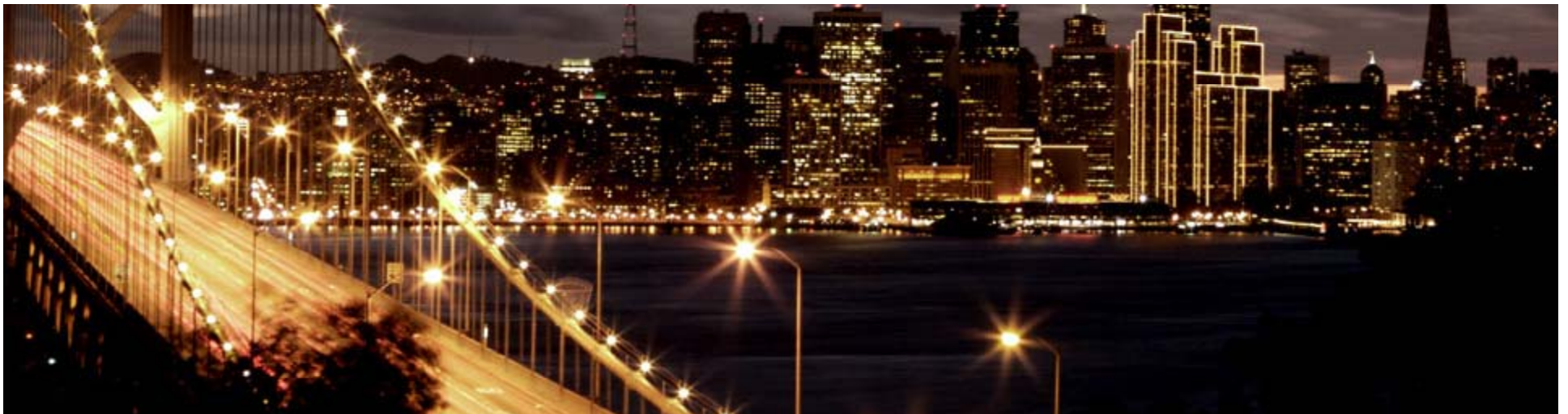




ATLAS ADVERTISING

communications + technology for world landmarks



About Atlas Advertising



Atlas Advertising helps economic developers reach national and international prospect and site selection audiences. We deliver branding, website development, GIS mapping, research, and creative services professionally and with a staff experienced in economic development. Unlike firms with little or no economic development experience, Atlas Advertising uses a proven mix of economic development marketing tactics that generate interest from site selection audiences.

Atlas Advertising is led by a former economic development practitioner and has worked with 48+ different economic development clients in 26 states. Our approach and experience means that our campaigns generate an average of three to ten times the response of other campaigns.

Featured clients:

- State of Ohio
- Indy Partnership
- City of San Francisco
- Greater Phoenix Economic Council
- Greater Omaha Economic Development Partnership

Agenda for today's meeting



1. Introductions
2. Overview of today's economic development climate
3. Overview of today's corporate relocation climate
4. Results of Atlas' 2009 survey of site selectors and companies
5. What this means for you as economic development marketers
6. Summary: Ten things you should be doing today

Overview of today's economic development climate



- Most economic developers reporting reduced prospect activity
- Many turning to retention and economic gardening
- Nearly all are facing budget shortfalls or reductions
- Many are cautious as a result
- Many have not taken the mantle of “this is our time to make a difference.”

Overview of today's corporate relocation climate



- Many companies in survival mode, or are consolidating
- Some recent activity in mergers and acquisitions also driving consolidation
- Companies are tremendously cost conscious
- Some industries continue strong, bucking the trends
- Nearly all companies are constrained by lack of debt financing
- Incentives are playing a bigger role

Atlas' 2009 Survey of Site Selectors and Companies

Survey methodology



- Conducted by phone in February
- Totaled 28 site selectors and corporate relocation professionals in 15 states and two countries
- Used to detect trends that our clients can leverage in their planning
- Data should be treated as directional, rather than statistically significant.

What Industries are Most Actively Expanding or Relocating Today?



Industries	Percentage of Responses
Healthcare	22%
Alternative Energy	22%
Government	11%
Education	8%
Pharmaceuticals	6%
Consumer Products	3%
Financial	3%
Manufacturing	3%
Aerospace	3%
None	3%
Digital Media	3%
Call Centers	3%
Billing/Collections	3%
R&D	3%
Construction	3%
Infrastructure	3%

What Events are Spurring Expansion or Relocation Today?



