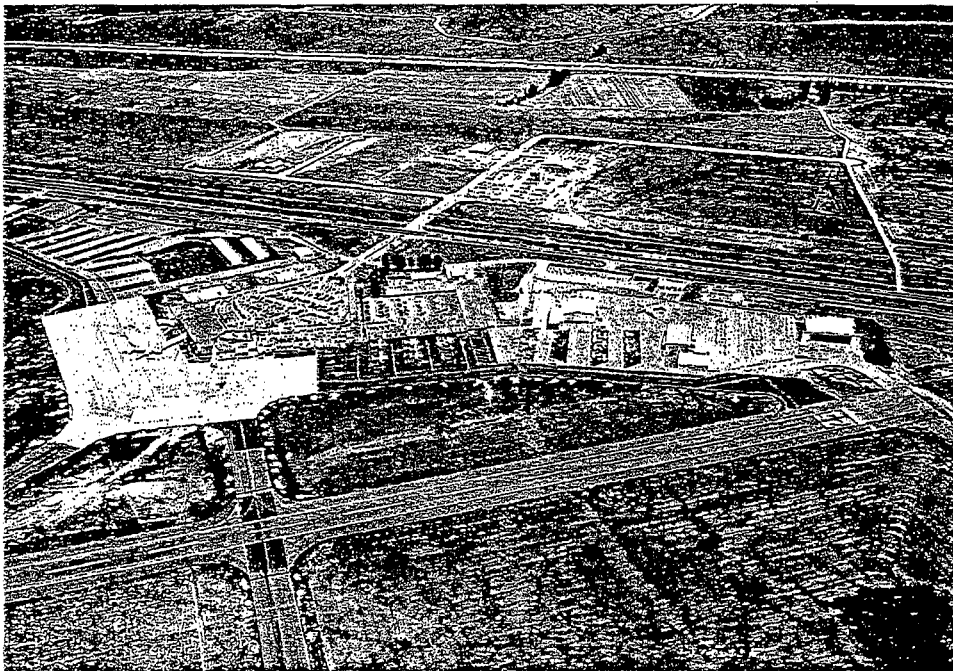


# MISSOULA AIRPORT DEVELOPMENT PARK MASTER PLAN & STRATEGIC IMPLEMENTATION PLAN

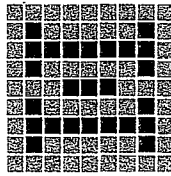


Prepared for :

Missoula County Board of Commissioners  
Missoula, Montana

Prepared by:

HOH Associates, Inc.  
Leland Consulting Group  
Druyvestein, Johnson and Anderson, Inc.



HOH Associates, Inc.

August 4, 1994

Mr. John DeVore, Administrator  
Missoula Board of County Commissioners  
200 West Broadway Street  
Missoula, Montana 59802-4292

Dear Mr. DeVore:

On behalf of the project team of Leland Consulting Group, Druyvestein, Johnson and Anderson and HOH Associates, Inc., I am pleased to submit the final draft of the *Missoula Airport Development Park Master Plan and Strategic Implementation Plan*.

We believe very strongly that this draft lays critical groundwork for realizing this exciting community initiative. I wish to thank everyone who has contributed to this effort, including the Development Planning Committee, Concept Teams, County Commissioners and County staff.

We have made revisions to the April and June drafts which we believe are responsive to staff and Development Committee comments and we look forward to the presentation of this document to the County Commissioners. Furthermore, we believe that the concepts and recommendations contained in this report offer a firm foundation for developing a successful Airport Development Park which will be of significant benefit to the Missoula community.

We have very much enjoyed working with you and the other participants on this project and look forward to being of further assistance during the implementation phase.

Sincerely,

HOH ASSOCIATES, INC.

David G. Cooper  
Vice President

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Planning  
Landscape Architecture  
Urban Design

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# EXECUTIVE SUMMARY

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## INTRODUCTION

This document presents background research, concepts and recommendations for the planning and implementation of the Missoula Airport Development Park. It was prepared by the consulting team of HOH Associates, Inc., Leland Consulting Group and Druyvestein, Johnson and Anderson for the Missoula Board of County Commissioners. Funding for the study was provided by the Office of Economic Development Administration (EDA), Missoula County Airport Authority and Missoula County.

The work presented in this document was developed with significant input by the Missoula community over the eight month planning period. This includes technical overview of the process and products by the Development Planning Committee and input into the formulation of land use and development concepts by three Concept Planning Teams, which developed community-based land use concepts early in the planning process.

Market and economic research activities included an analysis of Missoula's Regional Business Climate, development of a Business Location Profile, and creation of a list of Target Industries. Physical planning activities included formulation of project goals, analysis of the site and surrounding context, formulation of a land use program and development concepts for the site. This work was supplemented by the concept plan alternatives which were developed by the community.

The Proposed Master Plan was prepared to present the recommended land uses for the site within a physical framework of roads and open space systems. Recommendations for capital improvements and preliminary cost estimates for on-site and off-site infrastructure were also prepared, based upon the Proposed Master Plan.

The Strategic Implementation Plan is the concluding section of this document, and brings together the final conclusions and recommendations of the planning effort. It includes a discussion of recommended development concept and strategy, organizational and management structures, disposition and facilities strategy, project image, marketing and funding.

Following is an expanded summary of each of the sections in the document:

## REGIONAL BUSINESS CLIMATE

The analysis of Missoula's regional business climate provides economic, demographic and employment information of interest to potential firms relocating or expanding within the Missoula region. It is supplemented by a preliminary market analysis of potential land uses for the Development Park.

A Business Location Profile was prepared which analyzed Missoula in terms of key characteristics that affect corporate siting decisions. These include labor force characteristics, access to markets, transportation, utilities, land and building costs, state and local business climate and quality of life.

The purpose of this analysis is to identify Missoula's strengths and weakness relative to its competition, in order that programs and strategies can be developed which capitalize upon Missoula's strengths and which minimize or compensate for its weaknesses. This information is presented in the document in a format which allows comparison with other communities in the region.

The Missoula areas was found to compare less favorably to larger cities in the Rocky Mountain Region, particularly with respect to labor force characteristics and access to markets/resources. Missoula's relatively poor access to markets is partially overcome by the area's generally superior transportation service. Montana's state tax structure, which has a profound impact on Missoula economic development efforts, also appears to put it at a competitive disadvantage relative to other Western states.

In contrast, businesses locating in the Missoula area will have the advantages of a highly educated workforce, competitive utility rates and real estate costs, and a superior quality of life. The Missoula Airport Development Park also represents a potential competitive advantage, particularly due to its proposed size and the fact that its development will be carefully controlled by the County.

#### TARGET INDUSTRY IDENTIFICATION

An important component in planning the Missoula Airport Development Park is the identification of target industries and business organizations with a strong likelihood of locating within the subject property. The Target Industry Analysis provides direction to future marketing efforts and assists in defining the project theme and supporting land uses and services within the planning area.

By focusing the land use program to those industries which will potentially seek reallocation and expansion opportunities in the market, the Missoula area will make the most efficient use of available resources and more effectively position itself for local investment.

The industries and business groups that have been identified as having potential for local investment reflect the competitive advantages of the Missoula market area. These industry groups show potential for future growth in sales and employment, both regionally and nationally, and they are considered compatible with the Missoula area market. The business categories or "clusters" which have been identified to have the greatest potential are the following:

- Value-added Fabrics
- Food and Beverage Production
- Building Materials

- Tools of Technology
- Transportation
- Business Support
- Recreation and Sporting Goods
- Entrepreneur

The likelihood of all these industries locating within the Missoula Airport Development Park is extremely remote. The potential for one or a combination of these industries is greater. However, the potential for any of these industries, or a similar industry within their industry group, to locate within either the Development Park or the Missoula area is very possible, given the similarities of location criteria among the various industry groups.

By identifying specific potential users, the Target Industry Analysis provides valuable input into the formulation of the Land Use Program for the Park as well as the overall planning and marketing concepts.

#### DEVELOPMENT PARK MASTER PLAN

The formulation of the Airport Development Park Master Plan brought together the analysis and conclusions of market and economic factors, understanding of the physical constraints and opportunities of the site and the consultant's understanding of community preferences.

Key physical factors which influence the plan include existing residential and non-residential development, availability of infrastructure, relationship to Missoula County Airport and the potential impacts of the planned Interstate 90 airport interchange project.

The Proposed Master Plan illustrates the planning framework for the site in terms of land use, streets and other transportation elements, open space and response to site elements and existing development. It is intended to include employment, support and community uses.

The overall goal is to create a high quality community asset while achieving the economic and market goals for the project. Major features of the plan include commercial development near the planned interchange and a university or college-affiliated business park and technical training center in the southern portion of the site, which will reinforce the economic development focus of the project.

Employment uses are to comprise the majority of the development program and include office, research and development (R&D), light industrial, industrial and warehouse uses. Support uses include office, hotel and retail. Community uses include public parks and perimeter and internal open space and trail systems. Portions of the site are recommended as development reserves.

The Land Use Program directly reflects the market and economic analysis of the Missoula area that was done earlier in the process, as well as community input

relative to land use and development concepts. It provides a description of the uses and activities which are envisioned for the site and which are illustrated on the Proposed Master Plan.

#### Land Use Program:

Land Use Type	Area	% of Project
Signature Office/Retail	10 Acres	2 %
Retail Center	8	2
Office/Hotel	15	3
Office/Research and Development (R&D)	32	7
University -Affiliated Business and Tech. Park	43	10
Technical Training Center	14	3
Research and Development (R&D)	40	9
Light Industrial	71	16
Industrial/Warehouse	56	13
Reserve Areas	82	18
Parks, Trails and Open Space	34	8
Street R.O.W.	41	9
<b>TOTAL</b>	<b>446 Acres</b>	<b>100 %</b>

#### CAPITAL IMPROVEMENTS

Capital improvements recommendations were prepared based upon the consultant team's preliminary understanding of capital improvements requirements and the Proposed Master Plan. Major improvements include roads, water mains, sewer mains, storm drainage, gas, telephone, telecommunications, sidewalks, bikeways, park amenities, open space and parks.

The purpose of this information is to identify the major capital improvements, both on-site and off-site, as well as to estimate the general magnitude of costs. It is intended to aid in future analysis regarding the financing and phasing of improvements, allocation of future development costs and creation of appropriate cost recovery mechanisms.

Major capital improvements for the Development Park include improvements that fall within the physical boundaries of the park as well as those which serve the park and the surrounding area. In some cases, connections to serve the park may be possible from utilities already serving Momont Industrial Park. In other cases, new system connections will have to be established.

Based upon the Proposed Master Plan and capital improvements recommendations, "order of magnitude" cost estimates were prepared for the Airport Development Park. Costs within the park could be on the order of \$8 to 10 million, not including the costs for individual users to develop their parcels and lots. Costs for improvements outside of the park could range from \$3 to 5 million.

Assuming that the 371 acres within the Park are developable (based upon the Master Plan) and not taking into account that a significant portion of these costs will be paid for by the Interchange Project or shared with neighboring properties, a total infrastructure cost of \$11 - 15 million translates into an allocation of approximately \$30 to 40 thousand per developable acre within the Airport Development Park.

This allocation can be reduced due to two factors. The first is the potential impact of contributions by other parties in the area who benefit from these infrastructure improvements. The magnitude of this potential contribution is not known at this time. The second factor is the impact of Federal funding of the Interchange Project, which will reduce the overall infrastructure funding requirement by about half (approximately \$8 million), which in turn could reduce the developable land allocation to \$15 to \$20 thousand per-acre.

With this in mind, it is strongly recommended that a utility master plan overlay be prepared, based upon the Development Park Master Plan. This should provide more detailed information about water, sewer, storm drainage, gas, electric, telephone and fiber optic layout, as well as identify potential areas of cooperation and cost-sharing between the Development Park, airport and neighboring properties.

In addition, concepts for park amenities and other features should be developed and cost estimates prepared for these elements. Based upon these additional studies and related master plan refinements, cost allocation and recovery schemes can be formulated for the Development Park and surrounding area, which will allow development to occur in a phased manner, in response to market conditions.

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## STRATEGIC IMPLEMENTATION PLAN

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The final section of the document presents priority recommendations as to how Missoula should proceed to implement the Airport Development Park, in terms of development, financing, management and marketing.

It begins with case studies of six successful community-developed industrial and business parks, which provide qualitative and quantitative information for each project and key "lessons learned". Following this, recommendations are presented by a systematic discussion of the recommended implementation activities which need to occur for the project to be successful.

When completed, the park represents approximately \$24 to \$27 million in land sales (or lease equivalents) and in excess of \$100 million of total capital investment involving the development of land and buildings. This does not include the direct

and indirect economic benefits that come from construction nor the ongoing payroll, both direct and indirect, resulting from jobs that are created within the park.

For a project of this magnitude to be successful, success is dependent upon a high-quality, consistently operated, maintained and dependable environment. The recommended structure for implementation of the Missoula Airport Development Park is a focused, land development organization designed to both implement and operate the park. Under this scenario, the County sells or leases the property to the development organization, which in turn serves as an intermediary to government and park tenants, representing the interests of both.

Because real estate development is always subject to the pressures of shifts in the market, fluctuation in the cost of capital, overbuilding and other industry issues, mitigation for these and other extraordinary challenges that could impact the park are the following:

- Establish a management organization which can operate as a business and insulate management from local politics.
- Establish a direct reporting relationship between senior project management and the County Administrator, thereby minimizing directives from a variety of people and institutions.
- Provide for an adequate annual budget to assure that technical services and particularly marketing services are available and appropriate to industry standards.

In addition, for a project of this scale and magnitude to be successful, it will require the establishment of rigorous standards and design guidelines, as well as ongoing performance requirements. Discriminating businesses welcome a tightly-regulated environment in which landscaping and building standards are adhered to, grounds are maintained and other standards are rigorously upheld, thereby protecting the value of any individual asset constructed within the park.

With consideration of the above, following are the principal recommendations for the Airport Development Park:

<b>Development Concept:</b>	Employment-based, mixed-use, multi-phase, land development project involving a range of land uses and activities.
<b>Development Strategy:</b>	Public/Private Joint Venture - County and private developer contribute some combination of the following: land, capital and experience to development of the property.
<b>Organizational Structure:</b>	Development Authority - Entity which maintains oversight of development, management and marketing; funds, finances



and negotiates development agreements and leases. A viable development entity under this scenario would be a Port Authority.

**Disposition and Facilities Strategy:** Combination of Land Sales and Leases - Disposition strategy is influenced by community interests, long-term goals for the project and mandates of the organizational entity. A viable strategy would be sale of the high value sites along the access road. Sites identified for future public use could be retained and held in reserve for future use and select sites may be leased if the immediate use and facilities are temporary.

**Management Structure:** Experienced Project Manager - It is recommended that an independent, experienced individual be recruited through a cooperative search by the joint venture partners. Individual may act as Project Manager for this project exclusively, or as Director of the Development Authority.

**Park Image:** Combined Image - Affiliation with the Airport, Government and the University.

**Funding Mechanisms:** Combination of Public and Private Dollars - State and Federal grants and capital dollars from the joint venture partner.

**Marketing Strategies:** Coordinated effort with Project Management staff and Missoula Area Economic Development Corporation.

## SECTION I:

# INTRODUCTION

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This report presents the background, analysis concepts and recommendations relative to the *Missoula Airport Development Park Master Plan and Strategic Implementation Plan*. It has been prepared by the consultant team on behalf of the Missoula County Board of Commissioners, with the advice and input of a variety of sources during the planning process, which occurred between August 1993 and April 1994.

The draft has been reviewed by the Development Planning Committee and County staff and is intended for presentation and review by the County Commissioners, interested parties and the general public.

### PURPOSE OF THE STUDY

The purpose of this study is to prepare a master plan and implementation strategy for the 446 acre development park site, which is largely owned by Missoula County and is one of the larger industrial-zoned tracts of land in Missoula County. Located between Interstate 90 and the Missoula International Airport, the site is largely undeveloped but will soon be impacted by the construction of a freeway interchange, airport access road and expressway linking the access road with on-site and off-site development.

In commissioning this study and incorporating significant community involvement, the Missoula County Board of Commissioners believes that it can develop and successfully implement an overall strategy for development of the site. This will capitalize upon the unique economic and social opportunity that this asset represents while respecting the unique values and aspirations of the larger Missoula community.

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This study was prepared under a grant from the Economic Development Administration (EDA) with matching funding by Missoula County and the Missoula County Airport Authority. The consultant team engaged to prepare the study was comprised of the planning firm of HOH Associates, Inc. (planning and project management) in association with the Leland Consulting Group (market, economics and real estate advisors) and Druyvestein, Johnson and Anderson (engineering, infrastructure and cost estimating). Marlene Nesary served as project evaluator.

This study was developed over the period from August 1993 to March 1994 through the combined efforts of the consultant team, the Development Planning Committee and Concept Teams (appointed by the County Commissioners for this purpose), stakeholder groups, the general public and county staff.

## REGIONAL CONTEXT

The Missoula Airport Development Park site is located in Missoula County, just northwest of the City of Missoula, in central western Montana. The site is adjacent to Missoula International Airport and Interstate 90, which runs west to Seattle and east to the Chicago area. Missoula is a regional center serving a trade area of over 220,000 people in western Montana, Idaho and eastern Washington. It is located approximately 500 miles from Seattle and Salt Lake City, 400 miles from Calgary and 300 miles from Spokane. Missoula's location is diagrammed on the following Site Location map.

## PLANNING PROCESS

The study was prepared over a seven month period in close coordination between the consultant team, several appointed community groups and Missoula County staff. The process included several phases which are listed below and which are graphically depicted in the Project Work Flow diagram, which is included in the Appendix:

- Pre-Planning Activities
- Market and Site Analysis
- Concept Team Alternatives, Target Industry and Business Opportunities Analysis
- Formulation of the Development Park Master Plan
- Preliminary Strategic Implementation Plan
- Strategic Implementation Plan Refinement

### Development Planning Committee

A major source of input has been the twelve member Development Planning Committee, an advisory group appointed by the Missoula County Commissioners. The purpose is to provide general direction to the project as well as technical oversight and review of consultant team analysis and recommendations. The Development Planning Committee met monthly throughout the planning process and its input is evidenced throughout this document.

Particular emphasis was placed upon the analysis of the regional business climate, preparation of a business location profile and identification of target industries for Missoula. Members of the Committee include the following:

John DeVore, Admin. Officer	Missoula County
Chris Behan, Project Manager	Missoula Redevelopment Agency
Tim Phillips, Director	Missoula County Airport
John Crowley, Prop. Devel. Manager	Washington Corporation
Horace Brown, Surveyor	Missoula County
Jay Lentzner, Chief Engineer	Montana Rail Link
Ron Klaphake, President	Missoula Area Economic Development Corp.
Harriet Mullaney, VP of Admin.	NURTURE, Inc.

Larry Swanson  
Casey Jones, President

Bureau of Business and Econ. Research  
Jones Brothers Trucking

#### Concept Planning Teams:

Additional community input was provided early in the project by three Concept Teams, which were also appointed by the County Commissioners to reflect the broader makeup of the Missoula community. Concept Team members included leaders from business, financial institutions, education, industry, real estate and government. Members of the Concept Teams include the following:

##### Concept Team 1:

Ann Mary Dussault, Chair  
Kathey Ogren, Owner and President  
Susan Selig Wallwork, Director  
of Survey Research  
George Lambros, Owner and Broker  
W.G. Stuart, General Manager  
Doug Bardwell, Executive Vice Pres.  
Harry Fritz, Professor

Missoula County Commissioner  
Bitterroot Motors  
Bureau of Business and Economic Research  
Lambros Real Estate  
Stone Container  
Western Federal Savings Bank, Montana  
History Department, U. of Montana

##### Concept Team 2:

Barbara Evans  
Penny Capps, Manager  
Tom Power, Chair  
Dave Theisen, Contractor  
Vivian Brooke  
Walt Hill, Professor  
Mae Nan Ellingson, Attorney

Missoula County Commissioner  
Community Affairs, US West Comm.  
Economics, University of Montana  
Residential Development  
Montana State Legislator  
Division of Biological Sciences,  
University of Montana  
Dorsey and Whitney

##### Concept Team 3:

Fern Hart  
Doug Harrison, Customer Service  
Paul Polzin, Director  
Orville Daniels, Supervisor  
Helena Maclay, Attorney  
Doug Anderson, General Manager  
Larry Gianchetta, Dean  
Ken Clawson, Director  
Missoula Energy Services

Missoula County Commissioner  
Mountain Water Company  
Bureau of Business and Economic  
Research, University of Montana  
Lolo National Forest  
Knight, Maclay and Masar  
Southgate Mall  
School of Business Administration  
University of Montana  
Montana Power Company

The Concept Teams met three times during the months of October and November in workshops which were facilitated by the consultant team. The purpose of these

workshops was to enable the participants to identify and discuss development issues and formulate three distinct master plan concepts for the 446 acre site.

During the workshops the participants reviewed case studies of similar projects and focussed on physical planning concerns, including site conditions, existing development, transportation systems and infrastructure, relationship of public and private uses, employment land uses, support activities, site amenities and potential project themes. The team concepts formulated in these workshops were presented to the Development Planning Committee in January 1994, and are summarized in this report.

Based upon a review of these concepts relative to the project goals and objectives, input by the Development Planning Committee and the results of additional research and technical analysis, the consultant team prepared a Draft Master Plan for the site which is presented in this report. Of particular importance were conclusions that had been reached concerning market and economic conditions and opportunities, design refinements to the on-site and off-site road network and the potential impact of future land use and development in the surrounding area.

In coordination with the Draft Master Plan and reflecting ongoing discussions with members of the community, the consultant team has prepared a Strategic Implementation Plan for the project. This plan is included as the last section of this document and is intended to serve as the basis for further discussion by the participants in the planning process as to how the County might proceed with the project.

The Strategic Implementation Plan outlines the general range of options for proceeding with the project - from a marketing, organizational and financial point of view and identifies the relative advantages and disadvantages of each. It is anticipated that both the Strategic Implementation Plan and the Draft Master Plan will be refined by the consultant team after this discussion has occurred.

#### MISSION STATEMENT

The following Mission Statement was drafted by the Development Planning Committee with input from the Concept Teams. The statement serves to summarize the community's purpose for the planning and economic development study:

"The Mission of this planning and analysis effort is to develop, within the context of a regionally-based economic development strategy, a Master Plan and Strategic Implementation Plan to guide the future development of the Missoula International Airport Development Park.

The Plans should be based upon sound economic principles which can capitalize upon Missoula's current and potential position within the regional, national and global marketplaces. The Plans should result

in the creation of quality jobs and in the long term, yield a return on investment for the Missoula community.

The Plans must take into account the surrounding community context which includes significant transportation infrastructure. They should be flexible to respond to future conditions, incorporate the highest planning and design standards and allow for both current and future technology. The Plans must also embody sound environmental values, efficiently utilize human and physical resources and reflect the special attributes of the Missoula community.

The Master Plan and Strategic Implementation Plan will strive to create a model public/private partnership in which businesses can thrive and hence, allow the Missoula region to define and pursue its own future".

## **PROJECT GOALS**

The Development Committee also formulated the following Goals to guide the planning effort. They reflect the overall parameters within which the Master Plan was developed and were used to evaluate and refine the concepts and recommendations. These goals need to be referred to in the future as the Development Park proceeds into the implementation phase:

### **Economics**

- Must be financially feasible to implement.
- Should identify and assign financial risks .
- Should provide for future \$ return to the community.
- Site should "pay for itself" in terms of public investment.
- Strategy should take advantage of County's long-term capability.

### **Jobs**

- Should be stable; well-paying and high quality.
- Should have variety and differentiation.
- Should be oriented to varying levels of training and expertise.

### **Businesses/Enterprises**

- Should provide for retention, attraction and expansion.
- Identify the "target" opportunities (focus on trends).
- Allow for "entrepreneurs" which do not fit the norm.
- Provide for growth within existing Missoula businesses.
- Encourage "value added" operations.
- Encourage "synergy" between different uses.
- Understand economics of scale and "critical mass".
- Focus on "clusters" of users.

### **Transportation**

- Enhance image of area as a "gateway" to Missoula.
- Capitalize on ground and air transportation opportunities.
- Uses should not compete with airport uses.
- Master plan should provide for some transportation "hub" functions.

### **Facilities and Infrastructure**

- Master plan should "set the table" for users but retain flexibility to respond to market changes.
- Identify and provide for specific needs of targeted users.
- Provide for "shared needs" of the airport and the development park.
- Master plan should respond to demonstrated needs - do not speculate!

### **Organization, Management and Marketing**

- Organizational entity should allow for both public and private sector participation.
- Organization can be based on new or established models.
- Organization should have capability for financing, planning and ownership.
- The overall strategy needs to define appropriate roles for private and government sectors.

### **Process**

- Overseeing entity must have some discretionary authority.
- Marketing and solicitation process should identify the most desirable uses and tenants.
- Development review process should provide "ease of entry" for desired tenants.
- Development review system must be predictable and fair.

### **ADDITIONAL COMMENTS**

It is important to recognize that the above Mission Statement and Project Goals were developed at the outset of the planning process. They may need to be revisited and revised as necessary in response to other concerns and issues which may surface in the future, during the refinement of the Proposed Master Plan and design and implementation of specific elements of the Development Park.

## SECTION II:

# REGIONAL BUSINESS CLIMATE

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### INTRODUCTION

Two work products were prepared based on a review of the Missoula area regional business climate. The first product is a series of Community Profile fact sheets, prepared for the Missoula County communities of Missoula, Bonner-West Riverside, LoLo and Orchard Homes. The second product is a summary of the projected demand potential for various land uses within the Missoula market area over the near term.

### DEMOGRAPHIC STRUCTURE AND DEVELOPMENT OVERVIEW

At the onset of this engagement, the County expressed an interest in research that was more regional than site specific. Specifically, they requested that industry and land use conclusions and recommendations be applicable throughout the County and not exclusively within the Missoula Airport Development Park. Therefore, the regional business climate analysis included a review of economic, demographic, employment and market data in communities throughout the County.

#### Demographic and Economic Characteristics

Economic, demographic and employment data which is of interest to potential relocating and expanding firms is presented in the Community Profile fact sheets following this discussion. The data is presented in a format that can be used by economic development representatives involved in marketing the area. An assessment of real estate market conditions was incorporated into a market analysis of potential supporting land uses within the park.

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#### Development Overview

Several successful industrial and business parks incorporate a mix of land uses including commercial retail, commercial office, restaurant and lodging, as well as recreational amenities such as walking paths, golf courses and ball fields. At build-out, parks of a significant size can create a level of employment and traffic activity sufficient to support demand for one or a combination of these uses. However, prior to build-out and in the early stages of a project, there is rarely a level of demand which would warrant investment by, for example, a hotel or national chain restaurant developer. Exceptions to this rule include existing site conditions so desirable that additional development will only enhance the location or existing demand within the local market.



The table which follows presents the results from market analyses of potential land uses within the park. Since a detailed market analysis of any one land use requires a significant amount of research of existing and projected market conditions, and given the scope of this assignment, the analysis presented here is limited. The market demand estimates presented are based on the assumption that each of the land uses currently operates at equilibrium (existing supply accommodates existing demand) within the Missoula area market. Therefore, new demand is generated by growth in employment in the case of industrial, commercial office and restaurant uses, and growth in the population base in the case of commercial retail and restaurant uses. Basic rules-of-thumb for the development of each land use were applied for this analysis, and the results are considered to be conservative. During interviews with existing businesses in and adjacent to the park, concern over the limited number of supporting business services (i.e., computer and machinery repair, copy services, restaurants, etc.) in the area was consistently expressed. *Note: A project capture rate has not been applied. Therefore, these numbers reflect total Missoula market area demand, not just demand within the park.*

In addition to estimates of demand for these land uses, their site requirements in terms of parcel size are presented. This information was directly transferable to the land use plan. Land unit prices presented are based on recent transactions in the market with adjustment for the subject property's location. The final column identifies the likely timing for development of each use within the park upon completion of basic infrastructure improvements.

# COMMUNITY PROFILE FACT SHEETS

# COMMUNITY PROFILE

## BONNER-WEST RIVERSIDE, MONTANA

### Population and Households

	1980	1990	1993	1998	1980- 1990	1990- 1993	1993- 1998
Population	1,699	1,669	1,492	1,265	0.0%	-4.24%	-3.25%
Households	602	648	596	528	0.74%	-2.75%	-2.39%
Average Household Size	2.82	2.58	2.5	2.4			
Median Household Income	\$23,862	\$20,750	\$22,778	\$23,864			

### Age of Housing Stock

1985 to 1988	0.0%
1980 to 1984	4.4%
1970 to 1979	36.0%
1960 to 1969	16.8%
1950 to 1959	7.9%
1949 to 1949	5.4%
1939 or Before	29.5%
Median Year Built	1964

### Age Distribution

17 and younger	30.4%
18 to 24	8.2%
25 to 34	19.5%
35 to 44	17.2%
45 to 54	9.8%
55 to 64	6.1%
65 to 74	4.9%
75 and older	3.9%
Median Age	31.1

Median Home Value	\$34,000
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### Educational Attainment

Less than 9th Grade	9.0%
9th to 12th Grade	17.2%
High School Graduate	31.4%
Some College, No Degree	24.3%
Associate Degree	4.7%
Bachelor's Degree	8.5%
Graduate / Prof. Degree	4.9%

### Employment Status

In Labor Force	60.9%
Civilian	60.9%
Employed	55.2%
Unemployed	5.7%

### Employment By Industry

Agriculture/Forest/Fish	0.0%
Mining	0.0%
Construction	7.9%
Manufacture-Nondurable	0.0%
Manufacture-Durable	20.4%
Transportation	5.9%
Communication/Pub. Utility	2.9%
Wholesale Trade	6.5%
Retail Trade	22.6%
Finance/Insurance/RE	4.7%
Services	28.0%
Public Administration	1.1%

### Employment By Occupation

Managerial / Professional Spec	11.1%
Executive / Admin / Managerial	6.5%
Professional Specialty	4.6%
Technical / Sales / Admin Support	22.9%
Technician and Related	0.0%
Sales	7.0%
Administrative Support	16.0%
Service Occupation	19.5%
Private Household	1.2%
Protective Service	1.4%
Other Service	16.9%
Farming / Forestry / Fishery	2.9%
Precision / Craft / Repair	17.9%
Operator / Fabricator / Laborer	25.7%
Machine Op / Assembly / Inspector	10.5%
Transportation & Material Mover	7.0%
Laborers	8.2%

### Travel Time To Work

Less than 10 Minutes	17.2%
10 to 19 Minutes	51.4%
20 to 29 Minutes	20.3%
30 Minutes or More	11.1%
Distance to Missoula	

Source: U.S. Bureau of the Census, National Planning Data Corporation and Leland Consulting Group.

# COMMUNITY PROFILE

## LOLO, MONTANA

### Population and Households

	1980	1990	1993	1998	1980- 1990	1990- 1993	1993- 1998
Population	2,295	2,746	3,129	3,750	1.81%	4.45%	3.69%
Households	697	913	1,058	1,302	2.74%	5.04%	4.24%
Average Household Size	3.27	3.01	2.96	2.88			
Median Household Income	\$19,196	\$29,648	\$32,578	\$35,965			

### Age of Housing Stock

1989 to March	1.1%
1985 to 1988	10.6%
1980 to 1984	13.3%
1970 to 1979	56.4%
1960 to 1969	14.7%
1950 to 1959	1.1%
1949 to 1949	0.4%
1939 or Before	2.4%
Median Year Built	1976

### Age Distribution

17 and younger	35.5%
18 to 24	5.9%
25 to 34	16.4%
35 to 44	21.3%
45 to 54	10.4%
55 to 64	4.9%
65 to 74	3.8%
75 and older	2.0%
Median Age	30.4

Median Home Value	\$60,800
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### Educational Attainment

Less than 9th Grade	3.5%
9th to 12th Grade	8.9%
High School Graduate	39.8%
Some College, No Degree	23.8%
Associate Degree	4.4%
Bachelor's Degree	15.8%
Graduate / Prof. Degree	3.7%

### Employment Status

In Labor Force	73.9%
Civilian	73.7%
Employed	70.0%
Unemployed	3.8%

### Employment By Industry

Agriculture/Forest/Fish	2.5%
Mining	0.0%
Construction	6.4%
Manufacture-Nondurable	2.5%
Manufacture-Durable	9.6%
Transportation	6.4%
Communication/Pub. Utility	0.5%
Wholesale Trade	4.9%
Retail Trade	28.4%
Finance/Insurance/RE	5.9%
Services	31.7%
Public Administration	1.2%

### Employment By Occupation

Managerial / Professional Spec	19.7%
Executive / Admin / Managerial	12.4%
Professional Specialty	7.2%
Technical / Sales / Admin Support	39.7%
Technician and Related	1.7%
Sales	22.1%
Administrative Support	15.9%
Service Occupation	13.1%
Private Household	0.0%
Protective Service	0.7%
Other Service	12.4%
Farming / Forestry / Fishery	1.3%
Precision / Craft / Repair	11.4%
Operator / Fabricator / Laborer	14.8%
Machine Op / Assembly / Inspector	5.7%
Transportation & Material Mover	4.8%
Laborers	4.3%

### Travel Time To Work

Less than 10 Minutes	20.7%
10 to 19 Minutes	33.3%
20 to 29 Minutes	30.9%
30 Minutes or More	15.1%
Distance to Missoula	

Source: U.S. Bureau of the Census, National Planning Data Corporation and Leland Consulting Group.

# COMMUNITY PROFILE

## ORCHARD HOMES, MONTANA

### Population and Households

	1980	1990	1993	1998	1980- 1990	1990- 1993	1993- 1998
Population	10,344	10,317	10,744	11,322	-0.03%	1.36%	1.05%
Households	3,873	4,169	4,416	4,782	0.74%	1.94%	1.61%
Average Household Size	2.67	2.47	2.43	2.37			
Median Household Income	\$16,024	\$22,506	\$24,355	\$25,694			

### Age of Housing Stock

1989 to March 1990	0.9%
1985 to 1988	4.6%
1980 to 1984	7.7%
1970 to 1979	29.5%
1960 to 1969	26.0%
1950 to 1959	17.2%
1949 to 1949	6.9%
1939 or Before	7.2%
Median Year Built	1967

### Age Distribution

17 and younger	25.9%
18 to 24	10.2%
25 to 34	16.5%
35 to 44	17.2%
45 to 54	12.1%
55 to 64	7.4%
65 to 74	6.7%
75 and older	4.0%
Median Age	32.5

Median Home Value \$68,600

### Educational Attainment

Less than 9th Grade	6.2%
9th to 12th Grade	12.9%
High School Graduate	30.4%
Some College, No Degree	23.1%
Associate Degree	5.0%
Bachelor's Degree	16.6%
Graduate / Prof. Degree	5.7%

### Employment Status

In Labor Force	69.4%
Civilian	69.3%
Employed	63.6%
Unemployed	5.8%

### Employment By Industry

Agriculture/Forest/Fish	4.5%
Mining	0.4%
Construction	4.7%
Manufacture-Nondurable	4.9%
Manufacture-Durable	6.8%
Transportation	6.9%
Communication/Pub. Utility	1.2%
Wholesale Trade	3.6%
Retail Trade	25.1%
Finance/Insurance/RE	4.3%
Services	34.5%
Public Administration	3.1%

### Employment By Occupation

Managerial / Professional Spec	22.1%
Executive / Admin / Managerial	8.9%
Professional Specialty	13.2%
Technical / Sales / Admin Support	30.5%
Technician and Related	3.1%
Sales	12.5%
Administrative Support	14.9%
Service Occupation	17.5%
Private Household	0.5%
Protective Service	1.4%
Other Service	15.6%
Farming / Forestry / Fishery	2.2%
Precision / Craft / Repair	11.7%
Operator / Fabricator / Laborer	16.0%
Machine Op / Assembly / Inspector	6.3%
Transportation & Material Mover	3.6%
Laborers	6.2%

### Travel Time To Work

Less than 10 Minutes	26.3%
10 to 19 Minutes	53.2%
20 to 29 Minutes	14.4%
30 Minutes or More	6.1%
Distance to Missoula	

Source: U.S. Bureau of the Census, National Planning Data Corporation and Leland Consulting Group.

# COMMUNITY PROFILE

## MISSOULA, MONTANA

### Population and Households

	1980	1990	1993	1998	1980-1990	1990-1993	1993-1998
Population	43,204	42,918	44,942	47,999	-0.07%	1.55%	1.32%
Households	16,746	17,677	18,685	20,263	0.54%	1.87%	1.63%
Average Household Size	2.42	2.28	2.25	2.21			
Median Household Income	\$15,253	\$21,067	\$22,478	\$24,523			

### Age of Housing Stock

1989 to March 1990	0.5%
1985 to 1988	3.3%
1980 to 1984	7.2%
1970 to 1979	23.1%
1960 to 1969	15.9%
1950 to 1959	16.8%
1949 to 1949	11.0%
1939 or Before	22.1%
Median Year Built	1960

### Age Distribution

17 and younger	22.4%
18 to 24	16.6%
25 to 34	16.6%
35 to 44	16.5%
45 to 54	9.1%
55 to 64	6.0%
65 to 74	6.5%
75 and older	6.4%
Median Age	30.7

### Median Home Value

Median Home Value	\$63,800
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### Educational Attainment

Less than 9th Grade	4.9%
9th to 12th Grade	7.9%
High School Graduate	24.0%
Some College, No Degree	24.4%
Associate Degree	5.4%
Bachelor's Degree	22.4%
Graduate / Prof. Degree	11.0%

### Employment Status

In Labor Force	64.7%
Civilian	64.5%
Employed	59.4%
Unemployed	5.1%

### Employment By Industry

Agriculture/Forest/Fish	3.6%
Mining	0.2%
Construction	4.2%
Manufacture-Nondurable	2.9%
Manufacture-Durable	4.9%
Transportation	4.3%
Communication/Pub. Utility	1.9%
Wholesale Trade	4.1%
Retail Trade	21.3%
Finance/Insurance/RE	4.3%
Services	44.7%
Public Administration	3.6%

### Employment By Occupation

Managerial / Professional Spec	31.3%
Executive / Admin / Managerial	11.7%
Professional Specialty	19.6%
Technical / Sales / Admin Support	32.4%
Technician and Related	4.3%
Sales	13.4%
Administrative Support	14.7%
Service Occupation	17.2%
Private Household	0.4%
Protective Service	1.5%
Other Service	15.3%
Farming / Forestry / Fishery	1.7%
Precision / Craft / Repair	6.7%
Operator / Fabricator / Laborer	10.8%
Machine Op / Assembly / Inspector	3.4%
Transportation & Material Mover	4.0%
Laborers	3.4%

### Travel Time To Work

Less than 10 Minutes	34.7%
10 to 19 Minutes	49.5%
20 to 29 Minutes	9.2%
30 Minutes or More	6.6%

Source: U.S. Bureau of the Census, National Planning Data Corporation and Leland Consulting Group.

# MARKET ANALYSIS OF LAND USES

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# Land Use Analysis - Missoula Regional Planning Area

## Demand Potential and Development Timing

March 1994

Land Use Analyzed	Category	Estimated Total Market Demand City / County	Total Site Requirement Per Project	Land Unit Price	Development Timing **
Retail	Natl. Promotional Community / Specialty Convenience	100-110,000 SF / 215-275,000 SF 1 to 2 AC	5 to 15 AC 7 to 10 AC	\$3.00-\$6.00 / SF 0.5-2.0 AC	Phase I and II
Movie Theatre	Multi-Screen	8,500 SF / 20,200 SF	1 to 2 AC	\$4.00-\$6.00 / SF	Phase III
Industrial	Flex-Standard Incubator/Multi-Tenant Flex-Office/R&D Flex-Retail/Showroom	50,000-75,000 SF < 2.00 AC	6 to 8 AC	\$1.00-\$1.70 / SF	Phase I
Office	Service Commercial	90,000-115,000 SF	8 to 10 AC < 2.00 AC	\$2.00-\$5.00 / SF	Phase II
Restaurant	National Chain Regional Chain Local	15-20,000 SF / 35-40,000 SF 3-5 4-8	1 to 2 AC / 2 to 4 AC	\$5.00-\$7.00 / SF	Phase I and II
Hotel	Full-Service Limited-Service Business Boutique	Requires extensive research beyond the scope.	1 to 4 AC	\$4.00-\$8.00 / SF	Phase II

### \*\*Key:

Phase I: One to two years after infrastructure construction.

Phase II: Three to five years after infrastructure construction.

Phase III: Five or more years after infrastructure construction.

Source: Leland Consulting Group.



### SECTION III:

## BUSINESS LOCATION PROFILE

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### INTRODUCTION

A Business Location Profile Analysis is a method by which the subject market is compared to select other communities in its ability to both attract new industry and retain existing industry. As the experience of the past few years clearly indicates, the Missoula area economy does not operate in a vacuum, but rather reflects the significant impacts brought about by regional and national economic trends. Therefore, in order to better facilitate the Missoula area's efforts to identify new opportunities and improve industry retention efforts, it is important to first understand its comparative position and strengths and weaknesses as a business location.

The following discussion presents an overview of the business location profile analysis and methodology. Also presented is a discussion of Missoula's strengths and weaknesses along a continuum of factors important in corporate siting decisions.

### BUSINESS LOCATION PROFILE METHODOLOGY AND ANALYSIS

The first step in the analysis was to identify cities within the Rocky Mountain Region that are either currently, or have potential to compete with Missoula for economic development opportunities in the future. These cities were identified through discussions with private and public sector leaders in Missoula who share in the area's economic development efforts. In addition, cities were identified which have similar characteristics (i.e., size, economic base, etc.) as Missoula. Based on these criteria, the following list of ten selected cities (in addition to Missoula) was compiled for comparison:

- Boise, Idaho
- Couer D' Alene, Idaho
- Spokane, Washington
- Park City, Utah
- Salt Lake City, Utah
- Colorado Springs, Colorado
- Fort Collins, Colorado
- Albuquerque, New Mexico
- Flagstaff, Arizona

Once the list of potentially competitive cities was identified, data on each of the business location factors discussed above was collected for each city. Each of these factors is briefly described below:

**Labor Force Characteristics:** This category includes labor availability (number of unemployed workers), skill mix, average earnings, level of employee benefits, educational status (number of workers with high school/college education), labor relations and proximity to training facilities (colleges, vocational schools, etc.).

**Access to Markets/Resources:** This category includes geographic proximity to major retail and manufacturing markets and the availability of business support services.

**Transportation Linkages:** This category includes variables such as rail, truck and air service, measured by freight employment concentrations, interstate trucking concentrations and level of air freight and passenger activity.

**Utility Costs:** This category evaluates comparative water, sewer, electric and natural gas costs.

**Site/Building Costs:** This category evaluates comparative sale prices, lease rates and market conditions for industrial sites/buildings.

**State/Local Business Climate:** This category includes information on state/local tax structures, business climate/resource indices, worker's protection costs and the availability of higher education facilities.

**Quality of Life:** This category is based on assessments of several variables, including cost of living, housing costs, school system quality, recreational and cultural amenities, climate and environment, and safety/security factors.

A summary of the raw data for each of the cities compared, as well as the sources used in collecting the data is included in Table 1 and Table 2 at the end of this memorandum.

In comparing the cities outlined above, it is apparent that Missoula is more likely to be competitive with smaller cities (e.g., Boise, Couer D' Alene, Fort Collins and Flagstaff) and less likely to be competitive with cities such as Salt Lake City, Albuquerque, Colorado Springs and Spokane. Nonetheless, it is useful to compare Missoula to these larger cities to determine how Missoula "stacks up" against its larger competitors. Some characteristics of Missoula may also be complementary to those of these larger cities, thus providing opportunities for Missoula to attract businesses or industries which may be looking for attributes of a larger city in a smaller city environment.

In addition, it should be noted that many of the comparative indicators used in the analysis reflected state, as opposed to local figures, primarily due to data availability. Thus, our comparative analysis also reflects Montana's competitive position with respect to other Western States.

## BUSINESS LOCATION PROFILE RESULTS

Based on the comparison of cities described above, Missoula was evaluated for its strengths and weaknesses as a business location. The summary comments regarding these strengths and weaknesses are presented by business location category below. Following the discussion of each category are conclusions regarding the status of these factors as a strength, weakness or neutral factor for Missoula in terms of economic development. It should be noted that the comparison focuses both on Missoula's position relative to the smaller cities within the region, as well as its position relative to the larger metropolitan areas included in the analysis.

**Labor Force Characteristics:** Missoula's and Montana's labor force compares less favorably to other cities and states in the Rocky Mountain Region, particularly in terms of availability and skill mix. Because labor availability is a function of population density, Montana in general, and Missoula County in particular, do not have the concentrations of labor present in other more populated Western states and cities. In contrast, Missoula and Montana compare favorably to other cities/states in the region with respect to employee skill/education level and access to training facilities.

Conclusion: Competitive Weakness

**Access to Markets/Resources:** Perhaps Missoula's most significant competitive weakness relative to other cities in the region is its geographic isolation. With the exception of Boise, all of the other cities analyzed are located in closer proximity, and have better access, to major retail and manufacturing markets. Again, this is a competitive weakness shared by the entire State.

Conclusion: Competitive Weakness

**Transportation Linkages:** Relative to other cities of comparable size, Missoula appears to offer superior rail and truck transportation linkages. Even when compared to larger cities such as Salt Lake City, Albuquerque and Colorado Springs, Missoula's rail and truck service represents a competitive strength. This strength is primarily due to Missoula's extensive rail facilities, including a major switching yard and the headquarters office for Montana Rail Link as well as its existing concentration of trucking firms which take advantage of the area's access to Interstate 90. In addition, its air service compares favorably with smaller cities in the region. While

the importance of these factors will likely be determined by the type of user considering Missoula as a business location, the high level of transportation service in Missoula will likely help to ease users' concerns over its geographic isolation.

**Conclusion: Competitive Strength**

**Utility Costs:**

Missoula compares favorably with other cities in the region on the cost of utilities (water, sewer, electric & gas). Although some cities have ownership and control of their utilities (i.e., Colorado Springs), it does not appear to result in a significant cost advantage. However, these cities could potentially offer new businesses or industries greater flexibility in determining utility rates.

**Conclusion: Neutral Factor**

**Site/Building Costs:**

Real estate costs, particularly for industrial users, appear to be relatively uniform across the markets analyzed. The advantage that larger markets (i.e., Salt Lake City, Colorado Springs, Spokane and Albuquerque) have over markets such as Missoula is the availability of a wider range of property types. This advantage, in turn, provides these markets with greater flexibility in attracting relocating businesses.

**Conclusion: Neutral Factor**

**State/Local Business Climate:** Missoula and Montana do not compare favorably with other cities/states in the region, relative to their state tax structure. However, in terms of overall business climate and resources, Missoula and Montana compare more favorably.

**Conclusion: Competitive Weakness**

**Quality of Life:**

Measuring quality of life is difficult in that it relies, to a great degree, on subjectivity. Some indicators, however, are useful in providing guidelines as to an area's ability to provide adequate community services. For this reason, indicators such as cost of living, housing costs, school expenditures, and crime rates are used as somewhat quantifiable measures of quality of life. More subjective measures are used to evaluate an area's climate or environment.

Based on these measures, Missoula appears to compare favorably to other cities in the region, regardless of its size. Missoula's crime rate and housing costs are lower than any of the other cities analyzed, and there appears to be a higher financial commitment to education than in most other cities/states. Missoula's only apparent competitive disadvantage with regard to quality of life is its somewhat colder climate. However, the area's abundant recreational amenities, many of which take advantage of a colder climate, are more than sufficient to overcome this disadvantage.

Conclusion: Competitive Strength

## CONCLUSION

In conclusion, the Missoula area appears to compare less favorably to larger cities in the Rocky Mountain Region, particularly with respect to labor force characteristics and access to markets/resources. Missoula's relatively poor access to markets is partially overcome by the area's generally superior transportation service. Montana's state tax structure, which has a profound impact on Missoula economic development efforts, also appears to put it at a competitive disadvantage relative to other Western states.

In contrast, businesses locating in the Missoula area will have the advantages of a highly educated work force, competitive utility rates and real estate costs, and a superior quality of life. The Missoula Airport Development Park also represents a potential competitive advantage, particularly due to its proposed size and the fact that its development will be carefully controlled by the County.

Unweighted summary rankings of the competitive cities are presented in Table 3 which follows this memorandum. Table 4 presents an additional comparative analysis of Missoula with only the smaller competitive cities. In addition, to further refine the business location profile, these summary rankings were weighted to reflect the importance of each location indicator to users of various types of industrial facilities. Summary Tables 5 through 10 for each of six facility types (administrative headquarters, light manufacturing, high technology, research and development, information processing and international) are presented following the unweighted summary ranking tables. Table 11 summarizes the rankings of the competitive cities by facility type.

## MONTANA CITIES COMPARATIVE ANALYSIS

As a supplement to the business location profile, an analysis comparing Missoula to other Montana cities was conducted utilizing a limited number of business location factors. Montana cities chosen for comparative purposes included: Bozeman, Billings, Butte, Great Falls and Kalispell.

Table 12 summarizes the unweighted rankings of Missoula and the competitive Montana cities. The table below summarizes Missoula's competitive position relative to the other Montana cities with respect to various business location factors.

