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**COLORADO RIVER REGION  
TARGETED ECONOMIC  
DEVELOPMENT ANALYSIS: A  
COMMUNITY BUSINESS  
MATCHING MODEL APPROACH**

**INCLUDING THE COMMUNITIES OF:**

**LAUGHLIN, NV  
BULLHEAD CITY, AZ  
FORT MOHAVE, AZ  
MOHAVE VALLEY, AZ  
GOLDEN VALLEY, AZ**

**JANUARY 2008**



# **Colorado River Region Targeted Economic Development Analysis: A Community Business Matching Model Approach**

**Including the Communities of:**

**Laughlin, NV  
Bullhead City, AZ  
Fort Mohave, AZ  
Mohave Valley, AZ  
Golden Valley, AZ**

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## Acknowledgments

This report is intended to assist the communities in the Colorado River region identify potential economic sectors that can best fit local economic development goals and assets. This integrated research and educational program will help leaders and economic-development agencies to develop targeted regional strategic economic-development plans. The research team would like to thank the regional advisory committee for their ongoing leadership throughout the study. A special ‘thank you’ is given to the Economic Development Administration for the financial support through their economic adjustment grant program. Finally, the program team would also like to thank all the volunteers and residents that participated in the community goals survey.

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# **Colorado River Region Targeted Economic Development Analysis: A Community Business Matching Model Approach**

## **EXECUTIVE SUMMARY**

The University of Nevada, Reno Center for Economic Development and University of Nevada Cooperative Extension conducted the following study to assist communities in the Colorado River Region to identify industries to be targeted for short and long-range economic development planning. The Colorado River Region includes Laughlin, Nevada and Arizona communities of Bullhead City, Fort Mohave, Mohave Valley and Golden Valley. This study is in response to the recent closure of the Mohave Generating Station that employed nearly 300 direct jobs and supported over \$20 million in household income. Targeted strategic economic-development planning is a priority in the region to mitigate these losses. This study received financial support from the Economic Development Administration (EDA) under their economic adjustment grant program. The overall publication is divided into four sections: (1) Socioeconomic Analysis, (2) Community Business Matching (CBM) Methodology, (3) Colorado River Region CBM Procedure, and (4) Colorado River Region CBM Results.

The early stage of economic development planning and targeted industry analysis is to understand the social and economic characteristics of an area. This data is important for the regional economy to understand key characteristics that potentially influence or contribute to economic development activities. It can also be used as a recruitment or attraction tool for perspective industry's that target communities with specific socioeconomic characteristics. Key socioeconomic characteristics and indicators for the Colorado River Region include:

- Between 2000 and 2007, regional population increased from 70,086 to 85,253 (+32.04%).
- Between 2000 and 2007, regional households increased 20.85% to 34,784.
- Over one-third of the region's population has a high school education. A similar percentage of the population also reports they have received some college education.
- In 2007 regional unemployment rates was estimated at 6.9%.
- Between 2000 and 2004, total regional employment increased 9.39%.
- Between 2000 and 2004, total regional household adjusted income increased 26.08%.
- Between 2000 and 2004, adjusted per capita income increased 20.2%.
- Between 2000 and 2007, housing units increased 30.89%.

The Community Business Matching (CBM) model provides a framework for addressing the complexities that arise when community preferences are elicited and economic development opportunities must be weighted alongside environmental and social goals. The objective of the CBM model is to assist communities in targeted economic development. First, the community must quantify their goals and assets and then determine if any businesses are likely to both meet the communities' goals for economic development and find the community an attractive place to locate. The best "match" occur when the goals of the community correspond to the benefits provided by a business and when the assets of the community correspond with the demands of the business. The CBM process also provides an opportunity for the community to refine its economic development strategies based on the knowledge gained from possible industry matches identified by the model

The first step in the CBM process for the Colorado River region was to form a regional advisory committee whose primary purpose was to assist in leading the CBM community process. A 30-member advisory committee was assembled that represented diversity in the region by individual communities and affiliated groups (i.e., businesses/industry, local government, etc.).



Regional and community economic development goals and priorities were determined through four survey sessions, held in each community over a period of four days. A requirement of survey groups was to represent diversity in the Colorado River region. Diversity in the region was achieved by having representation in each session from the following groups: business/industry, health care, local government, education, utilities, non-profits, developers and entrepreneurs, retirees, youth groups, transportation and financial institutions. A minimum of 20 participants was required for each survey session.

A total of 81 residents completed the seven-page goals and priorities for economic development questionnaire. This questionnaire required participants to choose between two goals/priorities as to which is more important to them and then by how much through a rating scale between 1 and 9 (1=equally important to 9=extremely more important). This format made participants make trade-offs as it pertained to regional economic development goals and priorities.

The second part of the CBM process involved collecting regional asset data following a specific questionnaire. Select advisory committee members were requested to lead this process with the assistance of University personnel. Although some of this data was immediately available, it did require requesting assistance from local governmental and economic development agencies to complete the survey.

All data collected at the community level; goals and priorities and assets, was then entered into the CBM computer model and analyzed on a regional and individual community basis. Regional and community primary data was then matched with primary data collected from the 50 fastest growing North American Industrial Classification

System (NAICS) sectors. Over 2,500 actual businesses representing the 50 NAICS sectors have been telephone surveyed over the last two years asking specific questions related to business operations and factors important when considering expansion or relocation decisions.

Matching community and business responses generated a desirability and compatibility index that is presented in a scatter plot with one axis representing desirability index and the other axis representing compatibility index. Index results are measured between 0.00 and 1.00 and interpreted two ways. First, the desirability index measures the goals and priorities of the community against the attributes that individual NAICS sectors look for in a community when making expansion or relocation decisions. A perfect 1.0 index indicates that the community's goals perfectly match the NAICS sector goals and priorities when considering a community. Second, the compatibility index measures how well a community's existing assets match with the NAICS sector asset needs.

Following the CBM procedure, eight NAICS sectors were identified as having the best match for targeted economic development in the Colorado River region. Best match was defined as those NAICS sectors that reported at least a 0.85 index rating for both desirability (community goals and wants) and compatibility (business/industry needs).

Best match NAICS sectors include:

- 5416 Management, Scientific and Technical Consulting Services
- 5414 Specialized Design Services
- 4812 Nonscheduled Air Transportation
- 5417 Scientific Research and Development Services
- 3346 Manufacturing and Reproducing Magnetic and Optical Media
- 5415 Computer Systems Design and Related Services
- 4238 Machinery, Equipment and Supplies Merchant Wholesalers
- 6214 Outpatient Care Service

NAICS 5416 (management, scientific and technical consulting service) reports the best overall match with a 1.0 desirability index and .959525 compatibility index rating. This means that businesses that operate in this sector perfectly meet the regional economic development goals and priorities and there are strong indications that the region has the necessary assets to meet the needs of businesses operating in this sector. The most compatible industries are 5414 (specialized design services) and 5415 (computer system designs and related services) with a perfect match of 1.0. This means that the Colorado River region assets meet both NAICS sector needs. Although the regional economic development priority is to create economic development strategies targeted at NAICS sectors with the highest desirability and compatibility index ratings, it is important that the region consider each of the best match NAICS sectors when developing overall regional economic development strategies. That is, a series of short and long-range economic development strategies should be developed for each of the eight best matched NAICS sectors.

NAICS sectors that need additional analysis and consideration are those that are reporting high desirability indexes (greater than 0.85) and low compatibility indexes (less than 0.85). This means that these NACIS sectors meet the economic development goals and priorities for the region, but current regional assets do not adequately meet the required needs of businesses operating in a specific NAICS sector. Regional or community asset development strategies should be considered to improve the overall NACIS sector match. Sectors that fall in this category for the region include: NAICS

4841 (general freight trucking), 3362 (motor vehicle body and trailer manufacturing) and 4243 (apparel, piece goods and notions merchant wholesalers).

Best match sectors were also estimated for individual communities, Laughlin and Bullhead City and surrounding Arizona communities. Overall, several of the NAICS sectors reported as the best match for the Colorado River Region are also reported as the best match for the individual communities. Additional community NAICS sectors to be considered for targeted economic development strategies include: Laughlin, NAICS 6215 (medical and diagnostic laboratories), NAICS 5121 (motion picture and video industries), and NAICS 5413 (architectural, engineering and related services; Bullhead City and surrounding Arizona communities, NAICS 4841 (general freight trucking), NAICS 3362 (motor vehicle body trailer manufacturing) and NAICS 4243 (apparel, piece goods and notions merchant wholesalers). Although individual community economic development strategies may be preferred in some instances, it is recommended that a regional planning approach be perused using the assets in the region. Each community has its own strengths and assets to attract specific NAICS sectors, but a well coordinated regional plan will minimize duplication of competitive activities.

Several additional economic development strategic planning steps for the Colorado River region and individual communities need to be further considered using the results from this analysis. Some activities to consider when developing a regional economic development and implementation strategy include:

1. Assure that a strong economic development strategic planning committee exists that will use information in this report as a starting point for any regional economic development strategic plan.
2. Further study or collect additional data for each NAICS sector identified as having the best match in the Colorado River Region and individual communities.

3. Strategic planning committee(s) should consider developing regional and community marketing materials highlighting local assets. Understand what assets are important for each best match NAICS sector and highlight these assets in any marketing materials. Customize marketing materials, if needed.
4. Develop targeted business contact strategy for each NAICS best match sectors. This can be accomplished by purchasing a direct mailing contact list from third party vendors (i.e. Dunn & Bradstreet). These lists are usually very reasonably priced and can be custom sorted by different criteria (i.e., firm size, sales, location, etc.)
5. Assemble a strategic economic development sub-committee to further examine NAICS sector compatibility issues (i.e. infrastructure, etc.) and develop action strategies to improve regional and community assets.

## INTRODUCTION

Regional economic development programs have traditionally concentrated on attracting export-oriented, goods-producing industries such as manufacturing. Local economic development professionals pursue such programs because export industries generate local expenditures for existing economic sectors, a result of the additive development effect. Moreover, success in attracting a manufacturing firm is highly visible with abundant opportunities for media coverage (Elisinger, 1995), in addition to the direct measurable effects of increases in employment and income.

Recruitment programs aimed at export-oriented, goods-producing industries, however, are relatively expensive with a high degree of risk, which can result in low net returns for smaller communities with limited resources. Hansen (1970) found that many communities may have limited success at industrial recruitment because they may lack the assets desired by businesses. In order to assist in recruitment, tax concessions may be granted to new or relocating firms which limit the opportunities for local fiscal gains. This approach increases the local tax burden because the cost of increased community services for the new industry may not be necessarily off set by an expansion in the tax base (Tweeten and Brinkman, 1976). Moreover, firms that are attracted to a community if offered sufficient incentives are also likely to leave if better offers are found elsewhere (Winder, 1969). McNamara and Green (1988) concluded, based on survey results, that planning commissions continue to emphasize the recruitment of export-oriented industries. However, as planners become more educated about the possibilities for import substitution, the pursuit of alternative economic development strategies, such as local services and retail sector development is more common.

Economic development planners and practitioners have often felt the need to act quickly and so, have recruited industries with little or no input from community residents (Blakely, 1994). Without the support of local residents, the sustainability of these efforts may be questionable. Incorporating community preferences adds complexity to development strategies and to the decision-making processes needed to formulate them. When citizen input is solicited, environmental and social goals must be addressed alongside objectives for economic development. Development strategies become more complex since tradeoffs between economic, environmental and social goals are inevitable. Strategies that ignore these interactions run the risk of unintended, long-term consequences, such as sprawl at the expense of environmental quality. Decision making that incorporates community preferences can be difficult since the issues under consideration can be hard to quantify. Further, if there is a diversity of views within a community, as is likely, there will not be unanimity regarding the weights that should be given to different goals.

The Community Business Matching (CBM) model provides a framework for addressing the complexities that arise when community preferences are elicited and economic development opportunities must be weighted alongside environmental and social goals. The objective of CBM is to assist communities in identifying their goals for targeted economic development, the assets that will help them achieve those goals and the type of businesses that will be most compatible with these goals and assets. CBM offers (1) a transparent and replicable process for measuring community goals and assets relative to economic development, and (2) a systematic procedure for matching these goals with the characteristics and requirements of businesses. Importantly, CBM can

reveal differences in preferences within a community and therefore provide a foundation for discussion and reevaluation of priorities.

The purpose of this study is to provide technical assistance to the communities in the Colorado River region by identifying industries to target for short and long-range economic development planning. With the recent closure of the Mohave Generating Station, one of the largest employers in the region, targeted industry economic development planning is essential to help mitigate the loss of nearly 300 jobs and over \$20 million of household income. Using the CBM procedure, specific industries by North American Industrial Classification System (NAICS) are identified that best match the community desires and business/industry needs. This study received financial support from Economic Development Administration (EDA) under their economic adjustment grant program.

The following report is divided into five sections including: (1) Colorado River Region Socioeconomic Description; (2) Community Business Matching Conceptual Model; (3) Colorado River Region CBM Process; (4) CBM Results (Regional, Laughlin Community and Bullhead City and Surrounding Arizona Communities); and (5) Summary and Discussion. The appendix includes a comprehensive description of the top 14 sectors identified as having the best match for developing a regional targeted economic development strategy.



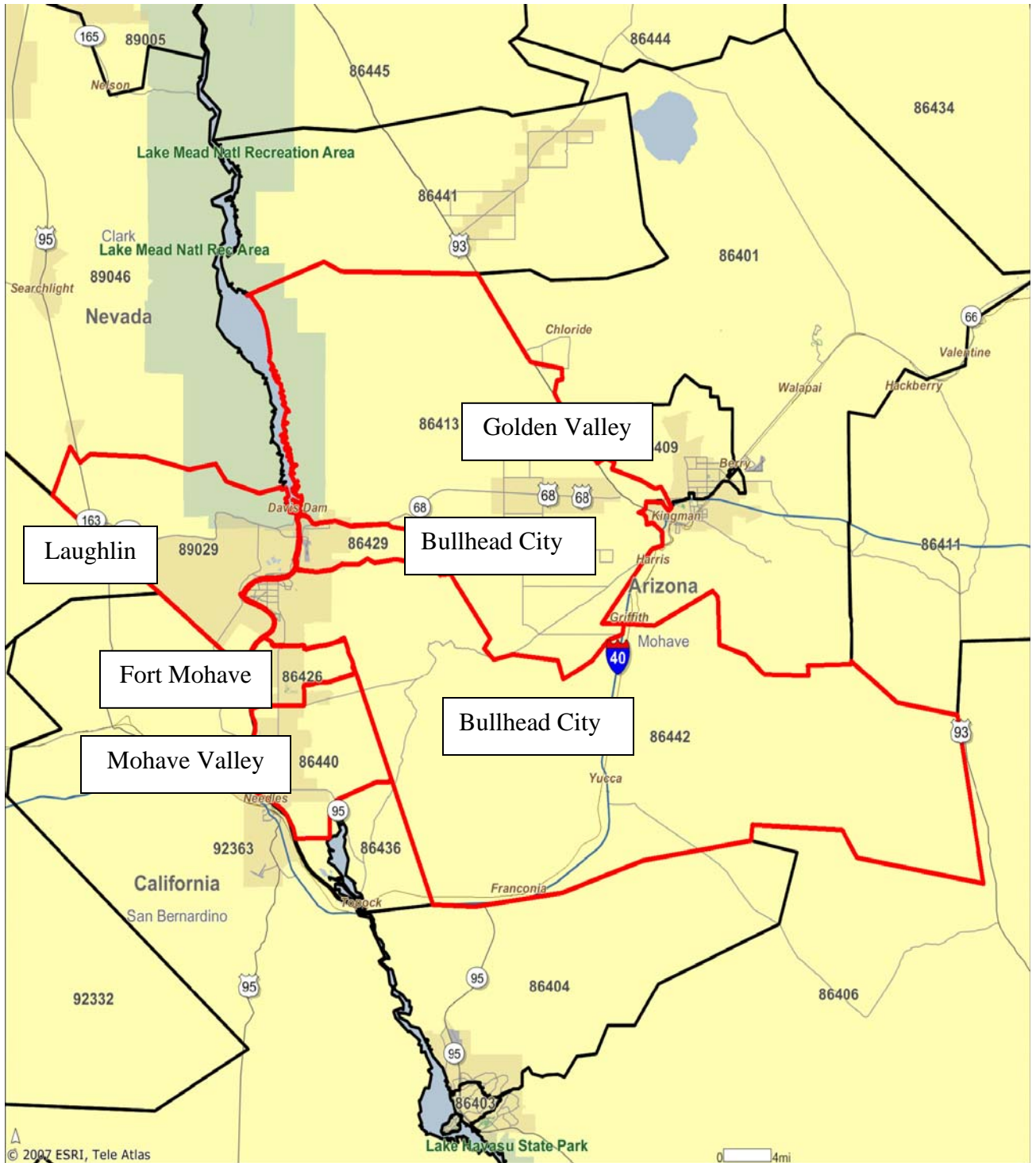
## **COLORADO RIVER REGION SOCIOECONOMIC DESCRIPTION**

The early stage of economic development planning and targeted industry analysis is to understand the social and economic characteristics of an area. The following section provides a snapshot of the regions social and economic characteristics. This data is important for the regional economy to understand key characteristics that potentially influence or contribute to economic development activities. It can also be used as a recruitment or attraction tool for perspective industry's that target communities with specific socioeconomic characteristics. Several of these characteristics are also included in the CBM procedure in determining the most compatible industries for the regional economy.

The Colorado River region is defined as: Laughlin, Nevada and Arizona communities of Bullhead City, Fort Mohave, Mohave Valley and Golden Valley. Secondary data published by various federal and private sources is used in this analysis. First, Bureau of Census is used for 2000 estimates for all social and housing characteristics. Second, ERSI, a private business providing socioeconomic and trade area data, is used for 2004 and 2007 estimates. Third, County Business Patterns and Bureau of Economic Analysis are used for employment and income estimates.

Basic frequency trend analysis was performed on all variables. Each individual community, region, respective county and state and United States is analyzed for each variable. This comparison provides a good benchmark to see how an individual community is performing compared to other communities and areas, the region or United States. Tables, graphs and summary findings are presented for each variable. Results are presented in the following pages.

Regional Map by Zip Code (outline in red).



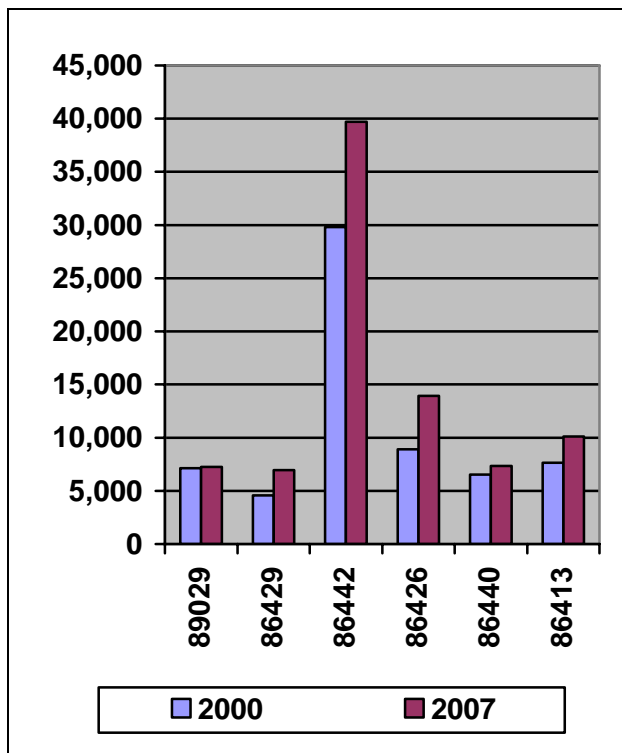
## POPULATION

Table 1. Population Trend, 2000 and 2007.

Community (Zip Code)	2000	2007	Percent Change	Number Change
Laughlin (89029)	7,133	7,261	+1.79%	+128
Bullhead City (86429)	4,560	6,944	+52.38%	+2,384
Bullhead City (86442)	29,806	39,698	+33.19%	+9,892
Fort Mohave (86426)	8,918	13,917	+56.06%	+4,999
Mohave Valley (86440)	6,513	7,326	+12.48%	+813
Golden Valley (86413)	7,637	10,107	+32.34%	+2,470
Total Region	70,086	85,253	+32.04%	+20,686
Clark County, NV	1,375,765	1,893,507	+37.63%	517,742
Mohave County, AZ	155,032	202,681	+30.73%	+47,649
Nevada	1,998,257	2,645,277	+32.38%	+647,020
Arizona	5,130,632	6,363,799	+24.04%	+1,233,167
U.S.	281,421,906	306,348,230	+8.86%	+24,926,324

Source: 2000 Census of Population and Housing. ERSI Forecast for 2007.

Figure 1. Population Trends, 2000 and 2007.



### Summary:

- Between 2000 and 2007, the total regional population increased over 20,686 people.
- Over 46 percent of the region's population is located in Bullhead City (86442).
- Every community in the region has experienced growth in population with Fort Mohave (86426) experiencing the largest percentage growth +56.06%, followed by Bullhead City (86429) at 52.38% and Bullhead City (86442) at 33.9%.
- Laughlin (89028) only experienced 1.79% growth which is the smallest in the region mainly because of land constraints.

## AGE (CHANGE GRAPHS)

Figure 2. Total Region Percent Age Distribution, 2000.

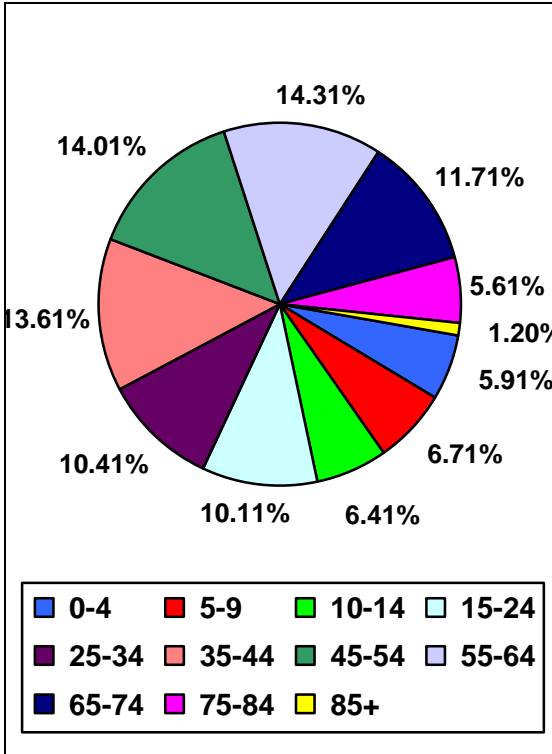
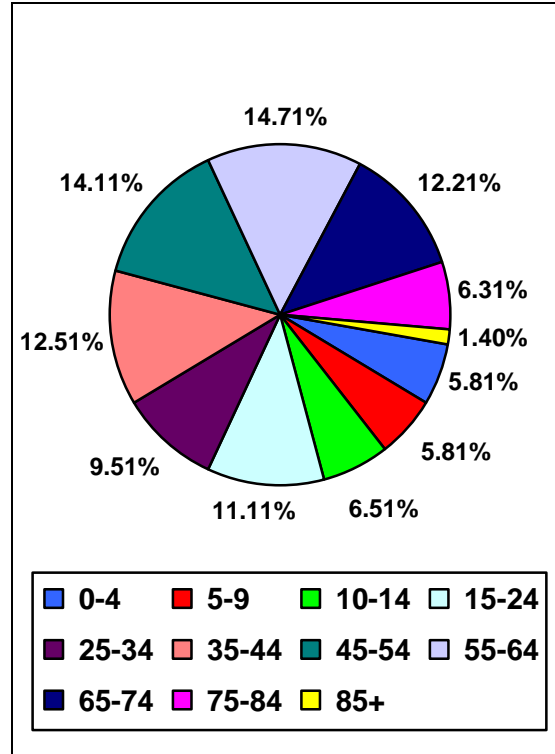


Figure 3. Total Region Percent Age Distribution, 2007.



### *Summary*

Overall, the age distribution in the region has changed very little between 2000 and 2007.

- Ages 0 – 24 represent approximately 29 percent of the regional population.
- Ages 25 - 44 represent approximately 22 percent of the regional population.
- Ages 45 – 64 represent approximately 29 percent of the regional population.
- Ages 65+ represent approximately 20 percent of the regional population.

Table 2. Percent Age Distribution by Community, Region, County, State and U.S., 2000.

	0 - 4	5 - 9	10 - 14	15 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65 - 74	75 - 84	85+	Total
<b>PERCENT</b>												
Laughlin (89029)	4.7%	5.2%	5.3%	9.1%	10.1%	13.3%	15.9%	17.8%	13.5%	4.6%	0.6%	100.0%
Bullhead City (86429)	5.3%	4.8%	4.5%	11.1%	10.6%	12.7%	14.3%	17.6%	13.1%	4.8%	1.1%	100.0%
Bullhead City (86442)	6.4%	7.0%	6.0%	10.4%	11.1%	13.1%	13.0%	13.3%	11.5%	6.6%	1.5%	100.0%
Fort Mohave (86426)	6.3%	7.7%	7.4%	9.5%	11.5%	14.8%	13.1%	13.9%	10.8%	4.4%	0.7%	100.0%
Mohave Valley (86440)	5.9%	6.6%	7.6%	10.3%	9.6%	15.3%	14.1%	12.5%	11.4%	5.5%	1.1%	100.0%
Golden Valley (86413)	4.4%	6.1%	6.8%	8.3%	8.0%	13.9%	16.5%	17.1%	12.8%	5.2%	1.0%	100.0%
Total Region	5.9%	6.7%	6.4%	10.1%	10.4%	13.6%	14.0%	14.3%	11.7%	5.6%	1.2%	100.0%
Clark County, NV	7.5%	7.6%	6.8%	12.9%	16.2%	16.0%	12.9%	9.4%	6.6%	3.4%	0.8%	100.0%
Mohave County, AZ	6.0%	6.6%	6.6%	10.3%	10.0%	13.3%	13.1%	13.6%	12.3%	6.7%	1.5%	100.0%
Nevada	7.3%	7.5%	7.0%	12.9%	15.3%	16.1%	13.5%	9.5%	6.6%	3.5%	0.9%	100.0%
Arizona	7.5%	7.6%	7.4%	14.2%	14.5%	15.0%	12.2%	8.6%	7.1%	4.6%	1.3%	100.0%
U.S.	6.8%	7.3%	7.3%	13.9%	14.2%	16.0%	13.4%	8.6%	6.5%	4.4%	1.5%	100.0%
<b>TOTAL POPULATION</b>												
Laughlin (89029)	333	369	381	646	719	949	1,137	1,267	961	327	42	7,133
Bullhead City (86429)	242	217	207	506	485	579	654	800	597	221	50	4,560
Bullhead City (86442)	1,898	2,096	1,790	3,111	3,319	3,900	3,879	3,978	3,438	1,966	432	29,806
Fort Mohave (86426)	563	683	657	849	1,027	1,316	1,170	1,238	960	396	59	8,918
Mohave Valley (86440)	384	432	495	671	625	996	921	816	746	366	74	6,513
Golden Valley (86413)	338	464	519	636	609	1,063	1,259	1,306	974	394	77	7,637
Total Region	3,758	4,261	4,049	6,419	6,784	8,803	9,020	9,405	7,670	3,664	734	64,567

Source: 2000 Census of Population and Housing.

Table 3. Percent Age Distribution by Community, Region, County, State and U.S., 2007.

	0 - 4	5 - 9	10 - 14	15 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65 - 74	75 - 84	85+	Total
<b>PERCENT</b>												
Laughlin (89029)	4.5%	3.6%	4.7%	15.0%	7.8%	9.4%	12.6%	18.6%	14.3%	8.2%	1.4%	100.0%
Bullhead City (86429)	5.2%	5.3%	4.4%	8.3%	12.3%	9.8%	13.5%	16.2%	16.0%	7.5%	1.4%	100.0%
Bullhead City (86442)	6.3%	5.8%	6.7%	10.0%	10.2%	11.9%	13.6%	15.1%	12.2%	6.5%	1.9%	100.0%
Fort Mohave (86426)	6.2%	5.4%	6.9%	11.7%	7.6%	13.4%	14.5%	15.7%	12.3%	5.3%	1.0%	100.0%
Mohave Valley (86440)	6.1%	5.7%	6.0%	12.0%	8.2%	12.3%	16.3%	14.6%	11.3%	6.0%	1.5%	100.0%
Golden Valley (86413)	4.3%	4.2%	6.4%	10.3%	5.9%	10.4%	17.7%	19.3%	14.2%	6.2%	1.0%	100.0%
Total Region	5.8%	5.8%	6.5%	11.1%	9.5%	12.5%	14.1%	14.7%	12.2%	6.3%	1.4%	100.0%
Clark County, NV	7.4%	6.7%	6.9%	12.5%	14.5%	15.5%	13.4%	11.1%	7.1%	3.8%	1.1%	100.0%
Mohave County, AZ	6.1%	5.6%	6.4%	11.3%	9.1%	11.8%	13.8%	14.1%	12.5%	7.5%	1.8%	100.0%
Nevada	7.3%	6.6%	6.9%	12.9%	13.8%	15.1%	13.9%	11.5%	7.1%	3.9%	1.1%	100.0%
Arizona	7.6%	7.1%	7.3%	14.4%	14.0%	14.1%	12.6%	9.5%	7.1%	4.8%	1.5%	100.0%
U.S.	6.9%	6.5%	6.8%	14.1%	13.2%	14.4%	14.6%	10.8%	6.3%	4.4%	1.9%	100.0%
<b>TOTAL POPULATION</b>												
Laughlin (89029)	328	260	338	1,088	566	683	918	1,350	1,035	595	100	7,261
Bullhead City (86429)	363	370	308	575	855	682	940	1,123	1,111	523	94	6,944
Bullhead City (86442)	2,492	2,294	2,641	3,939	4,042	4,717	5,408	5,981	4,839	2,589	756	39,698
Fort Mohave (86426)	859	752	963	1,631	1,053	1,865	2,012	2,191	1,717	732	142	13,917
Mohave Valley (86440)	450	414	439	880	599	903	1,194	1,070	830	438	109	7,326
Golden Valley (86413)	436	424	644	1,044	601	1,047	1,788	1,954	1,434	628	106	10,107
Total Region	4,928	4,514	5,333	9,157	7,716	9,897	12,260	13,669	10,966	5,505	1,307	85,253

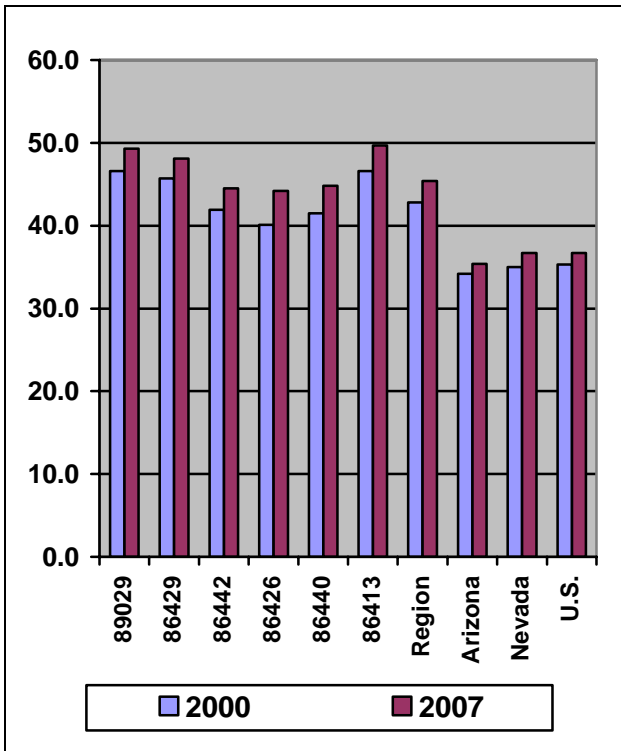
Source: 2000 Census of Population and Housing. ERSI Forecast for 2007.

Table 4. Median Age Trends by Community, County, State, and U.S., 2000 and 2007.

Community (Zip Code)	2000	2007	Percent Change
Laughlin (89029)	46.6	49.3	+5.79%
Bullhead City (86429)	45.7	48.1	+5.25%
Bullhead City (86442)	41.9	44.5	+6.21%
Fort Mohave (86426)	40.1	44.2	+10.22%
Mohave Valley (86440)	41.5	44.8	+7.95%
Golden Valley (86413)	46.6	49.7	+6.65%
Total Region	42.8	45.4	+6.07%
Clark County, NV	34.4	36.3	+5.52%
Mohave County, AZ	43.0	45.6	+6.05%
Nevada	35.0	36.7	+4.86%
Arizona	34.2	35.4	+3.51%
U.S.	35.3	36.7	+3.97%

Source: 2000 Census of Population and Housing. ERSI Forecast for 2007.

Figure 4. Median Age Trends by Community, County, State and U.S., 2000 and 2007.



**Summary:**

- Between 2000 and 2007, median age had increased in the region 6.07%. This trend is greater than the rate of increase at the respective county, state and U.S. level.
- Laughlin (89029) and Golden Valley (86413) consistently report the highest median age in the region.

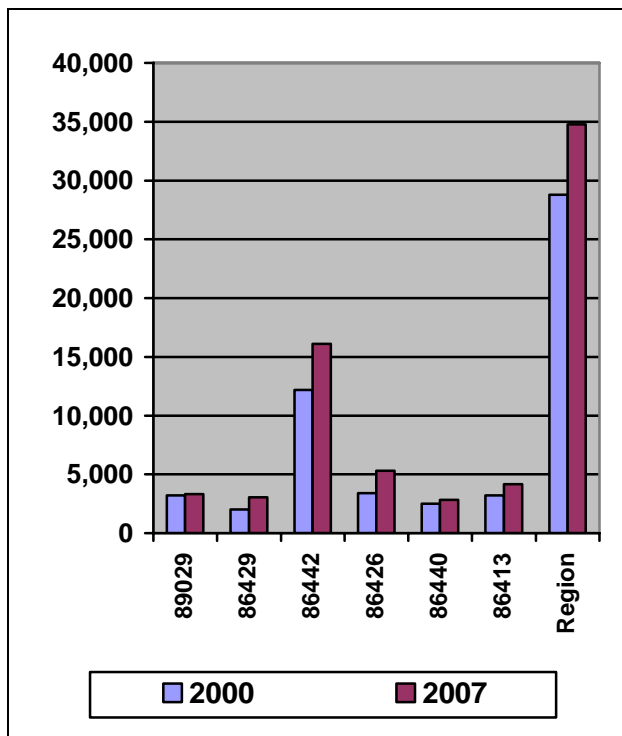
## HOUSEHOLDS

Table 5. Household Trends by Community, County, State and U.S., 2000 and 2007.

Community (Zip Code)	2000	2007	Percent Change	Number Change
Laughlin (89029)	3,208	3,319	+3.46%	+111
Bullhead City (86429)	2,013	3,047	+51.37%	+1,034
Bullhead City (86442)	12,182	16,112	+32.26%	+3,930
Fort Mohave (86426)	3,403	5,310	+56.04%	+1,907
Mohave Valley (86440)	2,516	2,829	+12.44%	+313
Golden Valley (86413)	3,221	4,167	+29.37%	+946
Total Region	28,783	34,784	+20.85%	+6,001
Clark County, NV	512,253	704,837	+37.60%	+192,584
Mohave County, AZ	62,809	81,817	+30.26%	+19,008
Nevada	751,665	994,525	+32.31%	+242,860
Arizona	1,901,327	2,354,799	+23.85%	+453,472
U.S.	105,480,101	115,337,039	+9.34%	+9,856,938

Source: 2000 Census of Population and Housing. ERSI Forecast for 2007.

Figure 5. Household Trends by Community & Region, 2000 and 2007.



### Summary:

- + Households are defined as total people living in a residence. This could include families, friends and acquaintances.
- + Consistent with the largest population base, Bullhead City (86442) has the largest number of households at 16,112.
- + Fort Mohave (86426) reports the largest percentage increase in households at 56.04%, followed by Bullhead City (86429) at 51.37% and Bullhead City (86442) at 32.26%.

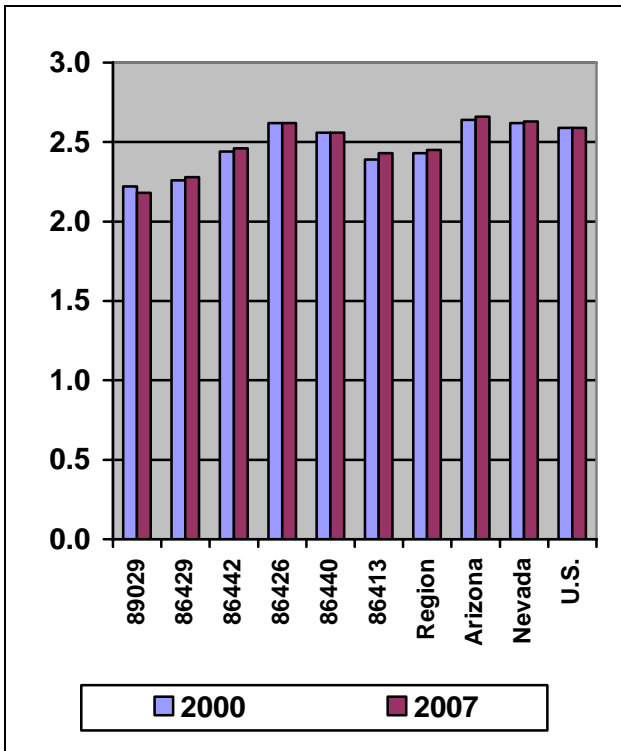


Table 6. Average Household Size Trends by Community, County, State and U.S., 2000 and 2007.

Community (Zip Code)	2000	2007	Percent Change
Laughlin (89029)	2.22	2.18	-1.80%
Bullhead City (86429)	2.26	2.28	+0.88%
Bullhead City (86442)	2.44	2.46	+0.82%
Fort Mohave (86426)	2.62	2.62	0.00%
Mohave Valley (86440)	2.56	2.56	0.00%
Golden Valley (86413)	2.39	2.43	-1.67%
Total Region	2.43	2.45	+0.82%
Clark County, NV	2.65	2.66	+0.38%
Mohave County, AZ	2.45	2.46	+0.41%
Nevada	2.62	2.63	+0.38%
Arizona	2.64	2.65	+0.38%
U.S.	2.59	2.59	+0.00%

Source: 2000 Census of Population and Housing. ERSI Forecast for 2007.

Figure 6. Average Household Size Trends by Community, County, State and U.S., 2000 and 2007.



**Summary:**

- Between 2000 and 2007, average household size in the Colorado River region slightly increased by +0.82%.
- Consistent across communities in the region, the average household size is smaller than respective counties, state and U.S. averages.

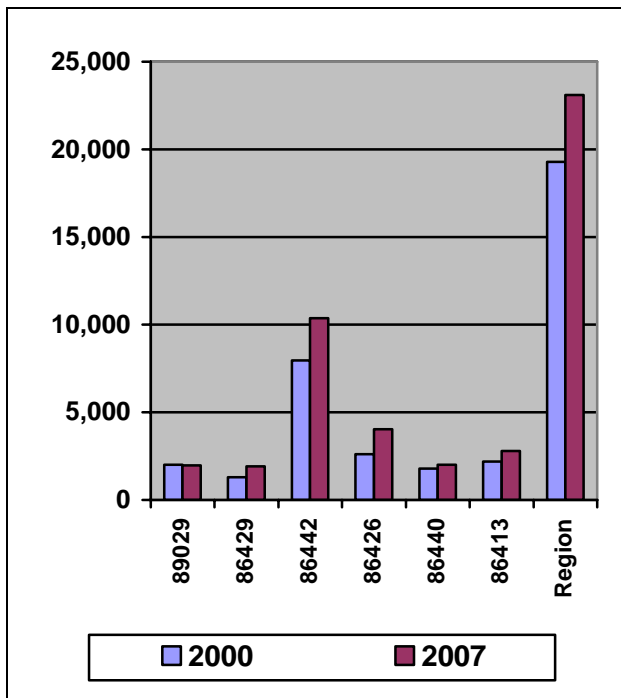
## FAMILIES

Table 7. Number of Families Trends by Community, County, State and U.S., 2000 and 2007.

Community (Zip Code)	2000	2007	Percent Change	Number Change
Laughlin (89029)	2,007	1,978	-1.44%	-29
Bullhead City (86429)	1,294	1,923	+48.61%	+629
Bullhead City (86442)	7,955	10,373	+30.40%	+2,418
Fort Mohave (86426)	2,618	4,033	+54.05%	+1,415
Mohave Valley (86440)	1,792	2,000	+11.61%	+208
Golden Valley (86413)	2,189	2,800	+27.91%	+611
<b>Total Region</b>	<b>19,297</b>	<b>23,107</b>	<b>+19.74%</b>	<b>+3,810</b>
Clark County, NV	339,693	461,939	+35.99%	+122,246
Mohave County, AZ	43,372	55,801	+28.66%	+12,429
Nevada	498,333	651,983	+30.83%	+153,650
Arizona	1,287,367	1,575,121	+22.35%	+287,754
U.S.	71,787,347	77,236,852	+7.59%	+5,449,505

Source: 2000 Census of Population and Housing. ERSI Forecast for 2007.

