

100 LEADING LOCATIONS for 2011

DESIRABLE PLACES
FOR DOING
BUSINESS

As business populations shift and site selection continuously evolves, smaller regional and metro areas are emerging as desirable locations for companies of all sizes. This year, in concert with *Area Development's* annual state-level Gold and Silver Shovel Awards, we also examined the performances of these locales.

We based our findings on 14 highly regarded location surveys from sources including *Forbes*, *Newgeography*, *Brookings MetroMonitor*, *Fast Company*, and *CNNMoney*. We used the findings of the Milken Institute's Best Performing Cities 2010 as the primary criterion. Each of the 100 Leading Locations on our list must appear within the top 100 rankings for large and small cities on Milken's report.

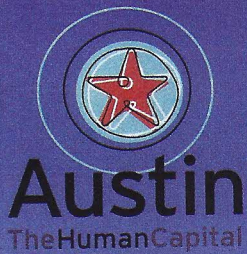
We also considered the results of our own Select Regionals Survey as a criterion to select the 100 locations that made the final cut. This survey, sent to nearly 300 U.S. regions and metros, considered the areas' top three greatest project investments of 2010, unemployment rates, and total capital investment pledged over the past year.

While our list does not rank the locales, we have chosen to highlight five that appeared on most of the lists we considered. With a total of 10 mentions across the 14 lists in our review, Austin, Texas, was the most named Leading Location. Regardless of how many lists an area appeared on, they all represent some of the best-performing locations during this recession-to-recovery period.

Please use the key below to match the cities to the respective lists on which they appear.

KEY to SURVEYS

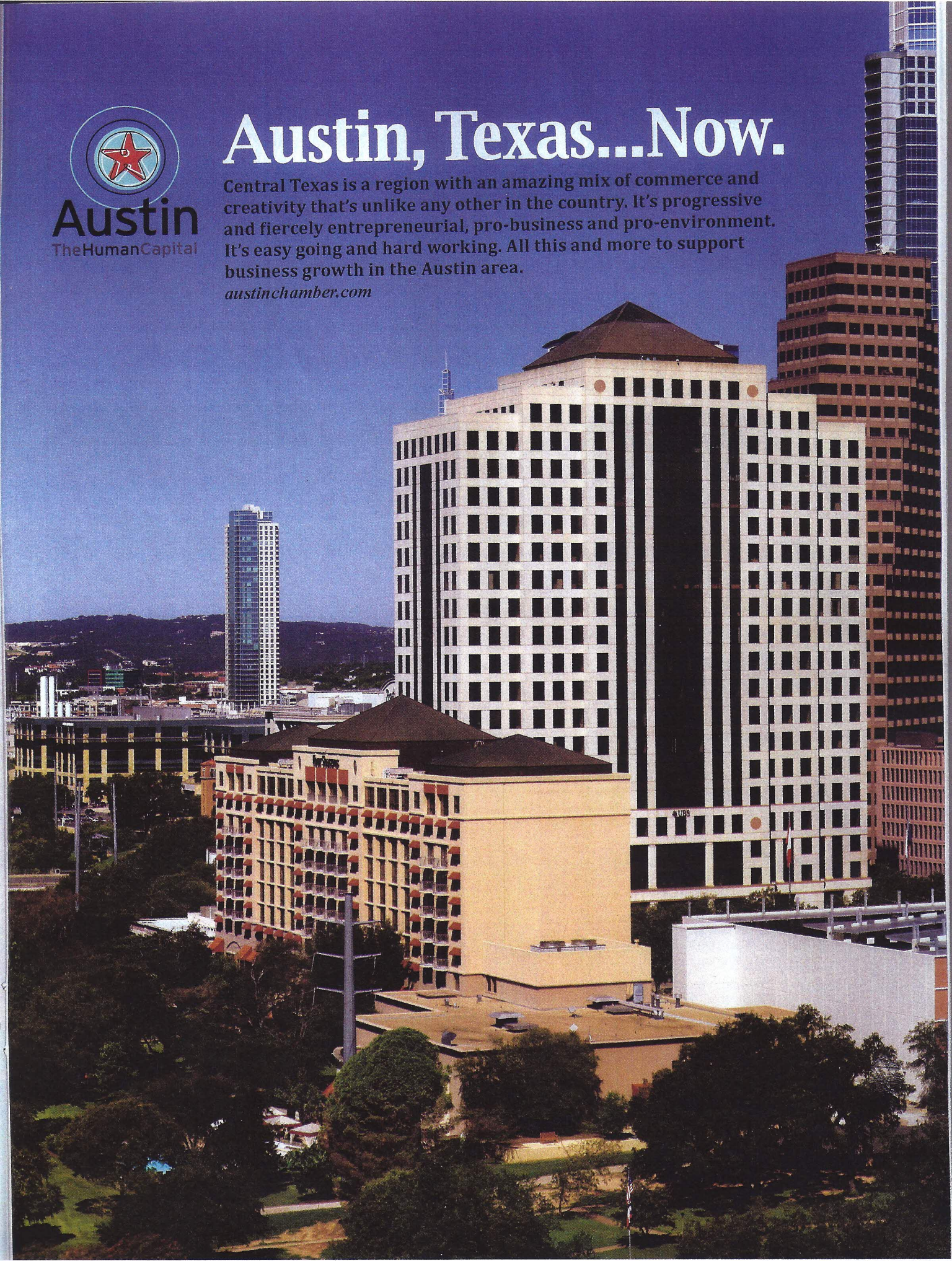
- a** *Milken Institute*: Best Performing Cities 2010
- b** *Brookings MetroMonitor*
- c** *CIO*: Top 10 Cities for Technology Jobs
- d** *Forbes*: The Best Cities for Jobs
- e** *GigaCom*: Top 10 Cities with the Best Broadband
- f** *Fast Company*: Fast Cities of 2011
- g** *Newgeography*: America's Biggest Brain Magnets
- h** *Forbes*: Best Places for Business and Careers
- i** *Relocate America*: Top 10 Recovery Cities for 2010
- j** *Newgeography*: Best Cities for Job Growth (Top 25)
- k** *Forbes*: America's Most Innovative Cities
- l** *CNNMoney*: Best Places to Live
- m** *Forbes*: Most Wired Cities
- n** *Area Development*: Select Regionals Survey