**Montana Cities Comparative Analysis  
Missoula Competitive Advantages/Disadvantages**

<u>Location Factor</u>	<u>Advantage</u>	<u>Disadvantage</u>	<u>Neutral Factor</u>
Labor	X		
Access to Markets	X		
Transportation			X
State/Local Business Climate			X
Quality of Life			X

Source: Leland Consulting Group

# **BUSINESS LOCATION PROFILE TABLES**

**BUSINESS LOCATION PROFILE**
**Table 1**
**Raw Data By Location Factor**
**January 1994**

Location Factor	Missoula, MT	Boise, ID	Couder D' Alene, ID	Spokane, WA	Park City, UT	Salt Lake City, UT	Colorado Springs, CO	Fort Collins, CO	Albuquerque, NM	Flagstaff, AZ
<b>LABOR:</b>										
Availability										
# Unemployed Production Workers (000s)	11	14	14	72	12	12	26	26	14	33
# Unemployed Clerical Workers (000s)	2	4	4	25	5	5	14	14	6	14
# Unemployed Professional/Technical Workers (000s)	2	4	4	24	6	6	19	19	7	29
Skill Mix										
% Production Employees	21.6%	29.5%	29.5%	22.1%	24.9%	24.9%	21.7%	21.7%	21.2%	21.1%
% Clerical Employees	14.1%	13.6%	13.6%	16.0%	17.1%	17.1%	16.6%	16.6%	14.8%	17.1%
Wages										
Average Weekly Earnings-Production Workers	\$466.26	\$491.56	\$491.56	\$558.73	\$446.95	\$462.35	\$492.38	\$492.38	\$416.64	\$451.13
Fringe Benefits										
Fringe Benefits' Share of Payroll	39.3%	39.3%	39.3%	39.3%	39.3%	39.3%	39.3%	39.3%	39.3%	39.3%
Educational Attainment										
% High School Graduates	85.4%	87.2%	81.1%	84.4%	85.6%	85.6%	88.3%	88.6%	82.1%	79.0%
% College Graduates	27.7%	24.9%	16.0%	20.6%	22.9%	22.9%	25.8%	32.3%	26.7%	24.6%
Labor Relations										
% of Workers Unionized (National Rank)	36	8	8	40	5	5	14	14	13	3
Technical Training Resources										
# of Education/Training Facilities in Area	2	3	1	7	0	7	9	2	4	1
<b>ACCESS TO MARKETS/RESOURCES:</b>										
Consumer Markets										
Distance to Major Retail Market (\$2 Billion +)	205	275	33	0	37	0	0	62	0	139
Intermediate Manufacturing Production										
Total Manufacturing Production in Contiguous States Shipments/Receipts (\$Million)	\$71,366	\$233,276	\$233,276	\$162,812	\$166,151	\$166,151	\$243,356	\$243,356	\$563,259	\$718,086
Business/Technical Services										
% Business Service Employees	5.6%	4.7%	4.7%	3.9%	5.5%	5.5%	5.9%	5.9%	4.2%	5.7%
<b>TRANSPORTATION:</b>										
Rail Service (Employment)										
Total Rail Freight Employees	14	12	12	447	22	22	409	409	63	166
Rail Service (Tonnage)										
Total Rail Shipments (000s)	4,057	9,160	9,160	24,878	5,418	5,418	2,510	2,510	1,930	1,614
Rail Service (Qualitative)										
Quality of Rail Service (Rank)	2	7	8	5	9	1	3	6	3	4
Truck Service										
Total Licensed Interstate Trucks	19,000	13,600	13,600	40,000	45,000	45,000	19,100	19,100	20,000	28,600
Total Licensed Interstate Carriers	1,000	2,100	2,100	3,500	2,500	2,500	2,000	2,000	2,000	3,000
Air Service (Freight)										
Enplaned Revenue Tons	292	3,264	335	8,552	0	38,157	527	0	7,594	186
Air Service (Passengers)										
Per Capita Enplaned Passengers	2.10	3.16	1.45	2.56	0.00	11.64	1.75	0.00	10.28	0.42
Annual No. of Scheduled Departures	6,744	21,158	3,766	31,215	0	79,929	12,393	0	36,679	2,551
No. of Major Airlines Represented	2	2	3	5	0	5	4	0	5	1



**BUSINESS LOCATION PROFILE**

Table 1  
Raw Data By Location Factor  
January 1994

Location Factor	Missoula, MT	Boise, ID	Coeur D' Alene, ID	Spokane, WA	Park City, UT	Salt Lake City, UT	Colorado Springs, CO	Fort Collins, CO	Albuquerque, NM	Flagstaff, AZ
<b>UTILITIES:</b>										
Electric Power Cost										
Avg. electricity cost (\$/Million BTUs)	\$12.00	\$11.10	\$11.10	\$10.34	\$17.10	\$17.10	\$17.48	\$17.48	\$21.55	\$22.10
Natural Gas Cost										
Avg. natural gas cost (\$/Thousand Cubic Feet)	\$3.27	\$2.72	\$2.72	\$2.72	\$3.62	\$3.62	\$2.78	\$2.78	\$3.69	\$3.71
Water/Sewer Cost										
Water										
Monthly Charge (Industrial User)	\$57.85	\$25.74	\$25.30	\$21.24	\$102.00	\$28.15	\$4.50	\$64.44	\$42.41	\$12.80
Commodity Charge (\$/Hundred Cubic Feet)	\$0.71	\$0.67	\$0.38	\$0.51	\$1.02	\$0.43	\$1.02	\$0.74	\$0.59	\$2.08
Sewer										
Monthly Charge (Industrial User)	\$5.70	\$2.31	\$0.00	\$9.62	\$40.00	\$0.00	\$6.90	\$23.82	\$74.38	\$0.00
Commodity Charge (\$/Hundred Cubic Feet)	\$0.60	\$1.32	\$1.90	\$0.92	\$0.00	\$0.50	\$0.49	\$1.07	\$0.57	\$1.68
<b>SITES/BUILDINGS:</b>										
Site Cost										
Industrial land sale price range (\$/SF)	\$1.25	\$1.00	\$1.00	\$0.25	\$1.50	\$0.35	\$1.00	\$0.50	\$2.50	\$1.50
Building Availability/Quality	\$4.00	\$2.75	\$4.00	\$0.90	\$2.00	\$2.00	\$3.00	\$3.50	\$4.00	\$3.50
Marketwide Vacancy Rate	1.0%	3.0%	1.0%	6.5%	2.0%	7.6%	8.2%	5.0%	9.0%	5.0%
Building Cost										
Avg. industrial lease rates (\$/SF):										
Warehouse/Distribution:	\$3.00	\$3.60	\$3.00	\$4.80	\$3.00	\$3.25	\$3.50	\$3.00	\$3.25	\$3.00
Office/Warehouse:	\$5.00	\$4.80	\$4.00	\$9.00	\$6.30	\$5.50	\$5.50	\$5.50	\$5.50	\$4.20
High Tech/R&D:	\$7.00	\$8.40	\$8.00	\$10.20	\$10.00	\$7.20	\$8.50	\$8.00	\$7.00	\$5.50
<b>STATE/LOCAL BUSINESS CLIMATE:</b>										
State Business Taxes										
Per Capita Corporate Income Taxes	\$87	\$57	\$57	\$0	\$47	\$47	\$34	\$34	\$32	\$51
% of Personal Income	0.6%	0.4%	0.4%	0.0%	0.3%	0.3%	0.2%	0.2%	0.2%	0.3%
Local Property Taxes										
Per Capita Property Taxes	\$524	\$426	\$426	\$626	\$416	\$416	\$690	\$690	\$222	\$662
% of Personal Income	3.6%	2.9%	2.9%	3.4%	3.0%	3.0%	3.8%	3.8%	1.6%	4.2%
Personal Taxes										
Per Capita Individual Income Taxes	\$350	\$429	\$429	\$0	\$404	\$404	\$434	\$434	\$239	\$332
% of Personal Income	2.4%	2.9%	2.9%	0.0%	2.9%	2.9%	2.4%	2.4%	1.7%	2.1%
State Personal Income Tax Rate (Highest Rate)	11.0%	8.2%	8.2%	0.0%	7.2%	7.2%	5.0%	5.0%	8.5%	7.0%
Business Climate/Resources										
Development Capacity Index (Rank)	26	26	26	3	2	2	4	4	35	13
Business Vitality Index (Rank)	8	7	7	33	22	22	4	4	3	49
Workers' Protection Costs										
Avg. Annual Unemploy. Benefits/Worker	\$150.26	\$205.49	\$205.49	\$231.90	\$132.02	\$132.02	\$151.86	\$151.86	\$146.75	\$101.60
Avg. Workers' Comp./\$100 Payroll (Index: Natl. Avg. = 100)										
Index Factor (Natl. Avg. = 1.000)	1.310	0.913	0.913	1.275	0.474	0.474	1.499	1.499	1.395	1.084
Higher Education Availability										
# of Facilities in Area	2	3	1	7	0	7	9	2	4	1
<b>FINANCIAL RESOURCES:</b>										
Traditional Financing										
Per Capital Assets	\$8,817	\$8,222	\$8,222	\$7,820	\$6,976	\$6,976	\$7,899	\$7,899	\$7,081	\$7,213

**BUSINESS LOCATION PROFILE**
**Table 1**
**Raw Data By Location Factor**
**January 1994**

Location Factor	Missoula, MT	Boise, ID	Coeur D' Alene, ID	Spokane, WA	Park City, UT	Salt Lake City, UT	Colorado Springs, CO	Fort Collins, CO	Albuquerque, NM	Flagstaff, AZ
<b>QUALITY OF LIFE:</b>										
Cost of Living										
Index Factor (National Average: 100.0)	102.8	103.2	103.7	103.7	100.2	100.2	97.7	99.7	101.2	104.6
Housing Cost										
Median Home Price	\$102,232	\$119,297	\$135,246	\$135,246	\$120,667	\$120,667	\$113,500	\$122,036	\$121,610	\$125,628
Education										
School Expenditures Per Pupil	\$4,683	\$3,918	\$3,236	\$4,499	\$2,908	\$3,651	\$4,527	\$5,122	\$4,223	\$4,874 *
Recreation/Culture										
Market Area Ranking	61	74	50	50	51	51	72	17	33	101
Climate/Environment										
Market Area Ranking	136	116	131	131	81	81	125	127	93	67
Personal Safety										
Market Area Ranking	15	80	65	65	39	39	111	84	149	131
Crime Rate										
Violent Crimes/100,000 Pop.	169.9	281.4	281.4	534.5	290.5	290.5	578.8	578.8	964.9	670.8

**Source: Leland Consulting Group**

**BUSINESS LOCATION PROFILE****Table 2****Summary of Location Factors****January 1994**

Location Factors	Source(s)	Indicator	High/Low Beneficial
<b>LABOR</b>			
Availability: Production Clerical Professional/Technical	Geographic Profile of Employment & Unemployment, 1992	Number of unemployed workers	High
Skill Mix: Production Clerical Professional/Technical	Geographic Profile of Employment & Unemployment, 1992	% of employees in production, clerical and professional/ technical positions	High
Wages: Production	Employment and Earnings, Bureau of Labor Statistics, 1993	Average weekly earnings	Low
Fringe Benefits	U.S. Chamber of Commerce, 1992 Employee Benefits Survey	Employee benefits as a % of total payroll	Low
Educational Attainment	U.S. Census Bureau, Selected Social Characteristics, 1990	% high school graduates % college graduates	High
Labor Relations	Grant Thornton Manufacturing Climates Study, 1990	% unionized manufacturing employment	Low
Technical Training Resources	1992 Higher Education Directory	# of education/training facilities in market area	High

## BUSINESS LOCATION PROFILE

Table 2

Summary of Location Factors

January 1994

Location Factors	Source(s)	Indicator	High/Low Beneficial
<b>ACCESS TO MARKETS/RESOURCES</b>			
Consumer Markets	Sales & Marketing Management, Survey of Buying Power, 1992	Distance to major retail center	Low
Intermediate Manufacturing Production	Sales & Marketing Management, Survey of Industrial and Commercial Buying Power, 1987	Total manufacturing production for contiguous states	High
Business/Technical Services	Employment, Hours and Earnings, Bureau of Labor Statistics, 1992	% business services (SIC 73) employment	High
<b>TRANSPORTATION</b>			
Rail Service	1987 Census of Transportation	No. of employees in freight forwarding industries	High
Truck Service	State Motor Carrier Departments	No. of vehicles/carriers licensed for interstate transportation	High
Air Service (Freight)	1991 FAA Airport Activity Survey	Enplaned revenue tons-freight	High
Air Service (Passenger)	1991 FAA Airport Activity Survey	Total enplanements per 100,000 pop.	High
		No. of major airlines represented	High
		No. of scheduled departures	High

**BUSINESS LOCATION PROFILE****Table 2****Summary of Location Factors****January 1994**

Location Factors	Source(s)	Indicator	High/Low Beneficial
<b>UTILITIES</b>			
Electric Power Cost	Energy Information Administration, State Energy Price and Expenditure Report, 1989	Average electricity prices (Dollars per Million Btu)	Low
Natural Gas Cost	Energy Information Administration, Natural Gas Annual 1990	Average price of natural gas delivered to industrial consumers (Dollars per Thousand Cubic Feet)	Low
Water and Sewer Cost	Market area water/sewer departments	Industrial water/sewer rates	Low
<b>SITES</b>			
Cost	Real estate brokers in competitive market areas	Industrial site sale prices/SF	Low
<b>BUILDINGS</b>			
Availability/Quality	Real estate brokers in competitive market areas	Industrial vacancy rates/market conditions	High
Cost	Real estate brokers in competitive market areas	Industrial lease rates	Low

# BUSINESS LOCATION PROFILE

Table 2

Summary of Location Factors

January 1994

Location Factors	Source(s)	Indicator	High/Low Beneficial
<b>STATE/LOCAL BUSINESS CLIMATE</b>			
State Business Taxes	Advisory Commission on Intergovernmental Relations: 1993 Significant Features of Fiscal Federalism	Per capita corporate income taxes % of personal income	Low Low
Local Property Taxes	Advisory Commission on Intergovernmental Relations: 1993 Significant Features of Fiscal Federalism	Per capita property taxes % of personal income	Low Low
Personal Taxes	Advisory Commission on Intergovernmental Relations: 1993 Significant Features of Fiscal Federalism	Per capita individual income taxes % of personal income	Low Low
	Prentice Hall - 1992 All States Tax Guide	State personal income tax rate	Low
Business Climate/Resources	Corporation for Enterprise Development: The 1993 Development Report Card for the States	Development Capacity Index (Rank) Business Vitality Index (Rank)	Low Low
Worker's Protection Costs	Grant Thornton Manufacturing Climates Study, 1990	Average unemployment compensation benefits per worker per year	Low
		Average workers' compensation insurance level per \$100 payroll rankings	Low
Higher Education Availability	1992 Higher Education Directory	Number of institutions in market area	High

**BUSINESS LOCATION PROFILE****Table 2****Summary of Location Factors**

January 1994

Location Factors	Source(s)	Indicator	High/Low Beneficial
<b>FINANCIAL RESOURCES</b>			
Traditional Financing	State and Metropolitan Area Data Book 1991	Per capita assets by state	High
<b>QUALITY OF LIFE</b>			
Cost of Living	American Chamber of Commerce Research Association, Cost of Living Index, Second Quarter 1993	Cost of living index	Low
Housing Cost	American Chamber of Commerce Research Association, Cost of Living Index, Second Quarter 1993	Median home prices	Low
Education	U.S. Dept. of Commerce, Public Education Finances: 1989-90	Elementary and Secondary school expenditures per pupil	High
Recreation/Culture	Prentice Hall: Retirement Places Rated Almanac, 1990	Market area rankings	Low
Climate/Environment	Prentice Hall: Retirement Places Rated Almanac, 1990	Market area rankings	Low
Personal Safety	Prentice Hall: Retirement Places Rated Almanac, 1990	Market area rankings	Low
	U.S. Dept. of Justice, Federal Bureau of Investigation 1992 Crime Rate Data	Violent Crimes/100,000 population	Low

Source: Leland Consulting Group

**BUSINESS LOCATION PROFILE**  
**Table 3**  
**Summary Rankings (Unweighted)**

	MISSOULA MT Ranking	BOISE ID Ranking	COUER D'ALENE ID Ranking	SPOKANE WA Ranking	SALT LAKE CITY UT Ranking	PARK CITY UT Ranking	COLO. SPGS. CO Ranking	FORT COLLINS CO Ranking	ALBUQUERQUE NM Ranking	FLAGSTAFF AZ Ranking
<b>LABOR</b>										
Availability										
Production	6	4	4	1	5	5	3	3	4	2
Clerical	6	5	5	1	4	4	2	2	3	2
Professional/Technical	7	6	6	2	5	5	3	3	4	1
Skill Mix	5	3	3	3	1	1	3	3	5	4
Wages (Production)	5	6	6	8	4	2	7	7	1	3
Fringe Benefits	1	1	1	1	1	1	1	1	1	1
School Years Completed	3	4	8	7	5	5	3	1	5	7
Labor Relations	6	3	3	7	2	2	5	5	4	1
Technical Training Resources	5	4	6	2	2	7	1	5	3	6
Subtotal	44	36	42	32	29	32	28	30	30	27
<b>ACCESS TO MARKETS/RESOURCES</b>										
Geographic Proximity	9	10	6	3	1	5	4	7	2	8
Intermediate Manufacturing										
Production	7	4	4	6	5	5	3	3	2	1
Business/Technical Services	3	5	5	7	4	4	1	1	6	2
Subtotal	19	19	15	16	10	14	8	11	10	11
<b>TRANSPORTATION</b>										
Rail Service	2	7	8	5	1	9	3	6	3	4
Truck Service	1	7	7	3	2	2	4	4	6	5
Air Service (freight)	7	4	6	2	1	9	5	9	3	8
Air Service (Passengers)	6	4	7	3	1	9	5	9	2	8
Subtotal	16	22	28	13	5	29	17	28	14	25
<b>UTILITIES</b>										
Electric Power Cost	3	2	2	1	4	4	5	5	6	7
Natural Gas Cost	3	1	1	1	4	4	2	2	5	6
Water and Sewer Cost	7	5	3	4	1	9	2	10	8	6
Subtotal	13	8	6	6	9	17	9	17	19	19



**BUSINESS LOCATION PROFILE**  
**Table 3**  
**Summary Rankings (Unweighted)**

	MISSOULA	BOISE	COUER D' ALENE	SPOKANE	SALT LAKE CITY	PARK CITY	COLO. SPGS.	FORT COLLINS	ALBUQUERQUE	FLAGSTAFF
	MT	ID	ID	WA	UT	UT	CO	CO	NM	AZ
	Ranking	Ranking	Ranking	Ranking	Ranking	Ranking	Ranking	Ranking	Ranking	Ranking
<b>SITES</b>										
Cost	8	4	8	1	6	2	5	3	9	7
Subtotal	8	4	8	1	6	2	5	3	9	7
<b>BUILDINGS</b>										
Availability/Quality	8	6	8	4	7	3	2	5	1	5
Cost	3	5	4	7	6	2	5	4	2	1
Subtotal	11	11	12	11	13	5	7	9	3	6
<b>STATE/LOCAL BUSINESS CLIMATE</b>										
State Business Taxes	7	6	6	1	4	4	3	3	2	5
Local Property Taxes	3	2	2	3	2	2	4	4	1	4
Personal Taxes	5	5	5	1	4	4	3	3	3	2
Business Incentives	4	3	3	5	2	2	1	1	6	7
Workers Protection Costs	4	3	3	5	1	1	6	6	4	2
Higher Education Quality	5	4	6	2	2	7	1	5	3	6
Subtotal	28	23	25	17	15	20	18	22	19	26
<b>FINANCIAL RESOURCES</b>										
Traditional Financing	1	2	2	4	7	7	3	3	6	5
Subtotal	1	2	2	4	7	7	3	3	6	5
<b>QUALITY OF LIFE</b>										
Cost of Living	5	6	7	7	3	3	1	2	4	8
Housing Cost	1	3	8	8	4	4	2	6	5	7
Education	3	7	9	5	8	10	4	1	6	2
Recreation/Culture	5	7	3	3	4	4	6	1	2	8
Climate/Environment	8	4	7	7	2	2	5	6	3	1
Safety	1	3	2	4	2	2	6	5	8	7
Subtotal	23	30	36	34	23	25	24	21	28	33
<b>TOTAL</b>	<b>163</b>	<b>155</b>	<b>174</b>	<b>134</b>	<b>117</b>	<b>151</b>	<b>119</b>	<b>144</b>	<b>138</b>	<b>159</b>
	=====	=====	=====	=====	=====	=====	=====	=====	=====	=====

NOTE: Lower scores indicate a stronger competitive position with regard to a particular industry group.

SOURCE: Leland Consulting Group

# **BUSINESS LOCATION PROFILE**

**Table 4**

**Summary Rankings (Unweighted)**

	MISSOULA	BOISE	COUER D' ALENE	FORT COLLINS	FLAGSTAFF
	MT	ID	ID	CO	AZ
	Ranking	Ranking	Ranking	Ranking	Ranking
<b>LABOR</b>					
Availability					
Production	4	3	3	2	1
Clerical	4	2	2	1	1
Professional/Technical	4	3	3	2	1
Skill Mix	3	1	1	1	2
Wages (Production)	2	3	3	4	1
Fringe Benefits	1	1	1	1	1
School Years Completed	2	3	5	1	4
Labor Relations	4	2	2	3	1
Technical Training					
Resources	2	1	3	2	3
Subtotal	26	19	23	17	15
<b>ACCESS TO MARKETS/RESOURCES</b>					
Geographic Proximity	4	5	1	2	3
Intermediate Manufacturing					
Production	4	3	3	2	1
Business/Technical Services	3	4	4	1	2
Subtotal	11	12	8	5	6
<b>TRANSPORTATION</b>					
Rail Service	1	4	5	3	2
Truck Service	1	4	4	2	3
Air Service (freight)	3	1	2	5	4
Air Service (Passengers)	2	1	3	5	4
Subtotal	7	10	14	15	13
<b>UTILITIES</b>					
Electric Power Cost	2	1	1	3	4
Natural Gas Cost	3	1	1	2	4
Water and Sewer Cost	4	2	1	5	3
Subtotal	9	4	3	10	11

**BUSINESS LOCATION PROFILE**  
**Table 4**  
**Summary Rankings (Unweighted)**

	MISSOULA MT Ranking	BOISE ID Ranking	COUER D' ALENE ID Ranking	FORT COLLINS CO Ranking	FLAGSTAFF AZ Ranking
<b>SITES</b>					
Cost	4	2	4	1	3
Subtotal	4	2	4	1	3
<b>BUILDINGS</b>					
Availability/Quality	3	2	3	1	1
Cost	2	4	3	3	1
Subtotal	5	6	6	4	2
<b>STATE/LOCAL BUSINESS CLIMATE</b>					
State Business Taxes	4	3	3	1	2
Local Property Taxes	2	1	1	3	3
Personal Taxes	3	3	3	2	1
Business Incentives	3	2	2	1	4
Workers Protection Costs	3	2	2	4	1
Higher Education Quality	2	1	3	2	3
Subtotal	17	12	14	13	14
<b>FINANCIAL RESOURCES</b>					
Traditional Financing	1	2	2	3	4
Subtotal	1	2	2	3	4
<b>QUALITY OF LIFE</b>					
Cost of Living	2	3	4	1	5
Housing Cost	1	2	5	3	4
Education	3	4	5	1	2
Recreation/Culture	3	4	2	1	5
Climate/Environment	5	2	4	3	1
Safety	1	3	2	4	5
Subtotal	15	18	22	13	22
<b>TOTAL</b>	<b>95</b>	<b>85</b>	<b>96</b>	<b>81</b>	<b>90</b>

NOTE: Lower scores indicate a stronger competitive position with regard to a particular industry group.

SOURCE: Leland Consulting Group

## BUSINESS LOCATION PROFILE

Table 5

Facility Type: Administrative Headquarters

## ADMINISTRATIVE HEADQUARTERS

	MISSOULA, MT			BOISE, ID			COUER D' ALENE, ID			SPOKANE, WA			SALT LAKE CITY, UT			PARK CITY, UT			COLORADO SPRINGS, CO			FORT COLLINS, CO			ALBUQUERQUE, NM			FLAGSTAFF, AZ		
	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total
<b>LABOR</b>																														
Availability																														
Production	0	6	0	0	4	0	0	4	0	0	1	0	0	5	0	0	5	0	0	3	0	0	3	0	0	4	0	0	2	0
Clerical	3	6	18	3	5	15	3	5	15	3	1	3	3	4	12	3	4	12	3	2	6	3	2	6	3	3	9	3	2	6
Professional/Technical	5	7	35	5	6	30	5	6	30	5	2	10	5	5	25	5	5	25	5	3	15	5	3	15	5	4	20	5	1	5
Skill Mix	2	5	10	2	3	6	2	3	6	2	3	6	2	1	2	2	1	2	2	3	6	2	3	6	2	5	10	2	4	8
Wages (Production)	0	5	0	0	6	0	0	6	0	0	8	0	0	4	0	0	2	0	0	7	0	0	7	0	0	1	0	0	3	0
Fringe Benefits	2	1	2	2	1	2	2	1	2	2	1	2	2	1	2	2	1	2	2	1	2	2	1	2	2	1	2	2	1	2
School Years Completed	1	3	3	1	4	4	1	8	8	1	7	7	1	5	5	1	5	5	1	3	3	1	1	1	1	5	5	1	7	7
Labor Relations	1	6	6	1	3	3	1	3	3	1	7	7	1	2	2	1	2	2	1	5	5	1	5	5	1	4	4	1	1	1
Technical Training Resources	1	5	5	1	4	4	1	6	6	1	2	2	1	2	2	1	7	7	1	1	1	1	5	5	1	3	3	1	6	6
Subtotal	15	44	79	15	36	64	15	42	70	15	32	37	15	29	50	15	32	55	15	28	38	15	30	40	15	30	53	15	27	35
<b>ACCESS TO MARKETS/RESOURCES</b>																														
Geographic Proximity	3	9	27	3	10	30	3	6	18	3	3	9	3	1	3	3	5	15	3	4	12	3	7	21	3	2	6	3	8	24
Intermediate Manufacturing																														
Production	0	7	0	0	4	0	0	4	0	0	6	0	0	5	0	0	5	0	0	3	0	0	3	0	0	2	0	0	1	0
Business/Technical Services	5	3	15	5	5	25	5	5	25	5	7	35	5	4	20	5	4	20	5	1	5	5	1	5	5	6	30	5	2	10
Subtotal	8	19	42	8	19	55	8	15	43	8	16	44	8	10	23	8	14	35	8	8	17	8	11	26	8	10	36	8	11	34
<b>TRANSPORTATION</b>																														
Rail Service	0	2	0	0	7	0	0	8	0	0	5	0	0	1	0	0	9	0	0	3	0	0	6	0	0	3	0	0	4	0
Truck Service	0	1	0	0	7	0	0	7	0	0	3	0	0	2	0	0	2	0	0	4	0	0	4	0	0	6	0	0	5	0
Air Service (freight)	1	7	7	1	4	4	1	6	6	1	2	2	1	1	1	1	9	9	1	5	5	1	9	9	1	3	3	1	8	8
Air Service (Passengers)	5	6	30	5	4	20	5	7	35	5	3	15	5	1	5	5	9	45	5	5	25	5	9	45	5	2	10	5	8	40
Subtotal	6	16	37	6	22	24	6	28	41	6	13	17	6	5	6	6	29	54	6	17	30	6	28	54	6	14	13	6	25	48
<b>UTILITIES</b>																														
Electric Power Cost	1	3	3	1	2	2	1	2	2	1	1	1	1	4	4	1	4	4	1	5	5	1	5	5	1	6	6	1	7	7
Natural Gas Cost	1	3	3	1	1	1	1	1	1	1	1	1	1	4	4	1	4	4	1	2	2	1	2	2	1	5	5	1	6	6
Water and Sewer Cost	1	7	7	1	5	5	1	3	3	1	4	4	1	1	1	1	9	9	1	2	2	1	10	10	1	8	8	1	6	6
Subtotal	3	13	13	3	8	8	3	6	6	3	6	6	3	9	9	3	17	17	3	9	9	3	17	17	3	19	19	3	19	19

**BUSINESS LOCATION PROFILE**
**Table 5**
**Facility Type: Administrative Headquarters**
**ADMINISTRATIVE HEADQUARTERS**

	MISSOULA, MT			BOISE, ID			COUER D' ALENE, ID			SPOKANE, WA			SALT LAKE CITY, UT			PARK CITY, UT			COLORADO SPRINGS, CO			FORT COLLINS, CO			ALBUQUERQUE, NM			FLAGSTAFF, AZ		
	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total
SITES																														
Cost	2	8	16	2	4	8	2	8	16	2	1	2	2	6	12	2	2	4	2	5	10	2	3	6	2	9	18	2	7	14
Subtotal	2	8	16	2	4	8	2	8	16	2	1	2	2	6	12	2	2	4	2	5	10	2	3	6	2	9	18	2	7	14
BUILDINGS																														
Availability/Quality	5	8	40	5	6	30	5	8	40	5	4	20	5	7	35	5	3	15	5	2	10	5	5	25	5	1	5	5	5	25
Cost	2	3	6	2	5	10	2	4	8	2	7	14	2	6	12	2	2	4	2	5	10	2	4	8	2	2	4	2	1	2
Subtotal	7	11	46	7	11	40	7	12	48	7	11	34	7	13	47	7	5	19	7	7	20	7	9	33	7	3	9	7	6	27
STATE/LOCAL BUSINESS CLIMATE																														
State Business Taxes	4	7	28	4	6	24	4	6	24	4	1	4	4	4	16	4	4	16	4	3	12	4	3	12	4	2	8	4	5	20
Local Property Taxes	2	3	6	2	2	4	2	2	4	2	3	6	2	2	4	2	2	4	2	4	8	2	4	8	2	1	2	2	4	8
Personal Taxes	5	5	25	5	5	25	5	5	25	5	1	5	5	4	20	5	2	10	5	3	15	5	3	15	5	3	15	5	2	10
Business Incentives	1	4	4	1	3	3	1	3	3	1	5	5	1	2	2	1	4	4	1	1	1	1	1	1	1	6	6	1	7	7
Workers Protection Costs	1	4	4	1	3	3	1	3	3	1	5	5	1	1	1	1	1	1	1	6	6	1	6	6	1	4	4	1	2	2
Higher Education Quality	4	5	20	4	4	16	4	6	24	4	2	8	4	2	8	4	7	28	4	1	4	4	5	20	4	3	12	4	6	24
Subtotal	17	28	87	17	23	75	17	25	83	17	17	33	17	15	51	17	20	63	17	18	46	17	22	62	17	19	47	17	26	71
FINANCIAL RESOURCES																														
Traditional Financing	3	1	3	3	2	6	3	2	6	3	4	12	3	7	21	3	7	21	3	3	9	3	3	9	3	6	18	3	5	15
Subtotal	3	1	3	3	2	6	3	2	6	3	4	12	3	7	21	3	7	21	3	3	9	3	3	9	3	6	18	3	5	15
QUALITY OF LIFE																														
Cost of Living	4	5	20	4	6	24	4	7	28	4	7	28	4	3	12	4	3	12	4	1	4	4	2	8	4	4	16	4	8	32
Housing Cost	4	1	4	4	3	12	4	8	32	4	8	32	4	4	16	4	4	16	4	2	8	4	6	24	4	5	20	4	7	28
Education	4	3	12	4	7	28	4	9	36	4	5	20	4	8	32	4	10	40	4	4	16	4	1	4	4	6	24	4	2	8
Recreation/Culture	4	5	20	4	7	28	4	3	12	4	3	12	4	4	16	4	4	16	4	6	24	4	1	4	4	2	8	4	8	32
Climate/Environment	4	8	32	4	4	16	4	7	28	4	7	28	4	2	8	4	2	8	4	5	20	4	6	24	4	3	12	4	1	4
Personal Safety	4	1	4	4	3	12	4	2	8	4	4	16	4	2	8	4	2	8	4	6	24	4	5	20	4	8	32	4	7	28
Subtotal	24	23	92	24	30	120	24	36	144	24	34	136	24	23	92	24	25	100	24	24	96	24	21	84	24	28	112	24	33	132
TOTAL	85	163	415	85	156	400	85	174	457	85	134	321	85	117	311	85	151	368	85	119	275	85	144	331	85	138	325	85	159	395

NOTE: Lower scores indicate a stronger competitive position with regard to a particular industry group.

SOURCE: Leland Consulting Group

**BUSINESS LOCATION PROFILE**

**Table 6**

**Facility Type: High Technology**

**HIGH TECHNOLOGY**

	MISSOULA, MT			BOISE, ID			COUER D' ALENE, ID			SPOKANE, WA			SALT LAKE CITY, UT			PARK CITY, UT			COLORADO SPRINGS, CO			FORT COLLINS, CO			ALBUQUERQUE, NM			FLAGSTAFF, AZ		
	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total
<b>LABOR</b>																														
Availability																														
Production	0	6	0	0	4	0	0	4	0	0	1	0	0	5	0	0	5	0	0	3	0	0	3	0	0	4	0	0	2	0
Clerical	3	6	18	3	5	15	3	5	15	3	1	3	3	4	12	3	4	12	3	2	6	3	2	6	3	3	9	3	2	6
Professional/Technical	5	7	35	5	6	30	5	6	30	5	2	10	5	5	25	5	5	25	5	3	15	5	3	15	5	4	20	5	1	5
Skill Mix	5	5	25	5	3	15	5	3	15	5	3	15	5	1	5	5	1	5	5	3	15	5	3	15	5	5	25	5	4	20
Wages (Production)	0	5	0	0	6	0	0	6	0	0	8	0	0	4	0	0	2	0	0	7	0	0	7	0	0	1	0	0	3	0
Fringe Benefits	2	1	2	2	1	2	2	1	2	2	1	2	2	1	2	2	1	2	2	1	2	2	1	2	2	1	2	2	1	2
School Years Completed	1	3	3	1	4	4	1	8	8	1	7	7	1	5	5	1	5	5	1	3	3	1	1	1	1	5	5	1	7	7
Labor Relations	1	6	6	1	3	3	1	3	3	1	7	7	1	2	2	1	2	2	1	5	5	1	5	5	1	4	4	1	1	1
Technical Training																														
Resources	4	5	20	4	4	16	4	6	24	4	2	8	4	2	8	4	7	28	4	1	4	4	5	20	4	3	12	4	6	24
Subtotal	21	44	109	21	36	85	21	42	97	21	32	52	21	29	59	21	32	79	21	28	50	21	30	64	21	30	77	21	27	65
<b>ACCESS TO MARKETS/RESOURCES</b>																														
Geographic Proximity	1	9	9	1	10	10	1	6	6	1	3	3	1	1	1	1	5	5	1	4	4	1	7	7	1	2	2	1	8	8
Intermediate Manufacturing																														
Production	0	7	0	0	4	0	0	4	0	0	6	0	0	5	0	0	5	0	0	3	0	0	3	0	0	2	0	0	1	0
Business/Technical Services	5	3	15	5	5	25	5	5	25	5	7	35	5	4	20	5	4	20	5	1	5	5	1	5	5	6	30	5	2	10
Subtotal	6	19	24	6	19	35	6	15	31	6	16	38	6	10	21	6	14	25	6	8	9	6	11	12	6	10	32	6	11	18
<b>TRANSPORTATION</b>																														
Rail Service	0	2	0	0	7	0	0	8	0	0	5	0	0	1	0	0	9	0	0	3	0	0	6	0	0	3	0	0	4	0
Truck Service	0	1	0	0	7	0	0	7	0	0	3	0	0	2	0	0	2	0	0	4	0	0	4	0	0	6	0	0	5	0
Air Service (freight)	2	7	14	2	4	8	2	6	12	2	2	4	2	1	2	2	9	18	2	5	10	2	9	18	2	3	6	2	8	16
Air Service (Passengers)	5	6	30	5	4	20	5	7	35	5	3	15	5	1	5	5	9	45	5	5	25	5	9	45	5	2	10	5	8	40
Subtotal	7	16	44	7	22	28	7	28	47	7	13	19	7	5	7	7	29	63	7	17	35	7	28	63	7	14	16	7	25	56
<b>UTILITIES</b>																														
Electric Power Cost	3	3	9	3	2	6	3	2	6	3	1	3	3	4	12	3	4	12	3	5	15	3	5	15	3	6	18	3	7	21
Natural Gas Cost	1	3	3	1	1	1	1	1	1	1	1	1	1	4	4	1	4	4	1	2	2	1	2	2	1	5	5	1	6	6
Water and Sewer Cost	1	7	7	1	5	5	1	3	3	1	4	4	1	1	1	1	9	9	1	2	2	1	10	10	1	8	8	1	6	6
Subtotal	5	13	19	5	8	12	5	6	10	5	6	8	5	9	17	5	17	25	5	9	19	5	17	27	5	19	31	5	19	33

**BUSINESS LOCATION PROFILE**

**Table 6**

Facility Type: High Technology

**HIGH TECHNOLOGY**

	MISSOULA, MT			BOISE, ID			COUER D' ALENE, ID			SPOKANE, WA			SALT LAKE CITY, UT			PARK CITY, UT			COLORADO SPRINGS, CO			FORT COLLINS, CO			ALBUQUERQUE, NM			FLAGSTAFF, AZ		
	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total
SITES																														
Cost	2	8	16	2	4	8	2	8	16	2	1	2	2	6	12	2	2	4	2	5	10	2	3	6	2	9	18	2	7	14
Subtotal	2	8	16	2	4	8	2	8	16	2	1	2	2	6	12	2	2	4	2	5	10	2	3	6	2	9	18	2	7	14
BUILDINGS																														
Availability/Quality	3	8	24	3	6	18	3	8	24	3	4	12	3	7	21	3	3	9	3	2	6	3	5	15	3	1	3	3	5	15
Cost	2	3	6	2	5	10	2	4	8	2	7	14	2	6	12	2	2	4	2	5	10	2	4	8	2	2	4	2	1	2
Subtotal	5	11	30	5	11	28	5	12	32	5	11	26	5	13	33	5	5	13	5	7	16	5	9	23	5	3	7	5	6	17
STATE/LOCAL BUSINESS CLIMATE																														
State Business Taxes	2	7	14	2	6	12	2	6	12	2	1	2	2	4	8	2	4	8	2	3	6	2	3	6	2	2	4	2	5	10
Local Property Taxes	2	3	6	2	2	4	2	2	4	2	3	6	2	2	4	2	2	4	2	4	8	2	4	8	2	1	2	2	4	8
Personal Taxes	5	5	25	5	5	25	5	5	25	5	1	5	5	4	20	5	2	10	5	3	15	5	3	15	5	3	15	5	2	10
Business Incentives	1	4	4	1	3	3	1	3	3	1	5	5	1	2	2	1	4	4	1	1	1	1	1	1	1	6	6	1	7	7
Workers Protection Costs	1	4	4	1	3	3	1	3	3	1	5	5	1	1	1	1	1	1	1	6	6	1	6	6	1	4	4	1	2	2
Higher Education Quality	5	5	25	5	4	20	5	6	30	5	2	10	5	2	10	5	7	35	5	1	5	5	5	25	5	3	15	5	6	30
Subtotal	16	28	78	16	23	67	16	25	77	16	17	33	16	15	45	16	20	62	16	18	41	16	22	61	16	19	46	16	26	67
FINANCIAL RESOURCES																														
Traditional Financing	1	1	1	1	2	2	1	2	2	1	4	4	1	7	7	1	7	7	1	3	3	1	3	3	1	6	6	1	5	5
Subtotal	1	1	1	1	2	2	1	2	2	1	4	4	1	7	7	1	7	7	1	3	3	1	3	3	1	6	6	1	5	5
QUALITY OF LIFE																														
Cost of Living	4	5	20	4	6	24	4	7	28	4	7	28	4	3	12	4	3	12	4	1	4	4	2	8	4	4	16	4	8	32
Housing Cost	5	1	5	5	3	15	5	8	40	5	8	40	5	4	20	5	4	20	5	2	10	5	6	30	5	5	25	5	7	35
Education	5	3	15	5	7	35	5	9	45	5	5	25	5	8	40	5	10	50	5	4	20	5	1	5	5	6	30	5	2	10
Recreation/Culture	4	5	20	4	7	28	4	3	12	4	3	12	4	4	16	4	4	16	4	6	24	4	1	4	4	2	8	4	8	32
Climate/Environment	4	8	32	4	4	16	4	7	28	4	7	28	4	2	8	4	2	8	4	5	20	4	6	24	4	3	12	4	1	4
Personal Safety	4	1	4	4	3	12	4	2	8	4	4	16	4	2	8	4	2	8	4	6	24	4	5	20	4	8	32	4	7	28
Subtotal	26	23	96	26	30	130	26	36	161	26	34	149	26	23	104	26	25	114	26	24	102	26	21	91	26	28	123	26	33	141
TOTAL	89	163	417	89	155	395	89	174	473	89	134	331	89	117	305	89	151	392	89	119	285	89	144	350	89	138	356	89	159	416

NOTE: Lower scores indicate a stronger competitive position with regard to a particular industry group.

SOURCE: Leland Consulting Group

**BUSINESS LOCATION PROFILE**  
**Table 7**  
**Facility Type: Light Manufacturing**

**LIGHT MANUFACTURING**

	MISSOULA, MT			BOISE, ID			COUER D' ALENE, ID			SPOKANE, WA			SALT LAKE CITY, UT			PARK CITY, UT			COLORADO SPRINGS, CO			FORT COLLINS, CO			ALBUQUERQUE, NM			FLAGSTAFF, AZ		
	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total
<b>LABOR</b>																														
Availability																														
Production	5	6	30	5	4	20	5	4	20	5	1	5	5	5	25	5	5	25	5	3	15	5	3	15	5	4	20	5	2	10
Clerical	2	6	12	2	5	10	2	5	10	2	1	2	2	4	8	2	4	8	2	2	4	2	2	4	2	3	6	2	2	4
Professional/Technical	3	7	21	3	6	18	3	6	18	3	2	6	3	5	15	3	5	15	3	3	9	3	3	9	3	4	12	3	1	3
Skill Mix	5	5	25	5	3	15	5	3	15	5	3	15	5	1	5	5	1	5	5	3	15	5	3	15	5	5	25	5	4	20
Wages (Production)	5	5	25	5	6	30	5	6	30	5	8	40	5	4	20	5	2	10	5	7	35	5	7	35	5	1	5	5	3	15
Fringe Benefits	3	1	3	3	1	3	3	1	3	3	1	3	3	1	3	3	1	3	3	1	3	3	1	3	3	1	3	3	1	3
School Years Completed	4	3	12	4	4	16	4	8	32	4	7	28	4	5	20	4	5	20	4	3	12	4	1	4	4	5	20	4	7	28
Labor Relations	5	6	30	5	3	15	5	3	15	5	7	35	5	2	10	5	2	10	5	5	25	5	5	25	5	4	20	5	1	5
Technical Training Resources	4	5	20	4	4	16	4	6	24	4	2	8	4	2	8	4	7	28	4	1	4	4	5	20	4	3	12	4	6	24
Subtotal	36	44	178	36	36	143	36	42	167	36	32	142	36	29	114	36	32	124	36	28	122	36	30	130	36	30	123	36	27	112
<b>ACCESS TO MARKETS/RESOURCES</b>																														
Geographic Proximity	5	9	45	5	10	50	5	6	30	5	3	15	5	1	5	5	5	25	5	4	20	5	7	35	5	2	10	5	8	40
Intermediate Manufacturing																														
Production	5	7	35	5	4	20	5	4	20	5	6	30	5	5	25	5	5	25	5	3	15	5	3	15	5	2	10	5	1	5
Business/Technical Services	2	3	6	2	5	10	2	5	10	2	7	14	2	4	8	2	4	8	2	1	2	2	1	2	2	6	12	2	2	4
Subtotal	12	19	86	12	19	80	12	15	60	12	16	59	12	10	38	12	14	58	12	8	37	12	11	52	12	10	32	12	11	49
<b>TRANSPORTATION</b>																														
Rail Service	3	2	6	3	7	21	3	8	24	3	5	15	3	1	3	3	9	27	3	3	9	3	6	18	3	3	9	3	4	12
Truck Service	4	1	4	4	7	28	4	7	28	4	3	12	4	2	8	4	2	8	4	4	16	4	4	16	4	6	24	4	5	20
Air Service (freight)	2	7	14	2	4	8	2	6	12	2	2	4	2	1	2	2	9	18	2	5	10	2	9	18	2	3	6	2	8	16
Air Service (Passengers)	2	6	12	2	4	8	2	7	14	2	3	6	2	1	2	2	9	18	2	5	10	2	9	18	2	2	4	2	8	16
Subtotal	11	16	36	11	22	65	11	28	78	11	13	37	11	5	15	11	29	71	11	17	45	11	28	70	11	14	43	11	25	64
<b>UTILITIES</b>																														
Electric Power Cost	4	3	12	4	2	8	4	2	8	4	1	4	4	4	16	4	4	16	4	5	20	4	5	20	4	6	24	4	7	28
Natural Gas Cost	3	3	9	3	1	3	3	1	3	3	1	3	3	4	12	3	4	12	3	2	6	3	2	6	3	5	15	3	6	18
Water and Sewer Cost	3	7	21	3	5	15	3	3	9	3	4	12	3	1	3	3	9	27	3	2	6	3	10	30	3	8	24	3	6	18
Subtotal	10	13	42	10	8	26	10	6	20	10	6	19	10	9	31	10	17	55	10	9	32	10	17	56	10	19	63	10	19	64



**BUSINESS LOCATION PROFILE**  
**Table 7**  
**Facility Type: Light Manufacturing**

**LIGHT MANUFACTURING**

	MISSOULA, MT			BOISE, ID			COUER D' ALENE, ID			SPOKANE, WA			SALT LAKE CITY, UT			PARK CITY, UT			COLORADO SPRINGS, CO			FORT COLLINS, CO			ALBUQUERQUE, NM			FLAGSTAFF, AZ		
	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total
SITES																														
Cost	3	8	24	3	4	12	3	8	24	3	1	3	3	6	18	3	2	6	3	5	15	3	3	9	3	9	27	3	7	21
Subtotal	3	8	24	3	4	12	3	8	24	3	1	3	3	6	18	3	2	6	3	5	15	3	3	9	3	9	27	3	7	21
BUILDINGS																														
Availability/Quality	5	8	40	5	6	30	5	8	40	5	4	20	5	7	35	5	3	15	5	2	10	5	5	25	5	1	5	5	5	25
Cost	4	3	12	4	5	20	4	4	16	4	7	28	4	6	24	4	2	8	4	5	20	4	4	16	4	2	8	4	1	4
Subtotal	9	11	52	9	11	50	9	12	56	9	11	48	9	13	59	9	5	23	9	7	30	9	9	41	9	3	13	9	6	29
STATE/LOCAL BUSINESS CLIMATE																														
State Business Taxes	3	7	21	3	6	18	3	6	18	3	1	3	3	4	12	3	4	12	3	3	9	3	3	9	3	2	6	3	5	15
Local Property Taxes	4	3	12	4	2	8	4	2	8	4	3	12	4	2	8	4	2	8	4	4	16	4	4	16	4	1	4	4	4	16
Personal Taxes	3	5	15	3	5	15	3	5	15	3	1	3	3	4	12	3	2	6	3	3	9	3	3	9	3	3	9	3	2	6
Business Incentives	5	4	20	5	3	15	5	3	15	5	5	25	5	2	10	5	4	20	5	1	5	5	1	5	5	6	30	5	7	35
Workers Protection Costs	5	4	20	5	3	15	5	3	15	5	5	25	5	1	5	5	1	5	5	6	30	5	6	30	5	4	20	5	2	10
Higher Education Quality	2	5	10	2	4	8	2	6	12	2	2	4	2	2	4	2	7	14	2	1	2	2	5	10	2	3	6	2	6	12
Subtotal	22	28	98	22	23	79	22	25	83	22	17	72	22	15	51	22	20	65	22	18	71	22	22	79	22	19	75	22	26	94
FINANCIAL RESOURCES																														
Traditional Financing	1	1	1	1	2	2	1	2	2	1	4	4	1	7	7	1	7	7	1	3	3	1	3	3	1	6	6	1	5	5
Subtotal	1	1	1	1	2	2	1	2	2	1	4	4	1	7	7	1	7	7	1	3	3	1	3	3	1	6	6	1	5	5
QUALITY OF LIFE																														
Cost of Living	2	5	10	2	6	12	2	7	14	2	7	14	2	3	6	2	3	6	2	1	2	2	2	4	2	4	8	2	8	16
Housing Cost	2	1	2	2	3	6	2	8	16	2	8	16	2	4	8	2	4	8	2	2	4	2	6	12	2	5	10	2	7	14
Education	3	3	9	3	7	21	3	9	27	3	5	15	3	8	24	3	10	30	3	4	12	3	1	3	3	6	18	3	2	6
Recreation/Culture	2	5	10	2	7	14	2	3	6	2	3	6	2	4	8	2	4	8	2	6	12	2	1	2	2	2	4	2	8	16
Climate/Environment	1	8	8	1	4	4	1	7	7	1	7	7	1	2	2	1	2	2	1	5	5	1	6	6	1	3	3	1	1	1
Personal Safety	2	1	2	2	3	6	2	2	4	2	4	8	2	2	4	2	2	4	2	6	12	2	5	10	2	8	16	2	7	14
Subtotal	12	23	41	12	30	63	12	36	74	12	34	66	12	23	52	12	25	58	12	24	47	12	21	37	12	28	59	12	33	67
TOTAL	116	163	558	116	155	520	116	174	564	116	134	450	116	117	385	116	151	467	116	119	402	116	144	477	116	138	441	116	159	505

NOTE: Lower scores indicate a stronger competitive position with regard to a particular industry group.

SOURCE: Leland Consulting Group

BUSINESS LOCATION PROFILE

Table 8

Facility Type: Information Processing

INFORMATION PROCESSING

	MISSOULA, MT			BOISE, ID			COUER D'ALENE, ID			SPOKANE, WA			SALT LAKE CITY, UT			PARK CITY, UT			COLORADO SPRINGS, CO			FORT COLLINS, CO			ALBUQUERQUE, NM			FLAGSTAFF, AZ		
	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total
<b>LABOR</b>																														
Availability																														
Production	0	6	0	0	4	0	0	4	0	0	1	0	0	5	0	0	5	0	0	3	0	0	3	0	0	4	0	0	2	0
Clerical	5	6	30	5	5	25	5	5	25	5	1	5	5	4	20	5	4	20	5	2	10	5	2	10	5	3	15	5	2	10
Professional/Technical	3	7	21	3	6	18	3	6	18	3	2	6	3	5	15	3	5	15	3	3	9	3	3	9	3	4	12	3	1	3
Skill Mix	3	5	15	3	3	9	3	3	9	3	3	9	3	1	3	3	1	3	3	3	9	3	3	9	3	5	15	3	4	12
Wages (Production)	0	5	0	0	6	0	0	6	0	0	8	0	0	4	0	0	2	0	0	7	0	0	7	0	0	1	0	0	3	0
Fringe Benefits	2	1	2	2	1	2	2	1	2	2	1	2	2	1	2	2	1	2	2	1	2	2	1	2	2	1	2	2	1	2
School Years Completed	3	3	9	3	4	12	3	8	24	3	7	21	3	5	15	3	5	15	3	3	9	3	1	3	3	5	15	3	7	21
Labor Relations	3	6	18	3	3	9	3	3	9	3	7	21	3	2	6	3	2	6	3	5	15	3	5	15	3	4	12	3	1	3
Technical Training																														
Resources	2	5	10	2	4	8	2	6	12	2	2	4	2	2	4	2	7	14	2	1	2	2	5	10	2	3	6	2	6	12
Subtotal	21	44	105	21	36	83	21	42	99	21	32	68	21	29	65	21	32	75	21	28	56	21	30	58	21	30	77	21	27	63
<b>ACCESS TO MARKETS/RESOURCES</b>																														
Geographic Proximity	2	9	18	2	10	20	2	6	12	2	3	6	2	1	2	2	5	10	2	4	8	2	7	14	2	2	4	2	8	16
Intermediate Manufacturing																														
Production	0	7	0	0	4	0	0	4	0	0	6	0	0	5	0	0	5	0	0	3	0	0	3	0	0	2	0	0	1	0
Business/Technical Services	4	3	12	4	5	20	4	5	20	4	7	28	4	4	16	4	4	16	4	1	4	4	1	4	4	6	24	4	2	8
Subtotal	6	19	30	6	19	40	6	15	32	6	16	34	6	10	18	6	14	26	6	8	12	6	11	18	6	10	28	6	11	24
<b>TRANSPORTATION</b>																														
Rail Service	0	2	0	0	7	0	0	8	0	0	5	0	0	1	0	0	9	0	0	3	0	0	6	0	0	3	0	0	4	0
Truck Service	0	1	0	0	7	0	0	7	0	0	3	0	0	2	0	0	2	0	0	4	0	0	4	0	0	6	0	0	5	0
Air Service (freight)	1	7	7	1	4	4	1	6	6	1	2	2	1	1	1	1	9	9	1	5	5	1	9	9	1	3	3	1	8	8
Air Service (Passengers)	5	6	30	5	4	20	5	7	35	5	3	15	5	1	5	5	9	45	5	5	25	5	9	45	5	2	10	5	8	40
Subtotal	6	16	37	6	22	24	6	28	41	6	13	17	6	5	6	6	29	54	6	17	30	6	28	54	6	14	13	6	25	48
<b>UTILITIES</b>																														
Electric Power Cost	2	3	6	2	2	4	2	2	4	2	1	2	2	4	8	2	4	8	2	5	10	2	5	10	2	6	12	2	7	14
Natural Gas Cost	1	3	3	1	1	1	1	1	1	1	1	1	1	4	4	1	4	4	1	2	2	1	2	2	1	5	5	1	6	6
Water and Sewer Cost	1	7	7	1	5	5	1	3	3	1	4	4	1	1	1	1	9	9	1	2	2	1	10	10	1	8	8	1	6	6
Subtotal	4	13	16	4	8	10	4	6	8	4	6	7	4	9	13	4	17	21	4	9	14	4	17	22	4	19	25	4	19	26

**BUSINESS LOCATION PROFILE**  
**Table 8**  
**Facility Types: Information Processing**

**INFORMATION PROCESSING**

	MISSOULA, MT			BOISE, ID			COUER D' ALENE, ID			SPOKANE, WA			SALT LAKE CITY, UT			PARK CITY, UT			COLORADO SPRINGS, CO			FORT COLLINS, CO			ALBUQUERQUE, NM			FLAGSTAFF, AZ		
	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total
SITES																														
Cost	3	8	24	3	4	12	3	8	24	3	1	3	3	6	18	3	2	6	3	5	15	3	3	9	3	9	27	3	7	21
Subtotal	3	8	24	3	4	12	3	8	24	3	1	3	3	6	18	3	2	6	3	5	15	3	3	9	3	9	27	3	7	21
BUILDINGS																														
Availability/Quality	4	8	32	4	6	24	4	8	32	4	4	16	4	7	28	4	3	12	4	2	8	4	5	20	4	1	4	4	5	20
Cost	4	3	12	4	5	20	4	4	16	4	7	28	4	6	24	4	2	8	4	5	20	4	4	16	4	2	8	4	1	4
Subtotal	8	11	44	8	11	44	8	12	48	8	11	44	8	13	52	8	5	20	8	7	28	8	9	36	8	3	12	8	6	24
STATE/LOCAL BUSINESS CLIMATE																														
State Business Taxes	4	7	28	4	6	24	4	6	24	4	1	4	4	4	16	4	4	16	4	3	12	4	3	12	4	2	8	4	5	20
Local Property Taxes	3	3	9	3	2	6	3	2	6	3	3	9	3	2	6	3	2	6	3	4	12	3	4	12	3	1	3	3	4	12
Personal Taxes	4	5	20	4	5	20	4	5	20	4	1	4	4	4	16	4	2	8	4	3	12	4	3	12	4	3	12	4	2	8
Business Incentives	3	4	12	3	3	9	3	3	9	3	5	15	3	2	6	3	4	12	3	1	3	3	1	3	3	6	18	3	7	21
Workers Protection Costs	1	4	4	1	3	3	1	3	3	1	5	5	1	1	1	1	1	1	1	6	6	1	6	6	1	4	4	1	2	2
Higher Education Quality	3	5	15	3	4	12	3	6	18	3	2	6	3	2	6	3	7	21	3	1	3	3	5	15	3	3	9	3	6	18
Subtotal	18	28	88	18	23	74	18	25	80	18	17	43	18	15	51	18	20	64	18	18	48	18	22	60	18	19	54	18	26	81
FINANCIAL RESOURCES																														
Traditional Financing	1	1	1	1	2	2	1	2	2	1	4	4	1	7	7	1	7	7	1	3	3	1	3	3	1	6	6	1	5	5
Subtotal	1	1	1	1	2	2	1	2	2	1	4	4	1	7	7	1	7	7	1	3	3	1	3	3	1	6	6	1	5	5
QUALITY OF LIFE																														
Cost of Living	3	5	15	3	6	18	3	7	21	3	7	21	3	3	9	3	3	9	3	1	3	3	2	6	3	4	12	3	8	24
Housing Cost	3	1	3	3	3	9	3	8	24	3	8	24	3	4	12	3	4	12	3	2	6	3	6	18	3	5	15	3	7	21
Education	3	3	9	3	7	21	3	9	27	3	5	15	3	8	24	3	10	30	3	4	12	3	1	3	3	6	18	3	2	6
Recreation/Culture	3	5	15	3	7	21	3	3	9	3	3	9	3	4	12	3	4	12	3	6	18	3	1	3	3	2	6	3	8	24
Climate/Environment	3	8	24	3	4	12	3	7	21	3	7	21	3	2	6	3	2	6	3	5	15	3	6	18	3	3	9	3	1	3
Personal Safety	3	1	3	3	3	9	3	2	6	3	4	12	3	2	6	3	2	6	3	6	18	3	5	15	3	8	24	3	7	21
Subtotal	18	23	69	18	30	90	18	36	108	18	34	102	18	23	69	18	25	75	18	24	72	18	21	63	18	28	84	18	33	99
TOTAL	85	163	414	85	155	379	85	174	442	85	134	322	85	117	299	85	151	348	85	119	278	85	144	323	85	138	326	85	159	391

NOTE: Lower scores indicate a stronger competitive position with regard to a particular industry group.

SOURCE: Leland Consulting Group

## BUSINESS LOCATION PROFILE

Table 9

Facility Type: International

## INTERNATIONAL

	MISSOULA, MT			BOISE, ID			COUER D' ALENE, ID			SPOKANE, WA			SALT LAKE CITY, UT			PARK CITY, UT			COLORADO SPRINGS, CO			FORT COLLINS, CO			ALBUQUERQUE, NM			FLAGSTAFF, AZ		
	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total
<b>LABOR</b>																														
Availability																														
Production	4	6	24	4	4	16	4	4	16	4	1	4	4	5	20	4	5	20	4	3	12	4	3	12	4	4	16	4	2	8
Clerical	2	6	12	2	5	10	2	5	10	2	1	2	2	4	8	2	4	8	2	2	4	2	2	4	2	3	6	2	2	4
Professional/Technical	5	7	35	5	6	30	5	6	30	5	2	10	5	5	25	5	5	25	5	3	15	5	3	15	5	4	20	5	1	5
Skill Mix	5	5	25	5	3	15	5	3	15	5	3	15	5	1	5	5	1	5	5	3	15	5	3	15	5	5	25	5	4	20
Wages (Production)	5	5	25	5	6	30	5	6	30	5	8	40	5	4	20	5	2	10	5	7	35	5	7	35	5	1	5	5	3	15
Fringe Benefits	2	1	2	2	1	2	2	1	2	2	1	2	2	1	2	2	1	2	2	1	2	2	1	2	2	1	2	2	1	2
School Years Completed	5	3	15	5	4	20	5	8	40	5	7	35	5	5	25	5	5	25	5	3	15	5	1	5	5	5	25	5	7	35
Labor Relations	5	6	30	5	3	15	5	3	15	5	7	35	5	2	10	5	2	10	5	5	25	5	5	25	5	4	20	5	1	5
Technical Training Resources	5	5	25	5	4	20	5	6	30	5	2	10	5	2	10	5	7	35	5	1	5	5	5	25	5	3	15	5	6	30
Subtotal	38	44	193	38	36	158	38	42	188	38	32	153	38	29	125	38	32	140	38	28	128	38	30	138	38	30	134	38	27	124
<b>ACCESS TO MARKETS/RESOURCES</b>																														
Geographic Proximity	5	9	45	5	10	50	5	6	30	5	3	15	5	1	5	5	5	25	5	4	20	5	7	35	5	2	10	5	8	40
Intermediate Manufacturing																														
Production	5	7	35	5	4	20	5	4	20	5	6	30	5	5	25	5	5	25	5	3	15	5	3	15	5	2	10	5	1	5
Business/Technical Services	2	3	6	2	5	10	2	5	10	2	7	14	2	4	8	2	4	8	2	1	2	2	1	2	2	6	12	2	2	4
Subtotal	12	19	86	12	19	80	12	15	60	12	16	59	12	10	38	12	14	58	12	8	37	12	11	52	12	10	32	12	11	49
<b>TRANSPORTATION</b>																														
Rail Service	3	2	6	3	7	21	3	8	24	3	5	15	3	1	3	3	9	27	3	3	9	3	6	18	3	3	9	3	4	12
Truck Service	4	1	4	4	7	28	4	7	28	4	3	12	4	2	8	4	2	8	4	4	16	4	4	16	4	6	24	4	5	20
Air Service (freight)	3	7	21	3	4	12	3	6	18	3	2	6	3	1	3	3	9	27	3	5	15	3	9	27	3	3	9	3	8	24
Air Service (Passengers)	3	6	18	3	4	12	3	7	21	3	3	9	3	1	3	3	9	27	3	5	15	3	9	27	3	2	6	3	8	24
Subtotal	13	16	49	13	22	73	13	28	91	13	13	42	13	5	17	13	29	89	13	17	55	13	28	88	13	14	48	13	25	80
<b>UTILITIES</b>																														
Electric Power Cost	4	3	12	4	2	8	4	2	8	4	1	4	4	4	16	4	4	16	4	5	20	4	5	20	4	6	24	4	7	28
Natural Gas Cost	3	3	9	3	1	3	3	1	3	3	1	3	3	4	12	3	4	12	3	2	6	3	2	6	3	5	15	3	6	18
Water and Sewer Cost	3	7	21	3	5	15	3	3	9	3	4	12	3	1	3	3	9	27	3	2	6	3	10	30	3	8	24	3	6	18
Subtotal	10	13	42	10	8	26	10	6	20	10	6	19	10	9	31	10	17	55	10	9	32	10	17	56	10	19	63	10	19	64

**BUSINESS LOCATION PROFILE**

Table 9

Facility Type International

**INTERNATIONAL**

	MISSOULA, MT			BOISE, ID			COUER D' ALENE, ID			SPOKANE, WA			SALT LAKE CITY, UT			PARK CITY, UT			COLORADO SPRINGS, CO			FORT COLLINS, CO			ALBUQUERQUE, NM			FLAGSTAFF, AZ		
	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total
<b>SITES</b>																														
Cost	2	8	16	2	4	8	2	8	16	2	1	2	2	6	12	2	2	4	2	5	10	2	3	6	2	9	18	2	7	14
Subtotal	2	8	16	2	4	8	2	8	16	2	1	2	2	6	12	2	2	4	2	5	10	2	3	6	2	9	18	2	7	14
<b>BUILDINGS</b>																														
Availability/Quality	5	8	40	5	6	30	5	8	40	5	4	20	5	7	35	5	3	15	5	2	10	5	5	25	5	1	5	5	5	25
Cost	3	3	9	3	5	15	3	4	12	3	7	21	3	6	18	3	2	6	3	5	15	3	4	12	3	2	6	3	1	3
Subtotal	8	11	49	8	11	45	8	12	52	8	11	41	8	13	53	8	5	21	8	7	25	8	9	37	8	3	11	8	6	28
<b>STATE/LOCAL BUSINESS CLIMATE</b>																														
State Business Taxes	5	7	35	5	6	30	5	6	30	5	1	5	5	4	20	5	4	20	5	3	15	5	3	15	5	2	10	5	5	25
Local Property Taxes	4	3	12	4	2	8	4	2	8	4	3	12	4	2	8	4	2	8	4	4	16	4	4	16	4	1	4	4	4	16
Personal Taxes	5	5	25	5	5	25	5	5	25	5	1	5	5	4	20	5	2	10	5	3	15	5	3	15	5	3	15	5	2	10
Business Incentives	5	4	20	5	3	15	5	3	15	5	5	25	5	2	10	5	4	20	5	1	5	5	1	5	5	6	30	5	7	35
Workers Protection Costs	3	4	12	3	3	9	3	3	9	3	5	15	3	1	3	3	1	3	3	6	18	3	6	18	3	4	12	3	2	6
Higher Education Quality	4	5	20	4	4	16	4	6	24	4	2	8	4	2	8	4	7	28	4	1	4	4	5	20	4	3	12	4	6	24
Subtotal	26	28	124	26	23	103	26	25	111	26	17	70	26	15	69	26	20	89	26	18	73	26	22	89	26	19	83	26	26	116
<b>FINANCIAL RESOURCES</b>																														
Traditional Financing	1	1	1	1	2	2	1	2	2	1	4	4	1	7	7	1	7	7	1	3	3	1	3	3	1	6	6	1	5	5
Subtotal	1	1	1	1	2	2	1	2	2	1	4	4	1	7	7	1	7	7	1	3	3	1	3	3	1	6	6	1	5	5
<b>QUALITY OF LIFE</b>																														
Cost of Living	3	5	15	3	6	18	3	7	21	3	7	21	3	3	9	3	3	9	3	1	3	3	2	6	3	4	12	3	8	24
Housing Cost	5	1	5	5	3	15	5	8	40	5	8	40	5	4	20	5	4	20	5	2	10	5	6	30	5	5	25	5	7	35
Education	5	3	15	5	7	35	5	9	45	5	5	25	5	8	40	5	10	50	5	4	20	5	1	5	5	6	30	5	2	10
Recreation/Culture	3	5	15	3	7	21	3	3	9	3	3	9	3	4	12	3	4	12	3	6	18	3	1	3	3	2	6	3	8	24
Climate/Environment	3	8	24	3	4	12	3	7	21	3	7	21	3	2	6	3	2	6	3	5	15	3	6	18	3	3	9	3	1	3
Personal Safety	3	1	3	3	3	9	3	2	6	3	4	12	3	2	6	3	2	6	3	6	18	3	5	15	3	8	24	3	7	21
Subtotal	22	23	77	22	30	110	22	36	142	22	34	128	22	23	93	22	25	103	22	24	84	22	21	77		28	106	22	33	117
TOTAL	132	163	637	132	155	605	132	174	682	132	134	518	132	117	445	132	151	566	132	119	447	132	144	546	110	138	501	132	159	597

NOTE: Lower scores indicate a stronger competitive position with regard to a particular industry group.