Figure 7. Number of Families Trends by Community & Region, 2000 and 2007.



### Summary:

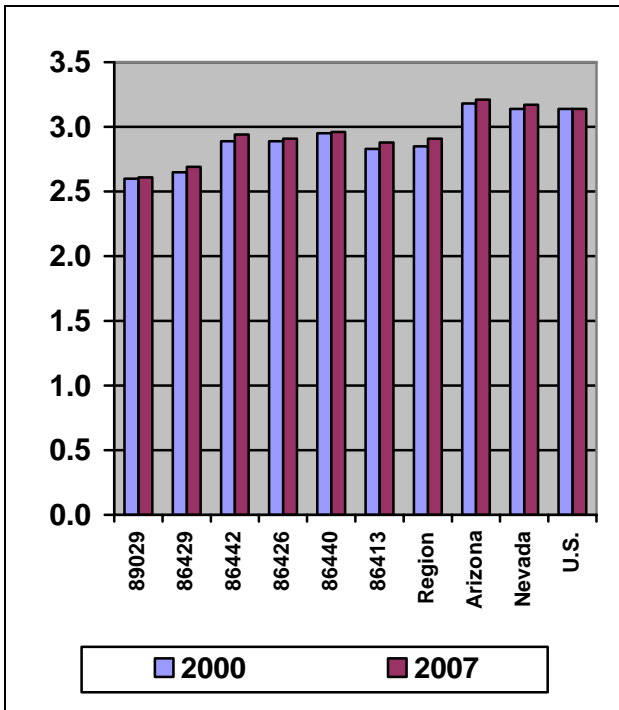
- + Families are defined as persons related by birth, marriage or adoption.
- + Fort Mohave (86426) reports the greatest percentage increase of family households in the region at (+54.05%).
- + Largest concentration of families is located in Bullhead City (86442).
- + Smallest concentration of families is located in Bullhead City (86429) and Laughlin (89029).

Table 8. Average Family Size Trends by Community, County, State and U.S., 2000 and 2007.

Community (Zip Code)	2000	2007	Percent Change
Laughlin (89029)	2.60	2.61	+0.38%
Bullhead City (86429)	2.65	2.69	+1.51%
Bullhead City (86442)	2.89	2.94	+1.73%
Fort Mohave (86426)	2.89	2.91	+0.69%
Mohave Valley (86440)	2.95	2.96	+0.34%
Golden Valley (86413)	2.83	2.88	+1.77%
Total Region	2.85	2.91	+2.11%
Clark County, NV	3.17	3.20	+0.95%
Mohave County, AZ	2.87	2.90	+1.05%
Nevada	3.14	3.17	+0.96%
Arizona	3.18	3.21	+0.94%
U.S.	3.14	3.14	0.00%

Source: 2000 Census of Population and Housing. ERSI Forecast for 2007.

Figure 8. Average Family Size Trends by Community, County, State and U.S., 2000 and 2007.



**Summary:**

- Overall, the region's average family size has increased 2.11%.
- Golden Valley (86413) reports the largest percentage increase in average family size (+1.77%).
- Consistently, the majority of communities in the region are smaller than their respective county, state and U.S. averages.

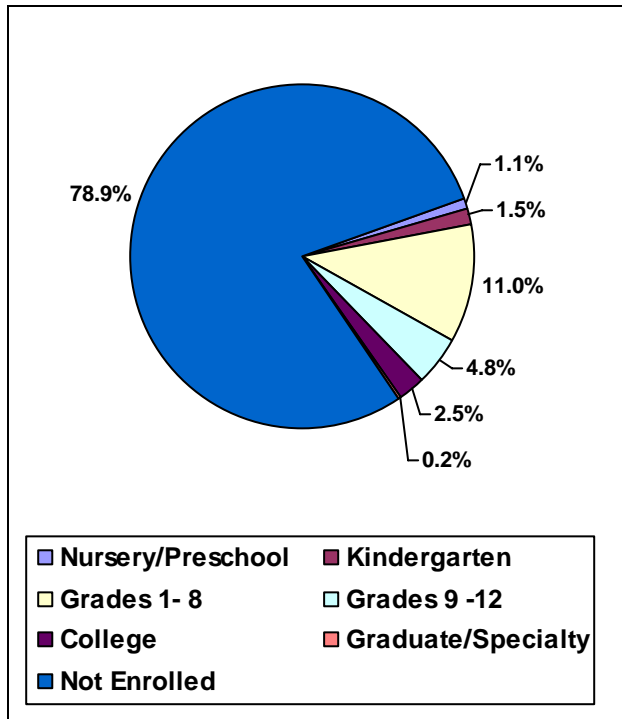
## EDUCATION

Table 9. Percentage of Population 3+ by School Enrollment, 2000.

Community (Zip Code)	Nursery/ Preschool	Kinder- garten	Grades 1 - 8	Grades 9 - 12	College	Graduate Specialty	Not Enrolled
Laughlin (89029)	0.7%	1.1%	9.6%	2.6%	1.8%	0.1%	84.1%
Bullhead City (86429)	0.9%	1.2%	7.5%	3.8%	2.7%	0.4%	83.6%
Bullhead City (86442)	1.3%	1.7%	10.7%	4.4%	2.6%	0.2%	79.0%
Fort Mohave (86426)	1.0%	1.7%	12.8%	5.9%	3.1%	0.0%	75.5%
Mohave Valley (86440)	0.8%	0.7%	13.6%	5.4%	3.0%	0.3%	76.1%
Golden Valley (86413)	1.1%	0.8%	10.4%	5.3%	1.2%	0.3%	81.1%
Total Region	1.1%	1.5%	11.0%	4.8%	2.5%	0.2%	78.9%
Clark County, NV	1.4%	1.6%	12.0%	5.2%	4.1%	0.8%	74.9%
Mohave County, AZ	1.3%	1.3%	11.1%	4.8%	3.1%	0.4%	78.0%
Nevada	1.4%	1.6%	12.1%	5.5%	4.3%	0.9%	74.2%
Arizona	1.7%	1.6%	12.7%	5.8%	5.6%	1.2%	71.4%
U.S.	1.8%	1.5%	12.5%	6.1%	5.3%	1.2%	71.6%

Source: 2000 Census of Population and Housing.

Figure 9. Percentage of Regional Population 3+ by School Enrollment, 2000.



### Summary:

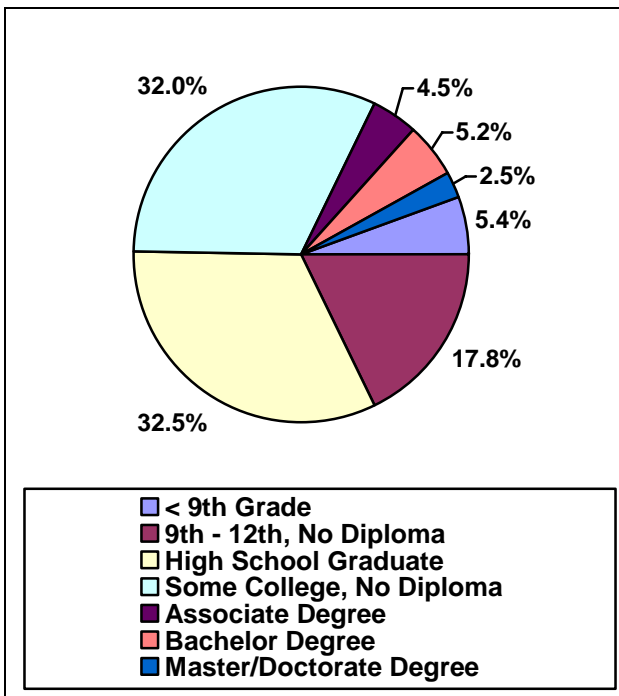
- ✚ Consistent across communities in the region, 25% or less of their population ages 3+ is not enrolled in any type of education. At the county, state and U.S. level a larger percentage of the population ages 3+ are enrolled in education.
- ✚ Laughlin (89029), Bullhead City (86428) and Golden Valley (86413) report less than 20% of their total population ages 3+ enrolled in education.
- ✚ Fort Mohave (86426) has the largest percentage of population ages 3+ enrolled in education which is consistent with the largest concentration of household families in the region.

Table 10. Percentage of Population 25+ by Highest Level of Educational Attainment, 2000.

Community (Zip Code)	< 9 <sup>th</sup> Grade	9 <sup>th</sup> – 12 <sup>th</sup> No Diploma	High School Graduate	Some College No Diploma	Associate Degree	Bachelor Degree	Master/Doctorate Degree
Laughlin (89029)	4.2	14.5	35.9	30.8	3.9	8.6	2.0
Bullhead City (86429)	1.6	20.9	33.8	24.7	6.8	8.5	3.7
Bullhead City (86442)	7.7	21.1	34.9	23.7	4.7	4.9	3.0
Fort Mohave (86426)	4.4	15.5	39.5	26.2	4.9	6.3	3.2
Mohave Valley (86440)	4.7	19.5	40.8	23.7	4.4	5.6	1.3
Golden Valley (86413)	5.7	21.8	35.1	25.0	6.0	4.4	2.1
Total Region	6.0	19.6	35.8	35.2	5.0	5.7	2.8
Clark County, NV	6.9	13.6	29.9	26.4	5.9	11.5	5.9
Mohave County, AZ	5.0	17.5	34.9	27.1	5.6	6.4	3.6
Nevada	6.4	12.9	29.3	27.0	6.2	12.1	6.1
Arizona	7.8	11.2	24.3	26.4	6.7	15.2	8.4
U.S.	7.5	12.1	28.6	21.0	6.3	15.5	8.9

Source: 2000 Census of Population and Housing.

Figure 10. Population 25+ by Highest Level of Educational Attainment, 2000.



**Summary:**

- In 2000, the overall region reports 25.6% of the population ages 25+ has less than a high school education. This is a relatively high percentage when compared to respective county, state and U.S. averages.
- Over one-third of the region's population has a high school education. A similar percentage of the population reports they have received some college education.

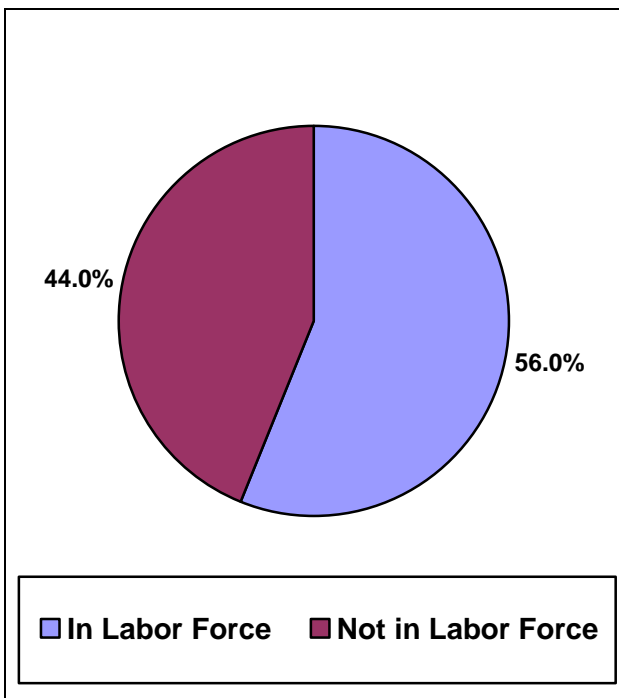
## EMPLOYMENT

Table 11. Percentage of Age 16+ Labor Force Trends, 2000.

Community (Zip Code)	In Labor Force	Not in Labor Force
Laughlin (89029)	62.6	37.4
Bullhead City (86429)	62.4	37.6
Bullhead City (86442)	54.9	45.1
Fort Mohave (86426)	57.7	42.3
Mohave Valley (86440)	57.0	43.0
Golden Valley (86413)	51.3	48.7
Total Region	56.0	44.0
Clark County, NV	65.1	34.9
Mohave County, AZ	52.8	47.2
Nevada	65.2	34.8
Arizona	61.1	38.9
U.S.	63.9	36.1

Source: 2000 Census of Population and Housing.

Figure 11. Percentage of Age 16+ Labor Force Trends, 2000.



**Summary:**

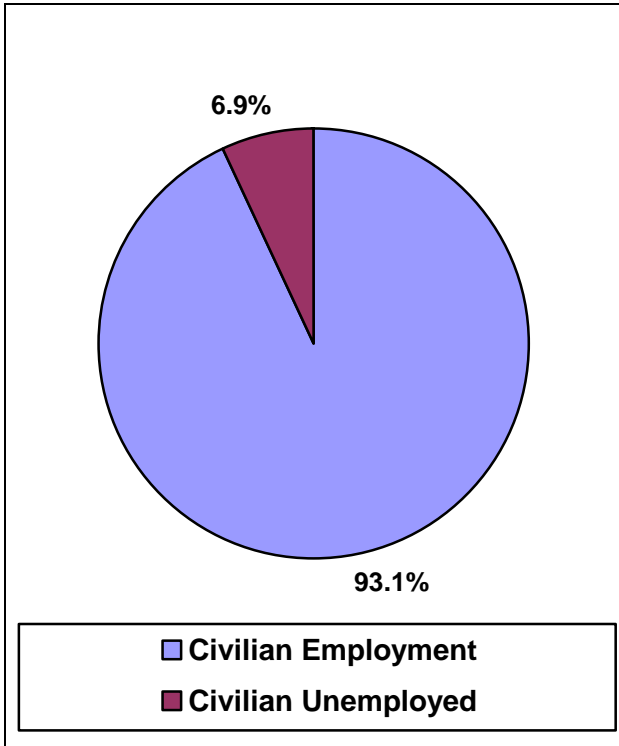
✚ In 2000, over 55% of the population 16+ was considered part of the labor force. This trend is relatively low when compared to respective county, state and U.S. averages. This suggests that the region may have a large concentration of retirees.

Table 12. Percentage of Age 16+ in Labor Force, 2007.

Community (Zip Code)	Civilian Employment	Civilian Unemployed
Laughlin (89029)	96.5%	3.5%
Bullhead City (86429)	94.0%	6.0%
Bullhead City (86442)	92.7%	7.3%
Fort Mohave (86426)	94.3%	5.7%
Mohave Valley (86440)	91.8%	8.2%
Golden Valley (86413)	87.7%	12.3%
Total Region	93.1%	6.9%
Clark County, NV	92.9%	7.1%
Mohave County, AZ	92.5%	7.5%
Nevada	93.3%	6.7%
Arizona	93.4%	6.6%
U.S.	93.4%	6.6%

Source: 2000 Census of Population and Housing. ERSI Forecast for 2007.

Figure 12. Percentage of Age 16+ in Regional Labor Force, 2007.



**Summary:**

- ✚ In 2007, regional employment and unemployment percentages were similar to U.S. averages.
- ✚ Note: employment and unemployment estimates may not accurately reflect current community and regional employment conditions given the recent regional economic activity.

Table 13. Total Employment Trends by Community, County, State and U.S., 2000 and 2004.

Community (Zip Code)	2000	2004	Percent Change	Number Change
Laughlin (89029)	14,807	15,642	+5.6%	+835
Bullhead City (86429)	759	1,150	+51.5%	+391
Bullhead City (86442)	7,973	8,490	+6.5%	+517
Fort Mohave (86426)	1,927	2,332	+21.0%	+405
Mohave Valley (86440)	905	840	-7.2%	-65
Golden Valley (86413)	409	840	+105.4%	+431
Total Region	26,780	29,284	+9.4%	+2,504
Clark County, NV	863,502	934,581	+8.2%	+71,079
Mohave County, AZ	54,637	61,966	+13.4%	+7,329
Nevada	1,267,999	1,347,456	+6.3%	+79,457
Arizona	2,819,302	2,926,467	+3.8%	+107,165
U.S.	166,758,800	167,174,400	+0.2%	+415,600

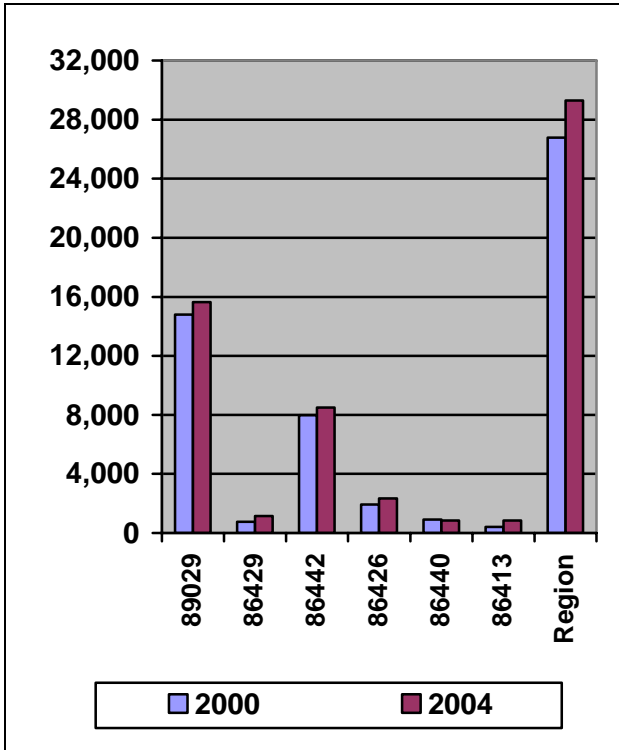
Source: County Business Patterns. ERSI Forecast for 2004.

Secondary sources reporting employment in the region were unreliable because of the cross-community employment migration patterns. This required making employment estimates for each community by place of work. Total employment estimates presented in Table 13 are derived using zip code secondary data provided by County Business Patterns and ERSI.

The County Business Patterns report only covered employment representing a portion of a community's total employment. Non-covered employment, employment representing self-employed individuals and firms, is not included in this database. This segment of employment was estimated using the ratio of total covered employment reported for each community in the region. This percentage was then applied against the total reported employment, covered and non-covered, for each community as reported by ERSI.



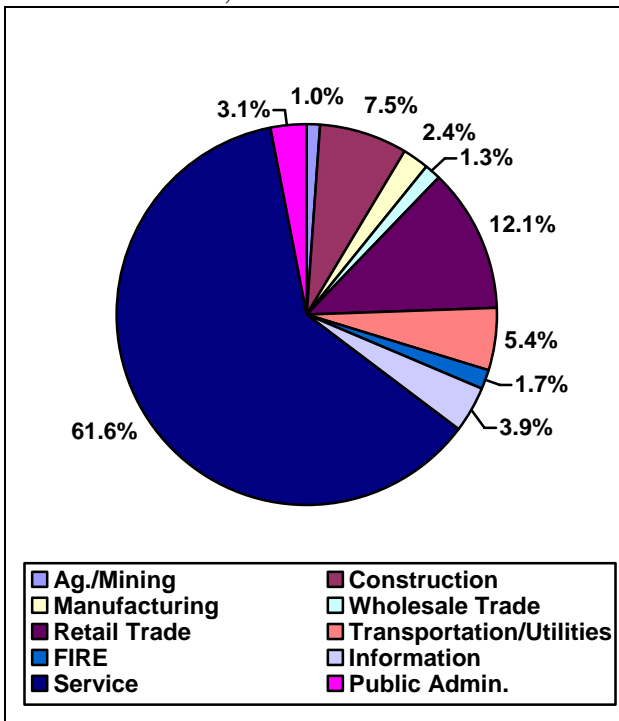
Figure 13. Total Employment Trends by Community and Region, 2000 and 2004.



**Summary:**

- Between 2000 and 2004, it was estimated that the region’s total employment increased 9.4% or 2,504 jobs.
- With the exception of Mohave Valley (86440), each community in the region experienced positive job growth between +5.6 percent in Laughlin and +105.4% in Golden Valley (86413).
- Over 53 percent of the region’s employment is located in Laughlin (89029).

Figure 14. Percent of Regional Employment by Economic Sector, 2004.



**Summary:**

- Nearly two-thirds of the total employment in the region is concentrated in the service sector. This is also consistent across most communities in the region.
- Retail Trade and Construction sectors represent 12.1% and 7.5%, respectively, of the total regional employment.

Table 14. Percent of Employment by Industry, 2004.

	Ag. Mining	Const- ruction	Manuf- actoring	Wholesale Trade	Retail Trade	Transport/ Utilities	Infor- mation	Finance Insurance Real Estate	Service	Public Admin.
<b>PERCENT</b>										
Laughlin (89029)	0.0%	4.1%	1.0%	0.3%	7.2%	5.3%	1.5%	4.7%	74.2%	1.7%
Bullhead City (86429)	1.3%	7.0%	1.7%	0.7%	12.5%	4.1%	1.4%	6.2%	62.2%	2.9%
Bullhead City (86442)	0.7%	8.7%	2.1%	1.0%	12.2%	2.7%	1.2%	4.4%	64.6%	2.3%
Fort Mohave (86426)	1.0%	11.1%	2.5%	1.5%	14.7%	5.4%	0.7%	5.2%	54.8%	3.0%
Mohave Valley (86440)	2.3%	11.9%	1.7%	3.8%	15.2%	6.6%	1.1%	3.0%	48.1%	6.3%
Golden Valley (86413)	1.5%	9.8%	5.1%	0.7%	13.5%	7.3%	2.0%	3.7%	52.7%	3.9%
Total Region	1.0%	7.5%	2.4%	1.3%	12.1%	5.4%	1.7%	3.9%	61.5%	3.1%
Clark County, NV	0.2%	12.0%	3.3%	2.5%	10.3%	4.1%	1.8%	7.7%	54.6%	3.5%
Mohave County, AZ	0.9%	11.5%	5.1%	1.7%	13.7%	5.1%	1.2%	5.1%	51.2%	4.5%
Nevada	1.0%	11.6%	4.2%	2.8%	10.5%	4.2%	1.8%	7.3%	52.3%	4.3%
Arizona	1.4%	10.4%	7.5%	2.7%	12.3%	4.5%	2.1%	8.6%	45.2%	5.4%
U.S.	1.7%	8.0%	10.7%	3.4%	11.6%	4.9%	2.3%	7.4%	45.1%	4.8%
<b>TOTAL EMPLOYMENT</b>	<b>Total</b>									
Laughlin (89029)	15,642									
Bullhead City (86429)	1,150									
Bullhead City (86442)	8,490									
Fort Mohave (86426)	2,332									
Mohave Valley (86440)	840									
Golden Valley (86413)	840									
Total Region	29,294									

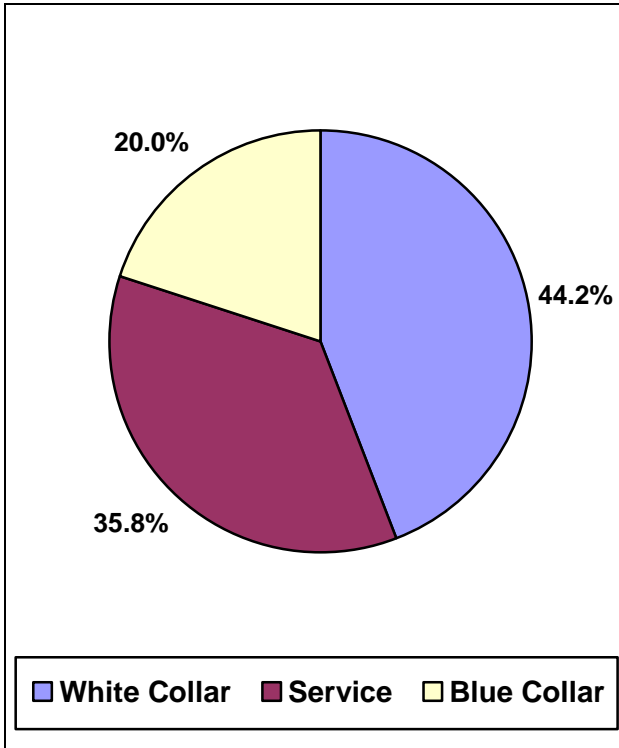
Source: County Business Patterns. ERSI Forecast for 2004.

Table 15. Percent Employment by Occupation, 2007.

Community (Zip Code)	White Collar	Service	Blue Collar
Laughlin (89029)	42.2%	45.1%	12.7%
Bullhead City (86429)	46.2%	34.2%	19.6%
Bullhead City (86442)	42.0%	38.6%	19.4%
Fort Mohave (86426)	47.9%	30.0%	22.1%
Mohave Valley (86440)	44.5%	27.5%	28.0%
Golden Valley (86413)	45.9%	24.1%	30.0%
Total Region	44.2%	35.8%	20.0%
Clark County, NV	51.6%	26.4%	22.0%
Mohave County, AZ	47.3%	26.8%	25.9%
Nevada	52.6%	24.4%	23.0%
Arizona	60.5%	17.5%	22.0%
U.S.	60.2%	16.5%	23.3%

Source: ERSI Forecast for 2007.

Figure 15. Regional Employment by Occupation, 2007.



**Summary:**

- ✚ White collar employees refer to employees who hold professional, managerial or administrative positions
- ✚ Blue collar employees refer to employees who perform manual labor.
- ✚ White collar employment represents 40-48% total employment in each community.
- ✚ Service employment represents between 45.1% in Laughlin (89029) and 24.1% in Golden Valley (86413).
- ✚ Blue collar employment represents between 30.0% in Golden Valley (86413) and 12.7% in Laughlin (89029).

Table 16. Employment by Occupation Type, 2007.

	Management/ Professional	Service	Sales/Office & Administrative Support	Farming/ Fishing/ Forestry	Construction/ Extraction/ Maintenance	Production/ Transportation/ Material Moving
<b>PERCENT</b>						
Laughlin (89029)	14.2%	45.1%	28.0%	0.2%	8.3%	4.3%
Bullhead City (86429)	22.9%	34.2%	23.3%	0.9%	12.6%	8.1%
Bullhead City (86442)	16.5%	38.6%	25.5%	0.3%	12.4%	6.8%
Fort Mohave (86426)	19.6%	30.0%	28.4%	0.2%	13.9%	8.1%
Mohave Valley (86440)	16.7%	27.6%	27.8%	0.9%	16.8%	10.3%
Golden Valley (86413)	19.0%	24.2%	26.9%	0.5%	14.8%	13.7%
Total Region	17.2%	35.6%	26.7%	0.5%	11.5%	8.5%
Clark County, NV	25.3%	26.4%	26.4%	0.1%	13.4%	8.5%
Mohave County, AZ	21.3%	26.8%	26.1%	0.3%	15.0%	10.7%
Nevada	26.4%	26.2%	24.4%	0.2%	13.7%	9.2%
Arizona	33.8%	17.5%	26.7%	0.4%	12.6%	9.0%
U.S.	34.9%	16.5%	25.3%	0.6%	10.5%	12.2%

Source: ERSI Forecast for 2007.

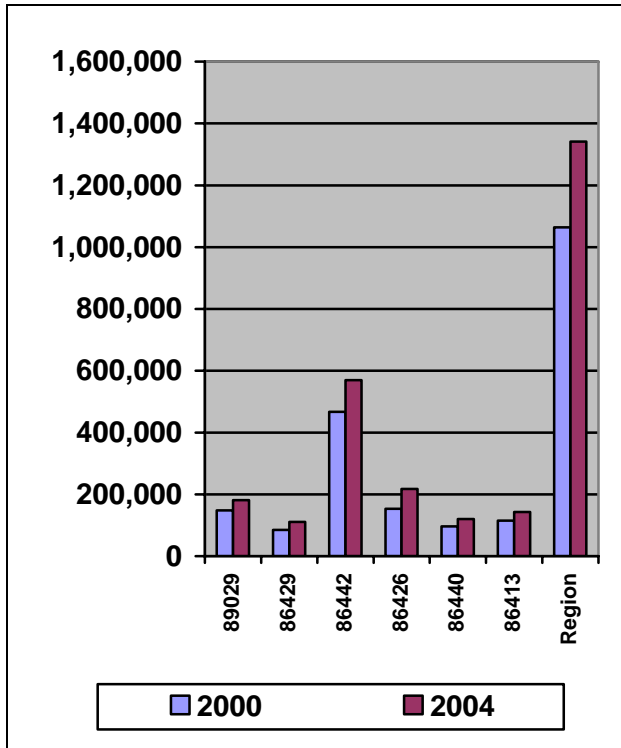
## INCOME

Table 17. Household Income, 2000 and 2004. (Adjusted for Inflation)

Community (Zip Code)	2000	2004	Percent Change	Number Change
<i>Thousand of Dollars</i>				
Laughlin (89029)	\$148,257	\$181,252	+22.2%	+33,005
Bullhead City (86429)	\$85,379	\$110,367	+29.3%	+24,988
Bullhead City (86442)	\$466,266	\$568,923	+22.0%	+102,657
Fort Mohave (86426)	\$152,985	\$217,700	+42.3%	+64,715
Mohave Valley (86440)	\$96,166	\$120,088	+24.9%	+23,922
Golden Valley (86413)	\$115,347	\$143,062	+24.0%	+27,715
Total Region	\$1,063,960	\$1,341,400	+26.1%	+\$277,440

Source: 2000 Census of Population and Housing. ERSI Forecast for 2004.

Figure 16. Household Income, 2000 and 2004. (Adjusted for Inflation) (\$000)



### Summary:

- + Between 2000 and 2004, regional Household Income increased 26.1 percent. All communities increased.
- + Fort Mohave (86426) reported the greatest percentage increase, +42.3%, followed by Bullhead City (86429) at 29.3% and Mohave Valley (86440) at 24.9%.
- + Bullhead City (86442) experienced the greatest dollar increase of over \$102 million followed by Fort Mohave (86440) at \$64,715 million and Laughlin (89029) at \$33,005 million.

Table 18. Percent of Households by Income, 2000.

	Less than \$15,000	\$15,000 to \$24,999	\$25,000 to \$34,999	\$35,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$99,999	\$100,000 to \$149,999	\$150,000 to \$199,999	\$200,000+	Total
<b>PERCENT</b>										
Laughlin (89029)	11.0%	15.8%	20.1%	19.0%	20.8%	8.0%	2.6%	1.7%	0.9%	100.0%
Bullhead City (86449)	15.8%	20.3%	19.7%	21.3%	13.3%	4.7%	3.1%	0.3%	1.6%	100.0%
Bullhead City (86442)	19.3%	23.2%	16.7%	19.5%	12.9%	4.6%	2.2%	0.4%	1.0%	100.0%
Fort Mohave (86426)	12.8%	15.5%	17.9%	19.6%	21.0%	9.6%	2.0%	0.8%	0.7%	100.0%
Mohave Valley (86440)	18.6%	16.6%	18.1%	22.6%	15.2%	5.6%	2.9%	0.4%	0.0%	100.0%
Golden Valley (86413)	23.8%	21.2%	17.3%	17.4%	12.4%	4.1%	2.5%	0.3%	1.0%	100.0%
Total Region	18.7%	20.1%	17.1%	19.2%	15.2%	5.7%	2.4%	0.6%	0.9%	100.0%
Clark County, NV	12.2%	12.4%	13.1%	18.1%	21.5%	11.1%	7.5%	1.9%	2.1%	100.0%
Mohave County, AZ	18.7%	19.7%	17.0%	18.5%	15.2%	6.2%	3.1%	0.6%	1.0%	100.0%
Nevada	12.4%	12.3%	13.1%	18.1%	21.7%	11.1%	7.4%	1.8%	2.1%	100.0%
Arizona	14.9%	13.9%	14.0%	17.5%	19.2%	9.7%	6.9%	1.9%	2.0%	100.0%
U.S.	15.8%	12.8%	12.8%	16.5%	19.5%	10.2%	7.7%	2.2%	2.4%	100.0%

Source: 2000 Census of Population and Housing.

Table 19. Percent of Households by Income, 2004.

	Less than \$15,000	\$15,000 to \$24,999	\$25,000 to \$34,999	\$35,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$99,999	\$100,000 to \$149,999	\$150,000 to \$199,999	\$200,000+	Total
<b>PERCENT</b>										
Laughlin (89029)	8.9%	13.6%	15.0%	20.5%	24.5%	8.7%	5.6%	1.3%	1.9%	100.0%
Bullhead City (86449)	13.9%	14.6%	17.5%	22.7%	16.0%	6.8%	5.3%	1.0%	2.2%	100.0%
Bullhead City (86442)	15.8%	19.7%	15.5%	20.7%	15.3%	6.2%	4.2%	1.0%	1.5%	100.0%
Fort Mohave (86426)	9.5%	13.1%	15.9%	16.4%	24.0%	11.5%	7.3%	0.8%	1.5%	100.0%
Mohave Valley (86440)	14.3%	15.3%	13.0%	21.6%	20.8%	8.2%	6.1%	0.6%	0.2%	100.0%
Golden Valley (86413)	20.8%	18.6%	16.4%	16.6%	15.6%	5.7%	4.5%	0.5%	1.4%	100.0%
Total Region	15.3%	17.2%	15.2%	19.4%	18.0%	7.5%	5.1%	0.9%	1.4%	100.0%
Clark County, NV	9.7%	9.6%	11.2%	16.2%	21.5%	13.6%	12.0%	3.1%	3.3%	100.0%
Mohave County, AZ	14.4%	15.4%	15.4%	18.6%	17.9%	9.0%	6.3%	1.4%	1.7%	100.0%
Nevada	10.3%	10.2%	11.2%	16.6%	22.0%	12.5%	11.4%	2.8%	3.1%	100.0%
Arizona	11.7%	11.1%	11.5%	16.4%	20.0%	11.5%	11.3%	3.0%	3.4%	100.0%
U.S.	13.5%	11.2%	11.3%	15.7%	19.3%	11.5%	10.9%	3.0%	3.5%	100.0%

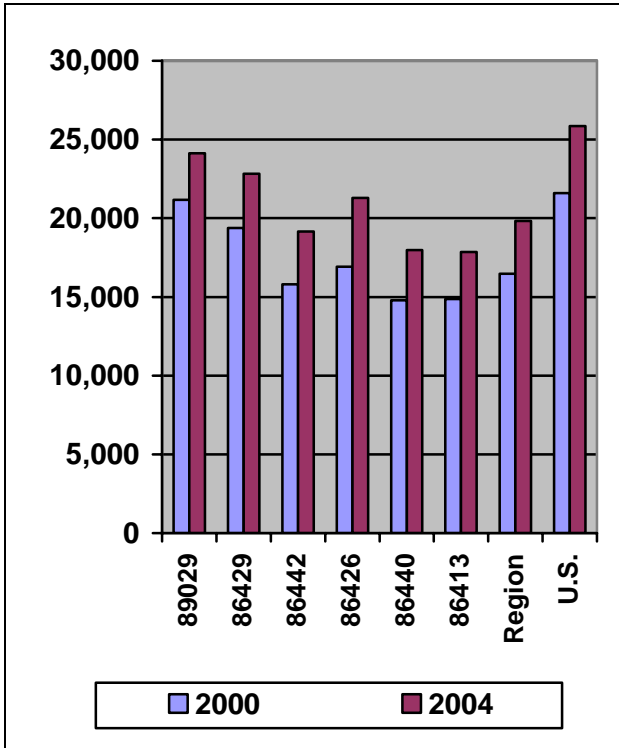
Source: 2000 Census of Population and Housing. ERSI Forecast for 2004.

Table 20. Per Capita Income, 2000 and 2004.

Community (Zip Code)	2000	2004	Percent Change	Number Change
Laughlin (89029)	\$21,160	\$24,124	+14.0%	+\$2,964
Bullhead City (86429)	\$19,381	\$22,839	+17.8%	+\$3,458
Bullhead City (86442)	\$15,803	\$19,160	+21.2%	+\$3,357
Fort Mohave (86426)	\$16,918	\$21,292	+25.9%	+\$4,374
Mohave Valley (86440)	\$14,796	\$17,984	+21.5%	+\$3,188
Golden Valley (86413)	\$14,876	\$17,857	+20.0%	+\$2,981
Total Region	\$16,481	\$19,823	+20.2%	+\$3,342
Clark County, NV	\$21,785	\$25,866	+18.7%	+\$4,081
Mohave County, AZ	\$16,788	\$20,882	+24.4%	+\$4,094
Nevada	\$21,989	\$26,208	+19.2%	+\$4,219
Arizona	\$20,275	\$25,625	+26.4%	+\$5,350
U.S.	\$21,587	\$25,866	+19.8%	+\$4,279

Source: 2000 Census of Population and Housing. ERSI Forecast for 2004.

Figure 17. Per Capita Income, 2000 and 2004.



**Summary:**

- Between 2000 and 2004, per capita income has grown approximately 20% in the region.
- Although per capita income has experienced double digit percentage growth between 2000 and 2004, every community in the region still lags behind their respective state and U.S. averages.
- In 2004, Laughlin (89029) reported the greatest per capita income of \$24,124, followed by Bullhead City (86429) at \$22,839 and Fort Mohave (86429) at \$21,292.

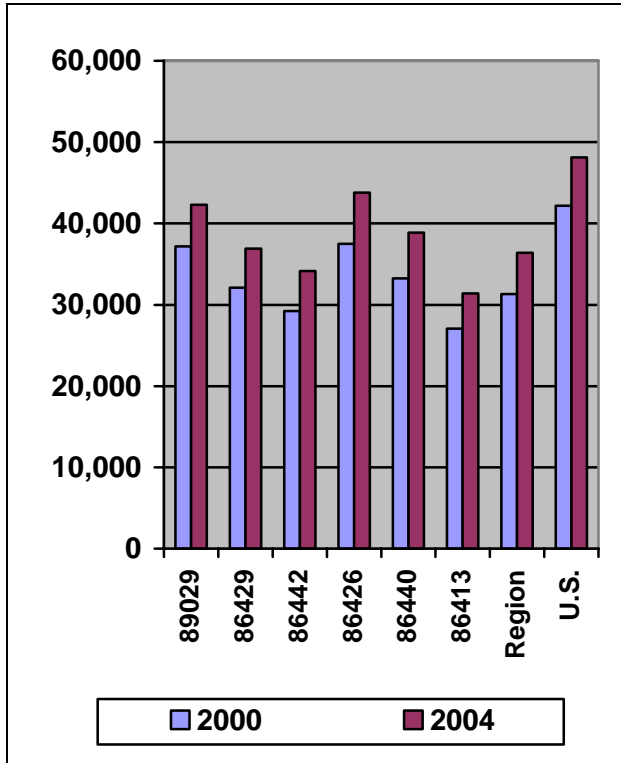


Table 21. Median Household Income, 2000 and 2004.

Community (Zip Code)	2000	2004	Percent Change	Number Change
Laughlin (89029)	\$37,179	\$42,307	+13.8%	+\$5,128
Bullhead City (86429)	\$32,108	\$36,891	+14.9%	+\$4,783
Bullhead City (86442)	\$29,214	\$34,162	+16.9%	+\$4,948
Fort Mohave (86426)	\$37,479	\$43,775	+16.8%	+\$6,296
Mohave Valley (86440)	\$33,229	\$38,853	+16.9%	+\$5,624
Golden Valley (86413)	\$27,060	\$31,400	+16.0%	+\$4,340
Total Region	\$31,303	\$36,399	+16.3%	+\$5,086
Clark County, NV	\$44,650	\$53,307	+19.4%	+\$8,657
Mohave County, AZ	\$31,523	\$38,350	+21.7%	+\$6,827
Nevada	\$44,614	\$51,572	+15.6%	+\$6,958
Arizona	\$40,582	\$49,168	+21.1%	+\$8,586
U.S.	\$42,164	\$48,124	+14.1%	+\$5,960

Source: 2000 Census of Population and Housing. ERSI Forecast for 2004.

Figure 18. Median Household Income, 2000 and 2004.



**Summary:**

- Median household income is the midpoint range of all reported household incomes.
- Overall, the region's median household income increased 16.3%. This percentage growth rate is consistent across most communities except Laughlin at 19.32%.
- Median household income trends follow similar per capita and average household trends; lagging behind respective county, state and U.S. averages.

