

# Town of Addison, Texas

Economic Development Strategic Plan

March 2019

# Strategic Plan

**Provided to:**

**Orlando Campos**

Director of Economic Development & Tourism

Town of Addison, Texas

5350 Belt Line Road

Addison, TX 75254

972.450.7034

[ocampos@addisontx.gov](mailto:ocampos@addisontx.gov)

# Acknowledgements

The Town of Addison and Ady Advantage would like to thank all of the individuals who have provided input throughout the strategic planning process. We would like to especially thank the city council, the city manager and the special project committee, who have served as advisors throughout this process.

- Joe Chow, Mayor
- Paul Walden, Mayor Pro Tempore
- Tom Braun, Deputy Mayor Pro Tempore
- Ivan Hughes, Council Member
- Lori Ward, Council Member
- Marlin Willesen, Council Member
- Guillermo Quintanilla, Council Member
- Wes Pierson, City Manager
- Ashley Mitchel, Deputy City Manager
- Sabina Bradbury, Special Project Committee Member
- David Chavez, Special Project Committee Member
- David Collins, Special Project Committee Member
- CJ Comu, Special Project Committee Member
- Ralph Doherty, Special Project Committee Member
- Adam Gordon, Special Project Committee Member
- Casey Hasten, Special Project Committee Member
- Ronald Holley, Special Project Committee Member
- Jeff Lackey, Special Project Committee Member
- Judy Lembke, Special Project Committee Member
- Kent Pierce, Special Project Committee Member
- Mark Sommer, Special Project Committee Member

# Table of Contents

Section 1: Introduction	5
Section 2: Regional Market Assessment	7
Section 3: Stakeholder and Employer Input	35
Section 4: Community Survey Responses	55
Section 5: Assessment of Zoning, Land Use, Infrastructure and Mobility	88
Section 6: Talent-Led Target Industry Analysis	113
Section 7: Regional Positioning	229
Section 8: Addison Vision and Goals	278
Section 9: Economic Development Framework and Strategic Plan Recommendations	290



# Section 1: Introduction

# Introduction

## BACKGROUND

The Town of Addison, Texas, located in the center of northern Dallas County, is a hub of business activity in the Dallas region. The Town draws more than 125,000 people to the startups, numerous headquarters, and major corporations located in the over 11 million square feet of office space it holds. More than 180 restaurants, 24 hotels with 4,100 rooms, and Addison Airport support the business activities conducted within the community. The Town is completely built out and focusing efforts on redevelopment.

The Town of Addison adopted a community-wide economic development strategic plan in 2010, and has since completed all of the goals they set out to accomplish, including establishment of the Economic Development & Tourism Department. The community wants to update this plan with short-, intermediate-, and long-term goals to accomplish. The process should include data collection and public input, analysis and draft completion, and recommendations and a final report.

## OBJECTIVE

The objective of this engagement is to create an economic development strategic plan to sustain the quality of the community in existence and determine what needs to be done to prepare for the future.

A faint, light-colored world map is visible in the background of the slide, centered behind the title text.

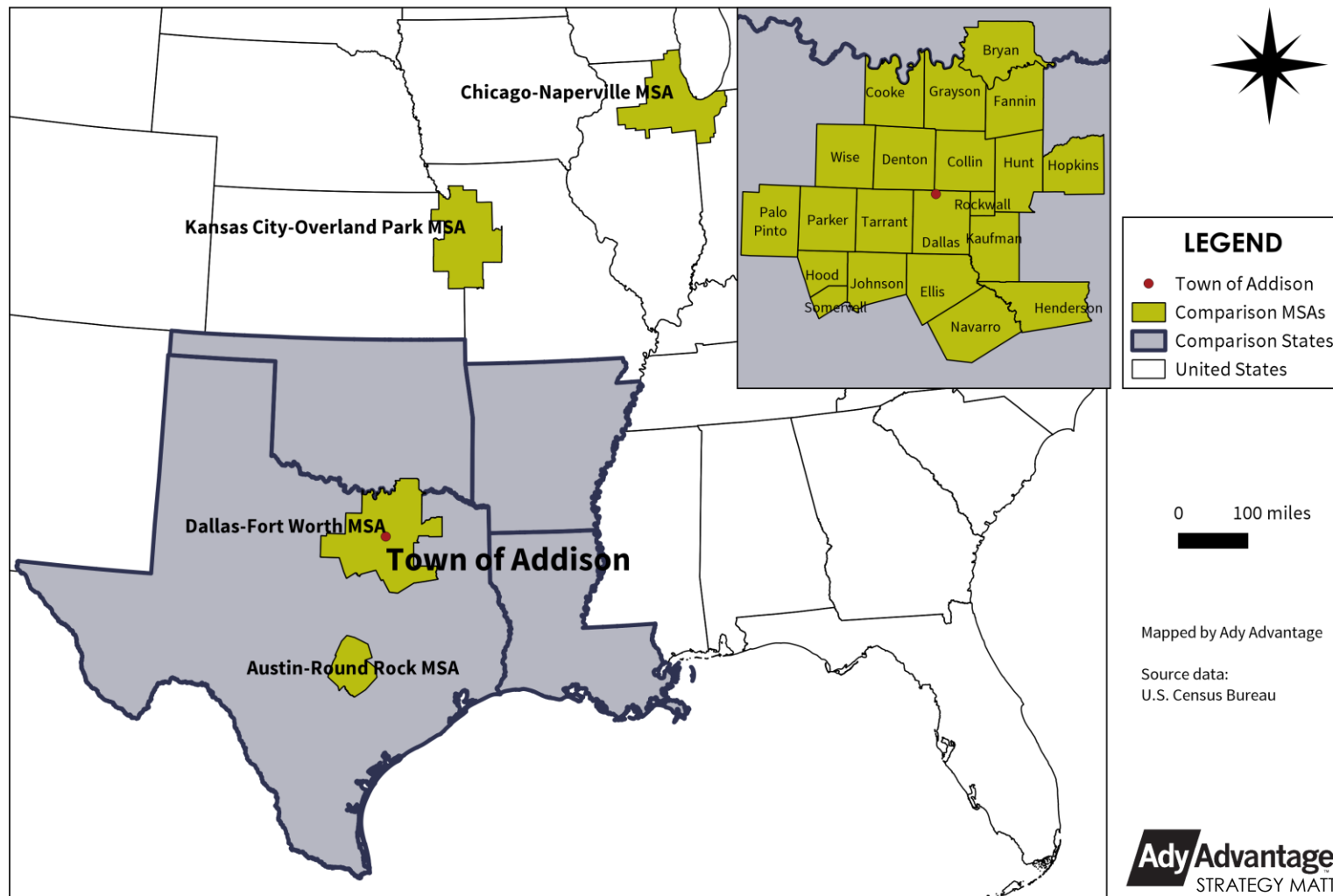
## Section 2: Regional Market Assessment

# Regional Market Assessment

## INTRODUCTION

### REGIONAL MAP

The map below depicts the Town of Addison; comparison metropolitan statistical areas (MSAs) of Dallas-Fort Worth, Kansas City-Overland Park, Chicago-Naperville and Austin-Round Rock; as well as comparison states of Texas, Oklahoma, Arkansas and Louisiana. The map inset in the upper right corner shows the counties within the Dallas-Fort Worth MSA.





# Regional Market Assessment

## DEMOGRAPHICS

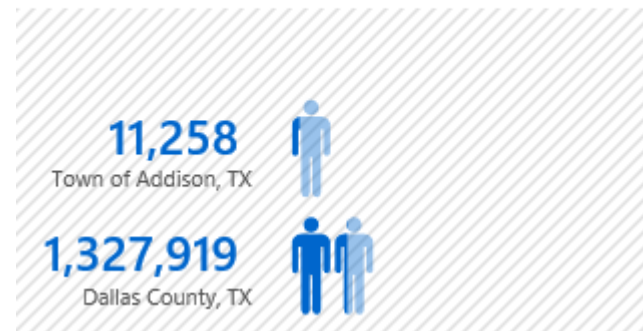
### POPULATION AND LABOR FORCE

The Town of Addison, TX, has a population over 15,000 and labor force of over 11,000 living in Addison. Of the comparison regions, Chicago-Naperville-Elgin, IL, has the largest population and workforce.

### Population



### Labor Force



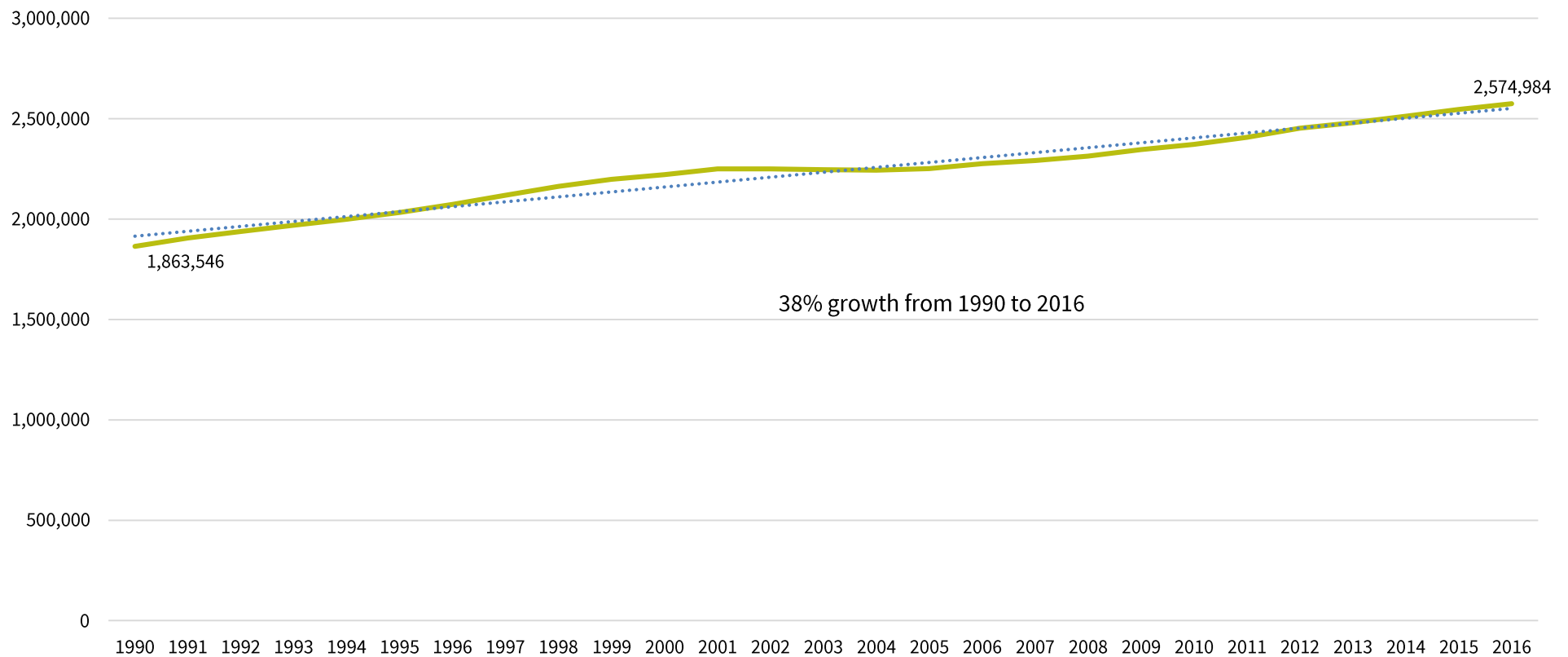
Source: U.S. Census Bureau, 2016

# Regional Market Assessment

## DEMOGRAPHICS

### REGIONAL POPULATION OVER TIME

The graph below shows the population change for Dallas County, Texas, which has experienced a steady population growth of about 24,500 people per year from 1990 to 2016. The green line denotes the actual population change on an annual basis, while the dotted blue line shows the trendline.



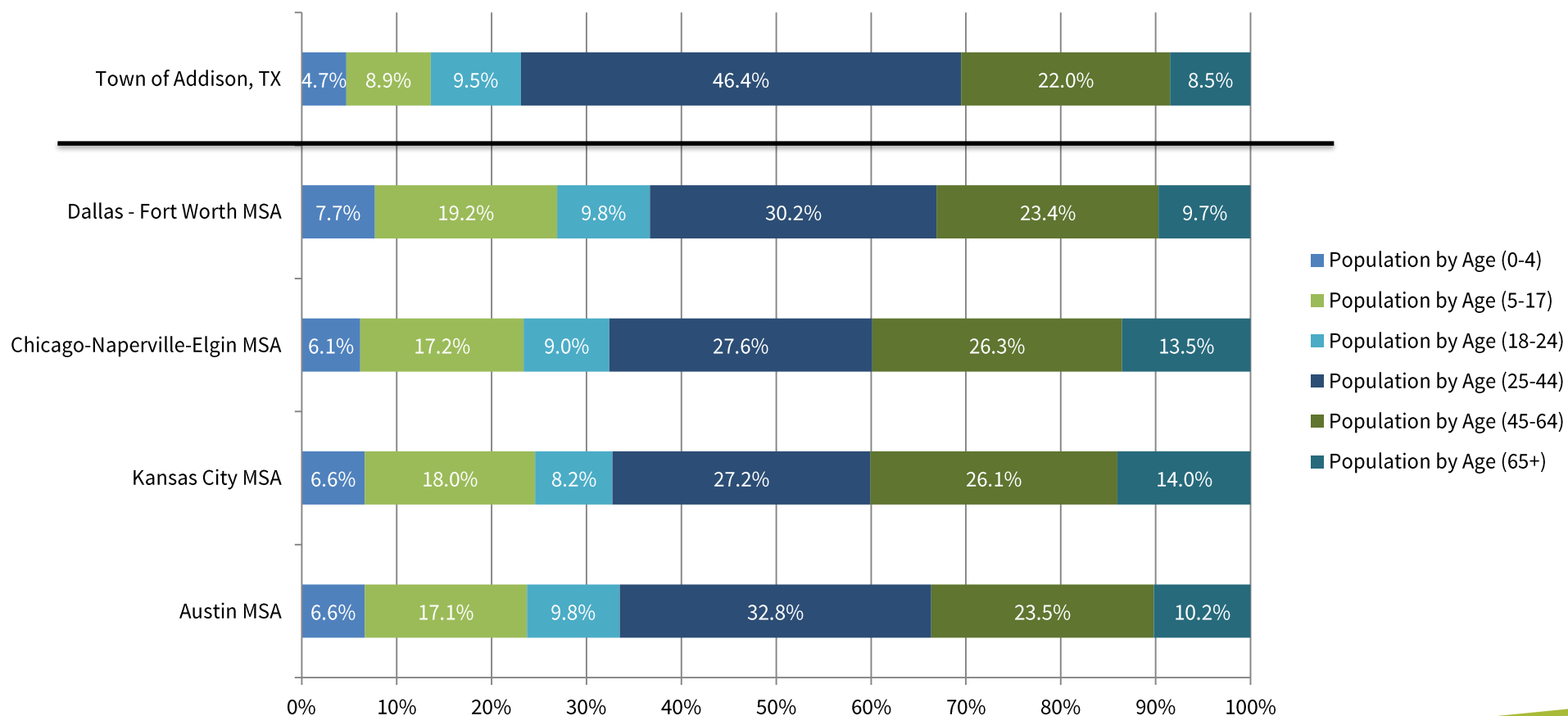
Source: U.S. Census Bureau, 2017

# Regional Market Assessment

## DEMOGRAPHICS

### POPULATION RANGE BY AGES

Most of the comparison communities have a similar spread of ages. However, the Town of Addison, TX, has a significantly higher percentage of people in the 25-44 age range.



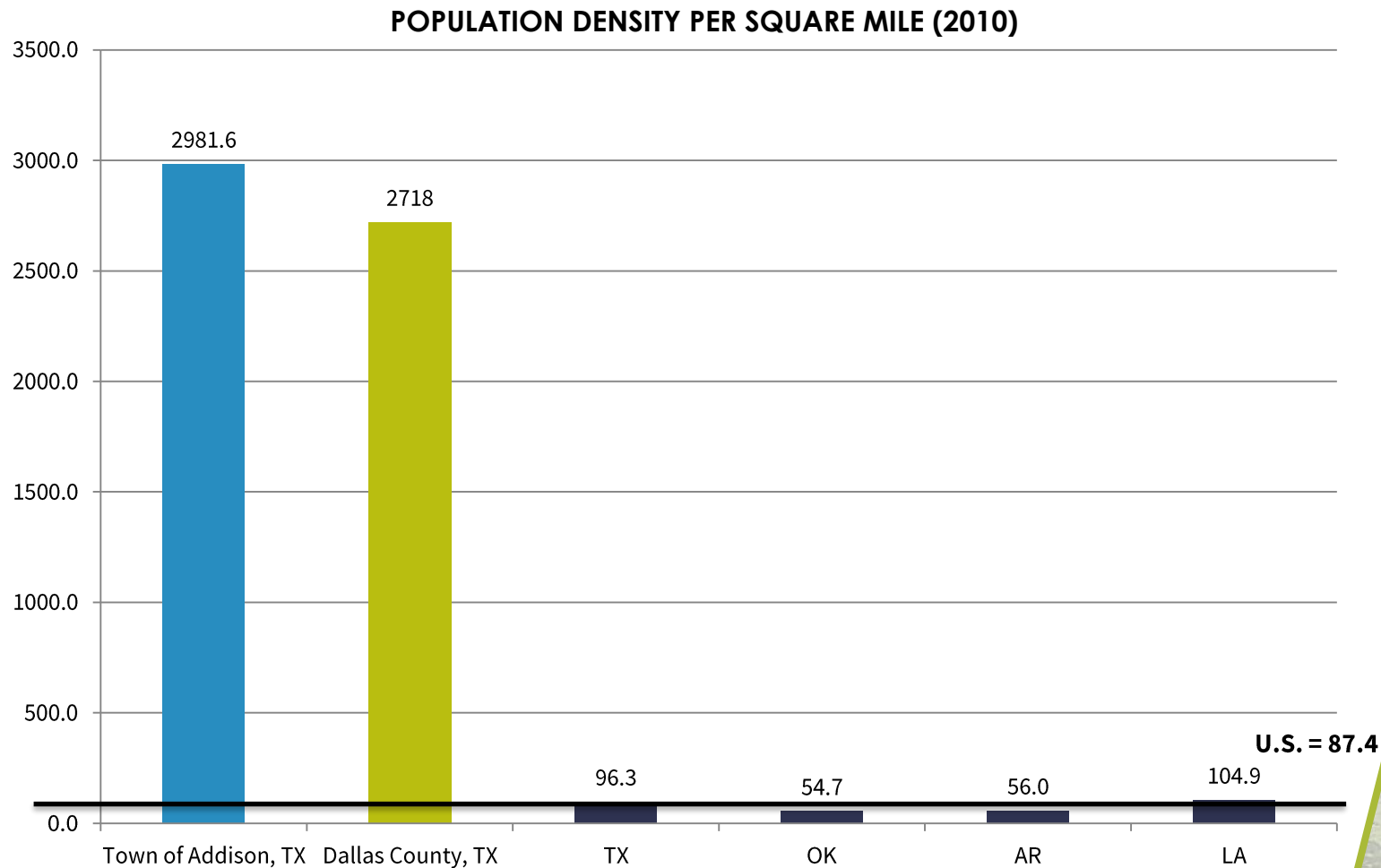
Source: U.S. Census Bureau, 2015

# Regional Market Assessment

## DEMOGRAPHICS

### POPULATION DENSITY PER SQUARE MILE

The Town of Addison and Dallas County, TX, are well above the national and state averages in terms of population density.



Source: U.S. Census Bureau, 2010



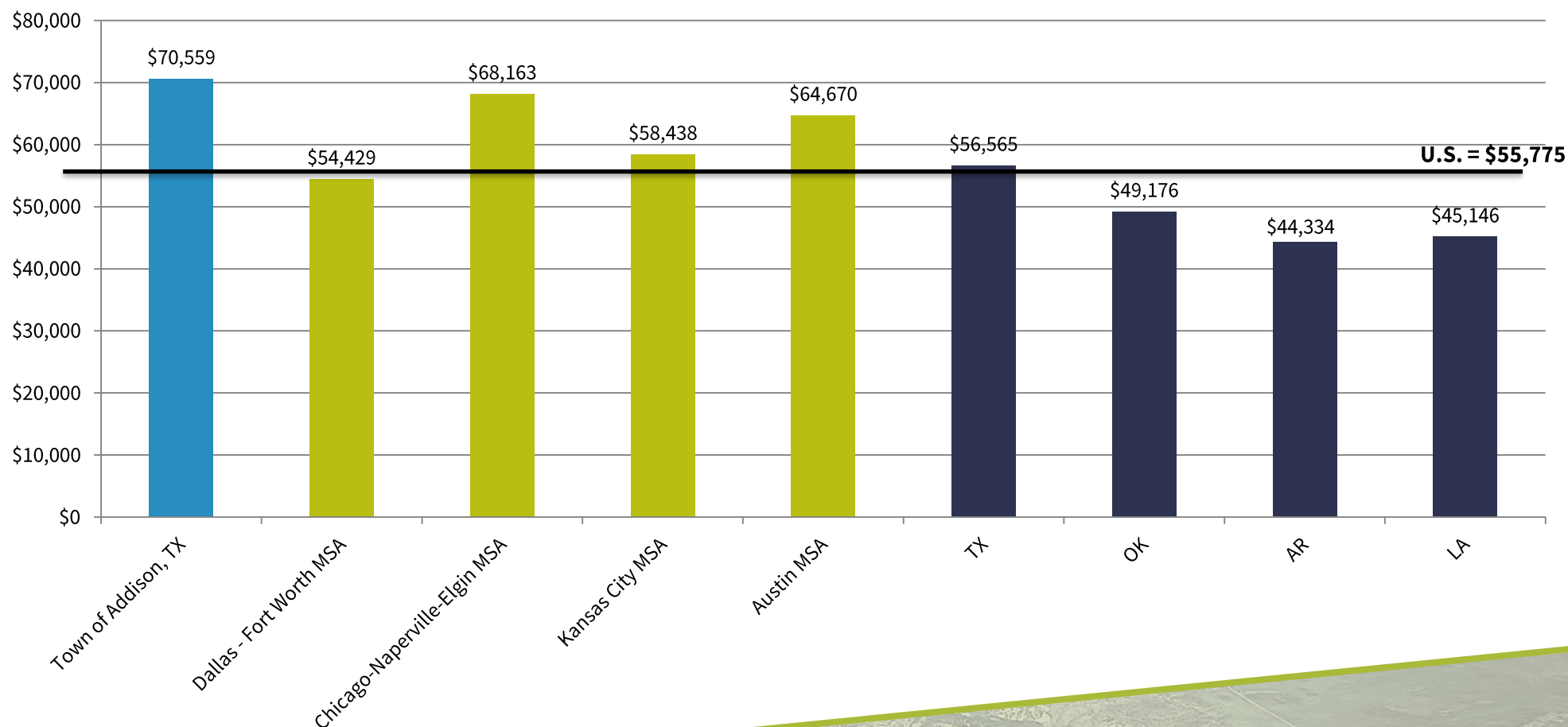
# Regional Market Assessment

## ECONOMICS

### MEDIAN HOUSEHOLD INCOME

Median household income across the comparison communities is, in most cases, slightly higher than the state and national averages. Comparison states of Oklahoma, Arkansas and Louisiana have lower median household income averages than the national average.

#### MEDIAN HOUSEHOLD INCOME



Source: U.S. Census Bureau, 2015

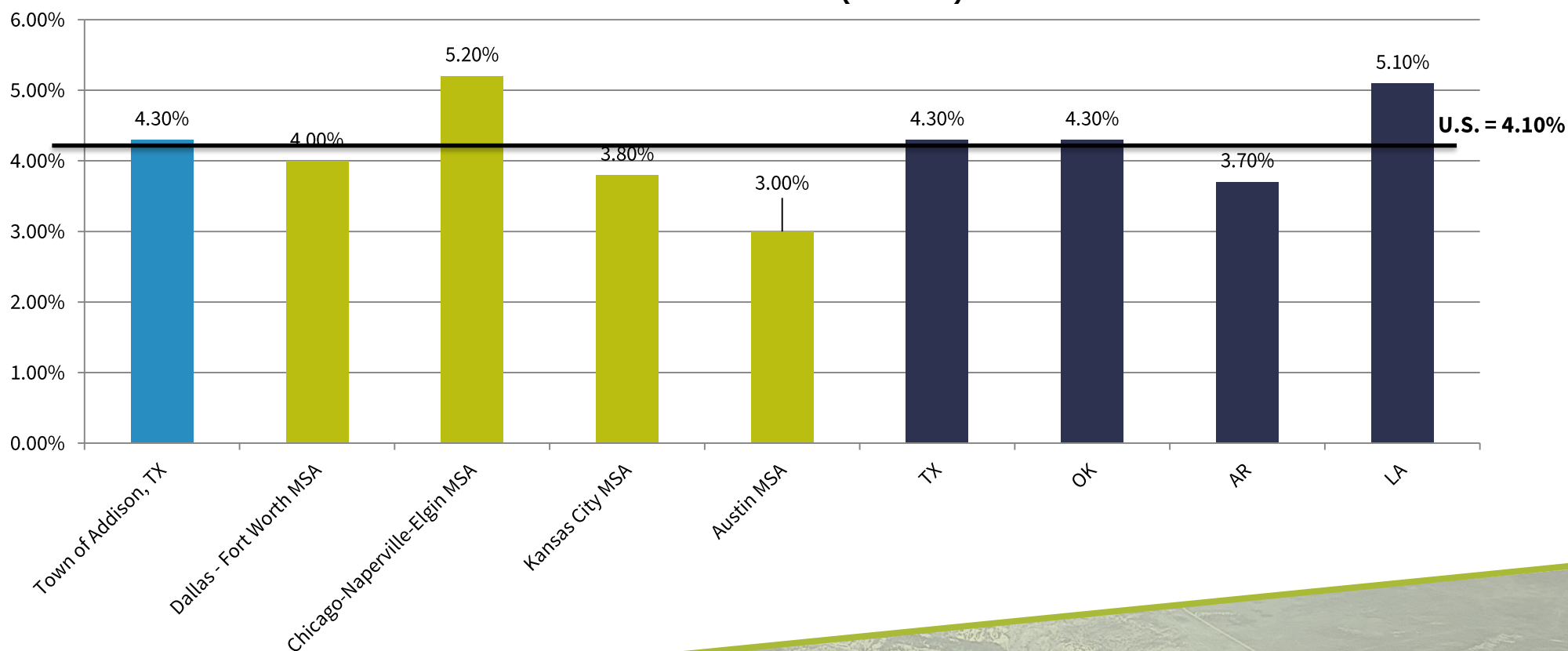
# Regional Market Assessment

## ECONOMICS

### UNEMPLOYMENT RATE (FEB 2018)

Unemployment rate can be an indicator of the available workforce in a given region. Those regions with extremely low unemployment rates will likely hear that their employers are having a hard time finding good, quality workers. Most of the comparison communities have unemployment rates around the national average of 4.1%. The lowest unemployment rates are in Kansas City and Austin MSAs.

UNEMPLOYMENT RATE (FEB 2018)



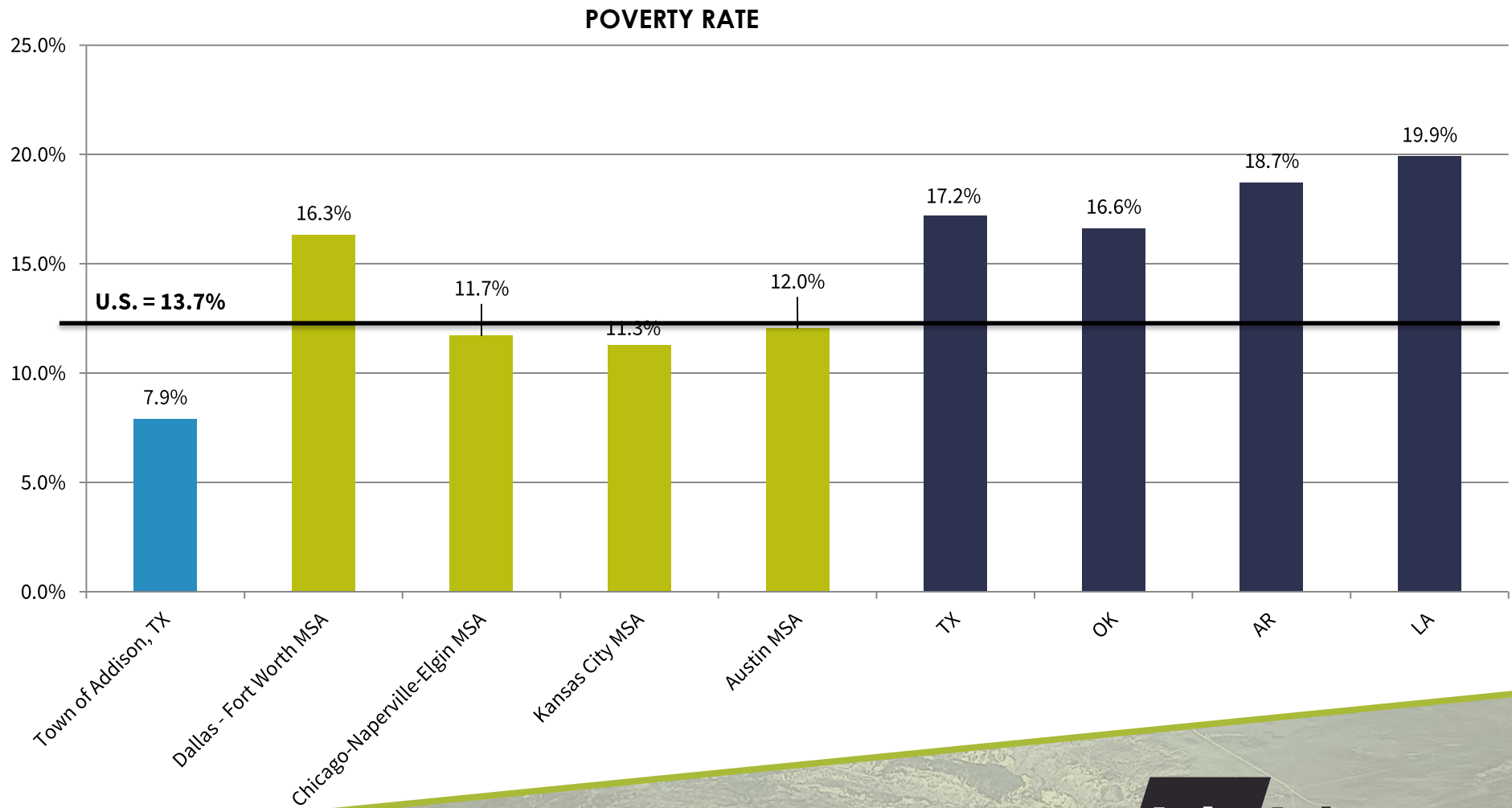
Source: U.S. Census Bureau, 2018

# Regional Market Assessment

## ECONOMICS

### POVERTY RATE

Most of the communities chosen for comparison have lower poverty rates than the US or state of Texas averages. Town of Addison has the lowest poverty rate of all communities and states compared. The rates range from 7.9 to 19.9%.



Source: U.S. Census Bureau

# Regional Market Assessment

## ECONOMICS

### INCOME INEQUALITY

Income inequality between rich and poor residents (on a scale from 0 to 1) was generally higher across comparison regions than the national average, with Addison having the greatest income inequality of all comparison regions.

#### INCOME INEQUALITY INDEX



Source: AARP Livability Index, 2018



# Regional Market Assessment

## ECONOMICS

### TAX RANKINGS – 2018 STATE BUSINESS TAX CLIMATE

The table below shows the various tax rates and tax rankings for Texas and surrounding states. Green highlighting indicates the best ranking amongst the comparison states.

	TEXAS	OKLAHOMA	ARKANSAS	LOUISIANA
Top Individual Income Tax Rate	0%	5.00%	6.90%	6.00%
Top Corporate Income Tax Rate	0%*	6.00%	6.50%	8.00%
State Sales Tax Rate	6.25%	4.50%	6.50%	5.00%
Overall Tax Rank (out of 50)	13	32	39	42
Corporate Tax Rank (out of 50)	49	9	39	40
Individual Income Tax Rank (out of 50)	6	38	30	27
Sales Tax Rank (out of 50)	37	36	44	50
Unemployment Insurance Tax Rank (out of 50)	26	1	32	4
Property Tax Rank (out of 50)	37	15	22	30

Source: Tax Foundation, 2018

\*Businesses pay a margin tax based on revenues and expenses, not income.

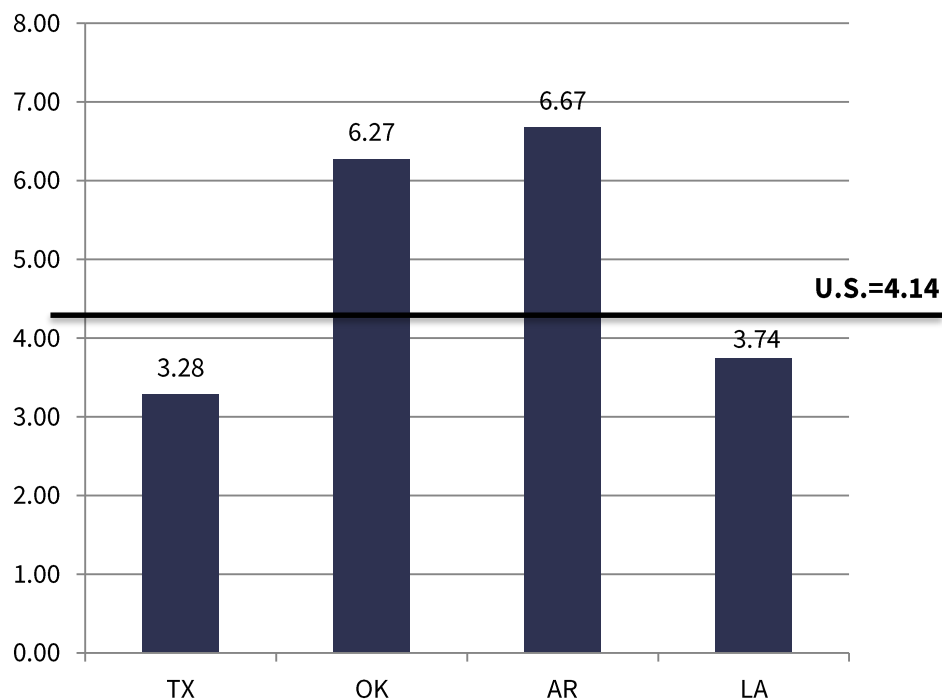
# Regional Market Assessment

## ECONOMICS

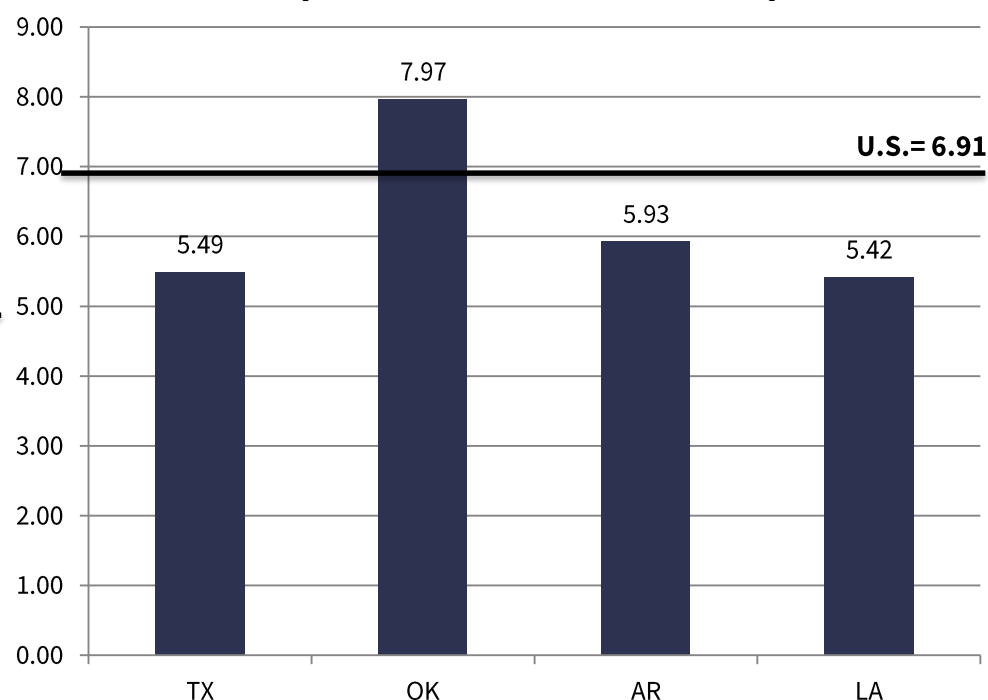
### ELECTRIC AND GAS COSTS

Texas' gas and electricity costs are lower than the US average. In comparison with neighboring states, Texas' gas costs are generally lower, and electricity costs are generally about the same or lower.

**AVERAGE INDUSTRIAL GAS COSTS  
(IN DOLLARS PER THOUSAND CUBIC FEET)**



**AVERAGE INDUSTRIAL ELECTRIC COSTS  
(IN CENTS PER KILOWATT-HOUR)**



Source: EIA.gov, Annual 2017

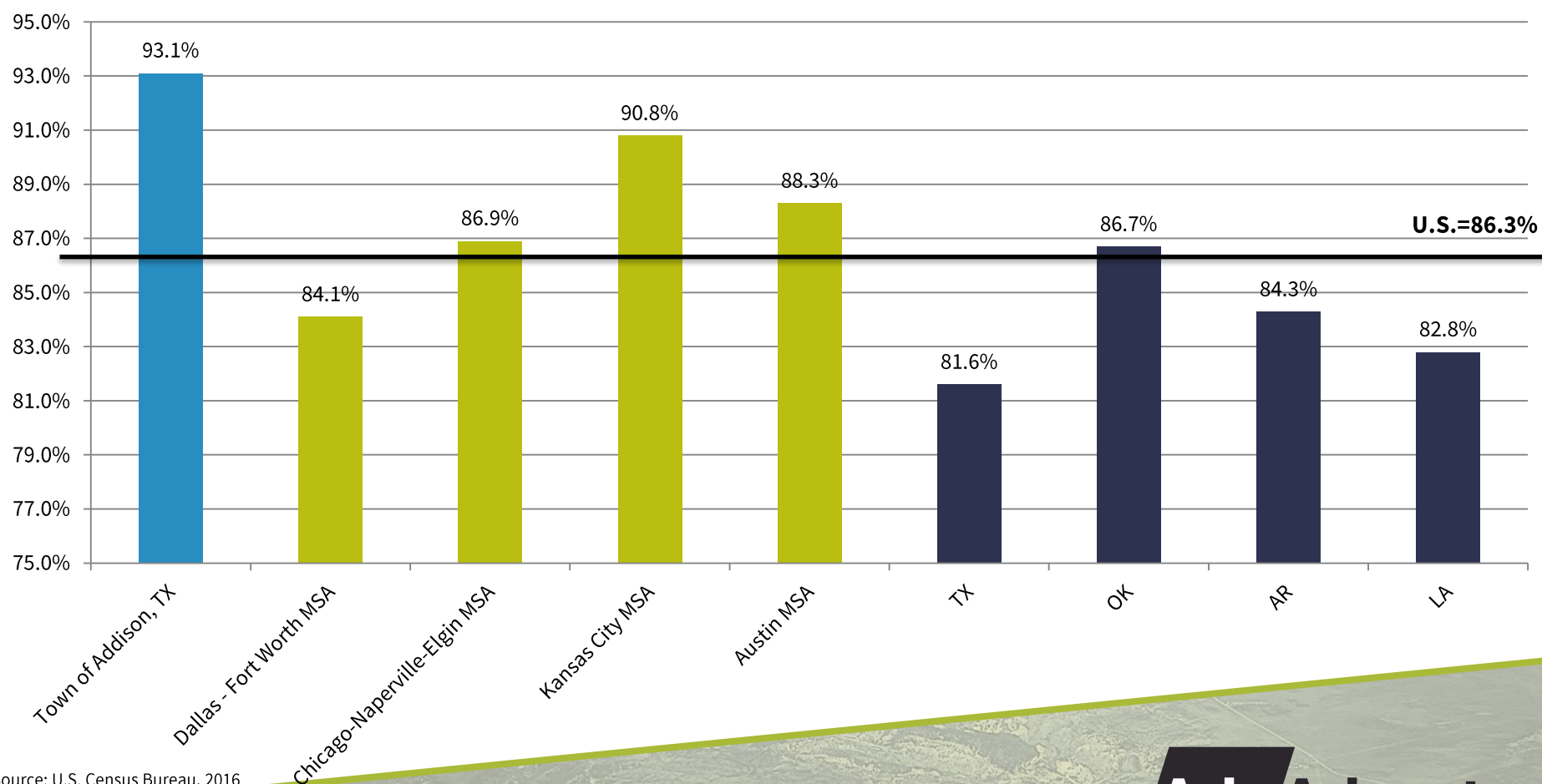
# Regional Market Assessment

## EDUCATION

### EDUCATIONAL ATTAINMENT

The following pages show educational attainment levels of individuals greater than 25 years of age within the region and compared to Texas and surrounding states. Most of the communities compared have high school education attainment rates above the national average. The Town of Addison has high school attainment rates above Dallas-Fort Worth MSA, the state of Texas, and the national average.

#### EDUCATIONAL ATTAINMENT: HIGH SCHOOL



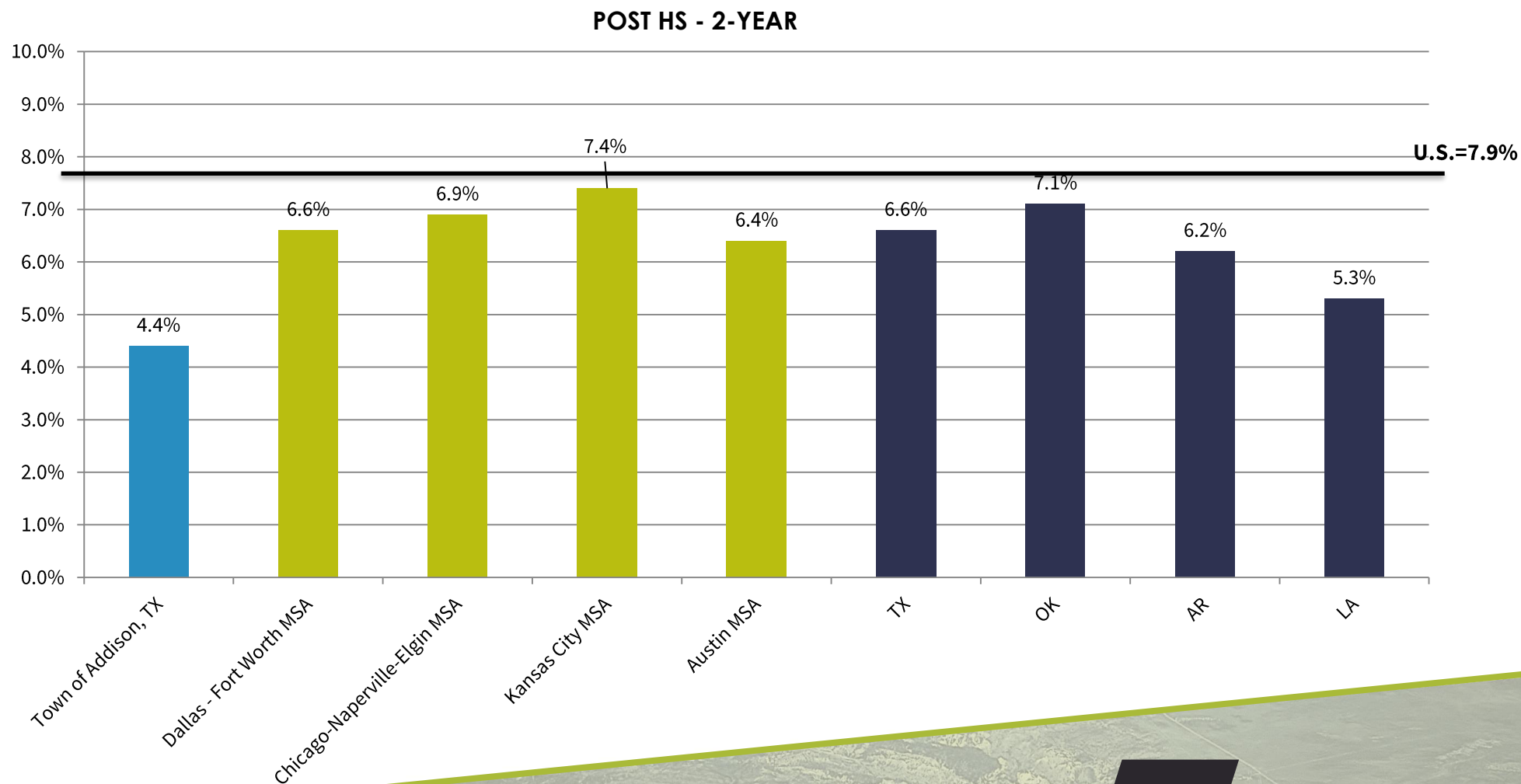
Source: U.S. Census Bureau, 2016

# Regional Market Assessment

## EDUCATION

### EDUCATIONAL ATTAINMENT

All of the communities in the comparison have post high school two-year educational attainment rates below the national average.



Source: U.S. Census Bureau, 2016



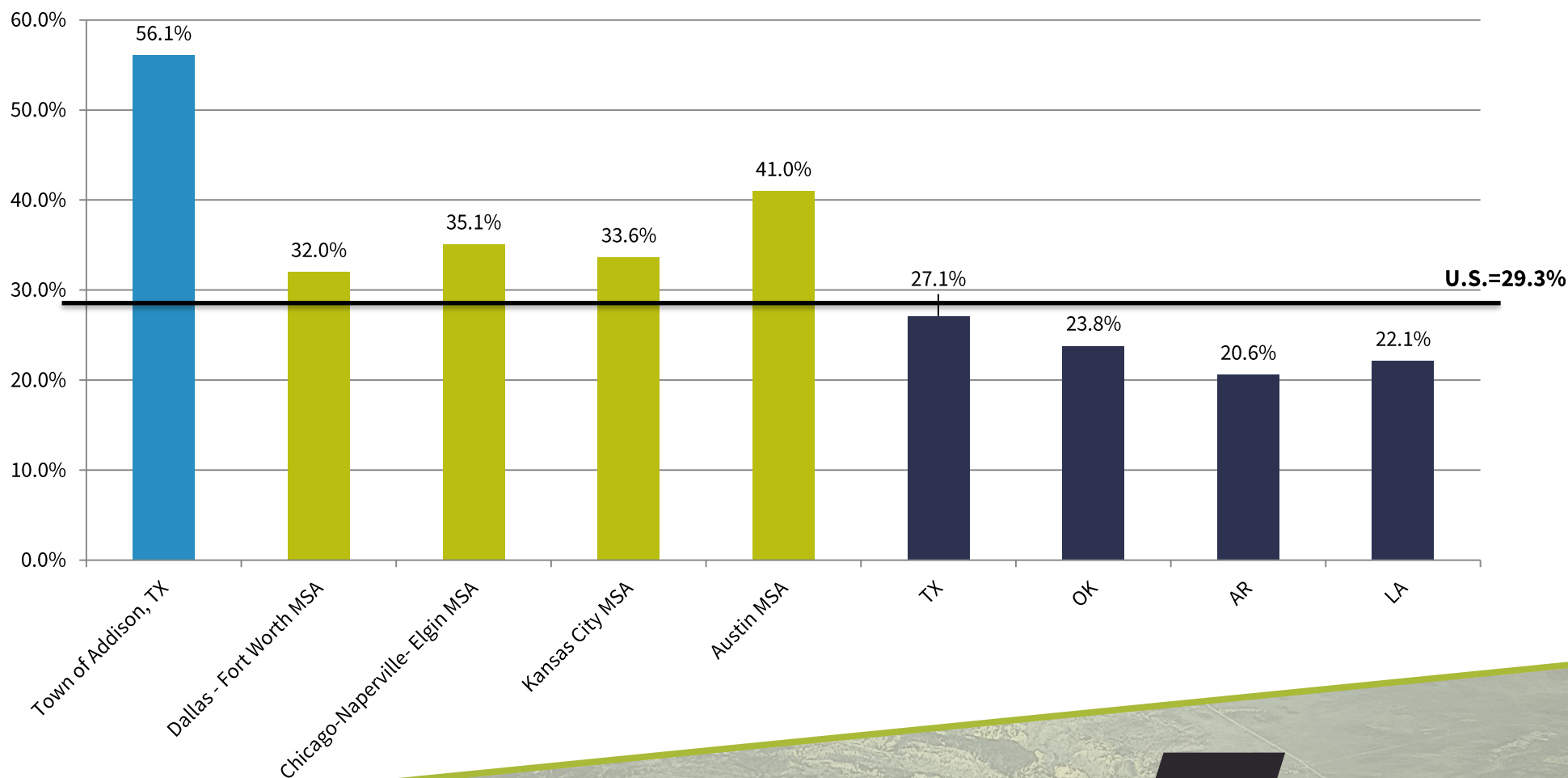
# Regional Market Assessment

## EDUCATION

### EDUCATIONAL ATTAINMENT

Four-year educational attainment is high amongst the comparison communities, with all being above the state of Texas and the national averages. The Town of Addison has the highest educational attainment amongst comparison communities, and is in the top 6% of communities on a national level.

#### POST HS - 4-YEAR



Source: U.S. Census Bureau, 2016

# Regional Market Assessment

## EDUCATION

### EDUCATIONAL ATTAINMENT

Most of the comparison communities have graduate school educational attainment rates above the national average, with the exception of Dallas-Fort Worth MSA. Texas and neighboring states also have graduate school attainment rates below the national average.

#### POST HS - GRAD SCHOOL



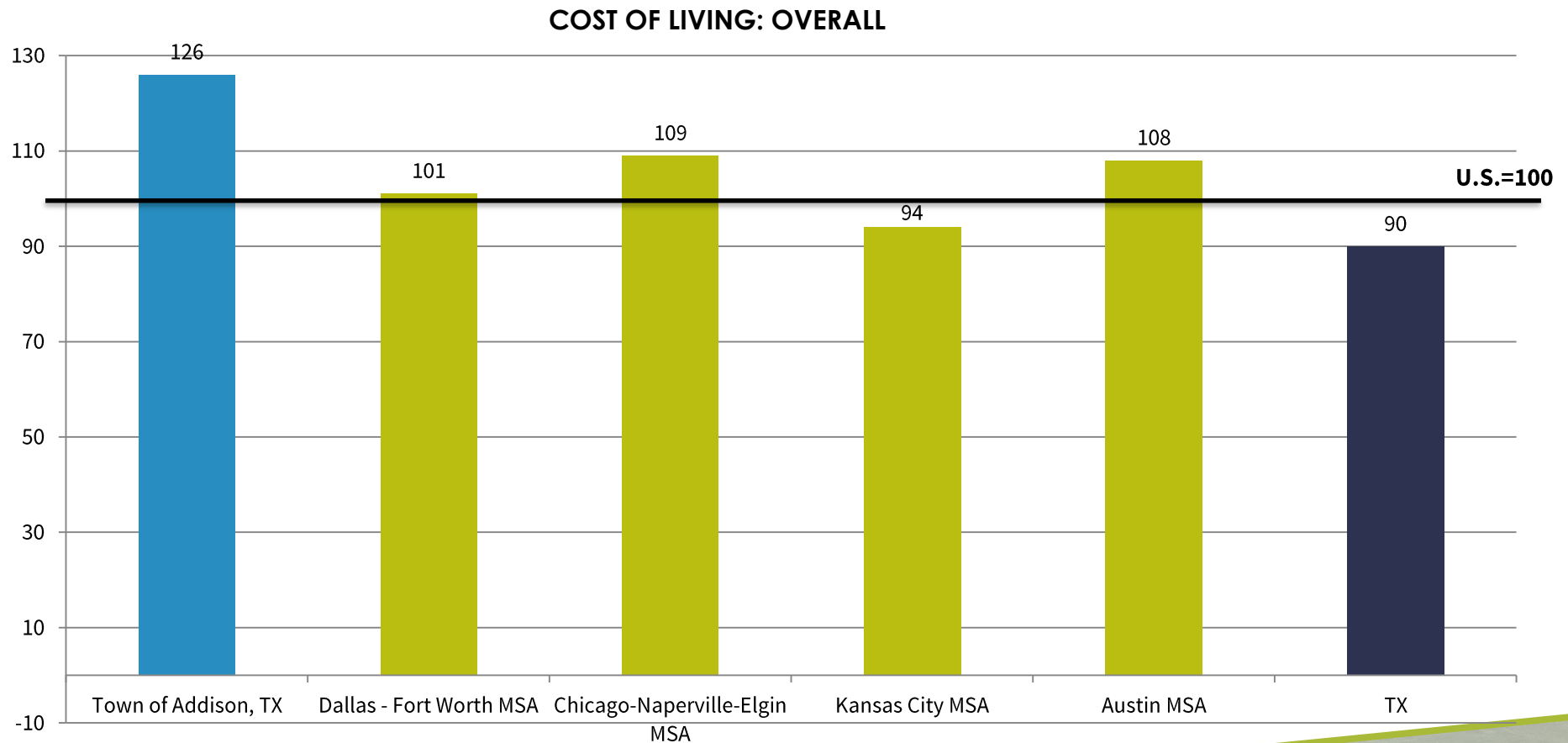
Source: U.S. Census Bureau, 2016

# Regional Market Assessment

## QUALITY OF LIFE

### COST OF LIVING

The data below shows the cost of living index in each community. The US average is 100, so the data below shows that the cost of living in most of the communities is above the US average. The range is 10% below to 26% above the US average cost of living.



Source: Sperling's Best Places, 2016

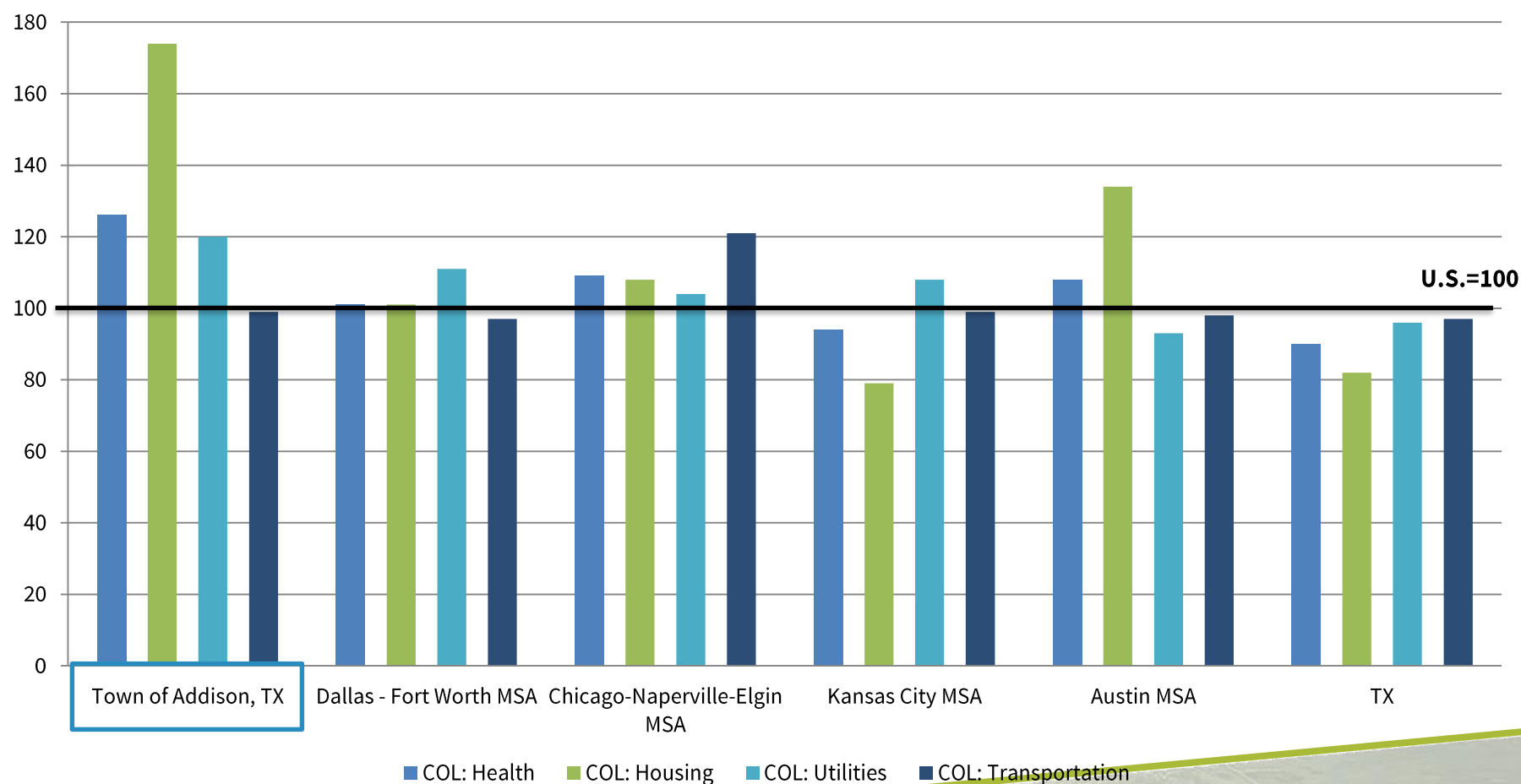
# Regional Market Assessment

## QUALITY OF LIFE

### COST OF LIVING

The table below looks at the individual costs that make up a region's cost of living. Many of the comparison regions have costs above the US average. Housing costs are mixed among comparison communities, but tend to be the highest costs in some communities. The cost of housing, which is Addison's greatest cost, includes mortgage payments, rents, and property taxes.

**COST OF LIVING FACTORS**



Source: Sperling's Best Places, 2016

# Regional Market Assessment

## QUALITY OF LIFE

### MEDIAN HOME VALUE

Median home values amongst comparison MSAs are generally more than the national average, as well as the Texas average (\$151,800). Median home values amongst Texas and neighboring states are lower than the national average. The highest median home values can be found in the Town of Addison (\$323,600).

### MEDIAN HOME VALUE

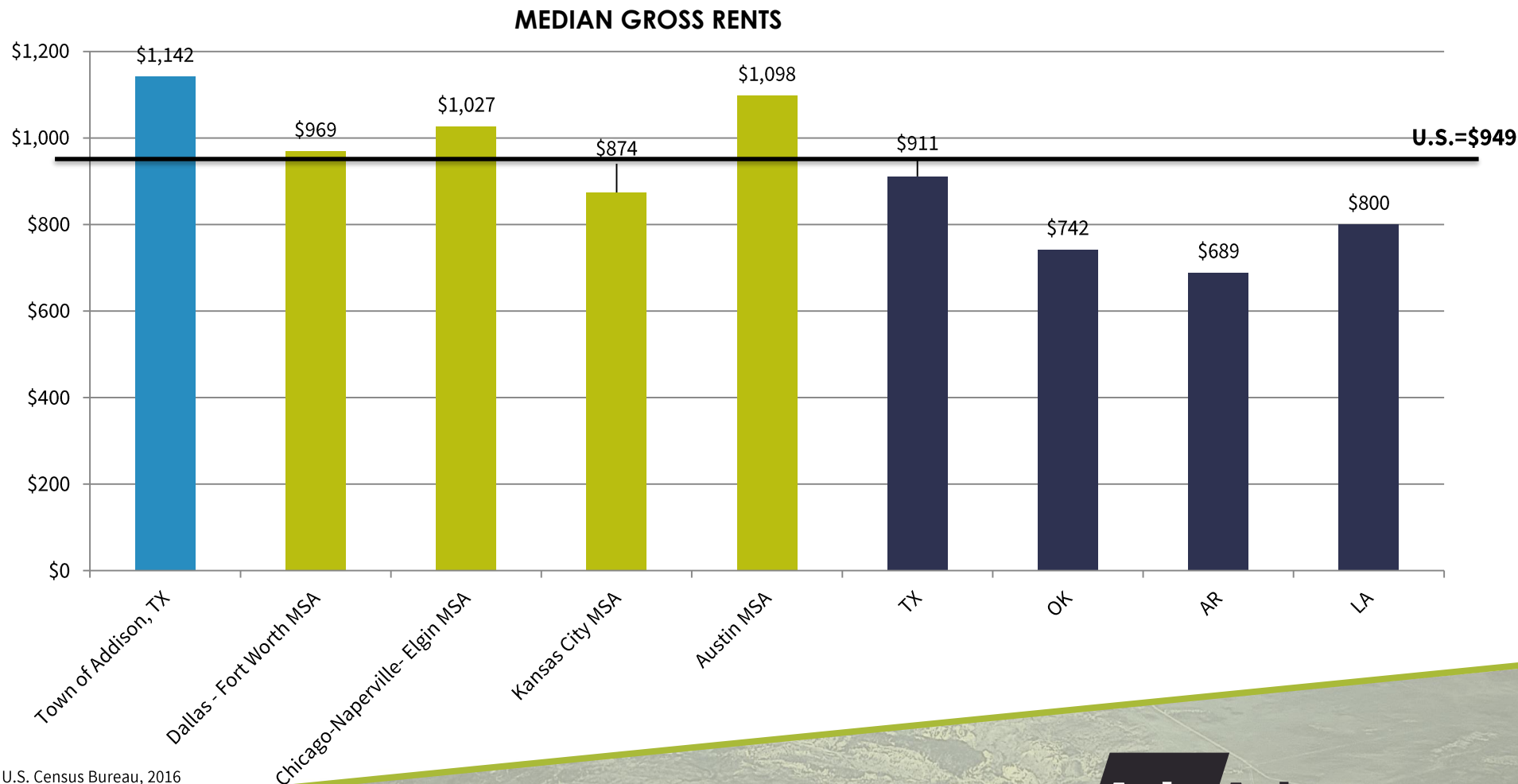


# Regional Market Assessment

## QUALITY OF LIFE

### MEDIAN GROSS RENTS

Median gross rents amongst comparison MSAs are generally more than the national average, as well as the Texas average (\$911). Median gross rents amongst Texas and neighboring states are lower than the national average. The highest median gross rents can be found in the Town of Addison (\$1,142), where 70% of the community's population rents (Sperling's Best Places, 2018).



Source: U.S. Census Bureau, 2016

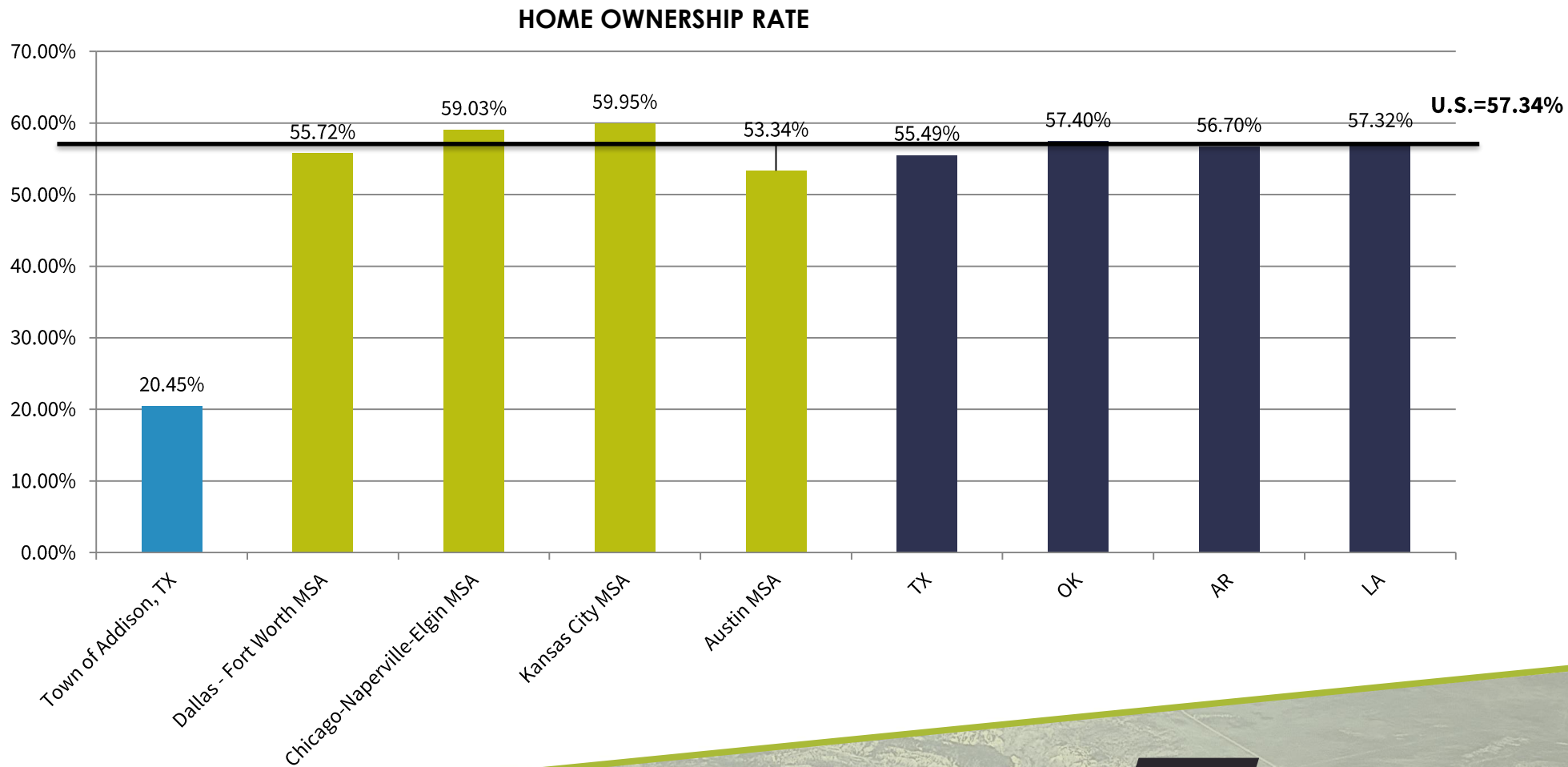


# Regional Market Assessment

## QUALITY OF LIFE

### HOME OWNERSHIP RATE

Home ownership rates are generally around the national average for comparison regions, but significantly lower in the Town of Addison, which has the lowest rate (20.45%)



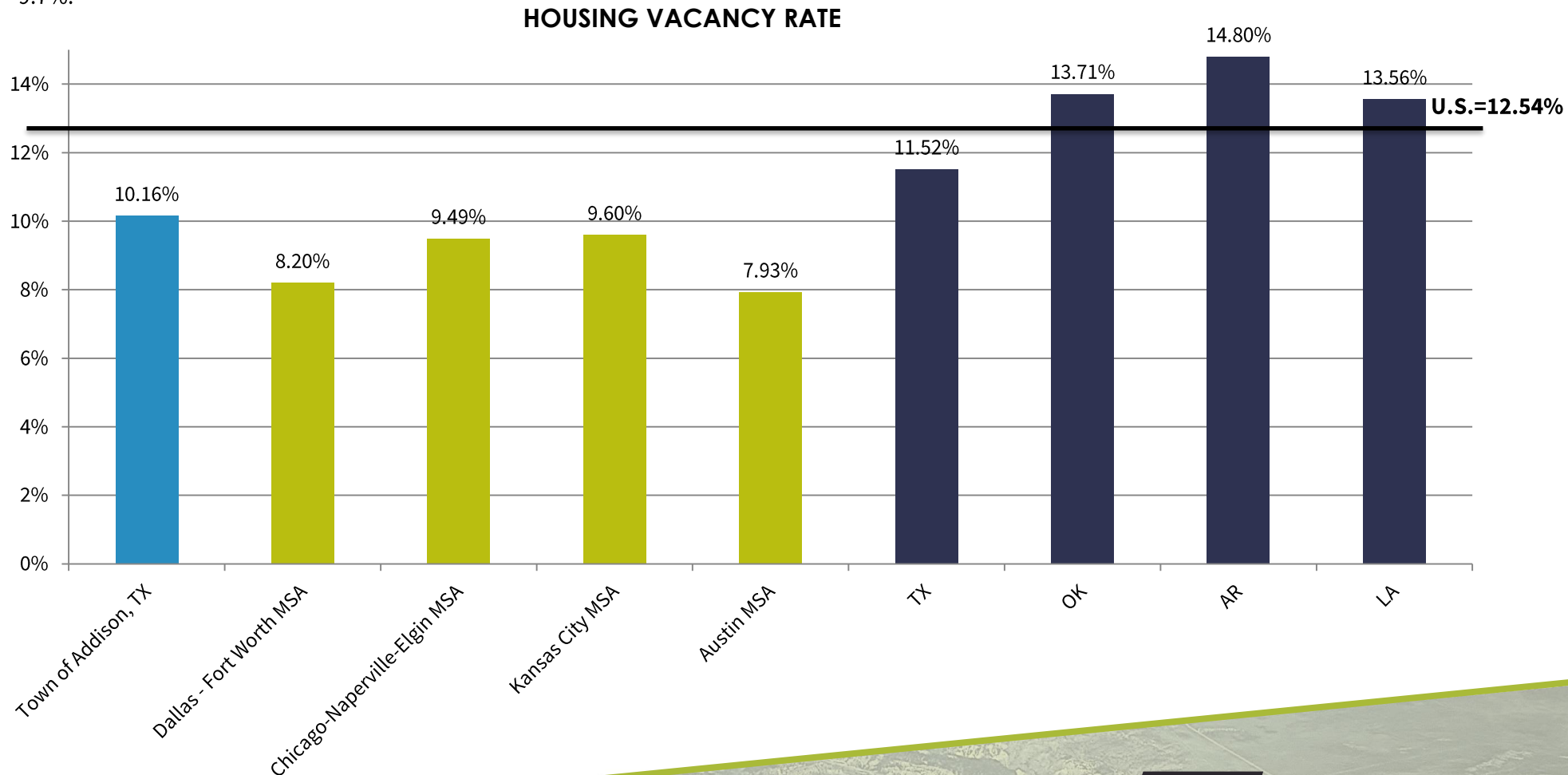
Source: Sperling's Best Places, 2016

# Regional Market Assessment

## QUALITY OF LIFE

### HOUSING VACANCY RATE

Most of the comparison MSAs have housing vacancy rates lower than the national average, while Texas' neighboring states have rates above the national average. The US Census Bureau 2012-2016 estimates of homeowner vacancy rate in Addison was 1.8%, while the rental vacancy rate was 9.7%.



Source: Sperling's Best Places, 2016

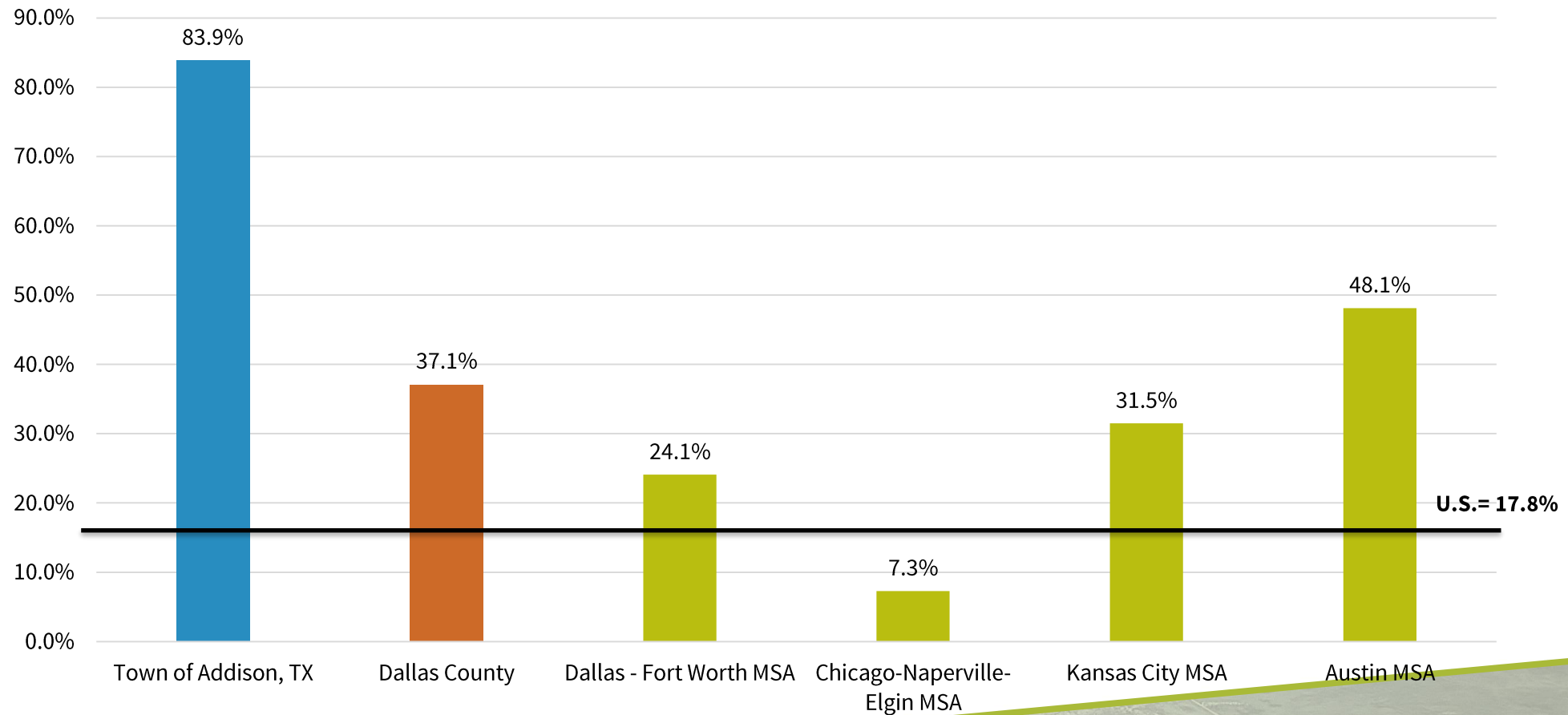
# Regional Market Assessment

## QUALITY OF LIFE

### MULTI-FAMILY HOUSING

Most of the comparison MSAs have rates of multi-family housing available greater than the national average, while rates in Addison are highest among all comparison regions.

#### AVAILABILITY OF MULTI-FAMILY HOUSING



Source: AARP Livability Index, 2018

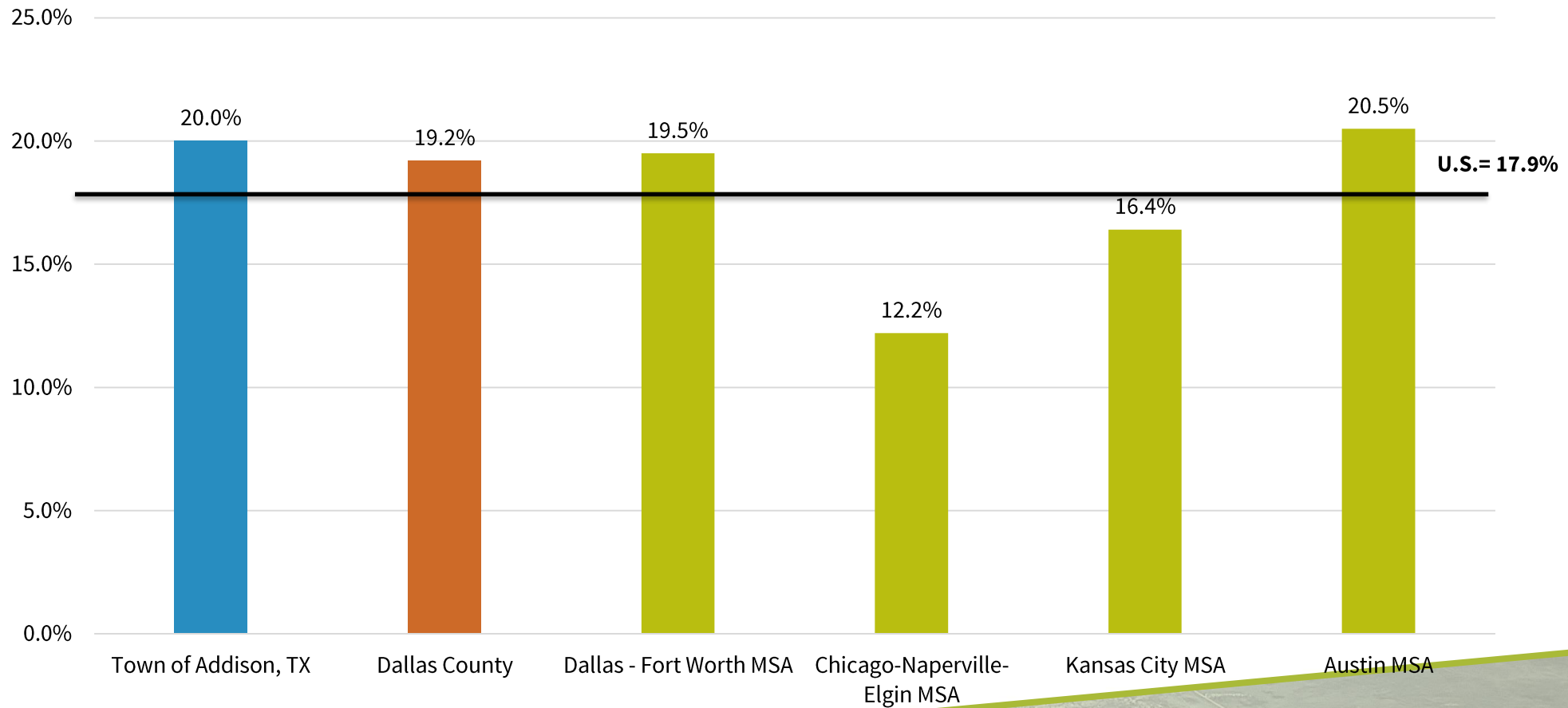
# Regional Market Assessment

## QUALITY OF LIFE

### HOUSING COST BURDEN

The percentage of income devoted to housing was similar across most comparison regions, with most being slightly higher than the national average.

**PERCENTAGE OF INCOME SPENT ON HOUSING**



Source: AARP Livability Index, 2018

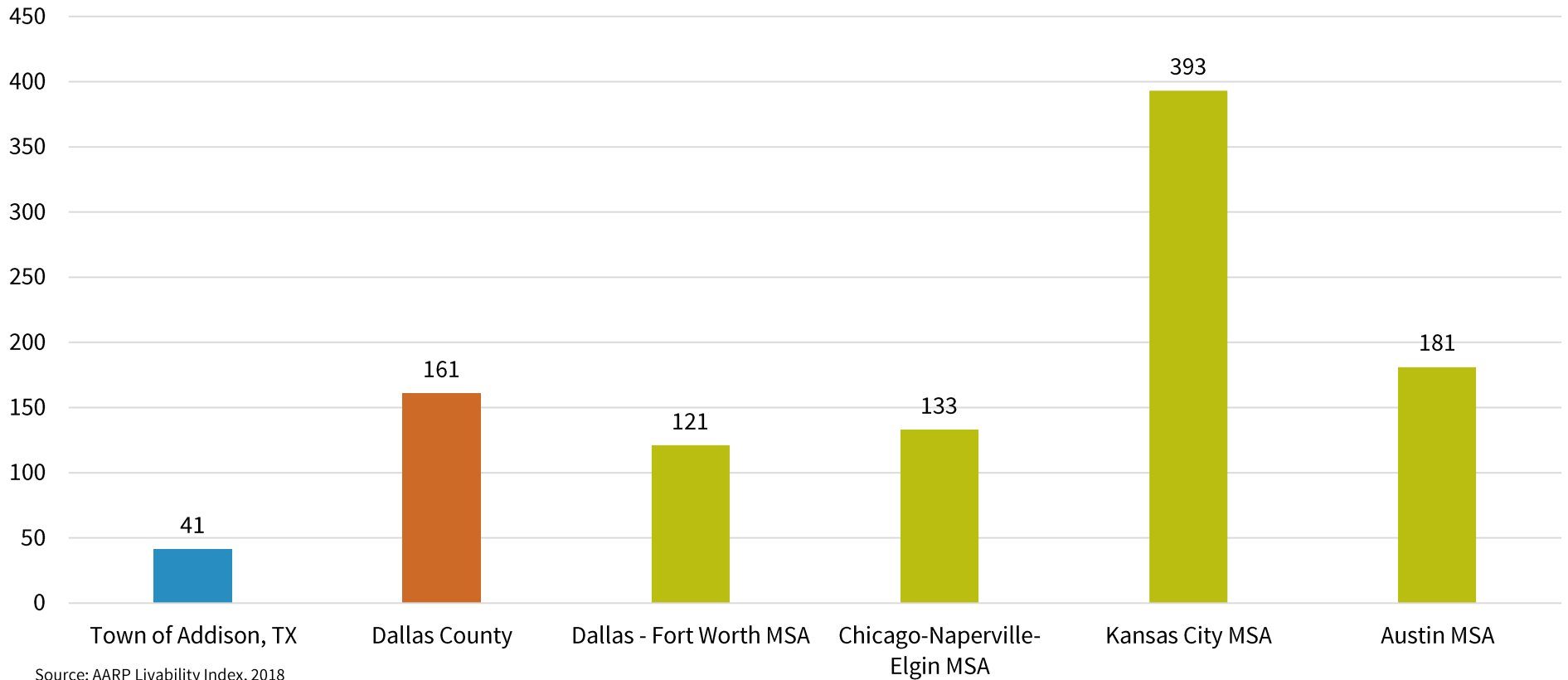
# Regional Market Assessment

## QUALITY OF LIFE

### SUBSIDIZED HOUSING

The number of subsidized housing units in Addison was smaller than all comparison regions, with Kansas City MSA having the highest.