SOURCE: Leland Consulting Group

**BUSINESS LOCATION PROFILE**

Table 10

Facility Type: Research and Development

**RESEARCH AND DEVELOPMENT**

	MISSOULA, MT			BOISE, ID			COUER D'ALENE, ID			SPOKANE, WA			SALT LAKE CITY, UT			PARK CITY, UT			COLORADO SPRINGS, CO			FORT COLLINS, CO			ALBUQUERQUE, NM			FLAGSTAFF, AZ		
	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total
<b>LABOR</b>																														
Availability																														
Production	0	6	0	0	4	0	0	4	0	0	1	0	0	5	0	0	5	0	0	3	0	0	3	0	0	4	0	0	2	0
Clerical	4	6	24	4	5	20	4	5	20	4	1	4	4	4	16	4	4	16	4	2	8	4	2	8	4	3	12	4	2	8
Professional/Technical	5	7	35	5	6	30	5	6	30	5	2	10	5	5	25	5	5	25	5	3	15	5	3	15	5	4	20	5	1	5
Skill Mix	5	5	25	5	3	15	5	3	15	5	3	15	5	1	5	5	1	5	5	3	15	5	3	15	5	5	25	5	4	20
Wages (Production)	0	5	0	0	6	0	0	6	0	0	8	0	0	4	0	0	2	0	0	7	0	0	7	0	0	1	0	0	3	0
Fringe Benefits	2	1	2	2	1	2	2	1	2	2	1	2	2	1	2	2	1	2	2	1	2	2	1	2	2	1	2	2	1	2
School Years Completed	4	3	12	4	4	16	4	8	32	4	7	28	4	5	20	4	5	20	4	3	12	4	1	4	4	5	20	4	7	28
Labor Relations	1	6	6	1	3	3	1	3	3	1	7	7	1	2	2	1	2	2	1	5	5	1	5	5	1	4	4	1	1	1
Technical Training																														
Resources	4	5	20	4	4	16	4	6	24	4	2	8	4	2	8	4	7	28	4	1	4	4	5	20	4	3	12	4	6	24
Subtotal	25	44	124	25	36	102	25	42	126	25	32	74	25	29	78	25	32	98	25	28	61	25	30	69	25	30	95	25	27	88
<b>ACCESS TO MARKETS/RESOURCES</b>																														
Geographic Proximity	1	9	9	1	10	10	1	6	6	1	3	3	1	1	1	1	5	5	1	4	4	1	7	7	1	2	2	1	8	8
Intermediate Manufacturing																														
Production	0	7	0	0	4	0	0	4	0	0	6	0	0	5	0	0	5	0	0	3	0	0	3	0	0	2	0	0	1	0
Business/Technical Services	4	3	12	4	5	20	4	5	20	4	7	28	4	4	16	4	4	16	4	1	4	4	1	4	4	6	24	4	2	8
Subtotal	5	19	21	5	19	30	5	15	26	5	16	31	5	10	17	5	14	21	5	8	8	5	11	11	5	10	26	5	11	16
<b>TRANSPORTATION</b>																														
Rail Service	0	2	0	0	7	0	0	8	0	0	5	0	0	1	0	0	9	0	0	3	0	0	6	0	0	3	0	0	4	0
Truck Service	0	1	0	0	7	0	0	7	0	0	3	0	0	2	0	0	2	0	0	4	0	0	4	0	0	6	0	0	5	0
Air Service (freight)	3	7	21	3	4	12	3	6	18	3	2	6	3	1	3	3	9	27	3	5	15	3	9	27	3	3	9	3	8	24
Air Service (Passengers)	5	6	30	5	4	20	5	7	35	5	3	15	5	1	5	5	9	45	5	5	25	5	9	45	5	2	10	5	8	40
Subtotal	8	16	51	8	22	32	8	28	53	8	13	21	8	5	8	8	29	72	8	17	40	8	28	72	8	14	19	8	25	64
<b>UTILITIES</b>																														
Electric Power Cost	4	3	12	4	2	8	4	2	8	4	1	4	4	4	16	4	4	16	4	5	20	4	5	20	4	6	24	4	7	28
Natural Gas Cost	1	3	3	1	1	1	1	1	1	1	1	1	1	4	4	1	4	4	1	2	2	1	2	2	1	5	5	1	6	6
Water and Sewer Cost	1	7	7	1	5	5	1	3	3	1	4	4	1	1	1	1	9	9	1	2	2	1	10	10	1	8	8	1	6	6
Subtotal	6	13	22	6	8	14	6	6	12	6	6	9	6	9	21	6	17	29	6	9	24	6	17	32	6	19	37	6	19	40

BUSINESS LOCATION PROFILE  
Table 10  
Facility Type: Research and Development

RESEARCH AND DEVELOPMENT

	MISSOULA, MT			BOISE, ID			COUER D' ALENE, ID			SPOKANE, WA			SALT LAKE CITY, UT			PARK CITY, UT			COLORADO SPRINGS, CO			FORT COLLINS, CO			ALBUQUERQUE, NM			FLAGSTAFF, AZ		
	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total	Weight	Score	Total			
SITES																														
Cost	3	8	24	3	4	12	3	8	24	3	1	3	3	6	18	3	2	6	3	5	15	3	3	9	3	9	27	3	7	21
Subtotal	3	8	24	3	4	12	3	8	24	3	1	3	3	6	18	3	2	6	3	5	15	3	3	9	3	9	27	3	7	21
BUILDINGS																														
Availibility/Quality	4	8	32	4	6	24	4	8	32	4	4	16	4	7	28	4	3	12	4	2	8	4	5	20	4	1	4	4	5	20
Cost	2	3	6	2	5	10	2	4	8	2	7	14	2	6	12	2	2	4	2	5	10	2	4	8	2	2	4	2	1	2
Subtotal	6	11	38	6	11	34	6	12	40	6	11	30	6	13	40	6	5	16	6	7	18	6	9	28	6	3	8	6	6	22
STATE/LOCAL BUSINESS CLIMATE																														
State Business Taxes	3	7	21	3	6	18	3	6	18	3	1	3	3	4	12	3	4	12	3	3	9	3	3	9	3	2	6	3	5	15
Local Property Taxes	2	3	6	2	2	4	2	2	4	2	3	6	2	2	4	2	2	4	2	4	8	2	4	8	2	1	2	2	4	8
Personal Taxes	5	5	25	5	5	25	5	5	25	5	1	5	5	4	20	5	2	10	5	3	15	5	3	15	5	3	15	5	2	10
Business Incentives	2	4	8	2	3	6	2	3	6	2	5	10	2	2	4	2	4	8	2	1	2	2	1	2	2	6	12	2	7	14
Workers Protection Costs	1	4	4	1	3	3	1	3	3	1	5	5	1	1	1	1	1	1	1	6	6	1	6	6	1	4	4	1	2	2
Higher Education Quality	5	5	25	5	4	20	5	6	30	5	2	10	5	2	10	5	7	35	5	1	5	5	5	25	5	3	15	5	6	30
Subtotal	18	28	89	18	23	76	18	25	86	18	17	39	18	15	51	18	20	70	18	18	45	18	22	65	18	19	54	18	26	79
FINANCIAL RESOURCES																														
Traditional Financing	1	1	1	1	2	2	1	2	2	1	4	4	1	7	7	1	7	7	1	3	3	1	3	3	1	6	6	1	5	5
Subtotal	1	1	1	1	2	2	1	2	2	1	4	4	1	7	7	1	7	7	1	3	3	1	3	3	1	6	6	1	5	5
QUALITY OF LIFE																														
Cost of Living	4	5	20	4	6	24	4	7	28	4	7	28	4	3	12	4	3	12	4	1	4	4	2	8	4	4	16	4	8	32
Housing Cost	5	1	5	5	3	15	5	8	40	5	8	40	5	4	20	5	4	20	5	2	10	5	6	30	5	5	25	5	7	35
Education	5	3	15	5	7	35	5	9	45	5	5	25	5	8	40	5	10	50	5	4	20	5	1	5	5	6	30	5	2	10
Recreation/Culture	4	5	20	4	7	28	4	3	12	4	3	12	4	4	16	4	4	16	4	6	24	4	1	4	4	2	8	4	8	32
Climate/Environment	4	8	32	4	4	16	4	7	28	4	7	28	4	2	8	4	2	8	4	5	20	4	6	24	4	3	12	4	1	4
Personal Safety	4	1	4	4	3	12	4	2	8	4	4	16	4	2	8	4	2	8	4	6	24	4	5	20	4	8	32	4	7	28
Subtotal	26	23	96	26	30	130	26	36	161	26	34	149	26	23	104	26	25	114	26	24	102	26	21	91	26	28	123	26	33	141
TOTAL	98	163	466	98	155	432	98	174	530	98	134	360	98	117	344	98	151	433	98	119	316	98	144	380	98	138	395	98	159	476

NOTE: Lower scores indicate a stronger competitive position with regard to a particular industry group.

SOURCE: Leland Consulting Group

**BUSINESS LOCATION PROFILE**  
**Table 11**  
**Summary Rankings by Facility Type**

	MISSOULA MT Ranking	BOISE ID Ranking	COUER D' ALENE ID Ranking	SPOKANE WA Ranking	SALT LAKE CITY UT Ranking	PARK CITY UT Ranking	COLO. SPGS. CO Ranking	FORT COLLINS CO Ranking	ALBUQUERQUE NM Ranking	FLAGSTAFF AZ Ranking
<b>FACILITY TYPE:</b>										
<b>ADMINISTRATIVE HEADQUARTERS</b>	9	8	10	3	2	6	1	5	4	7
<b>LIGHT MANUFACTURING</b>	9	8	10	4	1	5	2	6	3	7
<b>HIGH TECHNOLOGY</b>	9	7	10	3	2	6	1	4	5	8
<b>RESEARCH AND DEVELOPMENT</b>	8	6	10	3	2	7	1	4	5	9
<b>INFORMATION PROCESSING</b>	9	7	10	3	2	6	1	4	5	8
<b>INTERNATIONAL</b>	9	8	10	4	1	6	2	5	3	7

**NOTE:** Lower scores indicate a stronger competitive position with regard to a particular industry group.

**SOURCE:** Leland Consulting Group



## SECTION IV:

# TARGET INDUSTRY ANALYSIS

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## INTRODUCTION

- *Target Industry Analysis Defined: Qualitative and quantitative targeting analysis of select industries which exhibit a locational fit with a market.*

An important component in designing the Missoula Airport Development Park Master Plan and Implementation Plan is the identification of regionally intensive target industries and business organizations with a strong likelihood of locating within the subject property. The Target Industry Analysis provides direction to future marketing efforts and assists in defining the project theme and supporting land uses and services within the planning area. By focusing the land use program to those industries which will potentially seek relocation and expansion opportunities in the market, the Missoula area will make the most efficient use of available resources and more effectively position itself for local investment.

The following discussion presents an overview of the target industry analysis and screening methodology. A description of the method used to select the target industries and businesses is then presented, and the application of this methodology to the select industries outlined in more detail so that the reader may better understand the results. Finally, a detailed description for each of the finalist industries is presented in the form of Industry Opportunity Fact Sheets.

The design of a master plan for a business or industrial park is an iterative process whereby the work of the planner and engineer is influenced by the work of the economic and market analyst, and visa versa. As the final plan is impacted by several factors, including industries identified as viable for location within the market, so too the selection of industries for location within a park is influenced by physical and non-physical factors including: park design covenants and restrictions, community goals and environmental constraints. Therefore, each of the finalist industries is presented in a table preceding the Industry Opportunity Fact Sheets and analyzed for compatibility within the Missoula Airport Development Park, based on criteria established by the Concept Teams, Development Advisory Committee and County Commissioners.

## TARGET INDUSTRY SCREENING METHODOLOGY AND ANALYSIS

The approach used in selecting the target industries combines computer technology with Leland Consulting Group's practical experience in corporate real estate and economic development. The overall process of target industry identification consists of a series of sequential screening steps designed to eliminate all but the most favorable industries and business sectors. This is not to say that those industries which do not survive the screening methodology do not have a presence in the market, or that they

are not viable. Rather, the method is designed to screen out those industries which have the greatest potential for locating in the market. Parameters used in this analysis combined corporate facility siting criteria with the County's long range objectives for the property.

The location decision tends to place the greatest emphasis on market, operational and personal linkages with the finally selected site. Many new location projects are initiated because of dissatisfaction with operating conditions in an existing location rather than the need for additional space. This trend adds credibility to a regional geographic targeting approach. The results of this analysis identified target industries and business groups that will be attracted to the competitive advantages of the Missoula market and which represent promising development opportunities for the subject property. The following discussion describes the specific steps taken to identify first, the appropriate industries for the market; and second, the best geographic target market for future business attraction efforts.

More specifically, six steps were used to guide the analysis and eventual selection of the identified industries.

#### SCREEN NO. 1

■ *Identify a universe of potential industry groups and business sectors.*

The initial universe of industries selected for the target analysis was derived from a review of growth industries within the Pacific Northwest, Great Plains and Rocky Mountain Regions. The Divisions of Employment within the States of Oregon, Washington, Idaho, Utah, Arizona, North Dakota, South Dakota, Minnesota, Colorado and Montana were contacted in order to identify those industries which, are either projected to grow over the near-term or have historically (1988 to 1992) exhibited a pattern of growth.

Industry groups included in the original universe are presented in Screen No. 1.

#### SCREEN NO. 2

■ *Analyze industry growth and size on a national scale.*

The growth performance of an industry is a key factor in a target industry analysis since business expansion and new market development are two of the most common reasons underlying the need for additional production or service capacity. The following statistical measures were used to analyze industry growth performance on a national scale. These include:

- Historical employment growth nationally from 1980 to 1987 and 1987 to 1991, by industry category.
- Historical establishment growth nationally from 1980 to 1987 and 1987 to 1991, by industry category.
- Historical trends in average number of employees per establishment, by industry category, during these same time periods.

Industries were retained for further analysis if they exhibited growth in the number of establishments between 1987 to 1991, equal to or above the national average growth for each major industry group. The following example illustrates the screening method.

SIC Code	Industry Description	% of Establishment Growth 1987-1991
24	Lumber and Wood Products, Except Furniture	2.32%
2434	Millwork, Veneer, Plywood et. al	1.20%
25	Furniture and Fixtures	4.13%
2511	Wood Household Furniture, Except Upholstered	-10.92%

In the example presented above, the first three industries will survive this screen since the manufacturing industry, at the national level, grew at a rate of approximately 1.0% during the period from 1987 to 1991. The fourth industry would not survive as it experienced negative growth during this period.

The analysis of industry growth patterns is presented in Screens No. 2A and No. 2B.

**Note:** The traditional target industry analysis would typically eliminate an industry if the average establishment size was below, for example, 55 employees for non-service industry sectors and 23 employees for service industry sectors. In Montana, only 184 manufacturing establishments of all types employ more than 20 people, a trend indicative of many small businesses in recent years, particularly in destination communities such as Missoula. Therefore, this criteria was not used.

### SCREEN NO. 3

#### ■ *Evaluate geographic distribution of economic activities by industry.*

The industries that survived the growth analysis were evaluated further to determine their level of investment in the region, as well as the type of business opportunities they presented. The purpose of this analysis within the target industry screening process is to identify those industries whose location patterns favor Montana and the Northwestern and Rocky Mountain United States.

The factors that were used in the analysis were as follows:

#### **Meets the location quotient criteria established for this analysis**

A locational quotient was calculated for each state and the region as a whole. The Location Quotient (LQ) compares the relative level of employment in an industry and in an area, with the relative level of employment in that industry on a nationwide basis. As a standard, if the national LQ equals 1.00, then the area (such

as the Region or the State) LQ over or under 1.00 represents either a high or low concentration of employment in that industry as compared to the nation.

For this analysis, those industries which exhibited an LQ of 1.00 or higher were retained for further screening.

SIC Code	Industry Description	Regional Location Quotient
24	Lumber and Wood Products, Except Furniture	2.63
243	Millwork, Veneer, Plywood et. al	2.64
25	Furniture and Fixtures	0.51

Using the same industries from the previous example, the first two industries will survive this screen since they exhibit a regional location quotient greater than 1.0. The third industry would not survive with a regional location quotient less than 1.0.

Can provide a linkage to the County's and State's economic base of industries

The industries which survived the previous step were further analyzed with respect to their "fit" with the Missoula area and State of Montana locational strengths and weaknesses. Conclusions derived from interviews with area employers, combined with data gathered during the Business Location Profile analysis were used as the basis for further refinement of the surviving industry groups.

Note: A high concentration of an industry in a specific state (i.e., California) justifies marketing that geographic location since there are enough representative companies to target. A high concentration of the industry in the region represents an existing presence in the market and a common linkage with the industry, justifying relocation or location of a regional office. The target market for each of the finalist industries is presented on the individual Industry Opportunity sheets presented following this discussion.

The regional location quotient analysis is presented in Screen No. 3.

#### SCREEN NO. 4

##### ■ Analyze industry financial resources.

The value of analyzing industry financial resources is the ability to eliminate industries that are not large enough to warrant attention. On a national basis, the number of companies with sales of \$1 million or more, were analyzed. A minimum of 1,000 companies for a two digit SIC Code, 500 companies for a three digit SIC Code and 50 companies for a four digit SIC Code in the Dun & Bradstreet Million Dollar Directory were used as a measure of each industry or business group in order to verify their size and financial capability for new investment.

SIC Code	Industry Description	No. of Million \$ Companies
24	Lumber and Wood Products, Except Furniture	2,580
243	Millwork, Veneer, Plywood et. al	655

Still using the same industries from the previous examples, both industries will survive this screen since they maintain more than enough million dollar companies.

The analysis of financial resources is presented in Screen No. 4.

Note: It is important to note that throughout the screening process, several qualitative measures are also incorporated into the analysis resulting in the selection of specific industries which do not technically survive the screen, but are reasonable to consider for further analysis. Conversely, surviving industries may also be deleted, based on additional qualitative information regarding the industry or the market.

#### SCREEN NO. 5

##### ■ *Test finalist industries for reasonableness.*

As explained previously, the initial universe of industries selected for the target analysis was derived from a review of reported growth industries within the regions of which Montana is a part. Industries identified as potential growth industries within the State of Montana were obtained from the Montana Department of Labor & Industry. In order to test the final industries which survived the screening analysis for reasonableness, each surviving industry and business opportunity was analyzed within the context of those industries projected to grow in Montana over the near future. Among the finalist industries, over 60 percent, or 14, were identified by the State of Montana as exhibiting the potential for growth over the period from 1990 to 1997. Those industries which did not occur on the Department of Labor & Industry list, but that survived the screening analysis, were retained because of their presence in the region and potential for attraction to the area.

Those industries identified by the Montana Department of Labor & Industry as exhibiting potential for future growth are presented in Screen No. 5.

#### SCREEN NO. 6

##### ■ *List of finalist industries.*

A list of industries and business opportunities is presented in Screen No. 6.

## SCREEN NO. 7A AND 7B

### ■ *Target Markets for Industry Recruitment*

Based on the results of the Business Location Profile Analysis as well as Target Industry Analysis, it was determined that in addition to identifying specific target industry groups it was necessary to identify specific geographic areas outside of the region with an intense concentration of the finalist industries. Based on discussions with local and state economic development representatives, as well as Leland Consulting Group's national experience with similar studies, 10 states known to have a concentration of these industries were identified. The number of establishments among these States were compared and the State with the largest concentration identified. When California was identified as the State with the greatest concentration, the number of establishments within: Los Angeles, Orange, San Francisco and Santa Clara Counties was compared in order to allow for a more targeted marketing effort.

A summary of the number of establishments within each of the finalist industries within the selected States and California Counties is presented in Screens No. 7A and No. 7B.

## INDUSTRY OPPORTUNITY FACT SHEETS

Finalist target industries identified through Screens No. 1 through No. 6 were then analyzed individually and in detail in order to understand current industry conditions, as well as identify potential market opportunities for the Missoula area and Airport Development Park. This analysis relied on published data sources such as trade journals, the U.S. Industrial Outlook, Occupational Outlook Handbook, various periodicals and regional and state economic development representatives. An emphasis was placed on future growth trends since they represent a better definition of opportunities within the changing United States economy. This additional research was conducted in order to update the empirical analysis in previous steps and strengthen the practical business perspective of the target industry selection process.

This detailed analysis of the finalist industries is presented in the Industry Opportunity Fact Sheets following this discussion. The fact sheets are designed for use by individuals marketing either the Missoula Airport Development Park or another site within the Missoula area. Information presented on the fact sheets include: the industry's average employment size, a figure which can be used for preliminary facility size planning; Montana and United States wage rates for the industry; identification of the industry's regional concentration; a target market for future attraction efforts; description of typical facility types; industry description; and discussion of trends in the industry.

## Industry Clusters

During the November meeting of the Development Advisory Board, the subject of Michael Porter's work with "Industry Clusters" was raised. Several suggestions were offered regarding possible methods for incorporating the theories of industry clustering into the target industry analysis. After some thoughtful consideration, as well as discussions with Larry Swanson and Ron Klaphake, we contacted the Executive Office of Economic Affairs for the Commonwealth of Massachusetts, a division of the Massachusetts state government which has incorporated the industry clustering method into their economic development work. As explained simply by representatives of the Massachusetts Office of Economic Affairs, the theory behind industry clustering is, "Not to ignore the stuff that makes the overall cluster happen." Specifically, Porter's theory is founded on research which indicates that states and nations with clusters of specific or similar industry groups exhibit a competitive advantage in business and government. Each industry is supported by other industries and the clustering of these industries can provide operating and location advantages to businesses.

In an effort to bring these two "schools of thought" together, we added an additional step to the analysis. First, the surviving industries were grouped into one of eight business categories or "clusters." Second, we developed a list of "Supporting Industries" which might not have otherwise survived the traditional target industry analysis, but which create value for the clusters. The Industry Opportunity Fact Sheets and list of "Supporting Industries" are presented following this discussion. The business categories or "clusters" used are as follows.

- Value-Added Fabrics
- Food and Beverage Production
- Building Materials
- Tools of Technology
- Transportation
- Business Support
- Recreation and Sporting Goods
- Entrepreneur

## CONCLUSION

The industries and business groups that have been identified as having potential for local investment reflect the competitive advantages of the Missoula market area. These industry groups show potential for future growth in sales and employment, both regionally and nationally, and they are considered compatible with the Missoula area market. It is important to reiterate at this point that the value of the target industry analysis is that it provides direction to future marketing efforts and assists in defining the project theme and supporting land uses and services within a planning area. The likelihood of all of these industries locating within the Missoula Airport Development Park is extremely remote. The potential for one or a combination of these industries is greater. However, the potential for any of these industries or a similar industry within their industry group to locate within either the Development

Park or Missoula area is very possible, given the similarities of location criteria among the various industry groups. Thus, the value of the target industry analysis as it impacts the master plan for the Development Park is significant.

The table on the following page illustrates the compatibility of each of the surviving industries for location within the Park.



# INDUSTRY OPPORTUNITY FACT SHEETS

# INDUSTRY OPPORTUNITY KEY

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<i>SIC Code</i>	Standard Industrial Classification Code and Name
<i>Average Employment</i>	Average number of employees per establishment in this industry group.
<i>Average Annual Wage</i>	<p>Montana: Average wage paid by Montana employers in this industry. Figure represents the two digit industry classification code wage rate in 1992.</p> <p>U.S.: Average wage paid nationally by employers in this industry. Figure presented reflects actual 1990 wage for that industry classification.</p>
<i>Regional Concentration</i>	State which exhibits a significant concentration of the industry. The state(s) identified are a viable target for future marketing efforts by Economic Development professionals.
<i>Facility Type</i>	Type of facility most appropriate to accommodate described business activities.
<i>Industry Description</i>	Definition for the industry as per the Standard Industrial Classification Manual.
<i>Trends</i>	Current information on the industry as reported by trade journals, periodicals and industry sources.
<i>Opportunities</i>	Discussion of locational advantages for this industry, as well as identification of general and specific tenant and related business opportunities.

# VALUE-ADDED FABRICS

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# INDUSTRY OPPORTUNITY

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SIC Code:	239	Miscellaneous Fabricated Textile Products
	2393	Textile Bags
	2394	Canvas and Related Products
Average Employment:	29 (SIC 239)	
	31 (SIC 2393)	
	14 (SIC 2394)	
Average Annual Wage:		
	Montana	\$14,143
	United States	\$17,680 (SIC 239)
		\$15,496 (SIC 2393)
		\$17,368 (SIC 2394)
Regional Concentration:	Utah	
Target Market:	California -- Los Angeles County	
Facility Type:	Manufacturing / Warehouse	
Industry Description	Establishments producing clothing and fabricating products by cutting and sewing purchased woven or knit textile fabrics and related materials such as leather, rubberized fabrics, plastics and furs. (SIC: 239)	
	Establishments primarily engaged in manufacturing shipping and other industrial bags from purchased fabrics. (SIC: 2393)	
	Establishments primarily engaged in manufacturing awnings, tents and related products from purchased fabrics. (SIC: 2394)	
Trends	The apparel and textile products industry consists primarily of firms that produce wearing apparel, with the production of textile products representing a growing 27 percent of this industry group.	
	Consumer confidence in 1992 drove industry shipments up by nearly one percent after several years of decline. Shipments of fabricated textile products, particularly canvas goods, increased about three percent in current dollars during this time. The strong performance in	

canvas products is attributed to growth in residential construction and home furnishings.

Although fabricated textile product manufacturers are increasingly incorporating computer technologies to increase quality and productivity, employment in the textile industry remains relatively labor intensive, with production workers representing approximately 80 percent.

#### *Opportunities*

Growth in the United States apparel and textile products industry is expected to continue over the next several years. Factors contributing to this growth include higher consumer spending and housing starts, changing demographics and growth in international trade and investment.

The subject property offers a favorable location for apparel and textile production facilities given its proximity to transportation resources, a skilled labor force and the Canadian border. In 1992, exports of apparel and fabricated textile products grew from more than two percent of product shipments in 1987 to more than seven percent in 1992. During this time, shipments to Mexico and Canada accounted for more than 55 percent of total SIC 239 exports. With the passage of NAFTA, apparel trade is expected to increase among these three countries.

# FOOD & BEVERAGE PRODUCTION

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The Food & Beverage Production section of the Master Plan & Strategic Implementation Plan for the Missoula Airport Development Park, Missoula County, Montana, is a key component of the overall development. This section outlines the goals, objectives, and strategies for the development of the Food & Beverage Production area, which is intended to provide a high-quality, sustainable, and profitable environment for the production and distribution of food and beverage products.

The Food & Beverage Production area is a key component of the overall development, and it is intended to provide a high-quality, sustainable, and profitable environment for the production and distribution of food and beverage products. The development of this area is a key component of the overall development, and it is intended to provide a high-quality, sustainable, and profitable environment for the production and distribution of food and beverage products.

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# INDUSTRY OPPORTUNITY

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<i>SIC Code:</i>	2083	Malt
<i>Average Employment:</i>	54	
<i>Average Annual Wage:</i>		
<i>Montana</i>	\$22,531	
<i>United States</i>	\$34,996	
<i>Regional Concentration:</i>	Idaho	
<i>Target Market:</i>	Minnesota	
<i>Facility Type:</i>	Manufacturing	
<i>Industry Description</i>	Establishments primarily engaged in manufacturing malt or malt byproducts from barley or other grains.	
<i>Trends</i>	<p>The alcoholic beverage industry sector includes manufacturers of malt beverages, mainly beer, wines and brandy, and distilled spirits except brandy. This sector does not include importers, wholesalers or retailers of alcoholic beverages.</p> <p>Malt beverage industry shipments rose more than three percent to exceed \$16 billion in 1992. Adjusted for inflation, the value of beer industry shipments rose an estimated 2.3 percent for the year while the value of wine and brandy industry shipments rose fractionally.</p> <p>The most significant trend facing the alcoholic beverages industry began in 1992 when representatives of the United States and Canada worked to bring beer policies and practices within both countries into compliance with tariff and trade agreements.</p>	
<i>Opportunities</i>	<p>The opportunity for malt beverage and the production of malt by-products within the property exists primarily because of its proximity to barley producers. Montana is number two in the nation for production of barley, a principal ingredient in the production of malt beverages and products.</p> <p>U.S. alcoholic beverage producers are facing heightened competition among domestic producers, as well as an increasingly difficult international marketplace. Further</p>	

pressure is being placed on the industry due to a declining home market, which is principally the result of the debate about its affect on health and substance abuse. However, a compelling upward trend in the industry is the growth of the microbrewery. Malt beverage producers are expected to benefit from this consumption and entertainment trend throughout the current decade.



# INDUSTRY OPPORTUNITY

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<i>SIC Code:</i>	209	Miscellaneous Food Preparations and Kindred Products
<i>Average Employment:</i>	42	
<i>Average Annual Wage:</i>		
<i>Montana</i>	\$22,531	
<i>United States</i>	\$22,412	
<i>Regional Concentration:</i>	Idaho	
<i>Target Market:</i>	California -- Los Angeles County	
<i>Facility Type:</i>	Manufacturing	
<i>Industry Description</i>	Establishments manufacturing or processing foods and beverages for human consumption, certain related products, and prepared feeds for animals and fowls.	
<i>Trends</i>	<p>Specific food preparations within this group include canned and prepared fish and seafood; roasted coffee; potato chips, corn chips and similar snacks; macaroni, spaghetti, vermicelli and noodles; and dry packaged foods for preparation at home. These preparations include most of the high value-added packaged food products in the industry.</p> <p>The food and beverage industry is growing. As of 1992, it surpassed the transportation industry as the nation's largest major manufacturing sector. Along with this growth, the nature of the United States food production industry is changing from a mass market to many niche or specialty markets. According to a 1991 Kansas City Federal Study, this evolution in the industry and shift to smaller food market niches are principally attributed to a growing nutrition-based conscience, as well as changing lifestyles and demographics.</p>	
<i>Opportunities</i>	Food processing is a sector with stable demand and employment relative to more volatile natural resource industries. It is an industry that is well represented among the northern states of Minnesota, the Dakotas, Montana and Idaho. One in nine manufacturing workers in Montana is employed within the food processing industry.	

A food production facility within the property would be complementary to a variety of other uses and an attractive addition to the Missoula area economy. Innovative value-added specialty food products tend to be relatively labor-intensive. They require skilled employees for production, product development and marketing. They also retain higher value due to relatively low transportation costs.

# BUILDING MATERIALS

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# INDUSTRY OPPORTUNITY

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SIC Code: 24 Lumber and Wood Products, Except Furniture

Average Employment: 21

Average Annual Wage:  
Montana \$25,293  
United States \$20,696

Regional Concentration: Idaho

Target Market: California -- Los Angeles County

Facility Type: Heavy Industrial

*Industry Description* Establishments engaged in cutting timber and pulpwood; merchant sawmills, lath mills, shingle mills, stock mills, planing mills, plywood mills and veneer mills engaged in producing lumber and wood basic materials; and establishments engaged in manufacturing finished articles made entirely or mainly of wood or related materials.

*Trends* On a national level, timber and wood products industry shipments are expected to increase approximately one percent in 1994. This modest rate of growth is primarily attributed to significant reduction in timber harvesting in the Pacific Northwest, necessitating an increase in imports from Canada.

At the state level, timber harvest restrictions have forced the closure and reorganization of several mills, forcing industry participants to refocus (where possible) their efforts to opportunity sectors within the industry, including exports of value-added wood products. Montana exports of lumber and wood products to Canada and the Middle East increased 8.78 percent and 8.89 percent, respectively between 1987 and 1992. Among the products within this industry group, ready-to-assemble log homes are very popular in Asian markets. According to a report by the Federal Reserve Bank of Minneapolis, lumber and wood products are the fourth-largest market for exports from Montana. Asia's preference for red cedar versus domestically used pines makes this a lucrative industry.

Lumber prices rose 35 percent in 1993 and will rise another 15 to 20 percent in 1994. With demand from homebuilding growing (1.2 million starts projected in 1994) and supplies tightening, this trend is expected to continue for the near term.

#### *Opportunities*

While the lumber and wood products industry continues to present itself as a growth industry in the region, specific opportunities within the property, given its location and potential for a mix of tenant uses, will most likely be concentrated in value-added wood products described on the following Industry Opportunity fact sheet.

# INDUSTRY OPPORTUNITY

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SIC Code: 243 Millwork, Veneer, Plywood and Structural Wood Members

Average Employment: 30

Average Annual Wage:

Montana \$25,293

United States \$21,632

Regional Concentration: Idaho

Target Market: California -- Los Angeles

Facility Type: Manufacturing

Industry Description

Establishments primarily engaged in manufacturing fabricated wood millwork, including wood millwork covered with materials such as metal and plastics; wood kitchen cabinets and wood bathroom vanities. Producers of commercial hardwood veneer and those primarily engaged in manufacturing commercial plywood or prefinished hardwood plywood, commercial softwood veneer and plywood, from veneer produced in the same establishment or from purchased veneer; laminated or fabricated trusses, arches, and other structural members of lumber.

Trends

Lower interest rates have resulted in an increase in housing starts, residential repair, remodeling and home improvement projects via cash from refinancing. This has fostered the growth of the millwork industry and increased demand for its primary commodities. Doors represent approximately 30 percent of the industry's total shipments, followed by windows at 26 percent.

Sales of millwork products are expected to grow through 1998. With prospects tied directly to economic growth via interest rates and housing starts, product shipments are expected to rise three percent in 1994 and level off to two percent annually throughout the remainder of the decade.

### *Opportunities*

Millwork operations within the property will need to be environmentally sensitive with regard to noise and by-products. Opportunities will probably be concentrated among producers of specialty products and other value-added wood products.

# INDUSTRY OPPORTUNITY

---

SIC Code: 324 Cement, Hydraulic

Average Employment: 95

Average Annual Wage:

Montana \$25,426

United States \$35,516

Regional Concentration: Utah

Target Market: California -- Santa Clara County  
Texas

Facility Type: Heavy Industrial

Industry Description

Establishments primarily engaged in manufacturing hydraulic cement, including Portland, natural, masonry and pozzolana cements.

Trends

Demand for hydraulic cement rose with the growth in new residential and public works construction, offsetting less demand from the commercial construction industry. According to industry experts, cement, through its use in concrete, is used in all types of construction. More than half of cement shipped is used in building construction: 22 percent residential, 11 percent public, 19 percent commercial and three percent farm. (*U.S. Industrial Outlook*)

Opportunities

Increased residential construction will drive demand for this building materials segment as well. In addition, public infrastructure projects locally and regionally will provide increased opportunities for cement facilities in the market.

Note: In a recent discussion with a local lending organization, their representative mentioned a concrete block start-up company interested in a location within the Development Park.



# TOOLS OF TECHNOLOGY

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# INDUSTRY OPPORTUNITY

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<i>SIC Code:</i>	3572 3577	Computer Storage Devices Computer Peripheral Equipment, Not Elsewhere Classified
<i>Average Employment:</i>	20	
<i>Average Annual Wage:</i>		
<i>Montana</i>	\$21,769	
<i>United States</i>	\$34,788 (SIC 3572) \$36,972 (SIC 3577)	
<i>Regional Concentration:</i>	Colorado (SIC 3572) Idaho (SIC 3577)	
<i>Target Market:</i>	California -- Santa Clara County	
<i>Facility Type:</i>	Light Industrial / R&D	
<i>Industry Description</i>	Establishments primarily engaged in manufacturing computer storage devices including disk drives, magnetic storage devices, optical storage devices and tape recorders for computers. (SIC: 3572)	
	Establishments primarily engaged in manufacturing computer peripheral equipment not elsewhere classified, including printers, plotters and graphic displays. (SIC: 3577)	
<i>Trends</i>	Unit shipments of computer equipment in 1993 were up 26 percent, and will rise another 10 percent in 1994. This forecast will indicate three years of recovery following the 1990-91 recession. Most notable were purchases by United States businesses reflecting a continued move toward automation and production efficiency. According to a 1992 survey by the Automation Forum and reported in the U.S. Industrial Outlook, business investment in automation since 1989 increased 23 percent with spending of \$2.1 billion, or \$20,220 per production worker.	
	With research and development a critical component to the growth of this industry, U.S. computer firms increased R&D spending by four percent in 1992.	

### *Opportunities*

In addition to the necessity for proximity to research facilities and expertise, another critical factor to the success of computer design and production companies is their ability to move freely to other markets. While several small entrepreneurial firms develop in second-tier and secondary metropolitan areas, access to major markets via air transportation is critical.

The Development Park's location, adjacent to the Missoula Airport, will be considered an advantage by companies looking to locate or expand in the Missoula market; however, the reduction in service by major air carriers and limited direct hub connections will need to be offset in marketing efforts by emphasizing the advantages of a skilled work force and high quality-of-life.

# INDUSTRY OPPORTUNITY

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**SIC Code:** 367 Electronic Components and Accessories

**Average Employment:** 92

**Average Annual Wage:**

Montana \$20,263

United States \$30,940

**Regional Concentration:** Idaho

**Target Market:** California -- Santa Clara County

**Facility Type:** Light Industrial / Warehouse

**Industry Description**

Establishments primarily engaged in manufacturing electron tubes and tube parts, printed circuit boards, semiconductors and related solid-state devices (semiconductor diodes and stacks, transistors, solar cells, and light sensing and emitting semiconductor devices), electronic capacitors, resistors, inductors and connectors.

**Trends**

Electronic components are the "fundamental building blocks" for the electronics industry. Shipments by the electronic components industry rose 11 percent in 1993 and are forecasted to grow 9 percent in 1994. Support for this industry is tied to increased demand for computer and communications equipment.

As is the case for several of the industries identified in this analysis, Canada and Mexico are the United States' principal trading markets for electronic goods. Impacting the United States' competitive position in the electronics industry is the high cost of production in the U.S. versus South Korea, Malaysia and Taiwan. Historically, U.S. firms established production and assembly facilities in Mexico, exporting the finished products back to the United States. The passage of NAFTA is expected to impact these practices and increase the ease of moving these goods across North American borders.

### *Opportunities*

This industry is characterized by light assembly, relatively clean industrial operations. It can be employment intensive and a profitable outlet for technology transfer from the state's higher education institutions.

# INDUSTRY OPPORTUNITY

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**SIC Code:** 38 Measuring, Analyzing and Controlling Instruments

**Average Employment:** 67

**Average Annual Wage:**  
Montana \$21,227  
United States \$34,736

**Regional Concentration:** Colorado

**Target Market:** California -- Los Angeles County

**Facility Type:** Light Industrial / R&D

**Industry Description** Establishments engaged in manufacturing instruments (including professional and scientific) for measuring, testing, analyzing, and controlling; and their associated sensors and accessories; optical instruments and lenses, surveying and drafting instruments; hydrological, hydrographic, meteorological, and geophysical equipment; search detection, navigation and guidance systems and equipment; surgical, medical and dental instruments, equipment, and supplies; ophthalmic goods; photographic equipment and supplies; and watches and clocks.

**Trends** Companies which support design and production of instruments in this industry include computers, computer software, office-equipment and biotechnology. Growing trends towards more accuracy in measurement and augmenting computer networks provide the impetus for growth within this industry.

Stronger environmental requirements are forcing manufacturers to improve the quality of their production processes through such instrumentation. Additional markets which rely heavily upon production of these devices include the pharmaceutical, food processing, petroleum and chemical industries.

U.S. companies supply more than 70 percent of Canada's purchases of analytical instruments. Reasons cited include geographic proximity and similarities in research methods.

### *Opportunities*

Production of instruments, particularly medical, is a viable industry for location within the park and Missoula area since this industry does not require immediate access to its markets and the products can be shipped fairly easily.

New marketing opportunities between Canada and the United States include applications in telecommunications and related information technologies.

# INDUSTRY OPPORTUNITY

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<i>SIC Code:</i>	384	Surgical, Medical and Dental Instruments and Supplies
	3841	Orthopedic, Prosthetic and Surgical Appliances and Supplies
<i>Average Employment:</i>	51 (SIC 384)	
	59 (SIC 3841)	
<i>Average Annual Wage:</i>		
<i>Montana</i>	\$21,227	
<i>United States</i>	\$30,628 (SIC 384)	
	\$31,096 (SIC 3841)	
<i>Regional Concentration:</i>	Utah	
<i>Target Market:</i>	California -- Los Angeles and Orange Counties	
<i>Facility Type:</i>	Light Industrial / R&D	
<i>Industry Description</i>	<p>Establishments primarily engaged in manufacturing medical, surgical, ophthalmic and veterinary instruments and apparatus; orthopedic, prosthetic, and surgical appliances and supplies; dental equipment and supplies; x-ray apparatus and tubes and related irradiation apparatus; and electromedical and electrotherapeutic apparatus. (SIC: 384)</p> <p>Establishments primarily engaged in manufacturing medical, surgical, ophthalmic, and veterinary instruments and apparatus. (SIC: 3841)</p>	
<i>Trends</i>	<p>Manufacturers of these products are forecasted to increase their shipments by nine percent in 1994, up from eight percent in 1993. Increases in the industry are attributed to a variety of factors, including governmental pressure to reduce health care expenditures.</p> <p>Production of high-quality medical devices that reduce or eliminate costly surgery and long hospital stays are growing, i.e., in-home health care devices for the senior population and individuals who have contracted infectious diseases. The spread of AIDS in the U.S. and abroad has intensified demand for disposable products such as test kits and disposables used in blood transfusions.</p>	



### *Opportunities*

The prevalence of biotechnical research throughout the state will create opportunities for near-by medical device manufacturing facilities. Similar to its dispersed market, these manufacturers of specialty medical apparatus do not require proximity to any specific geographic areas.

# TRANSPORTATION

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# INDUSTRY OPPORTUNITY

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*SIC Code:* 37 Transportation Equipment

*Average Employment:* 177

*Average Annual Wage:*

Montana \$19,646

United States \$36,920

*Regional Concentration:* Washington

*Target Market:* California -- Los Angeles County

*Facility Type:* Manufacturing

*Industry Description*

Establishments engaged in manufacturing equipment for transportation of passengers and cargo by land, air and water. Products include motor vehicles, aircraft, guided missiles and space vehicles, ships, boats, railroad equipment, and miscellaneous transportation equipment, such as motorcycles, bicycles, and snowmobiles.

*Trends*

The transportation equipment and parts industry is a significant component to the United States economy, employing nearly 6.2 percent of all U.S. nonfarm employment. Expenditures by individuals, business and government agencies for motor vehicles and parts represented approximately 41 percent of all durable good purchases, five percent of the public's total consumption expenditures and 4.5 percent of total disposable income.

A notable trend within the industry surrounds vehicle emissions levels and an interest in designing vehicles with greater fuel efficiency standards. Cooperative research projects between government and industry were initiated by President Clinton in 1993 to develop advanced manufacturing techniques that will reduce production and use impacts.

*Opportunities*

The presence of transportation equipment manufacturers in the Northwest is traditionally attributed to water-related modes of transportation and recreational vehicles. In addition, there is already a significant level of East-West trucking activity in the

state, and this activity will only increase with more North-South activity due to NAFTA. Opportunities within the subject property may present themselves as small facilities providing parts as "just in time" suppliers to manufacturing and repair segments of the industry or as satellite facilities with limited production requirements.

# INDUSTRY OPPORTUNITY

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<i>SIC Code:</i>	423	Terminal and Joint Terminal Maintenance Facilities for Motor Freight Transportation
<i>Average Employment:</i>	18	
<i>Average Annual Wage:</i>		
<i>Montana</i>	\$23,942	
<i>United States</i>	\$26,728	
<i>Regional Concentration:</i>	NA	
<i>Target Market:</i>	NA	
<i>Facility Type:</i>	Warehouse	
<i>Industry Description</i>	Establishments primarily engaged in the operation of terminal facilities used by highway-type property carrying vehicles. Also included are terminals which provide maintenance and service for motor vehicles.	
<i>Trends</i>	More firms are taking advantage of lower fuel costs and impending rate increases, which is increasing volume and profitability of trucking firms.	
<i>Opportunities</i>	<p>Trucking and related warehousing operations have long been identified as an opportunity industry for the state of Montana and Missoula area. As shipments pass through the area, with switching points throughout the state, opportunities for repair and maintenance facilities, as well as warehousing facilities to store goods will continue to rise.</p> <p>Additional support for the industry will come with the evolution of reduced trade tariffs with Canada and Mexico. Missoula's proximity to the Canadian border will make this market a logical location for these facilities. Trucking and warehousing as an industry is expected to grow by 1.48 percent during the period from 1990 to 1997.</p>	

# BUSINESS SUPPORT

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# INDUSTRY OPPORTUNITY

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<i>SIC Code:</i>	615	Business Credit Institutions
<i>Average Employment:</i>	24	
<i>Average Annual Wage:</i>		
<i>Montana</i>	\$27,465	
<i>United States</i>	\$35,308	
<i>Regional Concentration:</i>	Arizona	
<i>Target Market:</i>	California -- Los Angeles County	
<i>Facility Type:</i>	Office / Administrative	
<i>Industry Description</i>	Establishments primarily engaged in making loans to agricultural and other business enterprises, excluding those engaged principally in home or personal financing.	
<i>Trends</i>	<p>1994 will begin to see a modest increase in assets among financial institutions, a reversal from steep declines throughout the latter half of the 1980s and early 1990s. Especially beneficial to lending institutions was the widening spread between interest rates charged for loans and paid for deposits, in 1993, and stricter lending requirements imposed to guard against too-risky real estate-related assets.</p> <p>An evolutionary change facing banks and savings institutions is the move toward regional bank holding companies that operate independent depository, commercial and consumer lending, mortgage lending and mortgage servicing, insurance and securities units.</p> <p>Community development banking also increased in popularity in 1993. Federal lending institution regulators increased lending to lower income communities and gathered information on ways to increase lending in these markets.</p>	
<i>Opportunities</i>	Although the location of this valuable business service in the property could benefit tenants in the park, these institutions could be located anywhere in Missoula and still serve these companies.	

# INDUSTRY OPPORTUNITY

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SIC Code: 873 Research, Development and Testing Services

Average Employment: 26

Average Annual Wage:

Montana \$27,412

United States \$34,008

Regional Concentration: Idaho

Target Market: California -- Los Angeles

Facility Type: Office

## Industry Description

Establishments primarily engaged in providing research, development, and testing services including commercial physical and biological research, commercial economic, sociological and education research; noncommercial research organizations, and testing laboratories.

## Trends

On a national level, the professional services industry is expected to exhibit moderate growth in 1994. However, in communities such as Missoula, which are destination communities for both the telecommuting professional and entrepreneurs, these services are expected to grow rapidly. This trend is evident throughout the State of Montana with recent increases in the number of financial, legal, advertising, management and research service organizations.

## Opportunities

The evolution of Montana from a principally resource-based economy to a more diversified economy offer increased opportunities for research and testing service firms which can assist with the transition. Specific opportunities include: environmental research and consulting firms which address past impacts of mining, nuclear testing and other environmentally imposing processes. The growth of biotechnology in universities and firms throughout the state will provide opportunities for new affiliations and technology transfer.



# INDUSTRY OPPORTUNITY

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<i>SIC Code:</i>	86 79	Membership Organizations Amusement and Recreation Services
<i>Average Employment:</i>	9 (SIC 86) 14 (SIC 79)	
<i>Average Annual Wage:</i>		
<i>Montana</i>	\$13,988 (SIC 86) \$10,008 (SIC 79)	
<i>United States</i>	\$15,756 (SIC 86) \$15,444 (SIC 79)	
<i>Regional Concentration:</i>	Arizona (SIC 865) Colorado (SIC 79)	
<i>Target Market:</i>	California -- Los Angeles	
<i>Facility Type:</i>	Office	
<i>Industry Description</i>	<p>Organizations operating on a membership basis for the promotion of the interest of their members. Included are organizations such as trade associations, professional membership organizations, labor unions and similar labor organizations, and political and religious organizations. (SIC: 86)</p> <p>Establishments engaged in providing amusement or entertainment services, not elsewhere classified including commercial sports promoters, physical fitness facilities, coin-operated amusement devices and membership sports and recreation clubs. (SIC: 79)</p>	
<i>Trends</i>	<p>Membership and recreation service organizations, as industries, do not typically survive the traditional screening methodology as service-based establishments with a limited number of employees working for lower wages. Unlike manufacturing industries, membership organizations do not produce capital goods, but rather provide services to their members. However, it is these characteristics that make it a viable industry for Montana and the region.</p> <p>Membership organizations tend to locate where there are intense concentrations of members. They are not limited by distance to consumer markets. In the same</p>	

way that technology advances are allowing professionals to establish businesses in smaller metropolitan centers, member organizations have the luxury of selecting a desirable living environment versus an accessible one.

#### *Opportunities*

Opportunities for membership organizations within the Missoula area market are further supported by their increasing presence in recent years. Montana and Missoula's greatest asset is its people and its quality of life. These two factors play heavily in the location decision among membership organizations.

Obvious "cluster" opportunities among membership organizations include environmentally conscious groups, outdoor recreation groups and value-added natural resource groups.

# INDUSTRY OPPORTUNITY

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<i>SIC Code:</i>	8331	Job Training and Vocational Rehabilitation Services
<i>Average Employment:</i>	42 (SIC 833)	
<i>Average Annual Wage:</i>		
<i>Montana</i>	\$10,854	
<i>United States</i>	\$13,468	
<i>Regional Concentration:</i>	Idaho	
<i>Target Market:</i>	California -- Contacts for experience gained.	
<i>Facility Type:</i>	Public Education Facility	
<i>Industry Description</i>	Establishments primarily engaged in providing manpower training and vocational rehabilitation and rehabilitation services for the unemployed, the underemployed, the handicapped, and to persons who have a job market disadvantage because of lack of education, job skill or experience.	
<i>Trends</i>	<p>The education and training industry accounted for nearly eight percent of the gross domestic product (GDP) in 1993 and is expected to increase at a rate of approximately six percent in 1994. Corporate spending for training amounted to approximately \$1 of every \$15 of educational and training expenditures in 1993. Factors contributing to the growth in vocational education and training (and retraining) include: the restructuring of corporate America, technological innovation in manufacturing processes, displacement of workers in primary industries (especially natural resource industries), an increasingly global economy and increased competition among nations.</p> <p>A growing segment of manufacturers, including fabricated metal, industrial machinery, electronic equipment and instruments and transportation equipment, use computer technology in their manufacturing process, requiring a higher level of training for their workers.</p>	

### *Opportunities*

The market currently offers vocational education training at two campuses in the Missoula area. These educational centers provide instruction to students entering and reentering the work force, develop programs in response to Montana businesses and offer customized training programs which are responsive to technological advances.

The market does not offer either a community college system or a satellite campus affiliated with the University of Montana. As reported by economic development experts throughout the country, the best economic development programs are those that build the human and social infrastructure of a community. On-site instruction within a business park is a valuable marketing tool for attracting future tenants.

# RECREATION & SPORTING GOODS

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# INDUSTRY OPPORTUNITY

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SIC Code:	375	Motorcycles, Bicycles and Parts
	379	Miscellaneous Transportation Equipment
Average Employment:	51 (SIC 375) 49 (SIC 379)	
Average Annual Wage:		
Montana	\$19,646	
United States	\$26,416 (SIC 375) \$21,944 (SIC 379)	
Regional Concentration:	NA	
Target Market:	California -- Los Angeles	
Facility Type:	Manufacturing	
Industry Description	<p>Establishments primarily engaged in manufacturing motorcycles, bicycles, similar equipment and parts.</p> <p>Establishments primarily engaged in manufacturing travel trailers and campers for attachment to passenger cars or other vehicles, pickup coaches (campers) and caps(covers) for mounting on pickup trucks. Also included are establishments primarily engaged in manufacturing transportation equipment, not elsewhere classified, including powered golf carts, snowmobiles, trailer hitches, etc.</p>	
Trends	<p>Constant-dollar product shipments of bicycles and parts increased an estimated five percent in 1993, while exports grew about 17 percent. The industry saw its biggest increase during the period from 1988 to 1991, when exports of bikes and parts increased at a compound annual rate of 104 percent. This activity has slowed considerably with a rate increase of eight percent between 1992 and 1993.</p> <p>While the consumption of bicycles and other sporting goods is considered a discretionary purchase, thus directly tied to disposable personal income, the growth of the market is typically tied to the health of the overall economy. However, bicycling continued to grow throughout the past recession as the third most popular</p>	

sporting activity, according to the National Sporting Goods Association.

### *Opportunities*

Two factors favoring the growth of the industry are an increased environmental conscience and the passage of NAFTA. Several environmental groups are actively soliciting individuals to ride their bikes to work. This option is even more feasible in growing metropolitan areas similar to Missoula, the destination of the telecommuter. With exports continuing to be the fastest growing segment of the industry, a reduction in tariffs on imported parts and exported bikes, will increase opportunities for manufacturers.

As Missoula and Montana become increasingly recognized by the bicycling community as a recreation and training location, the number of suppliers and designers will look more closely at opportunities for production in these markets. This was the case of the windsurfing industry in the Columbia River Gorge area of Washington and Oregon. The "Gorge" as it is referred to by windsurfing enthusiasts, is the number two spot in the nation for the sport, second only to Hawaii. As the number of windsurfers visiting the Gorge increased consistently throughout the 1980s, windsurfing design and production companies began to relocate their facilities. This provided a locational advantage in that testing facilities were readily accessible. Communities in Montana should expect to see a similar trend over the near term within the bicycling industry.

# ENTREPRENEUR

MONTHLY MAGAZINE

The Entrepreneur is a monthly magazine that provides information and inspiration for entrepreneurs. It covers a wide range of topics, including business news, financial advice, and marketing strategies. The magazine is published by Entrepreneur Media, Inc. and is available in both print and digital formats. It is a valuable resource for anyone looking to start or grow a business.

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# INDUSTRY OPPORTUNITY

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<i>SIC Code:</i>	Entrepreneurial Companies - Variety
<i>Facility Type:</i>	Industrial/Office Condominium / Incubator
<i>Industry Description</i>	Establishments primarily engaged in the development and distribution of products and services. These companies are typically in their infancy (0 to 5 years old) and highly cost sensitive.
<i>Trends</i>	<p>The growth of entrepreneurial companies in recent years is particularly notable as it relates to several demographic trends. The "Telecommuting Professional" and the "Lone Eagle" are two nicknames used to describe individuals who have moved their business from a primary urban market to a smaller metropolitan center through the assistance of telephones, faxes and computers. A significant number of these individuals operate their businesses from a home office, yet several others have brought with them a handful of employees and require minimal office and/or production space.</p> <p>Another demographic trend facilitating the growth of entrepreneurial companies is the combined impact of eliminating middle management from major corporate institutions with the migration out of urban areas, particularly throughout Southern California, by individuals of every age group. This trend is particularly notable among young retirees (55+) who are choosing to move to more desirable locations, and bringing with them surplus capital from the sale of their home in an inflated market. Together with a pension or early retirement buyout, these individuals are reentering the workforce as business owners.</p>
<i>Opportunities</i>	<p>Economic development is defined as a three-pronged goal: retention and/or expansion of existing business, attraction of new business and creation of new ones. Economic development specialists agree that efforts to retain and expand existing businesses, as well as grow new businesses, render the fastest results.</p> <p>Public and/or private development of incubator space and/or industrial condominium space which will accommodate entrepreneurial businesses within the Park is recommended.</p>

## SUPPORTING INDUSTRIES

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SIC Code: 281

### Industrial Inorganic Chemicals

Establishments primarily engaged in manufacturing basic industrial inorganic chemicals including alkalies and chlorine, industrial gases, inorganic pigments and other industrial inorganic chemicals.

Facility Type: Manufacturing

SIC Code: 3553

### Woodworking Machinery

Establishments primarily engaged in manufacturing machinery for sawmills, making particleboard and similar products; and for otherwise working with or producing wood products.