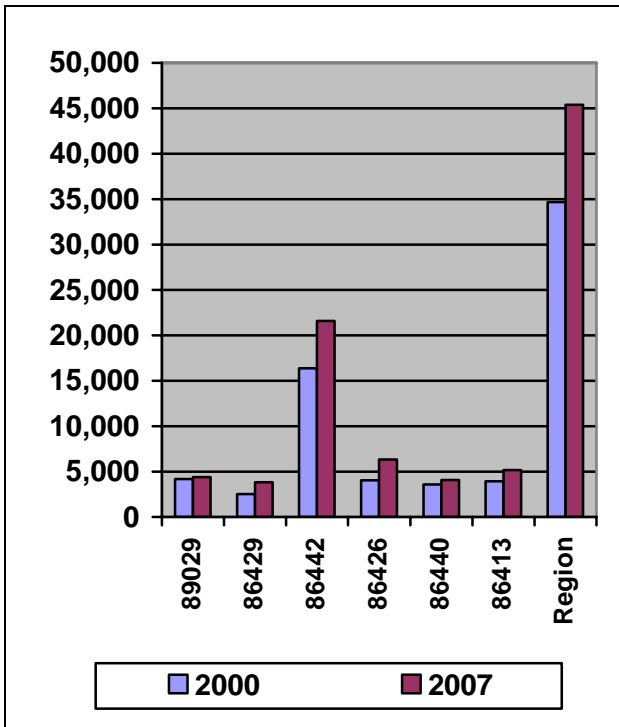
# HOUSING

Table 22. Housing Units, 2000 and 2007.

Community (Zip Code)	2000	2007	Percent Change	Number Change
Laughlin (89029)	4,180	4,390	+5.02%	+210
Bullhead City (86429)	2,542	3,828	+50.59%	+1,286
Bullhead City (86442)	16,358	21,568	+31.85%	+5,210
Fort Mohave (86426)	4,048	6,338	+56.57%	+2,290
Mohave Valley (86440)	3,605	4,095	+13.59%	+490
Golden Valley (86413)	3,948	5,176	+31.10%	+1,228
Total Region	34,681	45,395	+30.89%	+10,714
Clark County, NV	559,799	776,827	+38.77%	+217,028
Mohave County, AZ	80,062	104,505	+30.53%	+24,443
Nevada	827,457	1,101,115	+33.07%	+273,658
Arizona	2,189,189	2,730,592	+24.73%	+541,403
U.S.	115,904,641	128,035,492	+10.47%	+12,130,851

Source: 2000 Census of Population and Housing. ERSI Forecast for 2007.

Figure 19. Housing Units, 2000 and 2007.



**Summary:**

- + + Strong positive housing unit construction is reported for all communities in the region.
- + + Between 2000 and 2007, the region added 10,714 new housing units. However, recent housing developments in the region has experienced a significant slow down in the last year.

Table 23. Owner Occupied, Renter Occupied and Vacant Housing, 2000 and 2007.

	2000 Owner Occupied	2000 Renter Occupied	2000 Vacant	2000 Total	2007 Owner Occupied	2007 Renter Occupied	2007 Vacant	2007 Total
<b>NUMBER</b>								
Laughlin (89029)	1,187	2,015	978	4,180	1,172	2,146	1,072	4,390
Bullhead City (86449)	1,040	955	547	2,542	1,657	1,390	781	3,828
Bullhead City (86442)	7,623	4,580	4,155	16,358	10,310	5,801	5,457	21,568
Fort Mohave (86426)	2,724	688	636	4,048	4,303	1,007	1,028	6,338
Mohave Valley (86440)	1,932	588	1,085	3,605	2,211	618	1,266	4,095
Golden Valley (86413)	2,700	478	770	3,948	3,576	590	1,010	5,176
Total Region	17,224	9,304	8,171	34,681	23,229	11,552	10,614	43,395
<b>PERCENT</b>								
Laughlin (89029)	28.4%	48.2%	23.4%	100.0%	26.7%	48.9%	24.4%	100.0%
Bullhead City (86449)	40.9%	37.6%	21.6%	100.0%	43.3%	36.3%	20.4%	100.0%
Bullhead City (86442)	46.6%	28.0%	25.4%	100.0%	47.8%	26.9%	25.3%	100.0%
Fort Mohave (86426)	67.3%	17.0%	15.7%	100.0%	67.9%	15.9%	16.2%	100.0%
Mohave Valley (86440)	53.6%	16.3%	30.1%	100.0%	54.0%	15.1%	30.9%	100.0%
Golden Valley (86413)	68.4%	12.1%	19.5%	100.0%	69.1%	11.4%	19.5%	100.0%
Total Region	49.6%	26.9%	23.5%	100.0%	51.1%	25.5%	23.4%	100.0%
Clark County, NV	54.1%	37.4%	8.5%	100.0%	55.3%	35.4%	9.3%	100.0%
Mohave County, AZ	57.7%	20.7%	21.5%	100.0%	58.6%	19.7%	21.7%	100.0%
Nevada	55.3%	35.5%	9.2%	100.0%	56.5%	33.8%	9.7%	100.0%
Arizona	59.1%	27.8%	13.1%	100.0%	59.6%	26.6%	13.8%	100.0%
U.S.	60.2%	30.8%	7.0%	100.0%	61.3%	28.8%	9.9%	100.0%

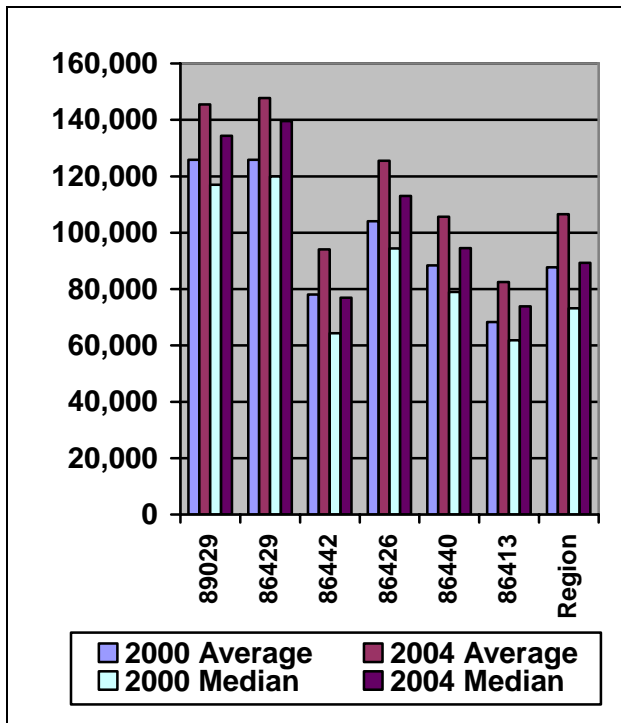
Source: 2000 Census of Population and Housing. ERSI Forecast for 2007.

Table 24. Average and Median Housing Values, 2000 and 2004. (Adjusted for Inflation)

Community (Zip Code)	2000 Average	2000 Median	2004 Average	2004 Median
Laughlin (89029)	\$125,838	\$116,984	\$145,464	\$134,376
Bullhead City (86429)	\$125,886	\$119,949	\$147,706	\$139,630
Bullhead City (86442)	\$78,095	\$64,321	\$94,072	\$76,967
Fort Mohave (86426)	\$104,103	\$94,450	\$125,468	\$113,003
Mohave Valley (86440)	\$88,428	\$78,991	\$105,613	\$94,525
Golden Valley (86413)	\$68,280	\$61,850	\$82,551	\$73,844
Needles (92363)	\$88,390	\$67,222	\$120,854	\$101,517
Total Region	\$87,742	\$73,150	\$106,576	\$89,349
Clark County, NV	\$153,519	\$132,186	\$197,493	\$218,119
Mohave County, AZ	\$95,265	\$79,547	\$114,233	\$97,323
Nevada	\$157,238	\$132,514	\$193,388	\$161,800
Arizona	\$139,461	\$109,424	\$164,624	\$129,431
U.S.	\$151,910	\$111,833	\$190,750	\$134,822

Source: 2000 Census of Population and Housing. ERSI Forecast for 2004.

Figure 20. Average and Median Housing Values, 2000 and 2004. (Adjusted for Inflation).



**Summary:**

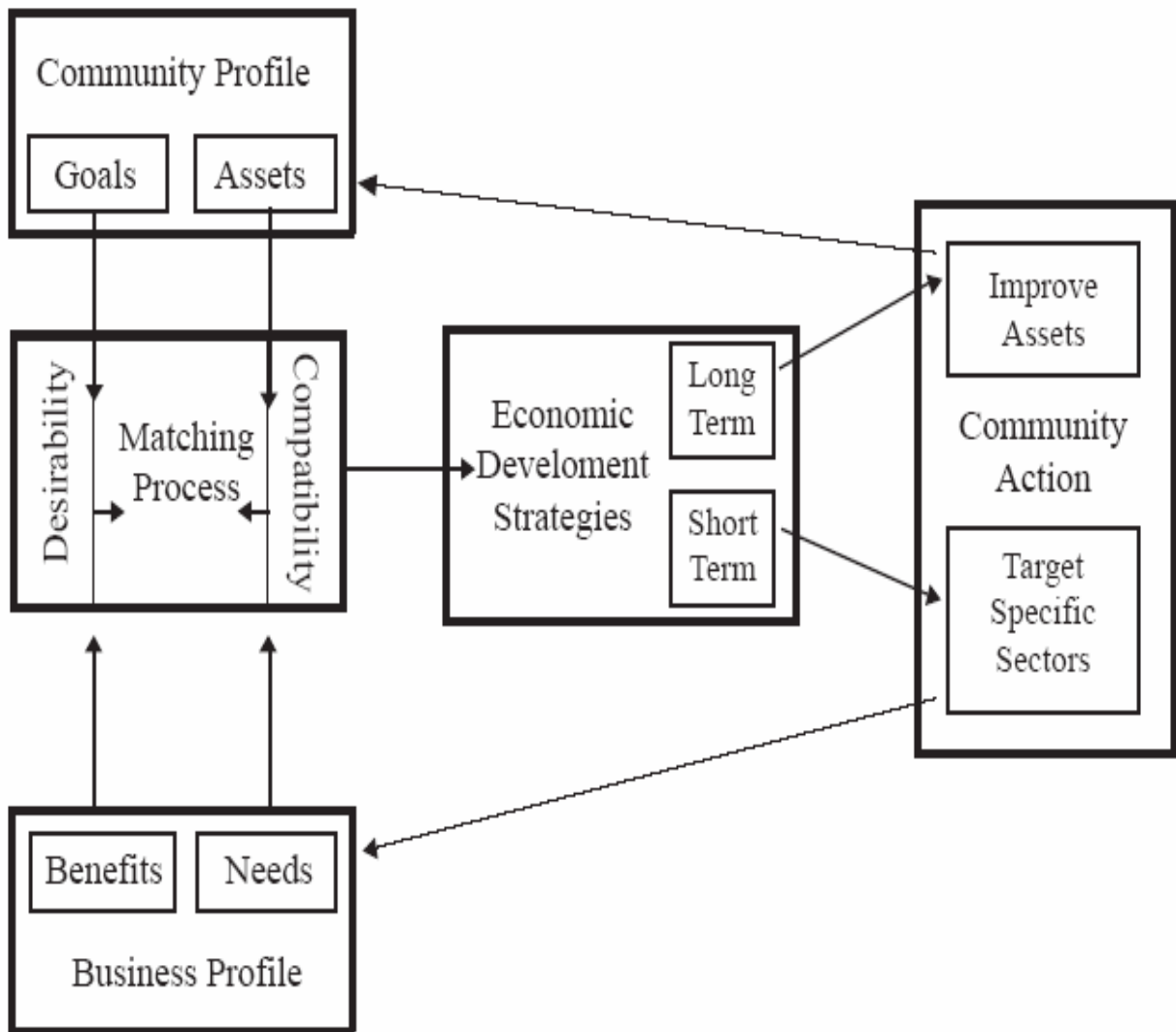
- Between 2000 and 2004, average and median housing values show strong growth.
- Laughlin (89029) and Bullhead City (86429) report the highest average and median values of approximately \$145,000 and \$138,000, respectively. Fort Mohave (86426) and Needles (92363) also report average and median values above the regional averages.

## **COMMUNITY BUSINESS MATCHING (CBM) CONCEPTUAL MODEL**

The objective of the Community Business Matching (CBM) model is to assist communities in targeted economic development. First, the community must quantify their goals and assets and then determine if any businesses are likely to both meet the community's goals for economic development and find the community an attractive place to locate. The best "match" occurs when the goals of the community correspond to the benefits provided by a business and when the assets of the community correspond with the demands of the business. The CBM process also provides an opportunity for the community to refine its economic development strategies based on the knowledge gained from possible industry matches identified by the model.

The two dimensions of the CBM model are captured in desirability and compatibility indices that rank potential matches. The desirability index makes use of objective measures of a new or expanded business' impacts on a community along dimensions such as job growth, environmental impacts, fiscal impacts and quality of life issues. The desirability of a firm or sector is determined by incorporating community weights on the importance of each of these impacts. Compatibility index compares available community assets with business asset needs. Both desirability and compatibility indices are further discussed in the following pages. Figure 21 provides the general framework for the CBM procedure.

Figure 21. CBM General Framework.



## Community Profile – Desirability Framework

Calculation of the desirability index follows four primary goals including: Economic Efficiency, Employment Opportunities, Protection of the Environment and Existence Quality of Life for local residents. Economic Efficiency measures the potential for business and worker revenues to remain in the local economy. Employment Opportunities measures both the quantity and the quality of jobs offered by a business. Environmental Protection measures a business’s stewardship of natural resources, including air and water quality. Existence Quality of Life describes the impact of available jobs on the well-being of the community. Quantifiable indicators are used to identify the underlying characteristics of each goal. Each goal and associated indicators are ranked by communities and compared to individual business sector responses to current operations and needs. Figure 22 and Table 25 describes the framework to determine desirability index.

Figure 22. Desirability Framework.

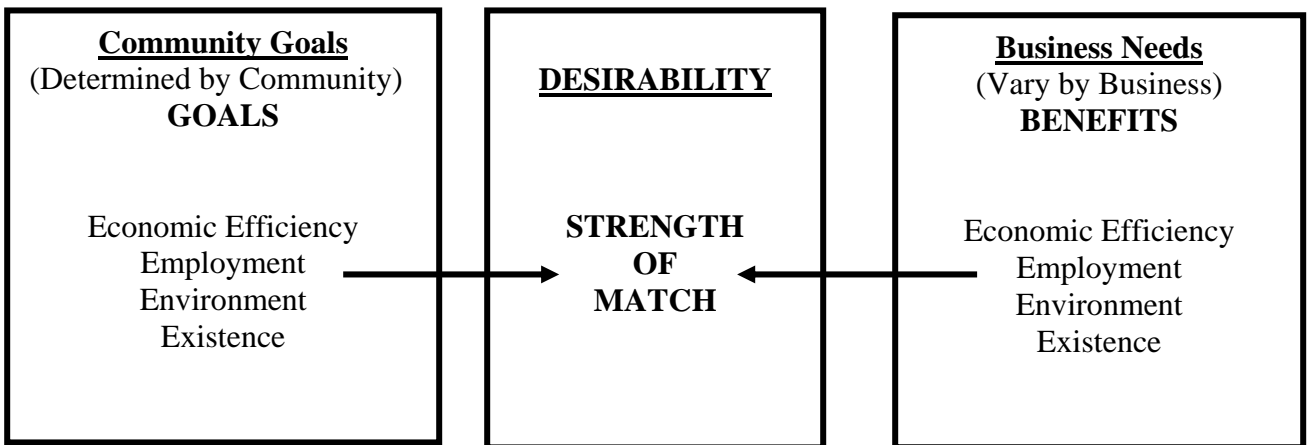


Table 25. CBM Community Goals and Indicators.

<b>Economic Efficiency</b>
Every New Job Generates Additional Jobs in the Community
New Businesses Return Capital to the Local Economy
New Businesses use Locally Available Resources
New Businesses Increase the Local Economy
<b>Employment Opportunity</b>
New Jobs Pay at or Above Livable Wage
New Jobs are Fulltime and Permanent
New Jobs Offer Benefits
New Jobs Provide Training Programs to Increase Worker Skills
<b>Environmental Protection</b>
New Businesses Make Only EPA Compliant Discharges to Water
New Businesses Report all Toxic Releases
New Businesses are in Compliance With Hazardous Waste Management
New Businesses are not Listed as Participants in an Active or Archived Superfund Report
<b>Existence Quality of Life</b>
New Businesses Effectively Increase the Average Local Wage
New Businesses Increase the Local Tax Base
New Businesses are Committed to the Community

"New" implies that one or more businesses in a given industry have expanded or joined the local economy.

### **Business Profile – Compatibility Framework**

The compatibility index measures the fit between a community's assets and an industry's need for those assets. For example, one industry might be best served by sites near a major airport while another might demand a highly skilled labor force. Communities that lack these assets will likely face challenges in targeting these industries and may decide to develop these assets to assist in their targeting efforts. At the same time, businesses location decisions are complicated and often based on a range of criteria (Goetz, 1997; Reum and Harris, 2006). These criteria include available land and buildings, access to transportation, utility and telecommunications infrastructure, labor skills and costs and quality of life (Leatherman, et



al., 2007 this volume; McNamara et al., 1995; Glaser and Bardo, 1991). These business demands are matched with community assets, which quantify the availability of these resources at the chosen site. Figure 23 and Table 26 describes the framework to determine compatibility index.

Figure 23. Compatibility Framework.

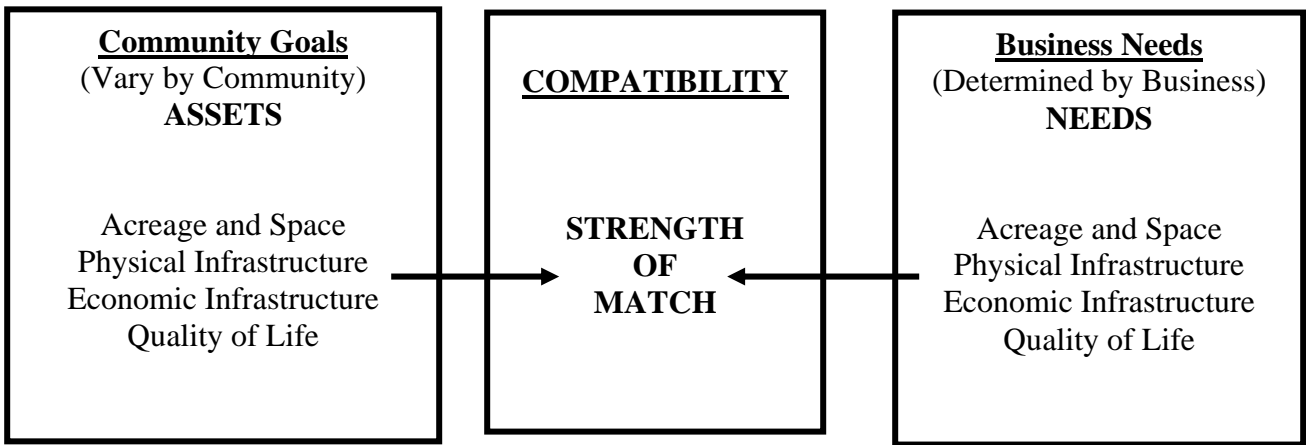


Table 26. Indicators of Community Assets.

<b>Environmental Protection</b>
Local Wastewater Remediation Costs
Local Toxic Release Cleanup Costs
Hazardous Wastes Remediation Costs
Superfund Redevelopment Costs
EPA Air Quality Remediation Costs
<b>Quality of Life</b>
Average Wage Per Job
Living Wage Per Job
Employee Benefits
Local Tax Base
Income Distribution
Proprietor Income

Table 26. Indicators of Community Assets. (con't...)

<b>Available Land and Building Space</b>
Available Undeveloped Land
Available Undeveloped Land with Infrastructure
Available Undeveloped Land with Partial Infrastructure
Available Undeveloped Land near Infrastructure
Available Warehouse Space
Available Manufacturing/Operating Space
Available Office Space
Available Retail Space
<b>Infrastructure and Business Development Resource Availability</b>
3-Phase Electric Power
Natural Gas Pipeline
Internet/High Speed Telecommunications
High-Volume Water Supply
High Volume Wastewater Supply
High-Volume Solid Waste Disposal
Access to Ponds and Streams
Available Commercial Sites with Room for Future Expansion
Mass Transportation for Workers
Community Job Training Programs
Local Development Assistance
State Development Assistance
Competitive Commercial Real Estate Sales Market
Competitive Commercial Real Estate Leasing
Community College
Quality Health Care
<b>Business Costs, Resources, and Other Indices</b>
Local Labor Costs
Local Business Tax Rate
Average Worker's Compensation Tax Rate
Local Commercial Loan Rate
Cost of Living Index
Retail Shopping Expenditures
Local Crime Rate

## **COLORADO RIVER REGION CBM PROCESS**

The first step in the CBM process for the Colorado River region was to form a regional advisory committee whose primary purpose was to assist in leading the CBM community process. A 30-member advisory committee was assembled that represented diversity in the region by individual communities and affiliated groups (i.e., businesses/industry, local government, etc.). This diversity was important because any future strategic planning and implementation would require this committee's leadership abilities. The committee met monthly and participated in several strategic planning sessions to establish procedures for collecting primary regional data specific to regional economic development goals and assessing regional assets that contribute to economic development.

Regional and community economic development goals and priorities were determined through four survey sessions held in each community over a period of four days. During the planning sessions, advisory committee members identified potential survey participants that meet specific criteria including: (1) survey groups needed to represent diversity across the region and (2) that they were able to meet in groups for approximately one hour to complete a goal and priorities survey for economic development. This survey was facilitated by University of Nevada Cooperative Extension and Center for Economic Development personnel. Diversity in the region was achieved by having representation in each session from the following groups: business/industry, health care, local government, education, utilities, non-profits, developers and entrepreneurs, retirees youth groups, transportation and financial institutions. A minimum of 20 participants were required for each survey session.

A total of 81 residents completed the seven page goals and priorities for economic development questionnaire (Appendix A). This questionnaire required participants to choose

between two goals/priorities as to which is more important to them and then by how much through a rating scale between 1 and 9 (1=equally important to 9=extremely more important). This format made participants make trade-offs as it pertained to regional economic development goals and priorities. For example, if the goal/priority for a community was to expand commercial business operations that could include sites on or near environmentally sensitive lands, then a choice needed to be made between business expansion, environmental protection, “or both being equally” important. Each goal and indicator for economic development was compared to each other.

The second part of the CBM process involved collecting regional asset data following a specific questionnaire (Appendix B). Select advisory committee members were requested to lead this process with the assistance of University personnel. Although some of this data was immediately available, it did require assistance from local government and economic development agencies to complete the survey.

All data collected at the community level, goals/priorities and community asset, was entered into the CBM computer model and analyzed on a regional and individual community basis. Regional and community primary data was then matched with primary data collected from the 50 fastest growing North American Industrial Classification System (NAICS) sectors. Over 2,500 actual businesses representing the 50 NAICS sectors had been telephoned surveyed over the last two years asking specific questions related to business operations and factors important when considering expansion or relocation decisions.

Matching community and business responses generated a desirability and compatibility index that is presented in a scatter plot with one axis representing desirability index and the other axis representing compatibility index. Index results were measured

between 0.00 and 1.00 and interpreted two ways. First, the desirability index measures the goals and priorities of the community against the attributes that individual NAICS sectors look for in a community when making expansion or relocation decisions. A perfect 1.0 index indicates that the community's goals perfectly match the NAICS sector goals and priorities when considering a community. Second, the compatibility index measures how well a community's existing assets match with the NAICS sector asset needs. A perfect 1.0 index indicates that the community has the required assets to meet the NAICS sector needs. In some instances, a result may show a high desirability index (i.e. between .90 to 1.0) but a low compatibility index (i.e. between .60 to .70). This can be interpreted as the NAICS sector meeting the goals of the community but the community not meeting the asset needs of the NAICS sector and reducing the probability of attracting firms in that specific NAICS sector. A community could then use this result to develop short and long-term strategies to improve assets thus creating a better overall match with a highly desirable industry. On the other hand, a community may have a low desirability index and a high compatibility index that indicates the NAICS sector does not meet community goals but the community does have the necessary assets to meet the NAICS sector needs. Normally a community would decide to not put recruiting efforts into this type of NAICS sector because without the support of the community, it reduces the probability of success. The best match is when both the desirability and compatibility index are high (i.e. 0.80 to 1.0).

## **COLORADO RIVER REGION AND INDIVIDUAL COMMUNITY CBM RESULTS**

Results are presented for three study areas: (1) Colorado River Region; (2) Laughlin; and (3) Bullhead City and surrounding Arizona Communities. For each study area, economic development goals (community surveys), economic development priorities (community surveys) and best match industry results are reported. The overall goal of this analysis is to identify NAICS sectors that have the best desirability and compatibility match (i.e. highest index measures) for the Colorado River region and each individual community. However, additional emphasis is put upon the desirability indices which reflect resident economic development goals and priorities for the Colorado River region. A high desirability index and low compatibility index match could be strengthened if compatibility issues (i.e. warehousing, infrastructure, etc.) are address through economic development investment.

### **Colorado River Region**

Figure 24 presents the regional economic development goals generated through community surveys administered to 81 residents in the Colorado River region. Nearly 36% of respondents expressed quality of life as the top goal for the regional economy. Employment opportunities and environmental protection were also important at 28.1% and 18.5%, respectively.

Figure 25 reports the Colorado River region's priorities for economic development. The highest priority expressed by respondents was to increase business contributions in the Colorado River region at 13.1%. Other priorities receiving high responses include: no hazardous waste (10.1%), new jobs offer training (9.0%), increased local average wage (8.2%) and new jobs above living wage (8.1%).

Figure 24. Colorado River Regional Economic Development Goals.

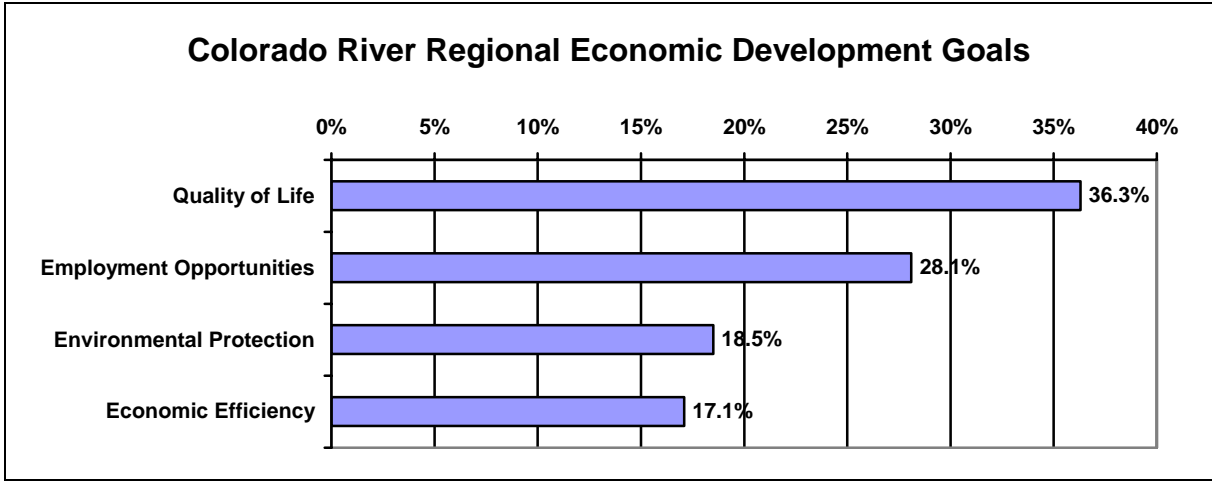


Figure 25. Colorado River Regional Economic Development Priorities.

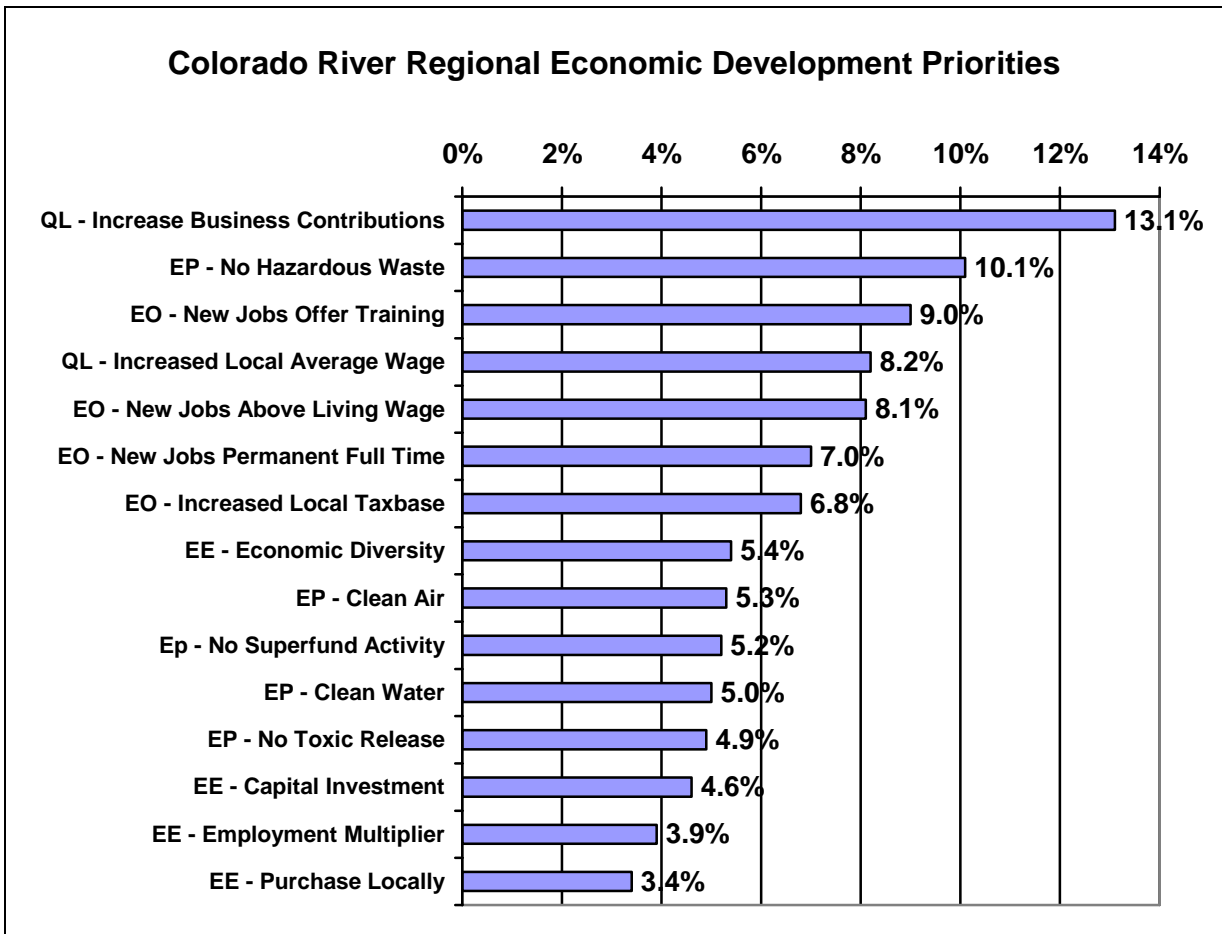
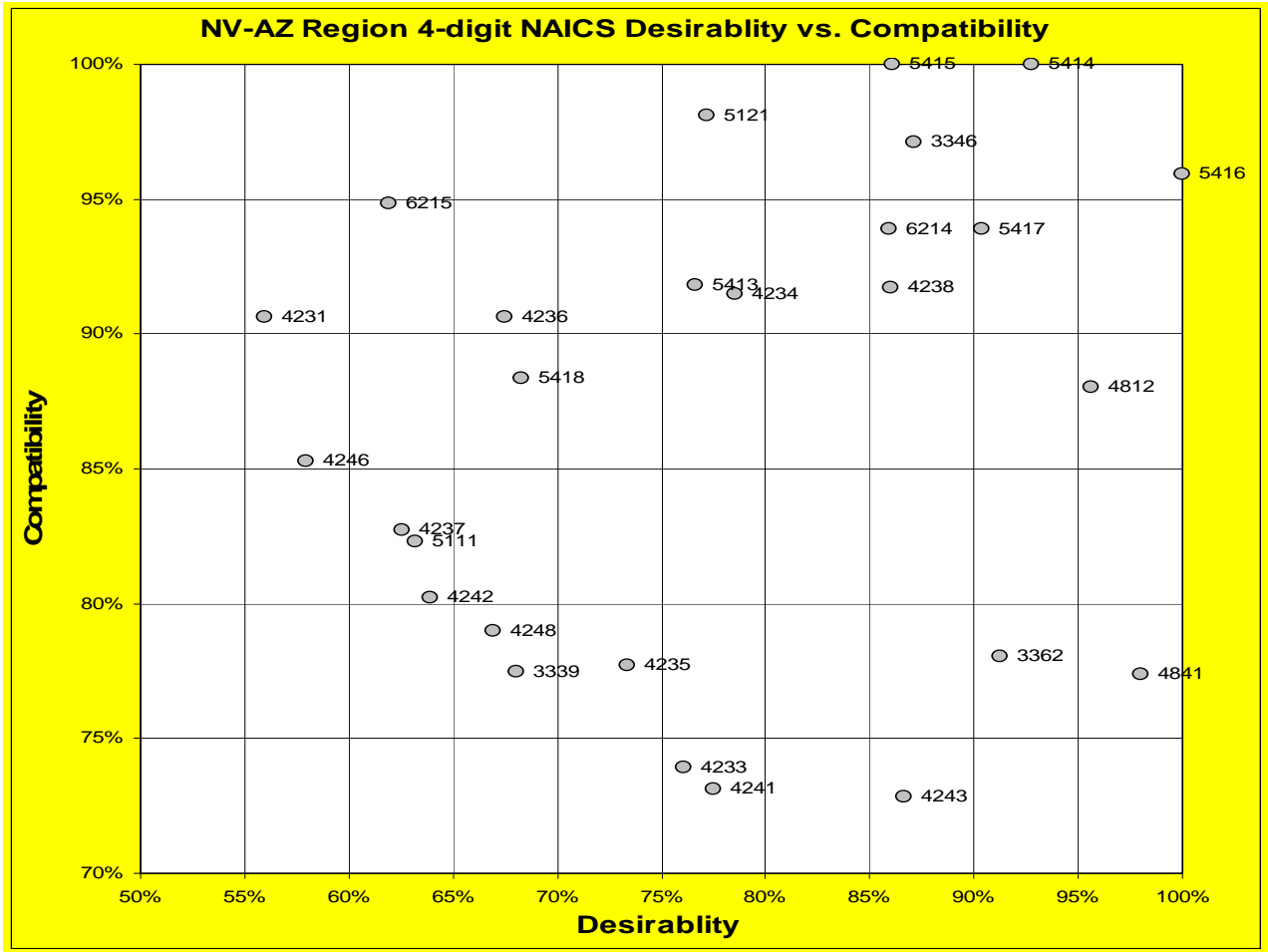


Figure 26 shows the best match industries, considering community desirability and industry compatibility, by 4-digit NAICS for the Colorado River region. The most desirable industry is 5416 (management, scientific and consulting services) with a perfect match of 1.0. This means that this industry perfectly meets the regional goals for economic development. The most compatible industries are 5414 (specialized design services) and 5415 (computer system designs and related services) with a perfect match of 1.0. This means that the Colorado River region assets meet both NAICS sector needs. Full desirability and compatibility index measures for each NAICS sector is presented in Appendix C.

Figure 26. Colorado River Regional Economic Development Best Match Industries.





NAICS sectors with strong desirability and compatibility index matches (.85 or greater) are presented in Table 27. These NAICS sectors are considered as having the “Best Match” and should be strongly considered in any targeted economic development recruitment strategy development for the Colorado River region. More detailed descriptions and information for the best matched NAICS sectors is presented in Appendix D.

Table 27. Colorado River Region “Best Match” NAICS Sector with Desirability and Compatibility Indices 0.85 or greater.

NAICS	Description	Desirability	Compatibility
5416	Management, Scientific, and Technical Consulting Service	1.000000	0.959525
5414	Specialized Design Services	0.927677	0.999801
4812	Nonscheduled Air Transportation	0.956396	0.880457
5417	Scientific Research and Development Services	0.904167	0.938999
3346	Manufacturing and Reproducing Magnetic and Optical Media	0.871339	0.971191
5415	Computer Systems Design and Related Services	0.860522	1.000000
4238	Machinery, Equipment, and Supplies Merchant Wholesalers	0.860000	0.917423
6214	Outpatient Care Center	0.859045	0.938767

Table 28 reports the NAICS sectors with desirability indices 0.85 or greater. The importance or value of the desirability index is that the stronger the index, the more acceptable a NAICS sector meets regional economic development goals. Many of these NAICS sectors are also reported in Table 27, but an additional three NAICS sectors (4841, 3362 and 4243) show a strong desirability index and relatively weak compatibility index. This means the regions current assets do not adequately meet these NACIS sector asset needs. However, through aggressive economic development planning, asset deficiencies or weaknesses could be improved to strengthen the overall match. These three sectors should still be considered as having potential in the region and should be further studied and considered for short and long-term strategic economic development planning.

Table 28. Desirability Index Rankings, 0.85 or Greater.

NAICS	Description	Desirability Index	Compatibility Index
5416	Management, Scientific, and Technical Consulting Service	1.000000	0.959525
<b>4841</b>	<b>General Freight Trucking</b>	<b>0.980414</b>	<b>0.773667</b>
4812	Nonscheduled Air Transportation	0.956396	0.880457
5414	Specialized Design Services	0.927677	0.999801
<b>3362</b>	<b>Motor Vehicle Body and Trailer Manufacturing</b>	<b>0.912956</b>	<b>0.780388</b>
5417	Scientific Research and Development	0.904167	0.938999
3346	Manufacturing and Reproducing Magnetic and Optical Media	0.871339	0.971191
<b>4243</b>	<b>Apparel, Piece Goods, and Notions Merchant Wholesalers</b>	<b>0.866205</b>	<b>0.728434</b>
5415	Computer Systems Design and Related Services	0.860522	1.000000
6214	Outpatient Care Center	0.859045	0.938767

**Laughlin**

Figure 27 presents the regional economic development goals generated through community surveys administered to 31 residents in Laughlin. Over 40% of respondents expressed quality of life as the top goal for the regional economy. Employment opportunities and environmental protection are also important with 23.6% and 20.2%, respectively.

Figure 28 reports Laughlin priorities for economic development. The highest priority expressed by respondents was to increase business contributions in Laughlin at 15.4%. Other priorities receiving high responses include: no hazardous waste (7.8%), new jobs offer training (9.1%), increased local average wage (9.4%) and new jobs above living wage (8.7%).

Figure 27. Laughlin Economic Development Goals.

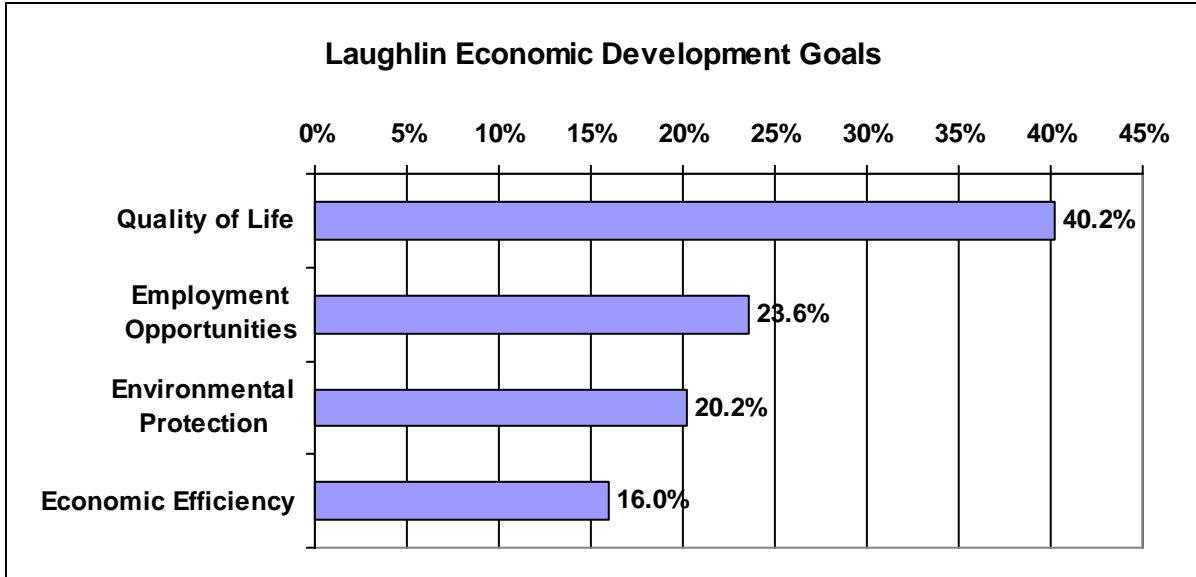


Figure 28. Laughlin Economic Development Priorities.

