



TARGET SECTOR ANALYSIS AND MARKETING REVIEW GREATER MANHATTAN (KS) PROJECT

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OVERVIEW

Greater Manhattan, Kansas, known to many as The Little Apple® is a dynamic, growing community with a progressive attitude and commitment to building a better future for its residents and businesses. Home to world-class assets such as Kansas State University, Fort Riley, and the future National Bio and Agro-Defense Facility (NBAF) a state-of-the-art, biocontainment laboratory for the study of diseases that threaten both America's animal agricultural industry and public health is set to open in 2022, Greater Manhattan is poised to become an even more competitive destination for jobs and talent.

Even with its impressive assets, Manhattan – like all regions– must continue to evolve and improve to better compete in the changed economic landscape of the New Economy. In service to this goal, Manhattan Area leaders have initiated the Greater Manhattan Project to create a consensus-based vision for the next five years and beyond in the region.

Supported by the “Power Our Potential” initiative of the Manhattan Area Chamber of Commerce’s Advantage Manhattan economic development plan, the Greater Manhattan Community and Economic Development Strategy will bring the community together behind a consensus vision for a thriving, sustainable, and equitable future for the Central Flint Hills region. Extensive quantitative research will be paired with comprehensive outreach to Manhattan Area leaders and constituencies to inform the development of an action plan designed to be effectively implemented by the Chamber and its partners across the public and private sectors.

The final plan will incorporate actions and tactics designed to address challenges and capitalize on opportunities to grow good jobs, retain and attract top talent, enhance quality of life, and create wealth for current and future residents of Greater Manhattan.

STEERING COMMITTEE

A diverse Steering Committee of public and private leaders from across the Manhattan Area will oversee the Greater Manhattan Project process, discuss and approve all deliverables, and ensure that the strategy addresses the region's most critical issues and seeks to capture its highest value opportunities for the next five years.

STAKEHOLDER INPUT

Qualitative feedback is a vital component that will be used to inform subsequent phases in identifying strategic priorities for the Manhattan region. It will involve reaching out to as many regional stakeholders as possible through an online survey, individual interviews, and focus groups to help identify the region's strengths, weaknesses, opportunities, and challenges.

COMMUNITY ASSESSMENT

The Community Assessment took a detailed look at a diverse array of indicators that impact Greater Manhattan's economic competitiveness and compared these trends to three strong benchmark communities – **Columbia, Missouri, Fort Collins, Colorado, and Ames, Iowa** – the state of Kansas and the nation. Research and findings was structured according to key narrative "stories" that emerged from the analysis. To supplement the statistical data from local, state and national agencies, the Assessment fully leveraged the public input results.

TARGET SECTOR ANALYSIS & MARKETING REVIEW

This Analysis seeks to identify target business sectors with the greatest potential to drive job creation, elevate standards of living in Greater Manhattan, and catalyze growth and development. Research focuses not only on businesses, but the occupational concentrations that support them as well as innovation, infrastructure, and entrepreneurial capacities. The Marketing Review assesses the Advance Manhattan marketing program to determine its strengths, challenges, and future needs in the context of the broader Community and Economic Development Strategy.

COMMUNITY & ECONOMIC DEVELOPMENT STRATEGY

The Strategy represents the culmination of all the quantitative and qualitative research to date through the development of detailed action items geared towards addressing challenges and capitalizing on opportunities for a visionary future. The plan will be supported by innovative best practices successfully implemented by communities from around the country. Where possible, the Strategy will incorporate the numerous efforts already underway in Greater Manhattan.

IMPLEMENTATION PLAN

The Implementation Plan ensures that the Strategy is activated and sustained for the next five years and beyond. The Plan will formalize timelines for phasing in the Strategy's multiple actions, identify lead and support implementation entities, determine existing and necessary financial and personnel capacity to drive implementation, propose optimal staffing and governance operations, and confirm performance metrics to track implementation progress and success.

OUR APPROACH TO TARGETING

A target sector, or simply a “target,” is any type of business activity that an economic development organization and its partners strategically pursue for quality growth and development. In other words, a target is an area where financial and staff resources – and the programs and policies they support – are specifically focused. Targets are often those segments of the economy where there are existing competitive advantages and strong possibilities for growth and return on investment. Some communities choose to target sectors that are not presently concentrated in their community or characterized by an existing competitive advantage. This is because the area of activity is rapidly expanding or exhibits the potential to do so; still other communities select targets that align with complementary strategic objectives in the community. **Given Greater Manhattan’s reliance on public sector employment, this report will focus target identification on those areas of activity that have the greatest potential to create quality private sector job growth and investment over the next five years.**

It is important to note that some business sectors that are already important sources of local employment are not necessarily targets. At its core, **targeted economic development supports a net increase in prosperity for a community and its residents, which necessitates “exporting” goods and services.** Businesses that can sell a product or service to a consumer or end user outside of Greater Manhattan – whether abroad or in some other part of the United States – bring new wealth into the community that did not previously exist. This wealth then recirculates in the local economy, creating even more jobs and wealth. Economists refer to jobs in the export-oriented sectors as “traded” or “basic” employment.

By contrast, **sectors such as retail, food service, real estate and construction, and health care are typically “local serving.”** That is, they serve local populations and typically expand as a result of population growth. Their potential to bring in significant wealth from outside the community is limited. And as such, sectors like health care and retail are considered targets only in regions that are attracting significant numbers of outsiders who utilize these services. For instance, Rochester, Minnesota has a focus on “destination health care” due to the fact that people travel from all over the world to visit the Mayo Clinic.

While Greater Manhattan is a regional shopping and health care destination for the Flint Hills, the extent of these activities does not warrant a “targeted” approach. This does not exclude retail and health care development from strategic consideration in the forthcoming Community and Economic Development Strategy; however, Market Street does not feel that targeted marketing resources should be committed to these sectors at this time.

KEY CONCEPTS RELATED TO TARGET SECTOR DEVELOPMENT

CLUSTERS: Agglomerations – or “clusters” – represent groups of interrelated businesses that choose to co-locate. The historical growth of clustered economic activity in areas such as the Silicon Valley, Route 128 in Massachusetts, and the Research Triangle Park in North Carolina are well-developed case studies to which many other regions across the nation seek to mimic. There are countless examples of such clusters around

the country and the world. Clustering can occur among competing or cooperative firms for a variety of different reasons. For instance, a group of suppliers may choose to locate in proximity to a major manufacturer for research and development efficiencies and reduced transportation costs. Another example is the immense aerospace cluster developed around the Boeing Integrated Defense Systems operations in St. Louis, Missouri. Other firms may co-locate in a specific area in order to take advantage of a specialized labor pool or to be in close proximity to specific infrastructure.

While the factors that have led to clustering vary tremendously by region and sector, such agglomerations occur over time because a location has an asset base that affords the sector and the companies that operate within them some form of competitive advantage. As the cluster grows, so too do the benefits afforded to the companies within the cluster: the available workforce grows, the potential for collaboration expands, competition may drive down costs, and buyer and supplier networks expand, among other potential impacts.

TARGETS: A targeted sector – or simply a “target” – is any type of business activity that is strategically pursued by an economic development organization and its partners for quality growth and development. That is to say, a “target” is an area where financial and staff resources, and the programs and policies they support, are specifically focused. “Targets” are often those segments of an economy where competitive advantages exist, prospects for future growth are greatest, and return on investment is likely highest. A “target” can be a single business sector with high growth potential or a “cluster” of businesses in related sectors. Many communities choose to target business sectors that are not presently concentrated in their community or characterized by existing competitive advantages. This may be because such activities are rapidly expanding, exhibit potential to become clusters in the years and decades to come, or align with other strategic objectives of the community. The ultimate aim of “targeting” is not necessarily to create new clusters of business activity – communities with multiple clusters are rare and tend to be among the nation’s largest and most dynamic economies.

STRATEGIC CONSIDERATIONS FOR TARGET SECTOR DEVELOPMENT

UNDERSTANDING YOUR ASSET BASE: Strategic targeting is predicated upon a solid understanding of a community’s strengths and weaknesses, specifically as they relate to the needs of specific business sectors and the companies that operate within them. The factors that medium to large companies consider when evaluating a community as a potential location for a new facility are often referred to as **site location factors, site selection factors, or site considerations**. These factors vary tremendously by sector. Accordingly, communities that are able to offer such characteristics are better positioned to attract these kinds of operations. Understanding the community’s asset base – inclusive of a wide variety of these potential site location factors – is critical to understanding the community’s competitiveness for various business sectors. Likewise, an understanding of its deficiencies in terms of such site location factors will help the community identify areas that need further investment if the community wishes to transform such deficiencies into future assets.

A HOLISTIC APPROACH: Target business sectors reflect existing agglomerations of establishments with similar business activities that have likely flourished in a community because of an asset base that aligns with

that sector's primary site location considerations. Other sectors that share similar site location factors may not currently be concentrated in the community, but the aforementioned asset base could make the community an attractive location for these new activities. Accordingly, such sectors represent opportunities where the community may have a particularly high chance for success in marketing and recruitment efforts that seek to attract new corporate investments or relocations that would benefit from the community's existing asset base.

For decades many communities and their economic development organizations have exclusively associated "economic development" with "business recruitment." While the recruitment of new companies is an important component of any targeted economic development program, it is only "one leg of the stool." Any effort to develop target sectors and nurture employment growth within them must focus upon the needs of existing businesses as well as entrepreneurs. Holistic economic development must also address the community or region's asset base that supports the competitiveness of target business sectors and the companies that operate within them.

TARGET SECTOR ANALYSIS: APPROACH AND METHODS

Market Street's approach to target identification is rooted in a complete examination of the region's strengths and opportunities, including talent (the occupations and types of knowledge that support the region's business activities). This comprehensive, interrelated approach stands in contrast to the traditional "top down" approach long utilized in cluster identification and analysis. It recognizes the importance of talent and workforce sustainability to the business community. It is complemented by an evaluation of the region's business climate, networks, infrastructure, research assets, educational programs, and many other factors that influence site location decisions.

CLASSIFICATION: Our approach defines targets by their North American Industry Classification System (NAICS) codes. Though these codes are used to help quantify important employment trends and activity within each target, they should not be interpreted as rigid definitions of the composition of economic activity within a given target. Classification systems do not adequately capture certain niche technologies and opportunities that may deserve strategic attention in certain communities. We utilize the federal government's Standard Occupational Classification (SOC) system to classify occupations. SOC codes differ from NAICS in that they quantify worker's skill categories rather than the employment sector reported by their companies.

TARGET DEFINITIONS: The selection of NAICS subsectors and SOC occupations used to "define" the employment and skill sets of each target sector is made based on assessments of industrial categories published by the U.S. Bureau of Labor Statistics, U.S. Bureau of Economic Analysis, Economic Modeling Specialists International (EMSI), the U.S. Cluster Mapping Project, the U.S. Employment and Training Administration's Occupational Information Network (O*NET), and other resources. Due to data-reporting protocols and limitations in specificity of industrial classifications, definitions are intended to be approximations of targeted activity.

GEOGRAPHY: Business and workforce composition information contained within this report is based on an analysis of trends observed in Greater Manhattan which encompasses **Geary, Riley, and Pottawatomie counties**. As with the Community Analysis, Market Street and Manhattan Area leaders felt this geography best approximated the region's labor shed, a critical criterion for economic development analysis.

LOCATION QUOTIENTS: Location quotients (LQs) are used to measure the relative concentration of local employment in a given business sector or occupation. When applied to business sector employment, they measure the ratio of a business sector's share of total local employment to that business sector's share of total national employment. A business sector with LQ of 1.0 is exactly the same share of total local employment as that business sector's share of national employment. When a local business sector has a location quotient greater than 1.0, it signals that the sector is more heavily concentrated locally than it is nationwide. Those sectors with high LQs are often assumed to benefit from one or more sources of local competitive advantage. Location quotients can also be applied to occupational employment in the same manner that they are applied to business sector employment, helping to determine which occupations and corresponding skill sets are highly concentrated in the local workforce.

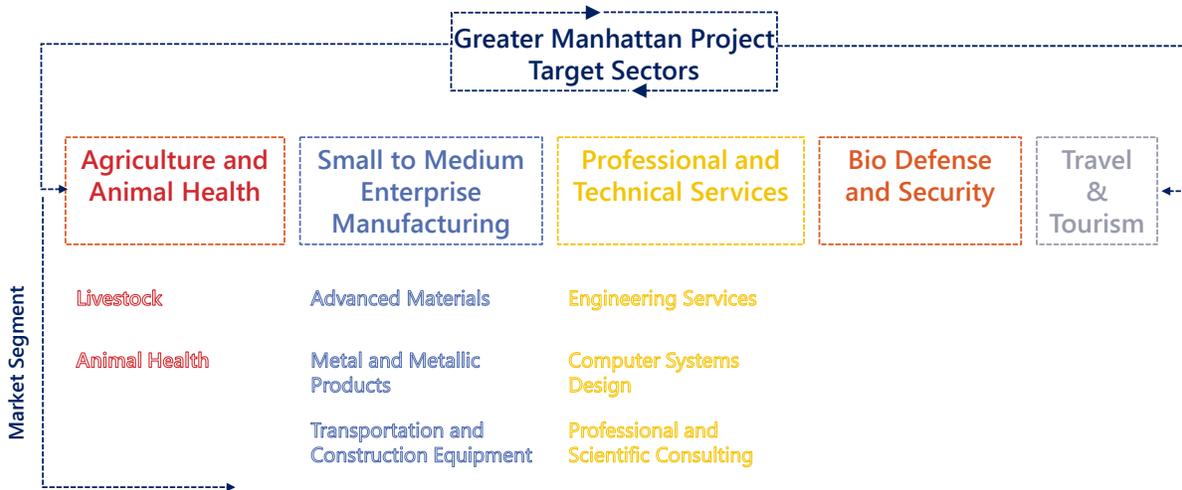
DATA SOURCES: Unless otherwise noted, all quantitative data contained in this report is sourced from Economic Modeling Specialists International, an industry-leading provider of proprietary data, aggregated from public sources such as the U.S. Census Bureau, the U.S. Bureau of Labor Statistics, the U.S. Bureau of Economic Analysis, the National Center for Education Statistics, and CareerBuilder, among many others.

MANHATTAN AREA TARGET SECTORS

As of 2016, the public sector in Greater Manhattan represented 45.3 percent of total regional employment. Buoyed by Fort Riley, Kansas State University, the Kansas Department of Agriculture, and the future National Bio and Agro-Defense Facility, Greater Manhattan has enjoyed prosperity and stability. But this dependence on public jobs has affected the region’s ability to attract and retain talent and leaves it susceptible to unanticipated troop movements, budget cuts, and global uncertainty. As such, **the focus of this Target Sector Analysis and Marketing Review is the enhancement of private sector employment growth in the Manhattan Area.** This includes a strong focus on the transformative opportunity provided by NBAF to spur corporate interest in Greater Manhattan from across the globe.

It is also important to note that these target sectors are not intended to supplant existing targets of the region’s various economic development organizations. **Rather, this Target Sector Analysis and Marketing Review should act as a framework for regional collaboration and projection of a unified voice to external audiences.** Some areas of Greater Manhattan may be more competitive for particular market segments or businesses than others. Leveraging the full offerings of the region will ensure shared prosperity among regional economic development partners and stakeholders.

Based on extensive analysis of Greater Manhattan’s workforce and economic structure, Market Street recommends five top-level target sectors for the community to pursue in order to achieve greater economic diversity and promote continued community prosperity.



The five target sectors in the preceding graphic represent private and public sector activity that best utilizes Greater Manhattan’s asset base, existing workforce and talent production strengths, and long-term potential for private sector employment growth. Under each target is a variety of market segments in which the Greater Manhattan region is particularly competitive to attract, retain, and develop within the region.