Facility Type: Manufacturing / Heavy Industrial

SIC Code: 422

### Public Warehousing and Storage

Establishments primarily engaged in the warehousing and storage of farm products; perishable goods under refrigeration; food products for processing, preparing, or packaging; and goods at foreign trade zones.

Facility Type: Warehouse

SIC Code: 503

### Lumber and Other Construction Materials

Establishments, with or without yards, primarily engaged in the wholesale distribution of rough, dressed, and finished lumber (but not timber); plywood; reconstituted wood fiber products; doors and windows and their frames (all materials); wood fencing; and other wood or metal millwork.

Facility Type: Warehouse

SIC Code: 5084

#### Industrial Machinery and Equipment

Establishments primarily engaged in the wholesale distribution of industrial machinery and equipment, not elsewhere classified, including woodworking machinery, cement-making machinery and textile machinery and equipment.

Facility Type: Warehouse

SIC Code: 509

#### Miscellaneous Durable Goods

Establishments primarily engaged in the wholesale distribution of sporting goods and accessories; games, toys, hobby goods and supplies, and related goods, such as fireworks and playing cards; jewelry, precious stones and metals, costume jewelry, watches, clocks, silverware, and jewelers' findings; musical instruments and forest products, except lumber. Also included are establishments engaged in assembling, breaking up, sorting, and wholesale distribution of scrap and waste materials.

Facility Type: Showroom / Warehouse

SIC Code: 513

#### Apparel, Piece Goods and Notions

Establishments primarily engaged in the wholesale distribution of piece goods or yard goods of natural or manmade fibers, notions (sewing and hair accessories, etc.), and other dry goods.

Facility Type: Showroom / Warehouse

SIC Code: 7376

#### Computer Facilities Management Services

Establishments primarily engaged in providing on-site management and operation of computer and data processing facilities on a contract or fee basis.

Facility Type: Office

# TARGET INDUSTRY SCREENS

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# SCREEN 1: GROWTH INDUSTRIES AMONG STATES IN THE REGION

## SIC Code Industry Description

### Montana:

700	Agricultural Services
800	Forestry
2300	Apparel and Other Finished Products
2500	Furniture and Fixtures
2700	Printing, Publishing and Allied Industries
2800	Chemicals and Allied Products
3000	Rubber and Misc. Plastic Products
3600	Electronic and Other Electrical Equipment and Components
3800	Measuring, Analyzing and Controlling Instruments
4100	Local and Suburban Transit & Interurban Highway Pass. Transp.
4200	Motor Freight Transportation and Warehousing
4500	Transportation by Air
4700	Transportation Services
4900	Electric, Gas and Sanitary Services
5000	Wholesale Trade, Durable Goods
5100	Wholesale Trade, Nondurable Goods
6000	Depository Institutions
6200	Security & Commodity Brokers, Dealers, Exchanges & Services
6300	Insurance Carriers
6400	Insurance Agents, Brokers & Service
6500	Real Estate
6700	Holding and Other Investment Offices
7300	Business Services
7900	Amusement and Recreation Services
8000	Health Services
8200	Educational Services
8300	Social Services
8600	Membership Organizations
8700	Engineering, Accounting, Research and Management Services

### Colorado:

2000	Food and Kindred Products
2200	Textile Mill Products

## SIC Code Industry Description

### Colorado, continued:

2300	Apparel and Other Finished Products
2500	Furniture and Fixtures
2600	Paper and Allied Products
2700	Printing, Publishing and Allied Industries
2800	Chemicals and Allied Products
3200	Stone, Clay, Glass and Concrete Products
3400	Fabricated Metal Products, Excp. Machine and Transport. Equip.
3800	Measuring, Analyzing and Controlling Instruments
4100	Local and Suburban Transit & Interurban Highway Pass. Transp.
4200	Motor Freight Transportation and Warehousing
4800	Communications
4900	Electric, Gas and Sanitary Services
5000	Wholesale Trade, Durable Goods
5100	Wholesale Trade, Nondurable Goods
6200	Security & Commodity Brokers, Dealer, Exchanges & Services
6300	Insurance Carriers
6700	Holding and Other Investment Offices
7300	Business Services
7900	Amusement & Recreation Services
8000	Health Services
8200	Educational Services
8300	Social Services
8600	Membership Organizations
8700	Engineering, Accounting, Research and Management Services

### Utah:

1700	Special Trade Contractors
5100	Wholesale Trade, Nondurable Goods
5300	General Merchandise Stores
5800	Eating & Drinking Places
7300	Business Services
7900	Amusement and Recreation Services
8000	Health Services

## SCREEN 1: GROWTH INDUSTRIES AMONG STATES IN THE REGION

### SIC Code Industry Description

#### Utah, continued:

8200	Educational Services
8300	Social Services
8700	Engineering, Accounting, Research and Management Services

#### South Dakota: Not Available

#### Idaho:

2000	Food and Kindred Products
2030	Canned, Cured and Frozen Foods
2400	Lumber and Wood Products
2450	Wood Building and Mobile Homes
2490	Misc. Wood Products
2600	Paper and Allied Products
2700	Printing, Publishing and Allied Industries
2800	Chemicals and Allied Products
3200	Stone, Clay, Glass and Concrete Products
3400	Fabricated Metal Products
3500	Industrial and Commercial Machinery and Computer Equipment
3600	Electronic and Other Electrical Equipment and Components
3900	Misc. Manufacturing industries
4200	Motor Freight Transportation and Warehousing
4900	Electric, Gas and Sanitary Services
5000	Wholesale Trade, Durable Goods
5100	Wholesale Trade, Nondurable Goods
6000	Depository Institutions
6100	Nondepository Institutions
6200	Security and Commodity Brokers, Dealers, Exchanges & Services
6300	Insurance Carriers
6400	Insurance Agents, Brokers and service
6500	Real Estate
6700	Holding and Other Investment Offices
7300	Business Services
7900	Amusement and Recreation Services
8000	Health Services
8060	Hospitals

### SIC Code Industry Description

#### Idaho, continued:

8700	Engineering, Accounting, Research and Management Services
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#### Washington:

2000	Food and Kindred Products
2200	Textile Mill Products
2500	Furniture and Fixtures
2700	Printing, Publishing and Allied Industries
2800	Chemicals and Allied Products
2900	Petroleum Refining and Related Industries
3400	Fabricated Metal Products
3500	Industrial and Commercial Machinery and Computer Equipment
3570	Computer and Office Equipment
3800	Measuring, Analyzing and Controlling Instruments
3900	Misc. Manufacturing Industries
4000	Railroad Transportation
4100	Local and Suburban Transit & Interurban Highway Pass. Transp.
4200	Motor Freight Transportation and Warehousing
4300	United States Postal Service
4400	Water Transportation
4500	Transportation by Air
4600	Pipelines, Except Natural Gas
4700	Transpiration Services
5000	Wholesale Trade, Durable Goods
5100	Wholesale Trade, Nondurable Goods
6000	Depository Institutions
6100	Nondepository Institutions
6200	Security and Commodity Brokers, Dealers, Exchanges & Services
6300	Insurance Carriers
6400	Insurance Agents, Brokers and service
6500	Real Estate
6700	Holding and Other Investment Offices
7300	Business Services
8000	Health Services
8200	Educational Services
8300	Social Services

# SCREEN 1: GROWTH INDUSTRIES AMONG STATES IN THE REGION

## SIC Code Industry Description

### Washington, continued:

8700 Engineering, Accounting, Research and Management Services

### Minnesota:

2720 Periodicals: Publishing or Publishing and Printing  
 4100 Local and Suburban Transit & Interurban Highway Pass. Transp.  
 4500 Transportation by Air  
 4700 Transpiration Services  
 5700 Home Furniture, Furnishings and Equipment Stores  
 6100 Nondepository Institutions  
 6200 Security and Commodity Brokers, Dealers, Exchanges & Services  
 6400 Insurance Agents, Brokers and Service  
 6700 Holding and Other Investment Offices  
 7000 Hotels, Rooming Houses, Camps and Other Lodging Places  
 7200 Personal Services  
 7300 Business Services  
 7340 Services to Dwellings and Other Buildings  
 7360 Personal Supply Services  
 7370 Computer Programming, Data Processing and Other Services  
 7900 Amusement and Recreation Services  
 8000 Health Services  
 8050 Nursing and Personal Care Facilities  
 8111 Legal Services  
 8200 Educational Services  
 8300 Social Services  
 8320 Individual and Family Social Services  
 8330 Job Training and Vocational Rehabilitation Services  
 8350 Child Day Care Services  
 8360 Residential Care  
 8390 Social Services, Not Elsewhere Classified  
 8600 Membership Organizations  
 8720 Accounting, Auditing and Bookkeeping Services

### North Dakota:

2010 Meat Products  
 2050 Bakery Products

## SIC Code Industry Description

### North Dakota, continued:

2090 Misc. Food Preparations and Kindred Products  
 2390 Misc. Fabricated Textile Products  
 2430 Millwork, Veneer, Plywood and Structural Wood Members  
 2510 Household Furniture  
 2750 Commercial Printing  
 3000 Rubber and Miscellaneous Plastics Products  
 3440 Fabricated Structural Metal Products  
 3520 Farm and garden Machinery and Equipment  
 3530 Construction, Mining and Materials Handling Machinery  
 3670 Electronic Components and Accessories  
 3690 Misc. Electrical Machinery, Equipment and Supplies  
 3710 Motor Vehicles and Motor Vehicle Equipment  
 3720 Aircraft and Parts  
 3840 Surgical, Medical and Dental Instruments and Supplies  
 3990 Misc. Manufacturing Industries  
 4100 Local and Suburban Transit & Interurban Highway Pass. Transp.  
 4210 Trucking and Courier Services, except Air  
 4720 Arrangement of Passenger Transportation  
 4730 Arrangement of Transportation of Freight and Cargo  
 4830 Radio and Television Broadcasting Stations  
 4910 Electric Services  
 4920 Gas Production and Distribution  
 5040 Professional and Commercial Equipment and Supplies  
 5110 Paper and Paper Products  
 5140 Groceries and Related Products  
 5190 Misc. Nondurable Goods  
 6000 Depository Institutions  
 6320 Accident and Health Insurance and Medical Service Plans  
 6400 Insurance Agents, Brokers and Service  
 6510 Real estate Operators (Except Developers) and Lessors  
 6530 Real Estate Agents and Mangers  
 7310 Advertising  
 7340 Services to Dwellings and Other Buildings  
 7360 Personal Supply Services  
 7370 Computer Programming, Data Processing and Other Services

# SCREEN 1: GROWTH INDUSTRIES AMONG STATES IN THE REGION

## SIC Code Industry Description

### North Dakota, continued:

7380	Misc. Business Services
7530	Automotive Repair Shops
7540	Automotive Services, Except Repair
7690	Misc. Repair Shops and Related Services
7990	Misc. Amusement and Recreation Services
8010	Offices and Clinics of Doctors if Medicine
8020	Office and Clinics of Dentists
8040	Offices and Clinics of Other Health Practitioners
8050	Nursing and Personal Care Facilities
8060	Hospitals
8080	Home Health Care Services
8100	Legal Services
8200	Educational Services
8320	Individual and Family Social Services
8330	Job Training and Vocational Rehabilitation Services
8350	Child Day Care Services
8360	Residential Care
8390	Social Services, Not Elsewhere Classified
8640	Civic, Social and Fraternal Organizations
8660	Religious Organizations
8710	Engineering, Architectural and Surveying Services
8720	Accounting, Auditing and Bookkeeping Services
8730	Research, development and Testing Services
8740	Management and Public Relations Services

### Oregon:

2000	Food and Kindred Products
2500	Furniture and Fixtures
2700	Printing, Publishing and Allied Industries
3000	Rubber and Misc. Plastics Products
3300	Primary Metal Industries
3600	Electronic and Other Electrical Equipment and Components
3700	Transportation Equipment

## SIC Code Industry Description

### Oregon, continued:

3900	Misc. Manufacturing Industries
4200	Motor Freight Transportation and Warehousing
4500	Transportation by Air
4700	Transportation Services
5000	Wholesale Trade, Durable Goods
5100	Wholesale Trade, Nondurable Goods
6000	Depository Institutions
6300	Insurance Carriers
7300	Business Services
7900	Amusement and Recreation Services
8000	Health Services
8300	Social Services
8600	Membership Organizations
8700	Engineering, Accounting, Research and Management Services

### Arizona:

1021	Copper Mining
2000	Food and Kindred Products
2400	Lumber and Wood Products
2700	Printing, Publishing and Allied Industries
3200	Stone, Clay, Glass and Concrete Products
3300	Primary Metal Industries
3400	Fabricated Metal Products, Excp Machine and Transport. Equip.
3500	Industrial and Commercial Machinery and Computer Equipment
3720	Aircraft and Missiles
5000	Wholesale Trade, Durable Goods
5100	Wholesale Trade, Nondurable Goods
5800	Eating & Drinking Places
7000	Hotels, Rooming Houses, Camps and Other Lodging Places
7300	Business Services
8000	Health Services

Source: Leland Consulting Group.



SCREEN 2A: HISTORICAL GROWTH ANALYSIS OF MANUFACTURING INDUSTRIES

SIC Code	Industry Description	Total Employment			Total Establishments			Average Number Employees			% of Employment Growth			% of Establishment Growth		
		1980	1987	1990	1980	1987	1990	1980	1987	1990	1980-87	1987-90	1980-90	1980-87	1987-90	1980-90
20	Food and Kindred Products	1,516,937	1,424,686	1,452,803	20,983	20,837	20,492	72	68	71	-6.08%	1.97%	-4.23%	-0.70%	-1.66%	-2.34%
201	Meat Products	321,810	337,806	371,386	3,287	3,305	3,111	98	102	102	4.97%	9.94%	15.41%	0.55%	-5.87%	-5.35%
2011	Meat Packaging Plants	143,219	126,125	119,172	1,569	1,555	1,295	91	81	81	-11.94%	-5.51%	-16.77%	-0.89%	-16.72%	-17.46%
2013	Sausages and Other Prepared Meat Products	66,531	67,818	78,799	1,153	1,240	1,173	58	55	55	1.93%	16.19%	18.44%	7.55%	-5.40%	1.73%
2015	Poultry Slaughtering and Processing			170,850			472									
2016	R	94,847	121,086		374	341		254	355		27.66%	-100.00%	-100.00%	-8.82%	-100.00%	-100.00%
2017	R	16,967	21,127		153	133		111	159		24.52%	-100.00%	-100.00%	-13.07%	-100.00%	-100.00%
202	Dairy Products	153,391	137,674	140,154	2,747	2,361	2,123	56	58	58	-10.25%	1.80%	-8.63%	-14.05%	-10.08%	-22.72%
203	Cnd., Frzn., and Pres. Fruits, Veg., and Fd Spec.	202,552	199,879	187,979	2,019	2,049	1,863	100	98	98	-1.32%	-5.95%	-7.19%	1.49%	-9.06%	-7.73%
2032	R	24,842	23,846	22,928	190	221	202	131	108	108	-4.01%	-3.85%	-7.70%	16.32%	-8.60%	6.32%
2033	Canned Fruits, Vegetables, Preserves, Jams, and Jellies	57,181	48,989	48,316	708	653	598	81	75	75	-14.33%	-1.37%	-15.50%	-7.77%	-8.42%	-15.54%
2034	R	14,493	11,938	10,527	172	149	136	84	80	80	-17.63%	-11.82%	-27.36%	-13.37%	-7.38%	-19.77%
2035	Pckd. Fruits and Veg., Veg. Sauces and Seas., Dress.	18,298	20,462	18,882	375	375	362	49	55	55	11.83%	-7.72%	3.19%	0.00%	-3.47%	-3.47%
2037	Frozen Fruits, Fruit Juices, and Vegetables	49,011	43,802	46,414	251	256	238	195	171	171	-10.63%	5.96%	-5.30%	1.99%	-7.03%	-5.18%
2038	R	38,647	50,561	40,074	312	391	277	124	129	129	30.83%	-20.74%	3.69%	25.32%	-29.16%	-11.22%
204	Grain Mill Products	119,375	101,337	103,829	2,733	2,614	2,524	44	39	39	-15.11%	2.46%	-13.02%	-4.35%	-3.44%	-7.65%
205	Bakery Products	220,092	204,993	217,004	2,385	2,768	3,093	92	74	74	-6.86%	5.86%	-1.40%	16.06%	11.74%	29.69%
2051	Bread and Other Bakery Products, Except Cookies and Crackers	173,683	158,204	154,779	2,045	2,349	2,027	85	67	67	-8.91%	-2.16%	-10.88%	14.87%	-13.71%	-0.88%
2052	Cookies and Crackers	46,048	46,691		314	375	361	147	125	125	1.40%	-0.01%	1.36%	19.43%	-3.73%	14.97%
2053	Frozen Bakery Product, Except Bread			10,646			129									
206	Sugar and Confectionery Products	96,361	87,042	91,327	974	1,054	1,126	101	83	83	-11.51%	4.92%	-7.15%	8.21%	6.83%	15.61%
207	Fats and Oils	42,895	31,107	28,998	743	605	564	58	51	51	-27.48%	-6.78%	-32.40%	-18.57%	-6.78%	-24.09%
208	Beverages	204,559	167,308	148,859	2,641	2,275	2,035	77	74	74	-18.21%	-11.03%	-27.23%	-13.86%	-10.55%	-22.95%
2082	Malt Beverages	44,000	31,734	33,952	109	133	154	404	239	239	-27.86%	6.99%	-22.84%	22.02%	15.79%	41.28%
2083	Malt	1,687	1,400	1,381	35	26	28	48	54	54	-17.01%	-1.36%	-18.14%	-25.71%	7.69%	-20.00%
2084	Wines, Brandy, and Brandy Spirits	10,965	14,594	14,557	283	515	521	39	28	28	33.10%	-0.25%	32.76%	81.96%	1.17%	84.10%
2085	Distilled and Blended Liquors	14,344	10,000	6,886	101	80	62	142	125	125	-30.28%	-31.14%	-51.99%	-20.79%	-22.50%	-38.61%
2086	Bottled and Canned Soft Drinks and Carbonated Waters	122,944	97,975	82,716	1,774	1,198	947	69	82	82	-20.31%	-15.57%	-32.72%	-32.47%	-20.95%	-46.62%
2087	Flav. Extracts and Flav. Syrups, Not Elsewhere Classified	10,508	11,561	9,962	328	310	266	32	37	37	10.02%	-22.48%	-14.71%	-5.49%	-14.19%	-18.90%
209	Misc. Food Preparations and Kindred Products	153,068	157,405	161,257	3,334	3,742	3,764	46	42	42	2.83%	2.45%	5.35%	12.24%	0.59%	12.90%
2091	R Canned and Cured Fish and Seafoods	14,100	6,680	6,528	191	186	172	74	36	36	-52.62%	-2.28%	-53.70%	-2.62%	-7.53%	-9.95%
2092	Prepared Fresh or Frozen Fish and Seafood	33,508	35,181	37,819	643	644	617	52	55	55	4.99%	7.50%	12.87%	0.16%	-4.19%	-4.04%
2095	Roasted Coffee	12,081	11,519	10,951	143	147	147	84	78	78	-4.65%	-4.93%	-9.35%	2.80%	0.00%	2.80%
2096	Potato Chips, Corn Chips, and Similar Snacks			31,652			332									
2097	Manufactured Ice	4,613	4,990	4,408	552	551	489	8	9	9	8.17%	-11.66%	-4.44%	-0.18%	-11.25%	-11.41%
2098	Macaroni, Spaghetti, Vermicelli, and Noodles	9,549	8,470	6,834	203	262	199	47	32	32	-11.30%	-19.32%	-28.43%	29.06%	-24.05%	-1.97%
2099	R Food Preparations, Not Elsewhere Classified	79,109	90,143	58,933	1,576	1,896	1,410	50	48	48	13.95%	-34.62%	-25.50%	20.30%	-25.63%	-10.53%
22	Textile Mill Products	850,744	691,046	655,010	6,302	6,632	6,213	135	104	104	-18.77%	-5.21%	-23.01%	5.24%	-6.32%	-1.41%
221	Broadwoven Fabric Mills, Cotton	116,756	59,246	67,399	302	291	302	387	204	204	-49.26%	13.76%	-42.27%	-3.64%	3.78%	0.00%
222	Broadwoven Fabric Mills, Manmade Fiber and Silk	142,770	112,567	82,563	475	486	418	301	232	232	-21.16%	-26.65%	-42.17%	2.32%	-13.99%	-12.00%
223	Broadwoven Fabric Mills, Wool (Including Dye. and Finish.)	15,502	12,306	12,574	138	119	118	112	103	103	-20.62%	2.18%	-18.89%	-13.77%	-0.84%	-14.49%
224	Nar. Fabric, Other Smallwares Mills: Ctn, Wl, Silk, and Man. Fiber	20,487	18,152	19,112	301	271	265	68	67	67	-11.40%	5.29%	-6.71%	-9.97%	-2.21%	-11.96%
225	Knitting Mills	231,792	212,005	198,465	2,247	2,128	2,028	103	100	100	-8.54%	-6.39%	-14.38%	-5.30%	-4.70%	-9.75%
2251	Women's Full-Length and Knee-Length Hosiery, Except Socks	32,781	33,537	26,794	172	169	144	191	198	198	2.31%	-20.11%	-18.26%	-1.74%	-14.79%	-16.28%
2252	Hosiery, Not Elsewhere Classified	32,791	34,120	38,453	368	395	414	89	86	86	4.05%	12.70%	17.27%	7.34%	4.81%	12.50%
2253	Knit Outerwear Mills	65,348	67,012	56,153	876	908	693	75	74	74	2.55%	-16.20%	-14.07%	3.65%	-23.68%	-20.89%
2254	Knit Underwear and Nightwear Mills	24,886	22,034	18,397	84	76	61	296	290	290	-11.46%	-16.51%	-26.07%	-9.52%	-19.74%	-27.38%
2257	Wet Knit Fabric Mills	48,278	33,352	34,612	406	316	309	119	106	106	-30.92%	3.78%	-28.31%	-22.17%	-2.22%	-23.89%
2258	R Lace and Warp Knit Fabric Mills	22,735	18,638	19,007	198	162	220	115	115	115	-18.02%	1.98%	-16.40%	-18.18%	35.80%	11.11%
2259	Knitting Mills, Not Elsewhere Classified	4,417	3,203	3,805	87	83	73	51	39	39	-27.48%	18.79%	-13.86%	-4.60%	-12.05%	-16.09%
226	Dye. and Finish. Textiles, Excpt. Wl, Fbr and K. Goods	68,023	53,732	56,515	647	987	716	105	54	54	-21.01%	5.18%	-16.92%	52.55%	-27.46%	10.66%
2261	Finishers of Broadwoven Fabrics of Cotton	20,928	11,489	16,988	218	507	268	96	23	23	-45.10%	47.86%	-18.83%	132.57%	-47.14%	22.94%
2262	Finishers of Broadwoven Fabrics of Manmade Fiber and Silks	34,676	30,169	26,922	253	290	262	137	104	104	-13.00%	-10.76%	-22.36%	14.62%	-9.66%	3.56%
2269	Finishers of Textiles, Not Elsewhere Classified	12,395	12,074	12,013	169	189	172	73	64	64	-2.59%	-0.51%	-3.08%	11.83%	-8.99%	1.78%
227	Carpets and Rugs	53,666	55,669	51,764	509	501	428	105	111	111	3.73%	-7.01%	-3.54%	-1.57%	-14.57%	-15.91%
228	Yarn and Thread Mills	133,371	106,170	108,984	701	600	621	190	177	177	-20.39%	2.65%	-18.29%	-14.41%	3.50%	-11.41%
2281	R Yarn Spinning Mills-Con.	88,889	74,011	85,052	406	335	416	219	221	221	-16.74%	14.92%	-4.32%	-17.49%	24.18%	2.46%
2282	R Yarn Texturing, Throwing, Twisting, and Winding Mills	28,373	19,702	17,782	166	136	138	171	145	145	-30.56%	-9.75%	-37.33%	-18.07%	1.47%	-16.87%
2283	R	4,315	4,400		59	61		73	72		1.97%	-100.00%	-100.00%	3.39%	-100.00%	-100.00%
2284	R Thread Mills	11,774	8,057	6,082	67	67	59	176	120		-31.57%	-24.51%	-48.34%	0.00%	-11.94%	-11.94%
229	Misc. Textile Goods	67,887	61,026	53,757	920	1,194	940	74	51	51	-10.11%	-11.91%	-20.81%	29.78%	-21.27%	2.17%
2291	R	3,838	3,507		50	40		77	88		-8.62%	-100.00%	-100.00%	-20.00%	-100.00%	-100.00%
2292	R	2,418	1,591		65	55		37	29		-34.20%	-100.00%	-100.00%	15.38%	-100.00%	-100.00%
2293	R	5,001	5,948		93	95		54	63		18.94%	-100.00%	-100.00%	2.15%	-100.00%	-100.00%
2294	R	4,009	3,100		90	82		45	38		-22.67%	-100.00%	-100.00%	-8.89%	-100.00%	-100.00%
2295	Coated Fabrics, Not Rubberized	14,499	10,725	9,438	172	197	176	84	54	54	-26.03%	-12.00%	-34.91%	14.53%	-10.66%	2.33%
2296	Tire Cord and Fabrics	9,037	5,601	5,062	21	19	14	430	295	295	-38.02%	-9.62%	-43.99%	-9.52%	-26.32%	-33.33%
2297	Nonwoven Fabrics	12,982	12,269	14,887	89	115	121	146	107	107	-5.49%	21.34%	14.67%	29.21%	5.22%	35.96%
2298	Cordage and Twine	9,359	7,280	7,156	166	194	187	56	38	38	-22.21%	-1.70%	-23.54%	16.87%	-3.61%	12.65%
2299	R Textile Goods, Not Elsewhere Classified	6,744	10,919	17,152	174	379	434	39	29	29	61.91%	57.08%	154.33%	117.82%	14.51%	169.43%

SCREEN 2A: HISTORICAL GROWTH ANALYSIS OF MANUFACTURING INDUSTRIES

SIC Code	Industry Description	Total Employment			Total Establishments			Average Number Employees			% of Employment Growth			% of Establishment Growth		
		1980	1987	1990	1980	1987	1990	1980	1987	1990	1980-87	1987-90	1980-90	1980-87	1987-90	1980-90
23	Apparel and Other Fin. Prd. Made From Fabrics and Sim. Mat.	1,285,653	1,073,364	1,027,456	22,067	22,767	23,862	58	47	47	-16.51%	-4.28%	-20.08%	3.17%	4.81%	8.13%
231	Men's and Boys' Suits, Coats, and Overcoats	87,726	54,967	48,435	582	328	298	151	168	168	-37.34%	-11.88%	-44.79%	-43.64%	-9.15%	-48.80%
232	Men's and Boys' Furnish, Work Clthg, and All. Garments	349,083	275,122	255,318	2,640	2,106	2,044	132	131	131	-21.19%	-7.20%	-26.88%	-20.23%	-2.94%	-22.58%
233	Women's, Misses', and Juniors' Outerwear	422,286	353,695	297,734	8,479	9,679	8,272	50	37	37	-16.24%	-15.82%	-29.49%	14.15%	-14.54%	-2.44%
2331	Women's, Misses', and Juniors' Blouses and Shirts	84,927	59,828	55,898	1,441	1,146	1,057	59	52	52	-29.55%	-6.57%	-34.18%	-20.47%	-7.77%	-26.65%
2335	Women's, Misses', and Juniors' Dresses	158,329	146,550	88,839	4,038	5,398	3,122	39	27	27	-7.44%	-39.38%	-43.89%	33.68%	-42.16%	-22.68%
2337	Women's, Misses', and Juniors' Suits, Skirts, and Coats	72,863	44,391	42,458	1,360	909	788	54	49	49	-39.08%	-4.35%	-41.73%	-33.16%	-13.31%	-42.06%
2339	Women's, Misses', and Juniors' Out., Not Elsewhere Classified	105,290	102,353	101,218	1,585	2,126	2,632	66	48	48	-2.79%	-1.11%	-3.87%	34.13%	23.80%	66.06%
234	Women's, Misses', Children's, and Infants' Undergarments	90,426	72,336	60,606	800	569	484	113	127	127	-20.01%	-16.22%	-32.98%	-28.88%	-14.94%	-39.50%
235	Hats, Caps, and Millinery	17,846	17,467	17,560	345	498	355	52	35	35	-2.12%	0.53%	-1.60%	44.35%	-28.71%	2.90%
236	Girls', Children's, and Infants' Outerwear	64,673	62,377	61,070	801	740	672	81	84	84	-3.55%	-2.10%	-5.57%	-7.62%	-9.19%	-16.10%
237	Fur Goods	3,710	2,073	1,391	505	384	287	7	5	5	-44.12%	-32.90%	-62.51%	-23.96%	-25.26%	-43.17%
238	Misc. Apparel and Accessories	55,180	39,670	43,130	1,076	979	991	51	41	41	-28.11%	8.72%	-21.84%	-9.01%	1.23%	-7.90%
239	Misc. Fabricated Textile Products	190,460	193,198	205,860	5,857	6,769	7,259	33	29	29	1.44%	6.55%	8.09%	15.57%	7.24%	23.94%
2391	Curtains and Draperies	31,284	26,884	24,487	1,371	1,266	1,115	23	21	21	-14.06%	-8.92%	-21.73%	-7.66%	-11.93%	-18.67%
2392	House furnishings, Except Curtains and Draperies	46,833	47,671	49,361	844	911	830	55	52	52	1.79%	3.95%	5.40%	7.94%	-8.89%	-1.66%
2393	Textile Rugs	9,813	7,752	10,402	222	249	265	44	31	31	-21.00%	34.18%	6.00%	12.16%	6.43%	19.37%
2394	Canvas and Related Products	16,666	17,803	16,787	996	1,298	1,220	17	14	14	6.82%	-5.71%	0.73%	30.32%	-6.01%	22.49%
2395	Pleat., Dec. and Nvty. Stitch., and Tucking	19,728	21,226	14,680	696	814	645	28	26	26	7.59%	-30.84%	-25.59%	16.95%	-20.76%	-7.33%
2396	Auto. Trim, Apparel Findings, and Rtd. Products	29,993	32,057	47,656	719	1,007	1,593	42	32	32	6.88%	48.66%	58.89%	40.06%	58.19%	121.56%
2397	Schiffli Machine Embroideries	6,826	5,200	5,575	318	263	215	21	20	20	-23.82%	7.21%	-18.33%	-17.30%	-18.25%	-32.39%
2399	Fabricated Textile Products	27,912	34,141	31,797	589	897	834	47	38	38	22.32%	-6.87%	13.92%	52.29%	-7.02%	41.60%
24	Lumber and Wood Products, Except Furniture	709,450	697,602	706,949	29,718	33,998	34,788	24	21	21	-1.67%	1.34%	-0.35%	14.40%	2.32%	17.06%
241	Logging	96,372	88,957	89,331	10,823	12,069	12,412	9	7	7	-9.57%	0.42%	-9.19%	11.51%	2.84%	14.68%
242	Sawmills and Planing Mills	207,169	179,758	180,322	7,285	6,583	6,311	28	27	27	-13.23%	0.31%	-12.96%	-9.64%	-4.13%	-13.37%
243	Millwork, Veneer, Plywood, and Structural Wood Members	200,949	233,749	238,030	5,699	7,846	7,940	35	30	30	16.32%	1.83%	18.45%	37.67%	1.20%	39.32%
2431	R Millwork	69,084	86,087	92,732	2,042	2,770	2,723	34	31	31	24.61%	7.72%	34.23%	35.65%	-1.70%	33.35%
2434	Wood Kitchen Cabinets	51,454	65,317	63,583	2,407	3,576	3,547	21	18	18	26.94%	-2.65%	23.57%	48.57%	-0.81%	47.36%
2435	Hardwood Veneer and Plywood	24,244	19,765	20,953	298	305	297	81	65	65	-18.47%	6.01%	-13.57%	2.35%	-6.22%	-0.34%
2436	Softwood Veneer and Plywood	40,782	36,707	34,633	231	221	206	177	166	166	-9.99%	-5.65%	-15.08%	-4.33%	-6.79%	-10.82%
2439	Structural Wood Members, Not Elsewhere Classified	14,897	25,773	23,187	669	944	801	22	27	27	73.01%	-10.03%	55.65%	41.11%	-15.15%	19.73%
244	Wood Containers	45,725	38,839	40,558	1,945	2,233	2,202	24	17	17	-15.06%	4.43%	-11.30%	14.81%	-1.39%	13.21%
245	Wood Buildings and Mobile Homes	69,505	62,409	58,130	1,060	1,052	966	66	59	59	-10.21%	-6.86%	-16.37%	-0.75%	-8.17%	-8.87%
2451	Mobile Homes	47,550	39,939	36,754	505	389	327	94	103	103	-16.01%	-7.97%	-22.70%	-22.97%	-15.94%	-35.25%
2452	Prefabricated Wood Buildings and Components	21,950	22,470	21,315	554	663	637	40	34	34	2.37%	-5.14%	-2.89%	19.68%	-3.92%	14.98%
249	Misc. Wood Products	87,116	92,721	92,488	2,728	3,763	3,493	32	25	25	6.43%	-0.25%	6.17%	37.94%	-7.18%	28.04%
2491	Wood Preserving	13,301	12,631	12,872	457	544	494	29	23	23	-5.04%	1.91%	-3.23%	19.04%	-9.19%	8.10%
2492	R	6,623	8,146		80	93		83	88		23.00%	-100.00%	-100.00%	16.25%	-100.00%	-100.00%
2493	Reconstituted Wood Products			21,538			261									
2499	R Wood Products, Not Elsewhere Classified	67,192	71,704	58,014	2,191	3,052	2,732	31	23	23	6.72%	-19.09%	-13.66%	39.30%	-10.48%	24.69%
25	Furniture and Fixtures	491,280	505,284	510,423	8,885	11,659	12,141	55	43	43	2.85%	1.02%	3.90%	31.22%	4.13%	36.65%
251	Household Furniture	316,786	285,263	273,531	4,879	5,649	5,063	65	50	50	-9.95%	-4.11%	-13.65%	15.78%	-10.37%	3.77%
2511	Wood Household Furniture, Except Upholstered	145,979	132,326	129,592	2,109	2,949	2,627	69	45	45	-9.35%	-2.07%	-11.23%	39.83%	-10.92%	24.56%
2512	Wood Household Furniture, Upholstered	89,224	81,861	79,532	1,220	1,153	1,047	73	71	71	-8.25%	-2.85%	-10.86%	-5.49%	-9.19%	-14.18%
2514	Metal Household Furniture	33,753	29,115	27,678	412	403	344	82	72	72	-13.74%	-4.94%	-18.00%	-2.18%	-14.64%	-16.50%
2515	Mattresses, Foundations, and Convertible Beds	28,811	26,285	24,396	856	854	787	34	31	31	-8.77%	-7.19%	-15.32%	-0.23%	-7.85%	-8.06%
2517	Wd. Tele., Radio, Phono., and Sewing Mach. Cab.	8,914	6,663	4,516	80	79	78	111	84	84	-25.25%	-32.22%	-49.34%	-1.25%	-1.27%	-2.50%
2519	Household Furniture, Not Elsewhere Classified	9,967	9,013	7,561	178	209	156	56	43	43	-9.75%	-16.11%	-24.29%	17.42%	-25.36%	-12.36%
252	Office Furniture	54,108	71,795	76,847	549	919	932	99	78	78	32.69%	7.04%	42.03%	67.40%	1.41%	69.76%
253	Public Building and Related Furniture	19,772	22,508	24,316	373	488	456	53	46	46	13.84%	8.03%	22.98%	30.83%	-6.56%	22.25%
254	Partitions, Shelving, Lockers, and Office and Store Fixtures	65,950	70,378	75,073	1,903	2,303	2,254	35	31	31	6.71%	6.67%	13.83%	21.02%	-2.13%	18.44%
2541	Wd. Off. and Store Fix., Part., Shlvg., and Lockers	34,607	38,312	40,979	1,423	1,729	1,673	24	22	22	10.71%	6.96%	18.41%	21.50%	-3.24%	17.57%
2542	R Off. and Store Fix., Part., Shlvg., and Lockers, Except Wd.	31,313	32,066	34,029	476	572	572	66	56	56	2.40%	6.12%	8.67%	20.17%	0.00%	20.17%
259	Misc. Furniture and Fixtures	33,633	53,557	45,985	801	1,874	1,442	42	29	29	59.24%	-14.14%	36.73%	133.96%	-23.05%	80.02%
26	Paper and Allied Products	656,216	626,865	631,448	6,193	6,433	6,389	106	97	97	-4.47%	0.73%	-3.77%	3.88%	-0.68%	3.16%
261	Pulp Mills	17,760	17,030	14,575	75	59	45	237	289	289	-4.11%	-14.42%	-17.93%	-21.33%	-23.73%	-40.00%
262	Paper Mills	131,724	128,858	131,221	375	360	328	351	358	358	-2.18%	1.83%	-0.38%	-4.00%	-8.89%	-12.53%
263	Paperboard Mills	65,491	51,355	53,288	261	241	225	251	213	213	-21.58%	3.76%	-18.63%	-7.66%	-6.64%	-13.79%
264		226,930	231,838		2,663	2,956		85	78		2.16%	-100.00%	-100.00%	11.00%	-100.00%	-100.00%
2641	R	45,683	46,373		485	514		94	90		1.51%	-100.00%	-100.00%	5.96%	-100.00%	-100.00%
2642	R	25,030	26,971		259	297		97	91		7.75%	-100.00%	-100.00%	14.67%	-100.00%	-100.00%
2643	R	51,704	50,866		545	561		95	91		-1.62%	-100.00%	-100.00%	2.94%	-100.00%	-100.00%
2645	R	18,385	2,973		371	441		50	7		-83.83%	-100.00%	-100.00%	18.87%	-100.00%	-100.00%
2646	R	4,497	2,586		35	36		128	83		-33.60%	-100.00%	-100.00%	2.86%	-100.00%	-100.00%
2647	R	37,753	39,284		131	140		288	281		4.06%	-100.00%	-100.00%	6.87%	-100.00%	-100.00%
2648	R	13,994	13,429		223	196		63	69		-4.04%	-100.00%	-100.00%	-12.11%	-100.00%	-100.00%
2649	R	29,834	30,776		609	770		49	40		-3.16%	-100.00%	-100.00%	26.44%	-100.00%	-100.00%
265	Paperboard Containers and Boxes	205,215	193,081	197,101	2,639	2,729	2,711	78	71	71	-5.91%	2.08%	-3.95%	3.41%	-0.66%	-2.73%
2651	R	41,995	43,321		484	557		87	78		3.16%	-100.00%	-100.00%	15.08%	-100.00%	-100.00%
2652	Setup Paperboard Boxes	12,509	9,120	7,754	285	215	177	44	42	42	-27.09%	-14.98%	-38.01%	-24.56%	-17.67%	-37.89%

SCREEN 2A: HISTORICAL GROWTH ANALYSIS OF MANUFACTURING INDUSTRIES

SIC Code	Industry Description	Total Employment			Total Establishments			Average Number Employees			% of Employment Growth			% of Establishment Growth		
		1980	1987	1990	1980	1987	1990	1980	1987	1990	1980-87	1987-90	1980-90	1980-87	1987-90	1980-90
2653	Corrugated and Solid Fiber Boxes	103,614	102,810	109,874	1,407	1,531	1,584	74	67	67	-0.78%	6.87%	6.04%	8.81%	3.46%	12.58%
2654	R Fiber Cans, Tubes, Drums, and Similar Products	30,118	25,237	443,133	166	138		181	183		-16.21%	-100.00%	-100.00%	-16.87%	-100.00%	-100.00%
2655	Sanitary Food Containers, Except Folding	16,910	12,567	13,178	290	284	287	58	44	44	-25.68%	4.86%	-22.07%	-2.07%	1.06%	-1.03%
2656	Folding Paperboard Boxes, Including Sanitary			50,399			568									
2657																
266		9,017	4,566		149	52		61	88		-49.36%	-100.00%	-100.00%	-65.10%	-100.00%	-100.00%
267	Conv. Paper & Paperboard Prod., Excpt. Contain. and Boxes			232,323			2,774									
27	Printing, Publishing, and Allied Industries	1,260,191	1,500,624	1,551,685	44,797	61,918	63,133	28	24	24	19.08%	3.40%	23.13%	38.22%	1.96%	40.93%
271	Newspapers: Publishing, or Publishing and Printing	405,702	451,587	443,133	8,277	9,404	8,576	49	48	48	11.31%	-1.87%	9.23%	13.62%	-8.80%	3.61%
272	Periodicals: Publishing, or Publishing and Printing	84,072	110,062	116,125	2,773	3,882	4,255	30	28	28	30.91%	5.51%	38.13%	39.99%	9.61%	53.44%
273	Books	114,771	117,169	121,483	2,353	2,927	2,648	40	40	40	2.09%	3.68%	5.85%	24.39%	-9.53%	12.54%
274	Misc. Publishing	45,009	65,186	70,113	1,567	2,285	2,250	29	29	29	44.83%	7.56%	55.78%	45.82%	-1.53%	43.59%
275	Commercial Printing	415,538	557,821	566,369	22,306	35,865	32,352	19	16	16	34.24%	1.53%	36.30%	60.79%	-9.80%	45.04%
2751	R Commercial Printing, Lithographic	118,248	122,252		8,247	9,592		14	13		3.39%	-100.00%	-100.00%	16.31%	-100.00%	-100.00%
2752		260,904	393,680	410,056	12,456	24,609	22,535	21	16	16	50.89%	4.16%	57.17%	97.57%	-8.43%	80.92%
2753	R Commercial Printing, Gravure	12,566	14,246		566	777		22	18		13.37%	-100.00%	-100.00%	37.28%	-100.00%	-100.00%
2754	R Commercial Printing, Not Elsewhere Classified	22,223	27,135	24,181	515	511	351	43	53	53	22.10%	-10.89%	8.81%	-0.78%	-31.31%	-31.84%
2759	Manifold Business Forms	49,552	50,438	50,675	705	798	847	70	63	63	1.79%	0.47%	2.27%	13.19%	6.14%	20.14%
276	Greeting Cards	22,331	20,997	20,697	131	159	150	170	126	126	-10.00%	2.99%	-7.32%	21.37%	-5.66%	14.50%
277	Blankbk, Loose, Binders, Bookbind, and Rtd. Work	65,164	66,645	68,271	1,369	1,495	1,523	48	45	45	2.27%	2.44%	4.77%	9.20%	1.87%	11.25%
278	Service Industries for the Printing Trade	54,951	60,860	67,575	3,475	4,331	4,205	16	14	14	10.75%	11.03%	22.97%	24.63%	-2.91%	21.01%
28	Chemicals and Allied Products	924,277	812,789	864,307	11,261	12,194	12,301	82	67	67	-12.06%	6.34%	-6.49%	8.29%	0.88%	9.24%
281	Industrial Inorganic Chemicals	115,588	90,461	101,288	1,280	1,377	1,420	90	66	66	-21.57%	11.72%	-12.37%	7.58%	3.12%	10.94%
282	Pla. Mts., Syn. Resins, Syn. Rubber, Cell. and Other Man. Fibers, Excpt Glass	154,455	121,473	130,180	645	761	685	239	160	160	-21.35%	7.17%	-15.72%	17.96%	-9.99%	6.20%
283	Drugs	168,506	174,747	187,747	1,102	1,355	1,343	153	129	129	3.70%	7.44%	11.42%	22.96%	-0.89%	21.87%
2831	R Medicinal Chemicals and Botanical Products	17,622	24,139		287	358		61	67		36.98%	-100.00%	-100.00%	24.74%	-100.00%	-100.00%
2833	Pharmaceutical Preparations	16,347	17,048	12,671	174	244	226	94	70	70	4.29%	-25.67%	-22.49%	40.23%	-7.38%	29.89%
2834	In Vitro and In Vivo Diagnostic Substances	134,378	133,539	143,955	631	743	680	213	180	180	-0.62%	7.80%	7.13%	17.75%	-8.48%	7.77%
2835	Biological Products, Except Diagnostic Substances			16,421			161									
2836	Soap, Det., and Cing. Preps; Perf., Cos., and Other Tlt. Prep.	124,156	122,679	126,118	2,277	2,419	2,345	55	51	51	-1.19%	2.80%	1.58%	6.24%	-3.06%	2.99%
284	Paints, Varnishes, Lacquers, Enamels, and Allied Products	62,894	54,688	54,678	1,433	1,419	1,418	44	39	39	-13.05%	-0.02%	-13.06%	-0.98%	-0.07%	-1.05%
285	Industrial, Organic Chemicals	157,458	118,475	129,286	859	900	909	183	132	132	-24.76%	9.13%	-17.89%	4.77%	1.00%	5.82%
286	Agricultural Chemicals	57,369	41,213	42,507	1,160	942	873	49	44	44	-28.16%	3.14%	-25.91%	-18.79%	-7.32%	-24.74%
287	Misc. Chemical Products	83,515	88,701	87,962	2,369	2,941	2,685	35	30	30	6.21%	-0.83%	5.32%	24.15%	-8.70%	13.34%
289	Petroleum Refining and Related Industries	146,531	122,285	113,467	2,142	2,300	2,264	68	53	53	-16.55%	-7.21%	-22.56%	7.38%	-1.57%	5.70%
29	Petroleum Refining	99,814	83,011	73,527	418	457	335	239	182	182	-16.83%	-11.42%	-26.34%	9.33%	-26.70%	-19.86%
291	Asphalt Paving Mixtures and Blocks	33,301	26,831	25,755	1,237	1,336	1,315	27	20	20	-19.43%	-4.01%	-22.66%	8.00%	-1.57%	6.31%
295	Misc. Products of Petroleum and Coal	13,346	12,441	13,624	472	505	490	28	25	25	-7.13%	9.51%	1.70%	6.99%	-2.97%	3.81%
299	Rubber and Miscellaneous Plastics Products	769,471	785,562	882,821	11,807	13,813	15,302	65	57	57	2.09%	12.38%	14.73%	16.99%	10.78%	29.60%
30	Tires and Inner Tubes	95,651	64,053	68,505	157	159	145	609	403	403	-33.03%	6.95%	-28.38%	1.27%	-8.81%	-7.64%
301	Rubber and Plastics Footwear	18,217	9,614	10,704	68	61	61	268	158	158	-47.23%	11.34%	-41.24%	-10.29%	0.00%	-10.29%
302		866	859		20	37		43	23		-0.81%	-100.00%	-100.00%	85.00%	-100.00%	-100.00%
303		36,678	21,909		154	179		238	122		-40.27%	-100.00%	-100.00%	16.23%	-100.00%	-100.00%
304	Gaskets Pack., and Seal, Dev. and Rub. and Plast. Hose and Belt.			55,085			679									
305	Fabricated Rubber Products, Not Elsewhere Classified	102,361	100,605	105,809	1,254	1,506	1,619	82	67	67	-1.72%	5.17%	3.37%	20.10%	7.50%	29.11%
306		515,562	568,481		10,132	11,848		51	50		14.14%	-100.00%	-100.00%	16.94%	-100.00%	-100.00%
307				636,896			12,341									
308	Misc. Plastics Products	633,138	543,510	522,856	15,645	16,716	16,155	40	33	33	-14.16%	-3.80%	-17.42%	6.85%	-3.36%	3.26%
32	Stone, Clay, Glass, and Concrete Products	21,401	15,528	15,117	106	119	124	202	130	130	-27.44%	-2.65%	-29.36%	12.26%	4.20%	16.98%
321	Flat Glass	111,630	73,662	74,350	442	485	505	253	152	152	-34.01%	0.93%	-33.40%	9.73%	4.12%	14.25%
322	Glass and Glassware, Pressed or Blows	43,999	49,517	55,347	1,074	1,446	1,497	41	34	34	12.54%	11.77%	25.79%	34.64%	3.53%	39.39%
323	Glass Products, Made of Purchased Glass	30,752	18,633	19,085	205	197	225	150	95	95	-39.41%	2.43%	-37.94%	-3.90%	14.21%	9.76%
324	Cement, Hydraulic	43,258	35,309	34,716	635	600	592	68	59	59	-18.38%	-1.68%	-19.75%	-5.51%	-1.33%	-6.77%
325	Structural Clay Products	46,919	34,124	38,799	773	998	1,001	61	34	34	-27.27%	13.70%	-17.31%	29.11%	0.30%	29.50%
326	Pottery and Related Products	189,015	196,669	193,400	9,445	9,765	9,467	20	20	20	4.05%	-1.66%	2.32%	3.39%	-3.05%	0.23%
327	Concrete, Gypsum, and Plaster Products	17,967	19,139	17,787	1,023	1,085	977	18	18	18	6.52%	-7.06%	-1.00%	6.06%	-9.95%	-4.50%
3271	Concrete Block and Brick	65,606	69,247	67,626	3,111	3,130	2,991	21	22	22	5.70%	-2.48%	-1.44%	0.61%	-4.44%	-3.86%
3272	Concrete Products, Except Block and Brick	88,392	91,536	89,386	5,056	5,310	5,007	17	17	17	3.56%	-2.35%	1.12%	5.02%	-5.71%	-0.97%
3273	Ready-Mixed Concrete	6,392	5,183	5,064	85	80	76	75	65	65	-18.91%	-2.30%	-20.78%	-5.88%	-5.00%	-10.59%
3274	Lime	10,250	11,404	11,784	119	141	165	86	81	81	11.26%	3.33%	14.97%	18.49%	17.02%	38.66%
3275	Gypsum Products	12,964	12,747	13,263	778	781	773	17	16	16	-1.67%	4.05%	2.31%	0.39%	-1.02%	-0.64%
328	Cut Stone and Stone Products	133,097	107,225	76,802	2,118	2,273	1,601	63	47	47	-19.44%	-28.37%	-42.30%	7.32%	-29.56%	-24.41%
329	Abrasive, Asbestos, and Miscellaneous Nonmetallic Mineral Products	1,171,216	685,115	722,603	6,990	6,874	6,862	168	100	100	-41.50%	5.47%	-38.30%	-1.66%	-0.17%	-1.83%
33	Primary Metal Industries	526,964	243,886	261,421	1,262	1,303	1,299	418	187	187	-53.72%	7.19%	-50.39%	3.25%	-0.31%	2.93%
331	Steel Works, Blast Furnaces, and Rolling and Finishings Mills	233,463	127,272	135,853	1,353	1,240	1,258	173	103	103	-45.49%	6.74%	-41.81%	-8.35%	1.45%	-7.02%
332	Iron and Steel Foundries	61,072	31,331	36,427	187	187	174	327	168	168	-48.70%	16.27%	-40.35%	0.00%	-6.95%	-6.95%
333	Primary Smelting and Refining of Nonferrous Metals	23,605	15,951	15,503	420	423	387	56	38	38	-32.43%	-2.81%	-34.32%	0.71%	-8.51%	-7.86%
334	Secondary Smelting and Refining of nonferrous Metals	197,885	156,285	158,147	979	1,029	1,041	202	152	152	-21.02%	1.19%	-20.08%	5.11%	1.17%	6.33%
335	Rolling, Drawing, and Extruding of Nonferrous Metals															