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1ST On 10 Surveys Austin, Texas

a b d f g h i j k m

As the capital of the Lone Star State — itself well known for its business-friendly policies — **Austin** stands out. For companies large and small, the metro area has been a sound choice for expansions and relocations. And its businesses consistently push boundaries, creating high-tech and cutting-edge innovations that, in turn, spur even more investment.

Samsung's announcement of a \$3.6 billion investment in its Samsung Austin Semiconductor (SAS) plant was the year's biggest news, according to Dave Porter, senior vice president of economic development for the Greater Austin Chamber of Commerce. SAS will increase the capacity of its 12-inch semiconductor fabrication facility in the city, creating up to 500 permanent jobs.

"This investment, along with the creation of Samsung Austin Semiconductor's first research and development entity this spring, makes the Austin campus a true semiconductor complex and ensures Austin's premier status as a center for semiconductor research and manufacturing," said Dr. W. S. Han, SAS president.



Austin's robust tech work force will fulfill these jobs. According to the Census, the area has the sixth most educated work force in the nation. Porter says its highly educated potential employees are the top reason companies choose to relocate and grow in Austin. Many workers filter into the city's labor pool via the University of Texas at Austin, the state university system's flagship school, which has more than 48,000 students.

While Austin leads today, success didn't happen overnight. The chamber developed Opportunity Austin, a strategic plan to diversify the area's economy, in 2004 after the 2000–2002 tech bust, which impacted Austin's software and semiconductor businesses. Focusing on attracting clean energy companies, life science firms, creative media, and niche headquarters has strengthened Austin's economy. For instance, Hanger Orthopedics moved its headquarters to the city last year, bringing 280 jobs with it. "That's the perfect fit we're looking for," Porter says.

Today, industry group BioAustin represents approximately 100 life sciences companies that employ more than 7,000 people in Austin and central Texas. These businesses span fields from medical device manufacturing to agricultural biology.

Aggressive incentives and business-friendly taxes are just two more reasons why companies locate here. State business taxes are relatively low and local incentives range from tax abatement to public utility incentives and foreign-trade zones.

But one of the single most important strategies Austin has implemented is encouraging local CEOs to talk to other executives about the benefits of relocating to the area.

"It's not brain surgery," Porter says. "It just comes down to building relationships."

Looking forward, the chamber is working on the second phase of Opportunity Austin, a five-year plan that runs from 2009–2013. The goal is to attract 117,000 net new jobs that represent a nearly \$11 billion wage increase. Based on its success over the past decade, Austin is poised to continue its economic ascent.