- ✓ **Agriculture and Animal Health** encompasses economic activity related to growing and sustaining the global food system, including crop and animal production. Animal health activity is focused on professional and scientific services that ensure the health and safety of individual or groups of animals. Though aspects of animal health are correlated with the **Bio-Defense and Security** target, animal health within this context pertains to animal livestock health, including veterinary services that promote animal wellbeing and reproductive health. Supporting institutional research capacities include the Beef Cattle Institute, the Center for Outcomes Research and Epidemiology, and the U.S.-China Center for Animal Health.
- ✓ **Small to Medium Enterprise (SME) Manufacturing** incorporates a diverse array of manufacturing activity that occurs throughout Greater Manhattan, including textile, agricultural machinery, and transportation and construction machinery production. Given the limited acreage of available sites in the region along with a tight labor market (signified by the region's low unemployment rate), it is recommended that Greater Manhattan focus targeting efforts on the attraction, retention, and expansion of manufacturing operations that utilize advanced automation and sophisticated computer controlled equipment or technologies.
- ✓ **Professional and Technical Services** aligns with the talent pipeline of Kansas State University's College of Engineering; College of Architecture, Planning, and Design; And College of Business Administration. The talent pool produced by K-State on an annual basis is a competitive advantage. Moreover, by increasing post-graduation employment opportunity the community may also realize other benefits such as reversing the region's historic net domestic outmigration trend. The Professional and Technical Services target includes architecture, engineering, management consulting, legal, and accountancy services.
- ✓ Based on breadth of current and future assets and depth of talent, the target with the most transformative growth potential is **Bio-Defense and Security**. The biggest draw of this sector is the National Bio and Agro-Defense Facility, planned to be the nation's foremost facility focused on research and development efforts to protect against diseases that threaten the national food supply and public health. The target is further supported by research at the Biosecurity Research Institute, the Center for Excellence for Emerging and Zoonotic Animal Diseases and the Center of Excellence for Vector-Borne Diseases.
- ✓ While job creation is a benefit of the **Travel and Tourism** target, employment is not its explicit focus. Rather, the Travel and Tourism target seeks to accomplish a critical goal for Greater Manhattan: counterbalancing net domestic outmigration. By inviting visitors into the region, the Manhattan Area can potentially convert visitors into future residents, or at the very least, create word-of-mouth buzz that might pull in new residents from major metropolitan markets throughout the United States. In addition, tourism-serving amenities make Greater Manhattan a more dynamic and competitive location for permanent residents.

Within each target sector are a number of market segments in which the region is particularly competitive. These segments could guide external marketing efforts, prioritize business retention and

expansion visits, or inform external marketing trips among economic development organizations operating in the region. In essence, segments drill each target down to an additional level of complexity to better differentiate competitive issues, opportunities, and growth strategies.

AGRICULTURE AND ANIMAL HEALTH

Definition and Overview: The Agriculture and Animal Health target captures crop and livestock production, government regulation and product promotion, and veterinary services that ensure the wellbeing and reproductive health of food animals. Along with these activities, the Agriculture and Animal Health target covers animal health research activities as well as the agriculture supply chain responsible for storing and distributing agricultural inputs and outputs. Kansas State University provides leading-edge animal health research capacity through the Beef Cattle Institute, the Center for Outcomes Research and Epidemiology, and the U.S.-China Center for Animal Health is a critical component of the target.

Company Composition: Local companies and public organizations included under the target sector include the Kansas Farm Bureau, Kansas Wheat, ADM Livestock Solutions, Nelson Poultry Farms Inc., Midwest Veterinary Services, MediVet Biologics, the Kansas Department of Agriculture, and the numerous individual farmers, ranchers, and feedlot operators throughout the Greater Manhattan region.

Market Segments: The Manhattan region is particularly competitive for two types of activities within the agriculture and animal health sector: **livestock production** and **animal health services**. Livestock production encompasses the entire livestock production cycle from breeding to harvest. Animal health on the other hand includes activities that ensure the health and wellbeing of livestock. Veterinary services, laboratory testing services, and private sector research and development endeavors are also central components of the animal health market segment. Animal food manufacturing was not included as a subsector due to low regional job levels. As of 2017, only 15 local workers were employed in these firms.

Site Considerations: Site considerations for the Agriculture and Animal Health sector vary dramatically by market segment. Animal health companies desire commercial space capable of housing sophisticated laboratory operations and/or Class A office space. Due to the knowledge-based nature of their work, animal health companies will likely prefer locations proximate to Kansas State University and the research institutions housed on or adjacent to the K-State campus. Laboratory requirements will vary by company depending on research needs and the nature of the biological contagions they handle. In contrast, agricultural and livestock production companies require extremely large tracks of undeveloped land, a plentiful water supply, and an interconnected transportation network to transport equipment and livestock to and from market.

National Trends: Global population growth will strain the nation's food production system. The United Nations projects that global population will expanded from 7.3 billion in 2015 to 9.7 billion in 2050. As the global population continues to grow, the raw number of mouths to feed will require productivity enhancements; the Food and Agricultural Organization of the United Nations estimates that food production will need to increase by 70 percent to meet 2050 demand. As a result, companies and countries are continually identifying methods to secure food resources as well as improve production efficiency. Such technologies range from the radical, such as vertical urban farms that grow food in a setting more similar to a laboratory than an open field, to the more practical such as technology-enabled agricultural machinery that utilizes GPS and big data to further enhance production yield. The line between agricultural and

information technology company will continue to blur as market disruptors bring robotics, machine learning, and augmented reality to the farm and pasture.

REGIONAL EMPLOYMENT TRENDS

In 2016, almost 2,500 workers were employed in the Agriculture and Animal Health sector representing approximately 3.3 percent of total regional employment. It is important to note, however, that this total employment figure does not include jobs housed within the region's public sector research institutions.

AGRICULTURE AND ANIMAL HEALTH EMPLOYMENT, 2006 TO 2016

NAICS	Description	Jobs	LQ	Est.	Employment Change, 2006-2016			Wages, Salaries, and Proprietor Earnings (2016)	
					#	%	US %	\$	% of US
Core									
1110	Crop Production	524	1.3	12	23	4.6%	-0.8%	\$25,960	86.0%
1120	Animal Production and Aquaculture	303	1.5	16	61	25.4%	-10.0%	\$29,412	88.5%
1151	Support Activities for Crop Production	112	0.5	3	38	51.2%	22.1%	\$27,553	96.5%
1152	Support Activities for Animal Production	148	7.7	5	112	308.6%	-4.5%	\$30,313	91.7%
9029	State Gov., Excl. Education/Hospitals	491	0.5	37	-178	-26.6%	-4.7%	\$41,244	74.4%
54138	Testing Laboratories	35	0.4	6	12	51.1%	13.7%	\$36,513	49.6%
54194	Veterinary Services	182	1.0	18	38	26.5%	24.9%	\$29,667	76.2%
Support									
4245	Farm Product Raw Material Whsl.	190	5.3	7	54	40.0%	0.4%	\$35,425	68.7%
4249	Misc. Nondurable Goods Merchant Whsl.	96	0.6	4	-69	-41.9%	-12.0%	\$42,533	82.2%
4931	Warehousing and Storage	288	0.7	4	261	982.1%	41.8%	\$19,458	45.1%
54171	R&D in Physical/Eng./Life Sciences	96	0.3	16	74	346.9%	14.0%	\$64,855	50.6%
Total, Target		2,464	0.8	128	426	20.9%	9.9%	\$38,442	56.6%
Total, All Industries		74,427	-	3,055	8,553	13.0%	4.6%	\$42,284	82.5%

Source: Economic Modeling Specialists International (EMSI)

- ✓ **Agriculture and Animal Health experienced strong recent growth in Greater Manhattan.** From 2006 to 2016, regional employment in the target sector (20.9 percent) outpaced the growth rate for the target sector nationally (9.9 percent) by a wide margin. If these growth trends continue, Agriculture and Animal Health activity could enjoy greater agglomeration benefits as agricultural suppliers and animal health services companies enter the region to tap new customer bases.
- ✓ **Despite assets at K-State and the region's historical base in farming, Employment in the Agricultural and Animal Health target (LQ = 0.8) is 20 percent below the average concentration nationwide.** In contrast, Agriculture and Animal Health employment (LQ = 2.12) was

far more concentrated in the Ames, IA region. Part of this discrepancy is likely due to the exclusion of public sector employment within the target sector, K-State employed 234 faculty members in the College of Agriculture and 120 faculty members in the College of Veterinary Medicine in the fall of 2016.

- ✓ **Several key Manhattan Area Agriculture and Animal Health subsectors show strong employment concentrations**, denoted by a location quotient greater than 1.0. Crop production (30 percent more concentrated than the national average), animal production (50 percent), support activities for animal production (7.7 times), and farm product raw material wholesaling (5.3 times) are especially notable in the region. Proximity to advanced agricultural research services and/or plentiful, productive farmland are factors that could yield a competitive advantage relative to other locations.
- ✓ **State government employment within the target sector is primarily focused on regulation of agricultural operations and promotion of agricultural products** throughout the state of Kansas. The Bureau of Labor Statistics reports that approximately 195 workers were employed in public sector agricultural market and commodity regulation activities in 2015.
- ✓ **Average annual wages throughout the entire target sector were well below the national average.** In 2016, the average Agriculture and Animal Health worker earned just 57.4 percent of their national counterpart. Lower wage rates are likely influenced by the underdeveloped private sector research and development activity in the region relative to the national sector as a whole. Lower relative wage rates could negatively impact talent recruitment and attraction efforts if wage growth does not reach greater parity.
- ✓ **Agriculture and Animal Health firms exported \$290,185,651 in goods and services in 2016.** This was second to only Small to Medium Enterprises among the proposed Greater Manhattan target sectors. Because this figure excludes state government agricultural service exports, the export number is likely higher than the reported amount.

OCCUPATIONAL TRENDS

Greater Manhattan features 3,242 workers employed in occupations supportive of the Agriculture and Animal Health sector. This occupational set grew 21.6 percent from 2006 to 2016 compared to 5.6 percent at the national level. These trends demonstrate that Greater Manhattan has a strong and growing workforce for Agriculture and Animal Health employers that can likely serve as an attractor for outside firms if continued expansion can offset projected future shortages.

AGRICULTURE AND ANIMAL HEALTH OCCUPATIONS, 2006 TO 2016

SOC	Description	Jobs	LQ	Employment Change, 2006-2016			Projected Workforce Surplus/Shortage	
				#	%	US %	#	US
11-9010	Farmers/Ranchers/Other Ag. Mgmt.	511	2.2	-44	-8.0%	-22.2%	-240	-175,338
25-9020	Farm and Home Management Advisors	34	6.9	2	6.4%	16.9%	-4	-4,174
45-1010	Sprv. of Farming/Fishing/Forestry Workers	21	0.9	9	77.7%	0.6%	-5	-14,111
45-2000	Agricultural Workers	484	1.0	182	60.0%	13.4%	-129	-90,599
45-2010	Agricultural Inspectors	50	6.1	9	21.6%	6.9%	-22	-5,361
45-2040	Graders and Sorters, Agricultural Products	23	0.9	2	10.0%	5.3%	-3	-9,298
45-2090	Miscellaneous Agricultural Workers	409	0.9	169	70.7%	14.0%	-108	-75,858
49-3041	Farm Eqpt. Mech./Service Technicians	42	2.3	14	47.9%	5.5%	4	-8,469
53-7060	Laborers and Material Movers, Hand	900	0.5	103	12.9%	3.3%	-83	-164,250
29-1130	Veterinarians	58	1.6	18	46.0%	16.2%	-2	-3,878
29-2056	Veterinary Technologists and Technicians	27	0.6	6	26.1%	34.4%	-5	10,430
31-9096	Vet. Assistants/Lab. Animal Caretakers	78	1.9	7	10.1%	23.3%	19	10,254
39-2020	Nonfarm Animal Caretakers	105	0.9	46	77.3%	27.4%	3	-11,635
19-1010	Agricultural and Food Scientists	45	2.6	3	7.7%	8.5%	12	-2,513
19-1020	Biological Scientists	47	0.9	5	11.4%	10.7%	24	12,473
19-4000	Life/Physical/Social Science Technicians	217	1.2	26	13.7%	9.9%	10	-10,426
19-4010	Agricultural and Food Science Technicians	50	4.3	9	22.5%	10.6%	8	-3,826
19-4020	Biological Technicians	26	0.7	0	2.0%	12.5%	-3	7,924
19-4090	Misc. Life/Physical/Social Science Techs.	116	1.5	9	8.9%	12.6%	9	-2,693
Total, All Target Occupations		3,242	0.9	575	21.6%	5.6%	-512	-541,347
Total, Occupations*		74,427	-	8,553	13.0%	4.6%	-5,651	-19,444,484

* Excludes Military Personnel

Source: Economic Modeling Specialists International (EMSI)

- ✓ **Workforce shortages for Agriculture and Animal Health companies are projected in Greater Manhattan due to Baby Boomer retirements combined with future demand caused by growth.** Agriculture and Animal Health occupations are projected to increase by 14.2 percent (460 jobs) over the next decade but not fast enough to counteract 1,179 projected Baby Boom retirements. This would lead to a shortage of 512 workers in this field from 2016 to 2026.
- ✓ **Talent production in the Manhattan region could offset future workforce shortages among occupations that require at least a bachelor's degree education.** Kansas State University offers a wide array of agricultural degrees through the College of Agriculture and College of Veterinary Medicine. Majors range from undergraduate programs in agribusiness to advanced degrees in food science and agricultural engineering. Retaining this graduate pool of Agriculture and Animal Health talent will be crucial if the region is to support private sector animal health research and development. Given national workforce shortages projected within the sector, plentiful workforce availability could be an attractive lure for Agriculture and Animal Health companies and non-profit research operations.

- ✓ **In contrast to its bachelor's, graduate, and doctoral degree capacity, Agricultural and Animal Health local programming at the associate's degree level is less robust.** Manhattan Area Technical College (MATC) offers two degree programs, an advanced biotechnology certificate and a biotechnology laboratory technician associate's, that could lead to employment within the Agriculture and Animal Health sector. However, due to low wage rates for some agriculture occupations, expanding technical education capacity for the sector should proceed with caution. Given the increasing utilization of technology at the farm and pasture, existing associate's degrees such as MATC's information networking technology program could support Agriculture and Animal Health specializations. MATC is working aggressively in partnership with other education and training institutions and the private sector to ramp up its programs and curricula in anticipation of NBAF's upcoming launch.

STRATEGIC IMPLICATIONS

- ✓ **Proximity to sizable livestock operations provides a compelling asset for animal health and agricultural technology companies.** Just as bio-pharma companies seek out locations with large, diverse patient populations for clinical trials, global animal health companies may find the Manhattan region an attractive destination particularly if ranchers or feedlot operators actively participate in clinical trials for new animal health technologies, vaccines, or pharmaceutical products.
- ✓ **Although average annual wages within the crop and animal production subsectors pay below the Manhattan Area average for all sectors, this employment could advance other advantageous community goals.** The Soldier Agricultural Vocational Education (SAVE) farm is an innovative program that assists transitioning soldiers back into civilian life. The program could also have the added benefit of more deeply rooting veterans to the Manhattan Area community, potentially leading to their residence in the region long-term. Enhanced vocational training could also meet the growing needs of animal health research and development organizations operating throughout Greater Manhattan.
- ✓ **Promotion of the Animal Health Corridor by the Kansas City Area Development Council (KCADC) is both a blessing and a curse.** On the one hand, it promotes the Manhattan Area's research prowess and expertise in the field. On the other, its marketing activities highlight Kansas City as the corridor's epicenter of animal health. Manhattan Economic Development already participates in multiple KCADC-sponsored events every year. Continuing to leverage these relationships, especially as NBAF makes Greater Manhattan a global hub for biosecurity, will certainly be to the region's benefit.
- ✓ **Better leveraging private investment could enhance the Manhattan Area's economic growth within Agriculture and Animal Health.** According to the National Science Foundation, Kansas State University obtained \$78.4 million for agricultural sciences research and \$43.5 million for biological sciences research in 2015 from federal and nonfederal sources. Of the combined \$121.9 million, only \$9.6 million came from private businesses or non-profit organizations.

