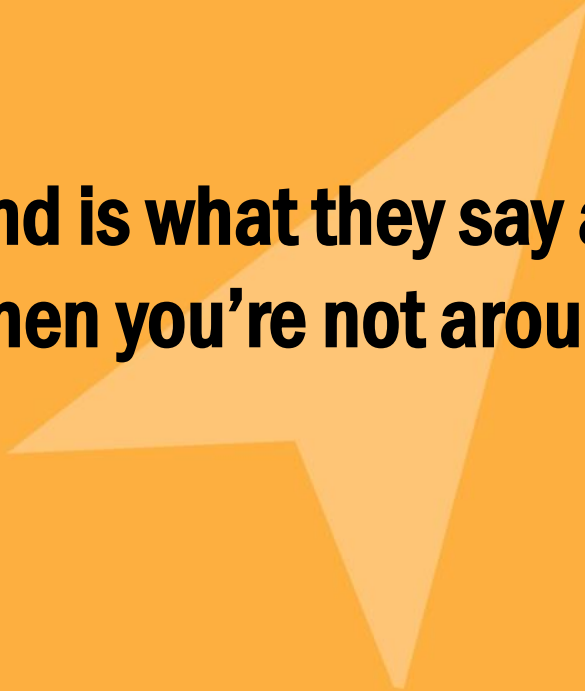


North County Communities along the 78 Corridor

Understanding & Insights Presentation
December 10, 2013



What is a brand?



**“Your brand is what they say about you
when you’re not around.”**

BRANDING IS WHAT YOU DO ABOUT IT.



Branding has a branding problem.

SOME THINK IT IS JUST A LOGO AND LINE.



Marketing and Branding

MARKETING IS HOW YOU COMMUNICATE.

BRANDING IS WHO YOU ARE.

71% of capital investment deals did not involve an initial contact with any development organization until a short list of potential location options for investment had been created.

That means that 71% of the time, your community's reputation is what gets you on a shortlist.

IEDC

“Branding is the most important thing an ED0 can do. Because that tells us, as site selectors, that you know what you are trying to be.”

– Site Selectors Guild MEMBER

Branding can impact your reputation by...

- ▶ **Gaining a true understanding of your region's reputation in a rigorous and scientific fashion.**
- ▶ **Collaborating with business and civic society to agree on a regional strategy – a narrative of who this region is and where it is going.**
- ▶ **Maintaining a steady stream of innovative products, services, policies, initiatives and communications in multiple sectors that demonstrates the truth of that narrative.**

Workplace
Design Supports
Collaboration

Location
Decisions and
Right-to-Work

Mobility
Technologies &
Location Strategy

AREA DEVELOPMENT

SITE AND FACILITY PLANNING

www.areadevelopment.com
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EXECUTIVE SURVEY ISSUE

SUMMER 2012

SPECIAL
REPORT

2012
SHOVEL
AWARD
WINNERS

CREATING
NEW JOBS
& SECURING
INVESTMENTS

Advanced
Manufacturing
to Drive U.S.
Economic
Engine

100 LEADING LOCATIONS for 2012

Which MSAs
Rank Highest
for Economic
& Job Growth?



Why Columbus, Indiana is the #1 Leading Location in the U.S.

More **mechanical engineers** per capita and **three times the national average** for engineering employment.

Home to three separate **national R&D / Tech Centers** and one **Fortune 200 Global Headquarters**.

Project-based **STEM education** programming offered in local schools from Grades K-16.

Surprised that Columbus, Indiana is #1? Now is a great time to take a closer look at the **unexpected** wealth of opportunities this **unforgettable** community has to offer.



columbusindiana
unexpected.unforgettable.

columbusIN.org | 812-378-7300



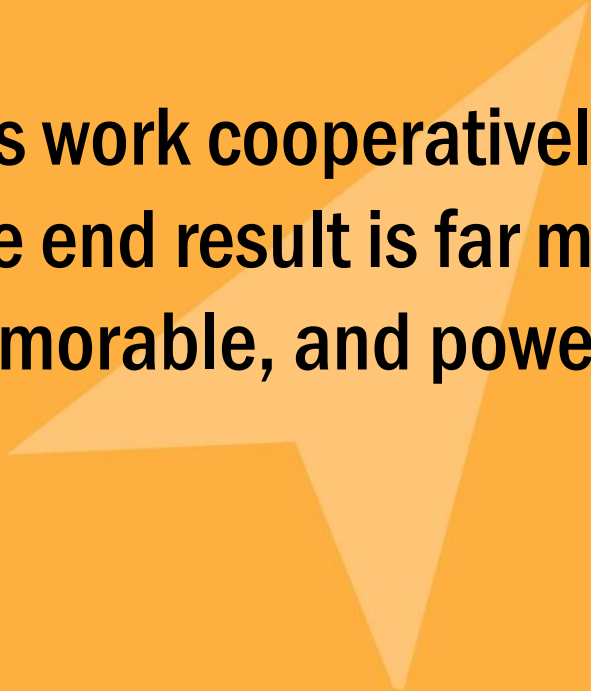
So what is your hope or goal for a project like this?

**WE CANNOT TELL YOU TO BE SOMETHING YOU ARE NOT.
WE WON'T DO IT. EVEN IF THAT IS YOUR SECRET HOPE.**



Brands are about emotion and experience.

WHAT EMOTION DOES NORTH COUNTY EVOKE?



When organizations work cooperatively from an agreed-upon strategy, the end result is far more cost-effective, memorable, and powerful.

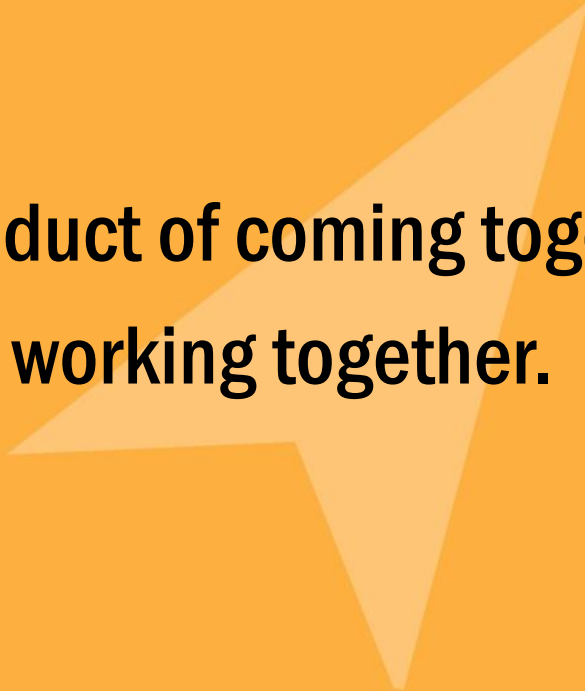
**THIS IS THE BEST WAY FORWARD TO
NORTH COUNTY'S PREFERRED FUTURE.**

HOW REGIONAL BRANDING WORKS...

Conflict is replaced with collaboration in an attempt to maximize development opportunities and take advantage of naturally occurring economies.

NORTH STAR'S APPROACH IS DIFFERENT

- **Approach unites formerly divided entities.**
- **All consumer touch points send same strong singular message throughout North County region.**
- **Reputation and relationships are the name of the game for economic development.**
- **North County needs a compelling brand that can support recruitment of a broad range of economic development investment – from talent to business to industry.**



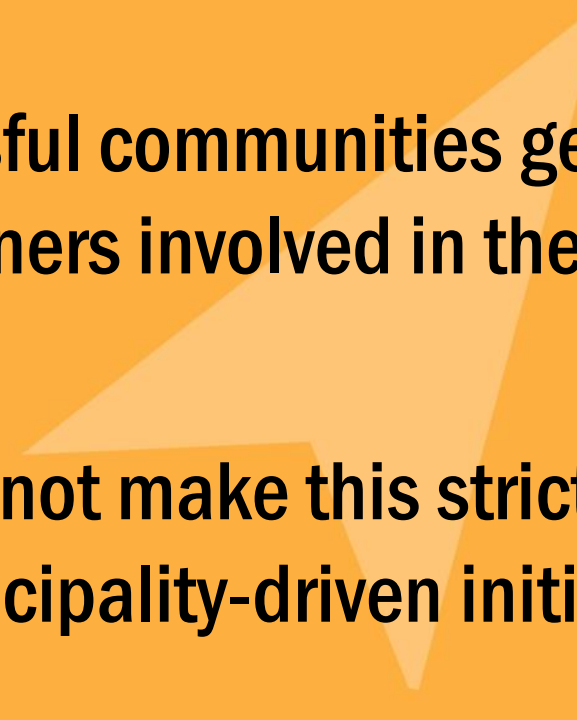
**A byproduct of coming together is
working together.**

Leaders owe it to their individual and institutional constituents to dig out the competitive identity of the region.

This will come from the culture, history, geography and society of the place; it should be an accurate reflection of the genius and the will of the people.

When you dig out these qualities through detailed qualitative and quantitative research tools, you achieve a focused snapshot of the region's values, assets, and priorities.

Brands uncovered in this manner are endorsed and absorbed by their communities due to their fundamental truth.



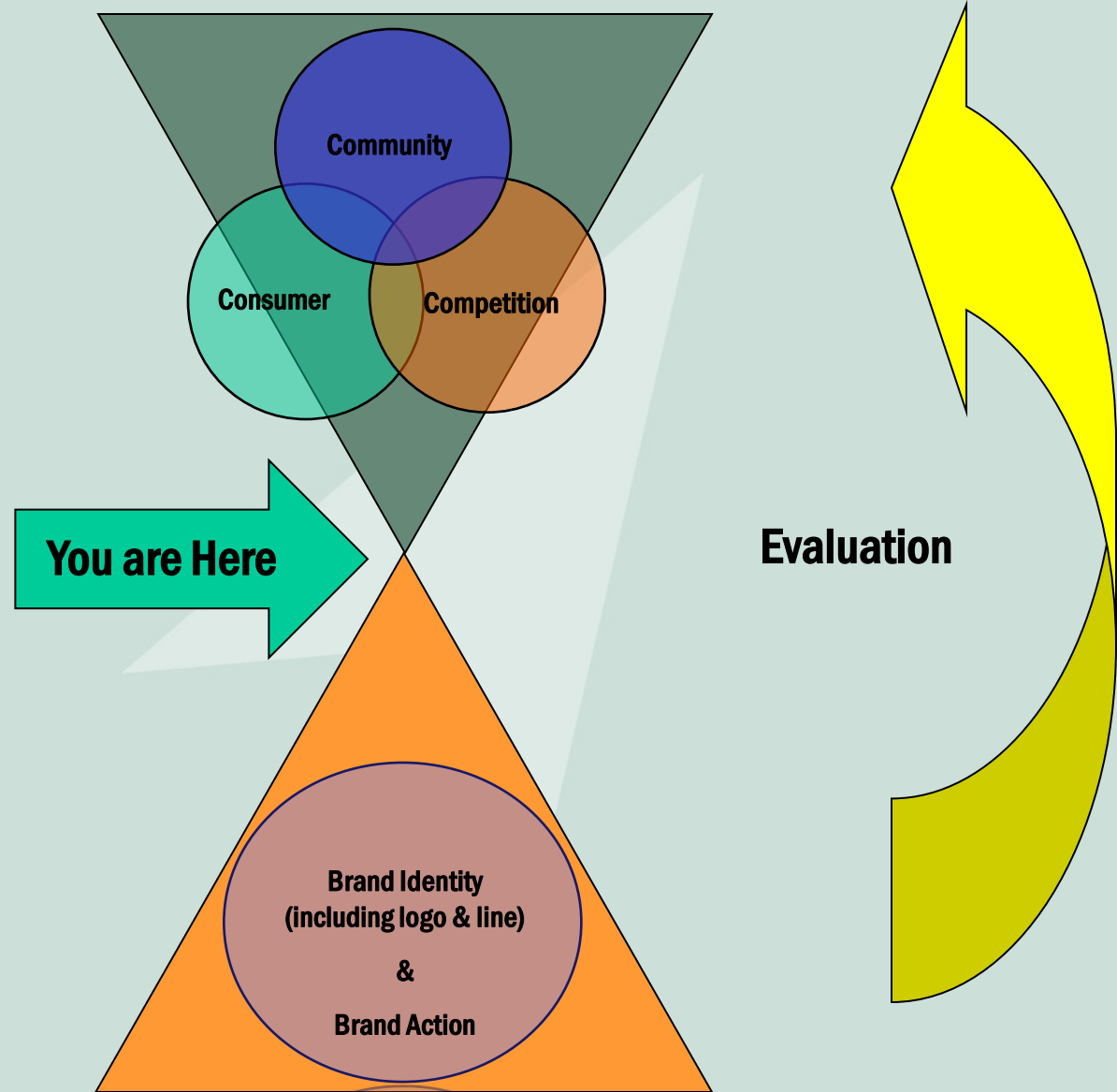
The most successful communities get commercial and industrial partners involved in their brands early.

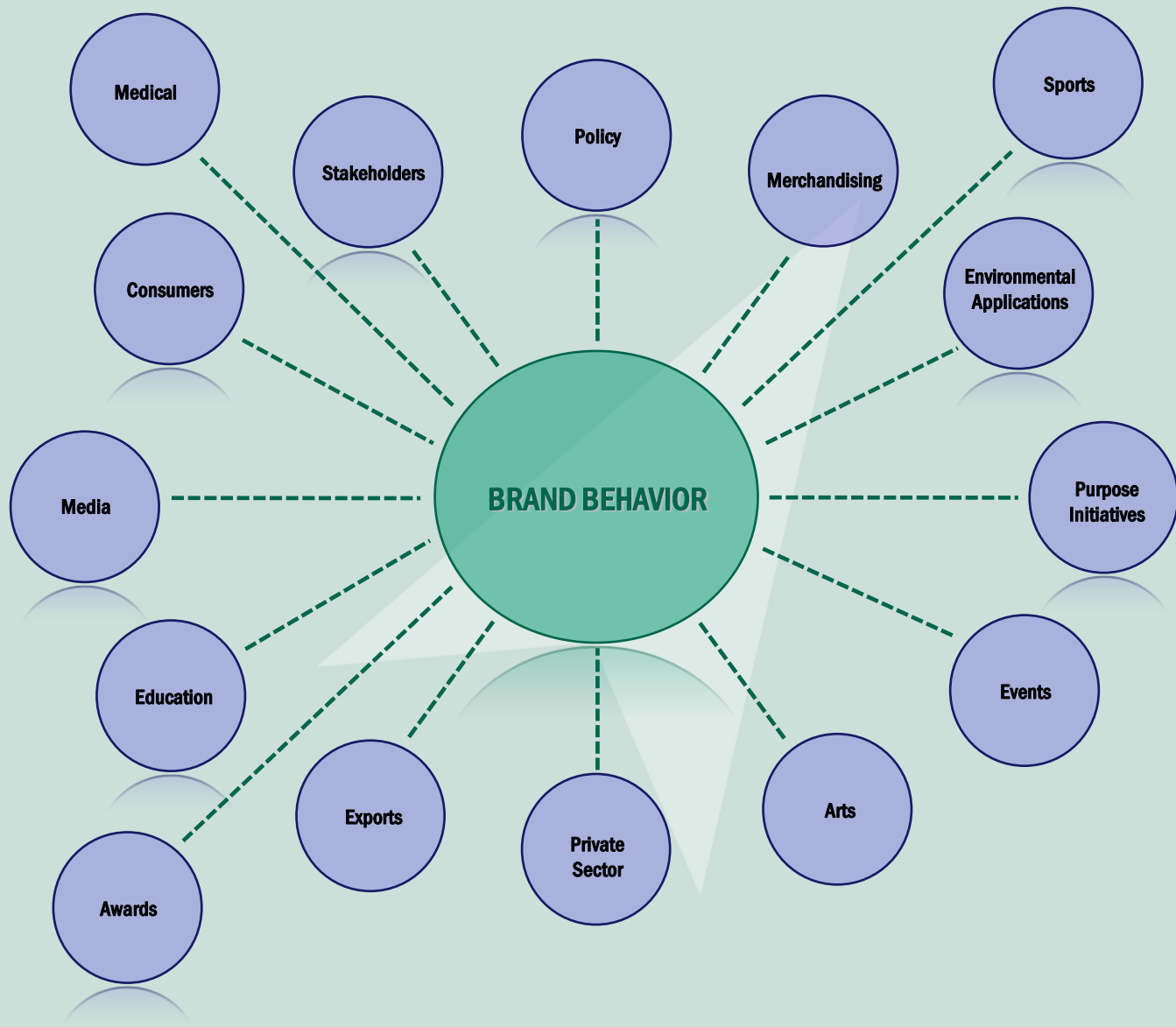
Do not make this strictly a municipality-driven initiative.

Understanding

Insights

Imagination





RESEARCH INSTRUMENTS

Community

Research & Planning Audit
Communication Audit
Situation Analysis
Familiarization Tour
Site Selector Tour
Stakeholders
- *Key Stakeholder Interviews*
- *Stakeholder Focus Groups*
- *Undercover Interviews*
- *Vision Survey / Brand Barometer*
C-Level Perception Study
Geo-demography
Consumer Profiling
(Residents)

Consumers

Geo-demography Consumer
Profiling (Region)
C-Level Perception Study
(Qualitative)
Business Development Awareness
& Perception Study
(Quantitative) Visitors and
Non-visitors
Top Business Prospects
Site Selector Positioning
Online Brand Monitoring
Asset Mapping

Competition

Competitive Positioning Review
Brand Message Assessment
C-Level Perception Study
(Qualitative)
Business Development
Awareness & Perception Study
(Quantitative) Visitors and
Non-visitors
Asset Mapping

QUALITATIVE RESEARCH

IN MARKET

Familiarization Tour
Site Selector Tour
Stakeholder Interviews
Focus Groups
Undercover Interviews

200+ different people

VISION SURVEY

Community and
Business Leaders

Qualitative survey

77 respondents

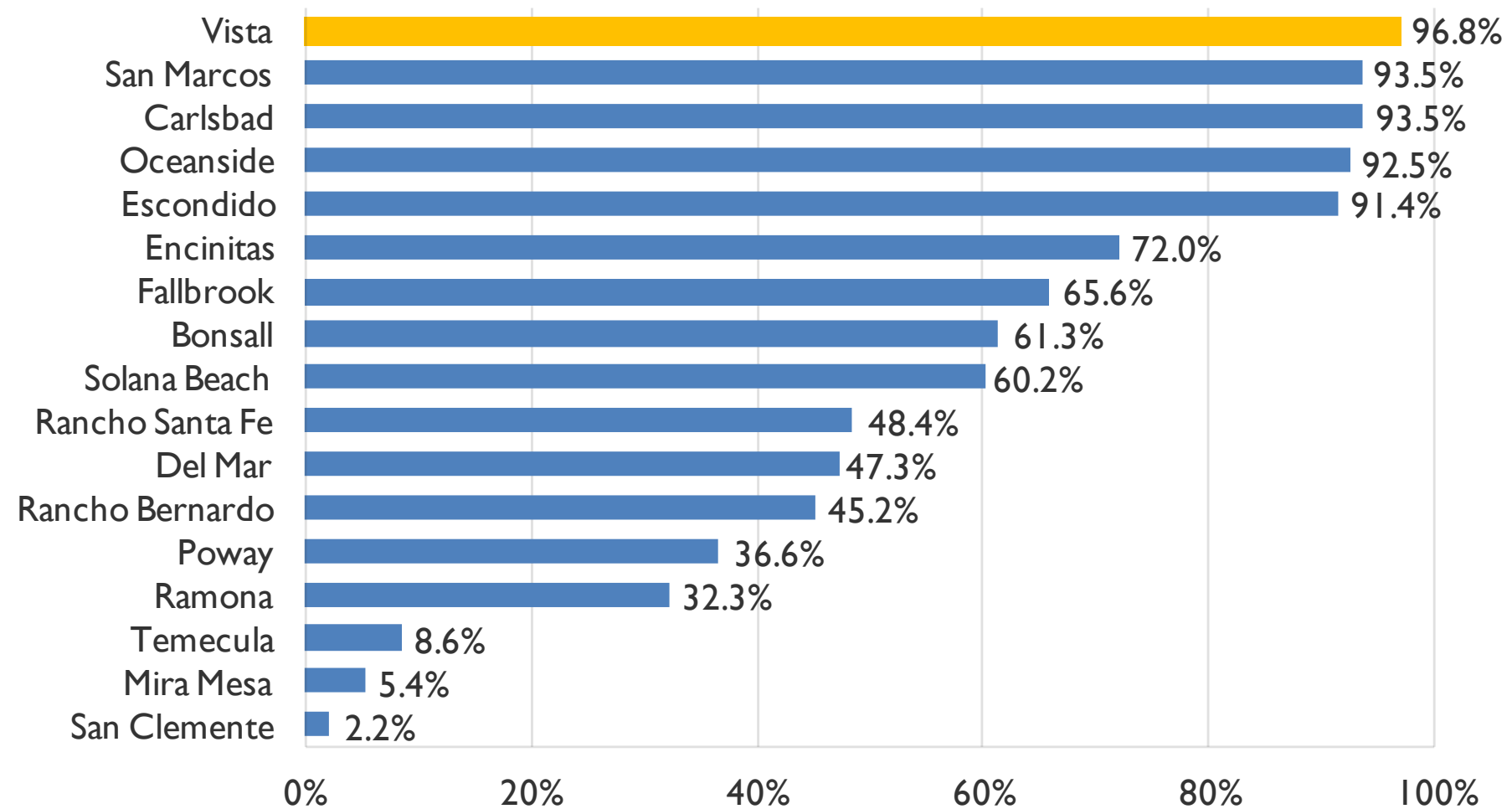
C-LEVEL PERCEPTIONS

C-Level business leaders
executives/entrepreneurs

Qualitative phone
conversations

Dozens

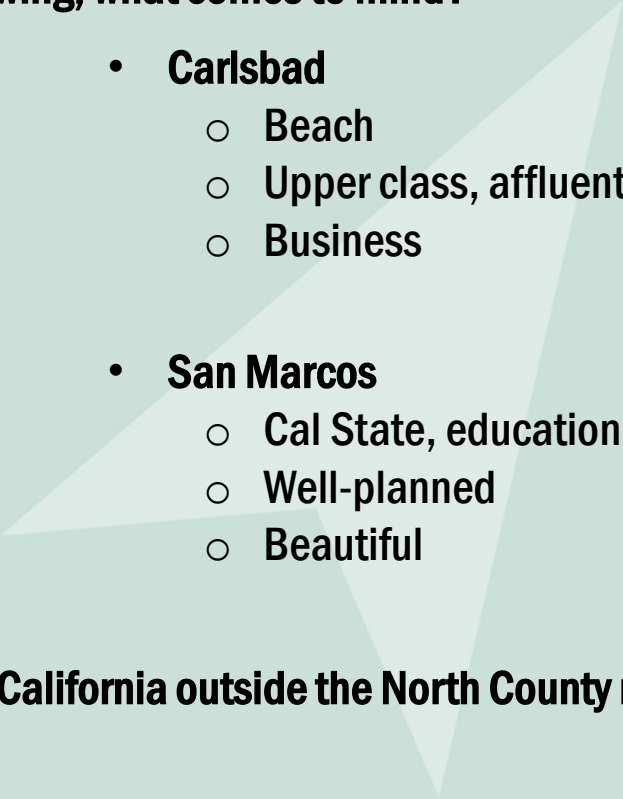
Which of the following communities do you consider to be a part of the North County region? Check all that apply.



Community Leader Perceptions

DEFINING NORTH COUNTY

When you first think of the following, what comes to mind?

- 
- **North County**
 - Beautiful landscape
 - High quality of life
 - Suburbia
 - **Carlsbad**
 - Beach
 - Upper class, affluent
 - Business
 - **Escondido**
 - Hot
 - Tourism
 - Rough area
 - **Oceanside**
 - Beach community
 - Military influence
 - Tough neighborhood
 - **San Marcos**
 - Cal State, education
 - Well-planned
 - Beautiful
 - **Vista**
 - Needs improvement
 - Nice area
 - Business friendly

How would others in Southern California outside the North County region describe the area and its communities?

- Beautiful, near the ocean
- A nice place to live
- Residential

Community Leader Perceptions

DESCRIBING NORTH COUNTY

In your opinion, what does each of the following add to the North County region?

- **Carlsbad**

- Beach
- Tourism and retail
- Affluence

- **Escondido**

- Arts and culture
- Retail
- Tourism

- **Oceanside**

- Beaches
- Camp Pendleton

- **San Marcos**

- Education
- Business environment

- **Vista**

- Industry
- Entertainment
- Potential

SELLING POINTS

IN MARKET

More affordable

Location

Relaxed, active lifestyle (QOL)

Small town feel

Palomar Airport

Well managed

Available land

Weather & climate

Microbreweries

VISION SURVEY

C-LEVEL PERCEPTIONS



SELLING POINTS

IN MARKET

More affordable

Location

Relaxed, active lifestyle (QOL)

Small town feel

Palomar Airport

Well managed

Available land

Weather & climate

Microbreweries

VISION SURVEY

Beaches & water recreation

Weather & climate

Tourism

Location

Quality of life

Educational opportunities

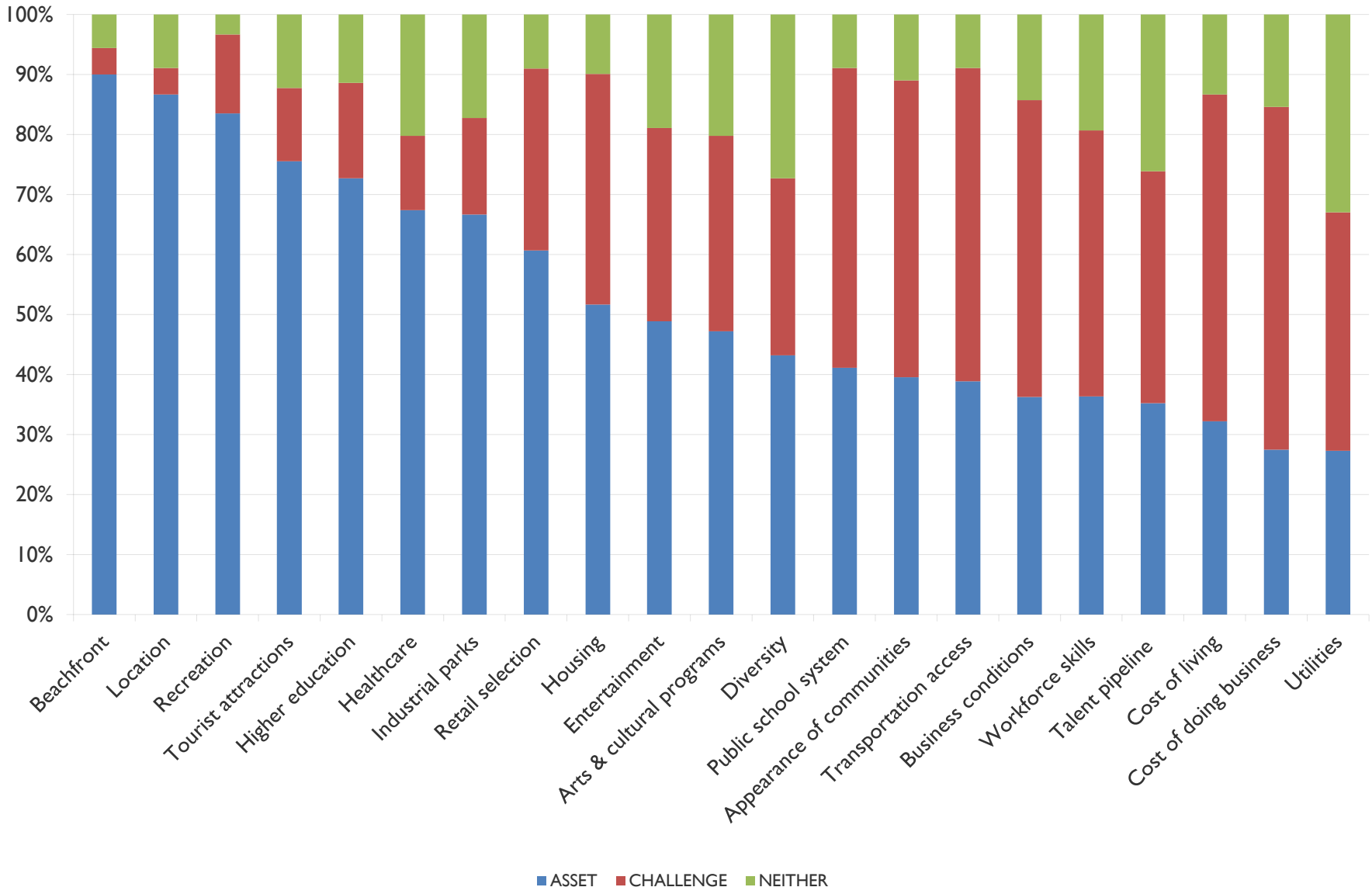
Business climate

Available land

Housing variety

C-LEVEL PERCEPTIONS

Rate the following as an existing **ASSET** supporting economic growth in North County, existing **CHALLENGE** hindering economic growth, or **NEITHER**.



Community Leader Perceptions

PERSONIFICATION OF NORTH COUNTY

If North County and its communities were vehicles, what kind would they be? Why?

- **Carlsbad**
 - *"Lexus. Upscale, reliable, trendy, and good looking."*
- **Escondido**
 - *"Ford pick up. Not flashy, but utilitarian and easy to keep."*
- **Oceanside**
 - *"Chevy. Tough exterior and a macho reputation."*
- **San Marcos**
 - *"Toyota. Solid for the family. Practical. Comes with entertainment built in."*
- **Vista**
 - *"Ford. Solidly family-oriented, but without features making it unique above the others."*



SELLING POINTS

IN MARKET

More affordable

Location

Relaxed, active lifestyle (QOL)

Small town feel

Palomar Airport

Well managed

Available land

Weather & climate

Microbreweries

VISION SURVEY

Beaches & water recreation

Weather & climate

Tourism

Location

Quality of life

Educational opportunities

Business climate

Available land

Housing variety

C-LEVEL PERCEPTIONS

More affordable

Relaxed, active lifestyle (QOL)