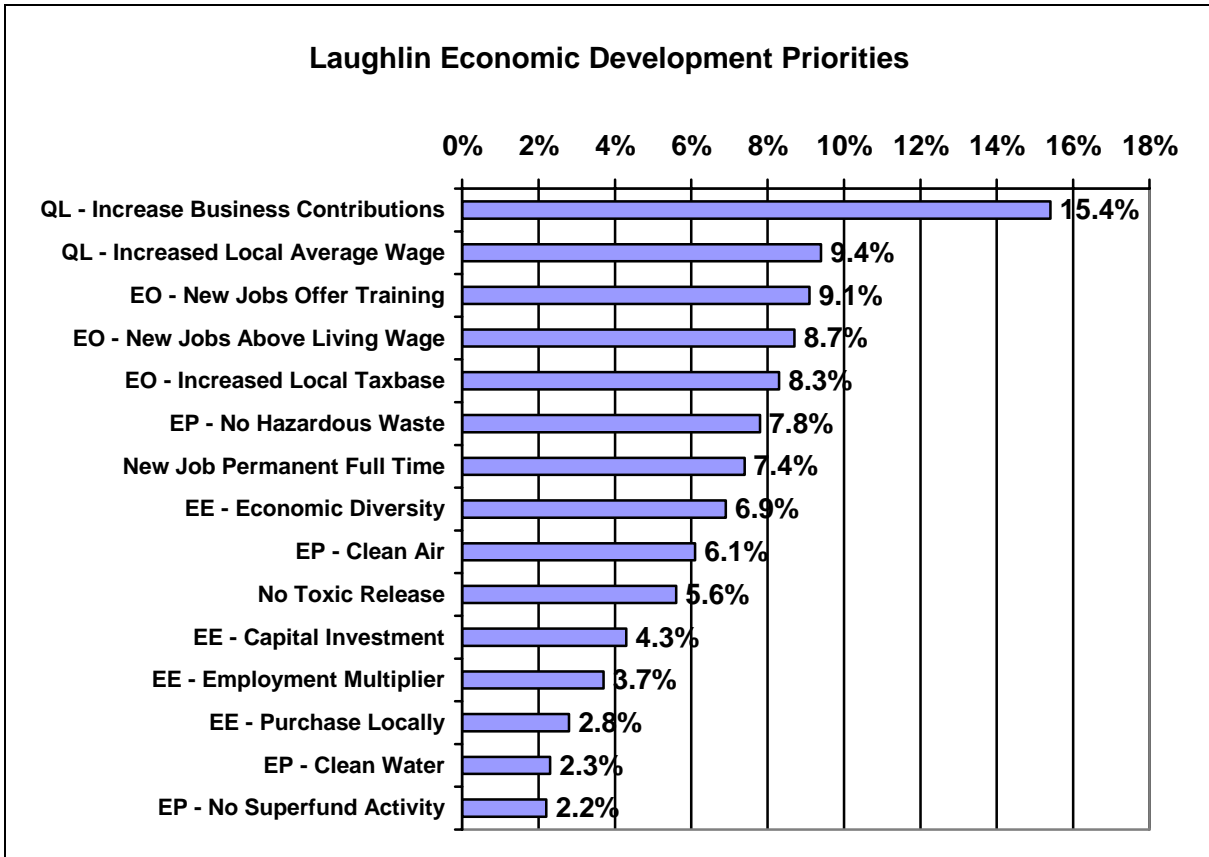
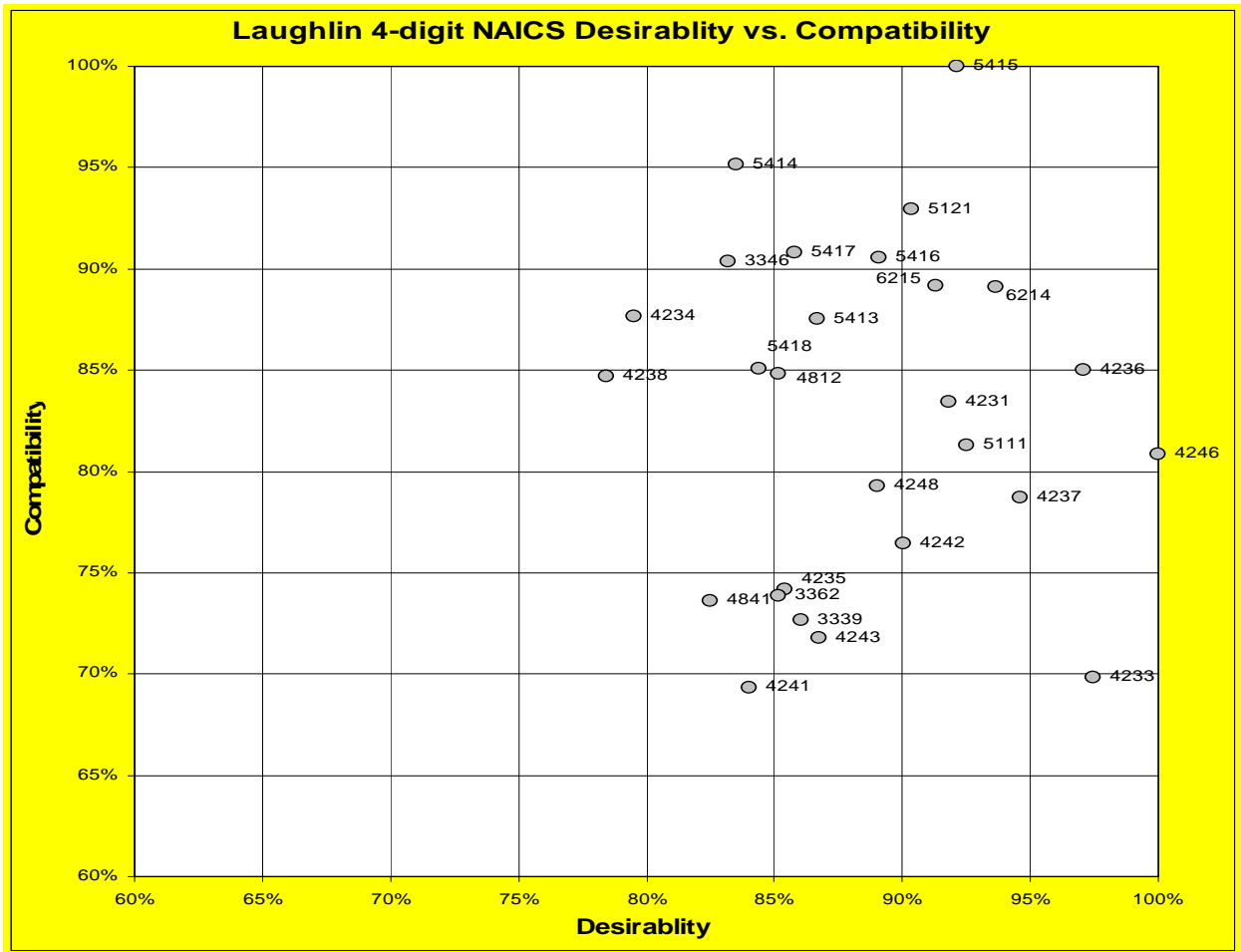


Figure 29 shows the best match industries, considering community desirability and industry compatibility, by 4-digit NAICS for Laughlin. The most desirable industry is 4246 (chemical and allied product merchant wholesalers) with a perfect match of 1.0. This means that this industry perfectly meets the regional goals for economic development. The most compatible NAICS sector is 5415 (computer system designs and related services) with a perfect match of 1.0. This means that Laughlin has sufficient assets that meet NAICS 5415 needs. Full desirability and compatibility index measures for each NAICS sector is presented in Appendix C.

Figure 29. Laughlin Economic Development Best Match Industries by 4-Digit NAICS.



NAICS sectors with strong desirability and compatibility index matches (.85 or greater) are presented in Table 29. These NAICS sectors are considered as having the strongest match and should be strongly considered in any targeted economic development recruitment strategy development in Laughlin. More detailed descriptions and information for the best matched NAICS sectors is presented in Appendix D.

Table 29. Laughlin “Best Match” NAICS Sector with Desirability and Compatibility Indexes 0.85 or greater.

<b>NAICS</b>	<b>Description</b>	<b>Desirability</b>	<b>Compatibility</b>
6214	Outpatient Care Center	0.936308	0.891092
5415	Computer Systems Design and Related Services	0.921679	1.000000
6215	Medical and Diagnostic Laboratories	0.912906	0.891556
5121	Motion Picture and Video Industries	0.903922	0.929574
5416	Management, Scientific, and Technical Consulting Service	0.890672	0.905774
5413	Architectural, Engineering, and Related Services	0.866843	0.875482
5417	Scientific Research and Development Services	0.857708	0.907956

Table 30 reports the NAICS sectors with desirability indices 0.85 or greater. The importance or value of the desirability index is that the stronger the index the better a NAICS sector meets Laughlin’s economic development goals. The 20 NAICS sectors presented in Table 31 shows that Laughlin’s economic development goals match industry goals, but the lack of developed assets in Laughlin results in weak compatibility indices. Several NAICS sectors have compatibility issues which require further in-depth analysis to better determine what those deficiencies are. Once identified, Laughlin could then enter into aggressive economic development planning that would include improving the community’s assets to better meet desirable NAICS sector needs. Finally, Laughlin should still consider all

NAICS sectors with a desirability index greater than 0.85 and develop short and long-term strategies to improve or strengthen the community's assets.

Table 30. Laughlin Desirability Index Rankings 0.85 or Greater.

NAICS	Description	Desirability Index	Compatibility Index
4246	Chemical and Allied Product Merchant Wholesalers	1.00000	0.808687
<b>4233</b>	<b>Lumber and Other Construction Materials Merchant Wholesalers</b>	<b>0.97436</b>	<b>0.698281</b>
4236	Electrical and Electronic Goods Merchant Wholesalers	0.97063	0.849917
<b>4237</b>	<b>Hardware, and Plumbing and Heating Equipment and Supplies Merchant Wholesalers</b>	<b>0.946029</b>	<b>0.787365</b>
6214	Outpatient Care Center	0.936308	0.891092
5111	Newspaper, Periodical, Book, and Directory Publishers	0.925408	0.812687
5415	Computer Systems Design and Related Services	0.921679	1.000000
4231	Motor Vehicle and Motor Vehicle Parts and Supplies Merchant Wholesaler	0.918163	0.834559
6215	Medical and Diagnostic Laboratories	0.912906	0.891556
5121	Motion Picture and Video Industries	0.903922	0.929574
<b>4242</b>	<b>Drugs and Druggists' Sundries Merchant Wholesalers</b>	<b>0.900485</b>	<b>0.764505</b>
5416	Management, Scientific, and Technical Consulting Service	0.890672	0.905774
<b>4248</b>	<b>Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers</b>	<b>0.890329</b>	<b>0.792866</b>
<b>4243</b>	<b>Apparel, Piece Goods, and Notions Merchant Wholesalers</b>	<b>0.867634</b>	<b>0.717653</b>
5413	Architectural, Engineering, and Related Services	0.866843	0.875482
<b>3339</b>	<b>Other General Purpose Machinery Manufacturing</b>	<b>0.860748</b>	<b>0.726439</b>
5417	Scientific Research and Development Services	0.857708	0.907956
<b>4235</b>	<b>Metal and Mineral (except petroleum) Merchant Wholesalers</b>	<b>0.854390</b>	<b>0.741820</b>
<b>3362</b>	<b>Motor Vehicle Body and Trailer Manufacturing</b>	<b>0.851691</b>	<b>0.738319</b>
4812	Nonscheduled Air Transportation	0.851691	0.847978

**Bullhead City and Surrounding Arizona Communities**

Figure 30 presents the regional economic development goals generated through community surveys administered to 50 residents in Bullhead City and surrounding Arizona Communities. Nearly 33% of respondents expressed employment opportunities as the top goal for Bullhead City and surrounding Arizona communities. Quality of life and economic efficiency were also important with 32.4% and 18.2%, respectively.

Figure 31 reports Bullhead City and surrounding Arizona communities' economic development priorities. The highest priority expressed by respondents was new job permanent full time at 11.5%. Other priorities receiving high responses include: increase local average wage (11.4%), new jobs above living wage (10.4%) and increase business contributions (10.0%)

Figure 30. Bullhead City and Surrounding Arizona Communities Economic Development Goals.

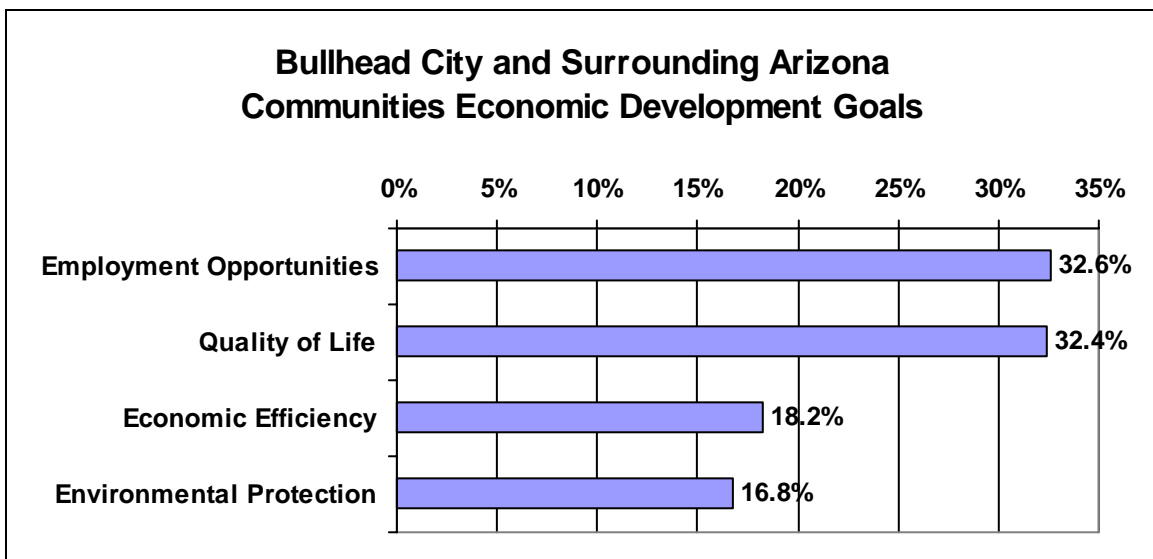


Figure 31. Bullhead City and Surrounding Arizona Communities Economic Development Priorities.

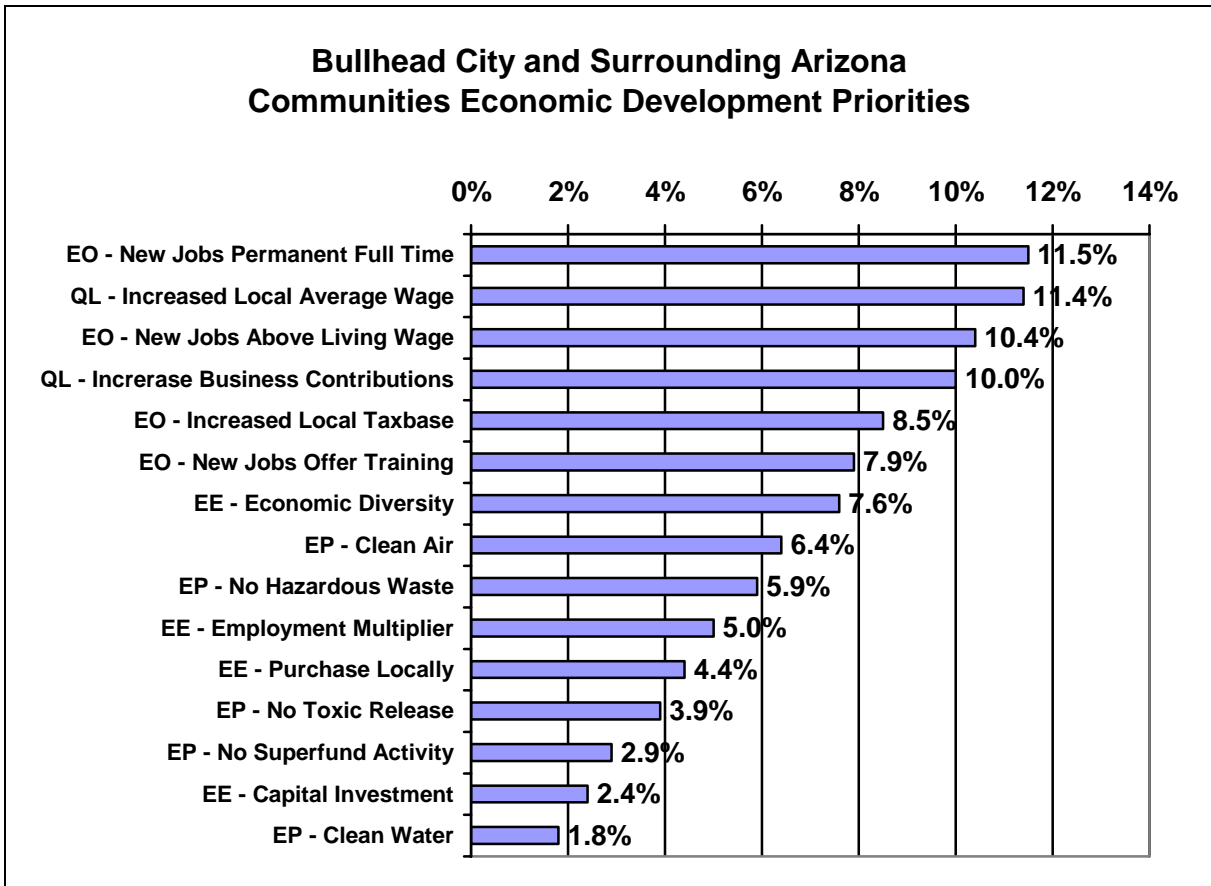
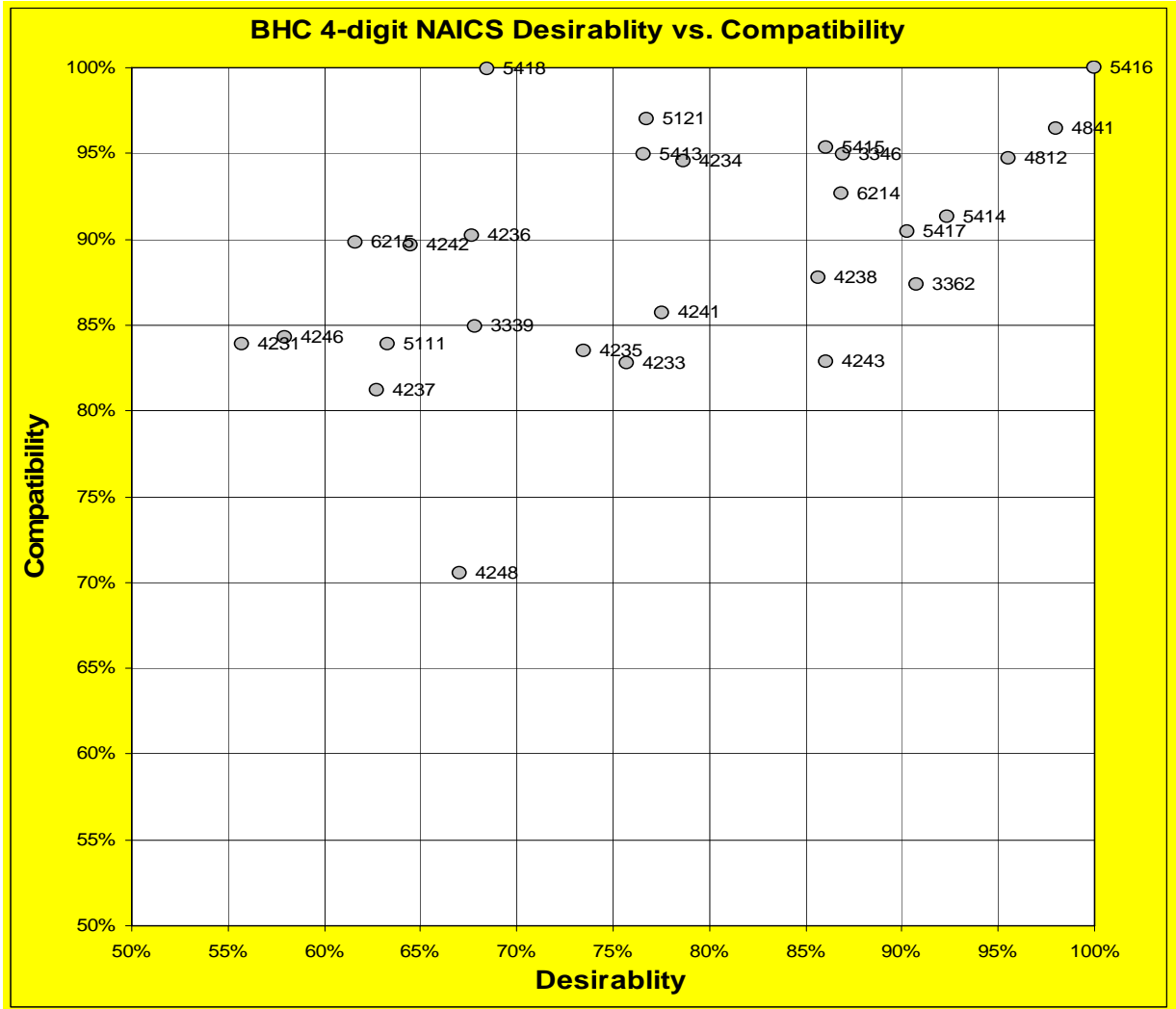


Figure 32 shows the best match industries, considering community desirability and industry compatibility, by 4-digit NAICS for Bullhead City and surrounding Arizona communities. NAICS sector 5416 (management, scientific and technical consulting service) reports a perfect desirability and compatibility index. This means that this NAICS sector meets local economic development goals and has required assets to meet needs. NAICS sector 5418 (advertising, public relations and related services) reports a perfect compatibility index of 1.0 meaning sufficient assets exist to meet needs. Full desirability and compatibility index measures for each NAICS sector is presented in Appendix C.



Figure 32. Bullhead City and Surrounding Arizona Communities “Best Match” Industries.



NAICS sectors with strong desirability and compatibility index matches (0.85 or greater) are presented in Table 31. These NAICS sectors are considered as having the strongest match and should be strongly considered in any targeted economic development recruitment strategy development in Laughlin.

The strength of the Bullhead City and surrounding Arizona communities is the strong compatibility indices ranging from 0.87 to 1.0. This means that current area assets meet

several NAICS sector needs, thus giving Bullhead City and surrounding Arizona communities several options when developing an economic strategy. More detailed descriptions and information for the best matched NAICS sectors is presented in Appendix D.

Table 31. Bullhead City and Surrounding Arizona Communities “Best Match” NAICS Sector with Desirability and Compatibility Indexes 0.85 or greater.

<b>NAICS</b>	<b>Description</b>	<b>Desirability</b>	<b>Compatibility</b>
5416	Management, Scientific, and Technical Consulting Service	1.000000	1.000000
4841	General Freight Trucking	0.980262	0.964554
4812	Nonscheduled Air Transportation	0.955622	0.947294
5414	Specialized Design Services	0.923694	0.913355
3362	Motor Vehicle Body and Trailer Manufacturing	0.907858	0.873910
5417	Scientific Research and Development Services	0.902760	0.904131
3346	Manufacturing and Reproducing Magnetic and Optical Media	0.869774	0.949529
6214	Outpatient Care Center	0.868522	0.926403
4243	Apparel, Piece Goods, and Notions Merchant Wholesalers	0.860971	0.828889
5415	Computer Systems Design and Related Services	0.860337	0.953168
4238	Machinery, Equipment, and Supplies Merchant Wholesalers	0.856617	0.877821

## CONCLUSIONS AND DISCUSSION

The purpose of this study is to provide technical assistance to the communities in the Colorado River region by identifying industries that can be targeted for short and long-range economic development planning. With the recent closure of the Mohave Generating Station, one of the largest employers in the region, targeted industry economic development planning is essential to help mitigate the loss of nearly 300 jobs and over \$20 million of household income. Using the Community Business Matching (CBM) model procedure, specific industries by North American Industrial Classification System (NAICS) were analyzed to identify NAICS sectors that best match the regions economic development goals and priorities (desirability) with businesses/industry needs (compatibility). For each NAICS sector in the CBM model, desirability and compatibility indexes were generated, reporting a value between 0.00 (worst) and 1.00 (best).

Following the CBM procedure, eight NAICS sectors were identified as having the best match for targeted economic development in the Colorado River region. Best match was defined as those NAICS sectors that reported at least a 0.85 index rating for both desirability (community goals and wants) and compatibility (business/industry needs). Best match NAICS sectors include:

- 5416 Management, Scientific and Technical Consulting Services
- 5414 Specialized Design Services
- 4812 Nonscheduled Air Transportation
- 5417 Scientific Research and Development Services
- 3346 Manufacturing and Reproducing Magnetic and Optical Media
- 5415 Computer Systems Design and Related Services
- 4238 Machinery, Equipment and Supplies Merchant Wholesalers
- 6214 Outpatient Care Service

NAICS 5416 (management, scientific and technical consulting service) reports the best overall match with a 1.0 desirability index and .959525 compatibility index rating. This means that businesses that operate in this sector perfectly meet the regional economic development goals and priorities and there are strong indications that the region has the necessary assets to meet the needs of businesses operating in this sector. The most compatible industries are 5414 (specialized design services) and 5415 (computer system designs and related services) with a perfect match of 1.0. This means that the Colorado River region assets meet both NAICS sector needs. Although the regional economic development priority is to create economic development strategies targeted at NAICS sectors with the highest desirability and compatibility index ratings, it is important that the region consider each of the best match NAICS sectors when developing overall regional economic development strategies. That is, a series of short and long-range economic development strategies should be developed for each of the eight best matched NAICS sectors.

NAICS sectors that need additional analysis and consideration are those that are reporting high desirability indexes (greater than 0.85) and low compatibility indexes (less than 0.85). This means that these NACIS sectors meet the economic development goals and priorities for the region, but current regional assets do not adequately meet the required needs of businesses operating in a specific NAICS sector. Regional or community asset development strategies should be considered to improve the overall NACIS sector match. Sectors that fall in this category for the region include: NAICS 4841 (general freight trucking), 3362 (motor vehicle body and trailer manufacturing) and 4243 (apparel, piece goods and notions merchant wholesalers).

Best match sectors were also estimated for individual communities, Laughlin and Bullhead City and surrounding Arizona communities. Overall, several of the NAICS sectors reported as the best match for the Colorado River region are also reported as the best match for the individual communities. Additional community NAICS sectors to be considered for targeted economic development strategies include: Laughlin, NAICS 6215 (medical and diagnostic laboratories), NAICS 5121 (motion picture and video industries) and NAICS 5413 (architectural, engineering and related services; Bullhead City and surrounding Arizona communities, NAICS 4841 (general freight trucking), NAICS 3362 (motor vehicle body trailer manufacturing) and NAICS 4243 (apparel, piece goods and notions merchant wholesalers). Although individual community economic development strategies may be preferred in some instances, it is recommended that a regional planning approach be perused using the assets in the region. Each community has its own strengths and assets to attract specific NAICS sectors, but a well coordinated regional plan will minimize duplication of competitive activities.

### ***Possible Next Steps***

Several additional economic development strategic planning steps for the Colorado River region and individual communities need to be further considered using the results from this analysis. Some activities to consider when developing a regional economic development and implementation strategy include:

1. Assure that a strong economic development strategic planning committee exists that will use information in this report as a starting point for any regional economic development strategic plan.

2. Further study or collect additional data for each NAICS sector identified as having the best match in the Colorado River region and individual communities.
3. Strategic planning committee(s) should consider developing regional and community marketing materials highlighting local assets. Understand what assets are important for each best match NAICS sector and highlight these assets in any marketing materials. Customize marketing materials, if needed.
4. Develop targeted business contact strategy for each NAICS best match sectors. This can be accomplished by purchasing direct mailing contact list from third-party vendors (i.e. Dunn & Bradstreet). These lists are usually very reasonably priced and can be custom sorted by different criteria (i.e. firm size, sales, location, etc.).
5. Assemble a strategic economic development sub-committee to further examine NAICS sector compatibility issues (i.e. infrastructure, etc.) and develop action strategies to improve regional and community assets.

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**APPENDIX A**

**COMMUNITY GOAL/PRIORITY SURVEY  
FOR ECONOMIC DEVELOPMENT**



## COMMUNITY GOAL/PRIORITY SURVEY FOR ECONOMIC DEVELOPMENT

This survey asks you to compare several specific goals and sub-goals of a local economy. Every item is compared in a pair wise manner, meaning, for each pair, you need to answer

1. which of these two things is most important to me, and
2. how much more important is the goal I circled than the other goal?

Keep in mind the relative importance of each goal-pair and how it ranks in your mind within the whole group.

**The example below shows you what we are expecting in the way of your participation.**

<b>Which is more important? (Circle one)</b>	Equal	Moderately more important	Strongly more important	Very strongly more important	Extremely more important				
<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 1px solid black; border-radius: 50%; padding: 5px; width: 150px;">                     every new job generates additional jobs in the community                 </div> <span style="font-size: 2em;">or</span> <div style="width: 150px;">                     the new business returns capital to the local economy                 </div> </div>	1	2	3	4	5	6	7	8	9

In the example above, the answers mean the survey-taker felt having more jobs created locally for each new job was 4 times more important than having the new business get its supplies locally.

You will compare five pages of choices. The first four pages compare economic sub-goals in the goal categories of “Economic Efficiency,” “Employment Opportunities,” “Environmental Protection,” and “Quality of Life.” The 5<sup>th</sup> page asks you to then rank the each goal category. A glossary of terms used in this survey can be found on the last page.

Thank you for your participation!

## Economic Efficiency

Economic Efficiency describes characteristics of doing business so that both businesses and workers buy locally. These characteristics return revenues locally; they contribute to the growth or stability of other local businesses. An efficient local economy does not import its goods and export the revenues generated by local jobs.

<b>Which is more important? (Circle one)</b>		Equal	Moderately more important		Strongly more important		Very strongly more important		Extremely more important		
every new job generates additional jobs in the community	or	the new business returns capital to the local economy	1	2	3	4	5	6	7	8	9
every new job generates additional jobs in the community	or	new businesses (industries) use the locally available natural and industrial resources	1	2	3	4	5	6	7	8	9
every new job generates additional jobs in the community	or	new businesses increase the local economic diversity	1	2	3	4	5	6	7	8	9
the new business returns capital to the local economy	or	new businesses (industries) use the locally available natural and industrial resources	1	2	3	4	5	6	7	8	9
the new business returns capital to the local economy	or	new businesses increase the local economic diversity	1	2	3	4	5	6	7	8	9
new businesses (industries) use the locally available natural and industrial resources	or	new businesses increase the local economic diversity	1	2	3	4	5	6	7	8	9

## Employment Opportunity

Employment Opportunity describes the quality of job. Are local jobs full-time? Are salaries high enough for workers to have a good quality of life? Do the jobs offer the worker the opportunity to improve themselves?

<b>Which is more important? (Circle one)</b>	Equal		Moderately more important		Strongly more important		Very strongly more important		Extremely more important	
the new jobs are at or above the livable wage or the new jobs are permanent full time	1	2	3	4	5	6	7	8	9	
the new jobs are at or above the livable wage or the new jobs offer benefits	1	2	3	4	5	6	7	8	9	
the new jobs are at or above the livable wage or the new jobs provide training programs to increase worker skills	1	2	3	4	5	6	7	8	9	
the new jobs are permanent full-time or the new jobs offer benefits	1	2	3	4	5	6	7	8	9	
the new jobs are permanent full-time or the new jobs provide training programs to increase worker skills	1	2	3	4	5	6	7	8	9	
The new jobs would have higher than average wages or the new jobs provide training programs to increase worker skills	1	2	3	4	5	6	7	8	9	

## Environmental Protection

Businesses contribute to environmental quality management of wastes and compliance with EPA standards. These behaviors directly affect quality of community life.

<b>Which is more important? (Circle one)</b>	Equal		Moderately more important		Strongly more important		Very strongly more important		Extremely more important	
new businesses make only EPA compliant discharges to water or new businesses report toxic releases	1	2	3	4	5	6	7	8	9	
new businesses make only EPA compliant discharges to water or new businesses are in compliance with hazardous waste management	1	2	3	4	5	6	7	8	9	
new businesses make only EPA compliant discharges to water or new businesses are not listed participants in active or archived superfund reports	1	2	3	4	5	6	7	8	9	
new businesses make only EPA compliant discharges to water or new businesses have not been reported for non-compliant air releases	1	2	3	4	5	6	7	8	9	
new businesses report toxic releases or new businesses are in compliance with hazardous waste management	1	2	3	4	5	6	7	8	9	
new businesses report toxic releases or new businesses are not listed participants in active or archived superfund reports	1	2	3	4	5	6	7	8	9	
new businesses report toxic releases or new businesses have not been reported for non-compliant air releases	1	2	3	4	5	6	7	8	9	
new businesses are in compliance with hazardous waste management or new businesses are not listed participants in active or archived superfund reports	1	2	3	4	5	6	7	8	9	
new businesses are in compliance with hazardous waste management or new businesses have not been reported for non-compliant air releases	1	2	3	4	5	6	7	8	9	
new businesses are not listed participants in active or archived superfund reports or new businesses have not been reported for non-compliant air releases	1	2	3	4	5	6	7	8	9	

## Quality of Life

Quality of Life describes the impact of available jobs on the well-being of the community.

<b>Which is more important? (Circle one)</b>	Equal	Moderately more important		Strongly more important		Very strongly more important		Extremely more important	
the new business effectively increases the local average wage      or      the new business increases the local tax base	1	2	3	4	5	6	7	8	9
the new business effectively increases the local average wage      or      the new business is committed to the community as a whole	1	2	3	4	5	6	7	8	9
the new business increases the local tax base      or      the new business is committed to the community as a whole	1	2	3	4	5	6	7	8	9

## Category Comparisons

Now that you have considered thoughtfully some components of each category of economic well-being, please compare the categories themselves. Keep in mind the relative importance of each goal-pair and how it ranks in your mind within the whole group.

<b>Which is more important? (Circle one)</b>	Equal	Moderately more important	Strongly more important	Very strongly more important	Extremely more important				
Economic Efficiency    or    Employment Opportunity	1	2	3	4	5	6	7	8	9
Economic Efficiency    or    Environmental Protection	1	2	3	4	5	6	7	8	9
Economic Efficiency    or    Quality of Life	1	2	3	4	5	6	7	8	9
Employment Opportunity    or    Environmental Protection	1	2	3	4	5	6	7	8	9
Employment Opportunity    or    Quality of Life	1	2	3	4	5	6	7	8	9
Environmental Protection    or    Quality of Life	1	2	3	4	5	6	7	8	9

## Survey Demographics

Thank you for answering the demographic information below. Your complete anonymity is important to us. No personal information about you will be used in any way under any circumstances. Preferences of gender and age groups can be useful, however. Your demographic information will only be used in analysis of group preferences.

My gender is:	<input type="checkbox"/>	Male
	<input type="checkbox"/>	Female

My age group is:	<input type="checkbox"/>	25 years or less
	<input type="checkbox"/>	26 to 35 years
	<input type="checkbox"/>	36 to 45 years
	<input type="checkbox"/>	46 to 55 years
	<input type="checkbox"/>	56 to 65 years
	<input type="checkbox"/>	65 to 75 years
	<input type="checkbox"/>	more than 75 years

## Definition of Frequently Used Terms

A *Community*, refers to a group of people in a common geographic location who have a common interest in the results of local economic development efforts.

A *Site*, is an area of land specified by the *community* where economic development activities are to occur. It can be a building, an industrial park, or a vast tract of agricultural land.

*Community goals*, are the outcomes that *communities* wish to obtain from economic development activities.

*Economic Efficiency* is a measure of how well resources are distributed in the community. In an efficient economy, increased success of one business will not cause other business to do worse.

*Employment Opportunities* are a measure of the kind and quality of local employment for local labor.

*Environmental Protection* measures the impacts of business operations on the local environment. This includes utility and energy use, disposal of industrial waste, what is involved in transporting goods and services to and from the business, as well as the direct impacts on land, air, and water quality.

*Quality of Life* measures the impact of jobs on employee lifestyle and how well local jobs contribute to the local tax base.

*Paired Comparison* rankings help individuals clarify and state what is important to them. It is almost always true that even though the comparison rankings of individuals may have moderate inconsistency, when put together as a community data set, the paired comparisons have high consistency, and defines what is most important as a whole for the direction of community development. The result of *Paired Comparisons* is an aggregate weighting scheme for assessing the degree of tradeoff among the goals.

*Community assets*, refer to the physical and social capital that a *community* has to offer local or incoming businesses, such as utilities, transportation, telecommunication facilities, local suppliers, local customers, tax rates, commercial loans, development assistance, life amenities, etc. These are the things regarded as necessary for doing business.

A *Business*, is defined as a for-profit firm or a non-profit organization that can make location decisions independently. CBM focuses on small- and medium-sized businesses with employment under one-hundred and fifty.

*Industry sectors*, are the groups that *businesses* are classified into. CBM mostly follows the 4-digit level North American Industrial Classification System (NAICS).

*Business benefits*, refer to the contributions businesses make to their host communities. Jobs, wages, training programs, tax revenues, charitable contributions, to name a few, are among the commonly known *business benefits*. Businesses with benefits that receive high priority in a community are more desirable to that community.

*Business needs*, are what businesses require from a community. Businesses were asked to rate the importance of their needs for various community assets on a four-point scale in a survey conducted as part of the study.



**APPENDIX B**  
**COMMUNITY ASSETS QUESTIONNAIRE**

## COMMUNITY ASSETS QUESTIONNAIRE

### DATA PROVIDED BY LOCAL EXPERT:

Please remember that unless these data are complete, the analysis cannot be run.

#### Economic Efficiency

Indicator	Baseline	Target	Comments
Employment Multiplier			
Local Purchases~			percentage of industrial sector purchases made locally
Economic Diversity*			
Capital Investment			percentage of sales retained locally as capital

~ improvement is a higher percentage of purchase

\* improvement is a lower Herfindahl-Hirshman Index

#### Employment Opportunity

Indicator	Baseline	Target	Comments
Local Jobs			percentage of workforce working locally
Full-Time Permanent Jobs			percentage of local workforce employed full-time
Average Wages			
Employee Training			percentage of sales spent on employee training

#### Environmental Protection

Indicator	Baseline	Target	Comments
Local Wastewater Remediation Costs			percentage of local annual revenue
Local Toxic Release Cleanup Costs			percentage of local annual revenue
Hazardous Waste Remediation Costs			percentage of local annual revenue
Superfund Redevelopment Costs			percentage of local annual revenue
EPA Air Quality Remediation Costs			percentage of local annual revenue

## Quality of Life

Indicator	Baseline	Target	Comments
Average Wage Jobs			percentage of total jobs at or above average wage
Living Wage Jobs			percentage of total jobs at or above the living wage
Employee Benefits			percentage of average wage
Local Tax Base			percentage of local revenue from taxes
Income Distribution*			Gini Coefficient
Proprietor Income			PI/average wage

\* larger values are an improvement

## Available Land and Building Space

Indicator	Available Now	Available in 1-2 years	Comments
Available Undeveloped Land			acres
Available Undeveloped Land with Infrastructure			acres
Available Undeveloped Land with Partial Infrastructure			acres
Available Undeveloped Land near Infrastructure			acres
Available WAREHOUSE space			sq.ft.
Available MANUFACTURING/ OPERATIONS space			sq.ft.
Available OFFICE space			sq.ft.
Available RETAIL space			sq.ft.

