

Uinta and South Lincoln Counties Target Industry Implementation Plan

Uinta & South Lincoln Counties, WY
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Compiled by
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1. INTRODUCTION

Background

Uinta and South Lincoln Counties (USLC) in Southwest Wyoming have a strong economic foundation benefitting from various industries, economic centers in Evanston and Kemmerer, natural assets, the State of Wyoming and the Wyoming Business Council's resources, and a strong logistical advantage served by I-80 and close access to the Salt Lake City Metropolitan Statistical Area ("MSA"). In 2018, South Lincoln County Economic Development Corporation and the Uinta County Economic Development Commission – with guidance from regional economic development leaders – secured a grant from the Wyoming Business Council to establish a Regional Target Industry Implementation Plan, or now known as the Southwest Wyoming Target Industry Implementation. The intention for this great regional effort was to develop a resource that will prepare the economic development leaders in USLC for streamlined implementation of economic development. The emphasis was on clear direction to determine who to target (through the Target Industry Analysis) and how to target (the Economic Development Programmatic Enhancements and Target Industry Implementation). Additionally, this effort required the development of a foundation for a new regional economic development brand for South Lincoln and Uinta Counties – one that could now be known as the Wasatch Frontier.

Acknowledgements

Many individuals have contributed to the development of the Uinta and South Lincoln Counties Target Industry Implementation Plan. We would like to acknowledge the Steering Committee, Boards, Lead Economic Development Staff, and Regional Partners who have demonstrated outstanding leadership in undertaking this process. The implementation plan would not have been possible without these leaders. We offer a special appreciation and acknowledgement to the following individuals:

Steering Committee

- Brent Hatch
- Owen Petersen
- Eric Mander
- Tib Ottley
- Mieke Madrid
- Andrew Nelson
- Elaina Zempel

South Lincoln County Economic Development Corporation

- Teresa Frommel, Branch President – 1st Bank
- Ron Wild, Regional Business Manager – Rocky Mountain Power
- Teresa Chaulk, Superintendent - Lincoln County School District #1
- Alyssa Hartmann, Town Clerk – Town of Diamondville
- Brian Muir, City Administrator – City of Kemmerer
- Jack Walkenhorst — All West Communications

Uinta County Economic Development Commission

- Brian Stokes
- Brent Hatch
- Owen Petersen
- Mark McGurn
- Craig Welling
- Dan Wheeler
- Tib Ottley
- Monica Streeter (in memoriam)

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- Mieke Madrid, Community Development Coordinator – City of Evanston
- Brian Muir, City Administrator – City of Kemmerer
- Andrew Nelson, Former City Administrator – City of Kemmerer

State Partners

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- Amy Grenfell, Chief Operating Officer – Wyoming Business Council; Former City Administrator – City of Evanston

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- Brittany Hicks, Graphic Designer – Thomas P. Miller & Associates
- Brock Naylor, Graphic Designer – Thomas P. Miller & Associates
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Local Stakeholders Interviewed

- Mike Pexton
- Dave Bassett
- Steve Russell
- Kim Proffit
- Dave Crofts
- Dave Huggins
- Emily Huggins
- Ben Critchfield
- Brent Sanders
- Jacque Skog
- Paul Skog



2. EXECUTIVE SUMMARY

Overview

Thomas P. Miller & Associates (“TPMA”) in partnership with Destination by Design (“DbD”) were selected to lead the development of the Uinta and South Lincoln Counties Target Industry Implementation Plan. The Project Team implemented a concerted process of assessing socioeconomic data, integrating leadership and community priorities, conducting a Target Industry Analysis, enhancing Economic Development programs, and designing implementation plans for industry targets to focus economic development efforts in Uinta and South Lincoln Counties (USLC).

As has been noted by TPMA throughout this process, the intention of this analysis is to provide regional economic development personnel and entities with information and strategies that will enhance the regional economy, and not detract from it. As has been shown over and over again in regional economic development, when regions augment their economies by adding more businesses within existing industry clusters, there is a net increase in economic activity and jobs, and most existing businesses benefit from these efforts.

The report is structured to include the most essential information at the beginning, in descending order of importance. Chapter 1 is a summary of the project background and reiteration of the selected target industries. Chapter 2 is an executive summary of all facets of TPMA’s report. Chapter 3 includes TPMA and DbD’s Economic Development Brand Platform and other associated marketing information.¹ Chapter 4 contains TPMA’s recommendations for economic development programming to support the suggested target industries. In Chapter 5, TPMA provides a detailed Target Industry Implementation Outline for eight of the identified 22 target industry opportunities, connecting each opportunity summary with specific site selection consultants, business recruitment opportunities, and industry conference opportunities. The industry opportunity summary for the remaining 14 opportunities is provided in the Target Industry Opportunities section (Chapter 6). TPMA’s detailed socioeconomic research is summarized in Chapter 7, Research & Inventories Analysis. Chapter 8 includes numerous appendices with reference material, detailed data tables, and definitions.

The crux of the Uinta and South Lincoln Counties Target Industry Implementation Plan is the identification of target industries which are aligned with the needs and resources of the region. TPMA produced the Target Industry Analysis and engaged regional Economic Development staff leaders and the Steering Committee to produce the targets seen below. TPMA identified 21 target industry opportunities categorized in one of three ways: industrial, service, or tourism. In the lists below, the most significant opportunities, and also those highlighted in Chapter 5, are in bold font.

¹ Please note, Uinta County representatives were emailed separate images and documents containing suggested logos, colors, and design standards.

Industrial Target Industry Opportunities

- **Blockchain Processing Facilities**
- **Downstream Chemical Products Manufacturing**
- **Wind Turbine Manufacturing**
- **Aerospace Parts Manufacturing**
- **Mining Machinery and Oil & Gas Machinery Manufacturing**
- Highway & Infrastructure Construction
- **Firearms & Ammunition Manufacturing**
- Solid Waste Collection, Storage and Combustion

Service Industry Opportunities

- **Back Office Services**
- Retirement Communities
- Outdoor Recreation Retail & Rental
- Computer Systems Design Services
- Long-Haul Trucking Services
- Expansion of Higher Education in Evanston
- Coworking Space
- Automotive Repair Shop
- Expansion of Local Services
- Expansion of Local Retail

Tourism Industry Opportunities

- Fossil Hunting Tourism
- **Boutique Hotel**
- National Chain Hotel

Report Highlights

The following Target Industry Implementation report contains numerous insights, statistics, and conclusions that are best understood by reading each section in its entirety. The following are some of the most significant components of this report.

Though Uinta County and Lincoln County are separate entities, fostering a successful economic future requires that staff, board members and elected officials embrace a “regardless of borders” mentality when it comes to economic development. There are numerous initiatives, strategies and target industries the region can address using these policies. TPMA foresees the demand for growing local business through entrepreneurship and recommends a program tentatively titled **(Intelligence Southwest Wyoming) iSWWY**, which would provide entrepreneurial support services in tech-related and other industries. There are significant opportunities to recruit businesses to the area through intentional **business attraction**, and as such, TPMA recommends that the region determine which person or organization will take responsibility for these efforts and work through the target industry opportunities identified above. As a final component to USLC’s economic development strategy, a **business retention & expansion (BRE) program** should be established which maintains connection with important regional businesses, establishes processes and routines, and manages a database related to local business needs.

In the course of this project, **numerous high-potential development sites** were identified in Uinta and South Lincoln Counties, which offer an assortment of advantages for industrial, service, and tourism businesses. In addition, **19 qualified site selection consultants** were identified with experience in fields appropriate for USLC. In addition, TPMA curated **16 businesses** that could be approached for business recruitment. Lastly, **23 conferences and events** to be hosted in 2019 and 2020 are outlined which could provide strong business attraction connections and opportunities for USLC.

Uinta and South Lincoln Counties offer unique advantages to certain industry sectors. To explain a few in greater detail:

- Wyoming is positioned to be the United States leader in **Cryptocurrency and Blockchain Processing**. In addition to the state’s regulatory advantages, USLC offers affordable land, very affordable energy and proximity to major cities through Salt Lake City International Airport.
- USLC is positioned to compete in **Downstream Chemical Products Manufacturing** due to presence of existing businesses, existing transportation lines, and a clustering of over 1,300 jobs within the trade radius area.
- Wind energy is booming in Wyoming due to recent and planned installations of major power plants, including several in Uinta County. A local producer of large tow carbon fiber, Evanston Mitsubishi Chemical Carbon Fiber and Composites, represents a major asset in the attraction of **Wind Turbine Manufacturing** to the area.
- The USLC trade radius area, which includes the Salt Lake City metro area, is among the nation’s leaders in **Aerospace Product & Parts Manufacturing**. Given the appropriate cultivation of industry relationships, existing businesses in USLC could tap into subcontract opportunities for such business, or new businesses could be attracted to the region.
- Uinta and South Lincoln Counties have historically excelled at mining of mineral and energy products but have not capitalized on upstream supply chain manufacturing in the form of

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Mining Machinery & Oil & Gas Machinery Manufacturing. Local workforce knowledge of these industries and products could help attract such business from the Southeast and Midwest United States.

- The growth of **Firearms & Ammunition Manufacturing**, nationally and especially in Wyoming, presents an opportunity that fits with the Western culture and interests of USLC.
- The existence of professional, technical, and scientific services within USLC is currently thin, but **Back Office Services** such as telemarketing, document prep, and payroll services, could represent a natural first step in industry diversification. The prominence of such industries across the Utah border creates the opportunity to recruit business within the trade area looking to expand in places with lower or equal wages.
- The City of Evanston is located among countless natural amenities and resources that could result in further tourism traffic. The existence of a **Boutique Hotel** in Evanston could initiate the process of increasing existing hospitality assets for USLC.

Lastly, there are numerous economic and demographic trends that regional leaders should be aware of, the most important of which are as follows:

- USLC have an aging population that is becoming slightly more diverse with time. The majority of this population possesses at least a high school degree.
- Uinta and Lincoln Counties are slight net exporters of commuters. However, the vast majority of workers (12,956) both lived and worked within the counties.
- In 2016, Uinta County contracted minorly due to outmigration. Conversely, Lincoln County expanded. In net, Uinta County decreased by 22 tax payers and Lincoln County increased by 135.
- The top five largest industries in USLC, based on 2017 jobs include: Government; Retail Trade; Health Care and Social Assistance; Mining, Quarrying, and Oil and Gas Extraction; and Accommodation and Food Services.
- Workers that most commonly live in USLC and out-commute for work include: Office and Administrative Support Occupations, Transportation and Material Moving Occupations, and Construction and Extraction Occupations.
- The workforce analysis finds that about half (50%) of high-demand jobs in the region typically require a high school diploma or less, and approximately 64% of high-demand jobs require some type of training, which is typically on-the-job training.



3. ECONOMIC DEVELOPMENT BRAND PLATFORM

Brand Development Process

The Project Team conducted a comprehensive brand development process that included stakeholder engagement through interviews, a branding workshop, and brand surveys to inform the branding of the region encompassing Uinta and S Lincoln Counties. Through a total of 11 in-depth interviews and 67 survey responses², the Project Team constructed a comprehensive Brand Platform and Visual Identity for the region, dubbed the Wasatch Frontier, that illustrates the diverse economy, affordable prices, and a downtown that is prepped for growth.

Brand Platform for the Wasatch Frontier

POSITIONING STATEMENT

Just 90 minutes along I-80 from downtown Salt Lake City (SLC), and 1 hour from the epicenter of the High Uintas Wilderness, Southwest Wyoming's (SWWY) location is only part of what makes us wired for growth. From our rich history as the settlers of the Bridger Valley, to our role in establishing the Transcontinental Railroad, which still crowns downtown in the form of the Evanston Historic Roundhouse and Railyards, SWWY exemplifies the past, present, and future of the great Wyoming spirit. With our commitment to preserving access to the outdoors as a means of enhancing quality of life, and dedication to business-friendly policies. The opportunity here is as expansive as the landscape.

Objective

This brand provides a platform for communicating why SWWY is a great place to live and do business.

Audience

People who love wide open places, who want to live NEAR, but not WITHIN the Wasatch Front, and for businesses searching for a well-located, yet still affordable place to invest.

Goals

1. Position SWWY as the next frontier of expansion for the Wasatch Front.
2. Increase awareness of the unique qualities and benefits of SWWY among Wasatch Front citizens.
3. Attract entrepreneurs, executives, and specific target industries through the combined benefit offerings of low taxes, affordable real estate, and exceptional quality of life.

Essence

The untamed spirit of the West is alive and well in Southwest Wyoming (SWWY). The SWWY brand essence should reinforce and reflect that of the state-level "That's WY" campaign, but with a customized slant towards business and commerce:

Find Your Own Piece of Possibility; Where Freedom Is a Way of Life & Business; Opportunity as Expansive as the Landscape.

² Interview participants are listed in the Acknowledgements section of Chapter 1. Introduction.

Positioning Summary

- SWWY's most unique selling proposition is our diverse economy combined with affordable prices, low taxes, and a downtown that is prepped for growth.
- SWWY should be positioned as an "Expansion District" for the Wasatch Front, with "great bones", and an established infrastructure prepared for business growth.
- Just close enough to enjoy the fruits of one of America's fastest growing regions, but with plenty of room to breathe and a distinctively "untamed spirit".

Our Promise

- Our strategic location: 90 minutes along I-80 from the Wasatch Front, combined with our business-friendly policies, make SWWY an optimal location for business expansion.
- Downtown Evanston, a nationally acclaimed historic Main Street, and its traditional walkable core, is primed to become a destination for visitors, as well as a hub for living and working in the Wasatch Front.
- Our storied history as the original pioneers, traders, explorers, and miners of the Wild West help maintain the untamed spirit of the Cowboy State.

Story Branding

By telling the stories of locals and businesses who have chosen to make SWWY their home, or who have chosen to relocate here, a SWWY campaign could attract like-minded entities who are in search of a new place to expand.

Stories along the following themes should help establish SWWY's identity as a Wasatch business expansion zone, but also as an attractive alternative to the hustle and bustle of the Wasatch Front.

Theme Identification

Location, Location, Location

Historically, every major route to the West passed through Uinta and Lincoln counties, including the Oregon and California Trails. Today we just call it I-80, which cuts straight through downtown Evanston and can take you to downtown SLC in 90 minutes.

Our proximity to the Wasatch Front provides us access to one of America's fastest growing metros balanced with a strong quality of life.

Business Friendly

No corporate income tax, no personal income tax, no inventory tax, no tax on goods-in-transit or made for out-of-state sale. Our property and sales taxes are among the lowest in the nation and our commercial property rates and utility costs are far below national average.

Our real estate is affordable, with plenty of room to build, and competitive land prices.

Outdoor Recreation & Tourism

SWWY is both a destination and gateway to the splendor of the natural wonders of the region. Assets such as the High Uintas Wilderness, Flaming Gorge, the Green River, Bear Lake, the Hams Fork River, and Bear River State Park with the Bear River Greenway & Rio Oso bike trails providing a solid network to build upon.

SWWY also has world class heritage tourism assets, such as Fort Bridger Historic Site, with its Mountain Man Rendezvous Festival, Fossil Butte National Monument- one of the world's largest and best-preserved fossil deposits, plus the Evanston Historic Roundhouse and Railyards with its rich and meticulously preserved rail history.

Downtown Evanston

Downtown Evanston, a nationally acclaimed historic Main Street, and its traditional walkable core, is primed to become a destination for visitors, as well as a hub for those living and working in the Wasatch Front.

Evanston's dedication to historic preservation and the revitalization of its downtown-particularly that of the Evanston Historic Roundhouse and Railyards has earned it a semifinalist nod for a prestigious national award from the National Main Street Center.

Visual Samples

Logo Designs

The Wasatch Frontier Brand

The Wasatch Frontier Logo was drafted with the landscape of the region being the obvious focus. Because of the draw of the Region as recreational destination – a place fit to explore – it is important that the branding reflects and highlights that draw.

The name itself is also indicative of a region ripe for exploration – *The Wasatch Frontier*. The word “Frontier” in this context implies the untapped potential of the region; whether recreational, industrial, or economic, the Wasatch Region truly is an exciting *Frontier* in all respects.

The visual identity of the logo was built with the following usage consideration:

- Effective in color and monotone format
- Bold, robust serif type is strong, rugged
- Draws from a ‘western sunset’ appeal – illustrates the ‘frontier’ element
- Incorporates identifiable landscape elements of the region
- Defined shape allows for ease of use in many applications



Targeted Advertising



Target Industry Profiles



BLOCKCHAIN PROCESSING FACILITIES

NAICS CODES: 522320: Financial Transactions Processing, Reserve, and Clearinghouse Activities; 518210: Data Processing, Hosting, and Related Services

Over the past ten years, blockchain processing has gone from being an obscure obsession of computer scientists, to a national priority, to an industry ripe with opportunity to transform e-commerce and cyber security. Part of this transformation includes the recognition by financial industry insiders, that blockchain processing, the technology behind cryptocurrency mining, can be adapted to serve a limitless number of other industries. The most obvious application is in FinTech (a combination of finance and technology) but other potential applications include cybersecurity, government, transportation, and healthcare.

In many ways, blockchain processing facilities are effectively the same as data centers. The site fundamentals to serve blockchain processing are all in place in Uinta and South Lincoln Counties, including ultra-low energy costs (especially in close proximity to the Naughton plant), moderate to low temperatures, access to broadband internet, and accessibility of affordable real estate. The strong assets of Wyoming are borne out in industry performance over the past five years. Though still small in number, employment in Data Processing, Hosting, and Related Services increased in Wyoming by 31% over the past five years. In addition, recent regulatory changes by the Wyoming State government, make Wyoming a particularly attractive location for cryptocurrency entrepreneurs. Though the details of the bill are arcane, the upshot is that Wyoming is offering legal status to digital tokens and exempting them from state property taxes, both steps that no other state has taken thus far.

The potential impact of this regulatory change cannot be overstated. Many cryptocurrency companies operate in a legal grey area, where it is never certain how regulators may intervene into business operations. When governments do step in to create rules, they have often been too burdensome or complex for companies to comply. For instance, in 2015, when New York State articulated its cryptocurrency laws, requiring businesses to ac-

quire a "bit license" all investment and business activity in this sector effectively halted. The latest reports indicate that only four businesses, out of the hundreds that were in the industry three years ago, have managed to acquire the license. States with large financial sectors, such as California and New York, are actively re-examining both cryptocurrencies and blockchain processing, so they can determine how government can better monitor these industries without being overly intrusive. The fact that Wyoming has already articulated its position, and it is considerably more open than other states, will give the state a window of opportunity in this sector.

New regulations have been successful at attracting businesses. Since the passage of HB 70 in March 2018, an influx of companies have registered in the Cowboy state at a pace, according to one source of "two to three crypto-related" companies per day. However, there are challenges for the state to compete in this space. First and foremost, Wyoming is nowhere near the institutional capital of finance within the United States. Other concerns are unique to the Southwestern part of the state. Much of the emphasis for this regulation spurred out of the state capital, and the Wyoming Blockchain Coalition, all of which have strong roots in the Western quarter of the state. This is indicated in industry activity as well, as nearly all of the state's current employment in Data Processing, Hosting, and Related Services is in Laramie County.



Strengths

- + Wyoming's HB 70: Utility Token Bill makes the state the most competitive in the nation for Cryptocurrency regulation
- + Electrical energy rate of 5 cents kWh
- + Ideal environmental location for data centers (i.e.: climate, lack of natural disasters)
- + Potential partnership with Wyoming Blockchain Coalition
- + Recent job loss in data center industry in Utah, could result in windfall in Wyoming

Challenges

- Requires connections with Cryptocurrency miners and/or corporate IT leaders
- IT Workforce needs could be hard to fulfill
- Requires adequate attention from state economic development representatives in eastern portion of Wyoming
- Distance from financial centers of activity

Company

B

Company

B

Potential Development Sites:

- 4. 1,000 Acres
- 2. Glencoe Junction Transload Facility
- 11. Naughton Plant

Potential Trade Shows/Conferences:

- Area Development
- International Economic Development Council (IEDC)
- Site Selectors Guild
- Society of Industrial and Office Realtors (SIOR)
- World Crypto Conference (WCC)
- Wyoming Economic Development Association (WEDA)
- South by Southwest (SXSW)

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4. ECONOMIC DEVELOPMENT PROGRAMMATIC ENHANCEMENTS

Economic Development Programmatic Strategy

The Economic Development Programmatic Strategy provides customized recommendations and strategies to strengthen the competitive position of Uinta and South Lincoln Counties to realize new job creation and capital investment. These strategies have been developed by synthesizing best practices in entrepreneurship, business attraction, and Business Retention & Expansion, and are representative of the work developed throughout the project.

Entrepreneurism

Entrepreneurial programming in USLC presents strong prospects for short- and long-term economic development. High-tech entrepreneurship presents an opportunity for USLC to diversify its portfolio of industries and expand upon the tremendous growth of high-tech industries in the area. This focus on low-impact and high-tech entrepreneurs may see the creation of start-up businesses with the potential to expand rapidly in USLC throughout the coming years. USLC should explore the formation of a business incubator to operationalize its efforts to accommodate and attract entrepreneurs. The incubator will be designed to support start-up businesses including those at the ideation stage all the way through established companies seeking support to advance to the next level of growth.

USLC will work with other public, non-profit, and private partners to form the business incubator under an exciting brand, tentatively named iSWWY (Intelligence Southwest Wyoming), marketed to the following groups:

- Southwest Wyoming entrepreneurs from diverse backgrounds providing a tech-related product or service
- Employees or organizations in the mineral, oil, and gas, and mining industries

iSWWY

iSWWY will offer entrepreneurial support services through public, non-profit, and private resources. Therefore, USLC will engage multiple partners in the formation of the incubator as a separate organization apart from any County or local government. Organizing iSWWY as a separate organization is advantageous to fully integrate private partners, private equity to invest in incubator graduates, grants, and public resources – including local government investment. When collaboration is helpful and warranted, iSWWY will work with other broader regional initiatives such as the Small Business Development Center (SBDC) in Rock Springs.

iSWWY will facilitate and promote entrepreneurship by offering startup companies in tech-related industries and those supporting mineral, oil, and gas, and mining industries shared facilities, resources, hands-on consulting support, business mentorships, product development services, marketing services, intellectual property research, and connections to potential seed financing. The incubator will require the funding of an Executive Director position to lead the program, work with entrepreneurs, and support the identification of a physical office. The iSWWY office will serve as the headquarters of the entrepreneurial community providing an ecosystem for diverse entrepreneurs to connect, share resources, and expand the knowledge economy of USLC.

iSWWY Incubator Services to be Provided

iSWWY will provide services to address the specific needs of the entrepreneurs in the program. The following list represents potential services.

- Business licensing and company formation advice
- Sales and marketing advice
- Accounting/financial advice (through a network)
- Legal advice (through a network)
- Mentors (through a network)
- Funding introduction (through a network)
- Ongoing business consulting
- Office space and resources
- Scheduled coaching sessions
- Business plan development/execution
- Social media advice
- Website advice

iSWWY Office and Resources

The Executive Director and the key founding partners of iSWWY will work together to identify an ideal, low-cost location for the program to be determined based on available assets and interest in participation. After several years of successful implementation, it is possible that the office can be expanded to include a co-working space (which is one of the identified target opportunities in this Plan) and coding programs for secondary, post-secondary, and adult entrepreneurs or those that are looking to expand their technical skills. Facilities and resources available to the entrepreneurs may include:

- Furnished office space
- Conference room
- Shared office equipment including phone, high-speed broadband, video conferencing, copier, printer, fax, and more
- Basic office supplies
- Parking on site
- Mail service
- Break room service
- Janitorial service
- Social events

Criteria for New Entrepreneurs in iSWWY:

iSWWY will be an inclusive high-tech incubator, focused on attracting diverse and talented individuals or teams to work with the program, Executive Director, and USLC partners to launch or expand their business in the region.

Ideal entrepreneurs and teams will develop high-tech businesses with the potential to expand in USLC.

Entrepreneurs or Teams Must

- Be a for-profit business in a high-tech field or primary industry
- Have a product or service that can be commercialized
- Demonstrate a strong market for products or services
- The company should intend to remain in USLC
- Have a basic business plan
- Agree to meet at least twice a month with their team and Executive Director

Strategies for Entrepreneurism

- Establish the Organization for iSWWY, Including Hiring an Executive Director
- Develop a Formal Curriculum for iSWWY
- Attract and Organize Entrepreneurs in iSWWY into Cohorts
- Develop an Angel and Equity Network and Develop an Equity Fund for Seed Funding
- Leverage Established Relationships from the Private Sector to Commercialize Private Technologies Related to Existing Industries
- Develop a Business Startup and Service Online Handbook

Business Attraction

Business Attraction is focused on recruiting new companies to a community. Like consumers, businesses have a choice in who they procure products or services from, who they partner with, and where they operate. This free market model is a cornerstone of economic development, as it encourages healthy competition. This in turn can enable a community to recruit businesses that provide quality jobs, bring capital investment, provide government revenue, diversify the industry base, and support philanthropic causes. Increasing the primary industry business base supports a community's overall sustainability and vibrancy.

Business attraction comes in several forms. Some businesses choose to partially or completely relocate or consolidate to a new location. There are a variety of factors that may cause a business to consider relocation or consolidation. These may include operational costs, workforce, customer proximity, transportation and logistics, and quality of life. Another form of business attraction may not result in the loss of operations and jobs at an existing location. As companies innovate, they may require new operational footprints to bring new products to market. These factors may include existing operational capacity restraints, proximity to key customers or markets, or business models that require a lower cost of business than existing operations within a company's footprint.

There are a variety of tools and strategies that are employed to successfully win business attraction projects. Many companies with a moderate-to-substantial attraction project hire a site selection consultant to guide the business through the process of eliminating geographies – and eventually specific sites – from consideration, to ultimately select a new site for operations. Site selection consultants use or acquire objective industry, workforce, socioeconomic, geographic, real estate, and operational cost data to help guide the process of elimination. The consultants and prospects often complement the objective data with qualitative discussions with business executives and other relevant leaders in the community.

Site selection consultants often work with their clients to negotiate incentives, financing, and workforce development training to maximize their project and leverage their up-front investment costs. Therefore, economic development organizations must have a robust program to adequately and efficiently engage site selectors and prospects – both in a proactive business development setting and reactively when responding to requests for information ("RFIs"). Further, economic development departments or organizations must have access to competitive incentives that are attractive to prospects but that ultimately provide a net benefit to the community and state. Finally, but not to be considered exhaustive, successful traditional public relations, media, and social media tools can evolve an image of a community over time. These strategies emphasize objective selling points such as a community's industry clusters or workforce strengths. Further, they can positively position subjective factors such as championing a community's vibrancy and culture. These strategies have great potential to control a community's narrative and support attraction efforts.

USLC has a great opportunity to enhance Business Attraction programming and win new attraction projects through new or refreshed strategies. Business Attraction is important to the success and economic sustainability of USLC as it expands economic opportunity and the tax base. The following Business Attraction strategies have been developed through the alignment of the engagement process for this project and the integration of national best practices.

Strategies for Business Attraction

- Continued Alignment with Local, Regional, and State Economic Development Partners
 - The regional perspective – “regardless of borders” mentality is positive and should be encouraged
- Assess Marketing Tools
 - Traditional, social, and guerrilla
- Site Selector Engagement
 - USLC will research and analyze the extensive Site Selection Firms list found at the end of this Plan to strategize unique outreach opportunities in coordination with the Wyoming Business Council.
- Business Development Travel: Site Selector Forums and Trade Shows
 - In Appendix D of this report TPMA includes a recommended list of 23 relevant economic development, site selector, industry, or innovation forums and conferences occurring in 2019. The list has been developed to directly relate to the identified target industries. Please note, that TPMA understood that marketing budgets may not be able to accommodate all forum and conference opportunities.

Business Retention & Expansion (BRE)

As a critical component to any community's toolbox of economic development services, a Business Retention & Expansion ("BRE") program aids companies to facilitate growth and expansion leading to new jobs and capital investment. Further, a BRE program prevents companies from relocating or closing. The primary objective of a BRE program is to identify and address the needs of businesses and is accomplished through sustained relationships and data collection. This allows USLC to better align policies, investments, and economic development efforts with its business clients.