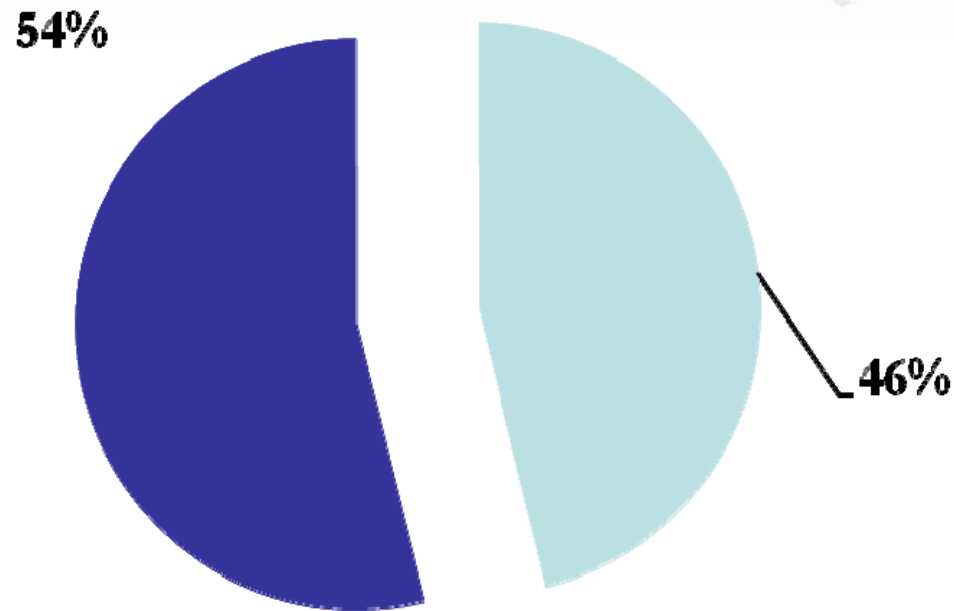
Important Factors	Percentage of Responses
Economy	24%
Not A Lot	12%
Trying on a Small Scale	12%
M&A	12%
Stimulus	8%
Cost Cost Efforts	8%
Consolidation of Offshore Companies	4%
Reorganizations	4%
Global Audience is Moving	4%
Small Businesses Looking to Get Ahead	4%
More Competition	4%
Lease Expirations	4%

What are the Top Five Decision Making Criteria for your Clients in Selecting a Location Today?



Decision Making Criteria	Percentage of Responses
Ability to Recruit Qualified Workforce	18%
Cost of Doing Business	16%
Business Incentives	13%
Access to Transportation/Infrastructure	11%
Quality of Life	7%
Excellent Real Estate Options	6%
Favorable Tax Climate	6%
Access to Customers	5%
Cost of Living	5%
Business Friendly Government	3%
Highly Ranked Schools	2%
How Saturated is Current Market	2%
Vibrant Downtown	1%
Weather	1%
Population Growth	1%
Unemployment	1%
Green	1%

Have These Criteria Changed Over the Past 12 Months?



■ Yes ■ No

If “Yes”, How Have The Criteria Changed?



Incentives matter more now

Considering Moves To Less Expensive
Places Now

Green is Less Important Right Now

EVERYTHING IS MORE
COMPETITIVE NOW

Less About Labor, More About \$

Finances Are At The Head Of The Table

What Cities in the United States have Consistently Stood Out as the Top Cities for a Relocation or Expansion?



Cities	Percentage of Responses
Albuquerque	11%
Dallas	11%
Nashville	8%
Atlanta	8%
Phoenix	6%
Jacksonville	6%
San Antonio	6%
Austin	6%
Denver	6%
Charlotte	3%
Northern Kentucky	3%
St. Louis	3%
Oklahoma City	3%
Houston	3%
Tampa	3%
Tucson	3%

What Was the Most Important Thing an Economic Development Organization Did For You in 2008?



Contributions	Percentage of Responses
Concise and Informative Data	30%
Fast, Responsive	14%
Provided Incentives	12%
Provided Clear Branding/Differentiators	12%
Hosted all Site Visits	7%
Prepared Professionally	5%
Networking Opportunities	5%
Maintained Confidentiality	5%
Demonstrated Expertise	5%
Stopped Sending Printed Materials	2%
Valuable Website	2%
Threw Land in the Deal	2%

What Advice Can You Give EDO's today?