Location

Educational institutions

Available land

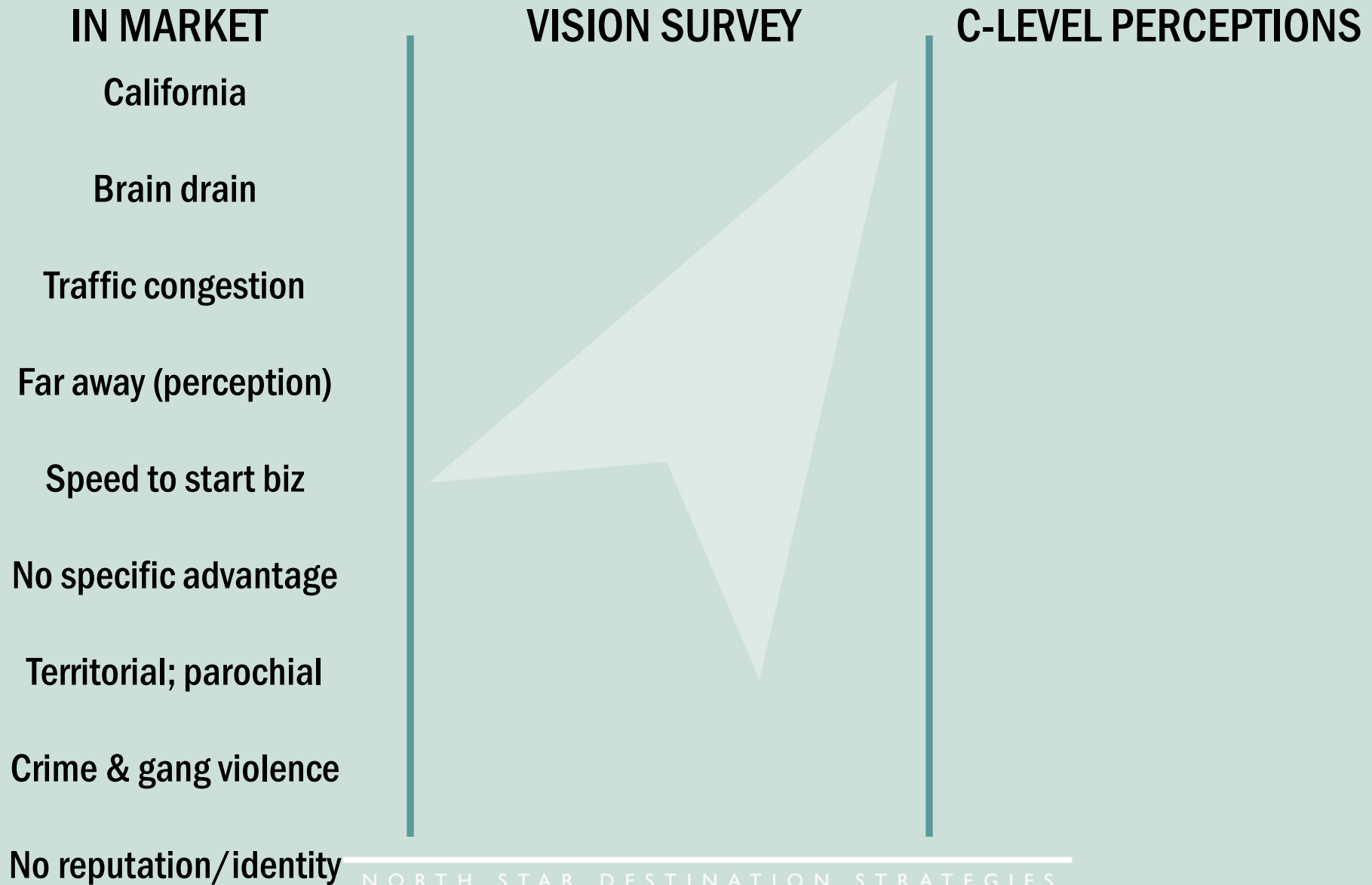
Palomar Airport

Housing variety

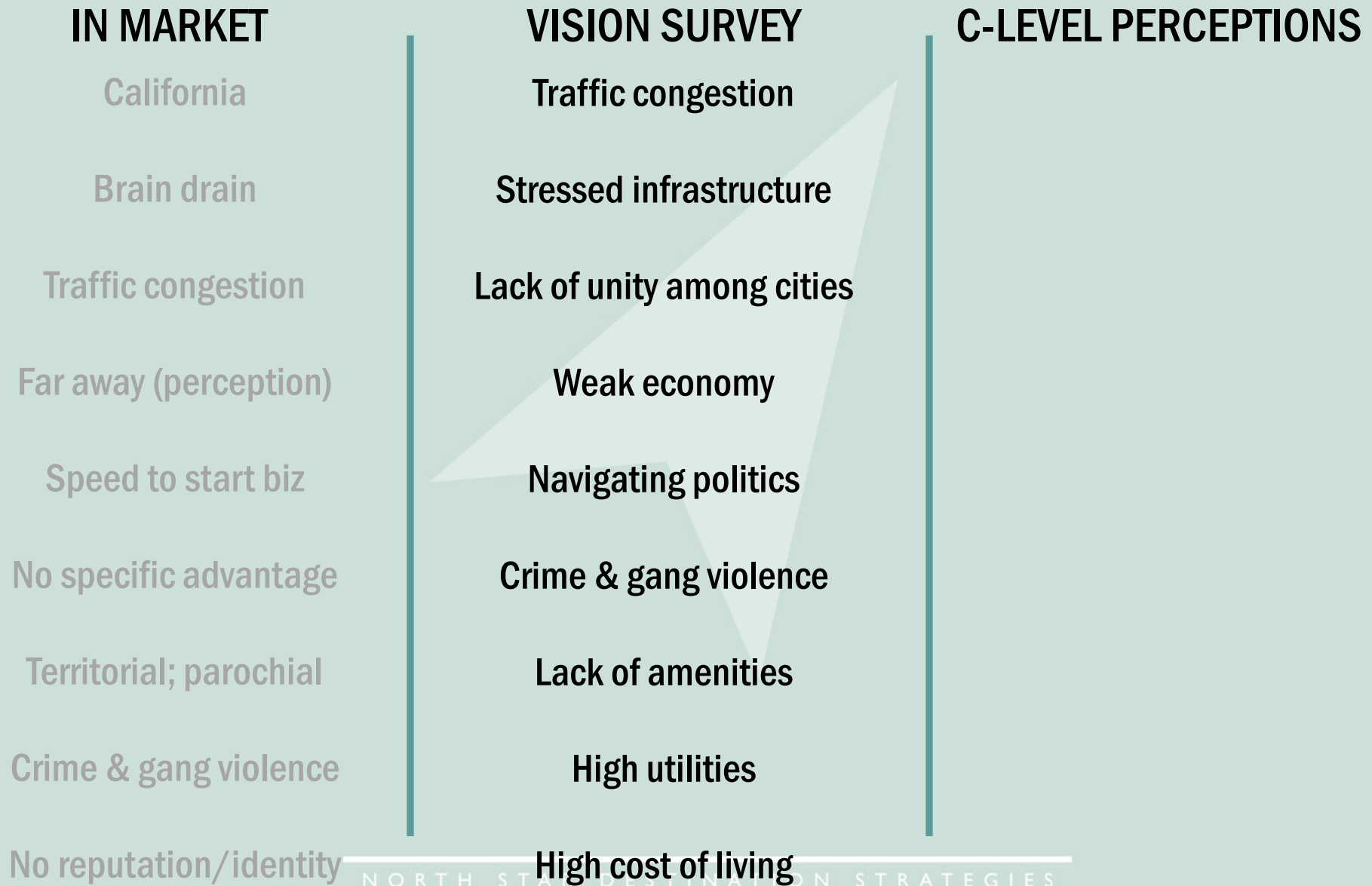
Weather & climate

Talent pipeline

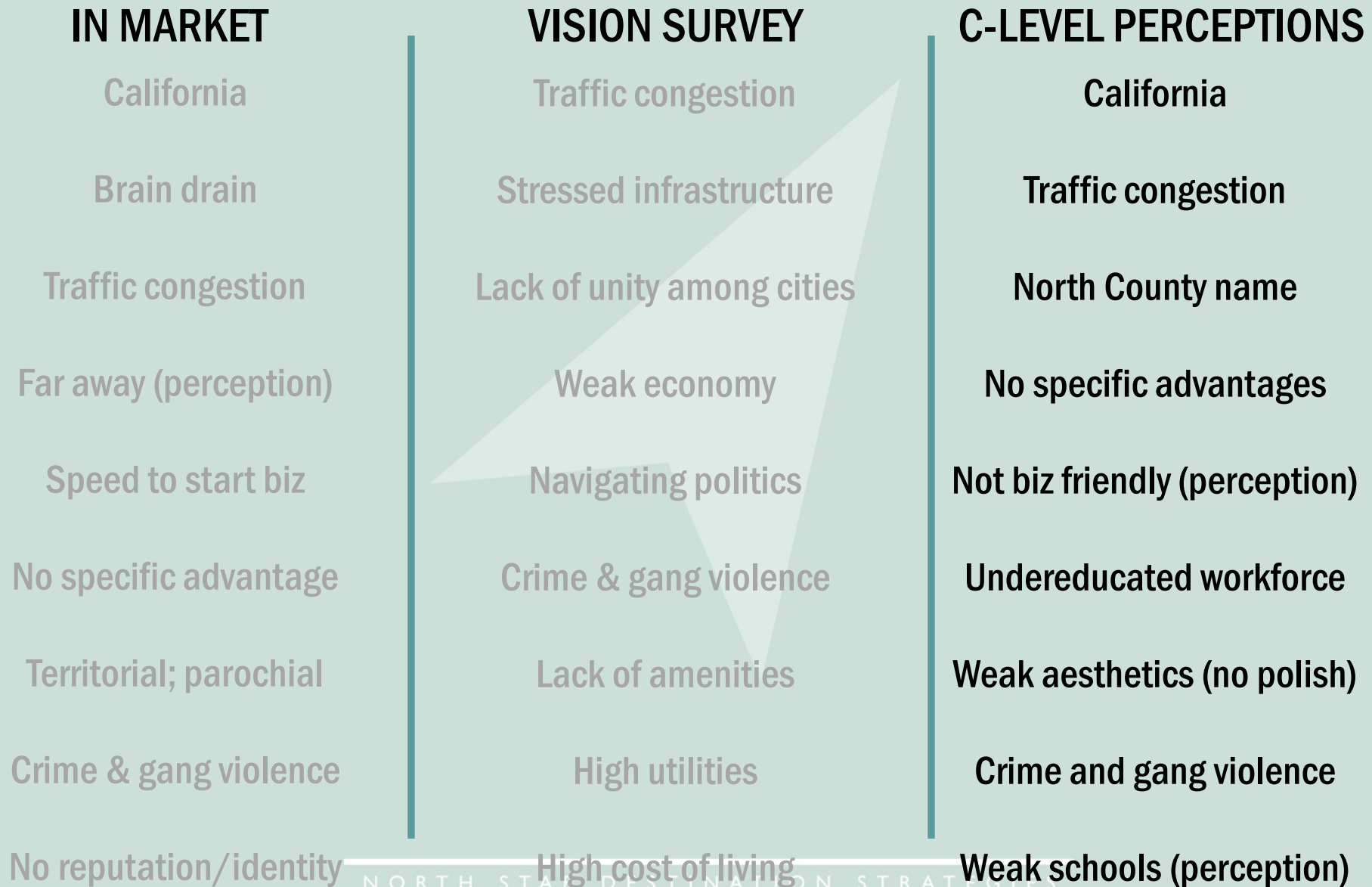
BARRIERS TO INTEREST



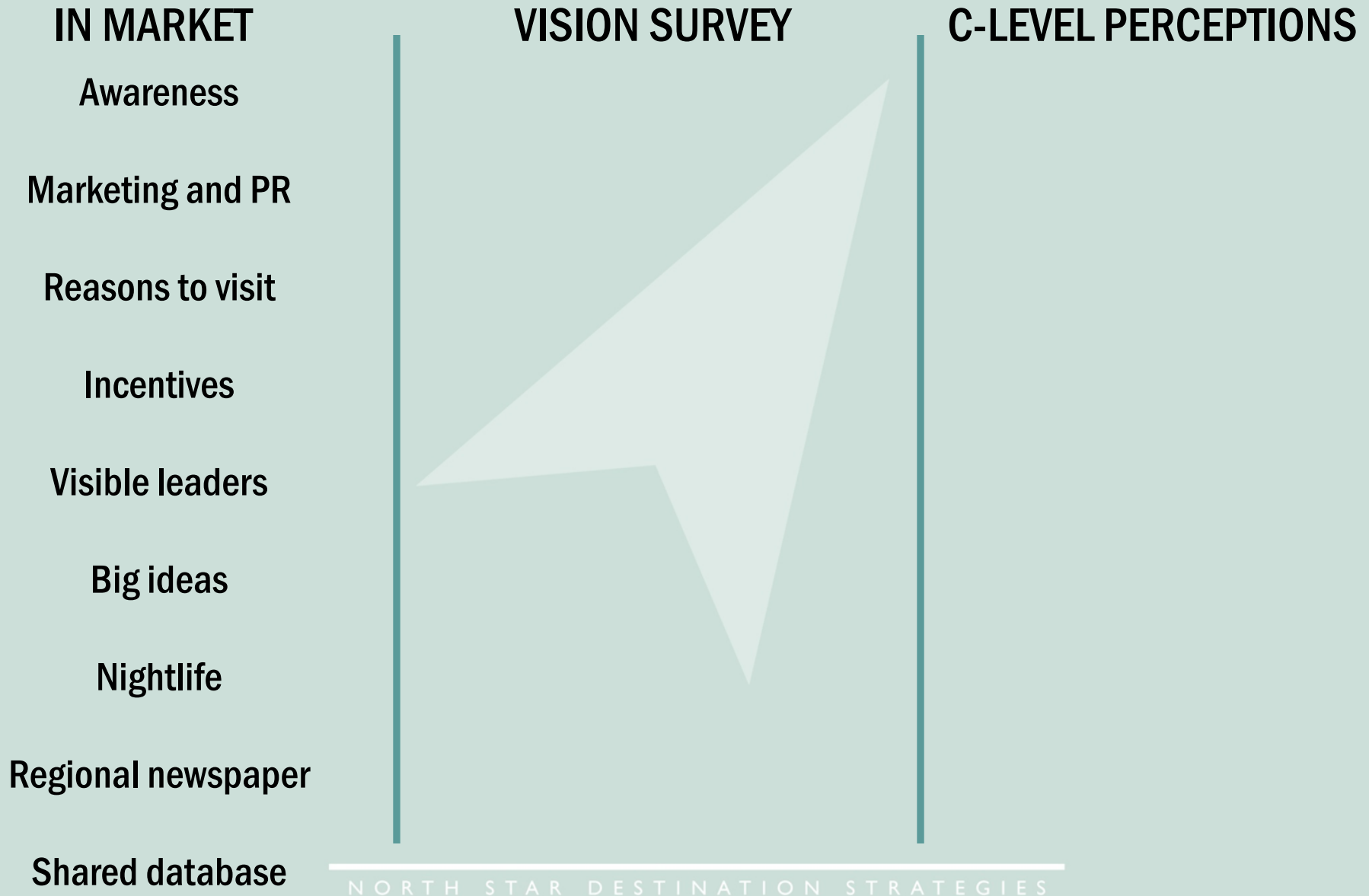
BARRIERS TO INTEREST



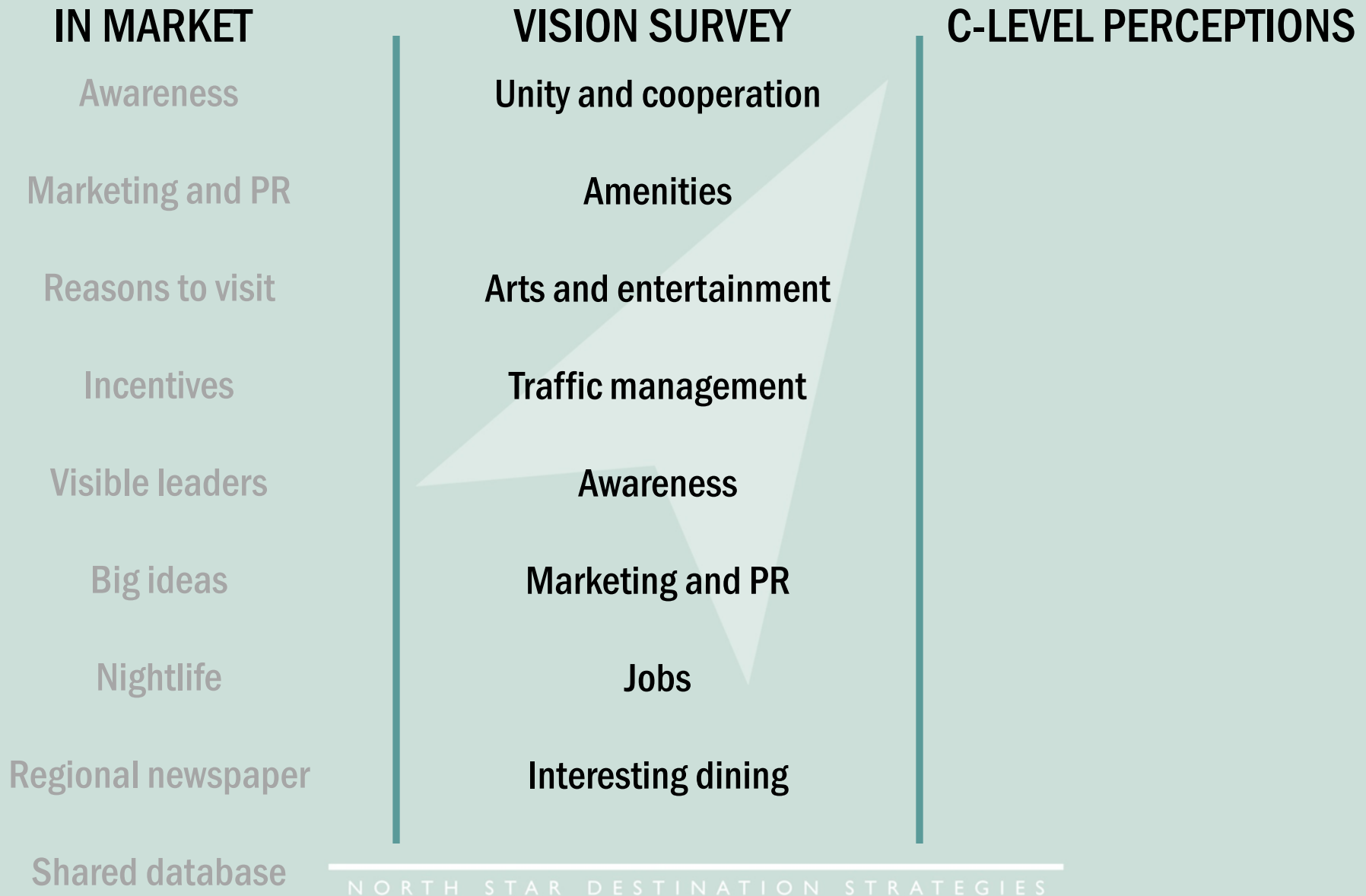
BARRIERS TO INTEREST



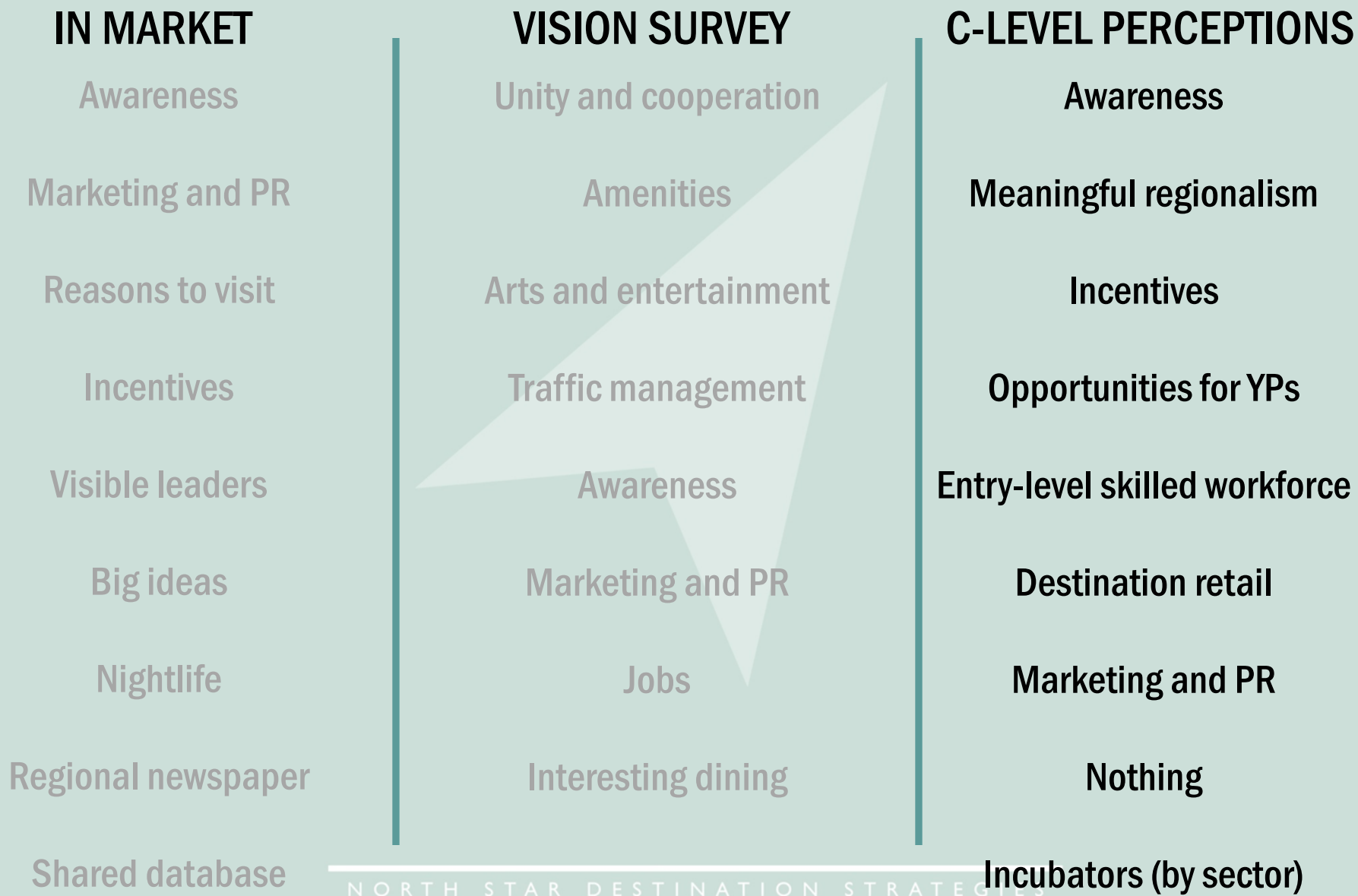
MISSING IN NORTH COUNTY



MISSING IN NORTH COUNTY



MISSING IN NORTH COUNTY



OPPORTUNITIES

IN MARKET

Regionalism

Palomar Airport

Relaxed, active lifestyle

Tourism

Curated ECD

Marketing & PR

Entrepreneurs/ideas

Diversity of companies

Spinoffs of current orgs

VISION SURVEY

C-LEVEL PERCEPTIONS

OPPORTUNITIES

IN MARKET

Regionalism

Palomar Airport

Relaxed, active lifestyle

Tourism

Curated ECD

Marketing & PR

Entrepreneurs/ideas

Diversity of companies

Spinoffs of current orgs

VISION SURVEY

Improved infrastructure

Ease of doing business

Education

Improved public safety

Affordable housing

Walkable gathering spots

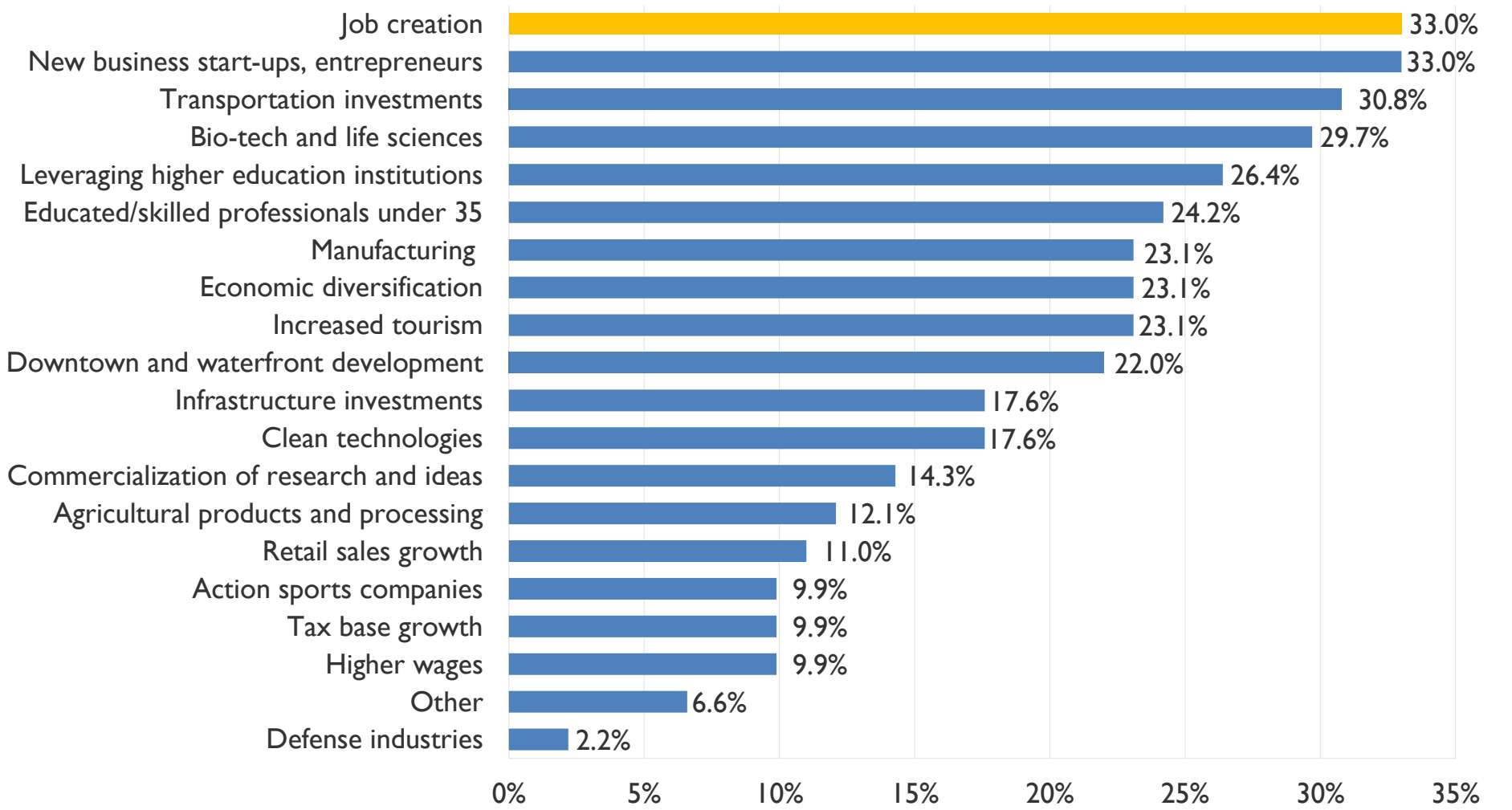
Start-ups and entrepreneurs

Transportation investment

Biotech and life sciences

C-LEVEL PERCEPTIONS

North County's economic growth goals should be developing, attracting, or expanding which of the following?
Choose three.



Community Leader Perceptions

DESCRIBING NORTH COUNTY

From your perspective, please identify which 3 cities/regions are North County's main competitors for economic development and explain why.

- San Diego
 - *“Home for major corporations and an aggressive economic strategy tied to local universities, colleges, and workforce organizations.”*
- Carlsbad
 - *“It's an established business park and location.”*
- San Marcos
 - *“They seem like they are always moving forward.”*
- Temecula
 - *“Everything is newer and cheaper, and there is more of it.”*

OPPORTUNITIES

IN MARKET

Regionalism

Palomar Airport

Relaxed, active lifestyle

Tourism

Curated ECD

Marketing & PR

Entrepreneurs/ideas

Diversity of companies

Spinoffs of current orgs

VISION SURVEY

Improved infrastructure

Ease of doing business

Education

Improved public safety

Affordable housing

Walkable gathering spots

Start-ups and entrepreneurs

Transportation investment

Biotech and life sciences

C-LEVEL PERCEPTIONS

Regionalism

Marketing & PR

Biz friendly distinction

Knowledge economy (R&D)

Distribution

Sports mfg

Industrial/tech clusters

Partnerships (univ, tech)

Relaxed, active lifestyle

Articulate Voices from the Research

- *“If all of North County was like Carlsbad, we’d be Orange County.”*
- *“There is sticker shock for those from out of state...you’re going to pay for it...you’re going to enjoy it...if you can fit it into your budget now, in five years you will not even notice it.”*
- *“I’m surprised by the depth and diversity of companies that are here. Northrup Grumman, TaylorMade, world class companies that are doing business here. North County has that depth and diversity, and it’s not talked about enough...not understood. It may be understood in that little niche, but not in wider circles.”*
- *“You’ll pull your hair out over these business restrictions.”*
- *“It’s more business friendly than San Diego...developers may feel differently, but it is overall friendly.”*
- *“Twenty years ago I would never have said that I am from San Marcos...I would say San Diego...now I say San Marcos – North San Diego County. Suburban area that has lots of what San Diego has to offer without the density.”*
- *“Change the attitude about who lives here and who doesn’t live here.”*
- *“The most negative people are the longtime residents.”*

Articulate Voices from the Research

- *“The hiring of skilled labor is not a problem...there is not a shortage of higher skilled people.”*
- *“Lifestyle is a key motivator of those who live here and stay here.”*
- *“California – profit margins are better. Florida – price levels are better.”*
- *“Package it as access...there is a price to the access that we have...the largest economy in the U.S...one of the largest economies in the world.”*
- *“Working through impediments, and the money grubbing of the state, has made it hard to retain and attract business.”*
- *“The state has made it more challenging to succeed.”*
- *“When you leave people out, you will get opposition to the brand.”*
- *“Moved last Fall to Carlsbad because the rent prices were low (price per square ft) and we can keep growing there.”*
- *“Sell quality of life for employees – cost of living and cost of doing business is a Sunshine tax.”*
- *“No regional bank, no newspaper, no voice up here...been treated like country bumpkins because San Diego is our main competition.”*

Articulate Voices from the Research

- *“Inconsistency in interpreting state-wide regulations between cities...some of the building departments are much more difficult.”*
- *“Some cities are still fragmented, and that makes it hard to pull them together.”*
- *“Big firms are here because they bought smaller firms...have grown into big firms.”*
- *“Cities have had business retention programs that have gotten squeezed out of budgets.”*
- *“Best business retention program has been getting out and shaking hands.”*
- *“Challenge of each area...very unequal inventory of properties. Some cities don’t have inventory to accommodate all uses.”*
- *“Focus on the entrepreneurial spirit of the people...they are here because of the lifestyle, and want to start their companies here.”*
- *“The cities can be inflexible.”*
- *“Need departments talk to each other more (within city government)...getting all those people in the room together can take months.”*

Articulate Voices from the Research

- *“It’s hard to have an identity within San Diego.”*
- *“North County does not mean anything to San Francisco.”*
- *“We are business friendly and improving...past councils were afraid of risk.”*
- *“San Diego is built out, but not us.”*
- *“If another city wins, they will employ my residents.”*
- *“We live in paradise.”*
- *“There are no cooperative projects except this.”*
- *“We need more businesses here and fewer commuters.”*
- *“We have not earned the reputation as an industrial or business hub.”*
- *“North County personality: schizophrenic. It’s all over the place, there’s no common identity.”*
- *“Older people think of North County as parochial and agricultural, and not as sophisticated, yet younger people see this region as more attractive with opportunity and activity like craft breweries.”*
- *“Biotech and tech firms are here...how do we get more...those cities have family friendly and sustainable focus for their image...not looking for bars and liquor stores.”*

Articulate Voices from the Research

- *“We have not exploded like Orange County...we’re not just asphalt on concrete...there’s a lot of open space and golf here.”*
- *“Eye appeal is buy appeal...image and appearance is important.”*
- *“That sun is not free.”*
- *“We have to make the transition smooth for new businesses...speed to start is important.”*
- *“People are hesitant to go to San Diego because of the prevailing wage and unions...no political stability in San Diego.”*
- *“We all have charming downtowns that need some improvement.”*
- *“It’s easier to do business here than in San Diego County or the city.”*
- *“Collaboration as five cities is difficult. It’s hard enough to get your own city to make decisions in an expedited manner.”*
- *“Is regionalism just talk? Some cities are slow to come to the table.”*
- *“We do our job right as great places to live, that is the #1 job in ECD...property values are high, the community is vibrant, and CEOs want to live here. We overthink the science of this.”*

Articulate Voices from the Research

- *“We are difficult and slow. We hear that a lot.”*
- *“No one is coming together to talk about what is good for all of us...we lobby SANDAG individually.”*
- *“Stop putting development where there is no infrastructure development.”*
- *“California is doing everything it can do to send companies to Nevada and Texas.”*
- *“We need high wages; we have too many fast food workers.”*
- *“We feel left out of San Diego County and the city proper...we get the short end of the stick.”*
- *“North County can house all levels of employees in North County.”*
- *“Smack in the middle of huge markets. Elsewhere in the County only has San Diego County to pick from.”*
- *“Stop competing and poaching against each other.”*
- *“SANDAG attention is to the South.”*
- *“We have a third the population, but not that amount of the resources.”*

Articulate Voices from the Research

- *“Everything is available in these communities from shopping to swimming, beaches, regional and world known activities, dining and breweries/wineries.”*
- *“North County is the best place to live in the United States!”*
- *“North County has an unparalleled quality of life.”*
- *“We have a high quality of living with great access locally to all things and the ability to quickly get to other destinations.”*
- *“We have very good corporate and industrial opportunities with an educated work force and good infrastructure.”*
- *“Great aesthetic appeal.”*
- *“Unparalleled quality of life - each community's unique identity has markers, like artistic communities, craft clusters, unique individuals who are 'big thinkers,' aim high, inspire others, teach by living example, try hard, promote healthy habits, and reflect a collective interest to improve our 'space' now.”*

Articulate Voices from the Research

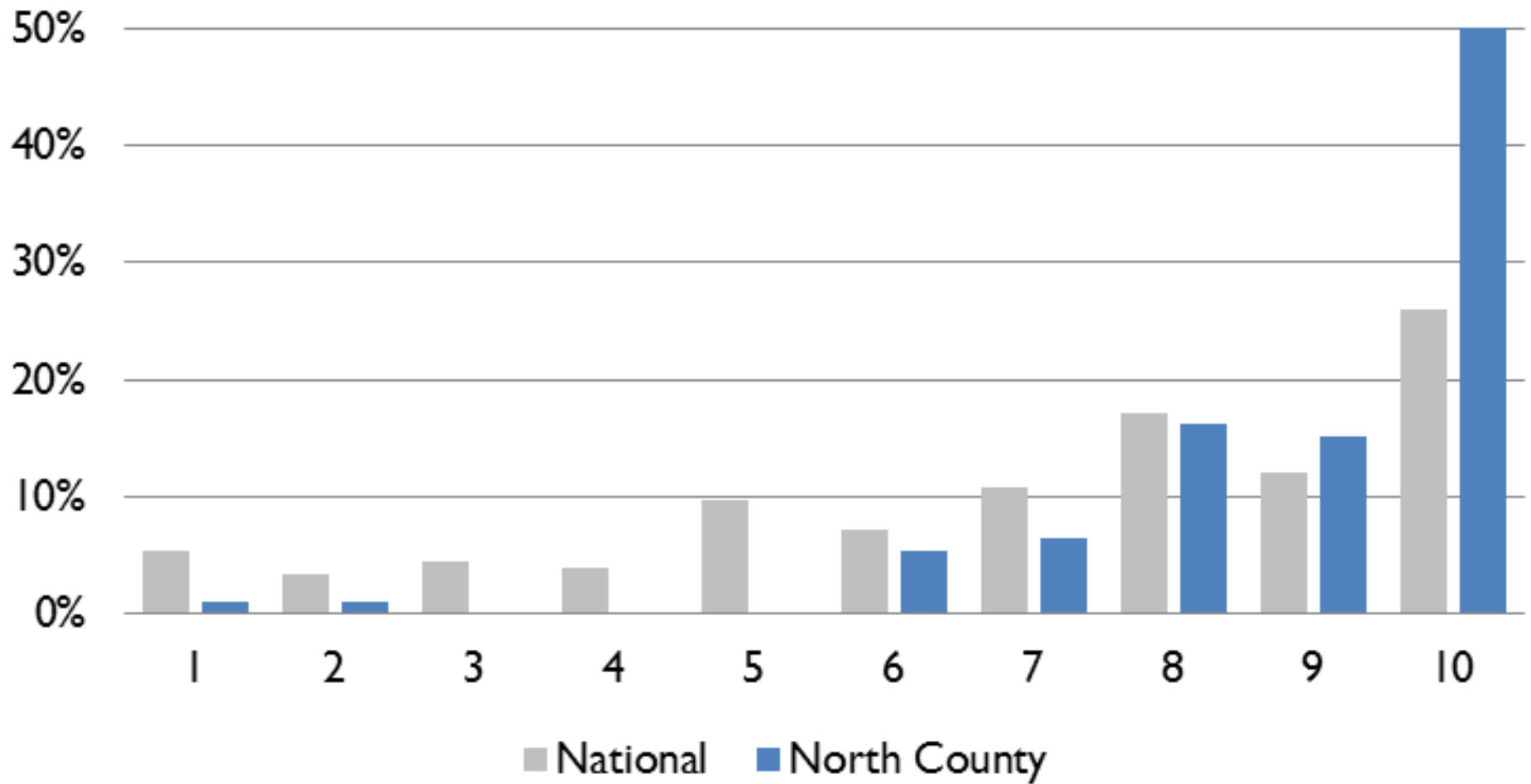
- *“The beach and great weather are the most important to our identity!”*
- *“North County is still relatively undiscovered - its diverse offerings surprise most people.”*
- *“It’s location differentiates North County – access to the beach, the city, the country, the mountains and the desert.”*
- *“Common interests in protecting features, amenities, natural assets, public facilities, and policies which are most valued by the community will unite our communities.”*
- *“I don’t feel that North County is unified, other than how the region is described by the residents of San Diego.”*
- *Young people will be attracted by available jobs and careers that produce enough income to live locally in North County.”*
- *“Young professionals like brewery tours, highlighting the independent restaurants, gastro pubs, shops and an upscale feel to the downtown areas. Mainly an area offering hip places to shop and eat and unique places you can only get here.”*
- *“Continuing emphases on higher education resources will draw young professionals.”*
- *“A thriving and high achieving public school system will keep young families and bring in new young families.”*



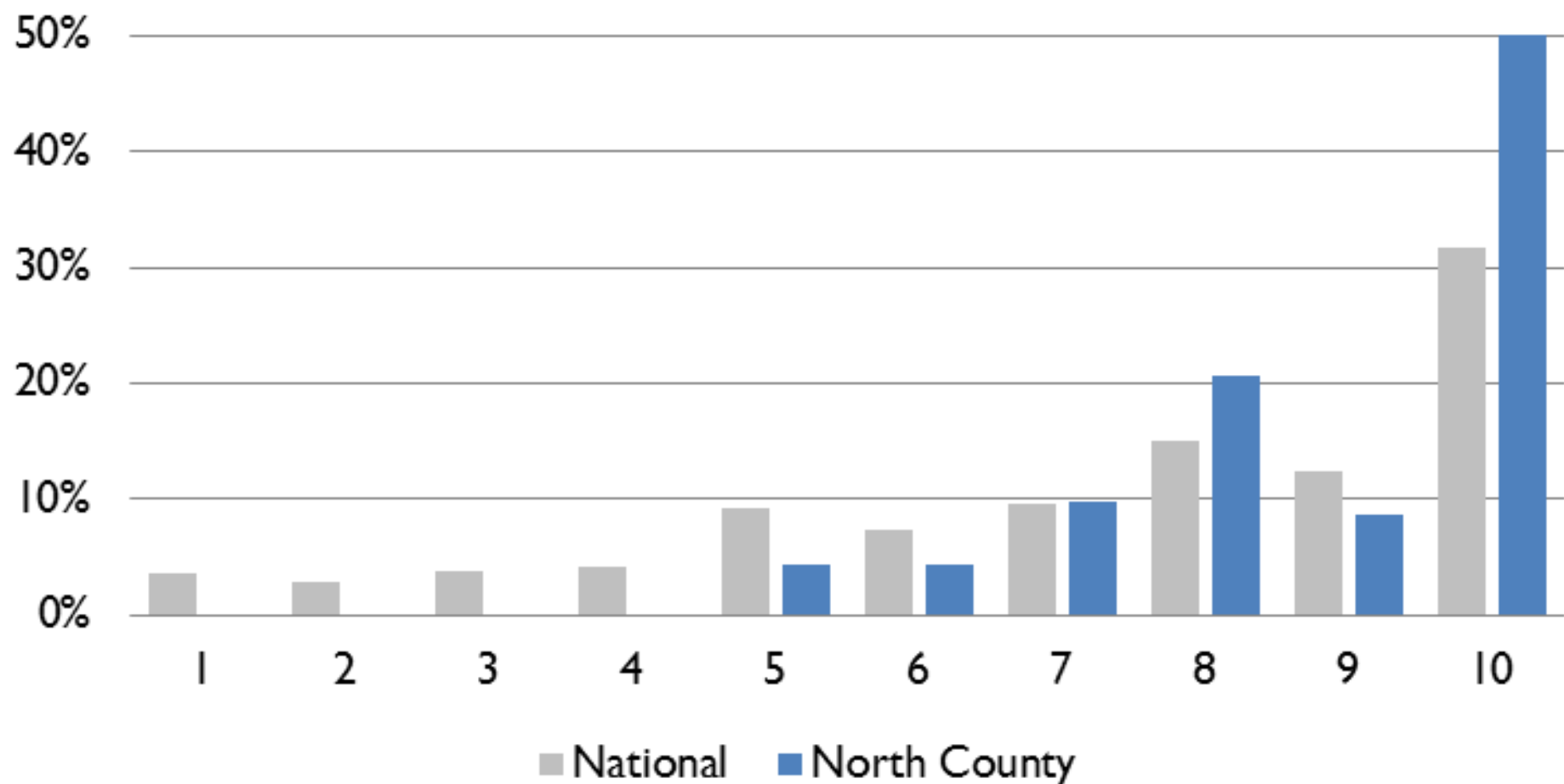
BRAND BAROMETER

On a scale of 1 to 10 with 1 being "not at all likely" and 10 being "extremely likely," would you recommend... [living in, conducting business in, visiting]... North County to a friend or colleague?

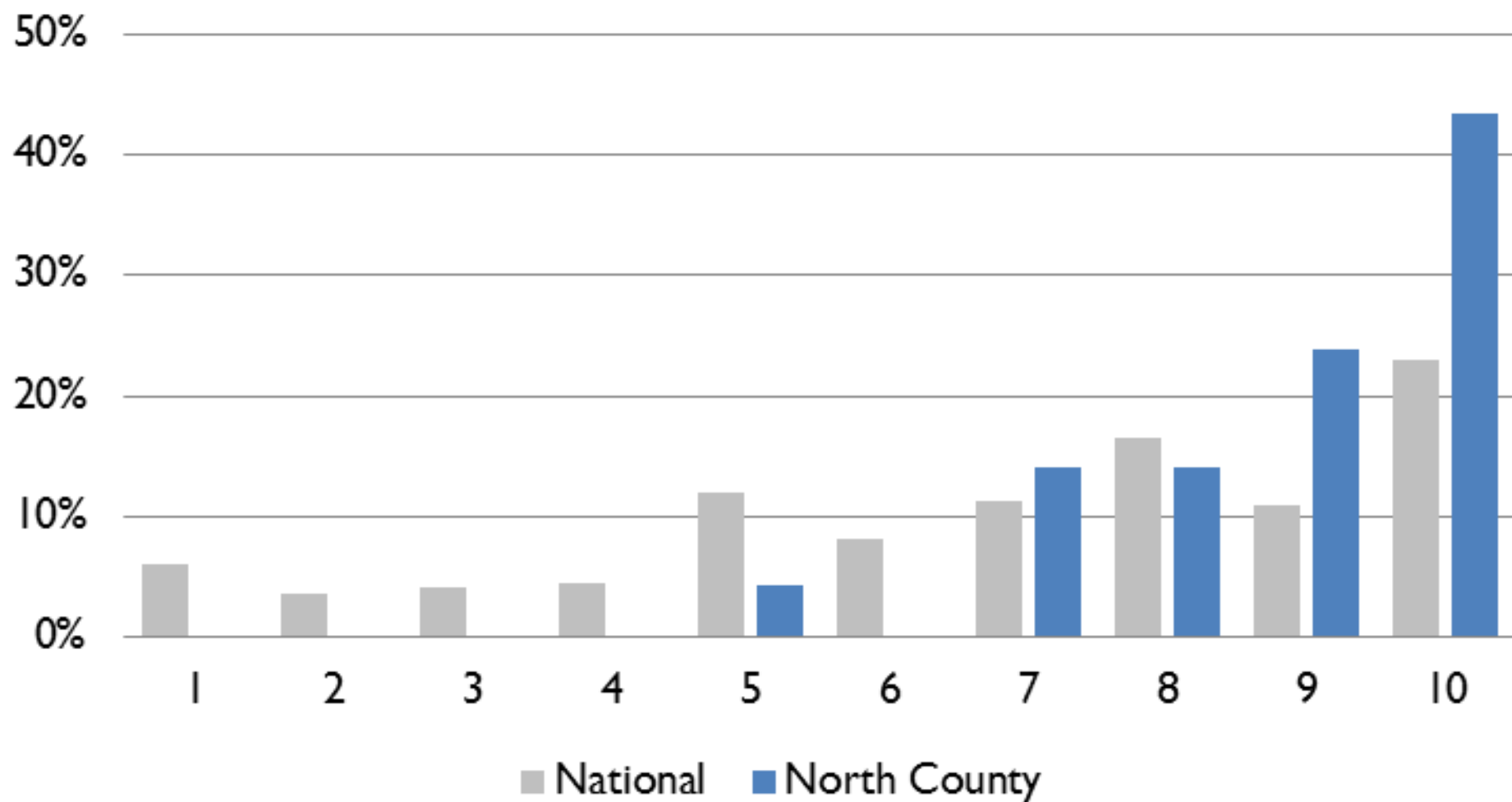
As a place to live...



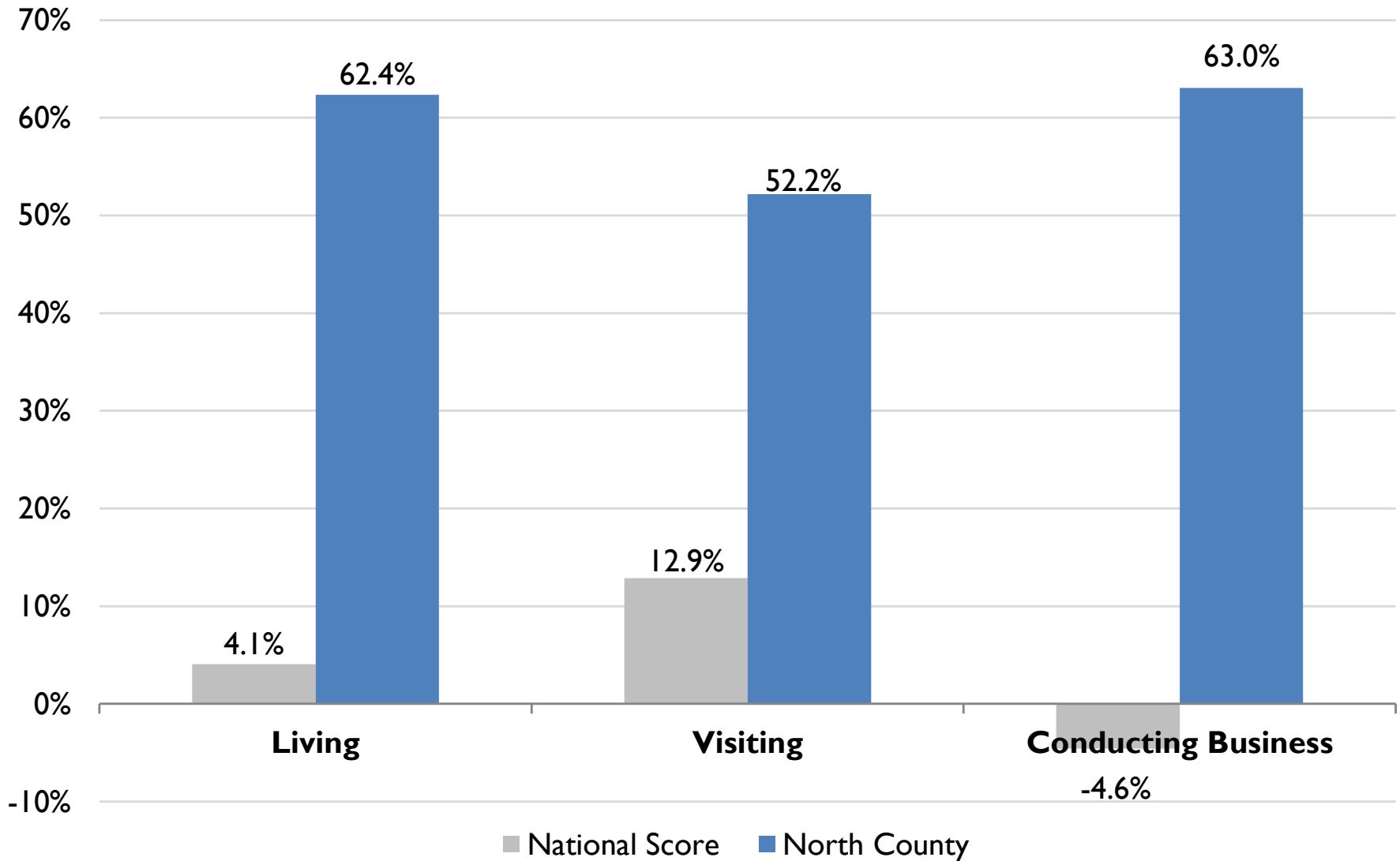
As a place to visit...



As a place to conduct business...