There are a variety of ways to create, update, and implement a BRE program. USLC is already undertaking an informal BRE effort and the consulting team is impressed with the relationships and efforts to accommodate and grow the existing business base. The following recommendations are offered to validate or enhance USLC's BRE efforts already in place.

USLC will continue to strengthen its BRE efforts to gather crucial intelligence, offer technical assistance, and help a variety of primary industry businesses to grow. Fundamentally, the USLC BRE program should position Economic Development leaders to be seen as a direct resource provider. This includes being a technical assistance provider, a broker of resources, and a business community advocate in relation to the business climate and associated policies and procedures of the counties, region, and State of Wyoming.

The USLC BRE Program should include the following elements:

- Comprehensive list of existing USLC primary industry businesses
- BRE program infrastructure (e.g. SOPs)
- Survey instrument to regularly collect, analyze, and track data on both the company and industry
- BRE database to house and analyze data and provide consultation to partners – USLC may consider a customer relationship management software (CRM)

Strategies for BRE

- Develop a Formal List of Existing Primary Industry Businesses in USLC
- Develop a Formal BRE Program Infrastructure / Standard Operating Procedures
- Prioritize BRE Visits
- Market the BRE Program and Services



5. TARGET INDUSTRY IMPLEMENTATION OUTLINES

Introduction

As explained in the introduction to this report, Chapter 5. Target Industry Implementation Outlines takes a sample of eight of the best industry opportunities for USLC and explains how each relate to regional economic development sites, recommended site selectors, potential companies to recruit and potential trade shows and conference. For the sake of brevity, only the names of the Potential Site Selectors to Engage; Potential Company Targets; and Potential Trade Shows / Conferences are included in this Chapter. Full details on each of the listed options are contained in Appendices B, C and D.

The selection of opportunities listed in Chapter 5 and Chapter six, as well as the order of opportunities within each group is based on the rankings of opportunity importance and feasibility according to TPMA's consulting team. Admittedly, reasonable minds could differ on the precise order of these options. TPMA wants to emphasize that each of the opportunities explained in this report are strong, but they do not proportion to carry the same impact to USLC. The selection of leads listed for each target industry are ordered alphabetically. The number and quality of jobs vary case by case, and TPMA has endeavored to rank order the opportunities in terms of both their feasibility and potential impact to the region.

Regional Site Maps

Potential development sites are mentioned throughout the Target Industry Implementation Outline. The following tables and figures can serve as a reference for the location of each site. Table 1 provides the index number utilized in the maps. Table 2 provides site specifics for each of the locations.

Table 1. Potential Development Sites in Southwest Wyoming

Site Number	Site Type	Property
1	Official Site / Building	Union Center Business Park
2	Official Site / Building	Evanston Historic Roundhouse and Railyards
3	Official Site / Building	Evanston's Rail Access Property
4	Official Site / Building	1,000 Acres
5	Official Site / Building	Hotel Evanston
6	Official Site / Building	Wyoming State Hospital Campus
7	Hypothetical Site	Glencoe Junction Transload Facility
8	Official Site / Building	Evanston-Uinta County Burns Field Sites
9	Hypothetical Site	Kemmerer Municipal Airport Sites
10	Hypothetical Site	Private Camping or Recreation Near Fossil Butte National Monument
11	Official Site / Building	Numerous Privately-Owned Commercial Properties

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Table 2. Site Specifics for Potential Development Locations

Site #	Name	Site or Building	Address	County	Size	Target Industry Category
1	Union Center Business Park	Sites	1600 Union Dr, Evanston, WY 82930	Uinta	140 acres with various sized plots	Industrial or Service
2	Evanston Historic Roundhouse and Railyards	Building	1500 Main St, Evanston, WY 82930	Uinta	50,000 SF (divisible at 15,000 SF)	Service
3	Evanston's Rail Access Property	Site	1200 Main Street, Evanston, WY 82930	Uinta	7.75 acres	Industrial or Service
4	1,000 Acres	Site	601 Bear River Dr, Evanston, WY	Uinta	1,000 acres	Industrial
5	Hotel Evanston	Building	1013 Front St., Evanston, WY	Uinta	22,924 SF	Service or Tourism
6	Wyoming State Hospital Campus	Sites & Buildings	831 WY-150, Evanston, WY 82930	Uinta	237.32 acres	Service or Tourism
7	Glencoe Junction Transload Facility	Site & Buildings	Country Road 111, Evanston, WY 82930	South Lincoln	6,400 sf truck maintenance building; 9,600 sf equipment building	Industrial
8	Evanston-Uinta County Burns Field Sites	Site	2160 Co Rd 111, Evanston, WY 82930	Uinta	14 acres	Industrial or Service
9	Kemmerer Municipal Airport Sites	Site	1326 Kemmerer Airport Rd, Kemmerer, WY 83101	South Lincoln	590 acres	Industrial or Service
10	Private Camping or Recreation Near Fossil Butte National Monument	Site	864 Chicken Creek Rd, Kemmerer, WY 83101	South Lincoln	N/A	Tourism
11	Numerous Privately-Owned Commercial Properties	Sites & Buildings	Numerous	Uinta & South Lincoln	N/A	Industrial, Service or Tourism

Figure 1. Southwest Wyoming Potential Development Sites (Full Map)



Figure 2. Southwest Wyoming Potential Development Sites in Uinta County

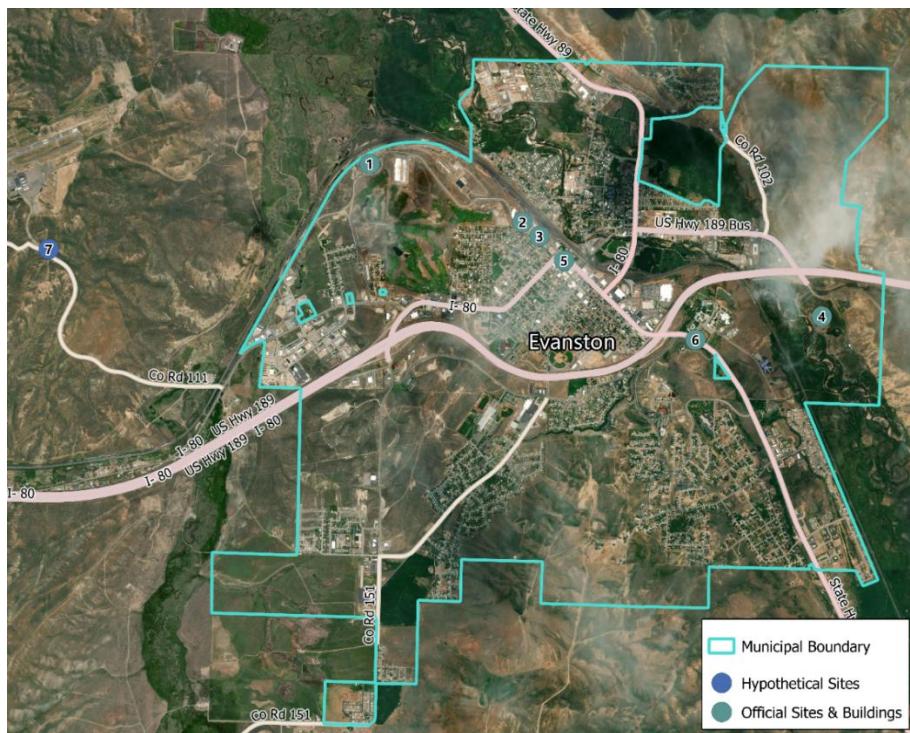
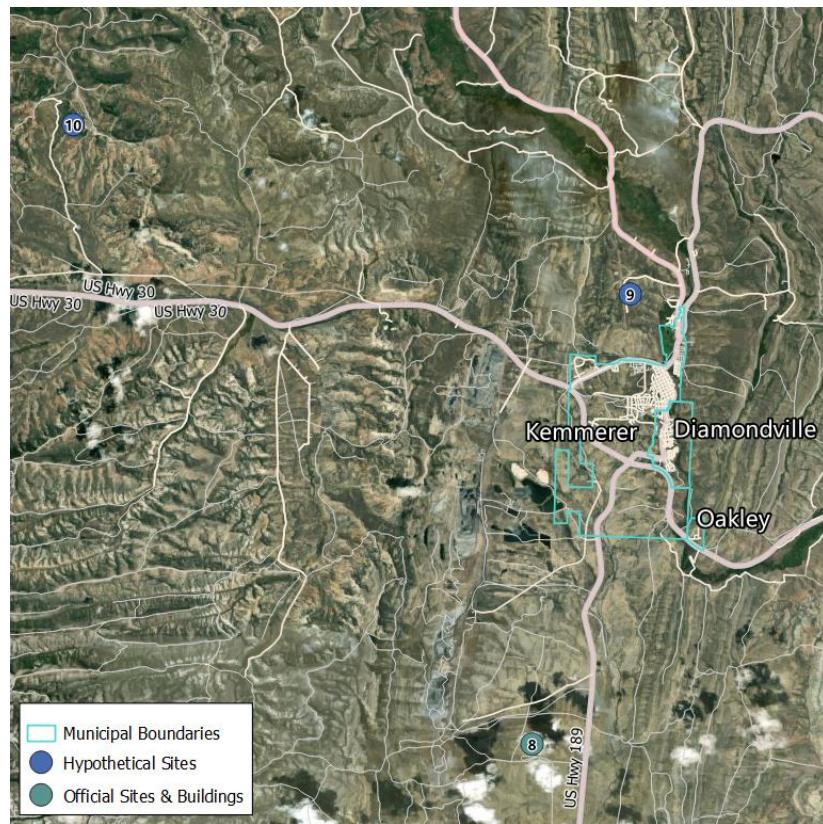


Figure 3. Southwest Wyoming Potential Development Sites in South Lincoln County



Blockchain Processing Facilities

Relevant NAICS Code(s): 522320: Financial Transactions Processing, Reserve, and Clearinghouse Activities; 518210: Data Processing, Hosting, and Related Services

Cluster Group(s): Financial Services; Business Services

Over the past ten years, blockchain processing has gone from being an obscure obsession of computer scientists, to a national pariah, to an industry ripe with opportunity to transform e-commerce and cyber security. Part of this transformation includes the recognition by financial industry insiders, that blockchain processing, the technology behind cryptocurrency mining, can be adapted to serve a limitless number of other industries. The most obvious application is in FinTech (a combination of finance and technology) but other potential applications include cybersecurity, government, transportation, and healthcare.

In many ways, blockchain processing facilities are effectively the same as data centers. The site fundamentals to serve blockchain processing are all in place in Uinta and South Lincoln Counties, including ultra-low energy costs (especially in close proximity to the Naughton plant), moderate to low temperatures, access to broadband internet, and accessibility of affordable real estate. The strong assets of Wyoming are borne out in industry performance over the past five years. Though still small in number, employment in = Data Processing, Hosting, and Related Services increased in Wyoming by 31% over the past five years.³ In addition, recent regulatory changes by the Wyoming State government, make Wyoming a particularly attractive location for crypto currency entrepreneurs. Though the details of the bill are arcane, the upshot is that Wyoming is offering legal status to digital tokens and exempting them from state property taxes, both steps that no other state has taken thus far.⁴

The potential impact of this regulatory change cannot be overstated. Many cryptocurrency companies operate in a legal grey area, where it is never certain how regulators many intervene into business operations. When governments do step in to create rules, they have often been too burdensome or complex for companies to comply. For instance, in 2015, when New York State articulated its cryptocurrency laws, requiring businesses to acquire a "bit license" all investment and business activity in this sector effectively halted. The latest reports indicate that only four businesses, out of the hundreds that were in the industry three years ago, have managed to acquire the license.⁵ States with large financial sectors, such as California and New York, are actively re-examining both cryptocurrencies and blockchain processing, so they can determine how government can better monitor these industries without being overly intrusive.⁶ The fact that Wyoming has already articulated its position, and it is considerably more open than other states, will give the state a window of opportunity in this sector.

³ Economic Modeling Specialists, Inc. (Emsi), 2018Q4.

⁴ Darryn Pollack, "Wyoming Introduces Bill Offering Cryptocurrencies Legal Clarity To Attract Blockchain Business". <https://www.forbes.com/sites/darrynpollack/2019/01/18/wyoming-introduces-bill-offering-cryptocurrencies-legal-clarity-to-attract-blockchain-business/#5bf1f05246d5>.

⁵ Jen Wieczner, "Inside New York's BitLicense Bottleneck: An 'Absolute Failure?': <http://fortune.com/2018/05/25/bitcoin-cryptocurrency-new-york-bitlicense/>.

⁶ Nikhilesh De, "New York Forms Blockchain Study Task Force, Hints at BitLicense Update". <https://www.coindesk.com/new-york-forms-blockchain-study-task-force-hints-at-bitlicense-update>.

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New regulations have been successful at attracting businesses. Since the passage of HB 70 in March 2018, an influx of companies have registered in the Cowboy state at a pace, according to one source of “two to three crypto-related” companies per day.⁷ However, there are challenges for the state to compete in this space. First and foremost, Wyoming is nowhere near the institutional capitals of finance within the United States. Other concerns are unique to the Southwestern part of the state. Much of the emphasis for this regulation spurred out of the state capital, and the Wyoming Blockchain Coalition, all of which have strong roots in the eastern quarter of the state. This is indicated in industry activity as well, as nearly all of the state’s current employment in Data Processing, Hosting, and Related Services is in Laramie County.

Table 3. Summary of Blockchain Processing Facilities

Strengths	Challenges
<ul style="list-style-type: none"> ✚ Wyoming's HB 70: Utility Token Bill makes the state the most competitive in the nation for Cryptocurrency regulation ✚ Electrical energy rate of 5 cents kWh ✚ Ideal environmental location for data centers (i.e.: climate, lack of natural disasters) ✚ Potential partnership with Wyoming Blockchain Coalition ✚ Recent job loss in data center industry in Utah, could result in windfall in Wyoming 	<ul style="list-style-type: none"> ─ Requires connections with Cryptocurrency miners and/or corporate IT leaders ─ IT workforce needs could be hard to fulfill ─ Requires adequate attention from state economic development representatives in eastern portion of Wyoming ─ Distance from financial centers of activity

TPMA believes these hurdles can be overcome, but it will require intentional focus from an economic development professional who can build relationships with the appropriate stakeholders including the Wyoming Business Council, University of Wyoming staff, and internet company representatives.

Potential Development Sites:

- 4. 1,000 Acres
- 7. Glencoe Junction Transload Facility

Potential Site Selectors to Engage⁸:

- Tracey Hyatt Bosman - Biggins Lacy Shapiro & Company
- Rene Buck - Buck Consultant International
- Darin M. Buelow - Deloitte Consulting LLP
- Will Hearn - CBRE: Commercial Real Estate Services
- Mike Mullis - J.M. Mullis, Inc.
- Ulrich Schmidt - KPMG
- Gary Yates - Jones Lang LaSalle

⁷ Benjamin Bain, “Wyoming Aims to Be America’s Cryptocurrency Capital”.

<https://www.bloomberg.com/news/articles/2018-05-15/wyoming-aims-to-be-america-s-cryptocurrency-capital>.

⁸ Full details on these options are listed in Appendix B.

Potential Company Targets⁹:

- Blockstream
- Hortau
- Touchcorp

Potential Trade Shows / Conferences¹⁰:

- Area Development
- International Economic Development Council (IEDC)
- Site Selectors Guild
- Society of Industrial and Office Realtors (SIOR)
- World Crypto Conference (WCC)
- Wyoming Economic Development Association (WEDA)
- South by Southwest (SXSW)

⁹ Full details on these options are listed in Appendix C.

¹⁰ Full details on these options are listed in Appendix D.

Downstream Chemical Products Manufacturing

Relevant NAICS Code(s): 325620: Toilet Preparation Manufacturing; 325611: Soap and Other Detergent Manufacturing; 325612: Polish and Other Sanitation Good Manufacturing; 325510: Paint and Coating Manufacturing; 325998: All Other Miscellaneous Chemical Product and Preparation Manufacturing; 324191: Petroleum Lubricating Oil and Grease Manufacturing; 325520: Adhesive Manufacturing; 325991: Custom Compounding of Purchased Resins; 325992: Photographic Film, Paper, Plate, and Chemical Manufacturing; 325613: Surface Active Agent Manufacturing; 325130: Synthetic Dye and Pigment Manufacturing; 325920: Explosives Manufacturing

Cluster Group(s): Downstream Chemical Products Manufacturing

The potential for development in this group of industries is based on the core of stable businesses that exist in the region and the potential to develop further business opportunities via supply chain connections. Those connections could either result in increased sales for existing businesses, recruitment of more companies to the region, or both.

Looking at employment landscape of Uinta and South Lincoln Counties there are 133 jobs in the Downstream Chemical Products cluster, which includes the two industries Carbon and Graphite Product Manufacturing and Toilet Preparation Manufacturing. These two industries are represented in the region by Mitsubishi Chemical Carbon Fiber and Composites and BPI Labs. Over the past sixteen years, there has also been some employment in the Explosives Manufacturing industry. Current earnings in this cluster of industries are around \$46,700, though in other regions of the country, earnings in this cluster frequently exceed \$60,000.

Looking at the broader trade radius region, which includes ten counties in Wyoming and Utah, there are 1,300 jobs in this cluster, represented by employment in eight different individual industries. That trade radius region also had demand of additional Downstream Chemical products, valued at an estimated \$737 million. The employment base within the trade radius includes, eight companies in the Soap and Detergent Manufacturing industry and seven in the Toilet Preparation Manufacturing industry.

Challenges for development in these industries include that there is a fairly small local employment base, the industries often produce solid and waste water that requires significant treatment, and chemical-based industries are heavily regulated by the federal government.

Table 4. Summary of Downstream Chemical Products Manufacturing

Strengths		Challenges
<ul style="list-style-type: none"> + Some workforce with adequate skills due to BPI Labs + Nationally, average pay at roughly \$60k/year pay + Proximity to I-80 and railroad for product transportation + Reduction in supply chain transportation cost due to industry clustering + Some existence of local industry 	<ul style="list-style-type: none"> - Fairly small existing employment base - Risk of creation of brownfields from manufacturers - Highly regulated industry segment 	

Potential Development Sites:

- 1. Union Center Business Park
- 3. Evanston's Rail Access Property
- 4. 1,000 Acres
- 7. Glencoe Junction Transload Facility
- 8. Evanston-Uinta County Burns Field Sites

Potential Site Selectors to Engage:¹¹

- Tracey Hyatt Bosman - Biggins Lacy Shapiro & Company
- Rene' Buck - Buck Consultant International
- Darin M. Buelow - Deloitte Consulting LLP
- Didi Caldwell – Global Location Strategies
- Dennis Donovan - Wadley Donovan Gutshaw Consulting LLC
- Andreas Dressler - Conway Advisory
- Mark Williams – Strategic Development Group
- Jeannette Goldsmith – Strategic Development Group
- Will Hearn - CBRE: Commercial Real Estate Services
- Jim Renzas - The RSH Group
- Don Schjeldahl - DSG Advisors
- Ulrich Schmidt - KPMG
- John F. Sisson - Next Move Group
- Gary Yates - Jones Lang LaSalle

Potential Company Targets:

- GreenMantra Technologies Inc.
- Wacker Chemie

Potential Trade Shows / Conferences:

- Industrial Asset Management Council (IAMC)
- Area Development
- ENERCOM
- Site Selectors Guild
- International Economic Development Council (IEDC)
- Society of Industrial and Office Realtors (SIOR)
- Society for Mining, Metallurgy & Exploration (SME)
- Wyoming Economic Development Association (WEDA)
- HANNOVER MESSE

¹¹ Full details related to potential site selectors, company targets and potential trade shows/conferences are included in Appendices B, C and D.

Wind Turbine Manufacturing

Relevant NAICS Code(s): 333611: Turbine and Turbine Generator Set Units Manufacturing

Cluster Group(s): Production Technology & Heavy Machinery

Potential Sites: Industrial

The heart of this economic development opportunity lies at the nexus of multiple factors including the following: the growing strength of wind energy production of the state, the proximity of Uinta and South Lincoln Counties to additional opportunities in other neighboring states, and the location of the Mitsubishi Chemical Carbon Fiber and Composites plant.

According to the U.S. Energy Information Administration (EIA), Wyoming is one of the nation's largest producers of energy, ranking third in total production in 2017.¹² Though much of this production is due to coal and natural gas, the state also ranked 16th in the nation in wind energy production, producing 1,500 megawatts. As demonstrated in Figure 4, Wyoming has 20 individual wind power plants across the state, the majority of which are near Cheyenne and Casper. However, there are at least three plants in Uinta County. According to experts, the industry will only continue to grow in coming years. Jonathan Naughton of the University of Wyoming's Wind Energy Research Center anticipates the advent of up to 5,000 megawatts of wind power in the next five to seven years.¹³ Growth is headlined by potential large-scale developments such as the Chokecherry Sierra Madre wind farm near Rawlins,¹⁴ but many smaller projects are in development as well, not least of which the Uinta Wind Energy, LLC northeast of Evanston.

Naturally, all of these factors relate to production of wind, not the production of wind turbines. However, wind turbine manufacturing is a growing industry in its own right. Producers of towers and turbines will save cost by placing plants in regions where strong growth is occurring, which largely includes Western and plains states, both in close proximity to Wyoming.

The United States Bureau of Labor Statistics does not capture information for wind turbine manufacturing individually, instead data are tabulated for "Turbine and Turbine Generator Set Units Manufacturing," an industry that also includes steam turbines, turbine motors, and a number of other sub-categories. Using this industry as a proxy, TPMA is able to determine high-level trends within the industry. The turbine production industry is scattered in various states across the country, the most dominant including California, New York, and South Carolina. The industry's performance has been inconsistent in recent years, contributing exceptional growth between 2004 and 2011 and net decline between 2012 and 2018.

MITSUBISHI CORPORATION PRESS RELEASE

"A continuing drive for renewable energy has increased the need for additional wind turbines; this has been the primary driver for this acquisition."

¹² U.S. Energy Information Administration, Wyoming State Profile & Energy Estimates.

<https://www.eia.gov/state/?sid=WY>.

¹³ Heather Richards, "Bigger Than Ever, Wind is Coming to Wyoming." https://trib.com/business/energy/bigger-than-ever-wind-is-coming-to-wyoming/article_972f6b0e-bc17-53dd-87fb-c15b83d83e08.html.

¹⁴ Ibid.

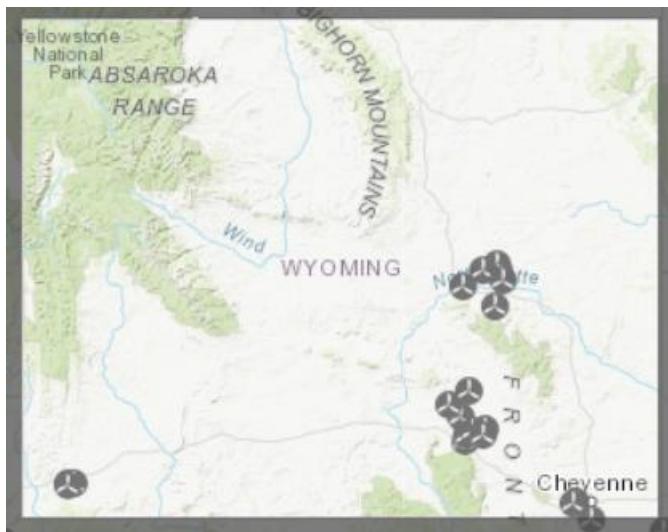
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The up-and-down nature of the industry is largely attributable to the short-term effects of credits and continuous changes in federal policy. The market for new wind turbines is somewhat unpredictable over the next three years, due to the expiration of numerous large tax-credits for substantial producers. However, most experts expect the industry to emerge from the early 2020's as a preferred alternative for renewable energy.¹⁵

An additional ancillary opportunity associated with the wind turbine manufacturing industry is the resurfacing of wind turbine blades. With the number of wind turbines currently in operation nationally, there is a growing demand for the repair and maintenance of blades, which is sometimes performed on-site and other times shipped to a resurfacing facility. There is clearly a demand for such services, however, at this time TPMA was unable to find further detailed information about trends related to this sub-industry.

Figure 4. Location of Wind Power Plants in Wyoming, 2017



Lastly, an important factor not to be lost in these statistics is that the Mitsubishi company acquired the Evanston Mitsubishi Chemical Carbon Fiber and Composites plant specifically for its ability to produce large-tow carbon fiber. According to a company press release, "A continuing drive for renewable energy has increased the need for additional wind turbines; this has been the primary driver for this acquisition." Ranking officials with the Mitsubishi corporation are actively selling carbon fiber produced in Evanston to wind turbine producers. With the cooperation of an economic development organization and officials from Mitsubishi, the region may demonstrate the value in developing a wind turbine plant in Uinta or South Lincoln Counties.

Table 5. Summary of Wind Turbine Manufacturing

Strengths	Challenges
<ul style="list-style-type: none"> ✚ Wyoming and several neighboring states are the US's top producers in Wind Energy ✚ Large reason for the acquisition of Evanston Carbon by Mitsubishi Chemical Carbon Fiber and Composites was to serve the wind market 	<ul style="list-style-type: none"> ─ Domestic and international competition for placement of wind turbine manufacturing plants ─ Industry growth has slowed since initial emergence in early 2000's ─ Mitsubishi may wish to vertically control their product supply chain

¹⁵ Devin McGinly, "Against the Wind: Dwindling Government Support Will Hurt Demand for New Turbines." IBIS World Reports, November 2016.

Potential Development Sites:

- 1. Union Center Business Park
- 3. Evanston's Rail Access Property
- 4. 1,000 Acres
- 7. Glencoe Junction Transload Facility
- 8. Evanston-Uinta County Burns Field Sites
- 9. Kemmerer Municipal Airport Sites

Potential Site Selectors to Engage¹⁶:

- Don Schjeldahl – Austin Consulting
- Tracey Hyatt Bosman – Biggins Lacy Shapiro & Company
- Didi Caldwell -- Global Location Strategies
- Deane C. Foote – Foote Consulting Group, LLC
- Mark Williams & Jeanette Goldsmith – Strategic Development Group
- Will Hearn – CBRE
- Jim Renzas – The RSH Group
- John F. Sisson – Next Move Group
- Gary Yates – Jones Lang LaSalle
- Darin M. Buelow – Deloitte Consulting LLC

Potential Company Targets:

- Vestas

Potential Trade Shows / Conferences:

- The American Society of Mechanical Engineers
- State Science & Technology Institute (SSTI)
- Wyoming Economic Development Association (WEDA)
- HANNOVER MESSE
- WINDExchange
- Industrial Asset Management Council (IAMC)

¹⁶ Full details related to potential site selectors, company targets and potential trade shows/conferences are included in Appendices B, C and D.

Aerospace Parts Manufacturing

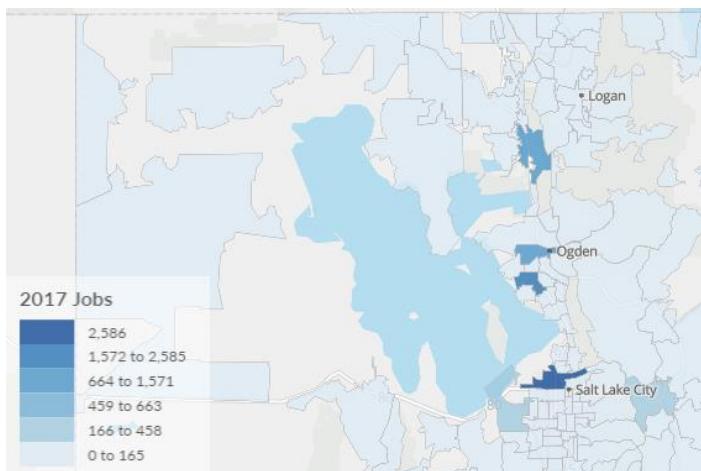
Relevant NAICS Code(s): 336411: Aircraft Manufacturing; 336413: Other Aircraft Parts and Auxiliary Equipment Manufacturing

Cluster Group(s): Aerospace Vehicles & Defense

Potential Sites: Industrial

One of the advantages of the geographic location of Uinta and South Lincoln counties is the ability to tie into industry trends in multiple states, namely Wyoming, Utah, and Idaho. In this case, Aerospace is one of the strongest and highest growth sectors in Utah, boasting of 6,500+ workers, and average earnings exceeding \$88,000. As indicated in Figure 5, the majority of these jobs are located in the Salt Lake City metro area, primarily Salt Lake City, Clearfield, and Ogden.