SCREEN 2A: HISTORICAL GROWTH ANALYSIS OF MANUFACTURING INDUSTRIES

SIC Code	Industry Description	Total Employment			Total Establishments			Average Number Employees			% of Employment Growth			% of Establishment Growth		
		1980	1987	1990	1980	1987	1990	1980	1987	1990	1980-87	1987-90	1980-90	1980-87	1987-90	1980-90
336	Nonferrous Foundries (Castings)	90,643	81,580	81,276	1,800	1,690	1,680	50	48	48	-10.00%	-0.37%	-10.33%	-6.11%	-0.59%	-6.67%
3361	R	58,571	54,653		973	961		60	56		-6.69%	-100.00%	-100.00%	0.82%	-100.00%	-100.00%
3362	R	15,358	10,128		473	355		32	29		-34.05%	-100.00%	-100.00%	-24.95%	-100.00%	-100.00%
3363	Aluminum Die-Castings			29,305			356									
3364	Nonferrous Die-Castings, Except Aluminum			13,684			276									
3365	Aluminum Foundries			24,519			557									
3366	Copper Foundries			7,942			300									
3369	R Nonferrous Foundries, Except Aluminum and Copper	16,448	16,759	4,932	337	342	70	49	49	49	1.89%	-70.57%	-70.01%	1.48%	-79.53%	-79.23%
339	Misc. Primary Metal Products	37,433	28,793	33,335	923	976	919	41	30	30	-23.08%	15.77%	-10.95%	5.74%	-5.84%	-0.43%
34	Fab. Met. Prod., Except Mach. and Trans. Equip.	1,675,898	1,447,391	1,483,334	31,243	35,842	37,683	54	40	40	-13.63%	2.46%	-11.49%	14.72%	5.14%	20.61%
341	Metal Cans and Shipping Containers	70,034	49,939	44,886	557	552	518	126	90	90	-28.69%	-10.12%	-35.91%	-0.90%	-6.16%	-7.00%
342	Cutlery, Handtools, and General Hardware	178,459	137,683	143,043	1,925	2,199	2,415	93	63	63	-22.85%	3.89%	-19.85%	14.23%	9.82%	25.45%
343	Heating Equip., Excpt. Elec. and Warm Air; and Plumb. Fixt.	63,266	46,834	46,133	1,082	870	787	58	54	54	-25.97%	-1.50%	-27.08%	-19.59%	-9.54%	-27.26%
3431	Enameled Iron and Metal Sanitary Ware	9,222	9,171	8,778	89	107	95	104	86	86	-0.55%	-4.29%	-4.81%	20.22%	-11.21%	6.74%
3432	R Plumbing Fixture Fittings and Trim	19,565	15,883	17,641	193	178	174	101	89	89	-18.82%	11.07%	-9.83%	-7.77%	-2.25%	-9.84%
3433	R Heating Equipment, Except Electric and Warm Air Furnaces	34,321	21,764	19,160	776	571	443	44	38	38	-36.59%	-11.96%	-44.17%	-26.42%	-22.42%	-42.91%
344	Fabricated Structural Metal Products	465,904	388,945	415,377	11,018	12,217	12,475	42	32	32	-16.52%	6.80%	-10.84%	10.88%	2.11%	13.22%
3441	Fabricated Structural Metal	111,214	83,548	82,711	2,346	2,468	2,440	47	34	34	-24.88%	-1.00%	-25.63%	5.20%	-1.13%	4.01%
3442	R Metal Doors, Frames, Molding, and Trim	69,593	73,935	68,580	1,586	1,591	1,435	44	46	46	6.24%	-7.24%	-1.46%	0.32%	-9.81%	-9.52%
3443	Fabricated Plate Work (Boiler Shops)	136,294	69,748	81,544	1,733	1,630	1,595	79	43	43	-48.83%	16.91%	-40.17%	-5.94%	-2.15%	-7.96%
3444	R Sheet Metal Work	89,802	92,933	102,226	3,149	4,137	4,061	29	22	22	3.49%	10.00%	13.83%	31.38%	-1.84%	28.56%
3446	Architectural and Ornamental Metal Work	25,147	23,605	27,227	1,335	1,266	1,282	19	19	19	-6.13%	15.34%	8.27%	-5.17%	1.26%	-3.97%
3448	Prefabricated Metal Buildings and Components	24,940	24,235	26,207	432	551	511	58	44	44	-2.83%	8.14%	5.08%	27.55%	-7.26%	18.29%
3449	R Misc. Structural Metal Work	17,869	20,707	22,091	316	512	560	57	40	40	15.88%	6.68%	23.63%	62.03%	9.38%	77.22%
345	Screw Machine Prod., and Bolts, Nuts, Screws, Rivets, and Washers	117,734	92,500	95,623	2,505	2,493	2,425	47	37	37	-21.43%	3.38%	-18.78%	-0.48%	-2.73%	-3.19%
3451	Screw Machine Products	51,146	43,331	42,891	1,732	1,643	1,514	30	26	26	-15.28%	-1.02%	-16.14%	-5.14%	-7.85%	-12.59%
3452	Bolts, Nuts, Screws, Rivets, and Washers	66,584	49,169	52,732	772	850	910	86	58	58	-26.15%	7.23%	-20.81%	10.10%	7.06%	17.88%
346	Metal Forgings and Stampings	283,064	254,823	251,240	3,584	3,977	4,101	79	64	64	-9.98%	-1.41%	-11.24%	10.97%	3.12%	14.43%
347	Coating, Engraving, and Allied Services	105,167	114,684	116,322	4,636	5,225	5,137	23	21	21	9.05%	1.43%	10.61%	12.70%	-1.68%	10.81%
3471	Electroplating, Plating, Polishing, Anodizing, and Coloring	67,806	72,226	70,554	3,161	3,442	3,180	21	21	21	6.52%	-2.31%	4.05%	8.89%	-7.61%	0.60%
3479	Coating, Engraving, and Allied Services, Not Elsewhere Classified	37,133	42,390	44,124	1,438	1,760	1,746	26	24	24	14.16%	4.09%	18.83%	22.39%	-0.80%	21.42%
348	Ordinance and Accessories, Except Vehicles and Guided Missiles	83,241	85,938	77,567	291	373	390	286	230	230	3.24%	-9.74%	-6.82%	28.18%	4.56%	34.02%
349	Misc. Fabricated Metal Products	308,739	275,546	291,915	5,579	7,768	9,063	55	35	35	-10.75%	5.94%	-5.45%	39.24%	16.67%	62.45%
35	Industrial and Commercial Machinery and Computer Equipment	2,505,762	1,917,059	1,922,159	46,224	53,011	51,717	54	36	36	-23.43%	0.27%	-23.23%	14.68%	-2.44%	11.88%
351	Engines and Turbines	129,671	88,081	88,506	283	369	328	458	239	239	-32.07%	0.48%	-31.75%	30.39%	-11.11%	15.90%
352	Farm and Garden Machinery and Equipment	168,059	88,492	97,266	1,945	1,879	1,789	86	47	47	-47.34%	9.92%	-42.12%	-4.38%	-4.79%	-8.56%
3523	Farm Machinery and Equipment	141,836	64,223	69,267	1,777	1,690	1,538	80	38	38	-54.72%	7.85%	-51.16%	-4.90%	-8.99%	-13.45%
3524	Lawn and Garden Tractors and Home Lawn and Garden Equipment	26,113	24,078	27,428	162	173	155	161	139	139	-7.79%	13.91%	5.04%	6.79%	-10.40%	-4.32%
353	Construction, Mining, and Materials Handling Machinery and Equipment	386,717	197,855	207,429	3,205	3,501	3,278	121	57	57	-48.84%	4.84%	-46.36%	9.24%	-6.37%	2.28%
3531	R Construction Machinery and Equipment	165,964	76,507	88,340	783	926	863	212	83	83	-53.90%	15.47%	-46.77%	18.26%	-6.80%	10.22%
3532	Min. Mach. and Equip., Excpt. Oil and Gas Field Mach. and Equip.	33,013	13,136	15,338	335	312	290	99	42	42	-60.21%	16.76%	-53.54%	-6.87%	-7.05%	-13.43%
3533	Oil and Gas Field Machinery and Equipment	83,720	29,505	30,136	666	635	572	126	46	46	-64.76%	2.14%	-64.00%	-4.65%	-9.92%	-14.11%
3534	Elevators and Moving Stairways	11,861	12,546	9,888	134	183	165	89	69	69	5.78%	-21.19%	-16.63%	36.57%	-9.84%	23.13%
3535	Conveyors and Conveying Equipment	38,889	34,026	32,831	584	690	672	67	49	49	-12.50%	-3.51%	-15.58%	18.15%	-2.61%	15.07%
3536	R Overhead Traveling Cranes, Hoists, and Monorail Systems	18,643	9,261	7738	245	212	158	76	44	44	-50.32%	-16.45%	-58.49%	-13.47%	-25.47%	-35.51%
3537	R Industrial Trucks, Tractors, Trailers, and Stackers	34,468	22,773	22,407	426	518	443	81	44	44	-33.93%	-1.61%	-34.99%	21.60%	-14.48%	3.99%
354	Metalworking Machinery and Equipment	364,067	256,879	286,205	10,573	10,650	11,253	34	24	24	-29.44%	11.42%	-21.39%	0.73%	5.66%	6.43%
3541	Machine Tools, Metal Cutting Types	73,956	37,688	32,748	1,005	709	496	74	53	53	-49.04%	-13.11%	-55.72%	-29.45%	-30.04%	-50.65%
3542	Machine Tools, Metal Forming Types	28,765	16,385	14,740	444	338	248	65	48	48	-43.04%	-10.04%	-48.76%	-23.87%	-26.63%	-44.14%
3543	Industrial Patterns			9,438			734									
3544	Spec. Dies and Tools, Die Sets, Jigs and Fixt., and Ind. Molds	131,693	114,710	122,970	6,999	7,328	7,040	19	16	16	-12.90%	7.20%	-6.62%	4.70%	-3.93%	0.59%
3545	Cut. Tools, Machine Tool Acces., and Machinists' Prec. Meas. Dev.	65,543	48,120	52,935	1,335	1,577	1,748	49	31	31	-26.58%	10.01%	-19.24%	18.13%	10.84%	30.94%
3546	Power-Driven Handtools	33,013	17,805	17,077	163	205	199	203	87	87	-46.07%	-4.09%	-48.27%	25.77%	-2.93%	22.09%
3547	Rolling Mill Machinery and Equipment	8,332	3,231	3,994	70	71	82	119	46	46	-61.22%	23.61%	-52.06%	1.43%	15.49%	17.14%
3548	Electric and Gas Welding and Soldering Equipment			19,262			210									
3549	R Metalworking Machinery, Not Elsewhere Classified	22,427	18,913	11,885	476	392	293	47	48	48	-15.67%	-37.16%	-47.01%	-17.65%	-25.26%	-38.45%
355	Special Industry Machinery, Except Metalworking Machinery	213,245	167,662	177,775	3,722	4,450	4,678	57	38	38	-21.38%	6.03%	-16.63%	19.56%	5.12%	25.69%
3551	R	38,972	28,871		674	686		58	42		-25.92%	-100.00%	-100.00%	1.78%	-100.00%	-100.00%
3552	Textile Machinery	27,673	16,330	17,352	574	507	500	48	32	32	-40.99%	6.26%	-37.30%	-11.67%	-1.38%	-12.89%
3553	Woodworking Machinery	12,003	8,814	10,066	258	275	284	47	32	32	-26.57%	14.20%	-16.14%	6.59%	3.27%	10.08%
3554	Paper Industries Machinery	19,577	14,983	19,486	215	249	285	91	60	60	-23.47%	30.05%	-0.46%	15.81%	14.46%	32.56%
3555	R Printing Trades Machinery and Equipment	31,439	26,007	22,149	538	502	430	58	52	52	-17.28%	-14.63%	-29.55%	-6.69%	-14.34%	-20.07%
3556	Food Products Machinery			20,355			466									
3559	R Special Industry Machinery, Not Elsewhere Classified	83,156	72,493	85,433	1,409	2,172	2,286	59	33	33	-12.82%	17.85%	2.74%	54.15%	5.25%	62.24%
356	General Industrial Machinery and Equipment	350,705	258,975	250,878	4,531	4,600	3,945	77	56	56	-26.16%	-3.13%	-28.46%	1.52%	-14.24%	-12.93%
357	Computer and Office Equipment	385,176	374,386	301,330	1,472	2,322	2,258	262	161	161	-2.80%	-19.51%	-21.77%	57.74%	-2.76%	53.40%
3571	Electronic Computers			126,003			783									
3572	R Computer Storage Devices	18,742	157	41,707	19	8	118	986	20	20	-99.16%	26464.97%	122.53%	-57.89%	1375.00%	521.05%
3573	R	313,430	323,027		1,092	1,883		287	172		3.06%	-100.00%	-100.00%	72.44%	-100.00%	-100.00%
3574	R	14,393	8,025		54	74		267	108		-44.24%	-100.00%	-100.00%	37.04%	-100.00%	-100.00%

SCREEN 2A: HISTORICAL GROWTH ANALYSIS OF MANUFACTURING INDUSTRIES

SIC Code	Industry Description	Total Employment			Total Establishments			Average Number Employees			% of Employment Growth			% of Establishment Growth		
		1980	1987	1990	1980	1987	1990	1980	1987	1990	1980-87	1987-90	1980-90	1980-87	1987-90	1980-90
3575	Computer Terminals			13,500			138									
3576	R Computer Peripheral Equipment, Not Elsewhere Classified	8,334	6,178		114	128		73	48		-25.87%	-100.00%	-100.00%	12.28%	-100.00%	-100.00%
3577	Calculating and Accounting Machines, Except Electronic Computers			78,141			597									
3578	Office Machines, Not Elsewhere Classified			9,437			84									
3579	Refrigeration and Service Industry Machinery	30,182	36,988	28,265	173	214	202	174	173	173	22.55%	-23.58%	-6.35%	23.70%	-5.61%	16.76%
358	Automatic Vending Machines	205,398	183,367	189,311	1,916	2,042	2,040	107	90	90	-10.73%	3.24%	-7.83%	6.58%	-0.10%	6.47%
3581	Commercial Laundry, Drycleaning, and Pressing Machines	9,770	8,047	7,577	90	99	89	109	81	81	-17.64%	-5.84%	-22.45%	10.00%	-10.10%	-1.11%
3582	R Air-Con. and Warm Air Heat. Equip. and Comm. and Ind. Refrigeration Equip	5,409	4,771	4,814	84	80	75	64	60	60	-11.80%	0.90%	-11.00%	-4.76%	-6.25%	-10.71%
3585	Measuring and Dispensing Pumps	144,652	130,882	131,229	784	860	885	185	152	152	-9.52%	0.27%	-9.28%	9.69%	2.91%	12.88%
3586	Service Industry Machinery, Not Elsewhere Classified	8,188	7,862	7,925	48	77	75	171	102	102	-3.98%	0.80%	-3.21%	60.42%	-2.60%	56.25%
3589	Misc. Ind. and Comm. Machinery and Equip.	37,378	31,805	37,757	908	926	914	41	34	34	-14.91%	18.71%	1.01%	1.98%	-1.30%	0.66%
36	Elect. and Other Elect. Equip. and Components, Except. Computer Equip.	300,526	300,911	321,217	18,512	22,990	21,663	16	13	13	0.13%	6.75%	6.88%	24.19%	-5.77%	17.02%
361	Electric Transmission and Distribution Equipment	2,026,537	1,977,294	1,556,961	13,756	17,570	17,222	147	113	113	-2.43%	-21.26%	-23.17%	27.73%	-1.98%	25.20%
3612	Power, Distribution, and Specialty Transformers	123,618	90,843	77,499	853	841	739	145	107	107	-27.16%	-13.93%	-37.31%	-1.41%	-12.13%	-13.36%
3613	R Switchgear and Switchboard Apparatus	46,745	35,021	33,483	273	288	275	171	118	118	-25.08%	-4.39%	-28.37%	9.16%	-7.77%	0.73%
362	Electrical Industrial Apparatus	76,863	55,022	43,992	575	542	463	134	102	102	-28.42%	-20.05%	-42.77%	-5.74%	-14.58%	-19.48%
363	Household Appliances	226,557	168,784	168,858	1,659	2,267	2,018	137	74	74	-25.50%	0.04%	-25.47%	36.65%	-10.98%	21.64%
364	R Electrical Lighting and Wiring Equipment	163,962	127,810	110,274	586	593	484	280	216	216	-22.05%	-13.72%	-32.74%	1.19%	-18.38%	-17.41%
3641	Electric Lamp Bulbs and Tubes	182,200	170,011	162,904	1,813	1,919	1,862	100	89	89	-6.69%	-4.18%	-10.59%	5.85%	-2.97%	2.70%
3643	Current-Carrying Wiring Devices	28,408	20,677	20,901	159	135	121	179	153	153	-27.21%	1.08%	-26.43%	-15.09%	-10.37%	-23.50%
3644	Noncurrent-Carrying Wiring Devices	49,458	49,643	44,377	387	429	415	128	116	116	0.37%	-10.61%	-10.27%	10.85%	-3.26%	7.24%
3645	Residential Electric Lighting Fixtures	29,311	23,300	23,573	197	206	201	149	113	113	-20.51%	1.17%	-19.58%	4.57%	-2.43%	2.03%
3646	Commercial, Industrial, and Institutional Electric Lighting Fixtures	25,762	25,989	19,354	562	592	522	46	44	44	0.88%	-25.49%	-24.84%	5.34%	-11.82%	-7.12%
3647	Vehicular Lighting Equipment	19,479	22,606	22,607	214	251	262	91	90	90	16.05%	0.00%	16.06%	17.29%	4.38%	22.43%
3648	Lighting Equipment, Not Elsewhere Classified	15,386	15,281	15,586	72	69	73	214	221	221	-0.68%	2.00%	1.30%	-4.17%	5.80%	1.39%
365	Household Audio and Video Equipment, and Audio Recordings	14,199	12,515	16,421	209	233	248	68	54	54	-11.86%	31.21%	15.65%	11.48%	6.44%	18.66%
3651	Household Audio and Video Equipment	86,945	58,850	49,987	933	883	821	93	67	67	-32.31%	-15.06%	-42.51%	-5.36%	-7.02%	-12.00%
3652	Phonograph Records and Pre-recorded Audio Tapes and Disks	67,457	44,357	33,673	440	394	395	153	113	113	-34.24%	-24.09%	-50.08%	-10.45%	0.25%	-10.23%
366	Communications Equipment	19,484	14,493	16,297	490	489	423	40	30	30	-25.62%	12.45%	-16.36%	-0.20%	-13.50%	-13.67%
3661	R Telephone and Telegraph Apparatus	575,832	642,257	249,188	2,181	2,734	1,789	264	235	235	11.54%	-61.20%	-56.73%	25.36%	-34.56%	-17.97%
3662	Radio and Television Broadcasting and Communications Equipment	150,990	107,527	93,952	259	382	433	583	281	281	-28.79%	-12.62%	-37.78%	47.49%	13.35%	67.18%
3663	Communications Equipment, Not Elsewhere Classified	424,789	534,508		1,913	2,313		222	231		25.83%	-100.00%	-100.00%	20.91%	-100.00%	-100.00%
3669	Electronic Components and Accessories			129,184			657									
367	R Electron Tubes	510,706	567,143	547,967	4,283	6,187	6,576	119	92	92	11.05%	-3.38%	7.30%	44.45%	6.29%	53.54%
3671	Printed Circuit Boards	39,281	30,440	31,277	100	77	172	393	395	395	-22.51%	2.75%	-20.38%	-23.00%	123.38%	72.00%
3672	Semiconductors and Related Devices	100	1,223	69,382	6	84	1,060	17	15	15	1123.00%	5573.10%	69282.00%	1300.00%	1161.90%	17566.67%
3673	Electronic Compactors	269	428		14	7.00		19	61		59.11%	-100.00%	-100.00%	-50.00%	-100.00%	-100.00%
3674	Electronic Resistors	158,104	180,737	181,279	640	860	858	247	210	210	14.32%	0.30%	14.66%	34.38%	-0.23%	34.06%
3675	Electronic Coils, Transformers, and Other Inductors	30,306	24,161	22,096	111	142	130	273	170	170	-20.28%	-8.55%	-27.09%	27.93%	-8.45%	17.12%
3676	Electronic Connectors	24,117	14,429	14,412	91	108	102	265	134	134	-40.17%	-0.12%	-40.24%	18.68%	-5.56%	12.09%
3677	R Electronic Component, Not Elsewhere Classified	26,774	21,895	22,475	307	393	392	87	56	56	-18.22%	2.65%	-16.06%	28.01%	-0.25%	27.69%
3678	Misc. Electrical Machinery, Equipment, and Supplies	38,355	33,761	38,127	143	231	249	268	146	146	-11.98%	12.93%	-0.59%	61.54%	7.79%	74.13%
3679	Storage Batteries	192,727	258,698	161,040	2,706	4,098	2,441	71	63	63	34.54%	-37.75%	-16.25%	51.44%	-40.43%	-9.79%
369	Primary Batteries, Dry and Wet	154,319	152,250	185,499	1,287	2,089	2,114	120	73	73	-1.34%	21.84%	20.20%	62.32%	1.20%	64.26%
3691	R Electrical Equipment for Internal Combustion Engines	25,827	20,556	23,518	197	185	153	131	111	111	-20.41%	14.41%	-8.94%	-6.09%	-17.30%	-22.34%
3692	Magnetic and Optical Recording Media	12,921	11,479	11,077	50	73	80	258	157	157	-11.16%	-3.50%	-14.27%	46.00%	9.59%	60.00%
3693	R Elect. Mach., Equipment, and Supplies, Not Elsewhere Classified	33,781	38,919		181	242		187	161		15.21%	-100.00%	-100.00%	33.70%	-100.00%	-100.00%
3694	Transportation Equipment	59,478	50,431	61,675	381	479	456	156	105	105	-15.21%	22.30%	3.69%	25.72%	-4.80%	19.69%
3695	Motor Vehicles and Motor Vehicle Equipment			25,471			215									
3699	Motor Vehicle and Passenger Car Bodies	22,304	30,421	63,394	476	1,017	1,185	47	30	30	36.39%	108.39%	184.23%	113.66%	16.52%	148.95%
37	Truck and Bus Bodies	1,855,912	1,823,573	1,797,524	8,369	10,300	10,787	222	177	177	-1.74%	-1.43%	-3.15%	23.07%	4.73%	28.89%
371	Motor Vehicle Parts and Accessories	778,449	740,610	707,160	3,524	4,270	4,487	221	173	173	-4.86%	-4.52%	-9.16%	21.17%	5.08%	27.33%
3711	Truck and Bus Bodies	305,646	299,173	239,756	292	434	406	1,047	689	689	-2.12%	-19.86%	-21.56%	48.63%	-6.45%	39.04%
3713	Motor Vehicle Parts and Accessories	37,323	37,214	39,614	654	698	657	57	53	53	-0.29%	6.45%	6.14%	6.73%	-5.87%	0.46%
3714	Truck Trailers	405,476	365,939	385,958	2,194	2,623	2,725	185	140	140	-9.75%	5.47%	-4.81%	19.55%	3.89%	24.20%
3715	Motor Homes	29,330	24,807	24,382	334	322	317	88	77	77	-15.42%	-1.71%	-16.87%	-3.59%	-1.55%	-5.09%
3716	Aircraft and Parts			14,947			152									
372	R Aircraft Parts and Auxiliary Equipment, Not Elsewhere Classified	581,741	619,612	624,341	1,190	1,520	1,767	489	408	408	6.51%	0.76%	7.32%	27.73%	16.25%	48.49%
3721	Ship and Boat Building and Repairing	297,147	304,690	299,972	151	229	181	1,968	1,275	1,275	2.54%	-1.55%	0.95%	58.28%	-24.27%	19.87%
3724	Railroad Equipment	137,165	142,941	133,607	276	410	442	497	349	349	4.21%	-6.53%	-2.59%	48.55%	7.80%	60.14%
3728	Motorcycles, Bicycles, and Parts	147,396	171,970	190,116	752	856	1,016	196	201	201	16.67%	10.55%	28.96%	13.83%	18.69%	35.11%
373	Guided Missiles and Space Vehicles	225,537	179,011	180,153	2,240	2,827	2,764	101	63	63	-20.63%	0.64%	-20.12%	26.21%	-2.23%	23.39%
374	Guided Missiles and Space Vehicles	72,593	22,260	28,629	187	196	185	388	114	114	-69.34%	28.61%	-60.56%	4.81%	-5.61%	-1.07%
375	Guided Missiles and Space Vehicles	20,334	12,339	9,923	270	244	241	75	51	51	-39.32%	-19.58%	-51.20%	-9.63%	-1.23%	-10.74%
376	Guided Missiles and Space Vehicles	136,243	195,512	201,073	107	124	143	1,273	1,577	1,577	43.50%	2.84%	47.58%	15.89%	15.32%	33.64%
3761	Guid. Miss. and Space Veh. Prop. Units and Prop. Unit Parts	100,012	137,091	156,968	33	35	46	3,031	3,917	3,917	37.07%	14.51%	56.97%	6.06%	31.43%	39.39%
3764	Guid. Miss. and Space Veh. Parts and Aux. Equip., Not Else. Classified	23,038	32,953	34,033	27	31	40	853	1,063	1,063	43.04%	3.28%	47.73%	14.81%	29.03%	48.15%
3769	Misc. Transportation Equipment	13,193	25,468	10,052	47	58	57	281	439	439	93.04%	-60.53%	-23.81%	23.40%	-1.72%	21.28%
379		40,914	54,148	44,783	820	1,109	962	50	49	49	32.35%	-17.30%	9.46%	35.24%	-13.26%	17.32%

SCREEN 2A: HISTORICAL GROWTH ANALYSIS OF MANUFACTURING INDUSTRIES

SIC Code	Industry Description	Total Employment			Total Establishments			Average Number Employees			% of Employment Growth			% of Establishment Growth		
		1980	1987	1990	1980	1987	1990	1980	1987	1990	1980-87	1987-90	1980-90	1980-87	1987-90	1980-90
38	Measur., Anal., and Control. Instr.; Photo., Med., and Opt. Goods	642,708	603,070	965,916	7,015	9,032	10,264	92	67	67	-6.17%	60.17%	50.29%	28.75%	13.64%	46.32%
381	Search, Det., Nav., Guid., Aero., and Naut. Systems, Instru., and Equip.	63,569	46,647	317,926	815	668	861	78	70	70	-26.62%	581.56%	400.13%	-18.04%	28.89%	5.64%
382	Lab. App. and Analytical, Opt., Measur., and Control. Instrument	227,187	208,849	289,930	2,827	2,977	3,928	112	70	70	-8.07%	38.82%	27.62%	46.87%	31.94%	93.78%
3821	Laboratory Apparatus and Furniture			18,650			250									
3822	Auto. Controls for Reg. Res. and Comm. Environ. and Appl.	37,321	25,938	25,990	223	245	243	167	106	106	-30.50%	0.20%	-30.36%	9.87%	-0.82%	8.97%
3823	Ind. Instru. for Mea., Disp., and Con. of Proc. Var.; and Rld. Prod.	48,524	53,358	53,388	471	753	748	103	71	71	9.96%	0.06%	10.02%	59.87%	-0.66%	58.81%
3824	Totalizing Fluid Meters and Counting Devices	18,471	9,965	13,736	113	159	162	163	63	63	-46.05%	37.84%	-25.63%	40.71%	1.89%	43.36%
3825	Instru. for Measur. and Test. of Electric. and Electric. Sig.	83,077	79,752	77,150	655	909	873	127	88	88	-4.00%	-3.26%	-7.13%	38.78%	-3.96%	33.28%
3826	Laboratory Analytical Instruments			36,970			530									
3827	Optical Instruments and Lenses			23,435			260									
3829	R Measuring and Controlling Devices, Not Elsewhere Classified	39,765	39,836	40,357	556	908	843	72	44	44	0.18%	1.31%	1.49%	63.31%	-7.16%	51.62%
383		43,727	56,396		496	703		88	80		28.97%	-100.00%	-100.00%	41.73%	-100.00%	-100.00%
384	Surgical and Medical Instruments and Apparatus	137,260	159,267	229,404	2,253	3,101	3,408	61	51	51	16.03%	44.04%	67.13%	37.64%	9.90%	51.26%
3841	Surgical and Medical Instruments and Apparatus	58,233	65,795	85,959	691	1,113	1,127	84	59	59	12.99%	30.65%	47.61%	61.07%	1.26%	63.10%
3842	Orthopedic, Prosthetic, and Surgical Appliances and Supplies	61,699	79,176	85,914	1,105	1,481	1,446	56	53	53	28.33%	8.51%	39.25%	34.03%	-2.36%	30.86%
3843	Dental Equipment and Supplies	17,326	14,296	15,428	454	507	505	38	28	28	-17.49%	7.92%	-10.95%	11.67%	-0.99%	11.23%
3844	X-Ray Apparatus and Tubes and Related Irradiation Apparatus			10,705			82									
3845	Electromedical and Electrotherapeutic Apparatus			31,332			241									
385	Ophthalmic Goods	31,412	26,338	31,964	439	507	531	72	52	52	-16.15%	21.36%	1.76%	15.49%	4.73%	20.96%
386	Photographic Equipment and Supplies	113,131	91,592	84,425	722	790	816	157	116	116	-19.04%	-7.82%	-25.37%	9.42%	3.29%	13.02%
387	Watches, Clocks, Clockwork Operated Devices, and Parts	26,318	13,790	9,802	217	215	179	121	64	64	-47.60%	-28.92%	-62.76%	-0.92%	-16.74%	-17.51%
39	Miscellaneous Manufacturing Industries	437,830	387,809	394,154	13,459	17,031	17,993	33	23	23	-11.42%	1.64%	-9.98%	26.54%	5.65%	33.69%
391	Jewelry, Silverware, and Plated Ware	56,937	48,089	47,239	2,663	2,964	2,725	21	16	16	-15.54%	-1.77%	-17.03%	11.30%	-8.06%	2.33%
393	Musical Instruments	25,055	14,234	12,625	402	435	404	62	33	33	-43.19%	-11.30%	-49.61%	8.21%	-7.13%	0.50%
394	Dolls, Toys, Games and Sporting and Athletic Goods	113,956	86,896	93,612	2,234	2,741	2,697	51	32	32	-23.75%	7.73%	-17.85%	22.69%	-1.61%	20.73%
395	Pens, Pencils, and Other Artists' Materials	34,377	30,503	31,130	902	1,032	962	38	30	30	-11.27%	2.06%	-9.45%	14.41%	-6.78%	6.65%
396	Cost. Jewelry, Cost. Novel, Buttons, and Misc. Notions, Except Prec. Metal	48,134	42,392	31,554	1,214	1,309	1,018	40	32	32	-11.98%	-25.57%	-34.45%	7.83%	-22.23%	-16.14%
399	Misc. Manufacturing Industries	158,738	164,091	160,839	5,818	8,025	7,382	27	20	20	3.37%	-1.96%	1.32%	37.93%	-8.01%	26.88%
3991	Brooms and Brushes	16,419	12,615	12,704	342	303	264	48	42	42	-23.17%	0.71%	-22.63%	-11.40%	-12.87%	-22.81%
3993	Signs and Advertising Specialties	54,886	65,349	65,072	2,852	3,812	3,670	19	17	17	19.10%	-0.45%	18.56%	33.66%	-3.73%	28.68%
3995	Burial Caskets	12,009	8,664	8,495	297	225	205	40	39	39	-27.85%	-1.95%	-29.26%	-24.24%	-8.89%	-30.98%
3996	Lin., Asph.-Felt-Base, and Other Hd. Surface Fir. Cov., Not Else. Classified	5,706	5,763	6,953	14	17	19	408	339	339	1.02%	20.65%	21.88%	21.43%	11.76%	35.71%
3999	R Manufacturing Industries, Not Elsewhere Classified	69,696	71,649	67,101	2,308	3,664	3,217	30	20	20	2.80%	-6.35%	-3.72%	58.75%	-12.20%	39.38%

R = Reclassified in 1987 Standard Industrial Classification Manual.

Source: County Business Patterns and Leland Consulting Group.

SCREEN 2B: HISTORICAL GROWTH ANALYSIS OF NON-MANUFACTURING INDUSTRIES

SIC Code	Industry Description	Total Employment			Total Establishments			Average Number of Employees			% of Employment Growth			% of Establishment Growth		
		1980	1987	1990	1980	1987	1990	1980	1987	1990	1980-87	1987-90	1980-90	1980-87	1987-90	1980-90
41	Local and Sub. Tran. and Interior, High. Pass. Transp.	269,025	299,157	329,040	12,887	15,180	15,126	21	20	22	11.20%	9.99%	22.31%	17.79%	-0.36%	17.37%
411	Local and Suburban Passenger Transport	70,218	112,638	135,160	3,272	5,582	5,883	21	20	23	60.41%	20.00%	92.49%	70.60%	5.39%	79.80%
412	Taxis	56,328	34,296	32,010	4,286	3,434	3,011	13	10	11	-39.11%	-6.67%	-43.17%	-19.86%	-12.32%	-29.75%
413	Intercity	38,996	26,243	22,490	745	704	519	52	37	43	-32.01%	-14.30%	-41.73%	-5.50%	-26.28%	-30.34%
414	Bus Charter Service	8,667	16,539	18,967	415	701	717	21	24	26	90.83%	14.68%	118.84%	68.92%	2.28%	72.77%
415	School Bus	90,978	96,646	105,448	3,546	3,329	3,355	26	29	31	6.23%	9.11%	15.90%	-6.12%	0.78%	-5.39%
417	Term. and Serv. Pac. for Motor Vehicle Pass. Trans.	2,842	3,076	1,836	249	301	184	11	10	10	8.23%	-40.31%	-35.40%	20.88%	-38.87%	-26.10%
42	Motor Freight Transportation and Warehousing	1,284,308	1,428,571	1,574,833	77,014	102,781	103,269	17	14	15	11.23%	10.24%	22.62%	33.46%	0.47%	34.09%
421	Trucking and Courier Services, Except Air	1,169,029	1,324,500	1,458,847	69,796	94,000	90,709	17	14	16	13.30%	10.14%	24.79%	34.68%	-3.50%	29.96%
422	Public Warehousing and Storage	84,306	80,780	89,363	5,834	7,544	7,532	14	11	12	-4.18%	10.63%	6.00%	29.31%	-0.16%	29.11%
423	Term. and Jt. Term. Maint. Pac. for Motor Frt. Transp.	29,181	22,050	2,699	854	718	147	34	31	18	-24.44%	-87.76%	-90.75%	-15.93%	-79.53%	-82.79%
44	Water Transportation	208,666	165,956	158,031	6,793	8,140	7,008	31	20	22	-20.47%	-4.78%	-24.27%	19.83%	-12.92%	4.34%
441	Deep Sea Foreign Transportation of Freight	19,122	14,118	14,277	292	337	244	65	42	59	-26.17%	1.13%	-25.34%	15.41%	-27.60%	-16.44%
442	Deep Sea Transportation of Freight	8,297	13,119	9,546	129	199	183	64	66	52	58.12%	-27.24%	15.05%	54.26%	-8.04%	41.86%
443	Freight Transportation on the Great Lakes	1,661	1,031	1,091	39	34	24	43	30	45	-37.93%	5.82%	-34.32%	-12.82%	-29.41%	-38.46%
444	Water Transp. of Frt., Not Else. Class.	16,143	13,858	10,611	314	330	259	51	42	41	-14.15%	-23.43%	-34.27%	5.10%	-21.52%	-17.52%
445		34,586	26,837		1,469	1,289		24	21		-22.41%			-12.25%		
446		124,540	96,748		4,121	5,896		30	16		-22.32%			43.07%		
448	Water Transportation of Passengers			15,377			506			30						
449	Services Incident to Water Transportation			101,389			5,117			20						
45	Transportation By Air	441,962	549,039	674,058	6,152	8,469	9,631	72	65	70	24.23%	22.77%	52.51%	37.66%	13.72%	56.55%
451	Air Transp., Sched. and Air Cour. Services	384,726	480,642	571,097	3,766	5,458	5,242	102	88	109	24.93%	18.82%	48.44%	44.93%	-3.96%	39.19%
452	Air Transportation, Nonscheduled			15,321			908			17						
458	Airports, Flying Fields, and Airport Terminal Services	50,008	67,478	84,323	2,070	2,822	2,777	24	24	30	34.93%	24.96%	68.62%	36.33%	-1.59%	34.15%
46	Pipelines, Except Natural Gas	16,486	16,315	15,310	518	607	660	32	27	23	-1.04%	-6.16%	-7.13%	17.18%	8.73%	27.41%
461	Pipelines, Except Natural Gas		16,278	15,193		598	649		27	23		-6.67%			8.53%	
47	Transportation Services	213,051	315,316	370,094	22,381	38,967	42,520	10	8	9	48.00%	17.37%	73.71%	74.11%	9.12%	89.98%
471		41,174	58,405		2,795	4,027		15	15		41.85%			44.08%		
472	Arrangement of Passenger Transportation	145,051	227,751	197,144	17,944	32,850	28,295	8	7	7	57.01%	-13.44%	35.91%	83.07%	-13.87%	57.69%
4724	R Travel Agencies			146,877			22,737			6						
4725	R Tour Operators			26,762			2,239			12						
4729	R Arrang. of Pass. Transp., Not Elsewhere Classified			14,575			1,320			11						
473	Arrangement of Transportation of Freight and Cargo			115,956			8,905			13						
474	Rental of Railroad Cars	2,812	1,853	2,579	97	137	148	29	14	17	-34.10%	39.18%	-8.29%	41.24%	8.03%	52.58%
478	Misc. Services Incident to Transportation		26,125	33,929		1,479	1,673		18	20		29.87%			13.12%	
48	Communications	1,318,909	1,201,544	1,273,849	24,167	32,320	33,095	55	37	38	-8.90%	6.02%	-3.42%	33.74%	2.40%	36.94%
481	Telephone Communications	1,051,108	811,361	859,506	13,383	17,790	18,355	79	46	47	-22.81%	5.93%	-18.23%	32.93%	3.18%	37.15%
482	Telegraph and Other Message Communications	13,713	10,512	12,788	764	883	576	18	12	22	-23.34%	21.65%	-6.75%	15.58%	-34.77%	-24.61%
483	Radio and Television Broadcasting Stations	187,411	226,298	236,313	6,253	7,822	7,899	30	29	30	20.75%	4.43%	26.09%	25.09%	0.96%	26.32%
484	Cable and Other Pay Television Services			120,212		3,527	3,478		0	35						-1.39%
489	Communications Services, Not Elsewhere Classified	64,679	150,357	34,609	3,527	5,400	1,201	18	28	29	132.47%	-76.98%	-46.49%	53.10%	-77.76%	-65.95%
49	Electric, Gas, and Sanitary Services	743,184	847,883	871,335	15,735	18,042	19,471	47	47	45	14.09%	2.77%	17.24%	14.66%	7.92%	23.74%
491	Electric Services	369,474	440,133	436,002	4,498	4,855	4,934	82	91	88	19.12%	-0.94%	18.01%	7.94%	1.63%	9.69%
492	Gas Productions and Distribution	130,708	135,831	132,169	2,916	3,305	3,485	45	41	38	3.92%	-2.70%	1.12%	13.34%	5.45%	19.51%
493	Comb. Electric and Gas, and Other Utility Services	163,703	160,863	154,550	959	1,026	1,114	171	157	139	-1.73%	-3.92%	-5.59%	6.99%	8.58%	16.16%
494	Water Supply	21,342	23,520	24,976	2,836	3,197	3,237	8	7	8	10.21%	6.19%	17.03%	12.73%	1.25%	14.14%
495	Sanitary Services	50,065	78,717	109,885	3,758	4,460	5,110	13	18	22	57.23%	39.60%	119.48%	18.68%	14.57%	35.98%
496	Steam and Air-Conditioning Supply	4,085	2,781	2,461	58	66	74	70	42	36	-31.92%	-4.31%	-34.86%	13.79%	12.12%	27.59%
497	Irrigation Systems	1,801	2,100	1,908	302	336	331	6	6	6	16.60%	-9.14%	5.94%	11.26%	-1.49%	9.60%
50	Wholesale Trade-Durable Goods	2,963,882	3,235,728	3,559,542	232,252	287,779	299,697	13	11	12	9.17%	10.02%	20.11%	23.91%	4.14%	29.04%
501	Motor Vehicles and Motor Vehicle Parts and Supplies	458,732	445,723	463,761	37,517	40,470	42,678	12	11	11	-2.84%	8.53%	5.46%	7.87%	5.46%	13.76%
502	Furniture and Home furnishings	123,778	147,300	155,321	10,788	14,279	13,914	11	10	11	19.00%	5.45%	25.48%	32.36%	-2.56%	28.98%
503	Lumber and Other Construction Materials	212,996	223,179	237,939	16,407	18,819	19,321	13	12	12	4.78%	6.61%	11.71%	14.70%	2.67%	17.76%
504	Professional and Commercial Equipment and Supplies	86,428	94,319	743,390	6,126	8,500	40,948	14	11	18	9.13%	688.17%	760.13%	38.75%	381.74%	568.43%
5041		38,550	41,295		3,146	4,552		12	9		7.12%			44.69%		
5042		18,677	22,720		1,565	2,238		12	10		21.65%			43.00%		
5043	Photographic Equipment and Supplies	27,008	30,126	31,529	1,199	1,560	1,372	23	19	23	11.54%	4.66%	16.74%	34.60%	-12.05%	18.38%
5044	Office Equipment			196,197			10,103			19						
5045	Comp. and Computer Periph. Equip. and Software			288,723			12,514			23						
5046	Commercial Equipment, Not Elsewhere Classified			52,073			4,801			11						
5047	Med., Dental, and Hospital Equip. and Supplies			109,464			7,528			15						
5048	Ophthalmic Goods			27,998			1,803			16						
5049	Prof. Equip. and Supplies, Not Elsewhere Classified			34,698			2,629			13						
505	Metals and Minerals, Except Petroleum	154,182	136,651	152,617	9,339	10,239	10,922	17	13	14	-11.37%	11.68%	-1.02%	9.64%	6.67%	16.95%
506	Electrical Goods	330,383	421,953	438,377	25,635	33,632	34,032	13	13	13	27.72%	3.89%	32.69%	31.20%	-1.19%	32.76%

SCREEN 2B: HISTORICAL GROWTH ANALYSIS OF NON-MANUFACTURING INDUSTRIES

SIC Code	Industry Description	Total Employment			Total Establishments			Average Number of Employees			% of Employment Growth			% of Establishment Growth		
		1980	1987	1990	1980	1987	1990	1980	1987	1990	1980-87	1987-90	1980-90	1980-87	1987-90	1980-90
507	Hardw., and Plumb. and Heating Equip. and Supplies	219,676	229,545	247,182	19,023	22,646	22,827	12	10	11	4.49%	7.68%	12.52%	19.05%	0.80%	20.00%
508	Machinery, Equipment, and Supplies	1,188,019	1,321,727	1,377,019	87,630	110,785	74,776	14	12	10	11.25%	-41.51%	-34.93%	26.42%	-32.50%	-14.67%
509	Misc. Durable Goods		212,467	292,774		27,429	30,186		8	10			37.80%		10.05%	
51	Wholesale Trade-Non-durable Goods	1,985,772	2,284,199	2,433,023	147,046	172,894	170,969	14	13	14	15.03%	6.52%	22.52%	17.58%	-1.11%	16.27%
511	Paper and Paper Products	169,189	221,672	245,740	11,846	16,558	16,858	14	13	15	31.02%	10.86%	45.25%	39.78%	1.81%	42.31%
5111	Printing and Writing Paper	32,393	36,535	35,922	1,300	1,928	1,924	25	19	19	12.79%	-1.68%	10.89%	48.31%	-0.21%	48.00%
5112	Stationery and Office Supplies	80,270	123,249	136,384	6,498	10,022	9,326	12	12	15	53.54%	10.66%	69.91%	54.23%	-6.94%	43.52%
5113	Industrial and Personal Service Paper	55,194	61,843	69,718	3,753	4,518	4,667	15	14	15	12.05%	12.73%	26.31%	20.38%	3.30%	24.35%
512	Drugs, Drug Proprietarys, and Druggists' Sundries	97,415	113,785	136,291	3,389	4,431	5,185	29	26	26	16.80%	19.78%	39.91%	30.75%	17.02%	52.99%
513	Apparel, Piece Goods, and Notions	140,381	175,720	199,446	12,495	16,828	17,338	11	10	12	25.17%	13.50%	42.07%	34.68%	3.03%	38.76%
514	Groceries and Related Products	639,066	773,782	820,381	35,636	42,031	40,766	18	18	20	21.06%	6.02%	28.37%	17.95%	-3.01%	14.40%
515	Farm-Product Raw Materials	138,233	117,958	110,520	13,675	12,617	11,856	10	9	9	-14.67%	-6.31%	-20.05%	-7.74%	-6.03%	-13.30%
516	Chemicals and Allied Products	107,175	129,315	144,280	8,607	11,658	12,463	12	11	12	20.66%	11.57%	34.62%	35.45%	6.91%	44.80%
517	Petroleum and Petroleum Products	183,099	178,263	171,238	18,552	16,664	14,951	10	11	11	-2.64%	-3.94%	-6.48%	-10.18%	-10.28%	-19.41%
518	Beer, Wine, and Distilled Alcoholic Beverages	134,994	147,345	142,884	6,141	5,831	5,358	22	25	27	9.15%	-3.03%	5.84%	-5.05%	-8.11%	-12.75%
519	Misc. Non-durable Goods	375,286	426,330	460,611	36,281	46,214	45,779	10	9	10	13.60%	8.04%	22.74%	27.38%	-0.94%	26.18%
5191	Farm Supplies	143,504	138,686	136,212	17,251	19,153	16,391	8	7	8	-3.36%	-1.78%	-5.06%	11.03%	-14.42%	-4.99%
5192	R Books, Periodicals, and Newspapers			75,355			3,699			20						
5193	R Flowers, Nursery Stock, and Florists' Supplies			43,304			3,327			13						
5194	Tobacco and Tobacco Products	36,058	37,802	43,703	1,821	1,732	1,522	20	22	29	4.84%	15.61%	21.20%	-4.89%	-12.12%	-16.42%
5198	Paints, Varnishes, and Supplies	28,053	29,668	30,472	3,064	3,551	3,438	9	8	9	5.76%	2.71%	8.62%	15.89%	-3.18%	12.21%
5199	Non-durable Goods, Not Elsewhere Classified	163,250	218,878	115,968	13,176	21,221	12,796	12	10	9	34.08%	-47.02%	-28.96%	61.06%	-39.70%	-2.88%
60	Depository Institutions	1,496,722	1,650,646	2,032,758	46,184	55,856	81,242	32	30	25	10.28%	23.15%	35.81%	20.94%	45.45%	75.91%
601	Central Reserve Depository Institutions	20,502	25,439	30,513	50	93	118	410	274	259	24.08%	19.95%	48.83%	86.00%	26.86%	136.00%
602	Commercial Banks	1,380,372	1,495,695	1,472,304	41,906	50,105	52,303	33	30	28	8.35%	-1.56%	6.66%	19.57%	4.39%	24.81%
603	Savings Institutions	59,311	78,369	416,571	2,223	2,800	21,689	27	28	19	32.13%	431.55%	602.35%	25.96%	674.61%	875.66%
604		3,351	3,718		115	102			36		10.95%			-11.30%		
605		28,232	47,178		1,630	2,721			17		67.11%			66.93%		
606	Credit Unions			50,642			3,650			14			1411.25%			
608	Foreign Bank, & Branches and Ag. of For. Banks			13,317			235			57			-52.83%			
609	Functions Related To Depository Banking			43,937			2,778			16			-92.52%			
61	Nondepository Credit Institutions	587,432	892,177	505,793	60,339	64,306	41,975	0	14	12	51.83%	-43.31%	40298.80%	6.57%	-34.73%	-30.43%
611	Federal and Federally-Sponsored Credit Agencies	1,252	3,390	313,529	60	75	577		45	543	170.77%	9148.64%		25.00%	669.33%	861.67%
612		235,383	360,702		15,065	18,148			20		53.24%			20.46%		
613		15,872	16,044		1,360	1,009			16		1.08%			-25.81%		
614	Personal Credit Institutions	218,416	254,938	236,318	36,133	29,948	24,960	6	9	9	16.72%	-7.30%	8.20%	-17.12%	-16.66%	-30.92%
615	Business Credit Institutions	50,074	84,445	87,608	2,416	3,460	3,719	21	24	24	68.64%	3.75%	74.96%	43.21%	7.49%	53.93%
616	Mortgage Bankers and Brokers	62,955	171,854	152,809	4,652	11,479	10,867	14	15	14	172.98%	-11.08%	142.73%	146.75%	-5.33%	133.60%
62	Sec. and Comm. Brokers, Dealers, Exch., and Serv.	214,969	433,317	410,826	11,279	22,439	24,164	19	19	17	101.55%	-5.19%	91.09%	98.94%	7.69%	114.24%
621	Security Brokers, Dealers, and Floatation Companies	174,071	351,084	308,078	7,611	13,697	15,894	23	26	19	101.69%	-12.25%	76.98%	79.96%	16.04%	108.83%
622	Commodity Contracts Broker and Dealers	9,449	14,201	14,736	863	1,419	1,158	11	10	13	50.29%	3.77%	55.95%	64.43%	-18.39%	34.18%
623	Security and Commodity Exchanges	5,969	7,294	9,149	110	140	150	54	52	61	22.20%	25.43%	53.28%	27.27%	7.14%	36.36%
628	Serv. Allied W/ the Exch. of Sec. or Commodities	24,270	59,512	75,740	2,493	6,828	7,087	10	9	11	145.21%	27.27%	212.07%	173.89%	3.79%	184.28%
63	Insurance Carriers	1,233,831	1,340,622	1,406,594	33,167	41,102	43,305	37	33	32	8.66%	4.92%	14.00%	23.92%	5.36%	30.57%
631	Life Insurance	562,935	564,281	571,775	15,615	14,491	14,057	36	39	41	0.24%	1.33%	1.57%	-7.20%	-2.99%	-9.98%
632	Acc. and Health Ins. and Medical Service Plans	124,515	167,151	187,605	1,576	2,135	2,092	79	78	90	34.24%	12.24%	50.67%	35.47%	-2.01%	32.74%
6321	Accident and Health Insurance	26,999	43,280	47,878	845	1,198	1,067	32	36	45	60.30%	10.62%	77.33%	41.78%	-10.93%	26.27%
6324	Hospital and Medical Service Plans	96,662	122,504	139,255	725	930	1,015	133	132	137	26.73%	13.67%	44.06%	28.28%	9.14%	40.00%
633	Fire, Marine, and Casualty Insurance	448,963	494,286	532,536	9,236	13,159	18,335	49	38	29	10.09%	7.74%	18.61%	42.48%	39.33%	98.52%
635	Surety Insurance	7,660	9,905	14,629	450	518	586	17	19	25	29.31%	47.69%	90.98%	15.11%	13.13%	30.22%
636	Title Insurance	51,008	60,313	56,650	2,714	3,129	3,196	19	19	18	18.24%	-6.07%	11.06%	15.29%	2.14%	17.76%
637	Pension, Health, and Welfare Funds	32,954	30,601	25,063	3,157	6,707	3,780	10	5	7	-7.14%	-18.10%	-23.95%	112.45%	-43.64%	19.73%
639	Insurance Carriers, Not Elsewhere Classified	3,310	6,682	7,881	176	284	262	19	23	30	101.87%	17.94%	138.10%	62.50%	-8.39%	48.86%
64	Insurance Agents, Brokers, and Service	462,521	656,743	712,305	78,833	106,904	110,834	6	6	6	41.99%	8.46%	54.00%	35.61%	3.68%	40.99%
65	Real Estate	989,241	1,298,096	1,374,297	169,952	214,997	216,968	6	6	6	31.22%	5.87%	38.92%	26.50%	0.93%	27.68%
651	Real Estate Op. (Except Developers) and Lessors	462,459	464,892	509,078	94,750	96,953	95,676	5	5	5	4.85%	4.99%	10.08%	2.33%	-1.32%	0.98%
653	Real Estate Agents and Managers	362,430	601,547	584,669	50,998	84,907	72,243	7	7	8	65.98%	-2.81%	61.32%	66.49%	-14.92%	41.66%
654	Title Abstract Offices	20,851	26,901	23,880	2,895	3,232	3,067	8	8	8	29.02%	-11.23%	14.53%	19.93%	-5.11%	13.80%
655	Land Subdividers and Developers	110,676	144,443	140,267	13,029	19,957	19,650	8	7	7	30.51%	-2.89%	26.74%	53.17%	-1.54%	50.82%
66		30,243	23,474		6,426	4,275			5		-22.38%			-33.47%		
67	Holding Offices and Other Investment Offices	139,938	239,664	263,153	13,135	23,706	22,588	11	10	12	71.26%	9.80%	88.05%	80.48%	-4.72%	71.97%
671	Holding Offices	63,002	115,203	123,470	3,605	5,534	6,241	17	21	20	82.86%	7.18%	95.96%	53.51%	12.78%	73.12%
672	Investment Offices	7,685	12,587	16,106	764	1,179	967	10	11	17	68.16%	27.96%	115.18%	54.32%	-17.98%	26.57%
673	Trusts	39,649	61,248	65,299	4,240	9,696	7,849	9	6	8	54.48%	6.61%	64.69%	128.68%	-19.05%	85.12%



SCREEN 2B: HISTORICAL GROWTH ANALYSIS OF NON-MANUFACTURING INDUSTRIES

SIC Code	Industry Description	Total Employment			Total Establishments			Average Number of Employees			% of Employment Growth			% of Establishment Growth		
		1980	1987	1990	1980	1987	1990	1980	1987	1990	1980-87	1987-90	1980-90	1980-87	1987-90	1980-90
679	Misc. Investing	24,747	50,229	43,452	3,701	7,128	5,812	7	7	9	102.97%	-13.49%	75.58%	92.60%	-29.69%	35.42%
70	Hotels, Room, Houses, Camps, and Other Lodg. Places	1,085,973	1,360,021	1,528,711	41,418	51,409	50,636	26	26	30	25.24%	12.40%	40.77%	24.12%	-1.50%	22.26%
701	Hotels and Boarding Houses	1,034,352	1,304,786	1,463,053	32,102	40,799	39,247	32	32	37	26.15%	12.13%	41.45%	26.90%	-3.66%	22.26%
702	Rooming and Boarding Houses	13,425	11,918	8,745	1,914	1,880	1,585	7	6	6	-11.23%	-26.62%	-34.86%	-1.78%	-15.69%	-17.19%
703	Camps and Recreational Vehicle Parks	16,600	25,389	27,102	3,575	5,486	5,489	5	5	5	52.95%	6.75%	63.27%	53.45%	-0.67%	52.42%
704	Org. Hotel and Lodg. House, on Membership Basis	20,246	13,341	12,129	3,393	2,708	2,257	6	5	5	-34.11%	-9.08%	-40.09%	-20.19%	-16.65%	-33.46%
72	Personal Services	953,081	1,184,033	1,196,387	152,322	193,777	186,142	6	6	6	24.23%	1.04%	25.53%	27.27%	-3.94%	22.20%
721	Laundry, Cleaning, and Garment Services	358,812	406,459	418,017	40,237	50,714	50,355	9	8	8	13.28%	2.84%	16.50%	26.04%	-0.71%	25.15%
722	Photographic Studios, Portraits	41,376	51,317	56,257	6,171	9,507	9,747	7	5	6	24.03%	9.63%	35.97%	54.06%	2.52%	57.95%
723	Beauty Shops	285,439	399,223	370,969	65,669	79,046	76,148	4	5	5	25.85%	3.28%	29.97%	20.37%	-3.67%	15.96%
724	Barber Shops	25,853	20,871	16,360	8,864	6,608	5,115	3	3	3	-19.27%	-21.61%	-36.72%	-25.45%	-22.59%	-42.29%
725	Shoe Repair Shops and Shoeshine Parlors	6,937	6,992	6,512	2,515	2,901	2,528	3	2	3	0.79%	-6.86%	-6.13%	15.35%	-12.86%	0.52%
726	Funeral Service and Crematories	70,652	83,255	84,839	13,974	15,448	14,880	5	5	6	17.84%	1.90%	20.08%	10.55%	-3.68%	6.48%
729	Misc. Personal Services	161,214	254,571	219,033	14,028	28,918	21,435	11	9	10	57.91%	-13.96%	35.86%	106.14%	-25.88%	52.80%
73	Business Services	2,995,907	4,994,188	5,118,730	161,446	331,890	292,266	19	15	18	66.70%	2.49%	70.86%	105.57%	-11.94%	81.03%
731	Advertising	139,726	204,177	203,725	10,645	19,046	19,059	13	11	11	46.13%	-0.22%	45.80%	78.92%	0.07%	79.04%
7311	Advertising Agencies	99,538	146,386	137,373	7,443	13,955	11,068	13	10	12	47.07%	-6.16%	38.01%	87.49%	-20.69%	48.70%
7312	Outdoor Advertising Services	10,744	14,367	12,908	777	1,173	1,047	14	12	12	33.72%	-10.16%	20.14%	50.97%	-10.74%	34.75%
7313	Radio, Tele., and Publishers' Advert. Representatives	15,669	24,021	20,910	1,018	1,811	1,611	15	13	13	53.30%	-12.95%	33.45%	77.90%	-11.04%	58.25%
7319	Advertising, Not Elsewhere Classified	10,675	18,619	19,733	738	1,613	1,535	14	12	13	74.42%	5.98%	84.85%	118.56%	-4.84%	107.99%
732	Con. Credit, Merc., Adjust. and Collect. Agencies	64,826	86,266	93,873	5,579	7,054	6,580	12	12	14	33.07%	8.82%	44.81%	26.44%	-6.72%	17.94%
733	Mail, Repro., Comm. Art and Photo., and Steno. Serv.	135,509	210,607	232,655	14,554	25,093	26,181	9	8	9	55.42%	10.47%	71.69%	72.41%	4.34%	79.89%
734	Services to Dwellings and Other Buildings	496,916	697,165	802,218	23,376	47,178	48,534	21	15	17	40.30%	15.07%	61.44%	101.82%	2.87%	107.62%
7341	R Disinfecting and Pest Control Services	7,101	5,929		1,023	1,047		6			-16.50%		2.35%			
7342	R Disinfecting and Pest Control Services	47,436	65,527	68,858	5,652	9,415	9,073	8	7	8	38.14%	5.08%	45.16%	66.58%	-3.63%	60.53%
7349	R Build. Clean. and Maint. Serv., Not Elsewhere Class.	441,648	623,945	729,515	16,606	36,159	38,557	27	17	19	41.28%	16.92%	65.18%	117.75%	6.63%	132.19%
735	Misc. Equipment Rental and Leasing	5,848	8,922	209,088	376	611	22,578	16	15	9	52.56%	2243.51%	3475.38%	62.50%	3595.25%	5904.79%
736	Personnel Supply Services	569,306	1,078,810	1,517,893	13,652	23,682	27,832	42	46	56	89.50%	40.70%	166.62%	73.47%	14.15%	98.01%
7361	Employment Agencies	109,085	233,012	246,949	7,991	12,621	12,846	14	18	19	113.61%	5.98%	126.38%	57.94%	1.78%	60.76%
7362	R	416,071	800,227		5,178	10,611		75			92.33%		104.92%			
7369	R	43,909	45,122		452	398		113			2.76%		-11.95%			
737	Comp. Prog., Data Process., & Other Comp. Rtd. Serv.	303,317	618,607	772,736	13,610	35,896	40,472	22	17	19	103.95%	24.92%	154.76%	163.75%	12.75%	197.37%
7371	Computer Programming Services			217,239			12,443	0		17						182.80%
7372	R Prepackaged Software	83,116	272,806	76,343	4,400	17,387	7,355	14	16	20	228.22%	-72.02%	-8.15%	295.16%	-78.40%	-38.95%
7373	Computer Integrated Systems Design			81,584			3,273	0		25						48.17%
7374	R Comp. Process. and Data Prep. and Process. Serv.	187,239	259,450	228,884	6,151	8,971	6,773	2	29	34	38.57%	-11.78%	22.24%	45.85%	-24.50%	-91.03%
7375	Information Retrieval Services			16,654			508			33						
7376	Computer Facilities Management Services			24,310			639			38						
7377	Computer Rental and Leasing			15,216			808			19						
7378	Computer Maintenance and Repair	30,049		53,249	2,209		3,294	0		16			77.21%			
7379	R Comp. Rtd. Services, Not Elsewhere Classified		86,081	51,208		9,186	6,823		9	8		-40.51%			-25.72%	
738	Misc. Business Services			1,092,785			62,654			17						
7381	R Detective, Guard, and Armored Car Services			467,331			9,417			50						
7382	R Security Systems services			48,898			2,264			22						
7383	News Syndicates			10,034			576			17						
7384	R Photofinishing Laboratories			76,038			6,190			12						
7389	R Business Services, Not Elsewhere Classified			489,578			44,079			11						
739	Business Services, Not Elsewhere Classified	1,269,913	2,079,657		75,506	168,688			12		63.76%			123.41%		
75	Automotive Repair, Services, and Parking	559,891	782,779	876,852	99,514	149,761	156,648	6	5	6	39.81%	12.02%	56.61%	50.49%	4.60%	57.41%
751	Auto. Rental and Leasing, Without Drivers	100,832	139,152	146,515	8,694	10,730	10,460	12	13	14	38.00%	5.29%	45.31%	23.42%	-2.52%	20.31%
752	Automotive Parking	35,309	45,324	52,827	7,013	8,654	8,868	5	5	6	28.36%	16.55%	49.61%	23.40%	2.47%	26.45%
753	Automotive Repair Shops	358,778	483,393	507,361	75,082	114,036	112,744	5	4	5	34.73%	4.96%	41.41%	51.88%	-1.13%	50.16%
7531	R	94,585	137,658		19,665	29,273			5		45.54%			48.86%		
7532	R Top, Body, and Up. Repair Shops and Paint Shops			163,625			30,502			5			1044.47%			
7533	Automotive Exhaust System Repair Shops			21,772			4,651			5						
7534	Tire Retreading and Repair Shops	14,297	13,366		1,576	1,848	1,681		7	8	-6.37%	-3.98%		17.26%	-9.04%	6.66%
7535	R	14,441	15,796		2,181	2,489			6		9.38%			14.12%		
7536	Automotive Glass Replacement Shops			20,120			3,529			6						
7537	Automotive Transmission Repair Shops			23,802			5,523			4						
7538	General Automotive Repair Shops	150,227	206,869	214,445	34,805	55,686	54,796	4	4	4	37.70%	3.66%	42.75%	59.99%	-1.60%	57.44%
7539	R Automotive Repair Shops, Not Elsewhere Classified	83,961	109,027	41,062	16,510	24,316	9,521	5	4	4	29.85%	-62.34%	-51.09%	47.28%	-60.84%	-42.33%
754	Automotive Services, Except Repair	62,323	113,883	145,073	7,914	15,769	18,064	8	7	8	82.73%	27.39%	132.78%	99.25%	14.55%	128.25%
7542	Carwashes	42,498	72,879	86,302	4,960	8,840	9,545	9	8	9	71.49%	21.16%	107.78%	78.23%	7.98%	92.44%
7549	Automotive Services, Except Repair and Carwashes	19,111	40,637	54,181	2,803	6,740	7,856	7	6	7	112.64%	33.33%	183.51%	140.46%	16.56%	180.27%
76	Misc. Repair Services	318,982	341,108	403,351	48,021	64,134	67,418	7	5	6	6.94%	18.25%	26.45%	33.55%	5.12%	40.39%