- ✓ **Development pressure could limit the potential of agricultural production activities if the region does not grow in a “smart” manner.** Focus group participants representing Pottawatomie and Riley counties expressed concern that agricultural land is at risk of transitioning to residential and commercial uses should the region not proactively plan for new growth and development.
- ✓ **Kansas State University’s K-Site program is a boon to the animal health market segment.** The proposed research park and existing K-State Business Park will serve an important function by providing agricultural sciences and animal health prospect companies with a “soft-landing” pad in Greater Manhattan for their business operations. The K-State Business Park is a particularly important asset given that the second phase will offer companies with flexible space, allowing them to easily scale their operations. Moreover, the second phase enhances Greater Manhattan’s office market by adding 60,000 square feet of Class-A office space.

SMALL TO MEDIUM ENTERPRISE MANUFACTURING

Definition and Overview: Greater Manhattan’s manufacturing sector has experienced numerous positive developments in recent years. In 2016, GTM Sportswear was sold to HanesBrands Inc., who cited the strength of GTM Sportswear’s workforce and its growth potential as key factors driving the purchase. Other global brands have also expanded into the Greater Manhattan market, including Caterpillar, who announced a 40,000 square foot facility in 2011. The Small to Medium Enterprise (SME) manufacturing target reflects these rising opportunities. **Small to Medium Enterprise manufacturers are highly automated, capital intensive operations which rely on a well-educated talent pool to operate computer controlled equipment and optimize production efficiency.** The SME manufacturing target covers a wide swath of production activity ranging from athletic textiles to automotive trailer manufacturing. Wholesale activity, which supplies parts and inputs into the production process, is also incorporated into the Small to Medium Enterprise manufacturing target. This reflects the more coordinated nature of modern supply chains and logistical operations, often requiring “just-in-time” part and product shipments.

Company Composition: Greater Manhattan small to medium size manufacturers include Florence Corporation, GTM Sportswear, Caterpillar Inc., R-Tech Tool & Machine, and Travalum Trailers, among others.

Market Segments: Advanced materials, metal and metallic products, and transportation and construction equipment are core areas of manufacturing strength in Greater Manhattan. Although three market segments are identified as particular areas of strength in Greater Manhattan, it does not preclude local economic development organizations from providing relocation, expansion, or retention services to companies operating outside of these segments.

Site Considerations: Typical manufacturing location considerations include reliable, low cost power, a healthy labor pool, well connected transportation infrastructure, large contiguous tracks of land, and an abundant supply of water (for certain operations). Other factors that may also weigh on location decisions include state and local tax climates, proximity to consumer markets, access to water or inland ports, or closeness to other suppliers within the manufacturers’ distribution chain.

National Trends: Automation and globalization have forever altered the nation’s manufacturing sector. As reported by Bloomberg News, manufacturing’s share of total U.S. employment reached an all-time low of 8.48 percent in May 2017, down from 40 percent in the 1940s. Despite these trends, there is cause for optimism. Rising global labor costs, concerns over the security of intellectual property, supply chain disruptions, government corruption, and other factors are reinvigorating the sector nationally. New technologies are also driving further productivity gains. Interconnected sensors capable of instantly adjusting production processes, augmented reality technologies which enhance front-line workers’ capabilities, and rapid prototyping that reduces product-development cost and duration will transform the factory floor and the nature of manufacturing work. Technology literacy, computer coding, team collaboration, and technical communication are rising skill-sets sought by successful manufacturers.

REGIONAL EMPLOYMENT TRENDS

In many respects, manufacturing activity in Greater Manhattan has defied national trends, particularly in the textile sector. Textile manufacturing was among the first manufacturing subsectors to globalize as China focused its initial industrialization efforts on textile production. As a result, numerous textile mill towns throughout the United States entered a period of sharp, lasting economic decline. Some textile manufacturing communities, such as the carpet manufacturing capital Dalton, Georgia, have withstood foreign competition. Greater Manhattan's textile sector was similarly insulated from globalization pressures; employment within the other textile product mills sector nearly doubled over the last decade. This growth is emblematic of Greater Manhattan's vibrant manufacturing sector as a whole.

SMALL TO MEDIUM ENTERPRISE MANUFACTURING EMPLOYMENT, 2006-2016

NAICS	Description	Jobs	LQ	Est.	Employment Change, 2006-2016			Wages, Salaries, and Proprietor Earnings (2016)	
					#	%	US %	\$	% of US
Core									
3149	Other Textile Product Mills	577	17.8	1	322	126.6%	-18.3%	\$32,145	85.5%
3259	Other Chemical Product/Preparation Mfg.	59	1.5	2	38	183.3%	-22.6%	\$44,555	64.6%
3261	Plastics Product Mfg.	304	1.1	2	25	8.8%	-11.1%	\$65,757	129.2%
3262	Rubber Product Mfg.	227	3.6	1	87	61.9%	-16.1%	\$53,534	95.8%
3323	Architectural and Structural Metals Mfg.	177	1.0	2	8	4.4%	-10.6%	\$41,966	80.2%
3324	Boiler, Tank, and Shipping Container Mfg.	324	7.4	2	-49	-13.2%	-1.5%	\$38,454	60.9%
3327	Machine Shops/Turned Product Mfg.	102	0.6	5	41	66.7%	-0.4%	\$57,640	109.3%
3329	Other Fabricated Metal Product Mfg.	88	0.7	4	-	-	-4.8%	\$42,086	69.3%
3331	Ag./Construction/Mining Machinery Mfg.	435	4.4	2	-14	-3.1%	-2.9%	\$61,778	85.2%
3335	Metalworking Machinery Mfg.	67	0.8	2	30	82.8%	-9.8%	\$97,808	165.5%
3362	Motor Vehicle Body and Trailer Mfg.	63	0.9	2	22	53.4%	-14.0%	\$35,148	69.8%
3363	Motor Vehicle Parts Mfg.	118	0.4	1	38	47.3%	-11.0%	\$31,745	54.2%
Support									
4231	Motor Vh./Motor Vh. Parts/Supplies Whsl.	38	0.2	7	-12	-24.2%	-5.2%	\$35,915	64.4%
4233	Lumber/Other Construction Materials Whsl.	72	0.7	4	38	115.2%	-18.9%	\$54,852	91.4%
4235	Metal and Mineral (except Petroleum) Whsl.	156	2.6	3	91	140.7%	-3.4%	\$63,271	96.5%
4238	Machinery, Equipment, and Supplies Whsl.	172	0.5	9	103	150.3%	-2.3%	\$59,329	87.5%
4239	Miscellaneous Durable Goods Whsl.	36	0.2	6	12	49.9%	-3.6%	\$43,014	80.9%
4249	Miscellaneous Nondurable Goods Whsl.	96	0.6	4	-69	-41.9%	-12.0%	\$42,533	82.2%
4931	Warehousing and Storage	288	0.7	4	261	982.1%	41.8%	\$19,458	45.1%
Total, All Sectors		3,400	1.2	63	1,060	45.3%	-3.3%	\$46,718	84.2%
Total, All Industries		74,427	-	3,055	8,553	13.0%	4.6%	\$42,284	82.5%

Source: Economic Modeling Specialists International (EMSI)

- ✓ **Greater Manhattan’s Small to Medium Enterprise Manufacturing has defied national employment trends.** From 2006 to 2016, SME manufacturers added 1,060 employees, a growth rate of 45.3 percent. Nationally, employment among SME manufacturers declined by -3.3 percent. Shift-share analysis (an analytic tool that determines the cause of growth – whether due to industry, national, or local factors) reveals that employment gains among the regional SME manufacturing sector is almost exclusively caused by local competitive factors.
- ✓ Not every SME manufacturing sector has enjoyed growth, however. Employment among boiler, tank, and shipping container manufacturers (-13.2 percent) has declined substantially over the last decade. This subsector may benefit from business retention and expansion efforts which identify and remove barriers to growth.¹
- ✓ **Several SME manufacturing subsectors in Greater Manhattan are highly concentrated.** For example, employment in other textile product mills is almost 18 times more concentrated than the average community nationwide. Rubber product manufacturing (3.6 times more concentrated than the national average); boiler, tank, and shipping container manufacturing (7.4 times); and agriculture, construction, and mining machinery manufacturing (4.4 times) are also highly localized. Strong employment concentrations in specific subsectors could serve as a lure to attract other manufacturers who utilize these skill-sets or outside suppliers who may benefit from proximity to their customer bases.
- ✓ **Although still comparatively small, the average size of manufacturing operations (in terms of employment) has grown in Greater Manhattan.** In 2006, the average SME manufacturer employed 43 workers at a single establishment. By 2016, the average SME manufacturer employed 54 workers. If establishment sizes continue to grow, manufacturers could require additional industrial space to expand their operations (provided the size of their operations is a function of their space requirements).
- ✓ **The real impact and benefit to Greater Manhattan of the Small to Medium Enterprise Manufacturing target can be seen in its export data.** In 2016, Greater Manhattan manufacturers sold approximately \$700 million in intermediate or finished goods to other areas across the nation and globe. This total doubled the next most robust export sector among the Manhattan Area’s targets, Agriculture and Animal Health. The tremendous export potential of the manufacturing sector is why regions and states so heavily incentivize the relocation of these firms and why Greater Manhattan should not take for granted these jobs. Multiplier effects from SME Enterprise Manufacturing employment can lead to significant secondary economic impact in the region.

¹ Note that given the sizable investment by Caterpillar in 2011, employment decline reported in the agriculture, construction, and mining machinery sector is likely due to employment re-classification.

OCCUPATIONAL TRENDS

Over 5,200 Greater Manhattan workers are employed in occupations supportive of SME Enterprise Manufacturing, representing 7 percent of the regional total. From 2006 to 2016, SME Enterprise Manufacturing occupations grew by 16.4 percent compared to a 2.2 percent decline nationally. Because many of these jobs are located outside of the Manhattan core, there is the potential to overlook their impact and importance to the broader region. Viewing the Manhattan region as an integrated labor shed will help leaders engage partners from across the three-county area and better coordinate growth strategies.

SMALL TO MEDIUM ENTERPRISE MANUFACTURING OCCUPATIONS, 2006-2016

SOC	Description	Jobs	LQ	Employment Change, 2006-2016			Projected Workforce Surplus/Shortage	
				#	%	US %	#	US
51-1010	First-Line Sprv.s of Prod./Op. Workers	200	0.7	24	13.9%	-10.3%	-28	-129,878
51-2090	Miscellaneous Assemblers and Fabricators	299	0.5	33	12.4%	-8.5%	6	-101,921
51-4010	Comp. Control Programmers/Operators	65	0.8	19	42.0%	4.1%	1	-35,759
51-4030	Mech. Tool Cutting Oprtors., Metal/Plastic	95	0.6	7	7.7%	-19.1%	12	-7,235
51-4040	Machinists	226	1.2	64	39.4%	0.6%	-42	-144,124
51-4120	Welding, Soldering, and Brazing Workers	214	1.0	13	6.4%	-8.1%	17	131
51-5110	Printing Workers	72	0.6	-14	-16.6%	-25.6%	3	-22,117
51-6030	Sewing Machine Operators	110	1.5	29	36.2%	-28.0%	27	-26,136
51-7010	Cabinetmakers and Bench Carpenters	54	1.1	31	132.4%	-30.0%	-11	-16,106
51-9060	Inspect/Testers/Sorters/Samplers/Weighers	82	0.3	4	4.7%	-4.6%	-24	-108,980
51-9120	Painting Workers	65	0.8	19	41.0%	-8.3%	10	4,112
51-9190	Miscellaneous Production Workers	227	0.5	16	7.5%	-9.2%	14	-28,812
17-2140	Mechanical Engineers	121	0.9	14	13.6%	2.3%	-1	-34,998
41-4010	Sales Reps, Wholesale and Manufacturing	487	0.6	107	28.2%	-1.7%	-117	-406,847
43-5070	Shipping, Receiving, and Traffic Clerks	231	0.7	35	18.1%	-2.8%	-8	-26,585
49-9040	Indstrl. Mach. Install./Repair/Main. Workers	136	0.6	16	13.8%	5.1%	-56	-187,884
49-9070	General Maintenance/Repair Workers	768	1.1	93	13.8%	4.7%	-204	-509,304
53-3030	Driver/Sales Workers and Truck Drivers	784	0.5	89	12.9%	1.7%	-235	-857,137
53-7050	Industrial Truck and Tractor Operators	104	0.4	35	51.3%	3.7%	-5	-688
53-7060	Laborers and Material Movers, Hand	900	0.5	103	12.9%	3.3%	-83	-164,250
Total, Selected Occupations		5,238	0.6	738	16.4%	-2.2%	-724	-2,804,518
Total, Occupations*		74,427	-	8,553	13.0%	4.6%	-5,651	-19,444,484

* Excludes Military Personnel

Source: Economic Modeling Specialists International (EMSI)

- ✓ **A tight labor market could curtail future SME manufacturing attraction and expansion efforts in the Manhattan Area.** Combined with Baby Boomer retirements, the SME Enterprise Manufacturing sector is projected to experience workforce shortages across a broad range of

occupations, including machinists (-42 shortage), general maintenance and repair workers (-204), and wholesale and manufacturing sales representatives (-117 jobs). However, other manufacturing occupations are well supplied regionally, including welding, soldering, and brazing workers (+17 excess capacity), team assemblers (+6), and sewing machine operators (+27).

- ✓ **With an unemployment rate below the national average, Greater Manhattan's labor market offers little slack to accommodate new or expanding manufacturing operations.** According to EMSI, the Manhattan Area's manufacturing employment is expected to increase by 13.4 percent (457 jobs) over the next decade (2006-2016). Filling SME manufacturing workforce demand will rest squarely upon the shoulders of Manhattan Area Technical College. According to the National Center for Education Statistics, Manhattan Area Technical College furnished 17 welding and 35 other SME manufacturing-related degrees in 2016. This capacity will prove vital as SME manufacturing grows regionally but must increase to accommodate future demand.
- ✓ SME Enterprise Manufacturing occupations typically require at least a high school education. However, as SME manufacturers adopt new technologies to improve their production processes, a high school diploma may become insufficient to meet the future needs of SME manufacturers.
- ✓ Occupational concentrations among machinists (20 percent more concentrated), sewing machine operators (50 percent), and general maintenance and repair workers (10 percent) could be attractive to certain SME manufacturers who utilize these skill sets in production processes.

STRATEGIC IMPLICATIONS

- ✓ **SME manufacturing is the quintessential export sector and, as a result, is a critical component of Greater Manhattan's traded economic base.** After adding value to inputs, manufacturers typically sell their intermediate or final products to national or global markets. Opportunities to attract assemblers and suppliers to the region to co-locate with Manhattan Area customers can be identified and pursued through existing business and marketing programs.
- ✓ **Limited availability of industrial development sites is a key concern for Greater Manhattan.** Only 30.2 percent of business owners or executives identified availability of industrial sites and buildings as an advantage or significant advantage when responding to the Greater Manhattan Project Community Survey. As manufacturing operations continue to expand in the region, Greater Manhattan's industrial product could become stressed as these operations consume larger development footprints. Moreover, limited contiguous industrial acreage in the region places Greater Manhattan at a competitive disadvantage for more sizable SME manufacturing operations.
- ✓ **A tight labor market could also curtail future SME manufacturing attraction and expansion efforts in the Manhattan Area.** Combined with Baby Boomer retirements, the SME manufacturing sector is projected to experience a workforce shortages across a broad range of occupations including machinists (-42 shortage), general maintenance and repair workers (-204), and wholesale and manufacturing sales representatives (-117 jobs). Other manufacturing occupations are well

supplied regionally including welding, soldering, and brazing workers (+17 excess capacity), team assemblers (+6), and sewing machine operators (+27).