Figure 5. Location of Aerospace Employment in Salt Lake City Metro Area



Where the Aerospace sector thrives in various locations across the United States, such as Washington, Alabama, and Kentucky, it is characterized by a large number of subcontracting firms that create products and parts for a small number of commercial or defense-related businesses such as Northrup Grumman, Boeing, etc. Involvement in this sector, therefore, often starts with an entrepreneur's ability to navigate the complexities of federal contracting. Though Uinta & South Lincoln

Counties currently do not have any employers in the Aerospace industry, they do have some that could serve as subcontractors to prime aerospace defense contractors, including businesses such as Machine Shops, Small Arms, Ordnance, and Ordnance Accessories Manufacturing; and Metal Heat Treating. In addition, Mitsubishi Chemical Carbon Fiber and Composites again plays a role in this opportunity as the large-tow carbon fiber produced at this facility is often used as an input for aerospace manufacturers. Pundits within the aerospace industry anticipate greatly increased demand for carbon fiber in aerospace production over the next twenty years as composite materials result in lighter aircraft with longer life and a superior passenger experience.¹⁷

Challenges to development in this industry are primarily relationship-based. Generating business opportunities will require in-roads with aerospace business leaders located in the Salt Lake City area, as well as direct line of communication with executives at the Mitsubishi corporation. In addition, at this stage, attracting a large-scale aerospace parts manufacturer is unlikely due to the lack of workforce with this particular skill-set. A more likely entry point would include an existing smaller business (less than 100

¹⁷ Adrian Williams, Composites World, "The business case for carbon fiber in narrow bodies has become a lot stronger now that these operational benefits are in evidence."

<https://www.compositesworld.com/columns/aerospace-growth-climbs-with-carbon-fiber>.

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employees) selling its products to the aerospace industry, or the advent of a smaller parts manufacturer from outside of the region.

Table 6. Summary of Aerospace Parts Manufacturing

Strengths	Challenges
 Salt Lake area has multiple large aerospace manufacturers that could potentially extend some production into Uinta County	 Mitsubishi may wish to vertically control their product supply chain
 Expectation that aerospace companies will start to use large-tow carbon products (i.e.: Evanston Carbon)	 Requires in-roads with Salt Lake aerospace manufacturers
 Aerospace & Defense are target industry sectors for the state of Utah	

Potential Development Sites:

- 1. Union Center Business Park
- 3. Evanston's Rail Access Property
- 4. 1,000 Acres
- 7. Glencoe Junction Transload Facility
- 8. Evanston-Uinta County Burns Field Sites
- 9. Kemmerer Municipal Airport Sites

Potential Site Selectors to Engage¹⁸:

- Tracey Hyatt Bosman- Biggins Lacy Shapiro & Company
- Dennis Donovan – Wadley Donovan Gutshaw Consulting LLC
- Deane C. Foote – Foote Consulting Group, LLC
- Mark Williams & Jeanette Goldsmith – Strategic Development Group
- Mike Mullis – JM Mullis, Inc.
- Don Schjeldahl – Austin Consulting
- Rene Buck – Buck Consulting International
- Jay Garner, Garner Economics LLC
- Angelos Angelou – Angelou Economics

Potential Company Targets:

- IABG Industrieanlagen-Betriebsgesellschaft MBH
- Testia

¹⁸ Full details related to potential site selectors, company targets and potential trade shows/conferences are included in Appendices B, C and D.

Potential Trade Shows / Conferences:

- Area Development
- International Economic Development Council (IEDC)
- International Paris Air Show
- Utah Economic Summit
- Industrial Asset Management Council (IAMC)
- American Aerospace & Defense Summit

Mining Machinery and Oil & Gas Machinery Manufacturing

Relevant NAICS Code(s): 333131: Mining Machinery and Equipment Manufacturing; 333132: Oil and Gas Field Machinery and Equipment Manufacturing

Cluster Group(s): Production Technology & Heavy Machinery; Oil & Gas Production & Transportation

Potential Sites: Industrial

In 2018, Wyoming ranked 3rd in the United States in total energy production, including 1st in the United States in coal production, 7th in crude oil production, and 8th in natural gas production.¹⁹ Despite the state's esteemed position in the energy production sector, the state ranks 17th in the United States in employment within the industries that produce mining and extraction equipment. As of 2017, there were 234 jobs in Wyoming in Mining Machinery and Equipment Manufacturing and Oil and Gas Field Machinery and Equipment Manufacturing, all of which were located in Natrona County.²⁰ Clearly history and familiarity play a role in the location of such businesses. Historically, the majority of such operations occur in Gulf states and states and/or locations of oil and gas company headquarters. In fact, in 2017, 80% of all workers in these industries were located in the three states of Texas, Louisiana, and Oklahoma.

An additional ancillary opportunity connected with Mining Machinery and Oil & Gas Machinery Manufacturing is the Metallurgy industry, which process ore material into a variety of metal products. Like, the Mining Machinery and Oil & Gas Machinery Manufacturing industries, these industries tend to be highly geographically concentrated in certain states which, in this case includes Pennsylvania and Wisconsin.

If pursued, regional leaders should be aware that employment in these industries does tend to fluctuate, in accordance with oil and gas prices, the strength of the US dollar, and growth in international markets.²¹ The industry therefore brings with it more of the same boom and bust potential that existing energy industries experience. In addition, the industry is phase of consolidation, with large companies tending to buy up smaller competitors. Some of the largest competitors include businesses such as National Oilwell Varco, Halliburton, and others (see Figure 6). Any effort to develop this industry should start with efforts

¹⁹ United States Energy Information Administration, Rankings. <https://www.eia.gov/state/rankings/>.

²⁰ It is important to point out that due to industry classification patterns determined by the federal government, the NAICS codes listed in connection with this opportunity include all forms of mining machinery equipment, not just those associated with energy industries.

²¹ Darshan Kalyani, "Oil slick: Revenue will rebound, but fluctuating commodity prices will continue to pose a threat." IBIS World Reports. November 2016.

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to connect with industry leaders at businesses who may be looking for expansion locations in lower-cost states.

Figure 6. Mining Machinery and Oil & Gas Machinery Manufacturing Businesses by Market Share (2016)

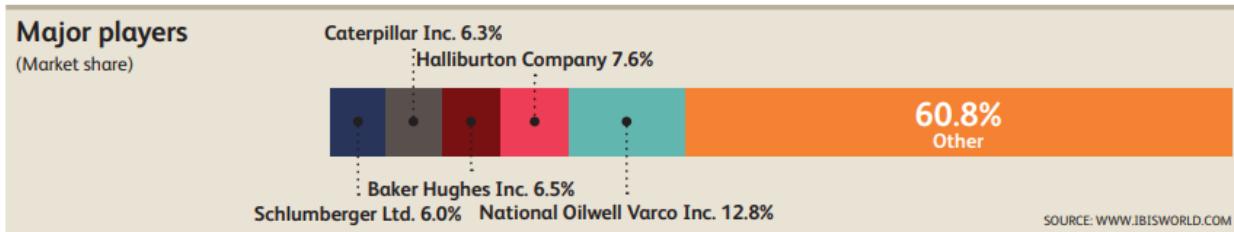


Table 7. Summary of Mining Machinery and Oil & Gas Machinery Manufacturing

Strengths	Challenges
<ul style="list-style-type: none"> + Marketing and transportation cost advantages for manufacturers to locate near where their products are used + Workforce familiar with the equipment and processes + Proximity to railroad for transportation purposes + Little manufacturing of this sort in the Rocky Mountain or northern Plains states 	<ul style="list-style-type: none"> - Highly capital-intensive and mature industry - Would require break from historic pattern of manufacturing such products in Texas and the Gulf Coast

Potential Development Sites:

- 1. Union Center Business Park
- 3. Evanston's Rail Access Property
- 4. 1,000 Acres
- 7. Glencoe Junction Transload Facility
- 8. Evanston-Uinta County Burns Field Sites
- 9. Kemmerer Municipal Airport Sites

Potential Site Selectors to Engage²²:

- Didi Caldwell – Global Location Strategies
- Mark Williams & Jeanette Goldsmith – Strategic Development Group
- Tracey Hyatt Bosman- Biggins Lacy Shapiro & Company

Potential Company Targets:

- LEAX Group AB
- SIMEX Srl

²² Full details related to potential site selectors, company targets and potential trade shows/conferences are included in Appendices B, C and D.

Potential Trade Shows / Conferences:

- Area Development
- ENERCOM
- Society for Mining, Metallurgy & Exploration (SME)
- Mining Tech
- Industrial Asset Management Council (IAMC)
- WINDExchange

Firearms & Ammunition Manufacturing

Relevant NAICS Code(s): 332992: Small Arms Ammunition Manufacturing; 332993: Ammunition (except Small Arms) Manufacturing; 332994: Small Arms, Ordnance, and Ordnance Accessories Manufacturing

Cluster Group(s): Downstream Metal Products

Potential Sites: Industrial

The region has a very small cottage-industry presence of Small Arms, Ordnance, and Ordnance Accessories Manufacturing, equivalent to 6 jobs in 2017, which may be from a single facility or may be from a handful of hobbyists selling independently. Therefore, the industry does not have a strong presence locally, currently. The advantages in this industry are due to strong national growth (4% increase in employment over the prior five years) and even stronger growth in Wyoming (300% growth over the past 5 years). In addition, the Wyoming Business Council lists Firearms Manufacturing as one of its handful of target industries, citing recent growth, high registered gun ownership rates, and large tracts of public land as some of the state's key advantages.²³ It also must be noted that numerous other states are actively promoting firearms and ammunition manufacturing as target industries — Idaho, Texas, and Mississippi, to name a few.

Table 8: Summary of Firearms & Ammunition Manufacturing

Strengths	Challenges
<ul style="list-style-type: none"> ✚ Strong recent industry growth in Wyoming ✚ Squarely related to Wyoming Business Council targeted industries ✚ Culturally ill-suited for many regions in North America ✚ Some presence of industry in the region currently 	<ul style="list-style-type: none"> ─ Several states including Idaho, Texas and Mississippi are actively courting gun and ammunition manufacturers

Potential Development Sites:

- 1. Union Center Business Park
- 3. Evanston's Rail Access Property

²³ Wyoming Business Council, Firearms Manufacturing Industry Profile, http://www.wyomingbusiness.org/Uploads/PDFFiles/NewPDFs/firearms_profile_2019.pdf.

- 4. 1,000 Acres
- 7. Glencoe Junction Transload Facility
- 8. Evanston-Uinta County Burns Field Sites
- 9. Kemmerer Municipal Airport Sites

Potential Site Selectors to Engage²⁴:

- Tracey Hyatt Bosman- Biggins Lacy Shapiro & Company
- Dennis Donovan- Wadley Donovan Gutshaw Consulting LLC
- Didi Caldwell – Global Location Strategies

Potential Company Targets:

- Daniel Defense
- Liberty Ammunition
- MMC Armory

Potential Trade Shows / Conferences:

- National Shooting Sports Foundation (NSSF)
- Wyoming Economic Development Association (WEDA)
- Industrial Asset Management Council (IAMC)

²⁴ Full details related to potential site selectors, company targets and potential trade shows/conferences are included in Appendices B, C and D.

Back Office Services

Relevant NAICS Code(s): 561422: Telemarketing Bureaus and Other Contact Centers; 561421: Telephone Answering Services; 561410: Document Preparation Services; 541214: Payroll Services; 561110: Office Administrative Services;

Cluster Group(s): Business Services

Potential Sites: Evanston Historic Roundhouse and Railyards; Office space

The group of industries co-classified as Back Office Services here are often clustered together in or near second-tier cities throughout the United States. In many cases, businesses can benefit from outsourcing this variety of services to regions with lower labor costs. Utah has long been one of the nation's leaders in some of these industries, namely, Telemarketing Bureaus and Other Contact Centers and Telephone Answering Services. In terms of location quotient, Utah ranks third in the nation just behind Idaho and Arizona in these industries. Most of the employment is in the greater Salt Lake area but stretches both north as far as Cache County and south as far as Utah County. Nationally, employment in telemarketing and call centers is continuing to rise, increasing by 16% over the past five years, but it is clearly consolidating in a handful of states with a specialization in the industry.

These industries come with a handful of disadvantages as well. First, labor saving technologies and software programs are rapidly changing these industries. To use a few examples, recent industry enhancements such as voice recognition technology (VRT) and optical character recognition (OCR) are resulting in lessened need for employees.²⁵ Additionally, the call center industry has unfortunately attracted some bad actors who used technology to exploit unaware citizens, some of which are located just across the border, such as recently fined Feature Films for Families Inc.²⁶ Hence, not all such businesses would count as a win for Uinta and South Lincoln Counties but would need to be vetted by local government and economic developers. Lastly, there was a considerable presence of Telemarketing Bureaus in the region, but the industry vacated rapidly around 2001 after previously employing more than 60 workers.²⁷

Despite these issues, Back Office services do offer advantages for regions seeking to diversify into more professional services. Back Office services typically follow a pattern of moving from place to place as those regions develop, incomes increase, and educational levels increase. These industries offer employment to individuals with some college education, or even a high school diploma, in an indoor setting where they are acquiring professional and business skills. Historically, this is not an industry group that maintains a presence in the long-term, but it can serve as a helpful stepping stone for the regional workforce to add additional skills.

²⁵ Kelsey Oliver, "Proofed: Rising healthcare expenditure will boost demand but competition will hinder growth" IBIS World Reports. May 2017; Madeline Hurley, "Outbound calls: Increasing demand will boost revenue, but offshoring will limit growth." IBIS World Reports, October 2016.

²⁶ Dennis Ramboy, "Feature Films for Families slapped with hefty fine for telemarketing calls."

<https://www.deseretnews.com/article/900013993/feature-films-for-families-slapped-with-hefty-fine-for-telemarketing-calls.html>.

²⁷ Emsi 2019Q1

Table 9. Summary of Back Office Services

Strengths	Challenges
<ul style="list-style-type: none"> <li data-bbox="192 304 780 375">+ Cost competitive industry that has shifted away from Utah recently <li data-bbox="192 375 780 481">+ Entry-level back-office industry that could result in more value-added services over time <li data-bbox="192 481 780 595">+ Low workforce barriers to entry in terms of specific educational credentials and license. 	<ul style="list-style-type: none"> <li data-bbox="780 304 1428 340">- Considerable employment loss in region in 2005 <li data-bbox="780 340 1428 411">- Depending on type of center, may require legislative lobbying <li data-bbox="780 411 1428 447">- Fairly low-wage industries <li data-bbox="780 447 1428 519">- Work often requires bilingual workforce, a limited local population <li data-bbox="780 519 1428 658">- Technology in the form of voice recognition technology (VRT) and optical character recognition (OCR) limits industry's long-term growth

Potential Development Sites:

- 1. Union Center Business Park
- 2. Evanston Historic Roundhouse and Railyards
- 3. Evanston's Rail Access Property
- 5. Hotel Evanston
- 6. Wyoming State Hospital Campus

Potential Site Selectors to Engage²⁸:

- Dennis Donovan- Wadley Donovan Gutshaw Consulting LLC
- Deane C. Foote – Foote Consulting Group, LLC
- John f. Sisson – Next Move Group
- Jerry Szatan – Szatan & Associates

Potential Company Targets:

- FIS
- Sonovision Canada

Potential Trade Shows / Conferences:

- Shared Services & Outsourcing Network

²⁸ Full details related to potential site selectors, company targets and potential trade shows/conferences are included in Appendices B, C and D.

Boutique Hotel

Relevant NAICS Code(s): 721110: Hotels (except Casino Hotels) and Motels

Cluster Group(s): Hospitality & Tourism

Potential Sites: Hotel Evanston

Uinta County supports a considerable tourism-based economy, including both local and overnight travelers to Flaming Gorge, Park City, the Uinta Mountains, Fossil Butte, and other locations. In addition, summer events such as Rendezvous draw a considerable number of non-regional visitors. A 2017 study for the Wyoming Office of Tourism indicated that Uinta County ranks 11th in the state in terms direct tourism impact with \$91.8 million in visitor spending. Of that amount \$15.5 million is spent on accommodations and food service.²⁹ Despite these metrics, the perception among local residents is that many visitors simply “stop by the Maverick” (i.e.: the local gas station) on their way out of town, but currently few consider Evanston to be a destination worth staying overnight. With the addition of upper-middle scale tourism amenities, such as a boutique hotel, some of that perception could be altered.

Boutique hotels are typically sponsored and operated by a local entrepreneur who sees the opportunity and is willing to take the risk. However, to complicate matters, entrepreneurs typically require bank financing for construction, renovation, furniture, and fixtures, etc. Furthermore, a common trend in the boutique hotel industry is for local operators to seek affiliation with a regional or national boutique hotel chain. Even in cases where this is not desired by operators, banks may require the affiliation to off-set their risk. Some examples of such organizations include Ascend Collection (Choice Hotels International), Best Western Premier, and C'mon Inn.

Figure 7: Hotel Evanston in Downtown Evanston



Population and tourism traffic in Evanston are low enough that boutique affiliate organizations are likely to overlook the region at first glance. It is most likely that any activity to push this idea forward would come from a local entrepreneur, with a vested interest in the community. Furthermore, TPMA recommends that the Hotel Evanston be considered the best and most likely candidate for this opportunity. The downtown location, as well as the value of the public and private investment in this property create a significant cost advantage to an operator that frankly cannot be beat in comparison to the cost of ground-up construction. The best path forward for Evanston and the Evanston Urban Renewal District is to either target boutique hotel chains

²⁹ Dean Runyan Associates, “Wyoming Travel Impacts, 2004-2017.” March 2018.

<https://www.travelwyoming.com/sites/default/files/uploads/industry/State%20and%20County%20Economic%20Impact%20Report%202017.pdf>.

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(such as those previously mentioned) consider this site, or to issue an RFP to real estate developers inviting submissions for property development.

Table 10. Summary of Boutique Hotels

Strengths	Challenges
<ul style="list-style-type: none"> ✚ Few boutique hotels in the area ✚ Proximity to I-80 could attract more drive-by traffic ✚ Could minorly increase tourism traffic ✚ Could add to vibrancy of Downtown Evanston area ✚ Existence of New Market Tax Credit and Historical Building Tax Credits to attract more entrepreneurial attention to historic building reuse ✚ Hotel Evanston's location in an Opportunity Zone 	<ul style="list-style-type: none"> ▬ Potential oversaturation of market could cause closure of marginal locally owned hotels ▬ Industry offers very low wages to workers ▬ Currently, redevelopment of Hotel Evanston is considered cost prohibitive by real estate developers who have considered the site.

Potential Development Sites:

- 5. Hotel Evanston

Potential Site Selectors to Engage³⁰:

- Gary Yates – Jones, Lang, LaSalle
- Jim Renzas – The RSH Group

Potential Company Targets:

- The Hagadone Corporation

Potential Trade Shows / Conferences:

- Boutique & Lifestyle Hotel Summit
- International Economic Development Council (IEDC)

³⁰ Full details related to potential site selectors, company targets and potential trade shows/conferences are included in Appendices B, C and D.



6. TARGET INDUSTRY
OPPORTUNITIES

Introduction

As noted in the Executive Summary of this report, Chapter 6. Target Industry Opportunities, highlights among the remaining 13 industries that are not highlighted in Chapter 5. This section does not contain the associated potential sites, site selection consultants, recommended companies for recruitment, or Business Recruitment Events/Conferences.

Industrial Target Industry Opportunities

The following industrial target industry opportunities are summarized in Chapter 5. Target Industry Implementation Outlines: Blockchain Processing Facilities; Downstream Chemical Products Manufacturing; Wind Turbine Manufacturing; Aerospace Parts Manufacturing; Mining Machinery and Oil & Gas Machinery Manufacturing; Highway & Infrastructure Construction; Firearms & Ammunition Manufacturing.

Solid Waste Collection, Storage and Combustion

Relevant NAICS Code(s): 562111: Solid Waste Collection; 562212: Solid Waste Landfill; 562213: Solid Waste Combustors and Incinerators

Cluster Group(s): Local Logistical Services; Environmental Services

Potential Sites: Former coal mining land

Though not the most exciting of industry development opportunities, the region should be aware of all possibilities, especially those that can use lands that already possess limited use. There are 700 acres of land south of Kemmerer which were formerly used for coal mining and are now restricted for any government or private use.³¹ Though it would likely require input from the Wyoming Department of Environmental Quality (DEQ), some of these lands could be used as a landfill. While there are various landfills throughout the region, one of larger size could serve a wider region, such as the Salt Lake metro area, which could be used to create jobs and bring in tax dollars from outside of the region. An additional silver lining with this opportunity is that certain solid waste companies also specialize in converting methane to energy, such as Advanced Disposal, that operates no less than 38 facilities throughout the United States and Caribbean.³²

³¹ FMC Corporation – Former Coke Plant, Kemmerer, Wyoming, <http://deq.wyoming.gov/shwd/rcra-facilities/resources/fmc/>.

³² Advanced Disposal, <https://www.advanceddisposal.com/for-mother-earth/education-zone/landfill-gas-to-energy.aspx>.

Table 11. Summary of Solid Waste Collection, Storage and Combustion

Strengths	Challenges
<ul style="list-style-type: none"> + Workforce familiar with transportation and waste disposal + Certain waste disposal companies also produce energy through incinerators or methane gas re-capture + Abundance of space + Familiarity of population with land-intensive industries + Use of land not applicable for other purposes 	<ul style="list-style-type: none"> - Potentially unpopular with the public - Risk of environmental contamination

Service Industry Opportunities

Back Office Services is summarized in Chapter 5. Target Industry Implementation Outlines.

Retirement Communities

Relevant NAICS Code(s): 623311: Continuing Care Retirement Communities; 623312: Assisted Living Facilities for the Elderly

Cluster Group(s): Local Health Services

Potential Sites: Office and Medical Space; Wyoming State Hospital; Hotel Evanston

Wyoming offers certain advantages to those nearing retirement age, namely a low cost of living and low taxes. Evanston offers additional advantages, including availability of workforce in residential and outpatient care and easy freeway access to Salt Lake City. Numerous publications rank Wyoming highly as a desirable location for retirees. For example, "The Street" ranked Wyoming 7th in the United States, and first in terms of tax advantages.³³ Similarly Kiplinger ranked Wyoming 17th, and first in terms of tax obligation.³⁴ Implicit in these assumptions are that Wyoming possesses certain flaws as well, which are typically pointed out as high cost of transportation and long cold winters.

Demographics suggest that the region will be needing more retirement care facilities. Like most states in the country, the population of individuals 55+ is increasing in Wyoming, growing by 12% over the past five years in comparison to less than 1% for the population in general. This population cohort is equal to 29% of the region's population (over 26,000 individuals).³⁵

Some of the biggest challenges to making this concept work in Evanston are endemic to the industry. In particular, entrepreneurs are not incentivized to provide long-term care for low- and middle-income

³³ The Street Staff, "These are the Best US States for Retirees." <https://www.thestreet.com/personal-finance/these-are-the-best-u-s-states-for-retirees-14650518>.

³⁴ Stacy Rapacan, "Best States to Retire 2018: All 50 States Ranked for Retirement." <https://www.kiplinger.com/slideshow/retirement/T006-S001-all-50-states-ranked-for-retirement-2018/index.html>.

³⁵ Emsi, 2019Q1

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individuals. Retirement care facilities are expensive to operate and payments from federal subsidies can be limited. Hence it is often easier for business owners to target high net worth individuals. Another potential downward pressure on this industry in Wyoming is the fairly low cost of housing, in comparison to national averages, which incentivizes elderly individuals to continue living in their own homes.

Table 12. Summary of Retirement Communities

Strengths	Challenges
+ Build upon existing workforce strengths in residential health care (i.e.: State Hospital)	- High elevation and cold may discourage some residents from living in the area
+ Low concentration of retirement center facilities across the state	- Economics of retirement centers favor high-income individuals, which are not populous in the region
+ Serve the growing retired community in Wyoming	

Outdoor Recreation Retail & Rental

Relevant NAICS Code(s): 451110: Sporting Goods Stores; 532284: Recreational Goods Rental

Cluster Group(s): Local Entertainment & Media

Potential Sites: Downtown Evanston, Bear River State Park, Hams Fork River, Uinta Mountains

Figure 8. The Rio Oso Trail



As suggested in the Uinta & South Lincoln Counties branding platform, the region is “The Wasatch Frontier” offering access to a stunning array of recreational amenities. Yet, there is little to no retail to support hobbyists and adventurers. One of the region’s advantages in this regard is that every season of the year accommodates some form of outdoor recreation, whether camping, hunting, fishing, mountain biking, skiing, or snowboarding. Natural beauty, outdoor lifestyle, and sports feature heavily in the resident Regional Branding Survey conducted by Destination by Design. In not capitalizing on the community’s appreciation and identity related to outdoor sports, the region is likely allowing a lot of community spending to “leak” out of the region to locations such as Park City and Salt Lake. Based on data from Emsi, TPMA estimates that the size of lost opportunity in the Sporting Goods Stores and Recreational Goods Rental industries is north of \$1.9 million annually.³⁶

³⁶ Emsi 2019Q1

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In tandem with this consideration, the City of Evanston and its partners should consider more heavily promoting its local outdoor assets. The Rio Oso trail is rated as the 7th best mountain biking trail circuit among the state's 700+ routes, according to Trailforks, a popular mountain biking website.³⁷ Yet, the fact that the trail is only 8 miles inhibits its popularity for biking enthusiasts. It would require coordination with private land owners, the County, and the State, but expansion of this trail network could pay considerable dividends in tourism traffic.

Table 13. Summary of Outdoor Recreation Retail & Rental

Strengths	Challenges
+ Bike sales/rental shop could provide greater access to the Rio Oso Trail System, which is highly rated in the region and state	- Relatively few jobs - Relatively low-wage jobs
+ Could enable both mountain biking and road biking for high elevation training	- Store would need to provide an array of products to avoid being too seasonally focused, requiring an array of expertise on products and recreational amenities
+ Ski/Snowboard apparel could prevent leakage spending to Park City area	
+ Fishing, hunting, camping apparel and equipment could compliment and support tourism sector	
+ Add to vibrancy of downtown areas	

Computer Systems Design Services

Relevant NAICS Code(s): 541512: Computer Systems Design Services

Cluster Group(s): Business Services

Potential Sites: Evanston Historic Roundhouse and Railyards; Office space

Rural areas are often underserved in terms of computer and IT needs, both in terms of average citizens and businesses. Though the region only has a handful of large companies, they have little or no options locally to outsource support for computer and IT systems. Using Emsi data, TPMA estimates the size of this opportunity to be nearly \$9.6 million annually.³⁸ Several of the biggest challenges in advancing this industry include finding the right contacts with business owners (especially for mining and oil and gas companies) and hiring a skilled IT workforce, which is currently lacking in the region.

³⁷ Trailforks, <https://www.trailforks.com/region/rio-oso-15306/?activitytype=1&z=15.1&lat=41.23961&lon=-110.92279>.