### Infrastructure and Business Development Resource Availability

Indicator: Is the following available in your community?	Yes/No
3-phase electric power	
natural gas pipeline	
internet/high speed telecommunications	
high-volume water supply	
high-volume wastewater supply	
high-volume solid waste disposal	
access to ponds and streams	
available commercial sites with room for future expansion	
mass transportation for workers	
community job training programs	
local development assistant	
state development assistance	
competitive commercial real estate SALES market	
competitive commercial real estate LEASING market	
community college	
quality health care	

### Business Costs, Resources, and Other Indices

Indicator:	Units/Information Source
local labor costs	dollars per worker per year (BLS)
local business tax rate	dollars per \$100 assessed value
average worker's compensation tax rate	
local commercial loan rate (best average)	
cost of living index	(Chamber of Commerce)
retail shopping expenditure	dollars per capita retail sales
local crime rate	crimes per 100,000 population

### Community Quality of Life: Self-evaluation

*Please rate the quality of the following indicators:*

1=lowest possible rating      10=highest possible rating

<b>Indicator:</b>	1	2	3	4	5	6	7	8	9	10
environmental quality										
outdoor recreation opportunity										
availability of social and cultural opportunities										
quality of local schools										
availability of quality health care										

## **APPENDIX C**

### **DESIRABILITY AND COMPATIBILITY INDEX RATINGS**

**COLORADO RIVER REGION DESIRABILITY AND COMPATIBILITY  
INDEX RATINGS**

Rank	NAICS	Description	Desirability	Compatibility
1	5416	Management, Scientific, and Technical Consulting Service	1.000000	0.959525
2	4841	General Freight Trucking	0.980414	0.773667
3	4812	Nonscheduled Air Transportation	0.956396	0.880457
4	5414	Specialized Design Services	0.927677	0.999801
5	3362	Motor Vehicle Body and Trailer Manufacturing	0.912956	0.780388
6	5417	Scientific Research and Development Services	0.904167	0.938999
7	3346	Manufacturing and Reproducing Magnetic and Optical Media	0.871339	0.971191
8	4243	Apparel, Piece Goods, and Notions Merchant Wholesalers	0.866205	0.728434
9	5415	Computer Systems Design and Related Services	0.860522	1.000000
10	4238	Machinery, Equipment, and Supplies Merchant Wholesalers	0.860000	0.917423
11	6214	Outpatient Care Center	0.859045	0.938767
12	4234	Commercial Equipment Merchant Wholesalers	0.785561	0.914660
13	4241	Paper and Paper Product Merchant Wholesalers	0.774777	0.731338
14	5121	Motion Picture and Video Industries	0.771617	0.981078
15	5413	Architectural, Engineering, and Related Services	0.766147	0.918257
16	4233	Lumber and Other Construction Materials Merchant Wholesalers	0.761054	0.739180
17	4235	Metal and Mineral (except petroleum) Merchant Wholesalers	0.734093	0.777053
18	5418	Advertising, Public Relations, and Related Services	0.682883	0.883405
19	3339	Other General Purpose Machinery Manufacturing	0.680624	0.774663
20	4236	Electrical and Electronic Goods Merchant Wholesalers	0.675272	0.906382
21	4248	Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers	0.668939	0.789914
22	4242	Drugs and Druggists' Sundries Merchant Wholesalers	0.639456	0.802390
23	5111	Newspaper, Periodical, Book, and Directory Publishers	0.632296	0.823254
24	4237	Hardware, and Plumbing and Heating Equipment and Supplies Merchant Wholesalers	0.625642	0.827206
25	6215	Medical and Diagnostic Laboratories	0.619053	0.948279
26	4246	Chemical and Allied Product Merchant Wholesalers	0.579488	0.852613
27	4231	Motor Vehicle and Motor Vehicle Parts and Supplies Merchant Wholesaler	0.559496	0.906312

**LAUGHLIN DESIRABILITY AND COMPATIBILITY INDEX RATINGS**

Rank	NAICS	Description	Desirability	Compatibility
1	4246	Chemical and Allied Product Merchant Wholesalers	1.00000	0.808687
2	4233	Lumber and Other Construction Materials Merchant Wholesalers	0.97436	0.698281
3	4236	Electrical and Electronic Goods Merchant Wholesalers	0.97063	0.849917
4	4237	Hardware, and Plumbing and Heating Equipment and Supplies Merchant Wholesalers	0.946029	0.787365
5	6214	Outpatient Care Center	0.936308	0.891092
6	5111	Newspaper, Periodical, Book, and Directory Publishers	0.925408	0.812687
7	5415	Computer Systems Design and Related Services	0.921679	1.000000
8	4231	Motor Vehicle and Motor Vehicle Parts and Supplies Merchant Wholesaler	0.918163	0.834559
9	6215	Medical and Diagnostic Laboratories	0.912906	0.891556
10	5121	Motion Picture and Video Industries	0.903922	0.929574
11	4242	Drugs and Druggists' Sundries Merchant Wholesalers	0.900485	0.764505
12	5416	Management, Scientific, and Technical Consulting Service	0.890672	0.905774
13	4248	Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers	0.890329	0.792866
14	4243	Apparel, Piece Goods, and Notions Merchant Wholesalers	0.867634	0.717653
15	5413	Architectural, Engineering, and Related Services	0.866843	0.875482
16	3339	Other General Purpose Machinery Manufacturing	0.860748	0.726439
17	5417	Scientific Research and Development Services	0.857708	0.907956
18	4235	Metal and Mineral (except petroleum) Merchant Wholesalers	0.854390	0.741820
19	3362	Motor Vehicle Body and Trailer Manufacturing	0.851691	0.738319
20	4812	Nonscheduled Air Transportation	0.851691	0.847978
21	5418	Advertising, Public Relations, and Related Services	0.843946	0.850497
22	4241	Paper and Paper Product Merchant Wholesalers	0.840525	0.693339
23	5414	Specialized Design Services	0.835382	0.951796
24	3346	Manufacturing and Reproducing Magnetic and Optical Media	0.832169	0.903343
25	4841	General Freight Trucking	0.824787	0.735819
26	4234	Commercial Equipment Merchant Wholesalers	0.795339	0.876697
27	4238	Machinery, Equipment, and Supplies Merchant Wholesalers	0.784529	0.847085

**BULLHEAD CITY AND SURROUNDING ARIZONA COMMUNITIES  
DESIRABILITY AND COMPATIBILITY INDEX RATINGS**

Rank	NAICS	Description	Desirability	Compatibility
1	5416	Management, Scientific, and Technical Consulting Service	1.000000	1.000000
2	4841	General Freight Trucking	0.980262	0.964554
3	4812	Nonscheduled Air Transportation	0.955622	0.947294
4	5414	Specialized Design Services	0.923694	0.913355
5	3362	Motor Vehicle Body and Trailer Manufacturing	0.907858	0.873910
6	5417	Scientific Research and Development Services	0.902760	0.904131
7	3346	Manufacturing and Reproducing Magnetic and Optical Media	0.869774	0.949529
8	6214	Outpatient Care Center	0.868522	0.926403
9	4243	Apparel, Piece Goods, and Notions Merchant Wholesalers	0.860971	0.828889
10	5415	Computer Systems Design and Related Services	0.860337	0.953168
11	4238	Machinery, Equipment, and Supplies Merchant Wholesalers	0.856617	0.877821
12	4234	Commercial Equipment Merchant Wholesalers	0.786226	0.945879
13	4241	Paper and Paper Product Merchant Wholesalers	0.775873	0.856956
14	5121	Motion Picture and Video Industries	0.767770	0.970212
15	5413	Architectural, Engineering, and Related Services	0.766158	0.949188
16	4233	Lumber and Other Construction Materials Merchant Wholesalers	0.757255	0.827921
17	4235	Metal and Mineral (except petroleum) Merchant Wholesalers	0.735266	0.835218
18	5418	Advertising, Public Relations, and Related Services	0.684785	0.999426
19	3339	Other General Purpose Machinery Manufacturing	0.678479	0.849125
20	4236	Electrical and Electronic Goods Merchant Wholesalers	0.676602	0.901688
21	4248	Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers	0.670321	0.705189
22	4242	Drugs and Druggists' Sundries Merchant Wholesalers	0.644580	0.896776
23	5111	Newspaper, Periodical, Book, and Directory Publishers	0.632681	0.839192
24	4237	Hardware, and Plumbing and Heating Equipment and Supplies Merchant Wholesalers	0.627730	0.811958
25	6215	Medical and Diagnostic Laboratories	0.616041	0.898360
26	4246	Chemical and Allied Product Merchant Wholesalers	0.579986	0.842938
27	4231	Motor Vehicle and Motor Vehicle Parts and Supplies Merchant Wholesaler	0.557699	0.838934



## APPENDIX D

### BEST MATCH SECTOR DESCRIPTIONS

The following section provides descriptive information for only the best match NAICS sectors that were identified in the Colorado River Region using the CBM procedure. Individual community best match sectors are also included. For each NAICS sector the following information is presented: 1) sector description; 2) sector top ten producing states and western states performance using the most current economic census industry reports for 1997 or 2002, whichever is the most current; and 3) actual businesses sector responses that factor into relocation or expansion decisions (primary data). This information can further assist in identifying which sectors best fit the regional economy and be part of any economic development and implementation strategy plans.

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## NAICS CODE 3346

### **3346 Manufacturing and Reproducing Magnetic and Optical Media**

**3346 Description:** This industry group comprises establishments primarily engaged in one or more of the following manufacturing activities:

1. optical and magnetic media, such as blank audio tape, blank video tape, and blank diskettes and/or
2. mass duplicating (i.e., making copies) audio, video, software, and other data on magnetic, optical, and similar media

#### **Economic Census Trends, 2002**

NAICS 3346 (Covered Employment Only)	2002
Number of Establishments	953
Receipts/Revenues (\$1,000)	\$7,549,721
Annual Payroll (\$1,000)	\$1,367,077
Employees	37,904
Average Payroll Per Job	\$36,067
Average Employment Per Establishment	39.77
Average Receipts/Revenue Per Establishment	\$7,922,057

Source: US Census Bureau

### Top 10 States (NAICS 3346), 2002

	Establishments	Revenues (\$000)	Annual Payroll (\$1,000)	Paid Employees
<b>Total U.S.</b>	<b>953</b>	<b>\$7,549,721</b>	<b>\$1,367,077</b>	<b>37,904</b>
California	247	\$1,947,076	\$347,012	9,230
Alabama	9	\$667,545	\$104,641	3,126
Pennsylvania	40	\$567,750	\$83,313	2,079
Indiana	15	\$488,637	\$75,432	1,939
Illinois	43	\$321,763	\$83,773	2,458
New York	89	\$317,895	\$79,818	2,056
Virginia	21	\$312,880	\$38,755	1,039
Texas	50	\$307,672	\$50,670	1,429
North Carolina	18	\$283,408	\$74,522	2,091
Massachusetts	29	\$258,645	\$51,248	1,357
<b>Total</b>	<b>561</b>	<b>\$5,473,271</b>	<b>\$989,184</b>	<b>26,804</b>
<b>% of U.S.</b>	<b>58.87%</b>	<b>72.50%</b>	<b>72.36%</b>	<b>70.72%</b>

### Western States (NAICS 3346), 2002

	Establishments	Revenues (\$000)	Annual Payroll (\$1,000)	Paid Employees
<b>Total U.S.</b>	<b>953</b>	<b>\$7,549,721</b>	<b>\$1,367,077</b>	<b>37,904</b>
California	247	\$1,947,076	\$347,012	9,230
Arizona	15	\$223,624	\$17,488	452
Oregon	12	\$62,369	\$17,947	521
Colorado	25	\$58,475	\$13,408	371
Washington	24	\$39,010	\$12,265	352
Utah	13	D	D	250-499
Nevada	ND	ND	ND	ND
New Mexico	ND	ND	ND	ND
Montana	ND	ND	ND	ND
Wyoming	ND	ND	ND	ND
Alaska	ND	ND	ND	ND
Hawaii	ND	ND	ND	ND
Idaho	ND	ND	ND	ND
<b>Total Region</b>	<b>336*</b>	<b>\$2,330,554*</b>	<b>\$408,120*</b>	<b>10,926*</b>
<b>% of U.S.</b>	<b>35.26%</b>	<b>30.87%</b>	<b>29.85%</b>	<b>28.83%</b>

D = Disclosed Data

ND = No Data

\* Does not include all data

### Relocation/Expansion Decision Factors – Physical Infrastructure

NAICS 3346 (n=48)	Not Important	Somewhat Important	Important	Very Important
Access within 30 minutes to an interstate hwy	29.17%	18.75%	12.50%	39.58%
Access to Package Freight Services	18.75%	20.83%	18.75%	41.67%
Immediate access to railhead or rail spur	93.75%	0.00%	4.17%	2.08%
Access within 30 minutes to rail freight	95.83%	2.08%	0.00%	2.08%
Access to passenger air service & direct flights	25.00%	20.83%	33.33%	20.83%
Access to port or harbor facilities	91.67%	6.25%	2.08%	0.00%
Access to supplies (one day)	10.42%	8.33%	37.50%	43.75%
Access to customers (one day)	14.58%	4.17%	27.08%	54.17%
Access to 3-phase electric power	35.41%	14.58%	14.58%	35.42%
Access to natural gas pipeline	68.75%	8.33%	14.58%	8.33%
Access to an international trade port	93.75%	2.08%	4.17%	0.00%
Access to fiber optic lines	25.00%	16.67%	16.67%	41.67%
Availability of high volume water supply	85.42%	10.42%	2.08%	2.08%
Availability of high volume wastewater disposal	91.67%	4.17%	2.08%	2.08%
Availability of solid waste disposal	83.33%	6.25%	10.42%	0.00%
Availability of satellite transmission	44.68%	12.77%	12.77%	29.79%
Availability of high speed internet access	2.08%	0.00%	12.50%	85.42%
Availability of public transportation	52.08%	22.92%	10.42%	14.58%
Access to ponds and streams	93.75%	2.08%	2.08%	2.08%
Possibility for future expansion at site	29.16%	27.08%	27.08%	16.67%

### Relocation/Expansion Decision Factors – Economic Infrastructure

NAICS 3346 (n=48)	Not Important	Somewhat Important	Important	Very Important
Availability of managerial workforce	31.25%	18.75%	27.08%	22.92%
Availability of a skilled workforce	14.58%	10.42%	41.67%	33.33%
Availability of technical workforce	14.58%	16.67%	37.50%	31.25%
Availability of unskilled workforce	64.58%	16.67%	12.50%	6.25%
Favorable local labor costs	22.91%	16.67%	33.33%	27.08%
Favorable workers compensation tax rate	18.75%	16.67%	35.42%	29.17%
Favorable local tax rate	8.33%	25.00%	33.33%	33.33%
Availability of job training programs	37.50%	33.33%	25.00%	4.17%
Availability of long and short term financing	35.42%	20.83%	25.00%	18.75%

### Relocation/Expansion Decision Factors – Quality of Life

NAICS 3346 (n=48)	Not Important	Somewhat Important	Important	Very Important
Low Crime Rate	6.25%	10.42%	37.50%	45.83%
Availability and affordability of housing	10.42%	20.83%	39.58%	29.17%
High environmental quality	8.33%	12.50%	43.75%	35.42%
Outdoor recreation opportunities	25.00%	31.25%	29.17%	14.58%
Social and cultural opportunities	12.50%	20.83%	35.42%	31.25%
Retail shopping opportunities	20.83%	29.17%	31.25%	18.75%
Quality of education system	14.58%	10.42%	33.33%	41.67%
Availability of local college or university	20.83%	18.75%	35.42%	25.00%
Availability of quality health care	8.33%	10.42%	37.50%	43.75%
Availability of fire protection	4.16%	16.67%	39.58%	39.58%
Ease of attracting skilled workers	20.83%	6.25%	33.33%	39.58%

### Relocation/Expansion Decision Factors – Sources Used to Find Locations

NAICS 3346 (n=16)	Don't Use	Use a Little	Use	Use a Lot
Radio and television	50.00%	18.75%	0.00%	31.25%
Local newspaper	12.50%	50.00%	6.25%	31.25%
National newspaper	50.00%	18.75%	6.25%	25.00%
Regional trade publications	25.00%	25.00%	31.25%	18.75%
National trade publications	43.75%	18.75%	31.25%	6.25%
Local chamber of commerce	56.25%	25.00%	18.75%	0.00%
State chamber of commerce	81.25%	12.50%	6.25%	0.00%
Local economic development agencies	62.50%	18.75%	18.75%	0.00%
State economic development agencies	81.25%	12.50%	6.25%	0.00%
Real estate agent	25.00%	12.50%	50.00%	12.50%
Internet	6.25%	0.00%	31.25%	62.50%
Word of mouth	6.25%	6.25%	43.75%	43.75%
Vacation travel experience	56.25%	25.00%	12.50%	6.25%

## Miscellaneous Industry Information

NAICS 3346 (n=48)	Not Provided	Provided
Non managerial health insurance	33.34%	66.67%
Non managerial paid vacation	35.42%	64.58%
Non managerial job related training programs	41.66%	58.33%
Non managerial retirement plan with employer contributions	56.25%	43.75%
	Yes	No
Company relocated or expanded in the last 5 years	62.50%	37.50%

If a company (NAICS 3346) would relocate or expand to an additional location in the next 5 years, what is the best estimate of approximately how many total acres of property you would need? (n=48)

Less than 1 acre	47.92%
1 to 3 acres	18.75%
4 to 5 acres	10.42%
Over 5 acres	22.92%

If a company (NAICS 3346) would relocate or expand to an additional location in the next 5 years, what is the best estimate of the total amount of building space in square feet you would need? (Include exterior infrastructure areas like parking, loading docks and/or equipment storage) (n=16)

Less than 10,000 sq. ft.	50.00%
10,000 to 25,000 sq. ft.	31.25%
25,001 to 50,000 sq. ft.	6.25%
50,001 to 75,000 sq. ft.	6.25%
75,001 to 100,000 sq. ft.	6.25%
Over 100,000 sq. ft.	0.00%

If a company (NAICS 3346) would relocate or expand to an additional location in the next 5 years, what is the best estimate of annual sales or revenue at this location? (n=16)

Under \$1 million per year	56.25%
\$1 million to \$2 million per year	12.50%
Over \$2 million to \$3 million per year	6.25%
Over \$3 million to \$5 million per year	6.25%
Over \$5 million to \$10 million per year	0.00%
Over \$10 million per year	6.25%
Don't know	12.50%

## NAICS CODE 3362

### 3362 Motor Vehicle and Trailer Manufacturing

**3362 Description:** This industry comprises establishments primarily engaged in (1) manufacturing motor vehicle bodies and cabs or (2) manufacturing truck, automobile and utility trailers, truck trailer chassis, detachable trailer bodies and detachable trailer chassis. The products made may be sold separately or may be assembled on purchased chassis and sold as complete vehicles.

Motor homes are units where the motor and the living quarters are contained in the same integrated unit, while travel trailers are designed to be towed by a motor unit, such as an automobile or a light truck.

#### Economic Census Trends, 1997

NAICS 3362 (Covered Employment Only)	1997
Number of Establishments	2,103
Receipts/Revenues (\$1,000)	\$23,007,668
Annual Payroll (\$1,000)	\$3,386,084
Employees	125,015
Average Payroll Per Job	\$27,085
Average Employment Per Establishment	59.5
Average Receipts/Revenue Per Establishment	\$10,940,403

Source: US Census Bureau

**Top 10 States (NAICS 3362), 1997**

	Establishments	Revenues (\$000)	Annual Payroll (\$1,000)	Paid Employees
<b>Total U.S.</b>	<b>2,103</b>	<b>\$23,007,668</b>	<b>\$3,386,084</b>	<b>125,015</b>
Indiana	176	\$5,232,319	\$757,760	24,900
California	211	\$3,735,983	\$266,993	10,200
Pennsylvania	114	\$1,166,170	\$205,818	7,725
Iowa	62	\$1,107,697	\$190,988	7,657
Texas	164	\$918,165	\$160,749	6,265
Wisconsin	59	\$844,918	\$149,596	5,031
Ohio	72	\$781,160	\$149,688	5,256
Illinois	46	\$735,324	\$117,184	4,248
North Carolina	69	\$715,946	\$124,283	4,197
Florida	98	\$673,537	\$123,611	4,914
<b>Total</b>	<b>1,071</b>	<b>\$15,911,219</b>	<b>\$2,246,670</b>	<b>80,393</b>
<b>% of U.S.</b>	<b>50.93%</b>	<b>69.16%</b>	<b>66.35%</b>	<b>64.31%</b>

**Western States (NAICS 3362), 1997**

	Establishments	Revenues (\$000)	Annual Payroll (\$1,000)	Paid Employees
<b>Total U.S.</b>	<b>2,103</b>	<b>\$23,007,668</b>	<b>\$3,386,084</b>	<b>125,015</b>
California	211	\$3,735,983	\$266,993	10,200
Oregon	59	\$620,333	\$98,085	4,157
Utah	20	\$180,289	\$28,695	1,088
Idaho	26	\$124,880	\$25,624	1,157
Arizona	36	\$76,258	\$13,601	588
New Mexico	11	\$30,705	\$4,468	165
Montana	9	\$26,991	\$7,697	251
Washington	40	D	D	1,000-2,499
Colorado	23	D	D	500-999
Wyoming	4	D	D	100-249
Alaska	ND	ND	ND	ND
Nevada	ND	ND	ND	ND
Hawaii	ND	ND	ND	ND
<b>Total Region</b>	<b>439</b>	<b>\$4,795,439</b>	<b>\$445,163</b>	<b>17,606*</b>
<b>% of U.S.</b>	<b>20.87%</b>	<b>20.84%</b>	<b>13.15%</b>	<b>14.08%*</b>

D = Disclosed Data

ND = No Data

\* Does not include all data



**Relocation/Expansion Decision Factors – Physical Infrastructure (Primary Data)**

NAICS 3362 (n=48)	Not Important	Somewhat Important	Important	Very Important
Access within 30 minutes to an interstate hwy	18.75%	12.50%	31.25%	37.50%
Access to Package Freight Services	33.33%	10.42%	25.00%	31.25%
Immediate access to railhead or rail spur	93.75%	4.17%	0.00%	2.08%
Access within 30 minutes to rail freight	95.83%	2.08%	0.00%	2.08%
Access to passenger air service & direct flights	60.42%	22.92%	10.42%	6.25%
Access to port or harbor facilities	91.67%	4.17%	4.17%	0.00%
Access to supplies (one day)	10.42%	22.92%	41.67%	25.00%
Access to customers (one day)	22.92%	16.67%	27.08%	33.33%
Access to 3-phase electric power	20.83%	4.17%	31.25%	43.75%
Access to natural gas pipeline	45.83%	6.25%	33.33%	14.58%
Access to an international trade port	89.58%	4.17%	4.17%	2.08%
Access to fiber optic lines	45.83%	12.50%	25.00%	16.67%
Availability of high volume water supply	70.83%	14.58%	10.42%	4.17%
Availability of high volume wastewater disposal	85.42%	8.33%	4.17%	2.08%
Availability of solid waste disposal	64.58%	6.25%	20.83%	8.33%
Availability of satellite transmission	72.92%	10.42%	12.50%	4.17%
Availability of high speed internet access	16.67%	16.67%	22.92%	43.75%
Availability of public transportation	75.00%	6.25%	14.58%	4.17%
Access to ponds and streams	87.50%	6.25%	4.17%	2.08%
Possibility for future expansion at site	18.75%	16.67%	41.67%	22.92%

**Relocation/Expansion Decision Factors – Economic Infrastructure (Primary Data)**

NAICS 3362 (n=48)	Not Important	Somewhat Important	Important	Very Important
Availability of managerial workforce	29.17%	14.58%	39.58%	16.67%
Availability of a skilled workforce	10.42%	14.58%	41.67%	33.33%
Availability of technical workforce	33.33%	25.00%	31.25%	10.42%
Availability of unskilled workforce	31.25%	31.25%	22.92%	14.58%
Favorable local labor costs	4.17%	10.42%	52.08%	33.33%
Favorable workers compensation tax rate	6.25%	8.33%	35.42%	50.00%
Favorable local tax rate	6.25%	10.42%	43.75%	39.58%
Availability of job training programs	47.92%	16.67%	27.08%	8.33%
Availability of long and short term financing	36.17%	19.15%	19.15%	25.53%

### Relocation/Expansion Decision Factors – Quality of Life (Primary Data)

NAICS 3362 (n=48)	Not Important	Somewhat Important	Important	Very Important
Low Crime Rate	4.17%	8.33%	52.08%	35.42%
Availability and affordability of housing	20.83%	16.67%	39.58%	22.92%
High environmental quality	16.67%	29.17%	33.33%	20.83%
Outdoor recreation opportunities	27.08%	20.83%	33.33%	18.75%
Social and cultural opportunities	39.58%	29.17%	22.92%	8.33%
Retail shopping opportunities	27.08%	22.92%	39.58%	10.42%
Quality of education system	18.75%	14.58%	43.75%	22.92%
Availability of local college or university	35.42%	18.75%	29.17%	16.67%
Availability of quality health care	6.25%	12.50%	52.08%	29.17%
Availability of fire protection	4.17%	6.25%	60.42%	29.17%
Ease of attracting skilled workers	14.58%	10.42%	43.75%	31.25%

### Relocation/Expansion Decision Factors – Sources Used to Find Locations (Primary Data)

NAICS 3362 (n=14)	Don't Use	Use a Little	Use	Use a Lot
Radio and television	78.57%	21.43%	0.00%	0.00%
Local newspaper	42.86%	28.57%	28.57%	0.00%
National newspaper	92.86%	7.14%	0.00%	0.00%
Regional trade publications	57.14%	21.43%	21.43%	0.00%
National trade publications	78.57%	14.29%	0.00%	7.14%
Local chamber of commerce	50.00%	21.43%	21.43%	7.14%
State chamber of commerce	92.86%	0.00%	7.14%	0.00%
Local economic development agencies	64.28%	14.29%	7.14%	14.29%
State economic development agencies	78.57%	0.00%	7.14%	14.29%
Real estate agent	28.57%	21.43%	28.57%	21.43%
Internet	28.57%	14.29%	28.57%	28.57%
Word of mouth	7.14%	21.43%	21.43%	50.00%
Vacation travel experience	57.14%	28.57%	7.14%	7.14%

## Miscellaneous Industry Information

NAICS 3362 (n=48)	Not Provided	Provided
Non managerial health insurance	27.08%	72.92%
Non managerial paid vacation	14.58%	85.42%
Non managerial job related training programs	43.75%	56.25%
Non managerial retirement plan with employer contributions	58.33%	41.67%
	Yes	No
Company relocated or expanded in the last 5 years	56.25%	43.75%

If a company (NAICS 3362) would relocate or expand to an additional location in the next 5 years, what is the best estimate of approximately how many total acres of property you would need? (n=48)

Less than 1 acre	7.14%
1 to 3 acres	28.57%
4 to 5 acres	14.29%
Over 5 acres	50.00%

If a company (NAICS 3362) would relocate or expand to an additional location in the next 5 years, what is the best estimate of the total amount of building space in square feet you would need? (Include exterior infrastructure areas like parking, loading docks and/or equipment storage) (n=14)

Less than 10,000 sq. ft.	0.00%
10,000 to 25,000 sq. ft.	35.71%
25,001 to 50,000 sq. ft.	21.43%
50,001 to 75,000 sq. ft.	7.14%
75,001 to 100,000 sq. ft.	7.14%
Over 100,000 sq. ft.	28.57%

If a company (NAICS 3362) would relocate or expand to an additional location in the next 5 years, what is the best estimate of annual sales or revenue at this location? (n=14)

Under \$1 million per year	0.00%
\$1 million to \$2 million per year	35.71%
Over \$2 million to \$3 million per year	0.00%
Over \$3 million to \$5 million per year	7.14%
Over \$5 million to \$10 million per year	14.29%
Over \$10 million per year	42.86%
Don't know	0.00%

## NAICS CODE 4238

### **4238 Machinery, Equipment & Supplies Merchant Wholesalers**

#### **42381 Construction and Mining (except Oil Well) Machinery and Equipment Merchant Wholesalers**

#### **42382 Farm & Garden Machinery & Equipment Merchant Wholesalers**

#### **42383 Industrial Machinery & Equipment Merchant Wholesalers**

#### **42384 Industrial Supplies Merchant Wholesalers**

#### **42385 Service Establish Equipment & Supply Merchant Wholesalers**

#### **42386 Transportation Equipment & Supplies (except motor vehicle) Merchant Wholesaler.**

**4238 Description:** This industry group comprises establishments primarily engaged in the merchant wholesale distribution of construction, mining, farm, garden, industrial, service establishment, and transportation machinery, equipment and supplies.

**42381 Description:** This industry comprises establishments primarily engaged in the merchant wholesale distribution of specialized machinery, equipment, and related parts generally used in construction, mining (except oil well) and logging activities.

**42382 Description:** This industry comprises establishments primarily engaged in the merchant wholesale distribution of specialized machinery, equipment, and related parts generally used in agricultural, farm, and lawn and garden activities.

**42383 Description:** This industry comprises establishments primarily engaged in the merchant wholesale distribution of specialized machinery, equipment, and related parts generally used in manufacturing, oil well, and warehousing activities.

**42384 Description:** This industry comprises establishments primarily engaged in the merchant wholesale distribution of supplies for machinery and equipment generally used in manufacturing, oil well, and warehousing activities.

**42385 Description:** This industry comprises establishments primarily engaged in the merchant wholesale distribution of specialized equipment and supplies of the type used by service establishments (except specialized equipment and supplies used in offices, stores, hotels, restaurants, schools, health and medical facilities, photographic facilities, and specialized equipment used in transportation and construction activities).

**42386 Description:** This industry comprises establishments primarily engaged in the merchant wholesale distribution of transportation equipment and supplies (except marine pleasure craft and motor vehicles).

## Economic Census Trends – Employer Only, 2002

<b>NAICS 4238</b>	<b>2002</b>
Number of Establishments	64,811
Receipts/Revenues (\$1,000)	\$297,936,999
Annual Payroll (\$1,000)	\$30,113,741
Employees	704,774
Average Payroll Per Job	\$42,728
Average Employment Per Establishment	10.87
Average Receipts/Revenue Per Establishment	\$4,597,012

<b>NAICS 42381</b>	<b>2002</b>
Number of Establishments	5,035
Receipts/Revenues (\$1,000)	\$47,574,705
Annual Payroll (\$1,000)	\$3,993,859
Employees	88,670
Average Payroll Per Job	\$45,042
Average Employment Per Establishment	17.61
Average Receipts/Revenue Per Establishment	\$9,448,799

<b>NAICS 42382</b>	<b>2002</b>
Number of Establishments	8,710
Receipts/Revenues (\$1,000)	\$40,314,213
Annual Payroll (\$1,000)	\$3,152,320
Employees	95,951
Average Payroll Per Job	\$32,853
Average Employment Per Establishment	11.02
Average Receipts/Revenue Per Establishment	\$4,628,497

<b>NAICS 42383</b>	<b>2002</b>
Number of Establishments	31,272
Receipts/Revenues (\$1,000)	\$113,607,776
Annual Payroll (\$1,000)	\$14,694,415
Employees	319,091
Average Payroll Per Job	\$46,050
Average Employment Per Establishment	10.20
Average Receipts/Revenue Per Establishment	\$3,632,890

<b>NAICS 42384</b>	<b>2002</b>
Number of Establishments	11,063
Receipts/Revenues (\$1,000)	\$51,382,359
Annual Payroll (\$1,000)	\$4,467,115
Employees	107,632
Average Payroll Per Job	\$41,503
Average Employment Per Establishment	9.73
Average Receipts/Revenue Per Establishment	\$4,644,523

<b>NAICS 42385</b>	<b>2002</b>
Number of Establishments	5,660
Receipts/Revenues (\$1,000)	\$16,772,588
Annual Payroll (\$1,000)	\$1,992,708
Employees	55,503
Average Payroll Per Job	\$35,902
Average Employment Per Establishment	9.81
Average Receipts/Revenue Per Establishment	\$2,963,354

<b>NAICS 42386</b>	<b>2002</b>
Number of Establishments	3,071
Receipts/Revenues (\$1,000)	\$28,285,358
Annual Payroll (\$1,000)	\$1,813,324
Employees	37,927
Average Payroll Per Job	\$47,810
Average Employment Per Establishment	12.35
Average Receipts/Revenue Per Establishment	\$9,210,471

Source: US Census Bureau

**Top 10 States (NAICS 4238) – Employer Only, 2002**

	Establishments	Revenues (\$000)	Annual Payroll (\$1,000)	Paid Employees
<b>Total U.S.</b>	<b>64,811</b>	<b>\$297,936,999</b>	<b>\$30,113,741</b>	<b>704,774</b>
Texas	6,104	\$29,791,253	\$2,800,855	65,136
California	6,250	\$28,215,359	\$2,835,265	65,488
Illinois	3,433	\$23,691,410	\$2,108,490	44,489
Ohio	3,039	\$14,058,459	\$1,450,134	34,643
Georgia	2,070	\$13,974,687	\$1,171,161	25,675
Pennsylvania	2,647	\$13,124,434	\$1,301,493	29,491
Michigan	2,459	\$12,888,005	\$1,313,954	28,730
North Carolina	1,943	\$10,733,013	\$1,048,503	23,953
New Jersey	1,933	\$10,678,958	\$1,052,263	21,193
New York	2,761	\$10,141,290	\$1,190,180	26,570
<b>Total</b>	<b>32,639</b>	<b>\$167,296,868</b>	<b>\$16,272,298</b>	<b>365,368</b>
<b>% of U.S.</b>	<b>50.36%</b>	<b>56.15%</b>	<b>54.04%</b>	<b>51.84%</b>

**Western States (NAICS 4238)**

	Establishments	Revenues (\$000)	Annual Payroll (\$1,000)	Paid Employees
<b>Total U.S.</b>	<b>64,811</b>	<b>\$297,936,999</b>	<b>\$30,113,741</b>	<b>704,774</b>
California	6,250	\$28,215,359	\$2,835,265	65,488
Washington	1,333	\$5,278,373	\$575,306	13,377
Colorado	968	\$4,859,036	\$442,712	10,009
Oregon	881	\$2,734,983	\$365,479	8,875
Utah	516	\$1,945,291	\$255,511	6,481
Nevada	328	\$1,592,468	\$124,545	3,203
Idaho	362	\$1,168,945	\$141,715	3,492
New Mexico	351	\$1,012,090	\$129,032	3,115
Wyoming	240	\$865,742	\$103,975	2,435
Montana	243	\$641,521	\$72,008	2,127
Alaska	124	\$501,022	\$60,974	1,132
Hawaii	122	\$319,604	\$37,769	1,072
Arizona	834	D	D	(5000-9999)
<b>Total Region</b>	<b>12,552</b>	<b>\$49,134,434*</b>	<b>\$5,144,291*</b>	<b>120,806*</b>
<b>% of U.S.</b>	<b>19.37%</b>	<b>16.49%</b>	<b>17.08%</b>	<b>17.14%</b>

D = Disclosed Data

\* Does not include all data

**Relocation/Expansion Decision Factors – Physical Infrastructure (Primary Data)**

NAICS 4238 (n=32)	Not Important	Somewhat Important	Important	Very Important
Access within 30 minutes to an interstate hwy	12.50%	15.63%	15.63%	56.25%
Access to Package Freight Services	18.75%	12.50%	18.75%	50.00%
Immediate access to railhead or rail spur	93.55%	3.23%	3.23%	0.00%
Access within 30 minutes to rail freight	87.50%	9.38%	3.13%	0.00%
Access to passenger air service & direct flights	50.00%	18.75%	12.50%	18.75%
Access to port or harbor facilities	81.25%	6.25%	9.38%	3.13%
Access to supplies (one day)	12.50%	15.63%	18.75%	53.13%
Access to customers (one day)	9.38%	15.63%	15.63%	59.38%
Access to 3-phase electric power	18.75%	6.25%	15.63%	59.38%
Access to natural gas pipeline	62.50%	15.63%	12.50%	9.38%
Access to an international trade port	75.00%	12.50%	6.25%	6.25%
Access to fiber optic lines	25.01%	21.88%	31.25%	21.88%
Availability of high volume water supply	56.25%	21.88%	6.25%	15.63%
Availability of high volume wastewater disposal	68.75%	15.63%	6.25%	9.38%
Availability of solid waste disposal	62.50%	18.75%	12.50%	6.25%
Availability of satellite transmission	62.50%	15.63%	12.50%	9.38%
Availability of high speed internet access	6.25%	6.25%	25.00%	62.50%
Availability of public transportation	59.38%	25.00%	6.25%	9.38%
Access to ponds and streams	90.63%	9.38%	0.00%	0.00%
Possibility for future expansion at site	37.50%	25.00%	18.75%	18.75%

### Relocation/Expansion Decision Factors – Economic Infrastructure (Primary Data)

NAICS 4238 (n=32)	Not Important	Somewhat Important	Important	Very Important
Availability of managerial workforce	31.25%	12.50%	31.25%	25.00%
Availability of a skilled workforce	18.75%	15.63%	28.13%	37.50%
Availability of technical workforce	28.13%	21.88%	21.88%	28.13%
Availability of unskilled workforce	46.88%	28.13%	18.75%	6.25%
Favorable local labor costs	15.63%	21.88%	25.00%	37.50%
Favorable workers compensation tax rate	12.50%	12.50%	31.25%	43.75%
Favorable local tax rate	6.25%	15.63%	34.38%	43.75%
Availability of job training programs	40.63%	18.75%	31.25%	9.38%
Availability of long and short term financing	18.75%	21.88%	37.50%	21.88%



**Relocation/Expansion Decision Factors – Quality of Life (Primary Data)**

NAICS 4238 (n=32)	Not Important	Somewhat Important	Important	Very Important
Low Crime Rate	3.13%	6.25%	46.88%	43.75%
Availability and affordability of housing	12.50%	9.38%	50.00%	28.13%
High environmental quality	3.13%	21.88%	56.25%	18.75%
Outdoor recreation opportunities	21.88%	18.75%	40.63%	18.75%
Social and cultural opportunities	28.13%	18.75%	43.75%	9.38%
Retail shopping opportunities	15.63%	37.50%	43.75%	3.13%
Quality of education system	12.50%	12.50%	28.13%	46.88%
Availability of local college or university	21.88%	25.00%	43.75%	9.38%
Availability of quality health care	3.13%	18.75%	34.38%	43.75%
Availability of fire protection	3.13%	6.25%	50.00%	40.63%
Ease of attracting skilled workers	12.50%	12.50%	53.13%	21.88%

**Relocation/Expansion Decision Factors – Sources Used to Find Locations Primary Data)**

NAICS 4238 (n=4)	Don't Use	Use a Little	Use	Use a Lot
Radio and television	75.00%	25.00%	0.00%	0.00%
Local newspaper	50.00%	25.00%	25.00%	0.00%
National newspaper	50.00%	25.00%	25.00%	0.00%
Regional trade publications	25.00%	50.00%	25.00%	0.00%
National trade publications	50.00%	25.00%	25.00%	0.00%
Local chamber of commerce	0.00%	50.00%	25.00%	25.00%
State chamber of commerce	50.00%	0.00%	25.00%	25.00%
Local economic development agencies	0.00%	50.00%	25.00%	25.00%
State economic development agencies	25.00%	25.00%	25.00%	25.00%
Real estate agent	25.00%	25.00%	25.00%	25.00%
Internet	25.00%	50.00%	25.00%	0.00%
Word of mouth	0.00%	0.00%	25.00%	75.00%
Vacation travel experience	75.00%	25.00%	0.00%	0.00%

**Miscellaneous Industry Information (Primary Data)**

NAICS 4238 (n=32)	Not Provided	Provided
Non managerial health insurance	34.38%	65.63%
Non managerial paid vacation	6.26%	93.75%
Non managerial job related training programs	37.50%	62.50%
Non managerial retirement plan with employer contributions	43.76%	56.25%
	Yes	No
Company relocated or expanded in the last 5 years	53.13%	46.88%

If a company (NAICS 4238) would relocate or expand to an additional location in the next 5 years, what is the best estimate of approximately how many total acres of property you would need? (n=32)

Less than 1 acre	71.88%
1 to 3 acres	15.63%
4 to 5 acres	3.13%
Over 5 acres	9.38%

If a company (NAICS 4238) would relocate or expand to an additional location in the next 5 years, what is the best estimate of the total amount of building space in square feet you would need? (Include exterior infrastructure areas like parking, loading docks and/or equipment storage) (n=4)

Less than 10,000 sq. ft.	0.00%
10,000 to 25,000 sq. ft.	25.00%
25,001 to 50,000 sq. ft.	50.00%
50,001 to 75,000 sq. ft.	25.00%
75,001 to 100,000 sq. ft.	0.00%
Over 100,000 sq. ft.	0.00%

If a company (NAICS 4238) would relocate or expand to an additional location in the next 5 years, what is the best estimate of annual sales or revenue at this location? (n=4)

Under \$1 million per year	0.00%
\$1 million to \$2 million per year	50.00%
Over \$2 million to \$3 million per year	25.00%
Over \$3 million to \$5 million per year	25.00%
Over \$5 million to \$10 million per year	0.00%
Over \$10 million per year	0.00%

## NAICS CODE 4243

### **4243 Apparel, Piece Goods & Notions Merchant Wholesalers**

#### **42431 Piece Goods, Notions, Other Dry Goods Merchant Wholesalers**

#### **42432 Men's & Boys' Clothing & Accessory Merchant Wholesalers**

#### **42433 Women's' & Children Clothing & Accessory Merchant Wholesalers**

#### **42434 Footwear Merchant Wholesaler**

**4243 Description:** This NAICS Industry Group includes establishments classified in the following NAICS Industries: 42431, Piece Goods, Notions, and Other Dry Goods Merchant Wholesalers; 42432, Men's and Boys' Clothing and Furnishings Merchant Wholesalers; 42433, Women's, Children's, and Infants' Clothing and Accessories Merchant Wholesalers; and 42434, Footwear Merchant Wholesalers

**42431 Description:** This industry comprises establishments primarily engaged in the merchant wholesale distribution of piece goods, fabrics, knitting yarns (except industrial), thread and other notions, and/or hair accessories.