Brand Advocacy Comparison



Perception Study Articulate Voices From the Research

- *“North County implies the appendage of something else.”*
- *“San Diego will include us when they need our numbers or positives, otherwise they ignore us.”*
- *“We should be called Palomar, not North County.”*
- *“We have the technology, but we do not have the workforce...Mexicans are hard working and dedicated. White guys won’t do what we need done.”*
- *“Focus the region in a better direction. Change the structure of living off of tax revenue...it guides decisions.”*
- *“We have an environment that doesn’t attract educated and skilled folks...it’s the McDonalds mentality.”*
- *“We need a curated model for our business attraction; we want you and we will do what it takes to get you.”*
- *“We have a lot of inertia...you have to have commitment in a city.”*
- *“We need the ability to make something unique and special, but it’s hard without a dictatorship.”*
- *“Don’t just talk louder; do something worth talking about.”*
- *“They have not and cannot do much to keep us here. ‘We hope you stay, but we can’t help you stay.’”*

Perception Study Articulate Voices From the Research

- *“Get off work with time to watch kids sports.”*
- *“Not locked into a high rise or crammed into a condo.”*
- *“Start standing up and putting shoulders back on what has been accomplished. Stop apologizing for things or time for progress.”*
- *“San Diego has an inferiority complex to Orange County. It doesn’t see itself as Southern California...we are a cul de sac.”*
- *“North County is a recreational haven...hiking, tennis, and parks.”*
- *“Some do it really wrong. Business license is based on revenue. Already pay sales tax on products. Makes me want to move...it’s hard for a small business owner.”*
- *“When people want to attract people they start advertising...nothing is worthy of advertising in North County – we all live separate lives.”*
- *“All cities work independently to their detriment...there is no collective consciousness to North County.”*
- *“The cost of living is higher, but the ability to draw from a deep pool of talent has helped our bottom line.”*

Perception Study Articulate Voices From the Research

- *“Torrey Pines and Sorrento Valley are built out...great opportunity for us...offer tech community low to moderate cost.”*
- *“Couple for us is proximity...we can give back to the same community.”*
- *“Linkage fees for affordable housing have been adjusted and went up 500% in San Diego. This is an opportunity for North County.”*
- *“More diversity north of Rancho Bernardo is a positive...not everyone can fit in the same city.”*
- *“There is somewhere for everybody in North County.”*
- *“North County acts like they want to secede from San Diego.”*
- *“Cities work well together, but has a rocky past with SDNEDC.”*
- *“There is no consistency or traction in North County. There is so much to offer but we’re not moving together as one.”*
- *“People pay attention to how responsive and solvent and well-run a city is.”*
- *“Different governance and political takes inhibits regional approach.”*

Perception Study Articulate Voices From the Research

- *“North County is the center of the region’s innovative capacity with a work-life balance and can draw that talent (includes Golden Triangle).”*
- *“Investors don’t know north, south, or east.”*
- *“North County name or 78 corridor name is irrelevant. It is about the action and conditions with a broad and supported plan.”*
- *“Stop competing against each other.”*
- *“San Diego is not known as a business destination.”*
- *“San Diego is a project destination, but a career will be elsewhere...not enough depth for full career is the perception.”*
- *“They need to leverage other parts to develop their approach...don’t fence yourself off from Orange County and Baja talent and entrepreneurship.”*
- *“UCSD in LaJolla should be leveraged...graduates working in North County is a huge engine.”*
- *“It’s a great place for the beach and mountains in the same day.”*
- *“Employees and families all love it here.”*

Understanding Outside Perceptions

BUSINESS DEVELOPMENT AND AWARENESS STUDY

Conducted in:

San Diego County (excluding North County) 202 responses

SDREDC E-mail list 37 responses

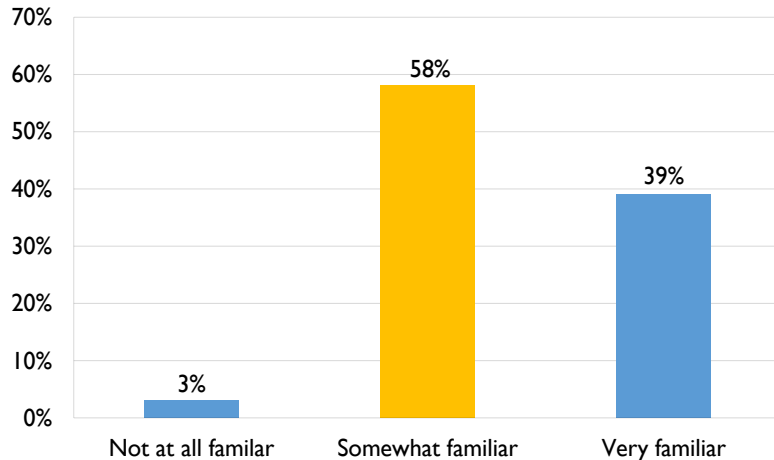
239 total responses

BDAP Study

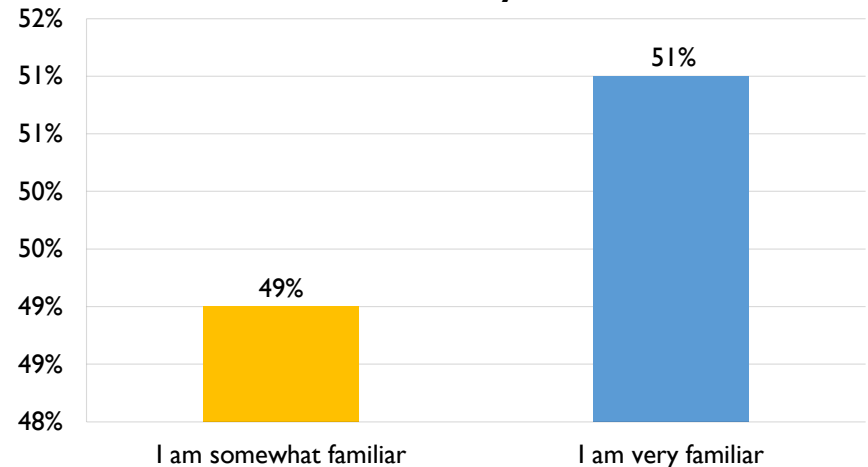
FAMILIARITY WITH NORTH COUNTY

- **Lack of familiarity was the terminating factor for the survey.**
- **Before being shown a map, 39% of respondents were Somewhat Familiar with North County and 39% were Very Familiar with North County.**
- **After being shown a map, 100% of respondents who were previously Not At All Familiar with North County were either Somewhat or Very Familiar.**

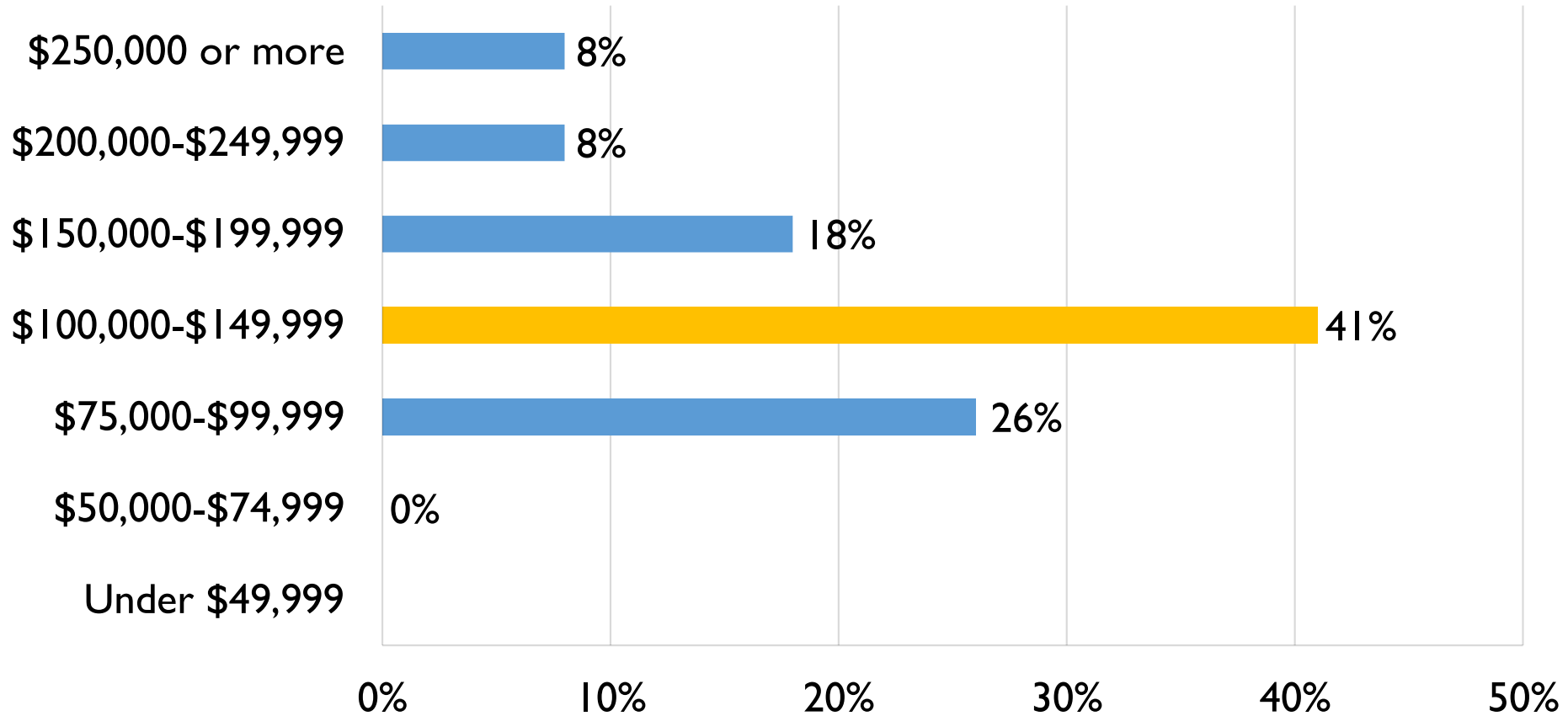
How familiar are you with the North County area of San Diego County?



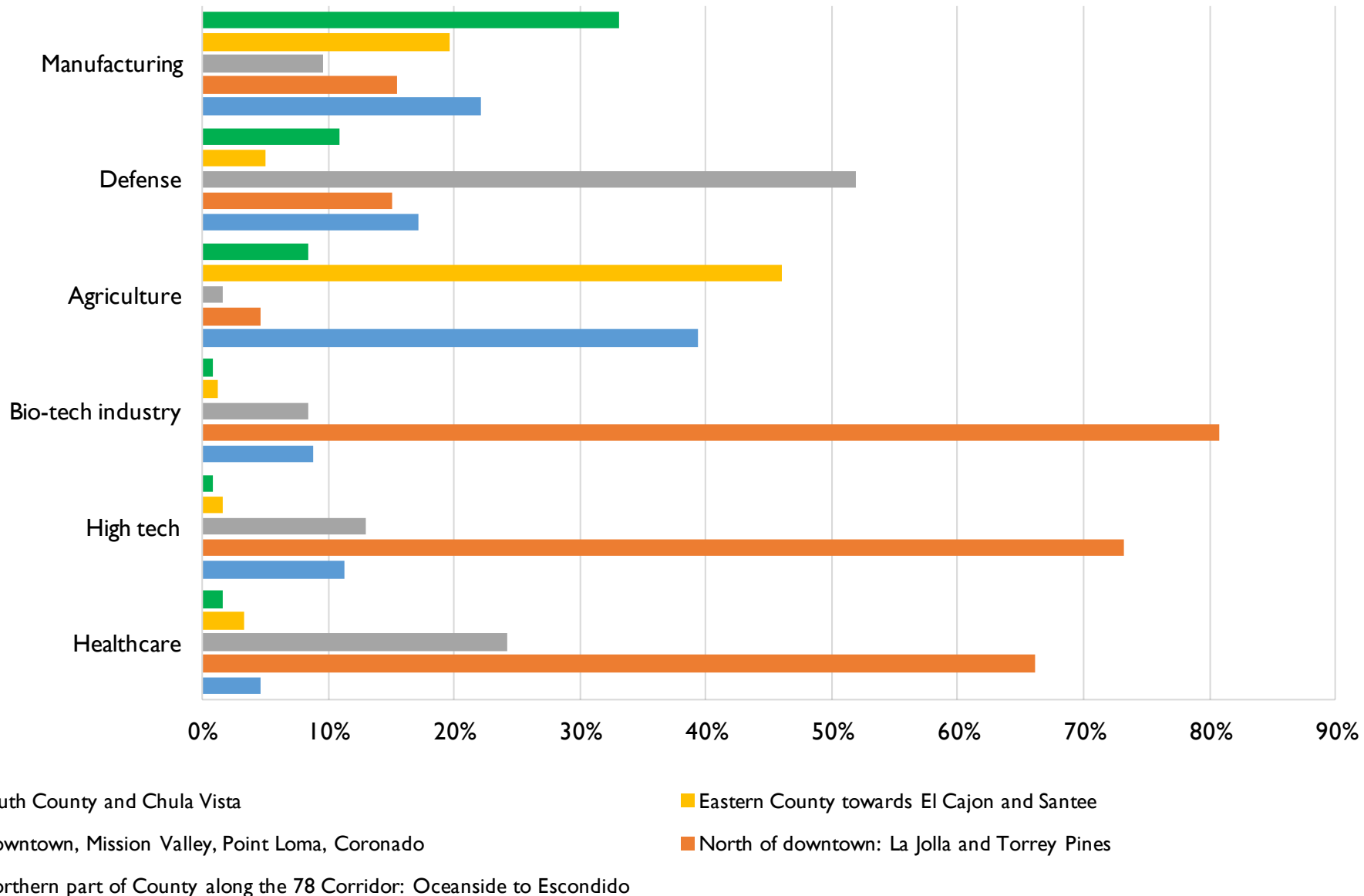
With the map as a guide, please indicate your new familiarity level.



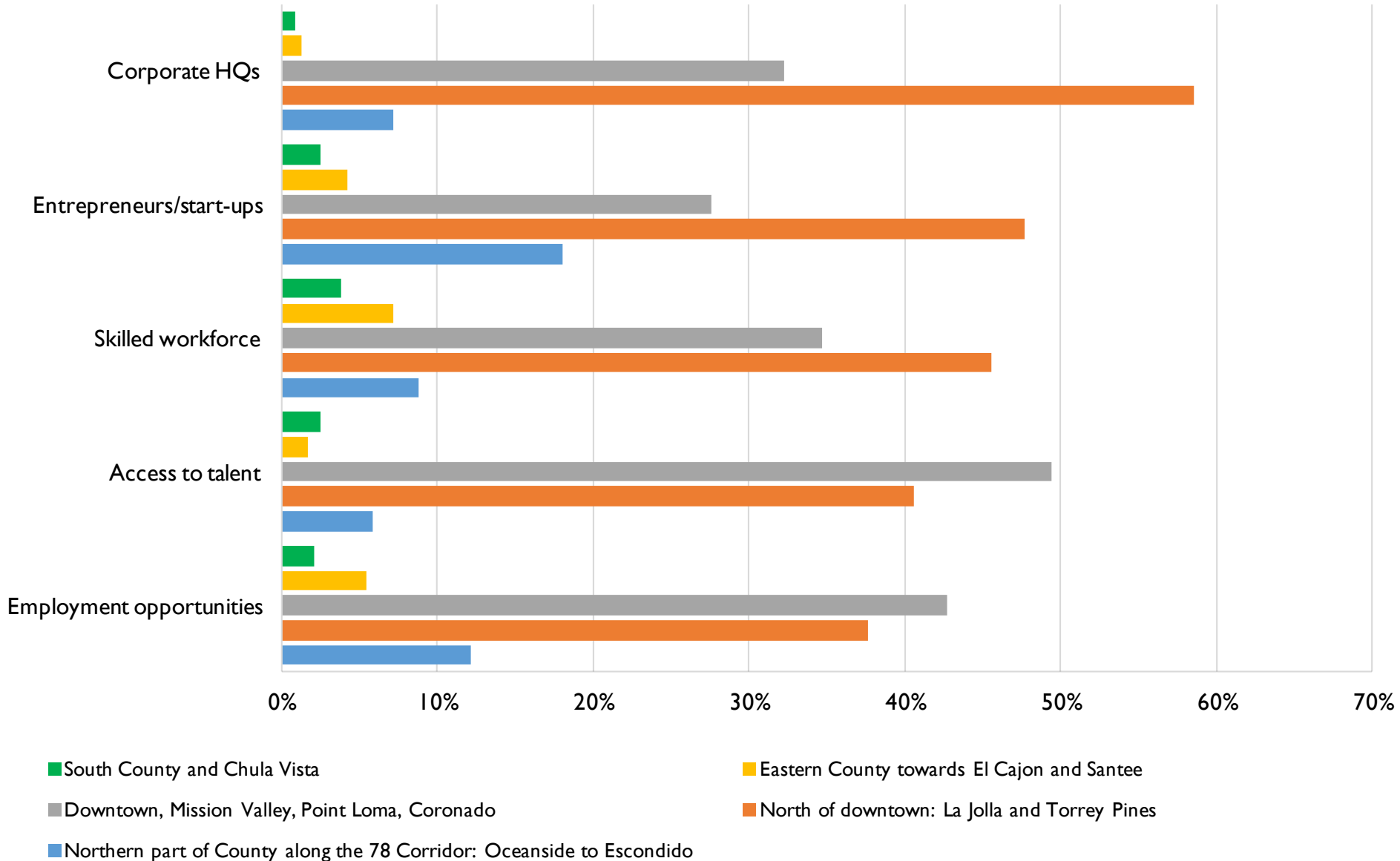
What is your household income?



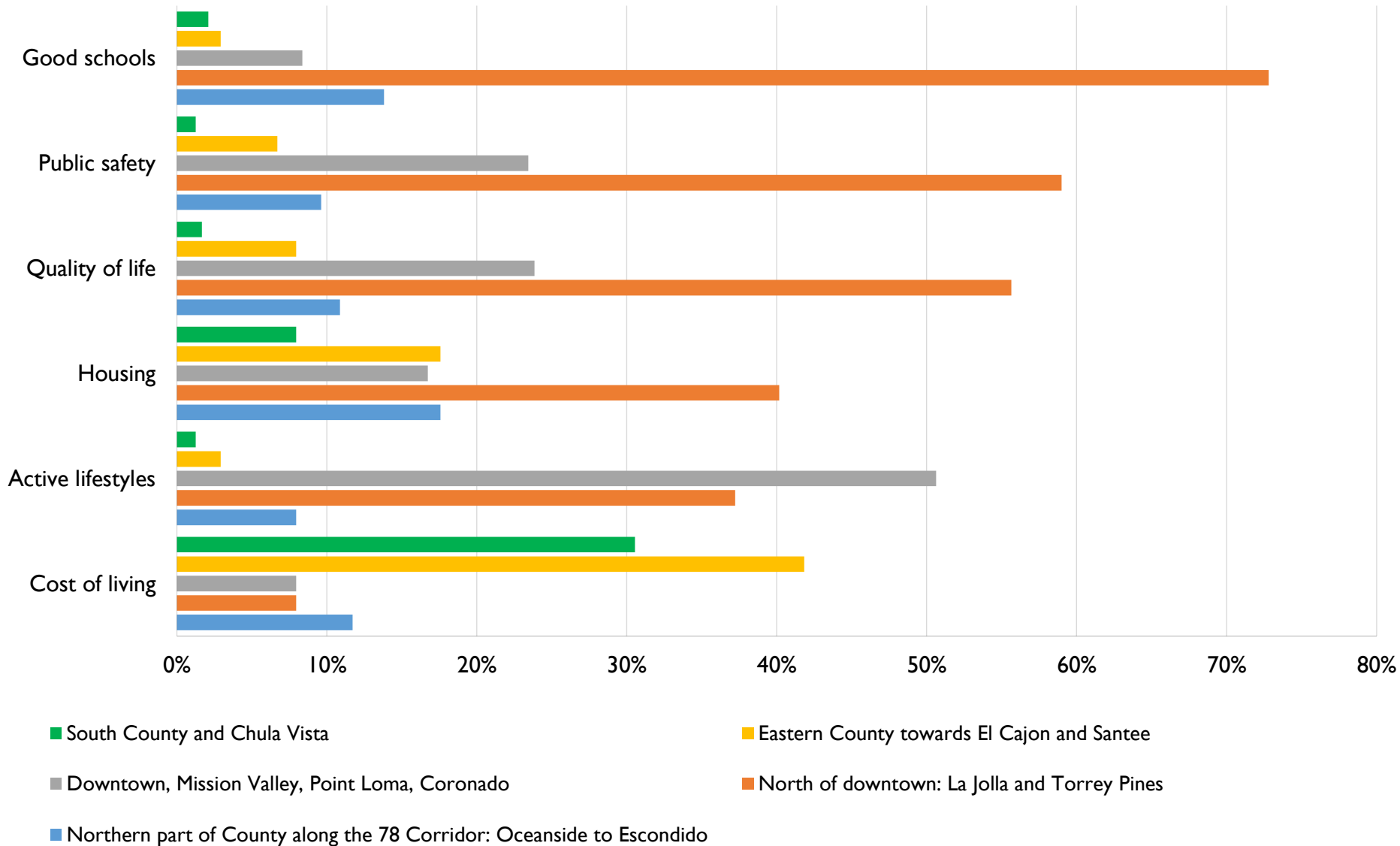
Which part of San Diego County do you consider the best place for the following or the place with the best of the following?



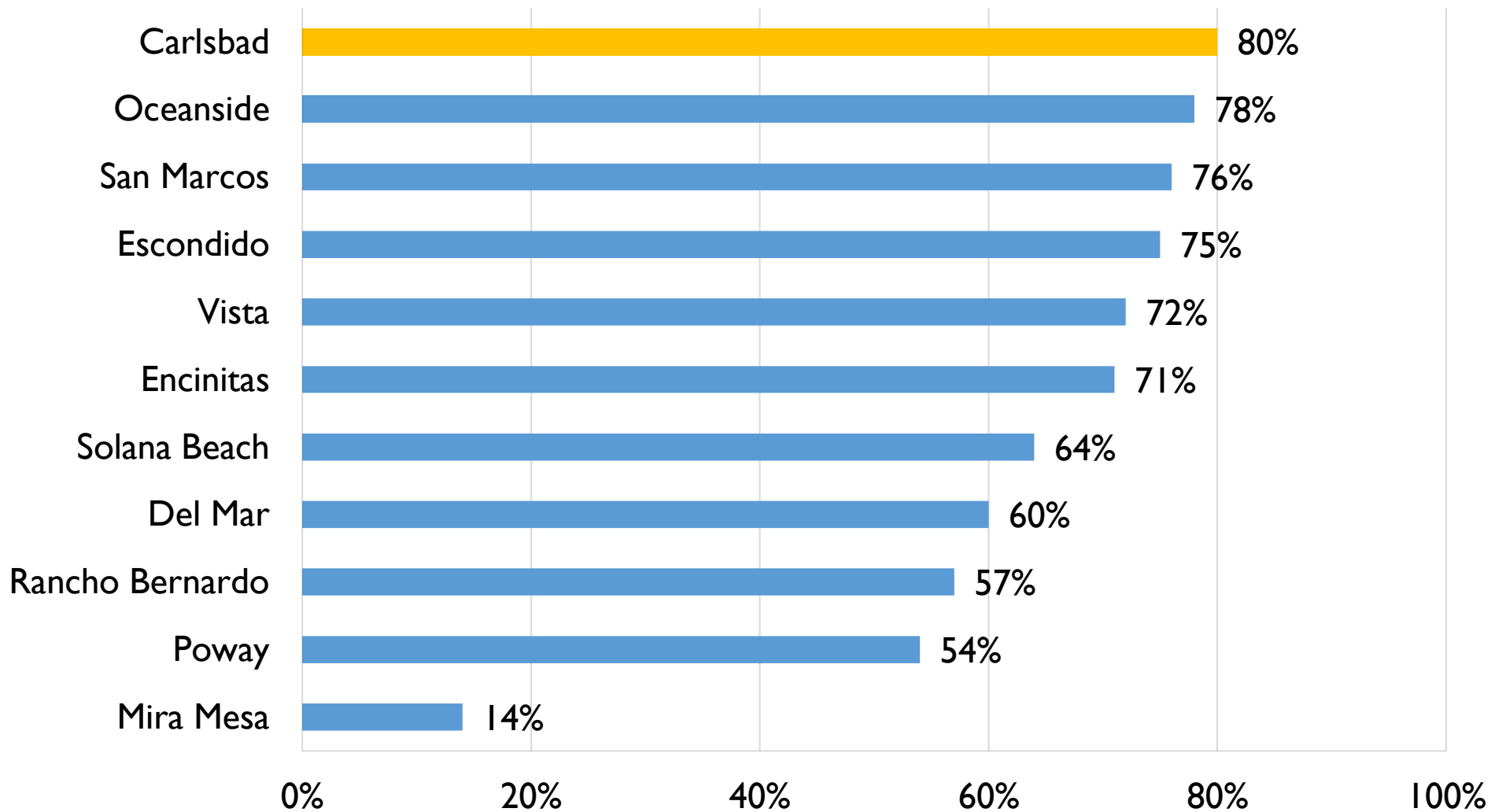
Which part of San Diego County do you consider the best place for the following or the place with the best of the following?



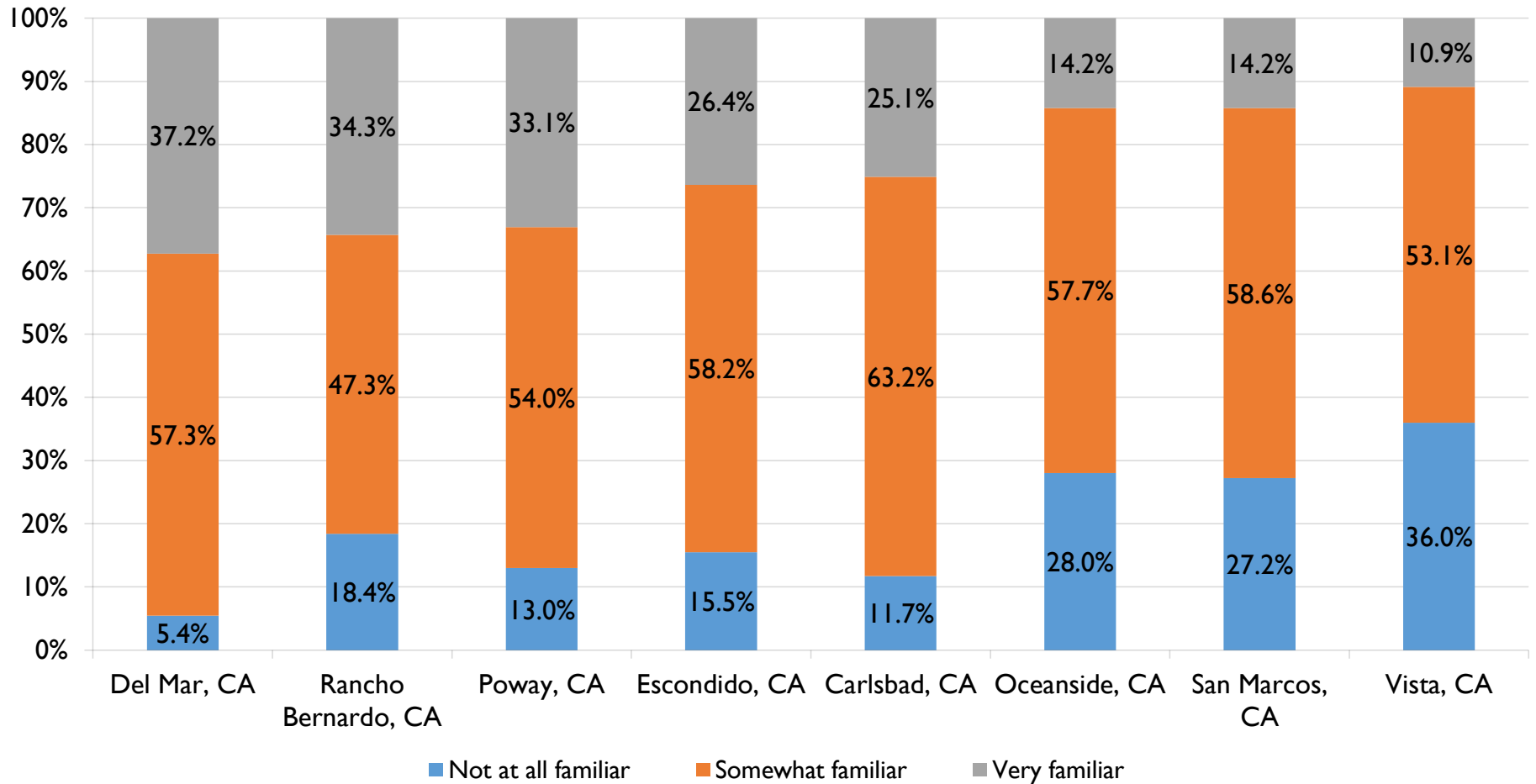
Which part of San Diego County do you consider the best place for the following or the place with the best of the following?



Which communities do you associate with the North County area? Choose all that apply.



How familiar are you with the following communities?



BDAP Study

NEIGHBORING COMMUNITY PERCEPTIONS

When you think of North County and the following communities, what comes to mind?

Carlsbad

- Beach / coastal
- Shopping

Oceanside

- Military / Marines
- Beach / water

Vista

- Inland
- Courthouse

San Marcos

- Schools
- Retail and restaurants

Escondido

- Agriculture
- Shopping

Del Mar

- Racetrack
- Beach

Rancho Bernardo

- Retirement / seniors
- Good place to live

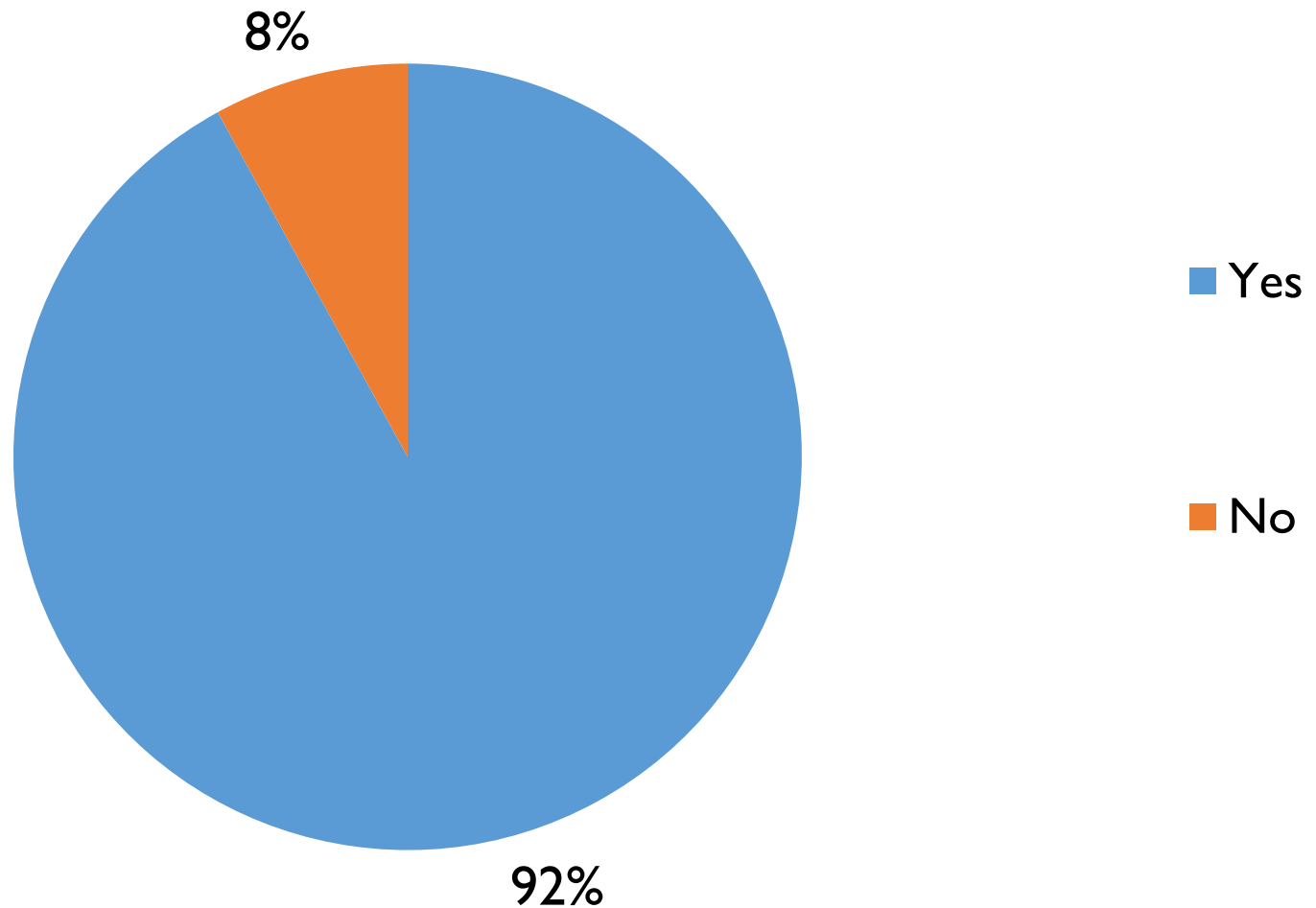
Poway

- Schools / education
- Rural

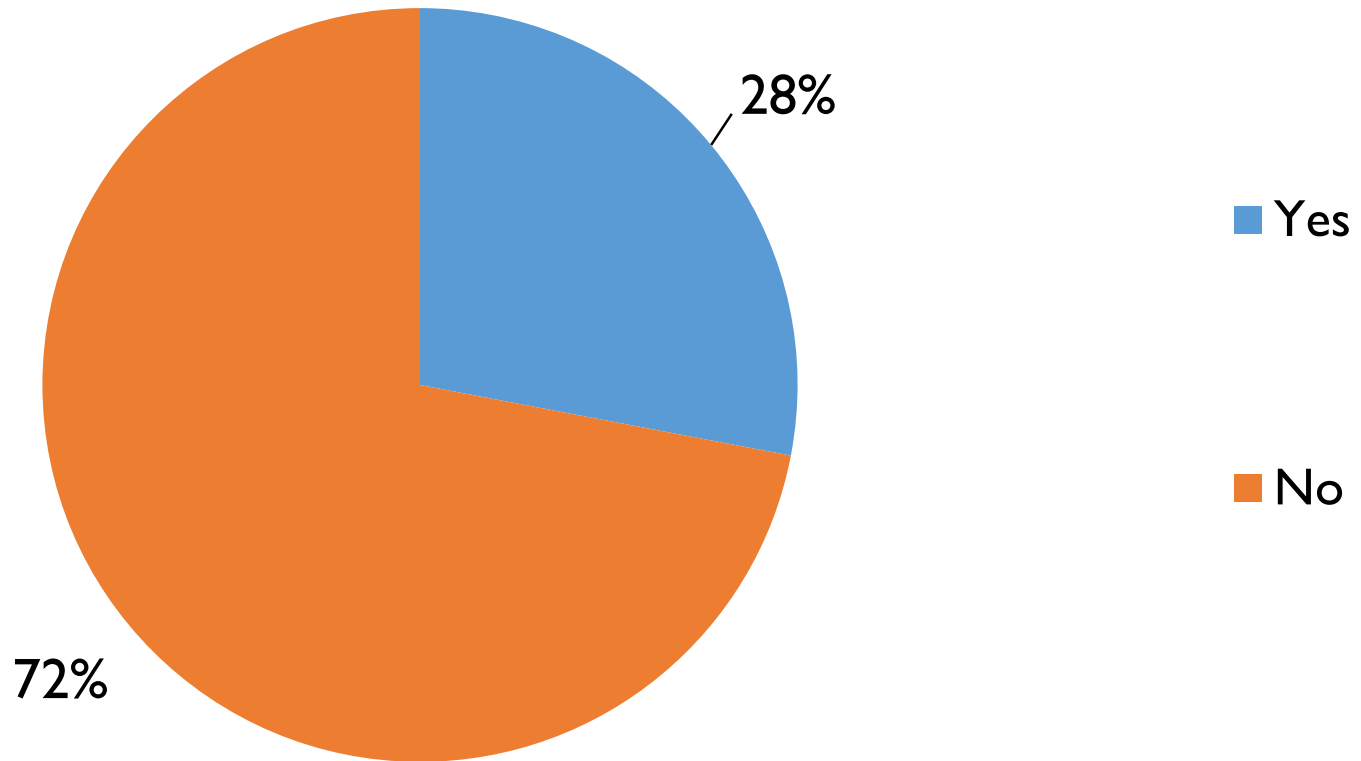
North County

- Home, suburbia
- Beaches
- Traffic, commute

Have you ever traveled Highway 78 in northern San Diego County?

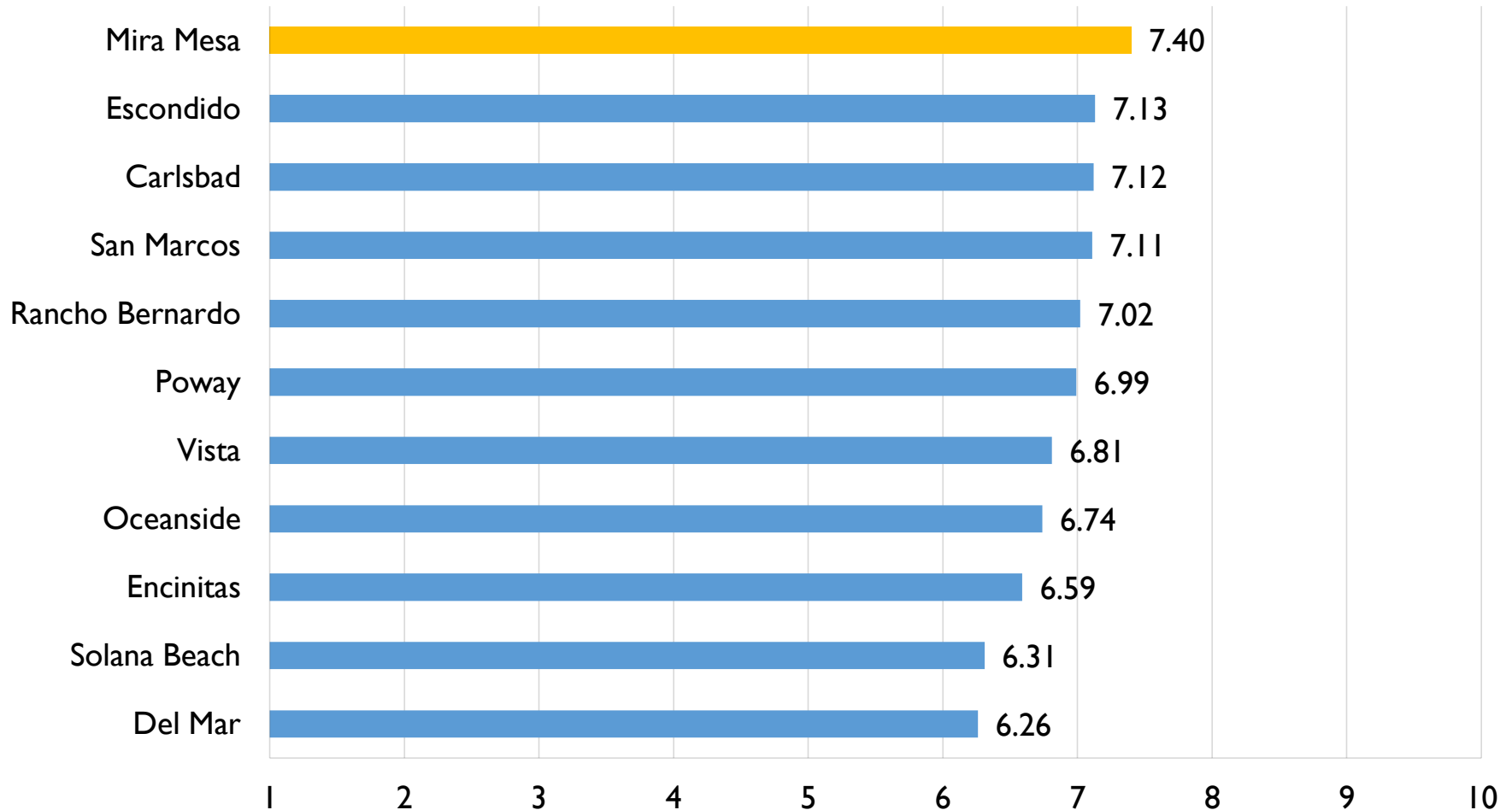


Have you ever used the North County Transit District Sprinter or Coaster trains?

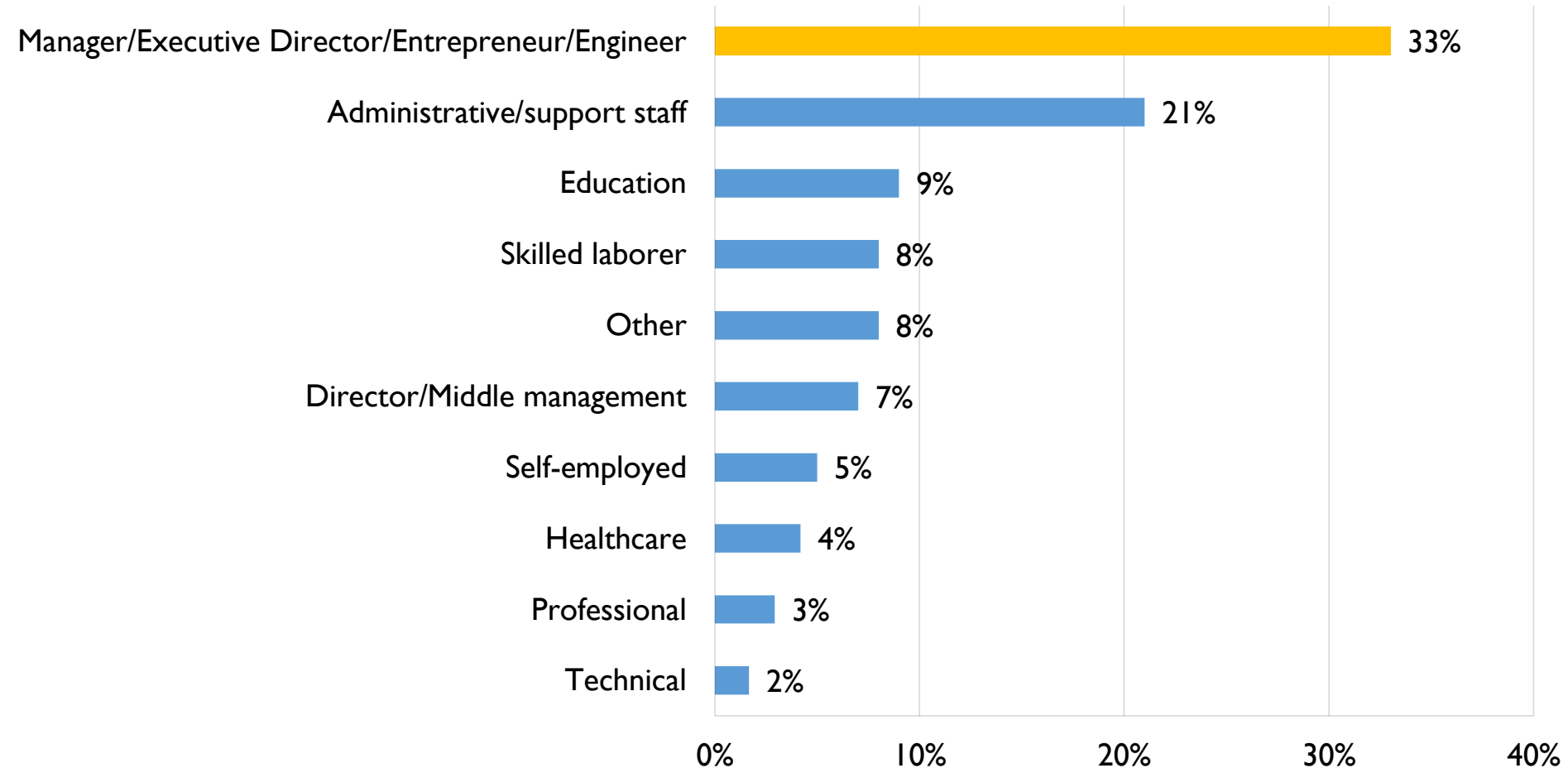


**Please rate the following on how business friendly you perceive
or know the community to be.**

Where 1 is "not at all" and 10 is "extremely."