³⁸ Emsi 2019Q1

Table 14: Summary of Computer Systems Design Services

Strengths	Challenges
<ul style="list-style-type: none"> <li data-bbox="192 304 241 354">+ <li data-bbox="241 304 780 418">Demand from oil, gas and coal companies as well as other regional real estate & telecom companies; <li data-bbox="192 418 241 468">+ <li data-bbox="241 418 780 489">Undersupplied relative to region's size (importing \$9.6M in services each year) <li data-bbox="192 489 241 515">+ <li data-bbox="241 489 780 515">Average wages of over \$50k/year 	<ul style="list-style-type: none"> <li data-bbox="788 304 837 354">- <li data-bbox="837 304 1343 354">IT workforce needs could be hard to fulfill

Long-Haul Trucking Services

Relevant NAICS Code(s): 484121: General Freight Trucking, Long-Distance, Truckload; 434122: General Freight Trucking, Long-Distance, Less Than Truckload; 484230: Specialized Freight (except Used Goods) Trucking, Long-Distance

Cluster Group(s): Transportation & Logistics

Potential Sites: Industrial, near I-80

As of 2017, Southwest Wyoming hosts more than 100 workers in these industries, with average wages around \$50,000/year. The Specialized Freight (except Used Goods) Trucking, Long-Distance is particularly strong, as it has increased by 34 jobs in the past five years. Though the data do not make it clear, these jobs are most likely related to a firm that transports petroleum-based materials by truck.

Locational factors are a benefit to the region for this set of industries. Long-haul truckers often travel great distances and have blocks of days where they stay at home. Proximity to a major interstate (I-80) and a major metro area (Salt Lake City) mean that products to be shipped and the avenues to ship them both exist in close proximity.

Table 15. Summary of Long-Haul Trucking Services

Strengths	Challenges
<ul style="list-style-type: none"> <li data-bbox="192 1315 241 1366">+ <li data-bbox="241 1315 780 1387">Area has below average employment numbers in non-specialized freight <li data-bbox="192 1387 241 1438">+ <li data-bbox="241 1387 780 1459">Low cost of living for truckers who are frequently on the road <li data-bbox="192 1459 241 1510">+ <li data-bbox="241 1459 780 1531">Large number of truckers are currently living in the area and out commuting <li data-bbox="192 1531 241 1581">+ <li data-bbox="241 1531 780 1581">No major infrastructure needs 	<ul style="list-style-type: none"> <li data-bbox="788 1315 837 1366">- <li data-bbox="837 1315 1428 1387">Distance from warehousing and distribution centers and large markets <li data-bbox="788 1387 837 1438">- <li data-bbox="837 1387 1428 1459">Lower average daily traffic counts among trucks than other places on I-80

Expansion of Higher Education in Evanston

Relevant NAICS Code(s): 611310: Colleges, Universities & Professional Schools

Cluster Group(s): Education & Knowledge Creation

Potential Sites: Existing WWCC Campus; Office Space; Evanston Historic Roundhouse and Railyards; Wyoming State Hospital

Over the past decade, workforce development has become one of the central pillars of a community's economic development efforts. With reference to economic development opportunities, one of the questions asked by inquiring companies considering expansion or relocation is "does the region have a presence of higher education?" At the moment the region answers positively, but the actual production of completers and graduates is fairly low and the focus of the institution is not clear from an external viewpoint.

Western Wyoming Community College (WWCC) has a satellite campus in Evanston and another in Bridger Valley. Currently, the Evanston facility focuses on basic education, some healthcare, and some welding classes.³⁹ It is unclear what programs are offered in Bridger Valley. In Evanston, with a building square footage of nearly 20,000 square feet, it is likely that more could be done at the existing facility without additional space. Programs often offered by rural community colleges that ought to receive first consideration include education, accounting, nursing, medical assisting, administrative assistance, EMT, and automotive technology. Additionally, workforce training can always be offered in conjunction with the needs of one or more employers.

Options for expanding higher education in USLC should not be limited only to WWCC, however. Other options for the region include private and non-profit colleges, distance education partnerships, and development of a trade/tech school. TPMA recommends that the assigned lead for regional economic development connect with WWCC, other state partners, and explore options for distance education partnerships to determine potential options and, where necessary, serve as a liaison with the business community.

Table 16. Summary of Expansion of Western Wyoming Community College in Evanston

Strengths	Challenges
 Expansion of healthcare training and internships related to substantial presence of WY State Hospital and Disabled Individuals Clinics	 Would require participation/partnership from private and public sector organizations  Would require buy-in from WWCC
 Addition of further higher education assets to the community	

³⁹ Little detailed information on enrollment or programs is available on the college website. These assumptions drawn from the Fall 2018 Course Schedule:

https://www.westernwyoming.edu/distance/evanston/pdf/schedule_fa18.pdf

Coworking Space

Relevant NAICS Code(s): 531120: Lessors of Nonresidential Buildings (except Miniwarehouses)

Cluster Group(s): Local Real Estate, Construction & Development

Potential Sites: Evanston Historic Roundhouse and Railyards; Wyoming State Hospital

One of the central real estate assets of USLC is the Evanston Roundhouse, which currently provides 20,000+ square feet of available office space for individual or business rental in a historic renovated building with strong broadband internet. Ideally this space will host a mixture of office and professional companies. TPMA also recommends that a portion of the space be set aside as a coworking space, which will provide a low-cost office environment for remote workers and entrepreneurs. After years of flourishing in large cities, coworking spaces have recently been popping up in smaller towns across the country, for example, in Huntingburg, Indiana (population 6,100).⁴⁰ Coworking spaces can be established on a very affordable budget, particularly if a building is already outfitted as an office environment, and ongoing costs, such as rent, internet, printing fees, etc. are shared among members using a subscription model. Such a space could be established either via a public-private partnership between local cities and companies, or independently by an entrepreneur.

If such a space were established, the region's designated economic development lead should coordinate with the facility director to promote educational and entrepreneurial events such as coding classes, pitch competitions, and meet-ups. Though the initial economic impact of a co-working space is small, it has the potential to foster growth for local entrepreneurs and to facilitate connections and brainstorming, all of which could lead to large scale regional job creation.

Table 17. Summary of Coworking Space

Strengths	Challenges
 Collaboration of numerous remote workers and entrepreneurs which could result in further business growth	 Could be difficult to market to and recruit Salt Lake residents
 Strong broadband	
 Could attract tech workers and sales workers from Salt Lake area who wish to escape the city	 Not a strong money-producing enterprise in and of itself

⁴⁰ Matthew Crane, "Knies joins Current Blend as community coordinator."

<https://www.duboiscountypress.com/knies-joins-current-blend-community-coordinator/>.

Automotive Repair Shop

Relevant NAICS Code(s): 811111: General Automotive Repair; 811112: Automotive Exhaust System Repair; 811113: Automotive Transmission Repair; 811118: Other Automotive Mechanical and Electrical Repair & Maintenance

Cluster Group(s): Local Motor Vehicle Products & Services

Potential Sites: Retail/Industrial Space near I-80

Though the region currently has some local automotive repair, there are fewer than 60 jobs in the sector putting employment 32% below the national average in terms of per capita employment.⁴¹ While businesses in this industry do not employ large numbers of workers, nor do they pay exceptionally high wages, it is important that the region provide enough of the essential local services so that residents do not need to drive outside of the region. Using Emsi data, TPMA estimates that \$3.2 million in spending is lost annually due to undersupply of such services.⁴²

In addition, if the business is placed in a location near I-80 with good visibility, the opportunity exists to generate business due to car and truck break-downs along the freeway. For this same reason, any company that follows such a plan should also offer towing services or be partnered with a local towing company.

Table 18. Summary of Automotive Repair Shop

Strengths	Challenges
<ul style="list-style-type: none"> + Remarkably low employment for the area in these industries (<20 workers in 2017) + Proximity to I-80 could draw traffic from drivers in need of repairs 	<ul style="list-style-type: none"> - Fairly low-pay industry - Workforce requires specific, technical training not offered in the area

⁴¹ Emsi 2019Q1

⁴² Ibid.

Expansion of Local Services

Relevant NAICS Code(s): 812320: Drycleaning and Laundry Services (except Coin-Operated); 561720: Janitorial Services; 811212: Computer and Office Machine Repair and Maintenance; 812331: Linen Supply; 541213: Tax Preparation Services; 522130: Credit Unions; 713940: Fitness and Recreational Sports Centers; 443141: Household Appliance Stores; 561740: Carpet and Upholstery Cleaning Services; 532310: General Rental Centers

Cluster Group(s): Local Commercial Services; Local Financial Services; Local Household Goods and Services; Local Industrial Products and Services

Potential Sites: Evanston Historic Roundhouse and Railyards; Fill vacancies in various downtown areas: Evanston, Kemmerer, Mountain View & Lyman

Local services, such as those listed in the paragraph above, are critical to communities for a variety of reasons. Such businesses often serve as tenants in small- to medium- sized downtown buildings, which contributes to community vibrancy and helps support local restaurants and retail. The existence of local services also contributes to a quality of life that both attracts and retains residents. Finally, many of the service jobs offered by such companies serve as critical work experience for entry-level workers. Each of the service industry options listed above were selected by TPMA based on either a below average location quotient, an indication of resident out-of-region spending, presence of such services in cities of similar size, or some combination of all three factors. Any entrepreneur considering starting such a business would need to conduct their own feasibility analysis to see if a profitable opportunity exists.

Table 19. Summary of Expansion of Local Services

Strengths	Challenges
<ul style="list-style-type: none"> + Undersupply of these services relative to selected cities of similar sizes + Could add to vibrancy of downtown communities + Some industries could potentially serve as contractors for oil, gas and coal companies 	<ul style="list-style-type: none"> - Fairly low employment numbers per each organization - Requires risk from a local entrepreneur

Expansion of Local Retail

Relevant NAICS Code(s): 453210: Office Supplies and Stationery Stores; 451110: Sporting Goods Stores; 446191: Food (Health) Supplement Stores; 443141: Household Appliance Stores; 442110: Furniture Stores; 446120: Cosmetics, Beauty Supplies, and Perfume Stores; 453910: Pet and Pet Supplies Stores; 444120: Paint and Wallpaper Stores; 453310: Used Merchandise Stores; 453110: Florists; 811113: Automotive Transmission Repair; 811191: Automotive Oil Change and Lubrication Shops; 441110: New Car Dealers; 811192: Car Washes; 811112: Automotive Exhaust System Repair; 812112: Beauty Salons; 444110: Home Centers

Cluster Group(s): Local Commercial Services; Local Entertainment & Media; Local Food & Beverage Processing & Distribution; Local Household Goods & Services; Local Personal Services (Non-Medical); Local Real Estate, Construction, & Development; Local Retailing of Clothing and General Merchandise

Potential Sites: Fill vacancies in various downtown areas: Evanston, Kemmerer, Mountain View & Lyman

Local retail serves many of the same purposes as listed above for local services. In interviews conducted by the consulting team over the course of this project, the lack of retail and amenities has been noted as a detriment to the region in past site visits by prospective companies. Each of the retail industry options listed above were selected by TPMA based on either a below average location quotient, an indication of resident out-of-region spending, presence of such services in cities of similar size, or some combination of all three factors. Any entrepreneur considering starting such a business would need to conduct their own feasibility analysis to see if a profitable opportunity exists.

Any initiative in local retail must be considered carefully in light of recent industry shifts in brick-and-mortar retail vs. ecommerce (such as Amazon). Though ecommerce has certainly harmed local retail on the balance, it would be an overstatement to conclude that local retail is dead. Twenty years ago, many speculated that big box retailers would put local retail out of businesses, which has turned out to be an overstated phenomenon. In response to such industry challenges, retailers are finding ways to make the retail experience special. Also termed "retail-tainment," brick and mortar stores are finding creative ways to appeal to customers using unique retail experiences that cannot be replicated online.⁴³

Table 20. Summary of Expansion of Local Retail

Strengths	Challenges
 Potential undersupply of these retail types relative to selected cities of similar sizes	 Fairly low employment numbers per each organization
 Would add to vibrancy of downtown communities	 Requires risk from a local entrepreneur
	 A Home Center would require "big box" retail location

⁴³ Mike Austin, "Utilizing 'Retailtainment' As an Extension of E-Commerce." August 20, 2018, <https://www.retailtouchpoints.com/features/executive-viewpoints/utilizing-retailtainment-as-an-extension-of-e-commerce>.

Tourism Industry Opportunities

Boutique Hotels is summarized in Chapter 5. Target Industry Implementation Outlines.

Fossil Hunting Tourism

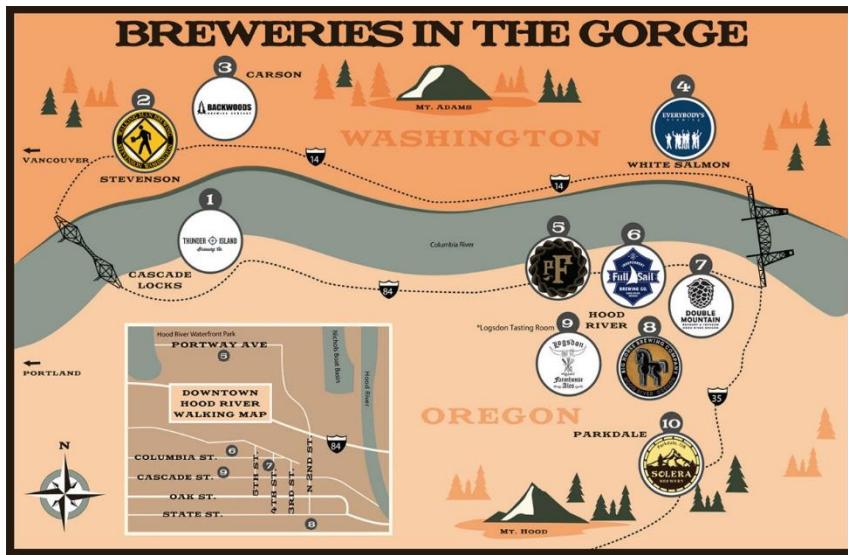
Relevant NAICS Code(s): 713990: All Other Amusement & Recreation Industries

Cluster Group(s): Hospitality & Tourism

Potential Sites: Privately operated fossil digging sites in Uinta and Lincoln Counties

Several unique regional amenities build the case for developing the fossil tourism industry including Fossil Butte Monument, the variety of privately-operated fossil digging sites near Kemmerer, and the handful of fossil shops in downtown Kemmerer. Though these amenities are largely underutilized currently, their potential economic impact to South Lincoln County should not be underemphasized. The option for visitors to have hands-on involvement in fossil digging is a unique amenity that is largely unavailable in other locations of the United States.

Figure 9. Example of Co-Marketed Trail Concept, using Breweries in the Gorge



To maximize on this opportunity TPMA recommends that regional stakeholders' approach each of the private entities involved in this cluster and see if they are willing to contribute some funds to co-marketing their organizations to visitors. TPMA recommends the region adopt a lesson from regions with thriving craft beverage tourism industries in developing a map which features each stop on the "trail" (see Figure 9). Furthermore, TPMA recommends that a designated economic development lead pro-actively contact travel tourism outlets such as Outdoor Magazine or the Travel Channel, to generate interest in featuring the "Fossil Tour" in a written publication or a television program. Lastly, research indicates that the single biggest factor in tourism economics is the size of the surrounding population. In this respect, Wyoming does not rate highly among other potential tourist destinations. However, if the Fossil Tour were advertised in outlets where visitors have already come from outside of the region, such as Jackson and

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Yellowstone National Park, the region could significantly enhance traffic. Similarly, entrepreneurs in Tennessee have successfully built upon the Great Smokey Mountains National Park, with assets such as Dollywood and the City of Gatlinburg to augment further tourism traffic.

Table 21. Summary of Fossil Hunting Tourism

Strengths	Challenges
<ul style="list-style-type: none"> + Rare opportunity to dig and keep fossils + Under-advertised outside of the area + Building on outdoor family vacation cluster established by Yellowstone NP, Flaming Gorge and other assets 	<ul style="list-style-type: none"> - Requires buy-in and coordination from multiple private land-owners

National Chain Hotel

Relevant NAICS Code(s): 721110: Hotels (except Casino Hotels) and Motels

Cluster Group(s): Hospitality & Tourism

Potential Sites: Kemmerer near the Hams Fork River

Narrative:

For a small town, the city of Kemmerer has an outsized share of reasons to visit, including the JC Penney Store #1, Fossil Butte National Monument, and Hams Fork River to name a few. Due the presence of multinational mining and energy companies in and around south Lincoln County, the region also receives a degree of business traffic unusual for a town of its size. Currently, Kemmerer is host to a Best Western and a handful of locally operated motels. Enough demand may exist to justify another national economy or midscale hotel chain (e.g. Econo Lodge, Howard Johnson, Comfort Inn, Holiday Inn, etc.) That said, TPMA did not conduct a detailed feasibility analysis on this opportunity, which would be warranted for any operator or corporation before such an effort were undertaken. Like the boutique hotel concept previously mentioned, a national hotel chain, will judge such an opportunity based on statistics and risk, and not based on speculative opportunity. To pursue such an opportunity, TPMA first recommends that the regional economic development lead obtain statistics on the number of visitors and spending within Kemmerer. If such statistics are not available locally or through the Wyoming Office of Tourism various third-party companies maintain such datasets, such as STR Global.⁴⁴

Table 22. Summary of National Chain Hotels

Strengths	Challenges
<ul style="list-style-type: none"> + Proximity to recreational amenities + Draw on traffic to Fossil Butte and JC Penny #1 Store + Could minorly increase tourism traffic 	<ul style="list-style-type: none"> - Potential oversaturation of market could cause closure of marginal locally owned hotels - Industry offers very low wages to workers - Potentially poor compliment to downtown area

⁴⁴ <https://www.strglobal.com/>.



7. RESEARCH & INVENTORIES ANALYSIS

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The following is a labor market and industry sector profile for Uinta County, WY and South Lincoln County, WY. South Lincoln County is regionally defined as the communities of Kemmerer, Diamondville, Opal, Labarge, and Cokeville. This is a demographic and economic analysis of the factors that affect the Uinta County and South Lincoln County economies and was used as a basis for the target industry study. Though 2018 is the calendar year, as of the production of this report, 2017 labor market data are utilized as these represent the latest full calendar year of data available from federal statistical agencies.

The quantitative data for the profile includes a geographic overview, demographic and labor force characteristics, industry analysis, occupation analysis, and labor force data. For the profile, the project team collected and analyzed data from Economic Modeling Specialists Int'l. (Emsi), the U.S. Census Bureau, and the U.S. Bureau of Labor Statistics.

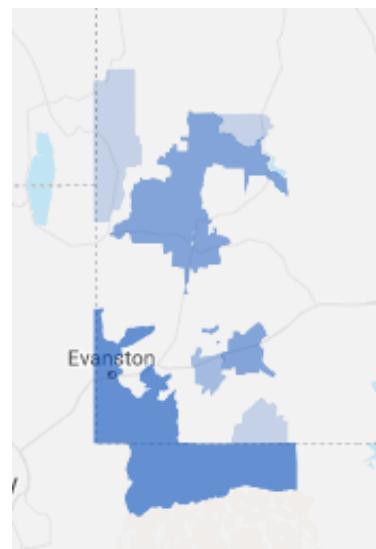


Figure 10. ZIP Codes in Uinta & South Lincoln Counties

Demographics

Population Trends by City

The chart below illustrates population growth for seven larger communities in Lincoln and Uinta Counties. All individual communities experienced population growth since 2007. Evanston and Lyman were the first and third largest communities based on total population but had the lowest rates of growth. Kemmerer had the second largest population and growth rates similar to Cokeville, Diamondville, and La Barge. Each community experienced some growth between 2007 and 2017 though Lyman demonstrated the lowest rate of growth at only 1.9% during this period. Besides Lyman, the only other two communities with single digit growth rates were Evanston and Mountainview with 3.1% and 3.3% growth respectively.

Figure 11. Population Growth by City

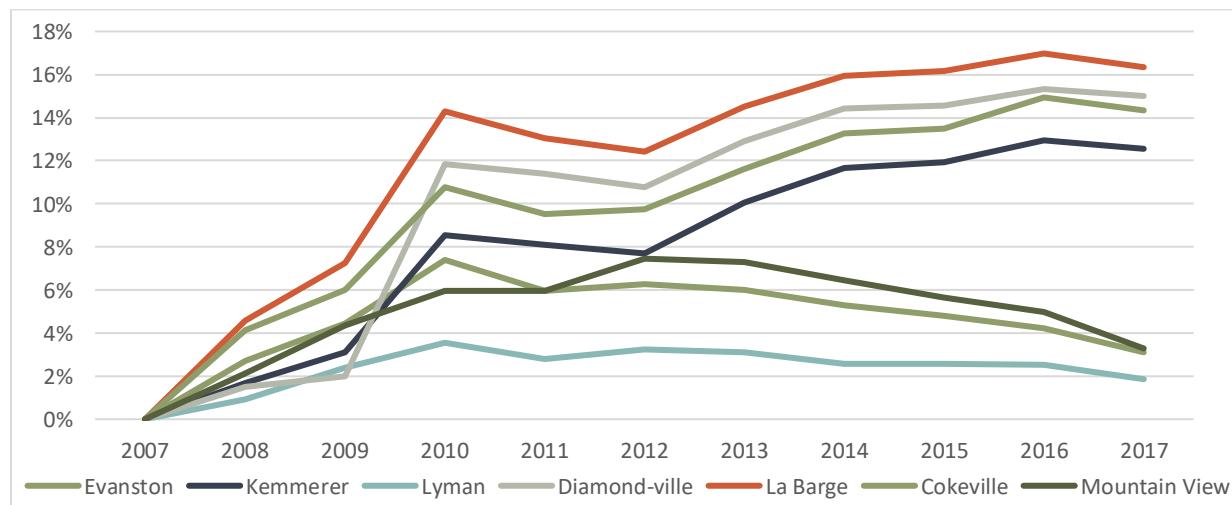


Table 23. Population Growth by Community

Time Frame	Evanston	Kemmerer	Lyman	Mountain View	Diamond-ville	La Barge	Cokeville
2007	11,509	2,441	2,029	1,221	659	483	482
2008	11,821	2,482	2,048	1,247	669	505	502
2009	12,021	2,517	2,078	1,274	672	518	511
2010	12,360	2,650	2,101	1,294	737	552	534
2011	12,197	2,639	2,086	1,294	734	546	528
2012	12,232	2,629	2,095	1,312	730	543	529
2013	12,198	2,687	2,092	1,310	744	553	538
2014	12,117	2,726	2,081	1,300	754	560	546
2015	12,062	2,732	2,081	1,290	755	561	547
2016	11,994	2,757	2,080	1,282	760	565	554
2017	11,866	2,747	2,067	1,261	758	562	551
07 to '17 % Change	3.1%	12.5%	1.9%	3.3%	15.0%	16.4%	14.3%

Population by Age Group

Uinta and South Lincoln Counties (USLC), are located in southwestern Wyoming. The population of the region increased from 26,183 to 26,357 over the past ten years.⁴⁵ This represents a 0.66% increase, which is lower than the state's growth rate of 10.3% and the national growth rate of 8.0%. Looking forward from 2017, the region's population is projected to continue to increase 0.62% over the next five years. Most of this growth will be among older age cohorts of people older than age 65. This growth is partially offset by declines in the population of people age 20-34 and 55-64 which suggests USLC has an aging population.

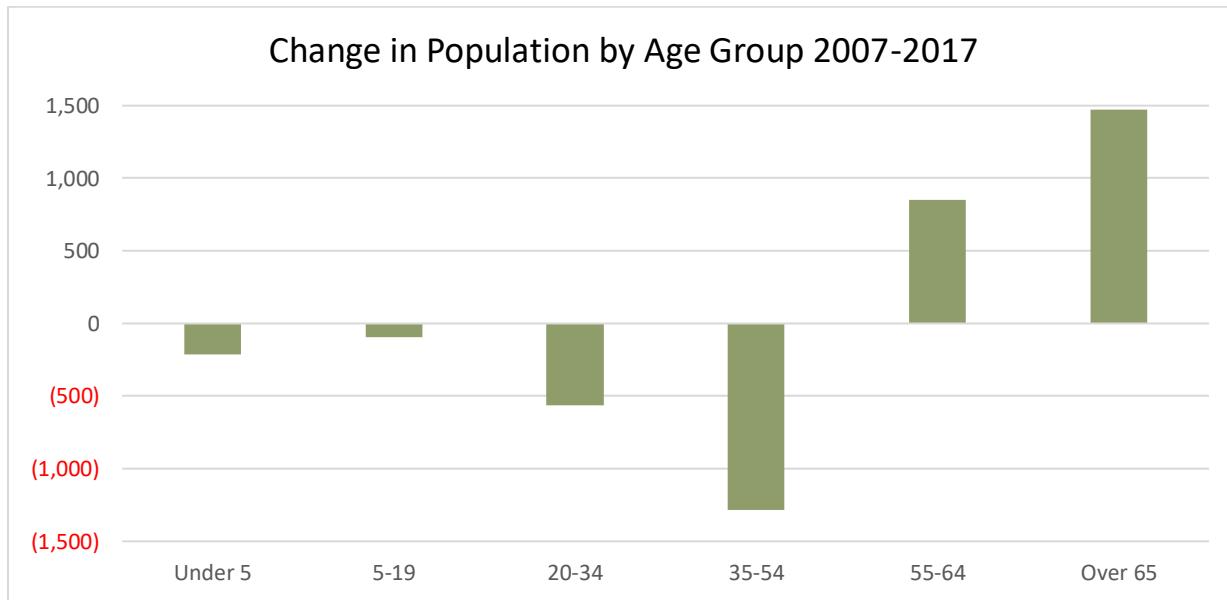
The USLC's aging population is not a new trend. Over the past ten years, the population of people 55 years and older increased significantly, while the population decreased for people ages 5-19, 20-34, and 35-54. The aging population is a concern for the economy because it will impact the availability of labor over the next decade.

Table 24. Population by Age Group

Age	2007	2017	Change	% Change	Projected Change	
	Population	Population	2007-2017	2007-2017	2017-2022	
Under 5	2,204	1,994	(210)	(10%)	(4)	(0%)
5-19	6,239	6,147	(91)	(1%)	49	1%
20-34	4,905	4,341	(563)	(11%)	(219)	(5%)
35-54	7,545	6,258	(1,286)	(17%)	1	0%
55-64	2,966	3,820	854	29%	(543)	(14%)
Over 65	2,325	3,796	1,471	63%	878	23%
Total	26,184	26,356	172	1%	163	1%

⁴⁵ EMSI Analyst, 2018.3

Figure 12. Change in Population by Age Group, 2007- 2017



Race/Ethnicity

The population of USLC is predominately White, with 88% identifying as White in 2017, followed by 8% identifying as Hispanic. The top three fastest growing race/ethnicity groups are Black, Asian, and Hispanic.⁴⁶

Table 25. Population by Race/Ethnicity

Race/Ethnicity	2017 Population	Change 2007-2017	% Change 2007-2017
White	23,197	(323)	(1%)
Hispanic	2,194	287	15%
Asian	120	59	97%
Two or More Races	386	40	12%
American Indian or Alaskan Native	204	(36)	(15%)
Black	217	146	206%
Native Hawaiian or Pacific Islander	40	2	5%

Educational Attainment

Compared to Wyoming and the United States, USLC has a higher percentage of those with a High School Diploma or less. The area trails Wyoming and US averages in the proportion of the population with a Bachelor's degree or higher. USLC exceeds the nation in proportion of population with "Some College," indicating a large opportunity for local education providers to provide services to non-traditional students who have not completed a degree.

⁴⁶ The Hispanic population includes Hispanics in White, Black, Two or More Races, Asian, American Indian or Alaskan Native, Native Hawaiian, or Pacific Islander.

Table 26. Population by Educational Level

Education Level	2017 Uinta and Lincoln Counties Population	2017 Uinta and Lincoln Counties Percent	2017 Percent Wyoming	2017 Percent US
Less Than 9th Grade	914	4%	3%	6%
9th Grade to 12th Grade	1,529	6%	6%	8%
High School Diploma	9,326	36%	30%	28%
Some College	6,594	25%	26%	21%
Associate's Degree	2,411	9%	10%	8%
Bachelor's Degree	3,701	14%	17%	18%
Graduate Degree and Higher	1,418	5%	9%	11%

Income

Uinta County has a higher poverty rate than Wyoming and the United States while Lincoln County has a lower poverty rate.⁴⁷ Evanston and Fort Bridger have the highest poverty rates in the two counties, while Robertson has the lowest poverty rate as no residents live in poverty. Cokeville has the second lowest poverty rate at 2.7%. Trends for median household income are similar.