**42432 Description:** This industry comprises establishments primarily engaged in the merchant wholesale distribution of men's and/or boys' clothing and furnishings.

**42433 Description:** This industry comprises establishments primarily engaged in the merchant wholesale distribution of (1) women's, children's, infants', and/or unisex clothing and accessories and/or (2) fur clothing.

**42434 Description:** This industry comprises establishments primarily engaged in the merchant wholesale distribution of footwear (including athletic) of leather, rubber, and other materials.

### **Economic Census Trends - Employer Only, 2002**

<b>NAICS 4243</b>	<b>2002</b>
Number of Establishments	17,758
Receipts/Revenues (\$1,000)	\$118,346,385
Annual Payroll (\$1,000)	\$8,770,360
Employees	207,115
Average Payroll Per Job	\$42,345
Average Employment Per Establishment	11.66
Average Receipts/Revenue Per Establishment	\$6,664,398

<b>NAICS 42431</b>	<b>2002</b>
Number of Establishments	4,417
Receipts/Revenues (\$1,000)	\$16,382,519
Annual Payroll (\$1,000)	\$1,383,683
Employees	34,768
Average Payroll Per Job	\$39,797
Average Employment Per Establishment	7.87
Average Receipts/Revenue Per Establishment	\$3,708,969

<b>NAICS 42432</b>	<b>2002</b>
Number of Establishments	4,472
Receipts/Revenues (\$1,000)	\$34,053,052
Annual Payroll (\$1,000)	\$2,446,726
Employees	66,189
Average Payroll Per Job	\$36,965
Average Employment Per Establishment	14.80
Average Receipts/Revenue Per Establishment	\$7,614,725

<b>NAICS 42433</b>	<b>2002</b>
Number of Establishments	7,144
Receipts/Revenues (\$1,000)	\$46,834
Annual Payroll (\$1,000)	\$3,543,461
Employees	79,193
Average Payroll Per Job	\$44,744
Average Employment Per Establishment	11.16
Average Receipts/Revenue Per Establishment	\$6,555,820

<b>NAICS 42434</b>	<b>2002</b>
Number of Establishments	1,725
Receipts/Revenues (\$1,000)	\$21,076,032
Annual Payroll (\$1,000)	\$1,396,490
Employees	26,965
Average Payroll Per Job	\$51,788
Average Employment Per Establishment	15.63
Average Receipts/Revenue Per Establishment	\$12,217,989

Source: US Census Bureau

### Top 10 States (NAICS 4243)

	Establishments	Revenues (\$000)	Annual Payroll (\$1,000)	Paid Employees
<b>Total U.S.</b>	<b>17,758</b>	<b>\$118,346,385</b>	<b>\$8,770,360</b>	<b>207,115</b>
New York	4,678	\$39,087,146	\$2,941,055	54,127
California	4,433	\$19,417,682	\$1,527,814	41,706
New Jersey	1,009	\$8,632,368	\$726,298	15,114
Massachusetts	317	\$6,243,046	\$369,639	7,210
Florida	1,277	\$4,394,676	\$309,326	9,066
Oregon	110	\$3,884,182	\$147,706	3,426
North Carolina	423	\$3,317,656	\$205,212	5,739
Texas	779	\$3,172,815	\$278,920	8,531
Illinois	450	\$2,583,237	\$206,127	5,072
Pennsylvania	388	\$2,391,496	\$205,572	5,084
<b>Total</b>	<b>13,864</b>	<b>\$93,124,304</b>	<b>\$6,917,669</b>	<b>155,075</b>
<b>% of U.S.</b>	<b>78.07%</b>	<b>78.69%</b>	<b>78.88%</b>	<b>74.87%</b>

### Western States (NAICS 4243)

	Establishments	Revenues (\$000)	Annual Payroll (\$1,000)	Paid Employees
<b>Total U.S.</b>	<b>17,758</b>	<b>\$118,346,385</b>	<b>\$8,770,360</b>	<b>207,115</b>
California	4,433	\$19,417,682	\$1,527,814	41,706
Oregon	110	\$3,884,182	\$147,706	3,426
Washington	216	\$1,427,010	\$116,335	3,162
Colorado	207	\$754,533	\$79,457	1,859
Nevada	71	\$364,511	\$32,214	887
Hawaii	129	\$208,933	\$22,124	739
Idaho	22	\$32,277	\$3,170	140
New Mexico	23	\$13,042	\$2,742	90
Arizona	151	D	D	500-999
Utah	84	D	D	500-999
Montana	24	D	D	100-249
Wyoming	8	D	D	20-99
Alaska	6	D	D	1-19
<b>Total Region</b>	<b>5,484</b>	<b>\$26,102,170*</b>	<b>\$1,931,562*</b>	<b>91,475*</b>
<b>% of U.S.</b>	<b>30.88%</b>	<b>22.06%</b>	<b>22.02%</b>	<b>44.17%</b>

D = Disclosed Data

\* Does not include all data

**Relocation/Expansion Decision Factors – Physical Infrastructure (Primary Data)**

NAICS 4243 (n=28)	Not Important	Somewhat Important	Important	Very Important
Access within 30 minutes to an interstate hwy	28.57%	10.71%	28.57%	32.14%
Access to Package Freight Services	21.43%	0.00%	21.43%	57.14%
Immediate access to railhead or rail spur	85.71%	0.00%	7.14%	7.14%
Access within 30 minutes to rail freight	78.57%	3.57%	7.14%	10.71%
Access to passenger air service & direct flights	42.86%	17.86%	25.00%	14.29%
Access to port or harbor facilities	60.71%	10.71%	14.29%	14.29%
Access to supplies (one day)	25.00%	14.29%	39.29%	21.43%
Access to customers (one day)	17.86%	10.71%	39.29%	32.14%
Access to 3-phase electric power	25.93%	14.81%	29.63%	29.63%
Access to natural gas pipeline	64.28%	10.71%	14.29%	10.71%
Access to an international trade port	46.43%	14.29%	21.43%	17.86%
Access to fiber optic lines	35.71%	3.57%	32.14%	28.57%
Availability of high volume water supply	75.00%	10.71%	10.71%	3.57%
Availability of high volume wastewater disposal	75.00%	10.71%	10.71%	3.57%
Availability of solid waste disposal	71.43%	14.29%	14.29%	0.00%
Availability of satellite transmission	60.71%	10.71%	17.86%	10.71%
Availability of high speed internet access	10.71%	0.00%	17.86%	71.43%
Availability of public transportation	35.71%	21.43%	32.14%	10.71%
Access to ponds and streams	85.71%	7.14%	3.57%	3.57%
Possibility for future expansion at site	32.14%	21.43%	32.14%	14.29%

**Relocation/Expansion Decision Factors – Economic Infrastructure (Primary Data)**

NAICS 4243 (n=28)	Not Important	Somewhat Important	Important	Very Important
Availability of managerial workforce	25.00%	14.29%	35.71%	25.00%
Availability of a skilled workforce	39.29%	14.29%	28.57%	17.86%
Availability of technical workforce	50.00%	7.14%	25.00%	17.86%
Availability of unskilled workforce	39.29%	25.00%	25.00%	10.71%
Favorable local labor costs	17.86%	21.43%	35.71%	25.00%
Favorable workers compensation tax rate	17.86%	10.71%	42.86%	28.57%
Favorable local tax rate	7.14%	7.14%	53.57%	32.14%
Availability of job training programs	64.29%	10.71%	17.86%	7.14%
Availability of long and short term financing	32.14%	14.29%	35.71%	17.86%

**Relocation/Expansion Decision Factors – Quality of Life (Primary Data)**

NAICS 4243 (n=28)	Not Important	Somewhat Important	Important	Very Important
Low Crime Rate	0.00%	14.29%	42.86%	42.86%
Availability and affordability of housing	32.14%	14.29%	28.57%	25.00%
High environmental quality	7.14%	10.71%	57.14%	25.00%
Outdoor recreation opportunities	46.43%	17.86%	25.00%	10.71%
Social and cultural opportunities	32.14%	25.00%	35.71%	7.14%
Retail shopping opportunities	28.57%	7.14%	42.86%	21.43%
Quality of education system	28.57%	7.14%	32.14%	32.14%
Availability of local college or university	35.71%	14.29%	35.71%	14.29%
Availability of quality health care	3.57%	10.71%	42.86%	42.86%
Availability of fire protection	0.00%	10.71%	50.00%	39.29%
Ease of attracting skilled workers	32.14%	21.43%	28.57%	17.86%

**Relocation/Expansion Decision Factors – Sources Used to Find Locations Primary Data)**

NAICS 4243 (n=6)	Don't Use	Use a Little	Use	Use a Lot
Radio and television	66.67%	33.33%	0.00%	0.00%
Local newspaper	33.33%	66.67%	0.00%	0.00%
National newspaper	83.33%	16.67%	0.00%	0.00%
Regional trade publications	33.33%	66.67%	0.00%	0.00%
National trade publications	66.67%	16.67%	0.00%	16.67%
Local chamber of commerce	50.00%	16.67%	0.00%	33.33%
State chamber of commerce	66.67%	0.00%	0.00%	33.33%
Local economic development agencies	16.67%	50.00%	0.00%	16.67%
State economic development agencies	66.67%	0.00%	0.00%	33.33%
Real estate agent	33.34%	33.33%	0.00%	50.00%
Internet	0.00%	16.67%	16.67%	66.67%
Word of mouth	33.33%	16.67%	16.67%	33.33%
Vacation travel experience	83.33%	16.67%	0.00%	0.00%

### Miscellaneous Industry Information (Primary Data)

NAICS 4243 (n=28)	Not Provided	Provided
Non managerial health insurance	35.71%	64.29%
Non managerial paid vacation	17.86%	82.14%
Non managerial job related training programs	57.14%	42.86%
Non managerial retirement plan with employer contributions	75.00%	25.00%
	Yes	No
Company relocated or expanded in the last 5 years	57.14%	42.86%

If a company (NAICS 4243) would relocate or expand to an additional location in the next 5 years, what is the best estimate of approximately how many total acres of property you would need? (n=28)

Less than 1 acre	32.14%
1 to 3 acres	46.43%
4 to 5 acres	3.57%
Over 5 acres	17.86%

If a company (NAICS 4243) would relocate or expand to an additional location in the next 5 years, what is the best estimate of the total amount of building space in square feet you would need? (Include exterior infrastructure areas like parking, loading docks and/or equipment storage) (n=6)

Less than 10,000 sq. ft.	50.00%
10,000 to 25,000 sq. ft.	16.67%
25,001 to 50,000 sq. ft.	33.33%
50,001 to 75,000 sq. ft.	0.00%
75,001 to 100,000 sq. ft.	0.00%
Over 100,000 sq. ft.	0.00%

If a company (NAICS 4243) would relocate or expand to an additional location in the next 5 years, what is the best estimate of annual sales or revenue at this location? (n=6)

Under \$1 million per year	33.33%
\$1 million to \$2 million per year	16.67%
Over \$2 million to \$3 million per year	16.67%
Over \$3 million to \$5 million per year	0.00%
Over \$5 million to \$10 million per year	0.00%
Over \$10 million per year	33.34%



## NAICS CODE 4812

### 4812 Nonscheduled Air Transportation

**4812 Description:** This industry group comprises establishments primarily engaged in (1) providing air transportation of passengers and/or cargo with no regular routes and regular schedules or (2) providing specialty flying services with no regular routes and regular schedules using general purpose aircraft. These establishments have more flexibility with respect to choice of airports, hours of operation, load factors, and similar operational characteristics.

### Economic Census Trends

NAICS 4812	2002
Number of Establishments	2,182
Receipts/Revenues (\$1,000)	\$7,578,397
Annual Payroll (\$1,000)	\$1,524,164
Employees	32,008
Average Payroll Per Job	\$47,618
Average Employment Per Establishment	14.67
Average Receipts/Revenue Per Establishment	\$3,473,142

Source: US Census Bureau

### Top 10 States (NAICS 4812) - 2002

	Establishments	Revenues (\$000)	Annual Payroll (\$1,000)	Paid Employees
<b>Total U.S.</b>	<b>2,182</b>	<b>\$7,578,397</b>	<b>\$1,524,164</b>	<b>32,008</b>
Ohio	58	\$879,192	\$142,989	2,802
California	221	\$770,284	\$145,219	3,013
Florida	218	\$658,102	\$116,180	2,699
New York	106	\$454,608	\$77,753	1,431
Georgia	40	\$443,724	\$71,031	1,438
Louisiana	44	\$396,598	\$126,589	2,425
Texas	175	\$371,391	\$75,986	1,609
Oregon	51	\$356,894	\$83,080	1,533
Michigan	63	\$299,539	\$78,674	1,542
Minnesota	32	\$234,319	\$38,035	877
<b>Total</b>	<b>1,008</b>	<b>\$4,864,651</b>	<b>\$955,536</b>	<b>19,369</b>
<b>% of U.S.</b>	<b>46.20%</b>	<b>64.19%</b>	<b>62.69%</b>	<b>60.51%</b>

### Western States (NAICS 4812) - 2002

	Establishments	Revenues (\$000)	Annual Payroll (\$1,000)	Paid Employees
<b>Total U.S.</b>	<b>2,182</b>	<b>\$7,578,397</b>	<b>\$1,524,164</b>	<b>32,008</b>
California	221	\$770,284	\$145,219	3,013
Oregon	51	\$356,894	\$83,080	1,533
Alaska	119	\$203,064	\$44,060	981
New Mexico	22	\$74,102	\$10,588	225
Idaho	41	\$59,954	\$15,049	413
Colorado	40	\$59,258	\$13,384	279
Washington	43	\$48,527	\$12,558	319
Nevada	42	\$46,148	\$15,006	320
Montana	33	\$40,379	\$7,582	230
Arizona	32	\$34,834	\$8,909	216
Wyoming	12	\$26,564	\$9,446	224
Hawaii	12	\$25,304	\$6,255	135
Utah	16	D	D	500-999
<b>Total Region</b>	<b>684</b>	<b>\$1,745,312*</b>	<b>\$371,136*</b>	<b>7,888*</b>
<b>% of U.S.</b>	<b>31.35%</b>	<b>23.03%</b>	<b>24.35%</b>	<b>24.64%</b>

D = Disclosed Data

\* Does not include all data

**Relocation/Expansion Decision Factors – Physical Infrastructure (Primary Data)**

NAICS 4812 (n= 48)	Not Important	Somewhat Important	Important	Very Important
Access within 30 minutes to an interstate hwy	45.83%	20.83%	14.58%	18.75%
Access to Package Freight Services	25.00%	27.08%	27.08%	20.83%
Immediate access to railhead or rail spur	97.92%	2.08%	0.00%	0.00%
Access within 30 minutes to rail freight	95.83%	4.17%	0.00%	0.00%
Access to passenger air service & direct flights	38.30%	10.64%	21.28%	29.79%
Access to port or harbor facilities	83.33%	10.42%	2.08%	4.17%
Access to supplies (one day)	20.83%	25.00%	31.25%	22.92%
Access to customers (one day)	27.08%	14.58%	25.00%	33.33%
Access to 3-phase electric power	29.17%	10.42%	29.17%	31.25%
Access to natural gas pipeline	56.25%	12.50%	20.83%	10.42%
Access to an international trade port	85.42%	10.42%	2.08%	2.08%
Access to fiber optic lines	37.50%	25.00%	20.83%	16.67%
Availability of high volume water supply	68.75%	14.58%	12.50%	4.17%
Availability of high volume wastewater disposal	75.00%	16.67%	6.25%	2.08%
Availability of solid waste disposal	50.00%	22.92%	20.83%	6.25%
Availability of satellite transmission	33.33%	29.17%	22.92%	14.58%
Availability of high speed internet access	8.33%	10.42%	22.92%	58.33%
Availability of public transportation	50.00%	22.92%	6.25%	20.83%
Access to ponds and streams	83.33%	8.33%	2.08%	6.25%
Possibility for future expansion at site	27.08%	31.25%	18.75%	22.92%

**Relocation/Expansion Decision Factors – Economic Infrastructure (Primary Data)**

NAICS 4812 (n=48)	Not Important	Somewhat Important	Important	Very Important
Availability of managerial workforce	31.25%	29.17%	22.92%	16.67%
Availability of a skilled workforce	12.50%	22.92%	33.33%	31.25%
Availability of technical workforce	16.67%	29.17%	29.17%	25.00%
Availability of unskilled workforce	56.25%	22.92%	14.58%	6.25%
Favorable local labor costs	27.08%	16.67%	35.42%	20.83%
Favorable workers compensation tax rate	8.33%	14.58%	29.17%	47.92%
Favorable local tax rate	6.25%	12.50%	31.25%	50.00%
Availability of job training programs	58.33%	35.42%	4.17%	2.08%
Availability of long and short term financing	22.92%	27.08%	31.25%	18.75%

**Relocation/Expansion Decision Factors – Quality of Life (Primary Data)**

NAICS 4812 (n=48)	Not Important	Somewhat Important	Important	Very Important
Low Crime Rate	4.17%	8.33%	41.67%	45.83%
Availability and affordability of housing	14.58%	12.50%	39.58%	33.33%
High environmental quality	8.33%	25.00%	33.33%	33.33%
Outdoor recreation opportunities	20.83%	22.92%	33.33%	22.92%
Social and cultural opportunities	16.67%	33.33%	29.17%	20.83%
Retail shopping opportunities	20.83%	35.42%	29.17%	14.58%
Quality of education system	12.50%	12.50%	35.42%	39.58%
Availability of local college or university	22.92%	31.25%	31.25%	14.58%
Availability of quality health care	6.25%	12.50%	37.50%	43.75%
Availability of fire protection	2.08%	10.42%	33.33%	54.17%
Ease of attracting skilled workers	16.67%	18.75%	35.42%	29.17%

**Relocation/Expansion Decision Factors – Sources Used to Find Locations (Primary Data)**

NAICS 4812 (n=16)	Don't Use	Use a Little	Use	Use a Lot
Radio and television	81.25%	6.25%	6.25%	6.25%
Local newspaper	43.75%	50.00%	0.00%	6.25%
National newspaper	68.75%	31.25%	0.00%	0.00%
Regional trade publications	6.25%	62.50%	25.00%	6.25%
National trade publications	18.75%	43.75%	25.00%	12.50%
Local chamber of commerce	50.00%	31.25%	6.25%	12.50%
State chamber of commerce	68.75%	25.00%	6.25%	0.00%
Local economic development agencies	34.50%	43.75%	0.00%	18.75%
State economic development agencies	50.00%	31.25%	6.25%	12.50%
Real estate agent	18.75%	31.25%	18.75%	31.25%
Internet	0.00%	6.25%	12.50%	81.25%
Word of mouth	6.25%	31.25%	12.50%	50.00%
Vacation travel experience	50.00%	18.75%	6.25%	25.00%

**Miscellaneous Industry Information (Primary Data)**

NAICS 4812 (n=48)	Not Provided	Provided
Non managerial health insurance	41.67%	58.33%
Non managerial paid vacation	27.08%	72.92%
Non managerial job related training programs	14.58%	85.42%
Non managerial retirement plan with employer contributions	47.92%	52.08%
	Yes	No
Company relocated or expanded in the last 5 years	47.92%	52.08%

If a company (NAICS 4812) would relocate or expand to an additional location in the next 5 years, what is the best estimate of approximately how many total acres of property you would need? (n=48)

Less than 1 acre	43.75%
1 to 3 acres	22.92%
4 to 5 acres	25.00%
Over 5 acres	8.33%

If a company (NAICS 4812) would relocate or expand to an additional location in the next 5 years, what is the best estimate of the total amount of building space in square feet you would need? (Include exterior infrastructure areas like parking, loading docks and/or equipment storage) (n=16 )

Less than 10,000 sq. ft.	40.00%
10,000 to 25,000 sq. ft.	26.67%
25,001 to 50,000 sq. ft.	20.00%
50,001 to 75,000 sq. ft.	6.67%
75,001 to 100,000 sq. ft.	6.67%
Over 100,000 sq. ft.	0.00%

If a company (NAICS 4812) would relocate or expand to an additional location in the next 5 years, what is the best estimate of annual sales or revenue at this location? (n=16)

Under \$1 million per year	25.00%
\$1 million to \$2 million per year	25.00%
Over \$2 million to \$3 million per year	25.00%
Over \$3 million to \$5 million per year	0.00%
Over \$5 million to \$10 million per year	12.50%
Over \$10 million per year	6.25%
Don't know	6.25%

## NAICS CODE 4841

### **4841 General Freight Trucking**

#### **48411 General Freight Trucking, Local**

#### **48412 General Freight Trucking, Long-Distance**

**4841 Description:** This industry group comprises establishments primarily engaged in providing general freight trucking. General freight establishments handle a wide variety of commodities, generally palletized and transported in a container or van trailer. The establishments of this industry group provide a combination of the following network activities: local pickup, local sorting and terminal operations, line-haul, destination sorting and terminal operations, and local delivery.

**48411 Description:** This industry comprises establishments primarily engaged in providing local general freight trucking. General freight establishments handle a wide variety of commodities, generally palletized and transported in a container or van trailer. Local general freight trucking establishments usually provide trucking within a metropolitan area which may cross state lines. Generally the trips are same-day return.

**48412 Description:** This industry comprises establishments primarily engaged in providing long-distance general freight trucking. General freight establishments handle a wide variety of commodities, generally palletized and transported in a container or van trailer. Long-distance general freight trucking establishments usually provide trucking between metropolitan areas which may cross North American country borders. Included in this industry are establishments operating as truckload (TL) or less than truckload (LTL) carriers.

## Economic Census Trends – Employers Only, 2002

<b>NAICS 4841</b>	<b>2002</b>
Number of Establishments	59,120
Receipts/Revenues (\$1,000)	\$111,550,298
Annual Payroll (\$1,000)	\$34,230,272
Employees	992,918
Average Payroll Per Job	\$34,474
Average Employment Per Establishment	16.79
Average Receipts/Revenue Per Establishment	\$1,886,845

<b>NAICS 48411</b>	<b>2002</b>
Number of Establishments	21,674
Receipts/Revenues (\$1,000)	\$18,070,892
Annual Payroll (\$1,000)	\$5,742,657
Employees	184,783
Average Payroll Per Job	\$31,077
Average Employment Per Establishment	8.53
Average Receipts/Revenue Per Establishment	\$833,758

<b>NAICS 48412</b>	<b>2002</b>
Number of Establishments	37,446
Receipts/Revenues (\$1,000)	\$93,479,406
Annual Payroll (\$1,000)	\$28,487,615
Employees	684,730
Average Payroll Per Job	\$41,604
Average Employment Per Establishment	18.29
Average Receipts/Revenue Per Establishment	\$2,496,378

Source: US Census Bureau

### Top 10 States (NAICS 4841) – Employers Only 2002

	Establishments	Revenues (\$000)	Annual Payroll (\$1,000)	Paid Employees
<b>Total U.S.</b>	<b>59,011</b>	<b>\$110,239,101</b>	<b>\$34,120,535</b>	<b>989,192</b>
California	4,389	\$8,471,927	\$2,640,844	76,855
Texas	4,269	\$6,829,633	\$2,282,416	67,756
Illinois	3,451	\$6,474,196	\$1,989,873	56,407
Ohio	2,691	\$6,158,740	\$1,816,703	50,637
Pennsylvania	2,224	\$4,619,211	\$1,583,102	44,481
Tennessee	1,524	\$4,408,940	\$1,525,949	43,416
Indiana	1,965	\$4,223,968	\$1,206,598	35,613
Wisconsin	1,888	\$4,131,915	\$1,240,105	35,052
New Jersey	1,795	\$3,872,770	\$1,225,499	29,076
Georgia	1,757	\$3,838,561	\$1,319,378	37,031
<b>Total</b>	<b>25,953</b>	<b>\$53,029,861</b>	<b>\$16,830,467</b>	<b>476,324</b>
<b>% of U.S.</b>	<b>43.98%</b>	<b>48.10%</b>	<b>49.33%</b>	<b>48.15%</b>

### Western States (NAICS 4841) - 2002

	Establishments	Revenues (\$000)	Annual Payroll (\$1,000)	Paid Employees
<b>Total U.S.</b>	<b>59,011</b>	<b>\$110,239,101</b>	<b>\$34,120,535</b>	<b>989,192</b>
California	4,389	\$8,471,927	\$2,640,844	76,855
Washington	1,123	\$1,664,526	\$502,031	14,394
Oregon	759	\$1,646,416	\$522,157	14,293
Utah	634	\$1,455,100	\$461,813	14,108
Colorado	845	\$1,127,147	\$367,415	10,813
New Mexico	333	\$588,829	\$140,025	4,054
Nevada	316	\$512,391	\$132,642	3,875
Idaho	542	\$478,097	\$119,547	4,270
Montana	374	\$450,947	\$97,767	3,088
Alaska	108	\$304,033	\$69,048	1,526
Wyoming	230	\$140,225	\$40,068	1,318
Hawaii	94	\$126,998	\$44,739	1,539
Arizona	791	D	D	25K-49K
<b>Total Region</b>	<b>10,538</b>	<b>\$16,966,636*</b>	<b>\$5,138,096*</b>	<b>150,133*</b>
<b>% of U.S.</b>	<b>17.86%</b>	<b>15.39%</b>	<b>15.06%</b>	<b>15.18%</b>

D = Disclosed Data

\* Does not include all data



### Relocation/Expansion Decision Factors – Physical Infrastructure (Primary Data)

NAICS 4841 (n=36)	Not Important	Somewhat Important	Important	Very Important
Access within 30 minutes to an interstate hwy	19.44%	13.89%	22.22%	44.44%
Access to Package Freight Services	63.89%	8.33%	11.11%	16.67%
Immediate access to railhead or rail spur	75.00%	11.11%	8.33%	5.56%
Access within 30 minutes to rail freight	77.78%	8.33%	11.11%	2.78%
Access to passenger air service & direct flights	61.11%	13.89%	11.11%	13.89%
Access to port or harbor facilities	77.78%	2.78%	19.44%	0.00%
Access to supplies (one day)	17.14%	20.00%	40.00%	22.86%
Access to customers (one day)	30.56%	8.33%	27.78%	33.33%
Access to 3-phase electric power	44.44%	8.33%	22.22%	25.00%
Access to natural gas pipeline	61.11%	11.11%	13.89%	13.89%
Access to an international trade port	72.22%	8.33%	16.67%	2.78%
Access to fiber optic lines	47.22%	13.89%	19.44%	19.44%
Availability of high volume water supply	69.44%	16.67%	11.11%	2.78%
Availability of high volume wastewater disposal	75.00%	11.11%	8.33%	5.56%
Availability of solid waste disposal	63.89%	13.89%	13.89%	8.33%
Availability of satellite transmission	58.33%	8.33%	25.00%	8.33%
Availability of high speed internet access	27.78%	11.11%	22.22%	38.89%
Availability of public transportation	63.89%	11.11%	19.44%	5.56%
Access to ponds and streams	91.43%	2.86%	5.71%	0.00%
Possibility for future expansion at site	19.44%	30.56%	38.89%	11.11%

### Relocation/Expansion Decision Factors – Economic Infrastructure (Primary Data)

NAICS 4841 (n=36)	Not Important	Somewhat Important	Important	Very Important
Availability of managerial workforce	36.11%	16.67%	33.33%	13.89%
Availability of a skilled workforce	11.11%	11.11%	47.22%	30.56%
Availability of technical workforce	51.43%	20.00%	20.00%	8.57%
Availability of unskilled workforce	50.00%	11.11%	27.78%	11.11%
Favorable local labor costs	13.89%	11.11%	41.67%	33.33%
Favorable workers compensation tax rate	5.56%	2.78%	38.89%	52.78%
Favorable local tax rate	8.33%	11.11%	36.11%	44.44%
Availability of job training programs	52.78%	13.89%	27.78%	5.56%
Availability of long and short term financing	13.89%	19.44%	44.44%	22.22%

**Relocation/Expansion Decision Factors – Quality of Life (Primary Data)**

NAICS 4841 (n=36)	Not Important	Somewhat Important	Important	Very Important
Low Crime Rate	0.00%	5.56%	55.56%	38.89%
Availability and affordability of housing	25.00%	13.89%	38.89%	22.22%
High environmental quality	25.00%	19.44%	38.89%	16.67%
Outdoor recreation opportunities	41.67%	27.78%	25.00%	5.56%
Social and cultural opportunities	41.67%	33.33%	16.67%	8.33%
Retail shopping opportunities	41.67%	33.33%	13.89%	11.11%
Quality of education system	25.00%	16.67%	30.56%	27.78%
Availability of local college or university	38.89%	25.00%	25.00%	11.11%
Availability of quality health care	13.89%	8.33%	38.89%	38.89%
Availability of fire protection	5.56%	2.78%	55.56%	36.11%
Ease of attracting skilled workers	8.33%	22.22%	47.22%	22.22%

**Relocation/Expansion Decision Factors – Sources Used to Find Locations Primary Data)**

NAICS 4841 (n=12)	Don't Use	Use a Little	Use	Use a Lot
Radio and television	50.00%	25.00%	8.33%	16.67%
Local newspaper	8.33%	41.67%	16.67%	33.33%
National newspaper	66.67%	16.67%	8.33%	8.33%
Regional trade publications	25.00%	41.67%	8.33%	25.00%
National trade publications	58.33%	41.67%	0.00%	0.00%
Local chamber of commerce	41.67%	25.00%	16.67%	16.67%
State chamber of commerce	58.33%	25.00%	8.33%	8.33%
Local economic development agencies	25.00%	41.67%	8.33%	25.00%
State economic development agencies	58.33%	16.67%	0.00%	25.00%
Real estate agent	8.33%	25.00%	50.00%	16.67%
Internet	0.00%	8.33%	33.33%	58.33%
Word of mouth	0.00%	16.67%	50.00%	33.33%
Vacation travel experience	75.00%	16.67%	0.00%	8.33%

**Miscellaneous Industry Information (Primary Data)**

NAICS 4841 (n=36)	Not Provided	Provided
Non managerial health insurance	41.67%	58.33%
Non managerial paid vacation	27.78%	72.22%
Non managerial job related training programs	30.56%	69.44%
Non managerial retirement plan with employer contributions	66.67%	33.33%
	Yes	No
Company relocated or expanded in the last 5 years	50.00%	50.00%

If a company (NAICS 4841) would relocate or expand to an additional location in the next 5 years, what is the best estimate of approximately how many total acres of property you would need? (n=36)

Less than 1 acre	47.22%
1 to 3 acres	19.44%
4 to 5 acres	19.44%
Over 5 acres	13.89%

If a company (NAICS 4841) would relocate or expand to an additional location in the next 5 years, what is the best estimate of the total amount of building space in square feet you would need? (Include exterior infrastructure areas like parking, loading docks and/or equipment storage) (n=12)

Less than 10,000 sq. ft.	16.67%
10,000 to 25,000 sq. ft.	25.00%
25,001 to 50,000 sq. ft.	33.33%
50,001 to 75,000 sq. ft.	16.67%
75,001 to 100,000 sq. ft.	8.33%
Over 100,000 sq. ft.	0.00%

If a company (NAICS 4841) would relocate or expand to an additional location in the next 5 years, what is the best estimate of annual sales or revenue at this location? (n=12)

Under \$1 million per year	8.33%
\$1 million to \$2 million per year	50.00%
Over \$2 million to \$3 million per year	8.33%
Over \$3 million to \$5 million per year	0.00%
Over \$5 million to \$10 million per year	0.00%
Over \$10 million per year	8.33%

## NAICS CODE 5121

### 5121 Motion Picture & Video Industries

#### 51211 Motion Picture & Video Production

#### 51212 Motion Picture & Video Distribution

#### 51213 Motion Picture & Video Exhibition

#### 51219 Postproduction & Other Motion Picture Industries

**5121 Description:** This industry group comprises establishments primarily engaged in the production and/or distribution of motion pictures, videos, television programs, or commercials; in the exhibition of motion pictures; or in the provision of postproduction and related services.

**51211 Description:** This industry comprises establishments primarily engaged in producing, or producing and distributing motion pictures, videos, television programs, or television and video commercials.

**51212 Description:** This industry comprises establishments primarily engaged in acquiring distribution rights and distributing film and video productions to motion picture theaters, television networks and stations, and exhibitors.

**51213 Description:** This industry comprises establishments primarily engaged in operating motion picture theaters and/or exhibiting motion pictures or videos at film festivals, and so forth.

**51219 Description:** This industry comprises establishments primarily engaged in providing postproduction services and other services to the motion picture industry, including specialized motion picture or video postproduction services, such as editing, film/tape transfers, subtitling, credits, closed captioning, and computer-produced graphics, animation and special effects, as well as developing and processing motion picture film.

### Economic Census Trends, 1997

NAICS 5121	1997
Number of Establishments	19,269
Receipts/Revenues (\$1,000)	\$44,785,652
Annual Payroll (\$1,000)	\$8,280,395
Employees	254,467
Average Payroll Per Job	\$32,540
Average Employment Per Establishment	13.21
Average Receipts/Revenue Per Establishment	\$2,324,233

<b>NAICS 51211</b>	<b>1997</b>
Number of Establishments	8,777
Receipts/Revenues (\$1,000)	\$20,152,091
Annual Payroll (\$1,000)	\$4,944,605
Employees	83,558
Average Payroll Per Job	\$59,175
Average Employment Per Establishment	9.52
Average Receipts/Revenue Per Establishment	\$2,296,011

<b>NAICS 51212</b>	<b>1997</b>
Number of Establishments	756
Receipts/Revenues (\$1,000)	\$12,508,661
Annual Payroll (\$1,000)	\$766,780
Employees	12,663
Average Payroll Per Job	\$60,552
Average Employment Per Establishment	16.68
Average Receipts/Revenue Per Establishment	\$16,545,847

<b>NAICS 51213</b>	<b>1997</b>
Number of Establishments	6,358
Receipts/Revenues (\$1,000)	\$7,597,319
Annual Payroll (\$1,000)	\$944,454
Employees	125,041
Average Payroll Per Job	\$7,553
Average Employment Per Establishment	19.67
Average Receipts/Revenue Per Establishment	\$1,194,922

<b>NAICS 51219</b>	<b>1997</b>
Number of Establishments	3,378
Receipts/Revenues (\$1,000)	\$4,527,581
Annual Payroll (\$1,000)	\$1,624,556
Employees	33,205
Average Payroll Per Job	\$48,925
Average Employment Per Establishment	9.83
Average Receipts/Revenue Per Establishment	\$1,340,314

Source: US Census Bureau

### Top 10 States (NAICS 5121)

	Establishments	Revenues (\$000)	Annual Payroll (\$1,000)	Paid Employees
<b>Total U.S.</b>	<b>19,269</b>	<b>\$44,785,652</b>	<b>\$8,282,395</b>	<b>254,467</b>
California	5,540	\$26,095,679	\$4,900,908	91,605
New York	2,242	\$5,908,716	\$970,125	21,459
Texas	851	\$1,766,613	\$235,329	14,958
Illinois	786	\$1,480,384	\$320,486	9,580
Florida	905	\$979,462	\$182,473	10,116
Georgia	394	\$675,484	\$109,558	4,477
Pennsylvania	500	\$593,198	\$116,876	6,277
Ohio	435	\$549,962	\$133,707	8,187
Massachusetts	380	\$478,847	\$80,382	4,654
Michigan	444	\$470,851	\$89,836	6,039
<b>Total</b>	<b>12,477</b>	<b>\$38,999,196</b>	<b>\$7,139,680</b>	<b>177,352</b>
<b>% of U.S.</b>	<b>64.75%</b>	<b>87.08%</b>	<b>86.20%</b>	<b>69.70%</b>

### Western States (NAICS 5121)

	Establishments	Revenues (\$000)	Annual Payroll (\$1,000)	Paid Employees
<b>Total U.S.</b>	<b>19,269</b>	<b>\$44,785,652</b>	<b>\$8,282,395</b>	<b>254,467</b>
California	5,540	\$26,095,679	\$4,900,908	91,605
Colorado	356	361,037	60,067	3,711
Washington	354	312,779	66,596	4,032
Arizona	237	273,287	39,484	3,273
Utah	175	178,607	29,026	2,155
Oregon	219	174,220	37,314	2,530
Nevada	103	102,837	20,604	1,182
Hawaii	99	95,860	19,526	1,473
New Mexico	115	71,594	12,502	1,287
Montana	73	34,043	6,566	687
Idaho	77	D	D	500-999
Alaska	37	D	D	250-499
Wyoming	45	D	D	250-499
<b>Total Region</b>	<b>7,430</b>	<b>\$27,699,943*</b>	<b>\$5,192,593*</b>	<b>111,935*</b>
<b>% of U.S.</b>	<b>38.56%</b>	<b>61.85%</b>	<b>62.69%</b>	<b>43.99%</b>

D = Disclosed Data

\* Does not include all data

### Relocation/Expansion Decision Factors – Physical Infrastructure (Primary Data)

NAICS 5121 (n=46)	Not Important	Somewhat Important	Important	Very Important
Access within 30 minutes to an interstate hwy	23.91%	17.39%	21.74%	36.96%
Access to Package Freight Services	13.33%	13.33%	31.11%	42.22%
Immediate access to railhead or rail spur	93.48%	4.35%	0.00%	2.17%
Access within 30 minutes to rail freight	95.65%	0.00%	0.00%	4.35%
Access to passenger air service & direct flights	19.57%	34.78%	23.91%	21.74%
Access to port or harbor facilities	89.13%	6.52%	0.00%	4.35%
Access to supplies (one day)	10.87%	17.39%	36.96%	34.78%
Access to customers (one day)	26.09%	4.35%	23.91%	45.65%
Access to 3-phase electric power	31.11%	15.56%	28.89%	24.44%
Access to natural gas pipeline	71.74%	8.70%	10.87%	8.70%
Access to an international trade port	84.78%	6.52%	4.35%	4.35%
Access to fiber optic lines	23.91%	17.39%	23.91%	34.78%
Availability of high volume water supply	71.74%	13.04%	10.87%	4.35%
Availability of high volume wastewater disposal	84.78%	2.17%	6.52%	6.52%
Availability of solid waste disposal	71.74%	13.04%	6.52%	8.70%
Availability of satellite transmission	36.96%	21.74%	19.57%	21.74%
Availability of high speed internet access	0.00%	0.00%	28.26%	71.74%
Availability of public transportation	56.52%	17.39%	10.87%	15.22%
Access to ponds and streams	84.78%	8.70%	4.35%	2.17%
Possibility for future expansion at site	34.78%	21.74%	26.09%	17.39%

### Relocation/Expansion Decision Factors – Economic Infrastructure (Primary Data)

NAICS 5121 (n=46)	Not Important	Somewhat Important	Important	Very Important
Availability of managerial workforce	41.30%	28.26%	10.87%	19.57%
Availability of a skilled workforce	26.09%	13.04%	28.26%	32.61%
Availability of technical workforce	13.04%	21.74%	23.91%	41.30%
Availability of unskilled workforce	63.04%	28.26%	8.70%	0.00%
Favorable local labor costs	32.60%	19.57%	23.91%	23.91%
Favorable workers compensation tax rate	23.91%	15.22%	36.96%	23.91%
Favorable local tax rate	10.87%	21.74%	34.78%	32.61%
Availability of job training programs	58.70%	19.57%	13.04%	8.70%
Availability of long and short term financing	19.57%	30.43%	28.26%	21.74%

**Relocation/Expansion Decision Factors – Quality of Life (Primary Data)**

NAICS 5121 (n=46)	Not Important	Somewhat Important	Important	Very Important
Low Crime Rate	0.00%	10.87%	36.96%	52.17%
Availability and affordability of housing	15.22%	26.09%	30.43%	28.26%
High environmental quality	4.35%	21.74%	30.43%	43.48%
Outdoor recreation opportunities	26.09%	17.39%	28.26%	28.26%
Social and cultural opportunities	10.87%	21.74%	32.61%	34.78%
Retail shopping opportunities	19.57%	30.43%	26.09%	23.91%
Quality of education system	13.04%	17.39%	23.91%	47.83%
Availability of local college or university	17.39%	30.43%	26.09%	26.09%
Availability of quality health care	6.52%	8.70%	30.43%	54.35%
Availability of fire protection	2.17%	10.87%	41.30%	43.48%
Ease of attracting skilled workers	17.39%	26.09%	34.78%	21.74%

**Relocation/Expansion Decision Factors – Sources Used to Find Locations Primary Data)**

NAICS 5121 (n=8)	Don't Use	Use a Little	Use	Use a Lot
Radio and television	75.00%	0.00%	25.00%	0.00%
Local newspaper	50.00%	25.00%	25.00%	0.00%
National newspaper	62.50%	25.00%	12.50%	0.00%
Regional trade publications	62.50%	12.50%	25.00%	0.00%
National trade publications	62.50%	0.00%	25.00%	12.50%
Local chamber of commerce	62.50%	12.50%	25.00%	0.00%
State chamber of commerce	62.50%	12.50%	25.00%	0.00%
Local economic development agencies	50.00%	12.50%	25.00%	12.50%
State economic development agencies	75.00%	0.00%	12.50%	12.50%
Real estate agent	12.50%	12.50%	62.50%	12.50%
Internet	12.50%	0.00%	37.50%	50.00%
Word of mouth	25.00%	0.00%	37.50%	37.50%
Vacation travel experience	37.50%	12.50%	25.00%	25.00%



**Miscellaneous Industry Information (Primary Data)**

NAICS 5121 (n=46)	Not Provided	Provided
Non managerial health insurance	42.22%	57.78%
Non managerial paid vacation	33.33%	66.67%
Non managerial job related training programs	46.66%	53.33%
Non managerial retirement plan with employer contributions	55.55%	44.44%
	Yes	No
Company relocated or expanded in the last 5 years	67.39%	32.61%

If a company (NAICS 5121) would relocate or expand to an additional location in the next 5 years, what is the best estimate of approximately how many total acres of property you would need? (n=46)

Less than 1 acre	56.52%
1 to 3 acres	26.09%
4 to 5 acres	13.04%
Over 5 acres	4.35%

If a company (NAICS 5121) would relocate or expand to an additional location in the next 5 years, what is the best estimate of the total amount of building space in square feet you would need? (Include exterior infrastructure areas like parking, loading docks and/or equipment storage) (n=8)

Less than 10,000 sq. ft.	50.00%
10,000 to 25,000 sq. ft.	25.00%
25,001 to 50,000 sq. ft.	12.50%
50,001 to 75,000 sq. ft.	12.50%
75,001 to 100,000 sq. ft.	0.00%
Over 100,000 sq. ft.	0.00%

If a company (NAICS 5121) would relocate or expand to an additional location in the next 5 years, what is the best estimate of annual sales or revenue at this location? (n= 8)

Under \$1 million per year	50.00%
\$1 million to \$2 million per year	25.00%
Over \$2 million to \$3 million per year	12.50%
Over \$3 million to \$5 million per year	0.00%
Over \$5 million to \$10 million per year	12.50%
Over \$10 million per year	0.00%

## NAICS CODE 5413

### **5413 Architectural, Engineering & Related Services**

#### **54131 Architectural Services**

#### **54133 Engineering Services**

#### **54134 Drafting Services**

#### **54135 Building Inspector Services**

#### **54136 Geophysical Surveying & Mapping Services**

#### **54137 Surveying & Mapping (except geophysical) services**

#### **54138 Testing Laboratories**

**5413 Description:** This NAICS industry group includes establishments classified in the following NAICS industries: 54131, Architectural Services; 54133, Engineering Services; 54134, Drafting Services; 54135, Building Inspection Services; 54136, Geophysical Surveying and Mapping Services; 54137, Surveying and Mapping (Except Geophysical) Services; and 54138, Testing Laboratories

**54131 Description:** This industry comprises establishments primarily engaged in planning and designing residential, institutional, leisure, commercial, and industrial buildings and structures by applying knowledge of design, construction procedures, zoning regulations, building codes, and building materials.