- ✓ **Kansas' tax code could positively influence SME manufacturing operations considering Greater Manhattan an attractive relocation or expansion destination.** According to Location Matters, a joint research effort by the Tax Foundation and KPMG, the state of Kansas's effective tax rate favors capital intensive manufacturing operations (11.3 percent, ranked 30th out of 50 states) over labor intensive manufacturing operations (12.6 percent, 40th out of 50 states). Because Greater Manhattan's most viable production focus is small to medium sized firms, this dynamic is beneficial. Tax considerations factor in latter stages of the site location process, often after a handful of communities have been short-listed.
- ✓ **Geographic variation and infrastructure realities will strongly influence Greater Manhattan's growth strategies for SME manufacturing.** The region's most competitive Interstate- and rail-served sites are located in Pottawatomie and Geary counties, not the population and job center of Riley County. Thus, regional marketing and target development activities must be effectively coordinated among all organizations and governments to ensure that results meet expectations. Greater Manhattan also suffers from a lack of a multi-modal trans-load facility in the region.

PROFESSIONAL AND TECHNICAL SERVICES

Definition and Overview: Professional and Technical Services encompasses a wide array of white collar employment including legal services, accounting and tax preparation, architecture and engineering, computer systems design, and advertising and public relations among other business services. Greater Manhattan affords Professional and Technical Services companies with one key competitive advantage: a steady stream of talent. In a world in which talent is increasingly mobile, K-State is a significant asset to prospective and current Professional and Technical Services firms seeking a qualified, diverse workforce. Moreover, the K-State Business Park further reduces barriers to entry by providing scalable Class A office space to suit company needs. Targeting Professional and Technical Services reinforces the Knowledge Based Economic Development (KBED) partnership's efforts to increase the number of high-paying jobs regionally tied to strengths of Kansas State University. These professional positions also provide quality entry-level employment for graduates of business and liberal arts programs. Markets with this capacity have greater success retaining and attracting younger talent. **Strategies to grow this target mostly focus on small business development and entrepreneurship.** The presence of major anchors such as K-State, Fort Riley, and NBAF afford many opportunities to source Professional and Technical Services locally.

Company Composition: Professional and Technical Services companies operating in Greater Manhattan region include Garmin, U.S. Engineering, CivicPlus, Redi Systems, New Boston Creative Group, BBN Architects, and Keating & Associates among many others.

Market Segments: Three market segments emerged as areas of particular strength for Greater Manhattan. **Engineering** services cover a diverse range of engineering consulting activity, including architecture services. **Computer systems design** firms provide planning and design services which integrate computer hardware, software, and communication technologies. Finally, **professional and scientific consulting** encompasses private sector research and development, accounting, advertising, and public relations activity in the region.

Site Considerations: Office space quality and cost is a primary location consideration for Professional and Technical Services companies. These firms also require access to quality fiber optic infrastructure, steady and reliable power supply, and redundant capacity in both areas. As firms attempt to attract millennials and next-generation workers, site considerations may also include amenities such as a 24/7 gym, shower and changing facilities, and event spaces to host community gatherings. Tax structure, executive housing, school quality, and labor costs are also factors that may influence prospects' site location decisions.

National Trends: Professional and Technical Services businesses are increasingly becoming socially conscious. Technology companies like Google and Facebook have crafted hiring practices to diversify their workforces while other companies have adopted "green" practices to support environmental sustainability. What these practices all have in common is that they enhance the company's attractiveness to tomorrow's talent pool. In a recent survey of corporate executives, PricewaterhouseCoopers found that 78 percent of US CEOs felt that a skilled, educated, and adaptable workforce should be a priority for businesses. Workforce

diversity and sustainability is also changing the nature of the office environment. Open floor plans, “hoteling,” and telecommuting are shrinking physical footprints of many corporate offices and, consequently, increasing the importance of fiber connectivity and information technology infrastructure. Nationally, Professional and Technical Services sector is expected to grow by 15.1 percent over the next decade, according to Economic Modeling Specialists Intl.

REGIONAL EMPLOYMENT TRENDS

Greater Manhattan’s Professional and Technical Services sector is currently underdeveloped relative to the average community nationwide. Institutional support could be the linchpin to mature the Professional and Technical Services sector regionally. Many communities across the United States have supported “buy local” initiatives that strengthen relationships between institutional buyers and local firms operating in their community. Leveraging institutional Professional and Technical Services spending could help spur greater economic dynamism regionally and lead to a more advanced target sector in the future.

PROFESSIONAL AND TECHNICAL SERVICES, 2006-2016

NAICS	Description	Jobs	LQ	Est.	Employment Change, 2006-2016			Wages, Salaries, and Proprietor Earnings (2016)	
					#	%	US %	\$	% of US
Core									
5411	Legal Services	181	0.3	40	-16	-8.0%	-5.8%	\$42,929	48.5%
5412	Account./Tax Prep./Bkkeeping/Payroll Svcs.	254	0.5	36	63	33.0%	9.0%	\$45,613	69.2%
5413	Arch./Engineering, and Related Services	474	0.7	62	145	44.2%	0.7%	\$55,825	66.4%
5414	Specialized Design Services	38	0.3	7	7	21.6%	1.0%	\$30,856	69.3%
5415	Comp. Sys. Design and Related Services	361	0.4	70	224	162.5%	48.5%	\$61,525	58.9%
5416	Mgmt./Sci./Tech. Consulting Services	305	0.4	73	-66	-17.9%	43.1%	\$49,272	60.1%
5417	Sci. Research and Development Services	97	0.3	16	73	295.0%	11.9%	\$65,011	52.8%
5418	Ad./Public Relations, and Related Services	43	0.2	16	16	57.5%	2.0%	\$47,865	63.6%
5419	Other Prof/Sci./Technical Services	569	1.5	35	345	154.0%	27.7%	\$44,292	95.5%
Support									
5611	Office Administrative Services	287	1.2	31	-388	-57.5%	33.8%	\$43,739	52.3%
5612	Facilities Support Services	197	2.9	5	-204	-50.9%	14.3%	\$17,703	35.7%
5614	Business Support Services	269	0.6	13	-417	-60.8%	13.1%	\$24,060	61.5%
Total, All Sectors		3,074	0.6	404	-219	-6.6%	17.4%	\$52,729	57.3%
Total, All Industries		74,427	-	3,055	8,553	13.0%	4.6%	\$42,284	82.5%

Source: Economic Modeling Specialists Intl. (EMSI)

- ✓ As seen in the above table, while “core” Professional and Technical Services have seen significant job creation (790 jobs) over the most recent decade (2006-2016), “support” subsectors have moderated these gains. **From 2006 to 2016, “support” employers shed nearly 1,009 jobs, leading to an overall decline of 219 jobs for the entire Professional and Technical Services**

sector. This ten-year decline is particularly concerning given that the Professional and Technical Services target as defined for this report grew by 17.4 percent nationally.

- ✓ **Greater Manhattan’s “support” subsectors have been negatively impacted by weakness in the region’s call center and institutional support markets.** From 2006 to 2016, numerous call center operations have made Worker Adjustment and Retraining Notification Act (WARN) filings in the Manhattan region, including Verizon (169 employees effected), Alorica (182), Sykes Enterprises, Inc. (256), Sodexo, Inc. (116 employees), and Aramark Education (91).
- ✓ **Employment projections provided by EMSI find that the Manhattan Area’s Professional and Technical Services sector could return to growth over the next decade (2016-2026).** Target sector employment is expected to increase by 580 jobs over the coming ten-year period, a gain of 18.9 percent. Nationally, employment in the sector is expected to increase by 15.1 percent.
- ✓ **Because Professional and Technical Services are typically local-serving, their export capacity is often limited.** This is the case with Greater Manhattan’s sector, which exported \$99,215,218 in goods and services in 2016. As noted previously, a key benefit of targeting Professional and Technical Services is its positive impact on regional workforce retention and attraction.
- ✓ As with most other Manhattan Area sectors, **low wage rates provided by Professional and Technical Services employment could negatively impact the region’s capacity to attract future talent.** On average, Greater Manhattan’s Professional and Technical Services sector employees earned 42.7 percent below their national counterparts. However, it is important to note that occupational mix can distort this differential. For instance, communities with fewer C-suite executives and middle managers typically display lower average annual wage relative to the national sector which includes the nation’s highest paid positions.

OCCUPATIONAL TRENDS

Professional and Technical Services workers are among the nation’s most highly mobile talent. These in-demand professionals have great flexibility in deciding where they want to live and the environment in which they work. Nationally, approximately 5.3 million professional and technical service workers will retire over the next ten years. The significant outflow of Baby Boomers at the national level will undoubtedly cause companies to seek proactive solutions to address pending talent shortages. As a result, the Manhattan Area’s quality of life and K-State’s graduate output could be seen as attractive assets for companies in this space.

Currently, **occupations supportive of Professional and Technical Services in Greater Manhattan comprise 14 percent of the workforce**, or 10,269 positions. As with the sector’s employment, occupational growth trends have notably trailed the U.S. in the previous ten-year period.

PROFESSIONAL AND TECHNICAL SERVICES OCCUPATIONS, 2006-2016

SOC	Description	Jobs	LQ	Employment Change, 2006-2016			Projected Workforce Surplus/Shortage	
				#	%	US %	#	US
11-1010	Chief Executives	142	1.0	11	8.4%	1.3%	-83	-162,935
11-1020	General and Operations Managers	653	0.6	9	1.4%	4.6%	-111	-438,327
11-2020	Marketing and Sales Managers	137	0.5	5	3.6%	5.7%	-4	-14,724
11-3010	Administrative Services Managers	93	0.7	5	6.0%	8.5%	-33	-135,784
11-3020	Computer/Information Systems Managers	78	0.5	11	16.0%	18.3%	-8	-66,486
11-3030	Financial Managers	132	0.5	8	6.7%	3.3%	-24	-82,302
11-3120	Human Resources Managers	52	0.8	6	12.7%	11.5%	-17	-35,561
11-9040	Architectural and Engineering Managers	64	0.7	15	29.9%	0.0%	-29	-71,721
11-9190	Miscellaneous Managers	299	0.8	66	28.3%	22.8%	-123	-310,168
13-1040	Compliance Officers	138	1.1	11	8.6%	7.7%	-25	-63,094
13-1070	Human Resources Workers	230	0.8	9	3.9%	1.1%	11	-2,202
13-1110	Management Analysts	150	0.4	-12	-7.6%	14.4%	-68	-179,572
13-1160	Market Rsrch. Anlyst./Marketing Specialists	145	0.6	26	21.4%	19.9%	-8	21,681
13-1190	Misc. Business Operations Specialists	459	1.0	17	4.0%	9.4%	-57	-117,101
13-2010	Accountants and Auditors	444	0.7	42	10.4%	8.6%	-67	-235,430
13-2050	Financial Analysts and Advisors	102	0.3	14	15.8%	3.9%	-28	-21,606
15-1120	Computer and Information Analysts	101	0.3	12	13.0%	23.4%	-8	-90,144
15-1130	Software Developers and Programmers	248	0.3	48	24.1%	22.3%	28	116,804
15-1140	Database/Sys. Admin./Network Architects	159	0.5	1	0.6%	8.4%	23	38,636
15-1150	Computer Support Specialists	352	0.9	24	7.3%	13.8%	67	7,673
43-1010	First-Line Sprvsr. of Office/Adm. Support	391	0.6	-6	-1.4%	5.1%	-99	-328,457
43-3030	Bookkeeping/Accounting/Auditing Clerks	650	0.8	-51	-7.2%	-5.8%	-127	-433,535
43-3050	Payroll and Timekeeping Clerks	62	0.7	-3	-5.2%	-0.3%	-4	-32,122
43-4050	Customer Service Representatives	550	0.4	-191	-25.7%	6.9%	-59	-51,556
43-4160	HR Assistants, Except Payroll/Timekeeping	70	1.0	-3	-4.3%	2.9%	-1	-7,294
43-4170	Receptionists and Information Clerks	403	0.8	17	4.3%	9.6%	-23	-181,139
43-6010	Secretaries and Administrative Assistants	2,215	1.1	32	1.5%	3.1%	-429	-1,317,881
43-9060	Office Clerks, General	1,417	0.9	-18	-1.3%	2.6%	-123	-659,665
43-9190	Misc. Office/Admin. Support Workers	331	2.0	10	3.3%	9.5%	18	-54,041
	Total, Selected Occupations	10,269	0.7	115	1.1%	6.8%	-1,413	-4,908,054
	Total, Occupations*	74,427	-	8,553	13.0%	4.6%	-5,651	-19,444,484

* Excludes Military Personnel

Source: Economic Modeling Specialists International (EMSI)

- ✓ **Strong growth among certain Professional and Technical Services occupations could lead to increased regional information technology capacity.** Computer and information systems managers (16.0 percent), computer and information analysts (13.0 percent), and software developers and programmers (24.1 percent) grew at a rapid clip over the last ten years in Greater Manhattan.

- ✓ **A number of Professional and Technical Services occupations with broad utility for firms in this sector are under-represented in the Manhattan Area.** Customer service representatives (60 percent below the national average), marketing and sales managers (50 percent below), management analysts (60 percent below), and first-line supervisors of office and administrative support (40 percent below), among others, feature concentrations will below the U.S. rate.
- ✓ **Over the next ten-years, Greater Manhattan is expected to experience a deficit of 479 Professional and Technical Services positions caused by retirements and projected employment demand.** Most Professional and Technical Services occupations require at least a bachelor's degree education. Given the time commitment of training new talent with skill-sets capable of workplace success, projected workforce shortages will require proactive planning in order to meet future employer demand.

STRATEGIC IMPLICATIONS

- ✓ **Airport capacity is a benefit for Professional and Technical Services employment in Greater Manhattan.** Direct connections to Chicago and Dallas provide firms in this sector with access to new markets and the ability to accommodate out-of-region client meetings. As community stakeholders identified during public input, direct flight capacity expansion is an ongoing discussion. However, for a college-centered community of Greater Manhattan's size, having this level of passenger airport capacity is notable.
- ✓ **Thousands of annual K-State graduates, transitioning military from Fort Riley, and so-called "trailing" spouses from both institutions offer prospect employers in Professional and Technical Services a rich pool of potential workers.** The success of the Kansas State Business Park is a strong example of Greater Manhattan leveraging its rising talent pool to support private sector activity. Initial attraction efforts for the target sector will likely resemble the K-Site program, starting with small satellite offices in the hopes that firms will establish more sizable operations at a future date. Soft landing facilities will be a vital asset to this sector moving forward.
- ✓ During focus group input, college students in Greater Manhattan felt that they were relatively disconnected from internship opportunities and young professional networks in the community. Young professionals also noted that they rarely mix with Kansas State University students through the Manhattan Young Professionals program. **Fostering networks among college students and young professionals could better connect K-State graduates to post-collegiate opportunity.**
- ✓ **Reversing Greater Manhattan's domestic outmigration trends will be critical to ensuring a sustainable supply of Professional and Technical Services talent.** In addition to retaining well-educated graduates, talent attraction techniques range from alumni outreach to online marketing collateral which showcase Greater Manhattan's quality of life and employment opportunities.
- ✓ According to a study conducted by KPMG and the Tax Foundation, **the state of Kansas's tax climate may be more competitive for specific types of Professional and Technical Services**

operations than other states. Tax rates for corporate headquarters (25th out of 50 states) displayed the most favorable tax climate relative to research and development headquarters (47th) and call centers (39th).