Uinta County has a median household income that is less than Wyoming and the United States while Lincoln County's median household income is greater than Wyoming and the United States. Cokeville has the largest median household income of all included communities at \$77,500. The median household income of Robertson is \$2,375 more than that of Lyman which has the second highest median household income.

Table 27. Income & Poverty by Community 2012-2016 5-Year Estimates

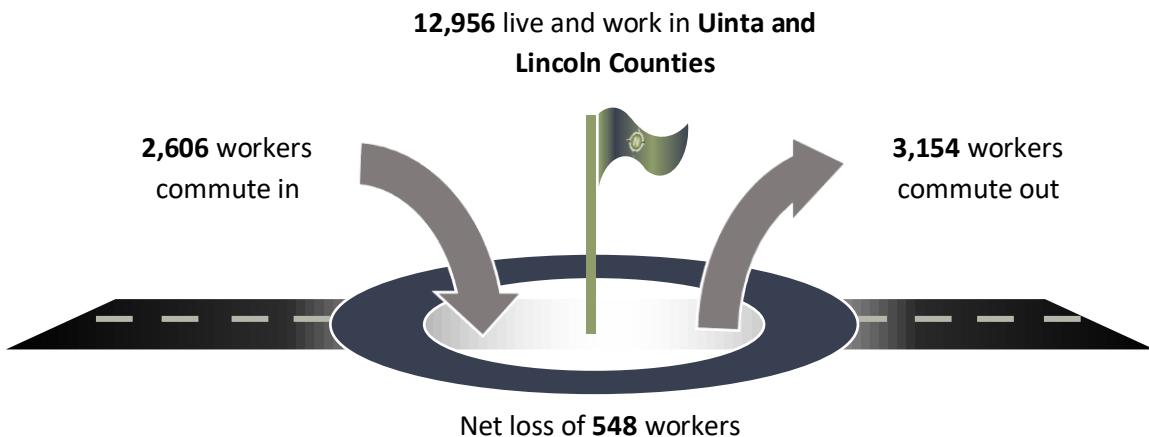
Location	Median Household Income 2012-2016	Poverty Rate	Population (2012-2016)
Uinta County	\$53,323	16.8%	20,893
Lincoln County	\$64,579	8.8%	18,543
Evanston	\$45,313	21.7%	12,179
Lyman	\$75,875	13.1%	2,197
Mountain View	\$56,447	13.4%	1,333
Kemmerer	\$62,992	5.1%	2,710
Cokeville	\$77,500	2.7%	555
Diamondville	\$68,984	8.5%	622
La Barge	\$61,667	11.4%	386
Opal	\$59,375	5.7%	105
Wyoming	\$59,143	11.6%	583,029
United States	\$55,322	15.1%	318,558,162

⁴⁷ U.S. Census Bureau 2012-2016

Commuting

In 2017, Uinta and Lincoln Counties had 2,606 workers commuting into both counties and 3,154 commuting out. This means together, Uinta and Lincoln counties are slight net exporters of commuters.⁴⁸ However, the vast majority of workers (12,956) both lived and worked within the counties.

Figure 13. Regional Commuting Information



Commuting Pattern Maps

The following charts and figures demonstrate where most residents of Uinta and Lincoln counties commute for work, and which other counties have significant number of residents commuting into Uinta and Lincoln counties.

⁴⁸ Wyoming Department of Workforce Services, Wyoming Intercounty Commuting Report, 2017.

Uinta County Commuting Patterns

The majority of Uinta County's working residents are employed within Uinta County. In fact, in 2017, 82.8% of the county's workforce was employed within Uinta. Of all counties other than Uinta, Sweetwater receives the largest number of out-commuters, with 949. Sweetwater also offers the largest number of in-commuters with a known county of residence, with 209.

Figure 14. Out-Commuters from Uinta County

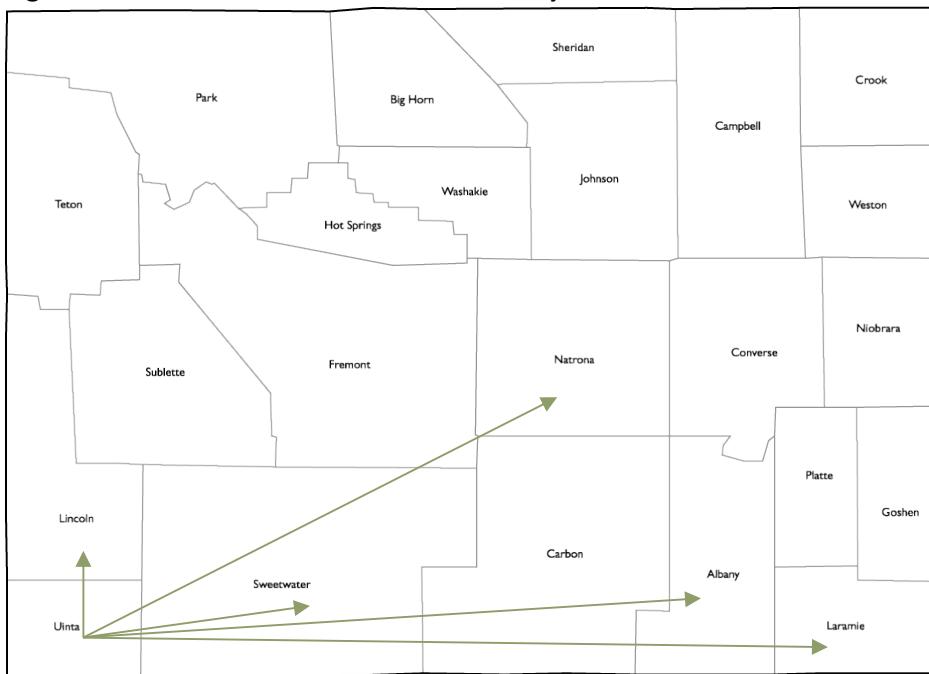


Table 28. Out-Commuters from Uinta County

County of Employment	Total	%
Uinta	7,433	82.8
Total Outflow	1,540	17.2
Sweetwater	946	10.5
Lincoln	172	1.9
Natrona	66	0.7
Laramie	58	0.6
Albany	54	0.6
Unknown	114	1.3
Total, All Uinta County Residents	8,973	100

Figure 15. In-Commuters to Uinta County

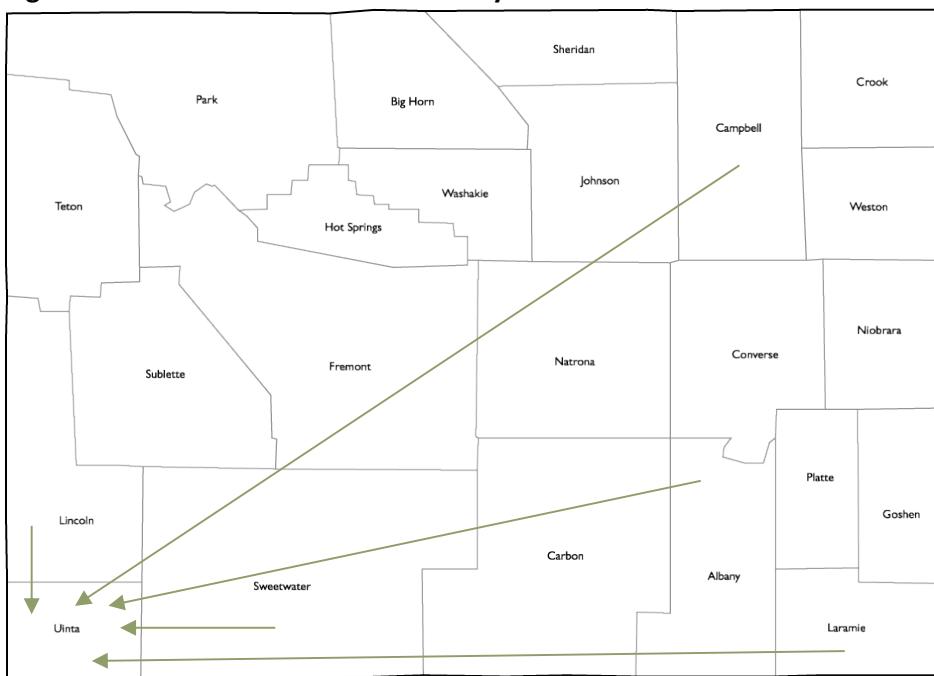


Table 29. In-Commuters to Uinta County

County of Residence	Total	%
Uinta	7,433	82.8
Total Inflow	1,681	18.4
Sweetwater	209	2.3
Lincoln	166	1.8
Laramie	41	0.4
Campbell	39	0.4
Albany	36	0.4
Unknown	868	9.5
Total Persons Working in Uinta County	9,114	100

Lincoln County Commuting Patterns

Similar to Uinta County, the majority of Lincoln County's working residents are employed within Lincoln County, equivalent to 72.6% of the county's workforce. Of all counties other than Lincoln, Teton receives the largest number of out-commuters, with 1,170. While, Uinta offers the largest number of in-commuters with a known county of residence, with 172. Though we do not know precisely where the in and out commuters reside, it is safe to assume that the majority of out-commuters headed to the Jackson area live in northern Lincoln County. Likewise, it likely that the majority of in-commuters from Uinta are headed to south Lincoln County.

Figure 16. Out-Commuters from Lincoln County

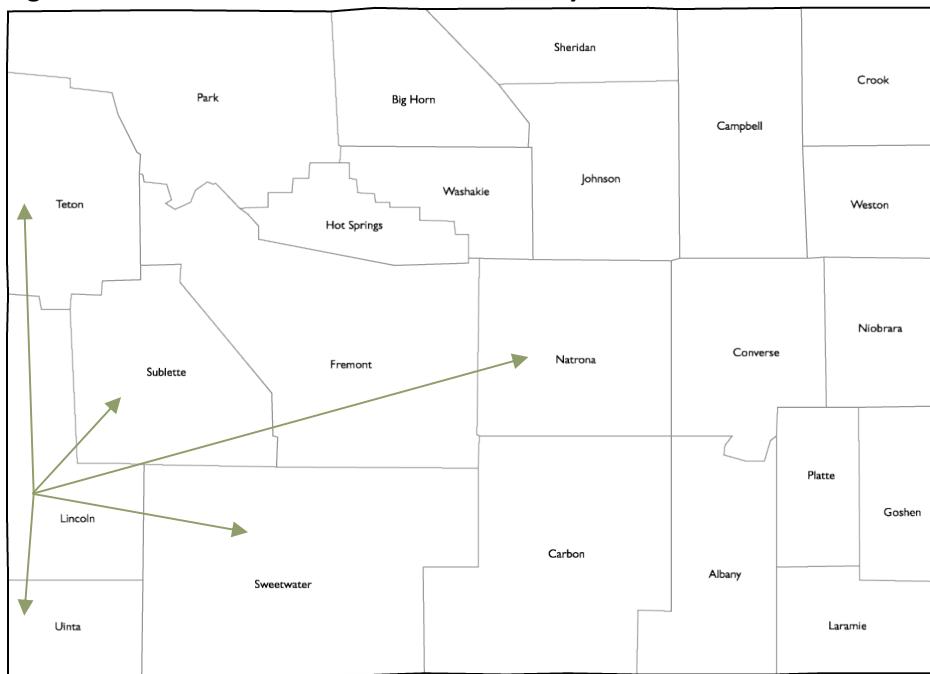


Table 30. Out-Commuters from Lincoln County

County of Employment	Total	%
Lincoln	5,185	72.6
Total Outflow	1,952	27.4
Teton	1,170	16.4
Uinta	166	2.3
Sweetwater	159	2.2
Sublette	119	1.7
Natrona	43	0.6
Unknown	79	1.1
Total, All Lincoln County Residents	7,137	100

Figure 17. In-Commuters to Lincoln County

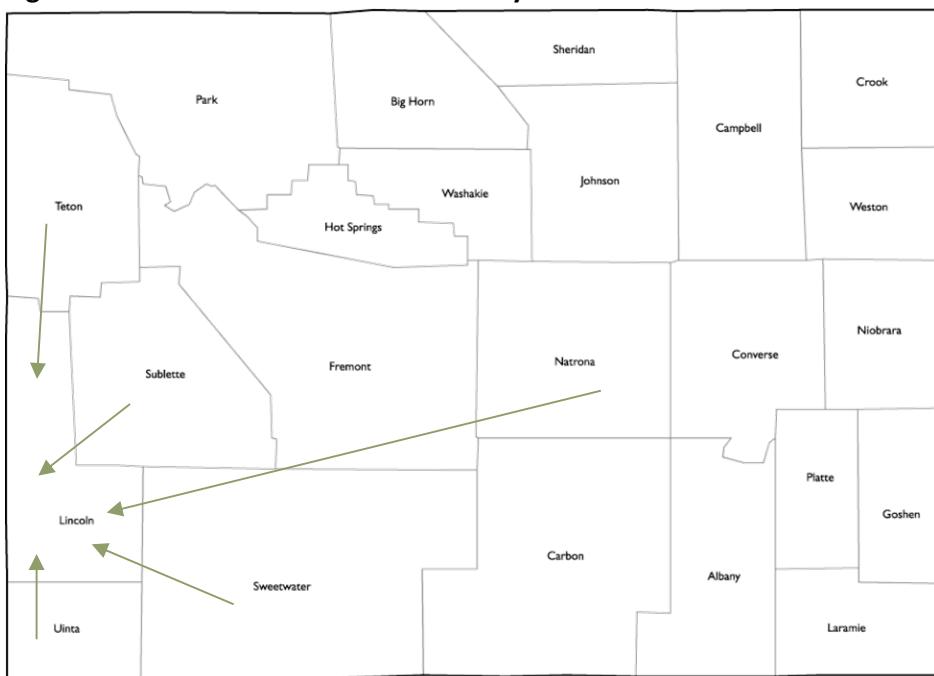


Table 31. In-Commuters to Lincoln County

County of Residence	Total	%
Lincoln	5,185	80.4
Total Inflow	1,263	19.6
Uinta	172	2.7
Teton	141	2.2
Sublette	104	1.6
Sweetwater	42	0.7
Natrona	33	0.5
Nonresidents	664	10.3
Total Persons Working in Lincoln County	6,448	100

Migration Patterns

Beyond simply tracking population change, it is helpful to understand underlying patterns leading to population change. Using data from the Internal Revenue Service (IRS), TPMA is able to determine a high-level summary of county by county migration patterns.⁴⁹ These statistics are based on address change data between 2015 and 2016. The listed quantities refer to form 1040 tax returns, which could represent individuals or couples filing jointly. Additionally, each tax form could include any number of dependents. Therefore, the quantities listed below, refer to tax payers (either groups or individuals) but these do not easily translate to population counts. To provide an idea of scale, TPMA produces an “annual churn” estimate, which is the proportion of total tax payers either coming or going, in proportion to the total number of tax payers. In addition to displaying relocating tax payers, these data also display the total adjusted gross income (AGI) for the coming and going parties, which can indicate whether each region is increasing or decreasing in economic strength.

Table 32. Net Migration to and from Uinta & Lincoln Counties

	----Net In-Flow----		----Net Out-Flow----		--2015-2016 Change--	
	Tax Paying Units	AGI (\$ Thousands)	Tax Paying Units	AGI (\$ Thousands)	Annual Churn	Change in AGI
Uinta	494	\$27,667	516	\$35,634	12.3%	(\$7,967)
Lincoln	570	\$39,534	435	\$22,723	13.9%	\$16,811
Uinta & Lincoln Counties	1,064	\$67,201	951	\$58,357	13.1%	\$8,844
Wyoming	16,347	\$1,086,385	18,288	\$979,960	13.9%	\$25,655

The IRS data indicate that in 2016 Uinta lost more tax payers than it gained (by a margin of 22); whereas Lincoln County gained 135 tax payers. Likewise, Uinta County lost roughly \$8.0 million in adjusted gross income (AGI) due to outmigration, and Lincoln gained \$16.8 million in AGI. Annual Churn is fairly comparable in the counties and the state of Wyoming, ranging from 12.3% to 13.9%.

Uinta County has frequent interchange of residents from Sweetwater County (to the east of Uinta) as well and a handful of Utah counties, most notably Salt Lake, Davis, and Weber. Lincoln County drew marginally more residents from Teton County (to the north of Lincoln County), as well as Salt Lake County, Utah. Lastly, there is also a noteworthy flow of tax payers moving from Uinta County to Lincoln County (23).

⁴⁹ Internal Revenue Service, Statistics of Income (SOI), 2015-2016, <https://www.irs.gov/statistics/soi-tax-stats-individual-income-tax-statistics-2016-zip-code-data-soi>. Accessed January 9, 2019. Any county that gained or lost fewer than 20 taxpayers is not displayed by the IRS for confidentiality purposes.

Table 33. Uinta County, Top Migrating Regions

County	Number of In-Migrants	County	Number of Out-Migrants
Sweetwater County, WY	52	Salt Lake County, UT	50
Salt Lake County, UT	30	Sweetwater County, WY	38
Weber County, UT	23	Lincoln County, WY	23
Other counties in Wyoming	75	Davis County, UT	22
Other counties not in Wyoming	298	Weber County, UT	20
		Other counties in Wyoming	82
		Other counties not in Wyoming	281

Table 34. Lincoln County, Top Migrating Regions

County	Number of In-Migrants	County	Number of Out-Migrants
Teton County, WY	52	Teton County, WY	34
Salt Lake County, UT	30	Sweetwater County, WY	30
Uinta County, WY	23	Sublette County, WY	23
Other counties in Wyoming	99	Salt Lake County, UT	21
Other counties not in Wyoming	366	Other counties in Wyoming	57
		Other counties not in Wyoming	270

Human Capital

Labor Force

Labor force statistics include both the employed and the unemployed, excluding only those who have stopped looking for work (discouraged workers) and those who are voluntarily not in the labor force. In August 2018, 17,521 individuals participated in the Uinta and Lincoln Counties' labor force; of these, 16,903 were employed and 618 were unemployed. Over the last 20 years, employment was at its highest in August 2007 and lowest in February 1999. As of August 2018, the unemployment rate was 3.5% which is less than the unemployment rate of Wyoming (3.9%) and the United States (3.9%).

Table 35. Employment in Uinta & Lincoln Counties, 1998- 2018⁵⁰

Peak	August 2007 (20,220)	August 2018 (16,903–11.5% lower)
Trough	February 1999 (15,166)	August 2018 (16,903–16.4% higher)
August 2018	Employment: 16,903 Labor Force: 17,521 Unemployment rate: 3.5%	

Labor Force Participation Rate

The labor force participation rate is sensitive to demographic changes because participation rates vary across age, gender, income, and race/ethnicity.⁵¹ The national labor force participation rate has decreased since 2000, a trend that is expected to continue in the next decade in part due to the aging of the baby boomer generation. In 2000, baby boomers were the heart of the workforce. However, as this large group of individuals moves closer to retirement, the overall labor force participation rate decreases. It is worth mentioning that the participation rate of older workers has been increasing in the past ten years, but it is still significantly lower than those of the young adult and middle-aged groups.

Labor Force Participation Rate

The labor force participation rate represents the proportion of the population that is working or pursuing work, as opposed to those voluntarily not working or not pursuing work. The labor force participation rate is affected by various factors, including availability of jobs, socioeconomic composition of the population, demographics, as well as structural changes in the economy.

Workers in older age brackets and those who are retirement age compose a considerable proportion of the population of the two counties. The older worker population (55 to 64 years of age) was estimated to

⁵⁰ U.S. Bureau of Labor Statistics, 1998.3-2018.3. <http://www.bls.gov/data/>

⁵¹ For example, in 2015 the national labor force participation rate for individuals older than age 54 (40.0%) was significantly lower than for those between the ages of 25 and 54 (81.3%).

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be 3,650 in 2017, which is equivalent to 14% of the population.⁵² A large number of these older workers are expected to retire in the next ten years. As notably, those who are 65 years and older were estimated to total 4,674, also equivalent to 14% of the county's population. This means that over one quarter of the population is at or nearing retirement age.

Figure 18. Uinta & Lincoln County Compared to Wyoming Unemployment Rates (2007-2017 Annual Average)



Generally, unemployment tends to spike during recessions and following major layoffs, eventually settling to a more normal and stable rate as individuals adjust to the new availability of employment opportunities. Prolonged periods of unusually high unemployment are typically a signal that the supply of workers is not in balance with demand for workers.

The Bureau of Labor Statistics reports a precipitous decrease in unemployment in the two counties between 2010 and 2017. Over the period analyzed, the unemployment rate struck its peak in 2010 at 7.6% and dipped to its lowest rate in January 2017 at 4.1%. The unemployment rate for the state of Wyoming followed a similar trend as the region between 2010 and 2017, though the story at the state level was more positive until 2016, when the state's rate became slightly higher than that of the two-county area. For Wyoming, the unemployment rate hit its highest mark in 2010 at 6.4% and its lowest mark in 2014 at 4.1%.

⁵² The older worker population (55 years and older) in the region is estimated by multiplying the population of this age group by the corresponding labor force participation rate.

Economic Base

This section examines Uinta and South Lincoln Counties' largest industries and businesses, past industry growth, projected growth, concentration, and competitiveness. Analysis of industries occurs at 2-digit and 4-digit NAICS levels. Past industry growth looks at industry data from 2012 to 2017 and projected growth looks forward to the next five years to 2022. Concentration of an industry is identified based on Location Quotients which also demonstrate regional specialization in a certain industry. Industry Competitiveness is measured based on shift/share analysis which quantifies growth in the region due to regional advantages.

Industry Sector Analysis

To this point, the analysis of USLC has focused on the socioeconomic characteristics of the population. Socioeconomic data are useful in understanding the economy, but to truly comprehend economic dynamics we must also analyze industry data. Industry data are classified according to the types of goods and services that are rendered by businesses. These data indicate past and projected growth trends by sector and reveal sectors in which the region is well suited to be competitive.

A chart and several tables are displayed related to industry data. Each of the figures show data that descend in order according to 2017 employment. Other data displayed include: employment growth over the past five years, forecasted growth over the next five years, growth due to competitive effect (CE), and location quotient (LQ).

The *competitive effect* helps to determine the amount of job growth that occurred due to the region's competitive advantages as compared to the national growth in general and the national growth rate for each sector. In other words, a positive number indicates that the region experienced more growth than was expected.

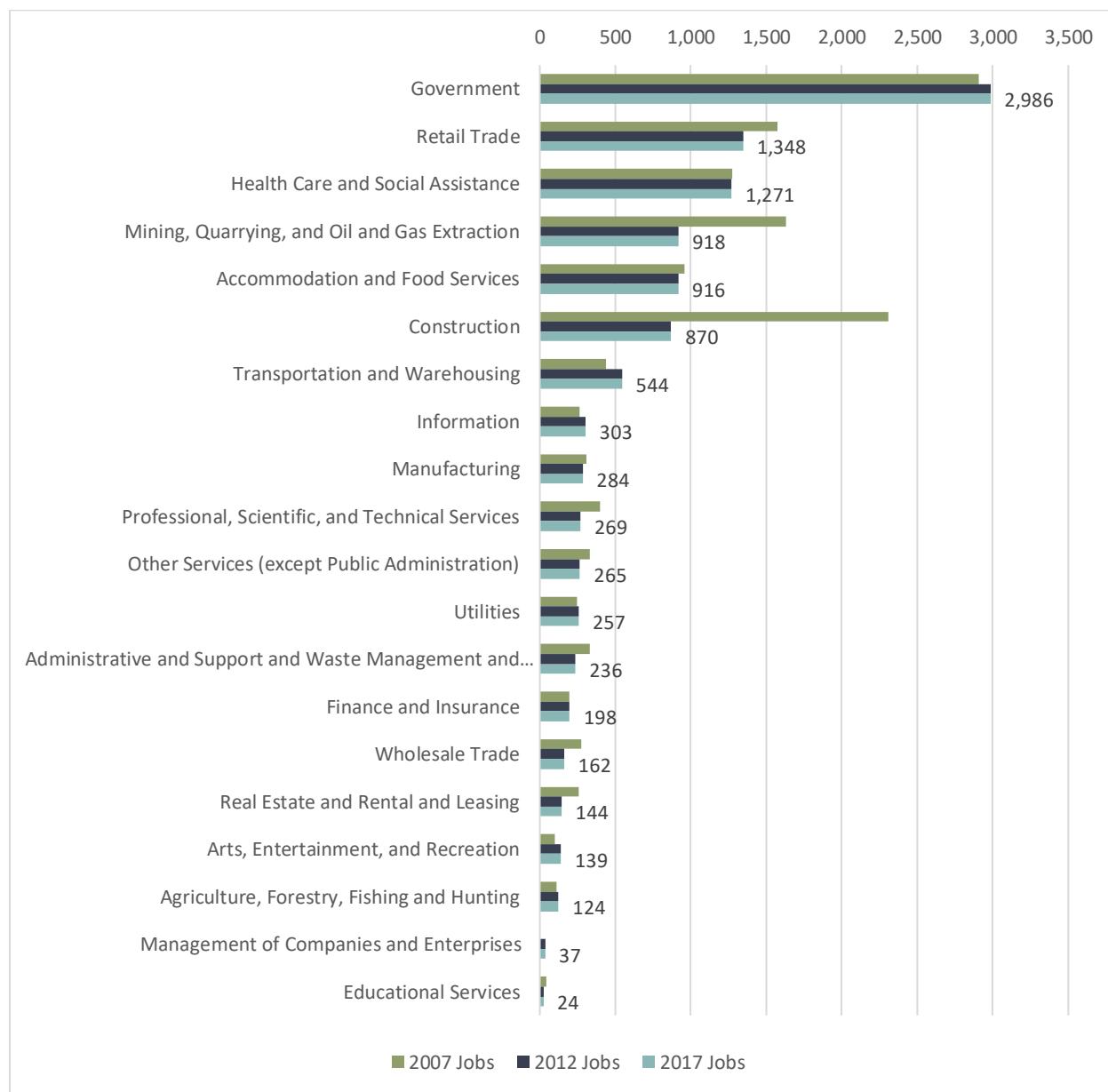
Location Quotient (LQ) measures how concentrated or specialized an industry is in a particular region and helps to demonstrate what makes a particular region's economy unique. A number greater than 1.25 indicates that the particular sector is considerably more concentrated than the national average. It also typically indicates that local demand for the products and/or services produced by that industry have been met and the industry is likely exporting products and/or services outside of the region. In other words, these may be industries that are bringing money into the region, rather than circulating money already present within the region.⁵³

⁵³ Data from this section are from Economic Modeling Specialists International (EMSI), 2018.3 Class of Worker.

Industry Mix

The broad industry sectors in USLC employing the most workers are Government (2,986, 26.4%); Retail Trade (1348, 11.9%); Healthcare and Social Assistance (1,271, 11.3%); and Mining, Quarrying, and Oil and Gas Extraction (918, 8.1%). The top three industries; Government, Retail Trade, and Healthcare and Social Assistance all grew slightly in the past five years, with Government experiencing the most growth. Mining, Quarrying, and Oil and Gas Extraction lost 327 employees or over a quarter of the industry's employment over the same period. Other industries experiencing significant decline from 2012-2017 (losses of over 100 jobs) include: Construction (-431), Professional, Scientific, and Technical Services (-135), Other Services (except Public Administration) (-121), and Wholesale Trade (-112).

Figure 19. Uinta and South Lincoln Counties Jobs 2-digit Industry Sector



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In terms of past growth, Accommodation and Food Services added the most jobs since 2012 but Management of Companies and Enterprises and Arts, Entertainment, and Recreation experienced the most percent growth with 95% and 83% growth respectively.

Looking deeper into job change in the region, competitive effect reveals how many jobs were created or retained due to unique characteristics of the region. According to these data, Arts, Entertainment, and Recreation is the strongest (adding 53 jobs due to competitive effect). Other industries that performed well in Uinta and South Lincoln Counties than other regions in the United States include Management of Companies and Enterprises as well as Information. Looking at both location quotient scores and 2017 employment, the following industries are strongly concentrated in the region: Mining, Quarrying, and Oil and Gas Extraction; Government; and Utilities.