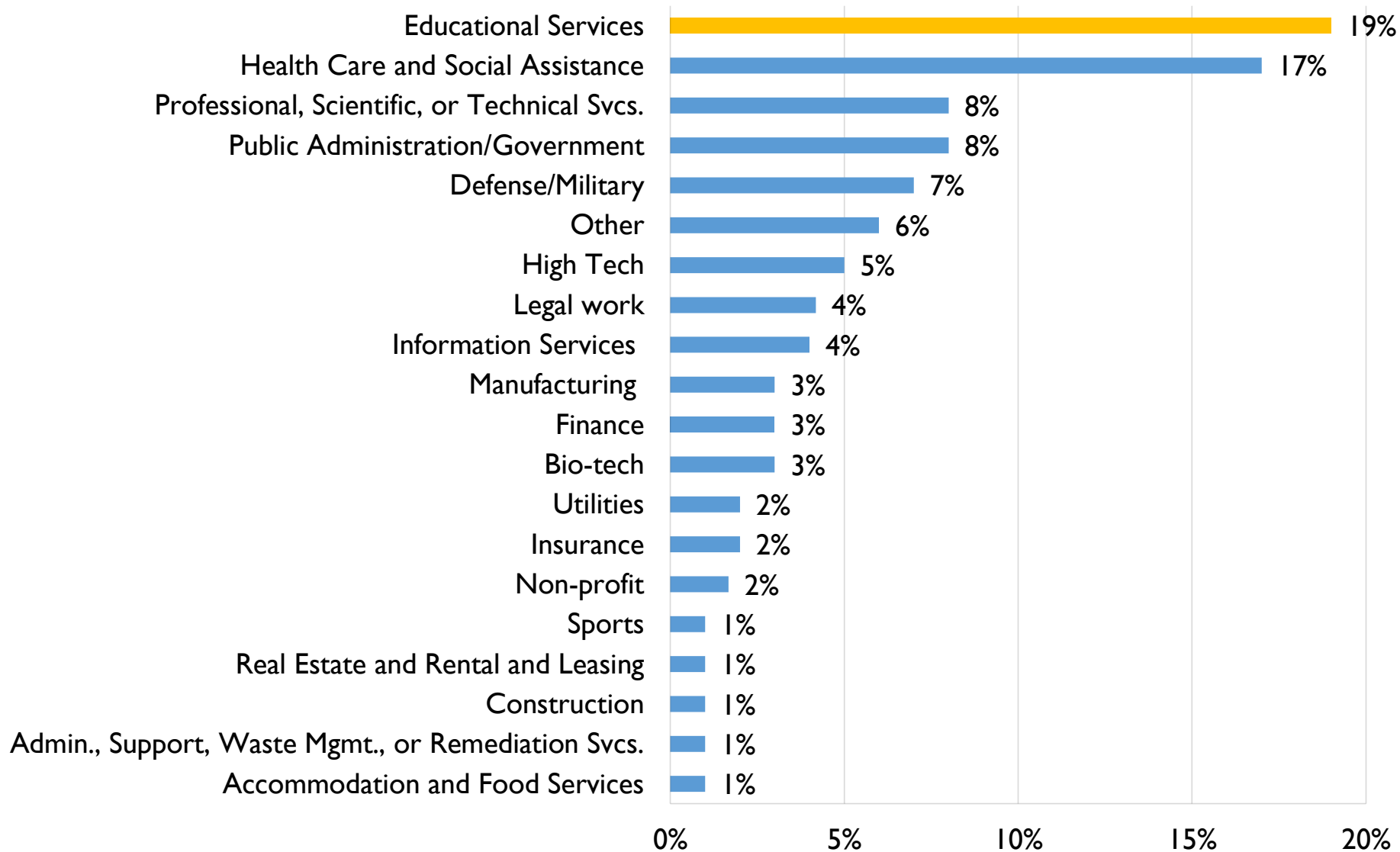


Which of the following best describes your professional position?



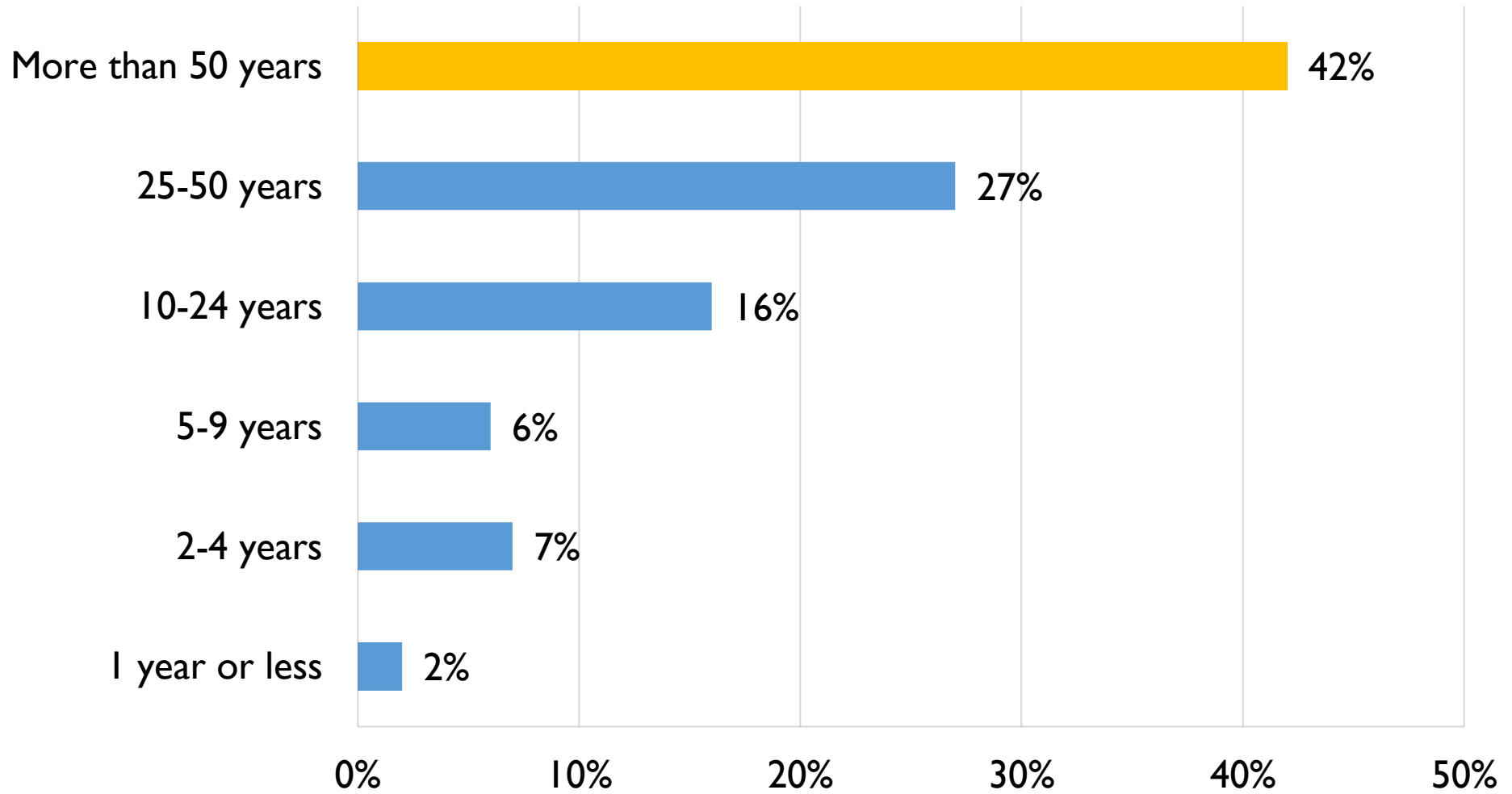
Other: Attorney, consultant, real estate agent

Select the option which best describes your primary industry.

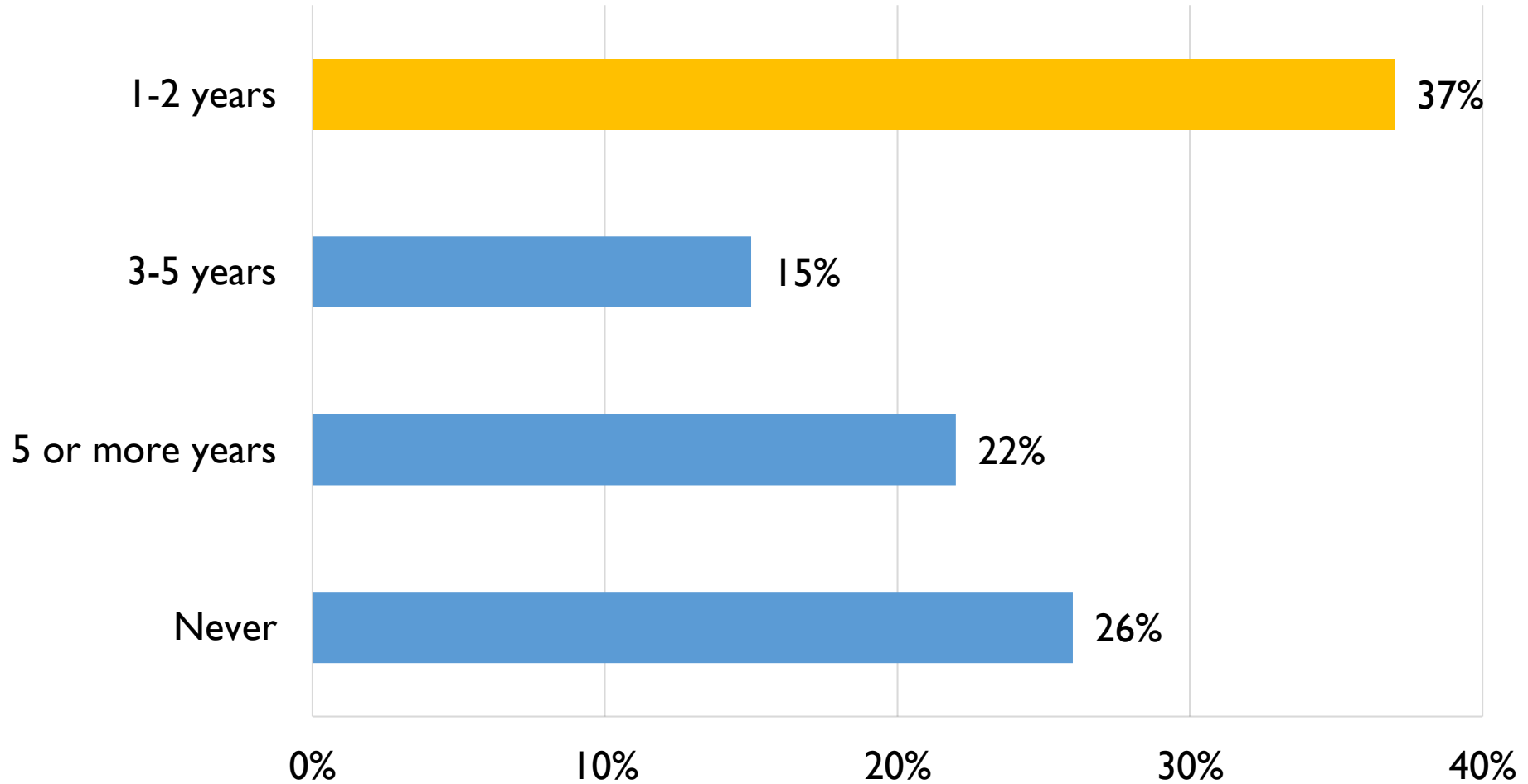


Other: Aerospace, public relations

How many years has your organization been in business?

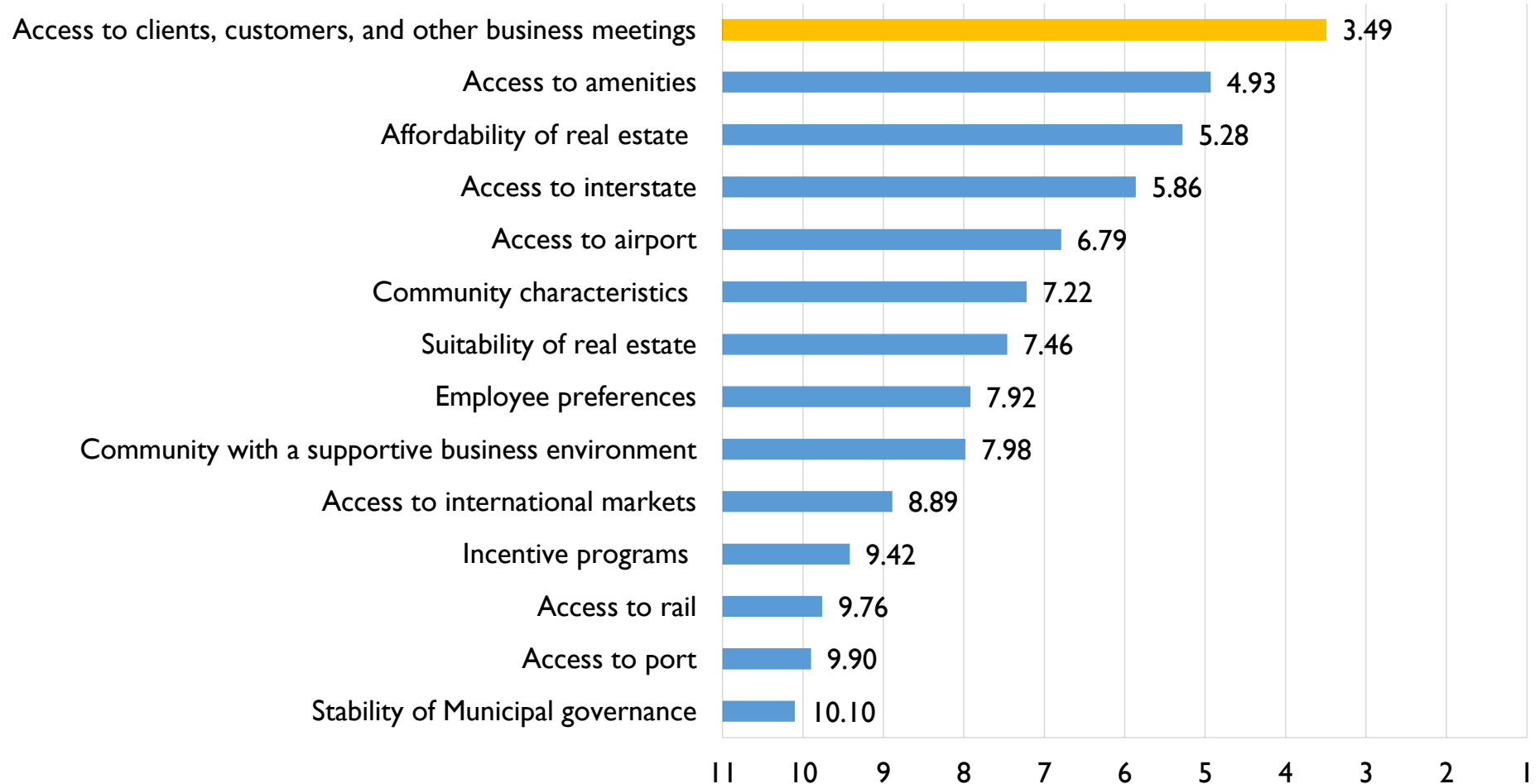


When did your organization last look for a location to relocate or expand the business?

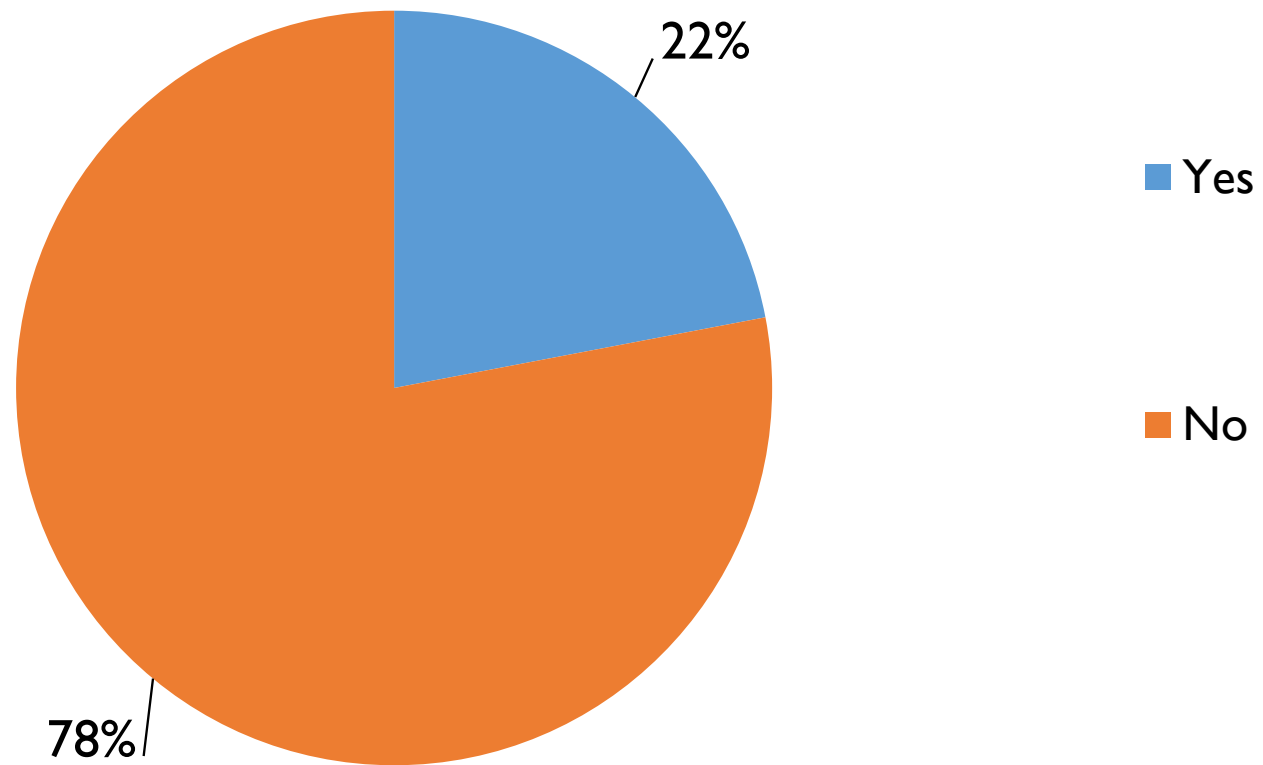


Rank the following criteria used in the site selection process for your organization in order of importance.

Where 1 is "most important."

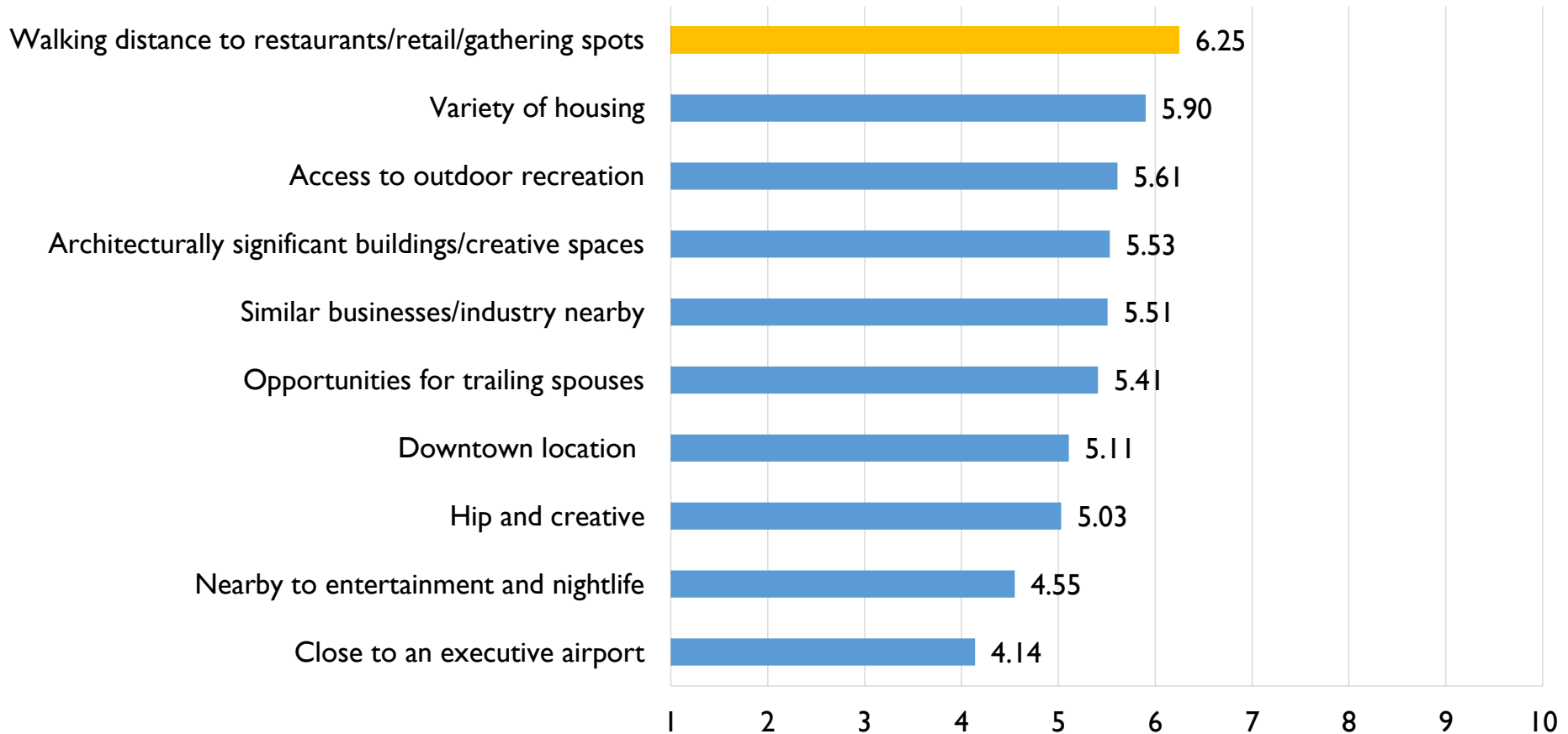


Are you or would you be involved in conversations and/or decisions about business expansion or relocation for your organization?

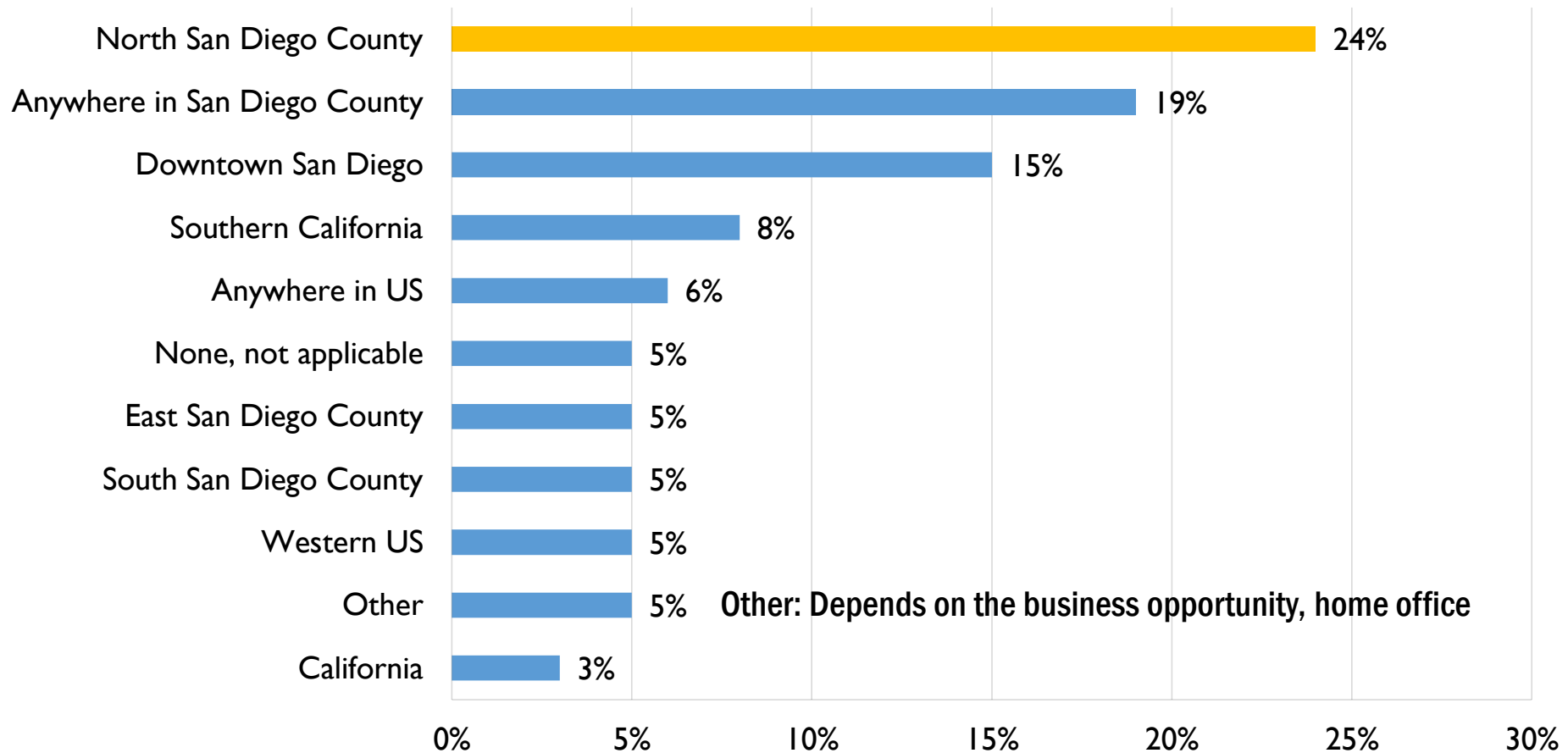


How important are the following to the preferred work environment for you and fellow employees?

Where 1 is "not at all important" and 10 is "extremely important."



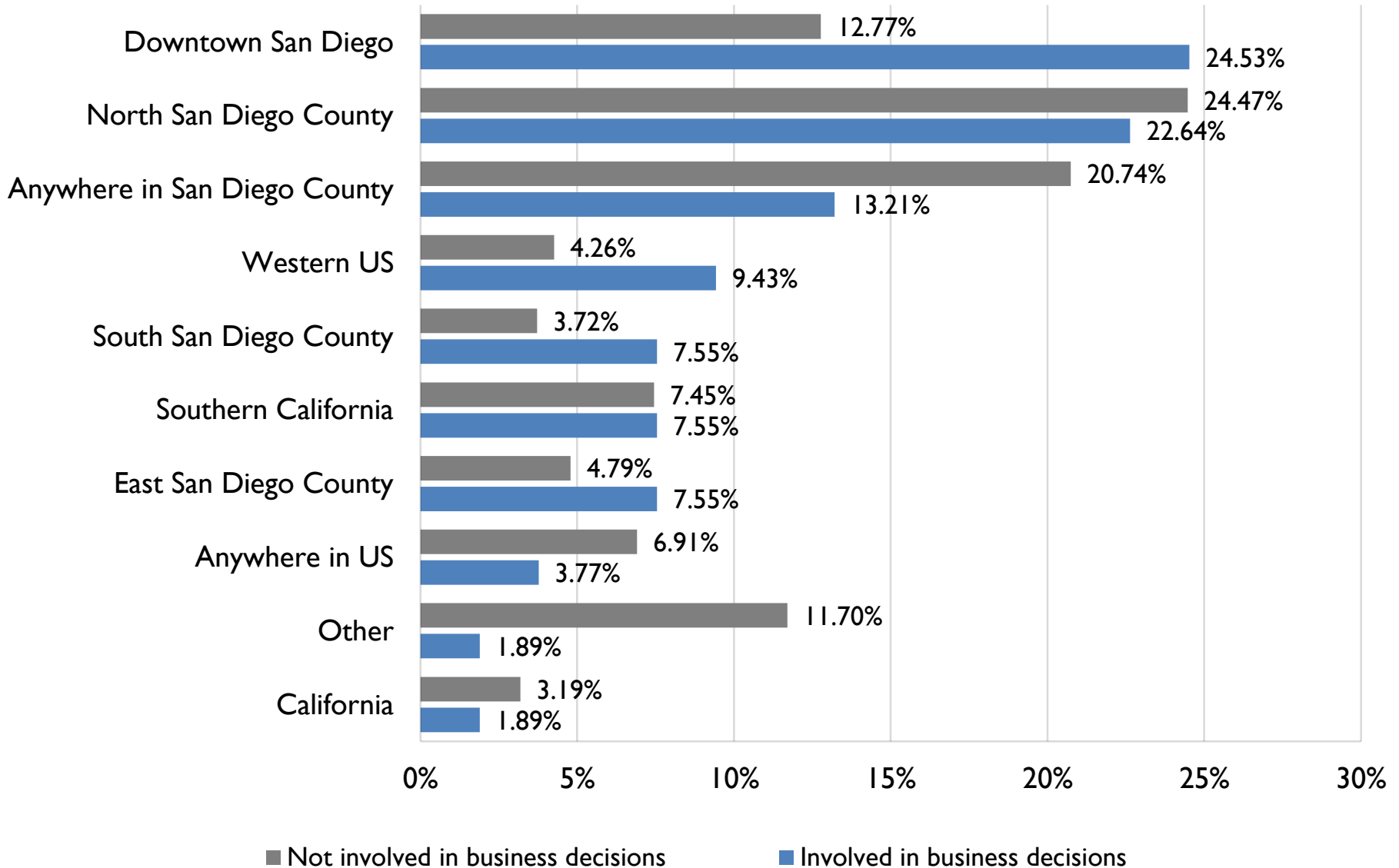
**When you are ready to expand or relocate your business, would you mainly look in San Diego County or outside of Southern California?
Which of the following reflects your expected area of focus?**



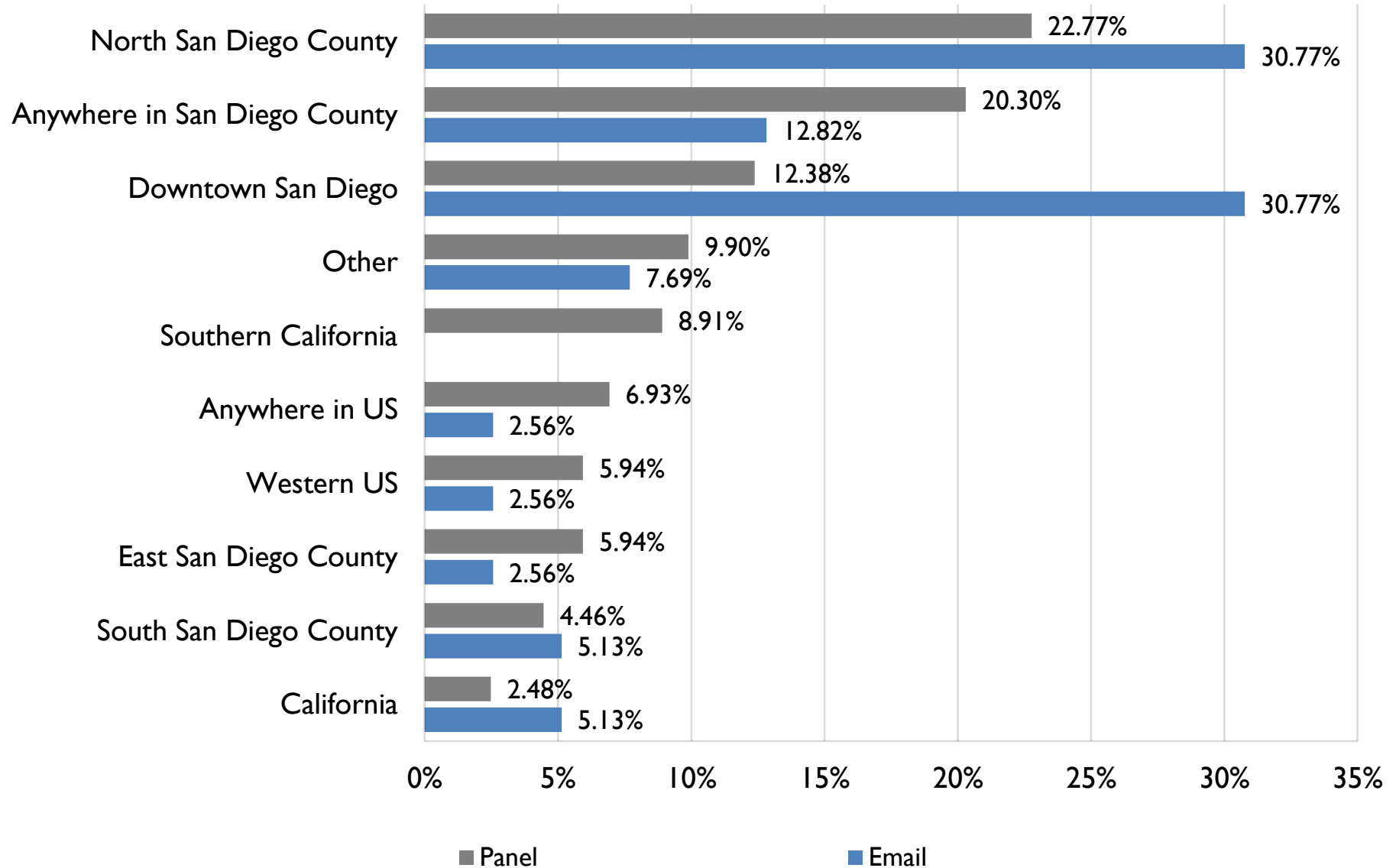
List cities you have looked or plan to look at when you are ready to expand or relocate. Please write N/A if you do not expect to expand or relocate.

- Not applicable (majority), San Diego, Vista

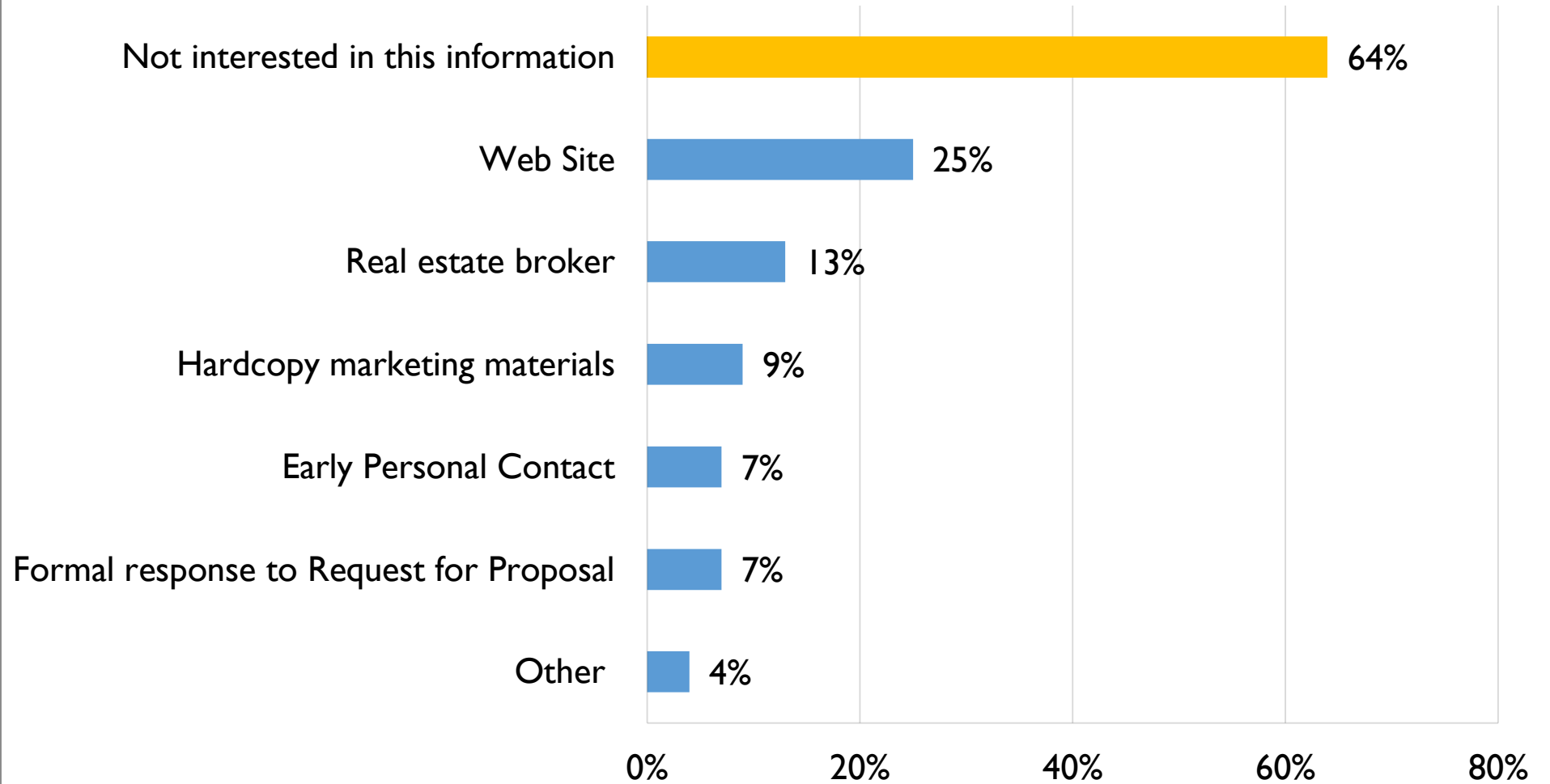
When you are ready to expand or relocate your business, would you mainly look in San Diego County or outside of Southern CA? Which of the following reflects your expected area of focus?



When you are ready to expand or relocate your business, would you mainly look in San Diego County or outside of Southern CA? Which of the following reflects your expected area of focus?

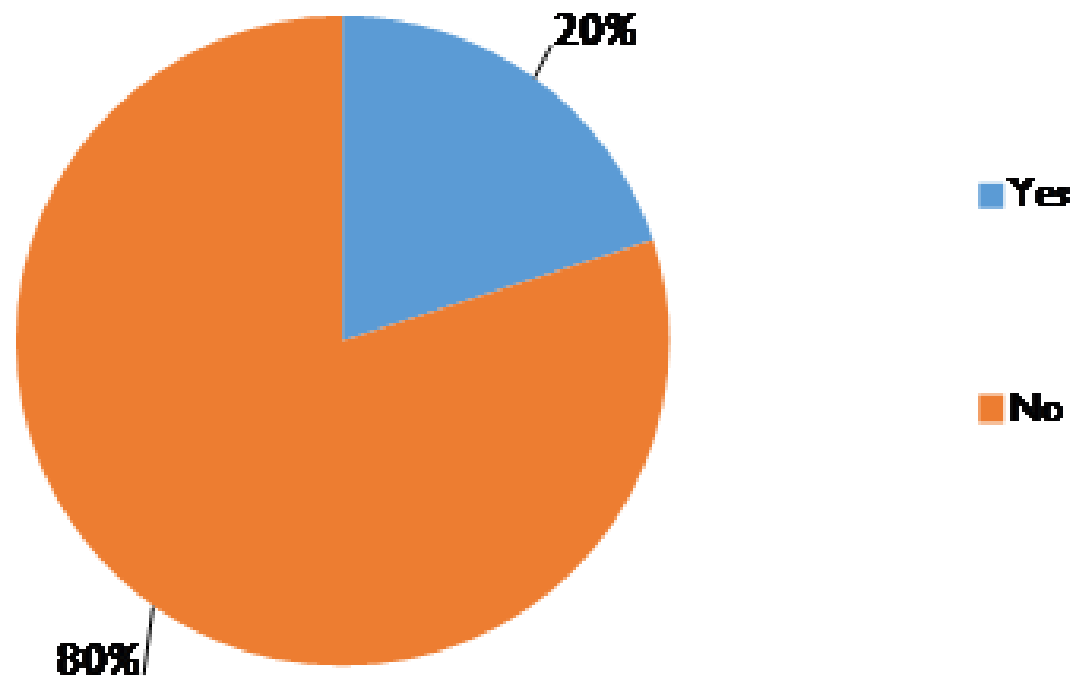


How would you prefer to receive information about an area that you might relocate to? Choose all that apply.



Other: E-mail

Have you ever used the McClellan-Palomar executive airport in Carlsbad?



