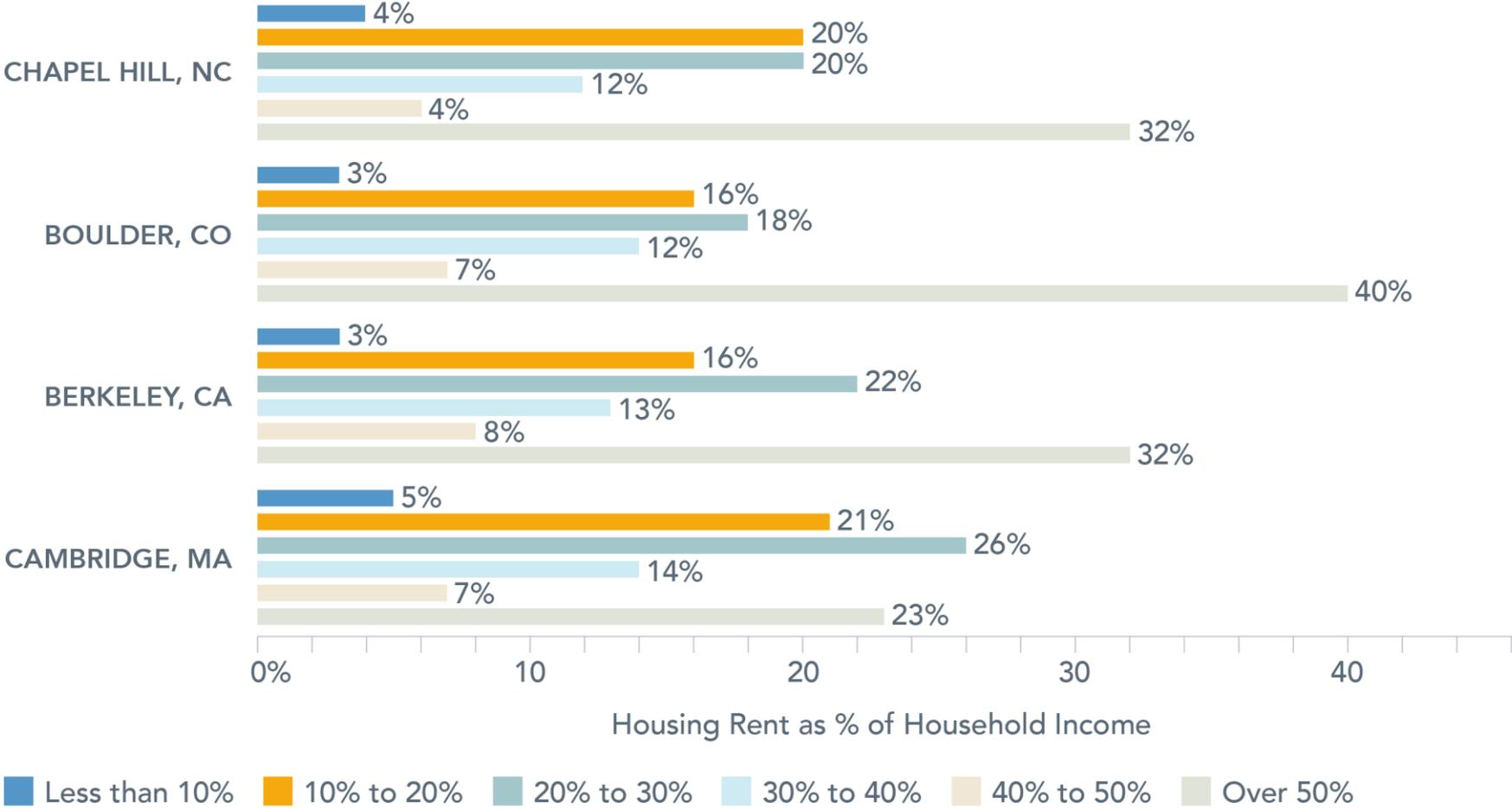


Median
Monthly Rent
BERKELEY, CA



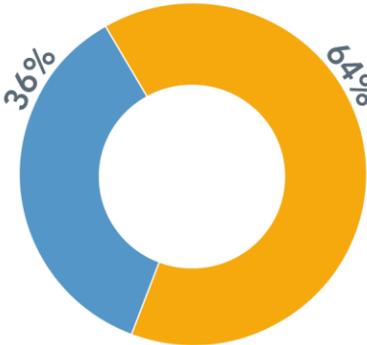
Median
Monthly Rent
CAMBRIDGE, MA

Rent as Percent of Household Income

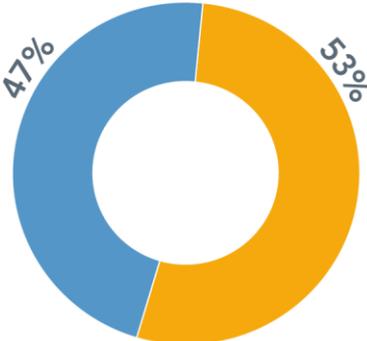


Source: Towncharts.com (2016 American Community Survey).