**54133 Description:** This industry comprises establishments primarily engaged in applying physical laws and principles of engineering in the design, development, and utilization of machines, materials, instruments, structures, processes, and systems. The assignments undertaken by these establishments may involve any of the following activities: provision of advice, preparation of feasibility studies, preparation of preliminary and final plans and designs, provision of technical services during the construction or installation phase, inspection and evaluation of engineering projects, and related services.

**54134 Description:** This industry comprises establishments primarily engaged in drawing detailed layouts, plans, and illustrations of buildings, structures, systems, or components from engineering and architectural specifications.

**54135 Description:** This industry comprises establishments primarily engaged in providing building inspection services. These establishments typically evaluate all aspects of the building structure and component systems and prepare a report on the physical condition of the property, generally for buyers or others involved in real estate transactions. Building inspection bureaus and establishments providing home inspection services are included in this industry.

**54136 Description:** This industry comprises establishments primarily engaged in gathering, interpreting, and mapping geophysical data. Establishments in this industry often specialize in locating and measuring the extent of subsurface resources, such as oil, gas, and minerals, but they may also conduct surveys for engineering purposes.

Establishments in this industry use a variety of surveying techniques depending on the purpose of the survey, including magnetic surveys, gravity surveys, seismic surveys, or electrical and electromagnetic surveys.

**54137 Description:** This industry comprises establishments primarily engaged in performing surveying and mapping services of the surface of the earth, including the sea floor. These services may include surveying and mapping of areas above or below the surface of the earth, such as the creation of view easements or segregating rights in parcels of land by creating underground utility easements.

**54138 Description:** This industry comprises establishments primarily engaged in performing physical, chemical, and other analytical testing services, such as acoustics or vibration testing, assaying, biological testing (except medical and veterinary), calibration testing, electrical and electronic testing, geotechnical testing, mechanical testing, nondestructive testing, or thermal testing. The testing may occur in a laboratory or on-site.

### Economic Census Trends, 1997

<b>NAICS 5413</b>	<b>1997</b>
Number of Establishments	92,710
Receipts/Revenues (\$1,000)	\$116,986,061
Annual Payroll (\$1,000)	\$46,942,816
Employees	1,038,317
Average Payroll Per Job	\$45,210
Average Employment Per Establishment	11.20
Average Receipts/Revenue Per Establishment	\$1,261,849

<b>NAICS 54131</b>	<b>1997</b>
Number of Establishments	20,602
Receipts/Revenues (\$1,000)	\$16,988,338
Annual Payroll (\$1,000)	\$6,468,524
Employees	146,702
Average Payroll Per Job	\$44,092
Average Employment Per Establishment	7.12
Average Receipts/Revenue Per Establishment	\$824,596

<b>NAICS 54133</b>	<b>1997</b>
Number of Establishments	52,526
Receipts/Revenues (\$1,000)	\$88,180,688
Annual Payroll (\$1,000)	\$35,337,890
Employees	730,048
Average Payroll Per Job	\$48,404
Average Employment Per Establishment	13.90
Average Receipts/Revenue Per Establishment	\$1,678,800

<b>NAICS 54134</b>	<b>1997</b>
Number of Establishments	1,872
Receipts/Revenues (\$1,000)	\$605,362
Annual Payroll (\$1,000)	\$310,342
Employees	9,150
Average Payroll Per Job	\$33,917
Average Employment Per Establishment	4.89
Average Receipts/Revenue Per Establishment	\$323,377

<b>NAICS 54135</b>	<b>1997</b>
Number of Establishments	2,771
Receipts/Revenues (\$1,000)	\$639,041
Annual Payroll (\$1,000)	\$240,080
Employees	8,674
Average Payroll Per Job	\$27,678
Average Employment Per Establishment	3.13
Average Receipts/Revenue Per Establishment	\$230,617

<b>NAICS 54136</b>	<b>1997</b>
Number of Establishments	587
Receipts/Revenues (\$1,000)	\$1,087,786
Annual Payroll (\$1,000)	\$445,595
Employees	9,905
Average Payroll Per Job	\$44,986
Average Employment Per Establishment	16.87
Average Receipts/Revenue Per Establishment	\$1,853,127

<b>NAICS 54137</b>	<b>1997</b>
Number of Establishments	8,864
Receipts/Revenues (\$1,000)	\$3,041,882
Annual Payroll (\$1,000)	\$1,431,603
Employees	51,814
Average Payroll Per Job	\$27,629
Average Employment Per Establishment	5.85
Average Receipts/Revenue Per Establishment	\$343,174

<b>NAICS 54138</b>	<b>1997</b>
Number of Establishments	5,488
Receipts/Revenues (\$1,000)	\$6,442,964
Annual Payroll (\$1,000)	\$2,708,782
Employees	82,024
Average Payroll Per Job	\$33,024
Average Employment Per Establishment	14.95
Average Receipts/Revenue Per Establishment	\$1,174,009

Source: US Census Bureau

### Top 10 States (NAICS 5413), 1997

	Establishments	Revenues (\$000)	Annual Payroll (\$1,000)	Paid Employees
<b>Total U.S.</b>	<b>92,710</b>	<b>\$116,986,061</b>	<b>\$46,942,816</b>	<b>1,038,317</b>
California	11,857	\$16,407,512	\$6,553,709	129,826
Texas	7,004	\$11,988,287	\$4,463,706	92,449
Pennsylvania	3,583	\$6,414,891	\$2,771,309	58,166
Virginia	2,899	\$5,607,156	\$2,437,419	52,792
New York	4,692	\$5,476,648	\$2,212,477	47,439
Florida	6,125	\$5,152,349	\$2,031,394	52,415
Massachusetts	2,694	\$5,029,239	\$1,860,583	38,025
Illinois	3,634	\$4,668,540	\$1,900,001	40,670
Michigan	3,327	\$4,292,751	\$1,975,527	42,085
South Carolina	1,139	\$4,161,254	\$809,915	16,571
<b>Total</b>	<b>46,954</b>	<b>\$69,198,627</b>	<b>\$27,016,040</b>	<b>570,438</b>
<b>% of U.S.</b>	<b>50.65%</b>	<b>59.15%</b>	<b>57.55%</b>	<b>54.94%</b>

### Western States (NAICS 5413)

	Establishments	Revenues (\$000)	Annual Payroll (\$1,000)	Paid Employees
<b>Total U.S.</b>	<b>92,710</b>	<b>\$116,986,061</b>	<b>\$46,942,816</b>	<b>1,038,317</b>
California	11,857	\$16,407,512	\$6,553,709	129,826
Washington	2,517	\$2,803,213	\$1,216,114	26,137
Colorado	2,707	\$2,587,527	\$1,079,308	23,939
Arizona	1,818	\$1,590,723	\$698,014	17,543
Idaho	461	\$1,307,492	\$486,128	10,225
Oregon	1,325	\$1,061,531	\$456,754	10,806
Nevada	681	\$937,594	\$382,812	8,395
Utah	825	\$739,183	\$307,486	8,211
New Mexico	705	\$668,982	\$283,147	7,147
Hawaii	498	\$426,024	\$168,162	3,735
Alaska	361	\$404,604	\$155,989	3,027
Montana	379	\$229,659	\$91,626	2,710
Wyoming	294	\$121,582	\$51,069	1,638
<b>Total Region</b>	<b>24,428</b>	<b>\$29,285,626</b>	<b>\$11,930,318</b>	<b>253,339</b>
<b>% of U.S.</b>	<b>26.35%</b>	<b>25.03%</b>	<b>25.41%</b>	<b>24.40%</b>

D = Disclosed Data

### Relocation/Expansion Decision Factors – Physical Infrastructure (Primary Data)

NAICS 5413 (n=48)	Not Important	Somewhat Important	Important	Very Important
Access within 30 minutes to an interstate hwy	35.42%	18.75%	20.83%	25.00%
Access to Package Freight Services	41.67%	6.25%	25.00%	27.08%
Immediate access to railhead or rail spur	97.92%	0.00%	0.00%	2.08%
Access within 30 minutes to rail freight	97.92%	0.00%	0.00%	2.08%
Access to passenger air service & direct flights	39.58%	22.92%	22.92%	14.58%
Access to port or harbor facilities	95.83%	2.08%	0.00%	2.08%
Access to supplies (one day)	25.00%	10.42%	39.58%	25.00%
Access to customers (one day)	22.92%	10.42%	35.42%	31.25%
Access to 3-phase electric power	56.25%	10.42%	16.67%	16.67%
Access to natural gas pipeline	75.00%	12.50%	4.17%	8.33%
Access to an international trade port	89.58%	6.25%	4.17%	0.00%
Access to fiber optic lines	33.33%	22.92%	33.33%	10.42%
Availability of high volume water supply	93.75%	4.17%	2.08%	0.00%
Availability of high volume wastewater disposal	91.67%	2.08%	6.25%	0.00%
Availability of solid waste disposal	77.08%	8.33%	12.50%	2.08%
Availability of satellite transmission	60.42%	16.67%	14.58%	8.33%
Availability of high speed internet access	6.25%	14.58%	18.75%	60.42%
Availability of public transportation	58.33%	22.92%	16.67%	2.08%
Access to ponds and streams	77.08%	10.42%	12.50%	0.00%
Possibility for future expansion at site	29.17%	35.42%	18.75%	16.67%

**Relocation/Expansion Decision Factors – Economic Infrastructure (Primary Data)**

NAICS 5413 (n=48)	Not Important	Somewhat Important	Important	Very Important
Availability of managerial workforce	33.33%	22.92%	31.25%	12.50%
Availability of a skilled workforce	14.58%	12.50%	37.50%	35.42%
Availability of technical workforce	12.50%	14.58%	37.50%	35.42%
Availability of unskilled workforce	62.50%	16.67%	14.58%	6.25%
Favorable local labor costs	18.75%	20.83%	37.50%	22.92%
Favorable workers compensation tax rate	12.50%	16.67%	43.75%	27.08%
Favorable local tax rate	10.42%	22.92%	33.33%	33.33%
Availability of job training programs	45.83%	29.17%	16.67%	8.33%
Availability of long and short term financing	33.33%	25.00%	22.92%	18.75%

**Relocation/Expansion Decision Factors – Quality of Life (Primary Data)**

NAICS 5413 (n=48)	Not Important	Somewhat Important	Important	Very Important
Low Crime Rate	6.25%	16.67%	35.42%	41.67%
Availability and affordability of housing	14.58%	12.50%	35.42%	37.50%
High environmental quality	8.33%	18.75%	39.58%	33.33%
Outdoor recreation opportunities	20.83%	22.92%	29.17%	27.08%
Social and cultural opportunities	22.92%	18.75%	31.25%	27.08%
Retail shopping opportunities	22.92%	31.25%	31.25%	14.58%
Quality of education system	10.42%	12.50%	31.25%	45.83%
Availability of local college or university	25.00%	18.75%	29.17%	27.08%
Availability of quality health care	8.33%	18.75%	33.33%	39.58%
Availability of fire protection	8.33%	12.50%	43.75%	35.42%
Ease of attracting skilled workers	12.50%	18.75%	35.42%	33.33%

**Relocation/Expansion Decision Factors – Sources Used to Find Locations Primary Data)**

NAICS 5413 (n=13)	Don't Use	Use a Little	Use	Use a Lot
Radio and television	38.46%	46.15%	7.69%	7.69%
Local newspaper	38.46%	46.15%	7.69%	7.69%
National newspaper	76.92%	23.08%	0.00%	0.00%
Regional trade publications	30.77%	30.77%	30.77%	7.69%
National trade publications	53.85%	23.08%	15.38%	7.69%
Local chamber of commerce	23.08%	7.69%	15.38%	53.85%
State chamber of commerce	38.46%	30.77%	23.08%	7.69%
Local economic development agencies	23.08%	7.69%	61.54%	7.69%
State economic development agencies	30.77%	30.77%	30.77%	7.69%
Real estate agent	23.08%	61.54%	15.38%	0.00%
Internet	7.69%	0.00%	23.08%	69.23%
Word of mouth	0.00%	30.77%	23.08%	46.15%
Vacation travel experience	15.38%	53.85%	23.08%	7.69%

**Miscellaneous Industry Information (Primary Data)**

NAICS 5413 (n=48)	Not Provided	Provided
Non managerial health insurance	33.33%	66.67%
Non managerial paid vacation	31.25%	68.75%
Non managerial job related training programs	33.33%	66.67%
Non managerial retirement plan with employer contributions	60.42%	39.58%
	Yes	No
Company relocated or expanded in the last 5 years	56.25%	43.75%

If a company (NAICS 5413) would relocate or expand to an additional location in the next 5 years, what is the best estimate of approximately how many total acres of property you would need? (n=48)

Less than 1 acre	50.00%
1 to 3 acres	22.92%
4 to 5 acres	16.67%
Over 5 acres	10.42%



If a company (NAICS 5413) would relocate or expand to an additional location in the next 5 years, what is the best estimate of the total amount of building space in square feet you would need? (Include exterior infrastructure areas like parking, loading docks and/or equipment storage) (n=13)

Less than 10,000 sq. ft.	30.77%
10,000 to 25,000 sq. ft.	46.15%
25,001 to 50,000 sq. ft.	7.69%
50,001 to 75,000 sq. ft.	15.38%
75,001 to 100,000 sq. ft.	0.00%
Over 100,000 sq. ft.	0.00%

If a company (NAICS 5413) would relocate or expand to an additional location in the next 5 years, what is the best estimate of annual sales or revenue at this location? (n=13)

Under \$1 million per year	38.46%
\$1 million to \$2 million per year	38.46%
Over \$2 million to \$3 million per year	23.08%
Over \$3 million to \$5 million per year	0.00%
Over \$5 million to \$10 million per year	0.00%
Over \$10 million per year	0.00%

## NAICS CODE 5414

### **5414 Specialized Design Services**

#### **54141 Interior Design Services**

#### **54142 Industrial Design Services**

#### **54143 Graphic Design Services**

#### **54149 Other Specialized Design Services**

**5414 Description:** This industry group comprises establishments providing specialized design services (except architectural, engineering, and computer systems design).

**54141 Description:** This industry comprises establishments primarily engaged in planning, designing, and administering projects in interior spaces to meet the physical and aesthetic needs of people using them, taking into consideration building codes, health and safety regulations, traffic patterns and floor planning, mechanical and electrical needs, and interior fittings and furniture. Interior designers and interior design consultants work in areas, such as hospitality design, health care design, institutional design, commercial and corporate design, and residential design. This industry also includes interior decorating consultants engaged exclusively in providing aesthetic services associated with interior spaces.

**54142 Description:** This industry comprises establishments primarily engaged in creating and developing designs and specifications that optimize the use, value, and appearance of their products. These services can include the determination of the materials, construction, mechanisms, shape, color, and surface finishes of the product, taking into consideration human characteristics and needs, safety, market appeal, and efficiency in production, distribution, use, and maintenance. Establishments providing automobile or furniture industrial design services or industrial design consulting services are included in this industry.

**54143 Description:** This industry comprises establishments primarily engaged in planning, designing, and managing the production of visual communication in order to convey specific messages or concepts, clarify complex information, or project visual identities. These services can include the design of printed materials, packaging, advertising, signage systems, and corporate identification (logos). This industry also includes commercial artists engaged exclusively in generating drawings and illustrations requiring technical accuracy or interpretative skills.

**54149 Description:** This industry comprises establishments primarily engaged in providing professional design services (except architectural, landscape architecture, engineering, interior, industrial, graphic, and computer system design).

## Economic Census Trends, 1997

<b>NAICS 5414</b>	<b>1997</b>
Number of Establishments	26,436
Receipts/Revenues (\$1,000)	\$14,254,024
Annual Payroll (\$1,000)	\$4,088,006
Employees	113,035
Average Payroll Per Job	\$36,165
Average Employment Per Establishment	4.28
Average Receipts/Revenue Per Establishment	\$539,189

<b>NAICS 54141</b>	<b>1997</b>
Number of Establishments	9,612
Receipts/Revenues (\$1,000)	\$4,945,340
Annual Payroll (\$1,000)	\$1,021,531
Employees	33,915
Average Payroll Per Job	\$30,120
Average Employment Per Establishment	3.53
Average Receipts/Revenue Per Establishment	\$514,496

<b>NAICS 54142</b>	<b>1997</b>
Number of Establishments	1,322
Receipts/Revenues (\$1,000)	\$1,363,017
Annual Payroll (\$1,000)	\$582,591
Employees	13,607
Average Payroll Per Job	\$42,815
Average Employment Per Establishment	10.29
Average Receipts/Revenue Per Establishment	\$1,031,026

<b>NAICS 54143</b>	<b>1997</b>
Number of Establishments	14,631
Receipts/Revenues (\$1,000)	\$7,554,903
Annual Payroll (\$1,000)	\$2,354,674
Employees	61,622
Average Payroll Per Job	\$38,211
Average Employment Per Establishment	4.21
Average Receipts/Revenue Per Establishment	\$516,362

<b>NAICS 54149</b>	<b>1997</b>
Number of Establishments	871
Receipts/Revenues (\$1,000)	\$390,764
Annual Payroll (\$1,000)	\$129,210
Employees	3,891
Average Payroll Per Job	\$33,207
Average Employment Per Establishment	4.47
Average Receipts/Revenue Per Establishment	\$448,638

Source: US Census Bureau

### Top 10 States (NAICS 5414) - 1997

	Establishments	Revenues (\$000)	Annual Payroll (\$1,000)	Paid Employees
<b>Total U.S.</b>	<b>26,436</b>	<b>\$14,254,024</b>	<b>\$4,088,006</b>	<b>113,035</b>
California	3,586	\$2,537,242	\$722,117	18,660
New York	2,958	\$2,155,804	\$627,288	13,575
Illinois	1,709	\$993,333	\$305,173	7,656
Florida	2,051	\$860,018	\$174,718	6,499
Texas	1,427	\$768,329	\$208,885	6,083
Ohio	970	\$573,621	\$198,016	5,749
Michigan	836	\$467,080	\$175,351	4,814
Pennsylvania	823	\$451,068	\$151,656	4,366
New Jersey	1,012	\$443,923	\$122,198	3,210
Georgia	850	\$439,732	\$115,810	3,215
<b>Total</b>	<b>16,222</b>	<b>\$9,690,150</b>	<b>\$2,801,212</b>	<b>73,827</b>
<b>% of U.S.</b>	<b>61.36%</b>	<b>67.98%</b>	<b>68.52%</b>	<b>65.31%</b>

### Western States (NAICS 5414) - 1997

	Establishments	Revenues (\$000)	Annual Payroll (\$1,000)	Paid Employees
<b>Total U.S.</b>	<b>26,436</b>	<b>\$14,254,024</b>	<b>\$4,088,006</b>	<b>113,035</b>
California	3,586	\$2,537,242	\$722,117	18,660
Colorado	603	\$241,835	\$57,498	1,879
Oregon	348	\$232,276	\$84,684	2,074
Washington	516	\$200,553	\$61,327	1,874
Arizona	423	\$197,126	\$47,084	1,463
Nevada	153	\$78,609	\$17,248	555
Utah	178	\$61,752	\$12,537	597
New Mexico	105	\$41,559	\$13,128	429
Hawaii	88	\$35,232	\$7,700	263
Idaho	83	\$30,399	\$5,306	242
Montana	52	\$12,057	\$2,326	162
Alaska	14	\$6,231	\$1,205	46
Wyoming	15	\$2,605	\$442	24
<b>Total Region</b>	<b>6,164</b>	<b>\$3,677,476</b>	<b>\$1,032,602</b>	<b>28,268</b>
<b>% of U.S.</b>	<b>23.32%</b>	<b>25.80%</b>	<b>25.26%</b>	<b>25.01%</b>

### Relocation/Expansion Decision Factors – Physical Infrastructure (Primary Data)

NAICS 5414 (n=37)	Not Important	Somewhat Important	Important	Very Important
Access within 30 minutes to an interstate hwy	13.51%	13.51%	29.73%	43.24%
Access to Package Freight Services	24.32%	13.51%	18.92%	43.24%
Immediate access to railhead or rail spur	86.49%	10.81%	2.70%	0.00%
Access within 30 minutes to rail freight	86.49%	10.81%	2.70%	0.00%
Access to passenger air service & direct flights	37.84%	18.92%	24.32%	18.92%
Access to port or harbor facilities	86.49%	8.11%	5.41%	0.00%
Access to supplies (one day)	10.81%	18.92%	29.73%	40.54%
Access to customers (one day)	16.22%	8.11%	32.43%	43.24%
Access to 3-phase electric power	62.16%	5.41%	5.41%	27.03%
Access to natural gas pipeline	81.08%	5.41%	8.11%	5.41%
Access to an international trade port	81.08%	10.81%	2.70%	5.41%
Access to fiber optic lines	35.14%	10.81%	29.73%	24.32%
Availability of high volume water supply	83.78%	8.11%	2.70%	5.41%
Availability of high volume wastewater disposal	97.30%	0.00%	2.70%	0.00%
Availability of solid waste disposal	86.11%	8.33%	5.56%	0.00%
Availability of satellite transmission	64.86%	16.22%	8.11%	10.81%
Availability of high speed internet access	0.00%	8.11%	8.11%	83.78%
Availability of public transportation	45.95%	24.32%	16.22%	13.51%
Access to ponds and streams	89.19%	5.41%	2.70%	2.70%
Possibility for future expansion at site	27.03%	27.03%	21.62%	24.32%

### Relocation/Expansion Decision Factors – Economic Infrastructure

NAICS 5414 (n=37)	Not Important	Somewhat Important	Important	Very Important
Availability of managerial workforce	29.73%	21.62%	27.03%	21.62%
Availability of a skilled workforce	16.22%	18.92%	35.14%	29.73%
Availability of technical workforce	21.62%	16.22%	37.84%	24.32%
Availability of unskilled workforce	70.27%	16.22%	10.81%	2.70%
Favorable local labor costs	21.62%	16.22%	37.84%	24.32%
Favorable workers compensation tax rate	21.62%	10.81%	40.54%	27.03%
Favorable local tax rate	13.51%	10.81%	45.95%	29.73%
Availability of job training programs	59.46%	16.22%	16.22%	8.11%
Availability of long and short term financing	32.43%	24.32%	24.32%	18.92%

### Relocation/Expansion Decision Factors – Quality of Life

NAICS 5414 (n=37)	Not Important	Somewhat Important	Important	Very Important
Low Crime Rate	0.00%	8.11%	35.14%	56.76%
Availability and affordability of housing	16.22%	16.22%	35.14%	32.43%
High environmental quality	5.41%	21.62%	37.84%	35.14%
Outdoor recreation opportunities	18.92%	10.81%	35.14%	35.14%
Social and cultural opportunities	5.41%	13.51%	45.95%	35.14%
Retail shopping opportunities	8.11%	29.73%	43.24%	18.92%
Quality of education system	10.81%	5.41%	32.43%	51.35%
Availability of local college or university	18.92%	21.62%	35.14%	24.32%
Availability of quality health care	2.70%	8.11%	29.73%	59.46%
Availability of fire protection	5.41%	16.22%	32.43%	45.95%
Ease of attracting skilled workers	10.81%	13.51%	51.35%	24.32%

### Relocation/Expansion Decision Factors – Sources Used to Find Locations

NAICS 5414 (n=11)	Don't Use	Use a Little	Use	Use a Lot
Radio and television	63.64%	27.27%	9.09%	0.00%
Local newspaper	45.45%	9.09%	36.36%	9.09%
National newspaper	54.55%	27.27%	18.18%	0.00%
Regional trade publications	36.36%	18.18%	27.27%	18.18%
National trade publications	27.27%	9.09%	45.45%	18.18%
Local chamber of commerce	45.45%	18.18%	18.18%	18.18%
State chamber of commerce	63.64%	9.09%	18.18%	9.09%
Local economic development agencies	45.45%	27.27%	9.09%	18.18%
State economic development agencies	54.55%	18.18%	9.09%	18.18%
Real estate agent	0.00%	18.18%	36.36%	45.45%
Internet	9.09%	0.00%	27.27%	63.64%
Word of mouth	0.00%	0.00%	36.36%	63.64%
Vacation travel experience	45.45%	9.09%	36.36%	9.09%

### Miscellaneous Industry Information

NAICS 5414 (n=37)	Not Provided	Provided
Non managerial health insurance	41.67%	58.33%
Non managerial paid vacation	27.78%	72.22%
Non managerial job related training programs	36.11%	63.89%
Non managerial retirement plan with employer contributions	52.78%	47.22%
	Yes	No
Company relocated or expanded in the last 5 years	44.44%	55.56%

If a company (NAICS 5414) would relocate or expand to an additional location in the next 5 years, what is the best estimate of approximately how many total acres of property you would need? (n=37)

Less than 1 acre	32.43%
1 to 3 acres	37.84%
4 to 5 acres	16.22%
Over 5 acres	13.15%

If a company (NAICS 5414) would relocate or expand to an additional location in the next 5 years, what is the best estimate of the total amount of building space in square feet you would need? (Include exterior infrastructure areas like parking, loading docks and/or equipment storage) (n=11)

Less than 10,000 sq. ft.	50.00%
10,000 to 25,000 sq. ft.	50.00%
25,001 to 50,000 sq. ft.	0.00%
50,001 to 75,000 sq. ft.	0.00%
75,001 to 100,000 sq. ft.	0.00%
Over 100,000 sq. ft.	0.00%

If a company (NAICS 5414) would relocate or expand to an additional location in the next 5 years, what is the best estimate of annual sales or revenue at this location? (n=11)

Under \$1 million per year	50.00%
\$1 million to \$2 million per year	30.00%
Over \$2 million to \$3 million per year	10.00%
Over \$3 million to \$5 million per year	10.00%
Over \$5 million to \$10 million per year	0.00%
Over \$10 million per year	0.00%
Don't know	0.00%



## NAICS CODE 5415

### 5415 Computer Systems Design & Related Services

**5415 Description:** This industry comprises establishments primarily engaged in providing expertise in the field of information technologies through one or more of the following activities: (1) writing, modifying, testing, and supporting software to meet the needs of a particular customer; (2) planning and designing computer systems that integrate computer hardware, software, and communication technologies; (3) on-site management and operation of clients' computer systems and/or data processing facilities; and (4) other professional and technical computer-related advice and services.

#### Economic Census Trends – Employer Only, 2002

NAICS 5415	2002
Number of Establishments	105,710
Receipts/Revenues (\$1,000)	173,414,189
Annual Payroll (\$1,000)	72,368,242
Employees	1,107,241
Average Payroll Per Job	\$65,359
Average Employment Per Establishment	10.47
Average Receipts/Revenue Per Establishment	\$1,640,471

Source: US Census Bureau

**Top 10 States (NAICS 5415) - Employer Only, 2002**

	Establishments	Revenues (\$000)	Annual Payroll (\$1,000)	Paid Employees
<b>Total U.S.</b>	<b>105,710</b>	<b>\$173,414,189</b>	<b>\$72,368,242</b>	<b>1,107,241</b>
California	15,166	\$29,449,422	\$12,801,250	158,820
Virginia	4,911	\$16,125,656	\$6,738,620	100,691
Texas	6,550	\$10,968,161	\$4,512,363	70,596
New York	7,876	\$10,200,401	\$4,244,198	61,015
New Jersey	8,061	\$9,801,670	\$4,200,134	62,428
Massachusetts	3,693	\$8,739,667	\$3,754,454	50,199
Maryland	3,335	\$8,499,036	\$3,112,713	49,560
Pennsylvania	3,755	\$7,839,307	\$3,191,472	47,363
Florida	5,971	\$7,621,478	\$2,854,747	49,094
Illinois	5,987	\$6,764,600	\$2,987,268	46,095
<b>Total</b>	<b>65,305</b>	<b>\$116,009,398</b>	<b>\$48,397,219</b>	<b>695,861</b>
<b>% of U.S.</b>	<b>61.78%</b>	<b>66.90%</b>	<b>66.88%</b>	<b>62.85%</b>

**Western States (NAICS 5415) - Employer Only, 2002**

	Establishments	Revenues (\$000)	Annual Payroll (\$1,000)	Paid Employees
<b>Total U.S.</b>	<b>105,710</b>	<b>\$173,414,189</b>	<b>\$72,368,242</b>	<b>1,107,241</b>
California	15,166	\$29,449,422	\$12,801,250	158,820
Colorado	3,094	\$5,874,770	\$2,365,204	37,357
Arizona	1,553	\$2,733,650	\$1,128,985	18,069
Washington	2,129	\$2,671,160	\$1,377,611	21,193
Utah	861	\$1,071,369	\$475,344	8,202
Oregon	1,157	\$949,692	\$506,760	9,831
Nevada	730	\$626,194	\$198,473	3,378
New Mexico	401	\$368,072	\$149,584	3,650
Hawaii	252	\$266,899	\$93,844	1,894
Idaho	275	\$192,278	\$81,830	1,664
Montana	223	\$113,130	\$52,058	1,750
Alaska	96	\$101,196	\$61,416	1,202
Wyoming	93	\$41,740	\$11,564	586
<b>Total Region</b>	<b>26,030</b>	<b>\$44,459,572</b>	<b>\$19,303,923</b>	<b>267,596</b>
<b>% of U.S.</b>	<b>24.62%</b>	<b>25.64%</b>	<b>26.67%</b>	<b>24.17%</b>

D = Disclosed Data

**Relocation/Expansion Decision Factors – Physical Infrastructure (Primary Data)**

NAICS 5415 (n=40)	Not Important	Somewhat Important	Important	Very Important
Access within 30 minutes to an interstate hwy	20.00%	22.50%	22.50%	35.00%
Access to Package Freight Services	47.50%	15.00%	22.50%	15.00%
Immediate access to railhead or rail spur	95.00%	0.00%	2.50%	2.50%
Access within 30 minutes to rail freight	97.50%	0.00%	0.00%	2.50%
Access to passenger air service & direct flights	17.50%	27.50%	22.50%	32.50%
Access to port or harbor facilities	97.50%	2.50%	0.00%	0.00%
Access to supplies (one day)	50.00%	7.50%	22.50%	20.00%
Access to customers (one day)	22.50%	12.50%	27.50%	37.50%
Access to 3-phase electric power	47.50%	7.50%	22.50%	22.50%
Access to natural gas pipeline	87.50%	2.50%	5.00%	5.00%
Access to an international trade port	97.50%	2.50%	0.00%	0.00%
Access to fiber optic lines	20.00%	12.50%	27.50%	40.00%
Availability of high volume water supply	87.50%	7.50%	2.50%	2.50%
Availability of high volume wastewater disposal	97.50%	0.00%	2.50%	0.00%
Availability of solid waste disposal	87.50%	5.00%	7.50%	0.00%
Availability of satellite transmission	62.50%	12.50%	15.00%	10.00%
Availability of high speed internet access	0.00%	0.00%	15.00%	85.00%
Availability of public transportation	45.00%	15.00%	27.50%	12.50%
Access to ponds and streams	85.00%	5.00%	7.50%	2.50%
Possibility for future expansion at site	30.00%	27.50%	37.50%	5.00%

**Relocation/Expansion Decision Factors – Economic Infrastructure (Primary Data)**

NAICS 5415 (n=40)	Not Important	Somewhat Important	Important	Very Important
Availability of managerial workforce	17.50%	20.00%	35.00%	27.50%
Availability of a skilled workforce	7.50%	10.00%	27.50%	55.00%
Availability of technical workforce	5.00%	2.50%	22.50%	70.00%
Availability of unskilled workforce	85.00%	5.00%	7.50%	2.50%
Favorable local labor costs	25.00%	37.50%	25.00%	12.50%
Favorable workers compensation tax rate	15.00%	30.00%	30.00%	25.00%
Favorable local tax rate	12.50%	25.00%	32.50%	30.00%
Availability of job training programs	60.00%	12.50%	10.00%	17.50%
Availability of long and short term financing	37.50%	20.00%	25.00%	17.50%

**Relocation/Expansion Decision Factors – Quality of Life (Primary Data)**

NAICS 5415 (n=40)	Not Important	Somewhat Important	Important	Very Important
Low Crime Rate	5.00%	15.00%	35.00%	45.00%
Availability and affordability of housing	10.00%	25.00%	27.50%	37.50%
High environmental quality	7.50%	20.00%	30.00%	42.50%
Outdoor recreation opportunities	15.00%	20.00%	40.00%	25.00%
Social and cultural opportunities	15.00%	17.50%	37.50%	30.00%
Retail shopping opportunities	22.50%	35.00%	30.00%	12.50%
Quality of education system	7.50%	10.00%	35.00%	47.50%
Availability of local college or university	7.50%	25.00%	27.50%	40.00%
Availability of quality health care	5.00%	10.00%	30.00%	55.00%
Availability of fire protection	5.00%	22.50%	32.50%	40.00%
Ease of attracting skilled workers	5.00%	7.50%	37.50%	50.00%

**Relocation/Expansion Decision Factors – Sources Used to Find Locations Primary Data)**

NAICS 5415 (n=16)	Don't Use	Use a Little	Use	Use a Lot
Radio and television	81.25%	6.25%	12.50%	0.00%
Local newspaper	50.00%	25.00%	12.50%	12.50%
National newspaper	56.25%	31.25%	12.50%	0.00%
Regional trade publications	25.00%	31.25%	37.50%	6.25%
National trade publications	31.25%	37.50%	25.00%	6.25%
Local chamber of commerce	25.00%	43.75%	31.25%	0.00%
State chamber of commerce	43.75%	37.50%	18.75%	0.00%
Local economic development agencies	68.75%	6.25%	6.25%	18.75%
State economic development agencies	68.75%	12.50%	12.50%	6.25%
Real estate agent	37.50%	18.75%	18.75%	25.00%
Internet	6.25%	6.25%	0.00%	87.50%
Word of mouth	12.50%	12.50%	18.75%	56.25%
Vacation travel experience	50.00%	31.25%	12.50%	6.25%

**Miscellaneous Industry Information (Primary Data)**

NAICS 5415 (n=40)	Not Provided	Provided
Non managerial health insurance	25.00%	75.00%
Non managerial paid vacation	15.00%	85.00%
Non managerial job related training programs	12.50%	87.50%
Non managerial retirement plan with employer contributions	57.50%	42.50%
	Yes	No
Company relocated or expanded in the last 5 years	62.50%	37.50%

If a company (NAICS 5415) would relocate or expand to an additional location in the next 5 years, what is the best estimate of approximately how many total acres of property you would need? (n=40)

Less than 1 acre	35.00%
1 to 3 acres	25.00%
4 to 5 acres	15.00%
Over 5 acres	25.00%

If a company (NAICS 5415) would relocate or expand to an additional location in the next 5 years, what is the best estimate of the total amount of building space in square feet you would need? (Include exterior infrastructure areas like parking, loading docks and/or equipment storage) (n=16)

Less than 10,000 sq. ft.	75.00%
10,000 to 25,000 sq. ft.	25.00%
25,001 to 50,000 sq. ft.	0.00%
50,001 to 75,000 sq. ft.	0.00%
75,001 to 100,000 sq. ft.	0.00%
Over 100,000 sq. ft.	0.00%

If a company (NAICS 5415) would relocate or expand to an additional location in the next 5 years, what is the best estimate of annual sales or revenue at this location? (n=16)

Under \$1 million per year	37.50%
\$1 million to \$2 million per year	50.00%
Over \$2 million to \$3 million per year	6.25%
Over \$3 million to \$5 million per year	0.00%
Over \$5 million to \$10 million per year	0.00%
Over \$10 million per year	0.00%

## NAICS CODE 5416

### **5416 Management, Scientific, and Technical Consulting Services**

#### **54161 Management Consulting Service**

#### **54162 Environmental Consulting Service**

#### **54169 Other Scientific and Technical Consulting Services**

**5416 Description:** This industry comprises establishments primarily engaged in providing advice and assistance to businesses and other organizations on management issues, such as strategic and organizational planning; financial planning and budgeting; marketing objectives and policies; human resource policies, practices and planning; production scheduling; and control planning

**54162 Description:** This industry comprises establishments primarily engaged in providing advice and assistance to businesses and other organizations on environmental issues, such as the control of environmental contamination from pollutants, toxic substances, and hazardous materials. These establishments identify problems (e.g. inspect buildings for hazardous materials) measure and evaluate risks, and recommend solutions. They employ a multidiscipline staff of scientists, engineers, and other technicians with expertise in areas such as air and water quality, asbestos contamination, remediation, and environmental law. Establishments providing sanitation or site remediation consulting, services are included in this industry.

**54169 Description:** This industry comprises establishments primarily engaged in providing advice and assistance to businesses and other organizations on scientific and technical issues (except environmental). Examples include: agricultural consulting services, radio consulting services, motion picture consulting services, economic consulting services, biological consulting services, physics consulting services, chemical consulting services, safety consulting services, energy consulting services, and security consulting services.