On 8 Surveys

Denver, Colorado

a b e f g h j m

Seattle, Washington

a c f g h i k m

On 7 Surveys

Raleigh-Durham Area, North Carolina

a b g h j k m

On 6 Surveys

Boston, Massachusetts

a c f j k m

Charlotte, North Carolina

a b f h m n

Dallas, Texas

a b c d f j

Oklahoma City, Oklahoma

a b e f j n

San Antonio, Texas

a b d h i j

On 5 Surveys

Houston-Sugar Land-Baytown, Texas

a d f j n

Lincoln, Nebraska

a d f h j

New York Metro Area

a c e f j

Pittsburgh, Pennsylvania

a b e j n

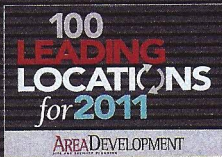
Salt Lake City, Utah

a b h j n

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DEVELOPMENT

Lori Huguley, CEcD • Director
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On 4 Surveys

Albuquerque, New Mexico

a b i j

Anchorage, Alaska

a d f j

Baltimore-Towson, Maryland

a b f m

Bismarck, North Dakota

a d h j

Bloomington, Indiana

a d h j

Boulder, Colorado

a f h i

College Station-Bryan, Texas

a h j n

Colorado Springs, Colorado

a h m n

On 3 Surveys

Ames, Iowa

a h j

Augusta Area, Georgia

a b j

Baton Rouge, Louisiana

a d j

Bethesda-Rockville-Frederick, Maryland

a j m

Buffalo-Niagara Falls, New York

a j n

Charleston, South Carolina

a b j

Corpus Christi, Texas

a d j

Council Bluffs, Iowa

a d j

Des Moines-West Des Moines, Iowa

a d j

Columbia, Missouri

a h i n

Durham, North Carolina

a d h j

El Paso, Texas

a b d j

Fargo, North Dakota

a d h j

Huntsville, Alabama

a h i j

Little Rock-North Little Rock-
Conway, Arkansas

a b j n

McAllen-Edinburg-Mission, Texas

a b i j

Omaha, Nebraska

a d h j

San Diego, California

a k g m

Fayetteville, Arkansas

a h j

Fayetteville, North Carolina

a d j

Fort Collins, Colorado

a h j

Fort Worth-Arlington, Texas

a d j

Hartford Area, Connecticut

a b j

Honolulu, Hawaii

a b j

Iowa City, Iowa

a h j

Jacksonville, North Carolina

a d j

Kansas City, Missouri

a g j

Kennewick-Richland-Pasco, Washington

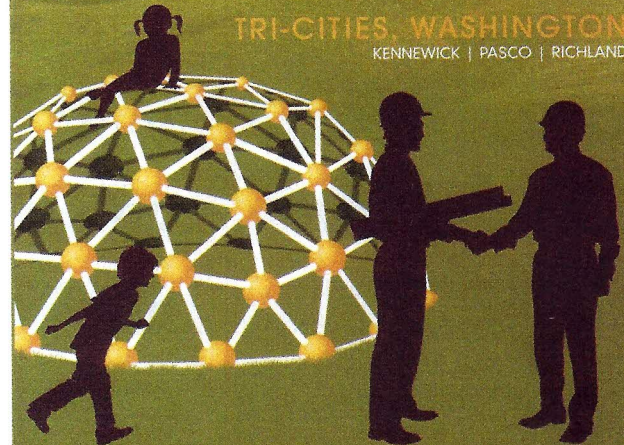
a d j



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**100
LEADING
LOCATIONS
for 2011**

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WASHINGTON**
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On 3 Surveys