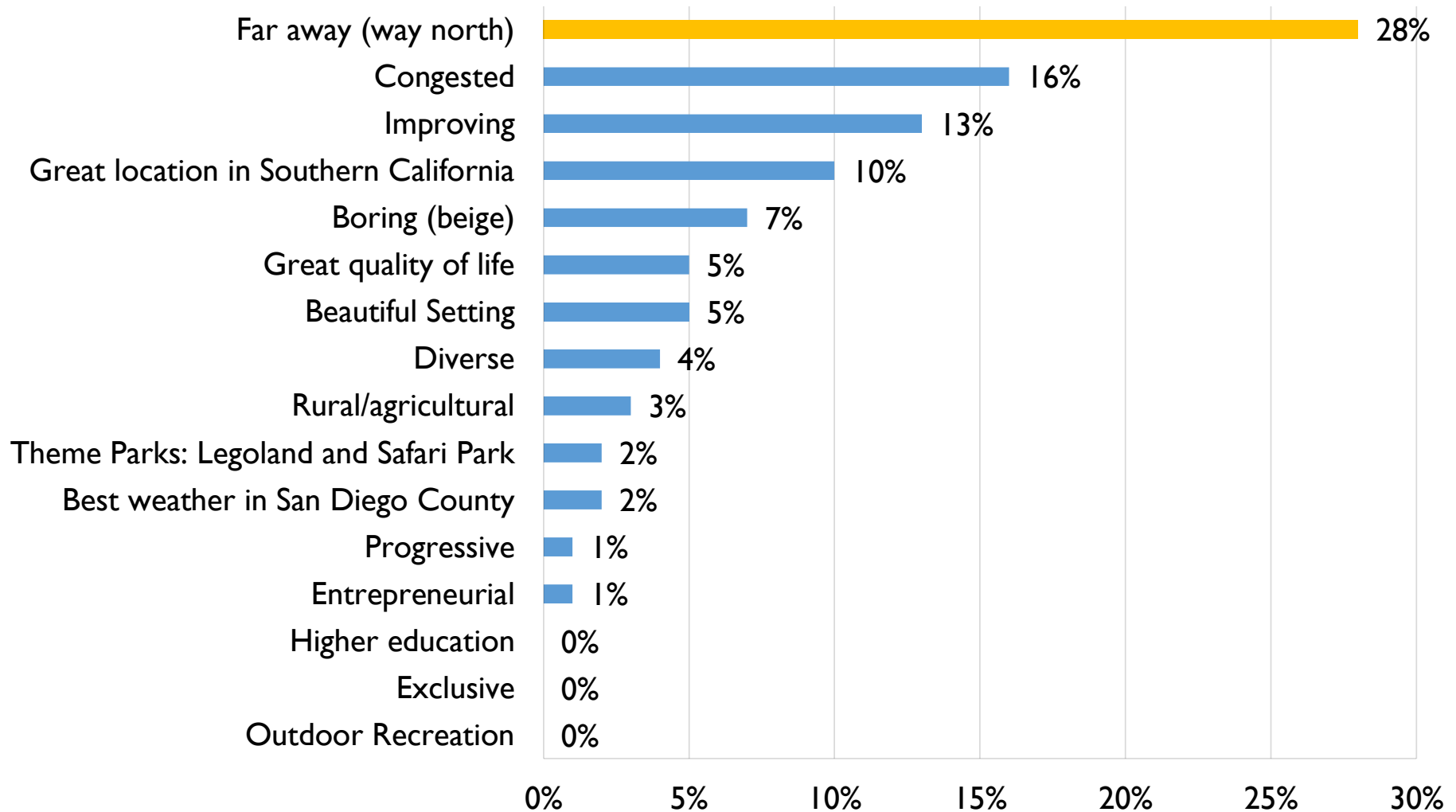
BDAP Study

TOP OF MIND

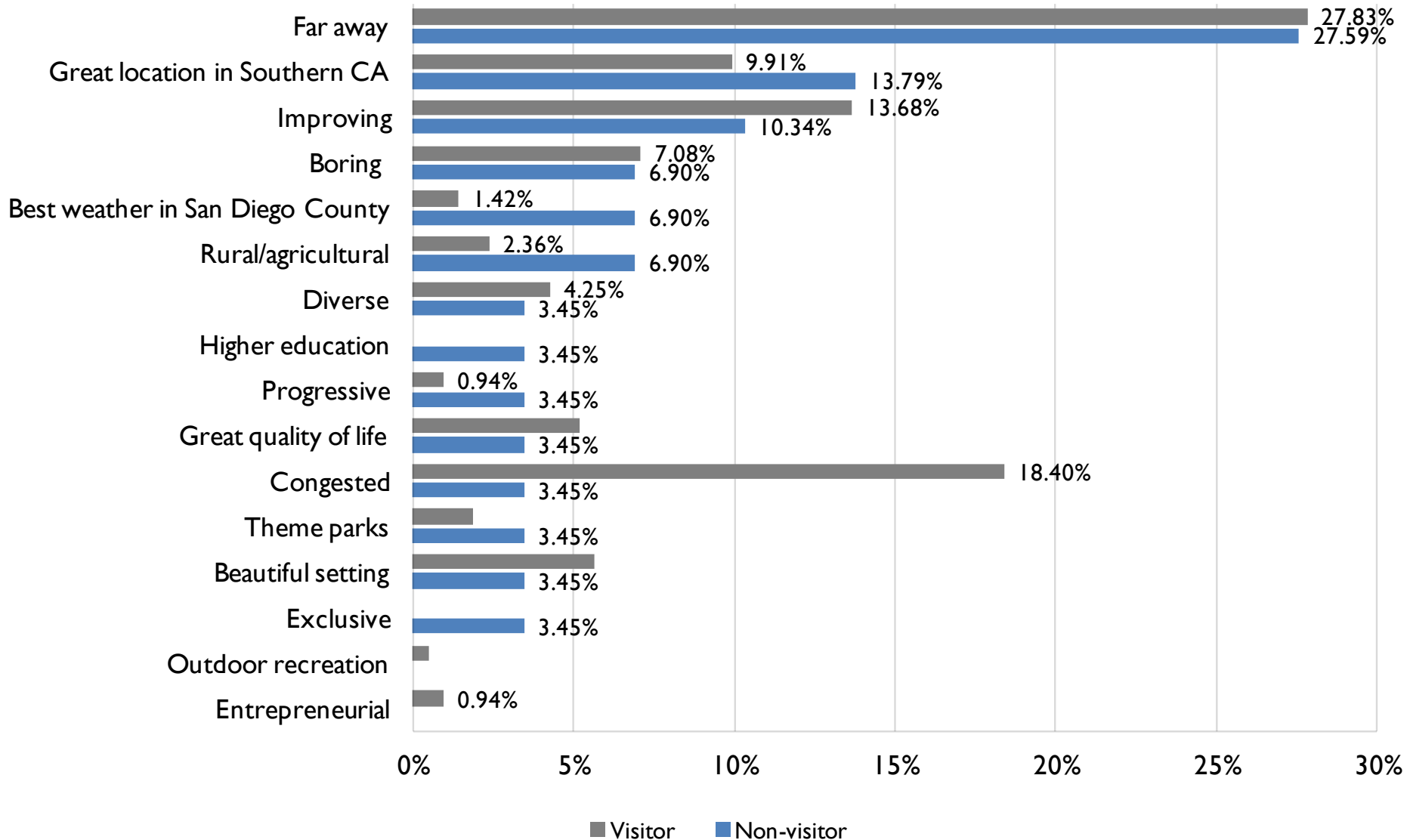
What would make you more likely to use the McClellan-Palomar Airport in Carlsbad?

- Nothing
- Affordability
 - *“Affordable parking and affordable flights.”*
- More flights
 - *“If there were more commercial flights.”*
 - *“More airline options.”*
- Location
 - *“It needs to be closer to me than SAN.”*
 - *“If I lived closer.”*

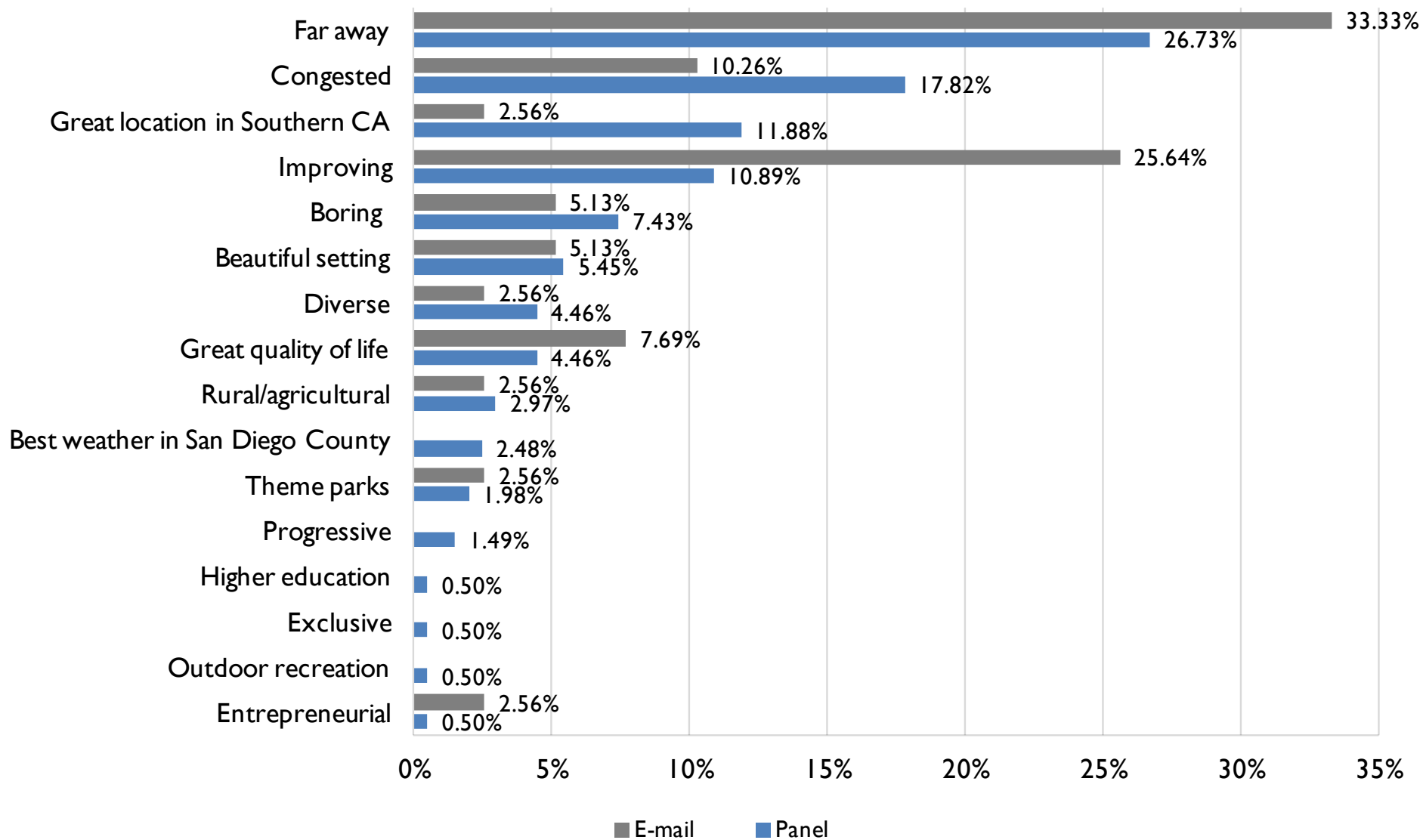
What phrase or adjective best describes, as a whole, the 5 communities of North County along Highway 78?



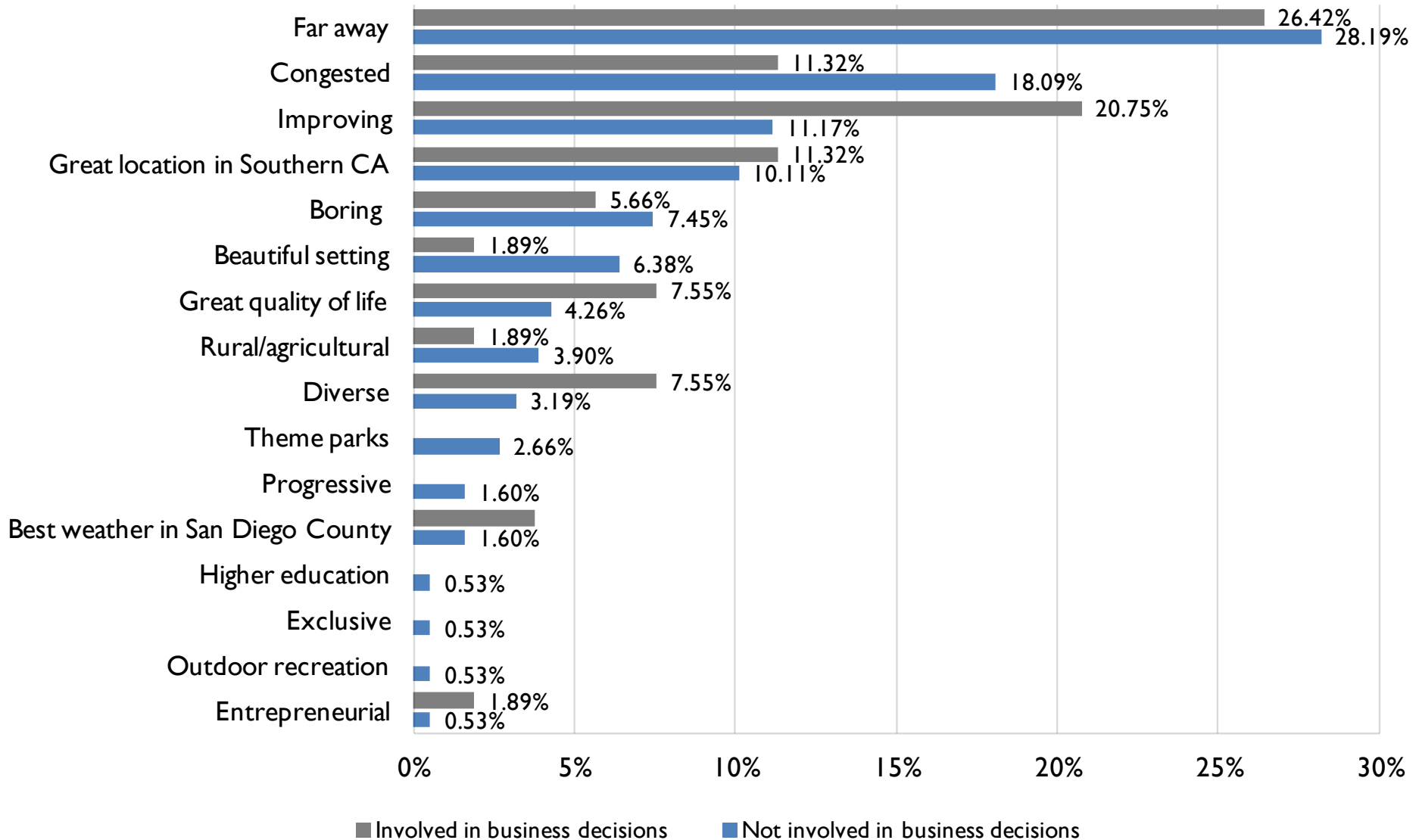
What phrase or adjective best describes (as a whole) the 5 communities of North County along Highway 78?



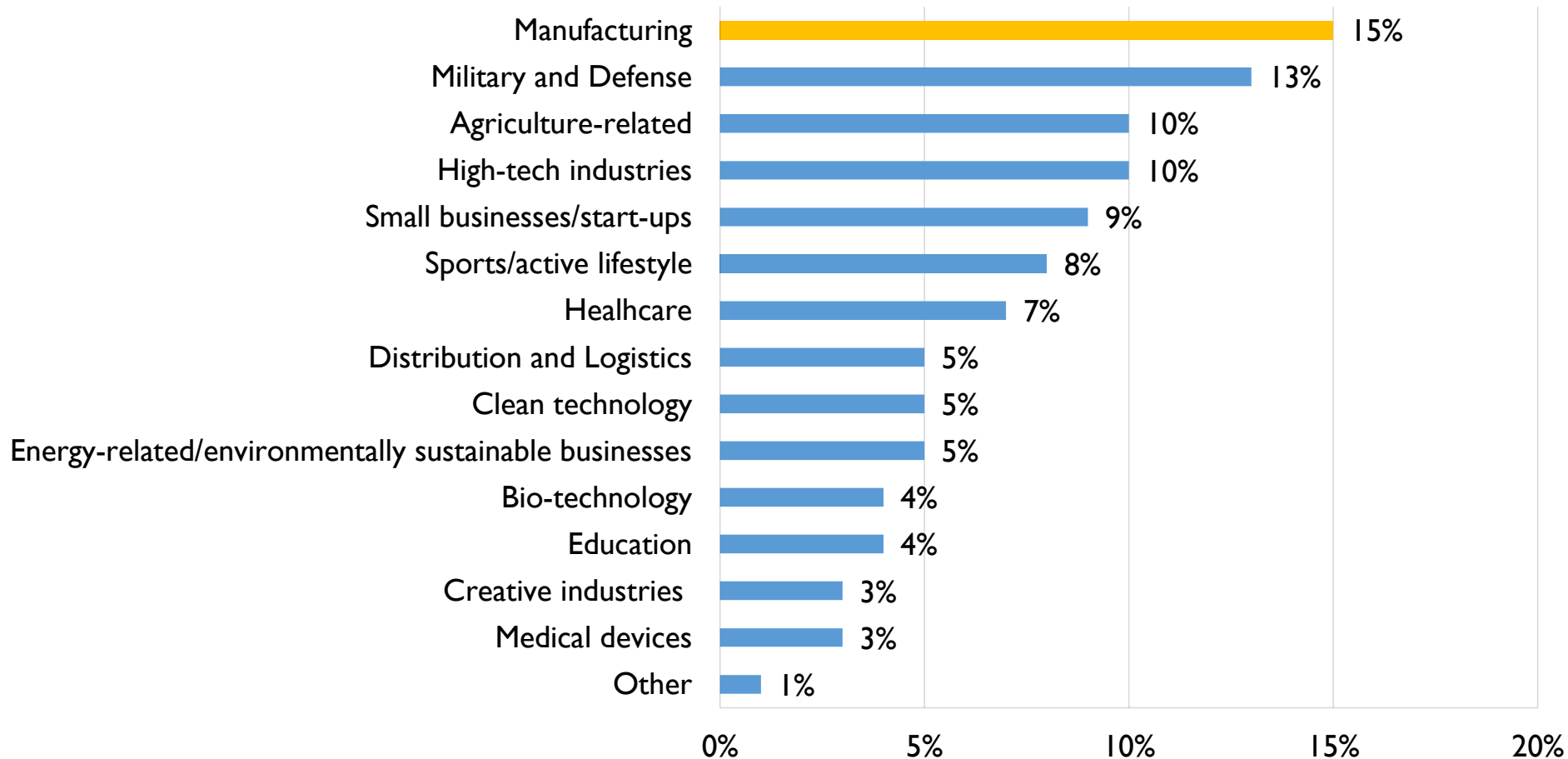
What phrase or adjective best describes (as a whole) the 5 communities of North County along Highway 78?



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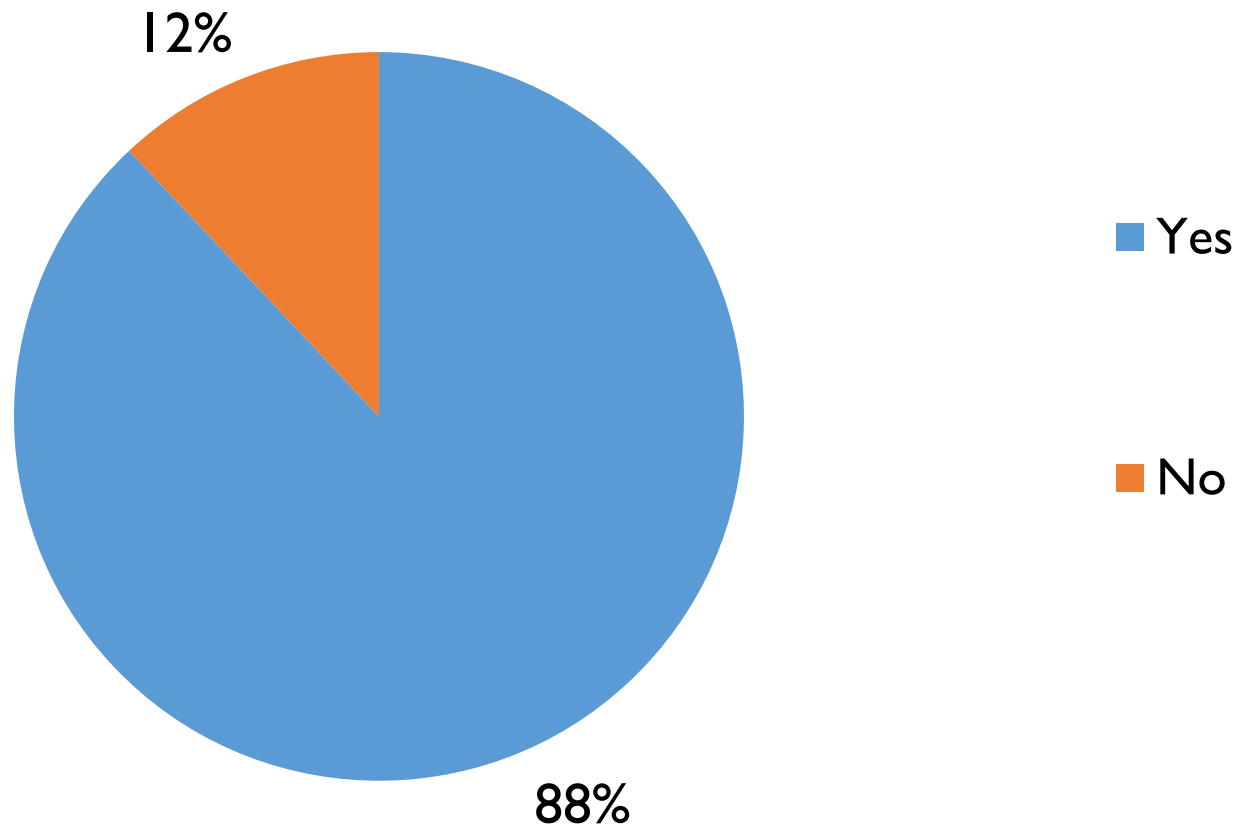


Based on your perceptions of North County, which of the following businesses or industries would be best suited for the area?

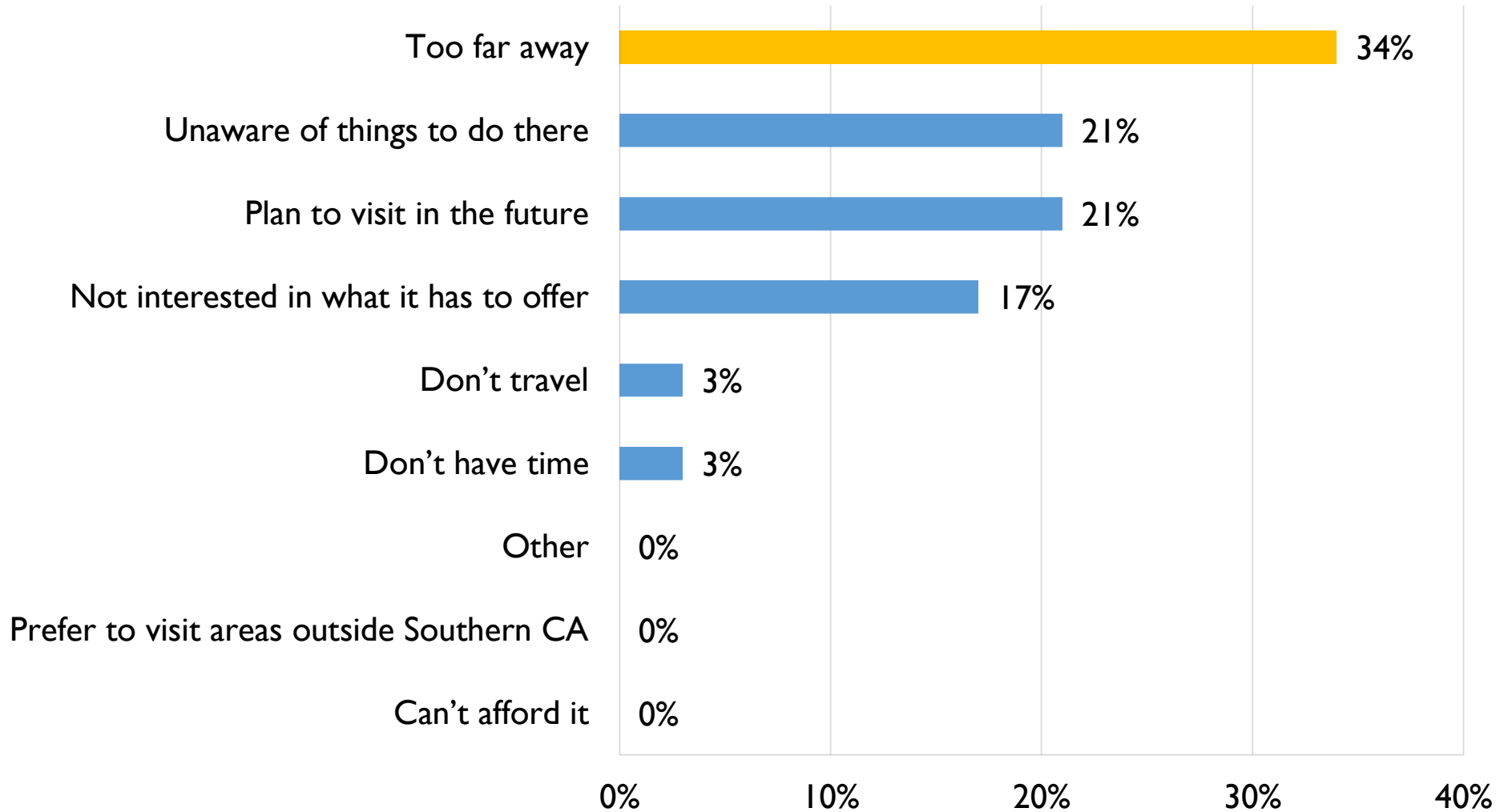


Other: No opinion

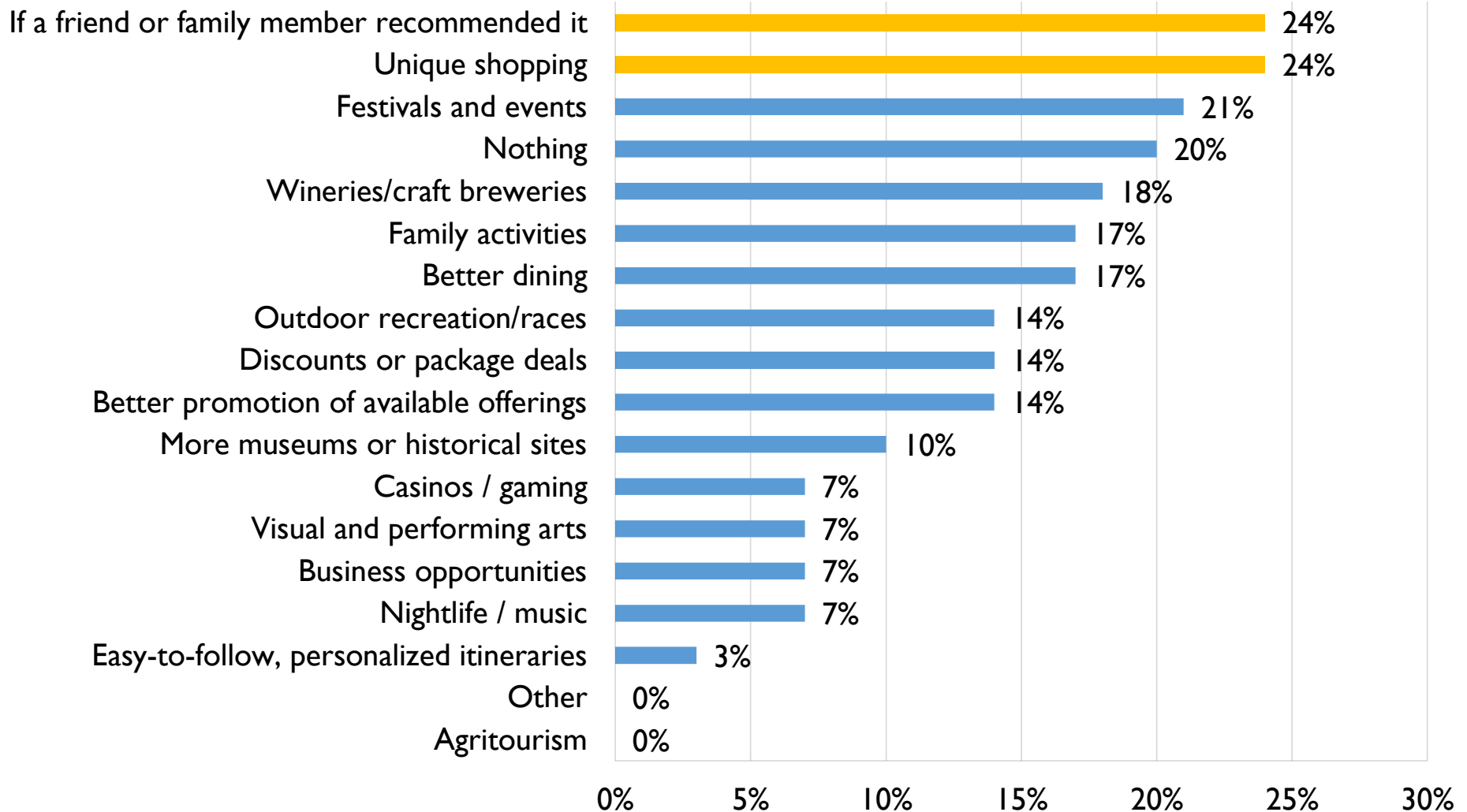
Have you ever visited the communities of North County along Highway 78?



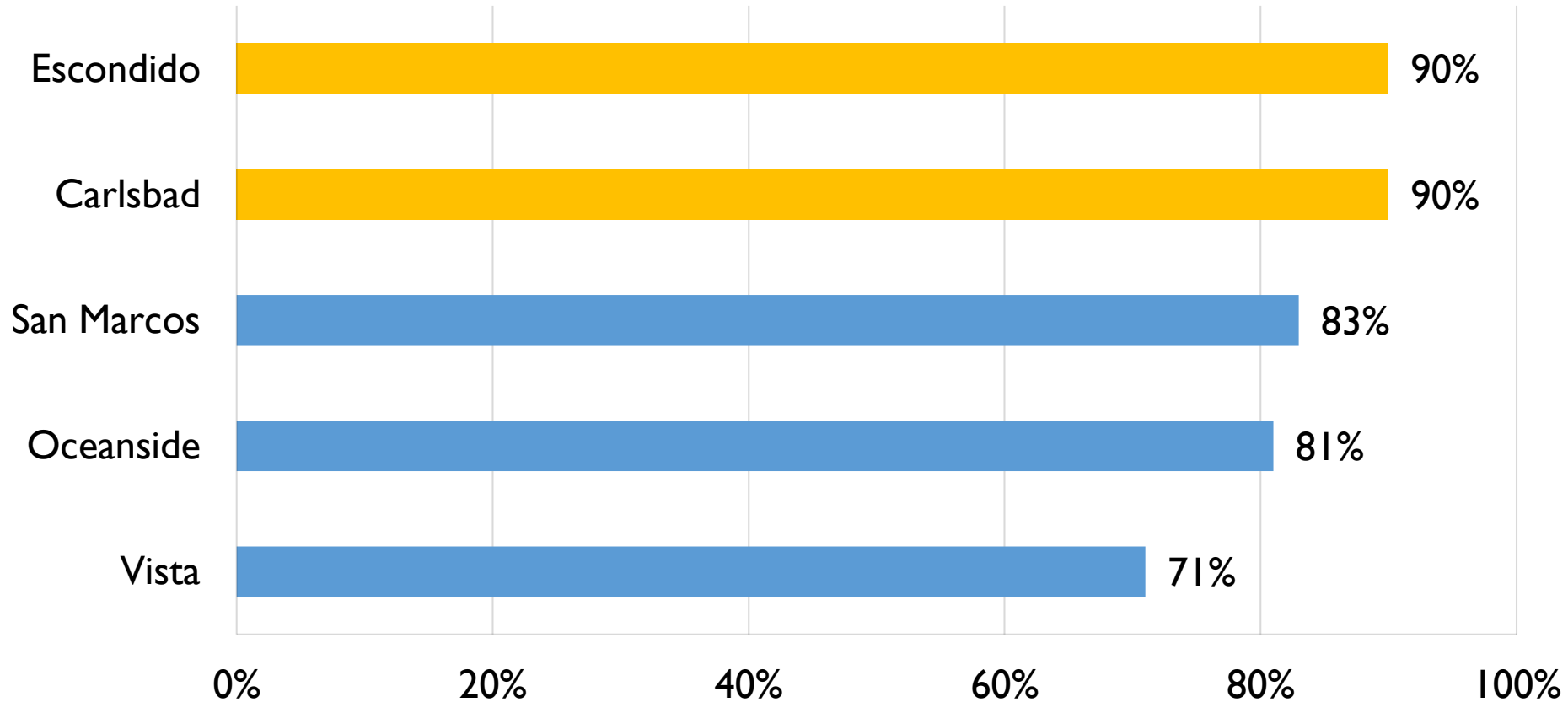
Why have you NOT visited North County?



What would make you more likely to visit North County? Choose all that apply.



Which North County communities have you visited?



What was the primary purpose of your trip?



Other: Leisure, home shopping

BDAP Study

TRIP ACTIVITY FOLLOW-UP

You mentioned your primary trip purpose was business. Which community were you in for your business trip?

- Vista
- San Marcos
- Carlsbad

You mentioned your primary trip purpose was attending a special event. What event did you attend?

- San Diego Botanical Gardens
- Athletic event at college/university
- Wild Animal Park

You mentioned your primary trip purpose was outdoor recreation. Which community were you in for outdoor recreation?

- Carlsbad
- Oceanside

BDAP Study

TRIP ACTIVITY FOLLOW-UP

You mentioned your primary trip purpose was visiting a theme park. Which theme park did you visit?

- Legoland
- Safari Park

You mentioned your primary trip purpose was shopping. Which community did you shop in?

- Carlsbad
- Escondido
- San Marcos

You mentioned your primary trip purpose was arts and culture. What event or site were you at for arts and culture?

- Escondido Center for the Arts

BDAP Study

TRIP ACTIVITY FOLLOW-UP

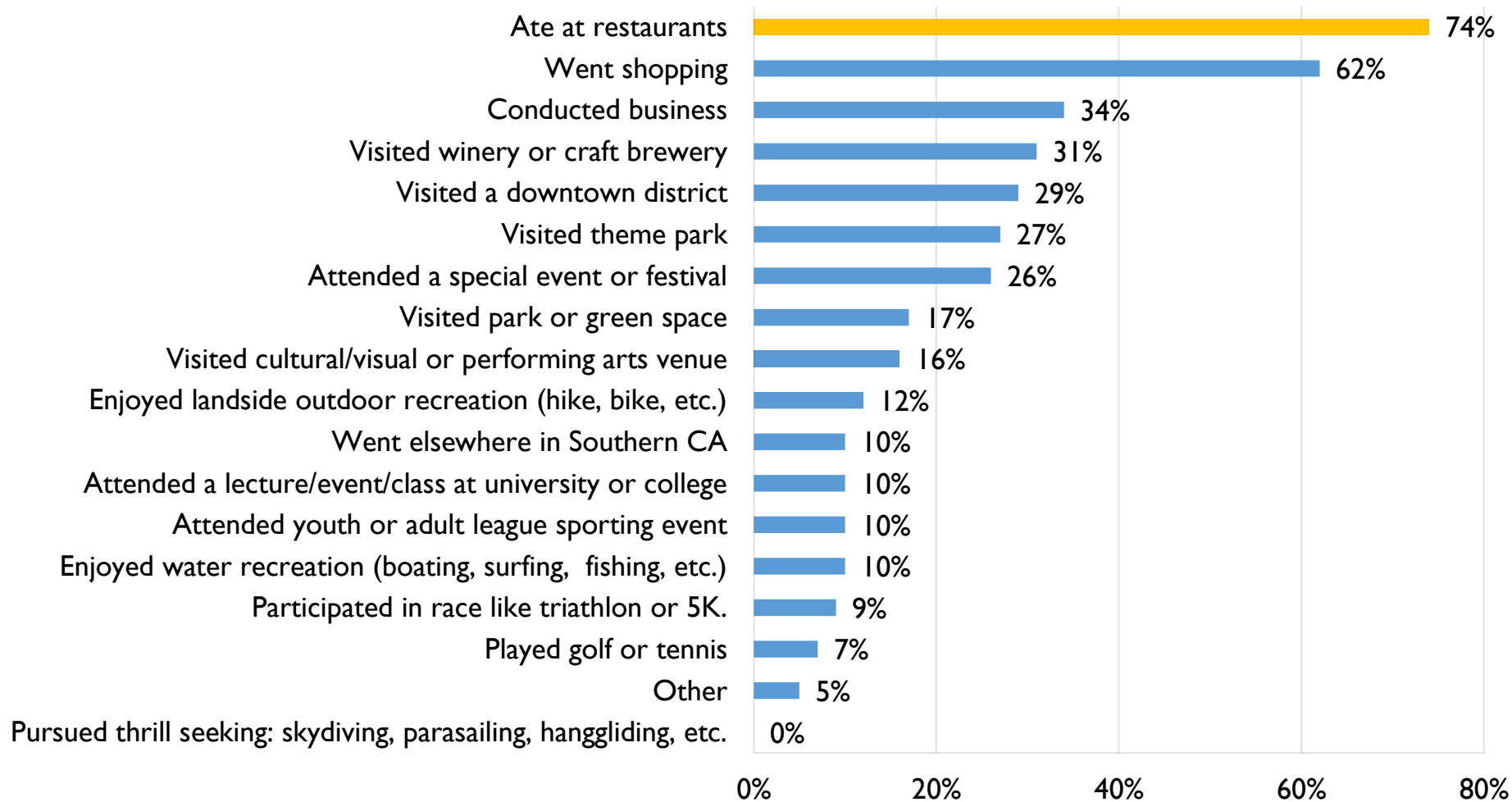
You mentioned your primary trip purpose was dining. Which community did you dine in?

- All of them
- Carlsbad
- Escondido

You mentioned you were just passing through. What was your final destination?

- Home
- Orange County
- Coastal regions
- San Diego

While you were visiting North County, which of the following did you do? Choose all that apply.



Other: Meeting at university, movie, medical appointment

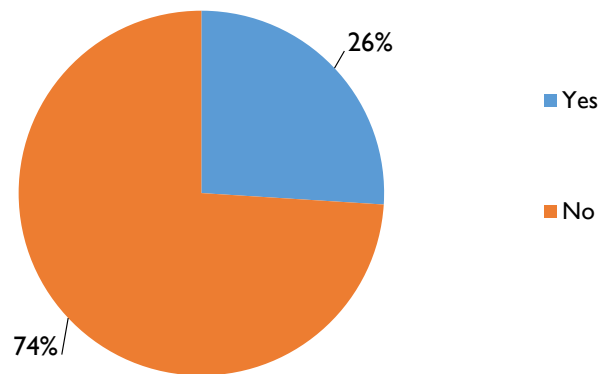
BDAP Study

PERCEPTIONS

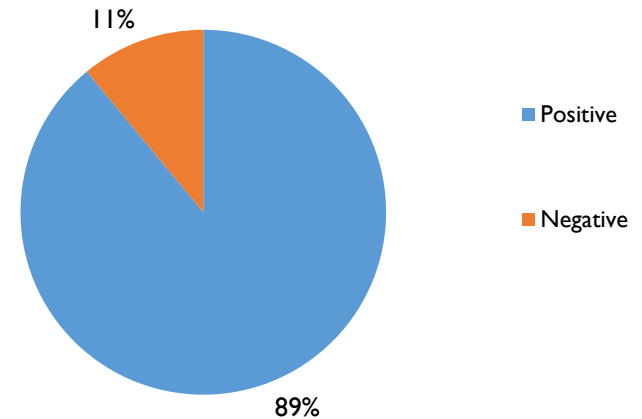
What was your perception of North County before you visited?

- *“Diverse with many things to do. But traffic makes it a pain.”*
- *“Family-oriented area, spread out, great beaches.”*
- *“A far drive, but a nice area.”*
- *“Overall desirable area, but with traffic congestion.”*

Did your perception of North County change once you visited the area?



Did your perception change in a positive or negative way?

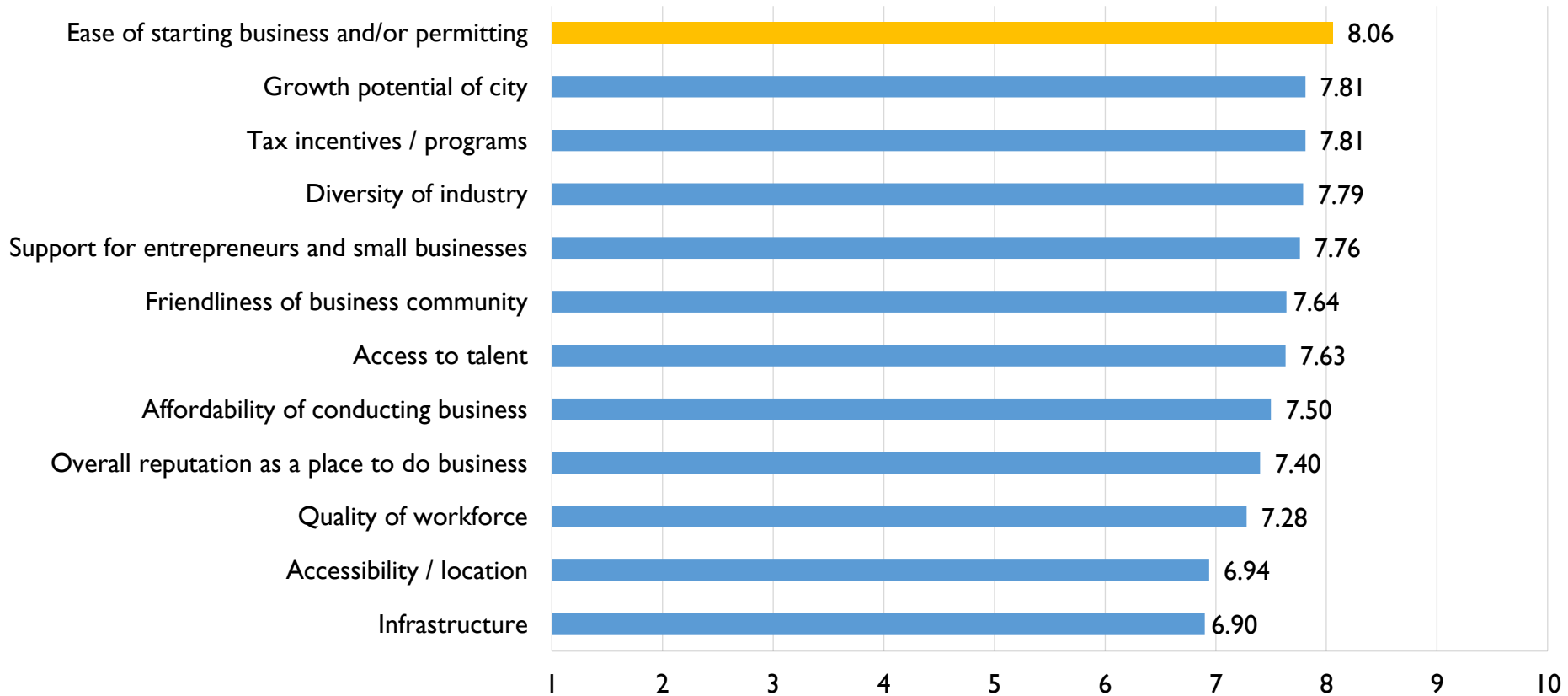


What changed your perception?

- *“It seemed far away, but it was actually a short drive.”*
- *“It’s an eclectic county – clearly beautiful and progressive.”*
- *“Seeing the new, modern development of many of the towns. They have a huge population now.”*

Based on your experience conducting business in North County, how would you rate the following business attributes of the community using a scale of 1 to 10?

