Combined Ratings* of 2012 Factors

FIGURE 30 — Corporate Survey 2012

Site selection factors — Ranking	2012	2011
1. Labor costs	90.8	88.4 (2)**
2. Highway accessibility	90.1	93.8 (1)
3. Availability of skilled labor	89.4	88.4 (2T)
4. Availability of advanced ICT services	85.1	76.6 (13)
5. Occupancy or construction costs	82.8	85.9 (5)
6. Energy availability and costs	81.3	84.8 (7)
7. Corporate tax rate	79.3	86.0 (4)
8. Available buildings	78.4	76.3 (15)
9. Tax exemptions	75.4	83.6 (8)
10. Low union profile	73.5	81.0 (10)
11. Right-to-work state	72.6	77.5 (12)
12. Proximity to major markets	72.2	83.0 (9)
13. State and local incentives	71.1	85.9 (5T)
13T. Environmental regulations	71.1	76.4 (14)
15. Expedited or "fast-track" permitting	67.2	72.4 (17)
16. Inbound/outbound shipping costs	63.7	79.2 (11)
17. Availability of long-term financing	63.1	70.0 (18)
18. Available land	59.0	73.9 (16)
19. Proximity to suppliers	54.9	67.8 (19)
20. Training programs	54.7	50.6 (23)
21. Accessibility to major airport	52.9	55.7 (21)
22. Proximity to technical college/training	50.3	40.2 (24)
23. Raw materials availability	49.7	52.8 (22)
24. Railroad service	43.6	33.6 (25)
25. Availability of unskilled labor	42.9	58.9 (20)
26. Waterway or oceanport accessibility	19.9	24.5 (26)
Quality-of-life factors — Ranking		
1. Low crime rate	79.3	82.0 (1)
2. Healthcare facilities	69.8	71.0 (2)
2T. Housing availability	69.8	64.1 (5)
4. Housing costs	66.9	69.9 (3)
5. Ratings of public schools	63.3	68.8 (4)
6. Colleges and universities in area	61.6	56.6 (6)
7. Climate	55.0	52.2 (8)
8. Recreational opportunities	52.9	53.2 (7)
9. Cultural opportunities	48.9	42.8 (9)

*All figures are percentages and are the total of "very important" and "important" ratings of the *Area Development* Corporate Survey and are rounded to the nearest tenth of a percent.
**(2011 ranking)

27th Annual Survey of Corporate Executives: Changing Site Selection Priorities

Although the survey results show no dramatic upswings in new facility or expansion plans, there are noted changes in site selection priorities – perhaps as a result of the lackluster economic recovery.

FIGURE 29

Corporate Survey 2012*

Site selection factors	Very Important %	Important %	Minor Consideration	Of No Importance %
Labor				
Availability of skilled labor	53.9	35.5	7.1	3.5
Availability of unskilled labor	10.0	32.9	33.6	23.6
Training programs	18.0	36.7	33.1	12.2
Labor costs	42.6	48.2	5.7	3.5
Low union profile	47.1	26.4	11.4	15.0
Right-to-work state	45.8	26.8	13.4	14.1
Transportation/ Telecommunications				
Highway accessibility	57.0	33.1	6.3	3.5
Railroad service	27.1	16.5	21.2	35.3
Accessibility to major airport	17.4	35.5	30.4	16.7
Waterway or oceanport accessibility	5.9	14.0	25.0	55.1
Availability of advanced ICT services	49.3	35.8	11.4	3.6
Finance				
Availability of long-term financing	31.9	31.2	20.6	16.3
Corporate tax rate	35.7	43.6	11.4	9.3
Tax exemptions	32.6	42.8	15.2	9.4
State and local incentives	33.1	38.0	21.1	7.7
Other				
Available buildings	41.7	36.7	14.4	7.2
Available land	18.7	40.3	22.3	18.7
Occupancy or construction costs	35.3	47.5	11.5	5.8
Expedited or "fast-track" permitting	29.2	38.0	22.6	10.2
Raw materials availability	19.3	30.4	25.9	24.4
Energy availability and costs	35.3	46.0	12.2	6.5
Environmental regulations	31.2	39.9	18.8	10.1
Proximity to major markets	32.1	40.1	18.2	9.5
Proximity to suppliers	15.8	39.1	30.8	14.3
Inbound/outbound shipping costs	26.7	37.0	18.5	17.8
Proximity to technical college/training	15.3	35.0	27.7	21.9
Quality-of-life factors				
Climate	18.6	36.4	37.9	7.1
Housing availability	15.8	54.0	23.0	7.2
Housing costs	19.4	47.5	25.9	7.2
Healthcare facilities	19.4	50.4	25.2	5.0
Ratings of public schools	21.6	41.7	29.5	7.2
Cultural opportunities	10.8	38.1	41.0	10.1
Recreational opportunities	11.0	41.9	38.2	8.8
Colleges and universities in area	17.4	44.2	33.3	5.1
Low crime rate	31.4	47.9	18.6	2.1

*All figures are percentages and are rounded to the nearest tenth of a percent.

The 27th Annual Corporate Survey

FIGURE 1

Manufacturing — Durable Goods	22%
Manufacturing — Non-Durable Goods	5%
Manufacturing — Other	13%
Distribution & Logistics	7%
Warehousing Services	2%
Data Center/Processing/Software/ Other Computer-Related Services	5%
Financial Services/Insurance	4%
Real Estate	7%
Energy Industry	1%
Hospitality Industry	1%
Healthcare Industry/Life Sciences	3%
Retail	1%
Construction & Engineering	10%
Other	18%

Figure 2 - Respondent's Title (2 of 44)

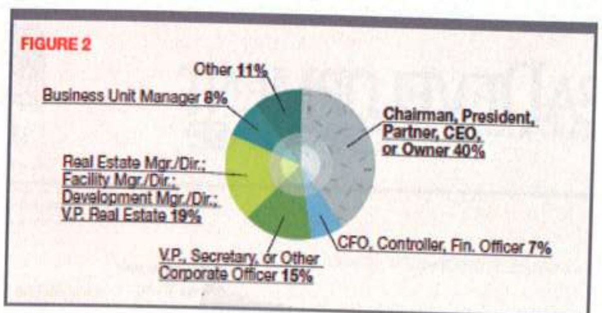
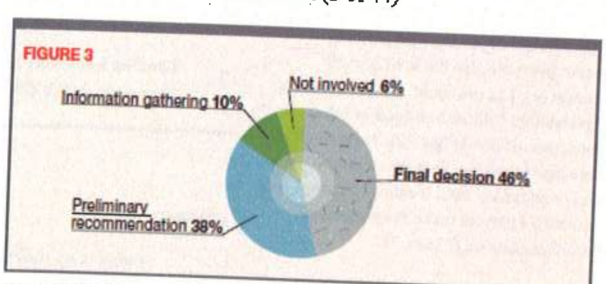


Figure 3 - Primary Role in Company's Location Decisions (3 of 44)



Nearly half of the respondents say they are responsible for their companies' final location decisions, and another 38 percent make the preliminary recommendations.