Stick To The Basics

Keep It Clean

ED is about Networking, Get Out Of Your Office

Do Something Outrageous

Focus On Retention

BE PREPARED WITH ALL THE
FACTS

Be experts in your targeted industries

Provide Valuable Incentives

Don't Overstate The Situation

Buy Land And Give It Away

Is There Anything Else That Would Be Useful for an EDO to do?



Offer New Buildings

Lower our Capital Investment

20% OF INCENTIVES ARE USED
80% OF THE TIME

Provide Quick Loading GIS Data

Show me the **money**

Be The Coordinator Throughout The Process

How Important are each of the Following as Sources of Information when Learning about a Community?



Sources of Information	Average Score
Site Visits	4.05
Community Websites	2.85
Existing Relationships w/ ED Clients	2.60
Past Experiences	2.55
National Conferences	2.55
National Data Services	2.50
Community GIS Websites	2.50
Word of Mouth/Peers	2.15
Calls From Local Officials	1.95
Newspaper Articles	1.85
Email Campaigns/Newsletters	1.75

Scored on a 5 point scale.

When Researching Communities Prior to a Site Visit, How Much of Your Efforts are Spent Reviewing National Data Sources That You Own?



- The average is 25%.
 - With a high of 80% and a low of 0%.

When Researching Communities Prior to a Site Visit, How Much of Your Efforts are Spent on the Internet Using Community Websites?



- The average is 22%.
 - With a high of 70% and a low of 0%.

When Researching on the Internet, What Websites Have You Found to be the Most Useful?



Website	Percentage of Responses
Co-Star	20%
CIA	7%
Real Cap Investments	7%
Oklahoma City	7%
Iowa	7%
South Carolina	7%
Dallas	7%
US Census	7%
grants.gov	7%
Gartner	7%
Fab Futures	7%

What About These Websites Made Them Valuable To You?



Important Factors	Percentage of Responses
Strong Data Sections	29%
Contact Information	15%
Brand Story/Differentiators	12%
List of Major Employers	12%
Easy to Navigate	9%
News/Updates	9%
Financial Models	3%
List of Available Properties	3%
Available Incentives	3%
Target Industries	3%
Tax Data	3%

What this means for you as
economic development marketers

Truths today



1. Companies and site selectors have access to national data sets that enable them to do an initial screen of 30 to 50 cities in an afternoon. From there, they do a “deep dive” on three communities.
2. Don’t always assume that your community is being considered as part of the 40-50.
3. Do assume that virtually every prospect that interacts with you is a live one – you are in the final three
4. Don’t always assume that you are easy to find in your community
5. Your website will get 10 to 20 times the interactions that you will
6. When you are contacted, it is worth your while to put your best foot, and your best staff, forward.

How you can calibrate your marketing to connect with companies or site selectors when they need you



COMPANY ACTIONS

ED ACTIONS

Consistent business evaluation and assessment



Familiarization tours, email, public relations

Formulating Objectives / Defining search area



Relevant branding that gets you on the list

Evaluating Locations



Websites and search marketing that connect and educate

Field Visitations



Professional site visits and answering when called

Selecting a Community



Engaging the business community

Familiarization tours, in person and virtually



- Objective: Engage prospects and site selectors directly
- Tactics
 - In person tours – easier to recruit for today
 - Virtual tours/webinars – 95% cheaper per contact.



Direct Outreach, circa 2009



- Objective: Engage prospects and site selectors directly
- Tactics
 - Develop your LinkedIn Network
 - Slide share monthly
- Quick assessment:
 - How many people are your 1st degree connections?
 - What percentage of those are local?
 - How well are you accessing the networks of your local stakeholders?
 - Do your connections reach the markets you target?



Your Network of Trusted Professionals

You are at the center of your network. Your connections can introduce you to 2,489,100+ professionals — here's how your network breaks down:

1 Your Connections Your trusted friends and colleagues	464
2 Two degrees away Friends of friends; each connected to one of your connections	37,100+
3 Three degrees away Reach these users through a friend and one of their friends	2,451,400+
Total users you can contact through an Introduction	2,489,100+

7,355 new people in your network since April 24

The LinkedIn Network

The total of all LinkedIn users, who can be contacted directly through InMail.