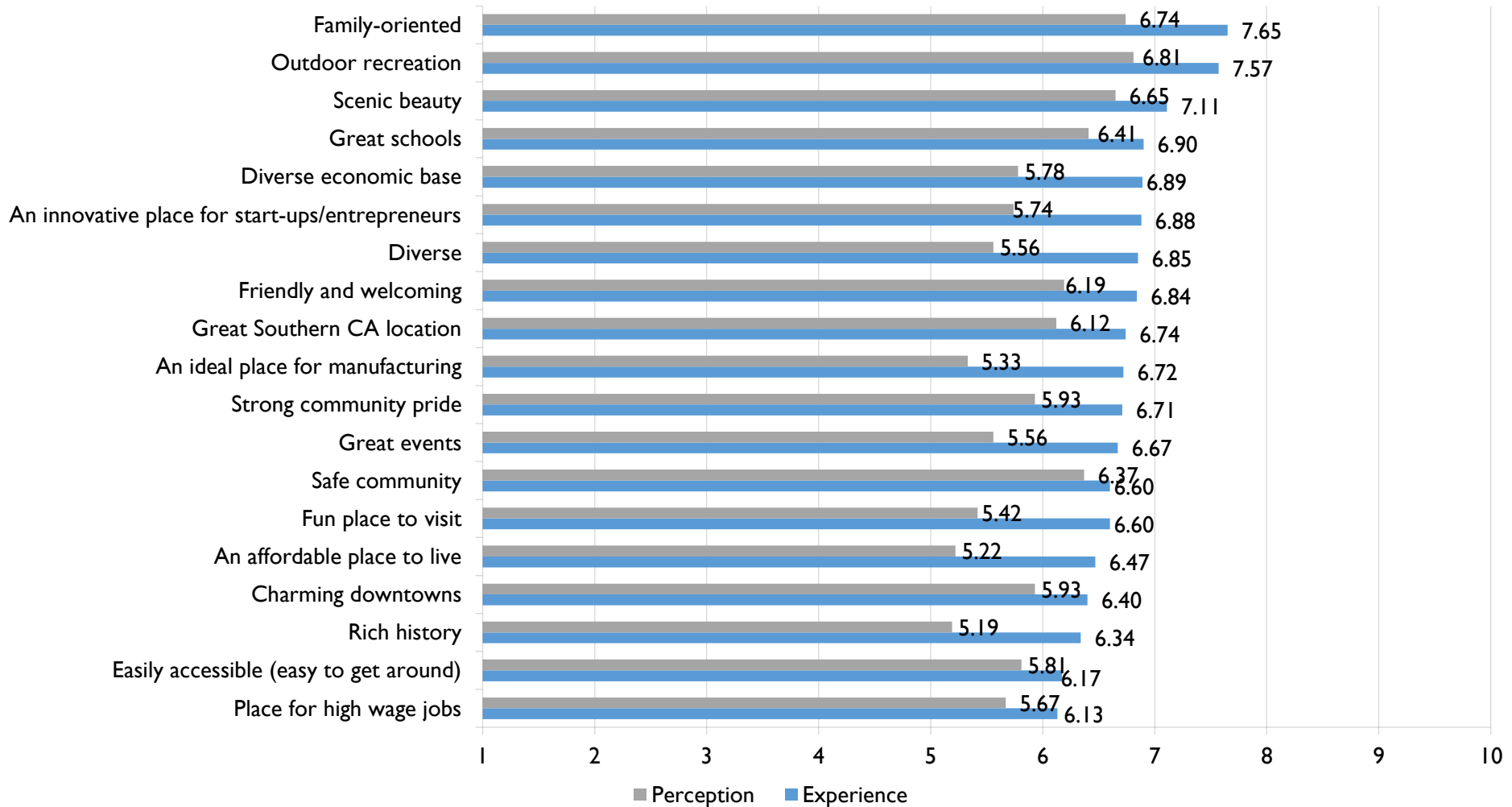
Where 1 is "poor" and 10 is "excellent."



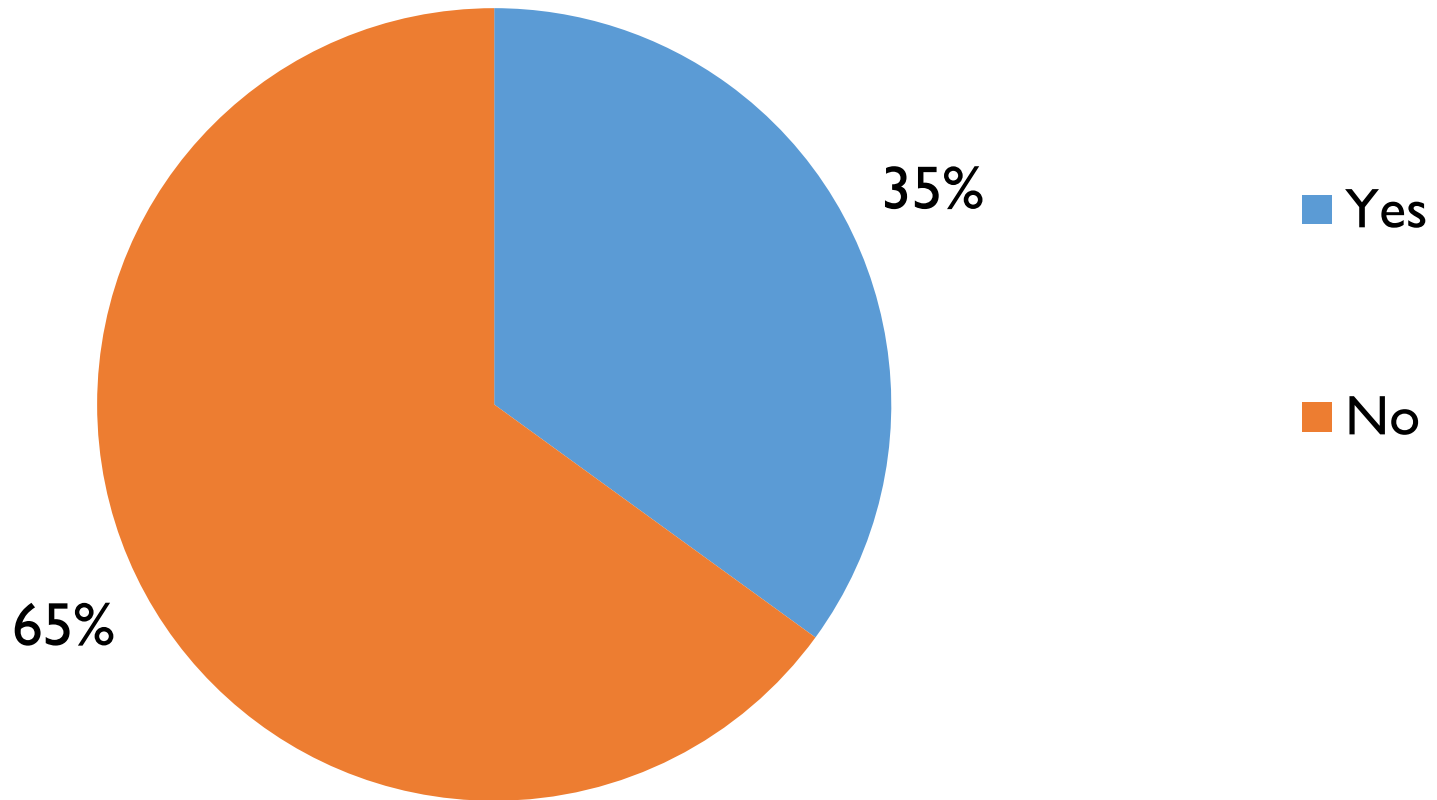
BUSINESS ATTRIBUTES | 78 respondents

How would you rate the following attributes regarding North County using a scale of 1 to 10?

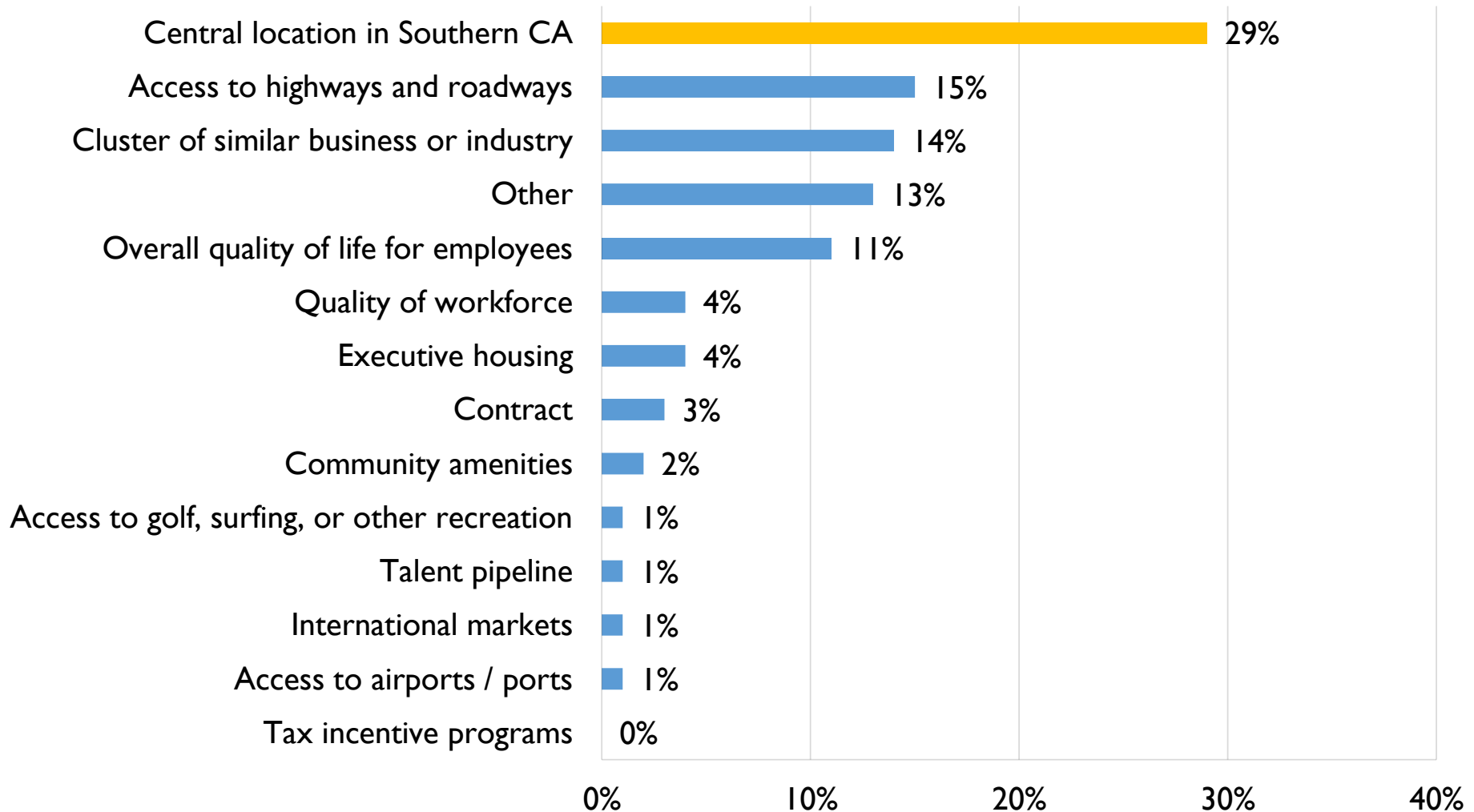
With 1 indicating "poor" and 10 indicating "excellent."



Has your business ever had a location in North County?

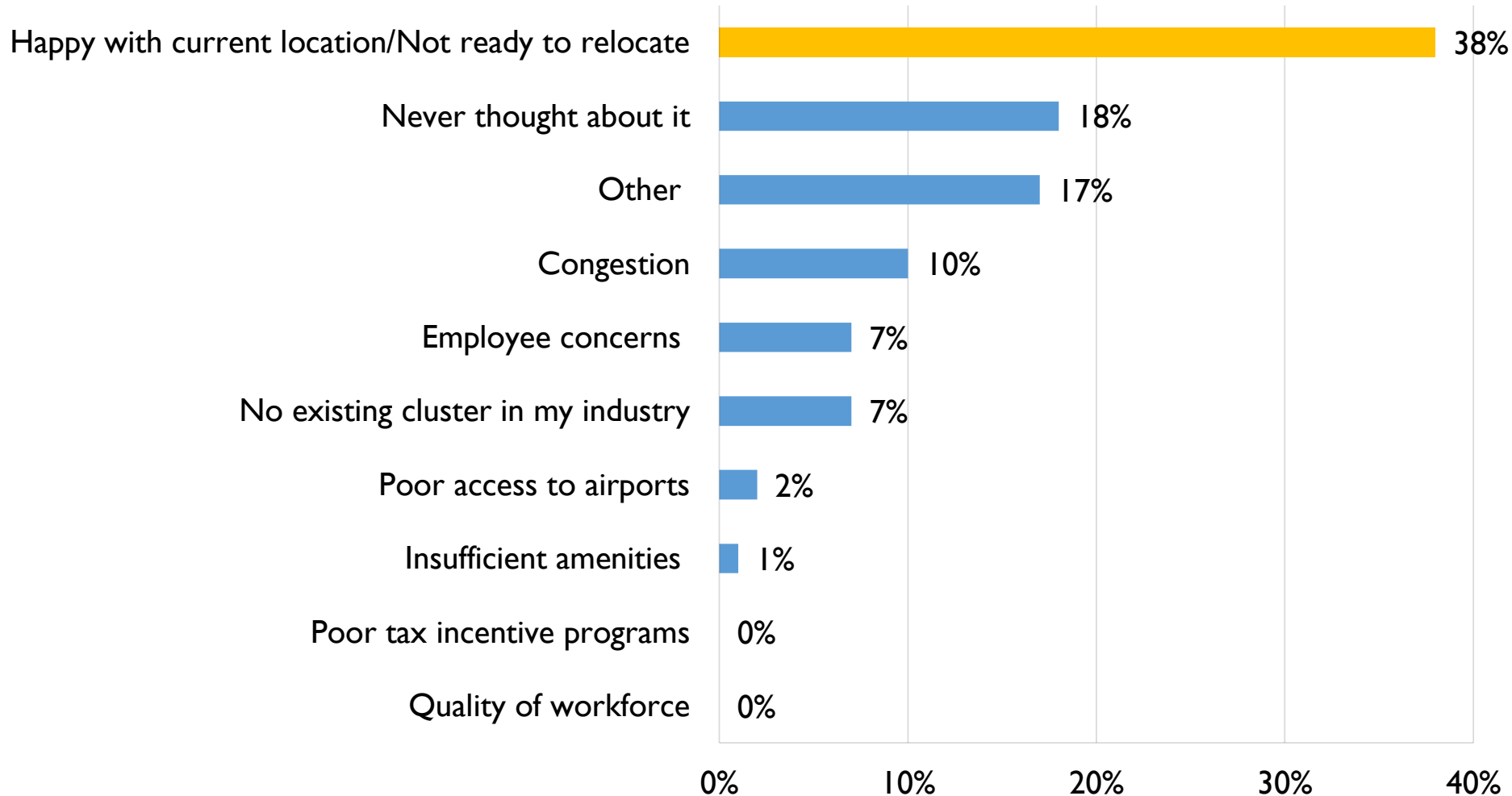


Which of the following best describes the main reason that most influenced you to bring your business to North County?



Other: Line of work, increased population, existing office

Which of the following best describes the main reason why you have never located in North County?



BDAP Study

DIFFERENTIATING NORTH COUNTY

What differentiates each of the following from the other communities in San Diego County?

OCEANSIDE: The Military

CARLSBAD: Beaches, shopping

VISTA: Manufacturing, mostly inland

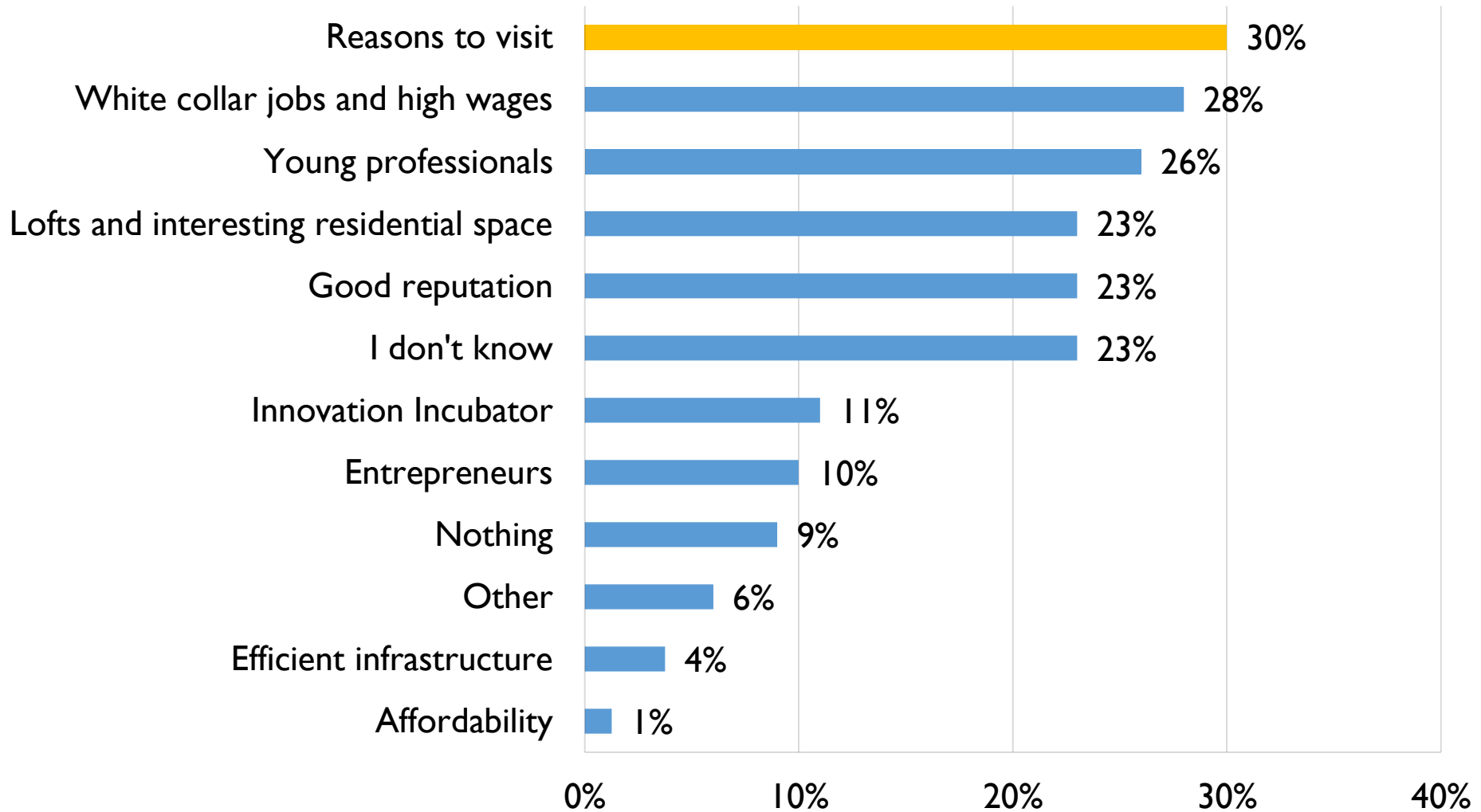
SAN MARCOS: University

ESCONDIDO: Agriculture, shopping

What differentiates the 5 cities along highway 78 as a whole from the rest of San Diego County?

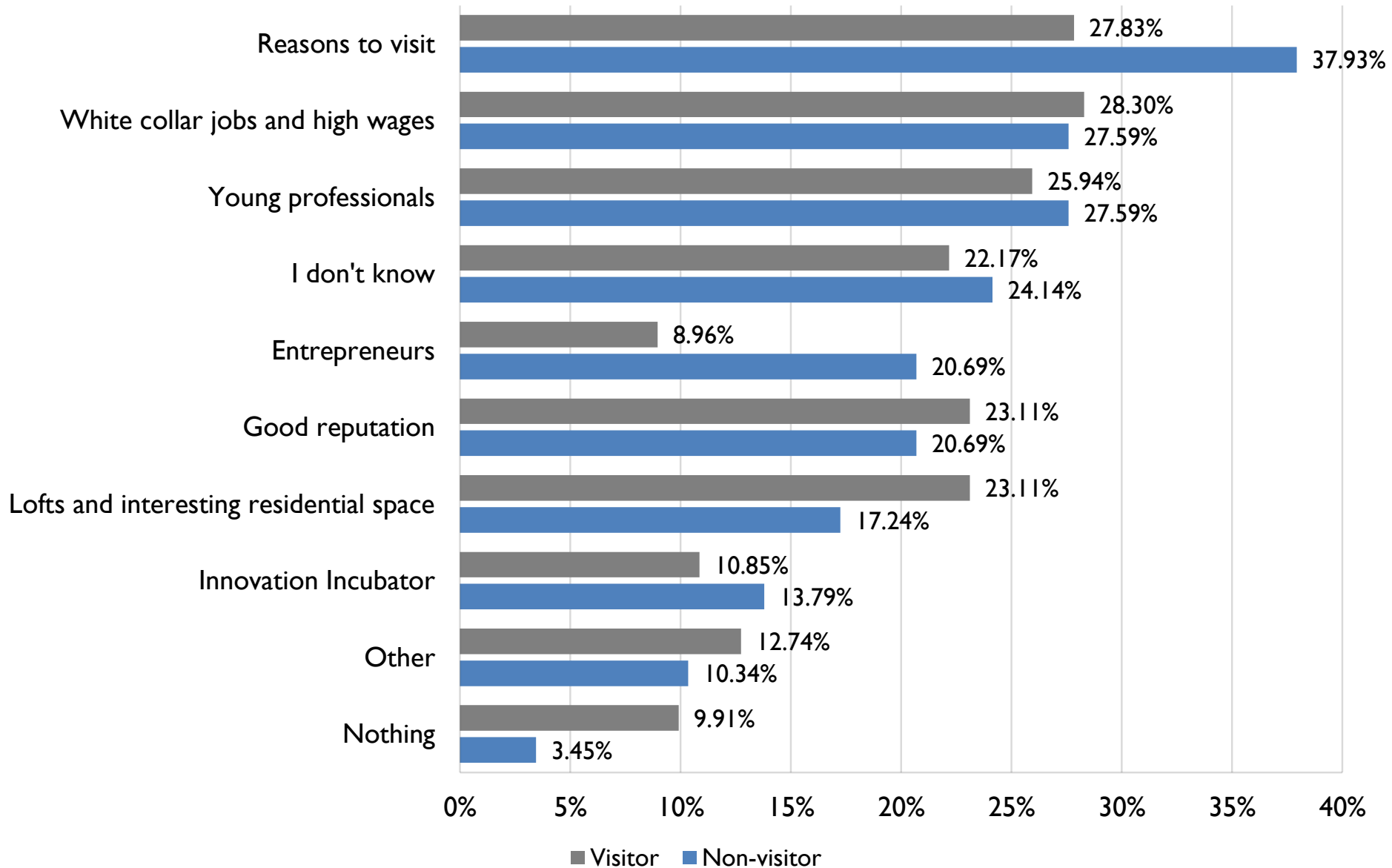
- Far away, congested traffic
- Family-oriented spaces
- Nothing

In your opinion, what is missing in North County? Choose all that apply.

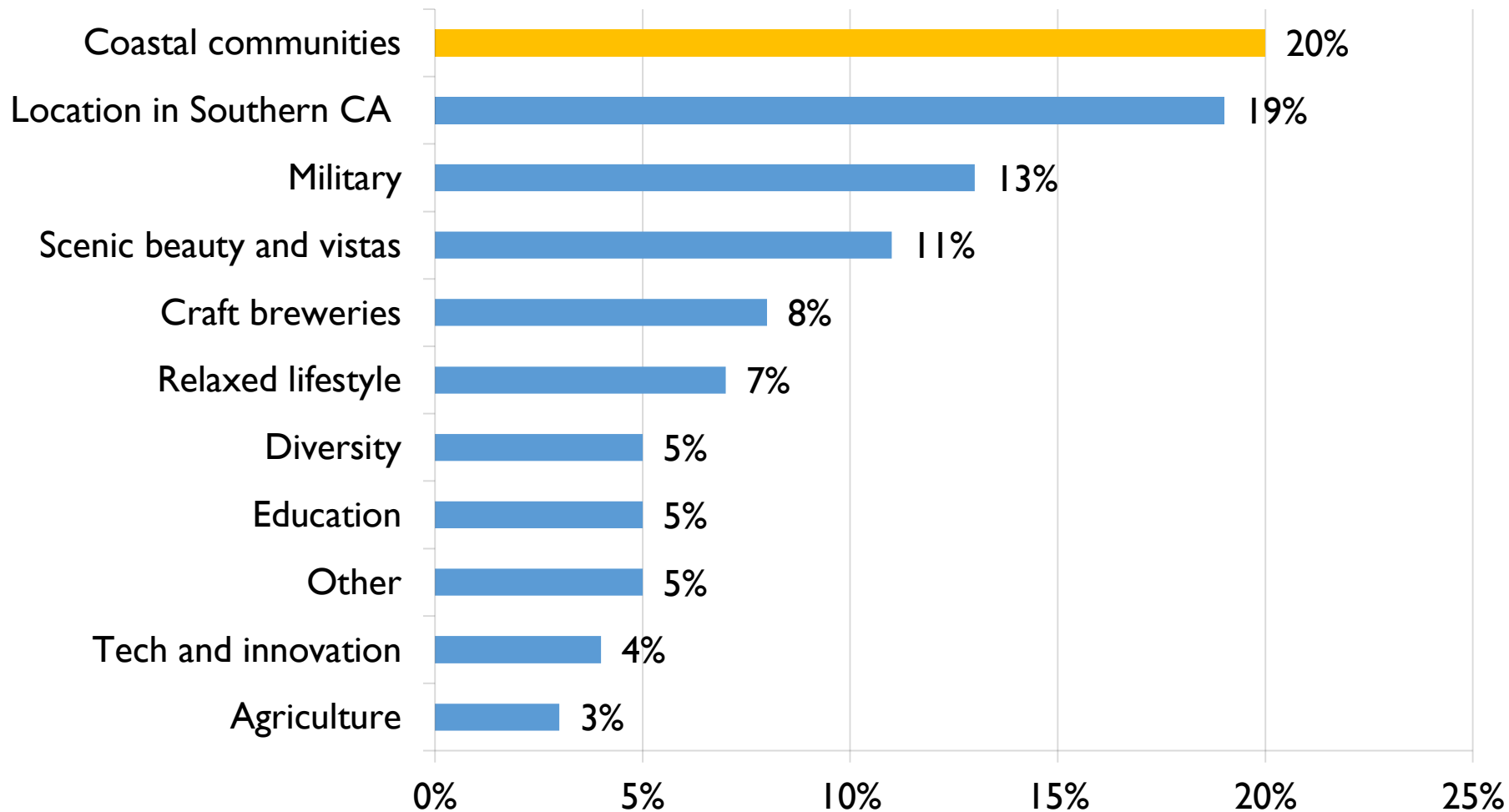


Other: Diversity, a center, dense urban living

In your opinion, what is missing in North County?

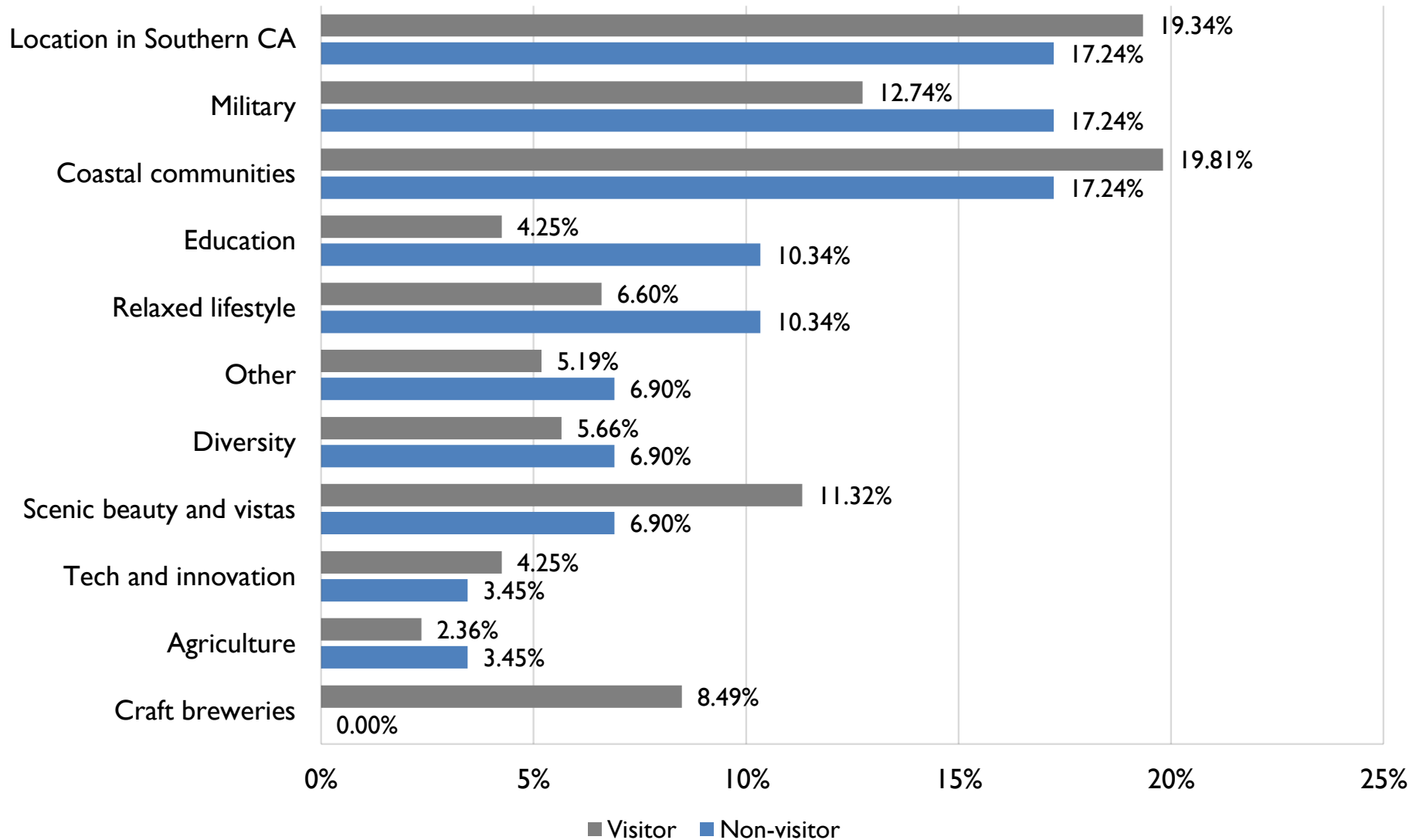


What do you consider to be most important to North County's identity today? Choose one.

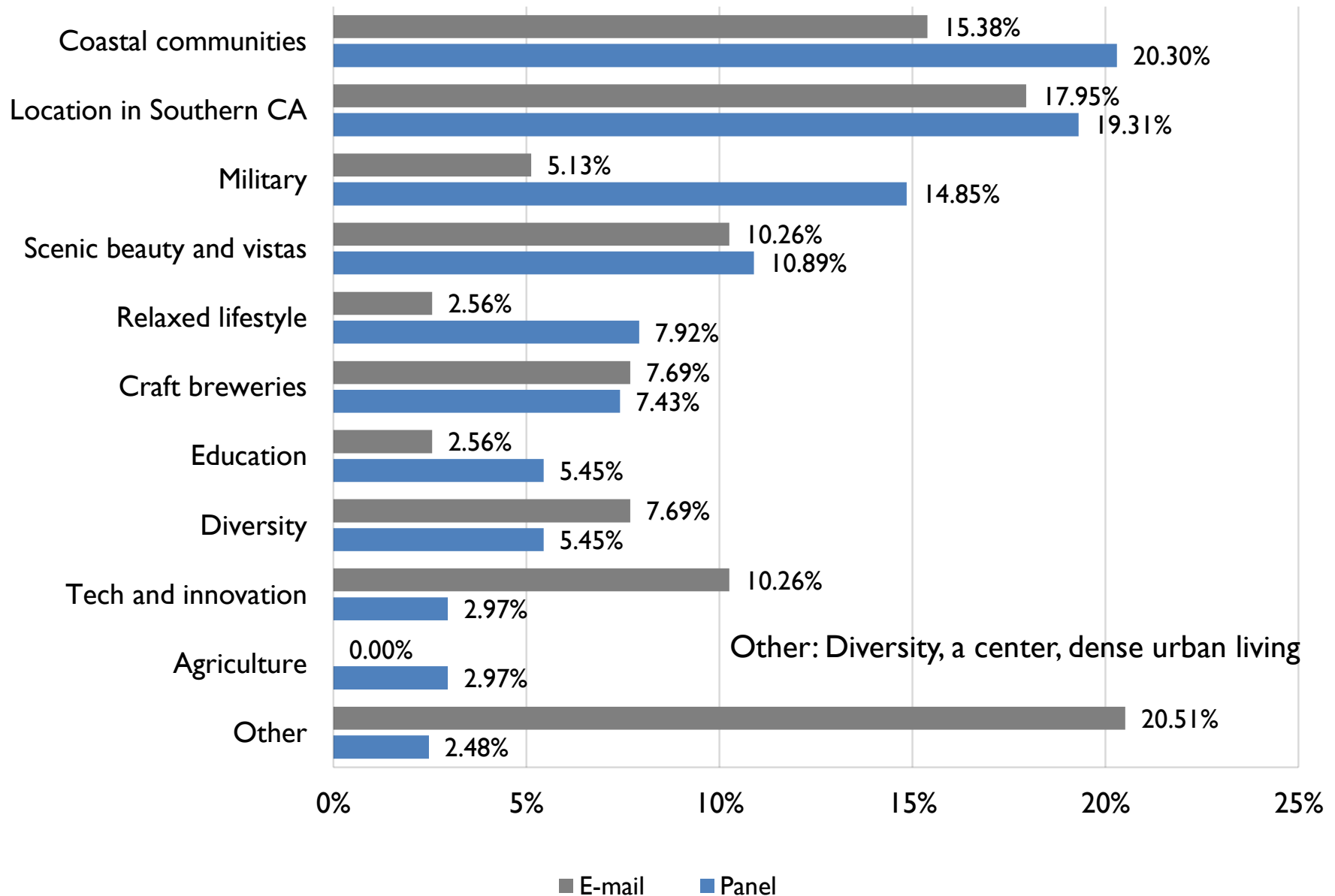


Other: Theme parks, manufacturing, affordability

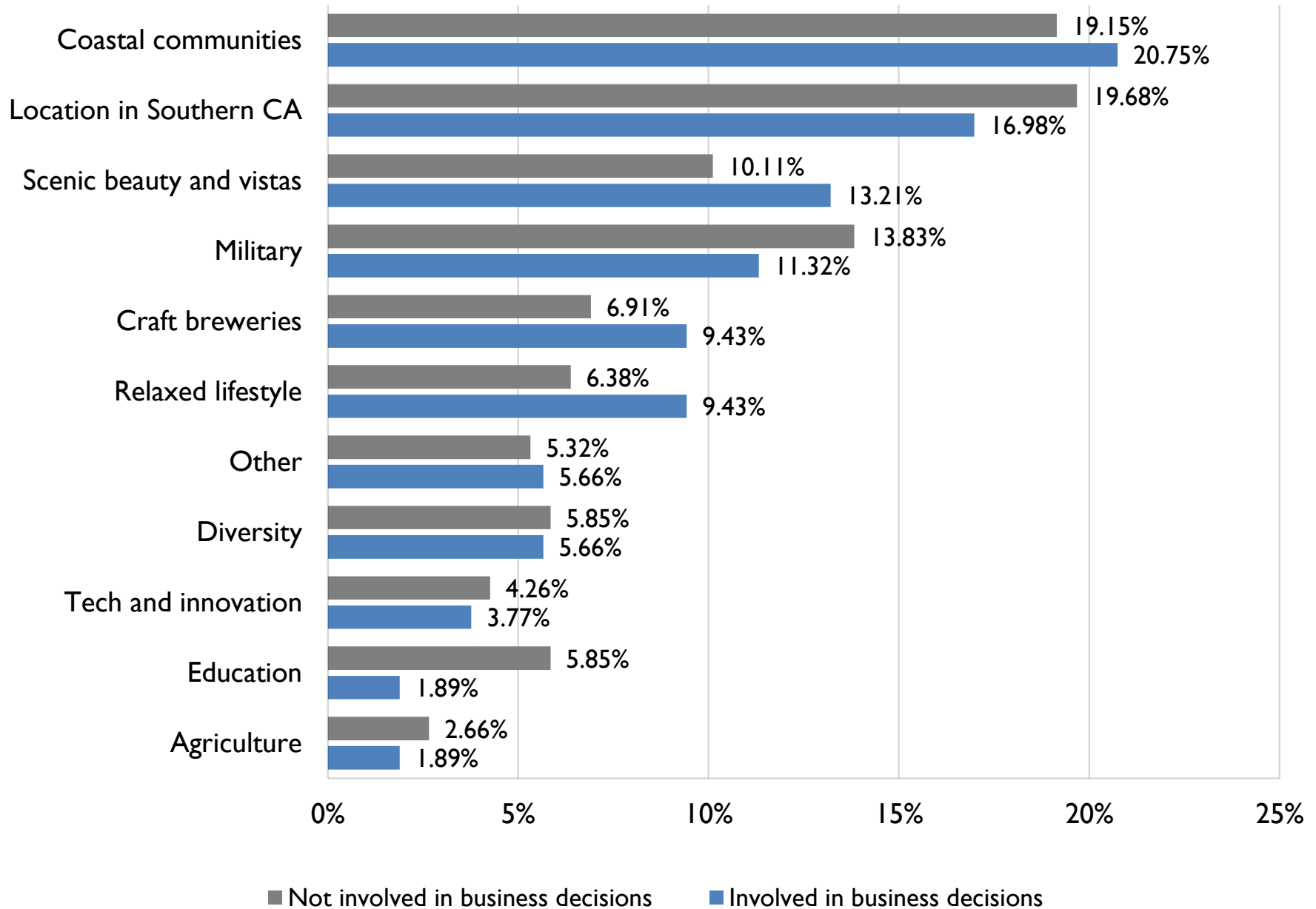
What do you consider to be most important to North County's identity today?



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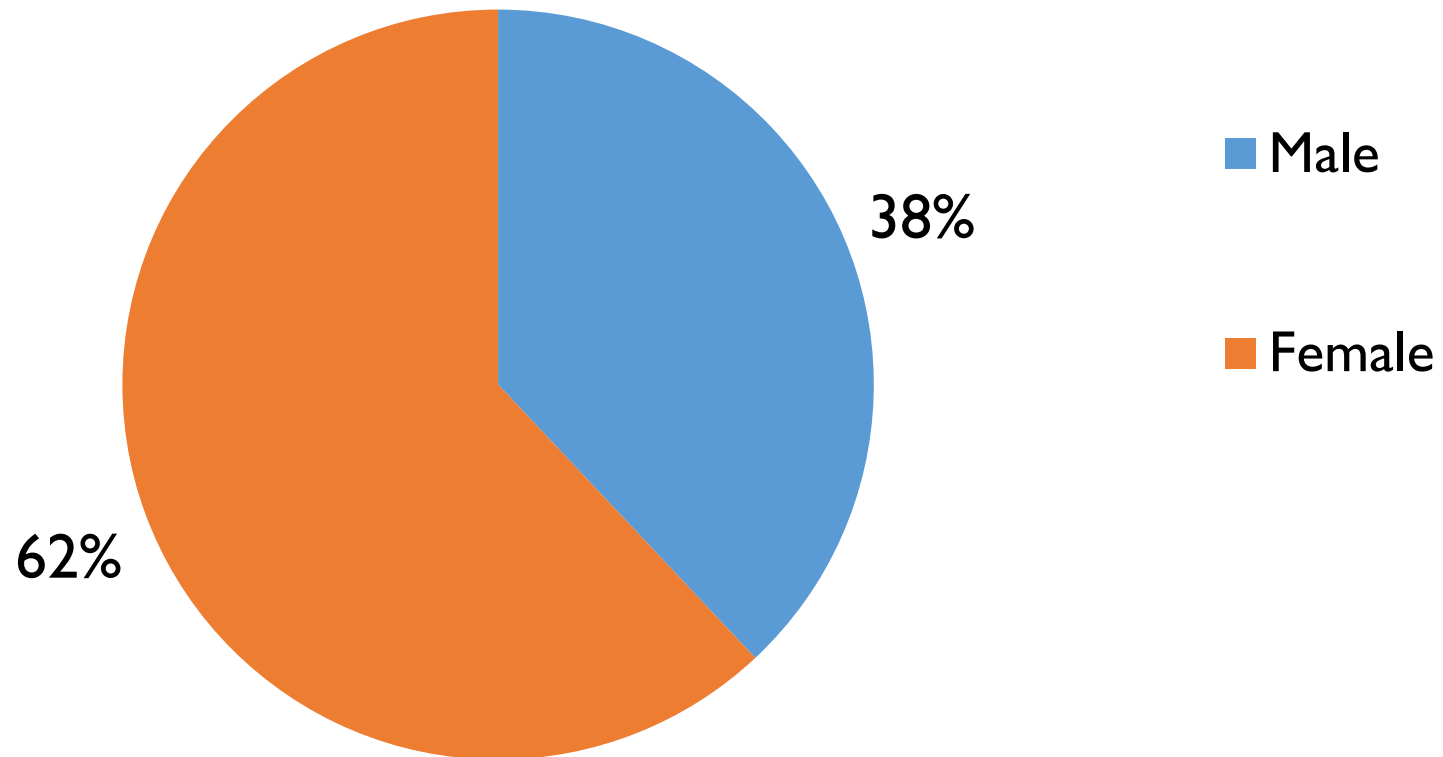
BDAP Study

NORTH COUNTY CONTRIBUTIONS

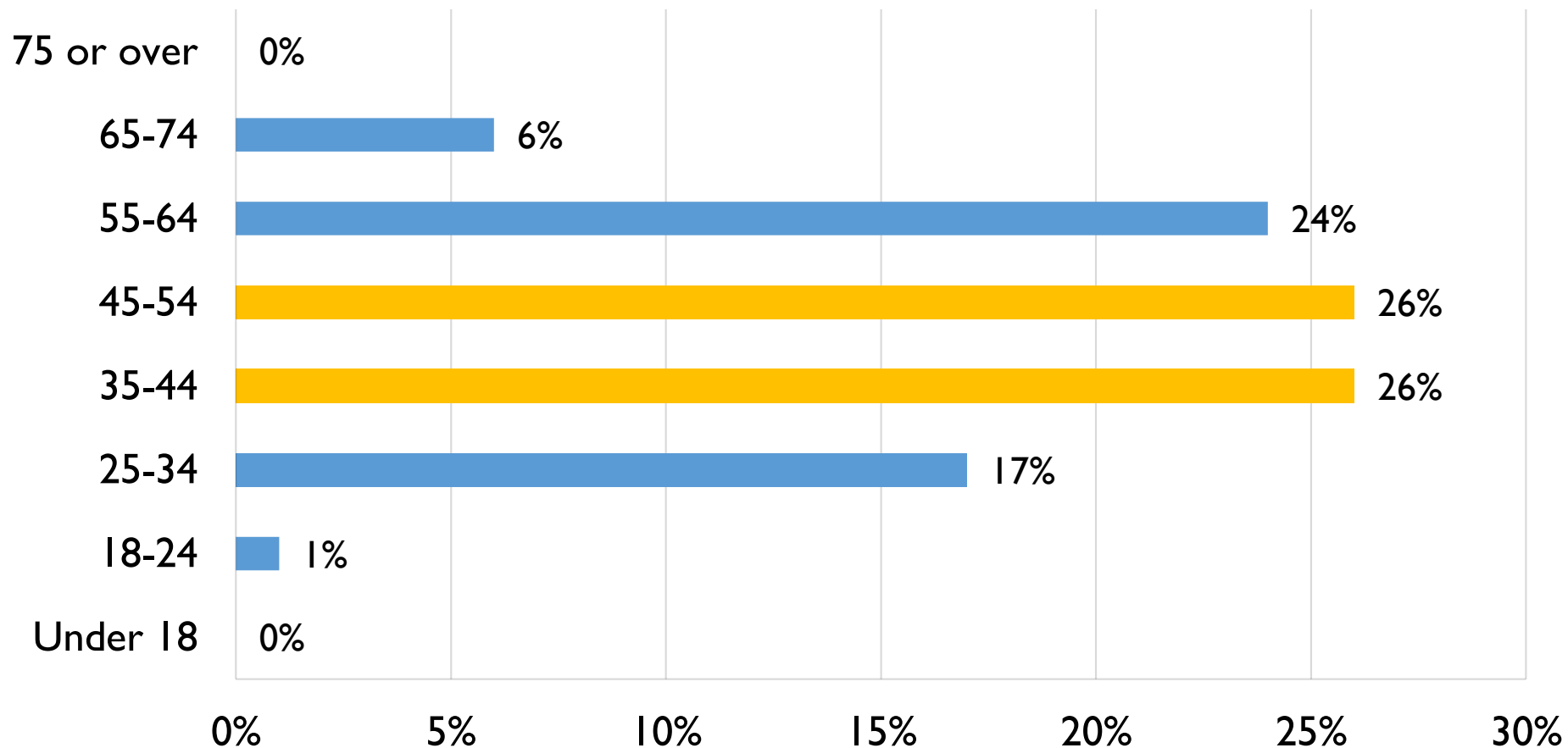
What does the whole of North County add to San Diego County?