- ✓ As stated earlier, **leveraging institutional buying power (K-State, Fort Riley, and NBAF), could enhance private sector Professional and Technical Services employment.** “Buy local” initiatives could encompass architectural, engineering, and related services (86.3 percent of regional demand met by imports), scientific research and development services (96.2 percent), computer systems design and related services (85.5 percent), and management, scientific, and technical services (78.8 percent). If successful, the local sourcing initiative could yield increased economic activity as regional Professional and Technical Services firms hire staff to fulfill new contract orders or provide raises to existing staff members.

BIO-DEFENSE AND SECURITY

Definition and Overview: At the heart of Greater Manhattan's Bio-Defense and Security target are the National Bio and Agro-Defense Facility and Kansas State University's Biosecurity Research Institute. As the nation's only Biosafety Level (BSL) 4 facility capable of handling large cattle and other livestock, NBAF will target specific high-consequence threats including foot and mouth disease, African swine fever, classical swine fever, nipah virus, hendra virus, and ebola. As a whole, **the Bio-Defense and Security sector encompasses public and private sector research and development activities aimed at understanding and thwarting acts of biological terrorism and warfare in order to safeguard the global human and animal population from pandemic outbreaks.** Vaccine development, testing, and validation; pathogen-detection technology development and validation; contamination control; outbreak modeling and disease prediction; and zoonotic disease prevention are central components of Greater Manhattan's Bio-Defense and Security target.

Institutional Capacity: As Greater Manhattan's private sector Bio-Defense and Security sector continues to mature, businesses locating within the region will benefit from the wealth of intellectual capital and innovation output at entities including the Center of Excellence for Emerging and Zoonotic Animal Diseases, the Center of Excellence for Vector-Borne Diseases, and the Biosecurity Research Institute.

Site Considerations: Key site location factors in the Bio-Defense and Security target differ depending on the size and nature of the company. Startups, for instance, will require low cost laboratory and office space with flexible lease arrangements that allow them to scale depending on their needs. Founders will also seek out areas with strong venture capital capacity or regions with strong connection to external venture capital networks. More established companies will require specialized research facilities. However, traditional site location factors such as state and local tax climates, local economic development incentives, and quality of life factors may also influence site location decisions. Regardless of firm type, intellectual capital and the ease to access this capital are critical considerations.

National Trends: According to the Trust for America's Health, over half of the United States is unprepared for the next pandemic or bioterrorism event. Out of 50 states measured in the "Ready or Not: Protecting the Public's Health from Diseases, Disasters, and Bioterrorism" report, 26 states scored a six or lower on ten key indicators that determine how prepared a state is to respond to a public health crisis.² Moreover, the Trust for America's Health found a number of critical deficiencies that undermine the nation's capability to respond to a pandemic or bioterrorism attack including reactive, insufficient funding; continued cuts to healthcare emergency preparedness funds; and disjointed planning throughout the emergency response apparatus. In terms of food system security, the interconnectivity of global trade will likely necessitate a global response to animal health and wellness, similar to the response now engaged in the human health sphere. With the

² Trust for America's Health. "Ready or Not? Protecting the Public's Health From Diseases, Disasters, and Bioterrorism." December 2016.

National Bio and Agro-Defense Facility, Greater Manhattan will become an important focal point of this global response.

REGIONAL EMPLOYMENT TRENDS

At present, Greater Manhattan’s Bio-Defense and Security sector is largely composed of public sector employment housed at Kansas State University. However, private sector activity is beginning to emerge and will likely strengthen as the National Bio and Agro-Defense Facility becomes operational.

BIO-DEFENSE AND SECURITY EMPLOYMENT, 2006-2016

NAICS	Description	Jobs	LQ	Est.	Employment Change, 2006-2016			Wages, Salaries, and Proprietor Earnings (2016)	
					#	%	US %	\$	% of US
5417	Scientific R&D Services	97	0.3	16	73	295.0%	11.9%	\$65,011	52.8%
54138	Testing Laboratories	35	0.4	6	12	51.1%	13.7%	\$36,513	49.6%
54169	Other Sci./Tech. Consulting Svcs.	73	0.6	22	47	175.2%	50.1%	\$50,221	64.8%
902612	Colleges/Uni./Prof. Schools (State Gov.)	4,697	3.9	1	124	2.7%	10.5%	\$52,933	119.1%
Total, All Sectors		4,902	2.8	45	255	5.5%	12.90%	\$74,286	91.7%
Total, All Industries		74,427	-	3,055	8,553	13.0%	4.6%	\$42,284	82.5%

Source: Economic Modeling Specialists, Intl.

- ✓ **Greater Manhattan’s Bio-Defense and Security activity is underdeveloped compared to the average community nationwide.** Scientific research and development (70 percent below the national average), testing laboratories (60 percent), and other scientific and technical consulting services (40 percent) all displayed employment concentrations well below the expected employment level for an economy of Greater Manhattan’s size. This is especially notable considering K-State’s research focus and capacity at entities such as the Biosecurity Research Institute.
- ✓ **However, regional Bio-Defense and Security research and development employment is rapidly growing.** From 2006 to 2016, scientific research and development services and other scientific and technical consulting services subsectors grew by nearly 300 percent and 175 percent respectively. Nationally, both the scientific research and development services (11.9 percent) and other scientific and technical consulting services (50.1 percent) grew at a far less rapid pace. If Greater Manhattan’s research and development employment continues to outpace the national average, these subsectors will become more concentrated. These trends can assuage workforce availability concerns among prospective companies looking to relocate operations to capitalize on NBAF and other assets.
- ✓ **Bio-Defense and Security is an important component of Greater Manhattan’s research base.** According to the National Science Foundation, K-State expended \$121.9 million in animal and life sciences research in 2015. Federal, state, and institutional sources comprised the bulk of this

spending. As the research institutions throughout Greater Manhattan pull in dollars from outside of the region, these dollars get recycled throughout the regional economy as the researchers and their staff spend wages on consumer goods, housing, and other goods. Research institutions themselves might further recycle state and federal investment regionally through relationships with local equipment and services suppliers.

- ✓ **It is important to note total employment figures do not incorporate employment associated with the construction of the National Bio and Agro-Defense facility.** At its peak in the 3rd quarter of 2017 and the 2nd quarter of 2019, NBAF is expected to house 878 daily onsite construction personnel. This employment will taper off starting in the 3rd quarter of 2019 before winding down to zero in the third quarter of 2021. These workers and their families will also generate secondary economic activity leading to the creation of even more local jobs.
- ✓ **Wages offered in the public sector components of Greater Manhattan’s Bio-Defense and Security sector exceed the national average.** This is notable considering that the vast majority of regional sectors pay below the U.S. rate. State government university employees earned approximately \$52,993 on average in 2016, nearly 20 percent higher than their national counterparts. When factoring in benefits and other income supplements, total compensation for state government university employees stood at \$74,822 in Greater Manhattan. Nationally, state government university employees earned just \$63,817 annually on average. It is likely that escalated wages will continue as NBAF and bio-security firms seek to attract top talent to the Manhattan Area.

OCCUPATIONAL TRENDS

As configured for this target, **Greater Manhattan’s Bio-Defense and Security occupations number 3,625 positions, or 5 percent of the regional total.** While these workers will not all have skills that are immediately transferable to NBAF or a private Bio-Defense and Security firm, the high number of potential workers who could be trained for these positions is a compelling attractor for outside prospects.

BIO-DEFENSE AND SECURITY OCCUPATIONS, 2006-2016

SOC	Description	Jobs	LQ	Employment Change, 2006-2016			Projected Workforce Surplus/Shortage	
				#	%	US %	#	US
17-2020	Agricultural Engineers	<10	4.3	-	-	13.3%	-	105
17-2030	Biomedical Engineers	<10	0.3	-	-	22.0%	-	-2,938
17-2040	Chemical Engineers	10	0.5	-	-	1.9%	-2	-3,522
17-3020	Engineering Technicians, Except Drafters	148	0.7	14	10.2%	-1.7%	-23	-101,866
19-1010	Agricultural and Food Scientists	45	2.9	3	7.7%	8.5%	12	-2,513
19-1020	Biological Scientists	47	1.0	5	11.4%	10.7%	24	12,473
19-1040	Medical Scientists	24	0.5	1	5.9%	12.7%	-6	9,663
19-1090	Miscellaneous Life Scientists	<10	0.5	-	-	9.0%	-	1,355
19-2030	Chemists and Materials Scientists	25	0.6	3	14.5%	3.1%	-3	-6,166
19-2040	Environmental Scientists/Geoscientists	45	0.8	5	13.0%	12.2%	9	-18,486
19-2090	Miscellaneous Physical Scientists	20	1.6	4	25.1%	12.5%	-2	1,111
19-4010	Agricultural/Food Science Technicians	50	4.2	9	22.5%	10.6%	8	-3,826
19-4020	Biological Technicians	26	0.9	0	2.0%	12.5%	-3	7,924
19-4030	Chemical Technicians	16	0.4	5	51.8%	2.4%	-4	-9,568
19-4090	Misc. Life/Physical/Social Science Techs.	116	1.7	9	8.9%	12.6%	9	-2,693
25-1090	Postsecondary Teachers	1,522	2.5	41	2.7%	12.8%	-36	-417,986
25-9020	Farm and Home Management Advisors	34	8.2	2	6.4%	16.9%	-4	-4,174
25-9040	Teacher Assistants	810	1.5	16	2.0%	4.8%	-199	-322,776
43-9110	Statistical Assistants	<10	0.4	-	-	-0.1%	-	-490
11-3020	Computer/Info. Systems Managers	78	0.5	11	16.0%	18.3%	-8	-66,486
15-1110	Computer/Infor. Research Scientists	<10	0.6	-	-	21.2%	-	-154
15-1120	Computer and Information Analysts	101	0.4	12	13.0%	23.4%	-8	-90,144
15-1150	Computer Support Specialists	352	1.0	24	7.3%	13.8%	67	7,673
15-1190	Miscellaneous Computer Occupations	137	1.3	10	8.1%	10.6%	8	11,599
15-2040	Statisticians	18	1.3	5	33.8%	36.4%	-3	-5,190
	Total, Selected Occupations	3,625	1.2	190	5.3%	11.0%	-165	-1,007,074
	Total, Occupations*	74,427	-	8,553	13.0%	4.6%	-5,651	-19,444,484

* Excludes Military Personnel

Source: Economic Modeling Specialists International (EMSI)

- ✓ **Bio-Defense and Security occupations are among Greater Manhattan's most highly concentrated relative to the average community nationwide.** Agricultural engineers (3.6 times as concentrated as the national average), agriculture and food scientists (2.6 times), agricultural and food science technicians (4.3 times), and statisticians (1.2 times) displayed particular areas of specialization within the Bio-Defense and Security sector. Companies utilizing these specific skill-sets may find Greater Manhattan a compelling destination from a workforce availability standpoint.

- ✓ **The \$1.5 billion NBAF facility will place further strain on K-State and Manhattan Area Technical College to satisfy Bio-Defense and Security hiring demands.** An impact report conducted by K-State finds that NBAF will create 326 job directly and 236 jobs indirectly. Given the nature of NBAF research, facility employees will be among the most highly specialized, highly trained within the Greater Manhattan region.
- ✓ **Attracting highly skilled Bio-Defense and Security workers to Greater Manhattan may prove challenging.** As stated by Michael McIntosh during a recent workshop conducted by the Center of Excellence for Emerging and Zoonotic Animal Diseases, "Workforce development is also a concern... A 2015 survey of personnel at that facility indicated that a significant number do not intend to relocate to Manhattan when Plum Island is closed and its work is transferred to the NBAF."³ Combined with new positions created at the facility, NBAF could create significant workforce shortages for specific skill-sets as it ramps up its operational capacity.

STRATEGIC IMPLICATIONS

- ✓ Many regions throughout the country are leveraging institutional investment to create and/or brand innovation districts that seek to build a critical mass of innovation and development assets to encourage cross-collaboration. Such districts are geographic clusters of facilities, programs, companies, and institutions that promote co-location of entrepreneurs, entertainment, laboratory, and residential development to promote new innovations and cross-ideation. **Branding an innovation district in Greater Manhattan may further the region's value proposition for private sector Bio-Defense and Security companies.**
- ✓ **While K-State University will remain the centerpiece of Bio-Defense and Security talent development, Manhattan Area Technical College will also play a critical role in preparing students for jobs in this sector.** NBAF's sophisticated facilities will require a cadre of building maintenance and HVAC professionals to ensure that the facility maintains optimal efficiency and biocontainment. Continuing to adjust existing program offerings similar to MATC's Biosafety/Risk Reduction initiative and developing apprenticeship programs in conjunction with NBAF may give MATC students higher standing in the NBAF hiring process upon graduation.
- ✓ **Fostering cross-collaboration between Fort Riley and the National Bio and Agro-Defense Facility could benefit both institutions.** Leveraging Fort Riley's expertise in conducting large scale training exercises may enhance the National Bio and Agro-Defense Facility's mission and potentially lead to opportunities between Bio-Defense and Security researchers, global animal health first-responders, and the Department of Defense.
- ✓ **Continued enhancement of commercialization protocols at K-State and exploring research-driven enterprise creation out of NBAF could catalyze Bio-Defense and Security**

³ Center of Excellence for Emerging and Zoonotic Animal Diseases. "Workshop looks at Level 4 priorities and needs in anticipation of NBAF's Opening." Accessed on 6.22.2017 at: <http://ceezad.org/>

entrepreneurship. Reducing institutional and other regulatory barriers to commercialization is vital if the region is to spur private sector activity. So too is marketing, which will be discussed later in this report.

- ✓ **Fostering cross-collaboration between Bio-Defense and Security research and other expertise housed at K-State could further enhance regional innovation.** For example, K-State's College of Engineering is assisting the Biosecurity Research Institute in investigating new filtration and disease detection technologies. Such technologies could have a commercialized use, particularly in the food manufacturing or food production sector which is constantly in search for new technologies that detect diseases before a costly recall is needed.

TRAVEL AND TOURISM

Strategic activities related to travel and tourism fall into a different category than other economic development target sectors. While there are job creation benefits, **investments to grow tourism provide the most value from visitor spending and amenity development.** When individuals visit a community for business, a trade show or a vacation, they bring in outside wealth in the form of spending on hotels, restaurants, entertainment, and so forth. The amenities created to serve tourism markets also benefit existing residents and contribute to quality of life enhancements. Growing the travel and tourism economy requires a customized approach that is typically handled by a “destination marketing organization” (DMO). This is the case locally where the Manhattan Convention and Visitors Bureau (CVB) works to attract all manner of visitors to the region, each of whom could become a potential resident, employer, or investor. One benefit locally is that the CVB is operated under the umbrella of the Manhattan Area Chamber of Commerce. Coordination between economic development and hospitality marketing is critical, especially as talent attraction becomes as important as business attraction for a community’s future. While the targeted audiences are different, both strategies are marketing the region as a desirable destination.

Definition and Overview: Because of recent domestic talent outmigration trends, Greater Manhattan must utilize every tool at its disposal to attract and retain residents. Tourism and talent attraction often complement one another since the tourism sector is responsible for shaping a community’s image among a national and global audience. A vibrant tourism sector imparts a strong impression upon visitors and generates vital word-of-mouth and earned media “buzz” capable of drawing prospective new residents, businesses, and entrepreneurs. Greater Manhattan’s Travel and Tourism target encompasses a wide range of activities responsible for accommodating and entertaining visitors, including hotel and motel accommodation; independent artists, writers, and performers; restaurants; and amusement and recreation amenities. Targeting tourism, however, comes with an important caveat. While the sector does support regional employment growth, the bulk of opportunities within the sector pay less the regional average. While its wealth creation potential is therefore more limited than other target sectors, tourism nevertheless provides crucial entry-level positions, résumé-building potential, and important career-laddering opportunities.