Killeen-Temple-Fort Hood, Texas
a d j

Lafayette, Louisiana
a d j

Las Cruces, New Mexico
a d j

Lawton, Oklahoma
a d j

Lexington, Kentucky
a h j

Logan, Utah
a d h

Louisville, Kentucky
a b j

Morgantown, West Virginia
a h j

Nashville-Davidson-Murfreesboro-Franklin, Tennessee
a g m

Philadelphia, Pennsylvania
a c j

Provo, Utah
a k h

Ogden, Utah
a h j

St. Louis, Missouri
a h n

St. Joseph, Missouri
a d j

Sioux Falls, South Dakota
a f h

Springfield, Missouri
a j n

Virginia Beach-Norfolk-Newport News, Virginia
a j n

Yakima, Washington
a d j

On 2 Surveys

Albany-Schenectady-Troy, New York
a j

Amarillo, Texas
a n

Auburn-Opelika, Alabama
a h

Brownsville-Harlingen, Texas
a j

Cedar Rapids, Iowa
a h

Charlottesville, Virginia
a h

Cheyenne, Wyoming
a n

Columbia, South Carolina
a b

Greenville, South Carolina
a h

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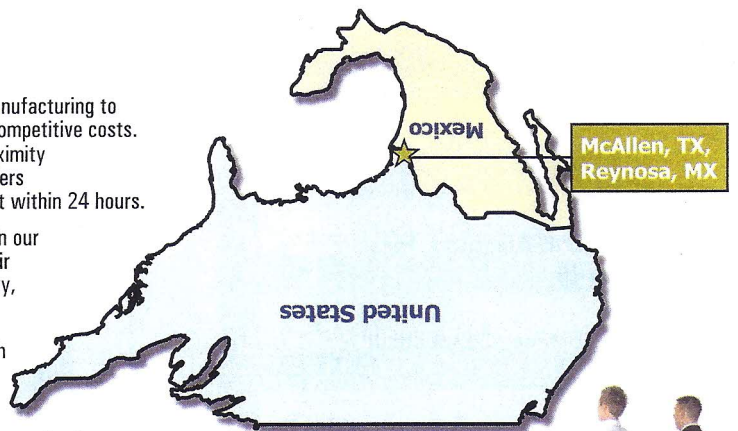
Many large and medium-sized companies are already located in our world-class industrial parks and have substantially curbed their production costs. With over 24 years of manufacturing history, the workforce is also well-trained and abundant.

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100 LEADING LOCATIONS for 2011
 AREA DEVELOPMENT

McAllen MSA, Texas - Ranked one of 100 Leading Locations for 2011

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McALLEN

Hanford-Corcoran, California
a j

Harrisburg-Carlisle, Pennsylvania
a j

Hattiesburg, Mississippi
a j

Hinesville-Fort Stewart, Georgia
a j

Ithaca, New York
a j

Jackson, Mississippi
a b

Knoxville, Tennessee
a b

Madison, Wisconsin
a k

Nassau-Suffolk Counties, New York
a j

Pascagoula, Mississippi
a j

Pueblo, Colorado
a j

Rapid City, South Dakota
a h

Rochester, New York
a j

Salem, Oregon
a j

Savannah, Georgia
a f

Shreveport-Bossier City, Louisiana
a j

Spokane, Washington
a n

State College, Pennsylvania
a j

Syracuse, New York
a j

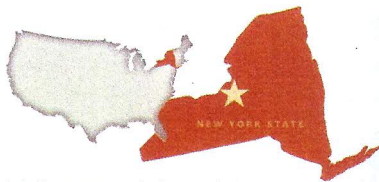
Tallahassee, Florida
a j

Trenton-Ewing, New Jersey
a j

Tulsa, Oklahoma
a b

Warner Robins, Georgia
a j

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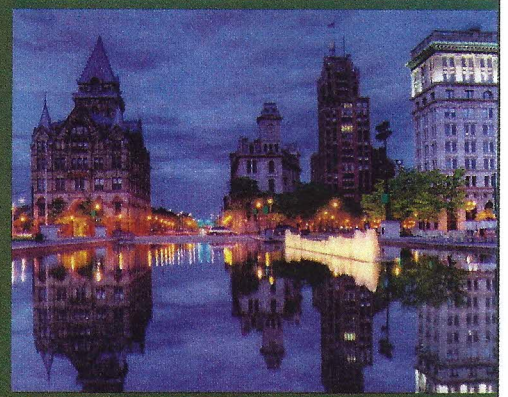
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for 2011

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SOME SPECIAL MENTIONS

We have chosen to highlight five metros in the top nine. Over the past year, many rankings — judging everything from tech prowess to labor force — have mentioned Austin. The Texas capital topped our list with ten mentions across the 14 rankings we considered.

The next eight cities received between six and eight mentions on these surveys. We have chosen to call out Denver; the Raleigh-Durham area; San Antonio; and Oklahoma City for their unique economic strengths, a range of industry specialties, work force populations, and types of investment.



DENVER



RALEIGH-DURHAM



San Antonio



Oklahoma City

DENVER

Denver received eight mentions on the 14 lists in our review. In 2010, Denver attracted a slew of major business investments, particularly in its robust energy cluster. (Direct employment growth in the cleantech sector from 2009 to 2010 was 7.1 percent, versus 0.8 percent for the overall United States.)