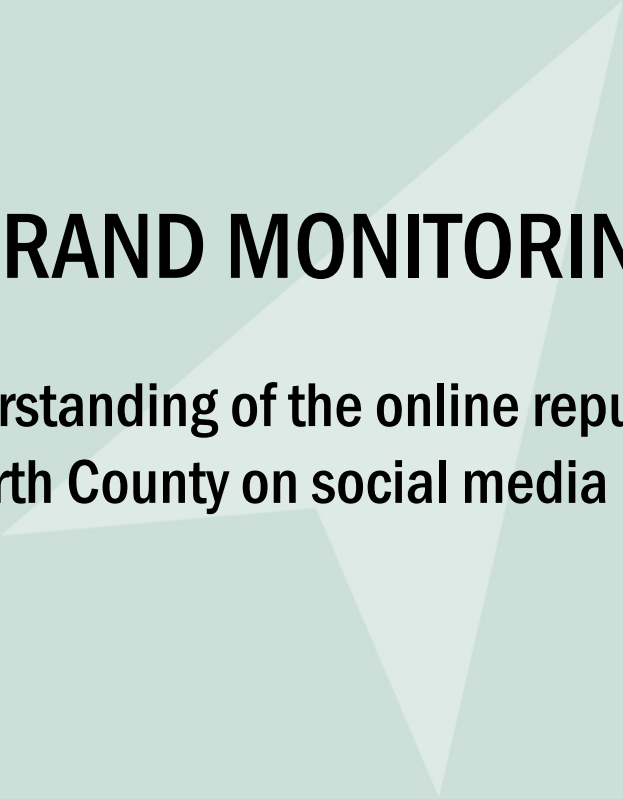
- Diversity
 - *“Cultural diversity.”*
 - *“Diverse communities.”*
 - *“A diversity in lifestyle.”*
 - *“A diversity of assets that allows San Diego County to survive and be self-sufficient when a crisis hits.”*
- Affordability
 - *“Options for families to get more affordable housing.”*
 - *“Affordable, quality homes.”*
 - *“An affordable place to live and work.”*

What is your gender?



Which of the following includes your age?





ONLINE BRAND MONITORING STUDY

Gaining an understanding of the online reputation centered around North County on social media platforms.

Online Brand Monitoring

Keywords Searched

North County

Oceanside

Carlsbad

San Marcos

Vista

Escondido

Genentech

Mira Costa College

NCTD Coaster and Sprinter Trains

California Surf Museum

San Diego Zoo Safari Park

Palomar College

Cal State San Marcos

Legoland

McClellan Palomar Airport

The Flower Fields

La Costa Resort

Callaway and TaylorMade

Camp Pendleton

Moonlight Amphitheater

Mother Earth Brewing Company

Avocados

Stone Brewing Company

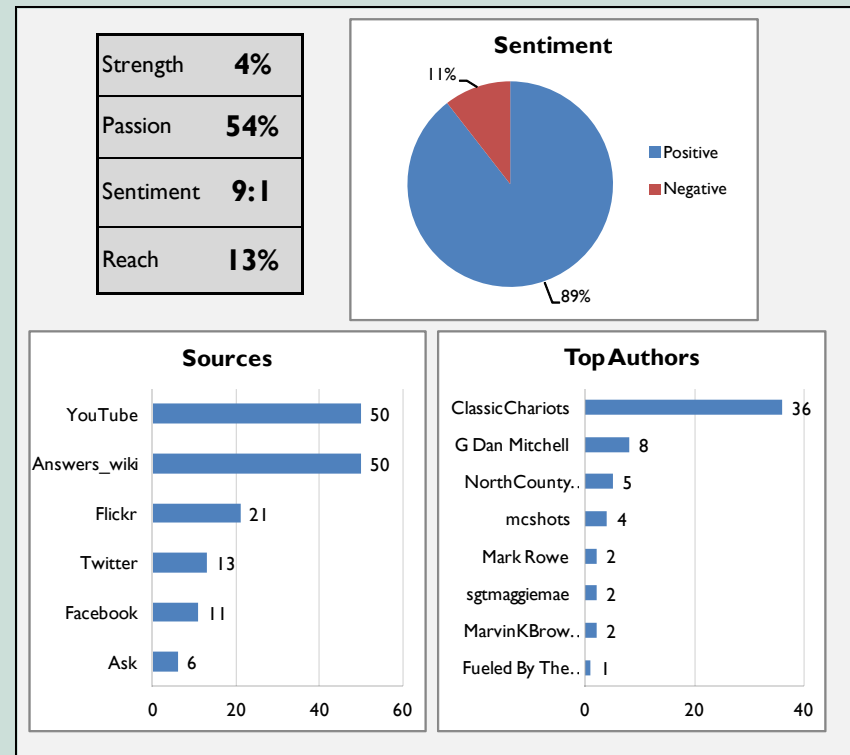
California Center for the Arts

Terms to Know

- **Strength** – the likelihood that your brand is being discussed in Social Media
- **Sentiment** – the ratio of positive to negative mentions
- **Passion** – the likelihood that individuals talking about your brand will do so repeatedly
- **Reach** – the measure of the range of influence (number of unique authors divided by the total number of mentions)

Online Brand Monitoring

North County



Observations

- Overall, there is a positive sentiment about North County throughout social media sites.
- At a 54% passion level, the good chance that those talking about North County through social media will do so repeatedly is not very strong.
- There is only an 4% chance that North County is being discussed in social media. Leveraging the top sources, such as YouTube and Flickr, would serve to aid North County's strength and reach to improve the community's online presence. Consider building relationships and partnering with top authors, as they are already working as spokesmen for the North County community.

Online Brand Monitoring

Keywords

Genentech

Strength	Sentiment
0%	9:1
Passion	Reach
41%	10%

Mira Costa College

Strength	Sentiment
1%	14:1
Passion	Reach
63%	13%

North County Transit District Coaster and Sprinter Trains

Strength	Sentiment
0%	5:1
Passion	Reach
27%	23%

California Surf Museum

Strength	Sentiment
1%	24:1
Passion	Reach
45%	18%

Camp Pendleton

Strength	Sentiment
4%	3:1
Passion	Reach
45%	24%

Mother Earth Brewing Company

Strength	Sentiment
1%	9:1
Passion	Reach
40%	16%

Online Brand Monitoring

Keywords

Legoland

Strength	Sentiment
2%	23:1
Passion	Reach
62%	17%

McClellan Palomar Airport

Strength	Sentiment
0%	9:0
Passion	Reach
25%	29%

The Flower Fields

Strength	Sentiment
0%	8:1
Passion	Reach
51%	21%

Moonlight Amphitheater

Strength	Sentiment
0%	11:1
Passion	Reach
66%	20%

La Costa Resort

Strength	Sentiment
0%	34:0
Passion	Reach
46%	18%

Callaway and TaylorMade

Strength	Sentiment
0%	5:1
Passion	Reach
0%	13%

Online Brand Monitoring

Keywords

Avocados

Strength	Sentiment
1%	26:1
Passion	Reach
30%	29%

Stone Brewing Company

Strength	Sentiment
1%	5:1
Passion	Reach
41%	12%

California Center for the Arts

Strength	Sentiment
1%	26:0
Passion	Reach
54%	18%

Cal State University San Marcos

Strength	Sentiment
0%	14:0
Passion	Reach
53%	20%

Palomar College

Strength	Sentiment
1%	8:1
Passion	Reach
15%	18%

San Diego Zoo Safari Park

Strength	Sentiment
2%	21:1
Passion	Reach
47%	26%

Competition

Understanding How Your Competition Communicates

Competitive Analysis for North County, CA

Competition

IDENTIFIED COMPETITORS From the Situation Analysis & Research

ECONOMIC DEVELOPMENT:

Riverside, CA

Irvine/Orange County, CA

San Diego, CA (City and County)

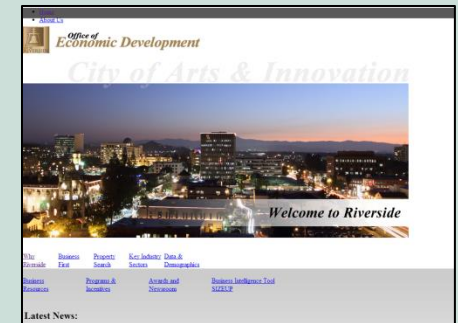
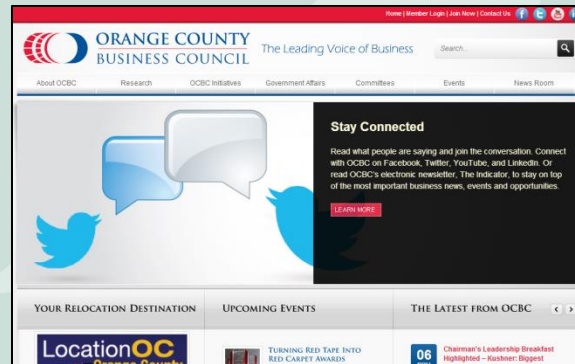
Phoenix, AZ

Boulder/Longmont, CO

Austin, TX

Competition

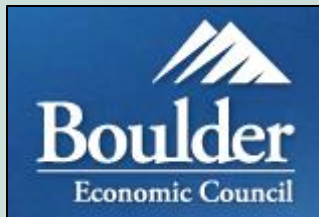
ECONOMIC DEVELOPMENT VISUALS From the Situation Analysis & Research



NORTH STAR DESTINATION STRATEGIES

Competition

ECONOMIC DEVELOPMENT VISUALS From the Situation Analysis & Research

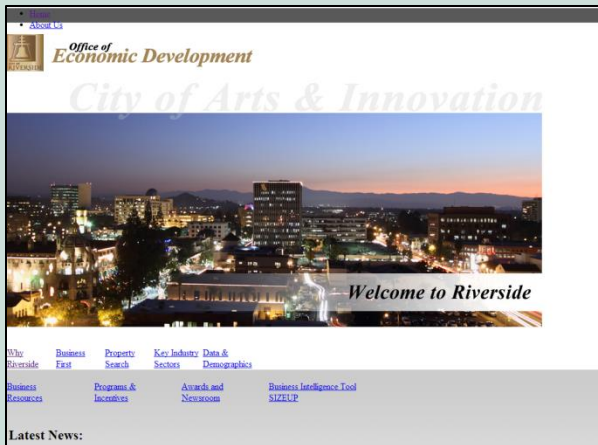


Competition

IDENTIFIED COMPETITORS

Riverside, CA

Tagline and Marketing Messages



Positioning Line:

- *EDC: "City of Arts & Innovation"*

Marketing Messaging:

- The website primarily focuses on the city of Riverside itself, and the benefit of doing business there, rather than solely promoting the organization's services. The main page of the site emphasizes the city's rapid growth, being the 12th largest city in California. It also highlights the city's abundance of higher education, efficient transportation, and strong infrastructure. The site also provides testimonials from various businesses/corporations, such as ABC, who have done business in Riverside.
- The website also describes the Office of Economic Development's commitment to the community through its implementation of *The Business First Program*. This program provides businesses in Riverside, both large and small, with personalized assistance. This program benefits the community by bringing it services and financial stability.

Competition

IDENTIFIED COMPETITORS Riverside, CA Visual Branding



Why Riverside



The rapidly growing city of Riverside is home to four internationally recognized universities and colleges, providing training, research partnerships, and a high-technology environment.



As an important financial and commercial center, Riverside is one of the fastest growing counties in California.

Businesses also benefit from an exceptional freeway system, BNSF, and the Orange County Airport.

Testimonials



"The show Splash looked AWESOME – it was hard to imagine it was there!"

- In terms of visual branding, the Riverside EDC website is lacking overall. First of all, the site looks dated with its white and grey background, blue links, and plain, Times New Roman font. This gives users a negative initial impression.
- There are a very limited amount of images throughout the site. There is a photo of the city on the homepage, along with a few in various other sections, but there is a lack of visuals overall.
- The site's color scheme is simple – white, grey, and blue – but does very little to draw attention to or emphasize the city.

Competition

IDENTIFIED COMPETITORS Irvine/Orange County, CA Tagline and Marketing Messages

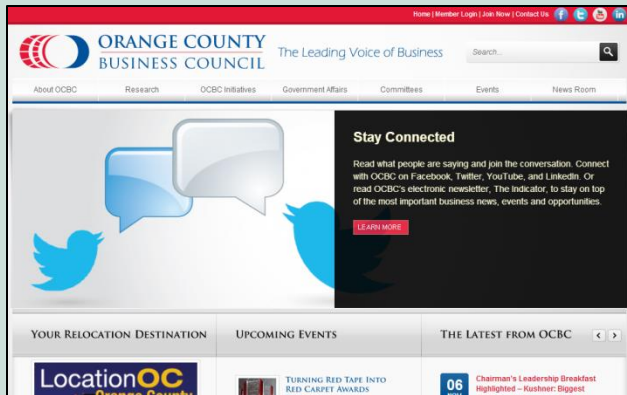


Positioning Lines:

- *EDC: "The Leading Voice of Business"*

Marketing Messaging:

- The Orange County Business Council explains that it is the combination of the Orange County Chamber of Commerce, the Industrial League of Orange County, and the Orange County Economic Development Consortium. Its primary goal is to make Orange County a better place to live, work, and raise a family.
- The site is very well put together and easy to navigate. It clearly presents information on a variety of topics that local businesses would find useful, such as research, the organization's initiatives, government affairs, committees, and events.
- The website's main strength is its tone. It effectively presents the organization as an extremely positive and self-assured force within the community that continuously works give citizens a strong economic advantage.



Competition

IDENTIFIED COMPETITORS **Irvine/Orange County, CA** Visual Branding



- The website is simply laid out, with tabs across the top of the page directing users to various pages, so that it is easy to navigate and understand.
- The website emphasizes the organization's involvement in the community by showcasing photos of the County's features at the top of the page, and cycling through them with each new page that the user views.

Competition

IDENTIFIED COMPETITORS

San Diego, CA (County and City)

Tagline and Marketing Messages



Positioning Lines:

- *County EDC: "The Big Picture: Regionally Focused. Globally Competitive."*
- *City EDC: None Found*

Marketing Messaging:

- **County:** The website does not strongly emphasize the organization's ties to the community. Rather than stress how their economic initiatives and goals will benefit the community as a whole, like Orange County's website did, San Diego County's site simply explains what the organization does to improve the region's economic standing. It does, however, clearly present a great deal of helpful information about the region, events, research, and services.
- **City:** The website strongly promotes the city of San Diego as being an ideal place to do business by emphasizing its strong economy, diverse population, educational institutions, good quality of life, and location. The site also explains how the organization itself helps to stimulate economic growth, assist local businesses, and create a high quality of life.

Competition

IDENTIFIED COMPETITORS San Diego, CA (County and City) Visual Branding



- **County:** The website is very modern and aesthetically pleasing. The homepage has a large slideshow in the center which showcases images of various features of the County. The first of these images is a panoramic photo of San Diego which is curved like the Earth – reinforcing the organization’s tagline by taking a regional focus and applying it globally.
- **City:** The website is limited to a section of the city’s website, and is slightly more dated looking than its regional counterpart. The banner at the top of the page shows the city’s skyline, while a slideshow in the center displays various features of the city. The site is a bit cluttered and hard to navigate, and could be streamlined.

Competition

IDENTIFIED COMPETITORS

Phoenix, AZ

Tagline and Marketing Messages



Positioning Line:

- *EDC: “The Perfect Climate for Adventure.”*

Marketing Messaging:

- The website very effectively promotes both the city of Phoenix and the economic development organization – subtly emphasizing the fact that they are codependent.
- The site touches on the appeal of the region in terms of weather and leisure, but then emphasizes the fact that it has much more to offer with regard to a progressive, low-cost operating environment and a large pool of young, diverse talent.
- The website modestly showcases the benefit organization brings to the region by putting the “About Us” tab last on the banner and only briefly summarizing its goals and achievements. The main emphasis of the section is the organization’s goals, which are to attract quality businesses to the area and advocate foundational efforts to improve the region’s competitiveness.

Competition

IDENTIFIED COMPETITORS Phoenix, AZ Visual Branding

DOING BUSINESS HERE



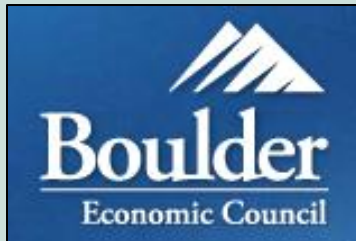
COMMUNITIES



- Visually, Phoenix's EDC website very effectively integrates images of the city into each page. Every page has a different image of the city which serves to emphasize the topic being discussed. This reinforces the idea that the organization is a part of the community.
- The site's color scheme – brown and gold – not only compliments the image of the city on the website's homepage, but also ties into the desert colors of the region as well. This is a more subtle way of tying the organization to the city.

Competition

IDENTIFIED COMPETITORS Boulder/Longmont, CO Tagline and Marketing Messages



Positioning Line:

- ***EDC: "Elevate Your Business"***

Marketing Messaging:

- The Boulder EDC website portrays the city as a cutting-edge market. While it touches on the city's location, describing it as the perfect balance of work, play, and relaxation, it emphasizes its ties to higher education, research facilities, visionary entrepreneurs, and educated work force.
- The site describes the organization's mission as growing, retaining, and attracting businesses that reflect the city's values and contribute to the economic sustainability of the community.
- Overall, the site describes Boulder as a city that fosters creativity, innovation, and growth. On the homepage, it provides evidence to support its claims by showcasing success stories and economic data. It also lists the top ten industries in the city, and provides detailed information about them. This reinforces the image of Boulder as a home to growing industry.

Competition

IDENTIFIED COMPETITORS Boulder/Longmont, CO Visual Branding



- While the website only briefly touches on the city's iconic outdoor image, its visual branding clearly focuses on it. The logo, banner, and image at the center of the homepage all showcase the area's mountainous topography.
- The site's rich blue background produces the effect of a clear, open sky, which compliments the various images of mountains.
- This visual branding helps to reinforce the idea of Boulder being an outdoor-oriented community so the text of the website doesn't have to. This gives the information of the site the freedom to focus on the city's economic assets.

Competition



IDENTIFIED COMPETITORS Austin, TX

Tagline and Marketing Messages

Positioning Line:

- *None Found*

Marketing Messaging:

- Information for Austin's Economic Development Department is limited to a section of the city's website, but still provides a great deal on information.
- The site describes the city as a hotbed of creativity, a place where small businesses thrive, and leading the region's growth. It also describes the city as a leader in technology, art, music, innovation, and creativity.
- The site's major focus is on the organization's small business advocacy. It describes the city as one that takes a great deal of pride in local business and the vibrant community. In order to support this, the organization states that its goal is to create a sustainable cultural and economic environment that enhances the vitality of Austin. They also showcase their Small Business Development Program, which strives to support and give aid to local small businesses.

Competition

IDENTIFIED COMPETITORS

Austin, TX

Visual Branding



- The website's visual branding strongly supports the focus on the community of Austin. The banner images, which change for each page, showcase images of the city and its residents.
- There are also various images of local businesses and events throughout the site, as well as a video at the bottom of the homepage which encourages users to get to know a local business by interviewing its owner.
- The color scheme of earth tones serves to associate the website with the city's desert surroundings.

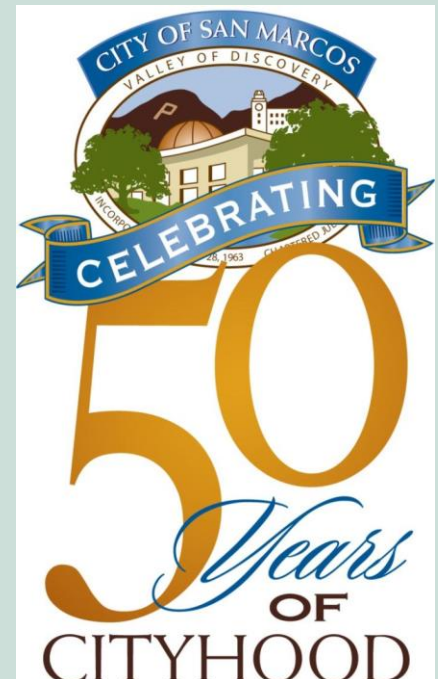
IDENTIFIED COMPETITORS Economic Development Summary

What do these communities share in common? What differentiates them?

- All of the sites marketed the economic development organizations as a valuable resource for their respective communities. The organizations are described as working to create a stable local economy, attract new business, and retain the businesses that already exist.
- Some websites, such as Riverside's, San Diego's, Boulder's, and Austin's, focused their marketing message on the city itself being a conducive environment for business, while others focused more on the organization's work. Phoenix's site was the only one to effectively balance both.
- Most of the sites have strong uses of visual branding, showcasing images of their respective communities. However, many of the sites did not have a strong color scheme which made them appear sparse and uninteresting.

Competition

NORTH COUNTY VISUALS From the Situation Analysis & Research



Competition

North County, CA (San Diego North)

Tagline and Marketing Messages



Positioning Line:

- *EDC: “Building a stronger North County economy through regional collaboration and leadership.”*

Marketing Messaging:

- The website lacks a strong marketing message.
- The County is given a description on the site, but it is fairly brief. The site describes the County as rapidly growing, with cities both inland and on the coast which are perfect for both businesses and families.
- The site also briefly markets the EDC, describing it as an organization working to sustain and strategically grow the economic base of North San Diego County.
- Other useful information is provided, and is easy to find, throughout the site, but is not presented in a clear marketing message.

Competition

North County, CA (San Diego North) Visual Branding

Bringing Leaders Together!



Welcome to San Diego's North County



- The website's visual branding is effective. There are a variety of images throughout the website – a rotating banner on the homepage, banners specific to the topic on each subpage, and various images on each page – that reinforce the image of North County as region with a variety of landscapes.
- There are also picture icons in the top industries section rather than words, which help to draw the user's attention to them.
- The color scheme is not very prominent – white with green accents – but this does not detract from the overall aesthetics of the site. It rather enhances the effect of the images by not distracting the user from them.

UNDERSTANDING NORTH COUNTY RESIDENTS AND CONSUMERS

Resident and Regional Tapestry Data

Understanding Tapestry Classifications

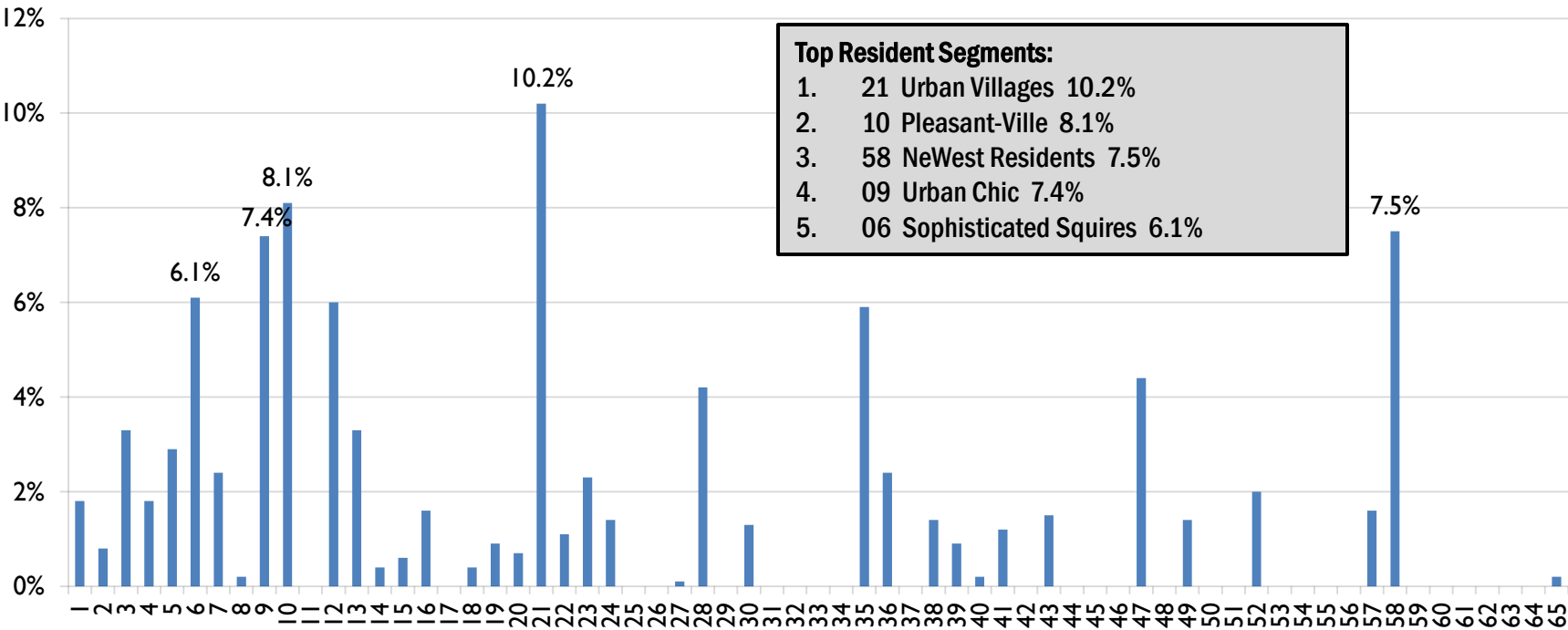


- ▶ Tapestry is a proven methodology that has mapped out the entire United States. Every address in the country belongs to one of 65 Segments
- ▶ The Tapestry system mines both public (Census) and private databases (including credit card data, shopper loyalty cards, etc.) to provide information about the type of person who lives at each address.
- ▶ The Segments are separated by lifestyle, lifestage, and level of affluence.
- ▶ Segment one is the most affluent Segment and 65 is the least affluent Segment.
- ▶ Segment names hint at aspects of the group: lifestage, income level, habits, etc. (e.g. *Exurbanites* have left the big city; *Midland Crowd* is middle income and middle-aged.)

Segment Breakout

North County residents represent several segments, *Urban Villages* being the most distinguished.

Tapestry Segments | North County Residents



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Affluence Range

\$

Segment Spotlight

21 Urban Villages (10.2%) – Indexed 798 against the U.S. average

- Multicultural young families unique to densely populated cities in gateway states, particularly California.
- The average family size is 4.09. Median age is 31 and median HHI is \$54,400.
- High diversity, including 1/3 foreign born.
- Since most of the houses were built before 1970, home maintenance is a big expense.
- Enjoy going to Disneyland and Sea World, watching movies, eating out, and playing soccer.
- They rent foreign videos and listen to Hispanic radio.

10 Pleasant-Ville (8.1%) – Indexed 450 against the U.S. average

- Prosperous domesticity; families, especially, middle-aged married couples.
- 40% of the households have children. Median age is 38.7 and median HHI of \$72,000.
- The diversity of Pleasant-Ville is comparable to that of the United States.
- Settled and enjoy where they live; 12% are willing to commute more than 60 minutes to work.
- Home improvement is a priority but doing the projects themselves is not.
- Pleasant-Ville residents spend their leisure time dining out, going to ball games or vacationing. They enjoy traveling abroad, especially on cruises.
- Use PCs only for consumer purchases.

Segment Spotlight

58 NeWest Residents (7.5%) – Indexed 586 against the U.S. average

- More than half of the NeWest residents are foreign born and many arrived within the last 10 years.
- The median age is 25 years and the median HHI is \$26,200.
- Language is a significant barrier.
- They live a very family-oriented lifestyle with an emphasis on spending for children's goods and groceries.
- Residents prefer to use cash rather than own a credit card.
- They own one television set but very few have internet access or cable. However, they do tune into sports programming and listen to Hispanic radio.

09 Urban Chic (7.4%) – Indexed 414 against the U.S. average

- Professional couples living an urbane, exclusive lifestyle.
- Median age is 41 and median HHI is \$82,000+.
- Travel extensively, maintain luxury cars, and embrace city life by visiting museums, attending dance performances, and participating in civic activities.
- Frequently use PDAs and cell phones.
- Read multiple newspapers and magazines and shop at upscale establishments, preferring to buy dress clothes over casual wear.

Segment Spotlight

06 Sophisticated Squires (6.1%) – Indexed 225 against the U.S. average

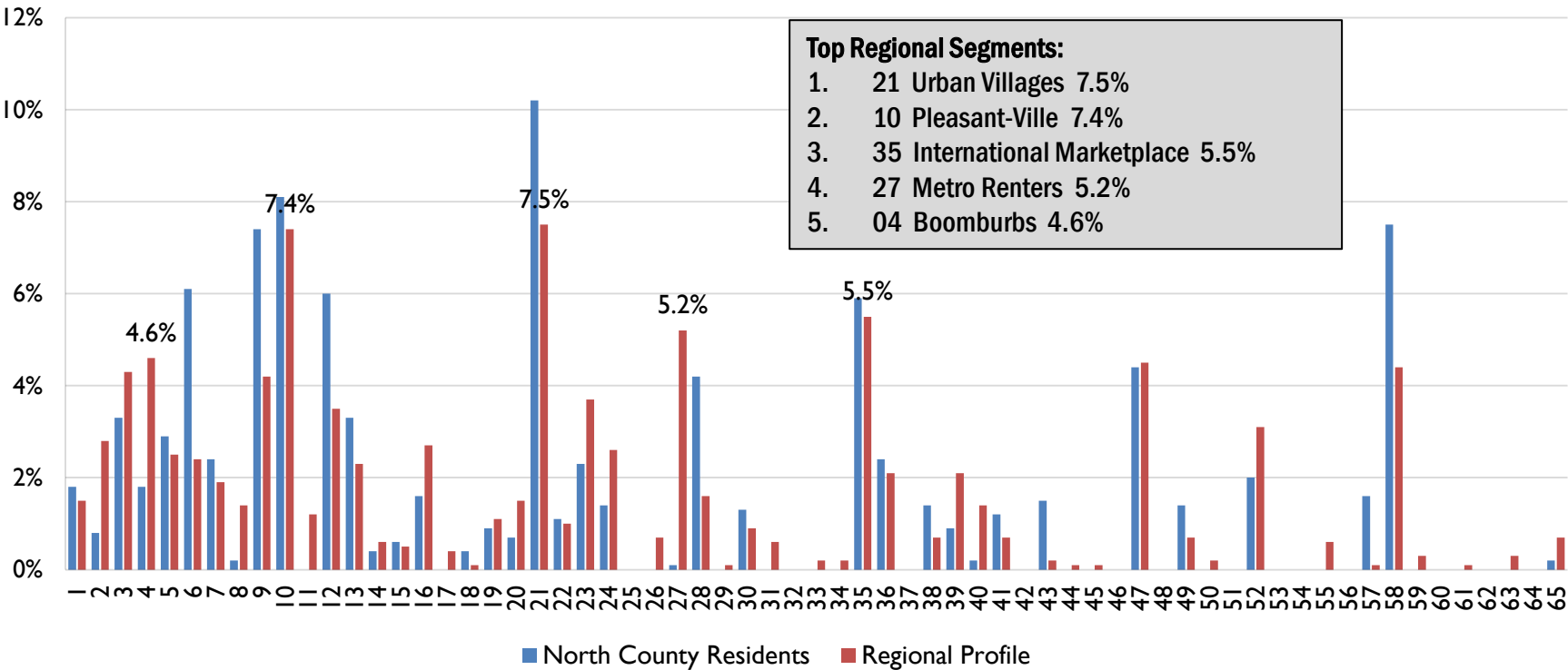
- Enjoy cultured country living in newer home developments on the fringe of urbanized areas.
- Mostly married-couple families; approximately 40% have children varying in age from toddler to over 18 years.
- Median age is 37 and median HHI is \$79,000.
- Sophisticated Squires drive SUV's and Minivan's. Cargo space is essential for the avid golfers and for DIY projects.
- Very health conscious; many own treadmills, join Weight Watchers, or take dietary supplements.
- They own all their own tools and supplies to complete lawn and household projects.
- Sophisticated Squires shop at suburban classics such as L.L. Bean, Lands' End and Eddie Bauer.



Regional Profile

The Regional Profile represents a wider range of Segments, and exhibits upper-middle affluence levels.

Tapestry Segments | North County Residents vs. Regional Profile



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Affluence Range

\$

Segment Spotlight

21 Urban Villages (7.5%) – Indexed 586 against the U.S. average

- See slide 38.

10 Pleasant-Ville (7.4%) – Indexed 414 against the U.S. average

- See slide 38.

35 International Marketplace (5.5%) – Indexed 363 against the U.S. average

- These neighborhoods are developing urban markets with a rich blend of cultures and household types.
- The median age is 30 and the median HHI is \$42,000.
- Families with children represent 44% of the population.
- They shop at Target, Wal-Mart, Macy's, Marshalls, and 7-Eleven.
- They are movie buffs who also enjoy watching television.
- Part time jobs are prevalent and unemployment is above average.

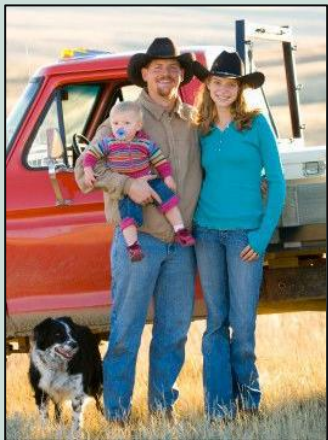
27 Metro Renters (5.2%) – Indexed 479 against the U.S. average

- Young, well educated singles (1/3 have bachelor's degree) beginning their professional careers in large cities like NYC, Chicago, and L.A.
- The median age is 38 and the median HHI is \$50,400.
- Favorite stores include Bloomingdale's, Banana Republic, The Gap, and Macy's.
- They work out regularly, buy organic food, attend concerts, enjoy dancing, and read books and magazines.
- Surfing the Internet is important to this group who is always on the go.

Segment Spotlight

04 Boomburbs (4.6%) – Indexed 164 against the U.S. average

- Newest additions to the suburbs; younger families with a busy upscale lifestyle.
- Fastest growing market in US at 6% annually.
- Median age is < 34 and median HHI is \$100,000+.
- Little ethnic diversity; population is predominantly white.
- Product preferences reflect suburban lifestyle. Purchase everything from household furnishings and baby furniture to cars and camcorders.
- Boomburbs drive SUV's and are very active; they favor golf, tennis and swimming.
- Buy food at upscale grocery stores like Harris Teeter.
- Technically savvy; own PDAs, computers, MP3 player, etc. Their children represent top market for video game and PC use.



Segment Commonalities

	North County Residents		Regional Profile	
1	21 Urban Villages	10.2%	21 Urban Villages	7.5%
2	10 Pleasant-Ville	8.1%	10 Pleasant-Ville	7.4%
3	58 NeWest Residents	7.5%	35 International Marketplace	5.5%
4	09 Urban Chic	7.4%	27 Metro Renters	5.2%
5	06 Sophisticated Squires	6.1%	04 Boomburbs	4.6%
6	12 Up and Coming Families	6.0%	47 Las Casas	4.5%
7	35 International Marketplace	5.9%	58 NeWest Residents	4.4%
8	47 Las Casas	4.4%	03 Connoisseurs	4.3%
9	28 Aspiring Young Families	4.2%	09 Urban Chic	4.2%
10	03 Connoisseurs	3.3%	23 Trendsetters	3.7%

Observations:

- The North County Resident and Regional Profiles share seven similar segments, indicating significant similarities in lifestyles and preferences between the two profiles.
- The marked similarities between the profiles may also mean efforts to please North County residents will speak to Regional residents as a whole.
- The top segments in both profiles display a fair amount of diversity in both lifestages and levels of affluence.

Segment Commonalities

	North County Residents		Carlsbad		Escondido	
1	21 Urban Villages	10.2%	09 Urban Chic	35.6%	58 NeWest Residents	17.5%
2	10 Pleasant-Ville	8.1%	03 Connoisseurs	7.8%	21 Urban Villages	15.2%
3	58 NeWest Residents	7.5%	13 In Style	7.4%	35 International Marketplace	11.7%
4	09 Urban Chic	7.4%	01 Top Rung	6.2%	10 Pleasant-Ville	6.8%
5	06 Sophisticated Squires	6.1%	12 Up and Coming Families	6.1%	06 Sophisticated Squires	5.0%
6	12 Up and Coming Families	6.0%	23 Trendsetters	5.5%	47 Las Casas	4.7%
7	35 International Marketplace	5.9%	04 Boomburbs	4.9%	03 Connoisseurs	3.9%
8	47 Las Casas	4.4%	02 Suburban Splendor	4.4%	52 Inner City Tenants	3.8%
9	28 Aspiring Young Families	4.2%	05 Wealthy Seaboard Suburbs	4.2%	36 Old and Newcomers	3.5%
10	03 Connoisseurs	3.3%	06 Sophisticated Squires	3.3%	28 Aspiring Young Families	3.4%
	Oceanside		San Marcos		Vista	
1	06 Sophisticated Squires	12.9%	12 Up and Coming Families	25.0%	47 Las Casas	16.3%
2	21 Urban Villages	12.1%	58 NeWest Residents	12.7%	21 Urban Villages	13.3%
3	10 Pleasant-Ville	11.6%	21 Urban Villages	12.5%	10 Pleasant-Ville	11.6%
4	28 Aspiring Young Families	6.6%	22 Metropolitans	7.7%	35 International Marketplace	9.6%
5	36 Old and Newcomers	5.0%	35 International Marketplace	5.2%	28 Aspiring Young Families	7.6%
6	38 Industrious Urban Fringe	4.3%	01 Top Rung	5.0%	13 In Style	6.0%
7	24 Main Street, USA	4.2%	05 Wealthy Seaboard Suburbs	5.0%	58 NeWest Residents	5.9%
8	43 The Elders	4.0%	49 Senior Sun Seekers	4.4%	39 Young and Restless	5.1%
9	09 Urban Chic	3.9%	30 Retirement Communities	3.0%	12 Up and Coming Families	3.8%
10	47 Las Casas	3.7%	06 Sophisticated Squires	2.8%	16 Enterprising Professionals	2.6%

North County and Regional Lifestyles

Once segments have been identified, we can draw conclusions about consumer habits and lifestyle preferences.

Lifestyle/Media Groups:

Apparel, Appliances, Attitudes, Automobiles,
Auto/Aftermarket, Baby Products, Alcohol, Books,
Cameras, Civic Activities, Convenience Stores, Electronics,
Financials, Furniture, Garden/Lawn, Grocery, Health,
Home Improvement, Insurance, Internet, Leisure, Yellow
Pages, Watch, Read, Listen, Personal Core, Pets,
Restaurant, Shopping, Smoking, Sports, Telephone, Tools,
Toys/Games, Travel, Video/DVDs, Miscellaneous.