SCREEN 2B: HISTORICAL GROWTH ANALYSIS OF NON-MANUFACTURING INDUSTRIES

SIC Code	Industry Description	Total Employment			Total Establishments			Average Number of Employees			% of Employment Growth			% of Establishment Growth		
		1980	1987	1990	1980	1987	1990	1980	1987	1990	1980-87	1987-90	1990-90	1980-87	1987-90	1990-90
762	Electrical Repair Shops	96,561	101,664	115,478	15,183	17,477	17,156	6	6	7	5.28%	13.59%	19.59%	15.11%	-1.84%	12.99%
763	Watch, Clock, and Jewelry Repair	6,096	5,921	5,294	1,447	1,675	1,529	4	4	3	-2.87%	-10.59%	-13.16%	15.76%	-8.72%	5.67%
764	Reupholstery and Furniture Repair	20,801	24,080	23,689	5,278	7,127	6,514	4	3	4	15.76%	-1.62%	13.88%	35.03%	-8.60%	23.42%
769	Misc. Repair Shops and Related Services	192,932	208,038	237,133	25,193	37,020	35,625	8	7	7	7.83%	13.99%	22.91%	46.95%	-3.77%	41.41%
7692	Welding Repair	27,736	26,173	27,923	3,901	5,995	5,278	7	4	5	-5.64%	6.69%	0.67%	53.68%	-11.96%	35.30%
7694	Armature Rewinding Shops	33,128	26,741	28,126	2,401	2,695	2,489	14	10	11	-19.28%	5.18%	-15.10%	12.24%	-7.64%	3.67%
7699	Repair Shops and Rhd. Serv., Not Elsewhere Class.	132,018	154,985	180,996	18,873	28,248	27,822	7	5	7	17.40%	16.78%	37.10%	49.67%	-1.51%	47.42%
78	Motion Pictures	207,755	258,616	429,843	14,941	18,854	26,444	14	14	16	24.48%	66.21%	106.90%	26.19%	40.26%	76.99%
781	Motion Picture Production and Allied Services	82,867	145,672	189,349	4,139	10,026	9,153	20	15	21	75.79%	29.98%	128.50%	142.23%	-8.71%	121.14%
782	Motion Picture and Video Tape Distribution	15,172	17,942	24,278	1,157	1,003	1,008	13	18	24	18.26%	35.31%	60.02%	-13.31%	0.50%	-12.88%
783	Motion Picture Theaters	109,192	94,434	106,995	9,467	7,584	6,967	12	12	15	-13.52%	13.80%	-2.01%	-19.89%	-8.14%	-26.41%
784	Video Tape Rental			102,673			16,442			6						
79	Amusement and Recreation Services	706,288	819,830	1,032,442	45,499	65,121	75,221	16	13	14	16.08%	25.93%	46.18%	43.13%	15.51%	65.32%
791	Dance Studios, Schools, and Halls	18,471	19,638	20,585	3,110	4,108	4,022	6	5	5	6.32%	4.82%	11.44%	32.09%	-2.09%	29.32%
792	Theat. Prod. (Excl. Mot. Picture), Bands, Orch.	94,081	102,279	126,048	5,893	9,408	9,701	16	11	13	6.45%	-23.24%	31.19%	59.65%	3.11%	64.62%
793	Bowling Centers	114,486	103,461	97,392	7,180	7,718	5,982	16	13	16	-9.63%	-5.87%	-14.93%	7.49%	-22.49%	-16.69%
794	Commercial Sports	60,120	75,468	78,923	2,130	3,324	3,264	28	23	24	25.53%	4.58%	31.28%	56.06%	-1.81%	53.24%
799	Misc. Amusement and Recreation Services	413,233	517,553	678,029	26,234	39,670	45,638	16	13	15	25.24%	31.01%	64.08%	51.22%	15.04%	73.97%
7991	Physical Fitness Facilities			115,024			7,723			15						
7992	Public Golf Courses	17,881	24,439	29,420	2,430	3,024	2,789	7	8	11	36.68%	20.38%	64.53%	24.44%	-7.77%	14.77%
7993	Coin-Operated Amusement Devices	15,620	26,394	25,158	2,381	4,398	3,932	7	6	6	68.98%	-4.68%	61.06%	84.71%	-10.60%	65.14%
7996	Amusement Parks	44,527	49,271	68,593	502	643	695	89	77	99	10.65%	39.22%	54.05%	28.09%	8.09%	38.45%
7997	R Membership Sports and Recreations Clubs	172,041	234,598	242,143	9,517	14,522	13,089	18	16	18	36.36%	3.22%	40.75%	52.59%	-9.87%	37.53%
7999	R Amuse. and Rec. Services, Not Elsewhere Classified	162,242	182,678	192,315	11,258	16,979	16,611	14	11	12	12.60%	5.28%	18.54%	50.82%	-2.17%	47.55%
80	Health Services	5,258,027	6,971,829	8,811,000	310,843	424,153	436,734	17	16	20	32.59%	26.38%	67.57%	36.45%	2.97%	40.50%
801	Offices and Clinics of Doctors of Medicine	741,855	1,051,744	1,367,189	147,247	191,156	193,620	5	6	7	41.77%	31.89%	86.99%	29.82%	1.29%	31.49%
802	Offices and Clinics of Dentists	350,827	487,420	533,248	85,691	103,888	104,654	4	5	5	38.93%	9.40%	52.00%	21.24%	0.74%	22.13%
803	Offices and Clinics of Doctors of Osteopathy	24,011	34,010	37,874	5,527	7,127	7,087	4	5	5	41.64%	11.36%	57.74%	28.95%	-0.56%	28.23%
804	Offices and Clinics of Other Health Practitioners	93,125	194,836	249,731	29,887	55,583	62,452	3	4	4	109.22%	28.17%	168.17%	85.96%	12.36%	108.96%
8041	Offices and Clinics of Chiropractors	22,131	57,360	73,020	8,861	20,101	22,899	2	3	3	159.18%	27.30%	229.94%	126.85%	13.92%	158.42%
8042	Offices and Clinics of Optometrists	37,836	58,002	62,604	12,498	16,015	15,320	3	4	4	53.30%	7.93%	65.46%	28.14%	-4.34%	22.58%
8043	Offices and Clinics of Podiatrists			24,863			7,132			3						
8049	R Off. and Clinics of Health Pract., Not Elsewhere Class.	33,142	77,328	81,978	8,519	19,325	14,968	4	4	5	133.32%	6.01%	147.35%	126.85%	-22.55%	75.70%
805	Nursing and Personal Care Facilities	1,002,037	1,303,561	1,460,784	12,801	17,384	19,096	78	75	76	30.09%	12.06%	45.78%	35.80%	9.85%	49.18%
806	Hospitals	2,672,700	3,100,359	4,325,257	5,261	5,953	6,327	508	521	684	16.00%	39.51%	61.83%	13.15%	6.28%	20.26%
807	Medical and Dental Laboratories	98,148	135,416	157,961	10,849	14,509	14,428	9	11	11	37.97%	16.65%	60.94%	33.74%	-0.56%	32.99%
808	Home Health Care Services	164,734	331,708	350,666	8,611	15,019	7,678	19	22	46	101.36%	5.72%	112.87%	74.42%	-48.88%	-10.83%
809	Misc. Health and All. Services, Not Elsewhere Class.	107,383	326,753	272,305	3,501	12,691	14,524	31	26	19	204.29%	-16.66%	153.58%	262.50%	14.44%	314.85%
81	Legal Services	503,474	818,013	931,807	97,335	139,780	142,436	5	6	7	62.47%	13.91%	85.08%	43.61%	1.90%	46.34%
82	Education Services	1,245,564	1,607,474	1,755,206	23,323	34,249	35,991	53	47	49	29.06%	9.19%	40.92%	46.85%	5.09%	54.32%
821	Elementary and Secondary Schools	302,747	429,652	451,326	11,332	14,785	14,339	27	29	31	41.92%	5.04%	49.08%	30.47%	-3.02%	26.54%
822	Coll., Univ., Prof. Schools, and Junior Colleges	819,625	1,006,623	1,082,042	2,433	3,062	2,973	337	309	364	22.77%	7.53%	32.02%	25.85%	-2.91%	22.19%
823	Libraries	12,893	17,284	13,791	1,315	1,754	1,643	10	10	8	34.06%	-20.21%	6.97%	33.38%	-6.33%	24.94%
824	Vocational Schools	46,656	71,212	96,922	2,753	4,205	4,575	17	17	21	52.63%	36.10%	107.74%	52.74%	8.80%	66.18%
829	Schools and Ed. Services, Not Elsewhere Classified	61,946	75,691	95,060	4,998	8,918	9,391	12	9	10	22.51%	25.26%	53.46%	78.43%	5.30%	87.90%
83	Social Services	1,023,841	1,475,246	1,750,179	60,561	104,193	115,645	17	14	15	44.09%	18.64%	70.94%	72.05%	10.99%	90.96%
831		809,398	1,131,810		50,613	85,354		13			39.83%			68.64%		
832	Individual and Family Social Services			408,398			27,580			15			90.45%			
833	Job Training and Vocational Rehabilitation Services			288,506			6,925			42						
835	Child Day Care Services			405,125			39,017			10						
836	Residential Care	214,443	342,569	406,831	9,948	18,630	20,967	18	19	19	59.75%	18.76%		87.27%	12.54%	110.77%
839	Social Services, Not Elsewhere Classified			200,087			13,710			15						
86	Membership Organizations	1,214,158	1,760,347	1,891,992	130,668	221,611	218,173	9	8	9	44.99%	7.48%	55.83%	69.60%	-1.55%	66.97%
861	Business Associations	78,575	92,687	98,504	11,097	12,187	12,677	7	8	8	17.96%	6.28%	25.36%	9.82%	4.02%	14.24%
862	Professional Membership Organization	39,778	48,341	55,579	4,524	5,432	5,480	9	10	10	21.53%	14.97%	39.72%	20.07%	0.88%	21.13%
863	Labor Unions and Similar Labor Organizations	171,815	175,421	176,220	20,753	21,262	19,246	8	8	9	2.10%	0.46%	2.56%	2.45%	-9.48%	-7.26%
864	Civil, Social, and Fraternal Associations	279,466	332,120	365,816	30,541	40,784	39,999	9	8	9	18.84%	10.15%	30.90%	33.54%	-1.92%	30.97%
865	Political Organization	6,287	5,698	8,369	1,147	1,264	1,653	5	5	5	9.37%	46.88%	33.12%	10.20%	30.78%	44.12%
866	Religious Organizations	573,087	1,012,691	1,096,313	55,998	130,572	128,765	10	8	9	76.71%	8.26%	91.30%	133.17%	-1.38%	129.95%
869	Membership Organization, Not Elsewhere Classified	65,130	91,519	87,666	6,598	9,728	9,670	10	9	9	40.52%	4.21%	34.60%	47.44%	-0.60%	46.56%
87	Eng., Account., Research, Manag., and Rhd. Serv.			2,472,932			201,146			12						135.15%
871	Engineering, Architectural, and Surveying Services			861,099			62,749			14						67.53%
8711	Engineering Services			651,646			33,089			20						1535.64%
8712	Architectural Services			139,557			15,742			9						61.39%
8713	Surveying Services			49,038			7,704			6						46.32%

SCREEN 2B: HISTORICAL GROWTH ANALYSIS OF NON-MANUFACTURING INDUSTRIES

SIC Code	Industry Description	Total Employment			Total Establishments			Average Number of Employees			% of Employment Growth			% of Establishment Growth		
		1980	1987	1990	1980	1987	1990	1980	1987	1990	1980-87	1987-90	1980-90	1980-87	1987-90	1980-90
872	Accounting, Auditing, and Bookkeeping Services			523,728			67,905			8						
873	Research, Development, and Testing Services			392,699			14,861			26						
874	Management and Public Relations Services			694,847			55,457			13						
89	Services, Not Elsewhere Classified	925,470	1,445,446		85,540	172,267				8	56.19%			101.39%		
891		523,539	736,487		37,456	62,152				12	40.67%			65.93%		
892		73,576	47,986		2,023	2,770				25	-7.60%			36.93%		
893		301,940	472,253		40,774	69,895				7	56.41%			71.42%		
899	Services, Not Elsewhere Classified	26,381	168,718		5,265	37,444				5	539.54%			611.19%		

R = Reclassified in 1987 Standard Industrial Classification Manual

Source: County Business Patterns and Leland Consulting Group.

## SCREEN 3: REGIONAL LOCATION QUOTIENT ANALYSIS

SIC Code	Industry Description	National	Montana	Montana Location Quotient	Idaho	Idaho Location Quotient	Utah	Utah Location Quotient	Colorado	Colorado Location Quotient	Washington	Washington Location Quotient	New Mexico	New Mexico Location Quotient	Oregon	Oregon Location Quotient	Arizona	Arizona Location Quotient	Regional Sum	Regional Location Quotient
		93,476,087	221,851		300,163		570,830		1,248,022		1,762,046		417,986		1,017,239		1,236,401		6,774,538	
205	Bakery Products	217,004	375	0.73	375	0.54	1,739	1.31	2,651	0.91	3,265	0.80	750	0.77	3,200	1.36	1,549	0.54	13,904	0.88
206	Sugar and Confectionery Products	91,327	375	1.73	750	2.54	604	1.09	938	0.77	806	0.47	234	0.57	375	0.38	104	0.09	4,190	0.43
2082	Malt Beverages	33,952	10	0.12	10	0.09	60	0.29	7,500	16.55	762	1.19		0.00	275	0.74	60	0.13	8,677	3.53
2083	Malt	1,381		0.00	60	13.53		0.00		0.00	175	6.72		0.00		0.00		0.00	235	2.35
2084	Wines, Brandy and Brandy Spirits	14,557		0.00	60	1.28		0.00	10	0.05	435	1.59	10	0.15	169	1.07	10	0.05	694	0.44
209	Misc. Food Preparations and Kindred Products	161,257	63	0.16	1,750	3.38	738	0.75	1,437	0.67	8,381	2.76	548	0.76	2,734	1.56	1,542	0.72	17,193	1.47
2095	Roasted Coffee	10,951		0.00		0.00		0.00	60	0.41	60	0.29		0.00	10	0.08	60	0.41	190	0.24
2096	Potato Chips, Corn Chips and Similar Snacks	31,652	10	0.13		0.00	375	1.94	383	0.91	750	1.26	175	1.24	375	1.09	215	0.51	2,283	1.00
221	Broadwoven Fabric Mill, Cotton	67,399		0.00		0.00	10	0.02	10	0.01	175	0.14		0.00	10	0.01	10	0.01	215	0.04
2252	Hosiery, Not Elsewhere Classified	38,453		0.00		0.00		0.00		0.00		0.00		0.00		0.00		0.00	0	0.00
2258	Lace and Warp Knit Fabric Mills	19,007		0.00		0.00		0.00		0.00		0.00		0.00		0.00	60	0.24	60	0.04
228	Yarn and Thread Mills	104,984	60	0.23		0.00		0.00	10	0.01		0.00		0.00	10	0.01	375	0.26	455	0.06
2281	Yarn Spinning Mills	85,052	60	0.30		0.00		0.00		0.00		0.00		0.00		0.00	375	0.33	435	0.07
2282	Yarn Text, Throwing, Twisting and Winding Mills	17,782		0.00		0.00		0.00	10	0.04		0.00		0.00	10	0.05		0.00	20	0.02
2297	Nonwoven Fabrics	14,887		0.00		0.00		0.00		0.00	175	0.62		0.00		0.00		0.00	175	0.16
2299	Textile Goods, Not Elsewhere Classified	17,152		0.00	10	0.18	60	0.57	60	0.26	60	0.19	10	0.13	60	0.32	10	0.04	270	0.22
2339	Women's, Misses', and Juniors' Out, Not Else. Class.	101,218	10	0.04	175	0.54	750	1.21	175	0.13	1,340	0.70		0.00	461	0.42	175	0.13	3,086	0.42
238	Misc. Apparel and Accessories	43,130	60	0.59	117	0.84	78	0.30	265	0.46	184	0.23	60	0.31	72	0.15	175	0.31	1,011	0.32
239	Misc. Fabricated Textile Products	21,538	469	9.16	147	2.13	1,438	10.93	1,291	4.49	2,871	7.07	60	0.62	1,012	4.32	1,747	6.13	9,035	5.79
2393	Textile Bags	10,402	175	7.09	60	1.80	492	7.75	91	0.66	163	0.83		0.00	375	3.31	60	0.44	1,416	1.88
2396	Auto, Trim, Apparel Findings, and Related Prod.	47,456	60	0.53	16	0.10	30	0.10	235	0.37	927	1.03	60	0.28	80	0.15	237	0.38	1,645	0.46
24	Lumber and Wood Products, Except Furniture	706,949	8,047	4.80	12,802	5.64	2,915	0.68	3,329	0.35	37,122	2.79	2,737	0.87	60,747	7.90	7,008	0.75	134,707	2.63
241	Logging	89,331	1,825	8.61	3,326	11.59	121	0.22	242	0.20	9,663	5.74	243	0.61	11,896	12.24	396	0.34	27,712	4.28
243	Millwork, Veneer, Plywood and Struct. Wd Memb.	224,030	1,553	2.75	2,781	3.64	1,809	1.24	1,617	0.51	10,339	2.30	768	0.72	23,189	8.95	3,428	1.09	45,484	2.44
2493	Reconstituted Wood Products	21,538	375	7.34	175	2.53		0.00	175	0.61	76	0.19	375	3.89	2,680	11.48	10	0.04	3,876	2.48
25	Furniture and Fixtures	510,423	226	0.19	624	0.38	2,615	0.84	3,750	0.55	4,030	0.42	685	0.30	3,554	0.64	3,304	0.49	18,790	0.51
252	Office Furniture	76,847		0.00	34	0.14	82	0.17	60	0.06	989	0.48		0.00	129	0.15	94	0.09	1,390	0.25
2542	Off. and Store Fixt., Part, Shelv., and Lock, Excp Wd	34,029		0.00		0.00	60	0.29	181	0.40	82	0.13		0.00	46	0.12	10	0.02	379	0.15
2633	Corrugated and Solid Fiber Boxes	109,874	60	0.23	375	1.06	296	0.44	1,015	0.69	1,562	0.75	60	0.12	714	0.60	489	0.34	4,571	0.57
2655	Fiber Cans, Tubes, Drums and Similar Products	13,178		0.00	10	0.24	60	0.75	60	0.34	175	0.70		0.00	10	0.07	10	0.06	325	0.34
2656	Sanitary Food Containers, Except Folding	15,471		0.00		0.00		0.00	10	0.05	175	0.59		0.00		0.00	60	0.29	245	0.22
2657	Folding Paperboard Boxes, Including Sanitary	50,399		0.00		0.00	250	0.81	454	0.67	643	0.68		0.00	254	0.46	60	0.09	1,661	0.45
267	Corr. Paper & Paperb. Prod., Excp Cont. and Boxes	232,323	10	0.02	750	1.01	1,433	1.01	1,750	0.56	3,075	0.70	60	0.06	2,178	0.86	677	0.22	9,933	0.59
27	Printing, Publishing and Allied Industries	1,551,645	2,800	0.76	4,496	0.90	9,729	0.97	22,940	1.11	22,015	0.75	3,996	0.57	15,440	0.92	16,030	0.78	96,906	0.86
272	Periodicals Publishing, or Publishing and Printing	116,125	175	0.63	332	0.89	183	0.26	1,404	0.91	693	0.32	193	0.37	457	0.36	450	0.29	3,887	0.46
2759	Commercial Printing, Not Elsewhere Classified	128,027	155	0.51	169	0.41	1,576	2.02	1,242	0.73	2,233	0.93	124	0.22	1,003	0.72	1,750	1.03	8,252	0.89
276	Manifold Business Forms	50,475		0.00	375	2.30	715	2.31	385	0.57	282	0.30	60	0.26	1,060	1.92	543	0.81	3,420	0.93
278	Blank, Loose, Bind., and Book Bind. and Bal. Work	68,271	60	0.37	60	0.27	443	1.06	948	1.06	481	0.37	161	0.53	715	0.96	613	0.90	3,701	0.75
28	Chemicals and Allied Products	864,307	499	0.24	3,916	1.41	2,819	0.53	3,750	0.32	11,889	0.73	1,672	0.43	2,954	0.31	4,573	0.40	32,072	0.51
281	Industrial Inorganic Chemicals	101,288	273	1.14	2,930	9.01	355	0.57	326	0.24	7,500	3.93	684	1.51	175	0.16	513	0.38	12,756	1.74
2835	In Vitro and In Vivo Diagnostic Substances	16,421		0.00		0.00	175	1.75	60	0.27	175	0.57		0.00	143	0.80	60	0.28	613	0.52
2836	Biological Products, Except Diagnostic Substances	14,446		0.00	10	0.22	60	0.68	175	0.91	375	1.38	60	0.93	60	0.38	60	0.31	800	0.76
286	Industrial Organic Chemicals	129,286	10	0.03		0.00	60	0.08	60	0.03	315	0.13	408	0.71	238	0.17	60	0.04	1,151	0.12
30	Rubber and Miscellaneous Plastics Products	882,821	102	0.05	485	0.17	2,366	0.44	7,571	0.64	7,296	0.44	612	0.16	5,538	0.58	5,467	0.47	29,437	0.44
305	Gask. Pack., & Seal. Dev., & Rub. and Plast. Hose	55,065		0.00	10	0.04	645	1.92	3,750	5.10	87	0.08	34	0.14	45	0.08	281	0.39	4,852	1.22
306	Fabricated Rubber Products, Not Elsewhere Classified	105,809		0.00	60	0.18	175	0.27	177	0.13	500	0.25		0.00	634	0.55	623	0.45	2,169	0.28
308	Misc. Plastics Products	636,896	60	0.04	419	0.20	1,487	0.38	3,750	0.44	6,633	0.55	578	0.20	4,730	0.68	4,495	0.53	22,152	0.48
321	Flat Glass	15,117		0.00		0.00	175	1.90		0.00	207	0.73		0.00	10	0.06		0.00	392	0.36
322	Glass and Glassware, Pressed or Blown	74,350		0.00	60	0.25	60	0.13	375	0.38	732	0.52	175	0.53	664	0.82	10	0.01	2,078	0.39
323	Glass Products, Made of Purchased Glass	55,347		0.00	95	0.53	32	0.09	371	0.50	1,184	1.13	50	0.20	379	0.83	394	0.54	2,505	0.62
324	Cement, Hydraulic	19,085	175	3.86	60	0.98	175	1.50	375	1.47	223	0.62	60	0.70	175	0.84	375	1.49	1,618	1.17
326	Pottery and Related Products	38,799	2	0.02	10	0.08	60	0.25	1,750	3.38	125	0.17	133	0.77	375	0.89	428	0.83	2,883	1.03
3275	Gypsum Products	11,784		0.00	60	1.59	175	2.43	175	1.11	396	1.78	175	3.32	17	0.13	175	1.12	1,173	1.37
332	Iron and Steel Foundries	135,853	175	0.54		0.00	825	0.99	545	0.30	1,370	0.53	10	0.02	3,422	2.31	750	0.42	7,097	0.72
3343	Aluminum Foundries	29,305		0.00		0.00	60	0.34	23	0.06	175	0.32	175	1.34	175	0.55	175	0.45	783	0.37
3344	Nonferrous Die-Castings, Except Aluminum	13,684	10	0.31		0.00	10	0.12	10	0.05	60	0.23		0.00	175	1.18	60	0.33	325	0.33
3365	Aluminum Foundries	24,519		0.00	60	0.76	60	0.40	68	0.21	438	0.95		0.00	60	0.22	79	0.24	765	0.43
3366	Copper Foundries	7,942	10	0.53		0.00	60	1.24	75	0.71	49	0.33	10	0.28	114	1.32	93	0.89	411	0.71
34	Fab. Metal Products, Excp Mach. and Trans. Equip.	1,483,334	552	0.16	2,249	0.47	7,466	0.82	16,926	0.85	13,903	0.50	740	0.11	11,569	0.72	9,433	0.48	62,838	0.58
342	Cutlery, Handtools, and General Hardware	143,043	60	0.18	60	0.13	64	0.07	2,307	1.21	1,164	0.43	10	0.02	1,948	1.25	130	0.07	5,743	0.55
344	Fabricated Structural Metal Products	415,377	315	0.32	984	0.74	3,583	1.41	3,446	0.62	6,796	0.87	405	0.22	4,693	1.04	5,108	0.93	25,332	0.84
3446	Architectural Design and Ornamental Metal Work	77,727	10	0.15	10	0.11	264	1.59	210	0.58	412	0.80	20	0.16	173	0.58	834	2.32	1,933	0.98
3449	Miscellaneous Structural Metal Work	22,091	10	0.19		0.00	393	2.91	271	0.92	429	1.03	10	0.10	182	0.76	378	1.29	1,673	1.04
3452	Bolts, Nuts, Screws, Rivets, and Washers	52,725		0.00		0.00	175	0.54	60	0.09	98	0.10	10	0.04	10</					

## SCREEN 5: REGIONAL LOCATION QUOTIENT ANALYSIS

SIC Code	Industry Description	National	Montana Location Quotient	Idaho Location Quotient	Utah Location Quotient	Colorado Location Quotient	Washington Location Quotient	New Mexico Location Quotient	Oregon Location Quotient	Arizona Location Quotient	Regional Sum	Regional Location Quotient								
3547	Rolling Mill Machinery and Equipment	3,994	0.00	0.00	0.00	10	0.19	10	0.13	0.00	10	0.23	0.00	30	0.10					
3548	Electric and Gas Welding and Soldering Equipment	19,262	0.00	0.00	0.00	60	0.23	60	0.17	10	0.12	10	0.05	140	0.10					
355	Special Ind. Machinery, Exclpt Metalworking Mach.	177,775	10	0.02	175	0.31	230	0.21	1,197	0.50	3,300	0.98	60	0.08	2,799	1.45	1,724	0.52	8,995	0.70
3553	Woodworking Machinery	10,044	10	0.42	60	1.86	10	0.16	0.00	543	2.86	1,437	13.12	175	1.31	2,235	3.06			
3554	Paper Industries Machinery	19,486	0.00	0.00	10	0.08	75	0.29	874	2.38	10	0.11	368	1.74	0.00	1,337	0.95			
3556	Food Products Machinery	20,355	0.00	60	0.92	60	0.48	375	1.38	321	0.84	0.00	261	1.18	60	0.72	1,137	0.77		
3559	Special Industry Machinery, Not Elsewhere Classified	85,433	0.00	41	0.15	175	0.34	568	0.50	1,261	0.78	60	0.16	592	0.64	971	0.86	3,668	0.59	
3571	Electronic Computers	126,003	60	0.20	175	0.43	1,750	2.27	3,750	2.23	134	0.06	750	1.33	1,521	1.11	2,293	1.38	10,433	1.14
3572	Computer Storage Devices	41,707	0.00	1,750	13.07	750	2.94	11,477	20.61	60	0.08	0.00	375	0.83	10	0.02	14,422	4.77		
3575	Computer Terminals	13,500	0.00	0.00	10	0.12	175	0.97	60	0.24	0.00	1,750	11.91	375	2.10	2,370	2.42			
3577	Computer Peripheral Equip., Not Elec. Class.	78,141	0.00	1,750	6.97	1,750	3.67	750	0.72	3,772	2.54	60	0.17	613	0.72	622	0.60	9,317	1.65	
3578	Calcul. and Account. Machines, Exclpt Elect. Computers	9,437	0.00	0.00	0.00	0.00	0.00	175	0.98	0.00	0.00	750	7.30	60	0.48	985	1.44			
3579	Office Machines, Not Elsewhere Classified	28,265	0.00	0.00	10	0.06	375	0.99	60	0.11	10	0.08	60	0.20	175	0.47	690	0.34		
3585	Air-Cond. & Warm Air Heat and Comm. & Ind. Refrig.	131,229	0.00	60	0.14	175	0.22	375	0.21	662	0.27	60	0.10	175	0.12	1,902	1.10	3,409	0.34	
3646	Comm., Ind., and Instit. Electric Light Fixtures	22,607	0.00	10	0.14	0.00	60	0.20	750	1.76	0.00	0.00	10	0.03	630	0.51				
3647	Vehicular Lighting Equipment	15,584	0.00	0.00	0.00	0.00	10	0.03	0.00	10	0.06	10	0.00	60	0.29	80	0.07			
3648	Lighting Equipment, Not Elsewhere Classified	16,421	0.00	10	0.19	60	0.60	10	0.05	60	0.19	0.00	0.00	60	0.28	200	0.17			
3651	Household Audio and Video Equipment	33,673	0.00	0.00	60	0.29	16	0.04	773	1.22	60	0.40	60	0.16	375	0.84	1,344	0.55		
3661	Telephone and Telegraph Apparatus	93,952	0.00	0.00	60	0.10	1,750	1.40	708	0.40	1,750	4.17	914	0.89	336	0.27	5,518	0.81		
3663	Radio and Television Broad. and Comm. Equip.	129,184	0.00	0.00	1,410	1.79	2,092	1.21	696	0.29	375	0.45	1,028	0.73	7,500	4.39	13,101	1.40		
3669	Communications Equipment, Not Elsewhere Classified	24,152	0.00	175	2.26	0.00	175	0.54	317	0.70	10	0.09	699	2.66	60	0.19	1,436	0.82		
367	Electronic Components and Accessories	547,967	224	0.17	7,500	4.26	4,116	1.23	7,480	1.02	6,442	0.64	3,022	1.23	7,378	1.24	27,157	3.75	63,599	1.60
3671	Electron Tubes	31,277	0.00	375	3.73	0.00	57	0.14	10	0.02	0.00	175	0.51	987	2.39	1,604	0.71			
3672	Printed Circuit Boards	69,382	0.00	10	0.04	509	1.20	970	1.05	624	0.48	175	0.56	1,108	1.47	2,291	2.50	5,687	1.13	
3678	Electronic Connectors	38,127	0.00	0.00	0.00	60	0.12	60	0.08	0.00	0.00	750	1.49	870	0.31					
369	Misc. Electrical Machinery, Equipment, and Supplies	185,499	60	0.14	10	0.02	611	0.54	1,618	0.65	1,080	0.31	375	0.45	1,304	0.65	1,117	0.46	6,175	0.46
3692	Primary Batteries, Dry and Wet	11,077	0.00	0.00	10	0.15	175	1.18	10	0.05	0.00	10	0.08	0.00	205	0.26				
3695	Magnetic and Optical Recording Media	25,417	0.00	0.00	175	1.13	571	1.68	60	0.13	0.00	10	0.04	750	2.23	1,564	0.85			
3699	Elect. Mach., Equip., and Supplies, Not Elec. Class.	63,394	60	0.40	10	0.05	275	0.71	452	0.53	867	0.73	169	0.60	874	1.27	354	0.42	3,063	0.67
37	Transportation Equipment	1,797,524	282	0.07	1,208	0.30	14,734	1.34	17,500	0.73	115,272	3.40	4,156	0.52	10,203	0.52	31,271	1.32	195,128	1.50
371	Motor Vehicles and Motor Vehicle Equipment	707,160	146	0.09	338	0.15	1,669	0.39	2,071	0.22	1,750	0.13	1,750	0.55	3,918	0.51	2,320	0.25	13,962	0.27
3714	Motor Vehicle Parts and Accessories	385,958	10	0.01	60	0.05	842	0.34	1,300	0.25	731	0.10	59	0.03	1,502	0.36	1,808	0.35	6,312	0.23
372	Aircraft and Parts	624,341	8	0.01	175	0.09	1,750	0.44	1,384	0.17	75,000	6.37	1,750	0.63	1,750	0.26	20,486	2.50	102,505	2.27
3724	Aircraft Engines and Engine Parts	133,407	10	0.03	0.00	0.00	10	0.01	658	0.26	1,750	2.93	16	0.01	7,500	4.24	9,944	1.03		
3728	Air. Parts and Aux. Equip., Not Elsewhere Classified	190,116	10	0.02	60	0.10	1,750	1.51	1,750	0.69	19,492	5.44	60	0.07	1,750	0.85	4,523	1.80	29,395	2.13
376	Guided Missiles and Space Vehicles and Parts	201,073	0.00	0.00	17,500	14.25	17,500	6.52	17,500	4.62	175	0.10	0.00	7,500	2.82	60,175	4.13			
3761	Guided Missiles and Space Vehicles	156,988	0.00	0.00	10	0.01	17,500	8.35	17,500	5.91	175	0.25	0.00	7,500	3.41	42,685	3.75			
3764	Guid. Missile and Space Veh. Prop. Units and Prop. Unit	34,033	0.00	0.00	17,500	84.20	10	0.02	375	0.58	0.00	0.00	10	0.02	17,895	7.26				
38	Mass., Analyt., and Control Instr.; Photo, Med., and Of	945,916	151	0.07	625	0.20	7,792	1.32	22,291	1.73	13,935	0.77	4,781	1.11	13,546	1.29	13,041	1.02	76,162	1.09
381	Sech. Det., Nav., Guid., Aero., and Naut. Systems, Instru	317,926	10	0.01	375	0.37	3,750	1.93	5,337	1.26	345	0.06	3,750	2.64	1,619	0.47	8,370	1.99	23,556	1.02
382	Lab. App. and Analyt., Opt., Mass., and Control. Instru.	289,930	10	0.01	60	0.04	483	0.27	7,656	1.98	8,577	1.57	750	0.58	8,875	2.81	3,103	0.81	29,514	1.40
3821	Laboratory Apparatus and Furniture	18,650	0.00	0.00	60	0.53	175	0.70	0.00	10	0.12	238	1.17	10	0.04	493	0.34			
3824	Totalizing Fluid Meters and Counting Devices	13,734	107	3.28	0.00	10	0.12	375	2.04	60	0.23	0.00	175	1.17	60	0.33	787	0.79		
3826	Laboratory Analytical Instruments	36,970	0.00	0.00	130	0.58	1,121	2.27	188	0.27	60	0.36	358	0.89	212	0.43	2,069	0.77		
3827	Optical Instruments and Lenses	23,435	0.00	0.00	10	0.07	375	1.20	0.00	175	1.67	750	2.94	107	0.35	1,417	0.83			
384	Surgical, Medical, and Dental Instruments and Supplies	229,404	107	0.20	144	0.20	4,370	3.12	7,500	2.45	4,287	0.99	770	0.75	2,200	0.88	1,368	0.45	20,746	1.25
3841	Surgical and Medical Instruments and Apparatus	85,959	0.00	60	0.22	2,545	4.85	2,847	2.48	546	0.34	175	0.46	349	0.37	175	0.15	6,697	1.08	
385	Ophthalmic Goods	31,944	10	0.13	0.00	175	0.90	150	0.35	182	0.30	375	2.62	63	0.18	87	0.21	1,042	0.45	
386	Photographic Equipment and Supplies	84,425	60	0.30	0.00	60	0.12	3,750	3.33	388	0.24	60	0.16	776	0.84	77	0.07	5,171	0.85	
39	Misc. Manufacturing Industries	394,154	1,067	1.14	540	0.44	5,037	2.09	4,103	0.78	6,439	0.89	2,358	1.34	4,310	1.00	4,033	0.77	28,107	0.98
3996	Lino., Asph.-Felt Base, and Other Hld Surf. Fr. Cov., Not	6,953	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1,695	54.52	0.00	0.00	0.00	0.00	1,695	3.36			
45	Transport By Air	674,058	895	0.54	1,250	0.58	7,210	1.75	18,738	2.08	17,467	1.37	1,698	0.56	5,300	0.72	19,754	2.22	72,309	1.48
46	Pipelines, Except Natural Gas	15,310	44	1.21	0.00	60	0.64	60	0.29	10	0.03	134	1.99	10	0.06	19	0.09	339	0.31	
461	Pipelines, Except Natural Gas	15,193	44	1.22	0.00	60	0.65	60	0.30	10	0.03	134	2.00	10	0.06	119	0.59	439	0.40	
47	Transportation Services	370,094	579	0.64	741	0.62	2,086	0.92	4,785	0.97	9,824	1.41	1,008	0.61	4,292	1.07	4,034	0.82	27,349	1.02
478	Misc. Services Incident To Transportation	33,929	7	0.09	95	0.87	85	0.41	413	0.91	754	1.18	51	0.34	309	0.84	232	0.52	1,948	0.79
49	Electric, Gas, and Sanitary Services	871,335	4,127	2.00	3,092	1.11	6,585	1.24	12,821	1.10	9,062	0.55	7,415	1.95	9,927	1.05	13,977	1.21	67,206	1.06
495	Sanitary Services	109,885	175	0.67	235	0.67	479	0.71	1,750	1.19	2,086	1.01	892	1.82	1,183	0.99	750	0.52	7,550	0.95
496	Steam and Air Conditioning Supply	2,641	26	4.12	0.00	10	0.62	0.00	60	1.20	0.00	0.00	0.00	0.00	0.00	10	0.28	106	0.55	
504	Professional and Commercial Equipment and Supplies	743,390	1,113	0.63	1,193	0.50	4,392	0.97	12,480	1.26	12,542	0.90	2,724	0.82	7,293	0.90	11,545	1.18	53,302	0.99
5044	Office Equipment	196,197	252	0.54	379	0.60	1,018	0.85	3,262	1.25	3,349	0.91	771	0.88	2,049	0.96	2,434	0.94	13,514	0.95
5045	Computers and Computer Peripheral Equipment and Sc	288,723	487	0.71	398	0.43	1,698	0.96	5,335	1.38	5,154	0.95	1,198	0.93	2,381	0.76	6,291	1.65	22,942	1.10
5046	Commercial Equipment, Not Elsewhere Classified	52,073	60	0.49	192	1.15	414	1.30	441	0.63	959	0.98	131	0.56	793	1.40	880	1.28	3,870	1.03
5047	Medical, Dental, and Hospital	109,464	112	0.43	126	0.34	872	1.30	1,755	1.20	1,743	0.84	347	0.71	1,154	0.97	1,221	0.84	7,330	0.92
5048	Ophthalmic Goods	27,998	60	0.90	10	0.11	98	0.57	360	0.96	307	0.58	67	0.54	435	1.43	240	0.65	1,577	0.78
5049	Professional Equipment and Supplies, Not Elsewhere Cl	34,498	126	1.53	60	0.54	93	0.44	897	1.94	550	0.84	180	1.16	350	0.93	224	0.49	2,480	0.99
509	Misc. Durable Goods	292,774	403	0.58	445	0.71	2,													

SCREEN 5: REGIONAL LOCATION QUOTIENT ANALYSIS

SIC Code	Industry Description	National	Montana	Montana Location Quotient	Idaho	Idaho Location Quotient	Utah	Utah Location Quotient	Colorado	Colorado Location Quotient	Washington	Washington Location Quotient	New Mexico	New Mexico Location Quotient	Oregon	Oregon Location Quotient	Arizona	Arizona Location Quotient	Regional Sum	Regional Location Quotient
60	Depository Institutions	2,032,758	5,097	1.06	5,307	0.81	9,505	0.77	25,318	0.93	35,211	0.92	9,346	1.03	20,367	0.92	21,558	0.80	131,709	0.89
601	Central Reserve Depository Institutions	30,513	175	2.42		0.00	175	0.94	750	1.84	375	0.65		0.00	175	0.53	750	1.86	2,400	1.09
602	Commercial Banks	1,472,204	4,124	1.18	4,498	0.95	6,513	0.72	17,134	0.87	23,615	0.85	7,401	1.12	15,336	0.96	15,643	0.80	94,264	0.88
603	Savings Institutions	416,571	637	0.64	590	0.44	1,994	0.78	4,809	0.86	8,679	1.11	1,515	0.81	4,113	0.91	3,857	0.70	26,196	0.87
606	Credit Unions	50,642	149	1.24	201	1.24	761	2.44	1,750	2.59	1,761	1.84	392	1.73	594	1.08	971	1.45	6,579	1.79
608	Foreign Banking and Branches and Agencies of Foreign	13,317		0.00		0.00		0.00		0.00	60	0.24		0.00	60	0.41		0.00	120	0.12
609	Functions Related to Depository Banking	43,937	60	0.58	18	0.13	60	0.22	1,559	2.64	558	0.67	18	0.09	175	0.37	375	0.65	2,823	0.89
611	Federal and Federally-Sponsored Credit Agencies	13,529	10	0.31	10	0.23	60	0.73	152	0.84	375	1.47	150	2.48	10	0.07	10	0.06	777	0.79
615	Business Credit Institutions	87,608	197	0.95	175	0.62	338	0.63	1,865	1.59	1,046	0.63	303	0.77	1,167	1.22	3,750	3.24	8,841	1.39
62	Sec. and Comm. Brokers, Dealers, Exch., and Services	410,826	490	0.50	375	0.28	1,015	0.40	6,914	1.26	4,358	0.56	708	0.39	2,308	0.52	2,848	0.53	19,036	0.64
621	Security Brokers, Dealers, and Floation Companies	308,078	440	0.60	365	0.37	821	0.44	5,341	1.30	3,598	0.62	616	0.45	1,825	0.54	2,457	0.60	15,463	0.69
623	Security and Commodity Exchanges	9,149		0.00		0.00	10	0.18	10	0.08	10	0.06		0.00		0.00	10	0.08	40	0.04
628	Services Allied With the Exchange of Securities or Comm	75,740	27	0.15	60	0.25	163	0.35	1,426	1.41	678	0.47	78	0.23	437	0.53	368	0.37	3,237	0.59
63	Insurance Carriers	1,406,594	1,709	0.51	2,845	0.43	5,013	0.58	18,331	0.98	23,364	0.88	2,963	0.47	15,369	1.00	13,985	0.75	83,579	0.82
6324	Hospital and Medical Service Plans	139,255	750	2.27	750	1.64	750	0.88	1,750	0.94	2,952	1.12	750	1.20	2,441	1.61	1,750	0.95	11,893	1.18
633	Fire, Marine, and Casualty Insurance	532,536	245	0.19	1,149	0.67	1,289	0.40	7,214	1.01	9,287	0.93	733	0.31	7,005	1.21	6,609	0.94	33,531	0.87
635	Surety Insurance	14,629	10	0.29		0.00	28	0.31	329	1.68	268	0.97	60	0.92	60	0.38	114	0.59	869	0.82
64	Insurance Agents, Brokers, and Service	712,305	2,128	1.26	1,852	0.81	3,622	0.83	8,471	0.89	12,484	0.93	3,143	0.99	7,610	0.98	10,895	1.16	50,205	0.97
671	Holding Offices	123,470	311	1.06	347	0.93	451	0.60	2,118	1.28	1,890	0.81	395	0.72	681	0.51	1,787	1.09	8,000	0.89
735	Misc. Equipment Rental and Leasing	209,088	353	0.71	389	0.58	1,629	1.28	2,986	1.07	3,928	1.00	1,393	1.49	2,498	1.06	3,403	1.23	16,490	1.09
736	Personal Supply Services	1,517,893	791	0.22	1,776	0.36	14,450	1.56	18,070	0.89	21,369	0.75	6,559	0.97	15,302	0.93	25,377	1.26	103,694	0.94
737	Com. Program, Data Process, and Other Comp. Rild Ser	772,736	471	0.26	835	0.34	7,212	1.53	15,258	1.48	13,013	0.89	1,742	0.50	7,771	0.92	6,645	0.65	52,947	0.95
7371	Computer Programming Services	217,239	77	0.15	108	0.15	1,800	1.12	4,864	1.68	3,181	0.78	657	0.68	1,271	0.54	1,651	0.57	13,301	0.84
7373	Computer Insurance Systems Design	81,584	60	0.31	58	0.22	723	1.45	1,598	1.47	1,985	1.29	174	0.48	2,520	2.84	1,051	0.97	8,171	1.38
7375	Information Retrieval Services	16,654		0.00		0.00	40	0.39	404	1.82	22	0.07	10	0.13	136	0.75	234	1.06	846	0.70
7376	Computer Facilities Management Services	24,310	56	0.97	60	0.77	10	0.07	175	0.54	1,750	3.82	60	0.55	141	0.53	60	0.19	2,312	1.31
7377	Computer Rental and Leasing	15,216		0.00	60	1.23	175	1.88	174	0.86	123	0.43	14	0.21	46	0.28	397	1.97	989	0.90
7378	Computer Maintenance and Repair	53,249	59	0.47	41	0.24	487	1.50	632	0.89	594	0.59	124	0.52	217	0.37	401	0.57	2,555	0.66
738	Misc. Business Service	1,092,785	1,194	0.44	1,508	0.43	8,981	1.35	15,775	1.08	14,611	0.71	3,728	0.76	10,118	0.85	19,324	1.34	75,299	0.95
7381	Detective, Guard, and Armored Car Services	467,331	340	0.31	459	0.31	1,648	0.58	5,338	0.84	5,257	0.60	2,478	1.19	4,722	0.93	6,805	1.10	27,047	0.80
7382	Security Systems Services	48,898	21	0.18	60	0.38	175	0.59	1,213	1.86	584	0.64	85	0.39	425	0.80	709	1.10	3,274	0.92
7383	News Syndicates	10,034	41	1.72	10	0.31	10	0.16	108	0.81	68	0.36	60	1.34	60	0.55	47	0.35	404	0.54
7384	Photofinishing Laboratories	76,038	145	0.80	144	0.60	450	0.97	976	0.96	1,791	1.25	309	0.91	949	1.15	909	0.90	5,675	1.03
7389	Business Services, Not Elsewhere Classified	489,578	647	0.56	839	0.53	6,751	2.26	8,140	1.25	6,884	0.75	830	0.38	3,971	0.75	10,835	1.67	38,897	1.10
7532	Top, Body, and Upholstery Repair Shops and Paint Shop	163,625	557	1.43	576	1.10	1,146	1.15	2,243	1.03	3,745	1.21	769	1.05	2,205	1.24	2,171	1.00	13,412	1.13
7533	Automotive Exhaust System Repair Shops	21,772	64	1.24	71	1.02	184	1.40	237	0.82	424	1.03	77	0.79	206	0.87	261	0.91	1,526	0.97
7536	Automotive Glass Replacement Shops	20,120	38	0.80	138	2.14	245	1.99	489	1.82	658	1.73	114	1.27	207	0.95	492	1.85	2,381	1.63
7537	Automotive Transmission Repair Shops	23,802	57	1.01	102	1.33	208	1.43	312	0.98	546	1.22	193	1.81	333	1.29	510	1.62	2,261	1.31
754	Automotive Services, Except Repair	145,073	378	1.10	599	1.29	967	1.09	2,253	1.16	2,944	1.08	987	1.52	1,927	1.22	3,821	1.99	13,876	1.32
7549	Automotive Services, Except Repair and Carwashes	54,181	123	0.96	223	1.28	428	1.29	970	1.34	1,710	1.67	388	1.60	891	1.51	1,181	1.65	5,914	1.51
78	Motion Pictures	429,843	918	0.90	900	0.65	2,140	0.82	3,346	0.59	5,740	0.71	1,552	0.81	3,165	0.68	3,731	0.64	21,512	0.69
784	Video Tape Rental	102,473	385	1.58	371	1.13	633	1.01	1,084	0.79	2,734	1.15	605	1.32	1,312	1.17	1,344	0.99	7,968	1.07
79	Amusement and Recreation Services	1,032,442	3,976	1.62	3,624	1.09	6,430	1.05	24,076	1.75	23,735	1.22	5,575	1.21	11,414	1.02	17,169	1.26	96,199	1.29
799	Misc. Amusement and Recreation Services	678,029	2,957	1.84	2,368	1.09	4,923	1.19	19,242	2.13	16,025	1.25	3,823	1.26	7,985	1.08	10,618	1.18	67,941	1.38
7991	Physical Fitness Facilities	115,024	490	1.79	475	1.29	968	1.41	2,909	1.89	3,764	1.74	456	0.89	1,359	1.09	1,644	1.08	12,085	1.45
804	Offices and Clinics of Doctors of Medicine	249,731	852	1.44	1,039	1.30	1,485	0.97	4,321	1.30	5,784	1.23	1,483	1.33	3,259	1.20	4,144	1.25	22,367	1.24
8041	Offices and Clinics of Chiropractors	73,020	231	1.33	354	1.52	367	0.82	1,441	1.48	1,890	1.37	401	1.23	1,345	1.72	1,564	1.62	7,617	1.44
832	Individual and Family Social Services	408,398	1,479	1.53	1,054	0.80	1,228	0.49	3,901	0.72	11,135	1.45	2,034	1.11	4,941	1.11	6,321	1.17	32,093	1.08
833	Job Training and Vocational, Rehabilitation Services	288,506	1,717	2.51	1,287	1.39	1,112	0.63	3,380	0.88	5,910	1.09	1,485	1.15	5,080	1.62	3,648	0.96	23,639	1.13
835	Child Day Care Services	405,125	905	0.94	1,178	0.91	2,355	0.95	6,137	1.13	9,587	1.26	1,953	1.08	4,090	0.93	5,959	1.11	32,164	1.10
836	Residential Care	404,831	1,547	1.60	1,393	1.07	2,047	0.82	4,925	0.91	8,388	1.09	1,947	1.07	8,127	1.84	5,894	1.10	34,268	1.16
839	Social Services, Not Elsewhere Classified	200,087	595	1.25	499	0.78	469	0.38	1,885	0.71	3,371	0.89	1,457	1.43	2,099	0.96	1,866	0.71	12,241	0.84
865	Political Organization	8,349	49	2.47	31	1.15	33	0.65	131	1.17	134	0.86	39	1.04	118	1.30	401	3.62	938	1.55
87	Eng., Account, Research, Mgmt, and Related Science	2,472,932	3,911	0.67	12,096	1.52	12,282	0.81	39,913	1.21	45,437	0.97	22,156	2.00	18,818	0.70	32,947	1.01	187,560	1.05
871	Engineering, Agricultural, and Surveying Services	861,099	1,303	0.64	2,111	0.76	5,371	1.02	15,113	1.31	17,418	1.07	6,118	1.59	7,041	0.75	10,574	0.93	45,049	1.04
8711	Engineering Services	651,646	879	0.57	1,510	0.72	4,362	1.10	11,850	1.36	11,764	0.96	4,843	1.44	4,805	0.68	7,480	0.87	47,495	1.01
8712	Architectural Services	139,557	260	0.78	310	0.69	643	0.78	2,140	1.15	4,050	1.54	763	1.22	1,608	1.06	2,400	1.30	12,194	1.21
8713	Surveying Services	49,038	115	0.99	210	1.33	134	0.45	782	1.19	1,200	1.30	419	1.91	444	0.83	481	0.74	3,787	1.07
872	Accounting, Auditing, and Bookkeeping Services	523,728	1,347	1.08	1,750	1.04	2,560	0.80	6,841	0.98	9,379	0.95	2,057	0.88	5,483	0.96	7,553	1.09	36,970	0.97
873	Research, Development, and Testing Services	392,499	714	0.77	7,500	5.95	1,889	0.79	8,743	1.67	9,872	1.33	2,707	1.54	2,729	0.64	4,049	0.78	38,203	1.34
874	Management and Public Relations Services	694,847	626	0.38	2,686	1.20	2,456	0.58	9,197	0.99	6,722	0.67	11,274	3.63	3,562	0.47	10,748	1.17	49,291	0.98

SCREEN 4: NUMBER OF MILLION DOLLAR COMPANIES BY INDUSTRY

SIC Code	Industry Description	No. of \$1 Million Companies
2082	Malt Beverages	32
2083	Malt	13
209	Misc. Food Preparation and Kindred Products	698
2096	Potato Chips, Corn Chips, and Similar Snacks	67
239	Misc. Fabricated Textile Products	572
2393	Textile Bags	51
2394	Canvas and Related Products	59
24	Lumber and Wood Products, Excpt Furniture	2580
241	Logging	168
243	Millwork, Veneer, Plywood and Structural Members	655
2493	Reconstituted Wood Products	65
281	Industrial Inorganic Chemicals	446
305	Gaskets, Packing and Sealing Devices	216
324	Cement, Hydraulic	58
326	Pottery and Related Products	89
3275	Gypsum Products	136
3449	Misc. Structural Metal Work	95
348	Ordnance and Accessories, Excpt Vehicles	106
3553	Woodworking Machinery	52
3571	Electronic Computers	287
3572	Computer Storage Devices	136
3575	Computer Terminals	102
3577	Computer Peripheral Equipment	309
3578	Calculating and Accounting Machines	31
3663	Radio and Television Broadcasting Equipment	358
367	Electronic Components and Accessories	1475
3672	Printed Circuit Boards	273
37	Transportation Equipment	2556
372	Aircraft and Parts	587
3724	Aircraft Engines and Engine Parts	155
3728	Aircraft Parts and Auxiliary Equipment	373
376	Guided Missiles and Space Vehicles and Parts	101
3761	Guided Missiles and Space Vehicles	25
3764	Guided Missiles and Space Vehicle Propulsion Units	30
38	Measuring, Analyzing and Controlling Instruments	2671
381	Search, Detection, Navigation and Guidance Equip.	269
382	Laboratory Apparatus and Analytical Instruments	1569
384	Surgical, Medical and Dental Instruments	1030
3841	Surgical and Medical Instruments and Apparatus	421
3996	Linoleum, Asphalted-Felt-Base Floor Coverings	7
45	Transportation by Air	368

SIC Code	Industry Description	No. of \$1 Million Companies
47	Transportation Services	784
49	Electric, Gas and Sanitary Services	3223
5045	Computers and Computer Peripheral Equipmer	956
5046	Commercial Equipment, Not Elsewhere Class.	385
509	Misc. Durable Goods	2109
601	Central Reserve Depository Institutions	15
606	Credit Unions	1
615	Business Credit Institutions	1150
6324	Hospital and Medical Service Plans	304
735	Misc. Equipment Rental and Leasing	2436
7373	Computer Integrated Systems Design	550
7376	Computer Facilities Management Services	50
7384	Photofinishing Laboratories	113
7389	Business Services, Not Elsewhere Classified	1394
7532	Top, Body and Upholstery Repair Shops	228
7536	Automotive Glass Replacement Shops	37
7537	Automotive Transmission Repair Shops	18
754	Automotive Services, Except Repair	264
7549	Automotive Services, Except Repair and Carwasl	129
784	Video Tape Rental	100
79	Amusement and Recreation Services	1476
799	Misc. Amusement and Recreation Services	122
7991	Physical Fitness Facilities	29
804	Offices and Clinics of Other Health Practitioners	14
8041	Offices and Clinics of Chiropractors	0
832	Individual and Family Social Services	14
833	Job Training and Vocational Rehab. Services	29
835	Child Day Care Services	22
836	Residential Care	11
86	Membership Organizations	48
865	Political Organizations	0
87	Eng., Account., Research and Manage. Services	4983
8711	Engineering Services	1920
8712	Architectural Services	448
8713	Surveying Services	150
873	Research, Development and Testing Services	1914

Source: Dun & Bradstreet Million Directory and Leland Consulting Group.