**SUBSIDIZED HOUSING UNITS PER 10,000 PEOPLE**

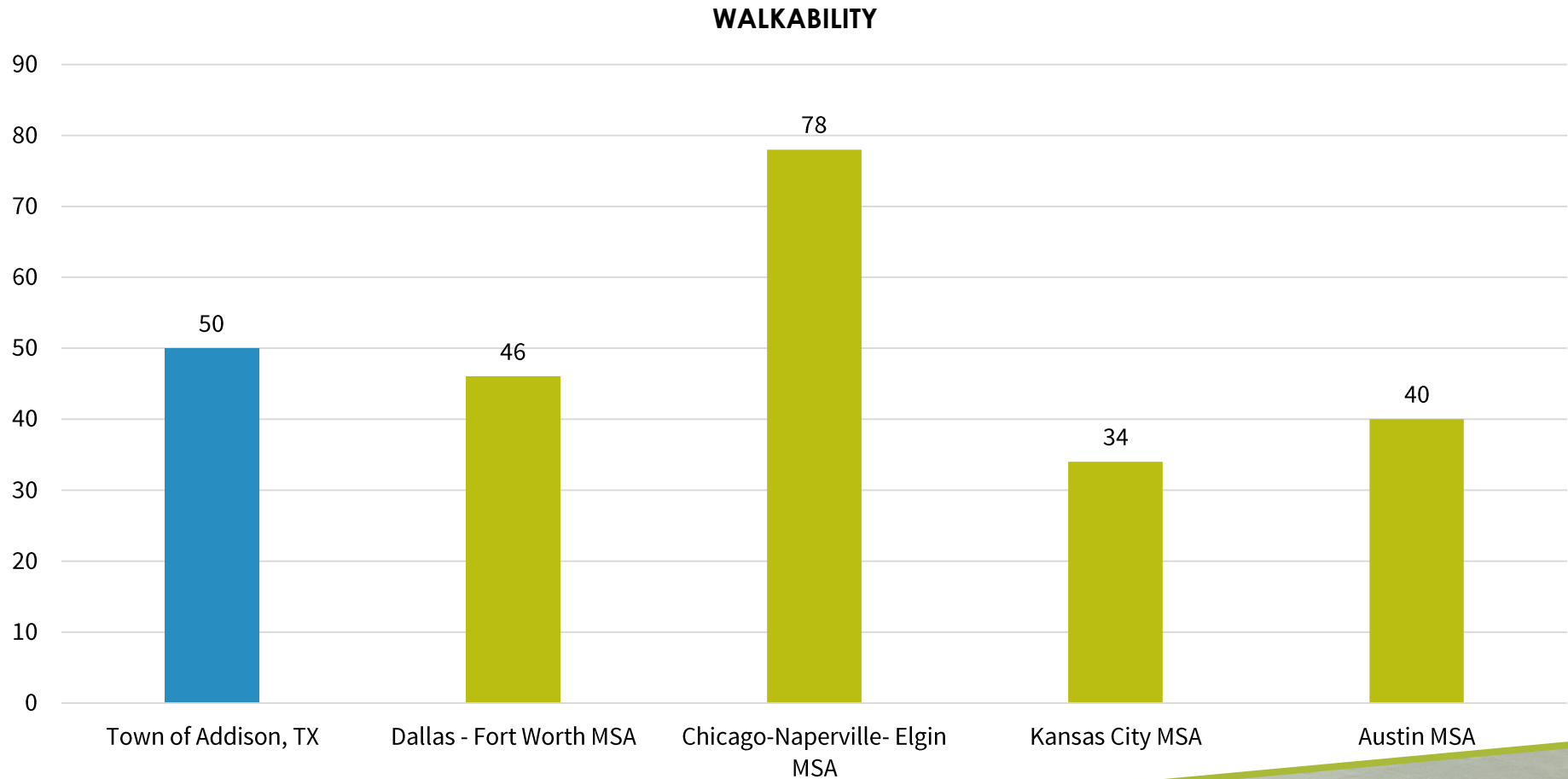


# Regional Market Assessment

## QUALITY OF LIFE

### WALKABILITY

Walk scores in Addison indicate the area is somewhat walkable, meaning some trips can be accomplished on foot. Chicago MSA had the highest walk score among comparison regions, with 78 out of 100.



Source: Walk Score, 2018



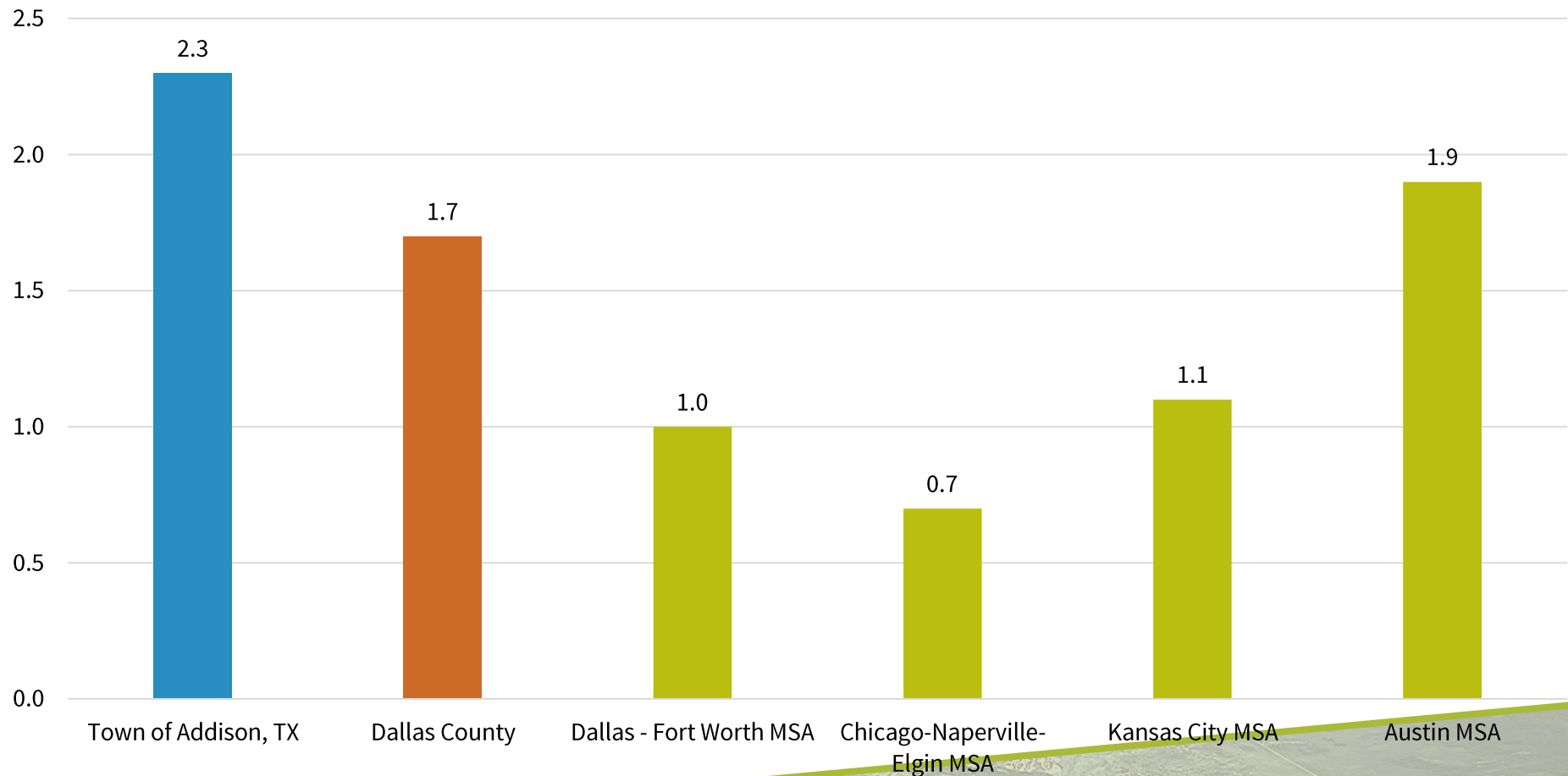
# Regional Market Assessment

## QUALITY OF LIFE

### ACCESS TO GROCERY STORES AND FARMERS' MARKETS

Access to grocery stores and farmers' markets within a half-mile area in Addison is higher than comparison regions, at 2.3.

#### GROCERY STORES AND FARMERS' MARKETS WITHIN A HALF-MILE



Source: AARP Livability Index, 2018

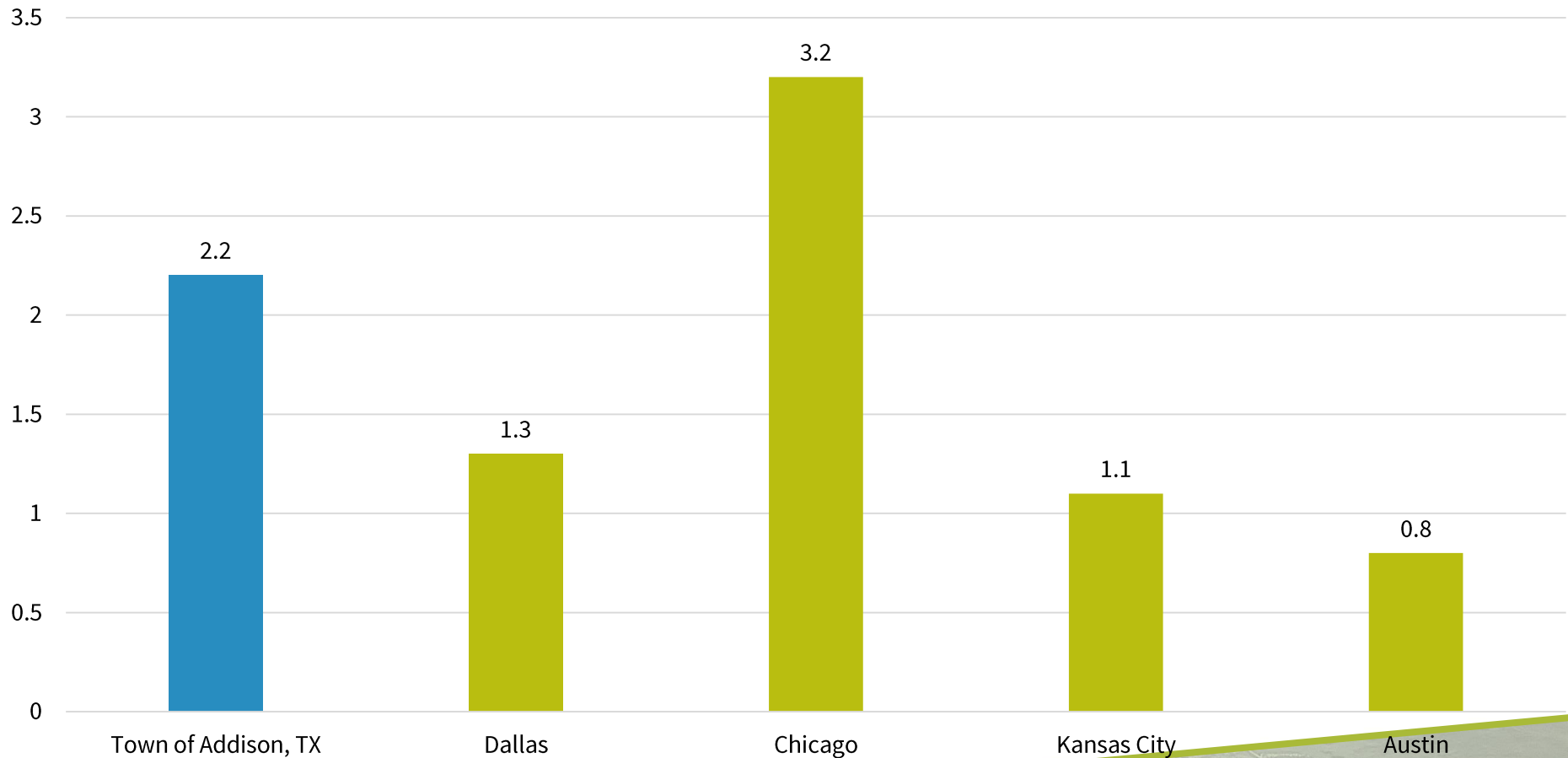
# Regional Market Assessment

## QUALITY OF LIFE

### ACCESS TO PARKS

Access to parks within a half-mile area in Addison is relatively high, at 2.2, with Chicago having the highest.

#### PARKS WITHIN A HALF-MILE



Source: AARP Livability Index, 2018

## Section 3: Stakeholder and Employer Input and Analysis

# Stakeholder and Employer Input and Analysis

## Interview Attendees

The Ady Advantage team conducted confidential interviews of the following eight individuals from seven companies in the Town of Addison that represent and impact the region's economy. Participants were very forth coming and willing to participate in these interviews, which were conducted during our on-site visit to the Town of Addison from May 22-24, 2018. Responses from these interviews were combined with focus group responses for the same questions and reported on within this section. Interview responses from employers and hospitality industry representatives can be found in the Appendix.

NAME	TITLE	ORGANIZATION
HOSPITALITY INDUSTRY		
Richard Chamberlain	Owner	Chamberlain's Steakhouse
Kenny Bowers	Owner	Kenny's Italian Kitchen & Kenny's Wood Fired Grill
Kris Brown Felisha Wishaw	General Manager DOS	Marriott Hotel
EMPLOYERS		
John Dankovchik	CEO	Splash Media
Steve Roemerman	CEO	Lone Star Analysis
Larry Mondry	CEO	Stream Energy
Heather Young	Hospital Liaison	Methodist Hospital

# Stakeholder and Employer Input and Analysis

## Interview Attendees

The Ady Advantage team conducted confidential interviews with various stakeholders across Addison and the region. Responses from these interviews were combined with Interview responses from stakeholders can be found in the Appendix.

NAME	TITLE	ORGANIZATION
STAKEHOLDERS		
Trey Bowles	Co-Founder	Dallas Innovation Alliance
Tracy Eubanks	CEO	Metrocrest Services
Katherine Wheeler	Chair	Planning & Zoning, Town of Addison
Charles Goff	Assistant Director	
Joe Chow	Mayor	Town of Addison
Wes Pierson	City Manager	
Paul Walden	Councilman	
Lori Ward	Councilperson	
Tom Braun	Councilman	
Guillermo Quintanilla	Councilman	
Ivan Hughes	Councilman	
Marlin Willesen	Councilman	

# Stakeholder and Employer Input and Analysis

## Focus Group Attendees

Focus groups were conducted with real estate, entrepreneur, multi-family development, young professional, Chamber of Commerce, education, and aviation representatives in the Town of Addison during our on-site visit from May 22-24, 2018. Responses from these focus groups were combined with interview responses for the same questions and reported on within this section. Individual focus group responses can be found in the Appendix.

NAME	ORGANIZATION
<b>REAL ESTATE</b>	
Doug Hanna	Sunwest Real Estate
Saadia Shiekh	ESRP
Van Power	NAI Robert Lynn
<b>TREEHOUSE/ENTREPRENEURS</b>	
Tahir Hussain	Collide Village
Mark Langford	SBDC
Buddy Barnes	Earth Water
Brenda Stoner	Pickup Now
<b>MULTI-FAMILY DEVELOPMENTS</b>	
Stacey Griggs	Post Properties
Ryan Gill	15777 Quorum
Jack Wensinger	Willmax Capital
John Kidwell	Willmax Capital
Jessica Zazzara	UDR
Josh Bosler	InTown Homes

NAME
METROCREST CHAMBER YOUNG PROFESSIONALS
Brennan LaPorte
Linda Blackburn
Logan Bellamy
Jessica Key Bynum
John Smith
CHAMBER OF COMMERCE
Mary Ann Burns
TJ Gilmore
Jim Weichel
Jan Rugg



# Stakeholder and Employer Input and Analysis

## Focus Group Attendees

NAME	TITLE	ORGANIZATION
EDUCATION		
Adrienne Ewert	Counselor	George H. W. Bush Elementary
Thom Chesney	President	Brookhaven College
Dave Delph	Headmaster	Trinity Christian Academy
Tom Perryman	Assistant Head of Schools	Greenhill School
Dr. Georgeann Warnock	Assistant Superintendent	CFBSD

ORGANIZATION
AVIATION
AQRD
Million Air
Plane Smart
Metroplex Inspections
Mission Companies
Martinaire Cargo
Ameristar
American Flyers

# Stakeholder and Employer Input and Analysis

## SUMMARY OF ON-SITE VISIT INTERVIEWS AND FOCUS GROUPS

BUSINESS COSTS AND CONDITIONS	
STRENGTHS	CHALLENGES
<ul style="list-style-type: none"> <li>Historically has been considered business friendly, progressive, entrepreneurial, collaborative, modern, fast-paced, innovative, aggressive</li> <li>Central location and access               <ul style="list-style-type: none"> <li>Very central to the north Dallas growth corridor (located strategically between Uptown/Downtown and Plano)</li> <li>Can pull talent from all directions with easy commute, including direct Tollway access and east-west connectivity along Belt Line Road</li> <li>Great highway access for white collar and tech professionals for work and play</li> <li>20 minutes to DFW and Love airport</li> <li>New DART stop could be a good commute option for lower salaried or family oriented workers who cannot or choose not to live in Addison</li> </ul> </li> <li>Addison home to a key Dallas-region GAA Airport               <ul style="list-style-type: none"> <li>a preferred airport for corporate planes and users</li> <li>Very well located for Dallas area businesses with good access to most of the region</li> <li>Pilots often overnight in Addison – prefer it</li> </ul> </li> <li>Opportunity for companies to tout live-work-play for their employees</li> <li>Low occupancy costs in Addison</li> <li>Safety</li> <li>Range of housing options to appeal to different workforce sectors, demographics and income levels including single family communities (primarily within adjacent or nearby communities) and multifamily</li> </ul>	<ul style="list-style-type: none"> <li>Growth given the government restrictions               <ul style="list-style-type: none"> <li>Zoning</li> <li>Permitting</li> </ul> </li> <li>The Town is pretty much built out               <ul style="list-style-type: none"> <li>Very few open site options</li> <li>What's left is generally small</li> </ul> </li> <li>Traffic for employees (although traffic counts have actually decreased from their peak in the 1990's)</li> <li>Infrastructure challenges, including aging infrastructure and a lack of non-auto oriented transportation infrastructure to support mobility options such as walking, biking or emerging micro mobility options</li> <li>Lack of connectivity from centers of commerce (i.e. along the Toll Road) to potential destinations (i.e. Addison Circle, Belt Line Road and its restaurants)</li> </ul>

# Stakeholder and Employer Input and Analysis

## SUMMARY OF ON-SITE VISIT INTERVIEWS AND FOCUS GROUPS

LIVING CONDITIONS	
STRENGTHS	CHALLENGES
<ul style="list-style-type: none"> <li>• Has a reputation as progressive, fun, innovative, vibrant, clean, modern, well-maintained, friendly and safe</li> <li>• Restaurant row has always been the place for a drink and dinner. Village on the Parkway a good success and well- liked               <ul style="list-style-type: none"> <li>○ New movie theater and Whole Foods</li> </ul> </li> <li>• Well known for its 3 large Festivals               <ul style="list-style-type: none"> <li>○ Kaboom Town, Oktoberfest, Taste Addison</li> </ul> </li> <li>• Upscale educational assets at private K-12 and community college</li> <li>• Single family home neighborhoods are upscale, nicely maintained, clean, and safe</li> <li>• Cotton Belt DART rail line will have a stop in the southwest corner of Addison Circle</li> <li>• Provides a concentration of high quality multifamily and/or rental opportunities not generally found elsewhere in the region</li> </ul>	<ul style="list-style-type: none"> <li>• Very few employees and company owners live in Addison</li> <li>• Lack of sense of place, with the exception of Addison Circle and the emerging Vitruvian area. While Belt Line Road. provides a range of shopping and restaurant options, it is heavily designed for the automobile, at the expense of both the pedestrian experience and quality of place – two increasingly important factors in retail, restaurant and hospitality</li> <li>• High cost of living</li> <li>• Not a diverse housing area               <ul style="list-style-type: none"> <li>○ Not very family friendly when it comes to housing and schools</li> <li>○ Not enough multifamily options</li> <li>○ What is built is very expensive and not affordable for the young or lower salaried employee</li> </ul> </li> <li>• Lack of public school options</li> <li>• Limited shopping options in town</li> <li>• Restaurants – lack of new, unique restaurants</li> <li>• Has not really added new events or recreation in years</li> <li>• Lack of local and/or smaller scale, recurring events and activation</li> <li>• Built for cars, not walking or other forms of transportation</li> <li>• Various business, entertainment and residential places are not connected for walking or biking or other transit               <ul style="list-style-type: none"> <li>○ Walkways not lit in enough areas</li> <li>○ Few sidewalks in between</li> <li>○ Not connected with activities or options – clustered instead</li> </ul> </li> </ul>



# Stakeholder and Employer Input and Analysis

## ALL RESPONDENTS

### HOW HAS THE TOWN OF ADDISON EVOLVED IN THE LAST DECADE?

*Sentiment among respondents was mixed. Some noted the positive growth and changes taking place in Addison in the last ten years, namely the increase in diversity, attempts to improve quality of life and economic development growth strategies. However, there were some respondents that felt the Town has been stagnant or seen the growth and changes as negative (such as strict zoning, being passed over by competition from other cities, and lacking innovation in development). Some of the responses from each perspective are listed below:*

#### **Stagnant or unchanging**

- Has been at status quo – not negative, but other cities have caught up
- As population aged, has been more resistant to change and/or new development
- Can't stay same and keep quality we used to

#### **Positive growth and changes**

- More diverse, modern, urban, corporate, dense, millennials
- Lots of construction again, with cleaner, new buildings (Whole Foods, AMC Theater, etc.)
- More focus on class A office space and marketing of that space
- “A place where you’d want to live, unlike in the past”, with more apartments, residential (Uptown, Vitruvian), and multi-family developments
- It’s gotten more sophisticated about its growth strategy and formalized economic development
- Focus on quality of life
- Historically, lots of restaurants. Known as restaurant row
- It seems to have woken up. It has a catchier look, more energy, and it’s starting to tell its own story. Like getting DART connected.

#### **Negative growth and changes**

- May actually have devolved – used to be progressive. No more Addison Way, but rather being overly strict on rules that are not applied evenly and counter promises or approvals given in the past.
- Lack of innovation or desire to work within the market (i.e., want office everywhere, even if it makes no sense, and will not budge on zoning)
- Loss of revenue from liquor sales and haven’t banned smoking anywhere here. Need to reinvent ourselves again.
- It has been trying to keep up with current changes. Passed over by legacy and living off its successes
- Become much harder place to do business – and now its becoming a negative impact on our reputation
- Internal Addison buildings are old and tired, faded from revival of village
- Real evolution was in the ‘90s when Addison Circle was developed
- Aging infrastructure



# Stakeholder and Employer Input and Analysis

## ALL RESPONDENTS

### HOW DOES THE TOWN OF ADDISON FIT WITHIN THE CONTEXT OF THE GREATER DALLAS-FT. WORTH AREA? WHAT IS ITS UNIQUE IDENTITY?

*The restaurants, airport and other local assets and amenities were noted as contributing to the unique identity of the Town of Addison as a great place to live. The responses are listed below:*

#### **Things To Do**

- Upscale, known for restaurants and living
- The hub for restaurants and food, bars and night life
- Lots of amenities and fun
- Known for events and festivals

#### **Livability**

- “It’s the place to live”; bedroom community and multi-family heavy
- Place for those wanting to downsize and have a downtown lifestyle
- Good city to work with, where residents always feel like they have a voice

#### **Best Place to Start a Business**

- Best place in Texas to start a business (Nerd Wallet)
- Perfect spot for more corporate growth and economic development, business-friendly
- Hub for small- to mid-sized companies

#### **Unique Location**

- Centrally-located between Dallas-Fort Worth and Plano/Frisco
- Addison is perfect. It is the filet mignon of Dallas. The perfect cut. Close enough to Dallas but far away
- Big city, small town feel
- Oasis, tucked away

#### **Other**

- General aviation center
- Trend-setter, sets the tone for the region
- Addison is the little sibling that wants to play with the big ones
- Addison is the uncle; steady, always there. The one you’ve always liked but surprised when they speak wisdom
- Addison is the young adult with the vibe of an older brother

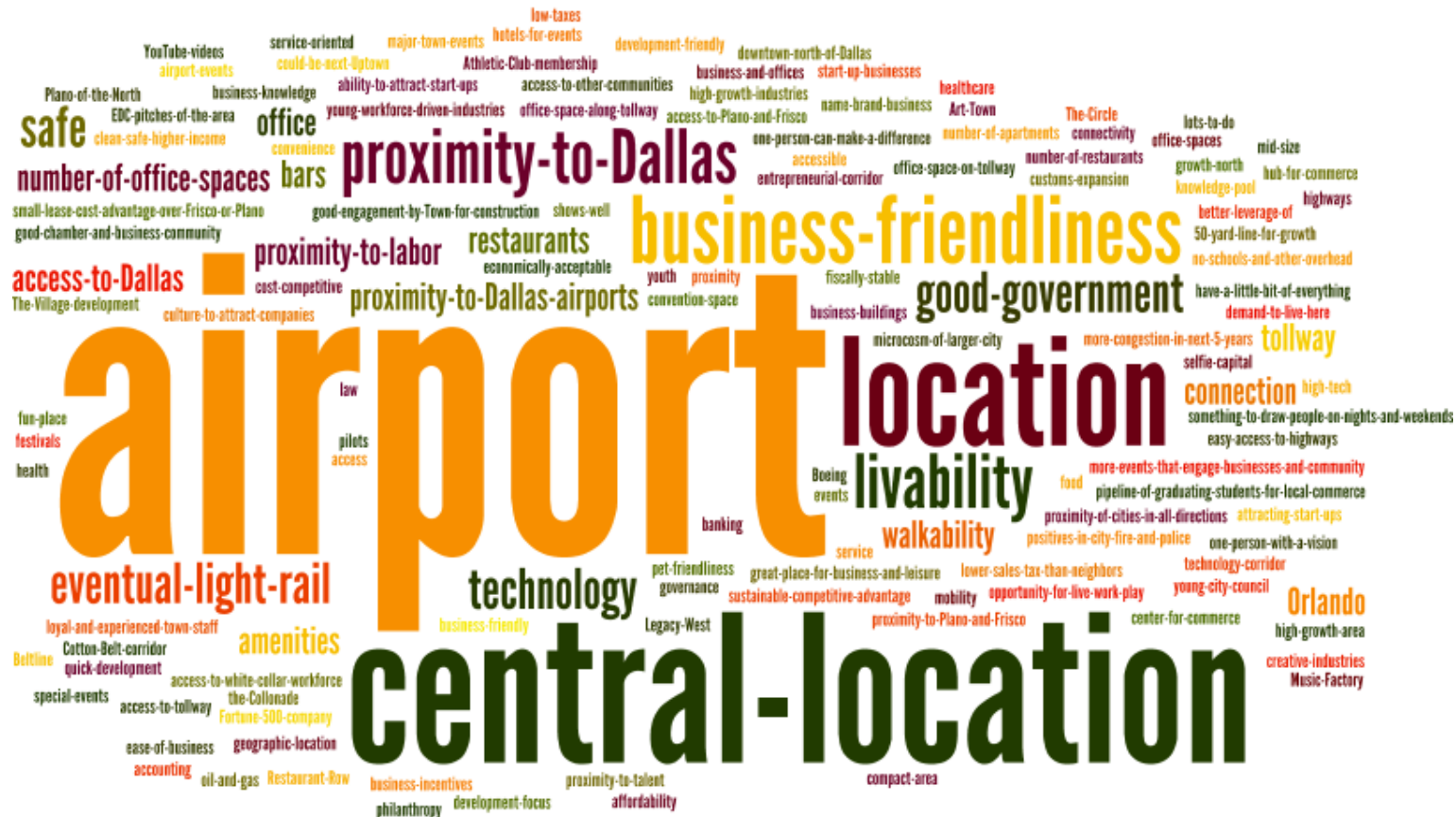


## Stakeholder and Employer Input and Analysis

## ALL RESPONDENTS

**WHAT ARE THE TOWN OF ADDISON'S GREATEST ECONOMIC ASSETS? WHICH INDUSTRIES OR CLUSTERS DO YOU THINK THE TOWN OF ADDISON IS, OR COULD BE, COMPETITIVE IN?**

*Respondents most frequently noted the airport, central location, proximity to Dallas and business friendliness of the Town of Addison as it's greatest economic assets. Aviation, technology, restaurants, and offices were noted as industries or clusters the Town of Addison is or could be competitive in.*



*Note: The size of the words in the word cloud represents the frequency of that response. Hyphens between words are used to keep phrases together when generating the word cloud.*

# Stakeholder and Employer Input and Analysis

## ALL RESPONDENTS

### IF YOU WERE GOING TO BRAG ABOUT THE TOWN OF ADDISON TO A FRIEND, WHAT WOULD YOU TELL THEM?

*Respondents noted residential, amenities (such as restaurants, bars and events), infrastructure (like the airport and Cotton Belt Rail Line), and business friendliness as some of the things they would brag to a friend about the Town of Addison. The strengths of the Town of Addison are listed below:*

#### **Great Place to Live**

- Great place to live and raise a family
- Great place to work/play, but not live
- Has urban living options, like Uptown, Addison Circle and Vitruvian
- Hidden gem is residential

#### **Things To Do**

- Always something going on
- Festivals (Kaboom Town, Oktoberfest, Taste of Addison, Vitruvian lights, smaller music events)
- Over 180 bars and restaurants in 4 square miles
- Great places to meet or eat
- Restaurant capitol of the US
- It's the most fun you can have in 4 square miles

#### **Good Location**

- Centrally located
- Easily accessible location
- One of the best kept secrets in the Dallas-Fort Worth Metro

#### **Infrastructure**

- Quality infrastructure
- Corporate airport
- The soon to be built Cotton Belt Rail Line

#### **Business Friendly**

- Business-friendly
- Proactively working on being bigger/better and more effective
- Low tax rate
- Lots of business amenities

#### **Other**

- Optimistic
- Small town feel within an urban environment
- Shiny, fun
- Hip and growing; responsive to residents

# Stakeholder and Employer Input and Analysis

## ALL RESPONDENTS

### WHAT ARE SOME CHALLENGES THAT THE TOWN OF ADDISON IS FACING? WHAT ARE SOME IMPROVEMENTS YOU WOULD LIKE TO SEE IN THE COMMUNITY?

Responses to this question were open-ended, but were grouped into common themes. The most notable challenges and improvements were centered around the community brand, transportation infrastructure and connectivity, housing, and business. The suggestions are listed below:

CHALLENGES	IMPROVEMENTS
<b>Branding Comments</b>	
<ul style="list-style-type: none"> <li>• Lack of a sense of place – can't distinguish Addison from other communities</li> <li>• Competition for events has increased</li> <li>• Lacks a vision that everyone can get behind (community, elected official, and staff support)</li> </ul>	<ul style="list-style-type: none"> <li>• Rebrand Addison, including branding the art world</li> <li>• Leverage persona of event center/community</li> <li>• Leverage the aviation epicenter and flight museum</li> <li>• Host events at the airport</li> <li>• Improve messaging to end users/consumers/people who aren't 'in the know'</li> <li>• Leverage existing assets to draw people here</li> <li>• Remind people we still exist around Plano</li> <li>• Need a visioning exercise</li> </ul>
<b>Transportation Infrastructure and Connectivity Comments</b>	
<ul style="list-style-type: none"> <li>• Lots of traffic congestion</li> <li>• Access at the tollway gets backed up</li> <li>• Poor transportation infrastructure</li> <li>• Lack of parking</li> <li>• Lack of walkability and safe bikeability</li> <li>• Separated and disconnected neighborhoods</li> <li>• Lack of public transportation</li> <li>• Trinity River sewer situation cost the Town money to extend sewer to Inwood Road Triangle</li> </ul>	<ul style="list-style-type: none"> <li>• Improve transportation infrastructure, including public transportation (more bus routes, getting DART), making sure Cotton Belt Rail Line happens on schedule, providing notices of upcoming roadwork projects and adding parking</li> <li>• Foster walkability and neighborhood connectivity, like adding a walking bridge or grassy park over the tollway (Note: \$2 million will be spent on a multimodal path on Midway Road from Spring Valley to Addison Circle)</li> <li>• Tesla Super Charging Station (would be the first in the Dallas area)</li> <li>• Parking could be better at the airport, short-term and long-term</li> <li>• Would be great to have a shuttle service and/or circulator connecting to the new DART station</li> </ul>

# Stakeholder and Employer Input and Analysis

## ALL RESPONDENTS

WHAT ARE SOME CHALLENGES THAT THE TOWN OF ADDISON IS FACING? WHAT ARE SOME IMPROVEMENTS YOU WOULD LIKE TO SEE IN THE COMMUNITY? (CONT'D)

CHALLENGES	IMPROVEMENTS
<b>Housing and Livability Comments</b>	
<ul style="list-style-type: none"> <li>Public schools are poor – Addison is not a place for kids</li> <li>Not a place for families and “a no man’s land for a 28-year-old”</li> <li>More focus on business than residential</li> <li>Nothing to do after going to restaurants, lack of week night and weekend activities – “nothing exciting here”</li> <li>Not a diverse housing area</li> <li>High costs (like Dallas County tax rates) for a young family</li> <li>Homelessness is an issue in Addison Circle</li> <li>Service industry workers and lower wage/salary workers cannot afford to live here</li> <li>Frisco took all the new developments and families</li> <li>Lots of restaurants but few cool new ones</li> </ul>	<ul style="list-style-type: none"> <li>More multifamily options, especially for younger people</li> <li>Need a draw for weeknights to keep people here</li> <li>Need more entertainment options</li> <li>We need to build more owner occupied housing instead of rentals</li> <li>We need to even out the daytime versus nighttime resident numbers</li> <li>Need senior living options for active seniors until end of life</li> <li>Need more, larger dog parks and places to let dogs off-leash and run</li> </ul>
<b>Business and City Comments</b>	
<ul style="list-style-type: none"> <li>Not enough space – Addison has no more land or office space</li> <li>Leases are too long – financials don’t work for startups at 5-7 years</li> <li>Need incremental or transitional space for startups</li> <li>Outdated facilities, lacking ADA compliance</li> <li>West side of the airport is very industrial</li> <li>Losing workers for 1.5 hours to restaurants while they have to use a car to get there and search for parking</li> <li>Lack of clear objectives of city</li> <li>City keeps putting up roadblocks to complete new hangars at the airport</li> <li>Lack of transparency and honesty with providing historical documents and giving approvals</li> <li>Very small number of people control and set the agenda</li> <li>The business community has too small a say as compared to residents (1000 voters), when the business community is the engine that drives the quality of life for those residents</li> <li>Doesn’t fit as modern day zoning</li> <li>As DART member, lack financials to provide incentives</li> </ul>	<ul style="list-style-type: none"> <li>Capitalize on land that could be redeveloped</li> <li>Hotels are ok, but nothing sexy. Could use something with more appeal</li> <li>Could do better at business-to-business support, like offering networking opportunities</li> <li>Better restaurants and retail at the airport</li> <li>Develop coalitions</li> <li>End fighting with neighbors</li> <li>Find a new source of revenue to replace liquor sales</li> <li>Find ways to differentiate industry moving forward</li> <li>Could use an ombudsman to work through permitting and development challenges with the city (way too long to wait to get approvals)</li> <li>Need food trucks that rotate around the office tower area (and other smaller scale activation efforts)</li> <li>Add a turn-key hangar at the airport</li> <li>Allow mixed use and lots</li> <li>Need innovation across community</li> </ul>

# Stakeholder and Employer Input and Analysis

## ALL RESPONDENTS

### **DOES THE TOWN OF ADDISON PROVIDE AN APPROPRIATE MIX OF HOUSING CHOICES TO SERVE THE NEEDS OF THE COMMUNITY AND, IN YOUR OPINION, HELP PROMOTE ECONOMIC DEVELOPMENT AND JOB GROWTH?**

*Responses regarding housing choices were mixed regarding volume of multi-family housing availability. However, most noted the lack of availability of a diversity of affordable housing choices for different living experiences. Housing for young professionals, single families, low income, and elders were noted as lacking. Some of the responses are listed below:*

#### **Housing Types**

- Depends on the target group. For Millennials, with Addison Circle, and multi-family and Vitruvian, it's appropriate
- What makes a great community is everyone has an opportunity to live there and is diverse, including economic/income

#### **Multi-Family**

- Covered for multi-family
- Multi-family housing is a strength
- Need more vertical housing
- Needs more multifamily choices

#### **Single-Family**

- Not attractive to young and small families
- People don't move from single family homes very often, and when they do, they go fast

#### **Senior Living**

- No place for elders

#### **Housing Affordability**

- Most are very segregated by income and less opportunities for low income
- Low income is challenging
- For slightly more expensive single family, it's good
- Generally has housing right for business, but lack of affordability
- Lack of affordable housing
- Need more affordable housing for younger workforce
- Condo 325 to 350, then housing jumps to 650 to a million – hardly anything in between
- Lower end track housing (80's), but not really for young families
- If affordable housing is an issue got funding through TIF, and may want to form those districts now for the future
- What's built is very expensive



# Stakeholder and Employer Input and Analysis

## ALL RESPONDENTS

**ARE YOU HAPPY WITH THE MOBILITY CHOICES (AUTO, WALKING, TRANSIT) THAT ARE PROVIDED WITHIN THE TOWN AND CONNECTING TO OTHER KEY DESTINATIONS? IF NOT, WHAT MOBILITY CHOICES WOULD YOU LIKE TO SEE PROVIDE, AND TO CONNECT TO WHAT LOCATIONS/DESTINATIONS (WITHIN THE TOWN, OR OUTSIDE)?**

*Most respondents noted the prevalence of automobiles as the major form of transportation and the need for a greater diversity of transportation options, including improving the safety and connectivity of biking and walking options, using people movers or autonomous vehicles, improving public transportation options and creating pedestrian only zones. Some of the responses are listed below:*

### **Automotive**

Only mode is auto, everyone drives here

### **Walking/Biking**

Need to re-invent mobility (walk, bike-focused development)

- Provide opportunity to not get in a car if visiting, like Pearl Street and focus on the shops on the same street
- Need more business and pedestrian-oriented areas, possibly no auto use
- Walking can be “scary”, take your life in your hands if you are walking or biking
- Need connected, lit walkways
- Not bike friendly, not walking friendly
- Use Midway and other places to widen bike and walking options
- Bicycle lanes/trails connecting to other trails would be huge
- I like the walkability of the city

### **Rail**

- Looking forward to DART
- North south connections off rail
- Would love to see rail from Addison to DFW airport

### **Public Transportation**

- If money no object, then have a people mover – if we could meet that need
- Needs to have some sort of people mover or shuttle or something to get people around
- It’s good but going to get better with Cotton Belt, master transportation plan from 2016
- Would like to have better connections to other airports and possibly downtown/Plano
- Better public transportation, not just here but in DFW. Cotton Belt Rail Line in Addison Circle Park would be a game changer

### **Autonomous Vehicles**

- Can a deal be signed (like Arlington) around autonomous vehicles and run a pilot to Addison Circle to other key locations
- Addison could be an autonomous vehicle hub and transportation hub for North Dallas

### **Other**

- Has a mobility problem, needs mobility options
- Have a need for parking – short and long term
- Very limited in terms of linkages (i.e., Vitruvian is totally isolated)
- Needs an Uber terminal at the airport



# Stakeholder and Employer Input and Analysis

## ALL RESPONDENTS

**DOES ADDISON PROVIDE THE TYPES OF NEIGHBORHOODS AND DISTRICTS THAT YOU DESIRE (E.G., BEDROOM COMMUNITIES, COMMERCIAL CORRIDORS, WALKABLE DOWNTOWN-LIKE ENVIRONMENTS)? WHAT DO YOU FEEL IS LACKING IN TERMS OF THE TYPES OF PLACES IN WHICH YOU WISH TO LIVE, WORK, LEARN, SHOP AND/OR PLAY?**

*Some of the responses are listed below:*

### **Yes, Addison provides desirable neighborhoods**

- I like the Addison Circle and Vitruvian communities
- I adore where I live
- Central location for townhomes

### **No, Addison does not provide desirable neighborhoods**

- More quality multi-family to balance night-time popularity with daytime
- Senior living is something that is brought up often – seniors growing to the point of wanting to stay here
- Maybe some townhomes
- Multi-family is the #1 issue politically
- Next growth wave will be more organic with “less work”
- With population growth in North Texas, will get gridlocked for Addison. Gridlock may be good – close to 635, rail, near tollway, airport, pedestrian walkability, uber, flight, etc.
- Need more higher end full service hotels
- No lower cost and no real choices to evolve in housing and stay in Addison
- Need proper density to support the places they desire
- No neighborhoods in swaths of the community
- Something more like the New Urbanism of Legacy West

# Stakeholder and Employer Input and Analysis

## ALL RESPONDENTS

### DOES ADDISON PROVIDE FOR SAFE ROUTES FOR WALKING TO AND FROM KEY DESTINATIONS, INCLUDING HOME, WORK AND SCHOOL? HOW IMPORTANT AN ISSUE IS WALKABILITY INCLUDING, BUT NOT LIMITED TO, SAFETY?

*A majority of respondents noted the lack of safe routes for walking and the disconnected nature of those sidewalks and paths that do exist within the Town. Walkability was primarily noted as being important for community development and safety. Some of the responses are listed below:*

#### **Yes, Addison Provides Walkability**

- Addison Circle is walkable. There are pockets of walkability
- Good. As a homeowner, walkability is very important
- For a town as small and commercial, I think walking is as good as it can be
- Addison Circle is very walkable
- It's huge. Its why we moved there – a lot like where we used to live
- People could walk about half mile to the Circle so tenants don't move there for access to the Circle and about as good as can get for affordable/workhouse. But walk to Kaboom Town etc.

#### **No, Addison Does Not Provide Walkability**

- No
- Walking is scary
- Not really. Belt Line is a huge divider
- Not even sidewalks in much of the area
- Traffic is a real issue for walking and biking
- Belt Line is really not walkable.
- Rarely see people walking, but has potential
- Must balance the modes of transportation
- Continue to develop walkability as they get opportunities (not so much proactive)
- For Vitruvian – border farmers branch and college, so harder to walk to Belt Line or places north. Selling point is retail component but tough to lease up some space. People don't recognize or use the trail system – need to make them more aware of the trail
- Belt Line and Midway community – not much connectivity. Crossing Belt Line is a major barrier – instead of walking would drive
- Many other neighborhoods where not sidewalks on one side
- Need to connect to east of tollway

# Stakeholder and Employer Input and Analysis

## ALL RESPONDENTS

**DOES ADDISON PROVIDE FOR BIKING OPTIONS TO AND FROM KEY DESTINATIONS, INCLUDING HOME, WORK AND SCHOOL? HOW IMPORTANT AN ISSUE IS BIKING TO YOU FROM BOTH A MOBILITY/TRANSPORTATION PERSPECTIVE AND FOR LEISURE/EXERCISE?**

*The importance of biking for transportation and leisure was considered mixed. Some of the responses are listed below:*

### **Yes, Addison Provides Biking Options**

- Bike lanes are provided. This is not important
- Not an important issue
- Yes
- Limited biking - some trails and paths for walking though

### **No, Addison Does Not Provide Biking Options**

- Not really much biking here
- Cars and not friendly streets to navigate
- Very dangerous
- Look into it for master transportation plan but not especially strong interest (chicken or egg though)
- Do we invest and hope to get to demand
- MTP – try some pilot projects, create some bike routes (likely not on Belt Line) and see if that demonstrates demand but issue with time and resources
- So much concrete its too hot, no shade (referring to bike paths)
- Everything is centered around cars
- Bicycle lanes/trails connecting to other trails would be huge. Addison does not provide many biking options, and this is extremely important. I have to use major roadways to get to bike-friendly trails

## Stakeholder and Employer Input and Analysis

## ALL RESPONDENTS

**WHAT STORES, ENTERTAINMENT/CULTURAL OPTIONS AND AMENITIES (PARKS, OPEN SPACE, RECREATIONAL, PUBLIC SPACES) DO YOU USE THE MOST WITHIN ADDISON? WHAT OPTIONS WOULD YOU LIKE TO SEE PROVIDED?**

*The responses below indicate what is most important to Addison stakeholders and employers. This includes restaurants, parks, connectivity, events, entertainment, walkability, etc.*



*Note: The size of the words in the word cloud represents the frequency of that response. Hyphens between words are used to keep phrases together when generating the word cloud.*

# Section 4: Community Survey Responses



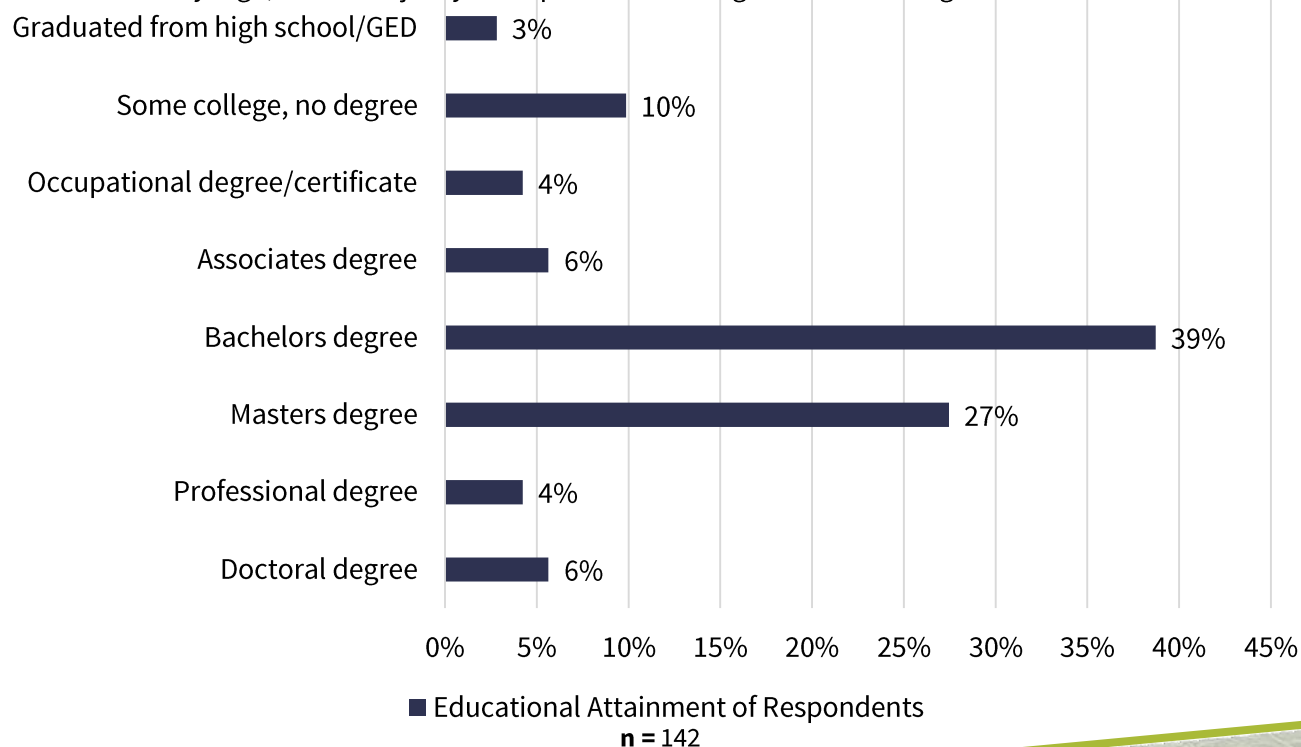
# Community Survey Responses

## ALL RESPONDENTS

### SUMMARY

A community input survey was conducted to help identify what the key opportunities and challenges are for economic development and community development in Addison. The total number of responses was 145. While this sample size is not statistically significant, the responses in this section have been analyzed to provide input directionally. Each question may have a different number of respondents, which is noted following the letter “n” in this report. The following pages contain the analysis of those survey responses. It should be noted that there are several factors that contribute to bias in the responses, which are as follows:

- 74% of respondents were Caucasian
- 84% of respondents had an annual household income above \$50,000, with 45% of those having an annual income above \$100,000
- Education levels were relatively high, with a majority of respondents having a bachelor's degree. The breakdown can be seen in the chart below.



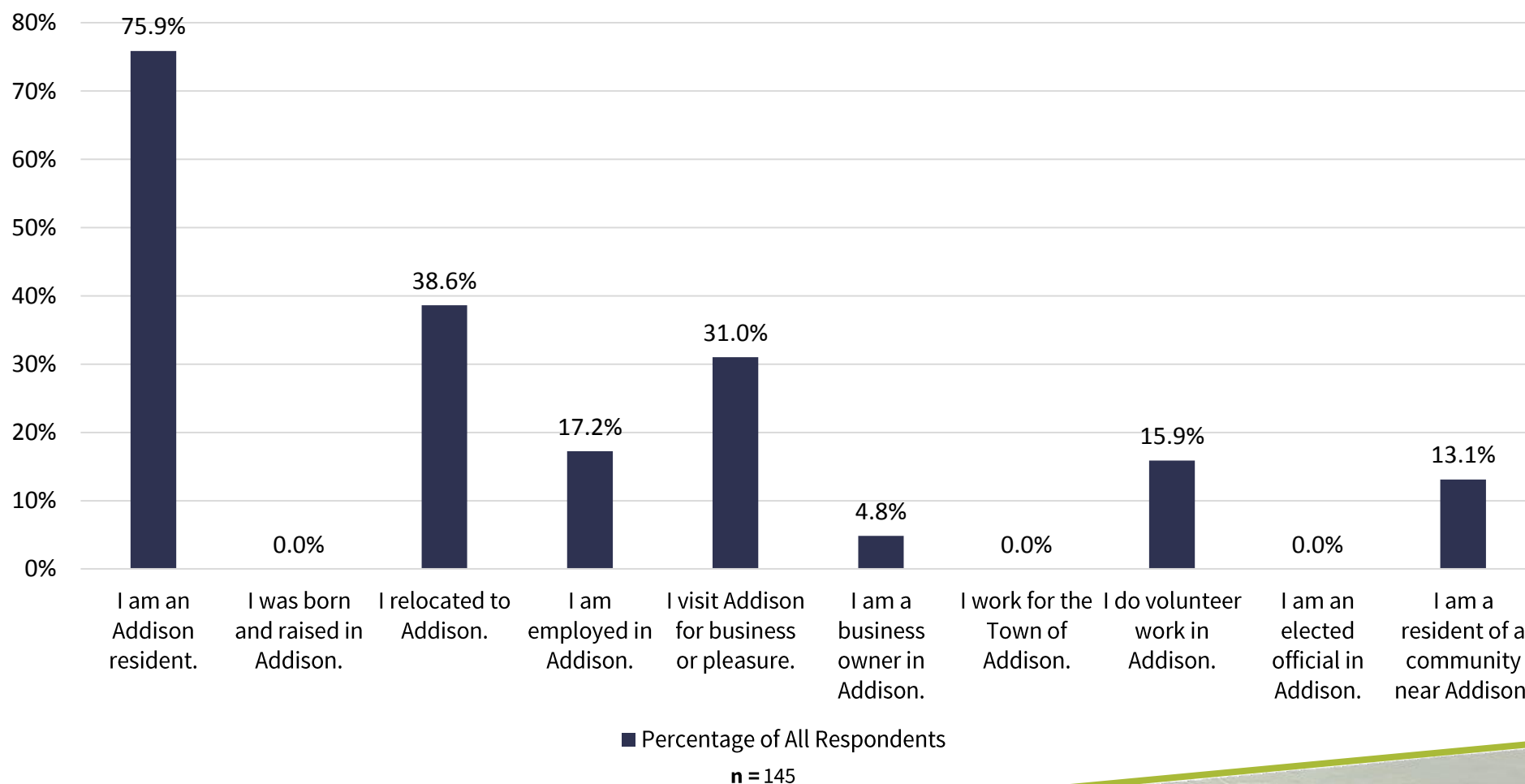


# Community Survey Responses

## ALL RESPONDENTS

**WHICH OF THE FOLLOWING RELATIONSHIPS DO YOU HAVE WITH THE TOWN OF ADDISON? PLEASE CHECK ALL THAT APPLY.**

*Three-quarters of the respondents noted being a resident of Addison (75.9%), with more than one-third noted having relocated to Addison (38.6%). About one-third visit Addison for business or pleasure (31.0%).*





# Community Survey Responses

## RESIDENTS

### WHAT WORD OR PHRASE FIRST COMES TO MIND WHEN YOU THINK ABOUT ADDISON?

Residents most frequently noted restaurants, community and fun as the words that first come to mind about the Town of Addison. Other notable words that came to mind include safe, home, clean, friendly, food, good food, special events, Kaboom Town and activities.

n = 111



Note: The size of the words in the word cloud represents the frequency of that response. Hyphens between words are used to keep phrases together when generating the word cloud.

# Community Survey Responses

## NON-RESIDENTS

### WHAT WORD OR PHRASE FIRST COMES TO MIND WHEN YOU THINK ABOUT ADDISON?

*Non-residents most frequently noted fun, restaurants and food as the words that first come to mind about the Town of Addison.*

n = 34



*Note: The size of the words in the word cloud represents the frequency of that response. Hyphens between words are used to keep phrases together when generating the word cloud.*

# Community Survey Responses

## BUSINESS OWNERS

### WHAT WORD OR PHRASE FIRST COMES TO MIND WHEN YOU THINK ABOUT ADDISON?

*Business owners most frequently noted community as the word that first come to mind about the Town of Addison.*

n = 7

#### Residents

- Community
- Restaurants
- Dying
- Clean
- Community

#### Non-Residents

- Party
- Suburban office buildings



# Community Survey Responses

## ALL RESPONDENTS

### HOW HAS ADDISON EVOLVED IN THE LAST DECADE?

n = 130

*Respondents noted the growth:*

#### Growth

- Professionally, attracted new businesses and more residents
- Beautification and tech updates have been great
- Good growth commercially
- More residential, less chain restaurants
- Trendier, more arts and landscaping and increased sophistication with more to enjoy
- Entertainment in the area has grown significantly, and there's more to do
- Went from a trendy nightspot to a more family friendly city
- Becoming more upscale, more technological and modern
- More upbeat and safer place to live
- There seems to be a continued emphasis on developing our trails and parks, as well as building out open plots of land
- Vitruvian Park is a very nice addition. It has greenspaces
- Addison does a good job having events like a large city, but keep a small town feel
- So much more than restaurants and the airport now
- I just recently had a child and I love all the activities that go on
- Town staff attitude and leaders transparency are getting better
- Infrastructure and cleanliness improvements
- It has moved to create a rich community environment
- Town events have grown and are exceptional. I rarely have reason to leave
- Vitruvian development was a significant addition to the Town
- Formalized economic development, and focused on improving Belt Line and shops
- Restaurant and hotel culture are as alive as ever
- Not much room to grow, but Addison has stayed modern and up-to-date
- Better outreach/advertising

#### Decline

- Devolved from restaurants to unsure about its future
- Has lost its "town" residential spirit
- Too many apartments
- Seems to be underdeveloped and stuck in the age of the blue collar workforce
- Much work needs to be done on creating a quality retail and restaurant market on west of Midway area. This area very overlooked by development and not listening to resident input for local needs
- Political strife with divisive politics that has no place in Addison
- It was one of the best maintained and well manicured towns in Dallas County, but has been declining for some time now
- Prestonwood mall redevelopment was the most disappointing redevelopment of an iconic piece of real estate
- Restaurants are quickly opening and shutting their doors. The stability is shaky in my eyes
- Declining in the competitive race for entertainment dollars
- It has lost some of its "Addison Way" mojo
- Obvious polarized political climate that affects community cohesiveness
- Went from thriving economic hot zone to a dilapidated struggling community that cannot keep up with the Jones' anymore
- It hasn't. It's a community stuck in time while all its neighbors have become alive
- Lost revenue to alcohol sales, lost business to Uptown
- East has fared better than west

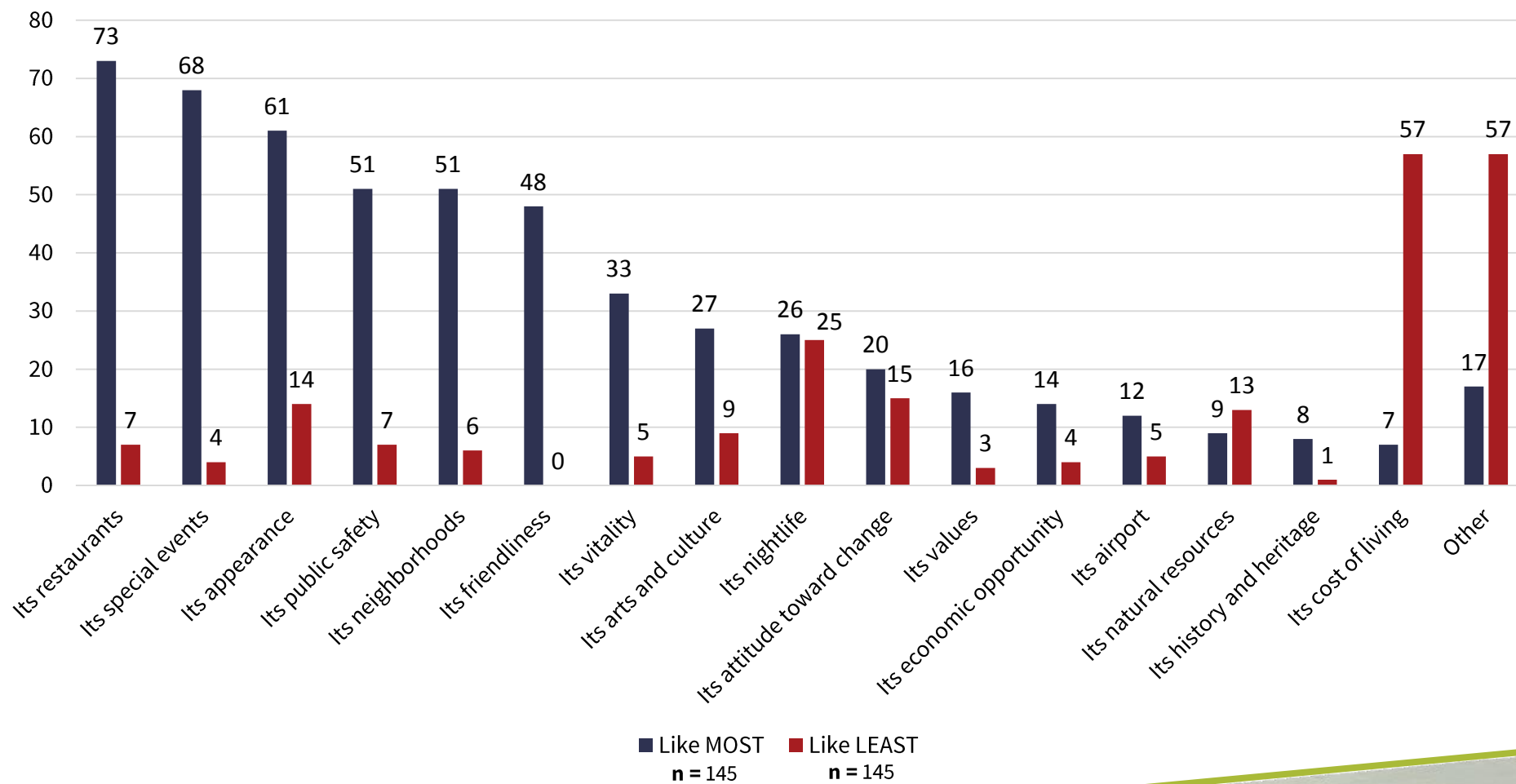


# Community Survey Responses

## ALL RESPONDENTS

### WHAT DO YOU LIKE MOST AND LEAST ABOUT ADDISON? (CHOOSE UP TO THREE FOR EACH RESPONSE.)

Respondents like the restaurants, special events, appearance and public safety of Addison most, while the other factors, its cost of living, nightlife, and attitude toward change were least liked about Addison. The number of responses received by category are shown below.

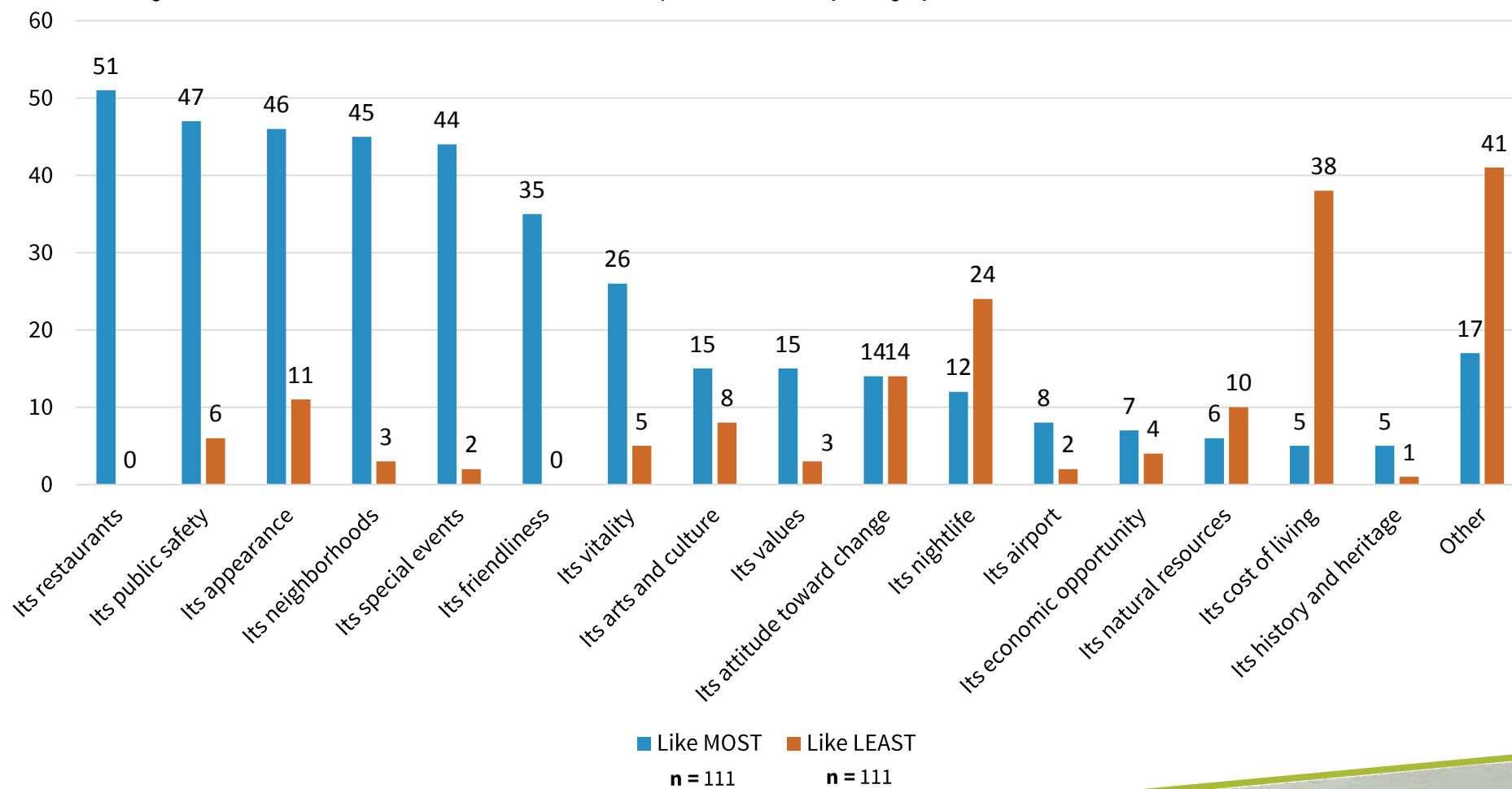


# Community Survey Responses

## RESIDENTS

WHAT DO YOU LIKE MOST AND LEAST ABOUT ADDISON? (CHOOSE UP TO THREE FOR EACH RESPONSE.)

Residents like the restaurants, public safety, appearance and neighborhoods of Addison most, while the other factors, its cost of living, nightlife, and attitude toward change were least liked about Addison. The number of responses received by category are shown below.

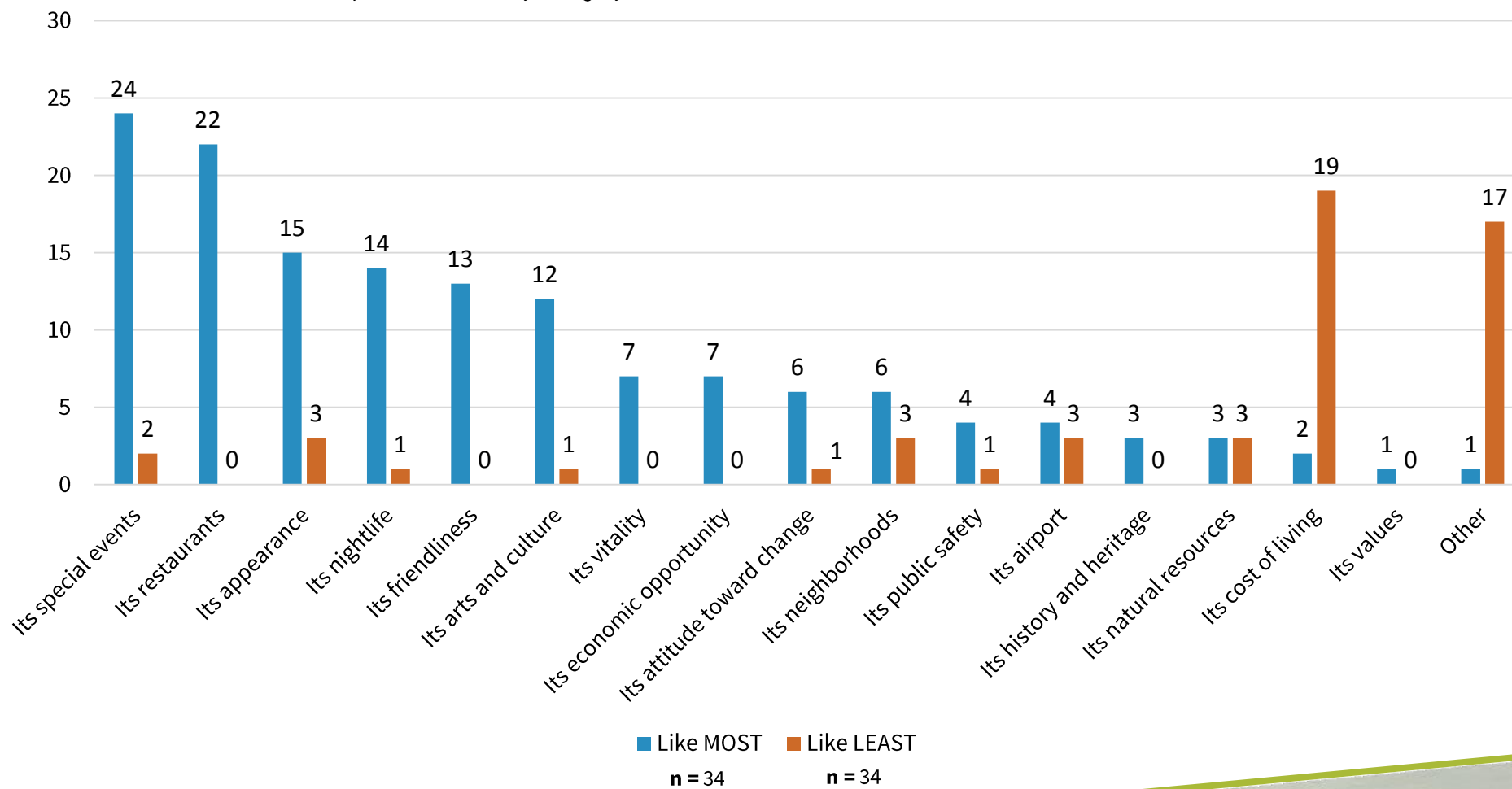


# Community Survey Responses

## NON-RESIDENTS

WHAT DO YOU LIKE MOST AND LEAST ABOUT ADDISON? (CHOOSE UP TO THREE FOR EACH RESPONSE.)

Respondents like the special events, restaurants, appearance and nightlife of Addison most, while the other factors and its cost of living were least liked about Addison. The number of responses received by category are shown below.



# Community Survey Responses

## BUSINESS OWNERS

WHAT DO YOU LIKE MOST AND LEAST ABOUT ADDISON? (CHOOSE UP TO THREE FOR EACH RESPONSE.)

*Business owners like the friendliness, special events, vitality and neighborhoods of Addison most, while its cost of living, and appearance were least liked about Addison. The number of responses received by category are shown below.*

n = 7

### MOST

#### Residents

- Its friendliness (2)
- Its special events (2)
- Its vitality (2)
- Its neighborhoods (2)
- Its values
- Its appearance
- Its public safety
- Its airport
- Its restaurants

#### Non-Residents

- Its economic opportunity
- Its public safety
- Its special events

### LEAST

#### Residents

- Its cost of living (4)
- Its appearance (2)
- Its restaurants
- Other: Lack of outdoor sports facilities

#### Non-Residents

- Its cost of living
- Its neighborhoods
- Other: No walkable, mixed use developments besides Addison Circle. Poor executive housing options.

# Community Survey Responses

## ALL RESPONDENTS

### WHAT DO YOU LIKE MOST ABOUT ADDISON?

*For those 17 respondents who noted 'Other' in the previous section, their responses are listed below. The number of responses received by category are shown in parentheses.*

**n = 17**

- Central location, proximity to Plano/Frisco/Dallas downtown (6)
- Athletic Center (4)
- Town of Addison staff and employees, including police and courts (3)
- Size (2)
- Parks (2)
- Community events
- Addison would be perfect if there was more walkable access to clean restaurants and bars that do not allow smoking
- My immediate neighborhood
- Great amenities
- Mostly professionals and retired people here.
- Does not feel like Texas
- Addison Circle doesn't look like Texas
- Its Addison Way

# Community Survey Responses

## ALL RESPONDENTS

### WHAT DO YOU LIKE LEAST ABOUT ADDISON?

*For those 57 respondents who noted 'Other' in the previous section, their responses are listed below. The number of responses received by category are shown in parentheses.*

**n = 57**

- Politics, government drama, political divisiveness, lack of transparency, etc. (14)
- Traffic and congestion (8)
- Nothing (6)
- Lack of appropriate, affordable housing; too many apartments (5)
- Lacking retail and restaurant diversity (4)
- Schools (4)
- Roads, construction, and transportation infrastructure (4)
- Lack of walkability, sidewalks, and connections from housing to retail/dining establishments (3)
- Lack of friendliness (2)
- Smoking ban in bars would be nice (2)
- Lacking identity (2)
- Lack of fiduciary responsibility (2)
- Lack of maintenance of public buildings and poor appearance
- There are too many old low-rated motels located in Addison
- Getting too expensive to live here
- Dated concepts
- Lack of outdoor sports facilities
- The run down apartment complexes at Marsh and Sydney
- Town has a certain haughtiness about it
- No mixed use developments besides Addison Circle. Poor executive housing options
- Too many vacant buildings. Need to find ways to encourage business growth on the west side of the tollway



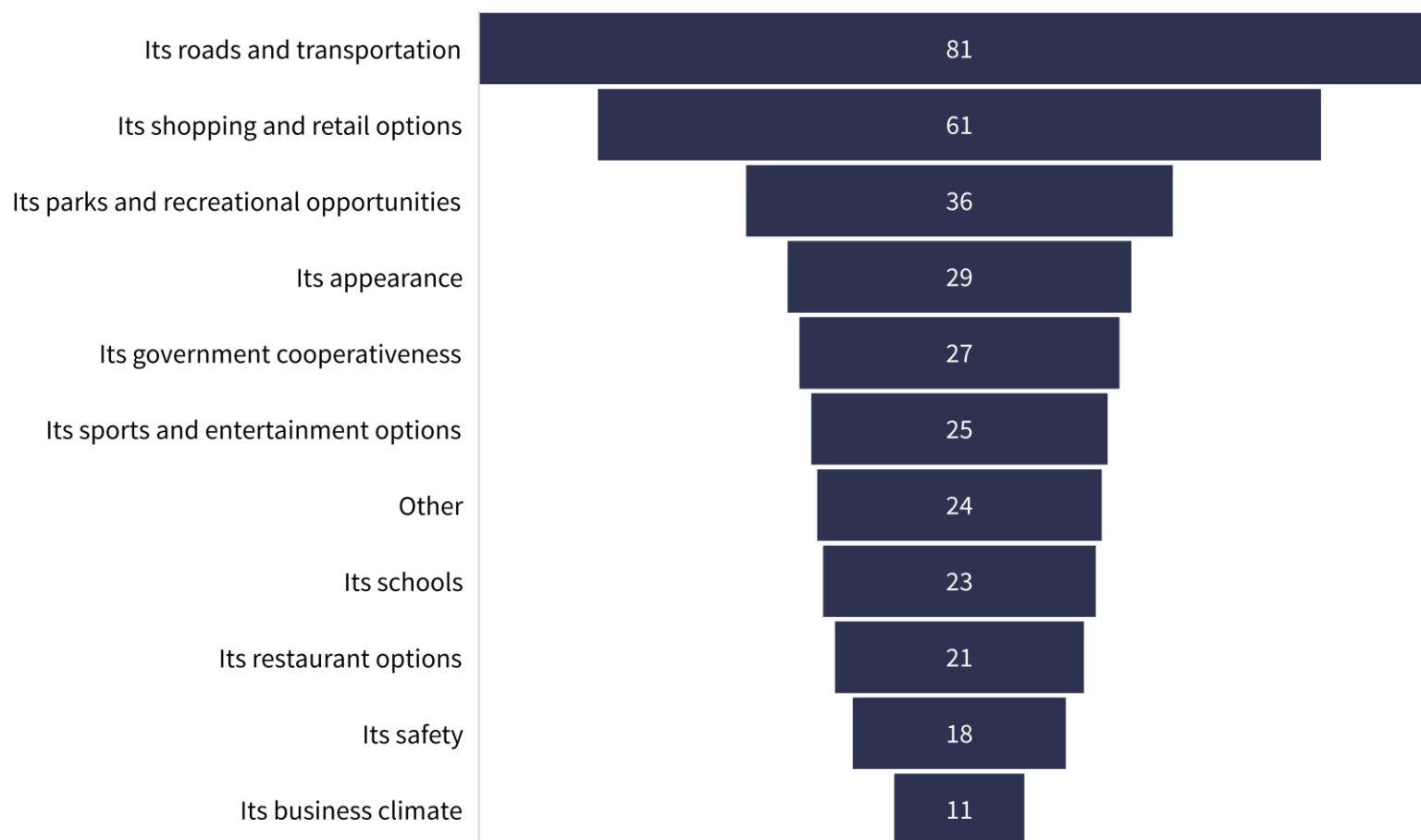
# Community Survey Responses

## ALL RESPONDENTS

IN THE NEXT TWO OR THREE YEARS, WHAT WOULD YOU LIKE TO SEE ADDISON IMPROVE? (CHOOSE UP TO THREE.)

*Most responses indicated improvements the roads and transportation, shopping and retail options, and parks and recreational opportunities of the Town of Addison would be welcomed in the next three years.*

n = 145



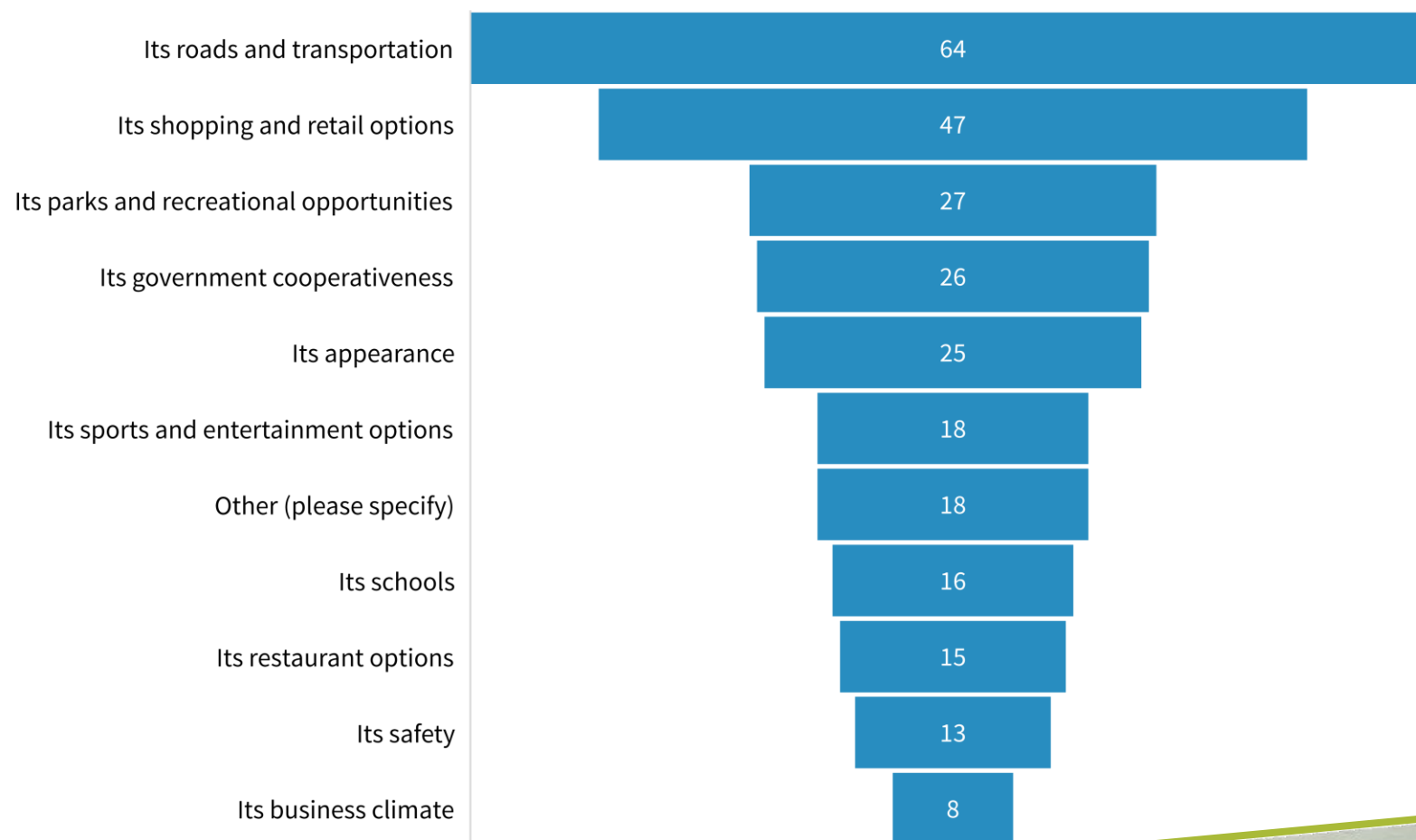
# Community Survey Responses

## RESIDENTS

**IN THE NEXT TWO OR THREE YEARS, WHAT WOULD YOU LIKE TO SEE ADDISON IMPROVE? (CHOOSE UP TO THREE.)**

*Residents indicated improvements in the roads and transportation, shopping and retail options, and parks and recreational opportunities of the Town of Addison would be welcomed in the next three years.*

**n = 111**

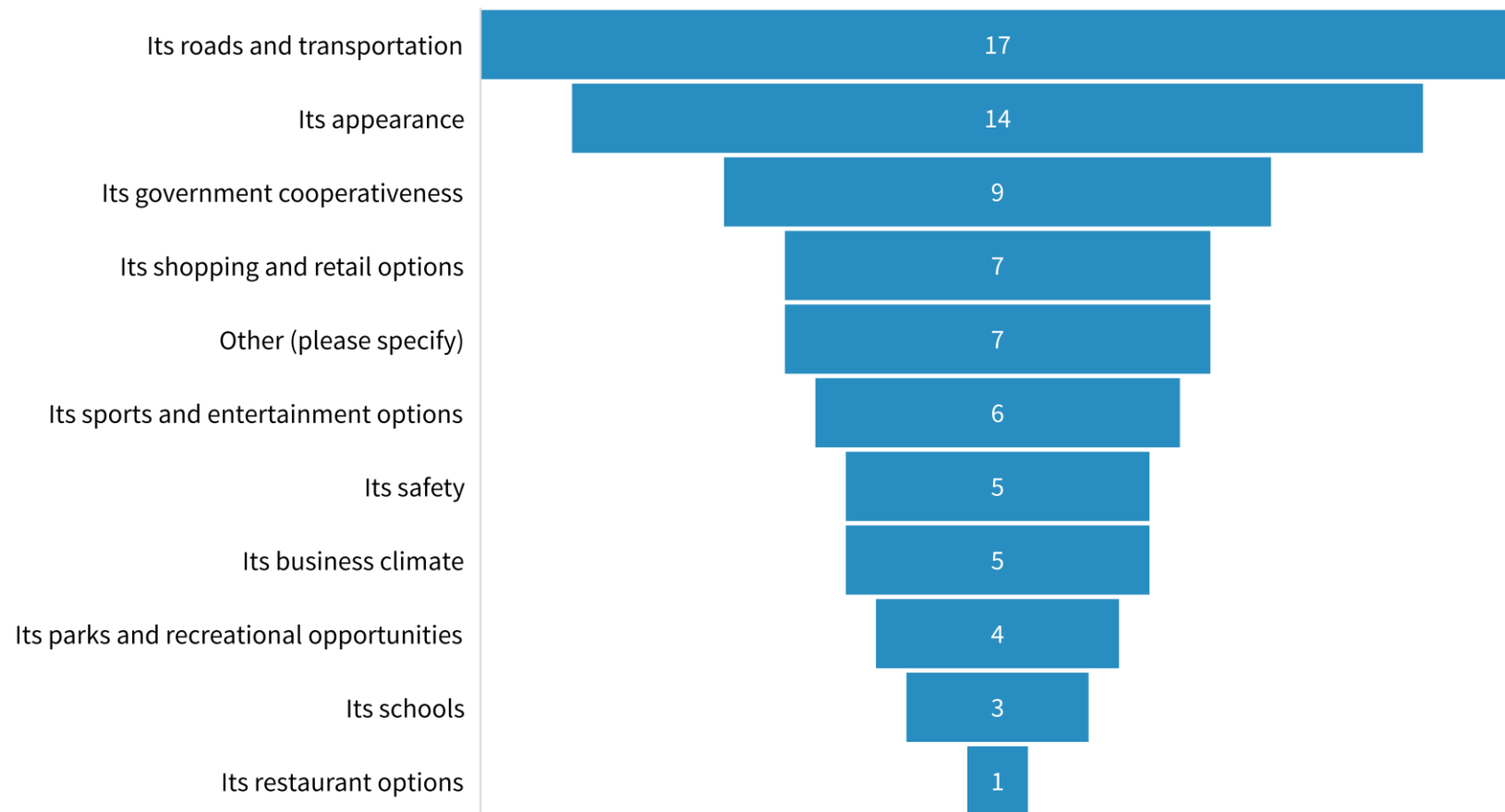


# Community Survey Responses

## NON-RESIDENTS

IN THE NEXT TWO OR THREE YEARS, WHAT WOULD YOU LIKE TO SEE ADDISON IMPROVE? (CHOOSE UP TO THREE.)