Table 36. 2-digit NAICS Employment

Industry	2012 Jobs	2017 Jobs	Change 2012 - 2017	% Change 2012-2017	Change 2017-2022	% Change 2017-2022	LQ	Comp. Effect
Government	2,956	2,986	30	1%	48	2%	1.74	(9)
Retail Trade	1,342	1,348	6	0%	(30)	(2%)	1.17	(77)
Health Care and Social Assistance	1,266	1,271	5	0%	30	2%	0.89	(143)
Mining, Quarrying, and Oil and Gas Extraction	1,245	918	(327)	(26%)	(84)	(9%)	20.51	(56)
Accommodation and Food Services	852	916	64	8%	(3)	(0%)	0.95	(66)
Construction	1,301	870	(431)	(33%)	(220)	(25%)	1.41	(654)
Transportation and Warehousing	498	544	46	9%	15	3%	1.37	(44)
Information	272	303	31	11%	40	13%	1.45	16
Manufacturing	325	284	(41)	(13%)	18	6%	0.32	(56)
Professional, Scientific, and Technical Services	404	269	(135)	(33%)	(40)	(15%)	0.37	(187)
Other Services (except Public Administration)	386	265	(121)	(31%)	(3)	(1%)	0.49	(122)
Utilities	263	257	(6)	(2%)	(15)	(6%)	6.55	(11)
Administrative and Support and Waste Management and Remediation Services	301	236	(65)	(22%)	3	1%	0.34	(102)
Finance and Insurance	205	198	(7)	(3%)	9	5%	0.44	(18)
Wholesale Trade	274	162	(112)	(41%)	(16)	(10%)	0.38	(123)
Real Estate and Rental and Leasing	187	144	(43)	(23%)	(14)	(10%)	0.76	(64)
Arts, Entertainment, and Recreation	76	139	63	83%	21	15%	0.72	53
Agriculture, Forestry, Fishing and Hunting	126	124	(2)	(2%)	1	1%	0.92	(6)

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Industry	2012 Jobs	2017 Jobs	Change 2012 - 2017	% Change 2012-2017	Change 2017-2022	% Change 2017-2022	LQ	Comp. Effect
Management of Companies and Enterprises	19	37	18	95%	15	41%	0.23	15
Educational Services	26	24	(2)	(8%)	5	21%	0.08	(5)

Key Industries

Table 37 shows the 20 largest 4-digit North American Industrial Classification System (NAICS) industries in terms of employment in USLC in 2017. Of the top 20 largest industries, 8 added employment between 2012 and 2017. Support Activities for Rail Transportation experienced the highest growth rate of 94%. Traveler Accommodation did not add, nor lose any jobs in the last five years. Among these key industries, the highest projected growth to 2022 is within Specialized Freight Trucking, State Government, Excluding Education and Hospitals, and Child Day Care Services.

Table 37. 4-digits NAICS Employment

Industry	2017 Jobs	Change 2012-2017	% Change 2012-2017	Projected Change 2017-2022	Projected % Change 2017-2022
Education and Hospitals (Local Government)	1,441	58	4%	58	4%
Local Government, Excluding Education and Hospitals	774	(4)	(1%)	32	4%
Restaurants and Other Eating Places	588	52	10%	1	0%
Utility System Construction	399	(361)	(48%)	5	1%
Oil and Gas Extraction	389	(126)	(24%)	4	1%
Gasoline Stations	384	(13)	(3%)	(20)	(5%)
Education and Hospitals (State Government)	376	3	1%	(30)	(8%)
General Merchandise Stores, including Warehouse Clubs and Supercenters	357	(25)	(7%)	5	2%
Coal Mining	280	10	4%	4	2%
Traveler Accommodation	251	0	0%	(12)	(5%)
Individual and Family Services	248	2	1%	7	3%
Electric Power Generation, Transmission and Distribution	239	(5)	(2%)	(12)	(5%)
Support Activities for Mining	224	(209)	(48%)	(175)	(44%)
Wired and Wireless Telecommunications Carriers	223	12	6%	7	5%
State Government, Excluding Education and Hospitals	167	(19)	(10%)	25	19%
General Medical and Surgical Hospitals	156	(26)	(14%)	(12)	(7%)
Child Day Care Services	152	(6)	(4%)	21	17%
Services to Buildings and Dwellings	133	9	7%	3	2%
Specialized Freight Trucking	130	(32)	(20%)	23	21%
Support Activities for Rail Transportation	130	63	94%	(23)	(15%)

Largest Businesses

The following list of largest employers is based on data provided from Uinta County's and Lincoln County's Economic Development Organizations. The largest noted employers are Uinta County School Districts #1, #4, and #6. Together, these school districts have 890 employees. The second largest employer in the region is Wyoming State Hospital, followed by Wal-Mart, and Westermoreland Kemmerer Mine. Businesses in Mining, Quarrying, & Oil & Gas Extraction make up 30% of the region's twenty largest businesses. Businesses in Healthcare & Social Assistance also make up a significant portion of this list at 20%, meaning that 50% of the top twenty employers are in involved one of these two industry groups.

Table 38. Largest Regional Businesses with Estimated Employment

Company	Industry	Employees
Uinta County School District #1,4,6	Education	890
Wyoming State Hospital	Healthcare & Social Assistance	400
Wal-Mart	Retail Trade	300
Westermoreland Kemmerer Mine	Mining, Quarrying, & Oil & Gas Extraction	292
Mountain Regional Hospital	Healthcare & Social Assistance	250
Evanston Regional Hospital	Healthcare & Social Assistance	200
Merit Energy	Mining, Quarrying, & Oil & Gas Extraction	200
Uinta County Government	Government	190
ExxonMobil	Mining, Quarrying, & Oil & Gas Extraction	180
Union Tank Car	Wholesale Trade	155
Union Telephone	Utilities	150
Pacificorp/Rocky Mountain Power	Utilities	150
Lincoln County School District #1	Education	148
South Lincoln Medical Center	Healthcare & Social Assistance	125
Hilcorp Inc.	Mining, Quarrying, & Oil & Gas Extraction	120
Lincoln County	Government	80
Williams Field Services	Mining, Quarrying, & Oil & Gas Extraction	35
Evanston Carbon Fiber	Manufacturing	40
Silver Eagle	Mining, Quarrying, & Oil & Gas Extraction	26
Fossil Industry (various)	Tourism	25

Workforce

An examination of occupational demand is separate and distinct from industry analysis because industries require a mix of occupations to function. For example, the Manufacturing sector employs occupations that might be traditionally defined as “manufacturing occupations” – called Production occupations at the broadest level of occupation classification. The Manufacturing sector, however, also employs managers, accountants, maintenance and repair personnel, and many other occupational categories necessary for the industry’s operation. As such, it’s important to understand the specific occupational roles that are required to keep local businesses functioning.

The occupational analysis that follows provides a view of the most critical occupations within Uinta and South Lincoln Counties from an overarching economic perspective and specifically related to some of the key industries that were highlighted previously.

Occupational Groups

Uinta and South Lincoln Counties’ 2-digit Standard Occupational Classification (SOC) System categories include:

- Office and Administrative Support Occupations (1,232 jobs)
- Construction and Extraction Occupations (1,101 jobs)
- Sales and Related Occupations (1,058 jobs)
- Education, Training and Library Occupations (1,006 jobs)

The median hourly earnings for all occupations range from \$10.23/hr. for Food Preparation and Serving Occupations to \$38.18/hr. for Management Occupations.

As noted in the industry analysis section, location quotient scores can indicate fields where the region has a strong competitive advantage over other regions in United States. Occupational categories where the region has a strong concentration of workers (above an LQ of 1.25) include

- Construction and Extraction Occupations (2.15)
- Installation, Maintenance, and Repair Occupations (1.85)
- Life, Physical, and Social Science Occupations (1.62)
- Education, Training, and Library Occupations (1.57)
- Healthcare Support Occupations (1.36)

These are the occupational groups for which the region is highly specialized. For example, jobs in Construction and Extraction Occupations make up more than twice the employment base than the national average.

Entrepreneurs & Contractors

Different occupational classifications come with a variety of employment arrangements from full-time work, to gig work, to side-employment paired with full-time jobs. Workers employed as entrepreneurs or contractors are classified as “self-employed.” Such workers are taking a larger degree of risk than wage & salaried workers, as their income cannot be counted on in the form of a regular paycheck. This risk also comes with the opportunity for greater reward, however, as these workers have more control over their own fate. Any region that wishes to grow its regional economy must know what its risk-taking populations are involved in, so it can enable them to succeed. Table 39 displays the number of workers by high-level (2-digit) occupational classification according to whether the workers are self-employed or wage & salaried.

Table 39. Self-Employment Characteristics by Occupational Group

Description	Ratio of Self-Employed to Wage & Salaried Workers	Self-Employed Workers	Wage & Salaried Workers	Median Hourly Earnings
Arts, Design, Entertainment, Sports, and Media Occupations	2.47	207	84	\$13.11
Management Occupations	1.99	912	459	\$16.95
Farming, Fishing, and Forestry Occupations	1.03	74	72	\$10.32
Business and Financial Operations Occupations	0.86	253	293	\$26.00
Sales and Related Occupations	0.82	825	1,001	\$13.76
Personal Care and Service Occupations	0.77	277	359	\$10.64
Legal Occupations	0.69	29	42	\$26.92
Building and Grounds Cleaning and Maintenance Occupations	0.49	148	304	\$11.72
Transportation and Material Moving Occupations	0.31	241	768	\$18.79
Construction and Extraction Occupations	0.23	238	1,015	\$20.52
Life, Physical, and Social Science Occupations	0.23	33	143	\$26.94
Computer and Mathematical Occupations	0.17	21	122	\$25.03
Community and Social Service Occupations	0.17	28	162	\$19.98
Production Occupations	0.16	83	525	\$25.16
Office and Administrative Support Occupations	0.12	144	1,201	\$15.95
Installation, Maintenance, and Repair Occupations	0.10	81	790	\$25.14
Architecture and Engineering Occupations	0.10	23	228	\$35.09
Healthcare Support Occupations	0.07	29	408	\$13.37
Healthcare Practitioners and Technical Occupations	0.07	41	635	\$29.06
Food Preparation and Serving Related Occupations	0.04	34	766	\$10.13
Education, Training, and Library Occupations	0.04	42	997	\$19.81
Protective Service Occupations	0.00	1	226	\$20.41
Military-only occupations	0.00	0	54	\$18.15

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Within a small handful of occupational categories, workers are more likely to be self-employed than wage & salaried workers, namely, Arts, Design, Entertainment, Sports, and Media Occupations; Management Occupations; and Farming, Fishing, and Forestry Occupations. Given this group, Management Occupations, are by far the largest in number. The Management Occupations category includes Farmers, Ranchers, and Other Agricultural Managers, which comprises nearly half of all self-employment of workers in the Management Occupations category. Considering the list in its totality, therefore, it can be concluded that property owners and agricultural workers are the single largest group of risk-taking, self-employed individuals in the two counties. Outside of this group, a few other large categories have a fairly high proportion of self-employed workers. Business and Financial Operations Occupations, Sales and Related Occupations, and Personal Care and Service Occupations round out the list of categories with greater than 300 workers, and 50% or greater of self-employed workers.

Resident and Non-Resident Workforce

In addition to looking at commuting data by total population, it is also helpful to examine commuter statistics by occupational classification. In the region, there are no net in-commuters for any occupation though some occupations have fewer out commuters than others, including Arts, Design, Entertainment, Sports, and Media Occupations (4 out commuters), Farming, Fishing, and Forestry Occupations (5 out commuters), Legal Occupations (7 out commuters), and Computer and Mathematical Occupations (7 out commuters).

Occupations with the most out commuters include Office and Administrative Support Occupations (242 out commuters), Transportation and Material Moving Occupations (299 out commuters), and Construction and Extraction Occupations (340 out commuters).

Table 40. In- and Out-Migration by Occupational Group

Occupation Group	Commuters
Arts, Design, Entertainment, Sports, and Media Occupations	4 out commuters
Farming, Fishing, and Forestry Occupations	5 out commuters
Legal Occupations	7 out commuters
Computer and Mathematical Occupations	7 out commuters
Community and Social Service Occupations	7 out commuters
Healthcare Support Occupations	13 out commuters
Personal Care and Service Occupations	12 out commuters
Protective Service Occupations	22 out commuters
Healthcare Practitioners and Technical Occupations	25 out commuters
Life, Physical, and Social Science Occupations	29 out commuters
Architecture and Engineering Occupations	35 out commuters
Business and Financial Operations Occupations	41 out commuters
Military-only occupations	56 out commuters
Building and Grounds Cleaning and Maintenance Occupations	61 out commuters
Education, Training, and Library Occupations	71 out commuters
Management Occupations	78 out commuters
Production Occupations	126 out commuters
Sales and Related Occupations	136 out commuters
Installation, Maintenance, and Repair Occupations	144 out commuters

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Occupation Group	Commuters
Food Preparation and Serving Related Occupations	166 out commuters
Office and Administrative Support Occupations	242 out commuters
Transportation and Material Moving Occupations	299 out commuters
Construction and Extraction Occupations	340 out commuters

Broad Occupation Mix

Table 41. 2-digit SOC Employment

Occupation	2017 Employment	% of Total Employment	Median Hourly Earning	2017 Location Quotient
Office and Administrative Support Occupations	1,232	10.91%	\$15.81	0.74
Construction and Extraction Occupations	1,101	9.75%	\$21.66	2.15
Sales and Related Occupations	1,058	9.36%	\$11.79	0.93
Education, Training, and Library Occupations	1,006	8.91%	\$20.32	1.57
Transportation and Material Moving Occupations	825	7.30%	\$18.80	1.09
Installation, Maintenance, and Repair Occupations	817	7.23%	\$26.38	1.85
Food Preparation and Serving Related Occupations	773	6.85%	\$10.23	0.82
Healthcare Practitioners and Technical Occupations	651	5.77%	\$29.23	1.04
Production Occupations	549	4.86%	\$26.70	0.83
Management Occupations	546	4.83%	\$38.18	0.87
Personal Care and Service Occupations	444	3.93%	\$11.92	0.92
Healthcare Support Occupations	417	3.69%	\$13.56	1.36
Building and Grounds Cleaning and Maintenance Occupations	368	3.25%	\$12.53	0.88
Business and Financial Operations Occupations	314	2.78%	\$27.45	0.54
Architecture and Engineering Occupations	231	2.05%	\$36.48	1.22
Protective Service Occupations	228	2.02%	\$20.40	0.89
Community and Social Service Occupations	169	1.50%	\$20.80	0.91
Life, Physical, and Social Science Occupations	147	1.30%	\$25.35	1.62
Computer and Mathematical Occupations	124	1.09%	\$26.69	0.38
Arts, Design, Entertainment, Sports, and Media Occupations	117	1.04%	\$17.09	0.57
Farming, Fishing, and Forestry Occupations	77	0.68%	\$12.82	0.89
Military-only occupations	54	0.48%	\$18.15	0.91
Legal Occupations	47	0.42%	\$26.46	0.50

Top Occupations by Employment

The following table displays the top occupational groups by total employment for the slightly more specific 4-digit SOC Codes. Median hourly earnings for these occupations range from \$8.99 at the low end for Fast Food Counter Workers to \$47.54 at the high end for General and Operations Managers. The greatest degree of growth is among Personal Care Aides, which increased 31% between 2012 and 2017; however, this category is projected to decrease 6% over the next five years. Teacher Assistants are projected to experience the most growth over the next five years.

In Uinta and South Lincoln Counties, six of the twenty top occupation groups have seen job growth in the last five years. Personal Care Aids experienced the most growth of these six occupations by adding 38 jobs, a 31% increase. None of these occupations are expected to see significant growth in the next five years. However, Elementary and Middle School Teachers are one of the most intriguing occupations listed because they have the highest number of projected openings and fairly high earnings compared to the other occupations listed.

Table 42. 4-digit SOC Employment

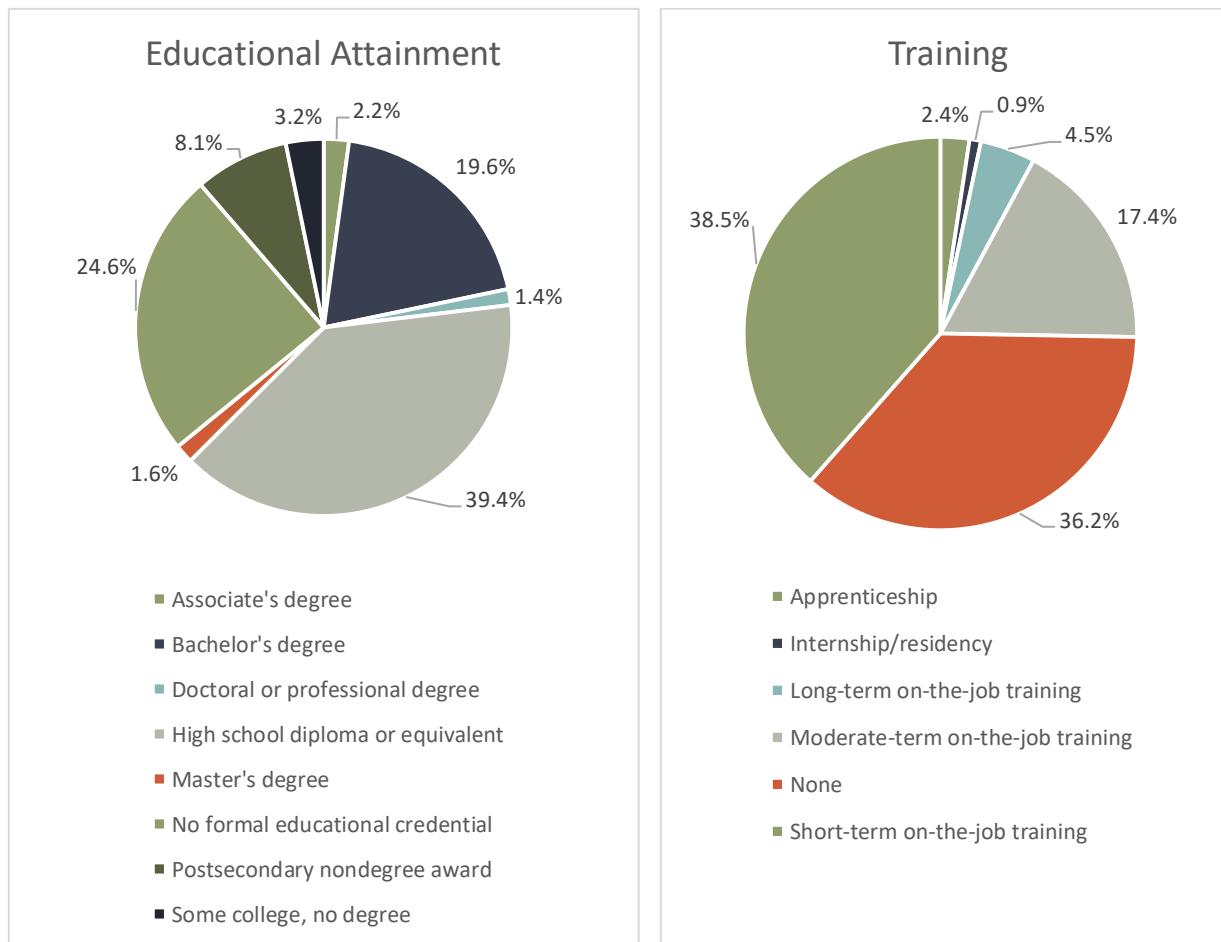
Occupation	2017 Employment	Change 2012-2017	Projected Change 2017-2022	Median Hourly Earnings
Cashiers	264	(3)	(1%)	(23)
Driver/Sales Workers and Truck Drivers	249	(24)	(7%)	(25)
Nursing, Psychiatric, and Home Health Aides	230	(83)	(22%)	(34)
Building Cleaning Workers	229	(31)	(10%)	6
Elementary and Middle School Teachers	225	1	0%	14
Retail Salespersons	211	(3)	(1%)	7
Registered Nurses	204	4	2%	(5)
Secretaries and Administrative Assistants	186	(26)	(10%)	(5)
Office Clerks, General	176	(14)	(6%)	(12)
Fast Food and Counter Workers	173	12	6%	2
Cooks	170	9	5%	(1)
Teacher Assistants	159	24	15%	6%
Construction Laborers	151	(87)	(33%)	(44)
Miscellaneous Teachers and Instructors	140	(9)	(5%)	7
General and Operations Managers	132	(6)	(3%)	(3)
Personal Care Aides	125	38	31%	(10)
First-Line Supervisors of Sales Workers	264	(25)	(14%)	0
Maintenance and Repair Workers, General	249	(1)	(1%)	1
Laborers and Material Movers, Hand	230	(13)	(9%)	5
Stock Clerks and Order Fillers	229	(3)	(2%)	(5)
				\$13.00

Education & Training Requirements for High Demand Jobs

Of all occupations, 39% require a high school diploma or equivalent. Among high demand jobs in the region, about half (50%) typically require a high school diploma or less.⁵⁴ Approximately 34.4% of these high demand jobs typically require at least an Associate's degree. In terms of training and experience requirements, approximately 64% require some type of training, which is typically on-the-job training.

Average hourly earnings range from \$10.81/hr. for Waiters and Waitresses to \$31.97/hr. for Mangers, All Other. Elementary School Teachers are expected to add the second highest number of jobs through 2020 and have the fourth highest hourly wage (\$26.47/hr.). Other growing occupations that pay high wages include: Secondary School Teachers (\$26.80/hr.); Elementary School Teachers, Except Special Education (26.47/hr.), Rail Car Repairers (\$19.05/hr.); Postal Service Mail Carriers (\$18.64/hr.); and Laborers and Freight, Stock, and Material Movers, Hand (\$18.38/hr.). Of these occupations, three require a high school diploma or less.

Figure 20. Educational Attainment & Training Requirements for High Demand Jobs



⁵⁴ A total of 20 occupations with the highest projected job growth from 2017 to 2022 are included in this calculation. These occupations are defined at the 5-digit SOC code level.

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Table 43. High-Demand Jobs with Educational Level Requirements

Description	2022 Jobs	Change 2017 - 2022	Annual Openings	Avg. Hourly Earnings	Typical Entry Level Education	Typical On-The-Job Training
Teacher Assistants	197	11	22	\$13.37	Some college, no degree	None
Elementary School Teachers, Except Special Education	201	10	16	\$26.47	Bachelor's degree	None
Dental Assistants	57	8	7	\$14.87	Postsecondary nondegree award	None
Secondary School Teachers, Except Special and Career/Technical Education	119	7	9	\$26.80	Bachelor's degree	None
Preschool Teachers, Except Special Education	59	7	7	\$16.41	Associate's degree	None
Retail Salespersons	256	7	38	\$13.40	No formal educational credential	Short-term on-the-job training
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	194	6	26	\$13.44	No formal educational credential	Short-term on-the-job training
Postal Service Mail Carriers	27	5	3	\$18.64	High school diploma or equivalent	Short-term on-the-job training
Cooks, Restaurant	87	5	13	\$14.79	No formal educational credential	Moderate-term on-the-job training
Medical Assistants	44	5	5	\$14.99	Postsecondary nondegree award	None
Rail Car Repairers	38	5	4	\$19.05	High school diploma or equivalent	Long-term on-the-job training
Waiters and Waitresses	122	5	23	\$10.81	No formal educational credential	Short-term on-the-job training
Medical Secretaries	71	5	8	\$15.36	High school diploma or equivalent	Moderate-term on-the-job training
Substitute Teachers	170	5	19	\$13.07	Bachelor's degree	None
Laborers and Freight, Stock, and Material Movers, Hand	84	4	12	\$18.38	No formal educational credential	Short-term on-the-job training
Middle School Teachers, Except Special and Career/Technical Education	75	4	6	\$27.12	Bachelor's degree	None
Nonfarm Animal Caretakers	23	4	4	\$11.55	High school diploma or equivalent	Short-term on-the-job training

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Description	2022 Jobs	Change 2017 - 2022	Annual Openings	Avg. Hourly Earnings	Typical Entry Level Education	Typical On-The-Job Training
Light Truck or Delivery Services Drivers	51	4	6	\$15.12	High school diploma or equivalent	Short-term on-the-job training
Receptionists and Information Clerks	40	3	6	\$13.15	High school diploma or equivalent	Short-term on-the-job training
Managers, All Other	54	3	4	\$31.97	Bachelor's degree	None

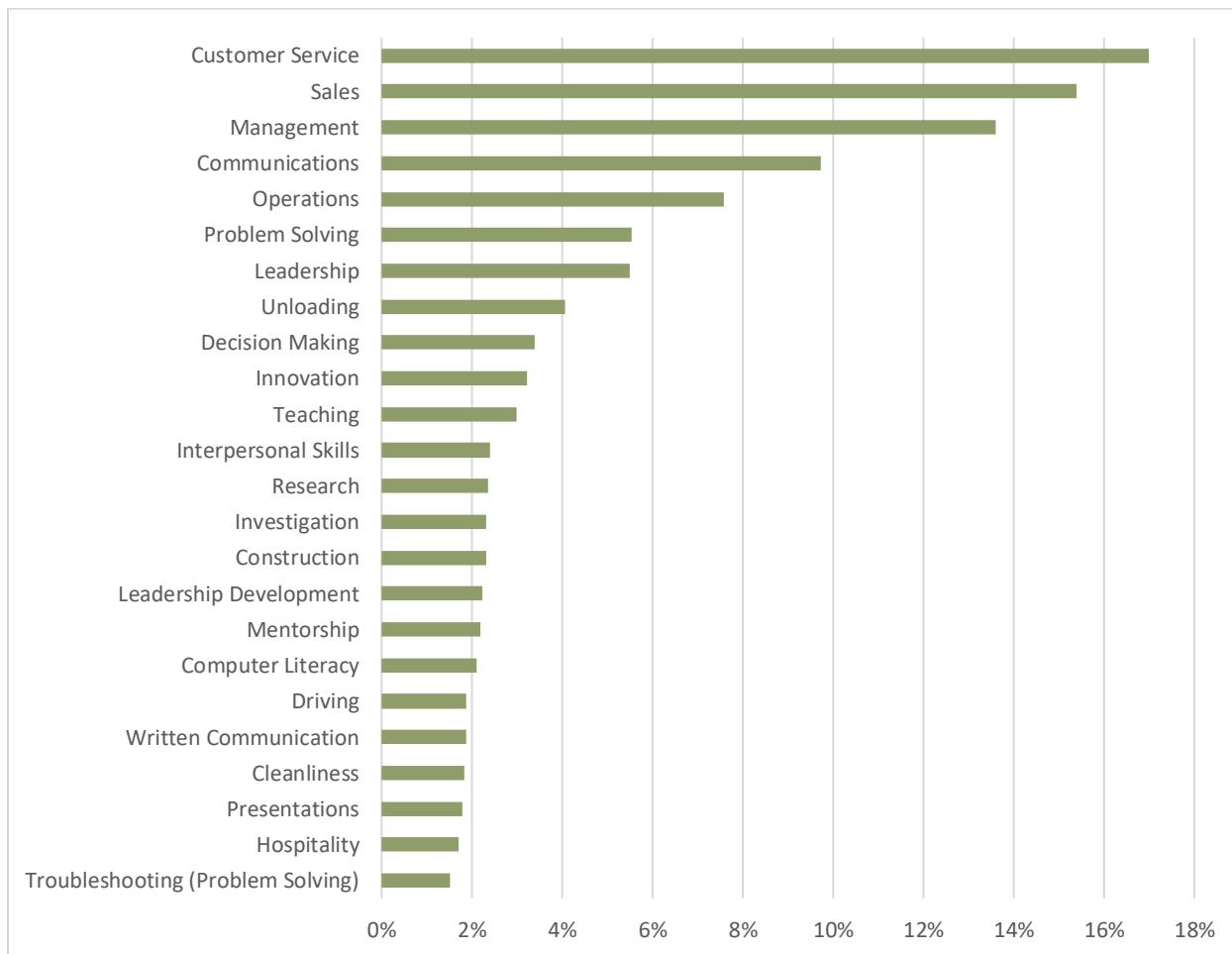
Most In-Demand Skills & Qualifications

The following charts illustrate the most demanded common (soft) skills and technical (hard) skills in Uinta and Lincoln Counties. These statistics are based on regional job postings and the skill requirements included in each listing. The top five most in-demand common skills include:

- Customer Service
- Operations
- Communications
- Management
- Sales

Many of the top common skills require that applicants possess the ability to interact both externally (with customers) or internally (among co-workers). These skills require that applicants have the ability to build relationships, listen, and adapt their communication to a situation at hand.