Company Composition: Greater Manhattan is home to a dynamic Travel and Tourism sector with local events such as the Country Stampede and K-State athletics which draw thousands of visitors to the community. Local tourism companies and venues include Harry’s, Tubby’s Bar & Grill, the Bluemont Hotel, Wonder Workshop Children’s Museum, Sunset Zoo, and the Flint Hills Discovery Center, among many others.

Site Considerations: Travel and Tourism businesses typically locate in areas with sufficient market demand. Communities that demonstrate sizable service gaps between current and future demand can influence entertainment or dining companies’ location decisions. Hotels, on the other hand, will typically locate in areas with high occupancy rates or communities with a proven ability to put “heads in beds.” Large demand generators, be they major sporting or entertainment events, can also influence hotel location decisions.

National Trends: According to the World Economic Forum’s 2017 Travel and Tourism Competitiveness Report, the travel and tourism industry contributed \$7.6 trillion to the global economy and accounted for roughly one out of every ten jobs across the globe in 2016.⁴ Communities in the United States are well positioned to tap into travel and tourism activity; the World Economic Forum ranked America the 6th most competitive travel and tourism market. Despite challenges from international travel restrictions, disruptive technologies such as Airbnb, and the cyclical nature of visitor spending, the national tourism sector is expected to enjoy considerable growth over the next ten years. EMSI projects that over the next decade the nation will add almost 1.8 million tourism jobs, representing a growth rate of 11.1 percent.

REGIONAL EMPLOYMENT TRENDS

Greater Manhattan possesses a wealth of assets supporting the vitality of the Travel and Tourism sector. The Sunset Zoo, the Flint Hills Discovery Center, local wineries and eateries, the Country Stampede, Arts in the Park, K-State athletics, the Konza Prairie, and other destinations and events appeal to a wide variety of potential visitors. Conferences and meetings oriented around K-State program and research strengths are also a key source of potential visitation. At the same time, the region continues to expand its tourism support infrastructure. The terminal expansion at the Manhattan Regional Airport and ongoing discussions regarding non-stop flight service demonstrate the region’s commitment to improving traveler accessibility.

TRAVEL AND TOURISM EMPLOYMENT, 2006-2016

NAICS	Description	Jobs	LQ	Est.	Employment Change, 2006-2016			Wages, Salaries, and Proprietor Earnings (2016)	
					#	%	US %	\$	% of US
711	Prfrm. Arts/Spctr. Sports/Related Ind.	126	0.3	7	-52	-29.3%	11.8%	\$14,411	24.9%
713	Amusement/Gambling/Rec. Industries	314	0.4	24	-19	-5.8%	16.5%	\$16,919	76.5%
7211	Traveler Accommodation	660	0.7	30	283	74.9%	5.1%	\$15,446	50.4%
7223	Special Food Services	341	0.9	14	156	84.2%	18.9%	\$19,088	78.2%
7224	Drinking Places (Alcoholic Beverages)	343	1.9	28	-104	-23.3%	5.2%	\$8,472	47.8%
7225	Restaurants and Other Eating Places	4,562	0.9	193	1,014	28.6%	21.8%	\$13,901	77.9%
Total, All Sectors		6,346	0.8	296	1,277	25.2%	11.1%	\$14,207	64.0%
Total, All Industries		74,427	-	3,055	8,553	13.0%	4.6%	\$42,284	82.5%

Source: Economic Modeling Specialists Intl.

- ✓ **Despite low earning potential, Travel and Tourism is a growth sector for Greater Manhattan.** From 2006 to 2016, regional Travel and Tourism employment grew by 25.2 percent, outpacing the national tourism growth rate (11.1 percent) by a wide margin. Key subsectors driving Travel and

⁴ “The Travel and Tourism Competitiveness Report 2017: Paving the way for a more sustainable and inclusive future.” World Economic Forum. Accessed June 28th, 2017: http://www3.weforum.org/docs/WEF_TTCR_2017_web_0401.pdf

Tourism employment growth in Greater Manhattan included traveler accommodation (74.9 percent), special food services (84.2 percent), and restaurants and other eating places (28.6 percent).

- ✓ **The average Travel and Tourism sector employee earned \$14,207 in 2016, or \$28,080 below the regional average.** It is important to note, however, that the sector's prevalence of part-time employment can artificially lower reported wage figures.
- ✓ **Greater Manhattan's food and beverage sector is a potential Travel and Tourism niche.** Special food services (LQ = 0.9), drinking places (LQ = 1.9), and restaurants and other eating places (LQ = 0.8) were all near or above national concentrations. This is also common for a college community. Given the region's proximity to agricultural land, as well as rising interest in farm-to-table dining, Greater Manhattan could utilize agro-tourism and the region's culinary offerings to distinguish itself in an increasingly crowded Tourism space.
- ✓ Conversely, the Manhattan Area features lower relative employment concentrations in performing arts, spectator sports, and related industries (70 percent below the national average) and amusement, gambling, and recreational industries (60 percent below). These underserved subsectors indicate that there is potentially untapped demand in Greater Manhattan for these companies.

OCCUPATIONAL TRENDS

Travel and Tourism occupations employ nearly 10,400 Greater Manhattan workers. That represents 14 of all regional occupations. A high total of positions in food preparation and service is common in a small to medium sized community with a large public university. While K-State students, faculty, and staff serve as a sustainable source of patrons for restaurants, theaters, malls, and other retailers, the university itself is a major driver of Travel and Tourism activity. Thus, university-driven amenity development benefits the Travel and Tourism sector and vice versa. In the end, a critical mass of these destinations would serve as a valuable asset for talent retention and attraction as well.

TRAVEL AND TOURISM OCCUPATIONS, 2006-2016

SOC	Description	Jobs	LQ	Employment Change, 2006-2016			Projected Workforce Surplus/Shortage	
				#	%	US %	#	US
11-1020	General and Operations Managers	653	62.1%	9	1.4%	4.6%	-111	-438,327
11-9050	Food Service Managers	77	56.8%	9	12.5%	3.7%	-2	-7,676
11-9080	Lodging Managers	26	120.4%	11	73.6%	-11.0%	-3	-7,923
13-1120	Meeting, Convention, and Event Planners	22	44.2%	1	4.9%	24.9%	-5	125
27-1010	Artists and Related Workers	42	43.4%	4	9.4%	-1.0%	-19	-25,612
27-2000	Entrtnrs./Prformrs/Sports/Related Workers	305	77.8%	28	10.2%	13.0%	-10	-54,932
27-4020	Photographers	36	54.8%	6	21.4%	9.4%	4	1,510
33-9030	Security Guards/Gaming Surveil. Officers	166	29.4%	-42	-20.1%	13.1%	-14	-200,220
35-1000	Supervisors of Food Prep./Serving Workers	562	110.3%	113	25.1%	19.8%	76	40,993
35-2000	Cooks and Food Preparation Workers	1,882	120.1%	363	23.9%	16.5%	179	33,220
35-3000	Food and Beverage Serving Workers	3,202	92.6%	616	23.8%	19.2%	258	363,513
35-9000	Other Food Prep./Serving Related Workers	448	67.2%	89	24.7%	15.7%	3	-99,137
37-2010	Building Cleaning Workers	1,923	99.5%	383	24.9%	8.8%	-470	-1,208,394
37-3000	Grounds Maintenance Workers	717	108.0%	172	31.5%	10.1%	-32	-173,922
39-3000	Entertainment Attendants/Related Workers	134	47.2%	-12	-8.5%	10.9%	-8	-136,027
43-4080	Hotel, Motel, and Resort Desk Clerks	186	159.2%	81	77.0%	7.6%	19	12,854
Total, Selected Occupations		10,383	0.9	1,831	21.4%	13.5%	-137	-1,899,956
Total, Occupations*		74,427	-	8,553	13.0%	4.6%	-5,651	-19,444,484

* Excludes Military Personnel

Source: Economic Modeling Specialists International (EMSI)

- ✓ **Travel and Tourism occupations offer a source of employment opportunity to Greater Manhattan residents with less than a high school education.** Most tourism occupations typically require varying degrees of on-the-job training with no formal education requirements. However, jobs in the sector often demand a high degree of “soft” skills (punctuality, customer-service, reliability, etc.) that can help prepare workers for higher-skill and higher-wage employment.
- ✓ **Talent development for managerial careers in the Travel and Tourism sector is greatly enhanced by the Kansas State University Department of Hospitality Management.** As the only program accredited by the Accreditation Commission for Programs in Hospitality Administration, K-State’s undergraduate and graduate programs in hospitality management will be an important asset to address managerial shortages encountered over the next ten years. Retirements combined with projected employment demand could lead to a shortfall of 111 general and operations managers in the Manhattan Area over the next ten years (2016-2026).
- ✓ **As the Travel and Tourism sector continues to grow, low concentrations among certain occupational categories may limit expansion potential.** For instance, meeting, convention, and event planners (60 percent below the national average) were far less concentrated in the Greater

Manhattan region; a situation that could impact the region's competitiveness for conventions outside of social, military, education, religious, and fraternal (SMERF) events.

STRATEGIC IMPLICATIONS

- ✓ **Better aligning Travel and Tourism and talent attraction marketing campaigns could reshape state and national perceptions about Greater Manhattan's attractiveness as a place to visit or live.** Throughout public input, stakeholders noted that if prospective residents "just got to know" Greater Manhattan it would be enough to sway their location decisions. Indeed, the number of "boomerang" residents (those who left Greater Manhattan and have since returned) is a testament to the pull of the region's quality of life offerings.
- ✓ **Destination marketing not only plays a role in talent attraction, but can also positively impact business recruitment and development.** Communities frequently leverage major local events to invite site selectors and corporate executives for familiarization (fam) tours of the region. Greater Manhattan could use K-State athletics or other community events for inbound marketing opportunities. Greater Manhattan also has the added potential to utilize K-State's alumni network to reach a wide array of business owners or executives charged with making site selection decisions.
- ✓ **Expanding air capacity could allow Greater Manhattan to tap new visitor markets.** Additional nonstop destinations and frequencies would also be a great benefit to the region's institutional anchors as well as current and prospective employers. However, declining year-over-year passenger arrivals at the Manhattan Regional Airport (MHK) are a potential concern. According to the Bureau of Transportation Statistics, passenger arrivals at MHK declined by -6.46 percent from March 2016 to March 2017.
- ✓ **As artificial intelligence and machine learning sweep through the Travel and Tourism sector, Greater Manhattan could use civic hackathons to develop innovative methods to connect the region to new audiences.** Engaging K-State College of Engineering students will be vital to a hackathon's success. Offering a cash prize, scholarship, internship opportunity, or startup funding could garner interest among the university's tech-savvy student population.
- ✓ **Due to its wealth of agricultural land, agro-tourism could be a competitive niche for Greater Manhattan.** Communities across the country are leveraging their agricultural assets to promote vineyards, wineries, distilleries, breweries, and other agricultural assets to support visitation. Vineyards and wineries, for instance, provide district travel experiences where visitors learn how wine is produced as well as how to determine its quality. Other agro-tourism related activities include brewery and distillery tours and tastings.

MARKETING REVIEW

This review of Greater Manhattan's economic development marketing efforts complements the Target Sector Analysis by confirming the viability of existing programs and identifying potential enhancements to future efforts. Market Street's framework for assessing community and economic development marketing programs is based on our client communities' efforts and best practices from top chambers and economic development organizations, regions, institutions and companies. Coupled with the key findings of the Community Assessment and Target Sector Analysis, Market Street will leverage the principal takeaways of the Marketing Review to directly inform development of key components of the Greater Manhattan Project Community and Economic Development Strategy.

Economic development marketing in the region is principally managed by **Manhattan Economic Development (MED)**, a division of the Manhattan Area Chamber of Commerce, and its two-person Economic Development Staff. Programmatically, MED is primarily focused on expanding existing businesses (especially in the 25 to 50 employee range), supporting and facilitating entrepreneurial and small business growth, and attraction of retirees. It does not invest a significant percentage of its budget on external meeting attendance and prospecting. For a community with such a public-sector-driven economy and corresponding workforce concentrations, relative geographic isolation, currently non-competitive state incentives capacity, and other factors, this has been a smart strategy. In addition, MED's service geography does not feature the large sites necessary for many major relocation projects nor do many sites abut freight rail lines or have access to multimodal trans-load infrastructure. Lastly, the Manhattan Area's workforce lacks the availability to support the expansion or relocation of employers looking to create large numbers of new jobs.

Despite legislative actions reversing Kansas' recent tax cut policies, the same current lack of resources that has drained the state's incentive funds also threatens near-term budgets for institutions such as Kansas State University. Until state coffers recapitalize, the urgency to identify investment and private-sector partners from outside the community has therefore been heightened. The future launch of NBAF also presents a transformative economic development opportunity for Greater Manhattan to leverage, likely warranting a more resource-intensive and high-profile external marketing program.

The Manhattan Area Chamber is also a member of an innovative economic development alliance known as **Manhattan Knowledge Based Economic Development (KBED)**. Targeted at knowledge-based companies, KBED is a partnership between Kansas State University and six local, regional, state, national, and institutional entities that recruits companies to expand or relocate to Greater Manhattan. Prospects are offered the chance to initiate or grow a collaborative relationship with K-State and foster a strong entrepreneurial environment. The program's focus is on companies that complement K-State's research strengths in Animal Health, Food Science and Safety, Grain Science, Mechanical and Nuclear Engineering, Nano Science, and Plant Science.

More broadly, Greater Manhattan is included in a major two-state marketing effort branded the **Kansas City Animal Health Corridor** (<http://kcanimalhealth.thinkkc.com>). Managed by the Kansas City Area Development Council, the Corridor promotes a huge mega-region anchored by Manhattan, Kansas, and

Columbia, Missouri to prospects in the animal health sector. The Corridor is home to over 300 animal health companies, the largest such concentration in the world.

Manhattan also joined other Kansas-based communities Topeka and Lawrence to promote the corridor as the **Kansas Research Nexus**. While officials say the initiative's website (<https://kansasresearchnexus.com>) is out of date, meetings have been initiated to refresh and reinvigorate the campaign and its tools. Currently, the partnership is branded as "Great minds. Combined."

Economic Development Marketing Overview

Prior to an assessment of Greater Manhattan's current external marketing efforts, it is instructive to present the components of a typical, fully-invested program to highlight the extent to which communities promote a brand, message, and competitive profile to external investors and internal constituents. These core programmatic elements are applicable and adaptable across many communities and serve to highlight the competitive advantages and opportunities that differentiate a market from its peers. In addition to messaging, programs should focus on the relationship-building necessary to ensure that corporate and economic development "influencers" have the community on their radar as they consider locations for investment. In the end, however, marketing is just one of three legs on the "stool" of effective economic development, including existing business retention and expansion, and small business/entrepreneurship support services.

Best practice programs focus both on internal (key investors, existing businesses, entrepreneurs, government, institutions, organizations, and residents) and external (site selectors, prospective companies, future residents, and skilled workers) audiences. They are professionally staffed, sufficiently funded, and targeted on sectors that provide the greatest opportunity for high-value growth. External marketing focuses on communicating to outside audiences the community's competitive assets and opportunities. Internal marketing addresses the need for local stakeholders to understand strategic development initiatives, efforts to enhance competitiveness, and be able to effectively tell the community's "story" to companies, talent, and visitors. Residents and businesses must be vocal champions for their community; not only is every visitor to a community a potential investor or resident, but companies and site consultants often seek out business leaders independent of visits with economic development officials in order to get unbiased and informed opinions about the local business climate.

The following sections describe the principal components of most professional economic development marketing programs.

