An Update on Accelerating the Growth of the Life-Science Sector in Novato
Table of Contents

- Research
- Findings
- Positioning and Messaging
- Goals and Objectives
- Target Audiences
- Strategy and Tactics
- Additional Services
Market Research

- Conducted directional research to provide guidance for positioning and messaging development

- Primary research consisting of in-person interviews, one-on-one phone interviews and an online survey

- Review of secondary research, competitive biotech cluster materials, articles and presentations
Key Findings

Factors in deciding where to locate a life science business:

- Qualified workforce
- Proximity to academic institutions
- Proximity to ancillary services
- Financial motivators/incentives
- Quality of life
- Commute
- CEO
**SWOT Analysis**

**Strengths:**
- North Bay can address full spectrum of life science industry needs—research to manufacturing
- Established respected entities: Buck Institute, BioMarin and up-and-comers: Ultragenyx
- Home to 200+ life science companies and employs 1,700+ people in life science businesses
- Well educated community (potential workforce)
- Lifestyle. Access to Napa wine tasting, Tahoe skiing, culture of San Francisco, extensive outdoor space and sense of community, strong school system
- Local government and private sector commitment to supporting effort

**Weaknesses:**
- Perception of elitism
- Airport and transportation proximity
- No major academic research institution
- Expensive housing and overall cost of living
- Lack of financial incentives to motivate a move (tax break, etc.)

**Opportunities:**
- Relative proximity. If you are currently in another state (Washington, Colorado, etc.)
- Office space is relatively inexpensive (compared other Bay Area locations)
- CEOs are primary decision makers. Some already reside here
- Lack of awareness/consideration, not overt negative feelings are the current obstacle

**Threats:**
- Real estate availability. Current space not specifically built-out for life science use
- Lack of (relative) physical proximity to major academic research institutes—Stanford, Berkley, UCSF
- Limited ancillary services in the immediate area (VC, patent attorneys, marketing services, etc.)
- Commute of broader Bay Area workforce to North Bay may not be realistic
North Bay
Life Science Alliance

WHERE LIFE SCIENCE MEETS LIFE STYLE
POSITIONING STATEMENT
For emerging life science companies looking to fuel pre-clinical research and/or clinical trials, the North Bay region is the ideal location to build and grow a company, offering easy access to the vast resources within the broader Bay Area while providing an unmatched quality of life and access to existing infrastructure designed to help life science organizations meet their full potential.

CORE MESSAGES

A prospering life science environment

Access to the resources you need for success

An unmatched quality of life that fosters collaboration

A local commitment to the unique needs of life science companies

Support points
More than 200 life science companies are based in the North Bay region, attracting nearly $40 million in grant funding in 2013. In Marin County alone, life science revenues are more than $750 million and associated jobs are nearly 2,000.

There is already important research going on in the North Bay area. Founded in 1999, the Buck Institute for Aging in Novato incorporates 25 specialty labs that consistently deliver breakthroughs on disease and aging.

Founded in 1997, BioMarin has already brought a remarkable four drugs to market. BioMarin, based in the North Bay, employs 1,000 worldwide, generates $500.7 million annual revenue and has already yielded two North Bay spinoffs.

With easy access from the North Bay, the San Francisco Bay Area is the #1 Biopharma cluster in the world. With the largest amount of VC funding ($1.44 billion in 2013) and the largest number of life science jobs (110,000+).

Support points
Just 25 miles to San Francisco and roughly 50 miles to the South Bay, access to top tier academic institutions such as Stanford, UCSF, UC Davis and Berkeley are well within reach for those based in the North Bay.

With an established life science employee base in the larger San Francisco area, the prospect of a reverse commute from the City, or the opportunity to create attainable suburban life style in the strong family communities of the North Bay is a great draw for top talent.

The North Bay region’s variety of commercial real estate is typically priced significantly lower than commercial space in other parts of the Bay area.

Support points
With proximity to urban culture (San Francisco) and beautiful natural playgrounds (Napa, Lake Tahoe), and unparalleled open space, the North Bay is an attractive residence for professionals—making it an ideal location for companies who want to attract top talent interested in a non-urban environment.

The North Bay offers a strong sense of community to its residence and those who work in the area, with top schools, a breadth of restaurants and plenty of recreational space.

With 80% of the land designated as open space, the beauty of the area will be maintained and congestion will remain manageable.

Support points
Organized efforts like those of the North Bay Life Science Alliance demonstrate a strong commitment to the industry from a variety of vested parties including extensive support efforts on the part of local government.