Total users you can [contact directly](#) — [try a search now!](#)

35,000,000+

More About Your Network



REGIONAL ACCESS

Top locations in your network:

18%		1. Greater Denver Area
13%		2. San Francisco Bay Area
6%		3. Greater New York City Area
4%		4. Greater Los Angeles Area
3%		5. Washington D.C. Metro Area

Your region: Greater Denver Area

How to use a brand today



- Objective: To get on the list, and differentiate when you get there.
- Tactics:
 - Regional/
National positioning
 - Industry targeting
 - Creative development for identity, web, print, events, and other



Proactive search engine marketing programs



- Objective: To drive all search volume to your website that is evaluating your region
- Tactics:
 - SEO
 - Pay Per Click Campaigns
 - Regional targeting
 - Industry targeting

A screenshot of a Google search for "Omaha relocation". The search bar shows the text "Omaha relocation" and a "Search" button. Below the search bar, there are several search results. The first result is "Oakwood Executive Housing" from www.Oakwood.com, with a description "Search Locations Worldwide. Short & Long Term. All the Comforts of Home". The second result is "Real Estate Resources" from www.REMAX.com, with a description "Get Omaha Real Estate News Information and More at RE/MAX.com". There is a section for "Local results for relocation near Omaha, NE" with three entries: "Prudential Ambassador Real Estate - 8.1 miles W - 1", "Aspen Corporate Lodge - 6.2 miles W - 8941 Miami St", and "Cbshome Real Estate Co: Relocation - 11 miles W". To the right of these local results is a "Sponsored Links" section with three entries: "Omaha Relocation" from www.Move.com, "Nebraska Moving Company" from www.jimsmovingco.com, and "Budget Truck Rentals" from www.budgettruck.com. The "Omaha Relocation" entry has a description "Looking To Relocate To Nebraska? Get Prices, Tips & Info. Free Quote". The "Nebraska Moving Company" entry has a description "Local and Statewide Movers in Papillion, NE. Free Estimates!". The "Budget Truck Rentals" entry has a description "\$100 gas rebate on most 1-way truck rentals. Up to 15% off local moves."

Once prospects are on your website, you are in the final three.



- Objectives: Prompt them to call you, deliver differentiation, introduce to your sub region.
- Tactics:
 - Contact information
 - Brand messaging
 - GIS Data

indyPARTNERSHIP | 317-236-6262 Toll Free 1-877-236-4332 Find it Fast... Search

SITE SELECTION DATA | EXPAND & RELOCATE | BUSINESS CLUSTERS | LIVING HERE | NEWS & MEDIA | ABOUT US | PARTNERS | CONTACT US

CLEAN TECH ENERGY

ESN
 Governor Mitch Daniels
 President & CEO Paul Mitchell

New Initiative Positions Indiana as Clean-Tech Energy Leader

Indy Partnership's parent organization launches Energy Systems Network, an initiative bringing together the state's biggest players in manufacturing, energy, and the public sector, to drive Indiana clean energy.

[LEARN MORE](#)

LIFE SCIENCES
ADVANCED MANUFACTURING & LOGISTICS
TECHNOLOGY
THE 10-COUNTY INDIANAPOLIS REGION

Maps & Data >>

AREA MAPS

The 10-County Indianapolis Region >>

Recognition from national media and renowned business groups place the Indianapolis Region in the top tier of geographical regions and major metropolitan areas in the U.S. It's an exciting time to tell the world about our 10 counties and the strengths of our communities that have made us the envy of many.

Current Rankings:

- Indiana leads the nation in attracting new jobs through foreign investment for the second consecutive year, according to the latest annual Global Location Trends Report
 - IBM Global Business Services, 2008
- Town of Fishers ranked Best Small City on CNN Money's "Best Places to Live" in 2008
- The town of Franklin ranked 4th in the Nation for affordable housing.
 CNN.com, CNN Money, 2008

News Center

- (4/10/09) IEDI to Focus on Energy and Environmental Firms
- (4/04/09) Job mix blunts slump - City weathering recession better than rest of state, U.S.
- (4/03/09) Indy Hotel Ranks Top in The U.S.
- (4/03/09) Bloomington Lands National Basketball Event
- (4/02/09) Energy Execs: Indiana Positioned For Clean Technology Success

Press Releases

- (4/1/09) Indy Partnership Touting the Region's Life Sciences Strengths at Biotechnology Event in London
- (4/1/09) Indy Partnership in London Drawing Attention to Central Indiana's Motorsports Heritage and Strengths

Brand differentiation and Contact information



- Authentic story
- “Initiate a Project”

GREATER OMAHA
ECONOMIC DEVELOPMENT PARTNERSHIP

INITIATE A PROJECT | NEWS CENTER | ABOUT US | CONTACT US

HOME | PARTNERSHIP SERVICES | SITE SELECTION DATA | TOP BUSINESS SECTORS | GREATER OMAHA DEVELOPMENT | LIVING IN GREATER OMAHA

Search Site
Find it Fast...