Vestas, the global wind energy and turbine company, selected the Mile High City for its first North American manufacturing complex. What began as an initial project for one plant morphed into four facilities across a new campus, representing an approximately \$1 billion investment. Three of the four plants went online over the past year.

And the German SMA Solar Technology, which captures 40 percent of the solar inverter

C SAN ANTONIO EXPRESS-NEWS

BUSINESS

S.A. WINS 1,400 MEDTRONIC JOBS. PAGE 2C

Forbes

San Antonio among favorite cities in which to live.

SAN ANTONIO BUSINESS JOURNAL

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market, located its North American manufacturing in Denver. Plus, "the supply chains follow them," says Laura Brandt, manager of economic development for the Metro Denver Economic Development Corp.

RALEIGH-DURHAM AREA

With seven mentions, this North Carolina region is typically referred to as the Triangle for the locations of its anchoring cities — Raleigh, Durham, and Chapel Hill — and globally-known Research Triangle Park, the largest U.S. research park.

By developing traditional and emerging clusters, the Raleigh area avoided the recession's boom-and-bust. Its life science, biotech, and pharmaceutical sectors are developing medical device and healthcare records

software niches.

Software and IT are also important. When Kenneth Atkins, executive director of Wake County Economic Development, is asked to name the area's biggest economic development project of the year, he says, "That's easy." In January, Red Hat, the largest maker of open-source software in the world, said it would build a new, \$100 million corporate headquarters and create 560 new jobs, likely to be filled by highly educated employees from nearby Duke University and North Carolina State. "That's a key reason," Atkins says of the region's success. "This area is so talent-rich."

SAN ANTONIO

Boston, Charlotte, Dallas, Oklahoma City, and San

Antonio all received six mentions. San Antonio, the seventh-largest U.S. city, is noted for offering big metro advantages at relatively low cost.

"All those savings in this day and time are very important in corporate America," says Mario Hernandez, president of the San Antonio Economic Development Foundation. Businesses choose San Antonio not only for the savings, but also for its top-quality power through municipally-owned CPS Energy, and its young, one-million-strong work force.

Over the past two years, San Antonio attracted nearly 9,000 jobs during one of the worst global financial crises. "For us to be adding these kinds of job-producing investments in a recession says a lot for the sta-



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National recognition is business as usual around here. Rated America's 4th-strongest economy, 7th-best place for jobs and 6th geekiest city, it's easy to see why Conway is the new home for companies like Hewlett-Packard and Southwestern Energy, which have resulted in \$70 million in new payroll and 1,800 new jobs. With a young, educated workforce, available sites and city structure that can get things done, you'll find a lot of reasons to plant your roots here.



CONWAY
GETSMART

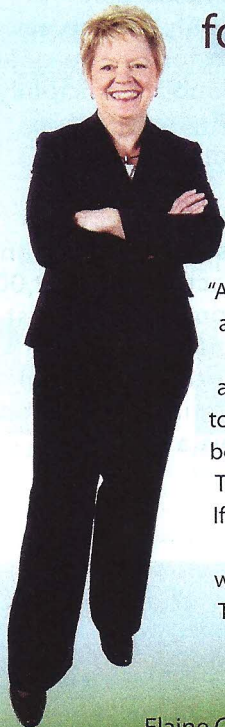
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Chief Executive

Providence Sacred Heart

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bility and potential for growth here," Hernandez says.

In 2010, Petco announced it would move its company's financial operations to San Antonio, along with 600 jobs paying an average annual salary of \$57,000. There are also the metro's growing healthcare, bioscience and biotech, IT, and aerospace sectors. Its cyber security niche attracted the 24th Air Force, a new U.S. Air Force division focused on cyber command security. Looking ahead, San Antonio seeks to grow its green jobs and renewable energy, cyber security, bioscience, and aerospace industries.

OKLAHOMA CITY

Oklahoma City distinguished itself for its financial and employment strength both during and after the recession. Over the past two years, its average unemployment rate was one of the lowest in the nation at 6.1 percent, at least three percentage points below the national average. The municipality has very little debt and has retained a Triple A bond rating, the highest rating available. While the city wasn't immune to the recession's effects, it continued to perform well during tough times. Transportation options, access to market, and growth in industries such as aerospace and bioscience, have attracted expansions.