*Non-residents indicated improvements in the roads and transportation, appearance and government cooperativeness of the Town of Addison would be welcomed in the next three years.* **n = 34**



# Community Survey Responses

## BUSINESS OWNERS

**IN THE NEXT TWO OR THREE YEARS, WHAT WOULD YOU LIKE TO SEE ADDISON IMPROVE? (CHOOSE UP TO THREE.)**

*Non-residents indicated improvements in the roads and transportation, appearance and government cooperativeness of the Town of Addison would be welcomed in the next three years.*

**n = 7**

### **Residents**

- Its roads and transportation (2)
- Its appearance (2)
- Its parks and recreational opportunities (2)
- Its schools
- Its business climate
- Its governmental cooperativeness
- Its safety
- Other comments: Pickleball

### **Non-Residents**

- Its roads and transportation (2)
- Its appearance
- Its schools
- Other comments: Addison must readopt it's roots in being a leader in mixed use, connected developments with office, F&B, and housing. Projects like the Quorum and one-off, isolated office buildings are no longer attractive to the Millennial generation. Addison must support and promote re-positioning of it's office assets to compete with Frisco, Plano, Galleria, Mid-Town, etc.

# Community Survey Responses

## ALL RESPONDENTS

### IN THE NEXT TWO OR THREE YEARS, WHAT WOULD YOU LIKE TO SEE ADDISON IMPROVE? (CHOOSE UP TO THREE.)

For those 24 respondents who noted 'Other' in the previous section, their responses are listed below. The number of responses received by category are shown in parentheses.

n = 24

#### Walkability/Transportation Infrastructure

- Walkability
- Better planning to reduce traffic
- Roads near DNT exits
- Walking path connections
- Would like a flashing yellow light at trail on Proton - I always stop but nobody else does - someone is going to be hurt badly
- Specifically, public transit and bicycle paths
- With all the construction going on, traffic must be addressed

#### Events/Night Life/Community Amenities

- Ban smoking in bars
- More family events as well as nightlife
- Live music venues, such as a jazz bar or something is needed
- Pickleball
- Add a dog park to Addison Circle
- Playgrounds
- Its athletic club
- Bring an Eatzi's to Addison Circle

#### Housing

- More housing, not multi-family
- More permanent residences and less apartments
- Less apartments
- It's commitment to providing affordable housing options for all incomes
- Addison must readopt it's roots in being a leader in mixed use, connected developments with office, F&B, and housing. Projects like the Quorum and one-off, isolated office buildings are no longer attractive to the Millennial generation. Addison must support and promote re-positioning of it's office assets to compete with Frisco, Plano, Galleria, Mid-Town, etc.

#### Community Culture

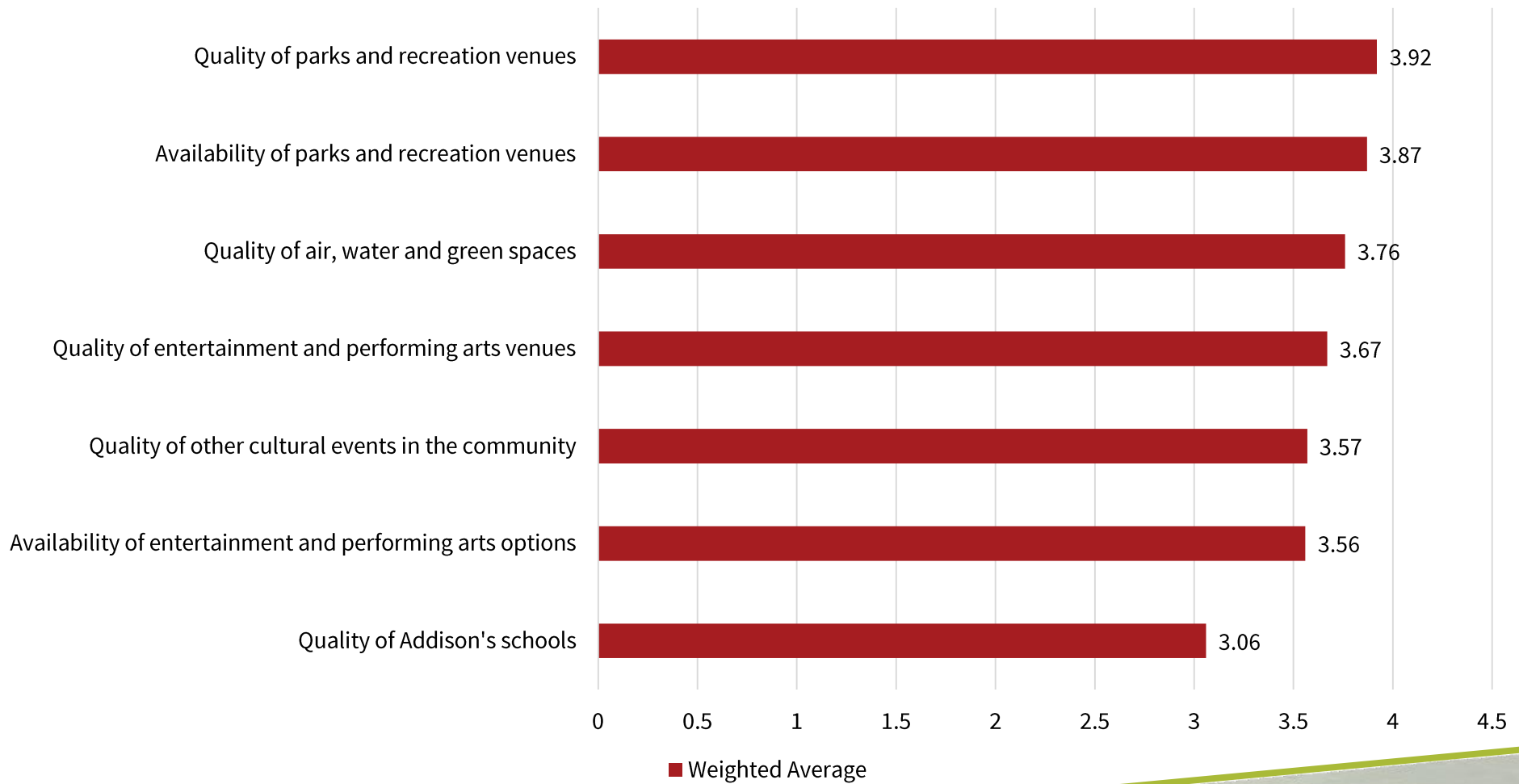
- Community spirit; connectivity across resources; how schools are perceived (they are better than people think they are)
- Better branding and positive public relations
- New slate of city council that are independent thinkers
- Continue good government and restoration of its reputation

# Community Survey Responses

## ALL RESPONDENTS

### PLEASE EVALUATE THE QUALITY AND AVAILABILITY OF ADDISON'S AMENITIES.

*The quality of parks and recreation venues was rated the highest within the Town of Addison, while the quality of Addison's schools was rated lowest. The following slides show the breakdown of the ratings for each amenity.*



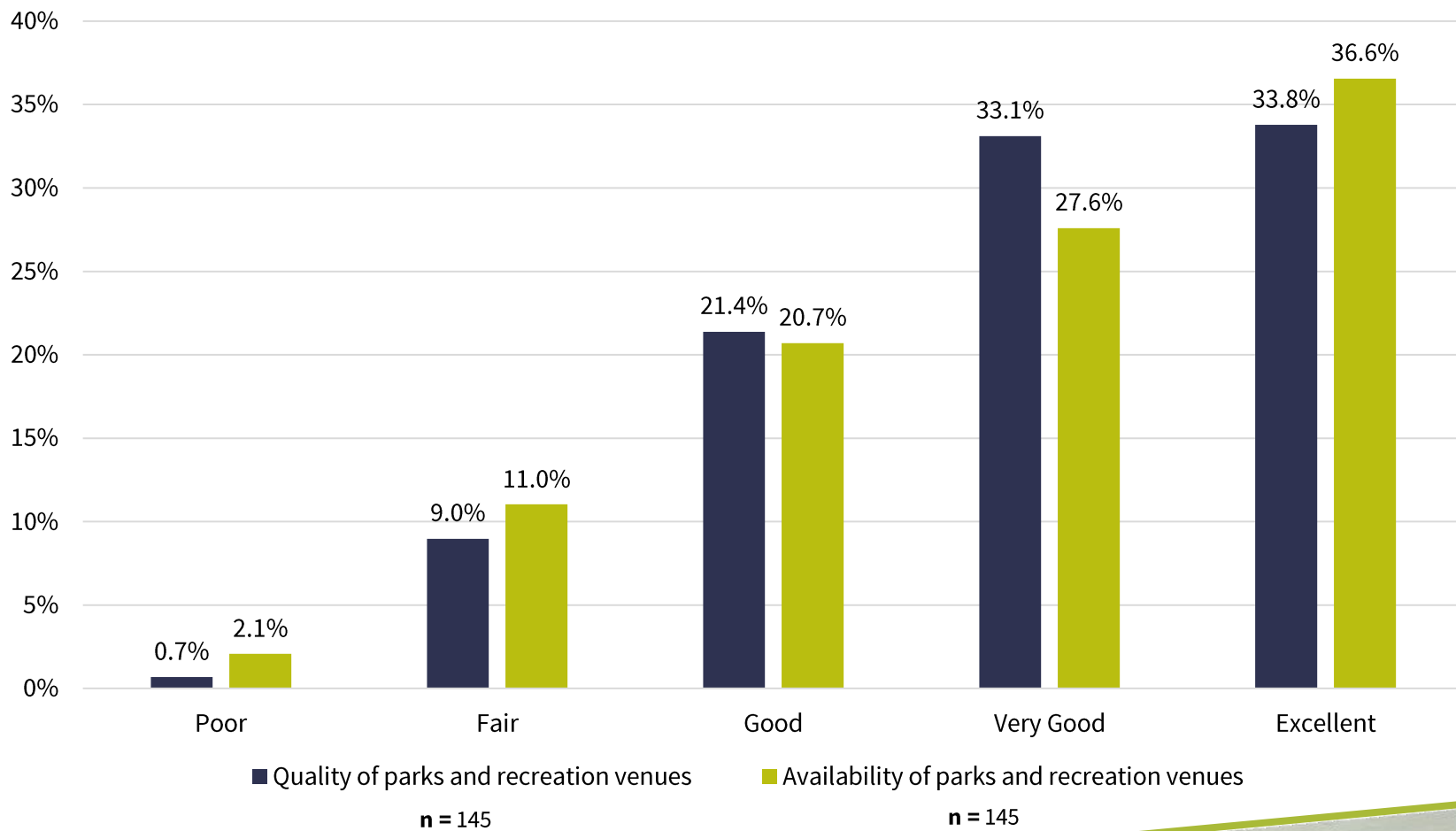


# Community Survey Responses

## ALL RESPONDENTS

**PLEASE EVALUATE THE QUALITY AND AVAILABILITY OF ADDISON'S PARKS AND RECREATION VENUES.**

*Respondents rated quality of parks and recreation venues an average 3.92 out of 5, while availability of parks and recreation venues was rated an average 3.87 out of 5.*

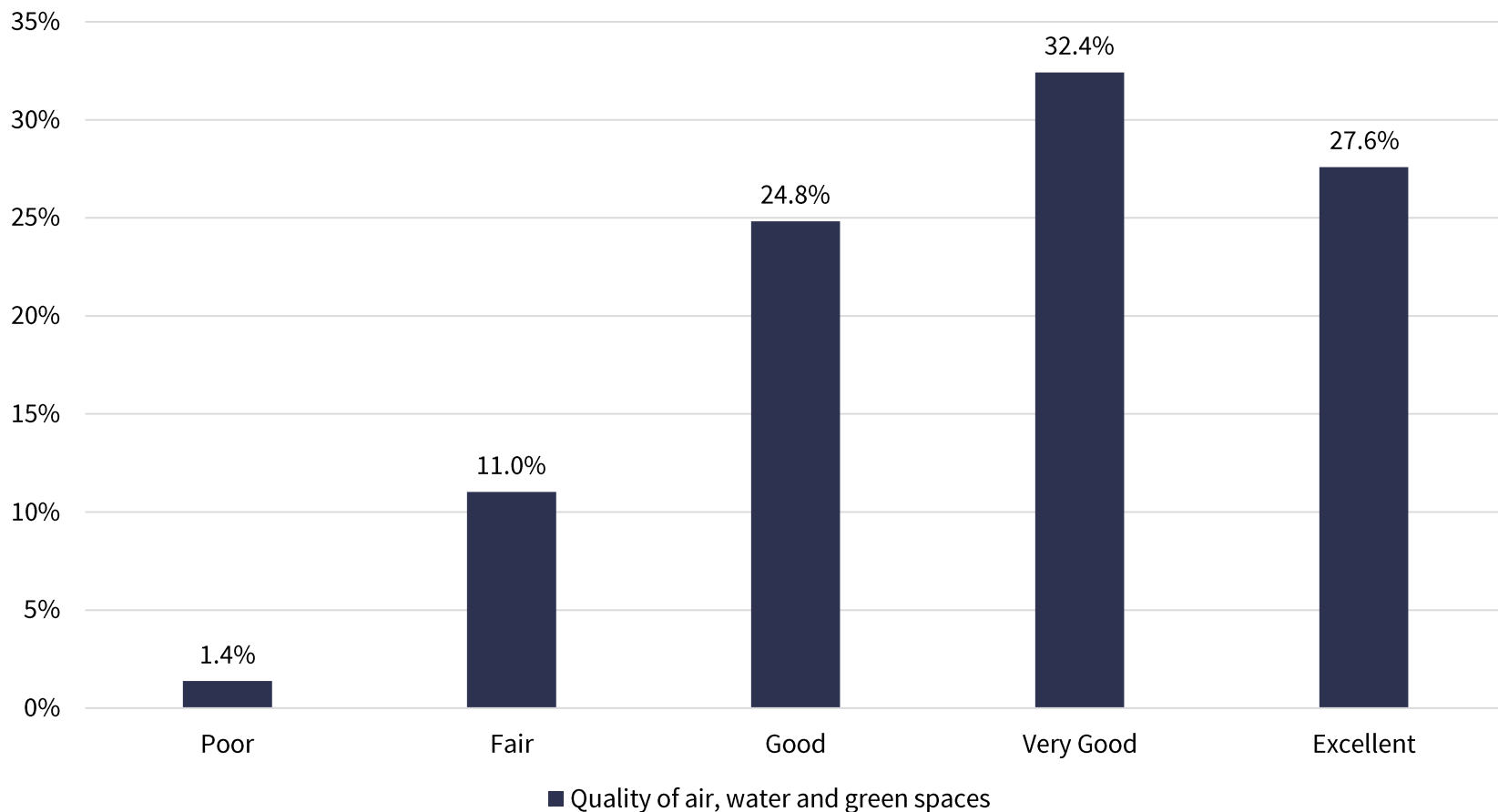


# Community Survey Responses

## ALL RESPONDENTS

PLEASE EVALUATE THE QUALITY OF AIR, WATER AND GREEN SPACES IN ADDISON.

*The quality of air, water and green spaces was most rated very good, with a weighted average rating of 3.76 out of 5.*



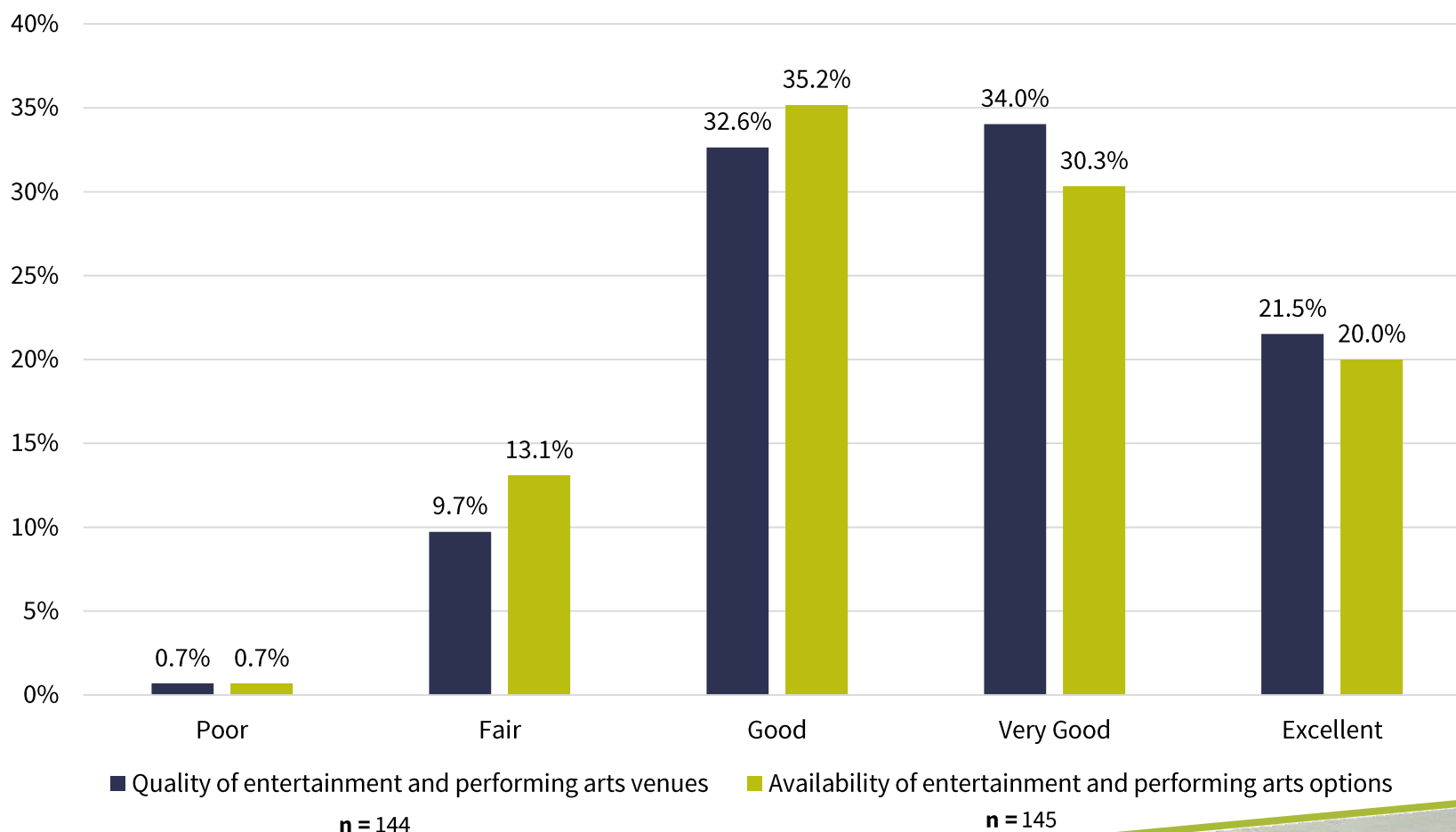
n = 145

# Community Survey Responses

## ALL RESPONDENTS

### PLEASE EVALUATE THE QUALITY OF ENTERTAINMENT AND PERFORMING ARTS VENUES IN ADDISON.

Respondents rated quality of entertainment and performing arts venues an average 3.67 out of 5, while availability of entertainment and performing arts options was rated an average 3.56 out of 5.

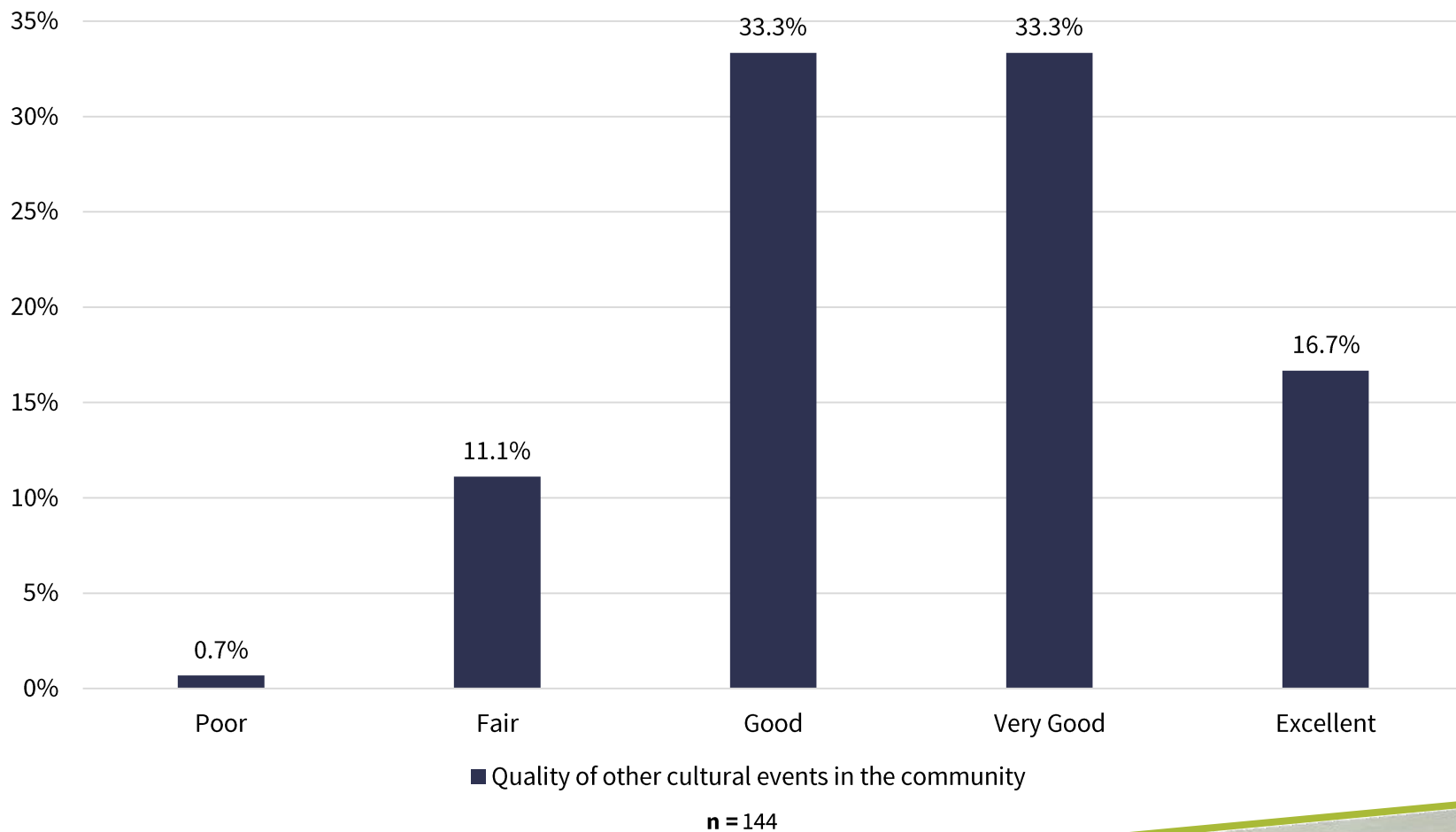


# Community Survey Responses

## ALL RESPONDENTS

**PLEASE EVALUATE THE QUALITY OF OTHER CULTURAL EVENTS IN ADDISON.**

*The quality of other cultural events in the community was most rated good to very good, with a weighted average rating of 3.57 out of 5.*

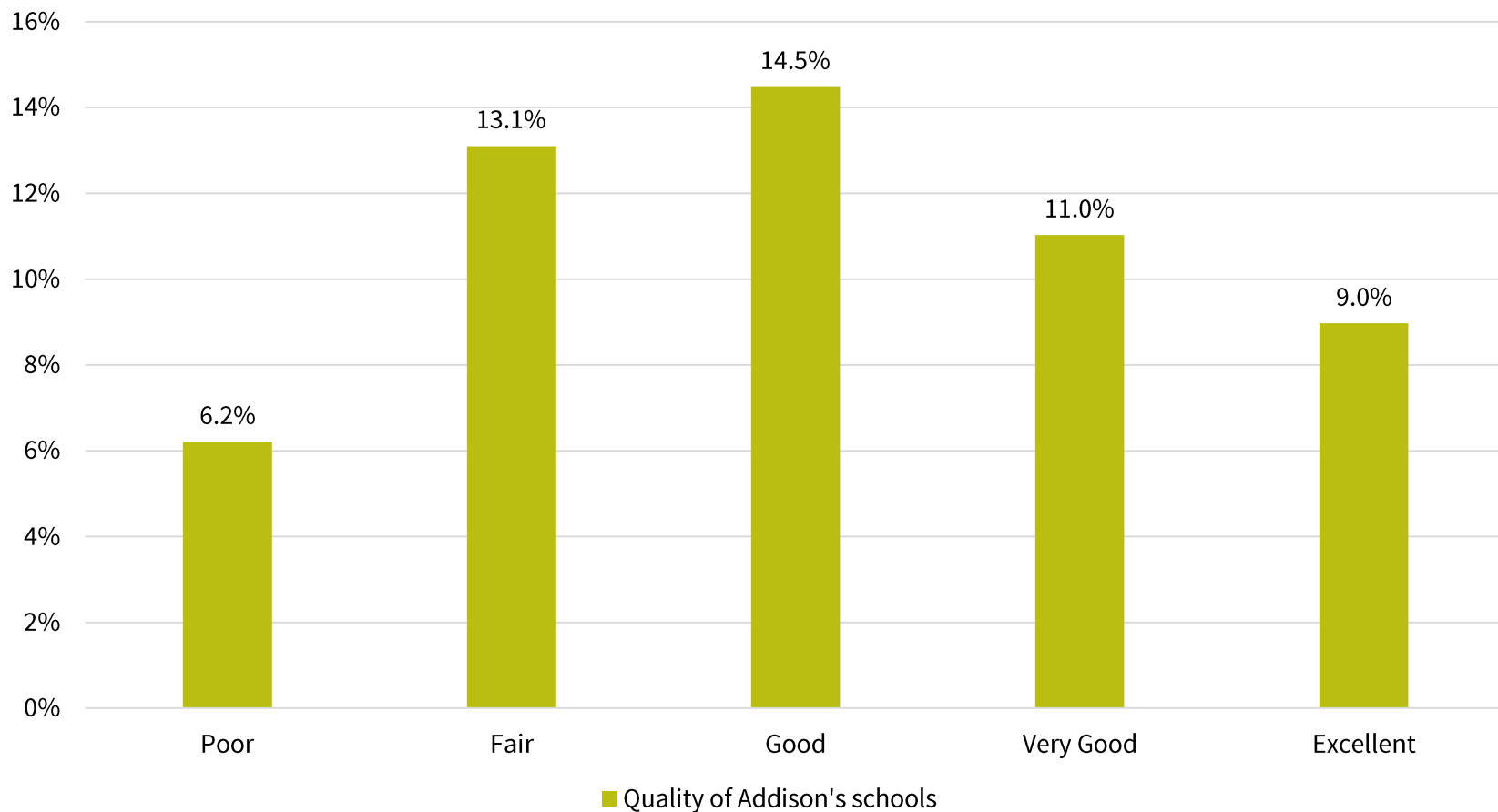


# Community Survey Responses

## ALL RESPONDENTS

PLEASE EVALUATE THE QUALITY OF ADDISON'S SCHOOLS.

*The quality of Addison's schools was most rated good, with a weighted average rating of 3.06 out of 5.*



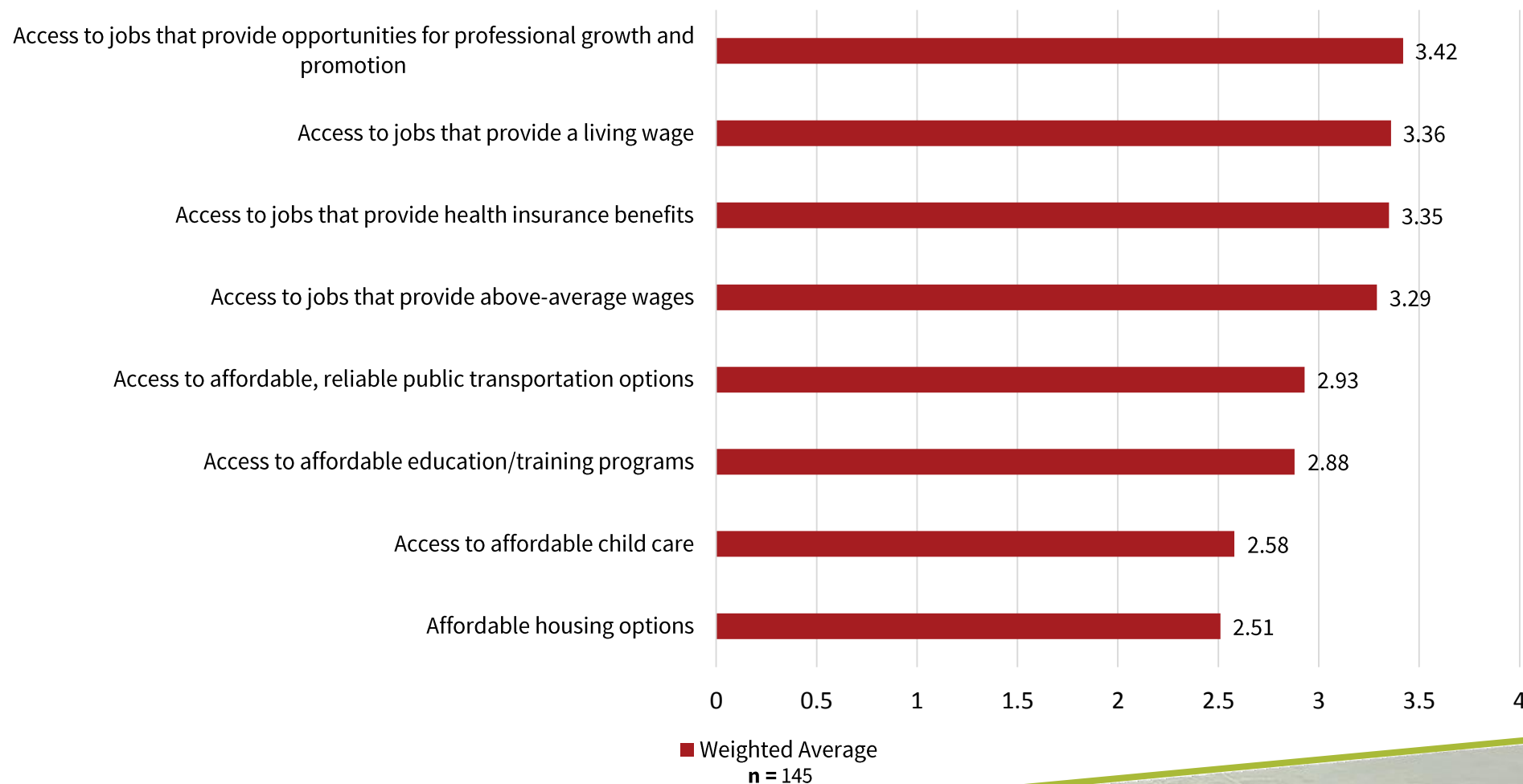
n = 145

# Community Survey Responses

## ALL RESPONDENTS

**THE ABILITY FOR LOCAL WORKERS AND FAMILIES TO FIND QUALITY EMPLOYMENT AND BUILD PERSONAL WEALTH IS VERY IMPORTANT. PLEASE RATE HOW WELL YOU BELIEVE ADDISON PROVIDES THE FOLLOWING:**

*Access to jobs that provide opportunities for professional growth and promotions was rated highest, with a weighted average rating of 3.42 out of 5.*



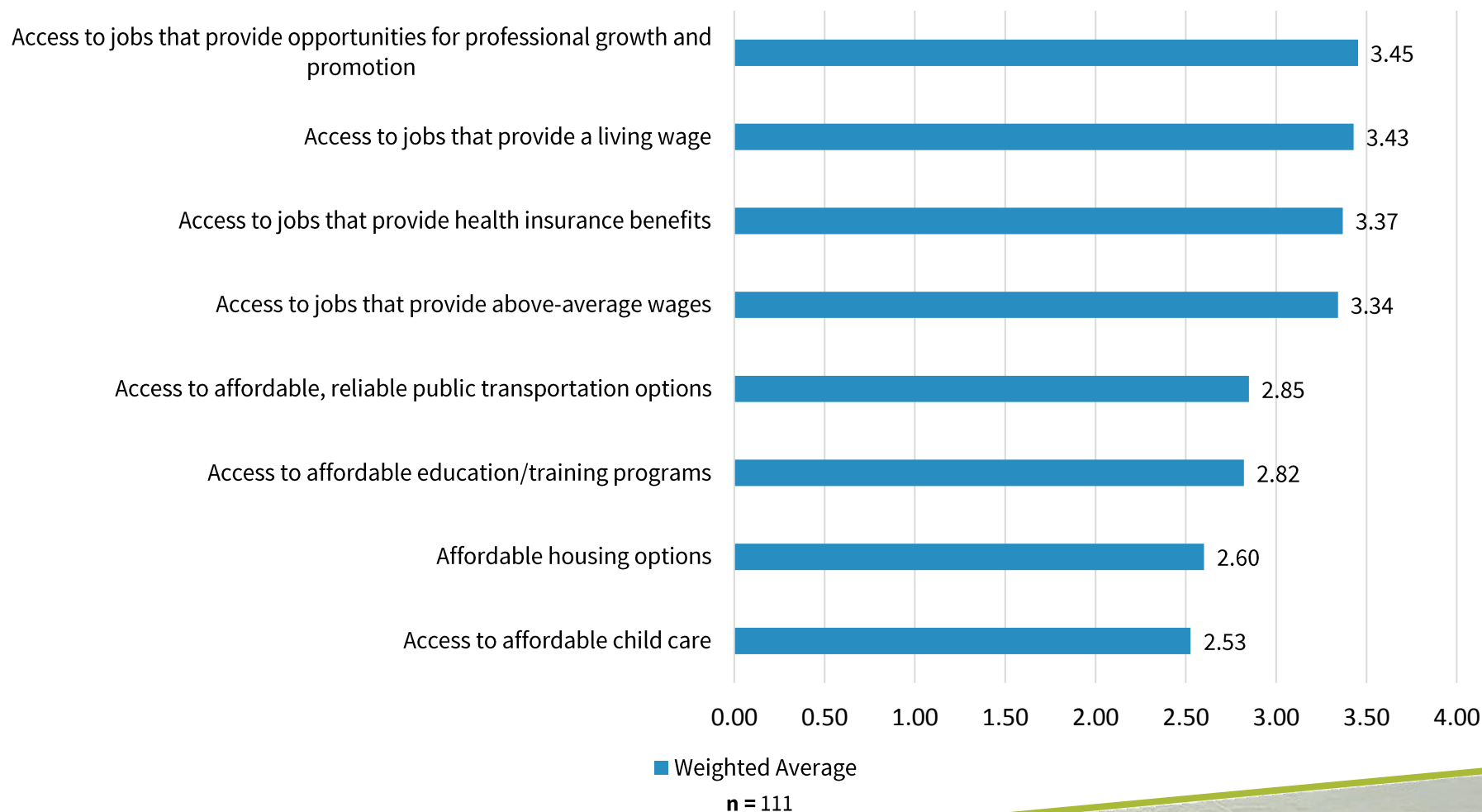


# Community Survey Responses

## RESIDENTS

**THE ABILITY FOR LOCAL WORKERS AND FAMILIES TO FIND QUALITY EMPLOYMENT AND BUILD PERSONAL WEALTH IS VERY IMPORTANT. PLEASE RATE HOW WELL YOU BELIEVE ADDISON PROVIDES THE FOLLOWING:**

*Access to jobs that provide opportunities for professional growth and promotions was rated highest, with a weighted average rating of 3.45 out of 5.*

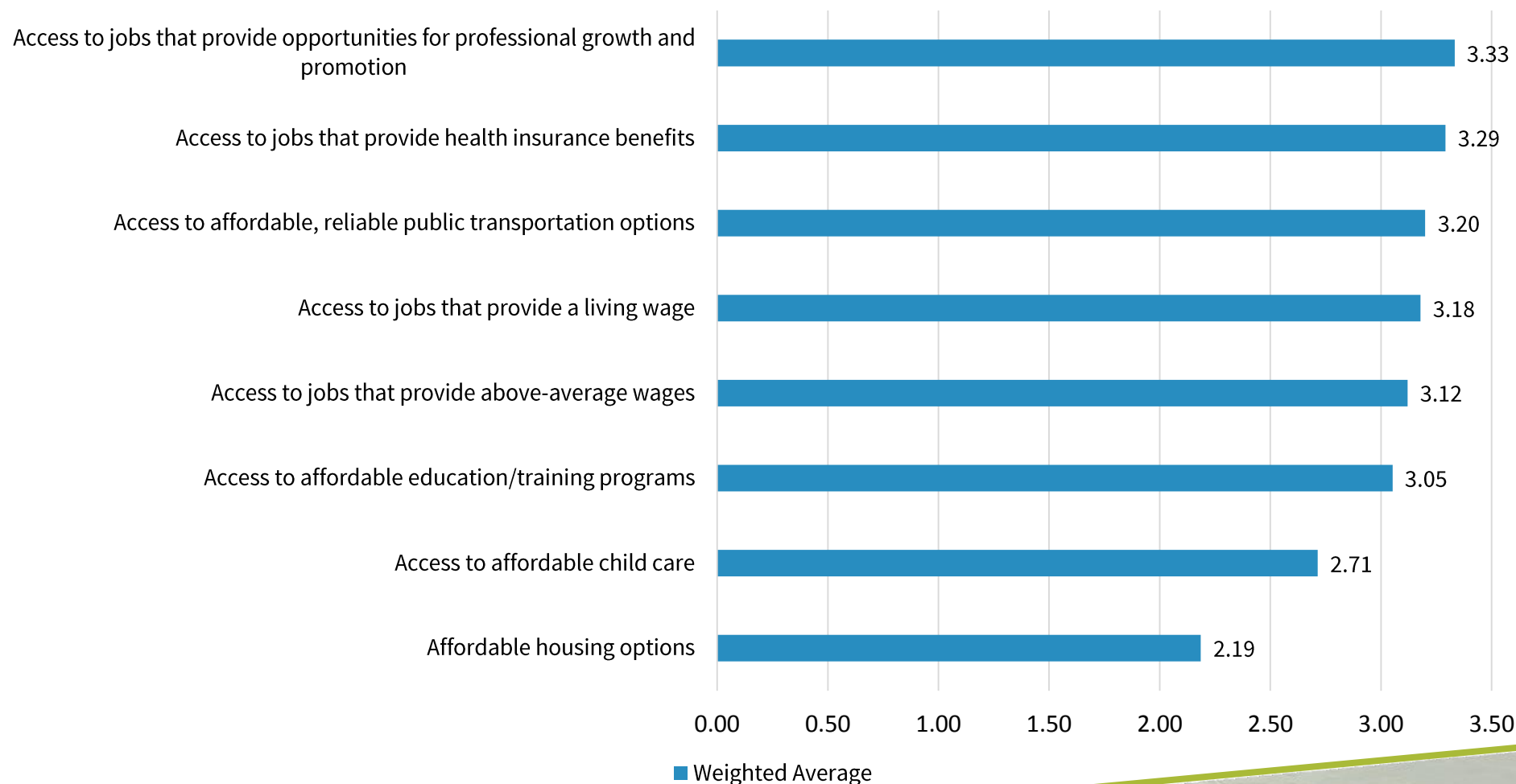


# Community Survey Responses

## NON-RESIDENTS

**THE ABILITY FOR LOCAL WORKERS AND FAMILIES TO FIND QUALITY EMPLOYMENT AND BUILD PERSONAL WEALTH IS VERY IMPORTANT. PLEASE RATE HOW WELL YOU BELIEVE ADDISON PROVIDES THE FOLLOWING:**

*Access to jobs that provide opportunities for professional growth and promotions was rated highest, with a weighted average rating of 3.33 out of 5.*



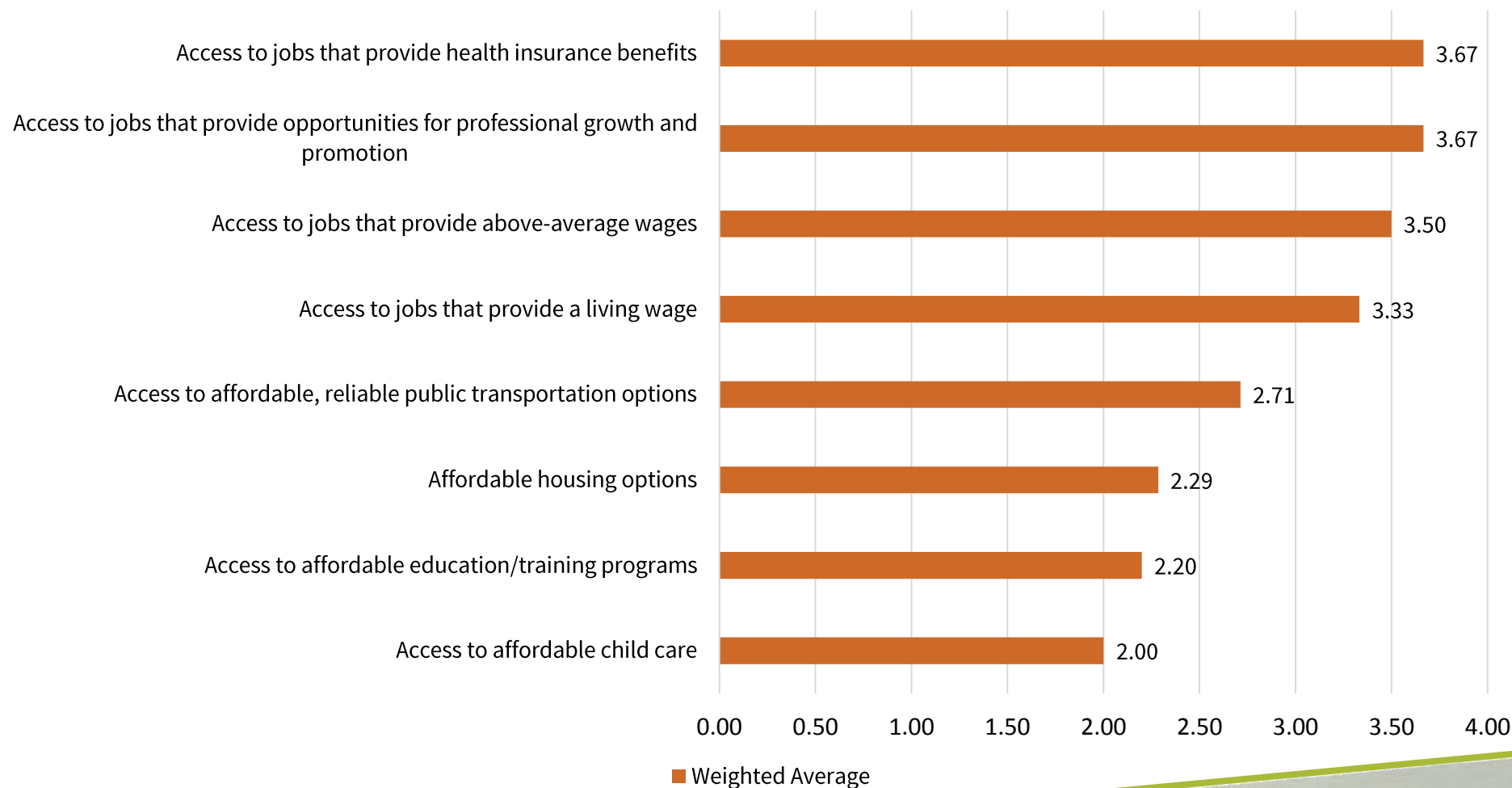
n = 34

# Community Survey Responses

## ALL BUSINESS OWNERS

**THE ABILITY FOR LOCAL WORKERS AND FAMILIES TO FIND QUALITY EMPLOYMENT AND BUILD PERSONAL WEALTH IS VERY IMPORTANT. PLEASE RATE HOW WELL YOU BELIEVE ADDISON PROVIDES THE FOLLOWING:**

*Access to jobs that provide health insurance benefits was rated highest, with a weighted average rating of 3.67 out of 5.*



n = 7

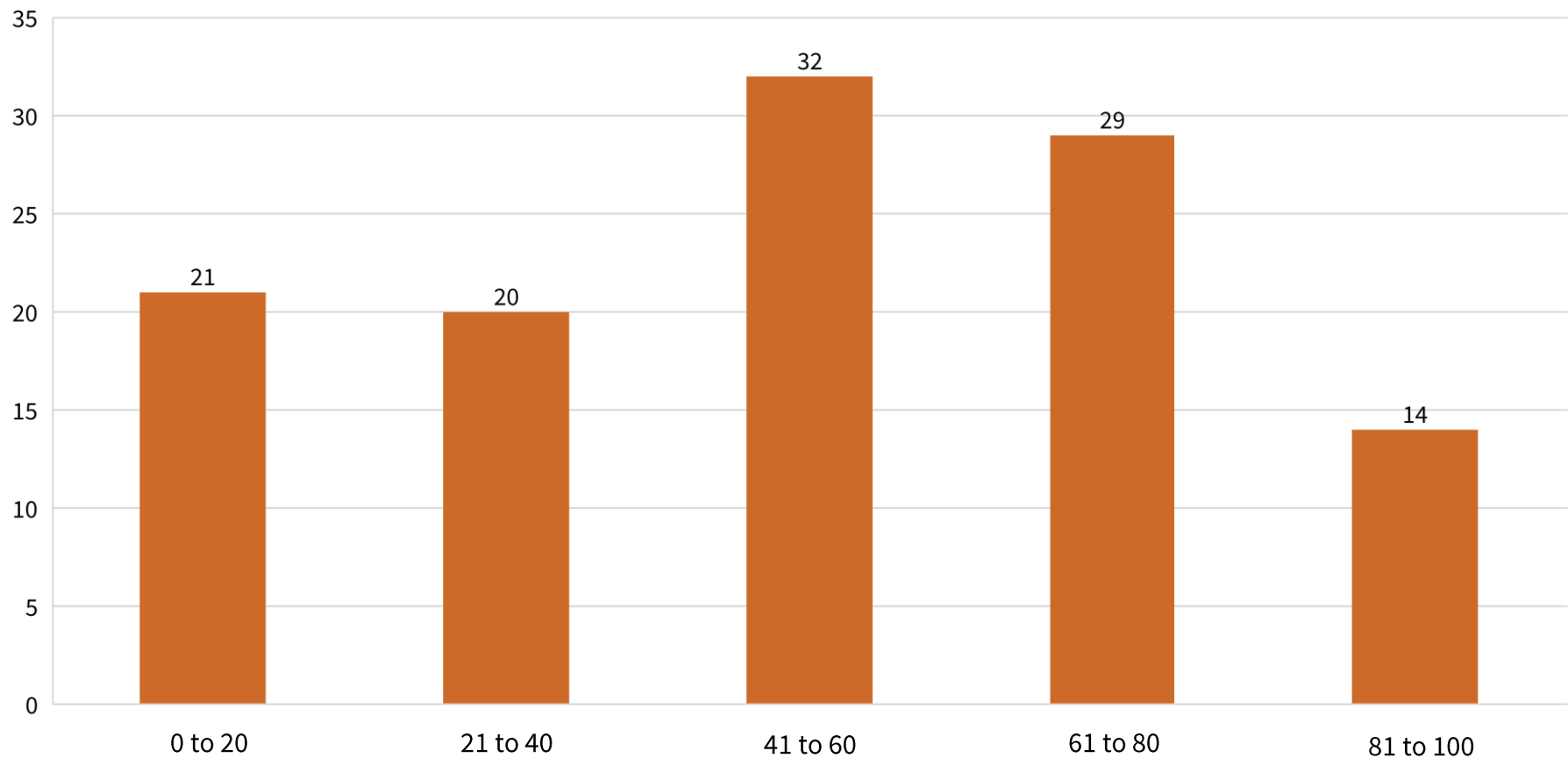


# Community Survey Responses

## ALL RESPONDENTS

### HOW WOULD YOU RATE YOUR LEVEL OF ENGAGEMENT IN THE COMMUNITY?

Respondents rated their level of engagement an average of 51%, with 0 being the lowest and 100 being the highest levels of engagement reported. A histogram of the responses is shown below.



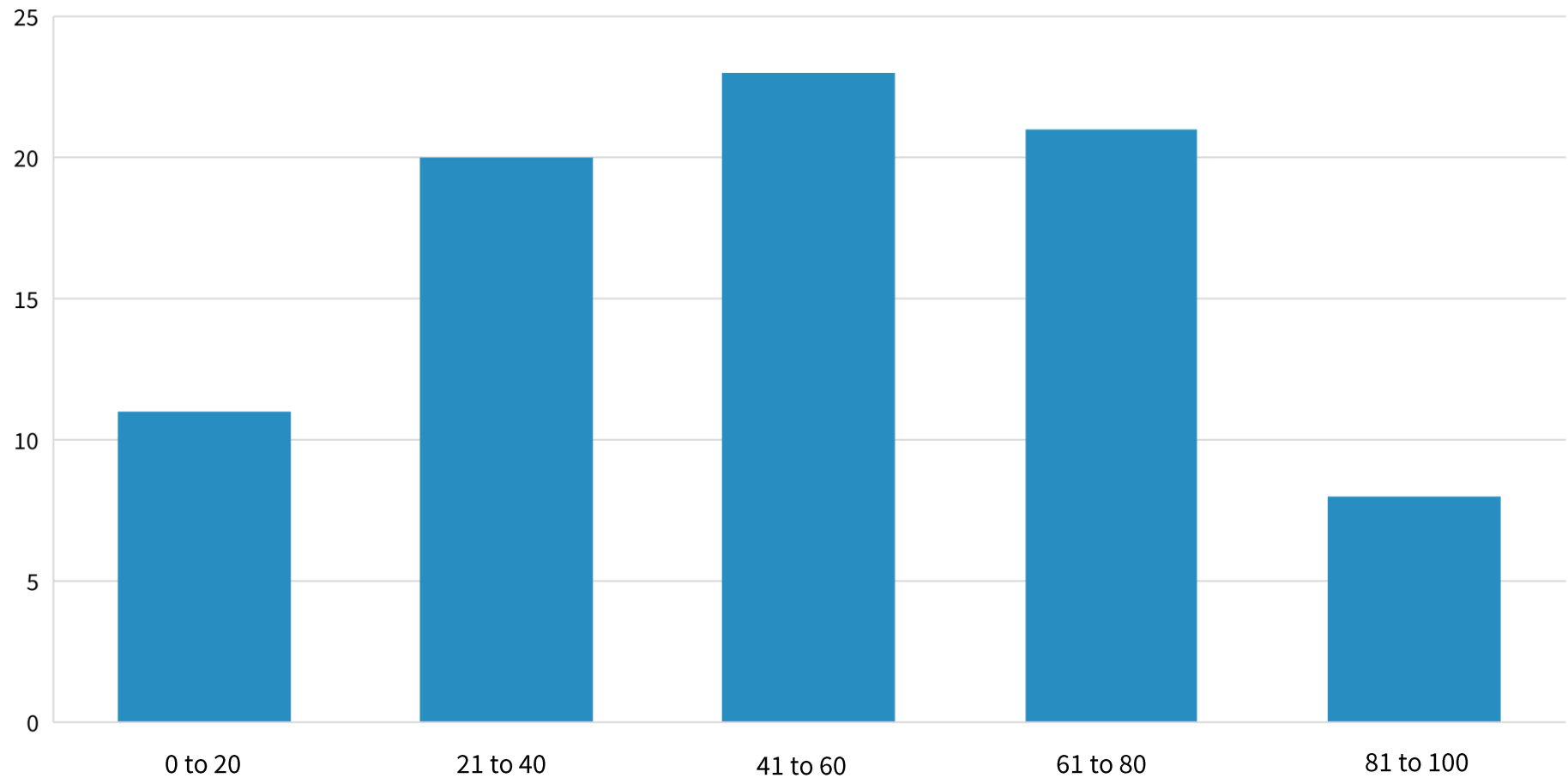
n = 116

# Community Survey Responses

## RESIDENTS

### HOW WOULD YOU RATE YOUR LEVEL OF ENGAGEMENT IN THE COMMUNITY?

Residents rated their level of engagement an average of 51.5%, with 0 being the lowest and 100 being the highest levels of engagement reported. A histogram of the responses is shown below.



n = 83



# Community Survey Responses

## ALL RESPONDENTS

### WHAT WOULD HELP INCREASE YOUR LEVEL OF ENGAGEMENT IN THE COMMUNITY (E.G., NETWORKING GROUPS, COMMUNITY EVENTS, NEWSLETTERS, ETC.)?

*Most respondents noted holding more community events, networking opportunities, and better communication about where events/meetings are held and how to get involved. The list of responses (with the number of respondents noted behind some items in parentheses) is below: n = 81*

#### More events

- Community Events, including events for young adults (28)
- Actual fun opportunities
- Athletic connections (running events, walking clubs, classes at the Athletic Center, etc.) (3)
- More local businesses at special events and in the area, not as many corporate businesses

#### Better communication

- Networking opportunities, including community meeting areas and retail areas for impromptu connections (13)
- Newsletters (18)
- E-mail, social media and direct communication to let people know where and how to get involved (including arts and cultural events) (11)
- Evening and weekend meetings, social activities, coffee with the mayor, and other Town activities so a more diverse group can attend (5)
- Community groups, Citizen's Advisory Boards and Idea groups (4)
- No more politically motivated newsletters
- The Town does a good job keeping people informed
- Have a city council that listens to residents instead of developers of multi family dwellings - i.e. apartments
- The City Manager's weekly updates keeps people informed. I attend/watch the Council meetings. I see no reason for the ED breakfasts. The info is available if people read the CM newsletters/ Council meetings. I think the ED staff can spend that "breakfast time" in more beneficial ways
- The former mayor got so many of us opposed to him involved in the community and as long as he's still here and promoting his brand of hate, we'll still be involved

#### Better amenities

- Transportation, parking options and traffic improvements (3)
- Dog parks (2)
- Better shops and restaurants in the circle. A community pool for the townhomes
- Better schools

#### Other responses:

- Don't know (4)
- Health issues getting in the way
- When I retire
- Simply ask
- Love what you are doing. Keep it up
- I'm pretty busy working for a living and already volunteer in regional stuff so I'm not looking another opportunity to engage locally

# Section 5: Assessment of Zoning, Land Use, Infrastructure and Mobility

# Assessment of Zoning, Land Use, Infrastructure and Mobility

## INTRODUCTION

Addison, at only 4.4 square miles, has significant strengths to build upon to foster the type of physical form and environment, complemented by appropriate infrastructure and mobility options, that promotes Place-Based Economic Development. Within the Town, there are a series of individual places, districts and neighborhoods that provide a wide array of options for residential, recreational and worktime activity. Each distinct neighborhood offers a unique atmosphere, contributing to a varied array of lifestyle choices and business investment and operations opportunities. However, these offerings are often insular and isolated physically due to physical impediments (including infrastructure, busy street sections etc.). This disconnected fabric prevents the Town, its residents and the business community from unleashing the true value of these exceptional places, which when taken as a whole, are even greater than the sum of their individual parts.

The compact nature of the Town provides the opportunity to provide greater connectivity between and among these pockets of commercial activity, bedroom and residential communities and existing/future hubs of entertainment and culture. To accomplish these goals, there must be an evaluation of land use at the local level and Town wide, ideally undertaken in conjunction with examining physical infrastructure such as roadway networks, pedestrian improvements, transportation related infrastructure and mobility options, in addition to a review of associated policies that relate to place and economic viability.





# Assessment of Zoning, Land Use, Infrastructure and Mobility

## INTRODUCTION

Finally, it is essential to recognize the value of existing bedroom communities and neighborhoods. While the one constant in life is change, the reality is by utilizing appropriate policies, the market for growth can be harnessed in a manner that directs that change to achieve specific desired outcomes. As such, it is important to protect and preserve those aspects of neighborhood life that wish to be maintained, recognizing that remaining stagnant and not allowing any growth (including appropriately calibrated growth adjacent to, or even within, traditional bedroom communities). By considering the place-based aspects of economic development, we can look to enhance and improve existing communities, while fostering growth and the evolution of targeted areas and districts in a manner whereby current residents, employers and workers within the Town are ensured of an even greater quality of life and local environment for the years to come.



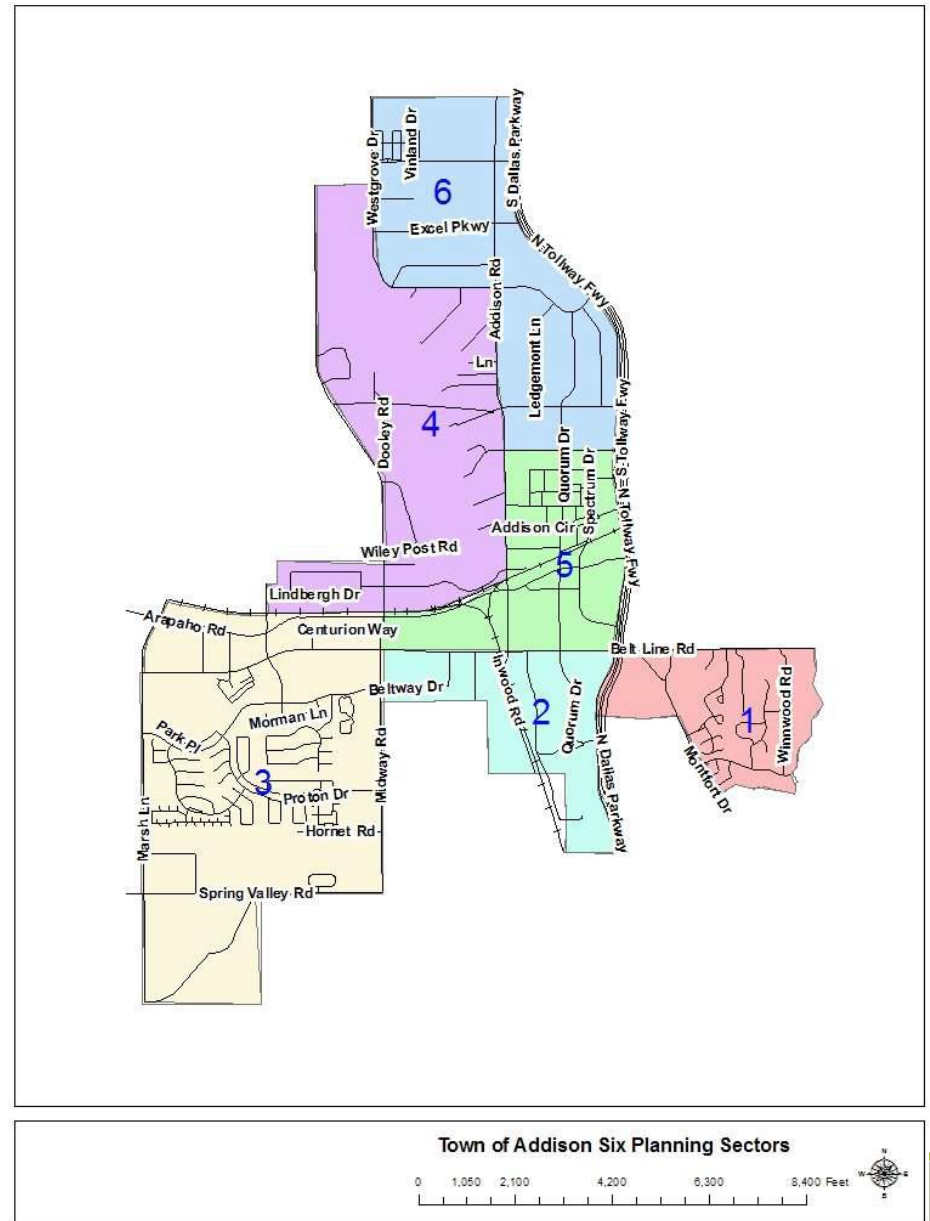
# Assessment of Zoning, Land Use, and Infrastructure

## AREAS OF FOCUS

Over the course of a week that consisted of multiple site tours around the Town, in addition to the compilation of information gathered at focus groups and one-on-one interviews, the team compiled information on different areas of the Town. To maintain consistency with past and ongoing planning efforts, we will provide our findings broken down into the six sectors as delineated in the Town's 2013 Comprehensive Plan.

These areas of focus include:

- **Sector 1:** Areas to the East of the Tollway.
- **Sector 2:** Boundaries are the Tollway to the east, Midway Rd to the West, and Belt Line Rd to the North.
- **Sector 3:** Boundaries are Midway Rd to the East, Marsh Rd. to the West and the train tracks to the North
- **Sector 4:** Boundaries are Addison Rd to the East (up to Westgrove, there the boundary then shifts to Westgrove) and the train tracks to the south
- **Sector 5:** Boundaries are the Tollway to the east, Belt Line Rd to the south, Midway Rd. as the Western boundary from Belt Line Rd. to the Train Tracks and Addison Road as the Western boundary north of the train tracks.
- **Sector 6:** Boundaries are the Tollway to the East, Addison Road to the West up to Westgrove, where the boundary becomes Westgrove.



# Assessment of Zoning, Land Use, and Infrastructure

## SECTOR 1: Areas to the East of the Tollway

### OVERVIEW

This sector is relatively mature in terms of the built environment, with opportunities for transition and evolution into the future. Due to its location, it plays more of a supportive role to advance the overall economic development strategy rather than a direct area of focus, especially in regard to the high value bedroom communities that make up a majority of the land area. However, it should be noted that the provision of better connectivity (though infrastructure and the provision of mobility services such as a shuttle, or emerging technologies and services including ride-sharing and automated vehicles) would provide benefits in terms of retaining daytime population into the evening and capturing additional daytime business from employees that work in and around Addison – two goals that were stated throughout our interviews and research.

### BUILT ENVIRONMENT, MIX OF USES, ZONING CODES, HOUSING OPTIONS

This Sector consists of Belt Line Road as its Northern boundary, with a series of primarily single family residential neighborhoods to the south. The residential fabric is largely built out, located adjacent to a number of retail and restaurant offerings along Belt Line Road. Zoning along Belt Line Road consists primarily of PD and Local Retail with land use patterns consisting of lower density, auto-oriented commercial and retail. This area provides a range of destination shopping and dining, including the well-received “Village on the Parkway” redevelopment.



# Assessment of Zoning, Land Use, and Infrastructure

## SECTOR 1: Areas to the East of the Tollway (continued)

### INFRASTRUCTURE

Road infrastructure is oriented toward the automobile, primarily designed to serve the commercial uses along Belt Line Rd, and the adjacent single family home neighborhoods to the south. There was a stated desire to provide better connectivity and walkability to service those neighborhoods, during our interviews and stakeholder sessions. The area lacks connective infrastructure to promote greater walkability and foster other mobility options (i.e. biking, micro mobility and emerging technologies), especially in regard to physical connections to the residential neighborhoods south of Belt Line along with more pedestrian related infrastructure along Belt Line.

A number of residents discussed the need to provide better connectivity from/to this sector to areas west. The primary impediment to achieving this aim is the Tollway, which creates a significant physical barrier to achieve this aim. There is a lack of enhancements and infrastructure to create a more pedestrian friendly environment, such as pedestrian treatments, bike-related infrastructure landscaping and activation. Some residents were supportive of capping the highway with a “Klyde Warren Park” type deck park to provide connectivity, although such an effort would require significant investment.

Providing additional infrastructure to enhance walkability and other mobility options would create a more woven fabric whereby the Tollway does not become such a segregating factor, but rather a hinge between points east and west could go a long way to meet these goals.

# Assessment of Zoning, Land Use, and Infrastructure

## SECTOR 2: Boundaries are the Tollway to the East, Midway Rd to the West, and Belt Line Road to the North

### OVERVIEW

In terms of this report's focus on economic development, our team focused on the Inwood road area of this sector, along with Belt Line Rd (which is a binding agent for the Town, which crosses a number of sectors). Historically, Inwood's economic base, and subsequent land uses and built environment, evolved as a center of commerce for liquor stores, in a time when surrounding communities remained dry. Today, this monopoly no longer exists, resulting in all but a select few legacy stores having shut down. With that as background, the area provides a relative blank slate whereby creative land use, zoning and economic development initiatives could take place, within the context of limitations (i.e. Height limitations and inability to build residential in most of the district) of the airport. The area's proximity to the airport provides opportunities to leverage the evolution of this sector in the context of aviation-oriented development and economic development priorities.

### BUILT ENVIRONMENT, MIX OF USES, ZONING CODES, HOUSING OPTIONS

This sector is comprised almost exclusively of low density, auto-oriented retail, with the presence of a number of deteriorated buildings and vacant properties.

In regard to zoning, the Inwood area is currently zoned as Industrial, Commercial 1, 2, and Local Retail. However, it is less important to focus upon what "is" and more important to consider what tweaks and changes will be necessary to support the findings of the economic development component of this study, and other goals and objectives of the Town. With significant limitations on height, and restrictions/prohibitions on most residential uses (as a result of proximity to the airport and FAA regulations) traditional approaches for place-based economic development are limited, as the desire for integrated, walkable and mixed-use districts that include a significant residential component are simply not on the table. The Town recently completed a land use and planning study of this area led by Gensler, which should provide guidance in accordance with the economic development recommendations set forth in this overall report.

In terms of this report and the focus on economic development, the proximity of this sector to Belt Line Road and, especially, the airport to the north, provides a unique characteristic and asset that could promote uses that complement aviation related businesses. In addition, a number of residents expressed the desire to see more entertainment options and venues, which could be supported in this location due to the ability to provide larger event space and its proximity to Belt Line Road, and, from a regional perspective, the Tollway, which is a few minutes' drive to the east.

Housing in this area is limited due to its proximity to the airport and location within the flight path, and is constrained if not prohibited due to FAA regulations.

# Assessment of Zoning, Land Use, and Infrastructure

## SECTOR 2: Boundaries are the Tollway to the East, Midway Rd to the West, and Belt Line Road to the North

### INFRASTRUCTURE

Like much of the area of Town that is within close proximity to Belt Line Road, infrastructure in this area is heavily oriented toward the automobile. There is a lack of pedestrian connections and other mobility related infrastructure. These items were not necessary to promote business and/or economic development in the past, but have become important assets to meet the needs of today's workforce. Such emphasis on pedestrian-related infrastructure is an important consideration both along Belt Line Road and along Inwood Road, the latter having been studied by the Town in partnership with Gensler, to guide future infrastructure investment decisions. That said, this section of Belt Way appears to have strong viability for a range of retail and restaurant uses, although it should be noted that a shift in the retail environment is occurring from larger footprints and big boxes to smaller locations with more of an experiential component. This is in comparison to the section of Belt Line Road, west of Midway, where the existing infrastructure may be an impediment to fostering appropriate land uses (and, as noted in our Sector 3 write up, the development of projects such as Addison Grove address many of these issues).

# Assessment of Zoning, Land Use, and Infrastructure

## SECTOR 3: Boundaries are Midway Rd to the East, Marsh Rd. to the West and the train tracks to the North

### OVERVIEW

In terms of economic development analysis, the two primary areas of focus within this sector are Belt Line Road and the areas at and adjacent to the Vitruvian development. The former has an opportunity for evolution and change that could foster the economic development goals set forth by this overall report, while the latter is well on its way to providing benefits that include quality new multifamily residential options and a range of amenities for local residents, employees and visitors.

### BUILT ENVIRONMENT, MIX OF USES, ZONING CODES, HOUSING OPTIONS

Along Belt Line Road, a series of commercial and retail uses exists, guided by zoning oriented toward retail and commercial. It is important to note the Town's recognition of the need for a mix of uses and introduction of residential as a driver for economic development and quality of life, as is evidenced by Addison Grove mixed-used development, under the auspices of PD zoning. This could serve as a model for the evolution of other areas along Belt Line Road both within and outside of this sector.

The southern portion of this sector has witnessed an evolution from 70's and 80's garden style apartments to more intensive, mixed-use development, as is evidenced by the well-received Vitruvian development. The quality multifamily residential component, complemented by a mix of uses including retail on the ground floor is well suited to the needs of young professionals and empty nesters, serving as a key point of advantage for the Town in fostering economic development by tending to the needs of the talented workforce that desires such environments.

That said, the aging stock of garden style apartments do serve a need in regard to the provision of naturally occurring (i.e. non-subsidized) affordable and workforce housing, which is a considering for the Town as these neighborhoods evolve and future phases of development take place.

In addition, there may be need to examine how to best support the large scale public events that are held in this area, as development has and will reduce the availability of parking for large influxes of crowds from other areas.

# Assessment of Zoning, Land Use, and Infrastructure

## SECTOR 3: Boundaries are Midway Rd to the East, Marsh Rd. to the West and the train tracks to the North

### INFRASTRUCTURE

Much like the rest of Belt Line Road, the area is focused almost exclusively on auto-oriented infrastructure. Understanding the high volume of traffic that traverses Belt Line Road, there may be limitations on a complete transformation and/or refocus on the physical construct of Belt Line Road. Perhaps more important than the lack of walkability east-west along Belt Line Road is the segregating nature of the roadway that provides a significant impediment to connecting areas to the north with areas to the south. The lack of pedestrian amenities, including shelters from the sun/inclement weather, pocket parks and the ability to safely cross Belt Line Road with a focus on a positive pedestrian experience is an impediment to economic development. The Town has undertaken considerable investment in burying powerlines along Belt Line, which is a key first step toward improving the aesthetic component, if not the functionality, of this essential road in its role to serve automobile and, potentially, pedestrian, traffic in the future.

New development at the Vitruvian has brought with it significant investments in infrastructure, providing walkability and connectivity within that area. The relationship of the buildings to the streets and public realm provide a friendly environment for walking (and driving, for that matter), while the larger public spaces provide significant amenities for local residents, employees and visitors. There were comments provided during the interviews about concerns over parking for large events and gatherings in the area, as current locations for parking are likely to be developed in the future.



# Assessment of Zoning, Land Use, and Infrastructure

**SECTOR 4:** Boundaries are Addison Rd to the East (up to Westgrove, there the boundary then shifts to Westgrove) and the train tracks to the south

## OVERVIEW

For the purpose of economic development, this report focused on the presence of the Airport and surrounding environment. The Airport is a significant amenity and driver of economic development that provides a number of advantages from an economic development perspective. In addition to the unique nature of this airport as an alternative not found in most locales, provides opportunity to leverage “aviation oriented” development to serve the needs of economic growth and the desires of local community members.

## BUILT ENVIRONMENT, MIX OF USES, ZONING CODES, HOUSING OPTIONS

The areas adjacent to the Airport are, by and large, set in terms of use and built environment. However, there may be some opportunities to better leverage the airport as an economic development tool, while fostering economic growth adjacent to the airport, and to areas south, such as Inwood Rd.

To a large degree, the Airport is a “hidden gem” both physically, and mentally. The area is currently zoned as Industrial 3 or PD, serving aviation and commercial uses. Comments from our interviews and stakeholder sessions suggested that there is a lack of way signage and promotion of the airport (“out of sight, out of mind”). That said, it is apparent that the airport drives commercial investment and development, with the presence of aviation related business that then give way to more general commercial and office uses.

The area is low in density and auto-oriented, serving the needs of the airport and surrounding commercial uses. Through interviews, residents and stakeholders did discuss the desire to see a more publicly oriented range of uses, either on the airport proper or surrounding it. These included the concepts of a restaurant and/or event space that would leverage the airport as a driver, including the ability to watch aviation related-activity while enjoying food and/or entertainment options.

## INFRASTRUCTURE

While there is a lack of walkability and infrastructure to support multi-modal uses, this area is heavily dependent upon the presence of the airport in regard to economic development. As such, investment in infrastructure is unlike other areas of Town where the lack of such pedestrian-oriented infrastructure may impede economic development. That said, the portion of this sector along Addison Road as you approach the proposed train station and TOD development area must be viewed differently. Ongoing studies are underway for the investment in rail related infrastructure and surrounding development which, to our knowledge, take these factors into consideration.



# Assessment of Zoning, Land Use, and Infrastructure

SECTOR 5: Boundaries are the Tollway to the east, Belt Line Road to the south, Midway Rd. as the Western boundary from Belt Line Road. to the Train Tracks and Addison Road as the Western boundary north of the train tracks.

This is a critical sector in regard to place-based economic development, with the presence of Addison Circle and its quality neighborhood fabric, complemented by corporate commercial abutting the Tollway and the expected presence of a rail station with surrounding Transit-Oriented Development in the western portion of this sector.

As such, we will examine this sector according to those three separate environments: (1) Addison Circle (2) Train Station / TOD area and (3) Tollway Corridor.

# Assessment of Zoning, Land Use, and Infrastructure

## SECTOR 5: Addison Circle

### OVERVIEW

Addison Circle represents a bridge from Addison's recent past to an even more economically resilient and socially vibrant future. The walkable, neighborhood character and mix of uses found within the Circle is an environment that communities across the country strive to create, especially within the context of providing multifamily and rental opportunities for the well-educated workforce.

### BUILT ENVIRONMENT, MIX OF USES, ZONING CODES, HOUSING OPTIONS

A truly walkable district, Addison Circle is associated with high quality development within a mixed-use, albeit residential focused, neighborhood. Few development and potentially few redevelopment opportunities exist within this built out area of Town. Addison Circle provides high quality neighborhood living, with a vast array of multi-family residential options within a mixed-use environment. The area is currently zoned as an Urban Center District, which promotes walkable development and a mix of uses. Land uses here are generally set, with a focus on a walkable, residential neighborhood environment.

Retail is present at and around the circle proper, and located sparingly elsewhere within areas just adjacent to the circle. While ample parking exists throughout the Circle, there appears to be a consumer impression that it is not readily available. This is likely a result of visitors who are not familiar with a more urban form, expecting large swaths of parking right in front of a business they visit. This may also result from a lack of way signage.

The Circle is within walking distance to significant employment centers, including the Tollway adjacent Platinum Corridor, although our research indicated there has been little capture of these potential economic drivers. A common recommendation/suggestion from our interviews was a stated desire for potential temporary uses, events, food trucks and pop-ups that would serve to attract and retain the daytime population into the evening.

# Assessment of Zoning, Land Use, and Infrastructure

## SECTOR 5: Addison Circle

### INFRASTRUCTURE

At and around Addison Circle, and throughout most of this sector outside of Belt Line Road, significant investment in pedestrian connectivity, walkability and the public realm exists. The larger public spaces to the west of the Circle provide a location for some of the region's most well-known and successful large scale events (including Kaboom Town), with smaller public spaces available for smaller scale and more frequent activity.

That said, there is a lack of pedestrian oriented infrastructure to support connectivity to other areas of town, including south to Belt Line Rd and, even more importantly in terms of economic development and capture, the commercial environment along the Tollway. There is also a lack of activation and activity that would provide a “reason” for people to make the effort to walk from one area of this sector to another.

In short, there is tremendous value in the immediate and long term sense at and around Addison Circle. However, a lack of connective infrastructure and activity exists between the Circle and the economic nodes to the east and south.

# Assessment of Zoning, Land Use, and Infrastructure

## SECTOR 5: Train Station/TOD

### OVERVIEW

Representing Addison's future, in terms of internal growth and connectivity, and its role as the geographic centerpiece of North Dallas, the Train Station is a critical component of economic development into the future.

The anticipated investment in regional rail through the Cotton Belt initiative, and its planned station in Addison, provides a tremendous opportunity to evolve Addison's reputation as a balanced community that provides the best of suburban life, but with a taste of walkable, urban living. In addition, this location is a central hub that could be leveraged to provide additional mobility options and enhanced connectivity Town wide

In many ways, the station becomes the geographic "bullseye" for Addison as it looks to build on its reputation as a great place to work and conduct business and an even better place to live. It can become the focal point to connect north to the Circle and Quorum – where some additional development opportunity exists – points south to Belt Line and the southern portions of town, east to the Platinum Corridor and west to the Airport.

### BUILT ENVIRONMENT, MIX OF USES, ZONING CODES, HOUSING OPTIONS

With expected regional rail service, zoning and land use studies are underway by the Town. This area serves as the geographic center of Addison, enabling connective fabric and tissue to extend to Addison Circle to the north, the Tollway Corridor to the east, and Belt Line to the south.

Significant ongoing and future investments are underway that will radically change the nature of the built environment at and around the TOD area. The construction of the AMLI residential building is complemented by a range of studies that the Town is currently conducting. These efforts will be a key aspect of positioning Addison to leverage the presence of rail in the future. In addition, a range of uses at and around the station will serve to increase the viability and attractiveness of residential communities to the north and commercial users and their employees along the Tollway corridor.

Kimley Horn, the Town's consultant recently developed a new master plan for the TOD (Addison Circle Special Area Study, 2018). The implementation aspects of the plan are still to be determined and will be a subject of final recommendations of this study.

# Assessment of Zoning, Land Use, and Infrastructure

## SECTOR 5: Train Station/TOD

### INFRASTRUCTURE

Much like the transformation of the built environment within this area, significant investments in infrastructure are underway. This report will defer to the ongoing studies that the Town is currently conducting, with the note that the provision of transit and walkable, multi-modal infrastructure will be a significant benefit to economic development into the future.

# Assessment of Zoning, Land Use, and Infrastructure

## SECTOR 5: Tollway Corridor

### OVERVIEW

At the heart of Addison's business community, and an ongoing focus for economic development, is the Tollway Corridor. Leveraging the unique nature of Addison Circle, and its exceptional geographic location from a regional standpoint, it is essential to evolve this area in a manner that best addresses the wants and needs of today's workforce and their employers.

New developments such as Legacy in Plano, and CityLine in Richardson represent a more competitive environment for class "A" office and associated economic development. One of the key factors in the success of these hubs is the integrated mix of uses that is highly desired by the workforce and their employers, providing mobility and walkability beyond the automobile.

### BUILT ENVIRONMENT, MIX OF USES, ZONING CODES, HOUSING OPTIONS

Dominated by commercial office mid and high rise towers, the Tollway is the economic heart of Addison. While significant Class "A" offices exist in this area, a number of properties have begun to age and are in need of upgrades, reinvestment and/or redevelopment. The area is zoned PD, Commercial 1,2, or Local Retail, without provisions for residential uses, which may be a hindrance in meeting the market's focus on integrated uses within a walkable setting. While most of the area is built out, select development (and, as noted above, potential future redevelopment) opportunities do exist.

### INFRASTRUCTURE

It is important to consider the Tollway Corridor not in isolation, but rather in consideration of potential connections to Addison Circle to the west and Belt Line Road to the south. This is especially important considering the stated desire of a number of stakeholders to better retain the large daytime population that works along the Tollway into the evening to promote greater capture of that economic activity for local businesses.

There is good supportive infrastructure for the commercial uses in this area as it pertains to the automobile. However, there is a lack of connective, pedestrian oriented infrastructure to leverage the latent economic activity that could be derived from the tens of thousands of employees up and down the Tollway (extending beyond this sector). In addition, the lack of biking and other mobility options may deter a small, but important, sector of the workforce.

That said, the presence of a regionally significant economic hub and job center is well served by access to the Tollway and ingress/egress to the commercial activity within this sector.



# Assessment of Zoning, Land Use, and Infrastructure

**SECTOR 6:** Boundaries are the Tollway to the East, Addison Road to the West up to Westgrove, where the boundary becomes Westgrove

## OVERVIEW

With a small and nearly built out footprint, the land constraints within the Town of Addison are considerable. As such, it is essential to maximize potential development at locations where it can be supported. One key area of focus for future development are properties along Quorum Rd, North of Addison Circle, extending to the Town border. This provides the potential to extend the quality residential neighborhoods that help define the Town of Addison and Addison circle, which is a critical component of attracting and retaining today's talented workforce.

## BUILT ENVIRONMENT, MIX OF USES, ZONING CODES, HOUSING OPTIONS

There are a number of vacant and/or underutilized properties, in addition to existing uses, that are likely to evolve into a higher and better use in the relatively near term future, within this sector. Key opportunities exist for the transformation of the low density showrooms north along Quorum and, potentially, at the Mary Kay site, depending upon their desire and willingness to entertain redevelopment scenarios. The area is currently zoned as Commercial 1,2, PD, Single Family or Local Retail District.

By examining this corridor with an eye toward a mix of uses with a strong residential component (multifamily, with a mix of for sale and rental options), one could envision "extending" the walkable, mixed-use fabric of Addison Circle to the North, building upon one of the region's most desirable neighborhoods.

In the northern portion of this section exists naturally occurring workforce and affordable housing, similar to those found adjacent to the Vitruvian development in the south western portion of the Town. This northern portion of town also contains a range of office buildings which face increased competition from commercial space that is either more proximate to the Tollway and/or within proximity to the more walkable and mixed-use environments.

# Assessment of Zoning, Land Use, and Infrastructure

SECTOR 6: Boundaries are the Tollway to the East, Addison Road to the West up to Westgrove, where the boundary becomes Westgrove

## INFRASTRUCTURE

As current uses do not provide the neighborhood fabric associated with areas directly adjacent to Addison Circle, the infrastructure in this sector is more geared toward the automobile, with less general connectivity. There is a lack of more complete streets and pedestrian connections, especially in the offices located in the more western parts of this sector. Such lack of a public, pedestrian realm dampens economic development potential to some degree, however the lack of proximity to true mixed-use, compact neighborhoods (i.e. Addison Circle) suggest that the need to focus on automobile ingress and egress is at a premium for the economic competitiveness of these locations from a commercial office perspective. There is, however, a lack of supportive uses such as convenience retail and restaurants for employees in the northern sector of the Town.

# Assessment of Mobility

(Note: As Mobility is, by definition, a regional factor, this report has assessed mobility from a Town wide, rather than sector by sector, approach).

The Town of Addison's compact nature and series of distinct neighborhoods and districts provides an ideal foundation to provide improved connectivity and mobility in a manner that leverages the many assets that exist today.

Known for its 190 restaurants, Class "A" office along the Tollway and unique Addison Circle environment, complemented by bedroom communities and the airport, connectivity within and to/from various parts of town are essential to spur additional economic development while improving quality of life is to examine how to provide a wider range of transportation and mobility options.

# Assessment of Mobility

## WALKABILITY AND THE PEDESTRIAN REALM

Perhaps the single biggest issue of concern – and opportunity for improvement – garnered from interviews and focus groups was the overwhelming desire for a more pedestrian friendly, walkable environment. While a number of neighborhoods provide walkability within the immediate area (Vitruvian, Addison Circle), there are significant physical and psychological impediments that stand in the way of utilizing pedestrian and biking options as a means of transportation. While not as important a factor, addressing bikeability is also advised, to promote cycling as both recreation/exercise as well as a mode of transportation. The recent Master Transportation Plan (MTP) did conclude that biking was not necessarily a key factor for local residents and employees, however (1) this may be as a result of the lack of any cohesive bike-related infrastructure in the first place and (2) may need to be re-examined with the onset of new technologies and services, such as scooters or automated micromobility offerings into the future.