COMMUNITY BRAND

In marketing, a brand is often described as a “promise fulfilled.” It is less about a cute tagline and more about presenting a value proposition that can be supported by results. The idea of a brand was historically synonymous with corporations and their logos and projected “personalities” that identify the company and its products to consumers. However, the understanding of branding now goes beyond a designed symbol for a product and reflects a broader set of characteristics, including expertise, consistency, and innovation. Apple Inc.’s products are desired throughout the world, not because of a picture of an apple, but because they have the widely-held perception of being cutting-edge, usable, and accessible.

So too must a community work to establish its own brand, a concept that must be consistently and easily represented through its logo, messaging, marketing outreach, materials, and actions. According to CEOs for Cities, a community brand “is a tool that can be used by cities to define themselves and attract positive attention in the midst of an international information glut.” The community brand should be understood as the umbrella under which marketing activities occur. Successful marketing and messaging will be reflective of the values, competitive advantages, and opportunities that are inherent in the brand.

DIRECT SALES

Direct sales are activities that place economic development organizations (EDOs) face-to-face with their target audiences. These activities include marketing missions, in-bound events, and trade show attendance. Direct sales strategies are important for relationship-building with key corporate and professional influencers and decision-makers. Consistency in direct sales is critical so that EDO staff and key local volunteers can leverage multiple meetings with prospect companies and site consultants to build relationships that can eventually bear fruit through new investments or relocations.

Marketing Missions

Marketing missions are opportunities for EDO staff and key local public and private leaders to travel to domestic or international markets that can provide good opportunities to meet with and attract targeted companies to the community. These missions should entail detailed pre- and post-trip planning to ensure that time spent in the market is maximized and future trips can be planned and programmed to provide the highest value possible.

In-Bound Marketing Events

In-bound events are often planned around a major local festival or attraction (i.e., South-by-Southwest in Austin, the Jazz Festival in New Orleans, or a major sporting event like the Super Bowl or Final Four). The event must be compelling enough to secure commitments from corporate and site location professionals who often field multiple offers at one time. As with marketing missions, in-bound events should be carefully and strategically programmed to ensure face-time with decision-makers and site consultants is optimized.

Trade Shows and Real Estate Events

Typically associated with industry sectors (aviation, biotechnology, agriculture, etc.) or real estate associations (NAI, SIOR, CORENET, etc.), these shows and events can be ways to invest in marketing opportunities geared towards target sectors or communicate to site consultants and real estate professionals the community's competitive strengths and targeted opportunities. While they can be useful, these trips are often cost-intensive (travel, booth display, marketing materials, etc.) and crowded, with hundreds or thousands of competing communities vying for attendees' attention. Local communities should always try to piggyback trips with state organizations that might shoulder more of a fiscal load. On the whole, marketing missions tend to provide more value than these industry events and should be prioritized as such.

WEBSITE

A professional, consistently updated, user-friendly, and content-driven website is an absolute necessity in today's economic development climate. A chamber or economic development organization website is often the front door to the community—a first impression to site selectors, prospective companies, and future residents. The website can also help build, shape and support relationships with internal constituents. Simply stated, an economic development organization's website must be easily navigable, visually appealing, and contain complete, accurate and sought-after information. That is not a future goal. It is the standard by which the community is judged.

SOCIAL MEDIA

Leveraging social media as a vehicle for business and economic development marketing has become an integral component of most organizations' toolkits. EDOs able to capitalize on new and dynamic tools with flexibility, discretion, and targeted success are reaching new markets and building trust and communication among existing audiences. There are many reasons for economic development practitioners to utilize social media networks and tools; principal among them is being able to contribute to and guide online conversations that are shaping how communities are perceived and promoted.

ONLINE AND TRADITIONAL MEDIA

The move to an around-the-clock news cycle and constant online media coverage creates many opportunities for communities to gain publicity. However, not all coverage is created equal. Three types of media coverage—paid, owned, and earned—impact the authenticity and legitimacy of messaging. With so much information inundating consumers and clients, it is important that publicity be genuine and engaging.

- **Earned Media:** Coverage stimulated by an organization "winning" coverage by reaching out to and interacting with a third-party channel. This type of coverage carries the most legitimacy and authenticity as it is part of an ongoing information flow. Of course, this kind of coverage is harder to control and can, at times, be negative. The proverbial "buzz" is a type of earned media, and usually the result of a strategic media relations effort.

- **Paid Media:** An organization pays for a story or advertisement. The credibility of this type of media is low as consumers are less inclined to take an organization's word for it. However, the organization has much more control over and closeness to the message, a level of influence that not replicated with other forms of coverage.
- **Owned Media:** The dissemination channel is part of the outputting organization. Examples include organization newsletters (printed and electronic), websites, blogs, promotions, and press releases. This type of coverage can be closely controlled, and defined audiences can be targeted with specific messages. Though some may question the trustworthiness of the message, quality owned media can often stimulate earned coverage.

PRINT COLLATERAL

The use of print collateral, including brochures, direct mail, print advertising, and handouts, has faded in recent years but still bears some importance to many economic development marketing campaigns. Much of this collateral is used to paint a picture of the competitive nature of a community's business climate and thus aimed at business prospects. The tangibility of print collateral and its ability to reach a specific audience increase its appeal; however, chambers are increasingly finding mail and print collateral to be less successful tools when compared to other marketing efforts. Drawbacks to these kinds of marketing techniques include cost and staff time, homogenous messaging, competition with other mail, ease of discard, inability to directly track metrics, and rapidly changing data that can be obsolete in the time between designing the collateral and printing and distributing it. Thus, the trend among economic development organizations has largely been to move away from investments in print collateral.

Greater Manhattan Marketing

Manhattan Economic Development does not work from a formal marketing plan but rather implements specific program components. In partnership with the Chamber, these include handling prospect inquiries, managing a website, working with local companies, engaging in entrepreneurship development efforts, partnering on major projects like NBAF, attending selected trade shows and meetings, implementing a retiree-attraction initiative, and participating in broader collaborations like KBED, the KC Animal Health Corridor, and Kansas Research Nexus.

COMMUNITY BRAND

Greater Manhattan's brand – "The Little Apple"® – and distinctive apple logo are great strengths of the region and a real differentiator in the marketplace. The scheme is utilized across all platforms under the Manhattan Area Chamber umbrella, including the Chamber itself, Manhattan Economic Development, and the Manhattan Convention and Visitors Bureau. The City of Manhattan's official logo does not display the apple theme, but might benefit from referencing this compelling and memorable graphical scheme.



DIRECT SALES

Direct sales is not as prominent an investment for Manhattan Economic Development as other U.S. economic development organizations. As stated earlier, this is not necessarily a bad thing considering Manhattan's competitive position and the fact that the vast majority of jobs are created by existing businesses and new local enterprises. However, a more visible external program might hold future benefit as NBAF launches and K-State is increasingly dependent on outside investors to support its research and commercialization ambitions. This could either be accomplished by MED or under the auspices of KBED.

The collapse of the Kansas Department of Commerce (KDOC) under the weight of statewide budget cuts has significantly diminished its role as an economic development partner for Manhattan and other Kansas regions. In the short-term at least, KDOC will not have sufficient assets to support regional economic development to the extent it did previously.

Targeted Outreach

The Manhattan Area Chamber is fully engaged with local and regional corporate officials, real estate professionals, developers, brokers, and other influencers. Externally, staff participates in events hosted by KCADC where prospects and site consultants are present and also attends a two-day site selector conference every fall. Because external marketing is a lower priority program for Greater Manhattan, more extensive networking tools such as the use of a marketing database and more frequent contact with relocation professionals are not pursued.

Manhattan Economic Development also benefits from the Manhattan Area Chamber's participation in KBED. The breadth of assets at K-State and their attraction to outside investors is powerful and can potentially help partners like MED fill its prospect pipeline with firms that are drawn to the region because of K-State but might also be looking for opportunities outside of the university's priority research focus areas.

Lead Generation

While some regions contract with a consultant to provide them with a minimum number of prospect leads, this is not an investment made by MED. Again, this is a wise strategy as these leads almost never pan out as

actual projects. As its capacity has dwindled, KDOC has become a far less significant generator of leads for Manhattan, though KCADC and its KC Animal Health Corridor initiative have led to some inquiries into Manhattan, especially as related to leveraging of K-State's capacity. KBED is another viable source of leads for Greater Manhattan; KBED staff manage these prospects in partnership with the other six members of the alliance.

Marketing Missions

Manhattan Economic Development budgeted for two two-day outbound headquarters prospecting visits in 2017; none were taken in 2015 or 2016. MED does not lead nor participate in speculative out-of-market prospecting trips either domestically or internationally. Many times these are "pay-to-play" opportunities via larger EDOs or are tag-along trips with a state governor or economic development team.

In-Bound Marketing Events

In 2015, MED hosted 11 site consultants in the biosciences space for a K-State football game in partnership with KDOC. The consultants also toured Topeka during the event. In 2016 and again in 2017, Greater Manhattan is home to a Pet Food Workshop in which companies come to the community for two days of meetings. This is a good opportunity to expose corporate decision makers to the Manhattan Area's competitive advantages for this sector.

After NBAF's launch, MED might consider hosting site consultants and prospect companies for annual tours of the facility, meetings with K-State researchers, community tours, and other activities.

Trade Shows and Real Estate Events

Greater Manhattan economic development staff attend a select number of events per year as seen in the following year-to-year agendas for 2015-2017. Industry focus is almost exclusively on the pet food sector, which is complemented by more broadly focused KCADC events and, new for 2017, the aforementioned site selector event.

2015

- Site selector FAM tour in Manhattan

2016

- PetFood Experience, Kansas City, 1 day
- PetFood Forum, Kansas City, 2 days
- KCADC events, Kansas City, 1 day

2017

- PetFood Experience 1 day
- PetFood Forum 3 days
- Site Selector event (fall) 2 days
- 3 KCADC events 1 day each

Market Street feels that trade show attendance has, on average, a very low return on investment. This is especially true for the extremely large global shows like BIO and the Paris Air Show. There is simply too much competition for a community of Manhattan’s size to truly stand out.

However, NBAF changes the equation in terms of biosecurity-focused events. MED, KBED, and other organizations should collaborate on smart, cost-effective, but meaningful strategies to identify the highest value biosecurity shows for attendance and potential sponsorship.

WEBSITE

The online presence of a regional economic development organization must be its most polished and effective marketing tool. Websites are typically the point of first contact for prospects and site-location professionals, who will only contact a community (either directly or through a regional or state agency) once a short list of destinations has been developed. Therefore, economic development websites must be graphically compelling, user-friendly, logically designed and structured, and provide a wealth of timely information on all aspects of the regional economy, population, physical assets, and quality of life and place amenities.

Manhattan Economic Development

<http://www.manhattaned.org>

Because of its name and affiliation with the Manhattan Area Chamber, the region’s principal organization for business, Manhattan Economic Development’s website will likely be the point of first contact for site selectors and prospects interested in the community. Internet searches confirm that manhattaned.org is either the top or among the top results for a search of “Manhattan Kansas economic development.” As such, it is critical that MED’s website meets industry standards for design, content, and utility. However, there are certain aspects of manhattaned.org that could be improved.

MANHATTAN ECONOMIC DEVELOPMENT: UTILITY AND DESIGN

Overall design and layout	<ul style="list-style-type: none"> • Overall, the site has a nice clean look and visual appeal. Use of images and graphics is effective as opposed to a text-heavy design. • Color schemes are vivid and consistent with other sites in the Chamber family. • Sub-pages are far less visually dynamic and appealing and feel more hastily assembled.
Home page	<ul style="list-style-type: none"> • The landing page is well-designed, with compelling images of Greater Manhattan and a well-paced scroll of the region’s “top place” accomplishments. • Interactive icons in the upper left corner are effectively used and – in a very useful feature – are locked into the page scroll. Icons at the bottom of the home page are also well-designed. • Blank space at the top of the page could be better used, perhaps for flag links to foreign-language versions of the site or sponsored advertising.

	<ul style="list-style-type: none"> • Drop-down headers in the top quadrant of the page are plainer and less compelling than other page text, with two of them (Regional Partnerships and Transportation) not populating sub-links when moused over.
Navigation	<ul style="list-style-type: none"> • Navigation is fairly intuitive and user-friendly, with all links being active. • Including the link tree near the top of the page is a very useful feature. • It is also appreciated that links do not open in new browser windows. • Placement of the home page's upper-left icon links on every sub-page of the site is a helpful tool.
Contact information	<ul style="list-style-type: none"> • Contact information is linked from an icon and hyperlink at the bottom of the landing page, but a more prominent placement on the top navigation bar or block of icons in the upper left would be more effective. • There are also "Contact Us" links on various subpages, but they are not prominently displayed.
Interactivity	<ul style="list-style-type: none"> • The "share" icon is very well designed and thorough with logos of most major social media sites represented. Each one is also active, which is not always the case on EDO websites. • There is not the level of interactivity that most site consultants expect from best-in-class economic development sites, including customizable mapping and data tools in a downloadable format. • While there is a searchable property database, the "Maps" page includes only a generic multi-state "where we are" map and a link to the GIS system of Riley County. As a regional organization, MED should link to all counties in its geography.
Timeliness of information	<ul style="list-style-type: none"> • While labor force information is current, cost of living data lags a year. • The Community Profile report in PDF format linked from an icon on the bottom of the home page contains much useful information, but it is not customizable or downloadable. Many of the tables do not contain the most recent data available.
Search hierarchy⁵	<ul style="list-style-type: none"> • First listing on Google, Bing, and Yahoo for search of "Manhattan KS economic development"
Content	<ul style="list-style-type: none"> • <i>(see following two tables)</i>

Adapted from the American Chamber of Commerce Executives Awards for Communications Excellence (ACE) scorecard and Southern Economic Development Council Communications Awards score sheet

⁵ Note: the "Search Hierarchy" component of this report's website assessments relies on only the most logical search terms associated with Manhattan Area economic development and is not intended to be inclusive of all possible search iterations. EDOs should ultimately rely on web analytics to assess and identify the most commonly used search terms to access their sites and invest in search engine optimization (SEO) tools accordingly.

TOP 10 MOST USED ECONOMIC DEVELOPMENT WEBSITE PAGES

1	2	3	4	5	6	7	8	9	10
<i>About Us</i>	<i>Programs</i>	<i>Data Center</i>	<i>News</i>	<i>Relocate & Expand</i>	<i>Find Property</i>	<i>Site Selection Services</i>	<i>Workforce Information</i>	<i>Large Employers</i>	<i>Maps</i>
N	N	N	N	Y	Y	Y	Y	Y	Y

The Manhattan Economic Development site features many of the most used website pages as detailed in the previous table, but they are not presented in the most user friendly manner and, in the case of data, are provided as a static PDF document with some of the data not current.

MOST USED INFORMATION BY SITE SELECTORS

<i>Contact Info</i>	<i>Incentive Programs</i>	<i>Tax Rates</i>	<i>Recent Announcements</i>	<i>Target Industry Info</i>	<i>Interactive Mapping Tool</i>	<i>Site Building Inventory</i>	<i>& Workforce Training Info</i>
Y	Y	Y	N	N	N	Y	Y

As stated previously, providing information is different than providing information usefully and effectively. While ManhattanED.org contains data most frequently sought out by site selectors, this information is static, not kept completely current, and is not available in spreadsheet form.

Consideration should be given to revamping the Manhattan Area’s economic development website to better serve as a tool to promote the region to potential investors and their contracted representatives.

Manhattan Knowledge Based Economic Development

<http://www.pickmanhattan.com/>

This website serves as the principal information portal for the regional economic development alliance fostering investment and partnership opportunities with Kansas State University. It is essentially the primary online tool for K-State, its Foundation, Institute for Commercialization, Research Foundation, the City of Manhattan, the Manhattan Area Chamber, and the North Central Kansas Community Network to receive and direct inquires about K-State economic development opportunities. As such, it is a vital component of Greater Manhattan’s external marketing portfolio.