SCREEN 5: STATE OF MONTANA PROJECTED EMPLOYMENT GROWTH BY INDUSTRY

SIC Code	Industry	1990	1997	% Change	Annual % Change
100	Agricultural Production, Crops	612	620	1.31%	0.19%
200	Agricultural Production, Livestock	1481	1630	10.06%	1.44%
700	Agricultural Services	1024	1126	9.96%	1.42%
800	Forestry	316	348	10.13%	1.45%
<b>Subtotal</b>	<b>Agriculture, Forestry and Fishing</b>	<b>3433</b>	<b>3724</b>	<b>8.48%</b>	<b>1.21%</b>
1000	Metal Mining	2635	2730	3.61%	0.52%
1200	Coal Mining	1120	1359	21.34%	3.05%
1300	Oil and Gas Extraction	1698	1803	6.18%	0.88%
1400	Nonmetallic Minerals, Except Fuels	826	981	18.77%	2.68%
<b>Subtotal</b>	<b>Mining</b>	<b>6279</b>	<b>6873</b>	<b>9.46%</b>	<b>1.35%</b>
1500	General Building Contractors	2855	3293	15.34%	2.19%
1600	General Contractors, Exc Building	2734	4068	48.79%	6.97%
1700	Special Trade Contractors	4777	5013	4.94%	0.71%
<b>Subtotal</b>	<b>Construction</b>	<b>10366</b>	<b>12374</b>	<b>19.37%</b>	<b>2.77%</b>
2400	Lumber and Wood Products	8205	7380	-10.05%	-1.44%
2500	Furniture and Fixtures	316	359	13.61%	1.94%
3200	Stone, Clay and Glass	1031	1031	0.00%	0.00%
3300	Primary Metal Products	1127	883	-21.65%	-3.09%
3400	Fabricated Metal Products	507	440	-13.21%	-1.89%
3500	Industrial Machinery and Equipment	793	700	-11.73%	-1.68%
3600	Electronic & Other Electrical Equipment	306	323	5.56%	0.79%
3700	Transportation Equipment	313	241	-23.00%	-3.29%
3800	Instruments and Related Products	285	371	30.18%	4.31%
3900	Misc. Manufacturing industries	1022	1022	0.00%	0.00%
<b>Subtotal</b>	<b>Durable Goods Manufacturing</b>	<b>13905</b>	<b>12750</b>	<b>-8.31%</b>	<b>-1.19%</b>
2000	Food & Kindred Products	2547	2447	-3.93%	-0.56%
2300	Apparel and Textile Products	747	805	7.76%	1.11%
2600	Paper & Allied Products	812	800	-1.48%	-0.21%
2700	Printing & Publishing	2709	3006	10.96%	1.57%
2800	Chemicals & Allied Products	621	752	21.10%	3.01%
2900	Petroleum and Coal Products	781	639	-18.18%	-2.60%
3000	Rubber & Misc. Plastics Products	74	128	72.97%	10.42%
<b>Subtotal</b>	<b>Nondurable Goods Manufacturing</b>	<b>8291</b>	<b>8577</b>	<b>3.45%</b>	<b>0.49%</b>
4000	Railroad Transportation	3600	3369	-6.42%	-0.92%
4100	Local and Interurban Transit	1180	1339	13.47%	1.92%
4200	Trucking and Warehousing	5846	6453	10.38%	1.48%
4500	Transportation by Air	1058	1238	17.01%	2.43%
4600	Pipe Lines, Except Natural Gas	85	85	0.00%	0.00%
4700	Transportation Services	635	777	22.36%	3.19%
<b>Subtotal</b>	<b>Transportation</b>	<b>12404</b>	<b>13261</b>	<b>6.91%</b>	<b>0.99%</b>
4800	Communications	3452	3400	-1.51%	-0.22%
4900	Utilities and Sanitary Services	4343	4932	13.56%	1.94%
<b>Subtotal</b>	<b>Communications and Utilities</b>	<b>7795</b>	<b>8332</b>	<b>6.89%</b>	<b>0.98%</b>
5000	Wholesale Trade, Durable Goods	7999	8550	6.89%	0.98%



SCREEN 5: STATE OF MONTANA PROJECTED EMPLOYMENT GROWTH BY INDUSTRY

SIC Code	Industry	1990	1997	% Change	Annual % Change
5100	Wholesale Trade, Nondurable Goods	7731	8270	6.97%	1.00%
<b>Subtotal</b>	<b>Wholesale Trade</b>	<b>15730</b>	<b>16820</b>	<b>6.93%</b>	<b>0.99%</b>
5200	Bldg. Materials & Garden Supplies	2856	3142	10.01%	1.43%
5300	General Merchandise Stores	6474	7154	10.50%	1.50%
5400	Food Stores	9687	10417	7.54%	1.08%
5500	Auto Dealers & Service Stations	8579	8851	3.17%	0.45%
5600	Apparel and Accessories Stores	2391	2560	7.07%	1.01%
5700	Furniture & Homefurnishing Stores	2445	2739	12.02%	1.72%
5800	Eating and Drinking Places	23423	25759	9.97%	1.42%
5900	Miscellaneous Retail Stores	6779	7694	13.50%	1.93%
<b>Subtotal</b>	<b>Retail Trade</b>	<b>62634</b>	<b>68316</b>	<b>9.07%</b>	<b>1.30%</b>
6000	Depository Institutions	5545	6124	10.44%	1.49%
6100	Nondepository Institutions	447	480	7.38%	1.05%
6200	Security & Commodity Brokers	592	676	14.19%	2.03%
6300	Insurance Carriers	1380	1593	15.43%	2.20%
6400	Insurance Agents, Brokers & Services	1987	2269	14.19%	2.03%
6500	Real Estate	2514	2860	13.76%	1.97%
6700	Holding & Other Investment Offices	617	667	8.10%	1.16%
<b>Subtotal</b>	<b>Finance, Insurance and Real Estate</b>	<b>13082</b>	<b>14669</b>	<b>12.13%</b>	<b>1.73%</b>
7000	Hotels & Other Lodging Places	7205	8214	14.00%	2.00%
7200	Personal Services	2657	2757	3.76%	0.54%
7300	Business Services	6682	7654	14.55%	2.08%
7500	Auto Repair Service and Parking	2605	3004	15.32%	2.19%
7600	Misc. Repair Services	1228	1319	7.41%	1.06%
7800	Motion Pictures	1131	1289	13.97%	2.00%
7900	Amusement & Recreation Services	3776	4124	9.22%	1.32%
8000	Health Services, Incl. State & Local Govt.	27010	31743	17.52%	2.50%
8100	Legal Services	2187	2362	8.00%	1.14%
8200	Education Services, Inc. State & Local	30815	33842	9.82%	1.40%
8300	Social Services	6390	7709	20.64%	2.95%
8400	Museums, Botanical, Zoological Garden	144	165	14.58%	2.08%
8600	Membership Organizations	4563	4763	4.38%	0.63%
8700	Engineering & Management Services	4748	5080	6.99%	1.00%
8900	Miscellaneous Services	140	140	0.00%	0.00%
<b>Subtotal</b>	<b>Services</b>	<b>101281</b>	<b>114165</b>	<b>12.72%</b>	<b>1.82%</b>
9100	Federal Government	13600	13879	2.05%	0.29%
9200	State Government, Ex. Education & Hospital	10186	10390	2.00%	0.29%
9300	Local Government, Ex. Education & Hospital	12950	13207	1.98%	0.28%
<b>Subtotal</b>	<b>Government</b>	<b>36736</b>	<b>37476</b>	<b>2.01%</b>	<b>0.29%</b>
<b>Total</b>		<b>291936</b>	<b>317337</b>	<b>8.70%</b>	<b>1.24%</b>

Source: Montana Department of Labor & Industry and Leland Consulting Group.

## SCREEN 6: FINALIST INDUSTRIES

SIC Code	Industry Description
2083	Malt
209	Misc. Food Preparation and Kindred Products
239	Misc. Fabricated Textile Products
2393	Textile Bags
2394	Canvas and Related Products
24	Lumber and Wood Products, Excpt Furniture
243	Millwork, Veneer, Plywood and Structural Members
281	Industrial Inorganic Chemicals
324	Cement, Hydraulic
3553	Woodworking Machinery
3572	Computer Storage Devices
3577	Computer Peripheral Equipment
367	Electronic Components and Accessories
37	Transportation Equipment
38	Measuring, Analyzing and Controlling Instruments
384	Surgical, Medical and Dental Instruments
3841	Surgical and Medical Instruments and Apparatus
615	Business Credit Institutions
7376	Computer Facilities Management Services
79	Amusement and Recreation Services
8331	Job Training and Vocational Rehab. Services
86	Membership Organizations
873	Research, Development and Testing Services

Source: Leland Consulting Group.

SCREEN 7A: TARGET MARKETS

Number of Establishments by State

SIC Code	Industry Description	California	Colorado	Pennsylvania	Virginia	Michigan	Minnesota	North Carolina	Illinois	Washington	Texas
2083	Malt	1	0	0	0	2	9	0	1	1	0
209	Misc. Food Preparation and Kindred Products	534	54	134	98	84	69	92	149	179	287
239	Misc. Fabricated Textile Products	1,085	107	291	125	159	121	293	225	177	378
2393	Textile Bags	30	4	12	4	6	4	12	12	10	15
2394	Canvas and Related Products	135	22	55	19	45	22	25	38	45	53
24	Lumber and Wood Products, Excpt Furniture	2,819	302	1,475	1,180	1,007	590	1,794	628	1,861	1,176
243	Millwork, Veneer, Plywood and Structural Members	1,227	139	339	206	191	159	276	229	271	386
281	Industrial Inorganic Chemicals	132	21	91	25	30	8	37	63	35	130
324	Cement, Hydraulic	20	4	20	7	12	5	1	9	9	18
3553 (*)	Woodworking Machinery	31	0	13	4	12	5	23	14	13	12
3572	Computer Storage Devices	51	11	3	0	0	11	0	2	1	5
3577	Computer Peripheral Equipment	203	17	22	11	12	14	12	14	29	38
367	Electronic Components and Accessories	1,859	138	267	79	130	154	113	323	99	353
37	Transportation Equipment	1,652	112	339	176	648	145	249	327	427	621
38	Measuring, Analyzing and Controlling Instruments	1,997	230	529	132	314	277	181	507	224	550
384	Surgical, Medical and Dental Instruments	635	75	178	34	89	126	85	172	71	164
3841	Surgical and Medical Instruments and Apparatus	251	31	51	9	23	50	18	49	28	46
615	Business Credit Institutions	561	87	101	59	96	79	61	217	66	271
7376	Computer Facilities Management Services	94	5	24	43	19	11	8	26	9	49
79	Amusement and Recreation Services	8,844	1,316	3,417	1,678	2,548	1,538	2,015	3,052	1,629	3,988
8331 (**)	Job Training and Vocational Rehab. Services	916	129	338	151	226	223	157	337	224	296
86	Membership Organizations	16,224	2,899	13,657	6,019	7,722	5,559	7,320	10,211	4,540	13,399
873	Research, Development and Testing Services	2,359	340	680	462	375	249	261	665	309	945

(\*\*) Concentration in Sonoma County, California.

(\*) Used SIC Code 833.

Source: Leland Consulting Group.

SCREEN 7B: TARGET MARKETS WITHIN CALIFORNIA

SIC Code	Industry Description	Number of Establishments by California County			
		Los Angeles County	Orange County	San Francisco County	Santa Clara County
209	Misc. Food Preparation and Kindred Products	186	40	37	17
239	Misc. Fabricated Textile Products	471	140	46	27
2393	Textile Bags	11	0	0	0
2394	Canvas and Related Products	30	20	0	0
24	Lumber and Wood Products, Excpt Furniture	541	189	50	91
243	Millwork, Veneer, Plywood and Structural Members	275	108	33	54
281	Industrial Inorganic Chemicals	40	4	0	6
324	Cement, Hydraulic	0	0	0	3
3553	Woodworking Machinery	0	0	0	0
3572	Computer Storage Devices	9	5	0	23
3577	Computer Peripheral Equipment	29	39	0	62
367	Electronic Components and Accessories	400	299	37	493
37	Transportation Equipment	634	209	25	35
38	Measuring, Analyzing and Controlling Instruments	521	303	31	301
384	Surgical, Medical and Dental Instruments	158	114	9	56
3841	Surgical and Medical Instruments and Apparatus	46	56	4	28
615	Business Credit Institutions	166	93	45	18
7376	Computer Facilities Management Services	28	14	0	6
79	Amusement and Recreation Services	3,739	529	331	333
8331 (*)	Job Training and Vocational Rehab. Services	228	71	51	58
86	Membership Organizations	4,140	1,120	773	685
873	Research, Development and Testing Services	632	242	132	274

(\*) Used SIC Code 833.

Source: Leland Consulting Group.

# Missoula Airport Development Park Master Plan and Strategic Implementation Plan

## LAND USE PROGRAM

Land Use Category	Data	Functions and Uses	Examples	Requirements
Signature Office/Retail	10 Acres (2%)	Office/commercial (.25 FAR)	Office: Single or multi-story (2-4 floors) office building -speculative or build-to-suit (up to 100,000 GSF at .25 FAR)  Potential users could be local businesses, support businesses for other Park users from the Target Industry List (i.e. consulting, entrepreneurs, business credit).	High visibility site with good access; Parking at (3/1000 GSF); Could generate on-site demand for other categories of uses, such as retail, and warehouse/distribution.
		Retail/commercial (.2 FAR) to serve Park needs and some off-site demand.	Retail: Freestanding pad(s) or retail inside building.	Retail: High visibility and access from high traffic street. Parking at (5/1000 GSF).
Retail Center	8 Acres (2%)	Retail/commercial (see above)	One story multi-tenant retail center, (up to 70,000 GSF at .2 FAR).	Retail (see above)
Office/Hotel	15 Acres (3%)	Office (see above)	Office (see above)	Office (see above)
		Hotel/motel with retail on site (in primary building or a separate pad site).	Full service hotel with restaurant and conference facilities (3-4 stories) (i.e. La Quinta, Holiday Inn, Clarion), possibly with a restaurant pad (i.e. Red Robin, Village Inn).	High visibility and easy access from freeway; Serve local demand related to freeway, hotel, Park and city; Restaurant within walking distance; Parking at (1/room plus other uses).

<b>Land Use Category</b>	<b>Data</b>	<b>Functions and Uses</b>	<b>Examples</b>	<b>Requirements</b>
<b>Office/Research and Development (R&amp;D)</b>	32 Acres (7%)	Office (see above)  Research, product development, testing, assembly and distribution activities result in need for laboratories, research and administration offices, servicing, assembly, and storage.	Office (see above)  Flexible space or build-to-suit buildings with front door image and service access (1-2 stories). Users could include R&D (i.e. NURTURE), engineering and consulting testing labs, computer-related, medical/precision instruments, other high-tech and manufacturing related to above.	Office (see above)  Flexible space or build-to-suit for a wide variety of activities; Specialized tenant finish required.  Could generate demand for other on-site uses, such as light industrial, warehouse/distribution and retail.
<b>University-Affiliated Business and Technology Park</b>	43 Acres (10%)	Office, R&D, Light Industrial and support uses on a centrally managed site, with a university-related marketing theme.	Other university-affiliated business and research parks (i.e. University of Colorado, Northeastern, Research Triangle, Stanford).	Functional and parking requirements specific to each type of anticipated use; Unified management and marketing is important.
<b>Technical Training Center</b>	14 Acres (3%)	Technical training and support uses to serve public and private clients; Accommodate special programs in conjunction with vocational schools and private businesses; Could complement job training, manufacturing and research activities on the site.	Single or multi-building campus (classrooms, offices, shops, meeting rooms and support uses), such as US West Training Center (Denver), community college or vo-tech facilities.	Institutional support to provide training programs (i.e. community college, vocational school or corporate).
<b>Research and Development (R&amp;D)</b>	40 Acres (9%)	R&D (see above)	R&D (see above)	R&D (see above)
<b>Light Industrial</b>	71 Acres (17%)	Light manufacturing and assembly and other "clean" industries; Strong link to on-site R&D facilities; Can co-locate with offices, warehouses and research facilities, because all these activities are low impact and otherwise "clean".	"Manufacturing" activities described on Target Industry List, provided that they are "clean" operationally (i.e. value-added wood products, computer equipment, transportation equipment, precision instruments, NURTURE).	Employee amenities are important; Some users prefer to locate in proximity to R&D facilities; Need access to airport and road transportation because products tend to be smaller and lighter; Rail access is less important; May require warehouse/distribution facilities and retail or result in increased demand for these facilities.

Land Use Category	Data	Functions and Uses	Examples	Requirements
Industrial/Warehouse	56 Acres (13%)	Industrial: Manufacturing, involving processing of raw materials; Can generate impacts (smoke, noise, traffic) that need to be mitigated.	Industrial: "Heavy manufacturing" and some "manufacturing" activities on Target Industry List. (i.e. lumber and wood products, machinery, Rosco Steel).	Industrial: Careful site planning and land use controls can minimize impacts; Rail and freeway access are important because products tend to be large and heavy.
		Warehouse: Warehouse and distribution facilities for local and regional markets. Potential demand for facilities for Target Industry List users in other categories.	Warehouse: Large high-ceiling 1-story buildings with 2 story offices in front, and loading docks on one side. Low employee/building area ratio.	Warehouse: Careful site planning is critical to offset appearance and truck traffic; Some users prefer to co-locate with related R&D facilities; Require large, level sites with freeway and possibly rail access.
Reserve Areas	82 Acres (17%)	Reserved for future undetermined uses.	N/A	Coordinate with future major road construction and utilities.
Parks, Trails and Open Space	34 Acres (8%)	Passive and active recreational uses.	Community parks, ballfields, sports facilities, hiker/biker trails, enhanced drainage/open space systems, buffer landscaped areas.	Could serve community-at-large and/or be part of an employee amenity package for Park users; Development and/or maintenance costs needs to be assigned.
Street Rights-of-Way	41 Acres (9%)	Vehicular circulation and utilities.	Major streets (Access Road and Spine Road) developed initially with interchange.	Major streets 80' to 150' r.o.w. Minor streets 50' to 80' r.o.w.
			Minor streets (local loop streets and cul-de-sacs) phased as development occurs.	Some minor streets might be private.
Totals	446 Acres (100%)			

## SECTION V:

# AIRPORT DEVELOPMENT PARK MASTER PLAN

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### INTRODUCTION

The purpose of this section is to present the analysis, findings and preliminary concepts underlying the Airport Development Park Proposed Master Plan which is presented at the conclusion of this section. Planning activities which are summarized here include a physical analysis of the site and surrounding conditions, descriptions of Concept Team Alternatives, comparative evaluation of the Concept Team Alternatives, description of the Development Concept for the site, pre-liminary Land Use Program, and the Proposed Master Plan, which includes graphics and narrative.

### SITE ANALYSIS

Following is a summary of basic issues relative to the existing and proposed conditions of the Development Park site. These are summarized graphically on the Site Analysis map, which follows.

#### Location

The Missoula Airport Development Park site is located in the Missoula Valley of the Clark Fork of the Missouri River in western Montana, just northwest of the City of Missoula and within Missoula County. The site comprises 446 acres and is generally linear - 2,000 to 2,400 feet in width and approximately two miles in length.

The northeast side of the site adjoins Interstate-90 and the southwest side adjoins the Montana Rail Link railroad tracks, which are contiguous and parallel with West Broadway, which also lies to the southwest. Please refer to the Location Map in Section I: Introduction.

#### Existing Development

To the northeast and across the interstate, the site is bordered on one long side by low density (five acre lots) residential development. On the southwest side and across West Broadway is the Missoula International Airport, which includes the U.S. Forest Service Aerial Fire Depot and aviation-related private development. To the southeast, the site adjoins industrial development and a mobile home park. Land to the northwest is currently undeveloped and in agriculture use.

The site owned by Missoula County and is largely undeveloped and in agricultural use. NURTURE, Inc., a manufacturer of formulation additives, owns a 23 acre parcel



in the park on which it recently constructed a new facility, and also holds options on several other parcels in the park.

The adjacent Momont Industrial Park is surrounded by the 446 acres and fronts the railroad right-of-way. It is developed with streets and utilities and includes buildings by several tenants. Adjacent development parcels which are also bordered with the site by surrounding roads include the Gooden Homestead on the northeast side, accessible by an unimproved road across the site to West Broadway, and Desmet School, to the northwest and accessible by a road from Butler Creek Road.

### Topography and Drainage

The topography of the site varies. It slopes gently (3%) from the interstate embankment to the railroad tracks on the southwest side. From the northwest corner of the site to the southeast corner of the site the total fall is 30 feet, which is an average slope of approximately .3%.

There are several naturally-occurring drainages which run across the site, from east to west. In addition to site-generated drainage, they are fed by a conduit which runs under Interstate-90 in the vicinity of the Gooden Homestead. Surface water exits the site by way of swales parallel with the railroad and a conduit under West Broadway in the vicinity of the U.S. Forest Service Aerial Fire Depot, which drains onto the airport property. The on-site surface drainage basins can be identified by existing contours in the agriculture fields, although the primary drainage basin in the central portion of the site includes mature stands of cottonwood trees.

### Access and Transportation

The site can currently be accessed from three sides. Butler Creek Road is an improved county road with a signal and at-grade crossing to West Broadway, and provides access to Desmet School. West Broadway is currently a two-lane facility and provides access by way of Momont Road, an improved county road directly opposite the airport entrance, as well as several at-grade crossings on unimproved roads from West Broadway. Unimproved roads also link the southeast side of the site to Reserve Street. Currently there is not access from the long northeast side, which borders Interstate-90.

Current plans call for developing a full diamond interchange on Interstate-90 near the northeastern side of the site, with an Crossroad across the site between the planned interchange and West Broadway. This facility is planned with a grade-separated crossing at the railroad. In addition, an expressway is planned to run the length of the site (parallel to Interstate-90 and West Broadway) with at-grade intersections at Butler Creek Road and Reserve Street.

When these facilities are complete, plans call for closing most at-grade crossings along the Montana Rail link tracks, including Momont Road. For the near term, the Butler Creek rail crossing will remain open, although eventually it may have to be improved.





## UTILITIES

Currently, Momont Industrial Park and the Missoula Airport are served with utilities which have the potential of being extended to other portions of the Development Park site. Future studies need to address the physical feasibility, cost, phasing and financing of future extensions, as well as provide master plans for the coordination of utilities with the Development Park Proposed Master Plan.

In addition, future development needs to provide for the placing underground of existing and future overhead utilities, wherever feasible, in order to improve the overall appearance and achieve the intent of the Proposed Master Plan. The following narrative summarizes existing utility conditions on the site and within the surrounding area.

### Water and Fire Protection

Mountain Water Company provides water from a well to the Momont Industrial Park using a system that was originally designed to serve only this development and constructed in 1980. This system does not meet current fire protection guidelines.

Additional development would require significant upgrades to provide adequate fire protection and meet other applicable standards. Studies are currently underway which will address the existing and future water service requirements in the context of development on-site and in the surrounding area (which includes residential development, the airport and the U.S. Forest Service Aerial Fire Depot). These studies are considering an additional well, expanded storage tanks and other system improvements.

Fire Protection for the site is provided by the Missoula Rural Fire District which has a facility about half a mile to the north on West Broadway. The City of Missoula provides fire protection to the Missoula Airport.

### Sanitary Sewer

Existing users in both phases of Momont Industrial Park are served by a sanitary sewer system, which was constructed through Rural Special Improvement Districts (RSID #369 and #382) in 1980 and 1981, and included water and street improvements. These districts included extensions to the trunk sewer system between Momont and the Grant Creek Center lift station which is located off-site in the direction of Reserve Street. All effluent is treated by the City of Missoula Treatment Facility, located on the Clark Fork to the southeast which is at a higher elevation.

Most of the adjacent development in the unincorporated County utilizes individual or community septic tanks and drain fields for waste disposal. Such systems would be inappropriate for the Development Park because of the size of the proposed development. Annexation or waiver of protest rights on future annexation is required by the City of Missoula to connect to the city's sewer system.

Two lift stations and a force main are located on-site, and the main runs parallel to the railroad tracks. This main system receives the gravity flows from Momont. As-built drawings for these improvements are on file with the City of Missoula Public Works Department. Future utility investigations should evaluate the feasibility of expanding this system to accommodate the proposed industrial development of the remaining acreage in the Development Park.

#### **Storm Drainage**

The Momont Industrial Park disposes of storm drainage through a series of underground sumps. The preferred method for a project on the scale of the Development Park would be a system which combines surface conveyance, site and/or regional detention areas and underground conduits.

#### **Electrical**

Electrical service in the area is currently provided by two private electrical utilities, Montana Power and Missoula Electrical Cooperative, Inc. Missoula Power owns a transmission line that runs the length of the site and serves existing users such as Missoula Airport, NURTURE, Inc., Rosco Steel and other users in the Momont Industrial Park. Missoula Electrical Corporation owns a 7.2/12.5 kV transmission the length of the site from the southeast corner to Butler Creek Road. This utility currently serves the Gooden-Keil residential area, the Gooden Homestead and Desmet School.

Future extensions of electrical service onto the site will need to address the allocation of service areas between the two utilities according to the Territorial Integrity Act of 1971 (House Bill 5) and provide for the removal of some existing overhead utility lines, particularly those in conflict with the development plan.

#### **Gas**

Montana Power provides piped natural gas to the site as well as current users in Momont Industrial Park from a high pressure line parallel to and south of Interstate-90.

#### **Telecommunications**

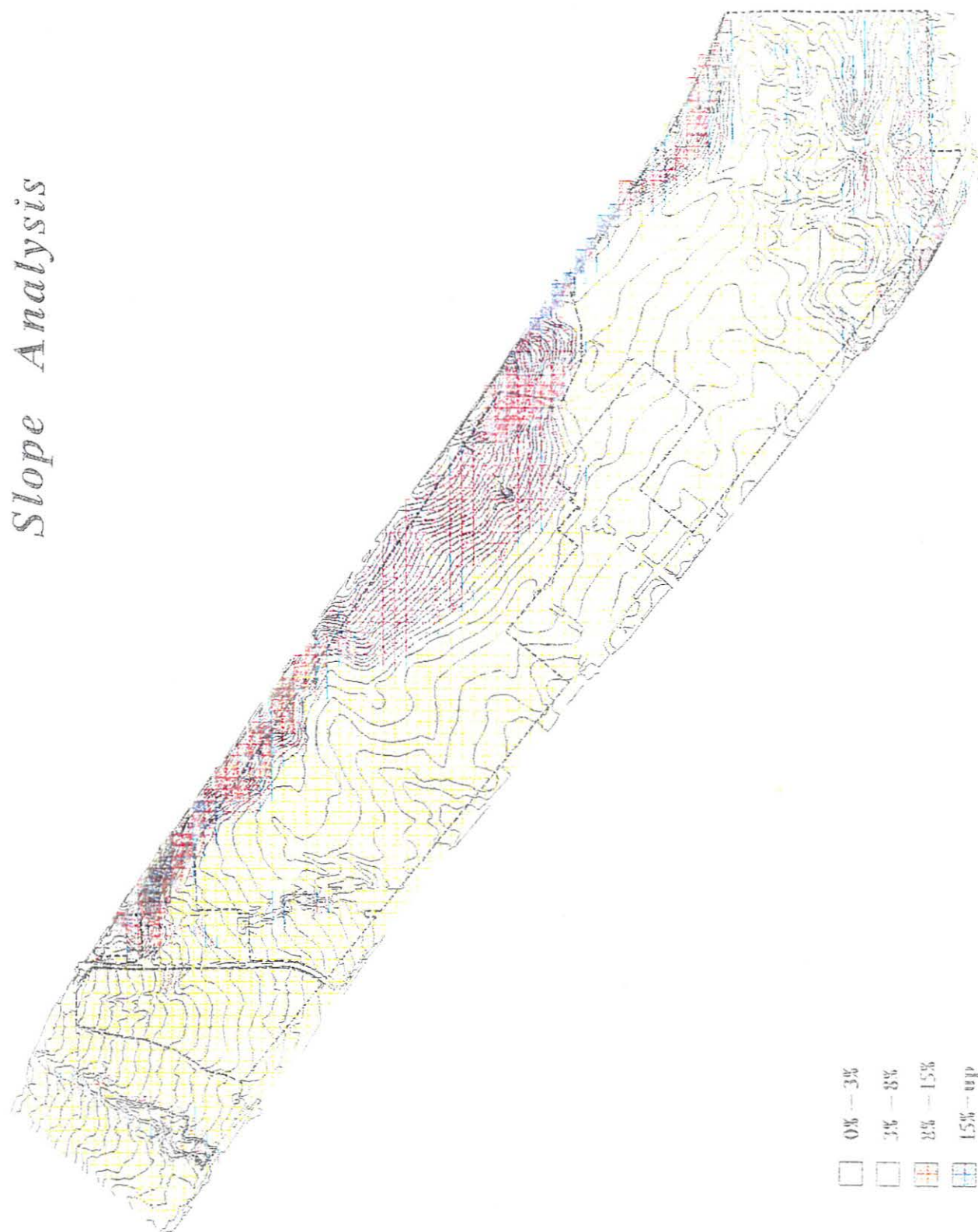
US West provides telephone and telecommunications service to the site, as part of its regulated service area. Plans are currently underway to extend fiber-optic cable along the south side of West Broadway, with crossovers to the site. US Sprint also has a fiber-optic cable in place south of the railroad tracks.

#### **CONCEPT TEAM ALTERNATIVES**

This portion of the report summarizes the work of the Concept Teams, which took place between October 1993 and early January 1994. The Concept Teams met in three workshops which were facilitated by the consultant team, which were followed by a presentation of their concepts to the Development Planning Committee.



# Slope Analysis



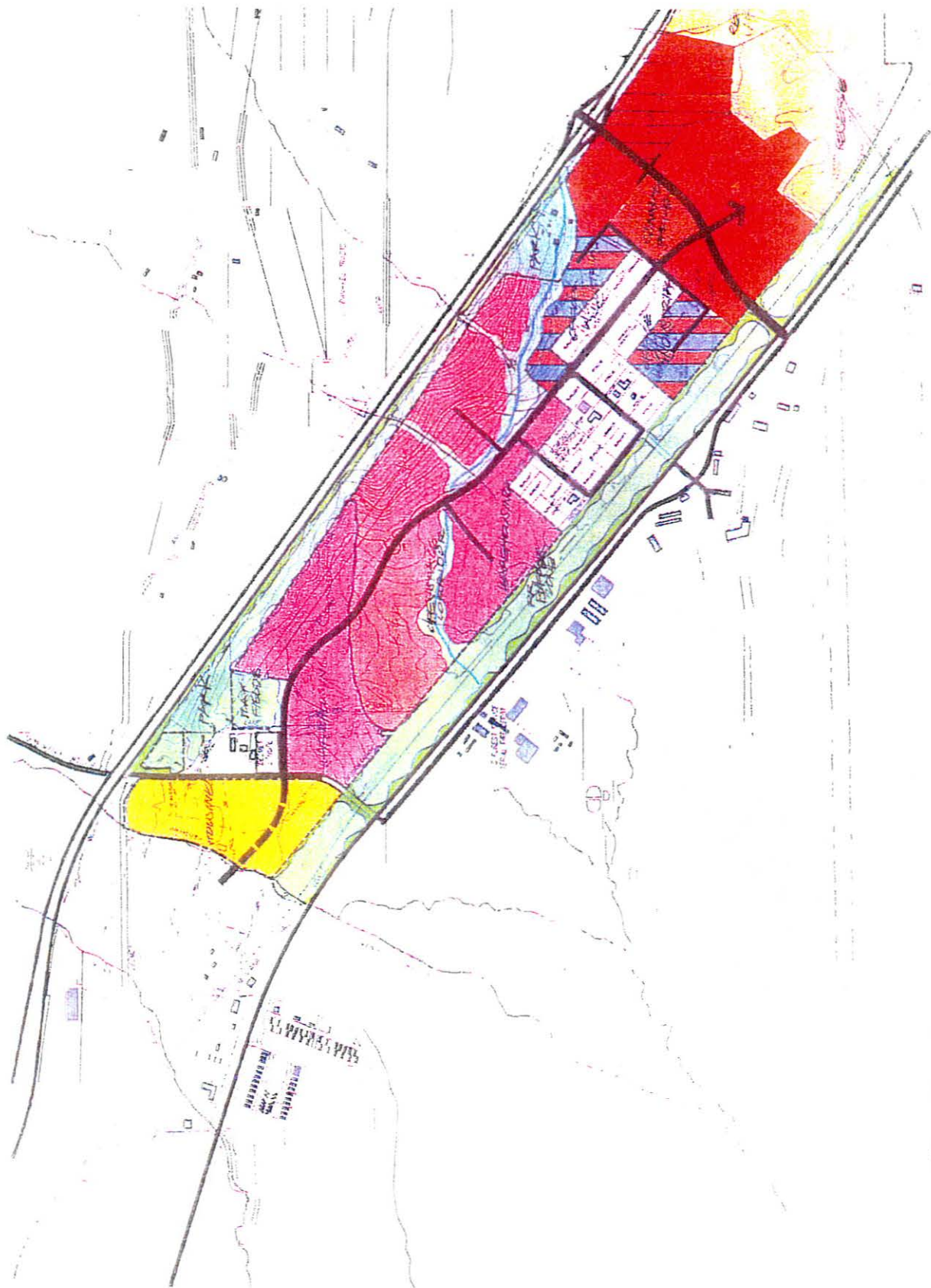
## Missoula Airport Development Park

Missoula, Montana

HOH Associates • Leland Consulting • Druyvestein Johnson & Anderson







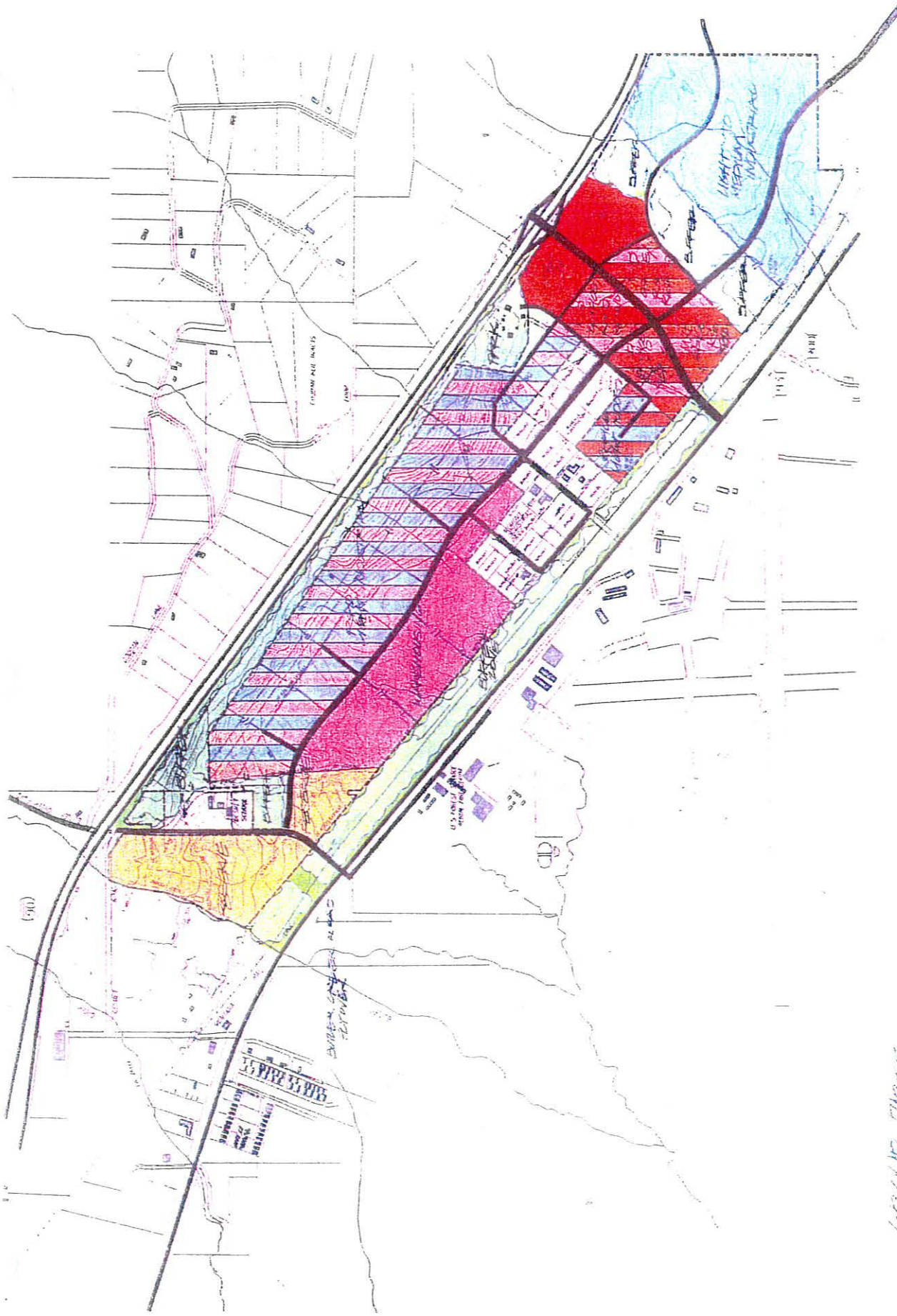
RED TWC

MISSOULA RIVER  
MIXED USE DEVELOPMENT  
REVISED 5-23-75

# Missoula Airport Development Park

Missoula, Montana

HOH Associates - Leif Consulting Group - Druyvestein Johnson & Anderson



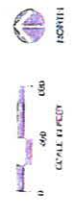
LOCAL 17000  
 UNIVERSITY PARK  
 AND RESEARCH CENTER  
 10-11-73  
 11-14-73

# Missoula Airport Development Park

Missoula, Montana

HOLL Associates - Leland Consulting Group - Drurystein Johnson & Anderson

CONTOUR LINE ELEVATION  
 CHECK ON INTERIOR LINE ELEVATION





The purpose of this effort was to identify community concerns and develop preliminary concepts for the Airport Development Park which directly reflected the attitudes and ideas of Missoula residents. The concepts were also intended to assist the Development Planning Committee and consultant team in formulating concepts and strategies for the site, and served as a starting point for the Proposed Master Plan.

Documentation includes a project theme statement, description of key features, summary of land use data and a reduced plan graphic which illustrates the concept. More detailed descriptions of the alternatives are included in the Appendix. These summaries are followed by a comparative evaluation of the Concept Team Alternatives which identifies potential elements to be considered for incorporation into the Proposed Master Plan.

#### TEAM 1: "BUSINESS AND RECREATION PARK"

##### Theme:

"A Business Park with a Touch of Recreation and a Lot of Class"

##### Description:

Concept Team 1's proposal envisions a variety of business park uses in major zones of the site to accommodate office, light industrial, warehouse/distribution, R&D, mixed-use office/retail, hotel, open space and a development reserve area. The plan includes a major "signature" office building in the southeast portion of the site which might be a major corporate headquarters and should have the latest in advanced telecommunications capability. Support uses such as site-serving retail were also considered to be important. The site was also envisioned to have an extensive open space and park system with developed open space and recreational amenities, in addition to stringent site development and landscaping standards.

##### Land Use Data:

Office/Light Industrial	23	Ac.
Office/Research and Development (R&D)	102	
Office	24	
Signature Office	59	
Mixed Use Office/Retail	105	
Warehouse/Distribution	81	
Development Park	17	
<u>Reserve</u>	<u>35</u>	
TOTAL	446	Ac.

## TEAM 2: "MIXED USE DEVELOPMENT"

### Theme:

"Crystal Canal Development Park"

### Description:

This concept focused on the the theme amenity of the "crystal canal", which is envisioned as an open space and surface water amenity running diagonally across the site. This unique amenity would establish a level of quality and help the community target high-tech and R&D companies, which could have a maximum positive impact on Missoula. This would be supplemented by the proposed hotel, training center and high-tech conference center which could feature advanced telecommunications capability.

Land uses in various sectors include warehousing/distribution, R&D, office, light industrial, commercial/retail, hotel and open space. In addition, areas for housing and reserves for future development have been identified. The extensive open space system would be supplemented by on-site development standards and landscaping.

### Land Use Data:

Warehouse/Distribution	82	Ac.
Research and Development (R&D)	79	
Commercial/Retail	64	
Signature Office	12	
Office/Light Industrial	23	
Residential	35	
Affordable Housing	42	
Hotel/Retail	26	
Open Space (Canal)	29	
<u>Reserve</u>	<u>54</u>	
TOTAL	446	Ac.

### TEAM 3: "ENVIRONMENTAL BUSINESS AND RESEARCH CENTER"

#### Theme:

"Center for Sustainable Development"

Concept Team 3 envisions an environmental research, development and training center as the central focus and theme of the Development Park. The Concept Team coined the name of this facility to be the "Center for Sustainable Development", which might be directed toward environmental clean-up and balanced development, potentially in a relationship with the University of Montana. Possible tenants to include: U.S. Forest Service museum, conservation organizations, environmental scientists and consultants.

The remainder of the land use would include compatible and supporting uses such as light industrial, R&D, warehouse/distribution, office, hotel, mixed use and reserve areas for future development. "Liveability" for employees and users was considered a high priority, and as a result green areas, buffer zones and bike and jogging paths were considered to be important features of the project.

Transportation internodal flexibility was also considered to be very important, given the availability of rail, automobile, truck and air transportation. Housing on the site was not considered to be a priority.

#### Land Use Data:

Warehouse/Distribution	60	Ac.
Light Industrial/Research and Development (R&D)	123	
Light to Medium Industrial	86	
Office/Lt. Industrial	14	
Hotel	26	
Mixed Use/R&D/Retail	48	
Open Space (Buffer)	42	
<u>Reserve</u>	<u>47</u>	
TOTAL	446	Ac.



## COMPARATIVE EVALUATION OF CONCEPT PLANS

After the concepts were presented to the Development Planning Committee, the consultant team prepared an evaluation of the team concepts which identified elements and other features which should be considered in the formulation of the Proposed Master Plan and Land Use Program. The "Framework Elements", which are summarized below, were common to all three plans and were recommended for inclusion in the Proposed Master Plan. Additional issues which were discussed and considered are documented in the memos in the Appendix.

### FRAMEWORK ELEMENTS

#### Road System

- The conceptual designs of the crossroad, freeway interchange and elevated West Broadway intersection were assumed to be fixed, and the Teams considered them to be satisfactory for the park. However, some participants expressed concern about the visual impact of the elevated earth structure that has been proposed for the Crossroad and West Broadway.

Subsequent to the completion of the team concepts, the Missoula County Commissioners decided to pursue a road and interchange design which would depress the crossroad below the level of the railroad tracks and existing West Broadway.

- Given the size and linear shape of the site, the Teams generally agreed that there would have to be multiple entrances or gateways to the site (possibly five of major importance) which could be developed to establish the project identity.
- The Teams emphasized that as future traffic levels increase, alternative configurations of the Butler Creek /West Broadway intersection should be considered. These include a constructing a grade-separated intersection at Butler Creek Road and West Broadway or closing this intersection and extending the expressway to the north.

#### Open Space System

- The undeveloped land between the northeast side of the site and adjoining Interstate-90 should be developed as a linear park and open space buffer system, with prohibitions against detracting visual elements such as billboards.
- An open space buffer should extend along both sides of the site, parallel with Interstate-90 and West Broadway. This perimeter buffer should link with the internal open space system.

- The Gooden Homestead should be preserved as an open space or park and incorporated into the open space buffer. A park should also be developed at the northwest end of the site, next to Desmet School.
- The Crossroad between the interchange and West Broadway should be designed as a heavily landscaped and amenitized parkway.
- Landscaping around the existing Momont Industrial Park is important as a means to visually buffer this development from other, less industrial uses.

#### Land Use

- Development on the site should be oriented to the private sector market and result in the creation of quality jobs for the community. Preferred uses are light industrial, manufacturing, warehouse, R&D, office and other employment uses which will result in broad benefits to Missoula.
- Relocation of existing Missoula businesses to the site is an appropriate component of the overall development strategy. Special consideration should be given to providing for employment uses which are beneficial to Missoula and which may not have available sites elsewhere in the community.
- Development sites on both sides of the Crossroad should be planned to develop to the "highest and best" use, which is likely to include hotel, retail, commercial and office uses. However, retail should be site-serving and not competitive with other retail locations in the community such as the Reserve Street corridor.
- Development along the length of the site next to Interstate-90 is anticipated to be highly visible from the interstate. Land use and building and site design in this area should provide a positive image when viewed from the interstate.
- Portions of the site along the railroad tracks would be reserved for uses which could require railroad access.
- Desmet School and Momont Industrial Park are existing developments which, for planning purposes, should be assumed to remain for the foreseeable future. The overall land use plan should be compatible with these existing uses, facilities and activities.

#### DEVELOPMENT CONCEPT

This portion of the report includes a discussion of the Development Concept for the site. This concept reflects physical site constraints and market opportunities identified by the consultant team as well as input by the Development Planning Committee and the County. It forms the underlying foundation for the Land Use Program and Proposed Master Plan, which follow.

## Development Considerations

Proven strategies for developing a successful employment-based project such as the the Airport Development Park include creating and sustaining momentum and support for the project, attracting anchor tenants and phasing the development and infrastructure in response to market demand. These strategies are all important in the case of Missoula for a number of reasons:

- The Missoula economy is in the process of restructuring, and appropriate facilities for new and existing enterprises need to be established if new jobs are going to be created for the community.
- Missoula is currently enjoying a "window of opportunity" relative to potential relocations by companies from urban locations such as Southern California.
- Additional users or other participants may be necessary to help fund infrastructure costs in addition to the street and transportation improvements which are to be funded in large part by the Federal government, which constitute the majority of the first phase of infrastructure.
- The site will need a "critical mass" of users and activity to create the demand for support services that are envisioned for the project, as well as to demonstrate project viability.

## Recommended Development Concept

The recommended concept for the Airport Development Park is to develop a high-quality employment center, university business park and business training center, with a wide range of uses that can be phased in response to market conditions and provision of infrastructure. The uses include non-polluting industrial, light industrial, warehouse and office, supported by retail, hotel, community uses and open space and parks. This concept is recommended for the following reasons:

- The property is large enough and of a configuration that can accommodate a variety of land uses, which will allow for the separation and phasing of these uses.
- Research has indicated that there is demand for a variety of uses based upon local, regional and national market conditions.
- The kinds of users which are being targeted for recruitment by the community find it advantageous to locate in a development park setting.
- Appealing to a broad spectrum of users including new businesses, expanding businesses and potential community uses will maximize the absorption of land, which will enhance the potential for success.



- The concept can complement the activities of the Missoula International Airport, as well as take maximum advantage of the planned surface transportation improvements in the area.
- The concept provides for a comprehensive approach to economic development by the following: (1) creating immediate jobs through construction and industrial development, (2) creating long term jobs through education, research and development and technical training, and (3) providing for public facilities which can serve area residents.

#### LAND USE PROGRAM

The preliminary Land Use Program, which is summarized below, provides a narrative description of the uses and activities which are envisioned for the site. These uses reflect the Development Concept for the site and are illustrated on the Proposed Proposed Master Plan.

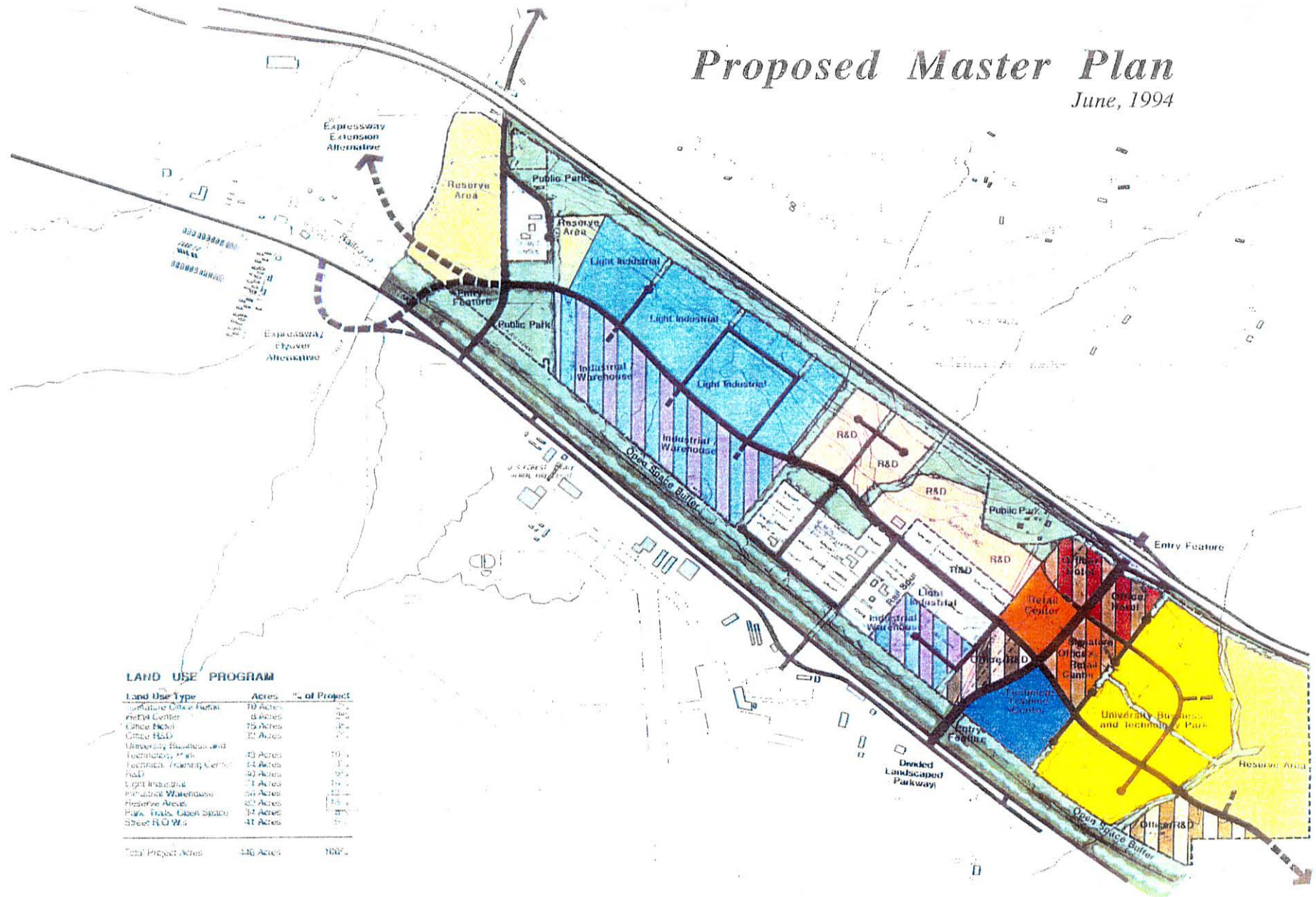
##### Land Use Data:

Land Use Type	Area	% of Project
Signature Office/Retail	10 Acres	2 %
Retail Center	8	2
Office/Hotel	15	3
Office/Research and Development (R&D)	32	7
University -Affiliated Business and Tech. Park	43	10
Technical Training Center	14	3
Research and Development (R&D)	40	9
Light Industrial	71	16
Industrial/Warehouse	56	13
Reserve Areas	82	18
Parks, Trails and Open Space	34	8
Street R.O.W.	41	9
TOTAL	446 Acres	100 %

Figure 4, which follows, describes in greater detail the recommended Land Use Program for the Development Park. In addition to itemizing the uses and their relative allocation on the site, this table includes a discussion of the appropriate functions and uses within each land use category, provides examples of the kind of the different types of development anticipated and summarizes special requirements of the users and/or facilities.

# Proposed Master Plan

June, 1994



## Missoula Airport Development Park

Missoula, Montana

HOH Associates . Leland Consulting Group . Drayvestein Johnson & Anderson

\*Note: This Draft Master Plan is subject to further refinement in coordination with the ongoing design of the road system, market input and the development plans of individual users and landowners.\*

EXISTING UTILITY EASEMENT  
CHECK ON GROUNDWATER DRAIN





## PROPOSED MASTER PLAN

The Proposed Master Plan which follows is the graphic depiction of the Land Use Program specifically applied to the Development Park site. It depicts land use in terms of location and magnitude as well as the physical relationships between land use and other project elements, such as the road system, open space system and existing and proposed development adjacent to the site.

The Proposed Master Plan is subject to further refinement based upon continued community input, additional data regarding the market and users, financing considerations and adjustments to the freeway interchange and primary road system, which is in the process of being designed. The Proposed Master Plan also provides a basis for preparing cost estimates, utility master plans and phasing strategies for the project, as well as more detailed planning studies and concepts.

Following is a summary of the major elements of the Proposed Master Plan:

### Land Use

The Plan envisions a variety of land uses on the site, including employment, support and community uses. This combination of uses is intended to create a high quality community asset while achieving the economic development and market goals of the project.

Major features of the plan include commercial development near the planned interchange and a university business park and technical training center south of the Crossroad, in the southern portion of the site, which reinforce the economic development focus of the project.

Employment uses comprise the majority of the Land Use Program and include office, research and development (R&D), light industrial, industrial and warehouse uses. They are located in a manner that can take advantage of site attributes while neutralizing the affects of the site's few negative features.

### Research and Development (R&D):

Planned for the area east of Momont Industrial Park and the Expressway, in the vicinity of the existing NURTURE facility, this development area will help to create a central focus of R&D uses, surrounded by open space and park amenities.

### Light Industrial:

These uses are envisioned northwest of the R&D area, between the expressway and Interstate-90. This area is to be surrounded on three sides by the site's open space system and is highly visible from Interstate-90. Because the area is currently undeveloped, individual site and facility layouts can be tailored to the needs of specific users.

Industrial/Warehouse:

Planned for the west side of the site, between the expressway, railroad right-of-way and Momont Industrial Park, this area is intended for users which may require direct access to the railroad tracks for the construction of railroad sidings or spurs onto their property. A separate area for Industrial and Warehouse is also planned adjacent to the southeast border of Momont Industrial Park, which could utilize the existing railroad spur which serves Roscoe Steel.

Office/Research and Development:

Two areas are anticipated to be developed with these uses in the future. One is on the north side of the Crossroad and the other is in the southern-most corner of the site.

Support Uses:

Concentrated in a highly visible and relatively central location along the Crossroad and near the intersection of the Crossroad with the expressway, these uses include hotel, office, and site-serving business services and commercial retail.

Current market interest suggests that at least one hotel site will be viable, although two hotel parcels are shown on the plan, with the potential of office development occurring with or instead of the second hotel.

Other support development along the Crossroad includes a small retail center and a signature office building, possibly with on-site retail. Both of these facilities could provide business services to park tenants.

Land use and site development along the Crossroad are both subject to refinement, in response to the on-going the technical design of the Crossroad and grade-separated crossing at the railroad.

University-Affiliated Business and Technology Park:

This development is proposed for the southeast end of the site, and is intended to be flexible in terms of land use,

accommodated a variety of R&D, light industrial and office uses.

The purpose of establishing this facility would be to create organizational and marketing linkages with a post-secondary educational institution (such as the University of Montana) that could result in positive synergistic effects as well as otherwise benefit development on the site.

#### Technical Training Center:

This special educational use is planned to be adjacent to the University-Affiliated Business and Technology Park, although it could share facilities with or possibly be incorporated into the Business and Technology Park.

The Technical Training Center is envisioned to contribute to the overall economic development concept by providing for on-going worker training and retraining for both public and private sector users, which would benefit the Development Park as well as the larger Missoula community.

#### Open Space System:

Perimeter and internal open space buffers, linear parks and public parks are illustrated on the Proposed Master Plan. Although some of the areas indicated as open space are not currently owned by the County, the purpose of the plan delineation is to indicate the overall concept and extent of the Open Space System for the site and immediate surrounding area.

The purpose of the Open Space System is to establish buffers between the Development Park and surrounding development, to buffer between different on-site uses, provide for surface drainage systems across the site and provide for amenities for Development Park users and the surrounding community, such as bike paths, trails and parks.

The open space system is envisioned to include existing sites and facilities such as the Gooden Homestead and Desmet School. Development of the open space system, in

coordination with the landscaping of the streets, is an opportunity to develop a unique and high quality theme and image for the Airport Development Park.

Reserve Areas:

Two development Reserve Areas are shown on the Proposed Master Plan, at both the southern and northern ends of the park. These areas are adjacent to off-site property which is currently undeveloped or partially developed, and which is anticipated to develop further in the future.

Identification of appropriate land use and formulation of development controls for these areas should occur with consideration of on-site and off-site development, the Missoula International Airport and related transportation and infrastructure improvements.

## SECTION VI:

# CAPITAL IMPROVEMENTS

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### INTRODUCTION

This section presents the consultant team's preliminary understanding of capital improvements requirements for the Airport Development Park as well as preliminary cost estimates. The purpose of this information is to identify the major capital improvements, both on-site and off-site, as well as to estimate the general magnitude of costs. This will aid in future analysis regarding the financing and phasing of improvements, allocation of future development costs and the creation of appropriate cost recovery mechanisms.

All capital improvement recommendations and cost estimates are subject to further refinement. Utility master plans for the Development Park, airport and surrounding area are anticipated to provide additional technical input for engineered systems as well as the land use Master Plan and overall planning framework.

### CAPITAL IMPROVEMENTS

Major capital improvements for the Development Park include improvements that fall within the physical boundaries of the park as well as those which serve the park and the surrounding area. In some cases, connections to serve the park may be possible from utilities already serving Momont Industrial Park. In other cases, new system connections will have to be established.

Based upon the Master Plan and the concurrent engineering work on the interchange improvement project, the following improvements are anticipated at the Development Park:

#### Road Improvements

Several types of roadways and other surface transportation improvements will need to be constructed, much of which is planned for the interchange project that is currently being designed. Roadways are to be on-site and off-site and include the expressway, cross road and interior roads. Related improvements are the interchange bridges and ramps, railroad grade separation, signing and signalization.

#### Water Mains

Water mains need to be constructed on-site, as well as storage and supply mains, which are to be located off-site.

### **Sewer Mains**

Sanitary sewer improvements need to be constructed. A combination of gravity and force mains is recommended, due to site topography.

### **Storm Drainage**

A storm drainage system will have to be established for the site and will include a combination of surface conveyance, underground conduits and on-site detention areas.

### **Gas, Electric, Telephone and Telecommunications**

These utilities will be provided by the respective companies serving the area and will have to be coordinated with the construction of the roads and other infrastructure.

### **Sidewalks and Bikeways**

Sidewalks will be necessary on both sides of the street, but can be phased in as development occurs. Provision for bicycles and other non-motorized transportation will also have to be developed in the park. The standards and location of these improvements should be developed in conjunction with the refinement of the Master Plan.

### **Park Amenities**

Park amenities and other image elements should be designed in coordination with master plan refinement and development of the marketing program. Costs and budgets will be established at that time.

### **Open Space and Parks**

The Master Plan shows significant areas devoted to open space and parks, both on-site and off-site. Costs for the development and management of these areas need to be coordinated with the overall project plan, and the character of these areas needs to be established as part of Master Plan refinement.

### **Site Development Costs**

After the major Development Park infrastructure is in place and available to development sites, individual users will need to extend this infrastructure onto their property to serve their facilities. These improvements and their associated costs (including plant investment fees (PIF's) and hookup fees) are anticipated to be born by the site developer or user being served.

## PRELIMINARY COST ESTIMATES

The following cost estimates for the Development Park infrastructure are based upon general system elements that can be discerned from the Master Plan and are preliminary in nature. The costs are categorized as "on-site costs", which are within the physical boundaries of the Development Park, and "off-site costs" which are outside of the park and may benefit other users (i.e. Airport, US Forest Service Complex and private property owners). The costs in this estimate do not include "site development costs" for individual users, which are described above.