## FUTURE RAIL SERVICE AND A HUB FOR MOBILITY

In addition to walking and biking, the Town has an opportunity to leverage the upcoming DART Rail Station, which could serve as a central hub for a full suite of mobility options. Coupled with advancing technology in the realm of automated vehicles, the presence of rail that connects Addison to the rest of the region without need for driving could have significant positive impact – but only if the appropriate steps are taken to offer last mile connectivity and appropriately scaled, dense and mixed-use development at the station, and throughout the Town within its various hubs of activity. Understanding the Town once provided internal mobility through a small bus / van type of system, it may be time to re-examine how such an offering could work with the additional densities throughout town, further supported by the markets growing desire for transportation solutions that eschew driving, especially for short trips and around town.

# Assessment of Mobility

## OPPORTUNITY WITH AUTOMATED VEHICLES AND OTHER MOBILITY INNOVATIONS

In addition, there may be an opportunity to attract the growing field of automated vehicles and utilize Addison – with its compact footprint, presence of the airport and oncoming Rail Service, and its series of distinct destinations – as a “testing ground” for new technologies. Such an approach would highlight Addison as a forward thinking town that embraces innovative solutions to mobility and economic development, building upon its reputation as business friendly with exceptional neighborhoods and a range of entertainment options.

Additional last mile, circulator and regional mobility options, including those with permanent associated infrastructure (i.e. Hyperloop concepts, local connectors that utilize elevated Pods not unlike Gondola systems) may also be worth examining, especially if there is a viable technology, backed by sufficient capital, to invest in the Town through a mutually beneficial partnership.

## BELT LINE ROAD: CONNECTOR OR DIVIDER

From a physical standpoint, there is an essential need to consider the evolution of Belt Line Road from an auto-only, low density and retail-centric corridor into a more cohesive element that provides not only for auto-traffic, but enhances local businesses and the overall environment through greater pedestrian treatments and potentially the provision of bike-related infrastructure (as noted above, the MTP suggests this is not a priority at present, but that could change with emerging technologies and/or the provision of infrastructure that would enhance the ability to utilize biking as a means of transportation).

As it stands today, the physical nature of Belt Line Rd. acts to deter connectivity from areas north to south. In addition, it negatively impacts the pedestrian experience along this essential stretch of road. In many ways, Belt Line Rd. is the “main street” for Addison, and it is the primary means by which many throughout the region experience the Town. As such, it is important to consider this key infrastructure in terms of function and form, both for the auto and, especially in today’s economic development climate and evolving retail landscape, the pedestrian.

# Assessment of Mobility

## INTEGRATED MOBILITY, LAND USE AND FORM

Finally, it is essential to calibrate the aesthetics of the area and the form of new development to complement any investments in changing the physical nature of the roadway itself. In fact, the current efforts to bury utility lines along this corridor is an example of how our interaction with an area is largely dependent upon its “look and feel.” It is important to engender a positive experience for people who wish to live, work or shop along Belt Line, whatever zoning and land uses are considered appropriate, to ensure investments in connectivity, mobility and the pedestrian experience are maximized. As one example, A Form-Based Code is one such tool to achieve this end, though not the exclusive means to achieve desired outcomes. Significant economic and social benefits accrue from codifying appropriate urban form, while allowing the market to better dictate the specifics uses that occur within the buildings themselves. Risk for the development community and land owners is reduced with upside improved by instilling confidence in the market through an assurance of good and appropriate building form.

Simply put, if someone invests in developing a project on one property, it is in my interest to know that the adjacent property, when (re)developed, will be done so in a manner that complements the look and feel of the corridor as envisioned, promotes great aesthetics, allows for variation in specific architectural treatments (you may want the form of the buildings to be bound by a certain relationship to the street, fronting the road with parking in the rear, high and bulk limitations where appropriate) but also provides some flexibility in terms of specific use, that maximizes the ability for all property owners to adjust to changing market conditions, while retaining the overall character and economic value of the corridor. This is also discussed in the section for “Zoning and Land Use,” however the need to consider mobility, form and use within the same context is essential to achieve the most desirable, and sustainable, outcomes.



# Assessment of Mobility

## BUILDING OFF OF PREVIOUS EFFORTS – 2016 MOBILITY STRATEGY

Many of the observations, and subsequent recommendations, that our team has made as a result of our site tours and interviews were supported by, and confirm, much of the work conducted in the Town's 2016 Master Transportation Plan Update. The MTP should be both viewed and utilized within the context of serving the needs not only of the Town's population, but as a critical component to forwarding a place-based economic development strategy.

While our scope entailed a high level review of the role of mobility and transportation through the lens of economic development, the strategies and tactics presented in the 2016 plan provide a high level of detail as to how the Town might achieve its goals (economic and otherwise) through a reinvention of its transportation plan, rooted in physical infrastructure investment and changes, along with potential new modes of service. That document should serve as a basis for future planning and investment, through a coordinated effort that also encompasses land use, and the promotion of additional economic development.

In regard to some of the common themes that exist in both the 2016 MTP and those observed by this effort include:

- **Cotton Belt** – Since the plan was written, it appears that DART has committed to opening the rail station in Addison. Studies are underway by the Town to maximize benefits in regard to value capture opportunities and leveraging the opportunity to utilize the station as a center for mobility to/from and within the Town, in addition to the provision of addressing first/last mile connectivity.
- **Improvements re: Walkability and the Pedestrian Realm** should continue to be a point of emphasis as increased walkability would leverage the Town's existing neighborhoods and nodes of activity
- **Creating more bike and micromobility options** – There may be latent demand to utilize biking as a mode of transportation as well as recreation, but the current lack of dedicated bike lanes and other such infrastructure is a significant deterrent. That said, the recent MTP did not demonstrate that this should be a priority, but rather may be considered in light of other advancing technologies and micromobility services that could utilize mobility lanes (if not bike lanes)
- **Connect East and West** – Efforts to better connect neighborhoods to the east and west of the tollway, creating a hinge rather than a barrier

# Assessment of Mobility

## BUILDING OFF OF PREVIOUS EFFORTS – 2016 MOBILITY STRATEGY (CONTINUED)

In regard to some of the common themes that exist in both the 2016 MTP and those observed by this effort include:

- **Complete Streets and Context Sensitive Design** can incorporate the above, designed in a manner that is appropriate for the specific neighborhood in which it is located. In addition, such an approach can better meet and/or maximize existing and future land uses along the right of way
- **Pass Through Traffic / Congestion and Street Calming** – Per the MTP, vehicular traffic has actually been reduced since peak traffic in the 1990's, with only limited areas that expect additional congestion in the future. This presents a landscape where complete streets and ped/bike infrastructure could be accommodated as opposed to a need for additional lanes for auto-traffic (it was noted in the MTP that additional lanes would not likely be recommended in most cases).
- **Intra-Town Transit and Mobility** – Strong agreement exists in regard to the desirability of a circulator and/or other mobility options that would serve the needs of residents, employees and visitors who wish to go from one area of Addison to another neighborhood or district. In the short time since the plans release, additional opportunities may now exist with growing mobility-on-demand and/or ride share services and the early stages of automated mobility services. The latter of these is worth exploration as Addison's compact nature and series of neighborhoods and other activity hubs might present an attractive area for some of the more cutting edge companies who seek to explore pilot programs within a P3 or private-sector led effort.
- **Explore Value Capture** – While the MTP discussed the need to identify funding sources for a range of infrastructure investments and potential improvements, the Town may wish to consider undertaking a focused examination of value capture opportunities, whereby future development can provide additional resources through a number of public and private sector funding/financing mechanisms. Those resources and/or revenues streams can be monetized to pay for upfront investments that will enable significant positive overall returns on investment. The DART station is a logical opportunity for Value Capture, but there may be additional options including along a potentially reinvented Belt Line road, at/around the Tollway and other strategic locations that might support intense, mixed-use development in the future.

# Section 6: Talent-Led Target Industry Analysis

Economic Base Analysis	115
Occupational Base Analysis	126
Target Industry Identification Analysis	137
Information	142
Finance and Insurance	150
Professional, Scientific, and Technical Services	165
Management of Companies and Enterprises Administrative and Support and Waste Management and Remediation Services	187
Accommodation and Food Services	209
Target Industry Screening and Recommendations	217

# Economic Base Analysis

# Economic Base Analysis

## INTRODUCTION

In order to gain some background knowledge on Addison's current industry and occupation make-up, Ady Advantage conducted analysis at the 2-digit NAICS code level (industry) and at the 2-digit SOC code level (occupations). The data that we look at in the following sections for both industry and occupation include:

- Number of employees
- Concentration (location quotient)
- Wages
- Past five-year growth
- Future expected ten-year growth

The data found on the following pages was obtained through Dallas County Community College District's license with JobsEQ. Note that while JobsEQ provides information on industries and their impact on the local economy, it does not include identities of specific firms.



# Economic Base Analysis

## RESULTS PRESENTED ON GRAPHS

The various bubble charts, shown on the following pages, graphically show this first-level industry analysis for the Town of Addison, as well as for the greater region. The **core region** is defined as the Town of Addison, Texas. The **greater region** is defined as including the following counties: Collin, Dallas, Denton, and Tarrant Counties. The same analytical and graphical approach is used throughout this target industry analysis to help visually show the various industries at increasingly granular levels of analysis (e.g., from a 2-digit level up to and including a 6-digit analysis).

In each graph, the X-axis is the historic growth or contraction by industry over time; the Y-axis identifies the industry location quotient, and the size of the industry cluster circle represents the number of employees in the region.

The graph breaks into four quadrants, split by industries above and below 0% growth, and those above and below average concentration ( $LQ = 1.0$ ). The four quadrants reflect four general approaches to the industries, which we use as a starting point and then adjust based on the specific dynamics within a client's region as well as our experience in conducting similar analyses in many diverse regions.

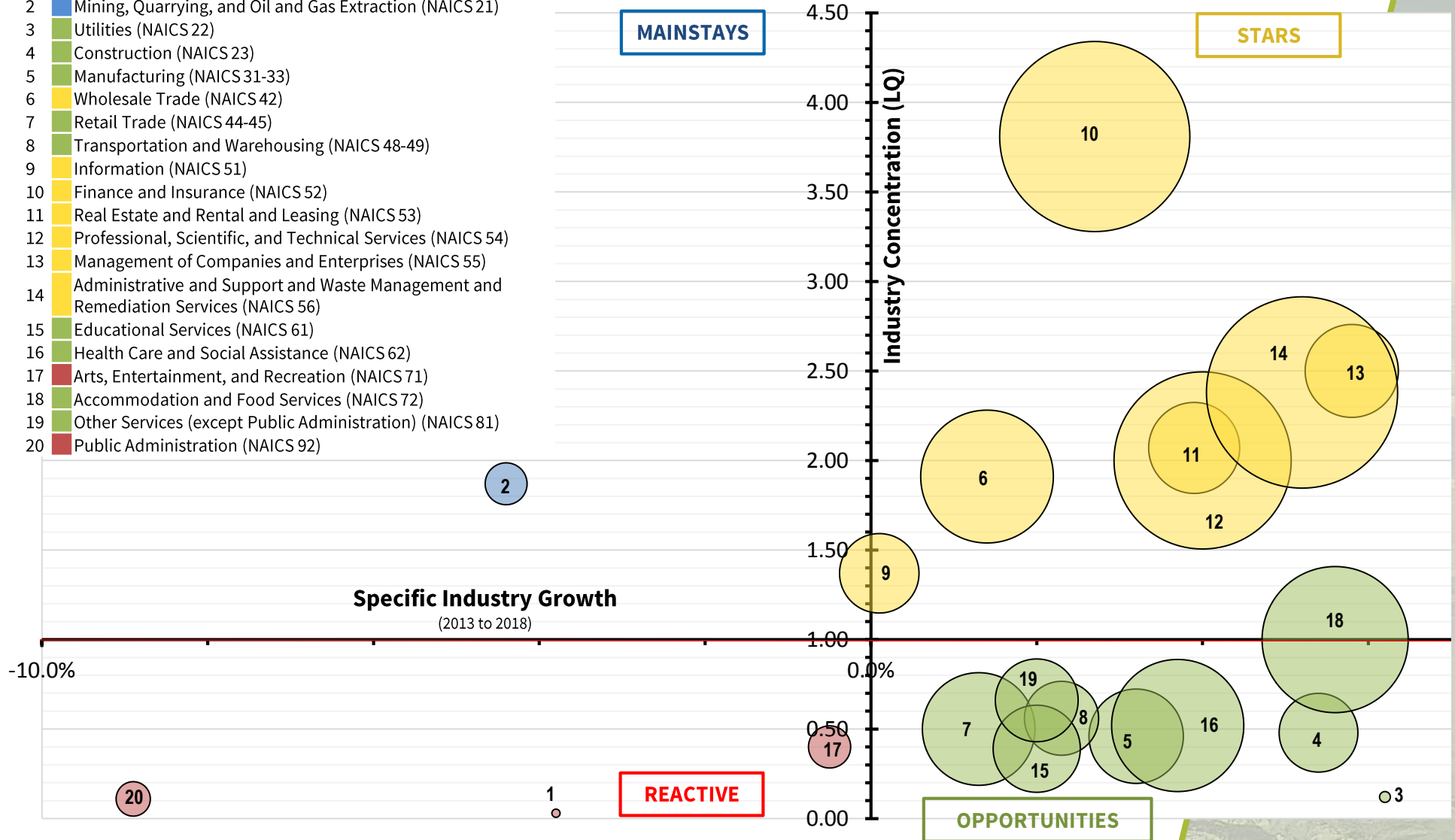
The general approaches to each of the four quadrants are as follows:

- *Stars (Gold)*: Positive Growth / Above Average Concentration: Industries that currently drive the economy. They have been positive contributors to economic growth and there is a high-level of existing specialization and economic infrastructure; therefore, the region is likely competitive in those industries. These industries are often ideal targets for growing existing industry and attracting new industry.
- *Mainstays (Blue)*: Negative Growth / Above Average Concentration: These industries represent a very important part of the economy, but they have not been contributing to growth, and may in fact be contributing to job loss. It is important that these industries be aggressively supported through retention efforts to ensure they can continue to play a significant role in the economy.
- *Opportunities (Green)*: Positive Growth / Below Average Concentration: These industries have been growing, but are not currently well represented in the regional economy. If the regional economic infrastructure is able to support the operational requirements of these businesses, there is the opportunity to develop future stars. To foster such opportunities, economic development organizations need to develop needed infrastructure and be engaged in attraction.
- *Reactive (Red)*: Negative Growth / Below Average Concentration: These industries are not well represented in the region and have not been growing. As such, they should only be targeted in reaction to some need or opportunity, as such need or opportunity arises.

# Economic Base Analysis

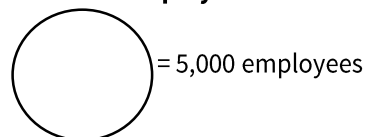
**GRAPH 3.1 CORE REGION INDUSTRY ANALYSIS**

- 1 Agriculture, Forestry, Fishing and Hunting (NAICS 11)
- 2 Mining, Quarrying, and Oil and Gas Extraction (NAICS 21)
- 3 Utilities (NAICS 22)
- 4 Construction (NAICS 23)
- 5 Manufacturing (NAICS 31-33)
- 6 Wholesale Trade (NAICS 42)
- 7 Retail Trade (NAICS 44-45)
- 8 Transportation and Warehousing (NAICS 48-49)
- 9 Information (NAICS 51)
- 10 Finance and Insurance (NAICS 52)
- 11 Real Estate and Rental and Leasing (NAICS 53)
- 12 Professional, Scientific, and Technical Services (NAICS 54)
- 13 Management of Companies and Enterprises (NAICS 55)
- 14 Administrative and Support and Waste Management and Remediation Services (NAICS 56)
- 15 Educational Services (NAICS 61)
- 16 Health Care and Social Assistance (NAICS 62)
- 17 Arts, Entertainment, and Recreation (NAICS 71)
- 18 Accommodation and Food Services (NAICS 72)
- 19 Other Services (except Public Administration) (NAICS 81)
- 20 Public Administration (NAICS 92)



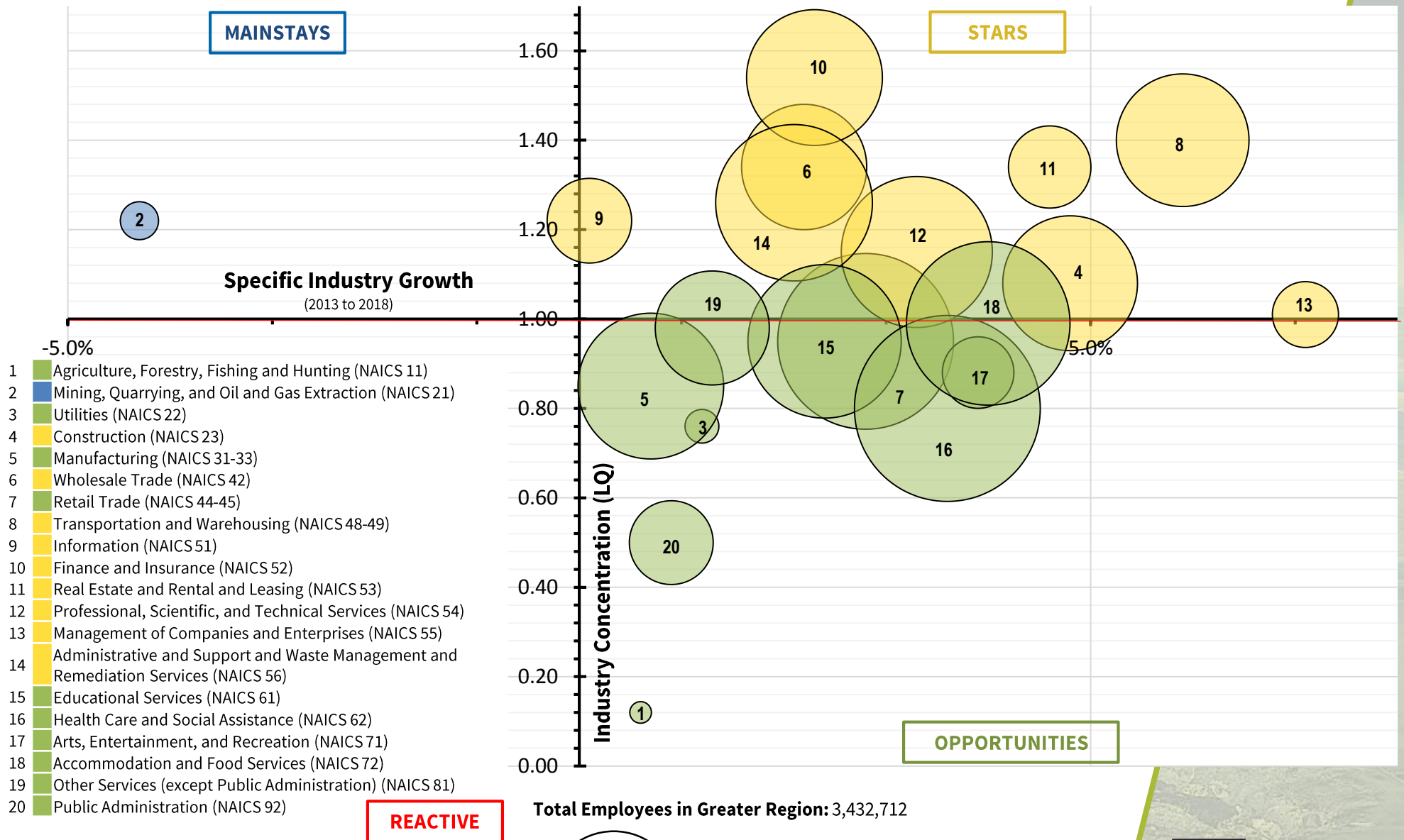
Circle Size = Number of employees in Town of Addison  
Source: JobsEQ, 2018 - Dallas County Community College District

Total Employees in Town of Addison: 110,508



# Economic Base Analysis

**GRAPH 3.2 GREATER REGION INDUSTRY ANALYSIS**



# Economic Base Analysis

## COMPARISON OF INDUSTRY CONCENTRATION

There are some marked differences in concentration between the core region and the greater region. It is instructive to examine these differences because it helps indicate how the Town of Addison may fit within the larger region. Note: clusters where the core region is more highly concentrated are highlighted in green.

The following industries have a significantly higher concentration ( $>0.2$ ) in the core region than that of the greater region:

- Mining, Quarrying and Oil and Gas Extraction (NAICS 21)
- Wholesale Trade (NAICS 42)
- Finance and Insurance (NAICS 52)
- Real Estate and Rental and Leasing (NAICS 53)
- Professional, Scientific, and Technical Services (NAICS 54)
- Management of Companies and Enterprises (NAICS 55)
- Administrative and Support and Waste Management and Remediation Services (NAICS 56)

The only other industry in which the core region has a significantly high concentration ( $>1.0$ ) is Information (NAICS 51).

It should also be noted that the greater region has a significantly higher concentration ( $>0.2$ ) than the core region in the following industries:

- Utilities (NAICS 22)
- Construction (NAICS 23)
- Manufacturing (NAICS 31-33)
- Retail Trade (NAICS 44-45)
- Transportation and Warehousing (NAICS 48-49)
- Educational Services (NAICS 61)
- Health Care and Social Assistance (NAICS 62)
- Arts, Entertainment, and Recreation (NAICS 71)
- Other Services (except Public Administration) (NAICS 81)
- Public Administration (NAICS 92)

# Economic Base Analysis

Table 3.2.A: Existing Industry Concentration Comparison	Addison Total Employment	Greater Region Total Employment	Addison Location Quotient	Greater Region Location Quotient
<b>Total All Industries</b>	<b>110,508</b>	<b>3,432,712</b>	<b>-</b>	<b>-</b>
Agriculture, Forestry, Fishing and Hunting (NAICS 11)	42	5,937	0.03	0.12
Mining, Quarrying, and Oil and Gas Extraction (NAICS 21)	858	17,352	1.87	1.22
Utilities (NAICS 22)	69	13,742	0.12	0.76
Construction (NAICS 23)	2,934	207,134	0.48	1.08
Manufacturing (NAICS 31-33)	4,185	241,504	0.46	0.85
Wholesale Trade (NAICS 42)	8,229	179,085	1.91	1.34
Retail Trade (NAICS 44-45)	5,949	350,552	0.50	0.95
Transportation and Warehousing (NAICS 48-49)	2,603	200,785	0.56	1.40
Information (NAICS 51)	2,980	82,650	1.37	1.22
Finance and Insurance (NAICS 52)	16,771	210,017	3.81	1.54
Real Estate and Rental and Leasing (NAICS 53)	3,894	78,234	2.07	1.34
Professional, Scientific, and Technical Services (NAICS 54)	14,558	259,746	2.00	1.15
Management of Companies and Enterprises (NAICS 55)	4,068	50,747	2.50	1.01
Administrative and Support and Waste Management and Remediation Services (NAICS 56)	16,962	279,063	2.38	1.26
Educational Services (NAICS 61)	3,567	267,626	0.39	0.95
Health Care and Social Assistance (NAICS 62)	8,158	392,016	0.52	0.80
Arts, Entertainment, and Recreation (NAICS 71)	866	59,482	0.40	0.88
Accommodation and Food Services (NAICS 72)	9,931	303,706	1.00	0.99
Other Services (except Public Administration) (NAICS 81)	3,244	148,854	0.66	0.98
Public Administration (NAICS 92)	582	81,013	0.11	0.50

Source: JobsEQ, 2018 - Dallas County Community College District

Core Region LQ > than Greater Region (by  $\geq 0.2$ )

Core Region LQ < than Greater Region (by  $\geq 0.2$ )

Core Region LQ and Greater Region LQ are not significantly different

# Economic Base Analysis

## COMPARISON OF INDUSTRY WAGES

For almost all of the industries, the core region's wages are higher than two of the three comparison regions (the greater region, the Texas average and the national average) (highlighted in red).

There are two regions in which the core region's wages are lower than all of the comparison regions (highlighted in green):  
Transportation and Warehousing (NAICS 48-49) and Management of Companies and Enterprises (NAICS 55).

There may be opportunities in those industries in which the core region is on par or has lower wages in comparison. Lower wages can be used to attract new businesses, which in theory creates more demand for those workers resulting in increased wages over time.



# Economic Base Analysis

Table 3.2.B: Existing Industry Wage Comparison	Addison Average Cluster Wage (Annual)	Greater Region Average Cluster Wage (Annual)	Texas Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
<b>Total Industry (Average Wage)</b>	<b>\$66,363</b>	<b>\$60,688</b>	<b>\$54,433</b>	<b>\$54,343</b>
Agriculture, Forestry, Fishing and Hunting (NAICS 11)	\$31,601	\$23,362	\$27,314	\$35,453
Mining, Quarrying, and Oil and Gas Extraction (NAICS 21)	\$241,084	\$174,313	\$126,703	\$101,386
Utilities (NAICS 22)	\$110,202	\$95,749	\$90,613	\$96,393
Construction (NAICS 23)	\$63,991	\$62,464	\$58,783	\$56,254
Manufacturing (NAICS 31-33)	\$82,236	\$80,887	\$74,991	\$66,637
Wholesale Trade (NAICS 42)	\$89,526	\$84,446	\$80,150	\$75,418
Retail Trade (NAICS 44-45)	\$36,072	\$34,108	\$31,601	\$31,437
Transportation and Warehousing (NAICS 48-49)	\$53,160	\$58,193	\$60,245	\$54,041
Information (NAICS 51)	\$103,039	\$98,556	\$81,306	\$99,147
Finance and Insurance (NAICS 52)	\$104,464	\$97,118	\$87,968	\$104,356
Real Estate and Rental and Leasing (NAICS 53)	\$80,031	\$70,449	\$61,283	\$57,532
Professional, Scientific, and Technical Services (NAICS 54)	\$103,524	\$95,046	\$89,180	\$90,346
Management of Companies and Enterprises (NAICS 55)	\$119,612	\$121,852	\$130,667	\$119,296
Administrative and Support and Waste Management and Remediation Services (NAICS 56)	\$44,848	\$45,501	\$41,510	\$38,731
Educational Services (NAICS 61)	\$52,829	\$48,916	\$45,476	\$49,258
Health Care and Social Assistance (NAICS 62)	\$60,705	\$56,953	\$48,950	\$50,488
Arts, Entertainment, and Recreation (NAICS 71)	\$44,886	\$38,330	\$32,564	\$35,679
Accommodation and Food Services (NAICS 72)	\$23,840	\$22,057	\$20,180	\$21,283
Other Services (except Public Administration) (NAICS 81)	\$38,687	\$33,995	\$32,024	\$32,484
Government (NAICS 90)	\$74,183	\$72,264	\$62,298	\$63,606

Source: JobsEQ, 2018 - Dallas County Community College District

Addison wages < 2 or more region wages

Addison wages > 2 or more region wages

# Economic Base Analysis

## COMPARISON OF INDUSTRY GROWTH

Looking at growth by industry cluster provides some indication of potential strengths of an industry in the region, at the state level, as well as at the national level. Growth was examined by looking at both the previous five-year period (2013-2017), as well as the projected ten-year growth (2017-2027). In order to see where the growth is happening, the cells of the table were highlighted green where growth was greater than or equal to two percent in the respective period and was highlighted red where growth was less than or equal to negative two percent.

One industry has experienced and will experience growth of over two percent in all regions but one (7 out of 8 columns highlighted green): Health Care and Social Assistance (NAICS 62). Three additional industries have experienced growth and will experience growth of over two percent in all regions and all time periods but two (6 out of 7 columns highlighted green): Construction (NAICS 23); Professional, Scientific, and Technical Services (NAICS 54); and Administrative and Support and Waste Management and Remediation Services (NAICS 56).

None of the industries have experienced a significant decline in the core region over the past 5-year period as well as are projected to continue to experience a significant decline over the next 10-year period.

# Economic Base Analysis

Table 3.2.C: Existing Industry Growth Comparison	Addison 5-year Growth (2013 - 2017)	Addison 10-year Projected Growth (2017 - 2027)	Greater Region 5-year Growth (2013-2017)	Greater Region 10-year Projected Growth (2017-2027)	Texas 5-year Growth (2013 - 2017)	Texas 10-year Projected Growth (2017 - 2027)	U.S. 5-year Growth (2013 - 2017)	U.S. 10-year Projected Growth (2017 - 2027)
<b>Total All Industries</b>	<b>3.2%</b>	<b>1.5%</b>	<b>2.9%</b>	<b>1.8%</b>	<b>2.1%</b>	<b>1.6%</b>	<b>1.7%</b>	<b>0.7%</b>
Agriculture, Forestry, Fishing and Hunting (NAICS 11)	(3.8%)	1.1%	0.6%	1.9%	0.1%	0.7%	0.7%	0.4%
Mining, Quarrying, and Oil and Gas Extraction (NAICS 21)	(4.4%)	2.5%	(4.3%)	2.6%	(3.7%)	2.7%	(4.7%)	1.4%
Utilities (NAICS 22)	6.2%	0.4%	1.2%	1.7%	0.6%	1.3%	0.2%	0.2%
Construction (NAICS 23)	5.4%	1.7%	4.8%	2.1%	3.2%	2.0%	3.4%	1.1%
Manufacturing (NAICS 31-33)	3.2%	(0.1%)	0.7%	0.5%	(0.3%)	0.3%	0.8%	(0.6%)
Wholesale Trade (NAICS 42)	1.4%	0.8%	2.2%	1.2%	1.7%	1.2%	0.8%	0.3%
Retail Trade (NAICS 44-45)	1.3%	0.6%	2.8%	1.4%	2.1%	1.2%	1.2%	0.3%
Transportation and Warehousing (NAICS 48)	2.3%	1.7%	5.9%	1.6%	3.2%	1.4%	2.7%	0.6%
Information (NAICS 51)	0.1%	0.8%	0.1%	1.0%	0.4%	1.0%	0.7%	0.4%
Finance and Insurance (NAICS 52)	2.7%	1.8%	2.3%	1.8%	2.2%	1.6%	1.1%	0.7%
Real Estate and Rental and Leasing (NAICS 53)	3.9%	1.2%	4.6%	1.6%	3.2%	1.5%	2.0%	0.6%
Professional, Scientific, and Technical Services (NAICS 54)	4.0%	1.8%	3.3%	2.2%	3.3%	2.2%	2.3%	1.2%
Management of Companies and Enterprises (NAICS 55)	5.8%	1.3%	7.1%	1.6%	7.9%	1.6%	2.6%	0.6%
Administrative and Support and Waste Management and Remediation Services (NAICS 56)	5.2%	1.6%	2.1%	2.0%	2.2%	2.0%	2.3%	1.0%
Educational Services (NAICS 61)	2.0%	1.4%	2.4%	1.5%	1.7%	1.3%	0.7%	0.7%
Health Care and Social Assistance (NAICS 62)	3.7%	2.9%	3.6%	2.9%	2.9%	2.7%	2.5%	1.8%
Arts, Entertainment, and Recreation (NAICS 71)	(0.5%)	1.6%	3.9%	1.9%	3.6%	1.8%	2.1%	0.8%
Accommodation and Food Services (NAICS 72)	5.6%	1.3%	4.0%	1.8%	3.7%	1.6%	2.9%	0.7%
Other Services (except Public Administration) (NAICS 81)	0.2%	1.5%	1.3%	1.6%	1.1%	1.4%	(0.3%)	0.6%
Public Administration (NAICS 92)	(8.9%)	1.0%	0.9%	1.3%	0.6%	1.0%	0.2%	0.2%

Source: JobsEQ, 2018 - Dallas County Community College District

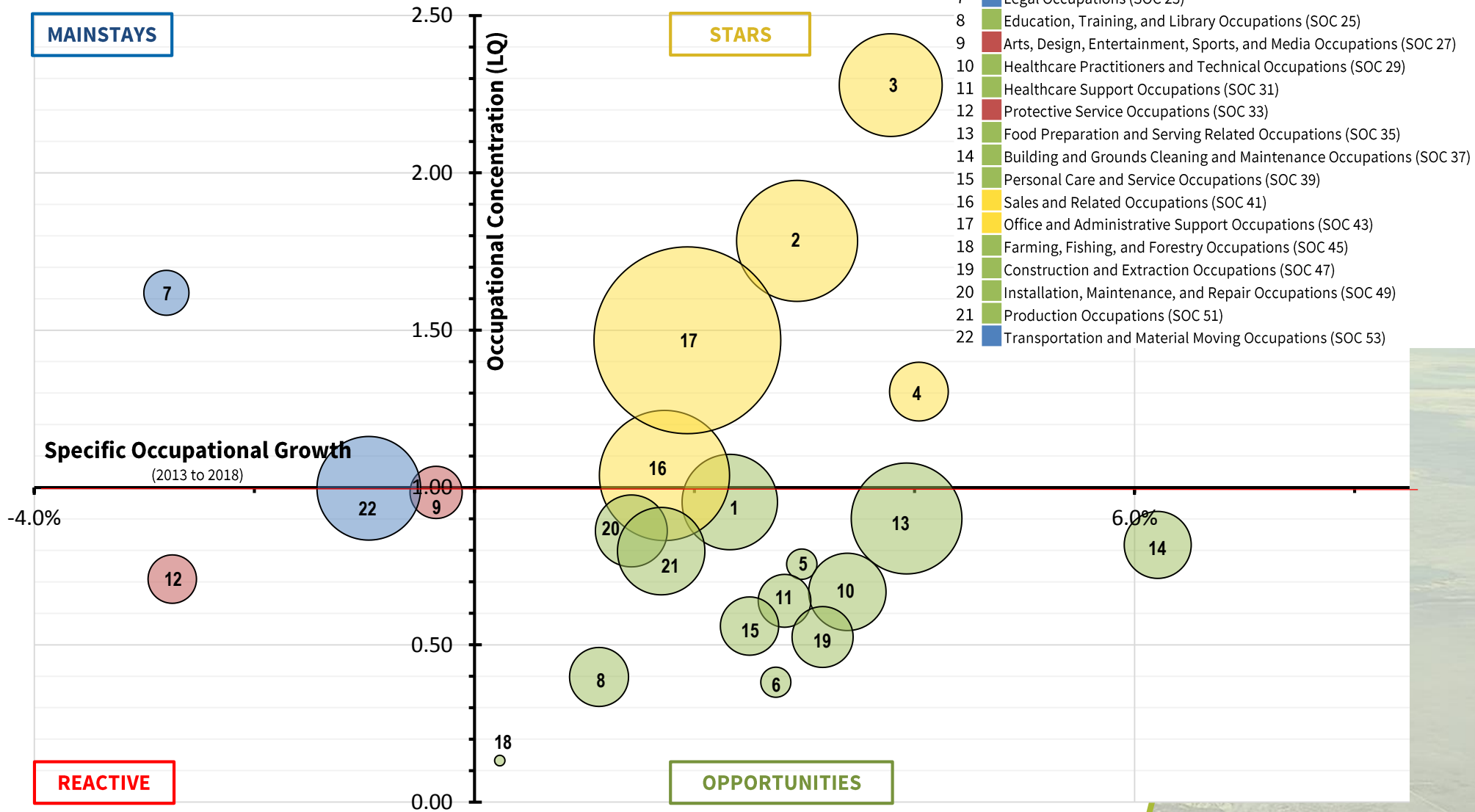
Industry growth greater than or equal to two percent in the respective region and time frame.

Industry growth is less than or equal to negative two percent in the respective region and time frame.

# Occupational Base Analysis

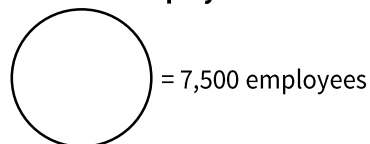
# Occupational Base Analysis

GRAPH 3.3 CORE REGION OCCUPATIONAL ANALYSIS



Circle Size = Number of employees in Town of Addison  
Source: JobsEQ, 2018q1 - Dallas County Community College District

Total Employees in Town of Addison: 110,818



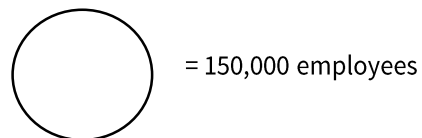
# Occupational Base Analysis

GRAPH 3.4 GREATER REGION OCCUPATIONAL ANALYSIS



Circle Size = Number of employees in Greater Region  
Source: JobsEQ, 2018q1 - Dallas County Community College District

Total Employees in Greater Region: 3,454,683





# Occupational Base Analysis

## COMPARISON OF OCCUPATION CONCENTRATION

There are some marked differences in concentration between the Town of Addison and the greater region. It is instructive to examine these differences because it helps indicate how the Town of Addison may fit within the larger region. Note: clusters where the core region is more highly concentrated are highlighted in green.

The following occupations have a significantly higher concentration ( $>0.5$ ) in the core region than that of the greater region:

- Business and Financial Operations Occupations (SOC 13)
- Computer and Mathematical Occupations (SOC 15)
- Legal Occupations (SOC 23)

The occupations in which the core region has a significantly high concentration ( $>1.0$ ) are:

- Architecture and Engineering Occupations (SOC 17)
- Sales and Related Occupations (SOC 41)
- Office and Administrative Support Occupations (SOC 43)

It should also be noted that the greater region does not have a significantly higher concentration ( $>0.5$ ) than the core region in any occupation group.

# Occupational Base Analysis

Table 3.4.A: Existing Occupation Concentration Comparison	Addison Total Employment	Greater Region Total Employment	Texas Total Employment	Addison Location Quotient	Greater Region Location Quotient	Texas Location Quotient
<b>Total All Occupations</b>	<b>110,818</b>	<b>3,454,683</b>	<b>13,129,052</b>	-	-	-
Management Occupations (SOC 11)	6,363	172,723	722,738	0.95	0.83	0.91
Business and Financial Operations Occupations (SOC 13)	10,184	197,170	638,075	1.78	1.11	0.94
Computer and Mathematical Occupations (SOC 15)	7,397	133,390	373,754	2.28	1.32	0.97
Architecture and Engineering Occupations (SOC 17)	2,449	62,913	241,387	1.30	1.08	1.09
Life, Physical, and Social Science Occupations (SOC 19)	685	16,771	91,457	0.76	0.59	0.85
Community and Social Service Occupations (SOC 21)	677	36,789	165,637	0.38	0.66	0.79
Legal Occupations (SOC 23)	1,463	28,083	101,444	1.62	1.00	0.95
Education, Training, and Library Occupations (SOC 25)	2,483	172,901	776,424	0.40	0.89	1.05
Arts, Design, Entertainment, Sports, and Media Occupations (SOC 27)	1,958	56,169	194,203	0.98	0.91	0.82
Healthcare Practitioners and Technical Occupations (SOC 29)	4,204	176,054	688,517	0.67	0.90	0.92
Healthcare Support Occupations (SOC 31)	1,991	84,074	347,007	0.64	0.87	0.94
Protective Service Occupations (SOC 33)	1,689	66,834	280,645	0.71	0.90	0.99
Food Preparation and Serving Related Occupations (SOC 35)	8,567	295,993	1,170,533	0.90	1.00	1.04
Building and Grounds Cleaning and Maintenance Occupations (SOC 37)	3,187	109,640	434,985	0.82	0.90	0.94
Personal Care and Service Occupations (SOC 39)	2,424	112,694	500,962	0.56	0.83	0.98
Sales and Related Occupations (SOC 41)	11,772	381,797	1,387,258	1.04	1.08	1.03
Office and Administrative Support Occupations (SOC 43)	24,068	596,155	2,050,746	1.47	1.17	1.06
Farming, Fishing, and Forestry Occupations (SOC 45)	96	4,274	52,682	0.13	0.19	0.61
Construction and Extraction Occupations (SOC 47)	2,638	156,530	743,136	0.52	1.00	1.25
Installation, Maintenance, and Repair Occupations (SOC 49)	3,646	143,527	550,102	0.86	1.09	1.10
Production Occupations (SOC 51)	5,366	178,424	698,999	0.80	0.85	0.88
Transportation and Material Moving Occupations (SOC 53)	7,511	271,778	918,361	1.00	1.16	1.03

Source: JobsEQ, 2018q1 - Dallas County Community College District

Addison LQ > than Greater Region (by  $\geq 0.5$ )

Addison LQ < than Greater Region (by  $\geq 0.5$ )

Addison LQ and Greater Region LQ are not significantly different

# Occupational Base Analysis

## COMPARISON OF OCCUPATION WAGES

For all of the occupation groups, the core region's wages are higher than two of the three comparison regions (the greater region, the Texas average and the national average) (highlighted in red).

There may be opportunities in those industries in which the core region is on par or has lower wages in comparison. Lower wages can be used to attract new businesses, which in theory creates more demand for those workers resulting in increased wages over time.

# Occupational Base Analysis

Table 3.4.B: Existing Occupation Wage Comparison	Addison Average Cluster Wage (Annual)	Greater Region Average Cluster Wage (Annual)	Texas Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
<b>Total Occupation (Average Wage)</b>	<b>\$60,266</b>	<b>\$58,310</b>	<b>\$56,123</b>	<b>\$57,522</b>
Management Occupations (SOC 11)	\$116,461	\$112,285	\$109,021	\$104,144
Business and Financial Operations Occupations (SOC 13)	\$77,765	\$74,981	\$71,250	\$70,647
Computer and Mathematical Occupations (SOC 15)	\$92,200	\$88,421	\$86,505	\$88,795
Architecture and Engineering Occupations (SOC 17)	\$87,597	\$85,063	\$86,377	\$81,077
Life, Physical, and Social Science Occupations (SOC 19)	\$75,667	\$73,553	\$73,065	\$76,914
Community and Social Service Occupations (SOC 21)	\$54,106	\$52,189	\$48,917	\$47,850
Legal Occupations (SOC 23)	\$94,289	\$91,411	\$79,156	\$78,989
Education, Training, and Library Occupations (SOC 25)	\$69,654	\$67,595	\$66,300	\$71,708
Arts, Design, Entertainment, Sports, and Media Occupations (SOC 27)	\$55,734	\$54,080	\$53,351	\$58,824
Healthcare Practitioners and Technical Occupations (SOC 29)	\$105,822	\$103,248	\$97,410	\$98,744
Healthcare Support Occupations (SOC 31)	\$38,671	\$37,394	\$35,494	\$35,294
Protective Service Occupations (SOC 33)	\$54,747	\$52,891	\$48,695	\$50,773
Food Preparation and Serving Related Occupations (SOC 35)	\$27,594	\$26,656	\$25,178	\$26,417
Building and Grounds Cleaning and Maintenance Occupations (SOC 37)	\$34,440	\$33,310	\$31,750	\$34,130
Personal Care and Service Occupations (SOC 39)	\$30,713	\$30,006	\$29,133	\$32,082
Sales and Related Occupations (SOC 41)	\$55,045	\$53,550	\$51,905	\$53,595
Office and Administrative Support Occupations (SOC 43)	\$40,902	\$39,734	\$37,814	\$38,913
Farming, Fishing, and Forestry Occupations (SOC 45)	\$34,100	\$32,686	\$32,443	\$35,593
Construction and Extraction Occupations (SOC 47)	\$41,989	\$40,090	\$40,008	\$46,257
Installation, Maintenance, and Repair Occupations (SOC 49)	\$46,872	\$44,883	\$44,162	\$46,412
Production Occupations (SOC 51)	\$38,487	\$37,230	\$36,852	\$38,690
Transportation and Material Moving Occupations (SOC 53)	\$52,991	\$51,573	\$49,910	\$49,633

Source: JobsEQ, 2018q1 - Dallas County Community College District

Addison wages < 2 or more region wages  
Addison wages > 2 or more region wages

# Occupational Base Analysis

## COMPARISON OF OCCUPATION GROWTH

Looking at growth by occupation cluster provides some indication of potential strengths of an occupation in the region, at the state level, as well as at the national level. Growth was examined by looking at both the previous five-year period (2013-2017), as well as the projected ten-year growth (2017-2027). In order to see where the growth is happening, the cells of the table were highlighted green where growth was greater than or equal to two percent in the respective period and was highlighted red where growth was less than or equal to negative two percent.

One occupation has experienced and will experience growth of over two percent in all regions but one (7 out of 8 columns highlighted green): Healthcare Support Occupations (SOC 31). Three additional industries have experienced growth and will experience growth of over two percent in all regions and all time periods but two (6 out of 7 columns highlighted green): Computer and Mathematical Occupations (SOC 15); Community and Social Service Occupations (SOC 21); and Healthcare Practitioners and Technical Occupations (SOC 29).

None of the industries have experienced a significant decline in the core region over the past 5-year period as well as are projected to continue to experience a significant decline over the next 10-year period.

# Occupational Base Analysis

Table 3.4.C: Existing Occupation Growth Comparison	Addison 5-year Growth (2013 – 2018)	Addison 10-year Projected Growth (2018 – 2028)	Greater Region 5-year Growth (2013 - 2018)	Greater Region 10-year Projected Growth (2018 - 2028)	Texas 5-year Growth (2013-2018)	Texas 10-year Projected Growth (2018-2028)	U.S. 5-year Growth (2013 - 2018)	U.S. 10-year Projected Growth (2018 - 2028)
<b>Total All Occupations</b>	<b>1.9%</b>	<b>1.5%</b>	<b>2.3%</b>	<b>1.7%</b>	<b>1.6%</b>	<b>1.5%</b>	<b>1.3%</b>	<b>0.7%</b>
Management Occupations (SOC 11)	2.3%	1.6%	2.3%	1.8%	1.8%	1.6%	1.3%	0.7%
Business and Financial Operations Occupations (SOC 13)	2.9%	1.7%	2.4%	1.7%	2.2%	1.7%	1.4%	0.8%
Computer and Mathematical Occupations (SOC 15)	3.8%	2.4%	2.9%	2.5%	2.8%	2.5%	1.8%	1.6%
Architecture and Engineering Occupations (SOC 17)	4.0%	1.6%	1.3%	1.7%	(0.1%)	1.7%	0.8%	0.8%
Life, Physical, and Social Science Occupations (SOC 19)	3.0%	1.4%	2.3%	1.8%	1.3%	1.7%	0.8%	0.7%
Community and Social Service Occupations (SOC 21)	2.7%	2.3%	2.7%	2.4%	2.1%	2.2%	1.9%	1.4%
Legal Occupations (SOC 23)	(2.8%)	1.6%	1.0%	1.8%	0.7%	1.7%	0.4%	0.7%
Education, Training, and Library Occupations (SOC 25)	1.1%	1.7%	1.8%	1.9%	1.2%	1.7%	0.7%	0.9%
Arts, Design, Entertainment, Sports, and Media Occupations (SOC 27)	(0.3%)	0.8%	1.2%	1.4%	1.2%	1.4%	1.0%	0.5%
Healthcare Practitioners and Technical Occupations (SOC 29)	3.4%	2.2%	3.3%	2.3%	2.4%	2.1%	1.7%	1.3%
Healthcare Support Occupations (SOC 31)	2.8%	2.7%	3.6%	2.8%	2.5%	2.5%	2.1%	1.7%
Protective Service Occupations (SOC 33)	(2.7%)	1.2%	1.7%	1.3%	1.1%	1.1%	0.6%	0.3%
Food Preparation and Serving Related Occupations (SOC 35)	3.9%	1.2%	3.2%	1.5%	2.9%	1.4%	2.2%	0.6%
Building and Grounds Cleaning and Maintenance Occupations (SOC 37)	6.2%	1.5%	2.9%	1.8%	1.9%	1.6%	1.7%	0.9%
Personal Care and Service Occupations (SOC 39)	2.5%	1.5%	2.1%	1.8%	2.3%	1.6%	1.5%	0.8%
Sales and Related Occupations (SOC 41)	1.7%	1.1%	2.3%	1.4%	2.0%	1.3%	1.3%	0.4%
Office and Administrative Support Occupations (SOC 43)	1.9%	0.7%	2.4%	0.8%	1.9%	0.7%	1.3%	(0.1%)
Farming, Fishing, and Forestry Occupations (SOC 45)	0.2%	1.3%	2.8%	1.4%	0.8%	0.4%	0.7%	(0.2%)
Construction and Extraction Occupations (SOC 47)	3.2%	1.8%	3.1%	2.0%	1.8%	2.0%	1.7%	1.1%
Installation, Maintenance, and Repair Occupations (SOC 49)	1.4%	1.1%	2.8%	1.5%	1.9%	1.4%	1.3%	0.5%
Production Occupations (SOC 51)	1.7%	0.5%	1.2%	0.4%	(0.1%)	0.3%	0.6%	(0.7%)
Transportation and Material Moving Occupations (SOC 53)	(1.0%)	1.5%	2.6%	1.2%	1.6%	1.1%	0.9%	0.2%

Source: JobsEQ, 2018q1 - Dallas County Community College District

Industry growth greater than or equal to one percent in the respective region and time frame.

Industry growth is less than or equal to negative one percent in the respective region and time frame.



# Base Analysis Recommendations

In order to narrow down the list of industries for further analysis at the two-digit level, we created a screening process. This process takes into account the growth and concentration (chart quadrant), the stakeholder input from the on-site visit. The industries highlighted in green will be explored further in the following section.

Industry	Addison Concentration	Projected U.S. Growth	Stakeholder Input	Previously Identified Target Industry?	Include in further analysis? Comments
Agriculture, Forestry, Fishing and Hunting (NAICS 11)	Low	0.4%	No	No	No. This industry is very small in the region and has experience a decline. This industry also tends to require a significant amount of available land.
Mining, Quarrying, and Oil and Gas Extraction (NAICS 21)	High	1.4%	No	No	No. This industry is very small in the region and has experience a decline. This industry also tends to require a significant amount of available land.
Utilities (NAICS 22)	Low	0.2%	No	No	No. This is a very small industry in Addison and it is not an industry to focus recruitment efforts on.
Construction (NAICS 23)	Low	1.1%	No	No	No. This industry tends to follow the economy, so growth will happen naturally.
Manufacturing (NAICS 31-33)	Low	(0.6%)	No	No	No. While this has been growing in Addison, the Town lacks the available property needed for manufacturing.
Wholesale Trade (NAICS 42)	High	0.3%	No	No	No. Addison lacks the available property for a large warehouse-type operation.
Retail Trade (NAICS 44-45)	Low	0.3%	Yes	No	No. This industry tends to follow the economy, so growth will happen naturally.
Transportation and Warehousing (NAICS 48-49)	Low	0.6%	No	No	No. Addison lacks the available property for a large warehouse-type operation.
Information (NAICS 51)	High	0.4%	Yes	Yes (information technology)	Yes. Addison has a concentration of these industries already and it has seen growth in the region. It is projected to continue to grow and many industries within this sector are high-growth, high-value companies.

# Base Analysis Recommendations

Industry	Addison Concentration	Projected U.S. Growth	Stakeholder Input	Previously Identified Target Industry?	Include in further analysis? Comments
Finance and Insurance (NAICS 52)	High	0.7%	Yes	Yes (back office for administrative and professional services)	Yes. Addison has an extremely high concentration of these types of industries and it is projected to continue to grow.
Real Estate and Rental and Leasing (NAICS 53)	High	0.6%	No	No	No. This industry tends to follow the economy, so growth will happen naturally.
Professional, Scientific, and Technical Services (NAICS 54)	High	1.2%	Yes	Yes (back office for administrative and professional services, and creative services)	Yes. Addison has an extremely high concentration of these types of industries and it is projected to continue to grow.
Management of Companies and Enterprises (NAICS 55)	High	0.6%	No	Yes (HQ for small and medium-sized entrepreneurs)	Yes. This industry includes regional office operations, which is a previous target industry for Addison and an industry in which it has a unique strength.
Administrative and Support and Waste Management and Remediation Services (NAICS 56)	High	1.0%	No	Yes (back office for administrative)	Yes. Opportunities may exist in this industry for back office operations.
Educational Services (NAICS 61)	Low	0.7%	No	No	No. This is not an industry to focus recruitment efforts on.
Health Care and Social Assistance (NAICS 62)	Low	1.8%	No	No	No. This industry tends to follow the economy, so growth will happen naturally.
Arts, Entertainment, and Recreation (NAICS 71)	Low	0.8%	Yes	No	No. This industry tends to follow the economy, so growth will happen naturally.
Accommodation and Food Services (NAICS 72)	Low	0.7%	Yes	No	Yes. Although this industry tends to follow the economy, we are including an analysis on the restaurant sector in Addison to what opportunities/gaps might exist in the sector.
Other Services (except Public Administration) (NAICS 81)	Low	0.6%	No	No	No. These services tend to be consumer driven and will follow the economy, so growth will happen naturally.
Public Administration (NAICS 92)	Low	0.2%	No	No	No. This is not an industry to focus recruitment efforts on.

# Target Industry Identification Analysis

# Target Industry Analysis - Overview

## Overview

The following target industry analysis follows the same format as the analysis in the previous section. However, this section focuses on the industries identified in the screening of the 2-digit NAICS code industry analysis. In order to determine which specific industries drive the greater region's economy, a 6-digit NAICS code analysis was conducted on the following industries.

- Information (NAICS 51)
- Finance and Insurance (NAICS 52)
- Professional, Scientific, and Technical Services (NAICS 54)
- Management of Companies and Enterprises (NAICS 55)
- Administrative and Support and Waste Management and Remediation Services (NAICS 56)
- Accommodation and Food Services (NAICS 72)

As stated above, this analysis will show, for example, which sub-industries within information are driving the overall industry, which are growing opportunities, and which are declining. This exercise helps provide a deeper understanding of the region and identify possible niche markets, allowing us to more accurately recommend the industries that are the best fit for the Town of Addison, Texas, region.

# Target Industry Analysis - Methodology

## Methodology and Purpose

To identify the region's economic drivers, data on industry concentration and historic growth were gathered for several specific industry clusters; the data covered two regions. The core region is defined as the Town of Addison, Texas. The greater region is defined as including the following counties: Collin, Dallas, Denton, and Tarrant Counties. This region is used throughout the target industry analysis to identify opportunities that may not currently exist in the Town of Addison, but are strong and growing.

The clusters are defined by the North American Industry Classification System (NAICS) and the data for this analysis was licensed from Dallas County Community College District. Note that while JobsEQ provides information on industries and their impact on the local economy, it does not include identities of specific firms.

Our methodology focuses on industry size (measured by number of employees), industry growth or contraction (measured by historic change in number of employees from 2013 to 2018), industry concentration, as well as wages by industry. We used the most recent five-year period for the historical analysis.

Industry concentration is measured using a location quotient methodology. A location quotient measures the presence of industry employment within a specific region compared to national averages. For example, if a region has a location quotient of 1.25 this means the industry's share of regional employment is 25% higher than would be expected based on the industry's share of national employment.

# Target Industry Analysis - Methodology

## Results Presented on Graphs

The various bubble charts, shown on the following pages, graphically show the industry analysis at a six-digit NAICS code level for the greater region.

In each graph, the X-axis is the historic growth or contraction by industry over time; the Y-axis identifies the industry location quotient, and the size of the industry cluster circle represents the number of employees in the region.

The graph breaks into four quadrants, split by industries above and below 0% growth, and those above and below average concentration (LQ = 1.0). The four quadrants reflect four general approaches to the industries, which we use as a starting point and then adjust based on the specific dynamics within a client's region as well as our experience in conducting similar analyses in many diverse regions.

The general approaches to each of the four quadrants are as follows:

- **Stars (Gold):** Positive Growth / Above Average Concentration: Industries that currently drive the economy. They have been positive contributors to economic growth and there is a high-level of existing specialization and economic infrastructure; therefore, the region is likely competitive in those industries. These industries are often ideal targets for growing existing industry and attracting new industry.
- **Mainstays (Blue):** Negative Growth / Above Average Concentration: These industries represent a very important part of the economy, but they have not been contributing to growth, and may in fact be contributing to job loss. It is important that these industries be aggressively supported through retention efforts to ensure they can continue to play a significant role in the economy.
- **Opportunities (Green):** Positive Growth / Below Average Concentration: These industries have been growing, but are not currently well represented in the regional economy. If the regional economic infrastructure is able to support the operational requirements of these businesses, there is the opportunity to develop future stars. To foster such opportunities, economic development organizations need to develop needed infrastructure and be engaged in attraction.
- **Reactive (Red):** Negative Growth / Below Average Concentration: These industries are not well represented in the region and have not been growing. As such, they should only be targeted in reaction to some need or opportunity, as such need or opportunity arises.



# Target Industry Analysis - Methodology

## Talent Score Represented in Tables

The top five occupations for each industry subsector were analyzed in terms of concentration and projected growth in Addison and the greater region. The occupations were given a score based on their relative importance to the economy in Addison, and a score was created for each subsector or a group of subsectors. The talent score shows the extent to which Addison and the Greater Region have the talent available to support an identified industry (NAICS code).

The top 25% of talent scores can be found highlighted in the tables on the following pages. The raw data used to generate the scores will be provided in a separate spreadsheet.

# Target Industry Analysis - Information

# Target Industry Analysis – Information (NAICS 51)

## SUMMARY OF INFORMATION

This industry employs over 82,000 people in the greater region, with Wired Telecommunications Carriers (NAICS 517311) being the largest subsector of employment. Addison has a significantly higher concentration than the greater region in the following subsectors of this industry:

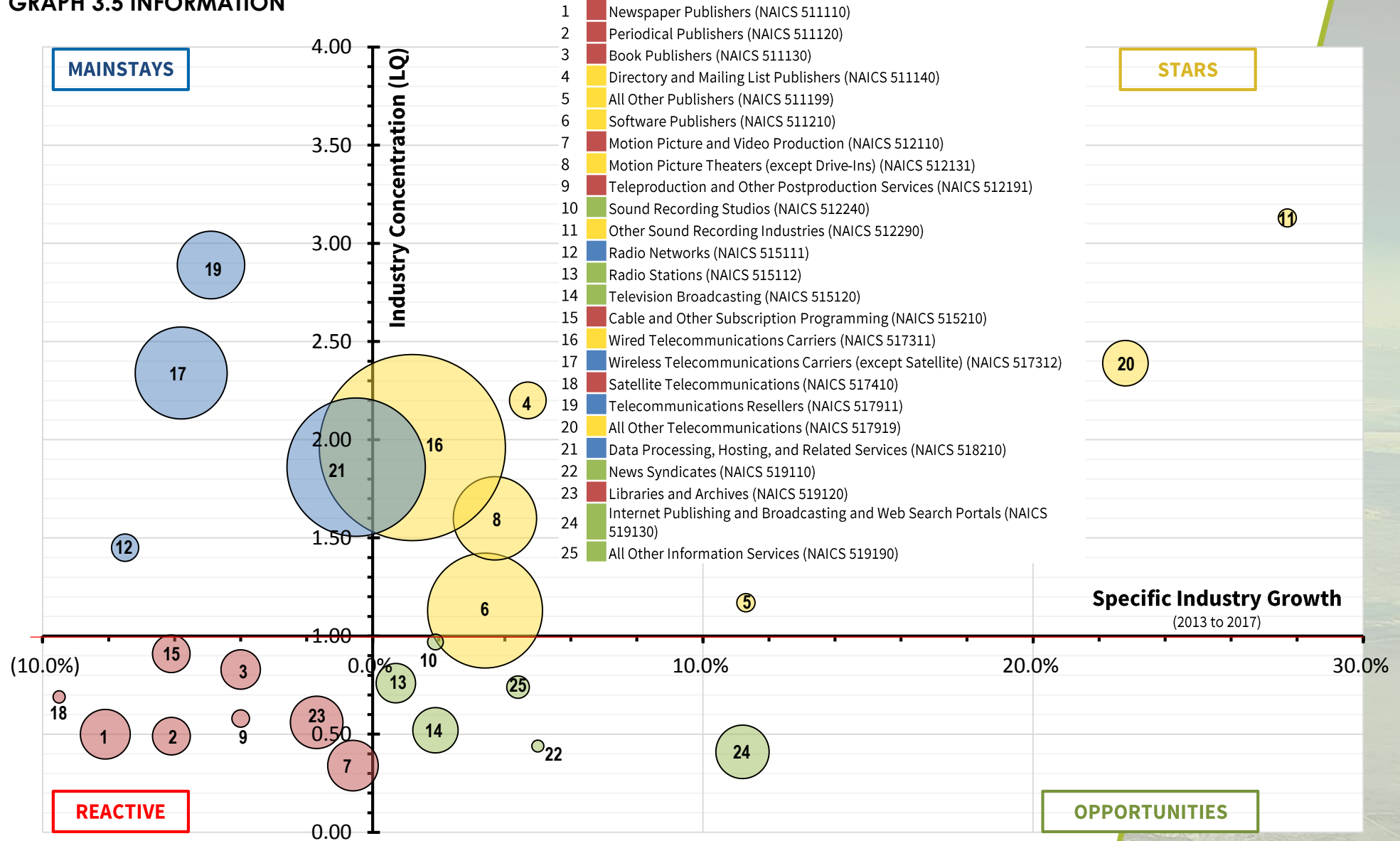
- Periodical Publishers (NAICS 511120)
- All Other Publishers (NAICS 511199)
- Software Publishers (NAICS 511210)
- Sound Recording Studios (NAICS 512240)
- Other Sound Recording Industries (NAICS 512290)
- Cable and Other Subscription Programming (NAICS 515210)
- Telecommunications Resellers (NAICS 517911)
- Data Processing, Hosting, and Related Services (NAICS 518210)
- News Syndicates (NAICS 519110)

Wages are mostly higher in Addison when compared to the greater region, state and national averages, with only about 30% of the subsectors in this industry having lower wages than at least two comparison regions.

Less than half of subsectors within this industry have experienced significant growth over the past 5-year period in Addison, and about the same amount are projected to experience significant growth over the next 10-year period as well. Three subsectors have experienced significant growth in all regions and all time periods (*entire row highlighted green*): Software Publishers (NAICS 511210), Internet Publishing and Broadcasting and Web Search Portals (NAICS 519130), and All Other Information Services (NAICS 519190).

# Target Industry Analysis – Information (NAICS 51)

GRAPH 3.5 INFORMATION



Circle Size = Number of employees in the Greater Region  
Source: JobsEQ, 2018 - Dallas County Community College District

Total Employees in Greater Region: 82,341

○ = 1,500 employees

# Target Industry Analysis – Information (NAICS 51)

Table 3.5.A: Existing Industry Concentration Comparison	Addison Total Employment	Greater Region Total Employment	Texas Total Employment	Addison Location Quotient	Greater Region Location Quotient	Texas Location Quotient
Newspaper Publishers (NAICS 511110)	4	1,865	9,122	0.04	0.5	0.65
Periodical Publishers (NAICS 511120)	81	1,089	4,757	1.13	0.49	0.56
Book Publishers (NAICS 511130)	15	1,183	3,651	0.32	0.83	0.68
Directory and Mailing List Publishers (NAICS 511140)	6	1,032	1,451	0.39	2.2	0.81
All Other Publishers (NAICS 511199)	21	275	1,133	2.78	1.17	1.27
Software Publishers (NAICS 511210)	535	9,640	20,917	1.95	1.13	0.64
Motion Picture and Video Production (NAICS 512110)	52	1,911	6,563	0.28	0.34	0.31
Motion Picture Theaters (except Drive-Ins) (NAICS 512131)	142	5,109	17,802	1.38	1.6	1.46
Teleproduction and Other Postproduction Services (NAICS 512191)	2	253	651	0.11	0.58	0.39
Sound Recording Studios (NAICS 512240)	24	205	712	3.59	0.97	0.88
Other Sound Recording Industries (NAICS 512290)	10	266	396	3.78	3.13	1.22
Radio Networks (NAICS 515111)	12	581	1,302	0.96	1.45	0.85
Radio Stations (NAICS 515112)	55	1,191	5,083	1.09	0.76	0.85
Television Broadcasting (NAICS 515120)	61	1,560	7,771	0.64	0.52	0.68
Cable and Other Subscription Programming (NAICS 515210)	57	1,081	1,823	1.48	0.91	0.4
Wired Telecommunications Carriers (NAICS 517311)	254	25,137	58,190	0.61	1.96	1.19
Wireless Telecommunications Carriers (except Satellite) (NAICS 517312)	87	6,214	13,723	1.02	2.34	1.36
Satellite Telecommunications (NAICS 517410)	0	130	552	0	0.69	0.77
Telecommunications Resellers (NAICS 517911)	753	3,379	7,482	20.01	2.89	1.68
All Other Telecommunications (NAICS 517919)	28	1,567	3,105	1.31	2.39	1.24
Data Processing, Hosting, and Related Services (NAICS 518210)	652	13,935	34,311	2.7	1.86	1.2
News Syndicates (NAICS 519110)	58	125	355	6.38	0.44	0.33
Libraries and Archives (NAICS 519120)	10	2,070	7,991	0.09	0.56	0.56
Internet Publishing and Broadcasting and Web Search Portals (NAICS 519130)	47	2,140	6,468	0.28	0.41	0.32
All Other Information Services (NAICS 519190)	10	403	1,662	0.55	0.74	0.8

Source: JobsEQ, 2018 - Dallas County Community College District

Addison LQ > than Greater Region (by  $\geq 0.5$ )

Addison LQ < than Greater Region (by  $\geq 0.5$ )

Addison LQ and Greater Region LQ are not significantly different

# Target Industry Analysis – Information (NAICS 51)

Table 3.5.B: Existing Industry Wage Comparison	Addison Average Cluster Wage (Annual)	Greater Region Average Cluster Wage (Annual)	Texas Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Newspaper Publishers (NAICS 511110)	\$61,537	\$68,335	\$49,608	\$50,441
Periodical Publishers (NAICS 511120)	\$63,862	\$57,189	\$64,334	\$88,999
Book Publishers (NAICS 511130)	\$81,709	\$75,761	\$67,111	\$81,038
Directory and Mailing List Publishers (NAICS 511140)	\$54,788	\$65,228	\$67,772	\$74,756
All Other Publishers (NAICS 511199)	\$119,930	\$123,678	\$92,143	\$66,008
Software Publishers (NAICS 511210)	\$127,826	\$127,805	\$125,476	\$150,222
Motion Picture and Video Production (NAICS 512110)	\$52,794	\$53,748	\$51,616	\$88,550
Motion Picture Theaters (except Drive-Ins) (NAICS 512131)	\$23,142	\$18,864	\$15,968	\$14,661
Teleproduction and Other Postproduction Services (NAICS 512191)	\$49,539	\$58,703	\$67,657	\$86,560
Sound Recording Studios (NAICS 512240)	\$43,542	\$33,646	\$36,301	\$44,695
Other Sound Recording Industries (NAICS 512290)	\$91,680	\$87,430	\$74,143	\$62,125
Radio Networks (NAICS 515111)	\$78,289	\$77,329	\$64,557	\$68,972
Radio Stations (NAICS 515112)	\$74,812	\$69,526	\$61,889	\$55,389
Television Broadcasting (NAICS 515120)	\$101,764	\$101,600	\$71,252	\$94,120
Cable and Other Subscription Programming (NAICS 515210)	\$127,441	\$126,661	\$105,899	\$116,764
Wired Telecommunications Carriers (NAICS 517311)	\$115,905	\$110,397	\$90,176	\$86,862
Wireless Telecommunications Carriers (except Satellite) (NAICS 517312)	\$126,494	\$113,730	\$88,168	\$85,199
Satellite Telecommunications (NAICS 517410)	n/a	\$125,222	\$122,623	\$113,610
Telecommunications Resellers (NAICS 517911)	\$76,678	\$73,194	\$74,967	\$81,898
All Other Telecommunications (NAICS 517919)	\$109,086	\$128,136	\$109,697	\$114,191
Data Processing, Hosting, and Related Services (NAICS 518210)	\$106,817	\$115,110	\$103,380	\$109,364
News Syndicates (NAICS 519110)	\$91,062	\$85,554	\$82,558	\$119,429
Libraries and Archives (NAICS 519120)	\$46,612	\$43,440	\$35,472	\$34,374
Internet Publishing and Broadcasting and Web Search Portals (NAICS 519130)	\$105,960	\$90,196	\$84,706	\$216,473
All Other Information Services (NAICS 519190)	\$97,428	\$94,887	\$86,873	\$104,621

Source: JobsEQ, 2018 - Dallas County Community College District

Addison wages < 2 or more region wages  
Addison wages > 2 or more region wages



# Target Industry Analysis – Information (NAICS 51)

Table 3.5.C: Existing Industry Growth Comparison	Addison 5-year Growth (2013 – 2017)	Addison 10-year Projected Growth (2017 – 2027)	Greater Region 5-year Growth (2013 - 2017)	Greater Region 10-year Projected Growth (2017 - 2027)	Texas 5-year Growth (2013-2017)	Texas 10-year Projected Growth (2017-2027)	U.S. 5-year Growth (2013 - 2017)	U.S. 10-year Projected Growth (2017 - 2027)
Newspaper Publishers (NAICS 511110)	(6.3%)	(0.7%)	(8.1%)	(2.4%)	(6.5%)	(3.1%)	(6.3%)	(4.1%)
Periodical Publishers (NAICS 511120)	(10.2%)	(1.6%)	(6.1%)	(1.1%)	(1.2%)	(1.1%)	(3.4%)	(2.4%)
Book Publishers (NAICS 511130)	5.6%	(1.4%)	(4.0%)	(1.3%)	(1.5%)	(1.1%)	(2.6%)	(2.4%)
Directory and Mailing List Publishers (NAICS 511140)	18.7%	(1.5%)	4.7%	(1.6%)	(1.9%)	(1.4%)	(7.3%)	(2.5%)
All Other Publishers (NAICS 511199)	17.1%	(1.7%)	11.3%	(1.0%)	10.0%	(1.1%)	(2.2%)	(2.2%)
Software Publishers (NAICS 511210)	1.3%	2.4%	3.4%	2.7%	3.0%	2.8%	5.6%	1.8%
Motion Picture and Video Production (NAICS 512110)	(18.3%)	1.8%	(0.6%)	2.1%	8.5%	2.4%	2.2%	1.1%
Motion Picture Theaters (except Drive-Ins) (NAICS 512131)	13.8%	0.8%	3.7%	1.3%	6.9%	1.1%	3.0%	0.1%
Teleproduction and Other Postproduction Services (NAICS 512191)	2.5%	1.4%	(4.0%)	2.0%	1.1%	2.1%	0.5%	1.1%
Sound Recording Studios (NAICS 512240)	25.6%	0.0%	1.9%	1.1%	(0.4%)	1.0%	(1.0%)	(0.1%)
Other Sound Recording Industries (NAICS 512290)	43.1%	(0.1%)	27.7%	0.1%	12.9%	0.3%	2.6%	(0.5%)
Radio Networks (NAICS 515111)	(19.9%)	(2.2%)	(7.5%)	(1.9%)	(6.4%)	(2.0%)	(3.0%)	(3.0%)
Radio Stations (NAICS 515112)	19.3%	(2.2%)	0.7%	(2.0%)	(1.5%)	(2.1%)	(1.7%)	(3.1%)
Television Broadcasting (NAICS 515120)	(8.3%)	1.1%	1.9%	1.1%	0.3%	1.0%	1.9%	0.3%
Cable and Other Subscription Programming (NAICS 515210)	(9.6%)	(1.6%)	(6.1%)	(1.5%)	(15.9%)	(1.5%)	(6.6%)	(2.5%)
Wired Telecommunications Carriers (NAICS 517311)	(11.6%)	(1.0%)	1.2%	(0.8%)	1.2%	(0.8%)	(0.4%)	(1.9%)
Wireless Telecommunications Carriers (except Satellite) (NAICS 517312)	(1.4%)	1.1%	(5.8%)	1.6%	(8.0%)	1.4%	(5.4%)	0.4%
Satellite Telecommunications (NAICS 517410)	n/a	1.4%	(9.5%)	1.4%	(4.8%)	1.0%	(3.9%)	(0.2%)
Telecommunications Resellers (NAICS 517911)	12.1%	(1.2%)	(4.9%)	(1.0%)	(2.9%)	(0.9%)	(8.7%)	(2.1%)
All Other Telecommunications (NAICS 517919)	(32.1%)	(1.2%)	22.8%	(0.1%)	11.9%	(0.3%)	2.0%	(2.0%)
Data Processing, Hosting, and Related Services (NAICS 518210)	3.3%	1.9%	(0.5%)	2.5%	2.2%	2.3%	4.0%	1.2%
News Syndicates (NAICS 519110)	12.1%	4.5%	5.0%	4.2%	6.4%	4.3%	(1.1%)	3.8%
Libraries and Archives (NAICS 519120)	(1.6%)	4.3%	(1.7%)	4.7%	(0.1%)	4.5%	0.4%	4.0%
Internet Publishing and Broadcasting and Web Search Portals (NAICS 519130)	10.6%	4.3%	11.2%	4.4%	5.3%	4.5%	10.9%	3.8%
All Other Information Services (NAICS 519190)	1.3%	4.2%	4.4%	4.1%	2.0%	4.3%	11.2%	3.5%

Source: JobsEQ, 2018 - Dallas County Community College District

Industry growth greater than or equal to one percent in the respective region and time frame.

Industry growth is less than or equal to negative one percent in the respective region and time frame.

# Target Industry Analysis – Information (NAICS 51)

Rank	Table 3.5.D Ranked by Number of Jobs, 5-Year Growth and Cluster Concentration	Regional Number of Jobs (2017)	Regional 5-year Growth	Regional Cluster Concentration (LQ)
1	Wired Telecommunications Carriers (NAICS 517311)	25,137 (1)	1.2%	1.96 (6)
2	Data Processing, Hosting, and Related Services (NAICS 518210)	13,935 (2)	(0.5%)	1.86 (7)
3	Software Publishers (NAICS 511210)	9,640 (3)	3.4% (9)	1.13
4	Wireless Telecommunications Carriers (except Satellite) (NAICS 517312)	6,214 (4)	(5.8%)	2.34 (4)
5	Motion Picture Theaters (except Drive-Ins) (NAICS 512131)	5,109 (5)	3.7% (8)	1.6 (8)
6	Telecommunications Resellers (NAICS 517911)	3,379 (6)	(4.9%)	2.89 (2)
7	Internet Publishing and Broadcasting and Web Search Portals (NAICS 519130)	2,140 (7)	11.2% (4)	0.41
8	Libraries and Archives (NAICS 519120)	2,070 (8)	(1.7%)	0.56
9	Motion Picture and Video Production (NAICS 512110)	1,911 (9)	(0.6%)	0.34
10	Newspaper Publishers (NAICS 511110)	1,865 (10)	(8.1%)	0.5
11	All Other Telecommunications (NAICS 517919)	1,567	22.8% (2)	2.39 (3)
12	Television Broadcasting (NAICS 515120)	1,560	1.9% (10)*	0.52
13	Radio Stations (NAICS 515112)	1,191	0.7%	0.76
14	Book Publishers (NAICS 511130)	1,183	(4.0%)	0.83
15	Periodical Publishers (NAICS 511120)	1,089	(6.1%)	0.49
16	Cable and Other Subscription Programming (NAICS 515210)	1,081	(6.1%)	0.91
17	Directory and Mailing List Publishers (NAICS 511140)	1,032	4.7% (6)	2.2 (5)
18	Radio Networks (NAICS 515111)	581	(7.5%)	1.45 (9)
19	All Other Information Services (NAICS 519190)	403	4.4% (7)	0.74
20	All Other Publishers (NAICS 511199)	275	11.3% (3)	1.17 (10)
21	Other Sound Recording Industries (NAICS 512290)	266	27.7% (1)	3.13 (1)
22	Teleproduction and Other Postproduction Services (NAICS 512191)	253	(4.0%)	0.58
23	Sound Recording Studios (NAICS 512240)	205	1.9% (10)*	0.97
24	Satellite Telecommunications (NAICS 517410)	130	(9.5%)	0.69
25	News Syndicates (NAICS 519110)	125	5.0% (5)	0.44

Source: JobsEQ, 2018 - Dallas County Community College District

Top ten (10) in each (# Jobs, Growth, LQ)

\* Indicates a tie

# Target Industry Analysis – Information (NAICS 51)

Table 3.5.E: Existing Industry Talent Comparison	Addison Average Concentration	Greater Region Average Concentration	Addison Average Projected Growth	Greater Region Average Projected Growth	Addison Talent Score
Newspaper Publishers (NAICS 511110)	0.97	0.82	0.88%	0.78%	209
Periodical Publishers (NAICS 511120)	1.03	0.87	1.00%	0.94%	196
Book Publishers (NAICS 511130)					
Directory and Mailing List Publishers (NAICS 511140)					
All Other Publishers (NAICS 511199)					
Software Publishers (NAICS 511210)	2.29	1.31	1.60%	1.88%	58
Motion Picture and Video Production (NAICS 512110)	0.66	0.82	0.94%	1.44%	202
Motion Picture Theaters (except Drive-Ins) (NAICS 512131)					
Teleproduction and Other Postproduction Services (NAICS 512191)					
Sound Recording Studios (NAICS 512240)	1.03	0.90	1.20%	1.58%	162
Other Sound Recording Industries (NAICS 512290)					
Radio Networks (NAICS 515111)	0.98	0.85	0.42%	0.72%	212
Radio Stations (NAICS 515112)					
Television Broadcasting (NAICS 515120)	0.74	0.67	0.60%	0.90%	219
Cable and Other Subscription Programming (NAICS 515210)	1.30	1.35	0.80%	1.22%	153
Wired Telecommunications Carriers (NAICS 517311)	1.70	1.58	0.68%	0.98%	128
Wireless Telecommunications Carriers (except Satellite) (NAICS 517312)					
Satellite Telecommunications (NAICS 517410)					
Telecommunications Resellers (NAICS 517911)					
All Other Telecommunications (NAICS 517919)					
Data Processing, Hosting, and Related Services (NAICS 518210)	2.28	1.39	1.94%	2.24%	35
News Syndicates (NAICS 519110)	1.77	1.16	1.98%	2.20%	49
Libraries and Archives (NAICS 519120)					
Internet Publishing and Broadcasting and Web Search Portals (NAICS 519130)					
All Other Information Services (NAICS 519190)					

Source: JobsEQ, 2018 - Dallas County Community College District

Top 25% of All Talent Scores

# Target Industry Analysis – Finance and Insurance

# Target Industry Analysis – Finance (NAICS 521 – 523)

## SUMMARY OF FINANCE

This industry employs over 134,000 people in the greater region, with Commercial Banking (NAICS 522110) being the largest subsector of employment. Addison has a significantly higher concentration than the greater region in most of the subsectors of this industry, with the following subsectors having a concentration more than 10.0:

- Other Depository Credit Intermediation (NAICS 522190)
- Real Estate Credit (NAICS 522292)
- International Trade Financing (NAICS 522293)
- Secondary Market Financing (NAICS 522294)
- Financial Transactions Processing, Reserve, and Clearinghouse Activities (NAICS 522320)
- Trust, Fiduciary, and Custody Activities (NAICS 523991)

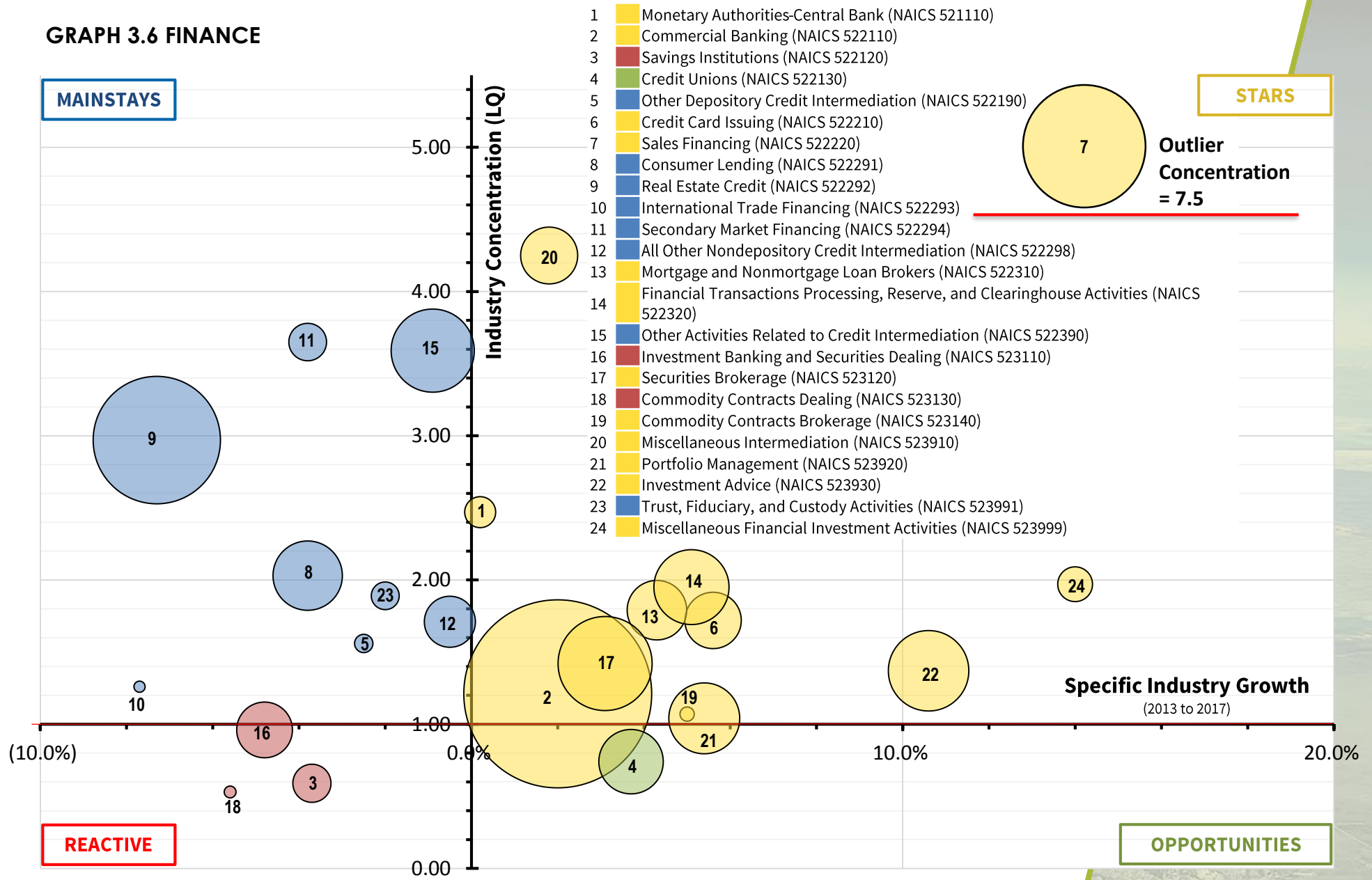
Wages in Addison are higher in most subsectors of this industry when compared with the greater region, state and national averages, with only about 30% of the subsectors in this industry having lower wages than at least two of the comparison regions.