Figure 21. Top Common (Soft) Skills Requested in Job Postings

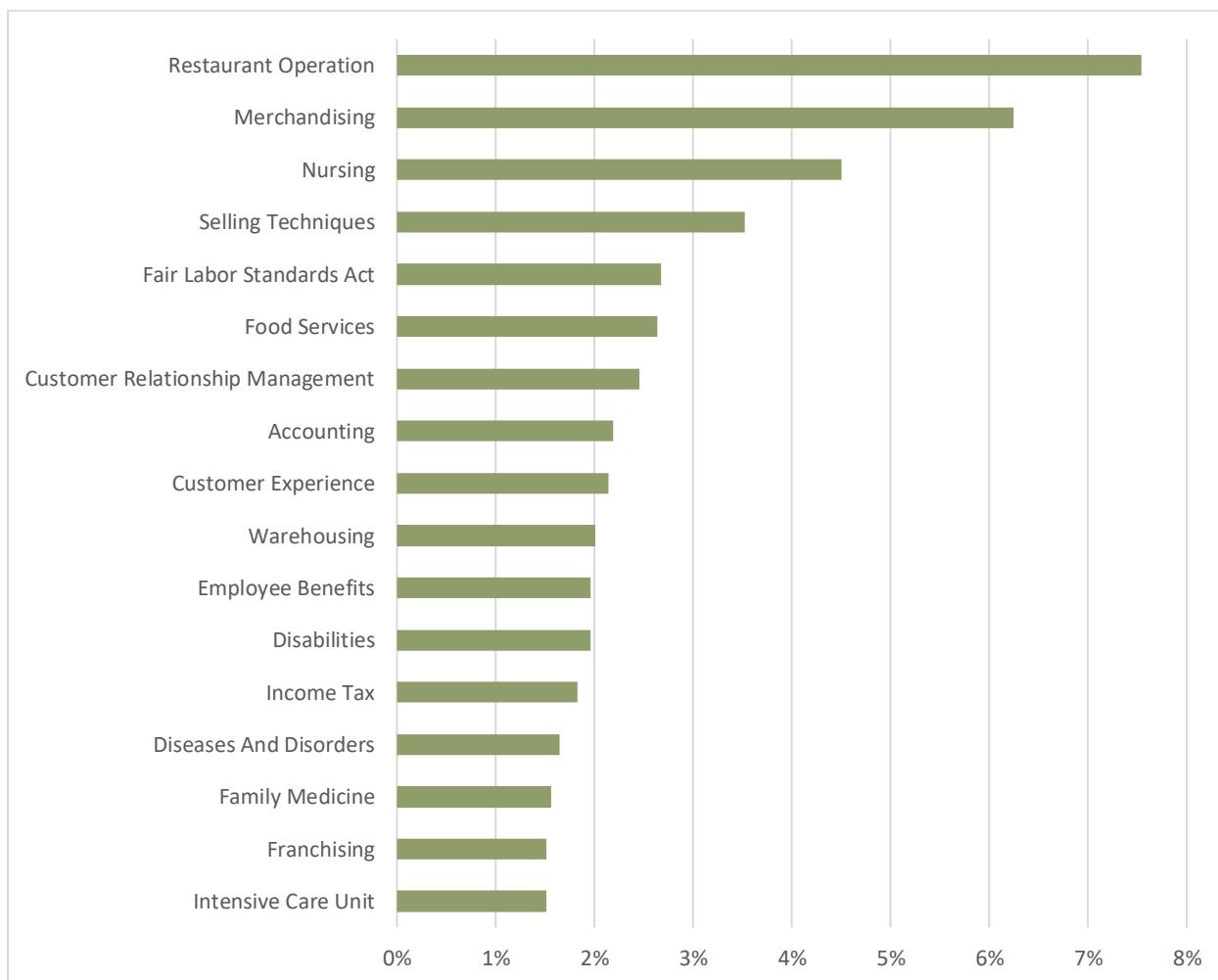


The top five most in demand technical skills include:

- Restaurant Operations
- Merchandising
- Nursing
- Selling Techniques
- Fair Labor Standards Act

Many of the top hard skills require that applicants understand the daily operations that occur within the Food Service and Healthcare industries. The hard skills require applicants to possess many of the common skills previously listed. Hard skills such as Restaurant Operation, Selling Techniques, and Merchandising require common skills with a high level of communicative ability.

Figure 22. Top Technical (Hard) Skills Requested in Job Postings



Industry Based Workforce

The following section provides an in-depth look at industry sectors that are important to the economy in Uinta and South Lincoln Counties. These industry sectors include: Health Care, Manufacturing, Energy, Tourism, and Agriculture. For each of these sectors the top employing sub-sectors are listed by 4-digit NAICS code, as well as the staffing patterns for each sector. Staffing patterns data show the top employing occupations at the 4-digit SOC level, along with past and projected growth, competitive effect, location quotient, and average earnings.

Employment for Top Health Care Industries

The largest employing Health Care sectors include Individual and Family Services (248), General Medical and Surgical Hospitals (156), Child Day Care Services (152) and Offices of Dentists (123). Of these, Child Day Care Services and Offices of Dentists have above average LQs (1.74 and 1.79, respectively). Two notable industries are Other Residential Care Facilities and Vocational Rehabilitation Services as the have the highest LQs (6.08 and 2.88, respectively) and have seen significant job growth compared to other top industries over the past 5 years.

The individual industries within the Health Care & Social Assistance sector are a mix of high-paying and low-paying. The highest paying sector is Offices of Physicians (\$84,271), while the sector with the lowest average wages is Other Residential Care Facilities (\$20,520).

Table 44. Employment in Health Care Industries

Industry	2017 Jobs	'12-'17 Change	CE '12-'17	'17-'22 Change	CE '17-'22	'17 LQ	Average Earnings
Individual and Family Services	248	2	(125)	4	(57)	1.40	\$34,052
General Medical and Surgical Hospitals	156	(26)	(37)	(23)	(31)	0.48	\$68,418
Child Day Care Services	152	(6)	4	7	2	1.74	\$28,177
Offices of Dentists	123	18	8	21	8	1.79	\$35,329
Offices of Physicians	111	27	22	23	9	0.60	\$84,271
Residential Intellectual and Developmental Disability, Mental Health, and Substance Abuse Facilities	84	(86)	(101)	(40)	(49)	1.88	\$25,823
Other Residential Care Facilities	71	24	22	2	4	6.08	\$20,520
Vocational Rehabilitation Services	71	39	42	19	21	2.88	\$28,848
Nursing Care Facilities (Skilled Nursing Facilities)	61	(4)	(3)	(31)	(31)	0.53	\$31,506
Offices of Other Health Practitioners	59	4	(8)	3	(7)	0.82	\$34,005
Home Health Care Services	45	13	8	19	6	0.44	\$42,408
Outpatient Care Centers	41	(6)	(23)	12	2	0.63	\$41,199
Continuing Care Retirement Communities and Assisted Living Facilities for the Elderly	30	(11)	(18)	5	(1)	0.46	\$21,817

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Industry	2017 Jobs	'12-'17 Change	CE '12-'17	'17-'22 Change	CE '17-'22	'17 LQ	Average Earnings
Community Food and Housing, and Emergency and Other Relief Services	11	Insf. Data	8	4	3	0.86	\$35,651
Medical and Diagnostic Laboratories	<10	Insf. Data	2	Insf. Data	1	0.10	Insf. Data
Other Ambulatory Health Care Services	<10	Insf. Data	7	Insf. Data	2	0.30	Insf. Data
Psychiatric and Substance Abuse Hospitals	0	0	0	0	0	0.00	\$0
Specialty (except Psychiatric and Substance Abuse) Hospitals	0	0	0	0	0	0.00	\$0

Staffing Patterns for Health Care

The top four highest employment 4-digit SOC categories for this industry sector include Personal Care Aides (154), Nursing Assistants (121 jobs), Home Health Aides (95), and Childcare Workers (74). Three of the four occupations experienced declines over the past five years; however, Personal Care Aides grew by 47 jobs. However, it is also expected to lose ten jobs over the next five years through 2022. Wages for Personal Care Aides are among the lowest median wages in this industry sector at \$12.45/hr. The only occupation with lower wages is Childcare Workers at \$10.75/hr. On the opposite end of the earnings scale, Family and General Practitioners is the highest paid occupation (\$89.57/hr.).

Table 45. Staffing within Health Care Industries

Occupation	2017 Employment	Change 2012-2017		Projected Change 2017-2022		Median Hourly Earnings
		2012-2017	2017-2022	2017-2022	2017-2022	
Personal Care Aides	154	47	44%	(10)	(6%)	\$12.45
Nursing Assistants	121	(10)	(8%)	(31)	(26%)	\$12.92
Home Health Aides	95	(68)	(42%)	(1)	(1%)	\$14.45
Childcare Workers	74	(25)	(25%)	(4)	(5%)	\$10.75
Registered Nurses	72	(2)	(3%)	(2)	(3%)	\$29.17
Dental Assistants	48	7	17%	8	17%	\$14.89
Medical Secretaries	44	5	13%	5	11%	\$14.76
Preschool Teachers, Except Special Education	43	10	30%	6	14%	\$15.93
Office Clerks, General	32	3	10%	1	3%	\$16.37
Medical Assistants	30	6	25%	5	17%	\$14.50
Receptionists and Information Clerks	19	1	6%	3	16%	\$12.95
Child, Family, and School Social Workers	19	3	19%	3	16%	\$18.40
Teacher Assistants	18	3	20%	3	17%	\$13.09
Social and Human Service Assistants	18	(4)	(18%)	3	17%	\$15.69
Substance Abuse, Behavioral Disorder, and Mental Health Counselors	17	(5)	(23%)	2	12%	\$25.63
Dentists, General	16	4	33%	3	19%	\$54.17
Family and General Practitioners	16	5	45%	2	13%	\$89.57

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Occupation	2017 Employment	Change 2012-2017		Projected Change 2017-2022		Median Hourly Earnings
Dental Hygienists	15	1	7%	4	27%	\$33.67
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	15	1	7%	0	0%	\$15.97
Social and Community Service Managers	13	2	18%	1	8%	\$25.84

Employment for Top Manufacturing Industries

The top Manufacturing industries by employment include Soap, Cleaning Compound, and Toilet Preparation Manufacturing (70 jobs); Other Electrical Equipment and Component Manufacturing (63); Sawmills and Wood Preservation (57); and Other General Purpose Machinery Manufacturing (28). These four also have relatively high LQs, with the highest LQ being Soap, Cleaning Compound, and Toilet Preparation Manufacturing (9.15).

Over the past five years, Soap, Cleaning Compound, and Toilet Preparation Manufacturing added the most employees (30 jobs). Growth in this industry may be in part due unique strengths within the region, as demonstrated by the larger competitive effect compared to those of other industries listed below. Soap, Cleaning Compound, and Toilet Preparation Manufacturing industry is projected to grow over the next five years as well. Other sectors projected to grow include Sawmills and Wood Preservation and Basic Chemical Manufacturing. The manufacturing sector paying the highest average earnings is Basic Chemical Manufacturing (\$104,184). The sector with the lowest average wages is Sawmills and Wood Preservation (\$42,162).

Table 46. Detailed Employment in Manufacturing Industries

Industry	2017 Jobs	'12-'17 Change	CE '12-'17	'17-'22 Change	CE '17-'22	'17 LQ	Average Earnings
Soap, Cleaning Compound, and Toilet Preparation Manufacturing	70	30	28	18	18	9.15	\$59,722
Other Electrical Equipment and Component Manufacturing	63	(42)	(50)	(7)	(9)	6.57	\$65,601
Sawmills and Wood Preservation	57	0	(5)	3	3	8.40	\$42,162
Other General Purpose Machinery Manufacturing	28	Insf. Data	18	(5)	(5)	1.53	\$96,826
Basic Chemical Manufacturing	15	Insf. Data	13	8	8	1.42	\$104,184
Petroleum and Coal Products Manufacturing	<10	Insf. Data	(22)	Insf. Data	(5)	0.97	Insf. Data
Printing and Related Support Activities	<10	Insf. Data	(3)	Insf. Data	0	0.03	Insf. Data
Cut and Sew Apparel Manufacturing	<10	Insf. Data	8	Insf. Data	5	0.99	Insf. Data
Other Textile Product Mills	<10	Insf. Data	1	Insf. Data	1	0.48	Insf. Data

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Industry	2017 Jobs	'12-'17 Change	CE '12- '17	'17-'22 Change	CE '17- '22	'17 LQ	Average Earnings
Coating, Engraving, Heat Treating, and Allied Activities	<10	Insf. Data	3	Insf. Data	2	0.77	Insf. Data
Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing	<10	Insf. Data	(6)	Insf. Data	(4)	0.38	Insf. Data
Other Fabricated Metal Product Manufacturing	<10	Insf. Data	5	Insf. Data	3	0.30	Insf. Data
Cement and Concrete Product Manufacturing	<10	Insf. Data	(23)	Insf. Data	0	0.03	Insf. Data
Engine, Turbine, and Power Transmission Equipment Manufacturing	<10	Insf. Data	(3)	Insf. Data	0	0.19	Insf. Data
Architectural and Structural Metals Manufacturing	<10	Insf. Data	(24)	Insf. Data	(2)	0.08	Insf. Data
Other Wood Product Manufacturing	<10	Insf. Data	0	Insf. Data	0	0.02	Insf. Data
Animal Slaughtering and Processing	<10	Insf. Data	(0)	Insf. Data	0	0.02	Insf. Data
Fabric Mills	<10	Insf. Data	2	Insf. Data	1	0.46	Insf. Data
Other Miscellaneous Manufacturing	<10	Insf. Data	(1)	Insf. Data	0	0.04	Insf. Data
Textile Furnishings Mills	<10	Insf. Data	2	Insf. Data	1	0.41	Insf. Data

Staffing Patterns for Manufacturing

The occupational categories that employ the most individuals in the manufacturing sector include Woodworking Machine Setters, Operators, and Tenders (21 jobs) and First-Line Supervisors of Production and Operating Workers (19 jobs). Woodworking Machine Setters, Operators, and Tenders and Sewing Machine Operators contributed to the largest number of new jobs added within the manufacturing sector over the past five years as both added four jobs. Growth projections through 2022 are most significant with Sewing Machine Operators (3 jobs), Industrial Machinery Installation, Repair, and Maintenance Workers (2 jobs), and Crushing, Grinding, Polishing, Mixing, and Blending Workers (2 jobs). Among the top 20 highest employing occupations, Industrial Engineers, Including Health and Safety offers the highest wages (\$48.84/hr.), while Tailors, Dressmakers, and Sewers offers the lowest (\$10.05/hr.).

Table 47. Staffing within Manufacturing Industries

Occupation	2017 Employment	Change 2012-2017		Projected Change 2017-2022		Median Hourly Earnings
		2012-2017	2017-2022	2017-2022	2017-2022	
Woodworking Machine Setters, Operators, and Tenders	21	4	24%	1	5%	\$19.98
First-Line Supervisors of Production and Operating Workers	19	0	0%	1	5%	\$44.96
Industrial Machinery Installation, Repair, and Maintenance Workers	16	2	14%	2	13%	\$35.45
Welding, Soldering, and Brazing Workers	12	(2)	(14%)	(2)	(17%)	\$24.47

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Occupation	2017 Employment	Change 2012-2017		Projected Change 2017-2022		Median Hourly Earnings
Miscellaneous Plant and System Operators	11	(5)	(31%)	(1)	(9%)	\$33.95
Crushing, Grinding, Polishing, Mixing, and Blending Workers	11	3	38%	2	18%	\$23.19
Industrial Truck and Tractor Operators	10	0	0%	1	10%	\$16.76
Drafters	<10	0	0%	0	0%	\$21.40
Engineering Technicians, Except Drafters	<10	0	0%	0	0%	\$26.18
Miscellaneous Engineers	<10	0	0%	0	0%	\$37.59
Sewing Machine Operators	<10	4	400%	3	60%	\$11.85
Shipping, Receiving, and Traffic Clerks	<10	0	0%	0	0%	\$15.18
Stock Clerks and Order Fillers	<10	0	0%	1	100%	\$13.00
Textile Machine Setters, Operators, and Tenders	<10	1	Insf. Data	0	0%	\$21.26
Production, Planning, and Expediting Clerks	<10	0	0%	0	0%	\$27.04
Miscellaneous Textile, Apparel, and Furnishings Workers	<10	0	0%	1	Insf. Data	\$12.62
Tailors, Dressmakers, and Sewers	<10	2	Insf. Data	1	50%	\$10.05
Conservation Scientists and Foresters	<10	0	0%	0	0%	\$29.96
Industrial Engineers, Including Health and Safety	<10	(1)	(20%)	0	0%	\$48.84
Furnace, Kiln, Oven, Drier, and Kettle Operators and Tenders	<10	(1)	(50%)	0	0%	\$26.60

Employment for Top Agriculture Industries

The vast majority of employment in this sector is found in the Animal Production industry, followed by Support Activities for Crop Production. Support Activities for Crop Production added the most new jobs over the past five years and is projected to continue growing slightly through 2022. Several other industries are also projected to grow marginally, including Crop Production and Support Activities for Animal Production. The industry paying the highest average wages is Support Activities for Animal Production (\$29,045), while the industry paying the least is Support Activities for Crop Production (\$18,131).

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Table 48. Detailed Employment in Agriculture Industries

Industry	2017 Jobs	'12-'17 Change	CE '12- 17	'17-'22 Change	CE '17- 22	'17 LQ	Average Earnings
Animal Production	67	(10)	(11)	(6)	(4)	2.20	\$24,056
Support Activities for Crop Production	35	4	0	2	(1)	1.01	\$18,131
Support Activities for Animal Production	11	Insf. Data	7	2	2	3.68	\$29,045
Support Activities for Forestry	<10	Insf. Data	0	Insf. Data	0	0.82	Insf. Data
Logging	<10	Insf. Data	(8)	Insf. Data	(0)	0.65	Insf. Data
Crop Production	<10	Insf. Data	4	Insf. Data	2	0.12	Insf. Data
Timber Tract Operations	0	0	0	0	0	0.00	\$0
Forest Nurseries and Gathering of Forest Products	0	0	0	0	0	0.00	\$0
Fishing	0	0	0	0	0	0.00	\$0
Hunting and Trapping	0	0	0	0	0	0.00	\$0

Staffing Patterns for Agriculture

The largest single occupation within the Agriculture industry is Farmworkers and Laborers, Crop, Nursery, and Greenhouse. This occupation also grew the most jobs over the past five years and is projected to add the most new jobs over the next five years (2 jobs). The occupation that pays the highest median wages is Packaging and Filling Machine Operators and Tenders (\$41.65/hr.), while the occupation paying the least is Farmworkers, Farm, Ranch, and Aquacultural Animals (\$8.84/hr.).

Table 49. Employment within Agriculture Industries

Occupation	2017 Employment	Change 2012-2017	Projected Change 2017-2022		Median Hourly Earnings
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	43	7	19%	2	\$13.50
Farmers, Ranchers, and Other Agricultural Managers	39	(9)	(19%)	(5)	\$9.14
Accountants and Auditors	<10	0	0%	0	\$25.88
Bookkeeping, Accounting, and Auditing Clerks	<10	0	0%	0	\$17.30
Packaging and Filling Machine Operators and Tenders	<10	0	0%	0	\$41.65
Light Truck or Delivery Services Drivers	<10	0	0%	0	\$14.29
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	<10	0	0%	0	\$13.17
Managers, All Other	<10	0	0%	0	\$25.43
Office Clerks, General	<10	0	0%	0	\$16.37
Heavy and Tractor-Trailer Truck Drivers	<10	0	0%	0	\$19.65
First-Line Supervisors of Farming, Fishing, and Forestry Workers	<10	(1)	(33%)	0	\$25.58
Logging Equipment Operators	<10	(5)	(71%)	0	\$17.95
Agricultural and Food Science Technicians	<10	0	0%	0	\$15.63
Maintenance and Repair Workers, General	<10	1	Insf. Data	0	\$19.25
Agricultural Workers, All Other	<10	0	0%	0	\$9.13
Farmworkers, Farm, Ranch, and Aquacultural Animals	<10	4	133%	1	\$8.84
Graders and Sorters, Agricultural Products	<10	0	0%	0	\$10.20
Agricultural Equipment Operators	<10	1	33%	0	\$12.55
Landscaping and Groundskeeping Workers	<10	0	0%	1	Insf. Data
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	<10	0	0%	0	\$15.97

Employment for Top Tourism Industries⁵⁵

The vast majority of employment within the regional Tourism Industry is found within Restaurants and Other Eating Places (588) and Traveler Accommodation (251). Over the past five years, Restaurants and Other Eating Places added 52 jobs but is only projected to add one more job through 2022. The sector with the highest average earnings is RV (Recreational Vehicle) Parks and Recreational Camps (\$32,447), while the sector with the lowest is Other Amusement and Recreation Industries (\$10,931).

Table 50. Detailed Employment in Tourism Industries

Industry	2017 Jobs	'12-'17 Change	CE '12-'17	'17-'22 Change	CE '17-'22	'17 LQ	Average Earnings
Restaurants and Other Eating Places	588	52	(38)	1	(48)	0.79	\$16,157
Traveler Accommodation	251	0	(23)	(12)	(21)	1.87	\$19,583
Gambling Industries	58	38	40	12	9	6.36	\$27,224
Drinking Places (Alcoholic Beverages)	42	(6)	(11)	0	1	1.49	\$12,709
Other Amusement and Recreation Industries	34	3	(2)	4	1	0.35	\$10,931
Spectator Sports	32	Insf. Data	24	1	0	2.36	\$13,421
RV (Recreational Vehicle) Parks and Recreational Camps	19	6	4	5	2	3.99	\$32,447
Special Food Services	16	Insf. Data	12	4	2	0.29	\$19,901
Independent Artists, Writers, and Performers	12	2	1	2	2	0.56	\$20,308
Promoters of Performing Arts, Sports, and Similar Events	<10	Insf. Data	0	Insf. Data	0	0.14	Insf. Data
Museums, Historical Sites, and Similar Institutions	<10	Insf. Data	2	Insf. Data	1	0.17	Insf. Data
Amusement Parks and Arcades	0	0	0	0	0	0.00	\$0
Performing Arts Companies	0	Insf. Data	(8)	0	0	0.00	\$0
Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures	0	0	0	0	0	0.00	\$0

Staffing Patterns for Tourism

The majority of employment within this industry sector is found within four occupations that are within the food service industry: Fast Food and Counter Workers (161), Cooks (143), Waiters and Waitresses (115), and Building Cleaning Workers (74). Cooks and Waiters and Waitresses added the most jobs over

⁵⁵ The Tourism industry crosses over several industries, including NAICS 48 (Transportation and Warehousing); 56 (Administrative and Support Services); 71 (Arts, Entertainment, and Recreation; and 72 (Accommodation and Food Services).

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the past five years (14 and 12, respectively) but are projected to experience minimal job growth through 2022.

Within this industry sector, General and Operations Managers is the occupation paying the highest median earnings at \$47.54/hr. The occupation with the lowest median earnings is Waiters and Waitresses at \$8.29/hr.

Table 51. Staffing within Tourism Industries

Occupation	2017 Employment	Change 2012-2017	Projected Change 2017-2022	Median Hourly Earnings
Fast Food and Counter Workers	161	7	5%	1
Cooks	143	14	11%	0
Waiters and Waitresses	115	12	12%	3%
Building Cleaning Workers	74	0	0%	(2%)
Supervisors of Food Preparation and Serving Workers	66	8	14%	2%
Bartenders	49	3	7%	4%
Driver/Sales Workers and Truck Drivers	38	9	31%	(11%)
Cashiers	34	11	48%	3%
Maintenance and Repair Workers, General	30	6	25%	0%
Food Preparation Workers	27	1	4%	4%
Dishwashers	24	1	4%	0%
Hotel, Motel, and Resort Desk Clerks	22	(1)	(4%)	(5%)
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	22	5	29%	5%
General and Operations Managers	17	4	31%	0%
Dining Room and Cafeteria Attendants and Bartender Helpers	15	2	15%	7%
Food Service Managers	14	4	40%	7%
Grounds Maintenance Workers	11	2	22%	9%
Miscellaneous Food Preparation and Serving Related Workers	<10	0	0%	0%
First-Line Supervisors of Building and Grounds Cleaning and Maintenance Workers	<10	1	17%	(14%)
Athletes, Coaches, Umpires, and Related Workers	<10	5	167%	13%

Employment for Energy Industries

The largest subsector by employment in the Energy industry is Oil and Gas Extraction with 389 jobs. This industry has lost 126 jobs since 2012 but is projected to slightly grow by five jobs through 2022. Coal Mining has done well in the region over the past five years adding ten jobs and is expected to add five more through 2022. This differs from national trends as the coal industry has lost over 34,800 jobs from 2012-2017 nationally.⁵⁶ Support services for mining has a large number of jobs (224 jobs) but has seen significant job losses over the last five years and is expected to lose 95 more jobs to 2022. The three top mining industries in the region all have high LQs suggesting the region is highly specialized in resource extraction industries. Earnings are also high for the top three industries in this group with Oil and Gas Extraction and Coal Mining jobs earning an average of \$149,275 and \$111,945 respectively.

Table 52. Detailed Employment in Energy Industries

Industry	2017 Jobs	'12-'17 Change	CE '12-'17	'17-'22 Change	CE '17-'22	'17 LQ	Average Earnings
Oil and Gas Extraction	389	(126)	(4)	5	(28)	38.06	\$149,275
Coal Mining	280	10	120	5	25	78.13	\$111,945
Support Activities for Mining	224	(209)	(104)	(95)	(116)	10.41	\$76,001
Nonmetallic Mineral Mining and Quarrying	25	(2)	(4)	2	2	3.72	\$49,609
Metal Ore Mining	0	0	0	0	0	0.00	\$0

Staffing Patterns for Energy Industries

Within this sector, the occupations with highest number of jobs include Roustabouts, Oil and Gas (76); Derrick, Rotary Drill, and Service Unit Operators, Oil, Gas, and Mining (66); and Mining Machine Operators (65). Oil and Gas and Derrick, Rotary Drill, and Service Unit Operators, Oil, Gas, and Mining have demonstrated and are projected to see declines in employment. Wages within this sector tend to be high, with all but Roustabouts, Oil and Gas paying greater than \$20.00/hr.

⁵⁶ Data from this section are from Economic Modeling Specialists International (EMSI), 2018.3 Class of Worker.

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Table 53. Staffing Patterns in Energy Industries

Occupation	2017 Employment	Change 2012-2017	Projected Change 2017-2022		Median Hourly Earnings
Roustabouts, Oil and Gas	76	(46)	(38%)	(23)	(30%)
Derrick, Rotary Drill, and Service Unit Operators, Oil, Gas, and Mining	66	(65)	(50%)	(17)	(26%)
Mining Machine Operators	65	(6)	(8%)	0	0%
Industrial Machinery Installation, Repair, and Maintenance Workers	54	4	8%	(6)	(11%)
Miscellaneous Plant and System Operators	52	(5)	(9%)	(2)	(4%)
Pumping Station Operators	41	(18)	(31%)	(1)	(2%)
First-Line Supervisors of Construction Trades and Extraction Workers	38	(9)	(19%)	(3)	(8%)
Petroleum Engineers	31	(32)	(51%)	(2)	(6%)
Driver/Sales Workers and Truck Drivers	31	(4)	(11%)	(5)	(16%)
Heavy Vehicle and Mobile Equipment Service Technicians and Mechanics	25	7	39%	(1)	(4%)
Electricians	24	(3)	(11%)	(1)	(4%)
General and Operations Managers	20	(6)	(23%)	(2)	(10%)
Construction Equipment Operators	16	(4)	(20%)	0	0%
Accountants and Auditors	14	0	0%	1	7%
Mining and Geological Engineers, Including Mining Safety Engineers	14	4	40%	(1)	(7%)
Office Clerks, General	12	(1)	(8%)	(1)	(8%)
Helpers--Extraction Workers	11	(12)	(52%)	(1)	(9%)
Environmental Scientists and Geoscientists	11	(11)	(50%)	0	0%
Miscellaneous Legal Support Workers	11	7	175%	0	0%
Welding, Soldering, and Brazing Workers	11	(3)	(21%)	(2)	(18%)
					\$24.47

Transportation

This section demonstrates the transportation proximity, infrastructure, organizations, and contacts for Uinta and South Lincoln Counties (USLC).