Profile Comparison

North County Residents

Electronics / Internet	Index
Rented video tape/DVD last month: foreign	228
Ordered on Internet/12 mo: flowers	214
Internet last 30 days: traded/tracked investments	208
Ordered on Internet/12 mo: airline ticket	202
Internet last 30 days: made travel plans	198

Grocery	Index
Shopped at grocery store/6 mo: Vons	447
Shopped at grocery store/6 mo: Stop`N Shop	342
Shopped at grocery store/6 mo: Pathmark	333
Shopped at grocery store/6 mo: IGA	33
Shopped at grocery store/6 mo: Piggly Wiggly	31

Leisure	Index
Gambled in Atlantic City in last 12 months	209
Gambled in Las Vegas in last 12 months	175
Attended movies in last 90 days: once/week or more	174
Bought book at Borders in last 12 months	170
Attended classical music/opera performance/12 mo	169

Regional Profile

Electronics / Internet	Index
HH owns any Apple/Apple Mac clone brand PC	267
Rented video tape/DVD last month: foreign	228
Ordered on Internet/12 mo: flowers	214
Internet last 30 days: traded/tracked investments	208
DVDs purchased in last 30 days: 5+	80

Grocery	Index
Shopped at grocery store/6 mo: Vons	466
Shopped at grocery store/6 mo: Stop`N Shop	366
Shopped at grocery store/6 mo: Pathmark	345
Used nectars in last 6 months	339
Shopped at grocery store/6 mo: Whole Foods Market	325

Leisure	Index
Member of veterans club	240
Gambled in Atlantic City in last 12 months	216
Gambled in Las Vegas in last 12 months	199
Attended classical music/opera performance/12 mo	194
Bought book at Borders in last 12 months	186

Data includes national chains that may not be present in your region, but represent the type of consumer behavior likely.

Profile Comparison

North County Residents

Listen	Index
Radio format listen to: Hispanic	994
Radio format listen to: all news	314
Radio format listen to: jazz	230
Radio format listen to: classical	177
Radio format listen to: country	54

Read	Index
Read travel magazines	174
Read airline magazines	171
Read women`s fashion magazines	166
Read computer magazines	147
Read fishing/hunting magazines	57

Watch	Index
Watched any pay-per-view sports event last 12 mo	166
Watched last week: MTV2	159
Watched last week: Cinemax	159
Watched last week: BBC America	154
Watched last week: CMT (Country Music Television)	55

Regional Profile

Listen	Index
Radio format listen to: Hispanic	801
Radio format listen to: all news	331
Radio listening: golf	253
Radio format listen to: jazz	247
Radio format listen to: public	233

Read	Index
Read airline magazines	216
Read women`s fashion magazines	204
Read travel magazines	185
Read business/finance magazines	156
Read fishing/hunting magazines	56

Watch	Index
Watch TV aired once/wk: NBC Meet the Press	203
Watch Syndicated TV (M-F): Jeopardy!	169
Watched last week: BBC America	167
Watch TV aired once/wk: The Office	161
Watched last week: CMT (Country Music Television)	53

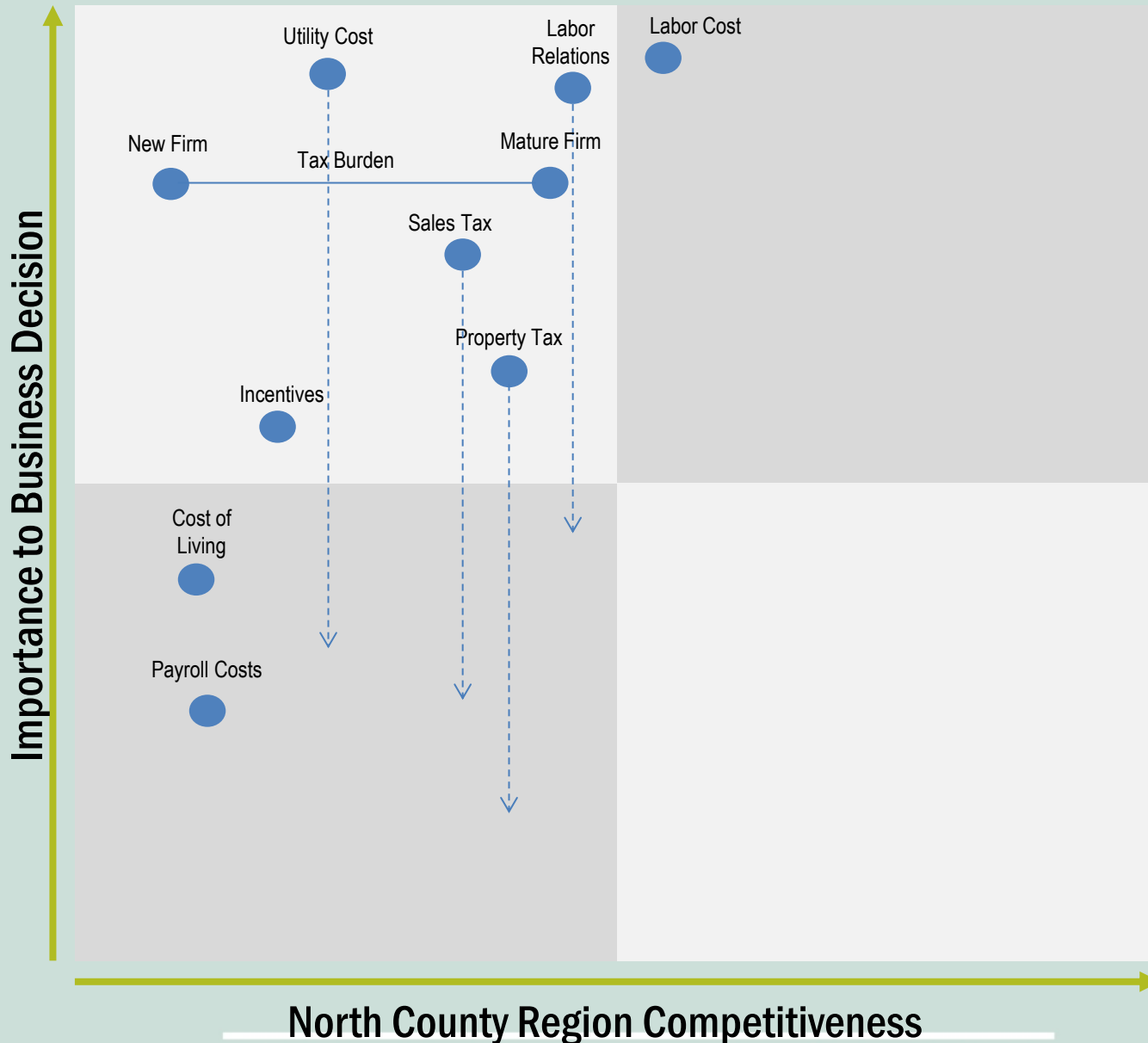
Data includes national chains that may not be present in your region, but represent the type of consumer behavior likely.



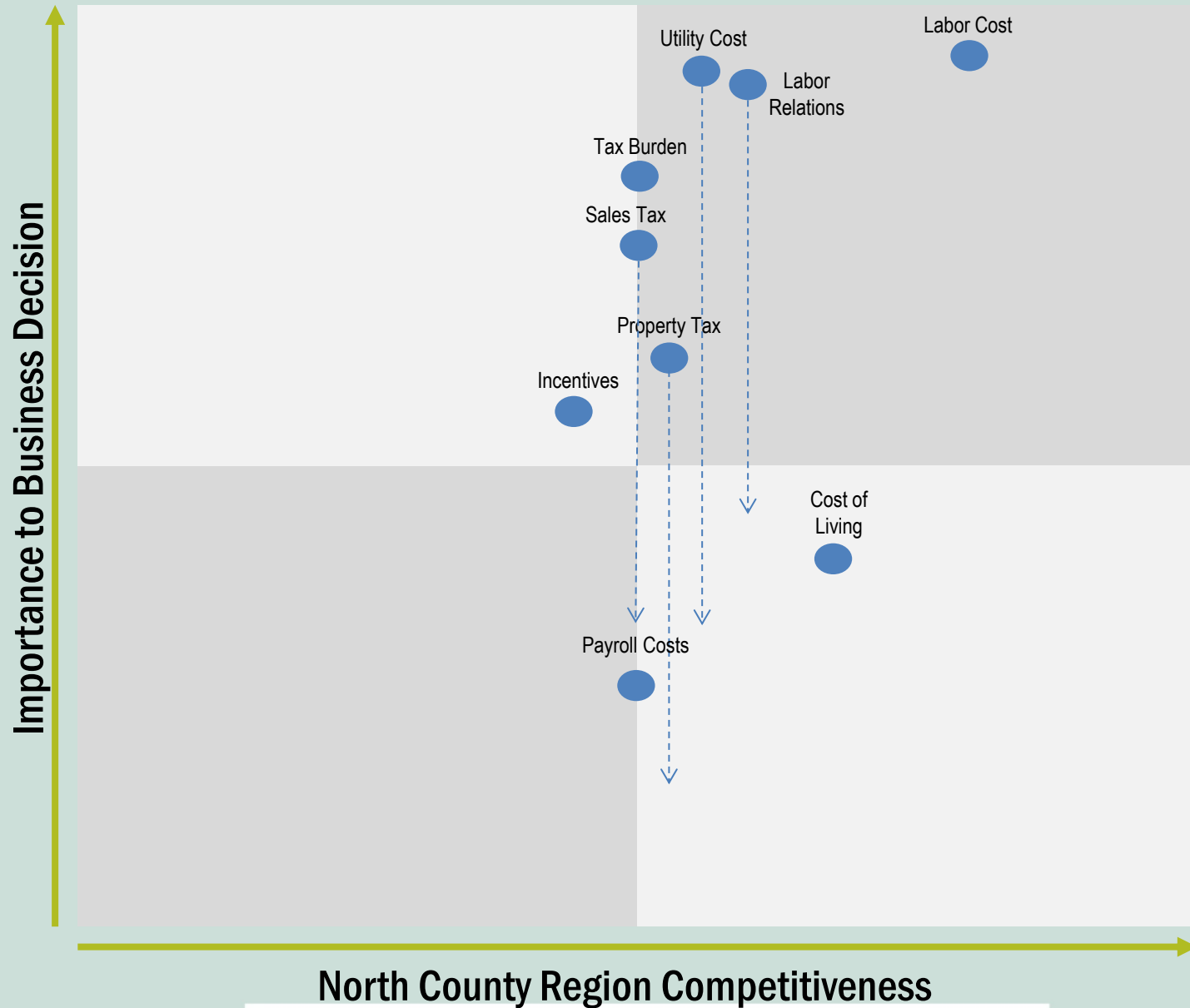
ASSET MAPPING

North County Communities along the 78 Corridor

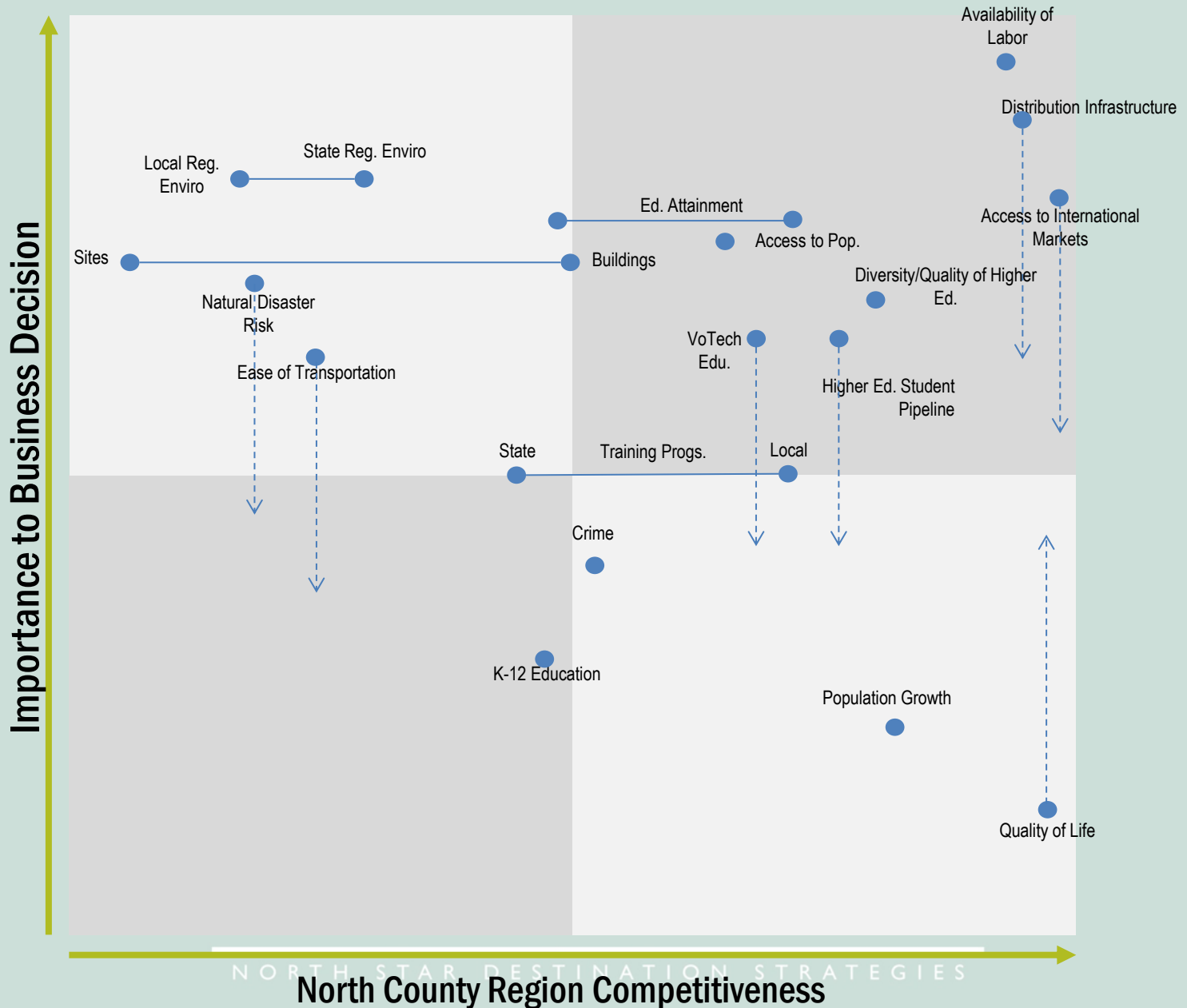
General Business Costs Asset Map (Compared to the US)



General Business Costs Asset Map (CA & Surrounding Regions)



General Conditions Asset Map

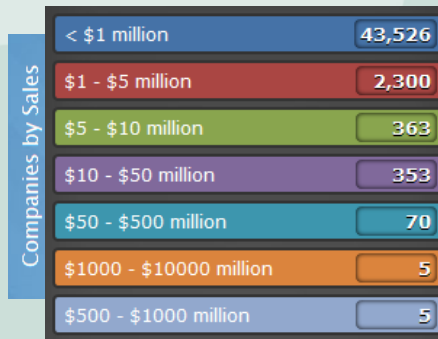
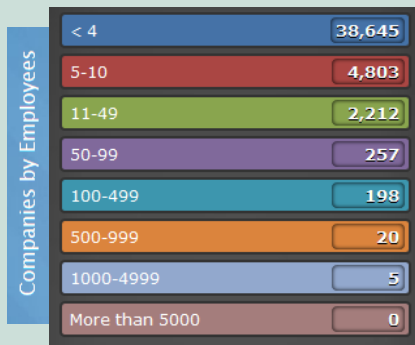
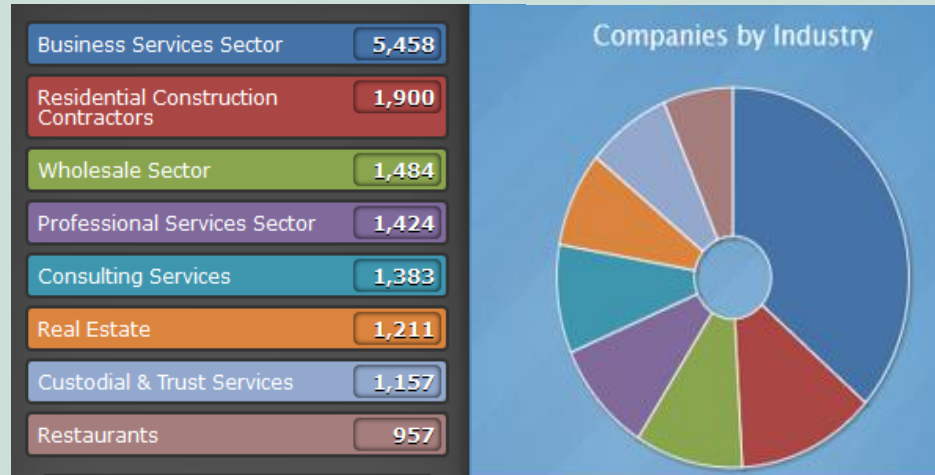




TOP BUSINESS PROSPECTS

North County Communities along the 78 Corridor

North County Business Profile



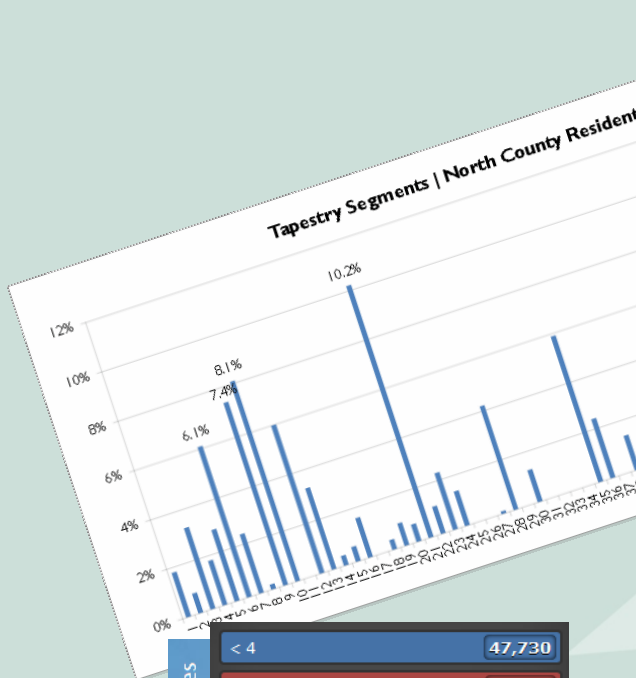
North County Growth Sectors

Industry code	Industry title	2011 Est	2011 Emp	2011 TAW	2012 Est	2012 Emp	2012 TAW	Est Del1Y	Emp Del1Y	TAW Del1Y	2012AAW	2011AAW	2007 EST	2007 Emp	2007 TAW	2007AAW	Est Del5Y	Emp Del5Y	TAW Del5Y
5417	Scientific research and development services	631	29,327	4,033,220,361	679	29,354	4,119,654,187	48	27	85,433,826	140,310	137,526	537	24,320	2,367,668,053	97,319	142	5,025	1,750,985,134
6223	Other hospitals	18	0	0	27	4,962	304,265,185	9	4,962	304,265,185	61,319	#DIV/0!	22	0	0	0	5	4,962	304,265,185
6211	Offices of physicians	2367	25,157	206,285,891	2398	25,732	216,298,404	31	575	100,125,354	84,058	81,999,3915	2238	21,147	156,100,660	73,817	162	4,585	601,979,445
9999	Unclassified	6171	5855	2969,15968	5537	4374	22,750,7291	-534	-1481	-69,489,877	52,014	50711,5231	711	838	37,137,088	44,316	4,926	3,339	190,370,203
5416	Management and technical consulting services	3000	18838	1275,924,472	3280	17815	14317,95191	280	977	165,737,719	80,389	57,930,5245	2933	15,126	110,523,4645	73,089	347	2,889	328,530,548
6233	Community care facilities for the elderly	276	8190	2094,49505	292	8504	2242,39973	14	314	147,903,323	26,369	25,573,8278	254	5947	143,952,503	24,206	38	2,557	80,287,470
4529	Other general merchandise stores	176	8785	24,346,6524	177	9057	25,497,4901	1	272	115,082,777	28,152	27,713,9014	214	6639	211,204,002	31,813	(37)	2,418	43,770,899
2211	Power generation and supply	17	0	0	24	2398	28,999,5720	7	2398	28,999,5720	120,932	#DIV/0!	15	0	0	0	9	2,398	289,995,720
4841	General freight trucking	223	2218	87,502,223	237	2378	94,692,862	14	160	71,906,39	39,820	394,50,9572	2	0	0	0	235	2,378	94,692,862
6215	Medical and diagnostic laboratories	156	3229	296,424,680	165	4030	32,103,2974	9	801	24,408,285	70,661	91,800,7708	126	1840	11,601,2336	63,050	30	2,190	205,020,638
6231	Nursing care facilities	99	9505	290,362,563	110	9459	298,227,788	11	-45	78,642,225	31,528	30,548,4022	77	7393	214,503,093	29,014	33	2,066	83,723,695
5511	Management of companies and enterprises	355	17324	17,150,30538	370	18217	20,970,01943	15	893	38,197,1305	115,112	98,997,3758	354	16206	110,250,8825	67,780	16	1,951	994,493,018
6110	Other schools and instruction	429	4110	9574,4404	467	4254	10,706,6475	38	144	113,220,71	25,168	23,295,4754	363	2557	46,994,619	17,687	104	1,597	80,071,858
5415	Computer systems design and related services																		
6213	Offices of other health practitioners																		
3121	Beverage manufacturing																		
5419	Other professional and technical services																		
6216	Home health care services																		
3254	Pharmaceutical and medicine manufacturing																		
8121	Personal care services																		
4234	Commercial equip. merchant wholesalers																		
6241	Individual and family services	467	8291	243,220,863	492	8821	25,670,4690	25	530	134,838,27	29,102	29,335,528	468	7991	21,264,9725	27,649	26	1,130	44,054,965
6111	Elementary and secondary schools	185	6648	27,352,6528	242	8152	33,135,419	57	1506	5,780,9491	40,645	41,156,6247	204	7087	26,126,9785	36,886	38	1,065	70,068,634
4244	Grocery and related product wholesalers	300	4942	24,022,290	308	5255	25,508,17580	2	314	87,940,90	47,720	48,972,6609	294	4198	19,582,3198	45,885	14	1,058	53,984,362
4242	Druggists' goods merchant wholesalers	114	2077	25,485,8734	117	2018	30,777,95952	3	-59	52,957,218	152,525	122,695,587	118	992	105,685,3510	106,707	1	1,028	201,942,442
4541	Electronic shopping and mail-order houses	187	2139	11,696,6591	192	2368	14,110,4764	5	249	24,130,073	59,089	54,682,885	159	1391	80,907,653	58,223	33	997	60,117,111
3345	Electronic instrument manufacturing	137	9,385	880,493,196	144	9,396	882,705,322	7	11	12,212,126	95,009	93,819	136	8503	71,833,3499	84,480	8	893	174,371,823
3391	Medical equipment and supplies manufacturing	161	6121	47,708,264	163	5987	48,406,6593	2	-134	73,583,29	80,853	77,880,7818	166	5152	37,174,4883	72,155	(3)	835	112,321,710



- ❖ 5417 Scientific research and development services
- ❖ 5416 Management and technical consulting services
- ❖ 6215 Medical and diagnostic laboratories
- ❖ 5511 Management of companies and enterprises
- ❖ 5415 Computer systems design and related services
- ❖ 3254 Pharmaceutical and medicine manufacturing
- ❖ 4234 Commercial equipment merchant wholesalers
- ❖ 3345 Electronic instrument manufacturing
- ❖ 4841 General freight trucking
- ❖ 3121 Beverage manufacturing
- ❖ 4244 Grocery and related product wholesalers
- ❖ 4541 Electronic shopping and mail order houses

Geographical Footprint Select Sector Profile



Consulting Services	22,912
Information Technology Services	8,678
Trucking	5,416
Food Wholesalers	3,557
Advertising & Marketing Services	3,355
Scientific Research & Development Services	2,151
Investment Firms	1,894
Computer & Office Equipment Wholesalers	1,756



Companies by Employees

< 4	47,730
5-10	7,233
11-49	4,272
50-99	705
100-499	580
500-999	73
1000-4999	64
More than 5000	20

Companies by Sales

< \$1 million	53,621
\$1 - \$5 million	4,869
\$10 - \$50 million	898
\$5 - \$10 million	873
\$50 - \$500 million	172
\$500 - \$1000 million	12
\$1000 - \$10000 million	11
> \$10000 million	2

Non-Public	60,715
Owned by a Public Company	327
Public	49

Single Location	59,334
Headquarters	1,757

North County Top Business Prospects

- ❖ 5417 Scientific research and development services
- ❖ 3254 Pharmaceutical and medicine manufacturing
- ❖ 5416 Management and technical consulting services
- ❖ 4234 Commercial equipment merchant wholesalers
- ❖ 5415 Computer systems design and related services
- ❖ 4841 General freight trucking

Information Technology Services	50
Consulting Services	49
Scientific Research & Development Services	26
Computer & Office Equipment Wholesalers	22
Pharmaceutical Manufacturing	20
Medical Equipment & Supply Wholesalers	16
Truckload Carriers	11
Trucking	9



Companies by Employees

100-499	218
500-999	15
1000-4999	10

Companies by Sales

\$10 - \$50 million	167
\$50 - \$500 million	39
\$5 - \$10 million	18
\$1 - \$5 million	9
\$500 - \$1000 million	3
> \$10000 million	2
\$1000 - \$10000 million	1
< \$1 million	1

Top Business Prospects

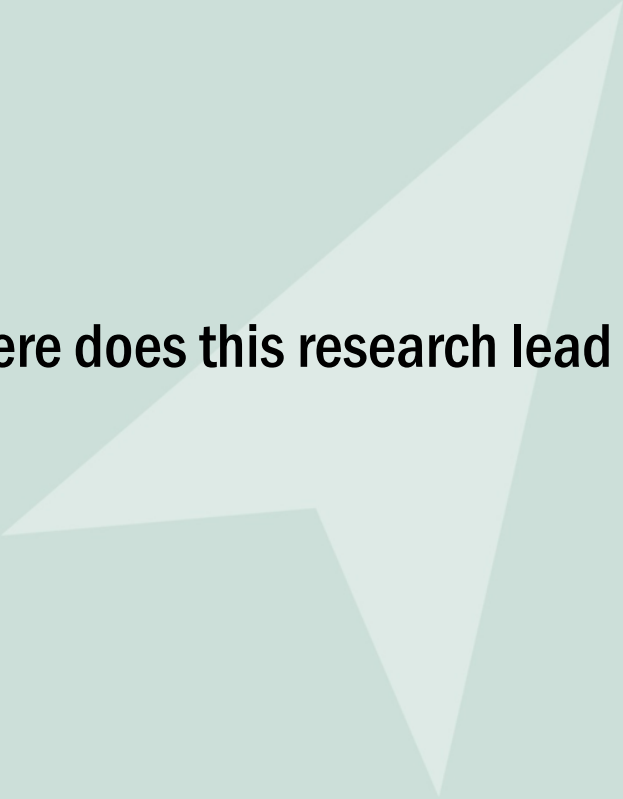
	Company Name	Primary Address 1	Primary City	Primary State	Primary Zip	Phone Number	Contact Prefix	Contact First Name	Contact Last Name	Contact Title	Employees At Location	Line Of Business	
32	Avery Corp	150 N Orange Grove Blvd	Pasadena	CA	91103	626-304-2000		Donovan	Figueira	President	200	Commercial physical research, nsk	www.avery.com
33	Avery Corp	150 N Orange Grove Blvd	Pasadena	CA	91103	626-304-2000		Donovan	Figueira	President	200	Commercial physical research, nsk	www.avery.com
34	AXM Pharma, Inc.	20955 Pathfinder Rd #100	Diamond Bar	CA	91785		Ms.	Wei Shi	Wang	Chairman & CEO	150	Pharmaceutical preparations	http://www.axm.com
35	B Jacqueline and Associates Inc	1192 N Lake Ave	Pasadena	CA	91104	626-844-1400	Ms	Jacqueline	Buickians	President/CEO	300	Custom computer programming services, nsk	www.jba.com
36	Baxter Bioscience	1700 Rancho Conejo Blvd	Newbury Park	CA	91320	805-498-8988		Jennifer	Re	Manager	600	Medicinals and botanicals, nsk	www.baxter.com
37	BDS Marketing, Inc.	10 Holland	Irvine	CA	92618	949-472-6700	Mr.	Mike	Skinner	Chief Information Officer	120	Advertising agencies, nsk	http://www.bds.com
38	Beating Wall Street Inc	10915 Danube Ave	Granada Hills	CA	91344	818-332-9696		Hamed	Khorsandi	President	230	Management consulting services	www.beatingwallstreet.com
39	Beckman Coulter, Inc.	250 S. Kraemer Blvd.	Brea	CA	92822	714-993-5321	Mr.	Arnd	Kaldowski	President	1200	Analytical instruments, nsk	http://www.beckmancoulter.com
40	Beckman Research Institute of The City of Hope	1500 Duarte Rd	Duarte	CA	91010	626-359-8111	Mr	Harlan	Levine	CEO	250	Noncommercial research organizations, nsk	www.coh.org
41	Best Overnight Express, Inc.	406 Live Oak Ave	Irwindale	CA	91706	626-256-0550	Mr	William	Applebee	President/CEO	100	Local trucking, without storage, nsk	www.bestovernight.com
42	Biosearch Technologies, Inc.	2199 S McDowell Boulevard Ext	Petaluma	CA	94954	415-883-8400	Mr	Ron	Cook	President/CEO	120	Biological products, except diagnostic	www.biosearch.com
43	Bib Resources, Inc.	16845 Von Karman Ave #100	Irvine	CA	92606	949-261-9155	Ms	Denise	Johnson	CFO	105	Management consulting services	www.bibresources.com
44	Brentwood Biomedical Research Institute, Inc.	11301 Willis Blvd Bldg 114 Bldg 114	Los Angeles	CA	90073	310-312-1554		Thoyd	Ellis	CFO	130	Noncommercial research organizations, nsk	www.brentwoodbiomedical.com
45	Burbank Dental Laboratory, Inc.	2101 Floyd St	Burbank	CA	91504	818-841-2256	Mr	Dan	Hoffman	Director Manager	100	Medical and hospital equipment, nsk	www.burbankdental.com
46	Button Transportation, Inc.	8034 Schroeder Rd	Dixon	CA	95620	707-678-1983	Mr	Robert	Button	President	125	Trucking, except local	www.buttontrans.com
47	Cafta	16625 Gridley Rd Unit 5	Cerritos	CA	90703	562-860-9808		Tianfu	Guo	CEO	108	Medical and hospital equipment, nsk	
48	Cameron Health, Inc.	905 Calle Amanecer #300	San Clemente	CA	92673	949-498-5630	Mr	Mark	Schroeder	President	100	Medical and hospital equipment, nsk	www.cameronhealth.com
49	Canon Business Solutions-West, Inc.	110 W Walnut St	Gardena	CA	90248	310-217-3000	Mr	Art	McGinn	Vice President	450	Office equipment	www.gmdh.com
50	Canon Development Americas, Inc.	15975 Alton Pkwy	Irvine	CA	92618	949-932-3100		Gregory	Lovell	Executive Manager	200	Custom computer programming services, nsk	www.gmdh.com
51	CB Richard Ellis Investors, Inc.	515 Suth Flwr St Flr 31 Flr 31	Los Angeles	CA	90071	213-683-4200	Mr	Robert	Zerbst	President	100	Management consulting services	www.cbregl.com
52	CDSNet, Inc.	6053 W Century Blvd Ste 9	Los Angeles	CA	90045	213-427-2000	Mr	George	Armstrong	Manager	100	Data processing and preparation	http://www.cdsnet.com
53	Ceira Technologies Inc	1920 Main St Ste 40	Irvine	CA	92614	949-223-1700	Mr	Matthew	Ghourdjian	President/CEO	120	Computer related services, nec, nsk	www.cogility.com
54	Chc Consulting LLC	1700 E Garry Ave Ste 210	Santa Ana	CA	92705	949-250-0004	Ms	Susan	Cook	President	100	Business consulting, nec, nsk	www.chcco.com
55	CITRIX ONLINE LLC	7414 Hollister Ave	Goleta	CA	93117	805-690-6400	Ms	Grace	Burns	Executive Manager	500	Custom computer programming services, nsk	www.citrix.com
56	COMMERCIAL PROGRAMMING SYSTEMS, INC.	4400 Coldwater Canyon Ave #200	Studio City	CA	91604	323-851-2681	Mr	Alan	Strong	Chairman & CEO	146	Computer related services, nec, nsk	www.cpsinc.com
	Communication Information Corporation	2445 Mission La	Quincy	CA	92606	949-932-3100	Mr	James	Spencer	President	400	Business consulting, nec, nsk	www.cic.com

D&B Top Prospects, North County

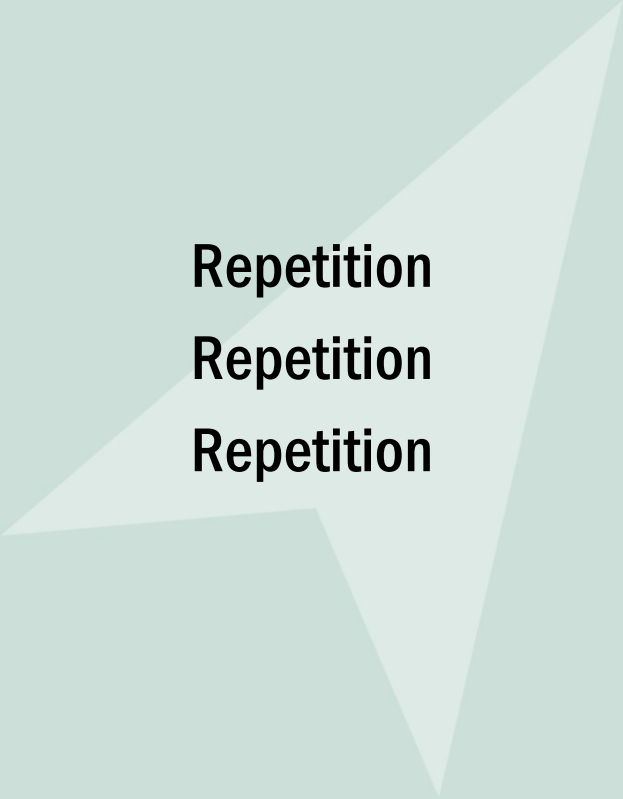


Insights

Conclusions based on research



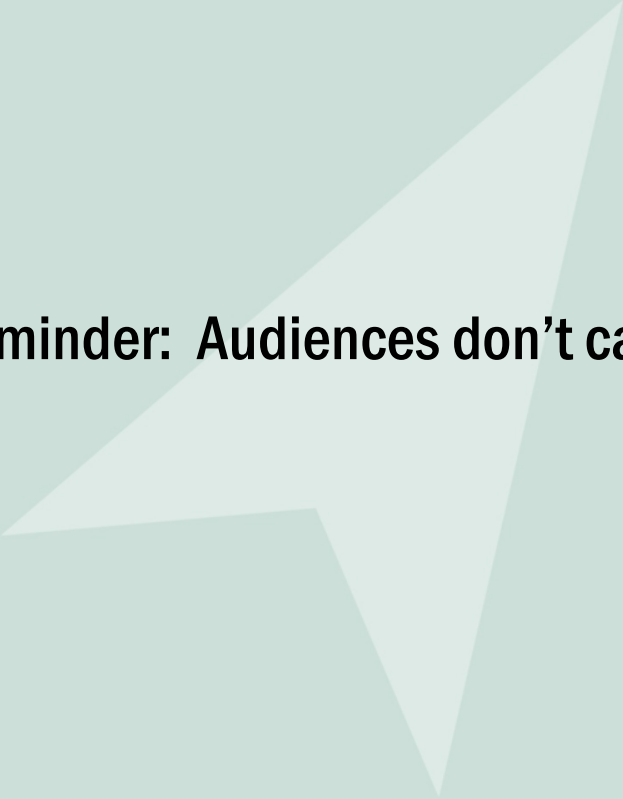
Where does this research lead us?



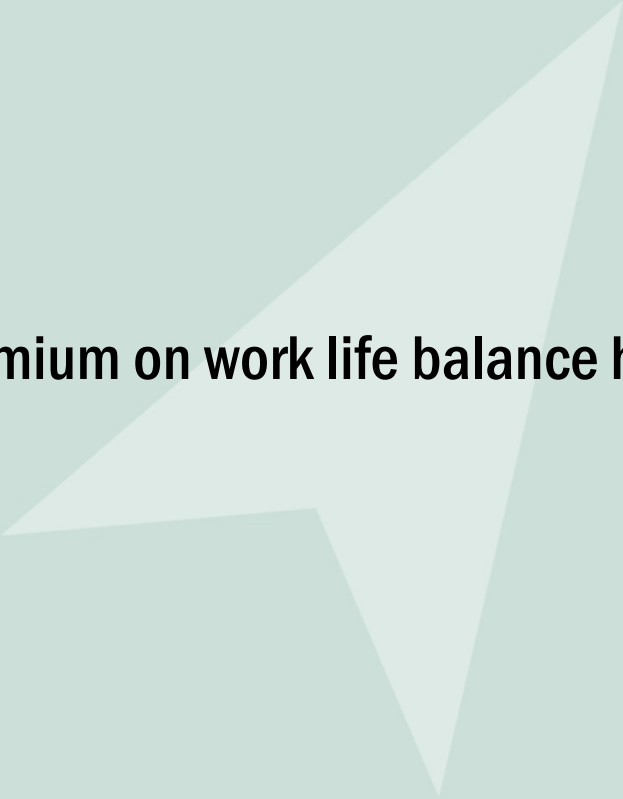
**Repetition
Repetition
Repetition**



Abundance of talent
Educated workforce
Lower cost of doing business
Ease
Access to markets
Lower tax burdens for specific industries
Entrepreneurial culture
Great quality of life



Reminder: Audiences don't care.



Premium on work life balance here.

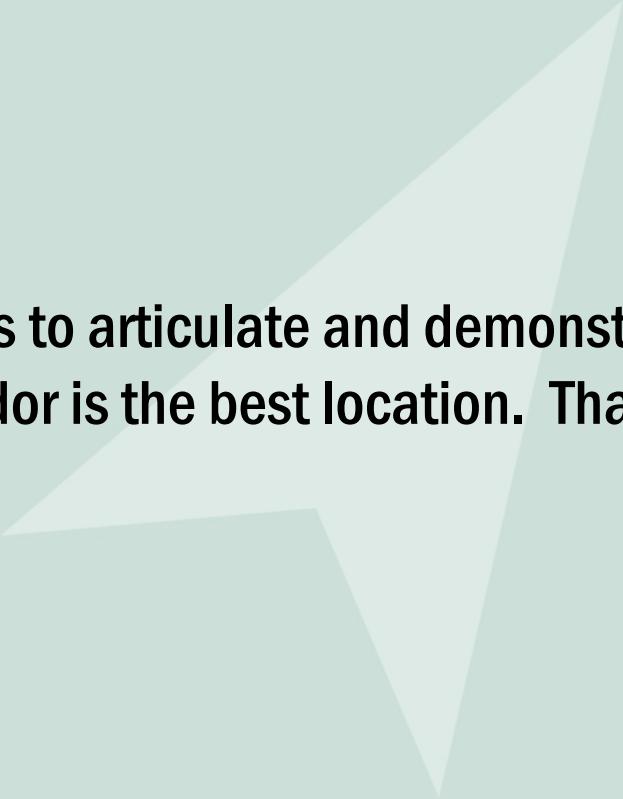
Gallup Poll: The most important aspects motivating people to connect and attach themselves to their community are:

**social offerings
welcoming nature
attractive appearance**

SIMPLY FUN, FRIENDLY, & PRETTY.



Positioning helps us market. Why is our area the best?



The job of the brand is to articulate and demonstrate why North County along the 78 corridor is the best location. That requires contrast.

North County Brand Platform

Target Audience:

For businesses that want to strike the perfect work-life balance,

Frame-of-Reference:

North County San Diego, strategically located in Southern California, offers limitless opportunities

Point-of-Difference:

where superior quality of life combines with business innovation

Benefit:

allowing you to truly have it all.

What this means for business:

- **Work life balance is easier here and healthy, active lifestyles make happy employees.**
- **Unmatched talent pool of creative and critical thinkers.**
- **Room to expand or diversify.**
- **Advantages over the rest of the County in 3 key areas for site selectors: cost of doing business, business conditions, access to talent.**
- **Easy access to world's largest economies.**
- **Leading edge of growth and opportunity for established technology and life sciences sectors**

📌 What this means for visitors:

- Perfect weather (no trip insurance needed)
- Center of Southern California tourism (yet affordable): halfway between Disney and Sea World
- Triathlons and other active races
- Surf culture and outdoor recreation
- People travel to locations with an enviable quality of life

What this means for residents:

- **Shorter commutes with less traffic; more time for family**
- **All the educational opportunity you seek; great schools (much improved)**
- **Affordable real estate (or more land and house for your dollar)**
- **Safe and happy kids**
- **World's best quality of life.**

🔺 **What this means for the region:**

- Provides foundation for consistent narrative and tone.
- Brings communities together for a common vision of growth and progress.
- It serves the interests of site selectors by focusing on an area rather than a particular city so you can leverage the strengths and limitless opportunities (of the whole) in a cohesive manner.
- Creates a strong sense of regionalism so that a win for one is not a loss for the other four.
- Establishes a network and culture of collaboration among communities, leaders, and the private sector.



Congratulations!

As each bird flaps its wings, it creates uplift for the bird following. In a V formation, the whole flock adds at least 71% more flying range than if each bird flew alone.



Annie Reb

Like geese....



...communities who share a common direction
can get where they are going quicker and easier
than those who try
to go it alone.

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Next Steps

- ▶ **Approval of Brand Platform (strategy)**
- ▶ **Development of Creative Concepts**
- ▶ **Creative Concepts Presentations (Online to small creative committee of 4-5)**
- ▶ **Approval of Creative Concept**
- ▶ **Development of Creative Elements in Brand Identity Guide**
 - **Logo, Strapline, Creative Expressions of the Brand**
 - **Brand Action recommendations**
- ▶ **Final Online Presentation**
- ▶ **Assembly of Final BrandPrint Report**



Thank you North County.

Ed Barlow

Vice President / Director of Planning
ed@northstarideas.com