More than half of subsectors within this industry have experienced significant growth over the past 5-year period in Addison, and the same number are projected to experience significant growth over the next 10-year period as well. Five subsectors have experienced significant growth in all regions and all time periods (*entire row highlighted green*):

- Sales Financing (NAICS 522220)
- Financial Transactions Processing, Reserve, and Clearinghouse Activities (NAICS 522320)
- Portfolio Management (NAICS 523920)
- Investment Advice (NAICS 523930)
- Miscellaneous Financial Investment Activities (NAICS 523999)

# Target Industry Analysis – Finance (NAICS 521 – 523)

GRAPH 3.6 FINANCE



Circle Size = Number of employees in the Greater Region  
Source: JobsEQ, 2018 - Dallas County Community College District

Total Employees in Greater Region: 134,291

○ = 5,500 employees



# Target Industry Analysis – Finance (NAICS 521 – 523)

Table 3.6.A: Existing Industry Concentration Comparison	Addison Total Employment	Greater Region Total Employment	Texas Total Employment	Addison Location Quotient	Greater Region Location Quotient	Texas Location Quotient
Monetary Authorities-Central Bank (NAICS 521110)	54	1,044	1,508	3.95	2.47	0.94
Commercial Banking (NAICS 522110)	1,320	35,554	118,533	1.4	1.21	1.06
Savings Institutions (NAICS 522120)	299	1,540	7,707	3.56	0.59	0.77
Credit Unions (NAICS 522130)	54	4,293	23,779	0.29	0.74	1.07
Other Depository Credit Intermediation (NAICS 522190)	179	378	923	22.94	1.56	1
Credit Card Issuing (NAICS 522210)	147	3,304	6,966	2.38	1.72	0.95
Sales Financing (NAICS 522220)	362	15,954	19,278	5.29	7.5	2.38
Consumer Lending (NAICS 522291)	57	4,925	14,480	0.74	2.03	1.57
Real Estate Credit (NAICS 522292)	3,738	16,418	29,178	21.03	2.97	1.39
International Trade Financing (NAICS 522293)	102	155	393	25.88	1.26	0.84
Secondary Market Financing (NAICS 522294)	961	1,498	3,376	72.71	3.65	2.16
All Other Nondepository Credit Intermediation (NAICS 522298)	333	2,715	10,571	6.51	1.71	1.75
Mortgage and Nonmortgage Loan Brokers (NAICS 522310)	183	3,671	6,874	2.77	1.79	0.88
Financial Transactions Processing, Reserve, and Clearinghouse Activities (NAICS 522320)	984	5,771	9,241	10.32	1.95	0.82
Other Activities Related to Credit Intermediation (NAICS 522390)	87	7,084	11,429	1.38	3.59	1.52
Investment Banking and Securities Dealing (NAICS 523110)	54	3,238	7,481	0.5	0.96	0.58
Securities Brokerage (NAICS 523120)	123	9,013	19,254	0.6	1.42	0.8
Commodity Contracts Dealing (NAICS 523130)	35	170	2,127	3.41	0.53	1.74
Commodity Contracts Brokerage (NAICS 523140)	16	242	945	2.26	1.07	1.1
Miscellaneous Intermediation (NAICS 523910)	164	3,365	7,206	6.44	4.25	2.39
Portfolio Management (NAICS 523920)	558	5,173	14,056	3.49	1.04	0.74
Investment Advice (NAICS 523930)	641	6,654	21,359	4.11	1.37	1.16
Trust, Fiduciary, and Custody Activities (NAICS 523991)	165	837	1,584	11.6	1.89	0.94
Miscellaneous Financial Investment Activities (NAICS 523999)	178	1,295	2,090	8.43	1.97	0.83

Source: JobsEQ, 2018 - Dallas County Community College District

Addison LQ > than Greater Region (by  $\geq 0.5$ )

Addison LQ < than Greater Region (by  $\geq 0.5$ )

Addison LQ and Greater Region LQ are not significantly different

# Target Industry Analysis – Finance (NAICS 521 – 523)

Table 3.6.B: Existing Industry Wage Comparison	Addison Average Cluster Wage (Annual)	Greater Region Average Cluster Wage (Annual)	Texas Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Monetary Authorities-Central Bank (NAICS 521110)	\$102,679	\$102,657	\$101,534	\$118,391
Commercial Banking (NAICS 522110)	\$110,380	\$95,908	\$76,748	\$82,703
Savings Institutions (NAICS 522120)	\$125,912	\$98,559	\$75,566	\$71,018
Credit Unions (NAICS 522130)	\$60,511	\$60,407	\$50,848	\$51,939
Other Depository Credit Intermediation (NAICS 522190)	\$117,498	\$117,110	\$86,953	\$77,060
Credit Card Issuing (NAICS 522210)	\$98,680	\$171,008	\$136,262	\$126,527
Sales Financing (NAICS 522220)	\$100,600	\$86,922	\$86,928	\$95,970
Consumer Lending (NAICS 522291)	\$77,631	\$82,094	\$61,376	\$64,291
Real Estate Credit (NAICS 522292)	\$101,818	\$94,072	\$97,722	\$101,342
International Trade Financing (NAICS 522293)	\$92,731	\$92,459	\$109,712	\$162,865
Secondary Market Financing (NAICS 522294)	\$132,226	\$129,491	\$109,652	\$128,642
All Other Nondepository Credit Intermediation (NAICS 522298)	\$70,704	\$71,487	\$51,034	\$68,902
Mortgage and Nonmortgage Loan Brokers (NAICS 522310)	\$96,525	\$105,101	\$96,508	\$96,960
Financial Transactions Processing, Reserve, and Clearinghouse Activities (NAICS 522320)	\$73,697	\$84,076	\$80,518	\$96,455
Other Activities Related to Credit Intermediation (NAICS 522390)	\$76,292	\$77,307	\$65,858	\$72,921
Investment Banking and Securities Dealing (NAICS 523110)	\$224,224	\$225,206	\$236,243	\$265,774
Securities Brokerage (NAICS 523120)	\$164,485	\$144,552	\$156,868	\$214,807
Commodity Contracts Dealing (NAICS 523130)	\$57,102	\$84,099	\$202,928	\$221,720
Commodity Contracts Brokerage (NAICS 523140)	\$107,559	\$108,449	\$195,092	\$161,295
Miscellaneous Intermediation (NAICS 523910)	\$156,433	\$151,331	\$160,933	\$185,902
Portfolio Management (NAICS 523920)	\$211,362	\$187,590	\$156,854	\$252,832
Investment Advice (NAICS 523930)	\$158,594	\$137,066	\$123,300	\$158,320
Trust, Fiduciary, and Custody Activities (NAICS 523991)	\$126,942	\$116,630	\$97,053	\$110,242
Miscellaneous Financial Investment Activities (NAICS 523999)	\$158,154	\$128,199	\$116,719	\$146,775

Source: JobsEQ, 2018 - Dallas County Community College District

Addison wages < 2 or more region wages  
Addison wages > 2 or more region wages

# Target Industry Analysis – Finance (NAICS 521 – 523)

Table 3.6.C: Existing Industry Growth Comparison	Addison 5-year Growth (2013 – 2017)	Addison 10-year Projected Growth (2017 – 2027)	Greater Region 5-year Growth (2013 - 2017)	Greater Region 10-year Projected Growth (2017 - 2027)	Texas 5-year Growth (2013-2017)	Texas 10-year Projected Growth (2017-2027)	U.S. 5-year Growth (2013 - 2017)	U.S. 10-year Projected Growth (2017 - 2027)
Monetary Authorities-Central Bank (NAICS 521110)	8.3%	(1.4%)	0.2%	(1.4%)	0.8%	(1.2%)	2.0%	(2.3%)
Commercial Banking (NAICS 522110)	(9.6%)	0.5%	2.0%	0.9%	0.3%	0.6%	0.1%	(0.3%)
Savings Institutions (NAICS 522120)	40.9%	0.5%	(3.7%)	0.7%	(9.1%)	0.6%	(7.8%)	(0.3%)
Credit Unions (NAICS 522130)	(5.0%)	0.5%	3.7%	0.7%	2.7%	0.5%	2.8%	(0.3%)
Other Depository Credit Intermediation (NAICS 522190)	7.6%	0.5%	(2.5%)	0.5%	3.0%	0.2%	(3.4%)	(0.3%)
Credit Card Issuing (NAICS 522210)	2.7%	1.7%	5.6%	1.8%	5.2%	2.0%	(4.4%)	1.1%
Sales Financing (NAICS 522220)	10.4%	1.7%	14.2%	2.1%	11.6%	2.1%	3.8%	1.1%
Consumer Lending (NAICS 522291)	(40.2%)	2.3%	(3.8%)	2.5%	(0.3%)	2.3%	2.6%	1.7%
Real Estate Credit (NAICS 522292)	20.2%	2.4%	(7.3%)	2.7%	(1.8%)	2.7%	3.2%	1.7%
International Trade Financing (NAICS 522293)	(5.1%)	2.4%	(7.7%)	2.4%	(3.6%)	2.4%	(2.8%)	1.7%
Secondary Market Financing (NAICS 522294)	(8.5%)	2.4%	(3.8%)	2.4%	1.5%	2.5%	0.2%	1.7%
All Other Nondepository Credit Intermediation (NAICS 522298)	26.9%	2.4%	(0.5%)	2.5%	0.0%	2.5%	1.1%	1.7%
Mortgage and Nonmortgage Loan Brokers (NAICS 522310)	(20.4%)	2.7%	4.3%	3.4%	5.5%	3.4%	6.1%	2.1%
Financial Transactions Processing, Reserve, and Clearinghouse Activities (NAICS 522320)	3.2%	2.7%	5.1%	3.1%	4.7%	3.1%	2.8%	2.1%
Other Activities Related to Credit Intermediation (NAICS 522390)	(8.7%)	2.7%	(0.9%)	2.8%	(0.6%)	2.9%	(0.7%)	2.1%
Investment Banking and Securities Dealing (NAICS 523110)	6.9%	0.7%	(4.8%)	0.8%	(0.6%)	0.8%	0.1%	(0.1%)
Securities Brokerage (NAICS 523120)	(20.4%)	0.7%	3.1%	0.8%	3.2%	0.8%	0.5%	(0.1%)
Commodity Contracts Dealing (NAICS 523130)	6.0%	0.6%	(5.6%)	1.5%	7.9%	0.9%	0.7%	(0.1%)
Commodity Contracts Brokerage (NAICS 523140)	5.3%	0.7%	5.0%	0.9%	(0.6%)	0.9%	(3.9%)	(0.1%)
Miscellaneous Intermediation (NAICS 523910)	0.9%	2.5%	1.8%	2.6%	0.8%	2.6%	0.5%	1.8%
Portfolio Management (NAICS 523920)	32.4%	2.5%	5.4%	2.5%	3.8%	2.6%	5.8%	1.9%
Investment Advice (NAICS 523930)	21.3%	2.5%	10.6%	2.6%	13.9%	2.7%	5.1%	1.9%
Trust, Fiduciary, and Custody Activities (NAICS 523991)	71.3%	2.6%	(2.0%)	2.6%	0.0%	2.5%	(1.6%)	1.9%
Miscellaneous Financial Investment Activities (NAICS 523999)	74.5%	2.6%	14.0%	2.7%	9.3%	2.7%	3.7%	2.0%

Source: JobsEQ, 2018 - Dallas County Community College District

Industry growth greater than or equal to one percent in the respective region and time frame.

Industry growth is less than or equal to negative one percent in the respective region and time frame.

# Target Industry Analysis – Finance (NAICS 521 – 523)

Rank	Table 3.6.D Ranked by Number of Jobs, 5-Year Growth and Cluster Concentration	Regional Number of Jobs (2017)	Regional 5-year Growth	Regional Cluster Concentration (LQ)
1	Commercial Banking (NAICS 522110)	35,554 (1)	2.0%	1.21
2	Real Estate Credit (NAICS 522292)	16,418 (2)	(7.3%)	2.97 (5)
3	Sales Financing (NAICS 522220)	15,954 (3)	14.2% (1)	7.5 (1)
4	Securities Brokerage (NAICS 523120)	9,013 (4)	3.1% (10)	1.42
5	Other Activities Related to Credit Intermediation (NAICS 522390)	7,084 (5)	(0.9%)	3.59 (4)
6	Investment Advice (NAICS 523930)	6,654 (6)	10.6% (3)	1.37
7	Financial Transactions Processing, Reserve, and Clearinghouse Activities (NAICS 522320)	5,771 (7)	5.1% (6)	1.95 (9)
8	Portfolio Management (NAICS 523920)	5,173 (8)	5.4% (5)	1.04
9	Consumer Lending (NAICS 522291)	4,925 (9)	(3.8%)	2.03 (7)
10	Credit Unions (NAICS 522130)	4,293 (10)	3.7% (9)	0.74
11	Mortgage and Nonmortgage Loan Brokers (NAICS 522310)	3,671	4.3% (8)	1.79
12	Miscellaneous Intermediation (NAICS 523910)	3,365	1.8%	4.25 (2)
13	Credit Card Issuing (NAICS 522210)	3,304	5.6% (4)	1.72
14	Investment Banking and Securities Dealing (NAICS 523110)	3,238	(4.8%)	0.96
15	All Other Nondepository Credit Intermediation (NAICS 522298)	2,715	(0.5%)	1.71
16	Savings Institutions (NAICS 522120)	1,540	(3.7%)	0.59
17	Secondary Market Financing (NAICS 522294)	1,498	(3.8%)	3.65 (3)
18	Miscellaneous Financial Investment Activities (NAICS 523999)	1,295	14.0% (2)	1.97 (8)
19	Monetary Authorities-Central Bank (NAICS 521110)	1,044	0.2%	2.47 (6)
20	Trust, Fiduciary, and Custody Activities (NAICS 523991)	837	(2.0%)	1.89 (10)
21	Other Depository Credit Intermediation (NAICS 522190)	378	(2.5%)	1.56
22	Commodity Contracts Brokerage (NAICS 523140)	242	5.0% (7)	1.07
23	Commodity Contracts Dealing (NAICS 523130)	170	(5.6%)	0.53
24	International Trade Financing (NAICS 522293)	155	(7.7%)	1.26

Source: JobsEQ, 2018 - Dallas County Community College District

Top ten (10) in each (# Jobs, Growth, LQ)

\* Indicates a tie

# Target Industry Analysis – Finance (NAICS 521 – 523)

Table 3.6.E: Existing Industry Talent Comparison	Addison Average Concentration	Greater Region Average Concentration	Addison Average Projected Growth	Greater Region Average Projected Growth	Addison Talent Score
Monetary Authorities-Central Bank (NAICS 521110)	2.03	1.16	2.36%	2.40%	40
Commercial Banking (NAICS 522110)	3.85	1.56	1.76%	1.72%	37
Savings Institutions (NAICS 522120)					
Credit Unions (NAICS 522130)					
Other Depository Credit Intermediation (NAICS 522190)					
Mortgage and Nonmortgage Loan Brokers (NAICS 522310)					
Financial Transactions Processing, Reserve, and Clearinghouse Activities (NAICS 522320)					
Other Activities Related to Credit Intermediation (NAICS 522390)					
Credit Card Issuing (NAICS 522210)	3.85	1.56	1.62%	1.80%	36
Sales Financing (NAICS 522220)	3.66	1.46	1.56%	1.62%	60
Consumer Lending (NAICS 522291)					
Real Estate Credit (NAICS 522292)					
International Trade Financing (NAICS 522293)					
Secondary Market Financing (NAICS 522294)					
All Other Nondepository Credit Intermediation (NAICS 522298)					
Investment Banking and Securities Dealing (NAICS 523110)	2.63	1.40	2.20%	1.98%	32
Securities Brokerage (NAICS 523120)					
Commodity Contracts Dealing (NAICS 523130)					
Commodity Contracts Brokerage (NAICS 523140)					
Miscellaneous Intermediation (NAICS 523910)					
Portfolio Management (NAICS 523920)					
Investment Advice (NAICS 523930)					
Trust, Fiduciary, and Custody Activities (NAICS 523991)					
Miscellaneous Financial Investment Activities (NAICS 523999)					

Source: JobsEQ, 2018 - Dallas County Community College District

Top 25% of All Talent Scores



# Target Industry Analysis – Insurance (NAICS 524 – 525)

## SUMMARY OF INSURANCE

This industry employs over 75,000 people in the greater region, with Insurance Agencies and Brokerages (NAICS 524210) being the largest subsector of employment. Addison has a significantly higher concentration than the greater region and state in almost all subsectors of this industry.

Wages are higher in Addison than the greater region, state and national averages in all but two subsectors of this industry:

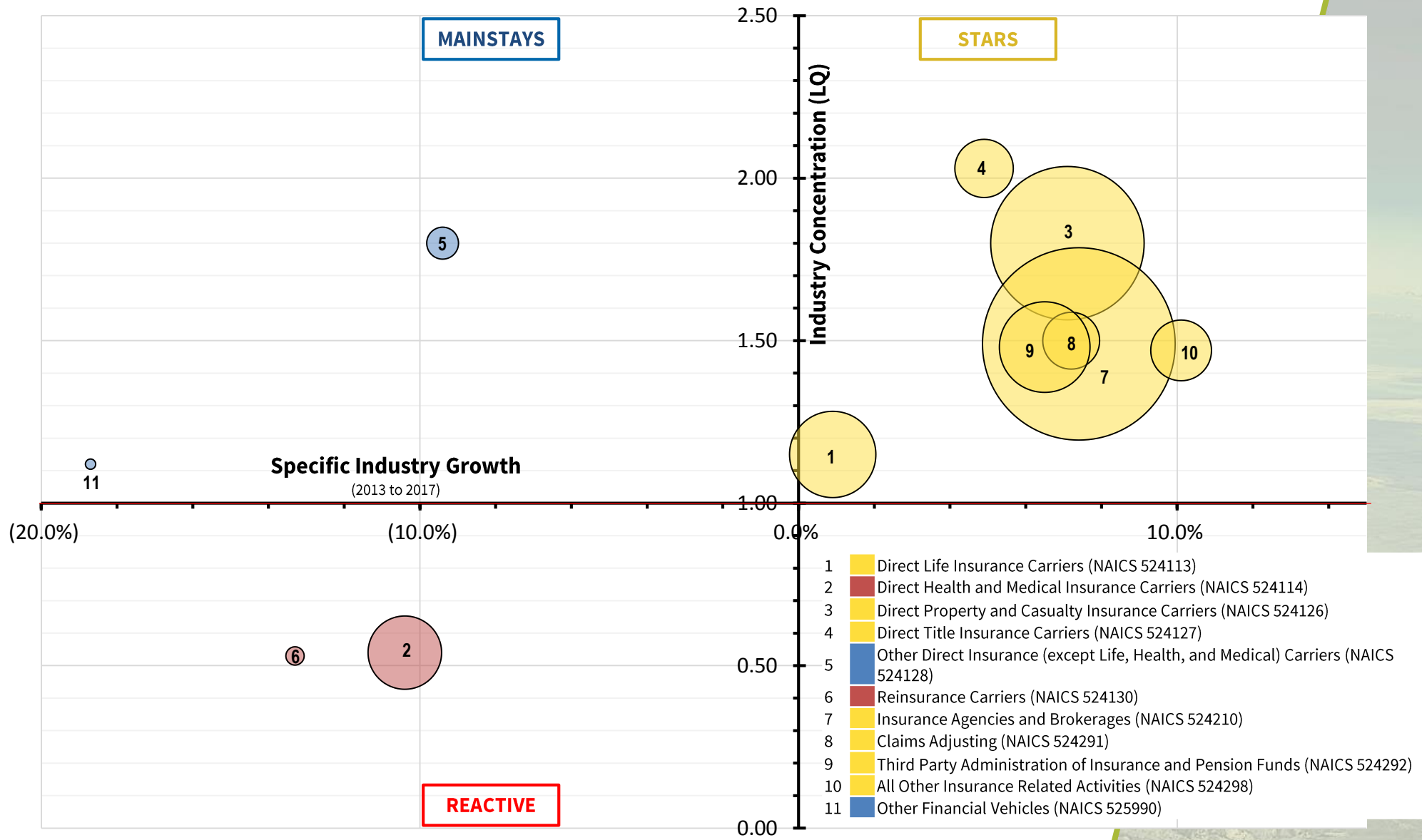
- Direct Property and Casualty Insurance Carriers (NAICS 524126)
- Other Financial Vehicles (NAICS 525990)

Almost all subsectors within this industry have experienced significant growth over the past 5-year period in Addison, and half are projected to experience significant growth over the next 10-year period as well. Three subsectors have experienced significant growth in all regions and all time periods (*entire row highlighted green*): Claims Adjusting (NAICS 524291), Third Party Administration of Insurance and Pension Funds (NAICS 524292), and All Other Insurance Related Activities (NAICS 524298).



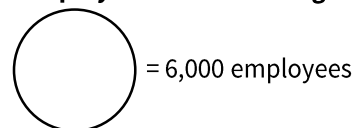
# Target Industry Analysis – Insurance (NAICS 524 – 525)

GRAPH 3.7 INSURANCE



Circle Size = Number of employees in the Greater Region  
Source: JobsEQ, 2018 - Dallas County Community College District

Total Employees in Greater Region: 75,498

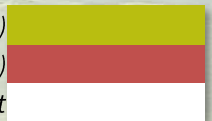


# Target Industry Analysis – Insurance (NAICS 524 – 525)

Table 3.7.A: Existing Industry Concentration Comparison	Addison Total Employment	Greater Region Total Employment	Texas Total Employment	Addison Location Quotient	Greater Region Location Quotient	Texas Location Quotient
Direct Life Insurance Carriers (NAICS 524113)	419	6,053	19,029	2.48	1.15	0.95
Direct Health and Medical Insurance Carriers (NAICS 524114)	206	4,412	13,243	0.78	0.54	0.42
Direct Property and Casualty Insurance Carriers (NAICS 524126)	933	18,862	47,910	2.76	1.8	1.2
Direct Title Insurance Carriers (NAICS 524127)	682	2,812	8,016	15.3	2.03	1.52
Other Direct Insurance (except Life, Health, and Medical) Carriers (NAICS 524128)	115	868	1,379	7.42	1.8	0.75
Reinsurance Carriers (NAICS 524130)	19	306	471	1.02	0.53	0.21
Insurance Agencies and Brokerages (NAICS 524210)	2,578	29,697	87,927	4	1.49	1.15
Claims Adjusting (NAICS 524291)	297	2,674	7,440	5.16	1.5	1.09
Third Party Administration of Insurance and Pension Funds (NAICS 524292)	528	6,670	15,321	3.64	1.48	0.89
All Other Insurance Related Activities (NAICS 524298)	164	3,040	6,855	2.47	1.47	0.87
Other Financial Vehicles (NAICS 525990)	2	104	498	0.53	1.12	1.41

Source: JobsEQ, 2018 - Dallas County Community College District

Addison LQ > than Greater Region (by  $\geq 0.5$ )  
 Addison LQ < than Greater Region (by  $\geq 0.5$ )  
 Addison LQ and Greater Region LQ are not significantly different



# Target Industry Analysis – Insurance (NAICS 524 – 525)

Table 3.7.B: Existing Industry Wage Comparison	Addison Average Cluster Wage (Annual)	Greater Region Average Cluster Wage (Annual)	Texas Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Direct Life Insurance Carriers (NAICS 524113)	\$98,860	\$83,491	\$87,121	\$105,710
Direct Health and Medical Insurance Carriers (NAICS 524114)	\$71,816	\$69,012	\$69,507	\$87,539
Direct Property and Casualty Insurance Carriers (NAICS 524126)	\$74,728	\$88,947	\$87,928	\$89,081
Direct Title Insurance Carriers (NAICS 524127)	\$125,433	\$83,831	\$89,181	\$89,848
Other Direct Insurance (except Life, Health, and Medical) Carriers (NAICS 524128)	\$138,416	\$67,963	\$112,011	\$92,211
Reinsurance Carriers (NAICS 524130)	\$148,083	\$120,369	\$127,067	\$140,896
Insurance Agencies and Brokerages (NAICS 524210)	\$86,103	\$67,681	\$69,246	\$75,062
Claims Adjusting (NAICS 524291)	\$92,175	\$71,638	\$70,199	\$70,667
Third Party Administration of Insurance and Pension Funds (NAICS 524292)	\$79,498	\$61,921	\$65,724	\$69,626
All Other Insurance Related Activities (NAICS 524298)	\$96,862	\$71,508	\$72,432	\$80,993
Other Financial Vehicles (NAICS 525990)	\$86,960	\$54,821	\$263,293	\$213,920

Source: JobsEQ, 2018 - Dallas County Community College District

Addison wages < 2 or more region wages

Addison wages > 2 or more region wages

# Target Industry Analysis – Insurance (NAICS 524 – 525)

Table 3.7.C: Existing Industry Growth Comparison	Addison 5-year Growth (2013 – 2017)	Addison 10-year Projected Growth (2017 – 2027)	Greater Region 5-year Growth (2013 - 2017)	Greater Region 10-year Projected Growth (2017 - 2027)	Texas 5-year Growth (2013-2017)	Texas 10-year Projected Growth (2017-2027)	U.S. 5-year Growth (2013 - 2017)	U.S. 10-year Projected Growth (2017 - 2027)
Direct Life Insurance Carriers (NAICS 524113)	(0.8%)	0.9%	0.9%	1.6%	1.9%	1.3%	(2.4%)	0.1%
Direct Health and Medical Insurance Carriers (NAICS 524114)	(24.0%)	2.7%	(10.4%)	3.5%	(2.7%)	3.3%	1.4%	2.1%
Direct Property and Casualty Insurance Carriers (NAICS 524126)	(6.0%)	0.3%	7.1%	0.4%	4.0%	0.6%	0.6%	(0.5%)
Direct Title Insurance Carriers (NAICS 524127)	102.4%	0.3%	4.9%	0.9%	3.4%	0.6%	2.4%	(0.5%)
Other Direct Insurance (except Life, Health, and Medical) Carriers (NAICS 524128)	29.5%	0.3%	(9.4%)	0.3%	(4.9%)	0.5%	0.2%	(0.5%)
Reinsurance Carriers (NAICS 524130)	9.7%	0.9%	(13.3%)	1.1%	(8.1%)	1.0%	0.3%	0.1%
Insurance Agencies and Brokerages (NAICS 524210)	4.7%	1.5%	7.4%	1.7%	5.1%	1.7%	3.7%	0.8%
Claims Adjusting (NAICS 524291)	12.8%	2.7%	7.2%	2.7%	6.4%	2.7%	1.4%	1.8%
Third Party Administration of Insurance and Pension Funds (NAICS 524292)	12.2%	2.8%	6.5%	2.9%	7.4%	3.0%	5.9%	2.1%
All Other Insurance Related Activities (NAICS 524298)	24.2%	2.7%	10.1%	3.0%	9.2%	2.9%	5.1%	2.0%
Other Financial Vehicles (NAICS 525990)	(37.1%)	1.7%	(18.7%)	2.3%	(11.3%)	2.2%	(13.8%)	1.0%

Source: JobsEQ, 2018 - Dallas County Community College District

Industry growth greater than or equal to one percent in the respective region and time frame.

Industry growth is less than or equal to negative one percent in the respective region and time frame.

# Target Industry Analysis – Insurance (NAICS 524 – 525)

Rank	Table 3.7.D Ranked by Number of Jobs, 5-Year Growth and Cluster Concentration	Regional Number of Jobs (2017)	Regional 5-year Growth	Regional Cluster Concentration (LQ)
1	Insurance Agencies and Brokerages (NAICS 524210)	29,697 (1)	7.4% (2)	1.49
2	Direct Property and Casualty Insurance Carriers (NAICS 524126)	18,862 (2)	7.1%	1.8 (2)*
3	Third Party Administration of Insurance and Pension Funds (NAICS 524292)	6,670 (3)	6.5%	1.48
4	Direct Life Insurance Carriers (NAICS 524113)	6,053	0.9%	1.15
5	Direct Health and Medical Insurance Carriers (NAICS 524114)	4,412	(10.4%)	0.54
6	All Other Insurance Related Activities (NAICS 524298)	3,040	10.1% (1)	1.47
7	Direct Title Insurance Carriers (NAICS 524127)	2,812	4.9%	2.03 (1)
8	Claims Adjusting (NAICS 524291)	2,674	7.2% (3)	1.5
9	Other Direct Insurance (except Life, Health, and Medical) Carriers (NAICS 524128)	868	(9.4%)	1.8 (2)*
10	Reinsurance Carriers (NAICS 524130)	306	(13.3%)	0.53
11	Other Financial Vehicles (NAICS 525990)	104	(18.7%)	1.12

Source: JobsEQ, 2018 - Dallas County Community College District

Top three (3) in each (# Jobs, Growth, LQ)

# Target Industry Analysis – Insurance (NAICS 524 – 525)

Table 3.7.E: Existing Industry Talent Comparison	Addison Average Concentration	Greater Region Average Concentration	Addison Average Projected Growth	Greater Region Projected Growth	Addison Talent Score
Direct Life Insurance Carriers (NAICS 524113) Reinsurance Carriers (NAICS 524130)	3.35	1.47	1.18%	1.38%	92
Direct Health and Medical Insurance Carriers (NAICS 524114)	2.81	1.38	1.60%	1.76%	60
Direct Property and Casualty Insurance Carriers (NAICS 524126) Direct Title Insurance Carriers (NAICS 524127) Other Direct Insurance (except Life, Health, and Medical) Carriers (NAICS 524128)	3.35	1.47	1.18%	1.38%	98
Insurance Agencies and Brokerages (NAICS 524210)	2.63	1.39	1.08%	1.34%	113
Claims Adjusting (NAICS 524291) Third Party Administration of Insurance and Pension Funds (NAICS 524292) All Other Insurance Related Activities (NAICS 524298)	2.65	1.44	1.08%	1.30%	107
Other Financial Vehicles (NAICS 525990)	2.09	1.27	1.48%	1.44%	94

Source: JobsEQ, 2018 - Dallas County Community College District

Top 25% of All Talent Scores



# Target Industry Analysis – Professional, Scientific, and Technical Services

# Target Industry Analysis – Legal, Accounting, Engineering and Design Services (NAICS 5411 - 5414)

## SUMMARY OF LEGAL, ACCOUNTING, ENGINEERING AND DESIGN SERVICES

This industry employs over 98,000 people in the greater region, with Offices of Lawyers (NAICS 541110) being the largest subsector of employment. Addison has a significantly higher concentration than the greater region in about half of the subsectors of this industry.

Wages in Addison are higher compared to the greater region, state and national averages in all but three subsectors:

- Testing Laboratories (NAICS 541380)
- Industrial Design Services (NAICS 541420)
- Other Specialized Design Services (NAICS 541490)

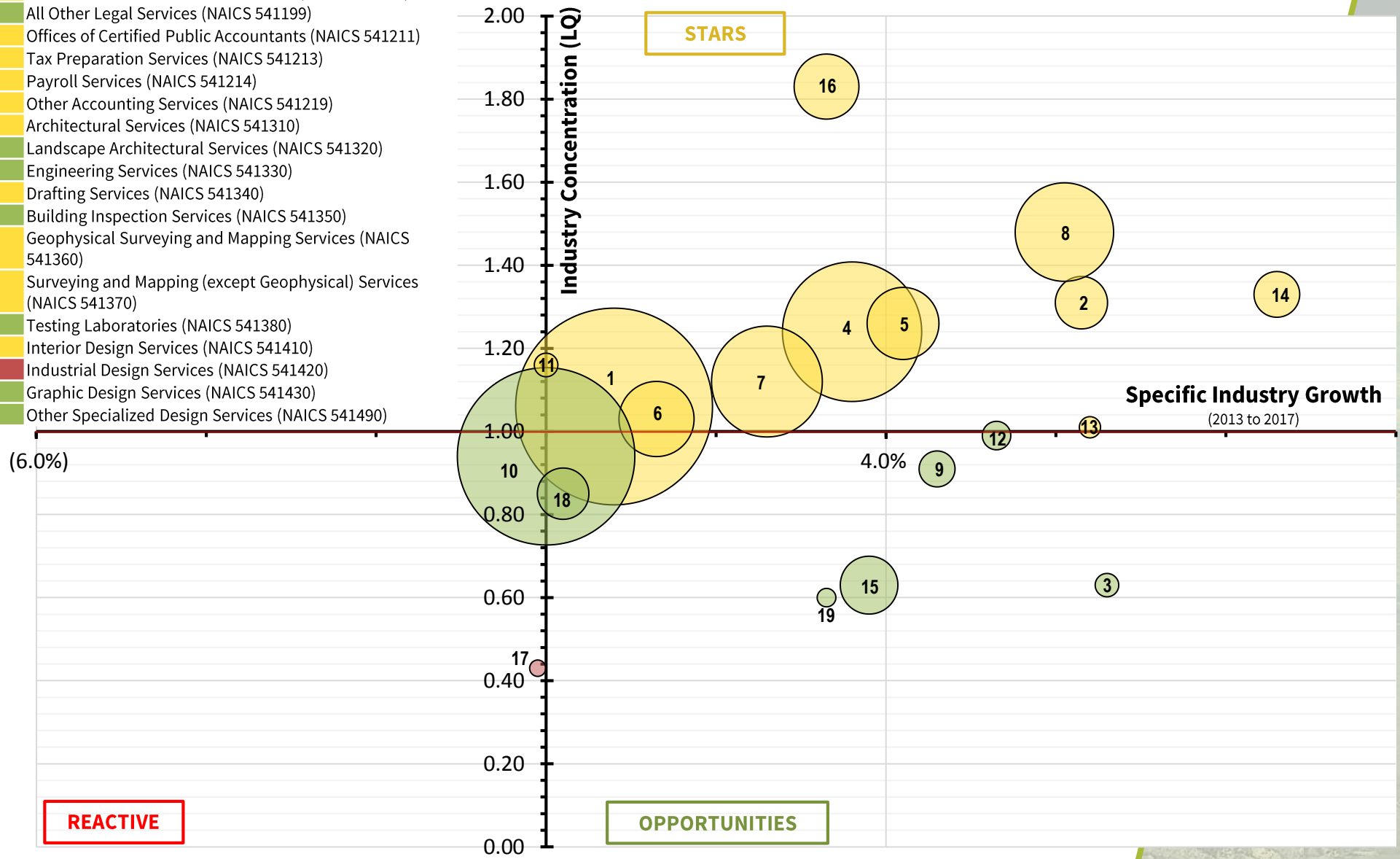
Half of subsectors within this industry have experienced significant growth over the past 5-year period in Addison, and nearly all are projected to experience significant growth over the next 10-year period as well. Six subsectors have experienced significant growth in all but one region or time period (*seven columns highlighted green*):

- Offices of Certified Public Accountants (NAICS 541211)
- Other Accounting Services (NAICS 541219)
- Architectural Services (NAICS 541310)
- Landscape Architectural Services (NAICS 541320)
- Surveying and Mapping (except Geophysical) Services (NAICS 541370)
- Interior Design Services (NAICS 541410)

# Target Industry Analysis – Legal, Accounting, Engineering and Design Services (NAICS 5411 - 5414)

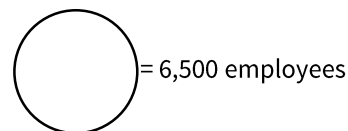
- 1 Offices of Lawyers (NAICS 541110)
- 2 Title Abstract and Settlement Offices (NAICS 541191)
- 3 All Other Legal Services (NAICS 541199)
- 4 Offices of Certified Public Accountants (NAICS 541211)
- 5 Tax Preparation Services (NAICS 541213)
- 6 Payroll Services (NAICS 541214)
- 7 Other Accounting Services (NAICS 541219)
- 8 Architectural Services (NAICS 541310)
- 9 Landscape Architectural Services (NAICS 541320)
- 10 Engineering Services (NAICS 541330)
- 11 Drafting Services (NAICS 541340)
- 12 Building Inspection Services (NAICS 541350)
- 13 Geophysical Surveying and Mapping Services (NAICS 541360)
- 14 Surveying and Mapping (except Geophysical) Services (NAICS 541370)
- 15 Testing Laboratories (NAICS 541380)
- 16 Interior Design Services (NAICS 541410)
- 17 Industrial Design Services (NAICS 541420)
- 18 Graphic Design Services (NAICS 541430)
- 19 Other Specialized Design Services (NAICS 541490)

**GRAPH 3.8 LEGAL, ACCOUNTING, ENGINEERING AND DESIGN SERVICES**



**Circle Size = Number of employees in the Greater Region**  
 Source: JobsEQ, 2018 - Dallas County Community College District

**Total Employees in Greater Region: 98,177**



# Target Industry Analysis – Legal, Accounting, Engineering and Design Services (NAICS 5411 - 5414)

Table 3.8.A: Existing Industry Concentration Comparison	Addison Total Employment	Greater Region Total Employment	Texas Total Employment	Addison Location Quotient	Greater Region Location Quotient	Texas Location Quotient
Offices of Lawyers (NAICS 541110)	1,593	26,525	84,348	1.98	1.06	0.88
Title Abstract and Settlement Offices (NAICS 541191)	78	1,955	7,304	1.63	1.31	1.28
All Other Legal Services (NAICS 541199)	11	419	2,840	0.51	0.63	1.12
Offices of Certified Public Accountants (NAICS 541211)	685	13,382	36,576	1.97	1.24	0.89
Tax Preparation Services (NAICS 541213)	176	3,632	12,751	1.91	1.26	1.16
Payroll Services (NAICS 541214)	116	3,953	16,189	0.94	1.03	1.11
Other Accounting Services (NAICS 541219)	207	8,500	31,424	0.85	1.12	1.09
Architectural Services (NAICS 541310)	443	6,734	16,082	3.03	1.48	0.93
Landscape Architectural Services (NAICS 541320)	76	942	3,717	2.27	0.91	0.94
Engineering Services (NAICS 541330)	895	21,585	101,362	1.21	0.94	1.16
Drafting Services (NAICS 541340)	17	419	1,596	1.47	1.16	1.16
Building Inspection Services (NAICS 541350)	22	599	2,405	1.12	0.99	1.04
Geophysical Surveying and Mapping Services (NAICS 541360)	6	351	5,234	0.5	1.01	3.94
Surveying and Mapping (except Geophysical) Services (NAICS 541370)	72	1,491	7,870	1.98	1.33	1.84
Testing Laboratories (NAICS 541380)	458	2,357	17,198	3.83	0.63	1.21
Interior Design Services (NAICS 541410)	91	2,977	6,950	1.74	1.83	1.12
Industrial Design Services (NAICS 541420)	10	209	841	0.62	0.43	0.45
Graphic Design Services (NAICS 541430)	178	1,879	5,941	2.5	0.85	0.7
Other Specialized Design Services (NAICS 541490)	17	268	889	1.21	0.6	0.52

Source: JobsEQ, 2018 - Dallas County Community College District

Addison LQ > than Greater Region (by  $\geq 0.5$ )

Addison LQ < than Greater Region (by  $\geq 0.5$ )

Addison LQ and Greater Region LQ are not significantly different

# Target Industry Analysis – Legal, Accounting, Engineering and Design Services (NAICS 5411 - 5414)

Table 3.8.B: Existing Industry Wage Comparison	Addison Average Cluster Wage (Annual)	Greater Region Average Cluster Wage (Annual)	Texas Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Offices of Lawyers (NAICS 541110)	\$121,518	\$112,593	\$98,776	\$97,447
Title Abstract and Settlement Offices (NAICS 541191)	\$77,737	\$73,019	\$64,257	\$62,352
All Other Legal Services (NAICS 541199)	\$77,911	\$74,191	\$136,695	\$73,527
Offices of Certified Public Accountants (NAICS 541211)	\$96,379	\$90,989	\$85,011	\$86,944
Tax Preparation Services (NAICS 541213)	\$86,539	\$68,472	\$40,243	\$34,520
Payroll Services (NAICS 541214)	\$79,598	\$78,479	\$67,198	\$81,081
Other Accounting Services (NAICS 541219)	\$59,829	\$59,653	\$53,494	\$52,888
Architectural Services (NAICS 541310)	\$106,919	\$101,554	\$90,750	\$83,900
Landscape Architectural Services (NAICS 541320)	\$64,580	\$65,253	\$58,765	\$56,621
Engineering Services (NAICS 541330)	\$101,148	\$99,163	\$107,722	\$94,477
Drafting Services (NAICS 541340)	\$65,324	\$61,048	\$53,124	\$49,932
Building Inspection Services (NAICS 541350)	\$62,899	\$61,160	\$57,017	\$54,431
Geophysical Surveying and Mapping Services (NAICS 541360)	\$97,955	\$66,610	\$102,342	\$81,388
Surveying and Mapping (except Geophysical) Services (NAICS 541370)	\$65,999	\$67,174	\$61,095	\$57,305
Testing Laboratories (NAICS 541380)	\$72,348	\$70,326	\$75,254	\$77,651
Interior Design Services (NAICS 541410)	\$74,294	\$69,212	\$59,514	\$58,422
Industrial Design Services (NAICS 541420)	\$88,349	\$111,571	\$89,815	\$87,121
Graphic Design Services (NAICS 541430)	\$67,691	\$63,989	\$59,887	\$61,798
Other Specialized Design Services (NAICS 541490)	\$65,391	\$66,030	\$57,482	\$69,507

Source: JobsEQ, 2018 - Dallas County Community College District

Addison wages < 2 or more region wages  
Addison wages > 2 or more region wages

# Target Industry Analysis – Legal, Accounting, Engineering and Design Services (NAICS 5411 - 5414)

Table 3.8.C: Existing Industry Growth Comparison	Addison 5-year Growth (2013 – 2017)	Addison 10-year Projected Growth (2017 – 2027)	Greater Region 5-year Growth (2013 - 2017)	Greater Region 10-year Projected Growth (2017 - 2027)	Texas 5-year Growth (2013-2017)	Texas 10-year Projected Growth (2017-2027)	U.S. 5-year Growth (2013 - 2017)	U.S. 10-year Projected Growth (2017 - 2027)
Offices of Lawyers (NAICS 541110)	(1.4%)	0.9%	0.8%	1.1%	0.7%	1.1%	(0.1%)	0.2%
Title Abstract and Settlement Offices (NAICS 541191)	1.5%	0.9%	6.3%	1.4%	5.9%	1.2%	3.1%	0.2%
All Other Legal Services (NAICS 541199)	(16.5%)	1.0%	6.6%	1.2%	9.2%	1.1%	4.5%	0.2%
Offices of Certified Public Accountants (NAICS 541211)	9.1%	1.4%	3.6%	1.6%	3.0%	1.5%	2.8%	0.7%
Tax Preparation Services (NAICS 541213)	16.4%	1.4%	4.2%	1.7%	2.4%	1.6%	(0.5%)	0.7%
Payroll Services (NAICS 541214)	(16.0%)	1.4%	1.3%	1.7%	4.4%	2.2%	0.4%	0.7%
Other Accounting Services (NAICS 541219)	2.3%	1.4%	2.6%	1.8%	3.6%	1.7%	1.2%	0.7%
Architectural Services (NAICS 541310)	5.7%	1.5%	6.1%	1.6%	4.9%	1.7%	3.4%	0.8%
Landscape Architectural Services (NAICS 541320)	56.7%	1.5%	4.6%	1.8%	2.0%	1.9%	1.4%	0.8%
Engineering Services (NAICS 541330)	4.6%	1.9%	0.0%	2.1%	(0.7%)	2.1%	1.1%	1.2%
Drafting Services (NAICS 541340)	(10.0%)	1.5%	0.0%	1.9%	1.4%	1.8%	1.6%	0.8%
Building Inspection Services (NAICS 541350)	(3.1%)	1.5%	5.3%	2.0%	2.2%	1.9%	3.2%	0.8%
Geophysical Surveying and Mapping Services (NAICS 541360)	(5.6%)	1.5%	6.4%	2.3%	(8.6%)	1.8%	(3.6%)	0.8%
Surveying and Mapping (except Geophysical) Services (NAICS 541370)	15.3%	1.5%	8.6%	1.8%	1.7%	1.7%	2.6%	0.8%
Testing Laboratories (NAICS 541380)	(1.6%)	0.6%	3.8%	1.0%	2.6%	0.8%	0.9%	(0.1%)
Interior Design Services (NAICS 541410)	1.6%	1.3%	3.3%	1.5%	4.0%	1.6%	3.8%	0.7%
Industrial Design Services (NAICS 541420)	(10.1%)	1.3%	(0.1%)	2.0%	(1.9%)	1.8%	6.9%	0.6%
Graphic Design Services (NAICS 541430)	17.5%	1.3%	0.2%	1.7%	0.8%	1.7%	0.1%	0.6%
Other Specialized Design Services (NAICS 541490)	0.8%	1.3%	3.3%	1.7%	5.8%	1.7%	2.8%	0.6%

Source: JobsEQ, 2018 - Dallas County Community College District

Industry growth greater than or equal to one percent in the respective region and time frame.

Industry growth is less than or equal to negative one percent in the respective region and time frame.



# Target Industry Analysis – Legal, Accounting, Engineering and Design Services (NAICS 5411 - 5414)

Rank	Table 3.8.D Ranked by Number of Jobs, 5-Year Growth and Cluster Concentration	Regional Number of Jobs (2017)	Regional 5-year Growth	Regional Cluster Concentration (LQ)
1	Offices of Lawyers (NAICS 541110)	26,525 (1)	0.8%	1.06 (9)
2	Engineering Services (NAICS 541330)	21,585 (2)	0.0%	0.94
3	Offices of Certified Public Accountants (NAICS 541211)	13,382 (3)	3.6%	1.24 (6)
4	Other Accounting Services (NAICS 541219)	8,500 (4)	2.6%	1.12 (8)
5	Architectural Services (NAICS 541310)	6,734 (5)	6.1% (5)	1.48 (2)
6	Payroll Services (NAICS 541214)	3,953 (6)	1.3%	1.03
7	Tax Preparation Services (NAICS 541213)	3,632 (7)	4.2% (8)	1.26 (5)
8	Interior Design Services (NAICS 541410)	2,977 (8)	3.3%	1.83 (1)
9	Testing Laboratories (NAICS 541380)	2,357 (9)	3.8% (9)	0.63
10	Title Abstract and Settlement Offices (NAICS 541191)	1,955	6.3% (4)	1.31 (4)
11	Graphic Design Services (NAICS 541430)	1,879	0.2%	0.85
12	Surveying and Mapping (except Geophysical) Services (NAICS 541370)	1,491	8.6% (1)	1.33 (3)
13	Landscape Architectural Services (NAICS 541320)	942	4.6% (7)	0.91
14	Building Inspection Services (NAICS 541350)	599	5.3% (6)	0.99
15	All Other Legal Services (NAICS 541199)	419	6.6% (2)	0.63
16	Drafting Services (NAICS 541340)	419	0.0%	1.16 (7)
17	Geophysical Surveying and Mapping Services (NAICS 541360)	351	6.4% (3)	1.01
18	Other Specialized Design Services (NAICS 541490)	268	3.3%	0.6
19	Industrial Design Services (NAICS 541420)	209	(0.1%)	0.43

Source: JobsEQ, 2018 - Dallas County Community College District

Top nine (9) in each (# Jobs, Growth, LQ)

# Target Industry Analysis – Legal, Accounting, Engineering and Design Services (NAICS 5411 - 5414)

Table 3.8.E: Existing Industry Talent Comparison	Addison Average Concentration	Greater Region Average Concentration	Addison Average Projected Growth	Greater Region Average Projected Growth	Addison Talent Score
Offices of Lawyers (NAICS 541110) Title Abstract and Settlement Offices (NAICS 541191) All Other Legal Services (NAICS 541199)	1.59	1.04	0.70%	0.86%	168
Offices of Certified Public Accountants (NAICS 541211) Tax Preparation Services (NAICS 541213) Payroll Services (NAICS 541214) Other Accounting Services (NAICS 541219)	1.41	1.12	1.02%	1.20%	158
Architectural Services (NAICS 541310) Landscape Architectural Services (NAICS 541320) Drafting Services (NAICS 541340) Building Inspection Services (NAICS 541350) Geophysical Surveying and Mapping Services (NAICS 541360) Surveying and Mapping (except Geophysical) Services (NAICS 541370)	1.44	1.03	1.60%	1.74%	105
Engineering Services (NAICS 541330)	1.24	1.00	1.66%	1.76%	104
Testing Laboratories (NAICS 541380)	1.13	0.87	1.18%	1.24%	182
Interior Design Services (NAICS 541410) Industrial Design Services (NAICS 541420) Graphic Design Services (NAICS 541430) Other Specialized Design Services (NAICS 541490)	1.50	1.07	1.22%	1.46%	133

Source: JobsEQ, 2018 - Dallas County Community College District

Top 25% of All Talent Scores

# Target Industry Analysis – Computer, Scientific and Research Services (NAICS 5415 - 5417)

## SUMMARY OF COMPUTER, SCIENTIFIC AND RESEARCH SERVICES

This industry employs over 127,000 people in the greater region, with Computer Systems Design Services (NAICS 541512) being the largest subsector of employment. Addison has a significantly higher concentration than the greater region in the following subsectors of this industry:

- Custom Computer Programming Services (NAICS 541511)
- Computer Systems Design Services (NAICS 541512)
- Administrative Management and General Management Consulting Services (NAICS 541611)
- Research and Development in the Social Sciences and Humanities (NAICS 541720)

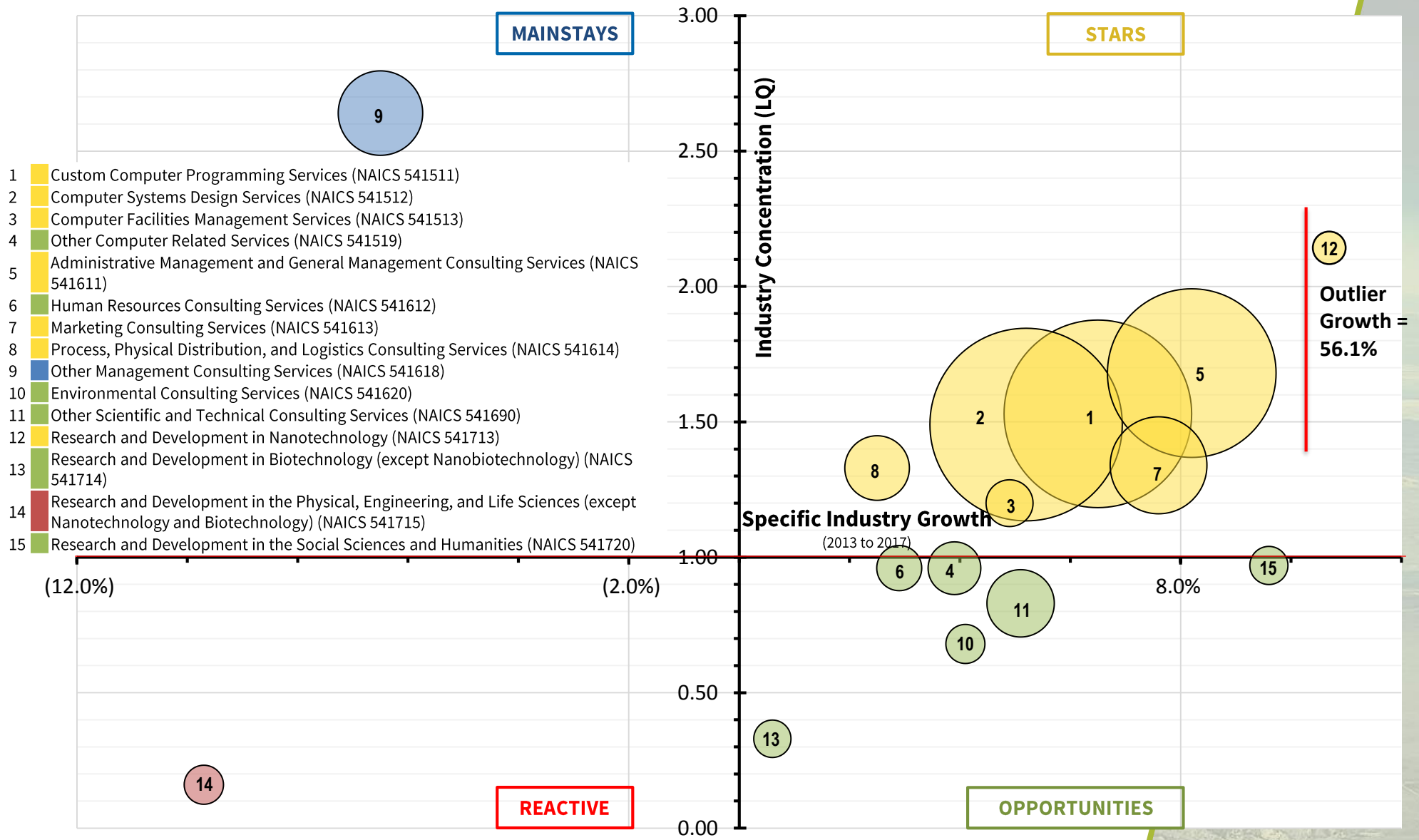
Wages in Addison are generally higher compared to the greater region, state and national averages, with all but four of the subsectors in this industry having higher wages than at least two of the comparison regions.

Almost half of subsectors within this industry have experienced significant growth over the past 5-year period in Addison, and all but one are projected to experience significant growth over the next 10-year period as well. Seven subsectors have experienced significant growth in all regions and all time periods (*entire row highlighted green*):

- Custom Computer Programming Services (NAICS 541511)
- Computer Systems Design Services (NAICS 541512)
- Computer Facilities Management Services (NAICS 541513)
- Administrative Management and General Management Consulting Services (NAICS 541611)
- Marketing Consulting Services (NAICS 541613)
- Process, Physical Distribution, and Logistics Consulting Services (NAICS 541614)
- Research and Development in Nanotechnology (NAICS 541713)

# Target Industry Analysis – Computer, Scientific and Research Services (NAICS 5415 - 5417)

**GRAPH 3.9 COMPUTER, SCIENTIFIC AND RESEARCH SERVICES**



Circle Size = Number of employees in the Greater Region  
Source: JobsEQ, 2018 - Dallas County Community College District

Total Employees in Greater Region: 127,548

# Target Industry Analysis – Computer, Scientific and Research Services (NAICS 5415 - 5417)

Table 3.9.A: Existing Industry Concentration Comparison	Addison Total Employment	Greater Region Total Employment	Texas Total Employment	Addison Location Quotient	Greater Region Location Quotient	Texas Location Quotient
Custom Computer Programming Services (NAICS 541511)	2,480	31,748	83,234	3.72	1.53	1.05
Computer Systems Design Services (NAICS 541512)	2,250	33,467	87,695	3.11	1.49	1.02
Computer Facilities Management Services (NAICS 541513)	27	2,067	4,167	0.48	1.2	0.64
Other Computer Related Services (NAICS 541519)	112	2,604	6,160	1.28	0.96	0.6
Administrative Management and General Management Consulting Services (NAICS 541611)	1,986	25,724	69,451	4.03	1.68	1.19
Human Resources Consulting Services (NAICS 541612)	71	1,922	7,104	1.1	0.96	0.93
Marketing Consulting Services (NAICS 541613)	159	8,602	24,643	0.77	1.34	1.01
Process, Physical Distribution, and Logistics Consulting Services (NAICS 541614)	46	3,871	11,636	0.49	1.33	1.05
Other Management Consulting Services (NAICS 541618)	98	6,548	18,324	1.23	2.64	1.94
Environmental Consulting Services (NAICS 541620)	47	1,463	7,097	0.68	0.68	0.87
Other Scientific and Technical Consulting Services (NAICS 541690)	151	4,192	18,000	0.93	0.83	0.93
Research and Development in Nanotechnology (NAICS 541713)	39	1,174	2,125	2.23	2.14	1.02
Research and Development in Biotechnology (except Nanobiotechnology) (NAICS 541714)	6	1,327	5,514	0.05	0.33	0.36
Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology) (NAICS 541715)	25	1,460	14,309	0.08	0.16	0.41
Research and Development in the Social Sciences and Humanities (NAICS 541720)	259	1,379	3,375	5.63	0.97	0.62

Source: JobsEQ, 2018 - Dallas County Community College District

Addison LQ > than Greater Region (by  $\geq 0.5$ )  
 Addison LQ < than Greater Region (by  $\geq 0.5$ )  
 Addison LQ and Greater Region LQ are not significantly different

# Target Industry Analysis – Computer, Scientific and Research Services (NAICS 5415 - 5417)

Table 3.9.B: Existing Industry Wage Comparison	Addison Average Cluster Wage (Annual)	Greater Region Average Cluster Wage (Annual)	Texas Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Custom Computer Programming Services (NAICS 541511)	\$107,686	\$107,128	\$109,638	\$114,702
Computer Systems Design Services (NAICS 541512)	\$104,219	\$100,925	\$101,548	\$108,232
Computer Facilities Management Services (NAICS 541513)	\$112,985	\$112,112	\$95,489	\$95,161
Other Computer Related Services (NAICS 541519)	\$161,858	\$147,475	\$118,955	\$111,950
Administrative Management and General Management Consulting Services (NAICS 541611)	\$126,533	\$114,267	\$101,981	\$102,825
Human Resources Consulting Services (NAICS 541612)	\$151,330	\$122,358	\$79,873	\$89,863
Marketing Consulting Services (NAICS 541613)	\$81,061	\$85,928	\$78,532	\$79,727
Process, Physical Distribution, and Logistics Consulting Services (NAICS 541614)	\$71,603	\$65,157	\$70,845	\$72,827
Other Management Consulting Services (NAICS 541618)	\$121,675	\$105,237	\$92,858	\$90,850
Environmental Consulting Services (NAICS 541620)	\$86,552	\$79,878	\$75,480	\$75,772
Other Scientific and Technical Consulting Services (NAICS 541690)	\$127,603	\$113,603	\$104,062	\$87,722
Research and Development in Nanotechnology (NAICS 541713)	\$99,009	\$99,350	\$120,792	\$114,144
Research and Development in Biotechnology (except Nanobiotechnology) (NAICS 541714)	\$93,837	\$103,237	\$116,875	\$157,447
Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology) (NAICS 541715)	\$94,995	\$113,779	\$108,159	\$119,007
Research and Development in the Social Sciences and Humanities (NAICS 541720)	\$71,576	\$70,424	\$65,249	\$73,486

Source: JobsEQ, 2018 - Dallas County Community College District

Addison wages < 2 or more region wages

Addison wages > 2 or more region wages



# Target Industry Analysis – Computer, Scientific and Research Services (NAICS 5415 - 5417)

Table 3.9.C: Existing Industry Growth Comparison	Addison 5-year Growth (2013 - 2017)	Addison 10-year Projected Growth (2017 - 2027)	Greater Region 5-year Growth (2013 - 2017)	Greater Region 10-year Projected Growth (2017 - 2027)	Texas 5-year Growth (2013-2017)	Texas 10-year Projected Growth (2017-2027)	U.S. 5-year Growth (2013 - 2017)	U.S. 10-year Projected Growth (2017 - 2027)
Custom Computer Programming Services (NAICS 541511)	12.1%	2.6%	6.5%	3.0%	7.1%	3.1%	4.5%	1.9%
Computer Systems Design Services (NAICS 541512)	3.2%	2.6%	5.2%	2.9%	7.1%	3.1%	4.9%	1.9%
Computer Facilities Management Services (NAICS 541513)	1.1%	2.5%	4.9%	2.7%	4.8%	2.7%	5.3%	1.9%
Other Computer Related Services (NAICS 541519)	4.6%	2.5%	3.9%	2.8%	0.5%	2.9%	0.9%	1.9%
Administrative Management and General Management Consulting Services (NAICS 541611)	12.0%	2.7%	8.2%	2.8%	8.5%	2.9%	5.7%	1.9%
Human Resources Consulting Services (NAICS 541612)	(0.2%)	2.6%	2.9%	3.0%	2.9%	3.0%	0.5%	2.0%
Marketing Consulting Services (NAICS 541613)	7.9%	2.4%	7.6%	2.9%	6.8%	3.0%	5.5%	1.8%
Process, Physical Distribution, and Logistics Consulting Services (NAICS 541614)	30.6%	2.6%	2.5%	3.1%	5.3%	2.9%	3.9%	2.0%
Other Management Consulting Services (NAICS 541618)	(4.0%)	2.6%	(6.5%)	3.0%	(0.4%)	3.1%	1.7%	1.9%
Environmental Consulting Services (NAICS 541620)	(14.7%)	2.5%	4.1%	2.8%	0.9%	2.9%	0.6%	1.9%
Other Scientific and Technical Consulting Services (NAICS 541690)	(7.8%)	2.5%	5.1%	2.8%	4.0%	2.8%	0.4%	1.9%
Research and Development in Nanotechnology (NAICS 541713)	65.8%	2.2%	56.1%	2.2%	22.6%	2.4%	2.8%	1.5%
Research and Development in Biotechnology (except Nanobiotechnology) (NAICS 541714)	(0.4%)	2.1%	0.6%	2.4%	3.9%	2.6%	5.3%	1.5%
Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology) (NAICS 541715)	(18.1%)	2.1%	(9.7%)	2.5%	(2.2%)	2.5%	(1.2%)	1.5%
Research and Development in the Social Sciences and Humanities (NAICS 541720)	9.8%	(2.0%)	9.6%	(1.9%)	5.9%	(1.5%)	1.1%	(2.9%)

Source: JobsEQ, 2018 - Dallas County Community College District

Industry growth greater than or equal to one percent in the respective region and time frame.

Industry growth is less than or equal to negative one percent in the respective region and time frame.

# Target Industry Analysis – Computer, Scientific and Research Services (NAICS 5415 - 5417)

Rank	Table 3.9.D Ranked by Number of Jobs, 5-Year Growth and Cluster Concentration	Regional Number of Jobs (2017)	Regional 5-year Growth	Regional Cluster Concentration (LQ)
1	Computer Systems Design Services (NAICS 541512)	33,467 (1)	5.2% (6)	1.49 (5)
2	Custom Computer Programming Services (NAICS 541511)	31,748 (2)	6.5% (5)	1.53 (4)
3	Administrative Management and General Management Consulting Services (NAICS 541611)	25,724 (3)	8.2% (3)	1.68 (3)
4	Marketing Consulting Services (NAICS 541613)	8,602 (4)	7.6% (4)	1.34 (6)
5	Other Management Consulting Services (NAICS 541618)	6,548 (5)	(6.5%)	2.64 (1)
6	Other Scientific and Technical Consulting Services (NAICS 541690)	4,192 (6)	5.1% (7)	0.83
7	Process, Physical Distribution, and Logistics Consulting Services (NAICS 541614)	3,871 (7)	2.5%	1.33 (7)
8	Other Computer Related Services (NAICS 541519)	2,604	3.9%	0.96
9	Computer Facilities Management Services (NAICS 541513)	2,067	4.9%	1.2
10	Human Resources Consulting Services (NAICS 541612)	1,922	2.9%	0.96
11	Environmental Consulting Services (NAICS 541620)	1,463	4.1%	0.68
12	Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology) (NAICS 541715)	1,460	(9.7%)	0.16
13	Research and Development in the Social Sciences and Humanities (NAICS 541720)	1,379	9.6% (2)	0.97
14	Research and Development in Biotechnology (except Nanobiotechnology) (NAICS 541714)	1,327	0.6%	0.33
15	Research and Development in Nanotechnology (NAICS 541713)	1,174	56.1% (1)	2.14 (2)

Source: JobsEQ, 2018 - Dallas County Community College District

Top seven (7) in each (# Jobs, Growth, LQ)

# Target Industry Analysis – Computer, Scientific and Research Services (NAICS 5415 - 5417)

Table 3.9.E: Existing Industry Talent Comparison	Addison Average Concentration	Greater Region Average Concentration	Addison Average Projected Growth	Greater Region Average Projected Growth	Addison Talent Score
Custom Computer Programming Services (NAICS 541511) Computer Systems Design Services (NAICS 541512) Computer Facilities Management Services (NAICS 541513) Other Computer Related Services (NAICS 541519)	2.39	1.35	1.78%	2.00%	43
Administrative Management and General Management Consulting Services (NAICS 541611) Human Resources Consulting Services (NAICS 541612) Marketing Consulting Services (NAICS 541613) Process, Physical Distribution, and Logistics Consulting Services (NAICS 541614) Other Management Consulting Services (NAICS 541618) Environmental Consulting Services (NAICS 541620) Other Scientific and Technical Consulting Services (NAICS 541690)	1.60	1.13	1.86%	2.12%	63
Research and Development in Nanotechnology (NAICS 541713) Research and Development in Biotechnology (except Nanobiotechnology) (NAICS 541714) Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology) (NAICS 541715)	0.40	0.40	1.60%	1.86%	151
Research and Development in the Social Sciences and Humanities (NAICS 541720)	1.37	0.81	0.32%	1.30%	194

Source: JobsEQ, 2018 - Dallas County Community College District

Top 25% of All Talent Scores

# Target Industry Analysis – Advertising and Other Professional, Scientific, and Technical Services (NAICS 5418 - 5419)

## SUMMARY OF ADVERTISING AND OTHER PROFESSIONAL, SCIENTIFIC AND TECHNICAL SERVICES

This industry employs over 34,000 people in the greater region, with All Other Professional, Scientific, and Technical Services (NAICS 541990) being the largest subsector of employment. Addison has a significantly higher concentration than the greater region in the following subsectors of this industry:

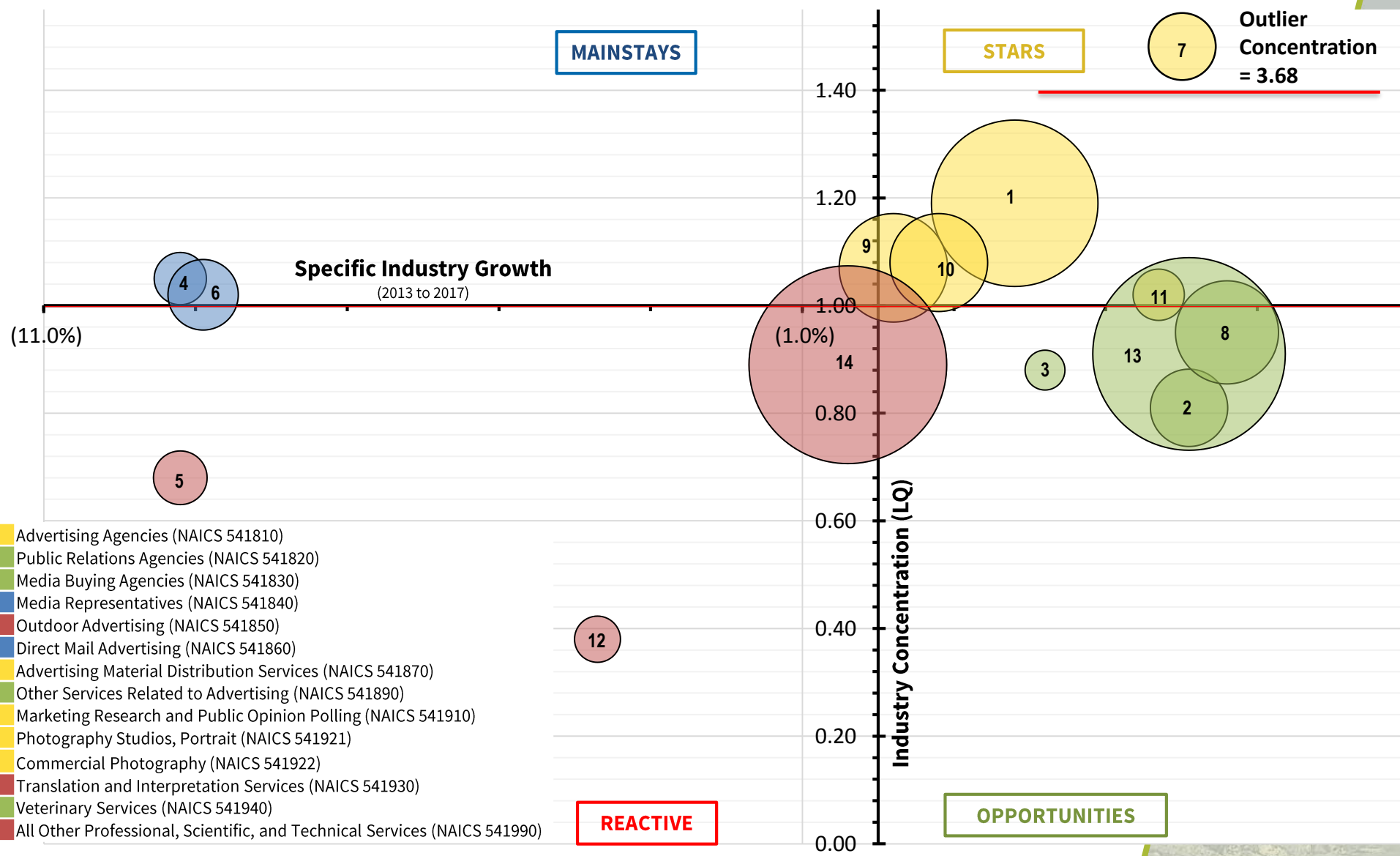
- Public Relations Agencies (NAICS 541820)
- Media Representatives (NAICS 541840)
- Direct Mail Advertising (NAICS 541860)
- Advertising Material Distribution Services (NAICS 541870)
- Marketing Research and Public Opinion Polling (NAICS 541910)
- Photography Studios, Portrait (NAICS 541921)
- Translation and Interpretation Services (NAICS 541930)

Wages in Addison are generally higher when compared to the greater region, state and national averages, with only one of the subsectors in this industry having lower wages than at least two of the comparison regions.

Half of subsectors within this industry have experienced significant growth over the past 5-year period in the greater region, and nearly all are projected to experience significant growth over the next 10-year period as well. Two subsectors have experienced significant growth in all but one region and time period (*seven columns highlighted green*): Public Relations Agencies (NAICS 541820) and Veterinary Services (NAICS 541940).

# Target Industry Analysis – Advertising and Other Professional, Scientific, and Technical Services (NAICS 5418 - 5419)

**GRAPH 3.10 ADVERTISING AND OTHER PROFESSIONAL, SCIENTIFIC, AND TECHNICAL SERVICES**



# Target Industry Analysis – Advertising and Other Professional Scientific, and Technical Services (NAICS 5418 - 5419)

Table 3.10.A: Existing Industry Concentration Comparison	Addison Total Employment	Greater Region Total Employment	Texas Total Employment	Addison Location Quotient	Greater Region Location Quotient	Texas Location Quotient
Advertising Agencies (NAICS 541810)	231	5,740	12,514	1.49	1.19	0.68
Public Relations Agencies (NAICS 541820)	81	1,265	3,449	1.62	0.81	0.58
Media Buying Agencies (NAICS 541830)	1	346	721	0.06	0.88	0.48
Media Representatives (NAICS 541840)	96	585	1,256	5.33	1.05	0.59
Outdoor Advertising (NAICS 541850)	15	616	2,424	0.52	0.68	0.71
Direct Mail Advertising (NAICS 541860)	104	1,051	2,327	3.11	1.02	0.59
Advertising Material Distribution Services (NAICS 541870)	38	978	1,257	4.43	3.68	1.24
Other Services Related to Advertising (NAICS 541890)	85	2,222	6,495	1.13	0.95	0.73
Marketing Research and Public Opinion Polling (NAICS 541910)	221	2,456	7,231	2.99	1.07	0.83
Photography Studios, Portrait (NAICS 541921)	314	2,005	6,299	5.25	1.08	0.89
Commercial Photography (NAICS 541922)	13	564	1,845	0.7	1.02	0.87
Translation and Interpretation Services (NAICS 541930)	68	458	4,609	1.76	0.38	1.01
Veterinary Services (NAICS 541940)	151	7,667	31,307	0.55	0.91	0.97
All Other Professional, Scientific, and Technical Services (NAICS 541990)	233	8,068	32,392	0.8	0.89	0.94

Source: JobsEQ, 2018 - Dallas County Community College District

Addison LQ > than Greater Region (by  $\geq 0.5$ )

Addison LQ < than Greater Region (by  $\geq 0.5$ )

Addison LQ and Greater Region LQ are not significantly different



# Target Industry Analysis – Advertising and Other Professional Scientific, and Technical Services (NAICS 5418 - 5419)

Table 3.10.B: Existing Industry Wage Comparison	Addison Average Cluster Wage (Annual)	Greater Region Average Cluster Wage (Annual)	Texas Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Advertising Agencies (NAICS 541810)	\$95,898	\$88,294	\$80,587	\$98,736
Public Relations Agencies (NAICS 541820)	\$80,530	\$87,740	\$81,819	\$99,503
Media Buying Agencies (NAICS 541830)	\$82,833	\$82,270	\$81,987	\$115,103
Media Representatives (NAICS 541840)	\$119,238	\$106,713	\$89,705	\$102,901
Outdoor Advertising (NAICS 541850)	\$62,133	\$67,917	\$57,631	\$60,886
Direct Mail Advertising (NAICS 541860)	\$74,491	\$70,608	\$63,555	\$58,960
Advertising Material Distribution Services (NAICS 541870)	\$76,981	\$58,920	\$56,321	\$48,733
Other Services Related to Advertising (NAICS 541890)	\$50,558	\$36,331	\$34,011	\$37,009
Marketing Research and Public Opinion Polling (NAICS 541910)	\$99,669	\$76,309	\$65,482	\$75,711
Photography Studios, Portrait (NAICS 541921)	\$31,309	\$32,032	\$29,474	\$31,300
Commercial Photography (NAICS 541922)	\$49,284	\$41,847	\$37,256	\$43,215
Translation and Interpretation Services (NAICS 541930)	\$58,412	\$46,679	\$37,963	\$41,674
Veterinary Services (NAICS 541940)	\$41,014	\$41,099	\$39,734	\$39,158
All Other Professional, Scientific, and Technical Services (NAICS 541990)	\$93,343	\$83,146	\$88,332	\$75,088

Source: JobsEQ, 2018 - Dallas County Community College District

Addison wages < 2 or more region wages  
Addison wages > 2 or more region wages

# Target Industry Analysis – Advertising and Other Professional Scientific, and Technical Services (NAICS 5418 - 5419)

Table 3.10.C: Existing Industry Growth Comparison	Addison 5-year Growth (2013 - 2017)	Addison 10-year Projected Growth (2017 - 2027)	Greater Region 5-year Growth (2013 - 2017)	Greater Region 10-year Projected Growth (2017 - 2027)	Texas 5-year Growth (2013-2017)	Texas 10-year Projected Growth (2017-2027)	U.S. 5-year Growth (2013 - 2017)	U.S. 10-year Projected Growth (2017 - 2027)
Advertising Agencies (NAICS 541810)	(10.5%)	1.0%	1.8%	1.2%	1.9%	1.3%	2.3%	0.3%
Public Relations Agencies (NAICS 541820)	1.9%	1.0%	4.1%	1.3%	4.0%	1.4%	1.8%	0.3%
Media Buying Agencies (NAICS 541830)	(2.8%)	1.4%	2.2%	1.4%	6.0%	1.3%	4.7%	0.3%
Media Representatives (NAICS 541840)	7.2%	1.0%	(9.2%)	1.2%	(6.0%)	1.4%	(2.3%)	0.3%
Outdoor Advertising (NAICS 541850)	14.1%	1.0%	(9.2%)	1.2%	0.9%	1.3%	2.1%	0.3%
Direct Mail Advertising (NAICS 541860)	1.4%	1.0%	(8.9%)	1.1%	(6.7%)	1.2%	(2.0%)	0.3%
Advertising Material Distribution Services (NAICS 541870)	(5.7%)	1.0%	4.0%	1.0%	3.7%	1.2%	(1.6%)	0.3%
Other Services Related to Advertising (NAICS 541890)	(11.0%)	1.0%	4.6%	1.8%	9.0%	1.9%	6.6%	0.3%
Marketing Research and Public Opinion Polling (NAICS 541910)	(1.3%)	2.0%	0.2%	2.2%	4.1%	2.4%	(2.6%)	1.3%
Photography Studios, Portrait (NAICS 541921)	16.6%	(10.1%)	0.8%	(3.2%)	(2.1%)	(3.1%)	(2.6%)	(4.8%)
Commercial Photography (NAICS 541922)	3.0%	(0.7%)	3.7%	(1.1%)	5.1%	(1.3%)	3.5%	(2.9%)
Translation and Interpretation Services (NAICS 541930)	(11.8%)	2.0%	(3.7%)	2.0%	10.3%	2.3%	5.5%	1.2%
Veterinary Services (NAICS 541940)	(13.3%)	2.3%	4.1%	2.7%	4.6%	2.5%	3.9%	1.6%
All Other Professional, Scientific, and Technical Services (NAICS 541990)	2.6%	1.7%	(0.4%)	2.1%	0.1%	2.0%	2.6%	1.0%

Source: JobsEQ, 2018 - Dallas County Community College District

Industry growth greater than or equal to one percent in the respective region and time frame.

Industry growth is less than or equal to negative one percent in the respective region and time frame.

# Target Industry Analysis – Advertising and Other Professional Scientific, and Technical Services (NAICS 5418 - 5419)

Rank	Table 3.10.D Ranked by Number of Jobs, 5-Year Growth and Cluster Concentration	Regional Number of Jobs (2017)	Regional 5-year Growth	Regional Cluster Concentration (LQ)
1	All Other Professional, Scientific, and Technical Services (NAICS 541990)	8,068 (1)	(0.4%)	0.89
2	Veterinary Services (NAICS 541940)	7,667 (2)	4.1% (2)*	0.91
3	Advertising Agencies (NAICS 541810)	5,740 (3)	1.8%	1.19 (2)
4	Marketing Research and Public Opinion Polling (NAICS 541910)	2,456 (4)	0.2%	1.07 (4)
5	Other Services Related to Advertising (NAICS 541890)	2,222 (5)	4.6% (1)	0.95
6	Photography Studios, Portrait (NAICS 541921)	2,005	0.8%	1.08 (3)
7	Public Relations Agencies (NAICS 541820)	1,265	4.1% (2)*	0.81
8	Direct Mail Advertising (NAICS 541860)	1,051	(8.9%)	1.02
9	Advertising Material Distribution Services (NAICS 541870)	978	4.0% (4)	3.68 (1)
10	Outdoor Advertising (NAICS 541850)	616	(9.2%)	0.68
11	Media Representatives (NAICS 541840)	585	(9.2%)	1.05 (5)
12	Commercial Photography (NAICS 541922)	564	3.7% (5)	1.02
13	Translation and Interpretation Services (NAICS 541930)	458	(3.7%)	0.38
14	Media Buying Agencies (NAICS 541830)	346	2.2%	0.88

Source: JobsEQ, 2018 - Dallas County Community College District

Top five (5) in each (# Jobs, Growth, LQ)

\* Indicates a tie

# Target Industry Analysis – Advertising and Other Professional Scientific, and Technical Services (NAICS 5418 - 5419)

Table 3.10.E: Existing Industry Talent Comparison	Addison Average Concentration	Greater Region Average Concentration	Addison Average Projected Growth	Greater Region Average Projected Growth	Addison Talent Score
Advertising Agencies (NAICS 541810) Public Relations Agencies (NAICS 541820) Media Buying Agencies (NAICS 541830) Media Representatives (NAICS 541840) Outdoor Advertising (NAICS 541850) Direct Mail Advertising (NAICS 541860) Advertising Material Distribution Services (NAICS 541870) Other Services Related to Advertising (NAICS 541890)	1.51	1.07	1.64%	1.82%	87
Marketing Research and Public Opinion Polling (NAICS 541910) Translation and Interpretation Services (NAICS 541930) All Other Professional, Scientific, and Technical Services (NAICS 541990)	0.69	0.89	2.34%	2.62%	104
Photography Studios, Portrait (NAICS 541921) Commercial Photography (NAICS 541922)	1.51	1.12	-1.18%	0.68%	171
Veterinary Services (NAICS 541940)	0.69	0.89	2.34%	2.62%	108

Source: JobsEQ, 2018 - Dallas County Community College District

Top 25% of All Talent Scores

Target Industry Analysis –  
Management of Companies  
and Enterprises AND  
Administrative and Support and  
Waste Management and  
Remediation Services

# Target Industry Analysis – Management of Companies and Business Supports (NAICS 55 - 5614)

## SUMMARY OF MANAGEMENT OF COMPANIES AND BUSINESS SUPPORTS

This industry employs over 218,000 people in the greater region, with Temporary Help Services (NAICS 561320) being the largest subsector of employment. Addison has a significantly higher concentration than the greater region in the following subsectors of this industry:

- Offices of Other Holding Companies (NAICS 551112)
- Corporate, Subsidiary, and Regional Managing Offices (NAICS 551114)
- Office Administrative Services (NAICS 561110)
- Facilities Support Services (NAICS 561210)
- Employment Placement Agencies (NAICS 561311)
- Executive Search Services (NAICS 561312)
- Temporary Help Services (NAICS 561320)
- All Other Business Support Services (NAICS 561499)

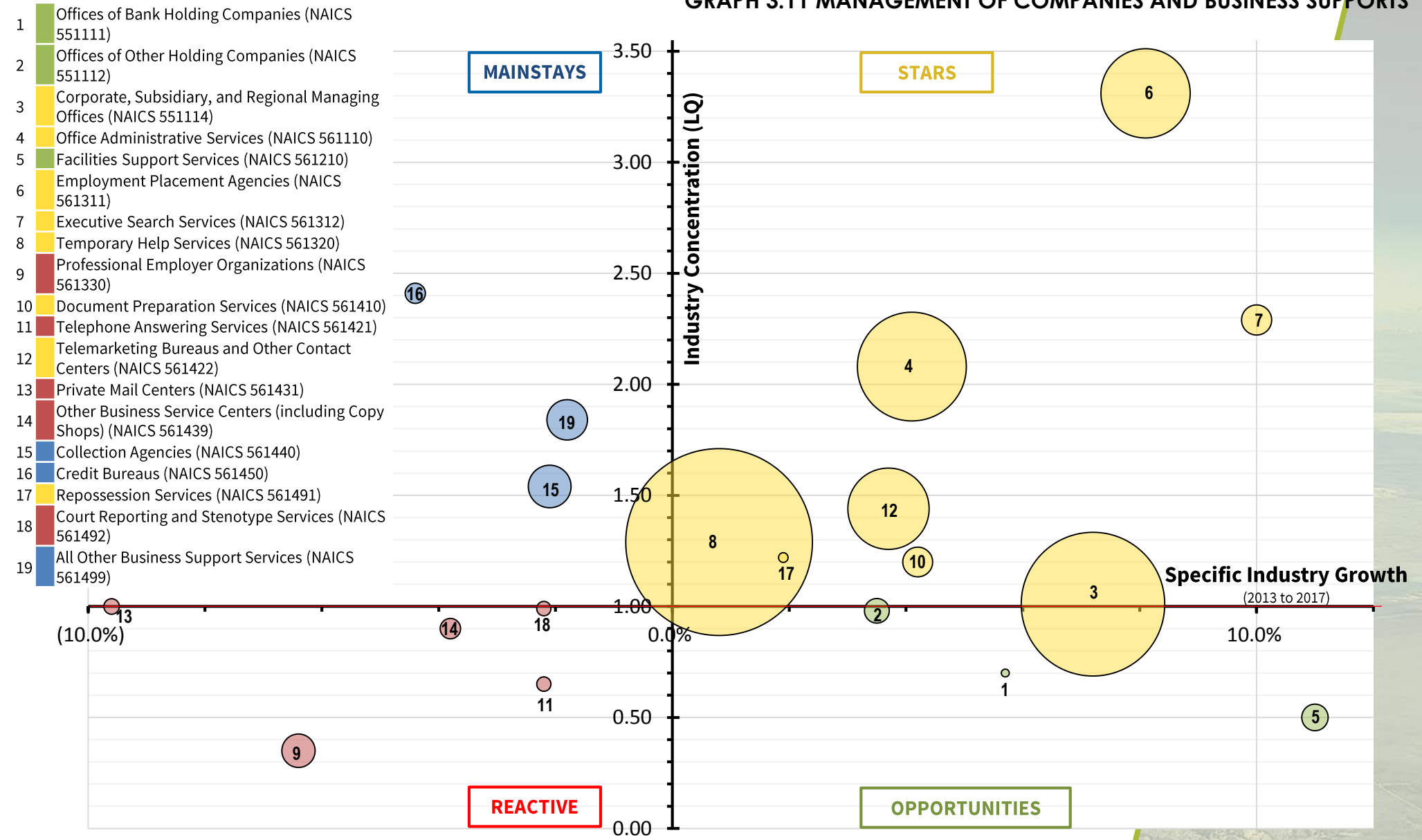
Wages are generally higher in Addison compared to the greater region, state and national averages, with only five of the subsectors in this industry having lower wages than at least two of the comparison regions.