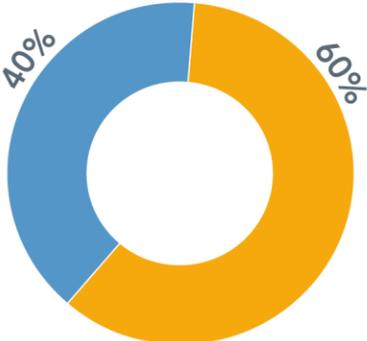
Rent as 40% or more of Household Income



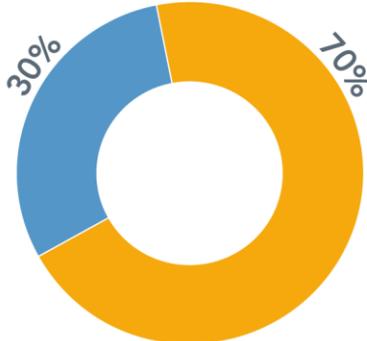
CHAPEL HILL, NC



BOULDER, CO



BERKELEY, CA

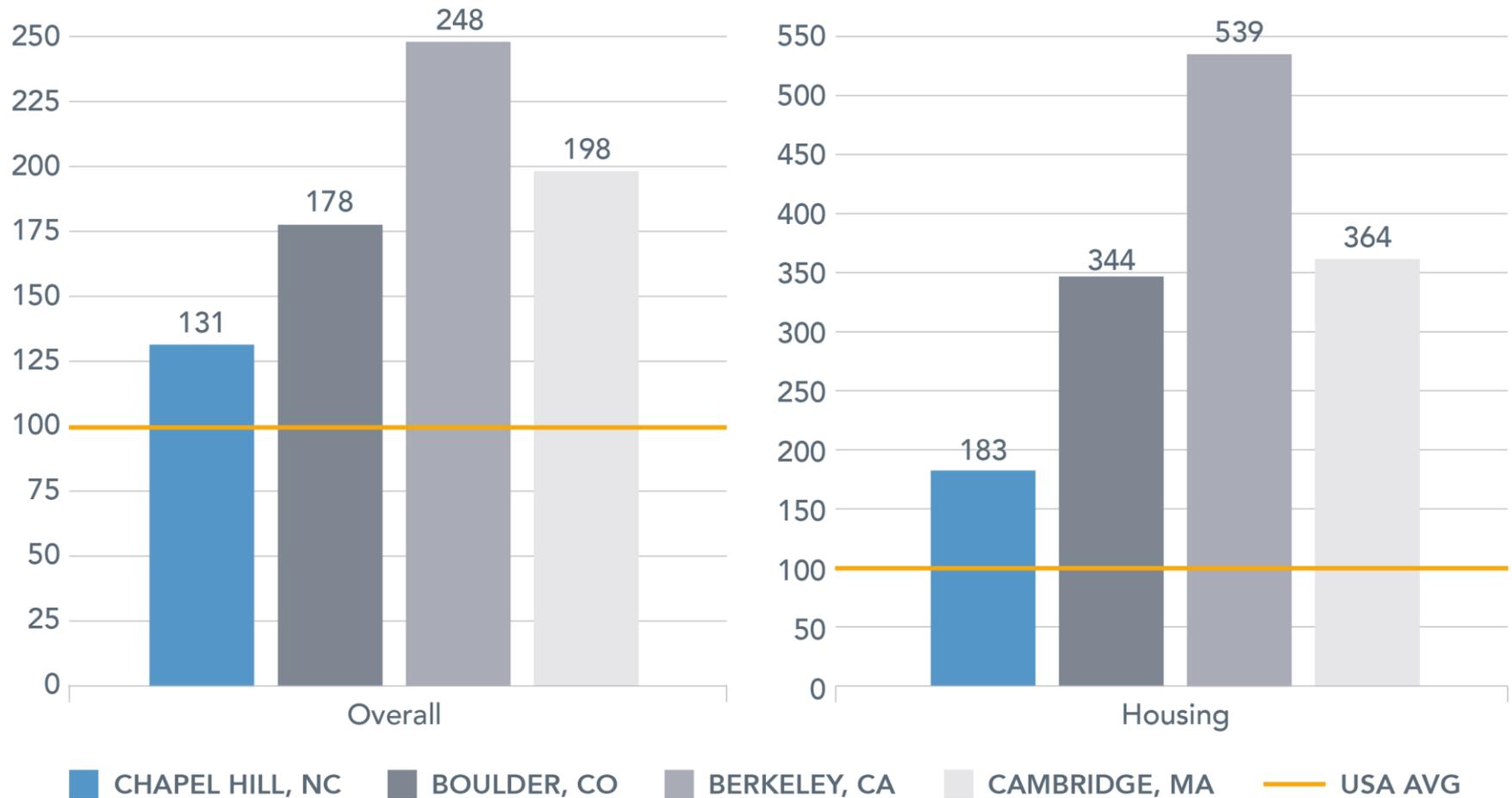


CAMBRIDGE, MA

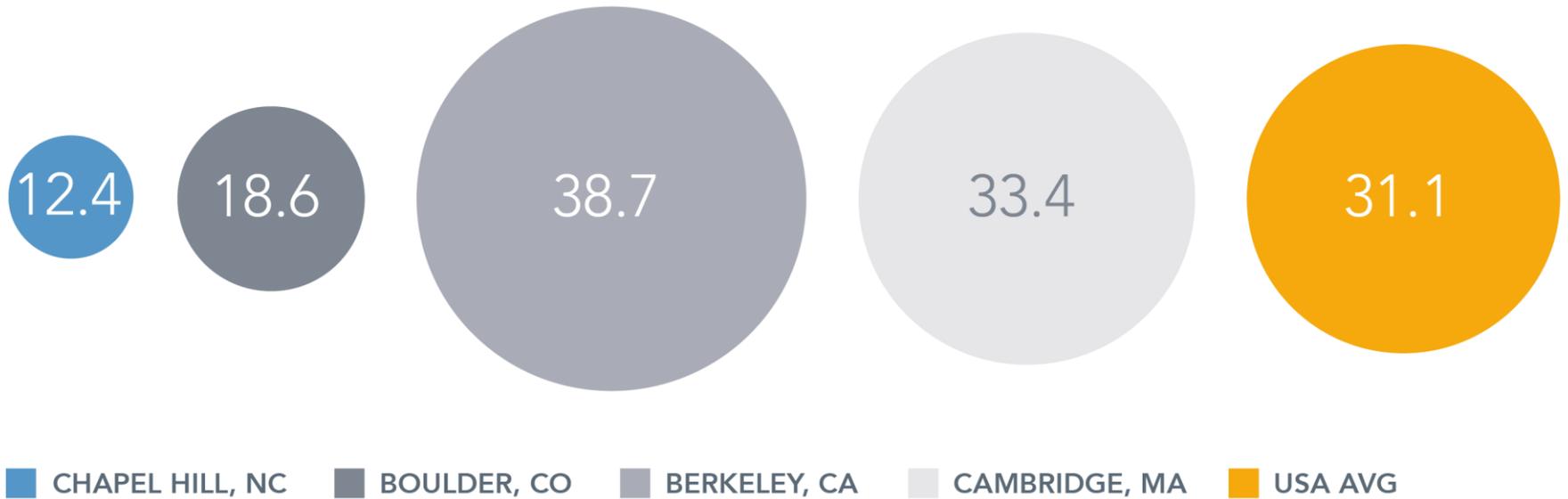
■ 40% or more ■ 40% or less

Source: Towncharts.com (2016 American Community Survey).

Cost of Living Comparisons



Violent Crime



The crime indices range 1-100. A higher number corresponds with more crime. Our crime rates are based on FBI data. Violent crime is composed of four offenses: murder and nonnegligent manslaughter, forcible rape, robbery, and aggravated assault. All violent crimes involve force or threat of force.

Key Insights

Cambridge, Massachusetts

- Within region, we don't see economic development as a competition
- Economic growth is hyper-concentrated in life sciences, professional services, education and healthcare
- 9 out of 10 pharma companies have presence
- 106,000 residents. 108,000 workers.
- Challenges: Lack of space and affordability

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Key Insights

Berkeley, California

- Advantages: Located in metro area with 7M+ people, access to UC Berkeley and Lawrence Berkeley Laboratory, Quality of Life
- Challenges: Affordability (workforce housing), lack of Class A office space, resistance to change impacts ability to grow
- Significant focus on innovation and entrepreneurship:
 - Berkeley Startup Cluster
 - Startup accelerator programs
 - For profit co-working spaces

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Key Insights

Boulder, Colorado

- Biggest asset is also biggest challenge (1.8% unemployment)
- Must constantly guard against complacency
- Many of Boulder's successful companies have direct ties to university
- University has been an engine of job creation since the 1940s
- Much more focused on existing industry retention than new business recruitment (~85%/15%)

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Impressions

Chapel Hill, North Carolina

- Nice university town in the South
- Incredible university, one of the best in the nation/world
- Part of the Research Triangle, an economic powerhouse
- Highly educated
- Competitor

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Questions?

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