In 2010, Boeing said it would relocate 550 jobs to Oklahoma City, and energy company Continental Resources announced a headquarters relocation to the metro. The local government's financial stability is also an important signal to businesses.

"It makes it a lot easier for companies to be successful when you're in that kind of environment," says Robin Roberts Krieger, executive vice president of the Greater Oklahoma City Chamber. That fiscal soundness helped the chamber bring 90 projects and more than 4,100 jobs to Oklahoma City last year, at an investment value of at least \$345 million.

Locations to Watch in 2011

While some of the following locations may not have made the 100 Leading Locations survey for 2011, we expect them to be strong candidates for next year's ranking lists due to their attraction of significant business investments and job creation, as well as their positive economic outlooks. Based on responses to Area Development's Select Regionals Survey, here are 30 locations to watch in the coming year.

ARKANSAS

Little Rock (100 Leading Locations)
 • Southwest Power Pool, Corporate headquarters, \$62M, 200 jobs
Pine Bluff
 • Evergreen Packaging, Liquid packaging board and coated publication paper mill, \$53M

FLORIDA

Jacksonville
 • Mercedes-Benz, Distribution and car dealer support, \$24M, 160 jobs
Space Coast
 • Midair USA, Aircraft MRO and refurbishment, \$28M, 450 jobs

INDIANA

Huntington
 • Continental Structural Plastics, Auto parts manufacturing, \$9.1M, 350 jobs
Indianapolis
 • Dow AgroSciences, Headquarters expansion, \$340M, 577 jobs

KENTUCKY

Louisville
 • Ford, Auto manufacturing, \$600M, 1,800 jobs

LOUISIANA

Baton Rouge
 • Point Bio Energy, Wood pellet plant, \$100M, 100 jobs
New Orleans
 • Nucor, Iron and steel production, \$3.4B, 1,250 jobs *1

MICHIGAN

Livonia
 • A123 Systems, Advanced battery manufacturing, \$132M, 3,000 jobs *2

MINNESOTA

St. Paul
 • J&J Distributing, Produce distribution, \$8.5M, 150 jobs

MISSOURI

Columbia (100 Leading Locations)
 • IBM, IT service delivery center, 800 jobs
Moberly
 • Mamtek, Food processing, \$46M, 600 jobs
Springfield (100 Leading Locations)
 • Expedia.com, Office, \$7.6M, 500 jobs

NEW MEXICO

Clovis
 • Tres-Amigas Superstation, Electrical grid interconnect, \$300M, 60 jobs

NEW YORK

Buffalo-Niagara (100 Leading Locations)
 • Galvstar, \$25M, Steel plant, 55 jobs

NORTH CAROLINA

Charlotte (100 Leading Locations)
 • Siemens Energy, Gas turbines, \$170M, 825 jobs
Holly Springs, Wake County
 • Novartis, R&D, \$40M, 150 jobs
Winston-Salem
 • Caterpillar, Heavy-duty vehicles, \$426M, 500 jobs

OHIO

Columbus
 • Accel, Packaging manufacturing, \$17.5M, 400 jobs

OKLAHOMA

Oklahoma City (100 Leading Locations)
 • Nash Finch, Food warehouse/distribution, \$24 million, 200 jobs

PENNSYLVANIA

Pittsburgh (100 Leading Locations)
 • Range Resources Corporation, Regional headquarters, \$35M, nearly 600 jobs

SOUTH CAROLINA

Anderson County
 • First Quality Tissue, Paper manufacturing, \$1B, 1,000 jobs
Newberry
 • Caterpillar, Facility expansion, \$15M, 500 jobs

TENNESSEE

Chattanooga
 • Amazon.com, Fulfillment center, \$91M, 1,249 jobs

TEXAS

Amarillo (100 Leading Locations)
 • Bell Helicopter Textron, Military aircraft assembly, \$31M, 459 jobs

VIRGINIA

Salem, Roanoke area
 • Yokohama Tire, Tire manufacturing, \$13M, 50 jobs

WASHINGTON

Grant County
 • SGL Automotive Carbon Fibers, Carbon fiber manufacturing, \$100M, 80 jobs
Spokane (100 Leading Locations)
 • Aerospace cluster, Spokane International Airport, \$5M, 90 jobs

WYOMING

Cheyenne (100 Leading Locations)
 • NCAR Wyoming Supercomputer Center (NWSC), Federally-funded supercomputer research center, \$92M, 35 jobs

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