Almost half of subsectors within this industry have experienced significant growth over the past 5-year period in Addison, and nearly all are projected to experience significant growth over the next 10-year period as well. Two subsectors have experienced significant growth in all regions and all time periods (*entire row highlighted green*): Office Administrative Services (NAICS 561110) and Telemarketing Bureaus and Other Contact Centers (NAICS 561422).



# Target Industry Analysis – Management of Companies and Business Supports (NAICS 55 - 5614)

**GRAPH 3.11 MANAGEMENT OF COMPANIES AND BUSINESS SUPPORTS**



Circle Size = Number of employees in the Greater Region  
Source: JobsEQ, 2018 - Dallas County Community College District

Total Employees in Greater Region: 218,432

○ = 10,000 employees

**Ady Advantage**  
STRATEGY MATTERS

# Target Industry Analysis – Management of Companies and Business Supports (NAICS 55 - 5614)

Table 3.11.A: Existing Industry Concentration Comparison	Addison Total Employment	Greater Region Total Employment	Texas Total Employment	Addison Location Quotient	Greater Region Location Quotient	Texas Location Quotient
Offices of Bank Holding Companies (NAICS 551111)	0	200	781	0	0.7	0.71
Offices of Other Holding Companies (NAICS 551112)	89	1,577	5,051	1.73	0.98	0.83
Corporate, Subsidiary, and Regional Managing Offices (NAICS 551114)	3,979	48,970	122,283	2.54	1.01	0.66
Office Administrative Services (NAICS 561110)	1,299	28,250	90,926	2.97	2.08	1.76
Facilities Support Services (NAICS 561210)	189	1,804	14,459	1.63	0.5	1.05
Employment Placement Agencies (NAICS 561311)	919	19,108	43,945	4.95	3.31	2
Executive Search Services (NAICS 561312)	151	2,313	4,481	4.64	2.29	1.16
Temporary Help Services (NAICS 561320)	10,097	82,484	232,353	4.9	1.29	0.95
Professional Employer Organizations (NAICS 561330)	9	2,799	11,497	0.03	0.35	0.38
Document Preparation Services (NAICS 561410)	45	2,241	8,064	0.75	1.2	1.13
Telephone Answering Services (NAICS 561421)	12	568	1,947	0.41	0.65	0.58
Telemarketing Bureaus and Other Contact Centers (NAICS 561422)	217	15,861	61,071	0.61	1.44	1.45
Private Mail Centers (NAICS 561431)	8	663	2,511	0.35	1	0.99
Other Business Service Centers (including Copy Shops) (NAICS 561439)	23	1,103	3,379	0.59	0.9	0.72
Collection Agencies (NAICS 561440)	154	4,497	13,924	1.64	1.54	1.25
Credit Bureaus (NAICS 561450)	7	1,090	2,804	0.49	2.41	1.62
Repossession Services (NAICS 561491)	2	277	1,176	0.24	1.22	1.36
Court Reporting and Stenotype Services (NAICS 561492)	10	568	2,266	0.56	0.99	1.03
All Other Business Support Services (NAICS 561499)	414	4,059	10,185	5.84	1.84	1.21

Source: JobsEQ, 2018 - Dallas County Community College District

Addison LQ > than Greater Region (by  $\geq 0.5$ )  
 Addison LQ < than Greater Region (by  $\geq 0.5$ )  
 Addison LQ and Greater Region LQ are not significantly different

# Target Industry Analysis – Management of Companies and Business Supports (NAICS 55 - 5614)

Table 3.11.B: Existing Industry Wage Comparison	Addison Average Cluster Wage (Annual)	Greater Region Average Cluster Wage (Annual)	Texas Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Offices of Bank Holding Companies (NAICS 551111)	n/a	\$404,928	\$192,928	\$154,969
Offices of Other Holding Companies (NAICS 551112)	\$150,165	\$119,979	\$133,404	\$163,377
Corporate, Subsidiary, and Regional Managing Offices (NAICS 551114)	\$117,059	\$117,502	\$129,487	\$117,632
Office Administrative Services (NAICS 561110)	\$98,940	\$92,605	\$79,998	\$73,527
Facilities Support Services (NAICS 561210)	\$45,328	\$61,700	\$51,392	\$48,118
Employment Placement Agencies (NAICS 561311)	\$34,806	\$35,406	\$39,555	\$43,610
Executive Search Services (NAICS 561312)	\$80,621	\$82,338	\$78,915	\$89,373
Temporary Help Services (NAICS 561320)	\$35,947	\$34,734	\$35,824	\$32,874
Professional Employer Organizations (NAICS 561330)	\$105,576	\$104,683	\$69,378	\$45,691
Document Preparation Services (NAICS 561410)	\$31,729	\$27,232	\$24,933	\$28,648
Telephone Answering Services (NAICS 561421)	\$37,146	\$32,345	\$32,836	\$36,549
Telemarketing Bureaus and Other Contact Centers (NAICS 561422)	\$44,805	\$62,520	\$36,851	\$36,306
Private Mail Centers (NAICS 561431)	\$28,894	\$26,758	\$24,711	\$28,299
Other Business Service Centers (including Copy Shops) (NAICS 561439)	\$53,106	\$52,515	\$42,604	\$43,855
Collection Agencies (NAICS 561440)	\$52,526	\$53,224	\$44,774	\$45,575
Credit Bureaus (NAICS 561450)	\$65,687	\$130,024	\$101,955	\$121,637
Repossession Services (NAICS 561491)	\$57,385	\$45,844	\$40,180	\$41,120
Court Reporting and Stenotype Services (NAICS 561492)	\$57,324	\$52,460	\$48,622	\$48,324
All Other Business Support Services (NAICS 561499)	\$58,012	\$53,060	\$53,569	\$62,581

Source: JobsEQ, 2018 - Dallas County Community College District

Addison wages < 2 or more region wages

Addison wages > 2 or more region wages

# Target Industry Analysis – Management of Companies and Business Supports (NAICS 55 - 5614)

Table 3.11.C: Existing Industry Growth Comparison	Addison 5-year Growth (2013 - 2017)	Addison 10-year Projected Growth (2017 - 2027)	Greater Region 5-year Growth (2013 - 2017)	Greater Region 10-year Projected Growth (2017 - 2027)	Texas 5-year Growth (2013-2017)	Texas 10-year Projected Growth (2017-2027)	U.S. 5-year Growth (2013 - 2017)	U.S. 10-year Projected Growth (2017 - 2027)
Offices of Bank Holding Companies (NAICS 551111)	n/a	0.0%	5.7%	2.1%	0.6%	1.6%	(4.0%)	0.6%
Offices of Other Holding Companies (NAICS 551112)	(9.9%)	1.3%	3.5%	1.7%	0.1%	1.7%	1.5%	0.6%
Corporate, Subsidiary, and Regional Managing Offices (NAICS 551114)	6.6%	1.3%	7.2%	1.6%	8.4%	1.6%	2.7%	0.6%
Office Administrative Services (NAICS 561110)	5.2%	2.6%	4.1%	2.8%	3.9%	2.8%	3.0%	1.9%
Facilities Support Services (NAICS 561210)	8.2%	1.9%	11.0%	2.1%	(0.4%)	1.9%	3.1%	1.2%
Employment Placement Agencies (NAICS 561311)	17.0%	1.2%	8.1%	1.4%	3.6%	1.5%	0.9%	0.5%
Executive Search Services (NAICS 561312)	1.1%	1.2%	10.0%	1.5%	3.7%	1.5%	3.0%	0.5%
Temporary Help Services (NAICS 561320)	5.2%	1.6%	0.8%	1.8%	1.4%	1.9%	3.1%	0.9%
Professional Employer Organizations (NAICS 561330)	(6.3%)	1.2%	(6.4%)	1.3%	(0.8%)	1.6%	(0.5%)	0.5%
Document Preparation Services (NAICS 561410)	(7.7%)	1.6%	4.2%	2.0%	2.9%	1.8%	0.9%	1.0%
Telephone Answering Services (NAICS 561421)	4.4%	2.7%	(2.2%)	3.1%	(2.3%)	3.0%	(0.9%)	2.3%
Telemarketing Bureaus and Other Contact Centers (NAICS 561422)	17.1%	3.0%	3.7%	3.2%	4.7%	3.0%	3.4%	2.4%
Private Mail Centers (NAICS 561431)	(26.2%)	1.7%	(9.6%)	2.3%	(2.2%)	2.0%	0.2%	1.1%
Other Business Service Centers (including Copy Shops) (NAICS 561439)	11.8%	1.8%	(3.8%)	2.1%	(3.2%)	2.0%	(1.1%)	1.1%
Collection Agencies (NAICS 561440)	(12.6%)	1.8%	(2.1%)	2.4%	(2.7%)	2.1%	(1.7%)	1.2%
Credit Bureaus (NAICS 561450)	(1.4%)	1.8%	(4.4%)	2.7%	(1.1%)	2.7%	0.7%	1.2%
Repossession Services (NAICS 561491)	(13.1%)	1.4%	1.9%	2.0%	4.4%	2.0%	1.6%	1.0%
Court Reporting and Stenotype Services (NAICS 561492)	(6.6%)	1.4%	(2.2%)	1.9%	(2.9%)	1.7%	(4.0%)	0.9%
All Other Business Support Services (NAICS 561499)	12.5%	1.8%	(1.8%)	2.1%	(2.2%)	2.1%	2.5%	1.1%

Source: JobsEQ, 2018 - Dallas County Community College District

Industry growth greater than or equal to one percent in the respective region and time frame.

Industry growth is less than or equal to negative one percent in the respective region and time frame.

# Target Industry Analysis – Management of Companies and Business Supports (NAICS 55 - 5614)

Rank	Table 3.11.D Ranked by Number of Jobs, 5-Year Growth and Cluster Concentration	Regional Number of Jobs (2017)	Regional 5-year Growth	Regional Cluster Concentration (LQ)
1	Temporary Help Services (NAICS 561320)	82,484 (1)	0.8%	1.29 (8)
2	Corporate, Subsidiary, and Regional Managing Offices (NAICS 551114)	48,970 (2)	7.2% (4)	1.01
3	Office Administrative Services (NAICS 561110)	28,250 (3)	4.1% (7)	2.08 (4)
4	Employment Placement Agencies (NAICS 561311)	19,108 (4)	8.1% (3)	3.31 (1)
5	Telemarketing Bureaus and Other Contact Centers (NAICS 561422)	15,861 (5)	3.7% (8)	1.44 (7)
6	Collection Agencies (NAICS 561440)	4,497 (6)	(2.1%)	1.54 (6)
7	All Other Business Support Services (NAICS 561499)	4,059 (7)	(1.8%)	1.84 (5)
8	Professional Employer Organizations (NAICS 561330)	2,799 (8)	(6.4%)	0.35
9	Executive Search Services (NAICS 561312)	2,313	10.0% (2)	2.29 (3)
10	Document Preparation Services (NAICS 561410)	2,241	4.2% (6)	1.2
11	Facilities Support Services (NAICS 561210)	1,804	11.0% (1)	0.5
12	Offices of Other Holding Companies (NAICS 551112)	1,577	3.5%	0.98
13	Other Business Service Centers (including Copy Shops) (NAICS 561439)	1,103	(3.8%)	0.9
14	Credit Bureaus (NAICS 561450)	1,090	(4.4%)	2.41 (2)
15	Private Mail Centers (NAICS 561431)	663	(9.6%)	1
16	Telephone Answering Services (NAICS 561421)	568	(2.2%)	0.65
17	Court Reporting and Stenotype Services (NAICS 561492)	568	(2.2%)	0.99
18	Repossession Services (NAICS 561491)	277	1.9%	1.22
19	Offices of Bank Holding Companies (NAICS 551111)	200	5.7% (5)	0.7

Source: JobsEQ, 2018 - Dallas County Community College District  
Top eight (8) in each (# Jobs, Growth, LQ)



# Target Industry Analysis – Management of Companies and Business Supports (NAICS 55 - 5614)

Table 3.11.E: Existing Industry Talent Comparison	Addison Average Concentration	Greater Region Average Concentration	Addison Average Projected Growth	Greater Region Average Projected Growth	Addison Talent Score
Offices of Bank Holding Companies (NAICS 551111) Offices of Other Holding Companies (NAICS 551112) Corporate, Subsidiary, and Regional Managing Offices (NAICS 551114)	1.53	1.09	1.62%	1.84%	83
Office Administrative Services (NAICS 561110)	1.48	1.17	1.22%	1.50%	122
Facilities Support Services (NAICS 561210)	0.98	0.88	1.22%	1.42%	175
Employment Placement Agencies (NAICS 561311) Executive Search Services (NAICS 561312) Professional Employer Organizations (NAICS 561330)	1.76	1.20	1.78%	1.60%	79
Temporary Help Services (NAICS 561320)	1.69	1.22	1.90%	1.62%	72
Document Preparation Services (NAICS 561410) Telephone Answering Services (NAICS 561421) Telemarketing Bureaus and Other Contact Centers (NAICS 561422) Private Mail Centers (NAICS 561431) Other Business Service Centers (including Copy Shops) (NAICS 561439) Collection Agencies (NAICS 561440) Credit Bureaus (NAICS 561450) Repossession Services (NAICS 561491) Court Reporting and Stenotype Services (NAICS 561492) All Other Business Support Services (NAICS 561499)	1.98	1.40	1.04%	1.38%	116

Source: JobsEQ, 2018 - Dallas County Community College District

Top 25% of All Talent Scores



# Target Industry Analysis – Travel, Security, Building and Other Support Services (NAICS 5615 - 5619)

## SUMMARY OF TRAVEL, SECURITY, BUILDING AND OTHER SUPPORT SERVICES

This industry employs over 103,000 people in the greater region, with Janitorial Services (NAICS 561720) being the largest subsector of employment. Addison has a significantly higher concentration than the greater region in the following subsectors of this industry:

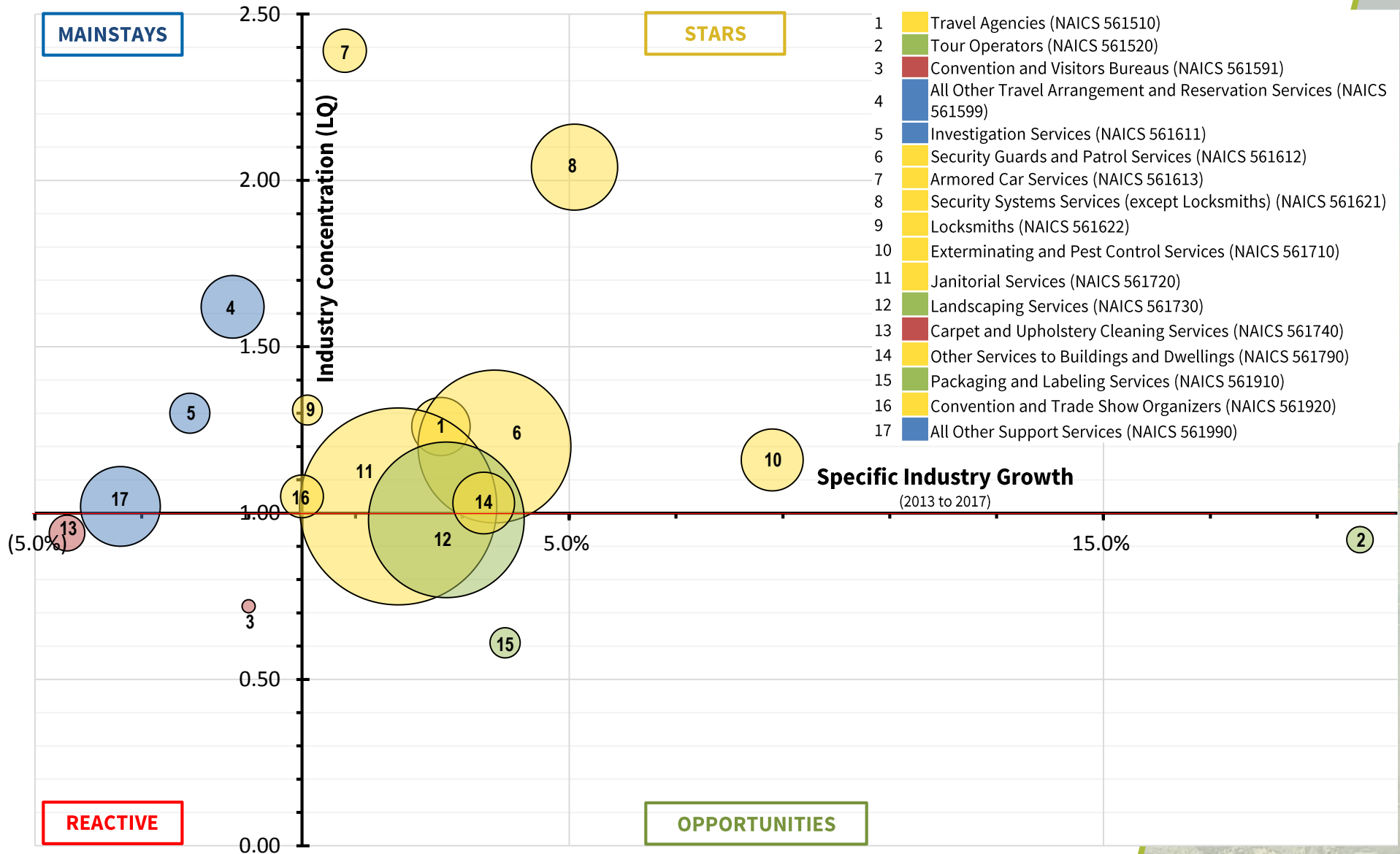
- Travel Agencies (NAICS 561510)
- Investigation Services (NAICS 561611)
- Security Guards and Patrol Services (NAICS 561612)

Wages are generally higher in Addison compared to the greater region, state and national averages, with only about 25% of the subsectors in this industry having lower wages than at least two of the comparison regions.

Most of subsectors within this industry have experienced significant growth over the past 5-year period in Addison, and nearly all are projected to experience significant growth over the next 10-year period as well. Four subsectors have experienced significant growth in all regions and all time periods (*entire row highlighted green*): Security Systems Services (except Locksmiths) (NAICS 561621), Janitorial Services (NAICS 561720), Landscaping Services (NAICS 561730) and Other Services to Buildings and Dwellings (NAICS 561790).

# Target Industry Analysis – Travel, Security, Building and Other Support Services (NAICS 5615 - 5619)

GRAPH 3.12 TRAVEL, SECURITY, BUILDING AND OTHER SUPPORT SERVICES



Circle Size = Number of employees in the Greater Region

Source: JobsEQ, 2018 - Dallas County Community College District

Total Employees in Greater Region: 103,578

○ = 6,000 employees

# Target Industry Analysis – Travel, Security, Building and Other Support Services (NAICS 5615 - 5619)

Table 3.12.A: Existing Industry Concentration Comparison	Addison Total Employment	Greater Region Total Employment	Texas Total Employment	Addison Location Quotient	Greater Region Location Quotient	Texas Location Quotient
Travel Agencies (NAICS 561510)	250	2,889	7,255	3.38	1.26	0.83
Tour Operators (NAICS 561520)	3	625	1,162	0.15	0.92	0.45
Convention and Visitors Bureaus (NAICS 561591)	8	171	734	1.06	0.72	0.81
All Other Travel Arrangement and Reservation Services (NAICS 561599)	129	3329	8,990	1.96	1.62	1.15
Investigation Services (NAICS 561611)	106	1,390	5,019	3.08	1.3	1.23
Security Guards and Patrol Services (NAICS 561612)	894	19,293	60,206	1.73	1.2	0.98
Armored Car Services (NAICS 561613)	31	1,600	2,905	1.44	2.39	1.14
Security Systems Services (except Locksmiths) (NAICS 561621)	179	6,217	17,242	1.82	2.04	1.48
Locksmiths (NAICS 561622)	28	794	3,717	1.43	1.31	1.61
Exterminating and Pest Control Services (NAICS 561710)	25	3,250	11,016	0.28	1.16	1.03
Janitorial Services (NAICS 561720)	1,114	31,975	121,921	1.1	1.02	1.02
Landscaping Services (NAICS 561730)	211	20,000	69,715	0.32	0.98	0.9
Carpet and Upholstery Cleaning Services (NAICS 561740)	36	1,107	4,026	0.95	0.94	0.9
Other Services to Buildings and Dwellings (NAICS 561790)	137	3,235	13,939	1.35	1.03	1.16
Packaging and Labeling Services (NAICS 561910)	8	811	2,198	0.18	0.61	0.43
Convention and Trade Show Organizers (NAICS 561920)	35	1,581	3,674	0.73	1.05	0.64
All Other Support Services (NAICS 561990)	128	5,311	16,204	0.76	1.02	0.82

Source: JobsEQ, 2018 - Dallas County Community College District

Addison LQ > than Greater Region (by  $\geq 0.5$ )

Addison LQ < than Greater Region (by  $\geq 0.5$ )

Addison LQ and Greater Region LQ are not significantly different

# Target Industry Analysis – Travel, Security, Building and Other Support Services (NAICS 5615 - 5619)

Table 3.12.B: Existing Industry Wage Comparison	Addison Average Cluster Wage (Annual)	Greater Region Average Cluster Wage (Annual)	Texas Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Travel Agencies (NAICS 561510)	\$65,003	\$64,558	\$63,980	\$63,128
Tour Operators (NAICS 561520)	\$66,612	\$83,496	\$65,608	\$50,687
Convention and Visitors Bureaus (NAICS 561591)	\$139,233	\$131,156	\$81,022	\$53,572
All Other Travel Arrangement and Reservation Services (NAICS 561599)	\$56,811	\$62,591	\$57,408	\$55,612
Investigation Services (NAICS 561611)	\$47,089	\$40,354	\$37,767	\$39,971
Security Guards and Patrol Services (NAICS 561612)	\$27,057	\$26,762	\$26,116	\$27,178
Armored Car Services (NAICS 561613)	\$71,347	\$70,033	\$55,791	\$40,483
Security Systems Services (except Locksmiths) (NAICS 561621)	\$56,703	\$58,331	\$54,513	\$57,743
Locksmiths (NAICS 561622)	\$43,311	\$38,350	\$29,789	\$35,409
Exterminating and Pest Control Services (NAICS 561710)	\$45,110	\$46,614	\$44,220	\$44,706
Janitorial Services (NAICS 561720)	\$22,331	\$22,998	\$21,311	\$22,618
Landscaping Services (NAICS 561730)	\$36,702	\$38,927	\$35,315	\$35,125
Carpet and Upholstery Cleaning Services (NAICS 561740)	\$44,338	\$39,476	\$39,604	\$34,849
Other Services to Buildings and Dwellings (NAICS 561790)	\$53,994	\$47,336	\$34,983	\$36,827
Packaging and Labeling Services (NAICS 561910)	\$40,288	\$41,592	\$41,337	\$42,550
Convention and Trade Show Organizers (NAICS 561920)	\$58,804	\$59,897	\$49,928	\$50,819
All Other Support Services (NAICS 561990)	\$53,090	\$56,501	\$43,089	\$44,275

Source: JobsEQ, 2018 - Dallas County Community College District

Addison wages < 2 or more region wages

Addison wages > 2 or more region wages

# Target Industry Analysis – Travel, Security, Building and Other Support Services (NAICS 5615 - 5619)

Table 3.12.C: Existing Industry Growth Comparison	Addison 5-year Growth (2013 - 2017)	Addison 10-year Projected Growth (2017 - 2027)	Greater Region 5-year Growth (2013 - 2017)	Greater Region 10-year Projected Growth (2017 - 2027)	Texas 5-year Growth (2013-2017)	Texas 10-year Projected Growth (2017-2027)	U.S. 5-year Growth (2013 - 2017)	U.S. 10-year Projected Growth (2017 - 2027)
Travel Agencies (NAICS 561510)	7.3%	(1.0%)	2.6%	(0.5%)	1.7%	(0.3%)	2.0%	(1.6%)
Tour Operators (NAICS 561520)	(12.2%)	0.4%	19.8%	1.2%	9.6%	0.8%	2.1%	(0.9%)
Convention and Visitors Bureaus (NAICS 561591)	n/a	(0.1%)	(1.0%)	0.0%	5.3%	0.0%	2.6%	(0.9%)
All Other Travel Arrangement and Reservation Services (NAICS 561599)	31.9%	(0.2%)	(1.3%)	(0.1%)	4.9%	0.1%	2.8%	(1.0%)
Investigation Services (NAICS 561611)	6.6%	1.6%	(2.1%)	1.9%	0.4%	1.9%	(0.7%)	0.9%
Security Guards and Patrol Services (NAICS 561612)	(3.0%)	1.6%	3.6%	1.7%	2.6%	1.7%	2.5%	0.9%
Armored Car Services (NAICS 561613)	50.0%	1.6%	0.8%	1.7%	0.6%	1.7%	(0.1%)	1.0%
Security Systems Services (except Locksmiths) (NAICS 561621)	8.8%	1.8%	5.1%	1.9%	4.3%	2.0%	3.1%	1.1%
Locksmiths (NAICS 561622)	3.6%	1.7%	0.1%	1.9%	3.5%	1.8%	1.9%	1.0%
Exterminating and Pest Control Services (NAICS 561710)	16.8%	1.3%	8.8%	1.8%	5.4%	1.5%	4.0%	0.6%
Janitorial Services (NAICS 561720)	12.8%	1.7%	1.8%	2.0%	2.1%	1.8%	1.6%	1.0%
Landscaping Services (NAICS 561730)	3.0%	1.6%	2.7%	2.1%	2.2%	2.0%	3.1%	1.0%
Carpet and Upholstery Cleaning Services (NAICS 561740)	(6.4%)	1.6%	(4.4%)	2.0%	(2.6%)	1.9%	(1.0%)	1.0%
Other Services to Buildings and Dwellings (NAICS 561790)	2.8%	1.7%	3.4%	2.1%	3.6%	1.9%	1.9%	1.0%
Packaging and Labeling Services (NAICS 561910)	(9.0%)	1.3%	3.8%	1.4%	3.1%	1.3%	2.1%	0.5%
Convention and Trade Show Organizers (NAICS 561920)	(13.0%)	1.3%	0.0%	1.5%	3.0%	1.6%	3.7%	0.6%
All Other Support Services (NAICS 561990)	(4.2%)	1.3%	(3.4%)	1.5%	1.1%	1.6%	0.7%	0.6%

Source: JobsEQ, 2018 - Dallas County Community College District

Industry growth greater than or equal to one percent in the respective region and time frame.

Industry growth is less than or equal to negative one percent in the respective region and time frame.

# Target Industry Analysis – Travel, Security, Building and Other Support Services (NAICS 5615 - 5619)

Rank	Table 3.12.D Ranked by Number of Jobs, 5-Year Growth and Cluster Concentration	Regional Number of Jobs (2017)	Regional 5-year Growth	Regional Cluster Concentration (LQ)
1	Janitorial Services (NAICS 561720)	31,975 (1)	1.8%	1.02
2	Landscaping Services (NAICS 561730)	20,000 (2)	2.7% (7)	0.98
3	Security Guards and Patrol Services (NAICS 561612)	19,293 (3)	3.6% (5)	1.2 (7)
4	Security Systems Services (except Locksmiths) (NAICS 561621)	6,217 (4)	5.1% (3)	2.04 (2)
5	All Other Support Services (NAICS 561990)	5,311 (5)	(3.4%)	1.02
6	All Other Travel Arrangement and Reservation Services (NAICS 561599)	3,329 (6)	(1.3%)	1.62 (3)
7	Exterminating and Pest Control Services (NAICS 561710)	3,250 (7)	8.8% (2)	1.16
8	Other Services to Buildings and Dwellings (NAICS 561790)	3,235	3.4% (6)	1.03
9	Travel Agencies (NAICS 561510)	2,889	2.6%	1.26 (6)
10	Armored Car Services (NAICS 561613)	1,600	0.8%	2.39 (1)
11	Convention and Trade Show Organizers (NAICS 561920)	1,581	0.0%	1.05
12	Investigation Services (NAICS 561611)	1,390	(2.1%)	1.3 (5)
13	Carpet and Upholstery Cleaning Services (NAICS 561740)	1,107	(4.4%)	0.94
14	Packaging and Labeling Services (NAICS 561910)	811	3.8% (4)	0.61
15	Locksmiths (NAICS 561622)	794	0.1%	1.31 (4)
16	Tour Operators (NAICS 561520)	625	19.8% (1)	0.92
17	Convention and Visitors Bureaus (NAICS 561591)	171	(1.0%)	0.72

Source: JobsEQ, 2018 - Dallas County Community College District

Top seven (7) in each (# Jobs, Growth, LQ)



# Target Industry Analysis – Travel, Security, Building and Other Support Services (NAICS 5615 - 5619)

Table 3.12.E: Existing Industry Talent Comparison	Addison Average Concentration	Greater Region Average Concentration	Addison Average Projected Growth	Greater Region Average Projected Growth	Addison Talent Score
Travel Agencies (NAICS 561510) Tour Operators (NAICS 561520) Convention and Visitors Bureaus (NAICS 561591) All Other Travel Arrangement and Reservation Services (NAICS 561599)	1.72	1.51	0.94%	1.28%	121
Investigation Services (NAICS 561611) Security Guards and Patrol Services (NAICS 561612) Armored Car Services (NAICS 561613)	1.42	1.15	1.42%	1.54%	117
Security Systems Services (except Locksmiths) (NAICS 561621) Locksmiths (NAICS 561622)	1.61	1.43	1.36%	1.62%	90
Janitorial Services (NAICS 561720) Carpet and Upholstery Cleaning Services (NAICS 561740) Other Services to Buildings and Dwellings (NAICS 561790)	0.67	0.92	1.52%	1.82%	140
Exterminating and Pest Control Services (NAICS 561710)	1.21	1.14	1.12%	1.38%	148
Landscaping Services (NAICS 561730)	0.83	0.99	1.42%	1.74%	137
Packaging and Labeling Services (NAICS 561910) Convention and Trade Show Organizers (NAICS 561920) All Other Support Services (NAICS 561990)	1.07	1.05	1.42%	1.44%	143

Source: JobsEQ, 2018 - Dallas County Community College District

Top 25% of All Talent Scores

# Target Industry Analysis – Waste Management and Remediation Services (NAICS 562)

## SUMMARY OF WASTE MANAGEMENT AND REMEDIATION SERVICES

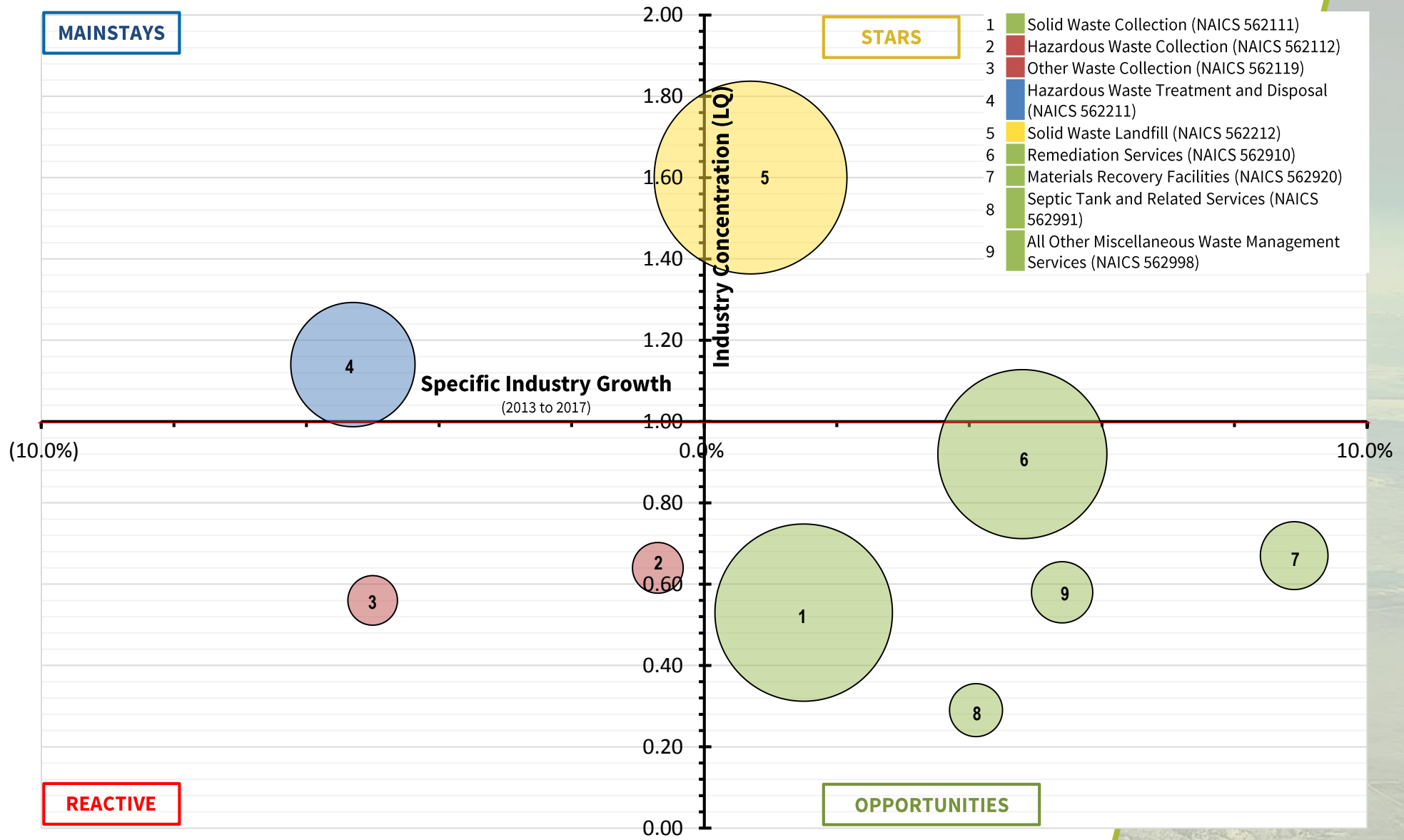
This industry employs over 7,000 people in the greater region, with Solid Waste Landfill (NAICS 562212) being the largest subsector of employment. Addison has a significantly higher concentration than the greater region in none of the subsectors of this industry.

Wages are mixed in Addison compared to the greater region, state and national averages, with almost half of the subsectors in this industry having lower wages than at least two of the comparison regions.

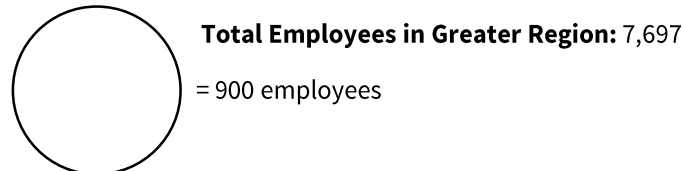
More than half of subsectors within this industry have experienced significant growth over the past 5-year period in Addison, and nearly all are projected to experience significant growth over the next 10-year period as well. Four subsectors have experienced significant growth in almost all regions and time periods (*seven columns highlighted green*): Solid Waste Collection (NAICS 562111), Remediation Services (NAICS 562910), Septic Tank and Related Services (NAICS 562991) and All Other Miscellaneous Waste Management Services (NAICS 562998).

# Target Industry Analysis – Waste Management and Remediation Services (NAICS 562)

GRAPH 3.13 WASTE MANAGEMENT AND REMEDIATION SERVICES



Circle Size = Number of employees in the Greater Region  
Source: JobsEQ, 2018 - Dallas County Community College District



**Ady Advantage**  
STRATEGY MATTERS

# Target Industry Analysis – Waste Management and Remediation Services (NAICS 562)

Table 3.13.A: Existing Industry Concentration Comparison	Addison Total Employment	Greater Region Total Employment	Texas Total Employment	Addison Location Quotient	Greater Region Location Quotient	Texas Location Quotient
Solid Waste Collection (NAICS 562111)	20	1,873	10,860	0.17	0.53	0.81
Hazardous Waste Collection (NAICS 562112)	1	159	1,005	0.18	0.64	1.07
Other Waste Collection (NAICS 562119)	0	152	824	0	0.56	0.8
Hazardous Waste Treatment and Disposal (NAICS 562211)	1	923	3,623	0.05	1.14	1.18
Solid Waste Landfill (NAICS 562212)	29	2,207	11,657	0.66	1.6	2.22
Remediation Services (NAICS 562910)	27	1,701	6,087	0.45	0.92	0.87
Materials Recovery Facilities (NAICS 562920)	None	280	1,079	None	0.67	0.68
Septic Tank and Related Services (NAICS 562991)	4	173	2,287	0.2	0.29	1.01
All Other Miscellaneous Waste Management Services (NAICS 562998)	1	229	1,575	0.05	0.58	1.04

Source: JobsEQ, 2018 - Dallas County Community College District

Addison LQ > than Greater Region (by  $\geq 0.5$ )

Addison LQ < than Greater Region (by  $\geq 0.5$ )

Addison LQ and Greater Region LQ are not significantly different

# Target Industry Analysis – Waste Management and Remediation Services (NAICS 562)

Table 3.13.B: Existing Industry Wage Comparison	Addison Average Cluster Wage (Annual)	Greater Region Average Cluster Wage (Annual)	Texas Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Solid Waste Collection (NAICS 562111)	\$51,883	\$57,228	\$50,689	\$54,266
Hazardous Waste Collection (NAICS 562112)	\$62,758	\$66,084	\$58,658	\$63,751
Other Waste Collection (NAICS 562119)	n/a	\$42,533	\$45,955	\$47,811
Hazardous Waste Treatment and Disposal (NAICS 562211)	\$36,607	\$67,730	\$70,765	\$75,677
Solid Waste Landfill (NAICS 562212)	\$85,215	\$85,402	\$82,974	\$66,977
Remediation Services (NAICS 562910)	\$55,053	\$56,637	\$53,991	\$63,057
Materials Recovery Facilities (NAICS 562920)	None	\$73,986	\$57,892	\$49,591
Septic Tank and Related Services (NAICS 562991)	\$50,586	\$54,292	\$45,960	\$48,786
All Other Miscellaneous Waste Management Services (NAICS 562998)	\$64,937	\$63,545	\$58,806	\$57,445

Source: JobsEQ, 2018 - Dallas County Community College District

Addison wages < 2 or more region wages

Addison wages > 2 or more region wages

# Target Industry Analysis – Waste Management and Remediation Services (NAICS 562)

Table 3.13.C: Existing Industry Growth Comparison	Addison 5-year Growth (2013 – 2017)	Addison 10-year Projected Growth (2017 – 2027)	Greater Region 5-year Growth (2013 - 2017)	Greater Region 10-year Projected Growth (2017 - 2027)	Texas 5-year Growth (2013-2017)	Texas 10-year Projected Growth (2017-2027)	U.S. 5-year Growth (2013 - 2017)	U.S. 10-year Projected Growth (2017 - 2027)
Solid Waste Collection (NAICS 562111)	(6.7%)	2.9%	1.5%	3.2%	5.3%	3.1%	3.0%	2.3%
Hazardous Waste Collection (NAICS 562112)	(19.7%)	2.9%	(0.7%)	3.1%	7.7%	2.9%	3.4%	2.3%
Other Waste Collection (NAICS 562119)	n/a	1.4%	(5.0%)	2.9%	1.6%	3.0%	2.1%	2.3%
Hazardous Waste Treatment and Disposal (NAICS 562211)	(38.3%)	(0.8%)	(5.3%)	(0.1%)	(0.4%)	(0.4%)	(0.3%)	(1.6%)
Solid Waste Landfill (NAICS 562212)	9.2%	(0.8%)	0.7%	0.2%	3.0%	(0.7%)	0.2%	(1.6%)
Remediation Services (NAICS 562910)	(5.4%)	2.6%	4.8%	2.8%	1.5%	2.7%	1.7%	2.0%
Materials Recovery Facilities (NAICS 562920)	None	None	8.9%	3.0%	(2.4%)	2.7%	2.4%	2.0%
Septic Tank and Related Services (NAICS 562991)	(0.7%)	2.6%	4.1%	2.9%	3.0%	2.6%	4.0%	1.9%
All Other Miscellaneous Waste Management Services (NAICS 562998)	(30.8%)	2.5%	5.4%	2.7%	9.6%	2.7%	3.6%	2.0%

Source: JobsEQ, 2018 - Dallas County Community College District

Industry growth greater than or equal to one percent in the respective region and time frame.

Industry growth is less than or equal to negative one percent in the respective region and time frame.



# Target Industry Analysis – Waste Management and Remediation Services (NAICS 562)

Rank	Table 3.13.D Ranked by Number of Jobs, 5-Year Growth and Cluster Concentration	Regional Number of Jobs (2017)	Regional 5-year Growth	Regional Cluster Concentration (LQ)
1	Solid Waste Landfill (NAICS 562212)	2,207 (1)	0.7%	1.6 (1)
2	Solid Waste Collection (NAICS 562111)	1,873 (2)	1.5%	0.53
3	Remediation Services (NAICS 562910)	1,701 (3)	4.8% (3)	0.92 (3)
4	Hazardous Waste Treatment and Disposal (NAICS 562211)	923	(5.3%)	1.14 (2)
5	Materials Recovery Facilities (NAICS 562920)	280	8.9% (1)	0.67
6	All Other Miscellaneous Waste Management Services (NAICS 562998)	229	5.4% (2)	0.58
7	Septic Tank and Related Services (NAICS 562991)	173	4.1%	0.29
8	Hazardous Waste Collection (NAICS 562112)	159	(0.7%)	0.64
9	Other Waste Collection (NAICS 562119)	152	(5.0%)	0.56

Source: JobsEQ, 2018 - Dallas County Community College District

Top three (3) in each (# Jobs, Growth, LQ)

# Target Industry Analysis – Waste Management and Remediation Services (NAICS 562)

Table 3.13.E: Existing Industry Talent Comparison	Addison Average Concentration	Greater Region Average Concentration	Addison Average Projected Growth	Greater Region Average Projected Growth	Addison Talent Score
Solid Waste Collection (NAICS 562111) Hazardous Waste Collection (NAICS 562112) Other Waste Collection (NAICS 562119)	0.89	1.07	1.44%	1.56%	139
Hazardous Waste Treatment and Disposal (NAICS 562211) Solid Waste Landfill (NAICS 562212)	0.64	0.97	1.74%	1.96%	121
Remediation Services (NAICS 562910) Materials Recovery Facilities (NAICS 562920) Septic Tank and Related Services (NAICS 562991) All Other Miscellaneous Waste Management Services (NAICS 562998)	0.70	1.03	1.88%	2.04%	103

Source: JobsEQ, 2018 - Dallas County Community College District

Top 25% of All Talent Scores

# Target Industry Analysis – Accommodation and Food Services

# Target Industry Analysis – Accommodation and Food Services (NAICS 72)

## SUMMARY OF ACCOMMODATION AND FOOD SERVICES

This industry employs over 303,000 people in the greater region, with Full-Service Restaurants (NAICS 722511) being the largest subsector of employment. Addison has a significantly higher concentration than the greater region in the following subsectors of this industry:

- Hotels (except Casino Hotels) and Motels (NAICS 721110)
- Mobile Food Services (NAICS 722330)

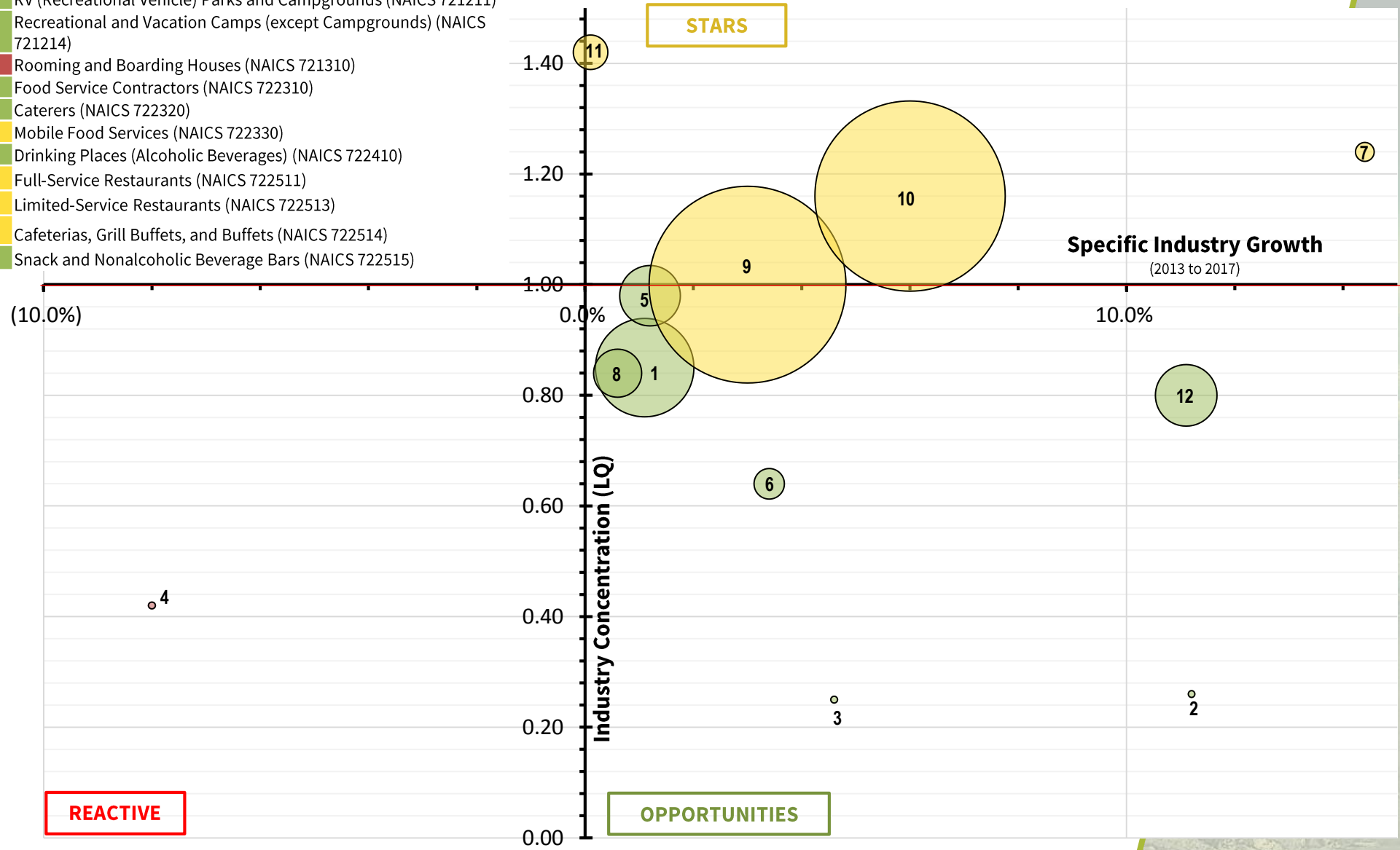
Wages are higher in Addison compared to the greater region, state and national averages, with all of the subsectors in this industry having higher wages than at least two of the comparison regions.

More than half of subsectors within this industry have experienced significant growth over the past 5-year period in Addison, and nearly all are projected to experience significant growth over the next 10-year period as well. Three subsectors have experienced significant growth in all regions and all time periods (*entire row highlighted green*): Food Service Contractors (NAICS 722310), Caterers (NAICS 722320), and Mobile Food Services (NAICS 722330).

# Target Industry Analysis – Accommodation and Food Services (NAICS 72)

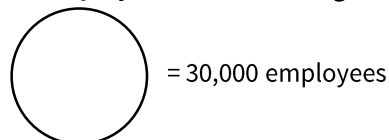
GRAPH 3.14 ACCOMMODATION AND FOOD SERVICES

- 1 Hotels (except Casino Hotels) and Motels (NAICS 721110)
- 2 RV (Recreational Vehicle) Parks and Campgrounds (NAICS 721211)
- 3 Recreational and Vacation Camps (except Campgrounds) (NAICS 721214)
- 4 Rooming and Boarding Houses (NAICS 721310)
- 5 Food Service Contractors (NAICS 722310)
- 6 Caterers (NAICS 722320)
- 7 Mobile Food Services (NAICS 722330)
- 8 Drinking Places (Alcoholic Beverages) (NAICS 722410)
- 9 Full-Service Restaurants (NAICS 722511)
- 10 Limited-Service Restaurants (NAICS 722513)
- 11 Cafeterias, Grill Buffets, and Buffets (NAICS 722514)
- 12 Snack and Nonalcoholic Beverage Bars (NAICS 722515)



Circle Size = Number of employees in the Greater Region  
Source: JobsEQ, 2018 - Dallas County Community College District

Total Employees in Greater Region: 303,647



# Target Industry Analysis – Accommodation and Food Services (NAICS 72)

Table 3.14.A: Existing Industry Concentration Comparison	Addison Total Employment	Greater Region Total Employment	Texas Total Employment	Addison Location Quotient	Greater Region Location Quotient	Texas Location Quotient
Hotels (except Casino Hotels) and Motels (NAICS 721110)	1,841	30,483	117,143	1.59	0.85	0.85
RV (Recreational Vehicle) Parks and Campgrounds (NAICS 721211)	2	195	2,342	0.07	0.26	0.83
Recreational and Vacation Camps (except Campgrounds) (NAICS 721214)	5	204	3,321	0.18	0.25	1.06
Rooming and Boarding Houses (NAICS 721310)	7	211	1,385	0.42	0.42	0.72
Food Service Contractors (NAICS 722310)	203	11,765	45,082	0.53	0.98	0.99
Caterers (NAICS 722320)	135	3,092	13,803	0.87	0.64	0.75
Mobile Food Services (NAICS 722330)	84	1,247	5,181	2.6	1.24	1.35
Drinking Places (Alcoholic Beverages) (NAICS 722410)	381	7,510	34,334	1.33	0.84	1.01
Full-Service Restaurants (NAICS 722511)	4,819	120,277	460,257	1.25	1	1.01
Limited-Service Restaurants (NAICS 722513)	2,226	112,596	455,940	0.71	1.16	1.23
Cafeterias, Grill Buffets, and Buffets (NAICS 722514)	73	3,927	16,523	0.82	1.42	1.57
Snack and Nonalcoholic Beverage Bars (NAICS 722515)	154	12,140	45,131	0.31	0.8	0.78

Source: JobsEQ, 2018 - Dallas County Community College District

Addison LQ > than Greater Region (by  $\geq 0.5$ )

Addison LQ < than Greater Region (by  $\geq 0.5$ )

Addison LQ and Greater Region LQ are not significantly different



# Target Industry Analysis – Accommodation and Food Services (NAICS 72)

Table 3.14.B: Existing Industry Wage Comparison	Addison Average Cluster Wage (Annual)	Greater Region Average Cluster Wage (Annual)	Texas Average Cluster Wage (Annual)	U.S. Average Cluster Wage (Annual)
Hotels (except Casino Hotels) and Motels (NAICS 721110)	\$34,906	\$33,158	\$28,530	\$30,751
RV (Recreational Vehicle) Parks and Campgrounds (NAICS 721211)	\$24,400	\$21,438	\$21,854	\$24,723
Recreational and Vacation Camps (except Campgrounds) (NAICS 721214)	\$28,449	\$31,094	\$25,172	\$26,293
Rooming and Boarding Houses (NAICS 721310)	\$32,497	\$30,130	\$28,552	\$27,803
Food Service Contractors (NAICS 722310)	\$29,957	\$29,076	\$25,889	\$27,590
Caterers (NAICS 722320)	\$28,005	\$26,414	\$25,567	\$24,412
Mobile Food Services (NAICS 722330)	\$24,947	\$22,211	\$21,834	\$24,809
Drinking Places (Alcoholic Beverages) (NAICS 722410)	\$23,273	\$24,324	\$21,624	\$19,604
Full-Service Restaurants (NAICS 722511)	\$24,508	\$22,740	\$20,977	\$21,374
Limited-Service Restaurants (NAICS 722513)	\$18,456	\$17,388	\$16,474	\$16,088
Cafeterias, Grill Buffets, and Buffets (NAICS 722514)	\$19,961	\$20,010	\$19,770	\$18,658
Snack and Nonalcoholic Beverage Bars (NAICS 722515)	\$18,529	\$17,629	\$16,343	\$17,122

Source: JobsEQ, 2018 - Dallas County Community College District

Addison wages < 2 or more region wages

Addison wages > 2 or more region wages

# Target Industry Analysis – Accommodation and Food Services (NAICS 72)

Table 3.14.C: Existing Industry Growth Comparison	Addison 5-year Growth (2013 - 2017)	Addison 10-year Projected Growth (2017 - 2027)	Greater Region 5-year Growth (2013 - 2017)	Greater Region 10-year Projected Growth (2017 - 2027)	Texas 5-year Growth (2013-2017)	Texas 10-year Projected Growth (2017-2027)	U.S. 5-year Growth (2013 - 2017)	U.S. 10-year Projected Growth (2017 - 2027)
Hotels (except Casino Hotels) and Motels (NAICS 721110)	10.3%	0.9%	1.1%	1.1%	2.3%	1.0%	1.9%	0.2%
RV (Recreational Vehicle) Parks and Campgrounds (NAICS 721211)	(5.2%)	1.9%	11.2%	2.8%	4.7%	2.2%	2.7%	1.5%
Recreational and Vacation Camps (except Campgrounds) (NAICS 721214)	(10.4%)	2.2%	4.6%	2.6%	7.4%	2.0%	3.6%	1.5%
Rooming and Boarding Houses (NAICS 721310)	(21.0%)	1.4%	(8.0%)	1.7%	(1.6%)	1.4%	(1.3%)	0.6%
Food Service Contractors (NAICS 722310)	5.0%	2.0%	1.2%	2.4%	2.6%	2.2%	2.2%	1.4%
Caterers (NAICS 722320)	1.0%	2.0%	3.4%	2.1%	4.3%	2.1%	2.9%	1.3%
Mobile Food Services (NAICS 722330)	4.7%	2.0%	14.4%	2.1%	12.1%	1.9%	11.9%	1.0%
Drinking Places (Alcoholic Beverages) (NAICS 722410)	(2.6%)	0.0%	0.6%	0.3%	0.4%	0.3%	1.7%	(0.7%)
Full-Service Restaurants (NAICS 722511)	4.6%	1.4%	3.0%	1.7%	2.8%	1.6%	2.6%	0.7%
Limited-Service Restaurants (NAICS 722513)	7.8%	1.6%	6.0%	2.0%	5.0%	1.7%	3.6%	0.9%
Cafeterias, Grill Buffets, and Buffets (NAICS 722514)	(4.8%)	1.6%	0.1%	1.8%	0.1%	1.6%	(2.2%)	0.9%
Snack and Nonalcoholic Beverage Bars (NAICS 722515)	5.3%	1.6%	11.1%	2.0%	10.2%	1.9%	6.3%	0.9%

Source: JobsEQ, 2018 - Dallas County Community College District

Industry growth greater than or equal to one percent in the respective region and time frame.

Industry growth is less than or equal to negative one percent in the respective region and time frame.

# Target Industry Analysis – Accommodation and Food Services (NAICS 72)

Rank	Table 3.14.D Ranked by Number of Jobs, 5-Year Growth and Cluster Concentration	Regional Number of Jobs (2017)	Regional 5-year Growth	Regional Cluster Concentration (LQ)
1	Full-Service Restaurants (NAICS 722511)	120,277 (1)	3.0%	1 (4)
2	Limited-Service Restaurants (NAICS 722513)	112,596 (2)	6.0% (4)	1.16 (3)
3	Hotels (except Casino Hotels) and Motels (NAICS 721110)	30,483 (3)	1.1%	0.85
4	Snack and Nonalcoholic Beverage Bars (NAICS 722515)	12,140 (4)	11.1% (3)	0.8
5	Food Service Contractors (NAICS 722310)	11,765 (5)	1.2%	0.98 (5)
6	Drinking Places (Alcoholic Beverages) (NAICS 722410)	7,510	0.6%	0.84
7	Cafeterias, Grill Buffets, and Buffets (NAICS 722514)	3,927	0.1%	1.42 (1)
8	Caterers (NAICS 722320)	3,092	3.4%	0.64
9	Mobile Food Services (NAICS 722330)	1,247	14.4% (1)	1.24 (2)
10	Rooming and Boarding Houses (NAICS 721310)	211	(8.0%)	0.42
11	Recreational and Vacation Camps (except Campgrounds) (NAICS 721214)	204	4.6% (5)	0.25
12	RV (Recreational Vehicle) Parks and Campgrounds (NAICS 721211)	195	11.2% (2)	0.26

Source: JobsEQ, 2018 - Dallas County Community College District

Top five (5) in each (# Jobs, Growth, LQ)

# Target Industry Analysis – Accommodation and Food Services (NAICS 72)

Table 3.14.E: Existing Industry Talent Comparison	Addison Average Concentration	Greater Region Average Concentration	Addison Average Projected Growth	Greater Region Average Projected Growth	Addison Talent Score
Hotels (except Casino Hotels) and Motels (NAICS 721110)	1.27	0.94	1.38%	1.66%	133
RV (Recreational Vehicle) Parks and Campgrounds (NAICS 721211)	1.08	0.96	1.36%	1.58%	149
Recreational and Vacation Camps (except Campgrounds) (NAICS 721214)					
Rooming and Boarding Houses (NAICS 721310)	0.66	0.68	1.62%	1.72%	154
Food Service Contractors (NAICS 722310)					
Caterers (NAICS 722320)	0.73	0.96	1.48%	1.64%	144
Mobile Food Services (NAICS 722330)					
Drinking Places (Alcoholic Beverages) (NAICS 722410)	1.12	0.97	1.36%	1.68%	137
Full-Service Restaurants (NAICS 722511)	1.13	0.93	1.26%	1.62%	149
Limited-Service Restaurants (NAICS 722513)					
Cafeterias, Grill Buffets, and Buffets (NAICS 722514)	0.92	1.05	1.26%	1.62%	145
Snack and Nonalcoholic Beverage Bars (NAICS 722515)					

Source: JobsEQ, 2018 - Dallas County Community College District

Top 25% of All Talent Scores

# Target Industry Screening

# Target Industry Screening

## INTRODUCTION

The following section narrows down all of the target industries analyzed within the previous section by looking at regional concentration and past five year growth (denoted as a star or opportunity and highlighted green), projected U.S. growth (>1% highlighted green), Addison's concentration (>1.2 highlighted green) and the industry's talent score (top 25% highlighted green). A summary of the recommended target industries, based on both quantitative and qualitative data is provided at the end of this section.

Industry	Greater Region Chart Quadrant	Projected U.S. Growth	Addison Concentration	Talent Score	Include as a Target Industry?
Software Publishers (NAICS 511210)	Star	1.8%	1.95	58	Yes – Information Technology and Related Service
Data Processing, Hosting, and Related Services (NAICS 518210)	Mainstay	1.2%	2.7	35	
News Syndicates (NAICS 519110)	Opportunity	3.8%	6.38	49	
Internet Publishing and Broadcasting and Web Search Portals (NAICS 519130)	Opportunity	3.8%	0.28	49	
All Other Information Services (NAICS 519190)	Opportunity	3.5%	0.55	49	
Directory and Mailing List Publishers (NAICS 511140)	Star	-2.5%	0.39	196	No
All Other Publishers (NAICS 511199)	Star	-2.2%	2.78	196	
Motion Picture and Video Production (NAICS 512110)	Reactive	1.1%	0.28	202	
Motion Picture Theaters (except Drive-Ins) (NAICS 512131)	Star	0.1%	1.38	202	
Teleproduction and Other Postproduction Services (NAICS 512191)	Reactive	1.1%	0.11	202	
Sound Recording Studios (NAICS 512240)	Opportunity	-0.1%	3.59	162	
Other Sound Recording Industries (NAICS 512290)	Star	-0.5%	3.78	162	
Radio Networks (NAICS 515111)	Mainstay	-3.0%	0.96	212	
Radio Stations (NAICS 515112)	Opportunity	-3.1%	1.09	212	
Television Broadcasting (NAICS 515120)	Opportunity	0.3%	0.64	219	
Cable and Other Subscription Programming (NAICS 515210)	Reactive	-2.5%	1.48	153	
Wired Telecommunications Carriers (NAICS 517311)	Star	-1.9%	0.61	128	
Wireless Telecommunications Carriers (except Satellite) (NAICS 517312)	Mainstay	0.4%	1.02	128	
Satellite Telecommunications (NAICS 517410)	Reactive	-0.2%	0	128	
Telecommunications Resellers (NAICS 517911)	Mainstay	-2.1%	20.01	128	
All Other Telecommunications (NAICS 517919)	Star	-2.0%	1.31	128	
Libraries and Archives (NAICS 519120)	Reactive	4.0%	0.09	49	
Newspaper Publishers (NAICS 511110)	Reactive	-4.1%	0.04	209	
Periodical Publishers (NAICS 511120)	Reactive	-2.4%	1.13	196	
Book Publishers (NAICS 511130)	Reactive	-2.4%	0.32	196	

Source: JobsEQ, 2018 - Dallas County Community College District



# Target Industry Screening

Industry	Greater Region Chart Quadrant	Projected U.S. Growth	Addison Concentration	Talent Score	Include as a Target Industry?
Monetary Authorities-Central Bank (NAICS 521110)	Star	-2.3%	3.95	40	Yes – Specialized financial services
Commercial Banking (NAICS 522110)	Star	-0.3%	1.4	37	
Credit Card Issuing (NAICS 522210)	Star	1.1%	2.38	36	
Sales Financing (NAICS 522220)	Star	1.1%	5.29	36	
Real Estate Credit (NAICS 522292)	Mainstay	1.7%	21.03	60	
International Trade Financing (NAICS 522293)	Mainstay	1.7%	25.88	60	
Secondary Market Financing (NAICS 522294)	Mainstay	1.7%	72.71	60	
All Other Nondepository Credit Intermediation (NAICS 522298)	Mainstay	1.7%	6.51	60	
Mortgage and Nonmortgage Loan Brokers (NAICS 522310)	Star	2.1%	2.77	37	
Financial Transactions Processing, Reserve, and Clearinghouse Activities (NAICS 522320)	Star	2.1%	10.32	37	
Other Activities Related to Credit Intermediation (NAICS 522390)	Mainstay	2.1%	1.38	37	
Commodity Contracts Brokerage (NAICS 523140)	Star	-0.1%	2.26	32	
Miscellaneous Intermediation (NAICS 523910)	Star	1.8%	6.44	32	
Portfolio Management (NAICS 523920)	Star	1.9%	3.49	32	
Investment Advice (NAICS 523930)	Star	1.9%	4.11	32	
Trust, Fiduciary, and Custody Activities (NAICS 523991)	Mainstay	1.9%	11.6	32	
Miscellaneous Financial Investment Activities (NAICS 523999)	Star	2.0%	8.43	32	
Savings Institutions (NAICS 522120)	Reactive	-0.3%	3.56	37	No
Credit Unions (NAICS 522130)	Opportunity	-0.3%	0.29	37	
Other Depository Credit Intermediation (NAICS 522190)	Mainstay	-0.3%	22.94	37	
Consumer Lending (NAICS 522291)	Mainstay	1.7%	0.74	60	
Investment Banking and Securities Dealing (NAICS 523110)	Reactive	-0.1%	0.5	32	
Securities Brokerage (NAICS 523120)	Star	-0.1%	0.6	32	
Commodity Contracts Dealing (NAICS 523130)	Reactive	-0.1%	3.41	32	

Source: JobsEQ, 2018 - Dallas County Community College District

# Target Industry Screening

Industry	Greater Region Chart Quadrant	Projected U.S. Growth	Addison Concentration	Talent Score	Include as a Target Industry?
Claims Adjusting (NAICS 524291)	Star	1.8%	5.16	107	Yes – Specialized Financial Services
Third Party Administration of Insurance and Pension Funds (NAICS 524292)	Star	2.1%	3.64	107	
All Other Insurance Related Activities (NAICS 524298)	Star	2.0%	2.47	107	
Direct Life Insurance Carriers (NAICS 524113)	Star	0.1%	2.48	92	No
Direct Health and Medical Insurance Carriers (NAICS 524114)	Reactive	2.1%	0.78	60	
Direct Property and Casualty Insurance Carriers (NAICS 524126)	Star	-0.5%	2.76	98	
Direct Title Insurance Carriers (NAICS 524127)	Star	-0.5%	15.3	98	
Other Direct Insurance (except Life, Health, and Medical) Carriers (NAICS 524128)	Mainstay	-0.5%	7.42	98	
Reinsurance Carriers (NAICS 524130)	Reactive	0.1%	1.02	92	
Insurance Agencies and Brokerages (NAICS 524210)	Star	0.8%	4	113	
Other Financial Vehicles (NAICS 525990)	Mainstay	1.0%	0.53	94	

Source: JobsEQ, 2018 - Dallas County Community College District

# Target Industry Screening

Industry	Greater Region Chart Quadrant	Projected U.S. Growth	Addison Concentration	Talent Score	Include as a Target Industry?
Engineering Services (NAICS 541330)	Opportunity	1.2%	1.21	104	Yes – Engineering and R&D Services
Offices of Lawyers (NAICS 541110)	Star	0.2%	1.98	168	No
Title Abstract and Settlement Offices (NAICS 541191)	Star	0.2%	1.63	168	
All Other Legal Services (NAICS 541199)	Opportunity	0.2%	0.51	168	
Offices of Certified Public Accountants (NAICS 541211)	Star	0.7%	1.97	158	
Tax Preparation Services (NAICS 541213)	Star	0.7%	1.91	158	
Payroll Services (NAICS 541214)	Star	0.7%	0.94	158	
Other Accounting Services (NAICS 541219)	Star	0.7%	0.85	158	
Architectural Services (NAICS 541310)	Star	0.8%	3.03	105	
Landscape Architectural Services (NAICS 541320)	Opportunity	0.8%	2.27	105	
Drafting Services (NAICS 541340)	Star	0.8%	1.47	105	
Building Inspection Services (NAICS 541350)	Opportunity	0.8%	1.12	105	
Geophysical Surveying and Mapping Services (NAICS 541360)	Star	0.8%	0.5	105	
Surveying and Mapping (except Geophysical) Services (NAICS 541370)	Star	0.8%	1.98	105	
Testing Laboratories (NAICS 541380)	Opportunity	-0.1%	3.83	182	
Interior Design Services (NAICS 541410)	Star	0.7%	1.74	133	
Industrial Design Services (NAICS 541420)	Reactive	0.6%	0.62	133	
Graphic Design Services (NAICS 541430)	Opportunity	0.6%	2.5	133	
Other Specialized Design Services (NAICS 541490)	Opportunity	0.6%	1.21	133	

Source: JobsEQ, 2018 - Dallas County Community College District

# Target Industry Screening

Industry	Greater Region Chart Quadrant	Projected U.S. Growth	Addison Concentration	Talent Score	Include as a Target Industry?
Custom Computer Programming Services (NAICS 541511)	Star	1.9%	3.72	43	Yes- Information Technology and Related Services
Computer Systems Design Services (NAICS 541512)	Star	1.9%	3.11	43	
Computer Facilities Management Services (NAICS 541513)	Star	1.9%	0.48	43	
Other Computer Related Services (NAICS 541519)	Opportunity	1.9%	1.28	43	
Administrative Management and General Management Consulting Services (NAICS 541611)	Star	1.9%	4.03	63	Yes- Consulting Services
Human Resources Consulting Services (NAICS 541612)	Opportunity	2.0%	1.1	63	
Marketing Consulting Services (NAICS 541613)	Star	1.8%	0.77	63	
Process, Physical Distribution, and Logistics Consulting Services (NAICS 541614)	Star	2.0%	0.49	63	
Other Management Consulting Services (NAICS 541618)	Mainstay	1.9%	1.23	63	Yes- Engineering and R&D Services
Environmental Consulting Services (NAICS 541620)	Opportunity	1.9%	0.68	63	
Other Scientific and Technical Consulting Services (NAICS 541690)	Opportunity	1.9%	0.93	63	
Research and Development in Nanotechnology (NAICS 541713)	Star	1.5%	2.23	63	
Research and Development in Biotechnology (except Nanobiotechnology) (NAICS 541714)	Opportunity	1.5%	0.05	151	No
Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology) (NAICS 541715)	Reactive	1.5%	0.08	151	
Research and Development in the Social Sciences and Humanities (NAICS 541720)	Opportunity	-2.9%	5.63	194	

Source: JobsEQ, 2018 - Dallas County Community College District

# Target Industry Screening

Industry	Greater Region Chart Quadrant	Projected U.S. Growth	Addison Concentration	Talent Score	Include as a Target Industry?
Advertising Agencies (NAICS 541810)	Star	0.3%	1.49	87	Yes – Creative Services
Public Relations Agencies (NAICS 541820)	Opportunity	0.3%	1.62	87	
Advertising Material Distribution Services (NAICS 541870)	Star	0.3%	4.43	87	
Marketing Research and Public Opinion Polling (NAICS 541910)	Star	1.3%	2.99	104	
Media Buying Agencies (NAICS 541830)	Opportunity	0.3%	0.06	87	No
Media Representatives (NAICS 541840)	Mainstay	0.3%	5.33	87	
Outdoor Advertising (NAICS 541850)	Reactive	0.3%	0.52	87	
Direct Mail Advertising (NAICS 541860)	Mainstay	0.3%	3.11	87	
Other Services Related to Advertising (NAICS 541890)	Opportunity	0.3%	1.13	87	
Photography Studios, Portrait (NAICS 541921)	Star	-4.8%	5.25	171	
Commercial Photography (NAICS 541922)	Star	-2.9%	0.7	171	
Translation and Interpretation Services (NAICS 541930)	Reactive	1.2%	1.76	104	
Veterinary Services (NAICS 541940)	Opportunity	1.6%	0.55	108	
All Other Professional, Scientific, and Technical Services (NAICS 541990)	Reactive	1.0%	0.8	104	

Source: JobsEQ, 2018 - Dallas County Community College District

# Target Industry Screening

Industry	Greater Region Chart Quadrant	Projected U.S. Growth	Addison Concentration	Talent Score	Include as a Target Industry?
Offices of Other Holding Companies (NAICS 551112)	Opportunity	0.6%	1.73	83	Yes – Regional Offices and HQs
Corporate, Subsidiary, and Regional Managing Offices (NAICS 551114)	Star	0.6%	2.54	83	
Office Administrative Services (NAICS 561110)	Star	1.9%	2.97	122	
Facilities Support Services (NAICS 561210)	Opportunity	1.2%	1.63	175	
Employment Placement Agencies (NAICS 561311)	Star	0.5%	4.95	79	
Executive Search Services (NAICS 561312)	Star	0.5%	4.64	79	
Temporary Help Services (NAICS 561320)	Star	0.9%	4.9	72	
Offices of Bank Holding Companies (NAICS 551111)	Opportunity	0.6%	0	83	No
Professional Employer Organizations (NAICS 561330)	Reactive	0.5%	0.03	79	
Document Preparation Services (NAICS 561410)	Star	1.0%	0.75	116	
Telephone Answering Services (NAICS 561421)	Reactive	2.3%	0.41	116	
Telemarketing Bureaus and Other Contact Centers (NAICS 561422)	Star	2.4%	0.61	116	
Private Mail Centers (NAICS 561431)	Reactive	1.1%	0.35	116	
Other Business Service Centers (including Copy Shops) (NAICS 561439)	Reactive	1.1%	0.59	116	
Collection Agencies (NAICS 561440)	Mainstay	1.2%	1.64	116	
Credit Bureaus (NAICS 561450)	Mainstay	1.2%	0.49	116	
Repossession Services (NAICS 561491)	Star	1.0%	0.24	116	
Court Reporting and Stenotype Services (NAICS 561492)	Reactive	0.9%	0.56	116	
All Other Business Support Services (NAICS 561499)	Mainstay	1.1%	5.84	116	

Source: JobsEQ, 2018 - Dallas County Community College District



# Target Industry Screening

Industry	Greater Region Chart Quadrant	Projected U.S. Growth	Addison Concentration	Talent Score	Include as a Target Industry?
Travel Agencies (NAICS 561510)	Star	-1.6%	3.38	121	No, these industries tend to follow the economy.
Tour Operators (NAICS 561520)	Opportunity	-0.9%	0.15	121	
Convention and Visitors Bureaus (NAICS 561591)	Reactive	-0.9%	1.06	121	
All Other Travel Arrangement and Reservation Services (NAICS 561599)	Mainstay	-1.0%	1.96	121	
Investigation Services (NAICS 561611)	Mainstay	0.9%	3.08	117	
Security Guards and Patrol Services (NAICS 561612)	Star	0.9%	1.73	117	
Armored Car Services (NAICS 561613)	Star	1.0%	1.44	117	
Security Systems Services (except Locksmiths) (NAICS 561621)	Star	1.1%	1.82	90	
Locksmiths (NAICS 561622)	Star	1.0%	1.43	90	
Exterminating and Pest Control Services (NAICS 561710)	Star	0.6%	0.28	148	
Janitorial Services (NAICS 561720)	Star	1.0%	1.1	140	
Landscaping Services (NAICS 561730)	Opportunity	1.0%	0.32	137	
Carpet and Upholstery Cleaning Services (NAICS 561740)	Reactive	1.0%	0.95	140	
Other Services to Buildings and Dwellings (NAICS 561790)	Star	1.0%	1.35	140	
Packaging and Labeling Services (NAICS 561910)	Opportunity	0.5%	0.18	143	
Convention and Trade Show Organizers (NAICS 561920)	Star	0.6%	0.73	143	
All Other Support Services (NAICS 561990)	Mainstay	0.6%	0.76	143	

Source: JobsEQ, 2018 - Dallas County Community College District

# Target Industry Screening

Industry	Greater Region Chart Quadrant	Projected U.S. Growth	Addison Concentration	Talent Score	Include as a Target Industry?
Solid Waste Collection (NAICS 562111)	Opportunity	2.3%	0.17	139	No – Not an industry to focus on for recruitment
Hazardous Waste Collection (NAICS 562112)	Reactive	2.3%	0.18	139	
Other Waste Collection (NAICS 562119)	Reactive	2.3%	0	139	
Hazardous Waste Treatment and Disposal (NAICS 562211)	Mainstay	-1.6%	0.05	121	
Solid Waste Landfill (NAICS 562212)	Star	-1.6%	0.66	121	
Remediation Services (NAICS 562910)	Opportunity	2.0%	0.45	103	
Materials Recovery Facilities (NAICS 562920)	Opportunity	2.0%	None	103	
Septic Tank and Related Services (NAICS 562991)	Opportunity	1.9%	0.2	103	
All Other Miscellaneous Waste Management Services (NAICS 562998)	Opportunity	2.0%	0.05	103	

Source: JobsEQ, 2018 - Dallas County Community College District

# Target Industry Screening

Industry	Greater Region Chart Quadrant	Projected U.S. Growth	Addison Concentration	Talent Score	Include as a Target Industry?
Hotels (except Casino Hotels) and Motels (NAICS 721110)	Opportunity	0.2%	1.59	133	No, these will follow the economy and population. This industry group was analyzed to give a picture of what the potential restaurant opportunities are in Addison.
RV (Recreational Vehicle) Parks and Campgrounds (NAICS 721211)	Opportunity	1.5%	0.07	149	
Recreational and Vacation Camps (except Campgrounds) (NAICS 721214)	Opportunity	1.5%	0.18	149	
Rooming and Boarding Houses (NAICS 721310)	Reactive	0.6%	0.42	154	
Food Service Contractors (NAICS 722310)	Opportunity	1.4%	0.53	144	
Caterers (NAICS 722320)	Opportunity	1.3%	0.87	144	
Mobile Food Services (NAICS 722330)	Star	1.0%	2.6	144	
Drinking Places (Alcoholic Beverages) (NAICS 722410)	Opportunity	-0.7%	1.33	137	
Full-Service Restaurants (NAICS 722511)	Star	0.7%	1.25	149	
Limited-Service Restaurants (NAICS 722513)	Star	0.9%	0.71	145	
Cafeterias, Grill Buffets, and Buffets (NAICS 722514)	Star	0.9%	0.82	145	
Snack and Nonalcoholic Beverage Bars (NAICS 722515)	Opportunity	0.9%	0.31	145	

Source: JobsEQ, 2018 - Dallas County Community College District

# Recommended Target Industries

Based on the analysis in this section as well as key findings from the on-site visit, we recommend the following industries as targets for Addison to focus on for business recruitment/attraction and retention activities. Each target industry will have a specific strategy, as well as a set of key competitive advantages of the Town/region. Positioning for each target industry will be added to the following section of this report.

## Overarching Strategy:

- **Regional Offices and Headquarters** – All of the industries below are recommended target industries for Addison. Focus within each of these industries should be on those operations that are regional offices/headquarters for companies in these industries. In cases where a company is looking for a Texas presence or a Southwest US operation, Addison can make a solid business case for locating in the Town. This will be explored further in the positioning section of this report.
- **Airport-Related Industries** – There is land available at the airport that could support a new business. Many of the target industries below could focus on airport or aerospace-related services and support.

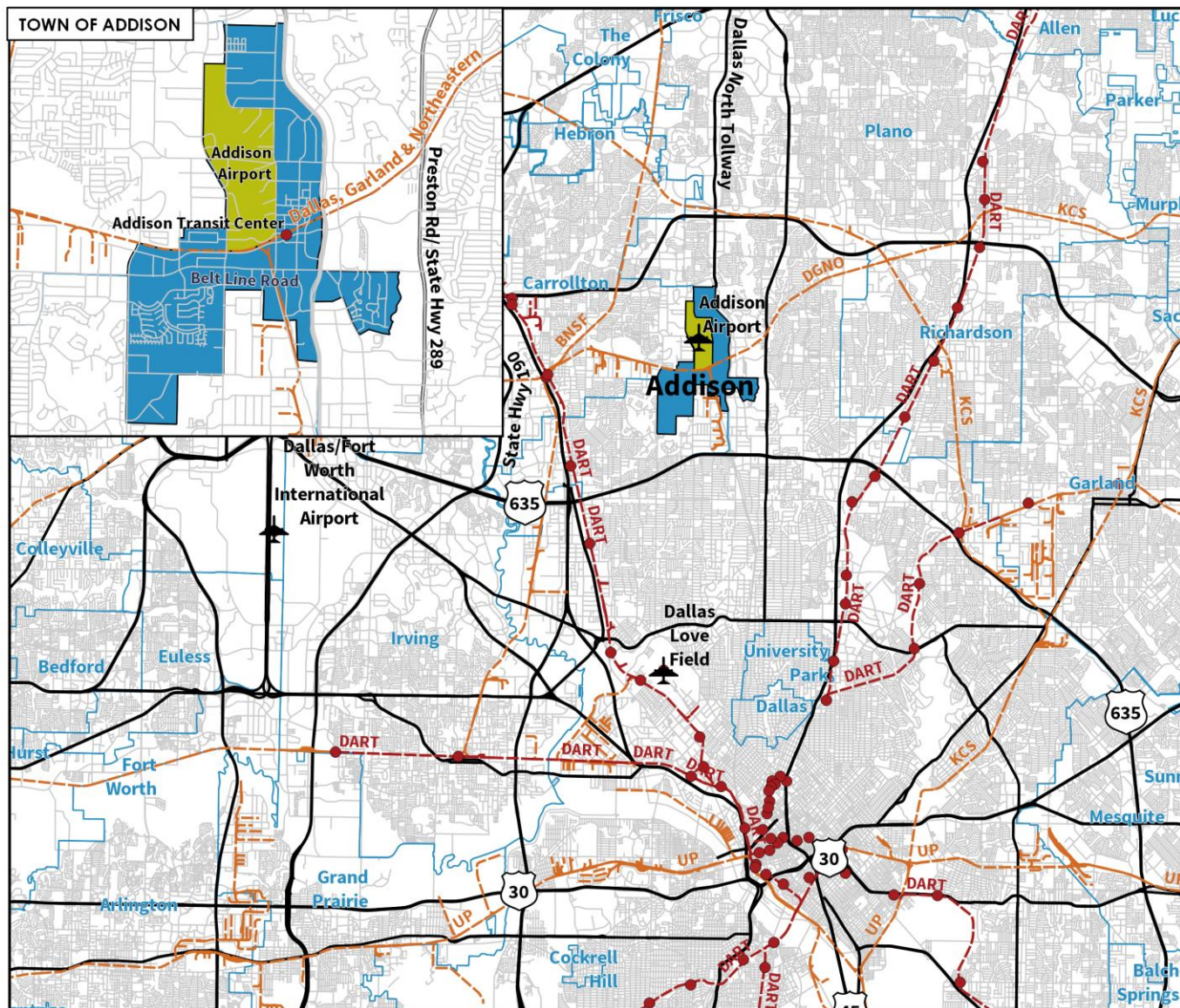
Target Industry	Examples of NAICS Codes of Focus	Comments
<b>Information Technology</b>	<ul style="list-style-type: none"> <li>• Software Publishers (NAICS 511210)</li> <li>• Data Processing, Hosting, and Related Services (NAICS 518210)</li> <li>• Internet Publishing and Broadcasting and Web Search Portals (NAICS 519130)</li> <li>• Custom Computer Programming Services (NAICS 541511)</li> <li>• Computer Systems Design Services (NAICS 541512)</li> </ul>	This is a high-growth industry that already has a strong presence in Addison and the greater region. Addison has the talent to support this industry. The Dallas-Fort Worth region also offers several educational institutions with strong computer engineering/science programs.
<b>Specialized Financial Services</b>	<ul style="list-style-type: none"> <li>• Credit Card Issuing (NAICS 522210)</li> <li>• International Trade Financing (NAICS 522293)</li> <li>• Financial Transactions Processing, Reserve, and Clearinghouse Activities (NAICS 522320)</li> <li>• Portfolio Management (NAICS 523920)</li> <li>• Claims Adjusting (NAICS 524291)</li> </ul>	Addison has a significantly high concentration in nearly every type of industry within finance and insurance. Many of these industries are projected to grow at a national level and Addison has the talent to support these operations.
<b>Engineering and R&amp;D Services</b>	<ul style="list-style-type: none"> <li>• Engineering Services (NAICS 541330)</li> <li>• Research and Development in Nanotechnology (NAICS 541713)</li> <li>• Other Scientific and Technical Consulting Services (NAICS 541690)</li> </ul>	Although these industries currently have a smaller concentration in Addison, however, they provide high-growth opportunities that could be taken advantage of by Addison. The Dallas-Fort Worth region offers several educational institutions with strong engineering programs. This may also provide opportunities for the airport.
<b>Consulting Services</b>	<ul style="list-style-type: none"> <li>• Administrative Management and General Management Consulting Services (NAICS 541611)</li> <li>• Human Resources Consulting Services (NAICS 541612)</li> <li>• Marketing Consulting Services (NAICS 541613)</li> <li>• Process, Physical Distribution, and Logistics Consulting Services (NAICS 541614)</li> </ul>	As there are already a high number of business service related industries in Addison and the Dallas metro area, consulting services centered around helping these business grow could be a good fit for Addison. The talent for this industry exists in Addison and these industries are projected to grow at a national level.
<b>Creative Services</b>	<ul style="list-style-type: none"> <li>• Advertising Agencies (NAICS 541810)</li> <li>• Public Relations Agencies (NAICS 541820)</li> <li>• Advertising Material Distribution Services (NAICS 541870)</li> <li>• Marketing Research and Public Opinion Polling (NAICS 541910)</li> </ul>	Addison has a history of being known as a creative community, which makes it a good home for a concentration of creative-related services. These industries have seen growth at a regional level, and are projected to continue to grow in the U.S.