## Economic Census Trends, 1997

<b>NAICS 5416</b>	<b>1997</b>
Number of Establishments	80,426
Receipts/Revenues (\$1,000)	\$63,428,740
Annual Payroll (\$1,000)	\$26,581,677
Employees	511,252
Average Payroll Per Job	\$51,993
Average Employment Per Establishment	6.36
Average Receipts/Revenue Per Establishment	\$788,660

<b>NAICS 54161</b>	<b>1997</b>
Number of Establishments	60,794
Receipts/Revenues (\$1,000)	\$52,224,697
Annual Payroll (\$1,000)	\$22,296,821
Employees	411,044
Average Payroll Per Job	\$54,244
Average Employment Per Establishment	6.76
Average Receipts/Revenue Per Establishment	\$859,044

<b>NAICS 54162</b>	<b>1997</b>
Number of Establishments	6,725
Receipts/Revenues (\$1,000)	\$4,780,771
Annual Payroll (\$1,000)	\$1,777,594
Employees	46,145
Average Payroll Per Job	\$38,522
Average Employment Per Establishment	6.86
Average Receipts/Revenue Per Establishment	\$710,895

<b>NAICS 54169</b>	<b>1997</b>
Number of Establishments	12,907
Receipts/Revenues (\$1,000)	\$6,423,272
Annual Payroll (\$1,000)	\$2,507,262
Employees	54,063
Average Payroll Per Job	\$46,377
Average Employment Per Establishment	4.19
Average Receipts/Revenue Per Establishment	\$497,658

Source: US Census Bureau

**Top 10 States (NAICS 5416) - 1997**

	Establishments	Revenues (\$000)	Annual Payroll (\$1,000)	Paid Employees
<b>Total U.S.</b>	<b>80,426</b>	<b>\$63,428,740</b>	<b>\$26,581,677</b>	<b>511,252</b>
California	9,596	\$8,219,392	\$3,330,783	61,974
New York	5,957	\$6,501,705	\$2,848,328	40,212
Illinois	4,700	\$5,090,553	\$2,430,428	42,490
Texas	5,228	\$4,442,596	\$1,867,420	35,123
Massachusetts	2,719	\$3,621,813	\$1,696,359	23,426
Pennsylvania	3,172	\$3,157,443	\$1,267,118	25,336
New Jersey	3,592	\$3,142,450	\$1,232,172	24,178
Florida	5,908	\$3,102,700	\$1,264,445	28,231
Virginia	2,847	\$2,501,345	\$1,162,809	24,800
Georgia	2,633	\$2,099,205	\$914,955	16,226
<b>Total</b>	<b>46,352</b>	<b>\$41,879,202</b>	<b>\$18,041,817</b>	<b>321,996</b>
<b>% of U.S.</b>	<b>57.63%</b>	<b>66.03%</b>	<b>67.77%</b>	<b>62.98%</b>

**Western States (NAICS 5416) - 1997**

	Establishments	Revenues (\$000)	Annual Payroll (\$1,000)	Paid Employees
<b>Total U.S.</b>	<b>80,426</b>	<b>\$63,428,740</b>	<b>\$26,581,677</b>	<b>511,252</b>
California	9,596	\$8,219,392	\$3,330,783	61,974
Colorado	2,087	\$1,104,113	\$465,653	9,679
Washington	1,820	\$917,169	\$380,820	7,972
Arizona	1,549	\$790,312	\$303,024	7,938
Oregon	961	\$379,587	\$147,566	3,586
Nevada	678	\$341,566	\$109,742	2,954
Utah	594	\$309,139	\$124,730	3,041
New Mexico	394	\$173,886	\$72,327	1,907
Hawaii	240	\$97,727	\$32,117	980
Alaska	143	\$85,324	\$29,907	538
Idaho	240	\$74,666	\$28,415	880
Montana	242	\$59,969	\$20,362	725
Wyoming	136	\$36,764	\$12,551	333
<b>Total Region</b>	<b>18,680</b>	<b>\$12,598,614</b>	<b>\$5,057,997</b>	<b>102,507</b>
<b>% of U.S.</b>	<b>23.33%</b>	<b>19.85%</b>	<b>19.03%</b>	<b>20.05%</b>



**Relocation/Expansion Decision Factors – Physical Infrastructure (Primary Data)**

NAICS 5416 (n=41)	Not Important	Somewhat Important	Important	Very Important
Access within 30 minutes to an interstate hwy	36.59%	14.63%	19.51%	29.27%
Access to Package Freight Services	36.59%	19.51%	14.63%	29.27%
Immediate access to railhead or rail spur	92.50%	2.50%	5.00%	0.00%
Access within 30 minutes to rail freight	92.68%	2.44%	4.88%	0.00%
Access to passenger air service & direct flights	29.27%	17.07%	17.07%	36.59%
Access to port or harbor facilities	92.68%	2.44%	4.88%	0.00%
Access to supplies (one day)	21.95%	12.20%	29.27%	36.59%
Access to customers (one day)	30.77%	2.56%	23.08%	43.59%
Access to 3-phase electric power	51.22%	12.20%	17.07%	19.51%
Access to natural gas pipeline	73.17%	14.63%	2.44%	9.76%
Access to an international trade port	87.80%	4.88%	7.32%	0.00%
Access to fiber optic lines	31.71%	21.95%	14.63%	31.71%
Availability of high volume water supply	70.73%	21.20%	9.76%	7.32%
Availability of high volume wastewater disposal	82.93%	7.32%	7.32%	2.44%
Availability of solid waste disposal	75.61%	9.76%	9.76%	4.88%
Availability of satellite transmission	53.66%	14.63%	19.51%	12.20%
Availability of high speed internet access	2.44%	7.32%	12.20%	78.05%
Availability of public transportation	46.34%	12.20%	29.27%	12.20%
Access to ponds and streams	87.80%	7.32%	0.00%	4.88%
Possibility for future expansion at site	26.83%	26.83%	31.71%	14.63%

**Relocation/Expansion Decision Factors – Economic Infrastructure (Primary Data)**

NAICS 5416 (n=41)	Not Important	Somewhat Important	Important	Very Important
Availability of managerial workforce	24.39%	29.27%	36.59%	9.76%
Availability of a skilled workforce	12.20%	17.07%	41.46%	29.27%
Availability of technical workforce	17.07%	17.07%	36.59%	29.27%
Availability of unskilled workforce	78.05%	14.63%	7.32%	0.00%
Favorable local labor costs	22.50%	17.50%	42.50%	17.50%
Favorable workers compensation tax rate	24.39%	24.39%	29.27%	21.95%
Favorable local tax rate	9.76%	19.51%	48.78%	21.95%
Availability of job training programs	51.22%	21.95%	19.51%	7.32%
Availability of long and short term financing	34.15%	29.27%	26.83%	9.76%

**Relocation/Expansion Decision Factors – Quality of Life (Primary Data)**

NAICS 5416 (n=41)	Not Important	Somewhat Important	Important	Very Important
Low Crime Rate	4.88%	9.76%	46.34%	39.02%
Availability and affordability of housing	12.20%	9.76%	43.90%	34.15%
High environmental quality	7.32%	14.63%	46.34%	31.71%
Outdoor recreation opportunities	20.00%	17.50%	40.00%	22.50%
Social and cultural opportunities	12.20%	26.83%	39.02%	21.95%
Retail shopping opportunities	21.95%	31.71%	36.59%	9.76%
Quality of education system	12.20%	7.32%	26.83%	53.66%
Availability of local college or university	19.51%	21.95%	39.02%	19.51%
Availability of quality health care	4.88%	7.32%	48.78%	39.02%
Availability of fire protection	7.32%	14.63%	43.90%	34.15%
Ease of attracting skilled workers	12.20%	17.07%	46.34%	21.39%

**Relocation/Expansion Decision Factors – Sources Used to Find Locations (Primary Data)**

NAICS 5416 (n=16)	Don't Use	Use a Little	Use	Use a Lot
Radio and television	68.75%	25.00%	6.25%	0.00%
Local newspaper	18.75%	50.00%	12.50%	18.75%
National newspaper	50.00%	18.75%	18.75%	12.50%
Regional trade publications	31.25%	50.00%	12.50%	6.25%
National trade publications	43.75%	37.50%	6.25%	12.50%
Local chamber of commerce	12.50%	37.50%	31.25%	18.75%
State chamber of commerce	62.50%	12.50%	18.75%	6.25%
Local economic development agencies	37.50%	18.75%	25.00%	18.75%
State economic development agencies	50.00%	25.00%	18.75%	6.25%
Real estate agent	31.25%	12.50%	25.00%	31.25%
Internet	6.25%	6.25%	12.50%	75.00%
Word of mouth	0.00%	31.25%	37.50%	31.25%
Vacation travel experience	37.50%	25.00%	18.75%	18.75%

**Miscellaneous Industry Information (Primary Data)**

NAICS 5416 (n=41)	Not Provided	Provided
Non managerial health insurance	29.27%	70.37%
Non managerial paid vacation	17.07%	82.93%
Non managerial job related training programs	12.20%	87.80%
Non managerial retirement plan with employer contributions	51.22%	48.78%
	Yes	No
Company relocated or expanded in the last 5 years	51.22	48.78

If a company (NAICS 5416) would relocate or expand to an additional location in the next 5 years, what is the best estimate of approximately how many total acres of property you would need? (n=41)

Less than 1 acre	81.25%
1 to 3 acres	6.25%
4 to 5 acres	6.25%
Over 5 acres	6.25%

If a company (NAICS 5416) would relocate or expand to an additional location in the next 5 years, what is the best estimate of the total amount of building space in square feet you would need? (Include exterior infrastructure areas like parking, loading docks and/or equipment storage) (n=16)

Less than 10,000 sq. ft.	62.50%
10,000 to 25,000 sq. ft.	31.25%
25,001 to 50,000 sq. ft.	0.00%
50,001 to 75,000 sq. ft.	0.00%
75,001 to 100,000 sq. ft.	0.00%
Over 100,000 sq. ft.	6.25%

If a company (NAICS 5416) would relocate or expand to an additional location in the next 5 years, what is the best estimate of annual sales or revenue at this location? (n=16)

Under \$1 million per year	25.00%
\$1 million to \$2 million per year	31.25%
Over \$2 million to \$3 million per year	0.00%
Over \$3 million to \$5 million per year	25.00%
Over \$5 million to \$10 million per year	6.25%
Over \$10 million per year	6.25%
Don't know	6.25%

## NAICS CODE 5417

### 5417 Scientific Research & Development Services

#### 54171 Research & Development in the Physical Engineering & Life Sciences

#### 54172 Research & Development in the Social Sciences & Humanities

**5417 Description:** This industry group comprises establishments engaged in conducting original investigation undertaken on a systematic basis to gain new knowledge (research) and/or the application of research findings or other scientific knowledge for the creation of new or significantly improved products or processes (experimental development). The industries within this industry group are defined on the basis of the domain of research; that is, on the scientific expertise of the establishment.

**54171 Description:** This industry comprises establishments primarily engaged in conducting research and experimental development in the physical, engineering, or life sciences, such as agriculture, electronics, environmental, biology, botany, biotechnology, computers, chemistry, food, fisheries, forests, geology, health, mathematics, medicine, oceanography, pharmacy, physics, veterinary, and other allied subjects.

**54172 Description:** This industry comprises establishments primarily engaged in conducting research and analyses in cognitive development, sociology, psychology, language, behavior, economic, and other social science and humanities research.

### Economic Census Trends – Employer Only, 2002

NAICS 5417	2002
Number of Establishments	15,334
Receipts/Revenues (\$1,000)	\$64,481,193
Annual Payroll (\$1,000)	\$43,525,771
Employees	618,088
Average Payroll Per Job	\$70,420
Average Employment Per Establishment	40.31
Average Receipts/Revenue Per Establishment	\$4,205,112

<b>NAICS 54171</b>	<b>2002</b>
Number of Establishments	13,133
Receipts/Revenues (\$1,000)	\$60,453,069
Annual Payroll (\$1,000)	\$39,816,204
Employees	557,417
Average Payroll Per Job	\$71,429
Average Employment Per Establishment	42.44
Average Receipts/Revenue Per Establishment	\$4,603,142

<b>NAICS 54172</b>	<b>2002</b>
Number of Establishments	2,201
Receipts/Revenues (\$1,000)	\$4,028,124
Annual Payroll (\$1,000)	\$3,709,567
Employees	60,671
Average Payroll Per Job	\$61,142
Average Employment Per Establishment	27.57
Average Receipts/Revenue Per Establishment	\$1,830,133

Source: US Census Bureau

### **Top 10 States (NAICS 5417) – Employer Only, 2002**

	Establishments	Revenues (\$000)	Annual Payroll (\$1,000)	Paid Employees
<b>Total U.S.</b>	<b>15,334</b>	<b>\$64,481,193</b>	<b>\$43,525,771</b>	<b>618,088</b>
California	3,037	\$14,925,414	\$8,517,543	105,670
Massachusetts	904	\$5,031,210	\$2,639,022	34,562
Virginia	625	\$4,728,376	\$2,145,696	30,418
New York	864	\$4,355,872	\$2,754,504	51,484
Maryland	663	\$4,242,754	\$1,814,904	26,485
Texas	750	\$3,050,532	\$2,410,945	38,044
Pennsylvania	571	\$2,709,838	\$2,559,177	33,928
North Carolina	451	\$2,131,675	\$1,247,072	17,519
New Jersey	591	\$2,017,238	\$2,815,922	35,105
District of Columbia	302	\$2,001,422	\$645,475	10,046
<b>Total</b>	<b>8,456</b>	<b>\$43,192,909</b>	<b>\$26,904,785</b>	<b>373,215</b>
<b>% of U.S.</b>	<b>55.15%</b>	<b>66.99%</b>	<b>61.81%</b>	<b>60.38%</b>

**Western States (NAICS 5417) – Employer Only, 2002**

	Establishments	Revenues (\$000)	Annual Payroll (\$1,000)	Paid Employees
<b>Total U.S.</b>	<b>15,334</b>	<b>\$64,481,193</b>	<b>\$43,525,771</b>	<b>618,088</b>
California	3,037	\$14,925,414	\$8,517,543	105,670
Washington	391	\$1,970,370	\$1,231,857	17,362
Colorado	420	\$1,512,912	\$794,682	12,001
New Mexico	189	\$566,014	\$227,682	4,052
Nevada	88	\$366,013	\$133,393	1,922
Oregon	216	\$344,615	\$787,566	10,612
Utah	159	\$297,979	\$149,376	2,809
Hawaii	70	\$163,222	\$59,807	1,348
Idaho	55	\$121,114	\$61,356	1,179
Montana	78	\$72,820	\$33,339	783
Alaska	56	\$71,336	\$27,015	744
Wyoming	31	\$17,150	\$6,157	184
Arizona	241	D	D	2500-4999
<b>Total Region</b>	<b>5,031</b>	<b>\$20,428,959*</b>	<b>\$12,029,773*</b>	<b>158,666*</b>
<b>% of U.S.</b>	<b>32.81%</b>	<b>31.68%</b>	<b>27.64%</b>	<b>25.67%</b>

D = Disclosed Data

\* Does not include all data

**Relocation/Expansion Decision Factors – Physical Infrastructure (Primary Data)**

NAICS 5417 (n=46)	Not Important	Somewhat Important	Important	Very Important
Access within 30 minutes to an interstate hwy	21.74%	17.39%	26.09%	34.78%
Access to Package Freight Services	19.57%	10.87%	26.09%	43.48%
Immediate access to railhead or rail spur	93.33%	2.22%	2.22%	2.22%
Access within 30 minutes to rail freight	91.30%	6.52%	0.00%	2.17%
Access to passenger air service & direct flights	15.22%	15.22%	26.09%	43.48%
Access to port or harbor facilities	86.96%	8.70%	4.35%	0.00%
Access to supplies (one day)	28.26%	21.74%	23.91%	26.09%
Access to customers (one day)	34.78%	13.04%	15.22%	36.96%
Access to 3-phase electric power	39.13%	2.17%	26.09%	32.61%
Access to natural gas pipeline	63.04%	13.04%	13.04%	10.87%
Access to an international trade port	80.43%	13.04%	6.52%	0.00%
Access to fiber optic lines	43.48%	13.04%	17.39%	26.09%
Availability of high volume water supply	78.26%	4.35%	15.22%	2.17%
Availability of high volume wastewater disposal	80.43%	10.87%	8.70%	0.00%
Availability of solid waste disposal	60.87%	21.74%	15.22%	2.17%
Availability of satellite transmission	69.57%	13.04%	10.87%	6.52%
Availability of high speed internet access	6.52%	4.35%	15.22%	73.91%
Availability of public transportation	47.83%	17.39%	21.74%	13.04%
Access to ponds and streams	82.61%	6.52%	6.52%	4.35%
Possibility for future expansion at site	19.57%	30.43%	30.43%	19.57%

**Relocation/Expansion Decision Factors – Economic Infrastructure (Primary Data)**

NAICS 5417 (n=46)	Not Important	Somewhat Important	Important	Very Important
Availability of managerial workforce	23.91%	17.39%	28.26%	30.43%
Availability of a skilled workforce	22.22%	4.44%	26.67%	46.67%
Availability of technical workforce	13.04%	13.04%	28.26%	45.65%
Availability of unskilled workforce	56.52%	30.43%	6.52%	6.52%
Favorable local labor costs	23.91%	17.39%	32.61%	26.09%
Favorable workers compensation tax rate	15.22%	23.91%	32.61%	28.26%
Favorable local tax rate	10.87%	19.57%	39.13%	30.43%
Availability of job training programs	39.13%	23.91%	23.91%	13.04%
Availability of long and short term financing	28.26%	17.39%	30.43%	23.91%

**Relocation/Expansion Decision Factors – Quality of Life (Primary Data)**

NAICS 5417 (n=46)	Not Important	Somewhat Important	Important	Very Important
Low Crime Rate	4.35%	23.91%	30.43%	41.30%
Availability and affordability of housing	2.17%	13.04%	45.65%	39.13%
High environmental quality	6.52%	23.91%	34.78%	34.78%
Outdoor recreation opportunities	15.22%	30.43%	34.78%	19.57%
Social and cultural opportunities	10.87%	28.26%	50.00%	10.87%
Retail shopping opportunities	23.91%	36.96%	34.78%	4.35%
Quality of education system	4.35%	6.52%	30.43%	58.70%
Availability of local college or university	15.22%	10.87%	32.61%	41.30%
Availability of quality health care	4.35%	2.17%	28.26%	65.22%
Availability of fire protection	2.17%	17.39%	43.48%	36.96%
Ease of attracting skilled workers	13.04%	10.87%	28.26%	47.83%

**Relocation/Expansion Decision Factors – Sources Used to Find Locations Primary Data)**

NAICS 5417 (n=15)	Don't Use	Use a Little	Use	Use a Lot
Radio and television	73.33%	20.00%	6.67%	0.00%
Local newspaper	40.00%	33.33%	6.67%	20.00%
National newspaper	60.00%	26.67%	6.67%	6.67%
Regional trade publications	46.67%	20.00%	13.33%	20.00%
National trade publications	53.33%	13.33%	26.67%	6.67%
Local chamber of commerce	33.33%	20.00%	20.00%	26.67%
State chamber of commerce	53.33%	20.00%	13.33%	13.33%
Local economic development agencies	46.67%	20.00%	20.00%	13.33%
State economic development agencies	26.67%	33.33%	33.33%	6.67%
Real estate agent	33.33%	26.67%	26.67%	13.33%
Internet	0.00%	6.67%	26.67%	66.67%
Word of mouth	20.00%	6.67%	26.67%	46.67%
Vacation travel experience	60.00%	33.33%	6.67%	0.00%



**Miscellaneous Industry Information (Primary Data)**

NAICS 5417 (n=46)	Not Provided	Provided
Non managerial health insurance	8.70%	91.30%
Non managerial paid vacation	6.52%	93.48%
Non managerial job related training programs	17.39%	82.61%
Non managerial retirement plan with employer contributions	40.00%	60.00%
	Yes	No
Company relocated or expanded in the last 5 years	65.22%	34.78%

If a company (NAICS 5417) would relocate or expand to an additional location in the next 5 years, what is the best estimate of approximately how many total acres of property you would need? (n=46)

Less than 1 acre	41.30%
1 to 3 acres	26.09%
4 to 5 acres	15.22%
Over 5 acres	17.39%

If a company (NAICS 5417) would relocate or expand to an additional location in the next 5 years, what is the best estimate of the total amount of building space in square feet you would need? (Include exterior infrastructure areas like parking, loading docks and/or equipment storage) (n=15)

Less than 10,000 sq. ft.	40.00%
10,000 to 25,000 sq. ft.	33.33%
25,001 to 50,000 sq. ft.	20.00%
50,001 to 75,000 sq. ft.	6.67%
75,001 to 100,000 sq. ft.	0.00%
Over 100,000 sq. ft.	%

If a company (NAICS 5417) would relocate or expand to an additional location in the next 5 years, what is the best estimate of annual sales or revenue at this location? (n=15)

Under \$1 million per year	26.67%
\$1 million to \$2 million per year	26.67%
Over \$2 million to \$3 million per year	6.67%
Over \$3 million to \$5 million per year	6.67%
Over \$5 million to \$10 million per year	20.00%
Over \$10 million per year	13.33%

## NAICS CODE 6214

### **6214 Outpatient Care Centers**

#### **62141 Family Planning Centers**

#### **62142 Outpatient Mental Health & Substance Abuse Centers**

#### **62149 Other Outpatient Care Centers**

**6214 Description:** This NAICS industry group includes establishments classified in the following NAICS industries: 62141, Family Planning Centers; 62142, Outpatient Mental Health and Substance Abuse Centers; and 62149, Other Outpatient Care Centers.

**62141 Description:** This industry comprises establishments with medical staff primarily engaged in providing a range of family planning services on an outpatient basis, such as contraceptive services, genetic and prenatal counseling, voluntary sterilization, and therapeutic and medically indicated termination of pregnancy.

**62142 Description:** This industry comprises establishments with medical staff primarily engaged in providing outpatient services related to the diagnosis and treatment of mental health disorders and alcohol and other substance abuse. These establishments generally treat patients who do not require inpatient treatment. They may provide a counseling staff and information regarding a wide range of mental health and substance abuse issues and/or refer patients to more extensive treatment programs, if necessary.

**62149 Description:** This industry comprises establishments with medical staff primarily engaged in providing general or specialized outpatient care (except family planning centers and outpatient mental health and substance abuse centers). Centers or clinics of health practitioners with different degrees from more than one industry practicing within the same establishment (i.e., Doctor of medicine and Doctor of dental medicine) are included in this industry.

## Economic Census Trends - 1997

<b>NAICS 6214</b>	<b>1997</b>
Number of Establishments	21,768
Receipts/Revenues (\$1,000)	\$48,867,818
Annual Payroll (\$1,000)	\$16,659,790
Employees	520,310
Average Payroll Per Job	\$32,018
Average Employment Per Establishment	23.90
Average Receipts/Revenue Per Establishment	\$2,244,938

<b>NAICS 62141</b>	<b>1997</b>
Number of Establishments	1,833
Receipts/Revenues (\$1,000)	\$945,710
Annual Payroll (\$1,000)	\$391,499
Employees	18,122
Average Payroll Per Job	\$21,603
Average Employment Per Establishment	9.89
Average Receipts/Revenue Per Establishment	\$515,935

<b>NAICS 62142</b>	<b>1997</b>
Number of Establishments	6,294
Receipts/Revenues (\$1,000)	\$6,218,451
Annual Payroll (\$1,000)	\$2,998,197
Employees	125,097
Average Payroll Per Job	\$23,966
Average Employment Per Establishment	19.88
Average Receipts/Revenue Per Establishment	\$987,885

<b>NAICS 62149</b>	<b>1997</b>
Number of Establishments	13,641
Receipts/Revenues (\$1,000)	\$41,703,657
Annual Payroll (\$1,000)	\$13,270,094
Employees	377,091
Average Payroll Per Job	\$35,190
Average Employment Per Establishment	27.64
Average Receipts/Revenue Per Establishment	\$3,057,228

Source: US Census Bureau

### Top 10 States (NAICS 6214)

	Establishments	Revenues (\$000)	Annual Payroll (\$1,000)	Paid Employees
<b>Total U.S.</b>	<b>21,768</b>	<b>\$48,867,818</b>	<b>\$16,659,790</b>	<b>520,310</b>
California	2,334	\$11,154,771	\$1,782,461	53,514
New York	1,235	\$2,770,950	\$1,266,730	38,659
Minnesota	467	\$2,759,822	\$1,249,218	30,327
Massachusetts	633	\$2,233,689	\$1,052,360	28,142
Florida	1,510	\$2,233,558	\$807,024	28,467
Texas	1,438	\$2,054,749	\$721,762	24,242
Pennsylvania	1,001	\$1,978,711	\$783,683	25,352
Georgia	586	\$1,614,332	\$646,057	16,361
Illinois	763	\$1,573,062	\$547,198	17,736
Michigan	722	\$1,567,157	\$588,462	17,594
<b>Total</b>	<b>10,689</b>	<b>\$29,940,801</b>	<b>\$9,444,955</b>	<b>280,394</b>
<b>% of U.S.</b>	<b>49.10%</b>	<b>61.27%</b>	<b>56.69%</b>	<b>53.89%</b>

### Western States (NAICS 6214)

	Establishments	Revenues (\$000)	Annual Payroll (\$1,000)	Paid Employees
<b>Total U.S.</b>	<b>21,768</b>	<b>\$48,867,818</b>	<b>\$16,659,790</b>	<b>520,310</b>
California	2,334	\$11,154,771	\$1,782,461	53,514
Washington	576	\$1,450,737	\$584,638	17,588
Arizona	421	\$1,018,215	\$313,404	9,843
Colorado	435	\$771,719	\$250,526	8,872
Oregon	250	\$586,581	\$239,873	7,279
Hawaii	103	\$491,872	\$115,510	2,819
New Mexico	178	\$437,325	\$156,854	5,412
Nevada	101	\$163,672	\$59,124	1,695
Utah	119	\$143,882	\$62,725	1,859
Alaska	64	\$101,128	\$46,544	1,529
Idaho	110	\$77,519	\$28,058	1,097
Wyoming	37	\$21,294	\$11,652	503
Montana	128	D	D	1000-2499
<b>Total Region</b>	<b>4,856</b>	<b>\$16,418,715</b>	<b>\$3,651,369</b>	<b>112,010</b>
<b>% of U.S.</b>	<b>22.31%</b>	<b>33.60%</b>	<b>21.92%</b>	<b>21.53%</b>

D = Disclosed Data

\* Does not include all data

**Relocation/Expansion Decision Factors – Physical Infrastructure (Primary Data)**

NAICS 6214 (n=37)	Not Important	Somewhat Important	Important	Very Important
Access within 30 minutes to an interstate hwy	40.54%	10.81%	10.81%	37.84%
Access to Package Freight Services	51.35%	18.92%	18.92%	10.81%
Immediate access to railhead or rail spur	94.59%	2.70%	2.70%	0.00%
Access within 30 minutes to rail freight	100.00%	0.00%	0.00%	0.00%
Access to passenger air service & direct flights	64.86%	21.62%	2.70%	10.81%
Access to port or harbor facilities	97.30%	0.00%	0.00%	2.70%
Access to supplies (one day)	18.92%	29.73%	29.73%	21.62%
Access to customers (one day)	27.03%	16.22%	29.73%	27.03%
Access to 3-phase electric power	43.24%	8.11%	24.32%	24.32%
Access to natural gas pipeline	75.68%	13.51%	8.11%	2.70%
Access to an international trade port	100.00%	0.00%	0.00%	0.00%
Access to fiber optic lines	35.43%	8.11%	21.62%	35.14%
Availability of high volume water supply	59.46%	16.22%	10.81%	13.51%
Availability of high volume wastewater disposal	64.86%	16.22%	8.11%	10.81%
Availability of solid waste disposal	64.86%	8.11%	8.11%	18.92%
Availability of satellite transmission	72.97%	10.81%	2.70%	13.51%
Availability of high speed internet access	8.11%	2.70%	18.92%	70.27%
Availability of public transportation	21.62%	13.51%	29.73%	35.14%
Access to ponds and streams	94.59%	2.70%	0.00%	2.70%
Possibility for future expansion at site	16.22%	32.43%	35.14%	16.22%

**Relocation/Expansion Decision Factors – Economic Infrastructure (Primary Data)**

NAICS 6214 (n=37)	Not Important	Somewhat Important	Important	Very Important
Availability of managerial workforce	21.62%	21.62%	37.84%	18.92%
Availability of a skilled workforce	13.51%	10.81%	29.73%	45.95%
Availability of technical workforce	27.02%	13.51%	24.32%	35.14%
Availability of unskilled workforce	64.86%	18.92%	10.81%	5.41%
Favorable local labor costs	21.62%	18.92%	29.73%	29.73%
Favorable workers compensation tax rate	10.82%	16.22%	45.95%	27.03%
Favorable local tax rate	18.92%	21.62%	37.84%	21.62%
Availability of job training programs	35.14%	27.03%	18.92%	18.92%
Availability of long and short term financing	29.73%	29.73%	24.32%	16.22%

**Relocation/Expansion Decision Factors – Quality of Life (Primary Data)**

NAICS 6214 (n=37)	Not Important	Somewhat Important	Important	Very Important
Low Crime Rate	2.70%	16.22%	32.43%	48.65%
Availability and affordability of housing	18.92%	13.51%	32.43%	35.14%
High environmental quality	13.51%	21.62%	27.03%	37.84%
Outdoor recreation opportunities	29.73%	16.22%	27.03%	27.03%
Social and cultural opportunities	27.03%	29.73%	29.73%	13.51%
Retail shopping opportunities	40.54%	29.73%	21.62%	8.11%
Quality of education system	18.92%	16.22%	16.22%	48.65%
Availability of local college or university	29.73%	10.81%	24.32%	35.14%
Availability of quality health care	5.41%	8.11%	18.92%	67.57%
Availability of fire protection	0.00%	13.51%	37.84%	48.65%
Ease of attracting skilled workers	8.11%	13.51%	32.43%	45.95%

**Relocation/Expansion Decision Factors – Sources Used to Find Locations Primary Data)**

NAICS 6214 (n=15)	Don't Use	Use a Little	Use	Use a Lot
Radio and television	66.67%	26.67%	0.00%	6.67%
Local newspaper	26.67%	46.67%	6.67%	20.00%
National newspaper	86.67%	6.67%	0.00%	6.67%
Regional trade publications	53.33%	26.67%	6.67%	13.33%
National trade publications	73.33%	13.33%	6.67%	6.67%
Local chamber of commerce	20.00%	26.67%	13.33%	40.00%
State chamber of commerce	66.67%	0.00%	13.33%	20.00%
Local economic development agencies	26.67%	26.67%	26.67%	20.00%
State economic development agencies	60.00%	13.33%	20.00%	6.67%
Real estate agent	26.67%	40.00%	26.67%	6.67%
Internet	13.33%	6.67%	6.67%	73.33%
Word of mouth	0.00%	33.33%	20.00%	46.67%
Vacation travel experience	66.67%	13.33%	13.33%	6.67%

**Miscellaneous Industry Information (Primary Data)**

NAICS 6214 (n=37)	Not Provided	Provided
Non managerial health insurance	10.81%	89.19%
Non managerial paid vacation	2.70%	97.30%
Non managerial job related training programs	18.92%	81.08%
Non managerial retirement plan with employer contributions	35.14%	64.86%
	Yes	No
Company relocated or expanded in the last 5 years	67.57%	32.43%

If a company (NAICS 6214) would relocate or expand to an additional location in the next 5 years, what is the best estimate of approximately how many total acres of property you would need? (n=37)

Less than 1 acre	40.54%
1 to 3 acres	18.92%
4 to 5 acres	24.32%
Over 5 acres	16.22%

If a company (NAICS 6214) would relocate or expand to an additional location in the next 5 years, what is the best estimate of the total amount of building space in square feet you would need? (Include exterior infrastructure areas like parking, loading docks and/or equipment storage) (n=15)

Less than 10,000 sq. ft.	40.00%
10,000 to 25,000 sq. ft.	33.33%
25,001 to 50,000 sq. ft.	13.33%
50,001 to 75,000 sq. ft.	13.33%
75,001 to 100,000 sq. ft.	0.00%
Over 100,000 sq. ft.	0.00%

If a company (NAICS 6214) would relocate or expand to an additional location in the next 5 years, what is the best estimate of annual sales or revenue at this location? (n=15)

Under \$1 million per year	53.33%
\$1 million to \$2 million per year	33.33%
Over \$2 million to \$3 million per year	6.67%
Over \$3 million to \$5 million per year	6.67%
Over \$5 million to \$10 million per year	0.00%
Over \$10 million per year	0.00%

## NAICS CODE 6215

### 6215 Medical & Diagnostic Laboratories

**6215 Description:** This industry comprises establishments known as medical and diagnostic laboratories primarily engaged in providing analytic or diagnostic services, including body fluid analysis and diagnostic imaging, generally to the medical profession or to the patient on referral from a health practitioner.

#### Economic Census Trends, 1997

NAICS 6215	1997
Number of Establishments	9,076
Receipts/Revenues (\$1,000)	\$16,317,096
Annual Payroll (\$1,000)	\$5,401,749
Employees	151,338
Average Payroll Per Job	\$35,693
Average Employment Per Establishment	16.67
Average Receipts/Revenue Per Establishment	\$1,797,829

Source: US Census Bureau

#### Top 10 States (NAICS 6215), 1997

	Establishments	Revenues (\$000)	Annual Payroll (\$1,000)	Paid Employees
<b>Total U.S.</b>	<b>9,076</b>	<b>\$16,317,096</b>	<b>\$5,401,749</b>	<b>151,338</b>
California	1,555	\$2,269,646	\$738,397	21,224
New York	760	\$1,321,651	\$483,138	12,259
Texas	604	\$1,102,337	\$361,783	9,899
Florida	809	\$1,064,159	\$332,052	9,680
New Jersey	355	\$1,044,326	\$310,940	7,493
Pennsylvania	468	\$860,879	\$289,296	7,985
Maryland	244	\$587,560	\$144,719	4,859
Massachusetts	220	\$473,431	\$169,901	4,550
Illinois	333	\$464,702	\$157,026	4,685
Michigan	237	\$457,465	\$170,165	4,630
<b>Total</b>	<b>5,585</b>	<b>\$9,646,156</b>	<b>\$3,157,417</b>	<b>87,264</b>
<b>% of U.S.</b>	<b>61.54%</b>	<b>59.12%</b>	<b>58.45%</b>	<b>57.66%</b>



**Western States (NAICS 6215), 1997**

	Establishments	Revenues (\$000)	Annual Payroll (\$1,000)	Paid Employees
<b>Total U.S.</b>	<b>9,076</b>	<b>\$16,317,096</b>	<b>\$5,401,749</b>	<b>151,338</b>
California	1,555	\$2,269,646	\$738,397	21,224
Washington	180	\$399,152	\$148,331	3,819
Arizona	165	\$283,921	\$93,185	2,797
Nevada	54	\$192,347	\$68,606	1,706
Oregon	79	\$178,985	\$55,898	1,719
Utah	47	\$166,937	\$59,127	1,748
Colorado	109	\$160,194	\$52,972	1,881
Hawaii	42	\$139,451	\$45,210	1,264
New Mexico	67	\$94,161	\$32,994	1,382
Idaho	33	\$40,565	\$12,453	361
Alaska	18	\$17,460	\$7,373	153
Montana	24	\$15,172	\$5,639	236
Wyoming	15	\$12,119	\$5,153	166
<b>Total Region</b>	<b>2,388</b>	<b>\$3,970,110</b>	<b>\$1,325,338</b>	<b>38,456</b>
<b>% of U.S.</b>	<b>26.31%</b>	<b>24.33%</b>	<b>24.54%</b>	<b>25.41%</b>

D = Disclosed Data

**Relocation/Expansion Decision Factors – Physical Infrastructure (Primary Data)**

NAICS 6215 (n=33)	Not Important	Somewhat Important	Important	Very Important
Access within 30 minutes to an interstate hwy	18.18%	18.18%	21.21%	42.42%
Access to Package Freight Services	21.21%	9.09%	21.21%	48.48%
Immediate access to railhead or rail spur	90.63%	6.25%	3.13%	0.00%
Access within 30 minutes to rail freight	93.94%	3.03%	3.03%	0.00%
Access to passenger air service & direct flights	42.42%	21.21%	9.09%	27.27%
Access to port or harbor facilities	93.94%	3.03%	0.00%	3.03%
Access to supplies (one day)	24.24%	6.06%	30.30%	39.39%
Access to customers (one day)	21.21%	6.06%	39.39%	33.33%
Access to 3-phase electric power	27.27%	0.00%	18.18%	54.55%
Access to natural gas pipeline	54.55%	12.12%	15.15%	15.15%
Access to an international trade port	90.91%	9.09%	0.00%	0.00%
Access to fiber optic lines	24.24%	21.21%	24.24%	30.30%
Availability of high volume water supply	66.67%	9.09%	15.15%	9.09%
Availability of high volume wastewater disposal	72.73%	12.12%	15.15%	0.00%
Availability of solid waste disposal	51.52%	9.09%	21.21%	18.18%
Availability of satellite transmission	48.48%	24.24%	18.18%	9.09%
Availability of high speed internet access	0.00%	6.06%	15.15%	78.79%
Availability of public transportation	42.42%	18.18%	27.27%	12.12%
Access to ponds and streams	96.97%	3.03%	0.00%	0.00%
Possibility for future expansion at site	21.21%	18.18%	45.45%	15.15%

**Relocation/Expansion Decision Factors – Economic Infrastructure (Primary Data)**

NAICS 6215 (n=33)	Not Important	Somewhat Important	Important	Very Important
Availability of managerial workforce	21.21%	15.15%	45.45%	18.18%
Availability of a skilled workforce	0.00%	12.12%	48.48%	39.39%
Availability of technical workforce	9.09%	9.09%	27.27%	54.55%
Availability of unskilled workforce	66.67%	21.21%	6.06%	6.06%
Favorable local labor costs	21.21%	15.15%	24.24%	39.39%
Favorable workers compensation tax rate	15.15%	6.06%	39.39%	39.39%
Favorable local tax rate	21.21%	6.06%	36.36%	36.36%
Availability of job training programs	54.55%	12.12%	18.18%	15.15%
Availability of long and short term financing	30.30%	27.27%	24.24%	18.18%

**Relocation/Expansion Decision Factors – Quality of Life (Primary Data)**

NAICS 6215 (n=33)	Not Important	Somewhat Important	Important	Very Important
Low Crime Rate	0.00%	15.15%	45.45%	39.39%
Availability and affordability of housing	9.09%	18.18%	48.48%	24.24%
High environmental quality	9.09%	12.12%	48.48%	30.30%
Outdoor recreation opportunities	30.30%	18.18%	39.39%	12.12%
Social and cultural opportunities	24.24%	30.30%	36.36%	9.09%
Retail shopping opportunities	33.33%	21.21%	30.30%	15.15%
Quality of education system	15.15%	9.09%	24.24%	51.52%
Availability of local college or university	21.21%	21.21%	39.39%	18.18%
Availability of quality health care	0.00%	0.00%	33.33%	66.67%
Availability of fire protection	3.03%	6.06%	30.30%	60.61%
Ease of attracting skilled workers	9.09%	3.03%	36.36%	51.52%

**Relocation/Expansion Decision Factors – Sources Used to Find Locations Primary Data)**

NAICS 6215 (n=15)	Don't Use	Use a Little	Use	Use a Lot
Radio and television	80.00%	20.00%	0.00%	0.00%
Local newspaper	33.33%	40.00%	20.00%	6.67%
National newspaper	53.33%	26.67%	6.67%	13.33%
Regional trade publications	13.33%	40.00%	20.00%	26.67%
National trade publications	40.00%	20.00%	13.33%	26.67%
Local chamber of commerce	40.00%	20.00%	13.33%	26.67%
State chamber of commerce	60.00%	13.33%	6.67%	20.00%
Local economic development agencies	40.00%	33.33%	6.67%	20.00%
State economic development agencies	46.67%	13.33%	13.33%	26.67%
Real estate agent	33.33%	46.67%	6.67%	13.33%
Internet	6.67%	13.33%	13.33%	66.67%
Word of mouth	0.00%	20.00%	13.33%	66.67%
Vacation travel experience	66.67%	33.33%	0.00%	0.00%

**Miscellaneous Industry Information (Primary Data)**

NAICS 6215 (n=33)	Not Provided	Provided
Non managerial health insurance	6.06%	93.94%
Non managerial paid vacation	6.06%	93.94%
Non managerial job related training programs	15.15%	84.85%
Non managerial retirement plan with employer contributions	21.21%	78.79%
	Yes	No
Company relocated or expanded in the last 5 years	72.73%	27.27%

If a company (NAICS 6215) would relocate or expand to an additional location in the next 5 years, what is the best estimate of approximately how many total acres of property you would need? (n=33)

Less than 1 acre	36.36%
1 to 3 acres	18.18%
4 to 5 acres	24.24%
Over 5 acres	21.21%

If a company (NAICS 6215) would relocate or expand to an additional location in the next 5 years, what is the best estimate of the total amount of building space in square feet you would need? (Include exterior infrastructure areas like parking, loading docks and/or equipment storage) (n=15)

Less than 10,000 sq. ft.	40.00%
10,000 to 25,000 sq. ft.	33.33%
25,001 to 50,000 sq. ft.	0.00%
50,001 to 75,000 sq. ft.	13.33%
75,001 to 100,000 sq. ft.	13.33%
Over 100,000 sq. ft.	0.00%

If a company (NAICS 6215) would relocate or expand to an additional location in the next 5 years, what is the best estimate of annual sales or revenue at this location? (n=15)

Under \$1 million per year	73.33%
\$1 million to \$2 million per year	13.33%
Over \$2 million to \$3 million per year	0.00%
Over \$3 million to \$5 million per year	6.67%
Over \$5 million to \$10 million per year	0.00%
Over \$10 million per year	0.00%