### "ON-SITE" COSTS

These are costs that occur strictly on-site with the boundaries of the Development Park. Please note that items marked with an (\*) denote roadways that are to be constructed as part of the current Interchange Project.

#### Roadways

Expressway (48' curb to curb) *	10,200 LF	\$1,580,000
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Crossroad (72' curb to curb) *	3,200 LF	\$710,000
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Includes curb and gutter for both roads. If a median were constructed in the Crossroad, it would require additional curbing, resulting in greater costs.

Interior roads (45' curb to curb)	10,900 LF	\$1,600,000
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Water Mains	21,000 LF	\$1,100,000
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Does not include storage or supply main (see off-site costs).

Sewer Mains	19,600 LF	\$1,400,000
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Based on combination of gravity and force main system.

Sidewalks	45,300 LF	\$600,000
-----------	-----------	-----------

Both sides - separated  
5' width on expressway and interior  
8' width on cross road

Storm Drainage System	21,000 L.F.	\$1,000,000
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Based on combination of pipe, natural swales and detention pond system

### Street Lighting

Crossroad	45 Lights	\$160,000
Expressway	140 Lights	\$490,000
Interior	160 Lights	\$560,000

### Utilities

Primary services to be provided to site by the utility with hook-up fees for the individual tenants or developers. Includes gas electric, telephone and telecommunications. Costs to be provided at a later date by the utility companies.

### "OFF-SITE" COSTS

These are costs associated with the Development Park that are located off-site and may be beneficial to other facilities or landowners in the surrounding area, which could lead to cost-sharing in many cases. Please note that items marked with an (\*) denote roadways that are to be constructed as part of the current Interchange Project.

### Water

Storage	1,000,000 Gal.	\$350,000
Supply Main	2700 LF	\$150,000

The developer installs and pays for the main, pumps, storage, etc., and the water company may purchase system at 2 1/2% each year for 40 years.

### Other Road Costs \*

The following costs are related to roads, streets and related structures and improvements.

### Transportation and Roads \*

Underpass	\$1,250,000
Interchange Bridges and Ramps	\$1,800,000
Expressway	\$1,180,000
Signing/Traffic Control/Striping	\$500,000
Landscaping	\$80,000
Miscellaneous	\$100,000

### Signals/Lighting \*

Crossroad/West Broadway	\$90,000
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## CONCLUSION

Based upon this Preliminary Estimate, it is clear that infrastructure development costs for the Airport Development Park will be considerable. Costs within the park could be on the order of \$8 to 10 million, not including the costs for individual users to develop their parcels and lots. Costs for improvements outside of the park could range from \$3 to 5 million.

Assuming that the 371 acres within the Park are developable (based upon the Master Plan) and not taking into account that a significant portion of these costs will be paid for by the Interchange Project or shared with neighboring properties, a total infrastructure cost of \$11 - 15 million translates into an allocation of approximately \$30 to 40 thousand per developable acre within the Airport Development Park.

This allocation can be reduced due to two factors. The first is the potential impact of contributions by other parties in the area who benefit from these infrastructure improvements. The magnitude of this potential contribution is not known at this time. The second factor is the impact of Federal funding of the Interchange Project, which will reduce the overall infrastructure funding requirement by about half (approximately \$8 million), which in turn could reduce the developable land allocation to \$15 to \$20 thousand per-acre.

With this in mind, it is strongly recommended that a utility master plan overlay be prepared, based upon the Development Park Master Plan. This should provide more detailed information about water, sewer, storm drainage, gas, electric, telephone and fiber optic layout, as well as identify potential areas of cooperation and cost-sharing between the Development Park, airport and neighboring properties.

In addition, concepts for park amenities and other features should be developed and cost estimates prepared for these elements. Based upon these additional studies and related master plan refinements, cost allocation and recovery schemes can be formulated for the Development Park and surrounding area, which will allow development to occur in a phased manner, in response to market conditions.

## SECTION VII:

# STRATEGIC IMPLEMENTATION PLAN

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## INTRODUCTION

Missoula County, like many states in the Pacific Northwest, is at a critical point in its economic development efforts. Missoula County has long benefited from its geographic location within a timber rich region of the country. Historically, the County has maintained a steady rate of growth, relying extensively upon the lumber and wood products industry for its economic and employment base. However, recent changes in public policy, as well as increased modernization of existing wood products-related facilities have had a severe impact on employment levels. In an effort to counter the effects of the new legislation and changes within this industry, impacted communities have begun to seek out resources to attract new industries to diversify their local economies.

The Implementation Plan for the Missoula Airport Development Park is the critical next step in the development of an integrated strategy which can succeed in this effort. The study process completed thus far has been designed to build community consensus for action, thereby laying the foundation for implementation. With this in mind, the desired emphasis of the plan is on a creative, yet implementable strategic action plan which requires that the on-going planning and implementation process continue to both involve key community leaders and remain realistic in terms of current market opportunities.

The discussion which follows outlines a recommended strategy for development, management and marketing of the Missoula Airport Development Park. This plan is designed to increase the effectiveness of the County's development and marketing activities and provide growth management criteria for development of the park. Prior to the discussion of implementation options and priorities is an overview of conclusions drawn from a case study analysis of select public industrial parks located throughout the country. Case study analyses provide valuable insight by public sector entities which have faced the development process and are willing to share the lessons they have learned. In addition, conclusions from the case study analysis are directly transferable to this process, providing further support to recommendations for development of the park.

## INDUSTRIAL PARK CASE STUDY ANALYSIS

### ■ Industrial and Business Parks Interviewed

Name	Location
Waukesha Airport Park	Waukesha, Wisconsin
Dubuque Industrial/Corporate Center	Dubuque, Iowa
Tualatin Business Campus	Tualatin, Oregon
Carrollton Industrial Park	Carrollton, Missouri
La Junta Industrial Park	La Junta, Colorado

## SUMMARY CONCLUSIONS

### ■ Common Elements

- Developed by a municipal body, either city, county or jointly with an area development corporation.
- Developed within the last seven years, except Milford Industrial Park, the only park surveyed which was reported to be unsuccessful.
- Developed with basic infrastructure (i.e., roads, utilities, etc.). In select instances, the developing entity participated in the construction of tenant buildings.

### ■ Highlights from the Interviews

Community Population	1,107 to 90,000
Park Size	50 to 450 Acres
Project Start-Up Date	1982 to 1991
Design Guidelines	Protective Covenants and/or Restrictive Zoning; when Protective Covenants have been in place, they are enforced most frequently by a governing board comprised of public officials, business owners and tenants.
Site Condition	With the exception of Waukesha Airport Park which had one existing tenant, all of the municipalities were dealing with raw land.
Airport Affiliation	Two of the parks were located adjacent to an airport. In both instances, a fraction of the tenants were airport-related uses.
Amenities	<ul style="list-style-type: none"> <li>• Access</li> <li>• Visibility</li> <li>• Open Space / Walking Trails</li> <li>• Golf Course</li> <li>• Wetlands</li> <li>• Protective Covenants</li> <li>• Commercial Tenants</li> <li>• Water</li> </ul>

### **Tenant Restrictions**

Three of the seven park contacts reported a restriction on small office users, i.e., doctors, lawyers, etc. in favor of pure industrial tenants. Among the three, two have recently reconsidered the value of this restriction.

### **Enterprise Zone**

The Carrollton Industrial Park and Milford Industrial Park were the only parks located within an Enterprise Zone. However, the zone encompassing the Carrollton facility was in existence prior to development of the park. Additionally, the zone has not acted as either an attraction or deterrent to recruitment efforts. The zone encompassing the Milford Park was retired in October of 1993.

### **Linkages**

In the case of the larger parks, including the East Bay Business Center, there were linkages among tenants. In specific instances, there were linkages to businesses within the community, but not necessarily within the park.

Two of the parks reported research and training arrangements with local education institutions.

### **Marketing Efforts**

- Park Real Estate Broker
- Advertisements in Trade Journals
- Coordination with local and state economic development organizations.
- Low Interest Loans
- Land Write Downs
- Graduated Lease Payments - Land and Building
- 99-Year Land Lease
- City Subsidized Infrastructure
- Capital Improvements and Equipment Financing

### **Incentives**

Communities were either very opposed to the concept of incentives or strongly supported them, explaining the necessity for attracting tenants and supporting business growth.

## Financing

## Combination of funding sources:

- Tax Increment Financing District
- Combined Contributions of Land
- State Lottery Dollars
- Urban Renewal Money
- State Matching Grants
- EDA Funding
- Development Corporation Loans
- Municipal Utility Funds
- General Obligation Bond

## INDUSTRIAL AND BUSINESS PARK INTERVIEWS

### ■ Waukesha Airport Industrial Park

#### Location

Waukesha, Wisconsin  
20 miles west of Milwaukee, Wisconsin

#### Population

58,000

#### Park Theme

Affiliated w/ Waukesha County Airport;  
proximate to county technical institute.

#### Contact Person

Marian Ricker  
Waukesha County Commissioner

#### Physical Description

##### Acres:

92.5 Acres

##### Amount Developed:

46.4 Acres - 2.3 to 25 Acre Sites

##### Undeveloped Parcels:

5 Acres

##### Age:

1988

##### No. of Tenants:

14

#### Amenities

- Protective Covenants
- Location is an amenity; proximity to interstate and airport.

#### Financing

- Cooperative effort of the City and the County.
- Tax Increment Financing District helped to fund infrastructure.
- Land annexed into City to be part of District.

Revenues from district used for city and county park system.

<b>Tenant/Facilities</b>	Manufacturing and distribution facilities.
<b>Management/Organization</b>	<ul style="list-style-type: none"> <li>• Park governed by CC&amp;Rs and enforced by a board. Board is comprised of: a member of the County Board, representative of the City, business owners in the County and WCTC.</li> <li>• This board maintains absolute control.</li> </ul>
<b>Community Support/Opposition</b>	No public opposition. One existing tenant, the Humane Society, was concerned about their ability to maintain their location. The City and County allowed them to stay and has since deeded their land to them.
<b>Marketing Efforts</b>	A broker is engaged which actively markets the park.
<b>Experience Gained</b>	Initially restricted the location of non-industrial businesses which are office-intensive. This has been reconsidered in recent years.
<b>Other Comments</b>	<ul style="list-style-type: none"> <li>• Land had been left in trust to the County Board.</li> <li>• Parcels within the Park anticipated to be sold by 1999.</li> </ul>

■ *Dubuque Industrial/Corporate Center*

<b>Location</b>	Dubuque, Iowa
<b>Population</b>	60,000
<b>Park Theme</b>	Originally set aside as place for large manufacturing businesses affected by public action.
<b>Contact Person</b>	Jim Burke Community & Economic Development Director

## Physical Description

**Acres:** 50 Acres  
**Amount Developed:** 31 Acres - 8 to 18 Acre Sites  
**Undeveloped Parcels:** 4 to 5 Acres  
**Age:** Funding - Spring 1991  
Construction - Fall 1991  
**No. of Tenants:** 2

## Amenities

Location, built along arterial road surrounding the City.

## Financing

- Combined effort by the City and Greater Dubuque Development Corporation. Effort included equal contributions of land.
- EDA funding for industrial center and adjacent commercial park.
- State "RISE" program-matching grant for infrastructure.
- TIF District established which provided funding for grading (\$500,000).
- First building constructed by Development Corporation and sold to tenant over 15 years (land and building). This allowed tenant to retain money for growth; tenant is currently up to 180 employees.
- Second tenant built their own building; they have grown from 25 to 90 employees.

## Tenant/Facilities

- Engineering software co. - AUTOCAD clone; R&D facility.
- Publishing company; manufacturing/distribution facility.
- Nordstrom's distribution facility

## Management/Organization

Board comprised of two members from the City Council, local business representatives and tenants.

Development Corporation monitors program and pays the City a fee for technical support.

## Community Support/Opposition

City dealt with public opposition several years prior to development of the center. Lessened opposition once there was an

understanding that the City's intent was for the park to provide space for expanding and relocating firms due to public action.

**Marketing Efforts**

City funds Development Corporation, and Development Corporation markets the facility.

**Experience Gained**

Constant concern with creating business (office space users) outside the downtown business core. This concern is lessened by the limited supply of land proximate to downtown.

**Other Comments**

- TIF District disposed of through Urban Renewal dollars.
- EDA required two tenants to be committed to locating within the park.
- EDA was attracted to project because of the joint effort between the City and Development Corporation.
- Airport services important to Nordstrom facility because of air freight.
- There has been tremendous spin-off from the proximity of both centers.

**Incentives**

- Write-down on the cost of the land.
- Low interest loans from Development Corporation.

■ *Tualatin Business Campus*

<b>Location</b>	Tualatin, Oregon
<b>Population</b>	15,000
<b>Park Theme</b>	High Technology
<b>Contact Person</b>	Janet Young Economic Development Director

**Physical Description**

<b>Acres:</b>	230 Acres
	25 Acres - Wetlands
<b>Amount Developed:</b>	217 Acres - 5 to 60 Acre Sites*
<b>Undeveloped Parcels:</b>	16 to 46 Acres (Divisible into 5 Acre Sites)



**Age:**

1989 - First Sale

**No. of Tenants:**

3

1 - Under Construction

1 - Plan Submitted for Review

\* 40 Acre minimum until recently.

**Amenities**

25 Acres of Wetlands

**Financing**

- Created Urban Renewal District of 377 acres which covers business campus; District provided \$4 million for improvements.
- City has an option on 200 acres of the business campus; option is passed through to tenants.
- State lottery loans provided additional contribution for infrastructure.

Originally sold sites fully improved; after the passage of Measure 5 (tax limiting measure passed by the State), new tenant must fund some off-site improvements.

**Tenant/Facilities**

- Semi-Conductor assembly facility
- Flexible stainless steel tubing
- Chemical manufacturer
- Security systems manufacturer

**Management/Organization**

City Economic Development Department

There are no CC&Rs since zoning provides guidelines and restrictions. Campus zoned for a high-tech manufacturing park.

**Community Support/Opposition**

None

**Marketing Efforts**

- Broker is retained to market the Campus.
- City representatives periodically visits Japan to maintain good relations with the sister company of park tenants.
- Leverages relationship with Portland Development Commission and Oregon Economic Development Department (partially funded by the City).
- Advertising in the Oregon Business Journal.

**Experience Gained**

If the City had known that Measure 5 would have passed, they could have put in more infrastructure up front.

**Other Comments**

- Although no existing business linkages have occurred, potential tenants have expressed a desire to be adjacent to existing businesses.
- City has been able to fund other projects with revenue from the District, as long as a clear connection was established.

**■ Carrollton Industrial Park****Location**

Carrollton, Missouri  
80 miles northeast of Kansas City, Missouri

**Population**

4,400

**Park Theme**

NA

**Contact Person**

Patty Kinder  
Director of Chamber & Economic  
Development

**Physical Description**

<b>Acres:</b>	130 Acres
<b>Amount Developed:</b>	103 Acres
<b>Undeveloped Parcels:</b>	4 to 6 Acres
<b>Age:</b>	1989
<b>No. of Tenants:</b>	3

**Amenities**

- Highway frontage (230-250' depth) reserved for commercial retail development.
- Built lake for aesthetics.

**Financing**

- EDA Funding
- Public Utility Fund (Municipal)

**Spec Building Program:**

- EDA and municipal funds used to finance construction of first building; tenant entered into 10 year purchased agreement with a graduated lease.

#### **Tenant/Facilities**

- Same funding for second building with tenant in long-term lease.
- Third tenant was a home-based business that outgrew home; tenant built building to minimum specs and leased land for 99 years.
- Fourth building built by the City; 40,000 square feet, expandable to 100,000 square feet. First tenant expanding into this space.
- Light manufacturing facility, tenant had existing facility 60 miles away.
- Hallmark card folding and packaging company; existing business in town which needed to relocate.
- Screen printing - sportswear; local firm which needed to expand.

#### **Management/Organization**

- Public Superintendent - since municipal funds used to finance infrastructure.
- Park is located within an Enterprise Zone which was established in 1986.

#### **Community Support/Opposition**

Less resistance since a ConAgra plant had recently closed employing 450 to 500 residents of the area.

#### **Marketing Efforts**

Chamber and Economic Development Department work with the State Department of Economic Development in identifying potential relocating and expanding firms.

#### **Experience Gained**

"Do not forget to take care of the perceptions of other business owners in the market. Do not ignore what you already have."

#### **Other Comments**

- City is currently trying to get a business center built for companies affected by the Flood of 1993.
- Could not locate near airport since airport is in south part of town and park is in a flood plain.
- No small businesses allowed (i.e., construction company requested space).

■ *La Junta Industrial Park*

**Location** La Junta, Colorado

**Population** 8,000

**Park Theme** Affiliated w/ La Junta Airport

**Contact Person** Les Rumberg  
Assistant City Manager

**Physical Description**

**Acres:** 350 Acres

**Amount Developed:** 35 Acres - 4 to 10 Acre Sites

**Undeveloped Parcels:** 1 to 20 Acres

**Age:** 1987

**No. of Tenants:** 10

**Amenities**

- 9-Hole Golf Course
- General Aviation Service
- Rail Access

**Financing**

- Combined effort of City and La Junta Development Corporation.
- Infrastructure financing provided through City's electric utility fund.
- EDA funding for strategic planning and marketing.

**Tenant/Facilities**

- Falcon Industries - machine fabrication
- Lewis Bolt & Nut - industrial fasteners
- School locker manufacturer
- Empire Aviation - aviation repair
- Aviation dealer
- City of La Junta maintenance garage
- UPS warehouse

**Management/Organization**

- Park managed by City through Community Development Department.
- Marketing of park is responsibility of La Junta Development Corporation.

**Community Support/Opposition**

Community support for park has been relatively favorable, particularly after strategic plan was formulated and organized marketing efforts were implemented. Opposition has been lessened due to the lack

of a competitive private industrial park in the market area.

#### **Marketing Efforts**

City funds La Junta Development Corporation and Development Corporation markets the park.

#### **Experience Gained**

- City commitment to strategic plan and ability to self-fund infrastructure has given it added flexibility in attracting tenants to the park.
- The emphasis on job creation and "clean" industry has served to strengthen community support.

#### **Other Comments**

- Coordinated effort of City and Development Corporation is key to ensuring that prospects'/tenants' needs are addressed.
- La Junta's emergence as a secondary regional service transportation center has created additional momentum for the park.
- The proximity to air/rail service, while not the primary determining factor, has nonetheless contributed to the park's attractiveness.
- City's pro-business administration and proactive economic development posture has assisted in attracting users to the park.

#### **Incentives**

City offers infrastructure, capital improvements and equipment financing through its electric utility fund. Tenants repay through lease payments, which are written down from market levels based on the amount of full-time jobs created.

#### **■ East Bay Business Center**

##### **Location**

Provo, Utah

Within the southern quadrant of the City where business and industry are concentrated.

##### **Population**

90,000

**Park Theme**

- Amenity driven.
- Combined commercial and business center.
- Designed Center to take advantage of highway access, recreational amenities and high-tech opportunities.

**Contact Person**

Albert Camahalie  
Project Manager

**Physical Description****Acres:**

450 Acres  
200 Acres - Recreational Amenities & Wetlands

**Amount Developed:**

50 Acres - Infrastructure

**Undeveloped Parcels:**

420 Acres

**Age:**

2 to 30 Acres

**No. of Tenants:**

1986 Construction began

32: 16 Industrial/Business Tenants  
16 Retail Tenants

**Amenities**

- Adjacent to Utah Lake
- Existing municipal golf course replaced with 18 hole executive style course.
- Open space w/ walking trails
- Protective Covenants

**Financing**

- Combination of funding sources.
- Initial funding with EDA grant (108 Loans).
- City funded construction of the golf course.
- City money pledged as a guarantee on the loans.

Business Center is debt-free today and revenue is directed at economic development activities within the community.

**Tenant/Facilities****Business:**

- Novell - Designs and manufactures network software. (500,00- sq. ft.)
- New Skin - Develops and distributes skin care products. (100,00 sq. ft.)

**Retail:**

- Bank, Credit Union
- Sizzler, Village Inn, McDonalds
- K-Mart, Pace, Home Improvement

### Management/Organization

- Park governed by CC&Rs and enforced by board; board is comprised of property owners and seven elected officials. New tenants must submit plans to the board for approval.
- CC&Rs enforce compliance with building design; environmentally sensitive.

### Community Support/Opposition

"A lot. It took the vision, integrity and guts of the community officials to see it through. In addition, the environmental restraints (wetlands) associated with the property made it undesirable to private developers."

### Marketing Efforts

- Advertisements in *Site Section* magazine
- Trade Shows
- Testimonials from existing tenants
- Promotion for the City:  
1991 *Inc.* magazine City of the Year  
1989 Top Business Park

### Experience Gained

This business center has set the standard for the rest of the City to follow.

### Other Comments

- Although no direct affiliation with the local University, several software companies have been a direct spinoff of the University.
- Linkages have developed within the center and the community because of tenants within it.
- Golf course drives the land values.

### ■ Milford Industrial Park

#### Location

Milford, Utah

#### Population

1,107

#### Park Theme

NA

#### Contact Person

Nedva Kennedy  
City of Milford

## Physical Description

Acres:	50+ Acres
Amount Developed:	10 Acres - 2 Sites
Undeveloped Parcels:	40 Acres*
Age:	1982
No. of Tenants:	2

\* Integrated pork operator signed a lease option for balance of undeveloped property in February 1994.

## Amenities

- Protective Covenants
- Inexpensive land (\$3,000 per acre)
- Available water
- Access to West Coast
- Union Pacific Railroad used to have a rail spur in the park, but it was taken out several years ago.

## Financing

- City purchased land with funds from General Obligation Bond and Community Impact Board Fund (State).
- Infrastructure funded with EDA money.

## Tenant/Facilities

- Public storage units
- Public utility
- Integrated pork operator - offices and feed mills

## Management/Organization

Board comprised of: members from the City Council, Chamber of Commerce, tenants and Zoning Department.

Park was located within an Enterprise Zone when developed, but zone was retired in October of 1993.

## Community Support/Opposition

Decision to develop a park was based on the necessity to attract industry. Although the park is currently fully occupied, it took nearly 12 years, with only two tenants in place until February 1994. Because of this, the public's perception of the project has been negative.

## Marketing Efforts

Active business recruitment by the City of Milford.



### Experience Gained

Two factors are perceived to have contributed to the lack of success of the park, the size of the community and the time it was developed.

The park contact reported, that if the park had been developed today, the timing would have been right.

### Other Comments

Milford's remote location is considered a disadvantage from the perspective that it loses industry opportunities to the communities of St. George, located 100 miles to the west, and Cedar City, located 50 miles to the east.

## IMPLEMENTATION OPTIONS AND PRIORITIES

The recommended development concept for the Missoula Airport Development Park is an employment-based, mixed-use, multi-phase, land development project involving a range of land uses and activities. There are several benefits to development of a mixed land use program. First, a mixed development is required in order to accomplish the mission and objectives outlined by the Development Advisory Committee, Concept Teams and County Commissioners. Second, the property is large enough and the individual markets are competitive enough to necessitate addressing multiple markets at the same time. Third, given the size of the property, a single land use concept, including a single industrial use i.e., Research and Development (R&D), inherently requires a longer absorption period, thus increasing the County's carrying costs on the land and delaying their return on investment. Fourth, this concept serves to increase project revenue and development activity, as well as recapture front-end investment dollars as early as possible. The plan presented herein provides for a comprehensive approach to development of the park, including immediate jobs through industrial and business development, long-term jobs through education, research and training facilities and development of public facilities to serve residents and existing businesses in the area. A detailed outline of implementation options within the plan are presented in a series of tables following a narrative discussion of the recommended plan components.

The major components of the implementation plan are defined, and presented in sequential order, in the discussion below. Within this discussion (and tables which follow) several issues are raised for consideration by the County prior to adoption of a strategic plan for development of the property. These issues follow a critical decision-making path and include: a development strategy, defined organizational structure (entity), strategic plan for disposition of the land and development of buildings, accepted management structure; defined funding mechanism(s), park image and marketing strategy. Prior to moving into the next stage of this project - development of the park - several decisions need to be made, all of which will be impacted by the County's short and long-term objectives for the community. Given the size and potential impact of the Missoula Airport Development Park within the market, it is

critical to review all of the options available to the community. Therefore, the tables following this discussion, present in greater detail, the plan options within major components, as well as the resultant implications.

**Development Strategy:**

The development strategy is a critical decision for municipal bodies to make prior to implementing a development project. The development strategy is the method by which the County will approach development or disposition of the property; a decision which is influenced by the County's short and long-term goals for the community. Specific factors to be considered include the role of the County and expectations concerning acceptable risk and anticipated reward.

There are three development strategies presented in the Table 1 following this discussion. These strategies are: County acts as master developer for the park; County sells or leases all or a portion of the property to a private developer; and, a joint venture is established between the County and a private entity or organization. The strategies are defined and their implications presented in Table 1.

**Infrastructure:**

The County will need to fund and build additional improvements within the park upon completion of the access road and expressway. In order to be most effective, improvements should be rational, comprehensive (not piecemeal), and phased in over time. These improvements will require up-front money, therefore, an established system will need to be in place for recovery of these infrastructure costs.

In order to address this issue, additional plans for utilities, road systems, etc. and their phasing within the project will need to be prepared and incorporated into a proforma for the development.

**Organizational Structure:**

An effective organizational framework and community leadership are essential components of a successful strategic implementation action plan and develop-

ment program. The organizational structure (entity) maintains development oversight, management and marketing of the property, as well as funds, finances and negotiates development agreements and leases within the project.

As outlined in Table 2, the organizational entity can be the County, a separate entity established by the County - public, private, or quasi-public, non-profit or private. A decision regarding the critical characteristics of this entity, its role and relationship to government will need to be established at the onset of the implementation process.

#### Disposition and Facilities Strategy:

Disposition of the park property can be implemented by several methods within the organizational entities described above. Disposition methods include a variety of sale and lease arrangements and the County will need to consider community interests, long-term goals, and mandates of the organizational entity, as a basis for selecting which methods are appropriate.

As a development entity, directly or indirectly, the County would need to consider the capital value of individual parcel sales compared to long-term leases, balancing short and long-term project objectives, including a potentially short-term window to dispose of higher value sites along the access road.

Another disposition strategy to be considered is a "quick sale" of a portion or the entire property to a private developer. Under this scenario the County would be forced to accept a bulk sale price for the property, an amount typically equivalent to 70 percent of the market rate price. This decision will be influenced by the organizational structure in place.

The final scenario for consideration is land banking portions of the property. This method would allow the County to hold the property in reserve until such time it deemed

appropriate to proceed with development. Excessive carrying costs make this option less desirable.

These disposition scenarios are presented in Table 3.

#### Management Structure:

Management of any large-scale project, particularly one as diverse as that planned for the Airport Development Park, will require a centralized system of management. The specific management entity can be public, private or a combined public/private structure.

Since the primary purpose of a strategic implementation plan is to increase the effectiveness of the area's development activities, emphasis should be placed on an intensive interaction between the development management staff, appropriate representatives of the local economic development organization and the County Administrator, regardless of the management structure.

Management options are presented in Table 4.

#### Funding Mechanisms:

As illustrated in Table 5, several capital resources can be considered for funding the park infrastructure. Among them, traditional financing sources include: banks, savings and loans, etc.; assessment districts; public grants; and municipal funds.

It is recognized that Missoula County will receive an influx of federal dollars with construction of the access road. However, project costs will exceed this amount, thus requiring additional funding from alternative sources.

Among the resources outlined here, it is most likely that some combination will be required, as any one source will be insufficient to cover the entire development cost.

### **Park Image:**

Identifying a project's image is the first step in marketing it to potential tenants. The image selected should be based on the community's goals and objectives, identified industry opportunities, as well as the market's locational strengths and weaknesses. The image will set the stage for specific types of tenants and facilitate the marketing effort.

Several image options are presented in Table 6.

### **Marketing Strategies:**

A carefully designed and administered marketing program for the Missoula Airport Development Park, as well as other developable properties throughout the County, should incorporate the skills of a project management team and local officials.

The County, Missoula Area Economic Development Corporation, Chamber of Commerce, Montana Department of Commerce, business associations and others need to form a cooperative consortium in an effort to coordinate regional and national marketing efforts. While each entity may have their own economic development objectives, the region will benefit from a coordinated effort to attract industry to the Missoula area. In addition, a coalition of various entities will stand a better chance of accessing limited public resources available for economic development.

Specific issues to be addressed within the context of the marketing program for the park include: development organization vs. County responsibility; value of retaining a national brokerage firm; and reliance on the economic development corporation. Options within these issues include: method of sales, market research and planning, promotion, public relations and inquiry services.

The supervising entity, whether the County or other designated organization, (i.e., project manager, economic development corporation), should have the benefit of a

well-funded information system by which to process inquiries, gather marketing intelligence, forecast market potential and serve prospective tenants.

Marketing options and strategies are presented in Table 7.

#### Tenant Incentives:

While Missoula County offers many advantageous environmental and cost characteristics, making it an attractive location for facility relocation, the area must continually seek to refine its business attraction efforts. An increasingly competitive economic development environment is placing pressure on local and state governments to offer incentives to new industries. The County needs to evaluate which resources and tools are necessary to attract new investment.

Incentives offered by the public industrial parks interviewed for the case study analysis are described in Table 8.

#### Park Amenities:

The recommended development concept for the park is a mixed-use project including industrial, office, commercial retail, hotel and open space land uses. As evidenced in the Case Study Analysis, the most successful development parks incorporated a mix of land uses including business service, retail, restaurant and open space. In addition, the Concept Teams identified park amenities as valuable components to the plan.

These alternative land uses serve a dual purpose. First, supporting land uses are attractive to potential tenants, thus facilitating marketing efforts. Second, the early sale of commercial sites within the project provides immediate cash to the project and serves as a catalyst for additional investment.

Suggested park amenities are outlined in Table 9.

## **Additional Issues for Consideration**

### **Regulatory Environment:**

The success of a project of this size and influence will be dependent upon a high-quality, consistently operated business environment. Design and development guidelines are perceived by industry and businesses as the best protection for assets constructed within the park.

Regardless of the development strategy, design covenants and zoning should be established by the County and enforced by the development organization.

### **Community Support:**

The importance of this project to the Missoula community lies not only in the creation of jobs, service benefits to business and support for private investment, but also in its impact on the area's quality-of-life. The attractive living environment in the County is the one locational advantage that is common to all types of facilities and industries. It represents a strategic competitive advantage to the area for business attraction and retention. Many business owners can influence the location decision process, typically choosing an attractive community with an inviting environment where they can operate their business effectively.

However, the County will also have to support and encourage growth of the area's infrastructure needs i.e., the development park, to support future investment. With identification of potential industries for the project, there is an increased sense of urgency in taking action to complete this and other public works projects.

Economic development is more than creating a physical and financial environment for industry growth. It involves establishing a community spirit that is attractive to the corporate site seeker. Managers of relocating facilities will not only be operating a business which requires public assistance in terms of permitting, taxing and hiring, but they will

be transplanting their families. Siting representatives will look at the educational system, the climate, cultural events and local resources in order to evaluate citizen commitment to the community. They will look for the assurance that as their company grows, the physical, political and social infrastructure is in place to accommodate this growth and that it will be perceived as a positive addition to the local economy.

### STRATEGIC IMPLEMENTATION PLAN RECOMMENDATIONS

When completed, the park represents approximately \$24 to \$27 million in land sales (or lease equivalents) and in excess of \$100 million of total capital investment involving the development of land and buildings. This does not include the direct and indirect economic benefits that come from construction nor the ongoing payroll, both direct and indirect, resulting from jobs that are created within the park. For a project of this magnitude to be successful, recognizing that success is dependent upon a high-quality, consistently operated, maintained and dependable environment, the recommended structure is a focused, land development organization designed to both implement the park's development, operate it responsibly and attract regional and national tenants. Under this scenario, the County sells or leases the property to the development organization, which in turn serves as an intermediary to government and park tenants, representing the interests of both.

The reason that a land development entity is recommended over a land and facilities development organization is several fold. First, the greatest profits in development are in the land portion of the project. A reasonable target for land profitability is 30 to 35 percent of gross land sales on a pre-tax basis. Second, a land development organization is a lean structure, requiring fewer personnel and therefore, less operating capital on a year-to-year basis. Third, local government which participates in building construction can be perceived as competing directly with the private sector. This is not to say that the County could not participate (i.e., contribution of land to a contribution of experience and capital) in select building development projects within the park.

The success of development projects is most often a direct correlation to the quality of management. For a project of this magnitude to be successful, it will necessitate an experienced project manager with a select staff of professionals. Although the management staff may be small (two to four people) only the highest quality and experienced project manager should be considered to direct the organization. This person should have a demonstrated track record in large-scale industrial and mixed-use developments, a history of financial successes while achieving a quality environment, and a range of skills including development, finance, sales and administration. Additional staff should include a secretary/sales assistant and a project technician.



The operating budget for the organization should be designed in such a way as to take advantage of a variety of professional alliances including legal, accounting, advertising, public relations and a range of physical design consultants. This structure is proposed in lieu of retaining these individuals on the payroll. In addition to alliances with business service professionals, a coordinated marketing effort will need to be established between the project management staff and the Missoula Area Economic Development Corporation (MAEDC). Assisting the Project Manager with management of the Park might be an Advisory Board comprised of public officials, local business owners and operators, tenants of the Park and representatives of the Missoula Area Economic Development Corporation. However, the most valuable contribution MAEDC could provide is in marketing the Park to potential tenants.

In addition to those criteria described above, several significant issues exist with a project of this nature. Real estate development is always subject to the pressures of shifts in the market, fluctuation in the cost of capital, overbuilding and other industry issues. Proposed mitigation for these and other extraordinary challenges that could impact the Missoula Airport Development Park are as follows:

- Establish a management organization which can operate as a business and insulate management from local politics.
- Establish a direct reporting relationship between senior project management and the County Administrator, thereby minimizing directives from a variety of people and institutions.
- Provide for an adequate annual budget to assure that technical services and particularly marketing services are available and appropriate to industry standards.

For a project of this scale and magnitude to be successful, it will require the establishment of rigorous standards and design guidelines, as well as ongoing performance requirements. The "payday" for land development projects comes at the end of the project rather than the beginning. The key to successful land development is early sales and a lot of them. However, quality must be maintained throughout the course of the project. Discriminating businesses welcome a tightly-regulated environment in which landscaping and building standards are adhered to, grounds are maintained and other standards are rigorously upheld, thereby protecting the value of any individual asset constructed within the park.

#### Summary of Principal Recommendations

Development Concept:	Employment-based, mixed-use, multi-phase, land development project involving a range of land uses and activities.
Development Strategy:	Public/Private Joint Venture - County and private developer contribute some combination of the following: land, capital and experience to development of the property.

Organizational Structure:

Development Authority - Entity which maintains oversight of development, management and marketing; funds, finances and negotiates development agreements and leases. A viable development entity under this scenario would be a Port Authority.

Disposition and Facilities Strategy:

Combination of Land Sales and Leases - Disposition strategy is influenced by community interests, long-term goals for the project and mandates of the organizational entity. A viable strategy would be sale of the high value sites along the access road. Sites identified for future public use could be retained and held in reserve for future use and select sites may be leased if the immediate use and facilities are temporary.

Management Structure:

Experienced Project Manager - It is recommended that an independent, experienced individual be recruited through a cooperative search by the joint venture partners. Individual may act as Project Manager for this project exclusively, or as Director of the Development Authority.

Park Image:

Combined Image - Affiliation with the Airport, Government and the University.

Funding Mechanisms:

Combination of Public and Private Dollars - State and Federal grants and capital dollars from the joint venture partner.

Marketing Strategies:

Coordinated effort with Project Management staff and Missoula Area Economic Development Corporation.

## IMPLEMENTATION OPTIONS AND PRIORITIES

**TABLE 1: STRATEGIC IMPLEMENTATION PLAN DEVELOPMENT STRATEGY**

Options	Definition	Implications
<ul style="list-style-type: none"> <li>County - Master Developer</li> </ul>	<p>County installs basic infrastructure (i.e., utilities, roads, curb &amp; gutter, landscaping and signage); then sells or leases individual parcels to park tenants.</p>	<ul style="list-style-type: none"> <li>County incurs the financial risk involved in being a real estate developer.</li> <li>County fully benefits from the proceeds from the sale of the property.</li> <li>County retains control of the quality of development and costs associated.</li> <li>County forced to dedicate staff to development of the market. In addition, hires project development staff including recruitment of experienced project manager, sales staff and technician.</li> <li>County and project development staff responsible for day-to-day marketing and maintenance of the development process.</li> </ul>
<ul style="list-style-type: none"> <li>Private Developer</li> </ul>	<p>County sells property to one or more private developers. The sale can be coupled with CC&amp;Rs and zoning to ensure compliance with community goals. The private developer obtains financing for development of the infrastructure. This approach requires that the selected private developer has regional and national experience with projects of this magnitude in a market with characteristics similar to Missoula. The developer would also have to be well capitalized.</p>	<ul style="list-style-type: none"> <li>Market value price for the property would be based on a bulk sale price (significantly less than if the property were to be sold as individual parcels.)</li> <li>Issues outside the control of the CC&amp;Rs would be out of the control of the County.</li> <li>Minimal on-going risk to the County.</li> <li>County benefits from the experience of a nationally and regionally recognized developer.</li> <li>County will be impacted by the developer's long-term goals for the project, usually different than the public agency's.</li> </ul>
<ul style="list-style-type: none"> <li>Public/Private Joint Venture</li> </ul>	<p>County and private developer contribute some combination of the following: land, capital and experience to development of the property. A typical scenario under this type of arrangement would be the contribution of land and equity for infrastructure by the County; capital, experience, project management and marketing by the developer. Both entities then share in the project's revenue stream.</p>	<ul style="list-style-type: none"> <li>Shared risk and reward.</li> <li>Potential for disagreement over development issues including: infrastructure costs, management structure and disposition strategy.</li> <li>Potential for complications associated with establishing a quasi-public organizational framework (i.e., Port Authority).</li> <li>County benefits from the experience and contacts of a nationally and regionally recognized developer.</li> </ul>

**TABLE 2: STRATEGIC IMPLEMENTATION PLAN - ORGANIZATIONAL STRUCTURE**

Options	Definition	Implications
<ul style="list-style-type: none"> <li>Public Development Authority</li> </ul>	<p>County sells or leases property to a public entity (Development Authority). The Authority hires staff, develops agreements raises money and negotiates leases.</p>	<ul style="list-style-type: none"> <li>County becomes less involved with daily maintenance of development, marketing and management processes.</li> <li>County indirectly maintains control of design and building standards.</li> </ul>
<ul style="list-style-type: none"> <li>* Port Authority</li> </ul> <p>between government and private enterprise.</p>	<p>A quasi-government entity which operates A port authority has elected or appointed officials which represent a port designated district.</p>	<ul style="list-style-type: none"> <li>Imposition of an additional layer of government on the public; additional taxation.</li> <li>Port Authorities have the ability to buy, sell, lease and hold land.</li> <li>Port Authorities obtain revenue directly from operations and taxes levied within the District.</li> <li>Port Authorities can lobby government.</li> <li>Port Authorities are recipients of a diversity of federal assistance programs.</li> </ul>
<ul style="list-style-type: none"> <li>Private Non-Profit Corporation</li> </ul>	<p>County sells or leases property to a private non-profit corporation established specifically to develop the site. The Corporation can utilize industrial revenue bonds for financing raise private capital and accept government grants and loans to stimulate development.</p>	<ul style="list-style-type: none"> <li>County relinquishes control of the park's development, marketing and management of the park.</li> <li>County relinquishes control (outside the CC&amp;Rs) over tenant selection and site use.</li> <li>Existing debt on the land is retired (under a sale).</li> </ul>

**TABLE 3: STRATEGIC IMPLEMENTATION PLAN • DISPOSITION AND FACILITIES STRATEGY**

Options	Definition	Implications
<b>Disposition Strategies</b>		
Sales Strategies:		
•• Quick Sale of Sites	Sell sites (premium sites along "Blue Chip Corridor" and interior sites) at market rate to first or highest bidder. Under this scenario, zoning might require adjustment to accommodate tenant.	<ul style="list-style-type: none"> <li>• Additional funding for park infrastructure.</li> <li>• Potentially meet short-term objectives at the expense of long-term goals.</li> </ul>
•• Sale to Highest & Best User	Retain sites for most appropriate use and tenant. Under this scenario, tenant siting will be in compliance with the master plan and zoning designation.	<ul style="list-style-type: none"> <li>• Protect gateway to the project from less appropriate uses.</li> <li>• Risk losing tenant to alternative location outside the park and/or County.</li> </ul>
Land Banking	County retains ownership of the property and holds it in reserve for future development.	<ul style="list-style-type: none"> <li>• Allows for future flexibility; generating potentially higher revenue.</li> <li>• Carrying costs associated with retaining land over time with little or no revenue.</li> </ul>
Leasing Strategy		
•• Long-Term (99 Year) Lease	County retains ownership of land, receiving lease payments from tenants.	<ul style="list-style-type: none"> <li>• Revenue to the project from new tenants distributed over time versus up-front.</li> </ul>
<b>Facilities Strategies</b>		
• County - Facility Developer	County constructs multi-tenant and/or incubator buildings for occupancy by start-up companies. Leases to tenants within incubator buildings are generally 5 years, with a graduated payment schedule which grows with the company.	<ul style="list-style-type: none"> <li>• Incentive to smaller less capitalized start-up companies.</li> <li>• County retains control over tenant mix.</li> <li>• County assumes marketing responsibilities.</li> <li>• County incurs additional risk in funding buildings and getting them leased.</li> <li>• Requires a different set of skills than land development.</li> </ul>

**TABLE 3: STRATEGIC IMPLEMENTATION PLAN - DISPOSITION AND FACILITIES STRATEGY -- CONTINUED**

Options	Definition	Implications
<ul style="list-style-type: none"> <li>• <b>Build-to-Suit</b></li> </ul>	<p>Streamlined system which responds to the facility building needs of potential tenants. One method is pre-prepared drawings of basic industrial building shells, which can be customized for occupancy by a variety of tenants. Another method is a process for building design approvals which minimizes the time for construction and occupancy.</p>	<ul style="list-style-type: none"> <li>• Ensures building quality.</li> <li>• Provides a streamlined process for building and approvals.</li> <li>• Incentive to relocating and businesses.</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Relocate Existing Businesses</b></li> </ul>	<p>Facilitate the relocation of existing Missoula area businesses which are currently located in a less desirable location or facility. (i.e., EDA)</p>	<ul style="list-style-type: none"> <li>• Letters of intent from new tenants will qualify County for public financing programs.</li> </ul>

**TABLE 4: STRATEGIC IMPLEMENTATION PLAN • MANAGEMENT STRUCTURE**

Options	Definition	Implications
<b>Management Entity</b>		
• Public Management	Public entity manages day-to-day operations within the park. Typically, one full-time person manages the park and responds to tenant requests. Additional support staff from the public entity are used on a part-time basis.	<ul style="list-style-type: none"> <li>• County incurs overhead costs associated with retaining a full-time staff person to oversee management.</li> <li>• Potential for tenant concern over inexperience of the public employee to effectively respond to their needs.</li> </ul>
• Private Management	Private organization either retained by the property owner and/or developer to manage day-to-day operations within the park.	<ul style="list-style-type: none"> <li>• Previous experience of management team can be a valuable market tool for tenant attraction.</li> <li>• Perception that response to tenant needs will be expedient.</li> </ul>
• Public / Private Management	Advisory Board comprised of park tenants, public representatives and the area economic development corporation. Board approves building designs and guarantees compliance with CC&Rs.	<ul style="list-style-type: none"> <li>•</li> </ul>
<b>Location of Management</b>		
• Off-Site	If publicly owned and operated - a full-time public employee which acts as a liaison between the tenants and government; the individual responsible for responding to tenant needs. If privately owned and operated - a full-time individual or company retained to respond to tenant needs.	<ul style="list-style-type: none"> <li>• Management can be located in existing space, off-site, reducing overhead costs associated with on-site offices.</li> <li>• Centralized marketing and management can provide for more communication among the project managers and allow for streamlined efforts.</li> </ul>
• Full-Time On-Site	Similar to the management role described above, however located in an office within the park.	<ul style="list-style-type: none"> <li>• Provides direct access to management by tenants.</li> <li>• Allows for quick response to facilities related issues.</li> <li>• Provides an additional level of comfort to tenants.</li> <li>• Confirms for tenants and the community, the commitment level of the development entity to the project.</li> </ul>



**TABLE 5: STRATEGIC IMPLEMENTATION PLAN - FUNDING MECHANISMS**

Options	Definition	Implications
<ul style="list-style-type: none"> <li>Traditional Financing</li> </ul>	Capital for infrastructure from traditional lending sources including: banks, savings and loans, credit unions. In specific instances, loans can be government guaranteed.	<ul style="list-style-type: none"> <li>Lower loan-to-value ratios.</li> <li>Higher interest rates.</li> <li>Strict underwriting criteria.</li> </ul>
<ul style="list-style-type: none"> <li>Assessment Districts:                             <ul style="list-style-type: none"> <li>Municipal District</li> <li>TIF District</li> </ul> </li> </ul>	<p>Entity established to perform specific functions with ad valorem and other taxes (i.e., sales, excise, etc.). Funds may be used for projects. Amount of funding depends on base and formula.</p> <p>"Method of funding public investments in an area slated for redevelopment by recapturing, for a time, all or a portion of the increased tax revenue that may result if the redevelopment stimulates private investment."</p>	<ul style="list-style-type: none"> <li>Potential for public opposition.</li> <li>Use of funds restricted by municipal mandates.</li> <li>Property taxes from project are used to finance land acquisition and utility installation.</li> <li>Nontaxable government ownership makes a TIF unworkable.</li> <li>Can encounter public opposition, i.e., school districts.</li> </ul>
<ul style="list-style-type: none"> <li>Public Grants and Programs:                             <ul style="list-style-type: none"> <li>EDA Grant</li> <li>State Matching Grants</li> </ul> </li> </ul>	<p>Granted money from the Economic Development Administration for municipalities developing projects for the revitalization and diversification of their economic base.</p> <p>State grant program which provides in-kind money to new and expanding business and industry.</p>	<ul style="list-style-type: none"> <li>Free money.</li> <li>Public endorsement.</li> <li>County benefits from marketing efforts by funding agency. (Increases awareness at the State level.)</li> </ul>
<ul style="list-style-type: none"> <li>Municipal Utility Funds</li> </ul>	Capital reserve account whose revenue is generated from municipal fees.	<ul style="list-style-type: none"> <li>Sound method of financing, as proven in other communities.</li> <li>Amount of total funds fluctuates over time.</li> <li>Potential for opposition from Board for use of funds. (In the case of publicly owned and operated utility companies.)</li> </ul>

**TABLE 6: STRATEGIC IMPLEMENTATION PLAN PARK IMAGE**

Options	Definition	Implications
<ul style="list-style-type: none"> <li>Airport Affiliated</li> </ul>	<p>Industrial and/or business park either affiliated to an airport indirectly: by using the term "airport" in their name (a typical practice when the park is in close proximity to the region's airport facility); or directly: when the airport authority owns and operates the park.</p>	<ul style="list-style-type: none"> <li>Valuable marketing tool for business recruitment.</li> <li>When the airport authority participates as an owner there can be restrictions on the tenant mix.</li> </ul>
<ul style="list-style-type: none"> <li>County (Public) Business Park</li> </ul>	<p>Industrial and/or business park either affiliated to a public entity (i.e., county, city, etc.) indirectly: by using the municipality in the name; or directly: when the public entity owns and operates the park.</p>	<ul style="list-style-type: none"> <li>Potential for public perception that government is competing with the private sector.</li> <li>Revenue from the project can be funneled into other public works projects.</li> <li>Opportunity for government to play a role in industry attraction and job creation.</li> </ul>
<ul style="list-style-type: none"> <li>University Research Park</li> </ul>	<p>Industrial and/or business park affiliated with an area university. In effect, a location which clusters government, industry and university. The park provides a link between corporations and universities.</p>	<ul style="list-style-type: none"> <li>Locational opportunity for technology transfer.</li> <li>Shared management.</li> <li>Tenant access to university resources.</li> <li>Valuable marketing tool for business recruitment.</li> <li>"Boom to free market system and a conduit for the emerging global economy."</li> </ul>
<ul style="list-style-type: none"> <li>Private Mixed-Use Development</li> </ul>	<p>Privately owned and operated park facility featuring a mix of different land uses and activities.</p>	<ul style="list-style-type: none"> <li>Enhanced potential for attracting larger credit-worthy employers.</li> <li>Increased potential for higher-end users.</li> <li>Enhances success of on-site retail.</li> <li>Experienced mixed-use developers are able to create a synergy among various land uses.</li> <li>Potential for shared infrastructure i.e., parking.</li> </ul>

**TABLE 7: STRATEGIC IMPLEMENTATION PLAN - MARKETING STRATEGIES**

Options	Definition	Implications
<b>Marketing Entity</b>		
• Missoula Area ED Corporation	Coordinate marketing of the park with the business recruitment efforts of the ED Corporation. As a public/private corporation, the ED Corporation must market all potential sites within the County. Thus, the park would be competing with private developments.	<ul style="list-style-type: none"> <li>• Limited outlay of capital for business attraction.</li> <li>• Less than 100 percent marketing effort for park developer.</li> </ul>
• Full-Time Broker	Full-time public employee or private real estate broker hired to sell or lease sites within the park.	<ul style="list-style-type: none"> <li>• Focuses marketing efforts directly to the park.</li> </ul>
• Part-Time Broker	Independent real estate broker hired to market the park, in addition to other sites within the County.	<ul style="list-style-type: none"> <li>• Shares marketing effort with other industrial and park sites.</li> </ul>
<b>Marketing Tools</b>		
• Coordinated Effort w/ State	Provide State Economic Development representatives with information on the park and the market's economic and demographic profile.	<ul style="list-style-type: none"> <li>• This will heighten the awareness of state representatives to the existence of the park, positioning Missoula as a location for new business and/or industry opportunities.</li> </ul>
• Direct Mail	Viable companies within identified industry groups are contacted by mail regarding the availability of the park and its features.	<ul style="list-style-type: none"> <li>• Expensive method of targeting potential tenants. Success of this method is dependent on the status of businesses on the mailing list.</li> </ul>
• Audio-Visual	Prepare a video of the park and Missoula area, highlighting the locational advantages, stressing its quality-of-life, skilled labor force, educational system and transportation infrastructure.	<ul style="list-style-type: none"> <li>• Creative marketing tool to attract potential tenants from outside of the region.</li> <li>• Illustrates sophisticated, aggressive "pro-development" attitude of the County.</li> </ul>
• Brochures	Prepare brochure on the park, including its location within the state and region; cost of building sites; availability of utilities; amenities; other tenants; incentives (if applicable); and market area data.	<ul style="list-style-type: none"> <li>• Mandatory tool for effective marketing of the park, regardless of the development entity. Piece <u>must</u> be professionally prepared.</li> </ul>
• Trade Journals	Advertisement in corporate and business sitting magazines.	<ul style="list-style-type: none"> <li>• Method typical of economic development corporation. Additional efforts should be coordinated.</li> </ul>
• Industry Response Program	Established system of mechanisms and materials which are responsive to industry inquiries regarding location within the park.	<ul style="list-style-type: none"> <li>• Such an effort should be established cooperatively by the park management and marketing team and local economic development corporation.</li> </ul>

## TABLE 8: STRATEGIC IMPLEMENTATION PLAN - AIRPORT INCENTIVES

Options	Definition	Implications
<ul style="list-style-type: none"> <li>Free Trade Zone</li> </ul>	<p>Designated areas which promote international trade and provide tax relief for industry. The majority of these zones offer a well-developed transportation network in order to accommodate manufacturing and distribution companies attracted to a free trade zone.</p>	<ul style="list-style-type: none"> <li>Goods can be manipulated or stored on site with no import tax or duty paid until the goods leave the zone.</li> <li>Companies pay lower insurance and financing costs because assessment is based on value of merchandise and freight costs.</li> <li>Foreign traders can bring goods through a zone and ship within the country without paying United States duties.</li> </ul>
<ul style="list-style-type: none"> <li>Land Write-Downs</li> </ul>	<p>Reduction, below market rate, in the sale price of park sites to tenants. Amount of reduction can be commensurate with level of employment or other factor which measures their contribution to the local economy.</p>	<ul style="list-style-type: none"> <li>Valuable marketing tool for business recruitment.</li> <li>Potential for negative public perception regarding market competition by government with the private sector.</li> <li>Incentive must be carefully quantified to ensure that the benefits out-weigh the cost to provide it.</li> <li>Incentives must be equitably distributed.</li> </ul>
<ul style="list-style-type: none"> <li>Tax Free Land</li> </ul>	<p>Building sites within the park would be considered exempt from paying property taxes.</p>	<ul style="list-style-type: none"> <li>Valuable marketing tool for business recruitment.</li> <li>Potential for negative public perception regarding market competition by government with the private sector.</li> <li>Incentive must be carefully quantified to ensure that the benefits out-weigh the cost to provide it.</li> <li>Incentives must be equitably distributed.</li> </ul>
<ul style="list-style-type: none"> <li>Low Interest Loans</li> </ul>	<p>Public loan fund with preferred interest rates.</p>	<ul style="list-style-type: none"> <li>Valuable marketing tool for business recruitment.</li> <li>Potential for negative public perception regarding market competition by government with the private sector.</li> <li>Incentive must be carefully quantified to ensure that the benefits out-weigh the cost to provide it.</li> <li>Incentives must be equitably distributed.</li> </ul>

**TABLE 8: STRATEGIC IMPLEMENTATION PLAN - TENANT INCENTIVES – CONTINUED**

Options	Definition	Implications
<ul style="list-style-type: none"> <li>Graduated Lease Payments</li> </ul>	Public financing with a schedule of payments which increases over the duration of the loan. Graduated lease program can be applicable for both land and building financing.	<ul style="list-style-type: none"> <li>Valuable marketing tool for business recruitment.</li> <li>Potential for negative public perception regarding market competition by government with the private sector.</li> <li>Incentive must be carefully quantified to ensure that the benefits out-weigh the cost to provide it.</li> <li>Incentives must be equitably distributed.</li> </ul>
<ul style="list-style-type: none"> <li>Publicly Subsidized</li> </ul>	Public financing for tenant site infrastructure, capital improvements and equipment financing.	<ul style="list-style-type: none"> <li>Valuable marketing tool for business recruitment.</li> <li>Potential for negative public perception regarding market competition by government with the private sector.</li> <li>Incentive must be carefully quantified to ensure that the benefits out-weigh the cost to provide it.</li> <li>Incentives must be equitably distributed.</li> </ul>
<ul style="list-style-type: none"> <li>Revolving Loan Fund</li> </ul>	Public loan fund for private industry.	<ul style="list-style-type: none"> <li>Valuable marketing tool for business recruitment.</li> <li>Potential for negative public perception regarding market competition by government with the private sector.</li> <li>Incentive must be carefully quantified to ensure that the benefits out-weigh the cost to provide it.</li> <li>Incentives must be equitably distributed.</li> </ul>
<ul style="list-style-type: none"> <li>Coordinate w/ Jobs Training Program</li> </ul>	As planned, the park will include a community educational facility, providing education and job training to park tenants.	<ul style="list-style-type: none"> <li>Valuable marketing tool for business recruitment.</li> <li>Potential for negative public perception regarding market competition by government with the private sector.</li> <li>Incentive must be carefully quantified to ensure that the benefits out-weigh the cost to provide it.</li> <li>Incentives must be equitably distributed.</li> </ul>

**TABLE 9: STRATEGIC IMPLEMENTATION PLAN - PARK AMENITIES**

Options	Definition	Implications
<ul style="list-style-type: none"> <li>• Restaurant</li> </ul>	Free-standing pad sites located along commercial corridors; tenant within a commercial retail business center or tenant within office building.	<ul style="list-style-type: none"> <li>• Greater positive impact on park development if associated with other retail users.</li> </ul>
<ul style="list-style-type: none"> <li>• Business Support Services                             <ul style="list-style-type: none"> <li>• Computer Repair</li> <li>• Copying Services</li> <li>• Machinery Repair</li> <li>• Etc.</li> </ul> </li> </ul>	Commercial retail business center with several tenants which support development park businesses.	<ul style="list-style-type: none"> <li>• Enhances "mixed-use" character of park.</li> <li>• Enhances marketability of park to potential tenants.</li> </ul>
<ul style="list-style-type: none"> <li>• Day Care</li> </ul>	Free-standing pad sites; tenant within a commercial retail business center or tenant within office building. Center may be publicly subsidized, privately owned and operated or financed through contributions from park tenants.	<ul style="list-style-type: none"> <li>• Enhances marketability of park to potential tenants.</li> </ul>
<ul style="list-style-type: none"> <li>• Open Space</li> <li>• Recreational Amenities</li> <li>• Water Features</li> </ul>	Non-income producing amenities which enhance the image and marketability of the park.	<ul style="list-style-type: none"> <li>• Enhances "mixed-use" character of park.</li> <li>• Enhances marketability of park to potential tenants.</li> </ul>
<ul style="list-style-type: none"> <li>• Hotel</li> </ul>	Privately owned and operated hotel within the property which will support the business of park tenants, as well as benefit from a location proximate to a major highway system.	<ul style="list-style-type: none"> <li>• Enhances "mixed-use" character of park.</li> <li>• Enhances marketability of park to potential tenants.</li> </ul>