# Section 7: Regional Positioning



# Core Economic Assets and Business Environment

## TRANSPORTATION INFRASTRUCTURE



### LEGEND

- Town of Addison
- Other municipalities
- Addison Airport
- Dallas regional airports
- DART stations
- DART light rail lines
- Railroad lines
- Highways
- Roads

Mapped by Ady Advantage, 2018  
Source data: US Census Bureau  
and US Geological Survey

0 2.5 miles

**Ady Advantage**



# Core Economic Assets and Business Environment

## INFRASTRUCTURE

### Highway



Addison is well connected regionally, located on the North Dallas Tollway about 15 miles from downtown Dallas. Nearby interstate access expanding access across the US includes I-635, which circles Dallas; I-35, which extends from Kansas in the north to the Mexican border in the south; and I-75, which extends from the Canadian border in the north to Dallas in the south. State highway 289 to the east extends from downtown Dallas to Lake Texoma on the Oklahoma-Texas border.

### Rail



The Dallas, Garland and Northeastern Railroad (DGNO) runs through Addison from east to west, with a spur line to the south in the Inwood area. This line will be the home of the new Dallas Area Rapid Transit (DART) light rail station called Addison Transit Center. Three class I railroads can be accessed in the Dallas-Fort Worth metro area: Burlington Northern Santa Fe (BNSF), Kansas City Southern (KCS), and Union Pacific (UP). UP operates the Dallas Intermodal Terminal southeast of the downtown area.

### Air



The Town of Addison owns a public airport, with a 7,200 foot runway and rental hangars serving many corporate clients. Located twenty miles away, the Dallas-Fort Worth International Airport, fourth busiest airport in the world, offers non-stop flights to 57 international airports and 176 other destinations across the US. Regional Airport, Dallas Love Field, located 12 miles away from Addison, has three runways and serves as the corporate headquarters of Southwest Airlines.

### Port



Located more than 250 miles from the nearest seaport, the Town of Addison has limited access to sea transport. The Addison Airport is one of the 29 custom ports of entry in the state of Texas, while Dallas/Fort Worth International Airport hosts the largest regional intermodal facility, followed by the Fort Worth Alliance.

### Utilities



Utilities were noted by employers to be average to competitive. Texas' gas and electric costs are lower than the US average, and compete with Louisiana for the lowest costs among neighboring states.



Neutral

# Core Economic Assets and Business Environment

## LABOR AND TALENT

### Availability of Low-Skilled Labor



Positions requiring a 2-year degree or less are considered low-skilled labor for this analysis. The degree of difficulty in finding and retaining low-skilled labor varied from employer to employer, depending on the type of position. Hospitality industry employers noted a difficulty of finding hostesses, line cooks and servers because the construction industry and others compete for this talent. Some employers noted a difficulty for this talent to find housing in Addison due to the high costs.

### Availability of Semi-Skilled/Skilled Labor



Semi-skilled and skilled workers are those with 4-year degrees in this analysis. Employers in the Town of Addison did not note a difficulty in attracting this type of talent, and many stakeholders noted the desire to continue to attract talent in the IT and financial sectors.

### Availability of Professional/Technical Labor



Professional and technical labor are considered those requiring a graduate level degrees in this analysis. It was not noted that the Town of Addison has any difficulty in attracting this type of talent.

### Access to Higher Education and Training Programs



While the Town of Addison does not have any colleges or universities within its limits, there are 76 institutions offering 2-year or 4-year degrees within 50 miles. Addison employers noted having a relationship with University of North Texas in Denton to present at their job fairs for recruitment purposes.

### Educational Attainment



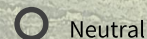
The Town of Addison's average educational attainment surpasses comparison MSA's, states and the national average for high school, 4-year and graduate level education of people 25 years and older. Two-year educational attainment rates in Addison, however, were lower than all comparison MSA's, states and the national average.



Marginally Competitive  
Competitive  
Very Competitive



Marginally Disadvantaged  
Disadvantaged  
Significantly Disadvantaged



Neutral

# Core Economic Assets and Business Environment

## REGULATIONS AND INCENTIVES

### State Regulatory and Permitting



Forbes ranks Texas 21<sup>st</sup> for Regulatory Environment under their “Forbes Best States for Business.” None of the interviewed employers noted any significant issues in regards to the regulatory environment of working in Texas.

### Local Regulatory and Permitting



None of the interviewed employers noted any significant issues in regards to the regulatory environment of working with the Town of Addison. In general, they felt that the various departments (i.e., economic development, fire inspector, police, etc.) were all business friendly. It was noted that Addison is even more business friendly than some neighboring communities, which was referred to several times as the “Addison Way”.

### State Incentives



The State of Texas offers a variety of incentives, with many tailored to specific industry sectors within the Town of Addison.

### Local Incentives



The Town of Addison and Dallas County offer the standard mix of tax increment financing and abatements commonly offered at the local level, as well as a number of investment and loan programs tailored to company expansion and renovation needs, including hotel industry major event support.

### State Business Climate



Texas ranks 2<sup>nd</sup> on “Forbes Best States for Business” list. As part of this overall ranking, Forbes ranks Texas 1<sup>st</sup> for Economic Climate, 2<sup>nd</sup> for Growth Prospects, 3<sup>rd</sup> for Business Costs, and 9<sup>th</sup> for Labor Supply. U.S. News & World Report ranks Texas the #36 state in the country.



○ Neutral

# Core Economic Assets and Business Environment

## KEY STATEWIDE INCENTIVES (FROM TEXAS ECONOMIC DEVELOPMENT CORPORATION)

- **Texas Enterprise Fund (TEF):** The Texas Enterprise Fund (TEF) awards “deal-closing” grants to companies considering a new project for which one Texas site is competing with other out-of-state sites. The fund serves as a financial incentive for those companies whose projects would contribute significant capital investment and new employment opportunities to the state’s economy.
- **Event Trust Funds:** The Event Trust Funds program is comprised of three separate funds—the Events Trust Fund, Major Events Reimbursement Program, and Motor Sports Racing Trust Fund—targeted at attracting various types of events to the State of Texas. The Funds can assist Texas communities with paying costs related to preparing for or conducting an event by depositing projected gains in various local and state taxes generated from the event in a dedicated event-specific trust fund to cover allowable expenses. A municipality, county, or non-profit local organizing committee endorsed by a Texas municipality or county which has been selected to host a qualified event, if the event location in that Texas municipality or county was selected through a highly competitive process by an independent site selection committee which considered other out-of-state locations may apply.
- **Product Development and Small Business Incubator Fund:** The Product Development and Small Business Incubator Fund offers long-term, asset-backed loans to near-bankable businesses commercializing new or improved products and small businesses or entities which foster growth of small businesses. The program targets those businesses which may be unable to obtain full financing or financing on workable terms in traditional capital markets.
- **Capital Access Program (CAP):** The Capital Access Program is a partnership between the State of Texas and selected non-profit lenders to increase access to financing for small and medium-sized businesses and non-profits which face barriers to accessing capital or fall outside of guidelines of conventional lending. The CAP facilitates loans which are underwritten by the participating non-profit lenders and supported by the state contributions to a loan loss reserve fund.
- **Jobs 4 Texas (J4T):** Jobs 4 Texas, or J4T, is an innovative program designed to increase small businesses' access to capital and enable private entrepreneurs to make market-driven decisions to grow jobs. The J4T program won a \$46.5 million award from the U.S. Department of the Treasury as part of the State Small Business Credit Initiative (SSBCI).



# Core Economic Assets and Business Environment

## KEY STATEWIDE INCENTIVES (FROM TEXAS ECONOMIC DEVELOPMENT CORPORATION)

- **BCL of Texas:** Established in 1990 as a statewide not-for-profit, BCL of Texas successfully promotes business and community development and provides business capital and commercial real estate loans throughout Texas. True to its mission to create jobs through business development, BCL of Texas has helped to create jobs for more than 5,000 Texans. In addition to providing businesses with counseling and technical assistance, BCL of Texas originates, underwrites, processes, closes and services business loans for healthy, growing businesses. BCL of Texas is a member of the nationwide NeighborWorks® Network, which engages in revitalization strategies that strengthen communities and transform lives.
- **LiftFund:** The mission of LiftFund is to provide credit and service to small businesses that do not have access to loans from commercial sources, and to provide leadership and service to the micro-lending field on a national level. LiftFund provides individual business loans from \$500 to \$1 million. Through the SBA 504 loan program, they are able to offer loans up to \$5.5 million. All loan funds repaid to LiftFund are reinvested in the community.
- **Skills Development Fund:** The Skills Development Fund is Texas' premier job-training program providing local customized training opportunities for Texas businesses and workers to increase skill levels and wages of the Texas workforce. The Texas Workforce Commission administers funding for the program. Success is achieved through collaboration among businesses, public community and technical colleges, Workforce Development Boards and economic development partners.

# Core Economic Assets and Business Environment

## KEY LOCAL & REGIONAL INCENTIVES

- **Grants:** Grant incentives may be available for new and expanding local companies. Incentives are based on job creation, average wages paid, capital investment, lease terms, and whether a company falls into one of the community's targeted industries. Ultimately, projects are evaluated to determine whether incentives have an impact on a company choosing Addison versus a competing community for investment. All offers for incentives are contingent upon City Council approval, and must demonstrate that the project will generate a positive return on investment for the community.
- **Hotel Support Program:** For groups looking at hosting major events at our full-service hotels, Addison can provide support to defray expenses to make Addison competitive with other full service hotels in the region through our Hotel Support Program. The program is available through any of our full service hotels which includes the Intercontinental, Marriott, and Crowne Plaza Hotels.
- **Chapter 380 Agreements:** Chapter 380 of the Local Government Code authorizes municipalities to offer incentives designed to promote economic development such as commercial and retail projects. Specifically, it provides for offering loans and grants of city funds or services at little or no cost to promote state and local economic development and to stimulate business and commercial activity. Among other criteria, Addison evaluates projects that create a minimum of 20 new full-time jobs, 10,000 square feet of Class A/B office space, or \$1 million capital investment in Real or Business Personal Property.
- **Texas Enterprise Project Program:** Under the Texas Enterprise Project Program, counties are allowed to nominate certain economic development projects to the Governor's Office for State financial assistance. Projects must be business expansion/retention (and create 300 jobs and invest \$13 million) or Fortune 1000 corporate headquarters (and create 100 jobs and invest \$2.5 million) in order to be considered for nomination by Dallas County.
- **Tax Abatement:** Under Texas Local Government Code Chapter 381, counties may offer tax abatement for a period of ten years for projects meeting certain criteria. Dallas County may offer tax abatements for economically significant, Fortune 1000 corporate HQ, strategic investment, facility expansion/modernization and new construction/relocation projects meeting job creation, payroll, and tax base requirements.
- **Tax Increment Financing (TIF):** Chapter 311 of Texas Tax Code authorizes counties to create or participate in TIF districts. Dallas County only uses TIF if it will substantially increase the level, type and rate of development within a non-distressed area, produce a project with regional economic implications or create affordable/moderately-priced single-family housing.



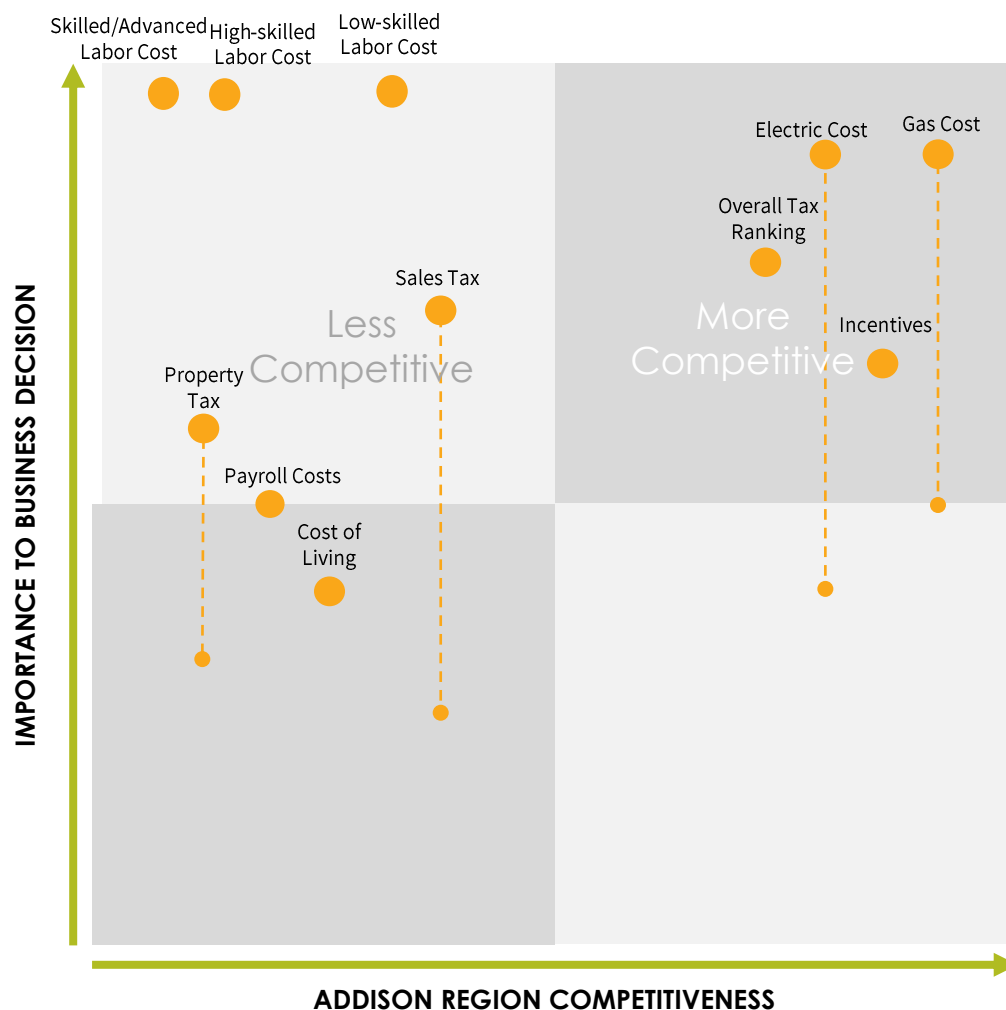
# Core Economic Assets and Business Environment

## GENERAL BUSINESS COSTS ASSET MAP COMMENTS

The asset map to the right depicts Town of Addison region's competitiveness compared to the state of Texas, surrounding states, as well as the United States as a whole.

- Labor costs in the Town of Addison are higher than average for all professional labor areas compared to the state of Texas and the U.S. average.
- Texas has the highest overall tax ranking of the surrounding states of 13<sup>th</sup> in the nation. It also has the highest individual income tax rank of 6<sup>th</sup> in the nation. However, Texas has the second highest sales tax (6.25%) of the surrounding states, and while there is no corporate income tax, the margin tax applied to corporate revenues and expenses is among the worst for businesses in the nation (ranked 49<sup>th</sup>).
- Texas is ranked 6<sup>th</sup> in the nation in terms of high property taxes at 1.9%. Oklahoma is ranked 29<sup>th</sup> (0.86%), Arkansas is 42<sup>nd</sup> (0.62%) and Louisiana is 48<sup>th</sup> (0.51%). Property taxes in Texas are used to fund local services, like schools, roads, hospitals and emergency services.
- Industrial gas costs in Texas are lower or competitive compared with all of the surrounding states and the national. Industrial electric costs are lower than the surrounding states, with the exception of Louisiana, as well as the national average.
- The state of Texas has targeted incentive programs in place, supporting product development and innovation and event hosting, as well as enterprise "deal closing" grants that would help Addison be more competitive for these types of industries.
- The cost of living in Texas is 10% lower than the national average, but the cost of living in the Town of Addison is 25% higher than the national average. The cost of living in Addison is higher than all the comparison MSAs by at least 17%.
- Payroll costs are based on unemployment and workers compensation insurance rates, of which Texas has the second highest among comparison states, second to Louisiana.

## GENERAL BUSINESS COSTS ASSET MAP



Note: Dotted lines down represent the variability of each factor depending on the industry.

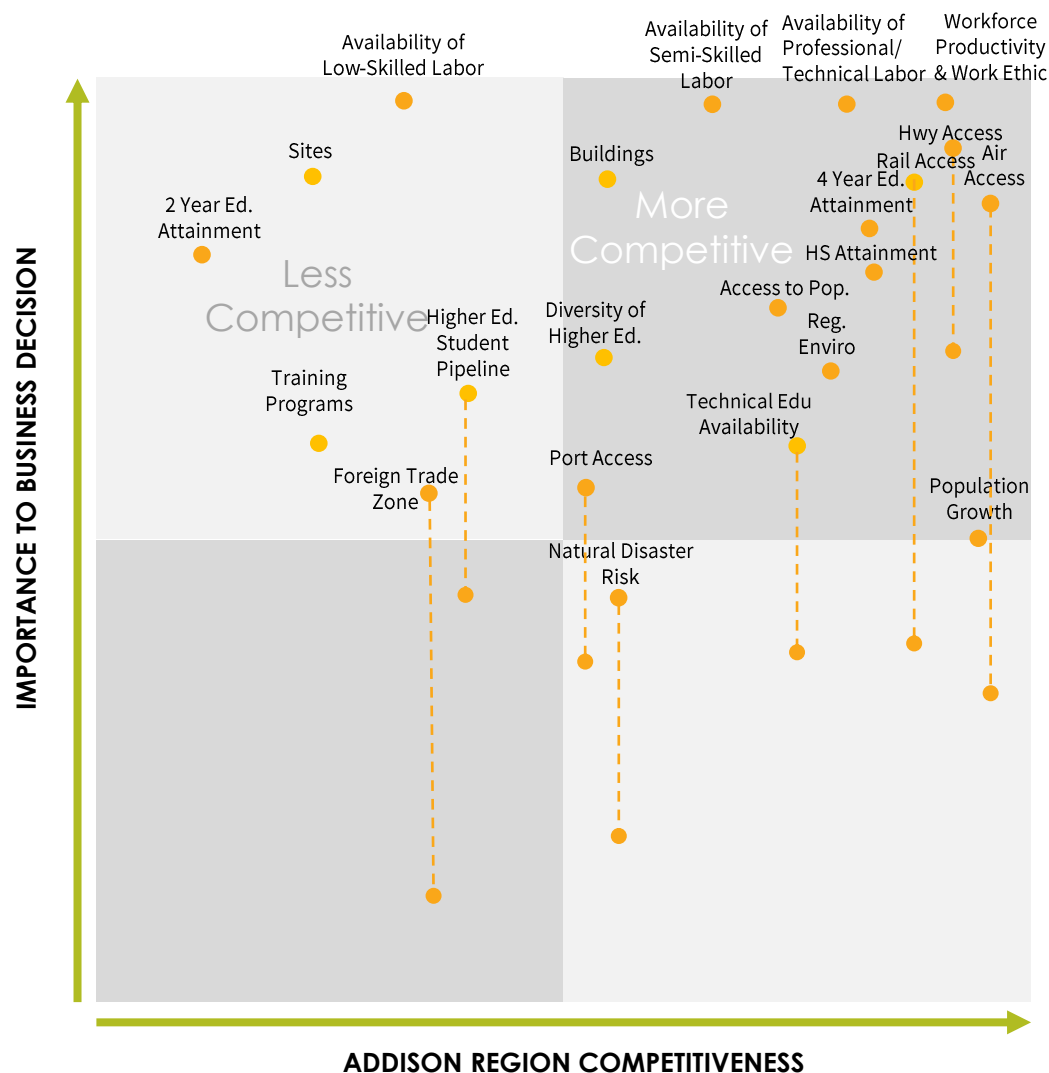
# Core Economic Assets and Business Environment

## GENERAL BUSINESS CONDITIONS ASSET MAP COMMENTS

The asset map to the right depicts the Town of Addison region's competitiveness compared to the state of Texas, surrounding states, as well as the United States as a whole.

- The population of Dallas County has grown 38% since 1990, with 5% of that growth occurring in the last five year period. The Town of Addison has experienced 16.9% population growth over the past five years. Texas has experienced the strongest population growth of the surrounding states at 8.5%, also exceeding the national average of 3.68%.
- Dallas County has also experienced extremely strong labor force growth over the past 5-year period, increasing by 11.3%. The Town of Addison has seen 29.9% growth over the last five years. Of the surrounding states, Texas had the second strongest labor force growth, at 1.51%.
- Availability of labor was noted to be a challenge among employers, except low-skilled labor. Hospitality industry employers noted difficulty in recruiting for some positions, and noted difficulty for their workers to find affordable housing in Addison. Other industries noted general difficulties finding employees with soft skills to fill customer-facing positions like business development and sales, as well as leadership and project management.
- Addison has access to 76 colleges and universities offering 2-year and 4-year degrees within 50 miles. Employers noted having a relationships with the University of North Texas in Denton, which provides 4-year and graduate degrees and job fairs to aid recruitment.
- Work ethic was cited by employers to be very high, an average of 4.25 on a scale of 1 to 5.
- Addison's average educational attainment rates are higher than that of the State of Texas, the surrounding states, comparison MSA's and the national average in all areas except 2-years degrees, where it is below the average relative to all of those same regions.
- The business climate in the state of Texas is very favorable, and Texas ranks 2<sup>nd</sup> on "Forbes Best States for Business". As part of this overall ranking, Forbes ranks Texas 1<sup>st</sup> for Economic Climate, 2<sup>nd</sup> for Growth Prospects, 3<sup>rd</sup> for Business Costs, and 9<sup>th</sup> for Labor Supply.
- Within a 500-mile radius, companies can access over 15% of the U.S. population. Addison is located on the North Dallas Tollway, and proximal to interstates 635, 35 and 75 in the Dallas region.
- Texas is ranked 1<sup>st</sup> in the US in natural disaster risk, but the risk is greater along the coast and outside the Dallas metro area.

## GENERAL CONDITIONS ASSET MAP

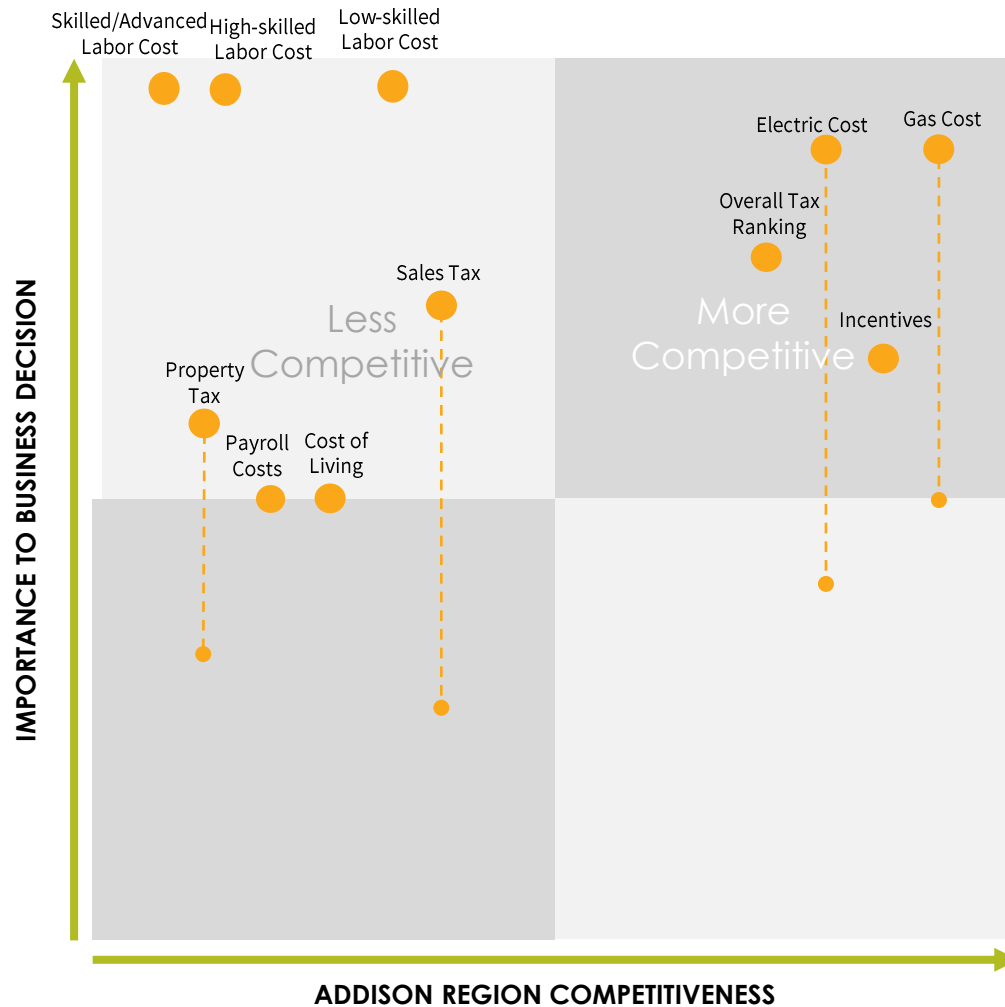


Note: Dotted lines down represent the variability of each factor depending on the industry.

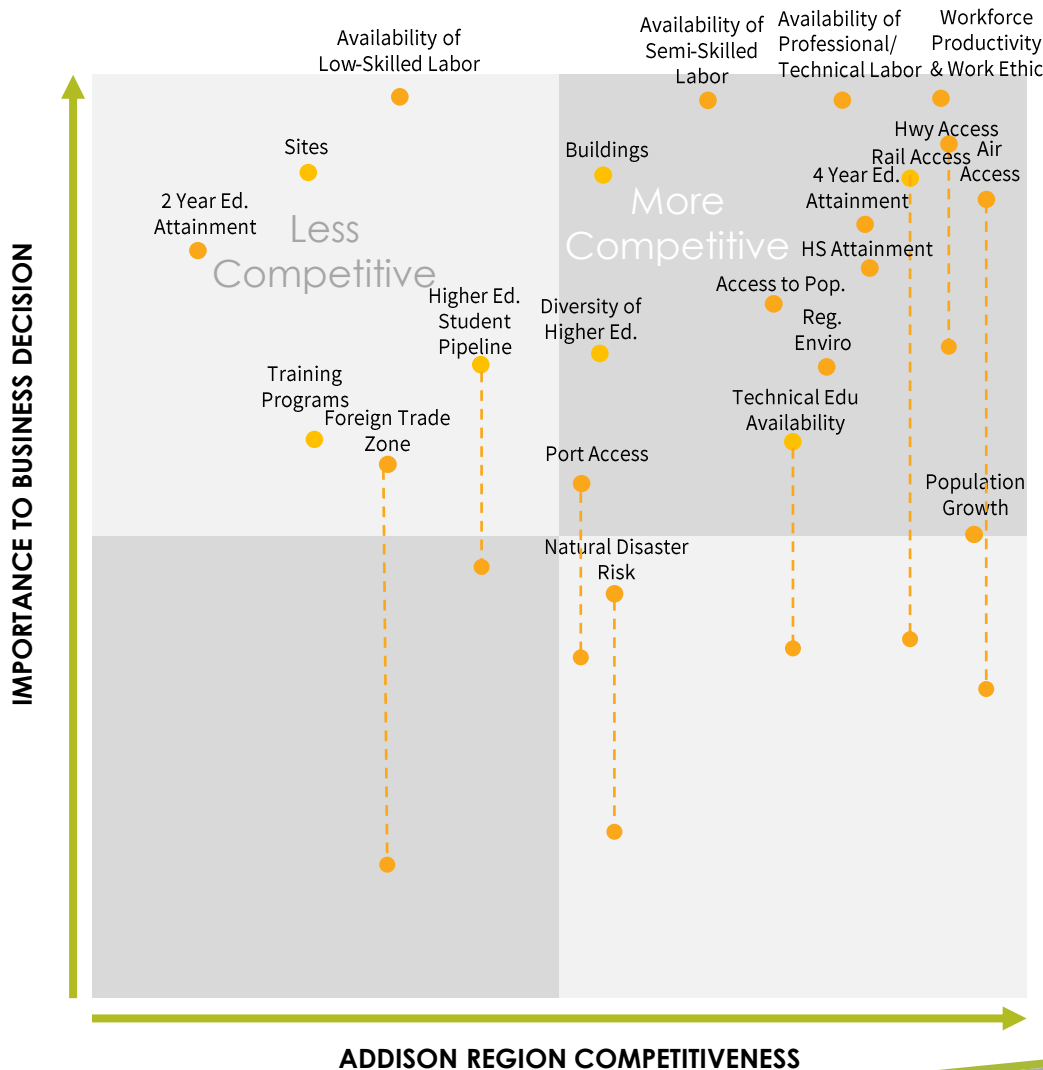
# Regional Positioning Points

# Addison Regional Positioning

## GENERAL BUSINESS COSTS ASSET MAP



## GENERAL CONDITIONS ASSET MAP

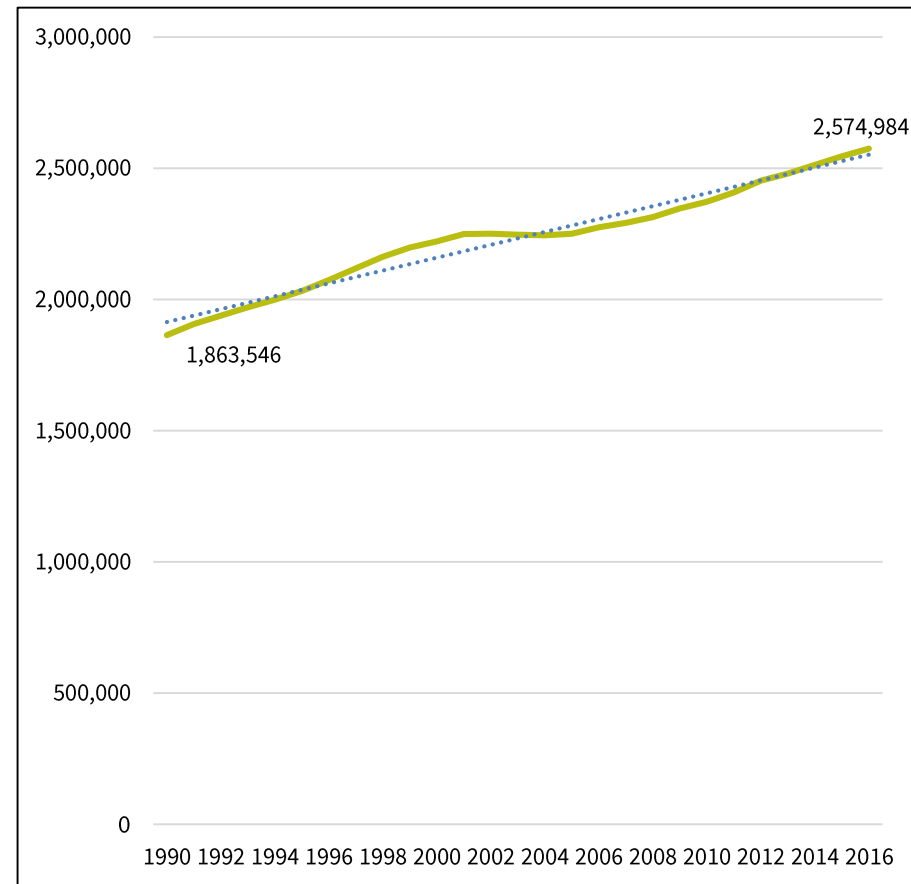


Note: Dotted lines down represent the variability of each factor depending on the industry.

# Addison Regional Positioning

Addison, Texas offers the following competitive advantages for businesses:

- **Strong business climate in Texas and Dallas-Fort Worth Metro Area**
  - **Texas Rankings**
    - #1 Best State for Business (Chief Executive Magazine, 2018)
    - #1 Best State for Economic Climate (Forbes, 2017)
    - #1 Best State for Business Climate (Business Facilities Magazine, 2017)
    - #1 State for Workforce (CNBC America's Top States for Business 2018)
    - #1 State for Infrastructure (CNBC America's Top States for Business 2018)
    - #1 State for Job Growth for Past Five Years (US Chamber Foundation, Enterprising States 2017)
    - #2 Best State for Business (Forbes, 2017)
    - #2 Best State for Growth Prospects (Forbes, 2017)
    - #3 Best State for Business Costs (Forbes, 2017)
    - #4 Best State Rank (CNBC America's Top States for Business, 2018)
    - #4 Best State for Innovation (CompTIA, 2017)
    - #6 Best State for Tech Job Creation in the Past Five Years (CompTIA, 2017)
    - #8 Best State Economy (U.S. News & World Report, 2018)
  - **Dallas-Fort Worth Rankings**
    - Dallas metro area has experienced employment growth second only to New York City since 2016, with more than 109,400 people (3.0%) from 2017 to 2018.
    - #1 Metro Area for Talent Attraction (EMSI, 2017)
    - #2 Top Metros of 2016 (Site Selection Magazine, 2016)
    - #4 Financially Stable Metro (Goldman Sachs, 2018)
    - #10 Best Places for Businesses and Careers (Forbes, 2017)
    - #10 Cities Where a Paycheck Stretches the Furthest (Forbes, 2017)



Growth of Dallas County since 1990. Source: U.S. Census Bureau, 2017



# Addison Regional Positioning

Addison, Texas offers the following competitive advantages for businesses:

- **Array of Business Incentives Available at the State and Local Level**

**Texas Incentives**

- **Texas Enterprise Fund (TEF):** Awards “deal-closing” grants to companies considering a new project for which one Texas site is competing with other out-of-state sites.
- **Event Trust Funds:** Comprised of three separate funds—the Events Trust Fund, Major Events Reimbursement Program, and Motor Sports Racing Trust Fund—targeted at attracting various types of events to the State of Texas.
- **Product Development and Small Business Incubator Fund:** Offers long-term, asset-backed loans to near-bankable businesses commercializing new or improved products and small businesses or entities which foster growth of small businesses.
- **Capital Access Program (CAP):** Partnership between the State of Texas and selected non-profit lenders to increase access to financing for small and medium-sized businesses and non-profits which face barriers to accessing capital or fall outside of guidelines of conventional lending.
- **Jobs 4 Texas (J4T):** An innovative program designed to increase small businesses' access to capital and enable private entrepreneurs to make market-driven decisions to grow jobs.
- **BCL of Texas:** Promotes business and community development and provides business capital and commercial real estate loans throughout Texas.
- **LiftFund:** Provides credit and service to small businesses that do not have access to loans from commercial sources, and to provide leadership and service to the micro-lending field on a national level.
- **Skills Development Fund:** Texas' premier job-training program providing local customized training opportunities for Texas businesses and workers to increase skill levels and wages of the Texas workforce.

**Addison Incentives**

- Fast track permitting
- Site selection assistance
- Chapter 380 Grants
- Employment recruitment assistance

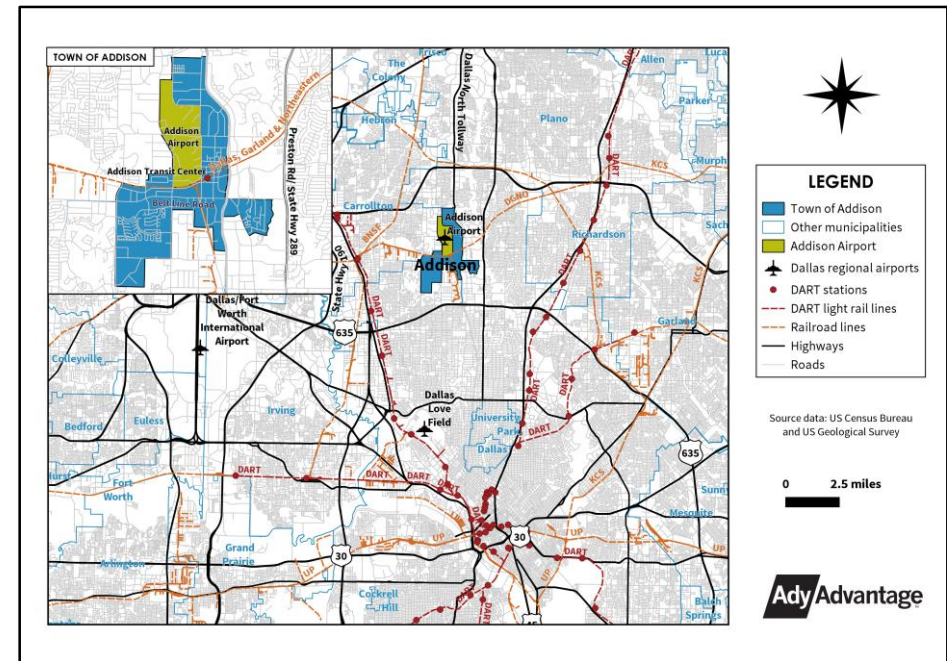


# Addison Regional Positioning

Addison, Texas offers the following competitive advantages for businesses:

- **Transportation Infrastructure**

- **Highways:** Addison is well connected regionally, located on the North Dallas Tollway about 15 miles from downtown Dallas. Nearby interstate access expanding access across the US includes I-635, which circles Dallas; I-35, which extends from Kansas in the north to the Mexican border in the south; and I-75, which extends from the Canadian border in the north to Dallas in the south. State highway 289 to the east extends from downtown Dallas to Lake Texoma on the Oklahoma-Texas border.
- Within 500 miles of the Town of Addison, companies are able to reach over 49 million people, 15.5% of the total US Population.
- **Rail:** The Dallas, Garland and Northeastern Railroad (DGNO) runs through Addison from east to west, with a spur line to the south in the Inwood area. This line will be the home of the new Dallas Area Rapid Transit (DART) regional rail station called Addison Transit Center. Three class I railroads can be accessed in the Dallas-Fort Worth metro area: Burlington Northern Santa Fe (BNSF), Kansas City Southern (KCS), and Union Pacific (UP). UP operates the Dallas Intermodal Terminal southeast of the downtown area.
- **Air:** The Town of Addison owns a public airport, with a 7,200 foot runway and rental hangars serving many corporate clients. Located twenty miles away, the Dallas-Fort Worth International Airport, fourth busiest airport in the world, offers non-stop flights to 57 international airports and 176 other destinations across the US. Regional Airport, Dallas Love Field, located 12 miles away from Addison, has three runways and serves as the corporate headquarters of Southwest Airlines.
- **Port:** Located more than 250 miles from the nearest seaport, the Town of Addison has limited access to sea transport. The Addison Airport is one of the 29 custom ports of entry in the state of Texas, while Dallas/Fort Worth International Airport hosts the largest regional intermodal facility, followed by the Fort Worth Alliance.



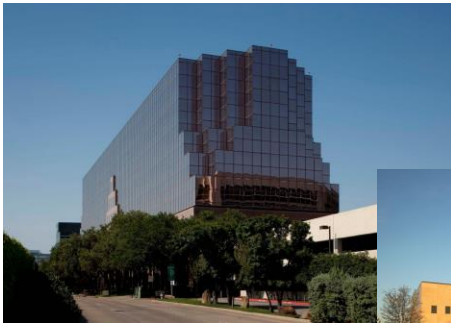
Mapped by Ady Advantage, 2018

# Addison Regional Positioning

Addison, Texas offers the following competitive advantages for businesses:

- **Addison Real Estate**

- **Building availability:** 11 million square feet of office space available in Addison with an average lease rate of \$24.52/SF; 2 million square feet of retail space at an average of \$19.39/SF; and 2.6 million square feet of industrial space at an average of \$7.12/SF.
- The Addison Airport also has hangar space available.



# Addison Regional Positioning

## Addison, Texas offers the following competitive advantages for businesses:

- **Recognition of the region as a knowledge capital of the world**

- In a study conducted by the Brookings Institute, among 19 mid-sized population centers, Dallas metro area ranked 2<sup>nd</sup> in terms of population, 3<sup>rd</sup> in nominal GDP in 2015, 5<sup>th</sup> in annual average real GDP growth from 2000 to 2015, and 6<sup>th</sup> in annual average real GDP growth per worker from 2000 to 2015. These Knowledge Capitals of the world are highly productive innovation centers located in the US and Europe and characterized by having high concentrations of talent and elite research universities.

- **Access to a skilled regional workforce** – With its centralized location within the Dallas-Fort Worth Metro area, companies in Addison can pull talent from all directions.

- **4-year degree talent pipeline in the surrounding region**

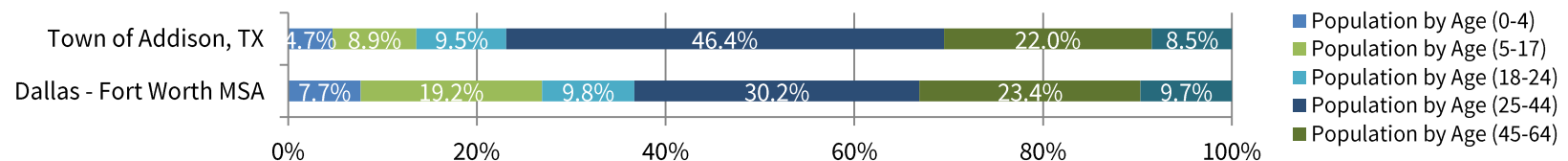
- **Universities based out of Dallas metro area. Some prominent ones include:**

- **The University of Texas - Arlington:** 46,000 student enrollment, over 33,000 undergraduates and 13,000 postgraduates
- **University of North Dallas – Denton:** 38,000 student enrollment, over 31,000 undergraduates and almost 7,000 postgraduates
- **The University of Texas - Dallas:** 27,000 student enrollment, over 18,000 undergraduates and 9,000 postgraduates
- **Richland College:** 18,000 student enrollment
- **Brookhaven College:** 13,000 student enrollment
- **North Lake College:** 11,000 student enrollment

- The Addison region has higher 4-year degree and graduate educational attainment than the US average and all of the surrounding states.

Educational Attainment	Town of Addison, TX	TX	OK	AR	LA	United States
4-Year Degree	56.1%	27.1%	23.8%	20.6%	22.1%	29.3%
Graduate Degree	18.7%	9.2%	7.9%	7.1%	7.4%	11.1%

Source: U.S. Census Bureau, 2016





# Addison Regional Positioning

Addison, Texas offers the following competitive advantages for businesses:

- **Quality of life**

- **Central location:** Proximity to Dallas downtown (20 minutes), as well as Irving (20 minutes), Arlington (30 miles) and Fort Worth (40 miles).
- **Local amenities and attractions:**
  - More than 180 restaurants within 4 square miles, all less than a 5-minute drive from anywhere in town.
  - More than 200 stores in the Town.
  - Village on the Parkway entertainment district, featuring retail, dining, and entertainment.
  - Events almost monthly, including Addison's Big Three Events - Taste of Addison, Kaboom Town, and Oktoberfest.
  - Athletic Club with about 3,500 members. Facilities include swimming pools, a gymnasium, a indoor track, tennis and racquetball courts, and other fitness amenities.
- **New DART Station:** The Dallas, Garland and Northeastern Railroad (DGNO) runs through Addison from east to west, with a spur line to the south in the Inwood area. This line will be the home of the new Dallas Area Rapid Transit (DART) regional rail station called Addison Transit Center. The DART stop will be in the southwest corner of Addison Circle.
- **Housing:** Addison's housing make-up is 83.9 percent multi-family housing, and it has several unique neighborhoods, such as Addison Circle and Vitruvian.



Source: Addison Magazine and Town of Addison Website



Source: AddisonKaboomTown.com



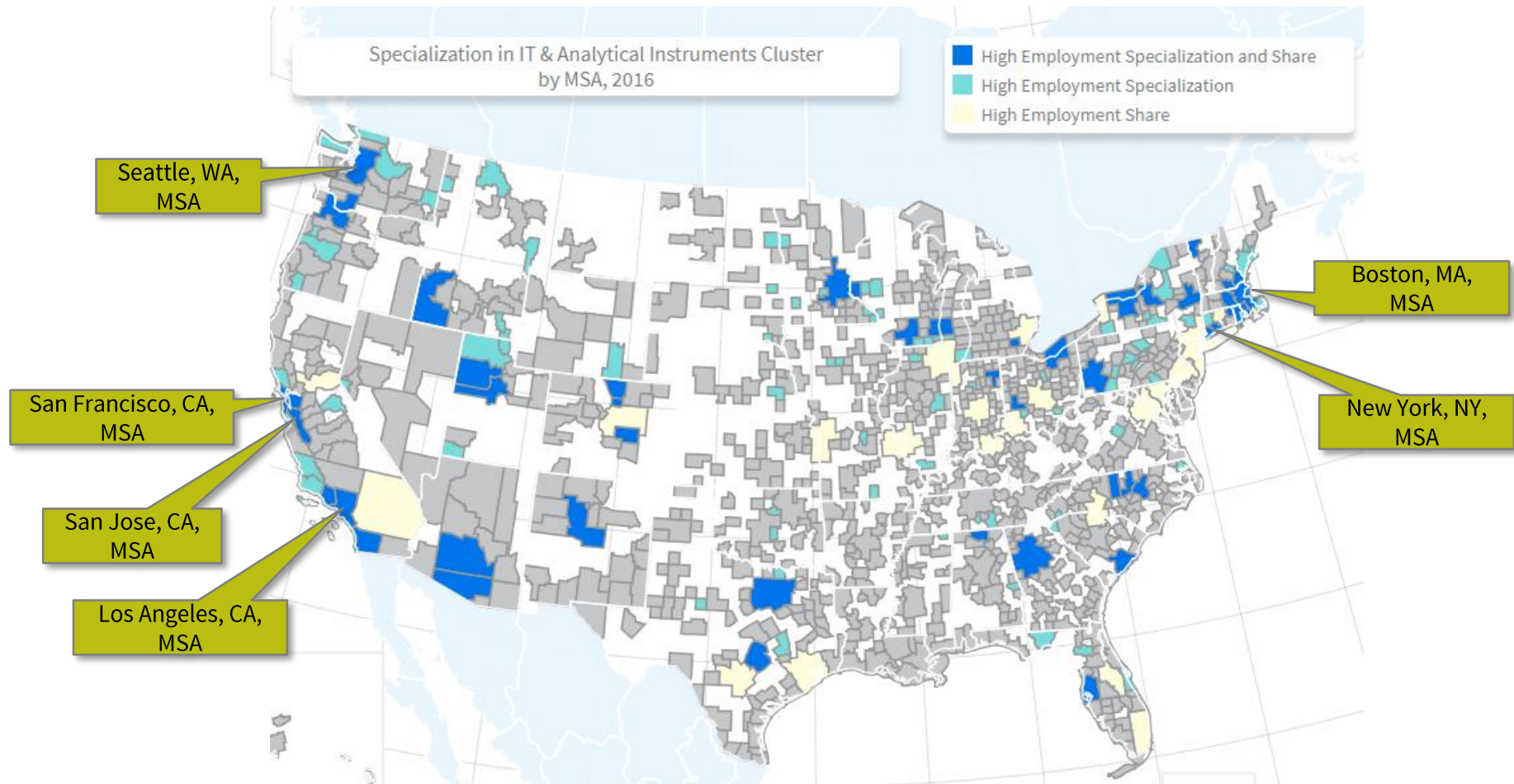
Source: Tour Texas

# Information Technology Positioning

# Addison Region – Information Technology Positioning

## Likely Competitors for Addison

- High employment and patent growth among US metro areas

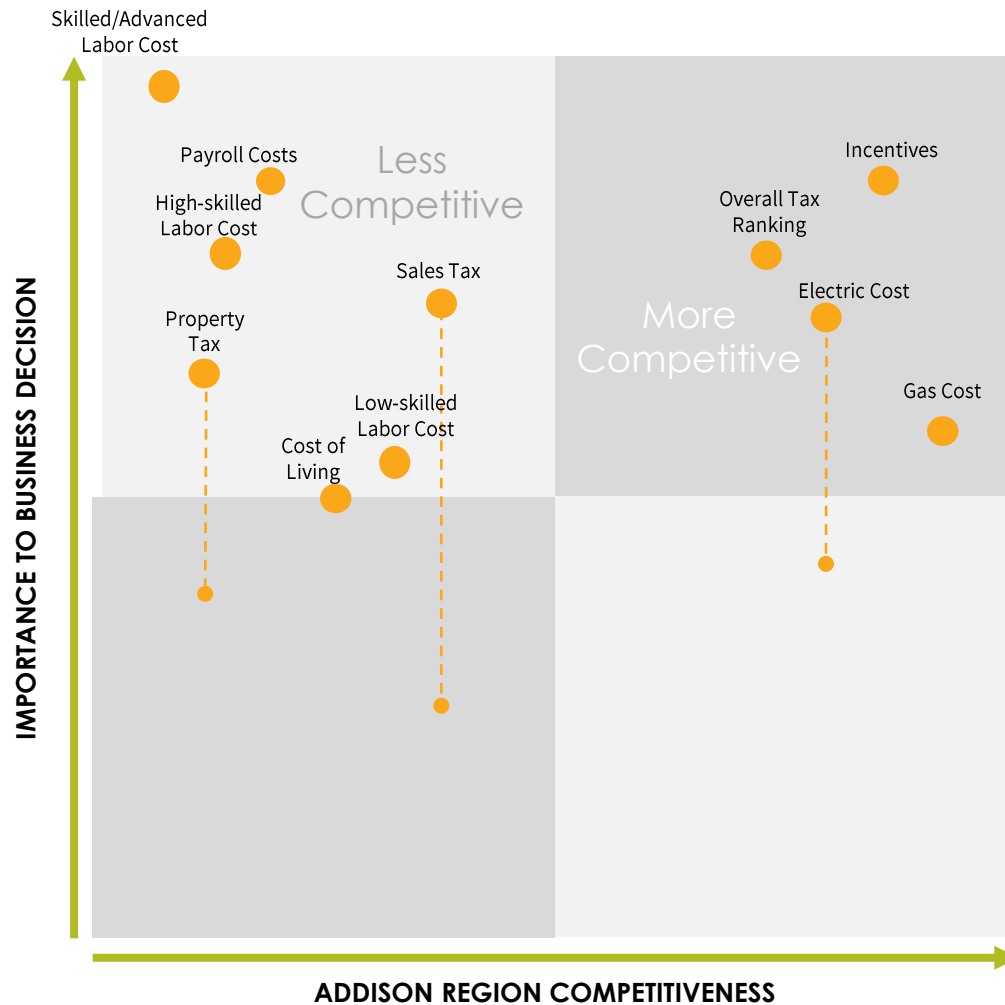


Source: U.S. Cluster Mapping Project, Institute for Strategy and Competitiveness, Harvard Business School

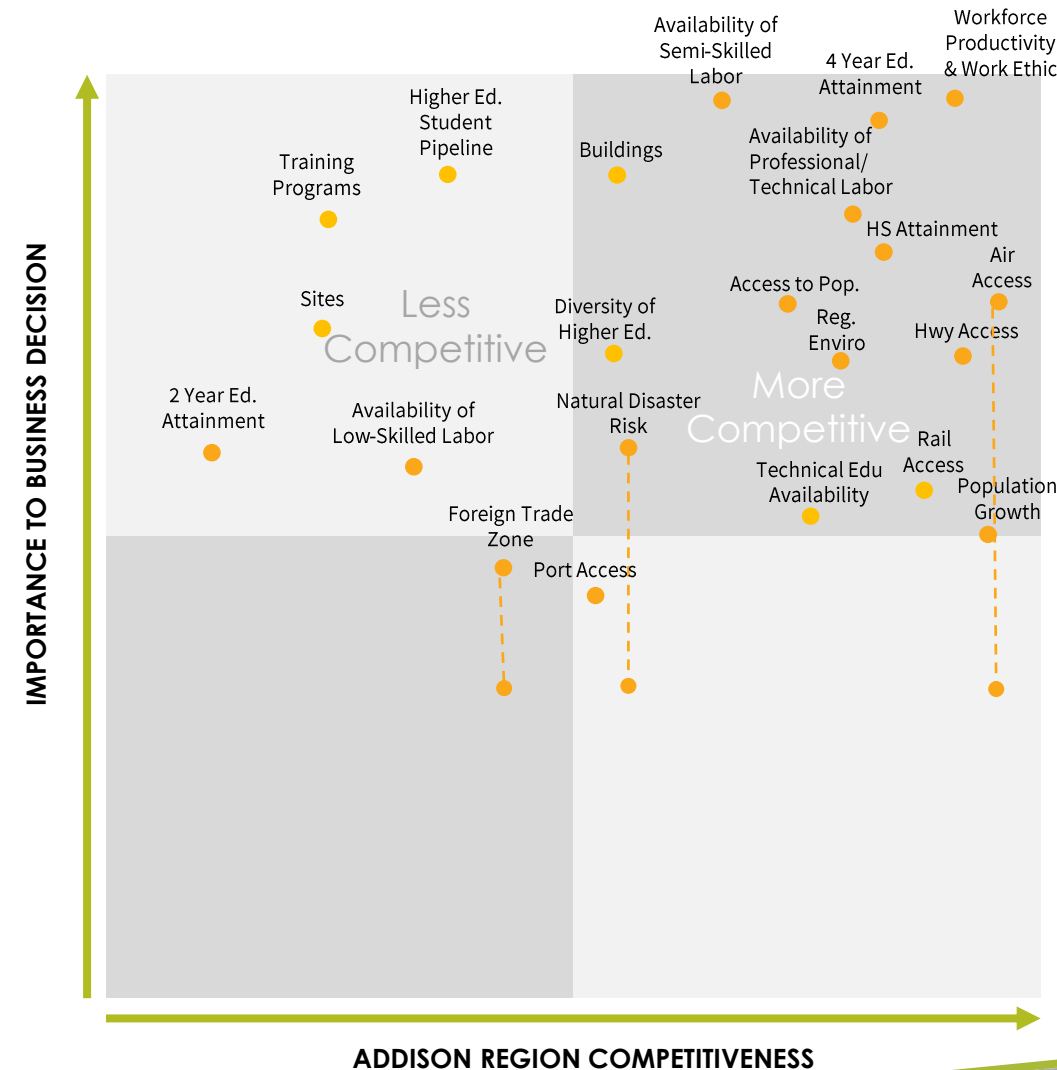


# Addison Region – Information Technology Positioning

## GENERAL BUSINESS COSTS ASSET MAP



## GENERAL CONDITIONS ASSET MAP

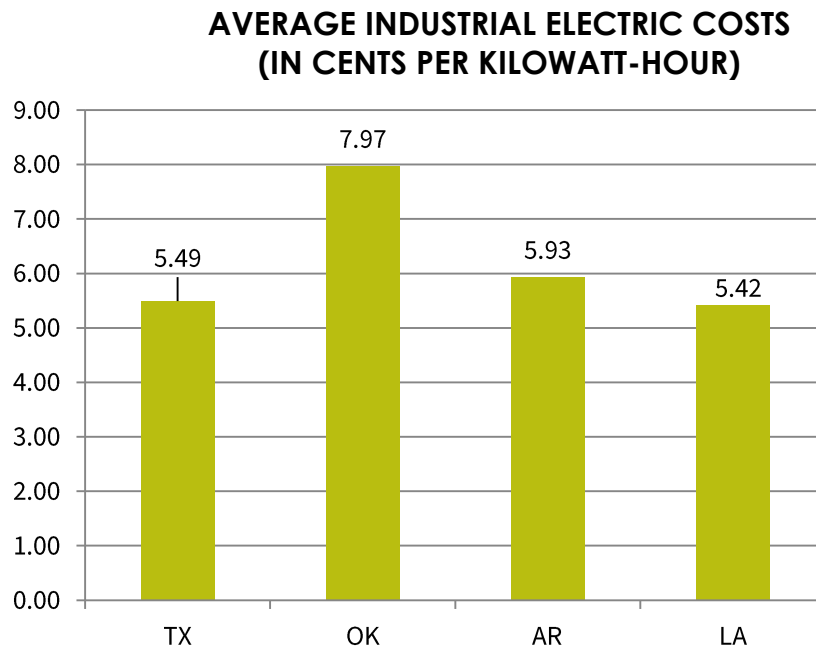


Note: Dotted lines down represent the variability of each factor depending on the industry sector.

# Addison Region – Information Technology Positioning

Addison's location within Texas offers the following competitive advantages for the information technology industry:

- **Competitive electric costs compared to neighboring states**



Source: U.S. Energy Information Administration, 2018

- **Competitive incentives for information technology sector businesses**

- **Texas Enterprise Fund** offers assistance when web businesses seek expansion opportunities. Projects must demonstrate maximum benefit to the state and realize significant rate of return of dollars used.
- **Product Development & Small Business Incubator Fund** is a revolving loan program with the primary objective of aiding development, production, and commercialization of new or improved products and to foster and stimulate small businesses in the state.

# Addison Region – Information Technology Positioning

Addison's location within the Dallas-Fort Worth region offers the following competitive advantages for the information technology industry:

- Existing regional information technology industry companies include:



NTT DATA



intuit

- Existing local information technology industry companies include:



HBR TECHNOLOGIES®

projekt202

Google

SAGE®

bottle rocket

# Addison Region – Information Technology Positioning

Addison's location within the Dallas-Fort Worth region offers the following competitive advantages for the information technology industry:

- **Access to a skilled regional workforce**
  - **Four-year degree talent pipeline in the surrounding region**
    - **The University of Texas at Dallas:** Located in Richardson, offers relevant degree programs in the fields listed in the table to the right.
    - **University of North Texas:** Located in Denton, offers certificates to doctorate level programs in the computer science fields listed in the table to the right.
    - **Strayer University:** With several regional locations including North Dallas, offers distance education programs from certificate to masters level in Computer and Information Systems Security, Computer Support Specialist, Information Science and Information Technology.
    - **DeVry University:** Located in Irving, offers degree programs from certificates up to masters level in Computer Software Engineering, Computer Systems Analysis, and Computer Systems Networking.

Relevant Degree Programs (2016-2017)	Bachelor	Master
<b>The University of Texas at Dallas</b>		
Computer and Information Sciences, General	219	461
Information Science	-	574
Information Technology	114	-
Computer Engineering, General	55	44
Computer Software Engineering	62	40
Electrical and Electronics Engineering	119	201
<b>University of North Texas</b>		
Computer and Information Sciences, General	101	54
Information Science	25 <sup>d</sup>	64 <sup>d</sup>
Information Technology	23	-

Source: National Center for Education Statistics, 2017



# Addison Region – Information Technology Positioning

The Town of Addison offers the following competitive advantages for businesses:

- **Addison has an abundance of talent and competitive wages for the Information Technology industry**

OCCUPATION	CONCENTRATION				
	ADDISON	GREATER REGION	CHICAGO MSA	KANSAS CITY MSA	AUSTIN MSA
Computer Systems Analysts (SOC 15-1121)	2.9	1.6	1.2	1.6	2.5
Software Developers, Applications (SOC 15-1132)	2.4	1.3	1.0	1.3	2.3
Computer Programmers (SOC 15-1131)	2.4	1.3	1.4	1.5	2.0
Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products (SOC 41-4011)	2.3	1.3	0.7	0.7	4.5
Computer User Support Specialists (SOC 15-1151)	2.3	1.4	1.2	1.6	1.8

Source: JobsEQ, 2018 - Dallas County Community College District

OCCUPATION	WAGES				
	ADDISON	GREATER REGION	CHICAGO MSA	KANSAS CITY MSA	AUSTIN MSA
Computer Systems Analysts (SOC 15-1121)	\$97,200	\$95,200	\$90,550	\$84,710	\$92,960
Software Developers, Applications (SOC 15-1132)	\$109,900	\$107,800	\$96,660	\$90,330	\$105,430
Computer Programmers (SOC 15-1131)	\$91,400	\$89,500	\$92,380	\$79,490	\$90,190
Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products (SOC 41-4011)	\$89,600	\$87,500	\$77,510	\$88,910	\$120,950
Computer User Support Specialists (SOC 15-1151)	\$54,800	\$53,600	\$55,280	\$48,220	\$50,510

Source: JobsEQ, 2018 - Dallas County Community College District

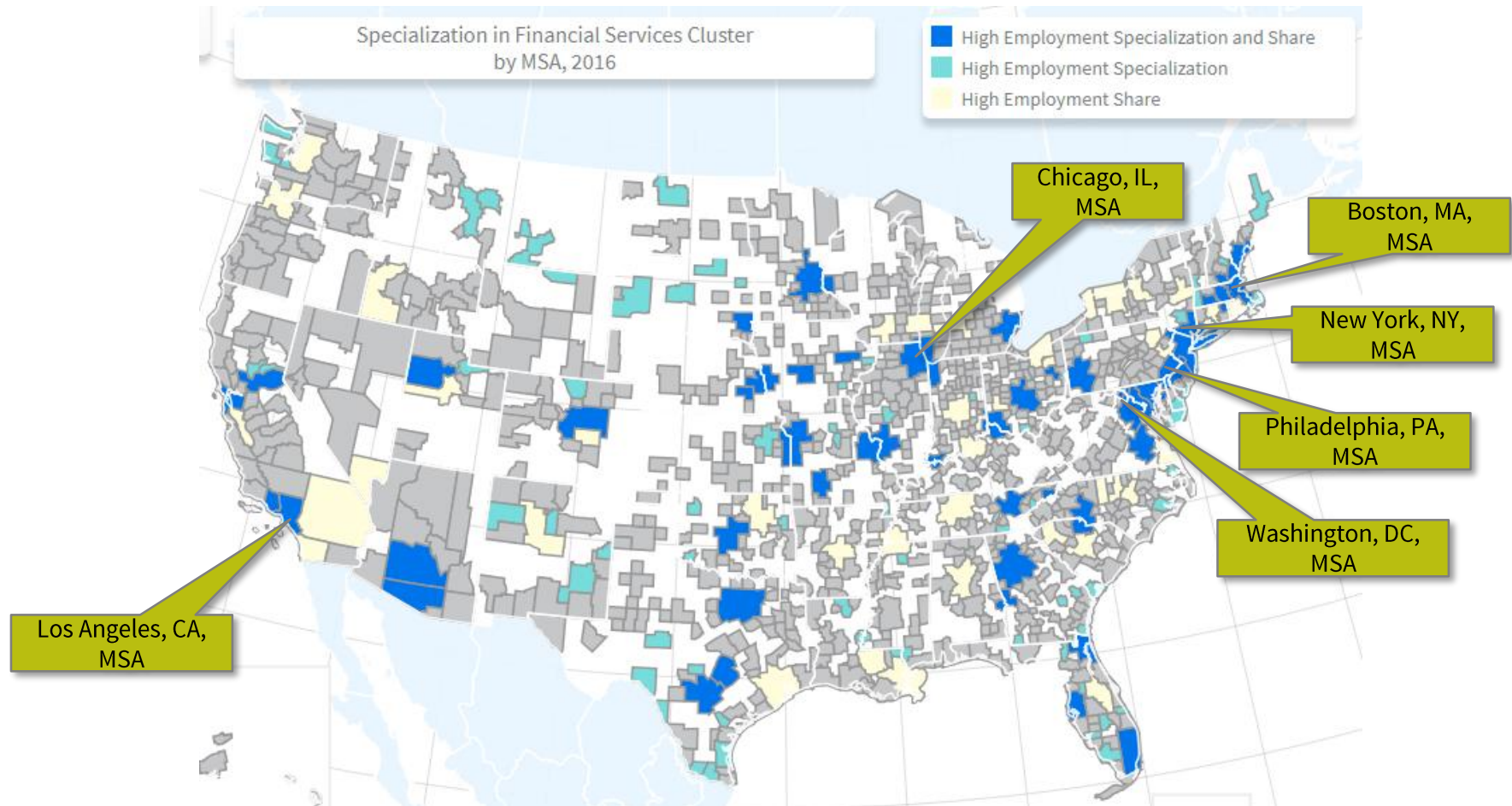
# Specialized Financial Services Positioning



# Addison Region – Specialized Financial Services Positioning

## Likely Competitors for Addison

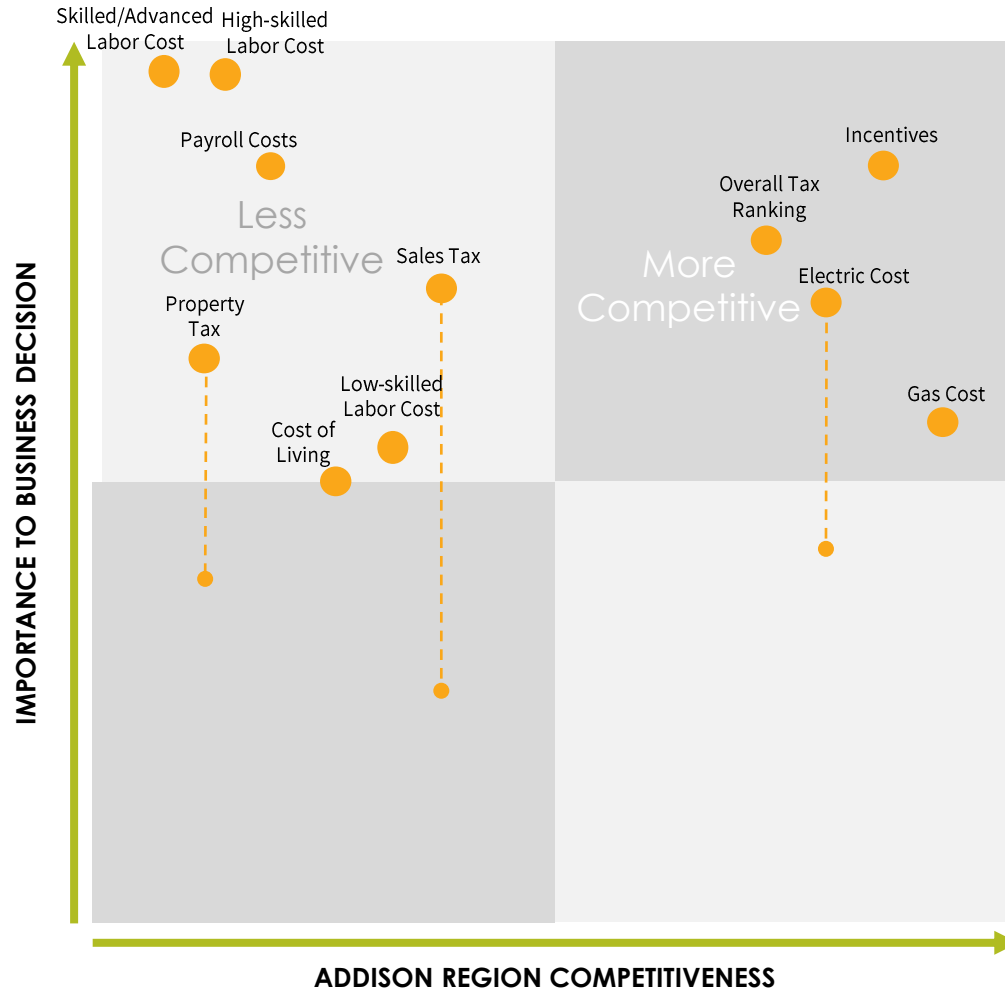
- High employment growth and number of establishments among US metro areas



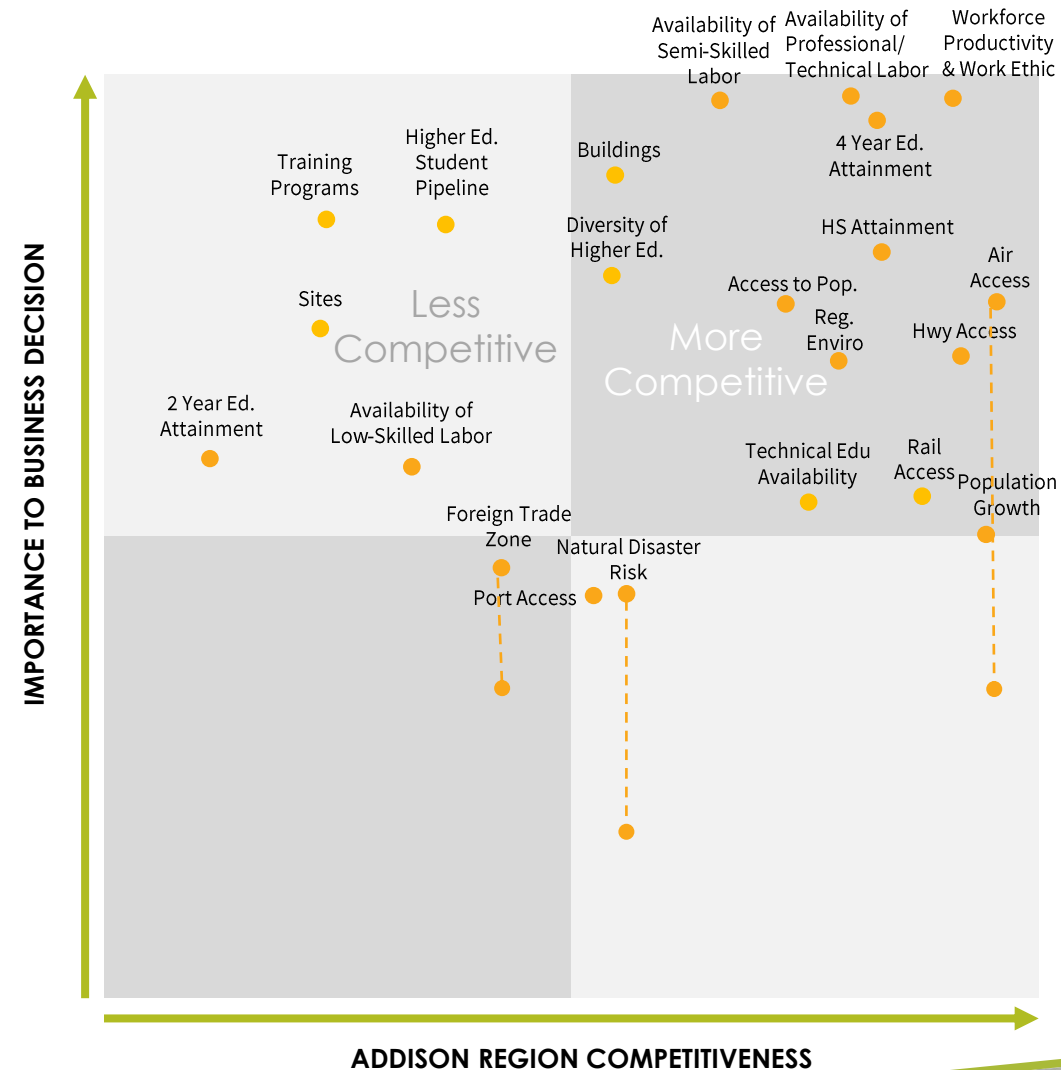
Source: U.S. Cluster Mapping Project, Institute for Strategy and Competitiveness, Harvard Business School

# Addison Region – Specialized Financial Services Positioning

## GENERAL BUSINESS COSTS ASSET MAP



## GENERAL CONDITIONS ASSET MAP



Note: Dotted lines down represent the variability of each factor depending on the industry sector.

# Addison Region – Specialized Financial Services Positioning

Addison's location within the Dallas-Fort Worth region offers the following competitive advantages for the specialized financial services industry:

- Existing local specialized financial services industry companies include:



- Existing regional specialized financial services industry companies include:





# Addison Region – Specialized Financial Services Positioning

Addison's location within the Dallas-Fort Worth region offers the following competitive advantages for the specialized financial services industry:

- **Access to a skilled regional workforce**
  - **Four-year and above degree talent pipeline in the surrounding region**
    - **The University of Texas at Dallas:** Located in Richardson, offers relevant degree programs in the fields listed in the table to the right.
    - **University of North Texas:** Located in Denton, offers certificates to doctorate level programs in the computer science fields listed in the table to the right. In addition, new programs in E-Commerce/Electronic Commerce and Financial Planning and Services are offered.
    - **Strayer University:** With several regional locations including North Dallas, offers distance education programs from certificate to masters level in Accounting and Finance, Business Administration and Management, International Business/Trade/Commerce, and Economics.
    - **DeVry University:** Located in Irving, offers degree programs from certificates up to masters level in Accounting and Finance, Business Administration and Management, Business/Commerce, and Management Information Systems.
    - **University of Dallas:** Located in Irving, offers degree programs from certificates up to doctorate level in Business Administration and Management, Finance and Financial Management Services, International Business/Trade/Commerce, Management Information Systems, and Economics.

Relevant Degree Programs (2016-2017)	Bachelor	Master	Doctor
<b>The University of Texas at Dallas</b>			
Actuarial Science	19	9	-
Business Administration and Management, General	-	337 <sup>d</sup>	-
Business/Commerce, General	215	-	-
Finance, General	173	183	-
Economics, General	46	12	3
<b>University of North Texas</b>			
Business Administration and Management, General	-	127 <sup>d</sup>	0
Business/Commerce, General	50	-	20
Business/Managerial Economics	37	-	-
Finance, General	186	8	1
Insurance	23	-	-
Management Information Systems, General	75	5	0
Economics, General	33	11	-

Source: National Center for Education Statistics, 2017

# Addison Region – Specialized Financial Services Positioning

The Town of Addison offers the following competitive advantages for businesses:

- **Addison has an abundance of talent and competitive wages for the Specialized Financial Services industry**

OCCUPATION	CONCENTRATION				
	ADDISON	GREATER REGION	CHICAGO MSA	KANSAS CITY MSA	AUSTIN MSA
Loan Interviewers and Clerks (SOC 43-4131)	7.9	2.2	0.9	1.5	1.4
Insurance Claims and Policy Processing Clerks (SOC 43-9041)	5.3	2.1	1.0	1.6	1.5
Loan Officers (SOC 13-2072)	5.0	1.5	1.0	1.3	0.6
Bill and Account Collectors (SOC 43-3011)	3.0	1.7	1.1	1.5	1.0
Claims Adjusters, Examiners, and Investigators (SOC 13-1031)	3.0	1.3	1.2	1.7	1.0

Source: JobsEQ, 2018 - Dallas County Community College District

OCCUPATION	WAGES				
	ADDISON	GREATER REGION	CHICAGO MSA	KANSAS CITY MSA	AUSTIN MSA
Loan Interviewers and Clerks (SOC 43-4131)	\$49,200	\$48,000	\$44,990	\$40,670	\$46,350
Insurance Claims and Policy Processing Clerks (SOC 43-9041)	\$41,600	\$40,900	\$44,520	\$37,990	\$43,340
Loan Officers (SOC 13-2072)	\$83,700	\$81,500	\$89,510	\$88,280	\$89,390
Bill and Account Collectors (SOC 43-3011)	\$43,400	\$42,200	\$36,940	\$34,030	\$39,430
Claims Adjusters, Examiners, and Investigators (SOC 13-1031)	\$73,600	\$72,400	\$66,840	\$69,860	\$57,980

Source: JobsEQ, 2018 - Dallas County Community College District

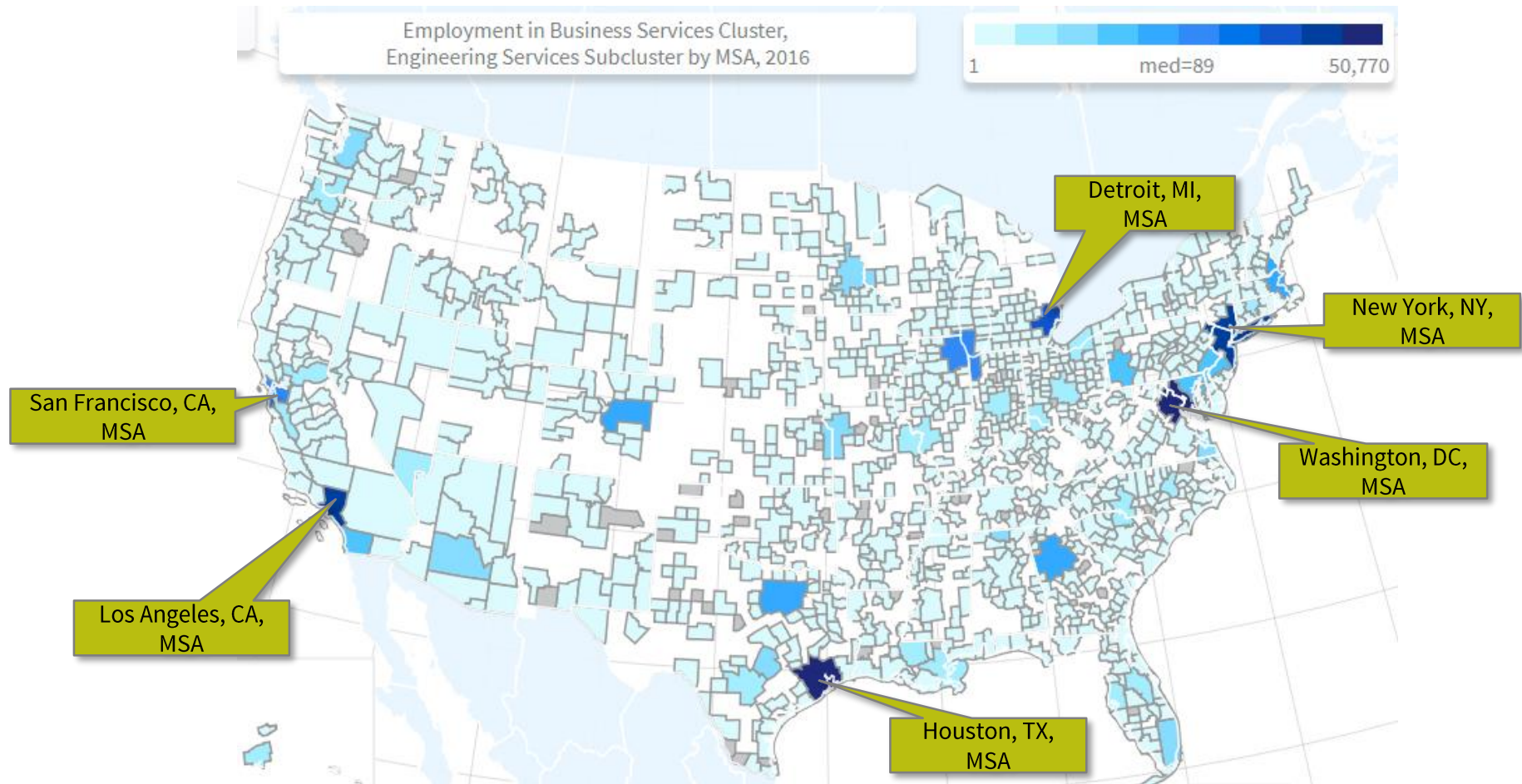
# Engineering and R&D Services Positioning



# Addison Region – Engineering and R&D Services Positioning

## Likely Competitors for Addison

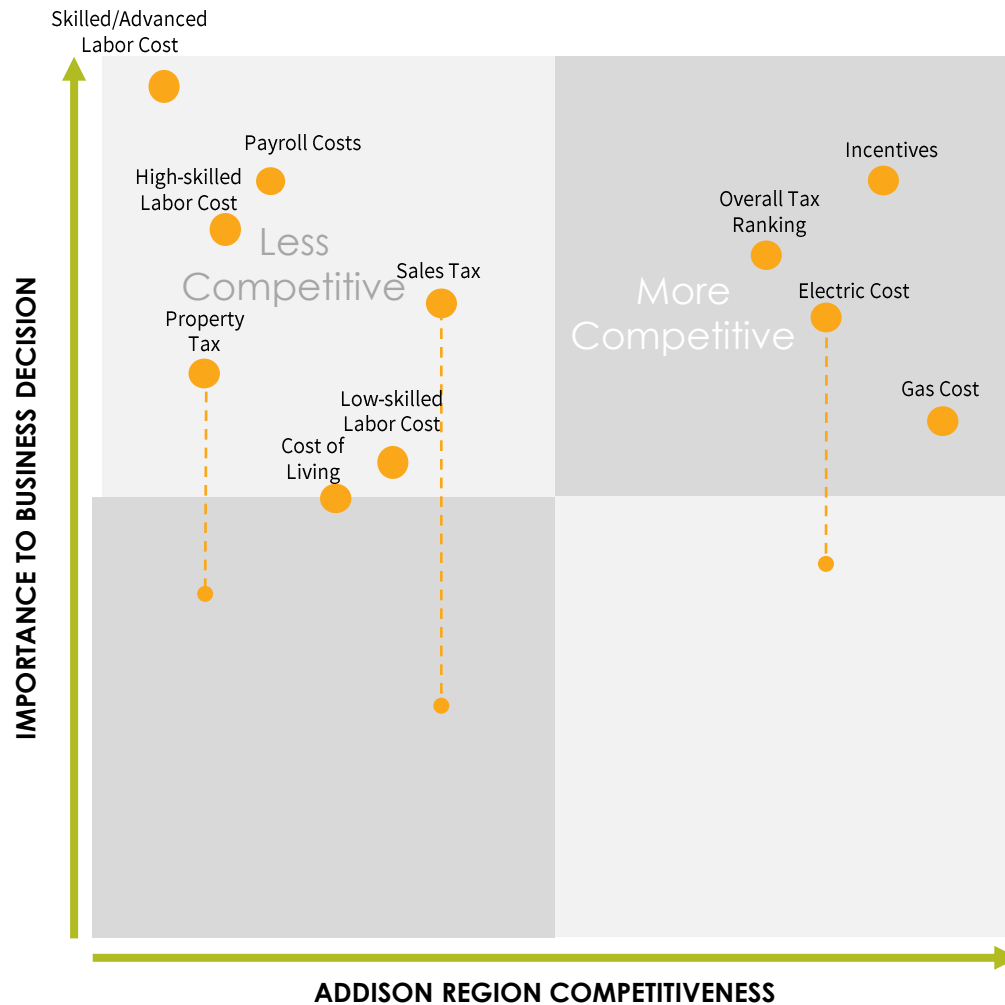
- High employment among US metro areas



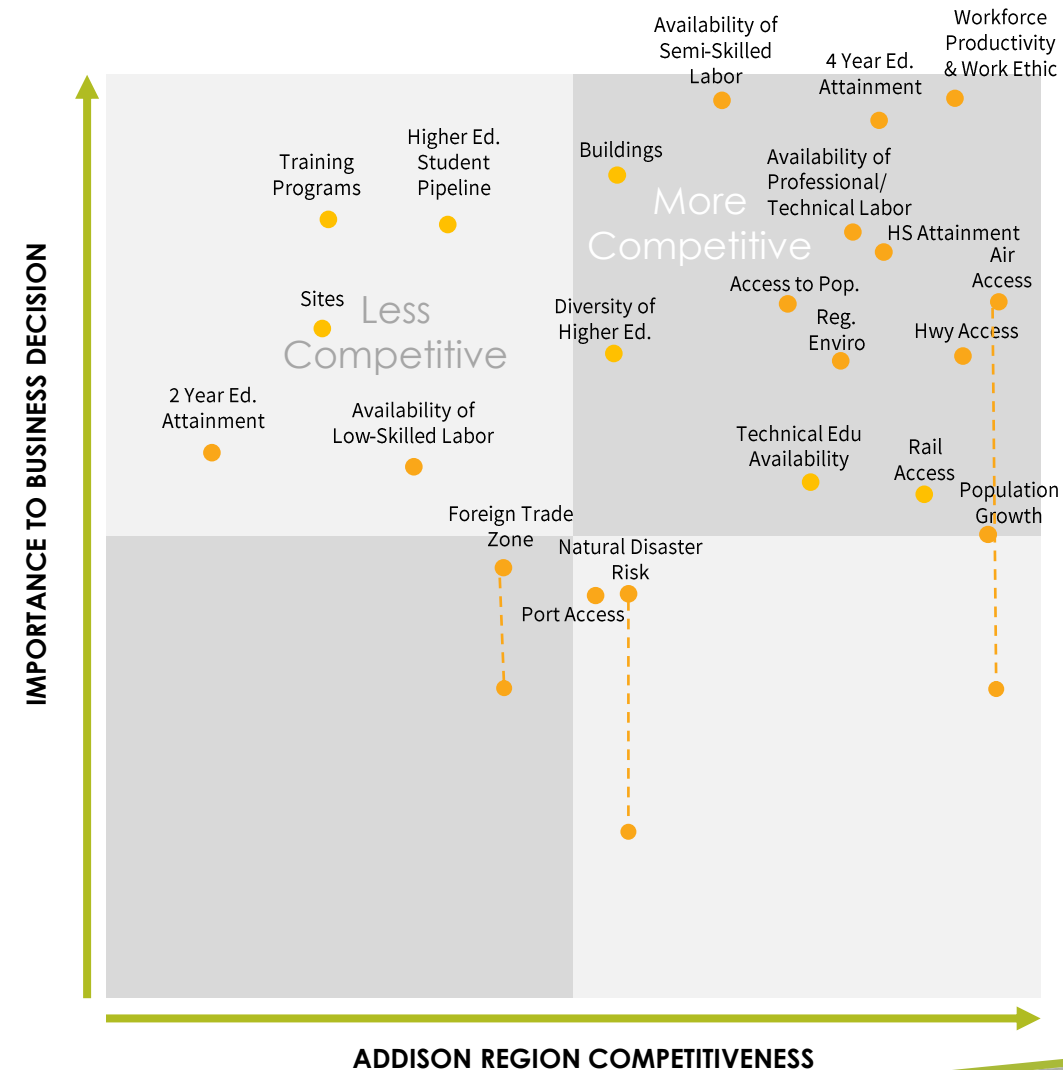
Source: U.S. Cluster Mapping Project, Institute for Strategy and Competitiveness, Harvard Business School

# Addison Region – Engineering and R&D Services Positioning

## GENERAL BUSINESS COSTS ASSET MAP



## GENERAL CONDITIONS ASSET MAP



Note: Dotted lines down represent the variability of each factor depending on the industry sector.