MANHATTAN KBED: UTILITY AND DESIGN

Overall Design and layout	<ul style="list-style-type: none"> Overall, the PickManhattan.com website is well designed, visually compelling, and professional in layout and content. Market Street appreciates that the “apple” logo was utilized for the masthead and colored purple for K-State.
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	<ul style="list-style-type: none"> • Because the draw of the KBED alliance and program is the resources of K-State, partners must acknowledge that more frequent and explicit use of the K-State wildcat logo and brand would better communicate that PickManhattan.com is the principal vehicle for exploring investment opportunities with the university.
Home page	<ul style="list-style-type: none"> • By and large the PickManhattan.com landing page is dynamic and effective. However, it can feel cluttered at times with a lack of consistency between themes. For example, messaging shifts from K-State resources to Manhattan’s destination appeal to an oddly placed quote about K-State students wanting to stay in Manhattan if they can find a job. • The images clearly demonstrate the most useful sub-page links, though, as was stated, we would like to see more direct visual references to K-State. The KBED logo on the masthead could also be larger. • We appreciate the placement and utility of the Menu bar, but would like to see it and the “share” and navigation menus populate automatically when hovered over by the cursor. • The “Manhattan Has Your Business Answers” crossword image would seem to be a link like the two images next to it, but it is not active. • The inclusion and placement of the KBED partner links at the bottom of the page is effectively done.
Navigation	<ul style="list-style-type: none"> • Overall, navigation is satisfactory and largely intuitive. But, as noted, we would like to see drop-down menus populate when hovered over by the cursor. • For certain menus, there are also too many sub-pages. For example, it takes three to four clicks to access K-State engineering focus areas and other more detailed information. • We would also like to see a link tree available on every sub-page so the user can return to previous pages without having to hit the back button.
Contact information	<ul style="list-style-type: none"> • Contact information is readily available from the prominently displayed Menu link in the upper right corner of all pages. • We appreciate not only that there is a full staff listing for all key partner contacts but also that headshots are provided. This is a nice personal touch and provides visual appeal beyond simply listing names and phone numbers.
Interactivity	<ul style="list-style-type: none"> • There is very little interactivity in the website. Even pages where one would think interactive links would be provided – for example, “Find Talent” – often do not connect to referenced resources. • There are no mapping or customizable data tools on the site.
Timeliness of information	<ul style="list-style-type: none"> • There is no easily identifiable, readily available data on the site. • The only exception found was a table listing recent K-State grads by major, which was up to date for the current year.

Search hierarchy	<ul style="list-style-type: none"> • PickManhattan.com is the sixth listing on Google for a search of “Manhattan KS economic development”, does not show as a link on the first Bing results page, although is listed on the “local results” map; and is the eighth listing on Yahoo, though not listed on the results map. • A search for “Kansas state economic development” yields the following results: for Google, neither PickManhattan.com nor a KBED description on a K-State link shows up on the first results page; for Bing, PickManhattan.com not on first listings page, though KBED shows up in the fourth listing in a description of a K-State link; for Yahoo, same results as Bing. • A search for “Kansas state university economic development” yields the following results: the KBED descriptor on the K-State site is first, though PickManhattan.com is the ninth listing; for Bing, KBED on K-State site is first, with PickManhattan.com not showing up on the first listings page; for Yahoo, the same as Bing.
Content	<ul style="list-style-type: none"> • (see following two tables)

Adapted from the American Chamber of Commerce Executives Awards for Communications Excellence (ACE) scorecard and Southern Economic Development Council Communications Awards score sheet

TOP 10 MOST USED ECONOMIC DEVELOPMENT WEBSITE PAGES

1	2	3	4	5	6	7	8	9	10
<i>About Us</i>	<i>Programs</i>	<i>Data Center</i>	<i>News</i>	<i>Relocate & Expand</i>	<i>Find Property</i>	<i>Site Selection Services</i>	<i>Workforce Information</i>	<i>Large Employers</i>	<i>Maps</i>
Y	Y	N	N	N	Y	N	Y	N	N

Though PickManhattan.com is not a “typical” EDO website, it should still feature the content most used and expected on similar sites. If a prospect or site selector happens upon KBED’s link after a web search, there is the potential for frustration because this information is not provided. This is also true for the criteria featured in the following table of site selectors’ most used information.

MOST USED INFORMATION BY SITE SELECTORS

<i>Contact Info</i>	<i>Incentive Programs</i>	<i>Tax Rates</i>	<i>Recent Announcements</i>	<i>Target Industry Info</i>	<i>Interactive Mapping Tool</i>	<i>Site Building Inventory</i>	<i>& Workforce Training Info</i>
Y	N	N	N	Y	N	Y	Y

Manhattan Convention and Visitors Bureau

<http://www.manhattancvb.org>

As a division of the Manhattan Area Chamber, the Manhattan Convention and Visitors Bureau features a website that serves as an online gateway for prospective and returning visitors. The website, ManhattanCVB.org, is an effective one-stop shop for potential and returning visitors to identify tourist

attractions, dining options, accommodations, and cultural as well as entertainment events in Greater Manhattan. The site is consistent with expectations for best-in-class design and content among those interested in the Manhattan Area as a destination.

MANHATTAN CONVENTION AND VISITORS BUREAU: UTILITY AND DESIGN

Overall Design and layout	<ul style="list-style-type: none"> • The Manhattan CVB site is graphically appealing, well designed and formatted, and content-rich. It is a quality tool for promoting the region’s tourism assets. • The website’s layout encourages quick scanning and easily accessible information crucial to visitors choosing a travel destination. • Including the graphical “Life in the Little Apple” link prominently on the top of the site with links to information on the region as a place to live is a welcome acknowledgement that visitors to the area are also potential residents, investors, and business owners.
Home page	<ul style="list-style-type: none"> • All relevant social media links, information, and tools such as booking of rooms, listing of events, and photos of top destinations are present on the home page in easily accessible format. • The shifting images on the top half of the home page are well timed and compelling. • We appreciate the large search icon and the prominent posting of recent blog postings.
Navigation	<ul style="list-style-type: none"> • Navigating the Manhattan CVB website is fluid, intuitive, and user-friendly. • We like that all sub-menus appear when hovering over a link. • Moving through the many sub-pages is also user-friendly; the inclusion of a link tree near the top of the page is an effective addition.
Contact information	<ul style="list-style-type: none"> • Provision of contact information is less important on a tourism site than an economic development site. However, the information is usefully provided. • We especially like that the Contact Us link on the bottom of the page takes the user to a full searchable staff listing.
Interactivity	<ul style="list-style-type: none"> • Interactive tools are effectively provided on the ManhattanCVB.org site. • Visitors are able to book hotels, get directions to attractions, search for events between their arrival and departure dates, and follow the CVB’s social media accounts. • Embedded videos and blog postings are also welcome additions.
Timeliness of information	<ul style="list-style-type: none"> • The event calendar is current and well displayed in large font.
Content	<ul style="list-style-type: none"> • In terms of planning a trip or choosing a vacation destination, ManhattanCVB.org provides all of the information required to make an informed travel decision.

- As mentioned, the inclusion of information on Greater Manhattan as a place to live is also a creative and important feature.

Adapted from the American Chamber of Commerce Executives Awards for Communications Excellence (ACE) scorecard and Southern Economic Development Council Communications Awards score sheet

Retire to the Flint Hills

<http://www.retiretotheflinthills.com>

The online component of the Manhattan Area Chamber's retiree-attraction program, RetiretotheFlintHills.com is more of a shell site than a content-rich tool. Featuring a large silhouette of a golfer and a quote about "chasing new dreams," the site has no embedded content except for a video on the home page that links to a YouTube profile of the Flint Hills as a retirement destination. However, the video is not prominently displayed, contained in a small window in the lower left corner of the home page. There is a "f" icon in the lower left of the homepage that links to the program's facebook page, but it is easy to miss.

Large links on the top of the page to "Request Free Information about Manhattan" and a contact button open a new Gmail browser window to email the program director. In one browser used by Market Street – Firefox – the links directed the user to a tutorial on setting up Gmail. The links were operational, however, in Chrome and Opera.

Six informational links on the bottom of the page open new browser windows to display associated content on the Manhattan Area Chamber, Manhattan CVB, and Manhattan Economic Development websites. Unfortunately, the "Real Estate Locator" hyperlink leads to a commercial property database that has no information on housing. This would not likely be useful to a potential retiree. The "Life in Manhattan Info" link directs to an error message reading, "We're sorry, but there is not a web page matching your entry."

Though the video is compelling and professionally produced, the rest of the site does not feature content specifically targeted to the retiree audience.

SOCIAL MEDIA

For the purposes of this report, Market Street analyzed the social media of the Manhattan Economic Development division as these tools would be of greatest interest to the economic development community. Social media feeds for the Manhattan Area Chamber and CVB are likely too broad to have viability for prospect companies and site consultants. A review found that Manhattan Economic Development currently does not maintain a social media presence. Specific sites are detailed further in the following bullets.

- **facebook** – The facebook icon on the Menu bar in the upper left of the Manhattan Economic Development website links to the feed of the Manhattan Area Chamber. Though this feed is active and updated often with new content, the posts often feature topics and events that would not be of specific interest to economic development professionals, site consultants, or corporate prospects.

- **Retire to the Flint Hills** – The Chamber’s retiree-attraction program maintains an active facebook profile. It is updated regularly and includes relevant content. Contact information to the program director is prominently displayed. This is the most useful tool associated with the Retire to the Flint Hills initiative.
- **LinkedIn** – LinkedIn is arguably the most important social media tool for economic development because it is wholly focused on business networking. Many EDOs are now targeting LinkedIn as key content-delivery vehicle. Manhattan Economic Development currently does not have a dedicated account on this service.
- **Twitter** – The twitter icon on the top-left menu bar of the ManhattanED.org website links to a message reading, “Sorry, that page does not exist.”
- **YouTube** – The YouTube icon on the top-left menu bar on the ManhattanED.org website brings up a display that reads, “Social Networking: Coming Soon! Check back soon to follow Manhattan, KS Economic Development on Facebook and Twitter!”

ONLINE AND TRADITIONAL MEDIA

Earned Media

Manhattan Economic Development currently does not invest in public relations, though capitalizes on media outreach from the Manhattan Area Chamber and Manhattan CVB. Market Street recommends investments in public relations programming be made with a proven firm that can provide value and differentiated service for their clients. An objective article on Greater Manhattan in the *Wall Street Journal* would be more impactful than any ad that could ever be purchased.

Paid Media

Manhattan Economic Development does not invest in print or online advertising; as such there was nothing to review for this report. However, there is a banner ad purchased on the local newspaper website (The Mercury) for the Retire to the Flint Hill’s program. The ad is located below the paper’s twitter scroll and links to the RetiretotheFlintHills.com website reviewed earlier in this section.

Owned Media

Manhattan Economic Development does not produce a newsletter either in online or printed form.

Manhattan Economic Development also does not produce an annual report. Staff references the City of Manhattan’s 2015 Economic Development Annual Report as a record for recent job creation activities.

City of Manhattan, 2015 Economic Development Annual Report

The City of Manhattan’s most recent annual report covers the 2015 calendar year with updates for 2016. The 90 page document is very comprehensive and addresses all aspects of the city’s incentives program, including recent projects and performance of past recipients. Schematics of local economic development partnership and prospect/project referral dynamics are also included. The Annual Report serves as an important record of job and investment creation spurred by efforts of the city’s Economic Development office.



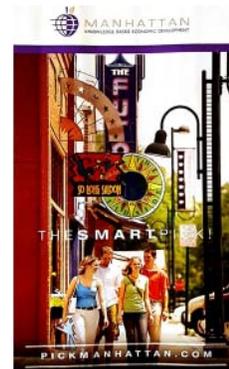
PRINT COLLATERAL

Manhattan Economic Development does not develop or distribute print collateral. However, through its participation in the Manhattan Knowledge Based Economic Development partnership, the Manhattan Area Chamber and MED benefit from the materials designed and produced by KBED. The two principal collateral pieces are a brochure and an information sheet.



Seen at left, the information sheet is a high-level, two-page description of KBED, the partners, and the process the alliance pursues to achieve its goals. On the back of the sheet is a list of key community and university information, logos of companies that have invested in Manhattan and contact information for the program administrator. The sheet is a brief but effective overview of KBED and its activities. As opposed to the KBED website, the collateral piece prominently displays KBED’s association with Kansas State University, including a photo of the administration building in the background and the university’s logo positioned on the front and back of the sheet.

The brochure is a four-fold information booklet on the community with the KBED logo at the top, the PickManhattan.com URL on the bottom, and the tagline “The Smart Pick” superimposed over an image of Aggieville. As opposed to the flyer, the brochure is more broadly focused on Manhattan as a destination for investment including, yet complimentary to the opportunities provided by Kansas State University. The booklet is effectively designed and contains multiple categories of information that would be useful for corporate, institutional, and talent prospects interested in community. The back of the brochure touts Manhattan’s selection as the site of NBAF and also contains contact information for Manhattan Area Chamber staff.



Findings

Economic development marketing in the Manhattan Area is less robust than for certain competitors of its size and assets, but that is intentional. Without “megasites,” region-wide rail access, or deep, diverse workforce to support major relocations and expansions, economic development professionals correctly believe that the highest value investments are in growing medium-sized and small firms, supporting technology startups and commercialized research, and appealing to prospects drawn to the opportunities presented by Kansas State University. Greater Manhattan is also able to “piggyback” on broader marketing initiatives like the KC Animal Health Corridor.

However, certain of the tools currently utilized by the Manhattan Area’s principal economic development entities can be improved to reflect today’s industry standards. This is principally true for the website of Manhattan Economic Development and, to a lesser extent, Manhattan KBED. The region would also benefit from more strategic and aggressive use of social media to promote its assets to economic development influencers.

There is also the reality that attracting attention for K-State partnership opportunities and the transformative potential of NBAF in an increasingly crowded marketplace will require greater levels of investment in external marketing and creative strategies to build the Greater Manhattan brand outside of Kansas and potentially even the United States. As with KBED, these efforts will benefit from a cohesive and collaborative partnership of the key entities pursuing quality job growth in the region in addition to exploring opportunities provided by outreach to K-State research faculty and its extensive alumni network.

CONCLUSION

As detailed in the Greater Manhattan Project Community Assessment, the three-county region's economy is overly weighted in public sector employment linked to major anchor institutions. While Kansas State University and Fort Riley are incredible assets that provide the Manhattan Area with economic dynamism, stability, infusions of talent, and other benefits, the region's dependence on these anchors has led to an economy lacking diversity of employment sectors, companies, occupations, and workforce skill sets. This reality affects Greater Manhattan's ability to attract new companies and talent and retain K-State graduates across multiple degree programs as well as transitioning military from Fort Riley and other demographic groups.

This Target Sector Analysis and Marketing Review leverages comprehensive data assessment of employment and occupational trends and projections along with analysis of Greater Manhattan's strengths and assets across multiple categories of competitiveness to identify five high-value target sectors for prioritized investment. Quantitative research was combined with extensive qualitative feedback from Manhattan Area stakeholders to paint a full picture of the region's challenges and opportunities related to improved economic and occupational diversification.

A review of Greater Manhattan's current economic development marketing efforts supplements the targeted analysis by assessing the region's capacity to promote the proposed target industry sectors to economic development influencers and prospect companies. With its current assets and the transformative potential of NBAF, the Manhattan Area would benefit from more aggressively telling its story to priority audiences in high-value markets across the country and, potentially, in key international markets.

The findings and strategic implications of the Target Sector Analysis and Marketing Review will directly inform the next report in the Greater Manhattan Project: the Community and Economic Development Strategy.