Educational commitment to the sciences begins in the North Bay area at an elementary school age, and continues through high school and on to community colleges and respected universities.

The North Bay region provides a business-friendly environment and has no gross receipts tax that siphons money from start-ups.

The North Bay region has crafted a mutually beneficial partnership with Bay Bio, the areas premier advocate for the life science industry in the greater Bay area.

CORE PERSONALITY
Sophisticated | Innovative | Collaborative | Practical | Approachable
North Bay Life Science Alliance

Good for business
Inventing, developing, testing and manufacturing drugs are intensive processes that require specialized, high-quality infrastructure and a range of support services. When life sciences flourish, growth comes to a variety of aligned industries.

A healthy economy
High-growth industries, specialized real estate and strong subsidies all create more revenue for local and regional governments. Corresponding investment in public utilities and services will continue to boost quality of life for residents and businesses, attracting even more interest to the North Bay region and continuing to grow the tax base.

300 life-science jobs
Means 503 jobs across all industries

200 life-science jobs
Means 382 jobs across all industries

100 life-science jobs
Means 182 jobs across all industries

300 = $142m = $4m
life science jobs
In new-business
In state and local revenue

Feeling good
Life sciences improve quality of life and productivity around the world. It’s a fulfilling industry that affects bright, passionate people.
The breakthroughs emanating from the North Bay would continue to put the region on the map and give local extra reason to be proud of the work that’s done here.

Why we should • Why we can • What we’re doing about it
Landing page with downloadable brochure
Next 6 Months

- Formal launch of the NBLSA at the California Pavilion at BIO
  - Governor’s participation
  - Press activities
- Proactive marketing program
  - Robust and interactive web site
  - Direct marketing activities
  - Comprehensive public relations effort
  - Novato and North Bay tour program
  - Targeted advertising program
  - Direct sales calls by Novato’s Economic Development Manager
  - Speaking engagements at industry events, trade shows and conferences
Marketing Objectives

• Generate informed awareness
• Establish credibility and reputation
• Create and leverage valuable content
• Cultivate proactive engagement
Target Audiences

• The existing life science companies
  – Ultragenyx, BayBio, Raptor, Genentech
• Potential new businesses
• Potential financial contributors
• North Bay community leaders
• Elected officials
• Academics
• Foundations and non-profits
• Media
  – Bay Area, California, national, international, trade
• Trade organizations
• Unions
• Environmentalists
Strategy and Tactics

- Research and Positioning
  - Background research, interviews, positioning, messaging
  - Status: Completed

- Branding
  - Visual identity, logo, tagline, brand guidelines
  - Status: Completed

- Website
  - Multi-phase website design and development

- Outreach Materials
  - Fact sheet, business card, PowerPoint presentation and letterhead templates

- Industry Launch
  - BIO Conference media relations, exhibit support, press release, social media
  - June 23-27, 2014

- Direct Audience Targeting
  - Direct mailers, promotional materials
Strategy and Tactics, cont’d

• Media Relations
  – Media pitches, publication opportunities, news promotion, outreach, editorial content, case studies
• Conference Support
  – Media support, exhibit coordination, editorial and partner meetings
• Digital Marketing and Advertising
  – Social media support, paid online ads, content promotion
• Educational Outreach
  – Programming to support academic curricula in local schools and universities
• North Bay Tour Program
  – Guided tours to attract life science businesses to North Bay
• Measurement and Analysis
  – Website traffic, media coverage, public perception, Alliance participation
Additional Services

- **Paid Advertising Program**
  - Airports, BART and Caltrain stations, Muni bus wraps and outdoor billboards
- **Events**
  - CEO Summits and roundtables
- **Videos**
  - Standalone piece, educational outreach and tour program tool
- **Website Additions and Enhancements**
  - Interactive elements, dynamic graphics, etc.
- **Sponsorships**
  - Sponsorship of events designed to engage target audiences
- **Enhanced Tour program**
  - Specialized protocols designed for specific groups i.e. elected officials, potential developers, etc.
RECENT ACCOMPLISHMENTS

- Ultragenyx and XCell awarded $2.2 million in corporate income tax credits under the Governor’s new “California Competes Tax Credit” program
- Ultragenyx and XCell commit to hiring another 188 people over the next two years
- One small and one large life science company looking to relocate to the North Bay
- California’s Career Pathway awarded the North Bay School Districts over $15 million to expose children to the life sciences K-12
- New Petaluma start-up company, Synergy Health – surgical sterilization technology.
Questions?