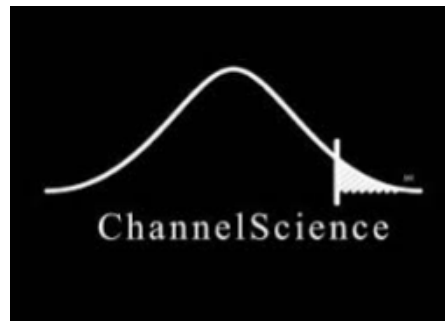
# Addison Region – Engineering and R&D Services Positioning

Addison's location within the Dallas-Fort Worth region offers the following competitive advantages for the engineering and R&D industry:

- Existing local engineering and R&D services industry companies include:



- Existing regional engineering and R&D services industry companies include:





# Addison Region – Engineering and R&D Services Positioning

Addison's location within the Dallas-Fort Worth region offers the following competitive advantages for the engineering and R&D services industry:

- **Access to a skilled regional workforce**
  - **Four-year degree talent pipeline in the surrounding region**
    - **The University of Texas at Dallas:** Located in Richardson, offers relevant degree programs in the fields listed in the table to the right.
    - **University of North Texas:** Located in Denton, offers certificates to doctorate level programs in the computer science fields listed in the table to the right. In addition, programs in Management Science, Biochemistry and Molecular Biology, and Bioengineering and Biomedical Engineering are also starting to be offered.

Relevant Degree Programs (2016-2017)	Bachelor	Master
<b>The University of Texas at Dallas</b>		
Management Science	38	243
Management Sciences and Quantitative Methods, Other	-	169
Marketing/Marketing Management, General	102	67
Systems Engineering	-	57
Bioengineering and Biomedical Engineering	63	23
Biotechnology	-	13
Bioinformatics	-	3
<b>University of North Texas</b>		
Management Sciences and Quantitative Methods, Other	16	7
Marketing/Marketing Management, General	208	-
Aeronautics/Aviation/Aerospace Science and Technology, General	24	-

Source: National Center for Education Statistics, 2017

# Addison Region – Engineering and R&D Services Positioning

The Town of Addison offers the following competitive advantages for businesses:

- **Addison has an abundance of talent and competitive wages for the Engineering and Research & Development Services industry**

OCCUPATION	CONCENTRATION				
	ADDISON	GREATER REGION	CHICAGO MSA	KANSAS CITY MSA	AUSTIN MSA
Architectural and Civil Drafters (SOC 17-3011)	2.0	1.2	0.6	1.4	1.5
Customer Service Representatives (SOC 43-4051)	2.0	1.3	1.1	1.3	1.2
Sales Representatives, Services, All Other (SOC 41-3099)	1.9	1.4	1.3	1.2	1.9
Market Research Analysts and Marketing Specialists (SOC 13-1161)	1.6	0.9	1.2	1.3	1.3
Management Analysts (SOC 13-1111)	1.4	1.0	1.7	0.9	0.9

Source: JobsEQ, 2018 - Dallas County Community College District

OCCUPATION	WAGES				
	ADDISON	GREATER REGION	CHICAGO MSA	KANSAS CITY MSA	AUSTIN MSA
Architectural and Civil Drafters (SOC 17-3011)	\$56,100	\$54,800	\$64,900	\$55,420	\$53,120
Customer Service Representatives (SOC 43-4051)	\$37,200	\$36,200	\$38,570	\$35,910	\$33,750
Sales Representatives, Services, All Other (SOC 41-3099)	\$65,100	\$63,500	\$64,980	\$66,840	\$54,450
Market Research Analysts and Marketing Specialists (SOC 13-1161)	\$84,200	\$82,300	\$62,200	\$65,570	\$84,730
Management Analysts (SOC 13-1111)	\$95,100	\$92,800	\$91,730	\$94,000	\$95,760

Source: JobsEQ, 2018 - Dallas County Community College District

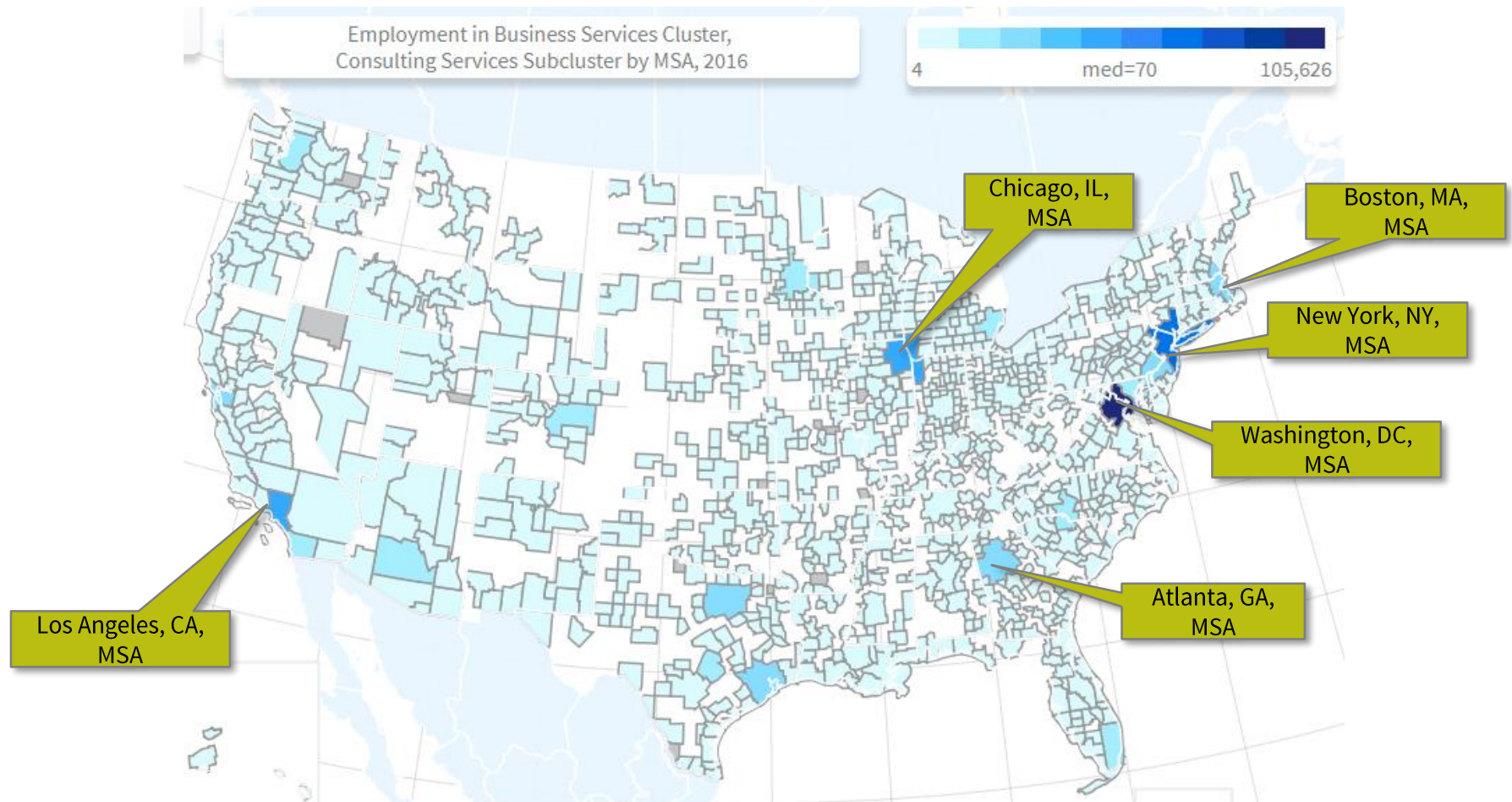
# Consulting Services Positioning



# Addison Region – Consulting Services Positioning

## Likely Competitors for Addison

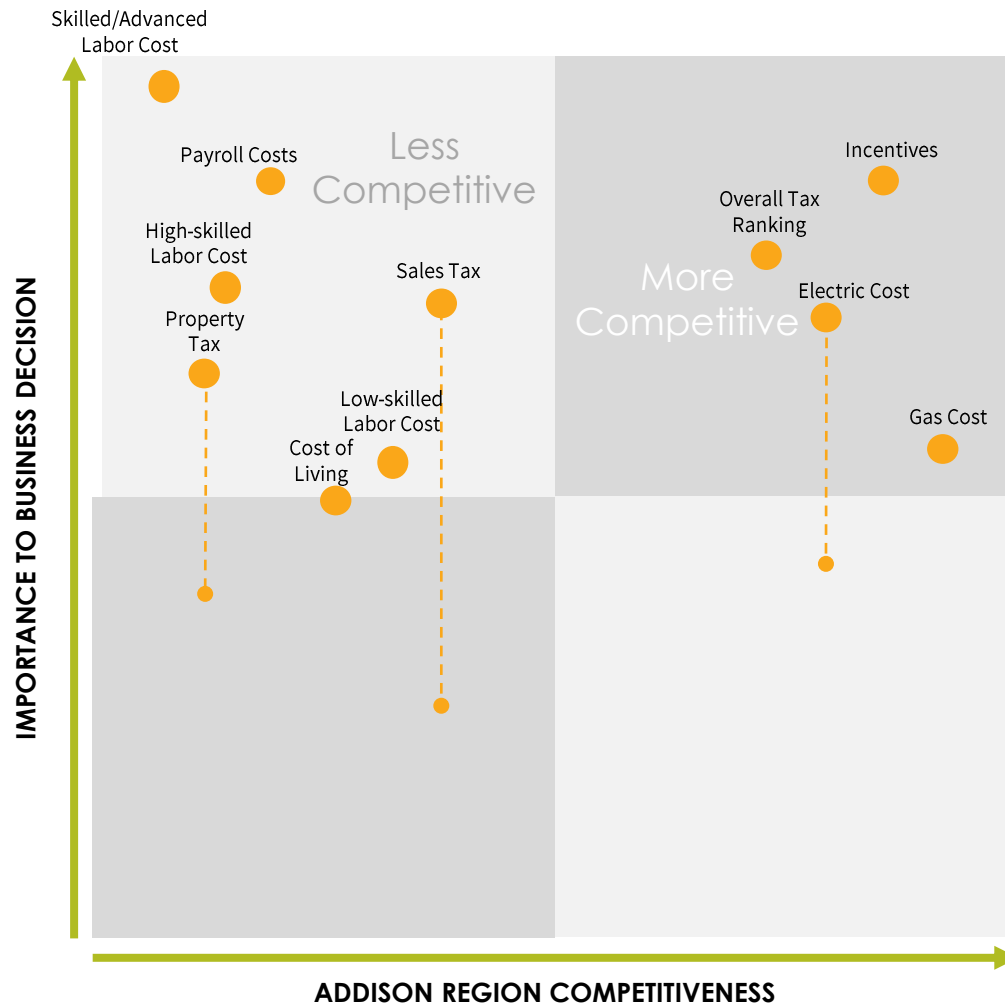
- High employment among US metro areas



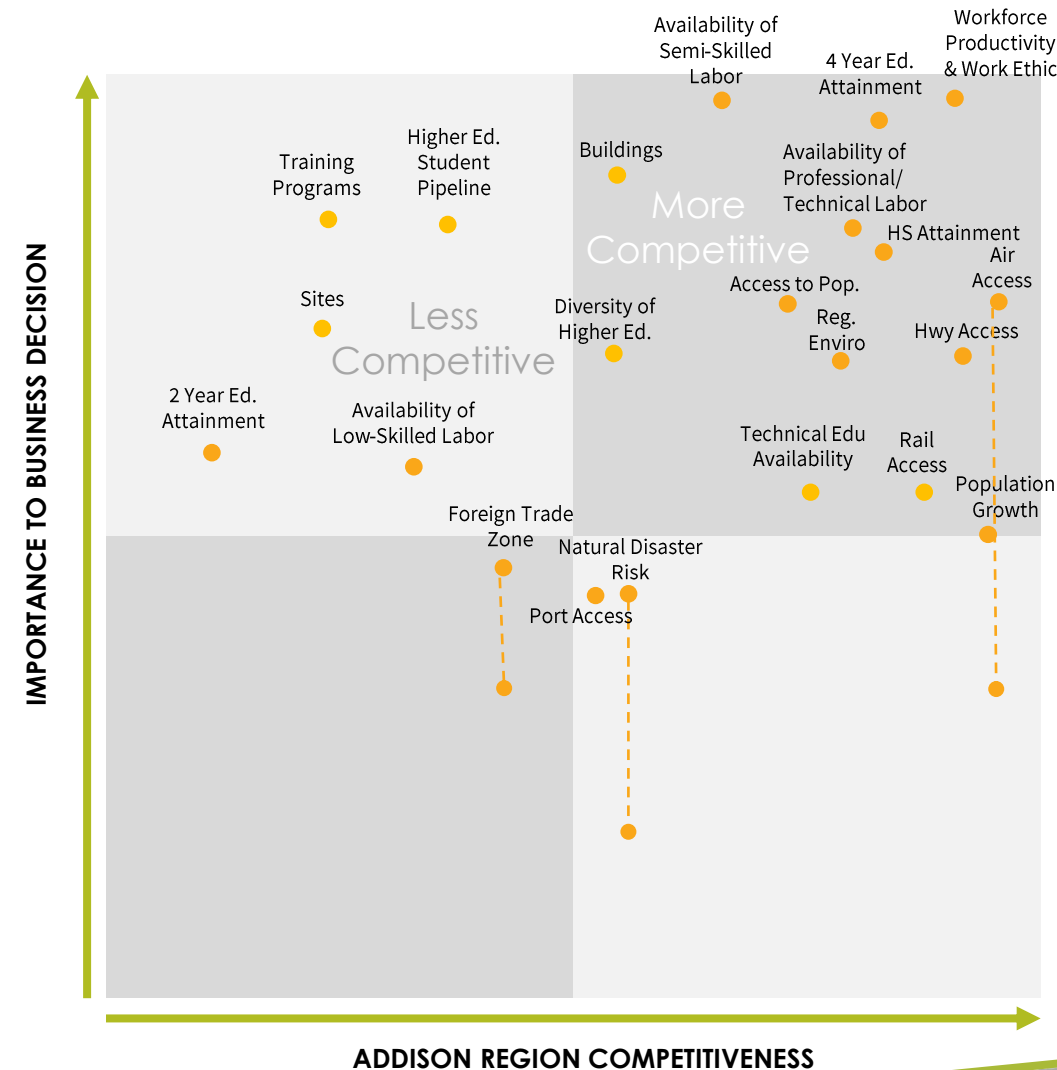
Source: U.S. Cluster Mapping Project, Institute for Strategy and Competitiveness, Harvard Business School

# Addison Region – Consulting Services Positioning

## GENERAL BUSINESS COSTS ASSET MAP



## GENERAL CONDITIONS ASSET MAP



Note: Dotted lines down represent the variability of each factor depending on the industry sector.

# Addison Region – Consulting Services Positioning

Addison's location within the Dallas-Fort Worth region offers the following competitive advantages for the consulting services industry:

- Existing local consulting services industry companies include:



- Existing regional consulting services industry companies include:





# Addison Region – Consulting Services Positioning

Addison's location within the Dallas-Fort Worth region offers the following competitive advantages for the consulting services industry:

- **Access to a skilled regional workforce**
  - **Four-year degree talent pipeline in the surrounding region**
    - **The University of Texas at Dallas:** Located in Richardson, offers relevant degree programs in the fields listed in the table to the right.
    - **University of North Texas:** Located in Denton, offers certificates to doctorate level programs in the computer science fields listed in the table to the right.
    - **DeVry University:** Located in Irving, offers degree programs from certificates up to masters level, including distance education, in relevant degree programs listed in the table at the right.
    - **Strayer University:** With several regional locations including North Dallas, offers distance education programs from certificate to masters level in Accounting and Business/Management, Business Administration and Management, Business/Commerce, Human Resources Management/Personnel Administration, Marketing and Organizational Leadership.

Relevant Degree Programs (2016-2017)	Bachelor	Master
<b>The University of Texas at Dallas</b>		
Business Administration and Management, General	-	337 <sup>d</sup>
Systems Engineering	-	57
Marketing/Marketing Management, General	102	67
<b>DeVry University</b>		
Business Administration and Management, General	47 <sup>d</sup>	84
Business Administration, Management and Operations	109 <sup>d</sup>	16
Human Resources Management/Personnel Administration, General	-	9
<b>University of North Texas</b>		
Business Administration and Management, General	-	127 <sup>d</sup>
Logistics, Materials, and Supply Chain Management	81	-
Marketing/Marketing Management, General	208	-
Operations Management and Supervision	44	-
Organizational Behavior Studies	72	-
Aeronautics/Aviation/Aerospace Science and Technology, General	24	-

Source: National Center for Education Statistics, 2017

# Addison Region – Consulting Services Positioning

The Town of Addison offers the following competitive advantages for businesses:

- **Addison has an abundance of talent and competitive wages for the Consulting Services industry**

OCCUPATION	CONCENTRATION				
	ADDISON	GREATER REGION	CHICAGO MSA	KANSAS CITY MSA	AUSTIN MSA
Customer Service Representatives (SOC 43-4051)	2.0	1.3	1.1	1.3	1.2
Sales Representatives, Services, All Other (SOC 41-3099)	1.9	1.4	1.3	1.2	1.9
Market Research Analysts and Marketing Specialists (SOC 13-1161)	1.6	0.9	1.2	1.3	1.3
Management Analysts (SOC 13-1111)	1.4	1.0	1.7	0.9	0.9
General and Operations Managers (SOC 11-1021)	1.2	1.0	1.4	1.0	1.0

Source: JobsEQ, 2018 - Dallas County Community College District

OCCUPATION	WAGES				
	ADDISON	GREATER REGION	CHICAGO MSA	KANSAS CITY MSA	AUSTIN MSA
Customer Service Representatives (SOC 43-4051)	\$37,200	\$36,200	\$38,570	\$35,910	\$33,750
Sales Representatives, Services, All Other (SOC 41-3099)	\$65,100	\$63,500	\$64,980	\$66,840	\$54,450
Market Research Analysts and Marketing Specialists (SOC 13-1161)	\$84,200	\$82,300	\$62,200	\$65,570	\$84,730
Management Analysts (SOC 13-1111)	\$95,100	\$92,800	\$91,730	\$94,000	\$95,760
General and Operations Managers (SOC 11-1021)	\$145,600	\$141,600	\$134,740	\$113,020	\$130,900

Source: JobsEQ, 2018 - Dallas County Community College District

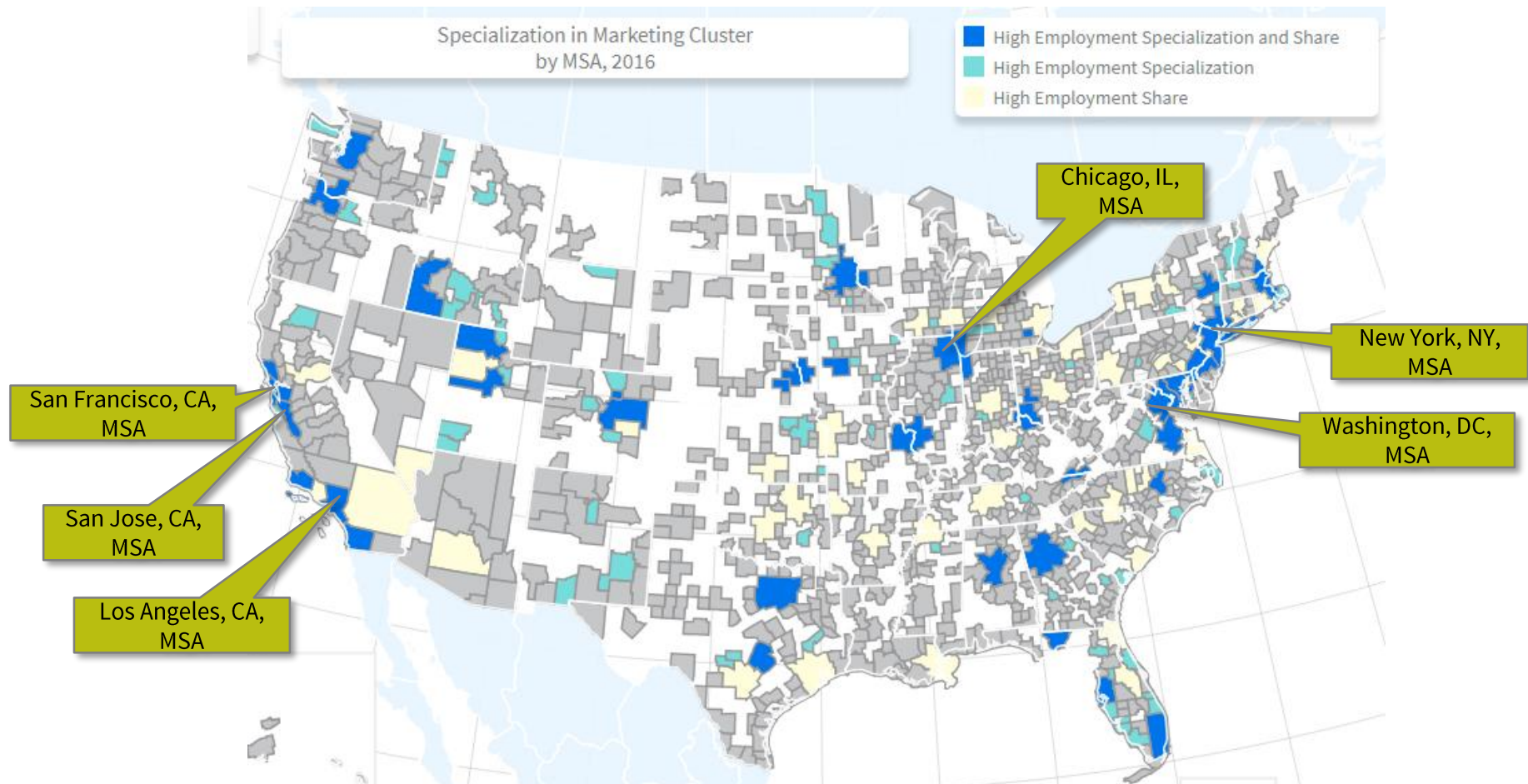
# Creative Services Positioning



# Addison Region – Creative Services Positioning

## Likely Competitors for Addison

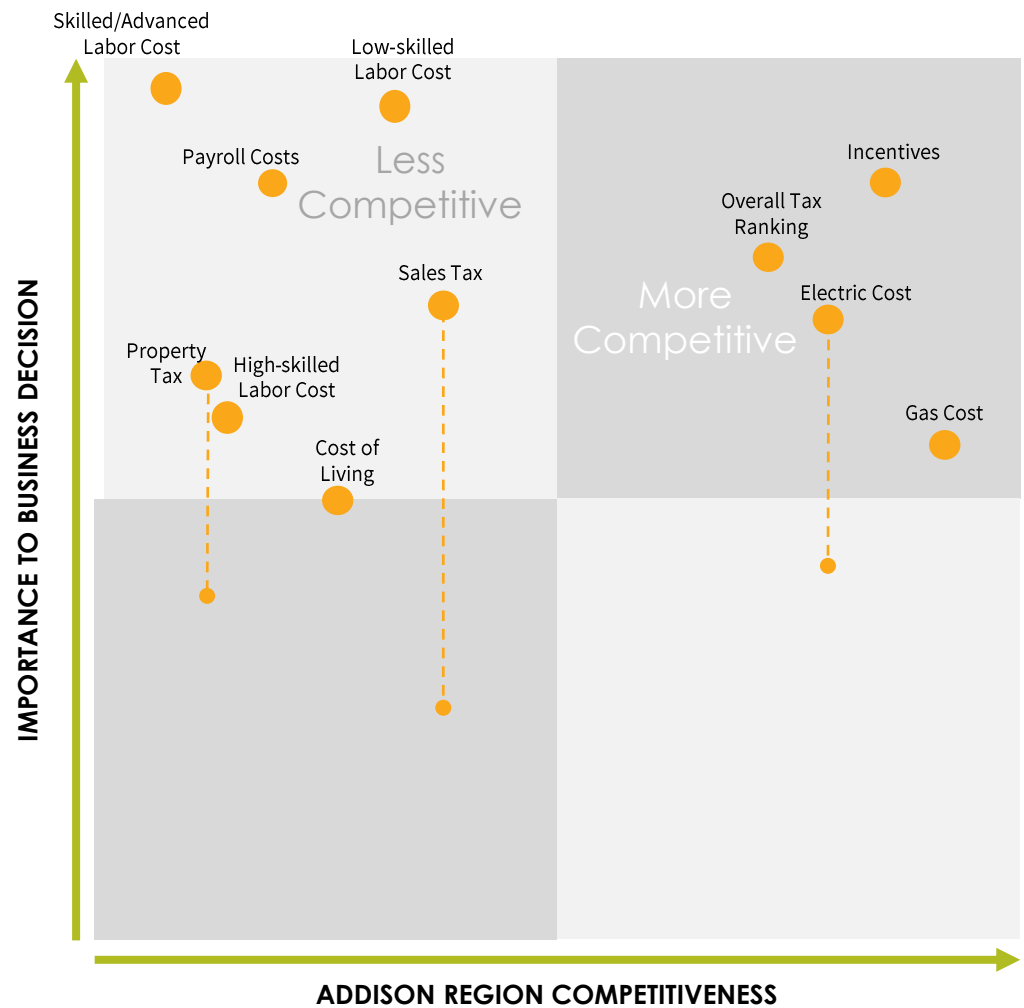
- High employment growth among US metro areas



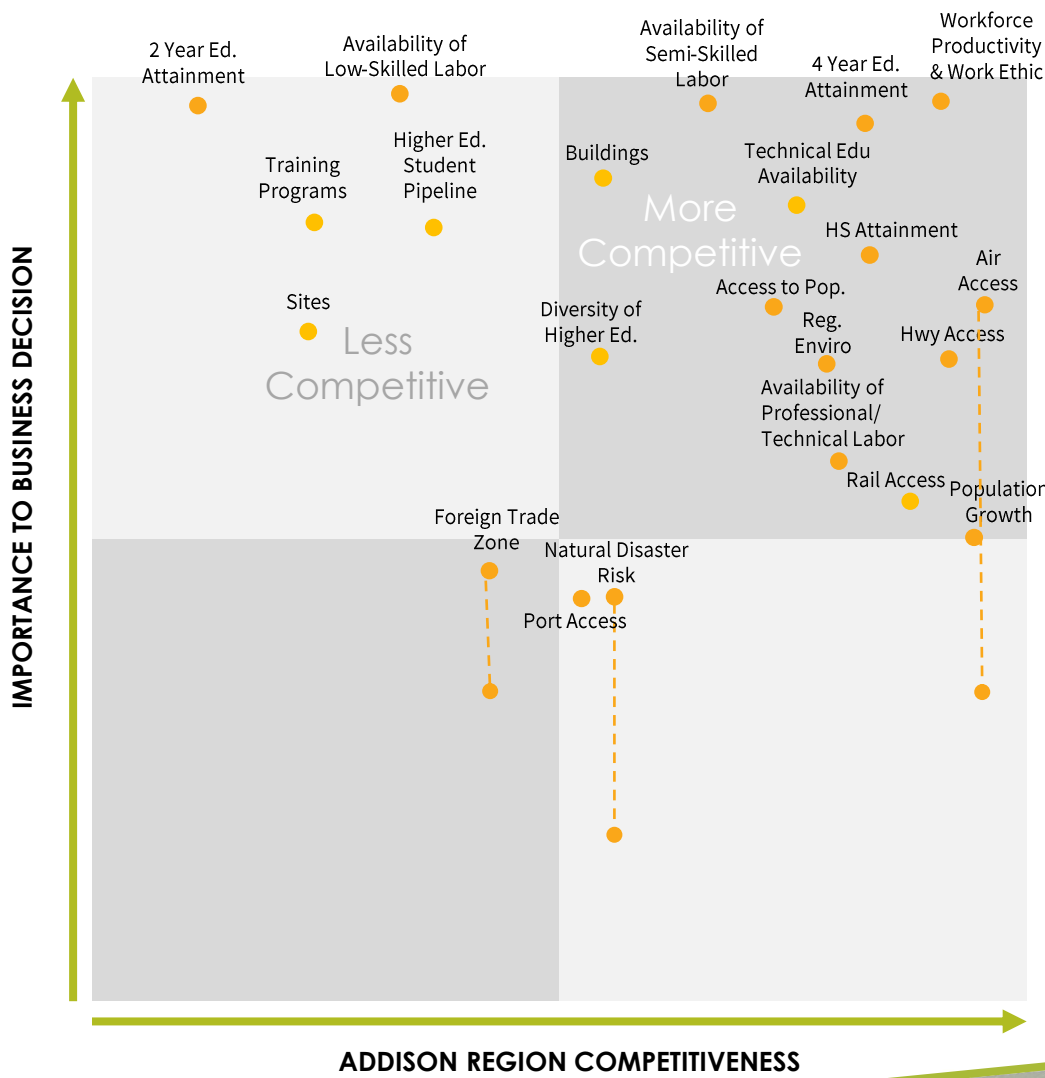
Source: U.S. Cluster Mapping Project, Institute for Strategy and Competitiveness, Harvard Business School

# Addison Region – Creative Services Positioning

GENERAL BUSINESS COSTS ASSET MAP



GENERAL CONDITIONS ASSET MAP



Note: Dotted lines down represent the variability of each factor depending on the industry sector.

# Addison Region – Creative Services Positioning

Addison's location within the Dallas-Fort Worth region offers the following competitive advantages for the creative services industry:

- Existing local creative services industry companies include:



IDEA GROVE™



- Existing regional creative services industry companies include:





# Addison Region – Creative Services Positioning

Addison's location within the Dallas-Fort Worth region offers the following competitive advantages for the creative services industry:

- **Access to a skilled regional workforce**
  - **Strong talent pipeline in the surrounding region**
    - **MediaTech Institute - Dallas:** Offers one- to two-year certificates in Communication Technologies, including animation, photographic and film/video technology, and recording arts, as well as Web Page and Digital/Multimedia Design.
    - **The University of Texas at Dallas:** Offers certificates to doctorate level programs in the creative services fields listed in the table to the right.
    - **Richland College:** Located in Dallas, offers one-to two-year certificates up to associates level programs in Animation, Interactive Technology, Video Graphics and Special Effects; Tourism and Travel Services Marketing Operations; and Web Page, Digital/Multimedia and Information Resources Design.
    - **North Lake College:** Located in Irving, offers certificates and associates degrees in Web Page, Digital/Multimedia and Information Resources Design; Graphic Design; and Design and Visual Communications, General.

Relevant Degree Programs (2016-2017)	Associates	Bachelor	Master
<b>The University of Texas at Dallas</b>			
Marketing/Marketing Management, General	-	102	67
Digital Communication and Media/Multimedia	-	74	9
Game and Interactive Media Design	-	195	31
Relevant Degree Programs (2016-2017)	Associate	Bachelor	Master
<b>South University – The Art Institute of Dallas</b>			
Web Page, Digital/Multimedia and Information Resources Design	-	19	-
Cinematography and Film/Video Production	9	11	-
Commercial and Advertising Art	-	4	-
Commercial Photography	3	6	-
Game and Interactive Media Design	-	1	-
Graphic Design	9	9	3
Intermedia/Multimedia	-	14	-

Source: National Center for Education Statistics, 2017

# Addison Region – Creative Services Positioning

The Town of Addison offers the following competitive advantages for businesses:

- **Addison has an abundance of talent and competitive wages for the Creative Services industry**

OCCUPATION	CONCENTRATION				
	ADDISON	GREATER REGION	CHICAGO MSA	KANSAS CITY MSA	AUSTIN MSA
Demonstrators and Product Promoters (SOC 41-9011)	1.8	1.3	1.2	0.9	1.2
Public Relations Specialists (SOC 27-3031)	1.8	1.4	0.8	1.1	2.7
Market Research Analysts and Marketing Specialists (SOC 13-1161)	1.6	0.9	1.2	1.3	1.3
Graphic Designers (SOC 27-1024)	1.4	1.0	1.5	1.3	1.0
Advertising Sales Agents (SOC 41-3011)	1.1	0.8	1.8	1.1	1.1

Source: JobsEQ, 2018 - Dallas County Community College District

OCCUPATION	WAGES				
	ADDISON	GREATER REGION	CHICAGO MSA	KANSAS CITY MSA	AUSTIN MSA
Demonstrators and Product Promoters (SOC 41-9011)	\$29,400	\$28,700	\$33,470	\$28,420	\$30,160
Public Relations Specialists (SOC 27-3031)	\$70,200	\$68,300	\$64,410	\$62,700	\$67,390
Market Research Analysts and Marketing Specialists (SOC 13-1161)	\$84,200	\$82,300	\$62,200	\$65,570	\$84,730
Graphic Designers (SOC 27-1024)	\$54,100	\$52,700	\$59,170	\$51,670	\$57,880
Advertising Sales Agents (SOC 41-3011)	\$62,500	\$61,100	\$53,940	\$53,020	\$56,210

Source: JobsEQ, 2018 - Dallas County Community College District

# Section 8: Addison Vision and Goals

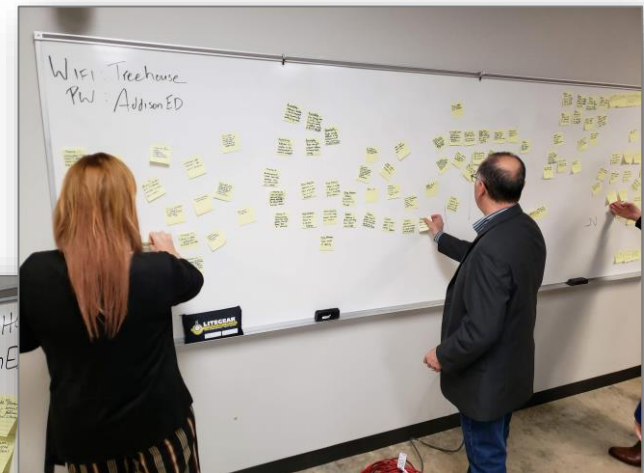


On-Site Work Session Summary	280
Previous Vision and Goals	284
Discussion of Updated Vision and Goals	286
Updated Vision and Goals	288
Summary of Goals and Strategies	289

# On-Site Work Session Summary

## SESSION SUMMARY

Ady Advantage held an on-site goals and visioning work session on October 22, 2018. The session included a project status update, an overview of Ady Advantage's Economic Development 360 Framework, a visioning activity and a goal-setting activity. The following pages serve as a summary of this work session and the resulting updated vision and goals.



# On-Site Work Session Summary

## SESSION SUMMARY

Below is a list of participants in the goals and visioning session:

NAME	TITLE
Joe Chow	Mayor
Paul Walden	Mayor Pro Tempore
Tom Braun	Deputy Mayor Pro Tempore
Ivan Hughes	Council Member
Lori Ward	Council Member
Marlin Willesen	Council Member
Guillermo Quintanilla	Council Member
Wes Pierson	City Manager
Ashley Mitchell	Deputy City Manager
Orlando Campos	Director of Economic Development and Tourism
Wilson Kerr	Economic Development Manager
Dave Collins*	Special Project Committee Member
Ron Holly*	Special Project Committee Member

\*Observer

# On-Site Work Session Summary – Visioning Activity

## WHAT WOULD YOU LIKE THE HEADLINES TO SAY IN THE NEXT 5 TO 10 YEARS?

- Addison Circle: The hub of live, work, entertainment and mobility.
- Addison is a great place to live, work, and play.
- Addison has done it again! The little town that could has reinvented itself.
- Addison is the new Center of Dallas Area – the place to be - work, live, and play. Innovative and forward thinking-Trend Setters
- In the next 10 years Addison will run out of all the useful land. Redevelopment will be very important to the future growth of our town. Constant improvements will be needed to keep Addison vibrant.
- Addison Voted Best Place to live, work and play for the 5<sup>th</sup> consecutive year.
- Addison – the ideal place to live, work, play.
- Center of Innovation, Center of Business, Best Place to Meet People, Thriving, Best Events

## IF NOTHING CHANGES, WHAT DO YOU THINK THE HEADLINES WILL SAY IN 5 TO 10 YEARS?

- It's not clear, probably the same but maybe not in the headlines.
- Addison, the little town that once was on the creative edge has been passed by.
- Addison – stuck in the past; Clinging to its past successes.
- If nothing changes, that means Addison will be behind since technology and trends are changing. Neglected forgotten, I thought it was Dallas
- Not possible, as we are changing now and constantly, but I suppose if things were bad you could say, “Addison struggles to stay relevant (we’re not the leader)”
- Addison – How did they miss the Economic Train?
- Addison, the way it was; What happened to Addison? Addison can’t decide what it wants to be.

# On-Site Work Session Summary – Visioning Activity

## SPECIFICALLY THINKING ABOUT MAIN AUDIENCES, WHAT WOULD YOU LIKE EACH OF THESE GROUPS TO BE SAYING IN THE NEXT 5 TO 10 YEARS?

### Employer/Businesses

- Great location, office space, talent and easy transportation.
- My employees love being in Addison
- The Town is easy to do business with
- The perfect place to do business! Great walkability a can-do City, and top of the line amenities.
- Easy to do business; easy to recruit talent, place we can make money
- Great infrastructure; policies friendly, vibrant
- I'm *still* never leaving. Place of choice because Addison is easy to do business with.
- Great pool of talent located here
- Very supportive Clients in our Community
- Love being here, place of choice, great people, great environment

### Residents

- Fun; Cool; Vibrant; Pride in Ownership; Safe
- Love living in Addison. It's safe; we have great restaurants, theatres, and parks. I love seeing my neighbors and friends at the Athletic Club and around Town.
- Love being here, top notch City services, low tax rate, great local events.
- Safe place; plenty of living options; great neighborhoods; proud to live in Addison
- Great City Services, clean, beautiful
- Exciting innovation
- Shhhhh. . . still best kept secret in North Dallas. Innovation happening here.
- My home has been a very good investment.
- Best place to live. Easy to get around. Love to see the exciting innovations.

### Employees

- Great employers
- Ease of access (i.e., transportation)
- Love of the nearby restaurants/entertainment
- I love walking in Addison
- I value the lunch and dinner choice, the chance to walk and be outside
- My commute is tolerable and once here, I love being here.
- Great place to work, professional environment, lots of options to entertain clients and centrally located
- Place to stay & have fun after work
- Proud to work here, nice town, nice government, great leaders
- I love my job. Home away from Home. I'm proud to work in Addison.
- I enjoy being close to my place of employment
- Love coming to work; love to go out with friends; my home away from home.

### Visitors

- Fun
- Ease of Access (i.e. transportation)
- I love coming to Addison. It's very easy to get to, easy to get around in, and offers lots of things I like to do.
- What a cool place! I wish my City was like this. So many options for dining, entertainment, easy to get to
- Place to come meet friends and have fun; Lots of attractions; Destination for weekend getaway
- Great town, great restaurants, great festivals.
- I'm coming back and bringing my friends!
- I wish I had found this town sooner.
- What a cool place, I wish my Town was like this, So many options for dining and entertainment. I have Town Envy
- Great events that are always fresh. Always love going to Addison because I learn/experience something new



# Previous Vision and Goals

## 2010 STRATEGIC PLAN VISION AND GOALS

Addison's 2010 strategic plan created the following vision and goals for the region. The Town has since made significant progress on these goals.

### 2010 Vision:

*Addison is the premier destination for quality investment and growth in North Texas.*

### 2010 Goals and Accomplishments:

#### 1. Build capacity to conduct economic development.

- City council establishes Economic Development Fund to fund an economic development department.
- Director and support staff hired.
- Actively market the Town through print, social media, and networking events.
- Develop economic development page on Town's website.
- City council adopted local Chapter 380 incentive policy which serves as the basis for evaluating and supporting potential company relocations/expansions to Addison.
- Launch and manage the Town's Annual Business Registration process.
- Absorbed tourism functions into department.
- Membership into the International Economic Development Council and Texas Economic Development Council.

#### 2. Support the existing economic base through business retention and expansion.

- Launched monthly meet and greet events at office buildings.
- Set up one on one meetings with local businesses.
- Established agreement with Metrocrest Chamber of Commerce to provide support to local businesses.
- Develop strong working relationships with North Dallas Chamber of Commerce to leverage their support for small business advocacy.
- Work closely with Marketing and Public Communications Department on marketing campaigns for restaurants and hotels.
- Manage Hotel Support Program to attract meetings and conferences to full service hotels.
- Provide sponsorship support to groups like the OU Club of Dallas, Dallas Cup, and the South Asian Film Festival that led to increased hotel nights in Addison.
- Established Annual Economic Development Luncheon.

# Previous Vision and Goals

## 2010 STRATEGIC PLAN VISION AND GOALS

### **2010 Goals and Accomplishments (continued):**

#### **3. Focus business attraction on priority growth sectors.**

- Established relationship with key North Texas commercial real estate broker associations such as the North Texas Commercial Association of Realtors, the Real Estate Council, and Commercial Real Estate Women.
- Develop process for responding to RFPs from economic development allies such as the Dallas Regional Chamber, Governor's Office, and site selection consultants on corporate relocation projects.
- Strengthen relationship with the World Affairs Council to market Addison internationally.
- Launch the Addison TreeHouse which has resulted in over 100 business startups launched and over \$3 Million in private investment for startups.

#### **4. Raise the profile of Addison regionally and nationally.**

- Become active members of the DFW Marketing Team through the Greater Dallas Regional Chamber of Commerce.
- Develop a new economic development video.
- Take on board position with the North Central Texas Economic Development District Board.
- Award recognitions from the International Economic Development Council, Texas Economic Development Council, Google E-City Award and NerdWallet's designation as Addison #1 Place in Texas to start a business.
- Recognitions from the Dallas Business Journal as a Top Economic Development Organization for four consecutive years.
- Director selected to D Magazine's Dallas 500 List of most influential business leaders in North Texas.
- Work closely with Town's marketing and communications department on a marketing strategic plan for tourism.

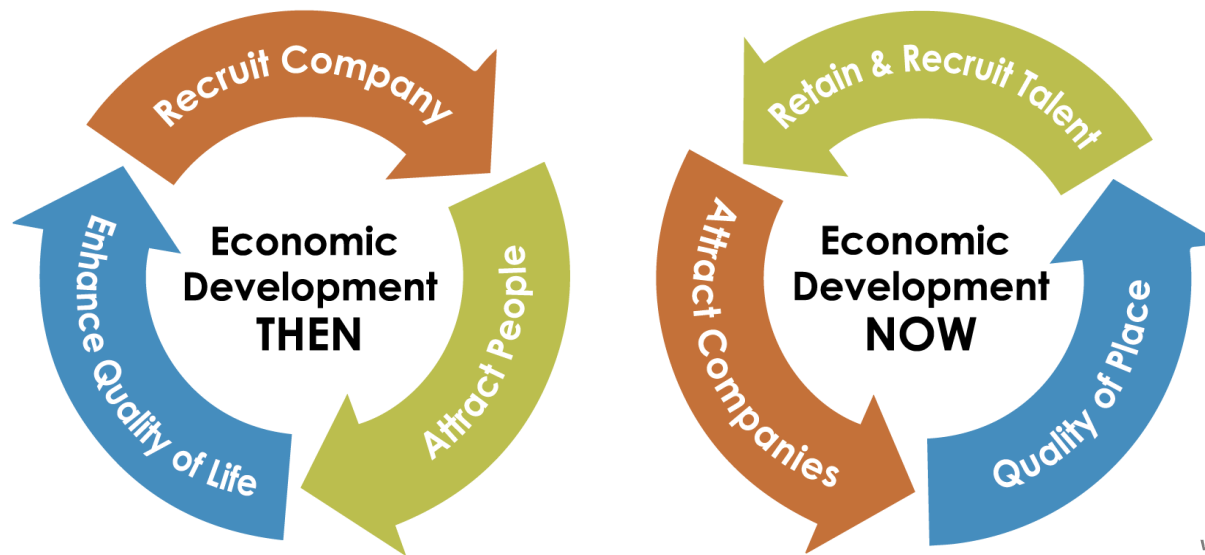
#### **5. Maintain and enhance Addison's quality of place.**

- Work closely with Development Services on supporting the Town's Master Land Use Plan to ensure quality investments are brought in.
- Provide support to the Addison Airport on the development of its strategic plan.
- Provide support to Metrocrest Services, Addison Arbor Foundation, and Addison Legacy Foundation.
- Provide support for incentive negotiations for the redevelopment of Village on the Parkway.
- Provide support for the redevelopment of Addison Grove.
- Launch region's first Co-working in the Park Event.

# Discussion of Updated Vision and Goals

## CONTEXT FOR UPDATED VISION

The world of economic development and the competitive sphere in which the Town of Addison plays in are changing. Specifically, it is changing from a world where talent moves to where the employers are to one where the employers move to where they can attract and retain talent. This major shift change is diagrammed in the graphic below.



© 2019 Ady Advantage  
www.AdyAdvantage.com

*Accordingly, we have updated the Addison vision to reflect this change, as well as to better meet the need of Addison's customers, which include not only its businesses, but also its residents, its employees and its visitors. The updated vision is people-focused, not just business-focused and it recognizes the symbiotic relationship of both of these groups. Both need to be thriving in order for the other to do so. Addison has long been known as business-friendly, progressive, entrepreneurial, collaborative, and innovative; and this updated vision will build on and enhance these qualities.*

# Discussion of Updated Vision and Goals

## PLACE-BASED ECONOMIC DEVELOPMENT

While traditional economic development tools such as incentives, a friendly business climate and the provision of utilities and infrastructure are still an important part of the equation, the role of “place” and “connectivity” has become an essential component of retaining, growing and attracting companies of all sizes. Over the last 20 years, significant data, in addition to growing anecdotal evidence, clearly demonstrates the Economic Development benefits of investing in walkable, mixed-use environments that provide a range of uses all within walking distance. To accomplish these ends, there must be an effort on placemaking, which integrates facets of town planning and urban design, transportation and infrastructure, mobility and public policy.

## RELEVANCE TO THIS PLAN

This update to the city’s Economic Development Plan establishes placemaking as a key tool to align and link the Town’s core economic development functions with planning and infrastructure functions. It should be noted that a number of in-depth planning efforts and studies are currently underway within the Town, or recently completed (including but not limited to the Inwood Road Corridor Special Area Study; Master Transportation Plan; Addison Circle Special Area Study; Parks, Recreation and Open Space Master Plan; Belt Line 1.5 Beautification Master Plan). The intent of this report is not to replace those more focused efforts, but to provide a bridge between the Town’s land use, planning and transportation efforts and the its economic development policies.

The goals and strategies contained herein build upon the Town’s recent and ongoing plans, while offering insight as to how to create a scenario where “the whole becomes greater than the sum of its parts.” As such, recommendations are focused on issues such as increased connectivity between existing and future nodes of activity, in addition to efforts to provide more street life and activity to enhance public space and walkability throughout the Town. Finally, recommendations consider the continued evolution of both the Town and the region in terms of how land use and zoning might be considered from an economic development standpoint, in recognition of the Town’s current Comprehensive Plan and other efforts.

### ADY INSIGHTS

#### What is Placemaking?

Placemaking in its most basic form “is the process of creating quality places that people want to live, work, play, and learn in.” (CNU, 2014). The elements of a quality place include safety, connectedness, conduciveness to authentic experiences, accessibility to all people and modes of transportation, comfortability, sociability, encouraging social interaction, and facilitating civic engagement.

# Updated Vision and Goals

## UPDATED VISION

*Addison is the vibrant, active and growing hub of North Texas where both people and businesses thrive.*

## GOALS TO SUPPORT THE UPDATED VISION

The following goals were determined from the on-site goals and visioning work session. The bullet points under each represent key areas of focus to support those goals. These areas of focus will be developed further into strategies and tactics to achieve these goals.

### **GOAL 1: Promote Addison as a place of choice for talent looking to live, work and/or play in the Dallas-Fort Worth region.**

- Unified branding/marketing, including information and tools that employers can use to help recruit and retain employees
- Targeted outreach to “people” audiences, including residents, employees, visitors
- Leverage existing audiences, such as employees, to make Addison a place not just to work, but to stay late, live and play

### **GOAL 2: Maintain a business climate that differentiates Addison and supports the needs of its existing and new corporate audiences in Addison’s recommended target industries.**

- Policies to support business retention, expansion, recruitment, and start-up
- Policies to create greater synergies between and among existing industries
- Events/networking to connect corporate businesses in the region

### **GOAL 3: Promote Addison’s key assets and points of difference to its target industries.**

- Articulation of Addison’s ease of doing business and key assets (location, diverse neighborhoods, transportation assets, walkable core) to its audiences. Focus on location which is an even greater asset with gravity of the region moving north
- Targeted outreach to “business” audiences

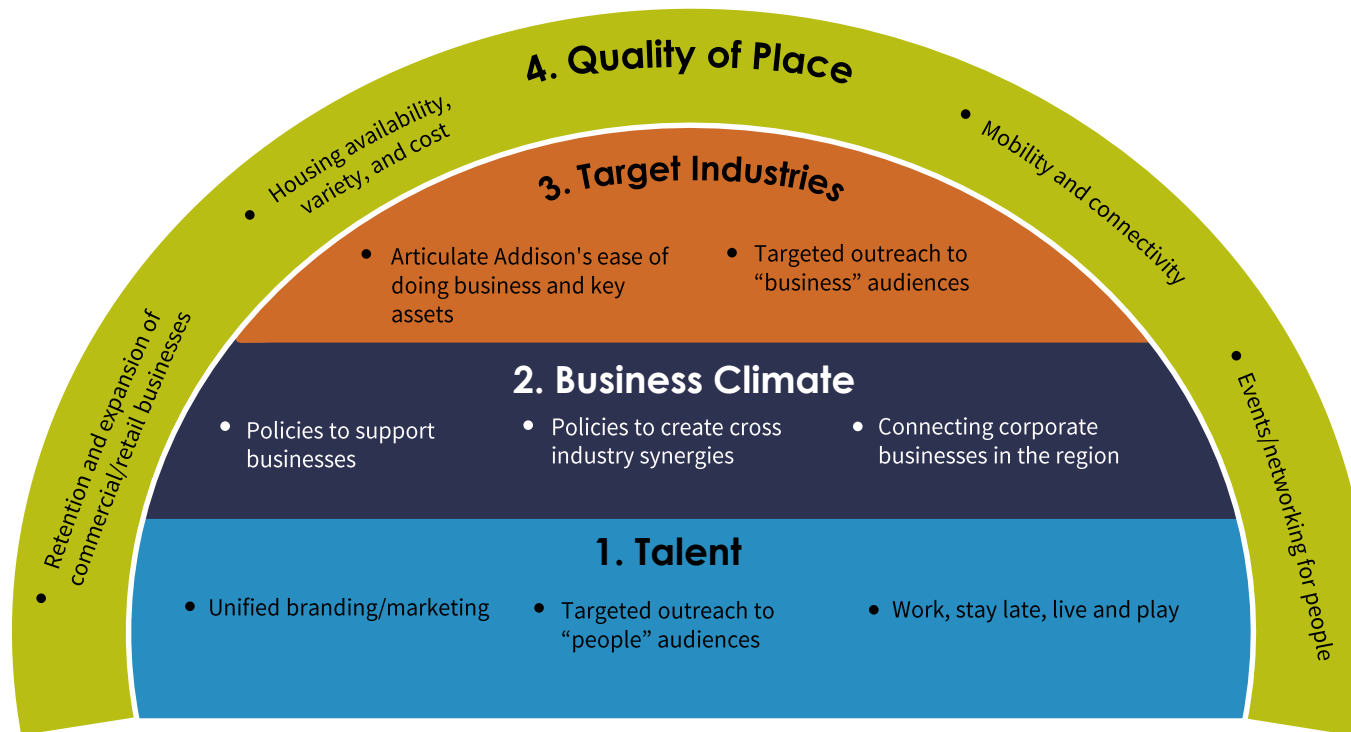
### **GOAL 4: Leverage Addison’s quality of place to support its “people” audiences (residents, employees, visitors).**

- Retention and expansion of commercial and retail businesses
- Housing (availability, variety and cost)
- Mobility and connectivity (transportation assets, walkability, wayfaring, etc.)
- Events/networking for people



# Summary of Goals and Strategies

*Addison is the vibrant, active and growing hub of north Texas where both people and businesses thrive.*



**Goal 1:** Promote Addison as a place of choice for **talent** to live, work, and play in the Dallas Fort-Worth region.

**Goal 2:** Maintain a **business climate** that differentiates Addison and supports the needs of its existing and new corporate audiences in Addison's recommended target industries.

**Goal 3:** Promote Addison's key assets and points of difference to its **target industries**.

**Goal 4:** Leverage Addison's **quality of place** to support its "people" audiences (residents, employees, visitors).

# Section 9: Economic Development Framework and Strategic Plan Recommendations

**GOAL 1:** Promote Addison as a place of choice for talent looking to live, work and/or play in the Dallas-Fort Worth region.

# Economic Development Strategic Plan

## GOAL 1: PROMOTE ADDISON AS A PLACE OF CHOICE FOR TALENT LOOKING TO LIVE, WORK AND/OR PLAY IN THE DALLAS-FORT WORTH REGION.

### STRATEGY 1

Create a unified talent attraction brand, messaging and marketing tools that builds off the Town's existing brand and can be used not only by the Town of Addison, but also by its employers to help retain and attract talent to Addison.

### TACTICS

1. Create a talent attraction brand that supports the Town's existing brand. A talent attraction brand and messaging, unlike a typical economic development brand, should focus first and foremost on those aspects of Addison that make it attractive to the types of employees that Addison companies need. The messaging for these groups should include things like Addison's unique housing options, proximity to major metro areas, creative culture, transportation assets, etc.
2. Create social media campaigns to promote positive community news in Addison. Create a group of brand ambassadors from the community who will push out news through their social media accounts as well. This could include business leaders, residents, government officials, regional partners, etc.
3. Develop online content that can be used to drive traffic from various talent attraction campaigns. This should include key information on quality of life, as well as general job opportunities and area employers.

### ADY INSIGHTS

#### Mid Iowa Growth Partnership.

The brand and tagline developed for this 10-county region in Iowa is intended to be customized to highlight the particular attribute that is the focus of that any given piece or campaign.



# Economic Development Strategic Plan

## GOAL 1: PROMOTE ADDISON AS A PLACE OF CHOICE FOR TALENT LOOKING TO LIVE, WORK AND/OR PLAY IN THE DALLAS-FORT WORTH REGION.

### STRATEGY 2

Strategically identify and pursue the types of talent that would align with Addison's vision, as well as the needs of existing employers.

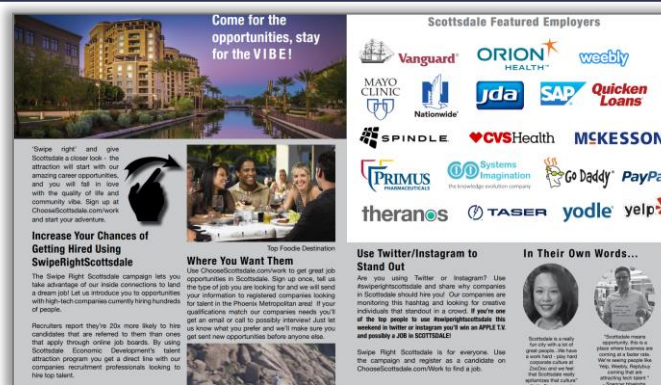
### TACTICS

1. Using data collected from business visits and/or surveys, determine which positions are most in-demand for existing Addison employers.
2. Create a targeted talent recruitment campaign to support current and anticipated future needs of Addison businesses. The media used for the campaign will depend on the target audience, but may include LinkedIn InMail campaigns, social media campaigns, direct mail, print advertising, etc.
3. Create a marketing campaign focused on recruiting people in the Dallas-Fort Worth region to live and/or work in Addison. The messaging for this campaign should focus on what makes Addison stand out from the Dallas-Forth Worth metro region.
4. Develop and promote programs and activities that support targeted sectors such as industry specific meet up groups and conferences.

### ADY INSIGHTS

#### Choose Scottsdale - #swiperightScottsdale

A campaign created by the City of Scottsdale Economic Development Department to show talented individuals and startup companies that Scottsdale is an amazing place to live, work and do businesses. The campaign was highly successful in garnering media attention and getting people talking about Scottsdale as more than just a great place to visit. Various marketing materials were produced including the Swipe Right Scottsdale T-shirt, print documents promoting Scottsdale and the use of the Twitter #SwipeRightScottsdale.





# Economic Development Strategic Plan

## GOAL 1: PROMOTE ADDISON AS A PLACE OF CHOICE FOR TALENT LOOKING TO LIVE, WORK AND/OR PLAY IN THE DALLAS-FORT WORTH REGION.

### STRATEGY 3

Address talent attraction and development issues using standard, as well as unique and non-traditional programs and incentives. This may include different strategies for corporate businesses versus commercial/retail/service businesses.

### TACTICS

1. Use BRE information collected to continually monitor the talent needs of area businesses.
2. Partner with local educational institutions to ensure talent pipeline is in alignment with business needs. Address gaps as needed.
3. Gain an understanding of regional talent initiatives that may be happening in the Dallas-Fort Worth MSA. Consider partnerships with the Dallas Regional Chamber and other groups to help get messaging out about Addison.
4. Collect information on the landscape of talent incentives options. Conduct a peer analysis to explore the existing landscape of incentives aimed at talent recruitment. Use surveys or other stakeholder engagement activities to understand the level of draw and impact various talent-driven incentives would have on a decision to relocate. Explore potential funding sources that may support these incentives.
5. Create a talent recruitment playbook for area businesses to use when recruiting talent to the region. This should include messaging about "Why Addison", with information on quality of life, networking events/groups, incentives, etc.

#### ADY INSIGHTS

**Newton, Iowa.** The City of Newton has used tax revenues to create a slate of housing toolbox incentives. A more non-traditional incentive used to attract new residents provides a grant of \$10,000 to purchase a new home in the city.



**GOAL 2:** Maintain a business climate that differentiates Addison and supports the needs of its existing and new corporate audiences in Addison's recommended target industries.

# Economic Development Strategic Plan

**GOAL 2: MAINTAIN A BUSINESS CLIMATE THAT DIFFERENTIATES ADDISON AND SUPPORTS THE NEEDS OF ITS EXISTING AND NEW CORPORATE AUDIENCES IN ADDISON'S RECOMMENDED TARGET INDUSTRIES.**

## **STRATEGY 1**

Continually monitor needs of existing businesses and prioritize/address issues as appropriate.

## **TACTICS**

1. Prioritize Addison's corporate audiences and companies within its target industries for business retention and expansion visits on a regular basis. Consider using a survey to monitor the needs of those that you are not able to visit with.
2. Identify partners in the region that can help address business needs that are beyond the scope of the Town of Addison, so that Addison can act as the concierge service for employers. Communicate back to employers once issues are addressed.
3. Act as a facilitator between existing businesses to help encourage networking and local business support.
4. Align economic development incentive policies, including targeted industries, with supportive infrastructure and land use regulations.

# Economic Development Strategic Plan

**GOAL 2: MAINTAIN A BUSINESS CLIMATE THAT DIFFERENTIATES ADDISON AND SUPPORTS THE NEEDS OF ITS EXISTING AND NEW CORPORATE AUDIENCES IN ADDISON'S RECOMMENDED TARGET INDUSTRIES.**

## STRATEGY 2

Ensure Addison's policies support the types of attraction and expansion projects that align with Addison's target industries.

## TACTICS

1. Help prepare Addison for future opportunities, by facilitating a work session with city leadership that identifies the types of projects that Addison will support, using hypothetical projects. The session should identify high, medium, and low priority projects. Consider types of jobs being created, wages, type and negative externalities of industries, etc.



# Economic Development Strategic Plan

**GOAL 2: MAINTAIN A BUSINESS CLIMATE THAT DIFFERENTIATES ADDISON AND SUPPORTS THE NEEDS OF ITS EXISTING AND NEW CORPORATE AUDIENCES IN ADDISON'S RECOMMENDED TARGET INDUSTRIES.**

## STRATEGY 2 (CONTINUED)

Ensure Addison's policies support the types of attraction and expansion projects that align with Addison's target industries.

### TACTICS

2. Create an administrative approval process for zoning tools, including but not limited to Form-Based Codes, that implement walkable mixed-use by right.
3. Determine process efficiencies that could shorten approval timelines. Work with planning/zoning authorities to implement the new framework.

#### ADY INSIGHTS

**Chapel Hill-Durham, NC.** As a result of a station-area planning initiative to plan for anticipated light rail service, efforts were undertaken to streamline and clarify land use approval processes, including administrative approvals to provide greater transparency and efficiency to the private development and investment markets.





# Economic Development Strategic Plan

**GOAL 2: MAINTAIN A BUSINESS CLIMATE THAT DIFFERENTIATES ADDISON AND SUPPORTS THE NEEDS OF ITS EXISTING AND NEW CORPORATE AUDIENCES IN ADDISON'S RECOMMENDED TARGET INDUSTRIES.**

## **STRATEGY 3**

Maintain and grow the entrepreneurship ecosystem within Addison through gaining knowledge about the needs of this business audience.

## **TACTICS**

1. Conduct an assessment of the Addison Treehouse's competitiveness through input from those individuals/businesses that have accessed Addison's entrepreneurial programs, as well as through an assessment of similar entrepreneurial assets in the region. Using the findings from this assessment, determine the need for additional entrepreneurial resources in Addison.
2. Partner with community organizations to develop a plan around how Addison can provide additional entrepreneurial resources needed to become more competitive for entrepreneurs and startups.
3. Host events that bring Addison's entrepreneurs together for networking opportunities. This will help build the entrepreneurial culture in the region and provide entrepreneurs with the opportunity to learn from each other.

# Economic Development Strategic Plan

**GOAL 2: MAINTAIN A BUSINESS CLIMATE THAT DIFFERENTIATES ADDISON AND SUPPORTS THE NEEDS OF ITS EXISTING AND NEW CORPORATE AUDIENCES IN ADDISON'S RECOMMENDED TARGET INDUSTRIES.**

## STRATEGY 4

Create awareness about current business resources provided by the Town of Addison, as well as partner organizations. This will allow Addison to become a one-stop shop for economic development and business needs.

## TACTICS

1. Catalogue all existing resources for businesses in Addison, as well as those resources available at the regional and state level. This may include resources that are not provided by the Town, but by a partner organization.
2. Use this information in BRE visits and when talking to prospective businesses to showcase all of the business resources Addison has to support it, as well as its strong business climate. This information should also be catalogued on the Addison economic development website.

### ADY INSIGHTS

**Johnson County, MO.** Johnson County is located an hour away from Kansas City. It is home to a four year public university and the U.S. Air Force's largest bombing squadron. The EDC has recently updated its website and created a resources page that lists all local, regional, state and other partner resources. This allows JCEDC to play a connecting and convening role in helping businesses access the information they need.



**GOAL 3:** Promote Addison's key assets and points of difference to its target industries.

# Economic Development Strategic Plan

### GOAL 3: PROMOTE ADDISON'S KEY ASSETS AND POINTS OF DIFFERENCE TO ITS TARGET INDUSTRIES.

## STRATEGY 1

Ensure Addison’s brand and messaging resonate with its “business” audiences and marketing materials include the information needed for these companies to make growth decisions.

## TACTICS

1. Leverage Addison's airport as a key asset to attract businesses and/or other development that takes advantage of the airport setting.
2. Audit all current marketing materials, including the economic development website, social media pages, digital marketing, print media, etc. to determine its effectiveness in getting Addison's messaging across for various business audiences. This should include looking at the marketing materials from the viewpoint of a company looking to relocate or expand to ensure all necessary data and information is included.
3. Update the economic development website, as needed, to contain messaging and positioning from this report about why Addison is a great place to do businesses. This should also contain information specific to each target industry.

## ADY INSIGHTS

**Waupun, WI.** The City of Waupun is located along the 151 corridor in East Central Wisconsin. It is about 60 miles northeast of Madison and 70 miles northwest of Milwaukee. With a population of about 12,000, it also lays in two adjacent counties: Dodge and Fond du Lac Counties. There is a large manufacturing sector with a focus on metalworking and food and beverage. The Waupun area is one of the top milk producing regions in the world. Ady Advantage worked to develop target industries for the city, as well as a strategic plan to create readiness around these target industries. Deliverables also included branding and marketing materials to ensure all messaging resonated with its new target industries.



# Economic Development Strategic Plan

## GOAL 3: PROMOTE ADDISON'S KEY ASSETS AND POINTS OF DIFFERENCE TO ITS TARGET INDUSTRIES.

### STRATEGY 2

Conduct outreach to companies within Addison's target industries through researching, planning and executing relationship marketing strategies with decision makers in each industry.

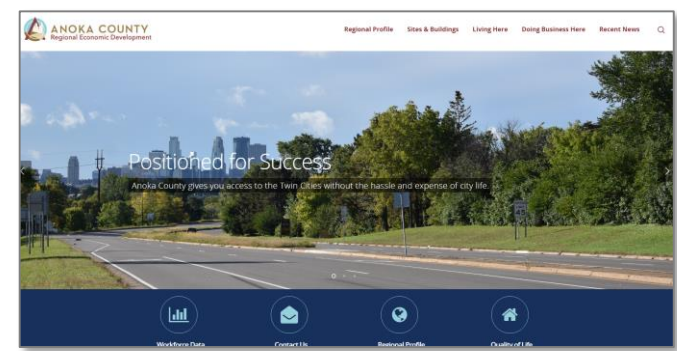
### TACTICS

1. Create marketing collateral for each of Addison's target industries that includes Addison's unique assets and positioning points for each industry. This content can be repurposed and used on Addison's website (see Strategy 1).
2. Conduct a lead generation campaign to identify companies within Addison's target industries that are growing and would consider relocating or expanding to the Dallas-Fort Worth Metro area.
3. Gain an understanding of regional business attraction initiatives that may be happening in the Dallas-Fort Worth MSA. Consider partnerships with the Dallas Regional Chamber and other groups to help get messaging out about Addison and its unique business assets.

### ADY INSIGHTS

**Anoka County, MN.** Anoka County Regional Economic Development (ACRED) is a recently formed consortium of municipal economic development organizations serving a county due north of Minneapolis. In December 2017, Ady Advantage produced an Economic Development Business Recruitment Roadmap for ACRED, which included extensive stakeholder interviews and desk research to identify regional positioning, target industry sectors, and an economic development strategic plan that included marketing goals, objectives and tactics.

Ady Advantage created a brand book that summarized the brand story, target audiences, brand promise, brand standards, and sample messaging, as well as provided guidance for the development of the website, regional profile, and target industry sheets.





# Economic Development Strategic Plan

## GOAL 3: PROMOTE ADDISON'S KEY ASSETS AND POINTS OF DIFFERENCE TO ITS TARGET INDUSTRIES.

### STRATEGY 3

Help build capacity among Addison's internal stakeholders and partners to enable them to help facilitate and reinforce Addison's brand and messaging.

### TACTICS

1. Create social media campaigns to promote positive economic development news in Addison. Create a group of brand ambassadors from the community who will push out news through their social media accounts as well.
2. Hold an economic development plan roll out and training with all economic development and community development stakeholders to disseminate key findings from this plan. This will help to ensure all partners are aware of Addison's economic development goals and messaging. This can also help create alignment and momentum on key initiatives.

### ADY INSIGHTS

**Invest Buffalo Niagara.** The Invest Buffalo Niagara regional group posts relevant social media stories and encourages all staff to share, with tailored comments. Then, regional partners and stakeholders also push this information out via their social media channels. This shows alignment in the region and encourages the spreading of positive economic development news.

**INVEST** BUFFALO  
NIAGARA

GOAL 4: Leverage Addison's quality of place to support its "people" audiences (residents, employees, visitors).

# Economic Development Strategic Plan

## GOAL 4: LEVERAGE ADDISON'S QUALITY OF PLACE TO SUPPORT ITS "PEOPLE" AUDIENCES (RESIDENTS, EMPLOYEES, VISITORS).

### STRATEGY 1

Elevate placemaking as a key element for the next generation of neighborhood developments needed to attract and retain Addison's target audiences, especially today's in demand workforce, by positioning Addison as North Texas' "new downtown".

### TACTICS

1. Maximize economic development opportunities with a focus on meeting the lifestyle needs of today's workforce by enhancing and creating vibrant, connected places and neighborhoods through development/redevelopment of locations based on adjoining context and market opportunities with a focus on the following prioritized locations:
  - Expansion of Addison Circle neighborhood to points north and south
  - Evolution of land uses to become more walkable, mixed-use nodes in targeted areas along Belt Line Road to create a sense of place and provide more economic support and social activity to support local businesses. By focusing such efforts along this corridor, new residential, retail and entertainment offerings can add to the Town's tax base, while improving economic competitiveness through enhanced sense of place and the provision of a range of housing options within close proximity to employment centers throughout the Town (a key factor for today's workforce).
  - Leverage investment at oncoming DART/Cotton Belt Train station, to include additional heights and densities, and incorporate residential, for this district as a "once-in-a-lifetime" opportunity to inject new growth and living opportunities within a land constrained municipality.
  - Focus on strategies to harness the regional market within existing constraints re: height and residential limitations along the Inwood Corridor:
    - A focus on high quality development for logistics, destination entertainment, flex light industrial/showroom space
    - Uses that complement and connect to the airport which is within close proximity
  - In light of the Town's limited land that is available for development, we recommend that the Town reconsider the Comprehensive Plan's guidance prohibiting single-family detached residential uses along the Tollway. The potential to provide a mix of uses, including owner occupied residential, in this area could help drive economic development, as proximity between home and work is of high value to a small, but important segment, of the workforce

# Economic Development Strategic Plan

## GOAL 4: LEVERAGE ADDISON'S QUALITY OF PLACE TO SUPPORT ITS "PEOPLE" AUDIENCES (RESIDENTS, EMPLOYEES, VISITORS).

### STRATEGY 1 (CONTINUED)

Elevate the focus for the next generation of neighborhood developments needed to attract and retain Addison's target audiences, including the positioning of Addison as a whole as the Dallas region's "new downtown".

### TACTICS

2. Consider appropriate transitions between existing mature neighborhoods, major corridors and future redevelopment throughout the Town, to retain and enhance existing communities.
3. Encourage development of for-sale multifamily condo and town homes to build upon existing base of apartment living, while providing ownership opportunities for existing and new residents.
4. Emphasize ongoing, neighborhood-oriented activation strategies such as pop-ups and weekly or monthly events to better retain daytime employment base into the evening, and provide additional activities to serve employees, residents and visitors. These could take place in both smaller and larger parks, in public and/or private parking lots, within the Inwood Road Corridor Special Area Study area and potentially at and around the Airport and adjacent properties.

### ADY INSIGHTS

**Huntington Station, New York.** A Master Development strategy was undertaken by the Town of Huntington to upzone vacant and underutilized properties located within close proximity to one of Long Island's busiest train stations. The effort has seen construction of early phases, consisting of a mix of uses, including high density multifamily, with appropriate transitions to adjoining residential neighborhoods.



# Economic Development Strategic Plan

## GOAL 4: LEVERAGE ADDISON'S QUALITY OF PLACE TO SUPPORT ITS "PEOPLE" AUDIENCES (RESIDENTS, EMPLOYEES, VISITORS).

### STRATEGY 2

Enhance walkability and connectivity within Addison, including maximizing economic development potential from the recently funded Cotton Belt rail line, to create more synergies for all audiences between and among different neighborhoods and districts.

### TACTICS

1. Prioritize walkability and connectivity infrastructure projects as a primary driver for investment and redevelopment
2. Continue aesthetic and pedestrian improvements along Belt Line Road to encourage infill redevelopment where appropriate, while complementing and enhancing existing businesses
3. Consider the reinvention of land parcels along Belt Line Road with opportunities to create internal pedestrian connectivity to foster walkable, mixed-use redevelopment
4. Invest in improved pedestrian, biking and other non-auto related mobility infrastructure, including dedicated biking/mobility lanes forming a convenient commuter network between destinations, along auto-oriented commercial corridors, including and especially Belt Line Road.

### ADY INSIGHTS

**Roanoke, TX.** Building upon a nascent hub of restaurant/hospitality, a downtown plan was conceived and implemented with a focus on walkability and creating an engaging pedestrian experience by essentially recreating a downtown environment. A Form-Based Code guided development activity and, in conjunction with efforts to enhance connectivity within the downtown, resulted in significant new investment and economic development activity including construction of residential and commercial uses adjacent to downtown, and the oncoming opening of the Peabody Hotel.





# Economic Development Strategic Plan

**GOAL 4: LEVERAGE ADDISON'S QUALITY OF PLACE TO SUPPORT ITS "PEOPLE" AUDIENCES (RESIDENTS, EMPLOYEES, VISITORS).**

## **STRATEGY 2 (CONTINUED)**

Enhance walkability and connectivity within Addison, including maximizing economic development potential from the recently funded Cotton Belt rail line, to create more synergies for all audiences between and among different neighborhoods and districts.

## **TACTICS**

5. Explore an enhanced aesthetic connection and the provision of new mobility options such as shuttles, including the advancing autonomous mobility services, between the Airport and points east and south (including to Inwood Rd in consideration of the recent Inwood Rd Corridor planning efforts)
6. Examine strategies to provide a more engaging walk between key neighborhoods and destinations, with a focus on creating a more activated experience (i.e. parklets, portable retail offerings at viable locations, programming). These efforts would include enhanced connections from employment centers at the Tollway to Addison Circle, from Addison Circle through the DART station south to Belt Line and from the residential communities south of Belt Line Rd. and east of the Tollway to shopping and retail amenities along Belt Line.

### **ADY INSIGHTS**

**Fort Worth, TX.** Camp Bowie Boulevard connecting the vibrant Museum District in Fort Worth to Loop 820 is evolving as an urban corridor with walkable, mixed use redevelopment nodes characterized by linking existing neighborhoods to the corridor.

# Economic Development Strategic Plan

## GOAL 4: LEVERAGE ADDISON'S QUALITY OF PLACE TO SUPPORT ITS "PEOPLE" AUDIENCES (RESIDENTS, EMPLOYEES, VISITORS).

### STRATEGY 3

In consideration of future rail service at the DART/Cotton Belt station, capitalize on Addison's geography with a focus on intra-regional connectivity and the opportunity to become a hub of regional mobility within the Dallas-Fort Worth market.

### TACTICS

1. Examine opportunities to provide intra-Town transit via shuttle to coincide with expected future construction of DART rail to attract new Class A office Tenants with a younger employee profile. New mobility options should be explored to better connect the Airport to areas south and east.
2. Consider partnerships with technology providers within the mobility realm, including companies at the forefront of oncoming autonomous transportation services.
3. Examine potential value-capture opportunities (i.e. creation of a TIRZ) that will arise from introduction of DART service, revenues of which could be directed toward a range of desired community investments, and for regional transportation dollars for targeted quality of life/mobility infrastructure in conjunction with NCTCOG.
4. When prioritizing trails and bike/mobility related improvements, consider a focus on connectivity to regional opportunities such as Veloweb (the regional bike network) and other connections to adjoining cities.

#### ADY INSIGHTS

**New Rochelle, NY.** As the first train station north of New York City to host both a Metro North Commuter rail stop and an Amtrak station, a comprehensive mixed-use redevelopment is currently underway with initial phases near completion. Connections to/from the train station, downtown districts, and suburban character neighborhoods were created with a Form-Based Code implemented that included value capture mechanisms to capture anticipated future revenues in an effort to fund and finance necessary infrastructure.

#### ADY INSIGHTS

**Richardson, TX.** CityLine development at PGBT and US75 in Richardson harnessed the market opportunity for a corporate campus with urban living and destination retail at previously an underutilized light rail transit station.

# Economic Development Strategic Plan

**GOAL 4: LEVERAGE ADDISON'S QUALITY OF PLACE TO SUPPORT ITS "PEOPLE" AUDIENCES (RESIDENTS, EMPLOYEES, VISITORS).**

## STRATEGY 4

Continually monitor and be responsive to the needs of residents and employees.

## TACTICS

1. Gather input from employees/residents, at least annually, to track how needs change and to identify emerging needs. Use the findings from this study as a baseline to benchmark and track over time. This could be through the development of a community survey, a public input forum, etc.
2. Work with developers and other partners to address needs identified by these audiences. The types of developers and partners needed will be dependent on the findings from the employee/resident input.

### ADY INSIGHTS: TOOLS

**CityVoice:** A place-based call-in system to collect community feedback on places, like vacant properties or public parks, using the telephone.

**Textizen:** A survey tool that uses text messaging to collect feedback about key issues.

**MuniciPal:** MuniciPal surfaces upcoming public decisions based on geography, and allows residents to give feedback to their local representatives.

More information here: <https://www.codeforamerica.org/practices/civic-engagement>

# Economic Development Strategic Plan

## GOAL 4: LEVERAGE ADDISON'S QUALITY OF PLACE TO SUPPORT ITS "PEOPLE" AUDIENCES (RESIDENTS, EMPLOYEES, VISITORS).

### STRATEGY 5

Retain and grow Addison's existing base of commercial and retail businesses to continually enhance Addison's quality of place.

### TACTICS

1. Starting with a list of all of Addison's commercial and retail businesses, prioritize for business retention and expansion activities based on various factors, such as risk, economic impact, etc. Meet regularly with those high priority businesses to keep a pulse on their needs and challenges, and consider using a survey to monitor the needs of those businesses that you are not able to visit with in-person.
2. Use resident input from Strategy 4 to determine where there are gaps in the types of retail and commercial businesses they would like to see in Addison.
3. Help support local retail and hospitality business owners through promoting business networking events that use their services.
4. Continually monitor potential incentive programs that will help improve the aesthetic appeal of aging commercial centers. (i.e. PACE Programs, façade/remodel incentive programs, etc.)
5. Explore opportunities to work with retail properties to activate and program parking lots, especially for aging and/or struggling locations to provide a more engaging experience through improved aesthetics, connectivity to adjacent properties, and ongoing activities and events that can drive traffic to these locations, provide additional revenue opportunities (i.e. food trucks, or monetized events) and retain customers at the location for longer periods of time for each visit.

### ADY INSIGHTS

**DeSoto, TX.** "Grow DeSoto" reimagined the aesthetic look and feel, and the physical functionality of an aging commercial strip center. By providing a more inviting, pedestrian friendly experience with a focus on local business, new economic and social vitality was created from what had been a dying shopping center.



Thank You!