Warren Buffett

From the land of **O!**
CAME A MAN WORTH MANY \$00s.

YOU DON'T HAVE TO BE Warren Buffett to hit your personal and professional stride in Omaha. We're already home to five Fortune 500 companies, two world-class medical schools and a highly educated workforce brimming with potential.

FEATURES

Development in Greater Omaha's Thriving Downtown
While downtown Omaha has long been a popular gathering place for residents and tourists alike, the ever-increasing pace of economic development promises an even brighter future — fostering unique partnerships between business, education and government.

Riverfront Place and pedestrian bridge rendering

NEWS & EVENTS

Press Releases
Downtown Baseball Stadium
Learn more...

> Select Tour
Upcoming Events
Learn more...

Featured Videos
This is Omaha!
View now...

MAPS
NATIONAL • REGIONAL • LOCAL MAPS

Your GIS should be fully integrated into your website, that enables sub regional analysis



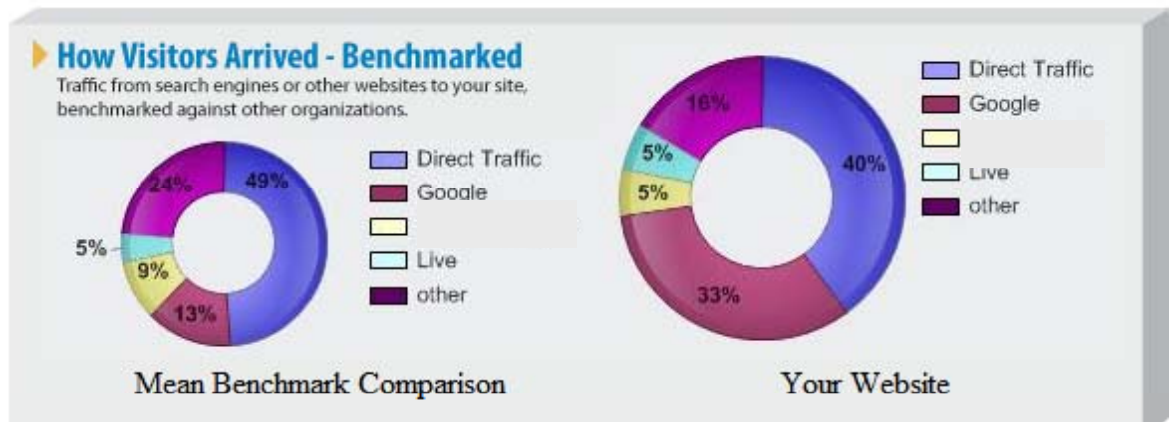
- Business Search:
 - Largest employers
 - Industry clusters
- Property Search:
 - Featured real estate
 - All available
- Community data search:
 - Thematic maps
 - Map overlays
- GIS analytical tools, including radius and drive time

The screenshot displays the Ohio InSite website interface. At the top, there is a navigation bar with links for 'WHY OHIO', 'KEY INDUSTRIES', 'REGIONS', 'MARKET ACCESS', 'LOW COST', 'WORKFORCE & EDUCATION', 'WORK-LIFE BALANCE', and 'NEWS'. Below this, a search bar is visible with options for 'STAY INFORMED', 'QUICK SEARCH', and 'CONTACT US'. The main content area features a 'WELCOME' section with the text 'Build your business. Love your life.' and a 'Ohio InSite' map showing various locations across the state. A sidebar on the left contains sections for 'NEW: OBDC BLOG' and 'OHIO TAX REFORM'. The bottom section of the screenshot shows a detailed map view with a search for 'American Electric Power Co' and a resulting company profile card. The profile card includes the company name, address ('1 Riverside Plz Fl 1, columbus, OH 43215'), and revenue information ('Revenue (\$): 13,380,000,000').

How do you know how well you are doing? Analytics.



- Development Results
- Benchmarked against ED's in 37 states
- All delivered by email



Summary: Ten things you should be doing today



1. Building your LinkedIn network
2. Virtual familiarization tours
3. Developing a positioning statement
4. Search engine marketing
5. World class website
6. Updating that website every other day, at least
7. Online GIS integrated into your website
8. Benchmarking your success
9. Marketing to workforce, on your website and through other means
10. Taking the mantel of “This is our time.”



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