Table 54: Market Proximity – Distance from USLC to Metro Areas

Market	Miles	Hours
Park City, UT	63	1
Salt Lake City, UT	83	1
Denver, CO	438	6.5
Las Vegas, NV	481	7
Seattle, WA	879	13
San Francisco, CA	813	12
Los Angeles, CA	749	11
Phoenix, AZ	721	11
Dallas, TX	1,213	18
Albuquerque, NM	659	11
Portland, OR	805	12
Kansas City, MO	990	14
Billings, MT	469	7.5

Table 55: Interstate and Highway Proximity – Distance from USLC

Interstate/Highway	Miles	Hours
Interstate 80	0	0
Highway 150 S	0	0
Interstate 84	34.5	.5
Interstate 15	76.5	1
Highway 89 N	68	1
Highway 40	72.5	1
Interstate 70	239	4

Table 56: Railroad Proximity – Distance from USLC

Railroad	Miles
Union Pacific Railroad	0
Burlington Northern	100

Table 57: Air Service Proximity – Distance from USLC

Airport	Miles	Hours
Evanston-Uinta County Regional Airport	0	0
Kemmerer Municipal Airport	0	0
Fort Bridger Airport	0	0
Salt Lake City International Airport	86.5	1
Southwest Wyoming Regional Airport	110	1.5

Table 58: Public Transportation – Distance from USLC

Service	Miles	Hours
Greyhound Bus	0	0
Amtrak Train – California Zephyr Line	83	1

Utility Infrastructure

This section demonstrates the utility infrastructure for Uinta and South Lincoln Counties.

Table 59: Evanston Area Utilities

Utility	Provider	Capacity
Electric	Rocky Mountain Power	3-Phase, 150 KVA transformer with 480 volts, 10,000 amps. Dual circuits available. Two (2) substations located nearby. Blue Sky Renewable Energy Program available with nearby wind farm. Able to provide additional energy service as needed.
Gas	Dominion Energy	6-inch line with 40 psi.
Water	City of Evanston	6-inch line with 200,000 gallon per/ mo. capacity. Raw irrigation system available. Rates: \$2.30 per 1,000 gallons + base (\$195.91 for 6-inch)
Sewer	City of Evanston	Rates: \$1.60 per 1,000 gallons + base (\$175.94), storm water \$4.73, discharge permit required
Telecommunication & Fiber	CenturyLink, All West Communications, Syringa, NGL Connection, Silver Star, AT&T. Standard and T3	

Table 60: Kemmerer Area Utilities

Utility	Provider	Capacity
Electric	Rocky Mountain Power	3-Phase, 150 KVA transformer with 480 volts, 10,000 amps. Able to provide additional energy service as needed.
Gas	Dominion Energy	6-inch and 4-inch line with 42 psi.
Water	Kemmerer-Diamondville Water and Wastewater Joint Powers Board	Rates: \$39.83 per 3,500 gallons on a 5/8" line + \$15.00 depreciation fee + \$2.35 per 1,000 additional gallons after the initial 3,500 gallons.
Sewer	Kemmerer-Diamondville Water and Wastewater Joint Powers Board	Rates: \$27.28 for 3,500 gallons or under for the year + \$15.00 depreciation fee. If over 3,500 gallons used, there is an additional \$2.35 per thousand after 3,500 gallons. If the Board can't get a 4-month average per the timing of the initial connection, they'll start with a flat fee of \$42.64 + 15.00 depreciation until the next year. Fees for a commercial property w/ no yard -\$19.89 plus \$2.35 per 1,000 gallons used + \$15.00 depreciation fee.
Telecommunication & Fiber	CenturyLink, All West Communications, and NGL Connection	



8. APPENDICES

Appendix A: Detailed Industry Cluster Information

Table A1. Detailed Industry Cluster Information

Traded Cluster Name	2017 Jobs	'12-'17 Jobs Change	'12-'17 % Jobs Change	Median Earnings	2017 LQ	12-'17 Competitive Effect	Jobs Multiplier	Unmet Demand in Greater Region (\$M)
Local Education and Training	1,381	78	6.0%	\$37,713	2.18	48	1.13	\$350
Local Health Services	1,327	(24)	(1.7%)	\$41,904	1.06	(128)	1.32	\$4,070
Government	1,133	(34)	(2.9%)	\$32,606	1.33	(48)	2.29	\$31,613
Oil and Gas Production and Transportation	693	(378)	(35.3%)	\$97,109	15.51	(190)	1.80	\$2,650
Local Hospitality Establishments	681	64	10.4%	\$12,736	0.73	(33)	1.11	\$965
Local Motor Vehicle Products and Services	619	6	1.0%	\$22,935	1.86	(43)	1.20	\$822
Local Real Estate, Construction, and Development	519	(31)	(5.6%)	\$34,411	0.61	(116)	1.21	\$1,466
Construction Products and Services	478	(419)	(46.7%)	\$65,671	7.30	(546)	1.30	\$753
Local Retailing of Clothing and General Merchandise	406	(25)	(5.8%)	\$22,449	1.19	(102)	1.19	\$690
Hospitality and Tourism	368	65	21.5%	\$16,496	1.58	34	1.19	\$765
Local Personal Services (Non-Medical)	322	(80)	(20.0%)	\$19,056	0.92	(66)	1.14	\$494
Local Community and Civic Organizations	311	14	4.8%	\$25,238	0.80	(171)	1.14	\$625
Transportation and Logistics	301	85	39.5%	\$53,672	2.05	60	1.39	\$372
Coal Mining	280	10	3.8%	\$92,307	70.59	111	2.08	\$48
Local Commercial Services	259	(77)	(23.0%)	\$27,068	0.38	(103)	1.14	\$1,333
Communications Equipment and Services	223	11	5.4%	\$68,590	3.54	23	2.28	\$2,333
Local Logistical Services	221	(50)	(18.4%)	\$37,141	0.98	(74)	1.21	\$557

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Traded Cluster Name	2017 Jobs	'12-'17 Jobs Change	'12-'17 % Jobs Change	Median Earnings	2017 LQ	12-'17 Competitive Effect	Jobs Multiplier	Unmet Demand in Greater Region (\$M)
Local Food and Beverage Processing and Distribution	209	(15)	(6.6%)	\$19,817	0.67	(31)	1.19	\$896
Distribution and Electronic Commerce	182	(105)	(36.7%)	\$50,354	0.43	(123)	1.57	\$3,088
Local Financial Services	180	(11)	(5.8%)	\$44,339	0.80	(21)	1.47	\$443
Business Services	172	(64)	(27.3%)	\$42,570	0.26	(108)	1.24	\$3,761
Local Utilities	147	23	18.5%	\$93,448	3.59	20	2.40	\$533
Downstream Chemical Products	133	(12)	(8.4%)	\$46,747	6.83	(20)	1.43	\$737
Local Household Goods and Services	125	(3)	(2.4%)	\$17,702	0.76	(14)	1.18	\$354
Agricultural Inputs and Services	120	6	5.2%	\$19,882	0.94	1	1.15	\$2,078
Electric Power Generation and Transmission	113	(34)	(23.1%)	\$83,160	8.70	(41)	2.24	\$680
Local Entertainment and Media	89	(2)	(2.0%)	\$18,188	0.79	6	1.19	\$415
Wood Products	57	0	0.6%	\$30,985	2.07	(6)	1.64	\$303
Environmental Services	45	(12)	(21.9%)	\$39,866	5.29	(24)	1.38	\$65
Local Industrial Products and Services	32	(13)	(28.8%)	\$11,466	0.77	(9)	1.21	\$195
Production Technology and Heavy Machinery	27	14	109.2%	\$67,845	0.42	15	1.39	\$1,216
Financial Services	25	3	15.8%	\$0	0.17	2	1.38	\$2,938
Nonmetal Mining	25	(2)	(8.3%)	\$15,544	3.60	(3)	1.30	\$136
Upstream Chemical Products	15	13	949.8%	\$80,842	1.28	13	3.13	\$659
Performing Arts	13	(4)	(24.9%)	\$17,693	0.29	(7)	1.04	\$205
Marketing, Design, and Publishing	12	(6)	(31.9%)	\$0	0.10	(10)	1.24	\$1,299
Apparel	10	9	1248.7%	\$0	0.86	9	1.09	\$138
Education and Knowledge Creation	10	1	17.6%	\$0	0.02	(0)	1.15	\$1,670
Metalworking Technology	9	4	69.7%	\$0	0.28	4	1.21	\$433
Downstream Metal Products	8	(17)	(68.5%)	\$0	0.25	(18)	1.23	\$295
Forestry	4	(8)	(63.7%)	\$0	0.64	(8)	1.53	\$33

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Traded Cluster Name	2017 Jobs	'12-'17 Jobs Change	'12-'17 % Jobs Change	Median Earnings	2017 LQ	12-'17 Competitive Effect	Jobs Multiplier	Unmet Demand in Greater Region (\$M)
Textile Manufacturing	3	3	1558.2%	\$0	0.22	3	1.07	\$224
Insurance Services	3	(4)	(56.4%)	\$0	0.03	(5)	2.59	\$1,878
Video Production and Distribution	2	(1)	(31.0%)	\$0	0.09	(2)	1.56	\$160
Printing Services	1	(3)	(75.3%)	\$0	0.03	(3)	1.13	\$209
Livestock Processing	1	(0)	(19.4%)	\$0	0.02	(0)	1.47	\$596
Leather and Related Products	0	(0)	(46.2%)	\$0	0.17	(0)	1.06	\$17

Table A2. Detailed Industry Sub-cluster Information

Traded Cluster Name	2017 Jobs	'12-'17 Jobs Change	'12-'17 % Jobs Change	Median Earnings	2017 LQ	12-'17 Competitive Effect	Jobs Multiplier	Unmet Demand in Greater Region (\$M)
Elementary and Secondary Schools	1,296	32	2.5%	\$38,782	2.18	(1)	1.13	\$311
Local Government	774	(4)	(0.5%)	\$27,754	1.95	(27)	2.09	\$2,332
Hospitals	676	(8)	(1.2%)	\$50,616	1.59	(53)	1.45	\$1,860
Hospitality Establishments	642	55	9.3%	\$13,215	0.78	(40)	1.12	\$795
Construction	475	(421)	(47.0%)	\$66,053	10.56	(548)	1.30	\$459
Oil and Gas Extraction	389	(125)	(24.4%)	\$117,825	38.00	(11)	1.84	\$2,109
Gasoline Stations	384	(13)	(3.2%)	\$18,327	5.80	(37)	1.17	\$42
General Merchandise Retailing	372	(20)	(5.2%)	\$24,045	1.58	(98)	1.20	\$444
Healthcare Provider Offices	340	48	16.6%	\$41,838	0.85	13	1.22	\$1,289
Home and Residential Care	290	(64)	(18.1%)	\$22,645	0.86	(87)	1.14	\$589
Coal Mining	280	10	3.8%	\$92,307	70.59	111	2.08	\$48
Social Service Organizations	273	(1)	(0.3%)	\$27,013	1.11	(185)	1.14	\$457
Specialty Contractors	261	(19)	(6.7%)	\$39,633	0.63	(63)	1.18	\$432
Accommodations and Related Services	252	(1)	(0.3%)	\$16,290	1.82	(25)	1.17	\$391
Communications Services	228	16	7.8%	\$67,104	3.81	28	2.25	\$2,125
Local Transportation Services	213	(47)	(18.1%)	\$38,502	1.26	(70)	1.21	\$383
Support Activities for Oil and Gas Operations	208	(221)	(51.5%)	\$63,198	11.78	(138)	1.21	\$178

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Traded Cluster Name	2017 Jobs	'12-'17 Jobs Change	'12-'17 % Jobs Change	Median Earnings	2017 LQ	12-'17 Competitive Effect	Jobs Multiplier	Unmet Demand in Greater Region (\$M)
Ground Transportation Support Activities	195	50	34.5%	\$61,212	4.75	30	1.46	\$157
State Government	167	(20)	(10.6%)	\$52,387	1.04	(19)	4.34	\$1,960
Child Care Services	152	(5)	(3.4%)	\$23,926	1.73	4	1.12	\$95
Retail Food Stores	130	(16)	(10.7%)	\$24,651	0.61	(26)	1.22	\$542
Electric Power Distribution	127	29	30.0%	\$99,752	8.60	27	2.44	\$245
Military	122	(7)	(5.2%)	\$21,506	0.91	2	1.26	\$6,893
Deposit-taking Institutions	121	1	0.9%	\$51,836	1.08	(1)	1.55	\$376
General Contractors	111	5	5.1%	\$33,747	0.84	(15)	1.13	\$291
Real Estate Services	105	(1)	(1.4%)	\$26,275	0.69	(13)	1.35	\$327
Building Support Services	100	15	17.5%	\$15,035	0.89	5	1.07	\$256
Trucking	95	34	55.7%	\$44,449	1.80	31	1.24	\$13
Fossil Fuel Electric Power	93	(38)	(28.6%)	\$83,206	14.28	(30)	2.22	\$254
Automotive Parts Retailing	87	23	36.5%	\$29,404	2.19	19	1.23	\$60
Agricultural Services	86	3	4.2%	\$20,768	0.84	2	1.19	\$1,993
Local Professional Services	78	(50)	(39.3%)	\$33,672	0.18	(61)	1.16	\$790
Automobile Dealers	73	9	14.6%	\$41,154	0.79	(2)	1.32	\$432
Other Personal Services	73	(61)	(45.5%)	\$15,346	0.54	(48)	1.18	\$166
Pipeline Transportation	72	(21)	(22.2%)	\$94,655	20.77	(33)	1.93	\$119
Job Training Services	71	38	115.6%	\$24,180	2.44	42	1.09	\$34
Personal Care and Cleaning Products	70	30	75.5%	\$46,341	9.13	28	1.51	\$328
Federal Government	70	(4)	(5.1%)	\$58,725	0.43	(3)	1.40	\$20,428
Gambling Facilities	58	38	194.8%	\$22,418	6.35	38	1.34	\$175
Wood Processing	57	(0)	(0.1%)	\$31,209	7.36	(6)	1.65	\$144
Hair Care Services	50	(26)	(34.4%)	\$14,588	0.67	(31)	1.10	\$72
Business Support Services	50	(31)	(38.4%)	\$44,573	0.44	(58)	1.24	\$512
Insurance Agents and Brokers	49	(7)	(13.2%)	\$34,802	0.62	(17)	1.34	\$43
Miscellaneous Repair Services	45	(23)	(33.4%)	\$48,774	1.78	(26)	1.21	\$10
Wholesale of Petroleum and Petroleum Products	44	26	145.1%	\$62,572	6.42	26	1.49	\$55
Consulting Services	42	(22)	(34.7%)	\$47,944	0.45	(28)	1.19	\$311

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Traded Cluster Name	2017 Jobs	'12-'17 Jobs Change	'12-'17 % Jobs Change	Median Earnings	2017 LQ	12-'17 Competitive Effect	Jobs Multiplier	Unmet Demand in Greater Region (\$M)
Automotive Repair Shops	41	(16)	(27.7%)	\$28,202	0.69	(20)	1.13	\$21
Rental and Leasing	40	(21)	(34.1%)	\$70,513	3.63	(30)	1.88	\$55
Beer, Wine, and Liquor Retailing	40	(2)	(5.0%)	\$19,112	3.45	(6)	1.14	\$65
Gardening Products and Supplies Retailing	39	(3)	(6.7%)	\$20,834	2.33	(7)	1.25	\$56
Other Waste Management Services	39	(16)	(29.3%)	\$45,465	30.56	(27)	1.34	\$1
Corporate Headquarters	37	18	94.5%	\$50,605	0.23	15	1.28	\$1,911
Wholesale of Chemical and Allied Products	36	(49)	(57.6%)	\$84,234	3.84	(52)	1.71	\$48
Farm Management and Labor Services	34	2	7.9%	\$17,637	1.39	(1)	1.02	\$25
Personal Products Retailing	34	18	113.5%	\$12,409	0.90	15	1.20	\$112
Hardware Retailing	33	(5)	(13.4%)	\$20,918	2.93	(8)	1.20	\$42
Movie Theatres	32	7	26.2%	\$16,807	3.12	3	1.13	\$1
Spectator Sports	32	25	347.4%	\$5,453	2.36	24	1.05	\$26
Landscape and Horticultural Services	30	(4)	(10.5%)	\$14,219	0.36	(8)	1.06	\$104
Recreational Facilities and Instruction	30	8	34.6%	\$6,440	0.33	5	1.08	\$120
Religious Organizations	29	9	43.1%	\$15,801	0.24	8	1.19	\$12
Apparel Retailing	29	(5)	(14.6%)	\$6,110	0.32	(5)	1.10	\$188
Nonmetal Mining	25	(2)	(8.3%)	\$15,544	3.60	(3)	1.30	\$136
Newspapers	24	18	284.4%	\$20,615	1.99	20	1.12	\$38
Other Tourism Attractions	24	2	6.8%	\$20,692	0.97	(3)	1.25	\$41
Furniture and Home furnishings Retailing	22	9	63.1%	\$12,506	0.55	8	1.19	\$92
Industrial Machinery	22	13	157.7%	\$84,667	2.00	14	1.41	\$158
Testing Laboratories	20	(24)	(54.8%)	\$35,255	1.69	(26)	1.22	\$26
Alternative Electric Power	19	4	23.6%	\$82,936	4.19	(11)	2.33	\$305
Other Motor Vehicles Distribution	17	12	194.2%	\$23,964	1.42	10	1.36	\$27
Highway and Street Construction	17	12	234.3%	\$38,807	0.70	11	1.16	\$7
Engineering Services	17	(23)	(57.9%)	\$74,623	0.24	(25)	1.40	\$65
Construction Materials Retailing	16	4	31.7%	\$23,117	0.23	2	1.22	\$186

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Traded Cluster Name	2017 Jobs	'12-'17 Jobs Change	'12-'17 % Jobs Change	Median Earnings	2017 LQ	12-'17 Competitive Effect	Jobs Multiplier	Unmet Demand in Greater Region (\$M)
Drug Stores	16	(1)	(6.8%)	\$38,171	0.31	(2)	1.38	\$296
Drilling Wells	16	11	260.7%	\$91,760	3.77	13	1.35	\$80
Electronic Media	15	(7)	(30.1%)	\$16,726	0.96	(5)	1.40	\$173
Organic Chemicals	15	15	0.0%	\$80,842	2.39	15	3.13	\$552
Food Wholesaling	15	(5)	(27.3%)	\$0	0.35	(6)	1.29	\$115
Natural Gas Distribution	15	(5)	(24.4%)	\$75,670	1.86	(5)	2.54	\$113
Industrial Products and Services Wholesaling	14	(8)	(35.4%)	\$25,268	1.03	(4)	1.21	\$50
Computer Services	14	(2)	(12.2%)	\$0	0.08	(6)	1.18	\$771
Recreational and Other Services	14	8	116.7%	\$6,944	1.19	6	1.03	\$5
Credit Intermediation	14	1	10.0%	\$0	0.20	0	1.42	\$330
Other Automotive Services	14	(10)	(42.2%)	\$0	0.51	(13)	1.15	\$27
Electronic and Photographic Retailing	14	(2)	(15.0%)	\$24,493	0.41	(2)	1.26	\$135
Vending and Direct Selling	13	1	5.2%	\$0	0.87	0	1.05	\$9
Wholesale of Service Establishment Equipment, and Supplies	13	(15)	(52.8%)	\$40,865	3.33	(16)	1.33	\$8
Repair Services	12	2	20.5%	\$18,245	1.77	2	1.05	\$27
Laundry and Linen Services	12	5	61.0%	\$0	0.62	5	1.19	\$16
Performing Artists	12	(5)	(30.7%)	\$20,120	0.37	(8)	1.02	\$127
Wholesale of Industrial Machinery, Equipment, and Supplies	11	(44)	(79.5%)	\$0	0.41	(47)	1.54	\$127
Tobacco Retailing	11	8	251.1%	\$15,619	2.67	7	1.14	\$24
Industrial Machinery and Distribution	10	(6)	(36.9%)	\$0	0.49	(5)	1.10	\$130
Gifts and Souvenirs Retailing	9	2	20.5%	\$0	0.81	2	1.07	\$50
Securities Brokers, Dealers, and Exchanges	9	2	21.3%	\$0	0.24	2	1.34	\$528
Other Marketing Related Services	9	4	78.3%	\$0	0.25	2	1.25	\$216
Architectural and Drafting Services	9	0	5.2%	\$0	0.48	(0)	1.22	\$60
Warehousing and Storage	8	7	882.5%	\$0	0.11	7	1.15	\$114

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Traded Cluster Name	2017 Jobs	'12-'17 Jobs Change	'12-'17 % Jobs Change	Median Earnings	2017 LQ	12-'17 Competitive Effect	Jobs Multiplier	Unmet Demand in Greater Region (\$M)
Industrial Repair Services	8	1	18.0%	\$0	2.70	1	1.34	\$1
Petroleum Processing	8	(22)	(73.8%)	\$0	1.43	(21)	15.37	\$47
Metal Processing	7	3	78.7%	\$0	0.32	3	1.24	\$471
Wholesale of Professional and Commercial Equipment and Supplies	7	1	15.7%	\$0	0.15	1	1.20	\$650
Warehousing Services	7	(4)	(37.6%)	\$0	1.05	(6)	1.27	\$2
Water and Sewer Line Construction	7	(7)	(50.8%)	\$0	0.49	(9)	1.20	\$85
Tax Return Preparation Services	6	(0)	(4.2%)	\$0	0.65	(0)	1.06	\$23
Air Transportation	6	(4)	(36.9%)	\$0	0.13	(6)	1.47	\$139
Wholesale of Electrical and Electronic Goods	6	6	0.0%	\$0	0.26	6	1.49	\$311
Ammunition	6	6	0.0%	\$0	1.83	5	1.16	\$32
Waste Processing	5	4	208.9%	\$0	1.01	4	1.62	\$62
Labor Organizations	5	4	315.8%	\$0	0.70	4	1.01	\$38
Wholesale Trade Agents and Brokers	5	(1)	(21.4%)	\$0	0.08	(2)	1.42	\$321
Sewing, Needlework, and Piece Goods Retailing	5	1	35.5%	\$0	1.58	2	1.05	\$3
Training Programs	5	2	51.3%	\$0	0.20	1	1.05	\$38
Apparel Contractors	4	4	0.0%	\$0	1.39	5	1.10	\$38
Forestry	4	(8)	(63.7%)	\$0	0.64	(8)	1.53	\$33
Sporting and Hobby Retailing	4	(3)	(44.3%)	\$0	0.13	(4)	1.11	\$43
Process Equipment and Components	4	4	0.0%	\$0	0.26	4	1.36	\$248
Colleges, Universities, and Professional Schools	4	1	40.2%	\$0	0.01	1	1.14	\$828
Electronic and Catalog Shopping	4	1	49.6%	\$0	0.11	0	1.09	\$218
Bus Transportation	4	4	0.0%	\$0	1.08	4	1.25	\$11
Collection Agencies	3	(4)	(54.9%)	\$0	0.37	(4)	1.19	\$1
Wholesale of Jewelry, Watches, Precious Stones, and Precious Metals	3	2	305.6%	\$0	1.10	3	1.28	\$9
Funeral Service and Crematories	3	(0)	(13.7%)	\$0	0.32	(1)	1.26	\$20

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Traded Cluster Name	2017 Jobs	'12-'17 Jobs Change	'12-'17 % Jobs Change	Median Earnings	2017 LQ	12-'17 Competitive Effect	Jobs Multiplier	Unmet Demand in Greater Region (\$M)
Security Services	3	2	345.4%	\$0	0.05	2	1.24	\$172
Water, Sewage, and Other Systems	3	3	0.0%	\$0	0.83	3	1.17	\$18
Cultural and Educational Entertainment	3	1	133.7%	\$0	0.19	1	1.02	\$64
Insurance Carriers	2	(2)	(52.5%)	\$0	0.03	(3)	3.02	\$1,659
Video Production and Distribution	2	(1)	(31.0%)	\$0	0.09	(2)	1.56	\$160
Fabricated Metal Structures	2	(22)	(91.3%)	\$0	0.25	(23)	1.41	\$43
Financial Investment Activities	2	1	36.5%	\$0	0.05	0	1.19	\$2,020
Men's Clothing	2	2	0.0%	\$0	1.11	2	1.10	\$30
Medical Laboratories	2	2	0.0%	\$0	0.09	2	1.29	\$13
Accessories and Specialty Apparel	2	1	170.4%	\$0	0.43	1	1.05	\$34
Employment Placement Services	2	(5)	(70.8%)	\$0	0.09	(5)	1.22	\$12
Metalworking Machinery	2	1	132.4%	\$0	0.21	1	1.06	\$101
Business Associations	2	1	172.4%	\$0	0.22	1	1.12	\$43
Building Equipment Distribution	2	(2)	(48.0%)	\$0	0.15	(2)	1.45	\$89
Fabric Mills	2	2	779.2%	\$0	0.46	2	1.10	\$69
Wholesale of Farm Products and Supplies	2	(8)	(83.6%)	\$0	0.11	(9)	1.51	\$134
Promoters and Managers	2	1	93.3%	\$0	0.12	0	1.15	\$79
Ground Passenger Transportation	2	(0)	(12.0%)	\$0	0.09	(1)	1.03	\$121
Household Textile Products	2	2	0.0%	\$0	0.41	2	1.03	\$75
Automotive Parts Wholesaling	1	1	60.2%	\$0	0.09	1	1.41	\$138
Wholesale of Construction and Mining Machinery and Equipment	1	(3)	(68.0%)	\$0	0.24	(3)	1.68	\$14
Publishing	1	(1)	(33.4%)	\$0	0.04	(2)	1.23	\$941
Local Passenger Transportation	1	1	0.0%	\$0	0.04	1	1.18	\$149
Agricultural and Construction Machinery and Components	1	(3)	(72.6%)	\$0	0.07	(3)	1.13	\$458

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Traded Cluster Name	2017 Jobs	'12-'17 Jobs Change	'12-'17 % Jobs Change	Median Earnings	2017 LQ	12-'17 Competitive Effect	Jobs Multiplier	Unmet Demand in Greater Region (\$M)
Specialty Air Transportation	1	1	0.0%	\$0	0.48	1	1.20	\$53
Women's Clothing	1	1	0.0%	\$0	0.68	1	1.09	\$36
Design Services	1	(8)	(89.1%)	\$0	0.05	(9)	1.15	\$38
Trusts	1	1	0.0%	\$0	0.19	1	1.45	\$70
Printing Services	1	(3)	(75.3%)	\$0	0.03	(3)	1.13	\$186
Meat Processing	1	(0)	(19.4%)	\$0	0.02	(0)	1.47	\$591
Heating Oil and Other Fuel Dealers	1	(2)	(71.1%)	\$0	0.15	(2)	1.14	\$63
Commercial Photography, Printing and Sign making	1	1	0.0%	\$0	0.11	1	1.04	\$38
Insurance Related Services	1	(1)	(64.4%)	\$0	0.07	(2)	1.43	\$94
Stationery and Office Supply Retailing	1	(3)	(78.9%)	\$0	0.10	(2)	1.22	\$26
Parking Services	1	0	65.9%	\$0	0.08	0	1.47	\$27
Photographic and Photofinishing Services	1	(4)	(84.3%)	\$0	0.15	(3)	1.10	\$11
Developers	1	(1)	(52.5%)	\$0	0.21	(1)	1.10	\$2
Jewelry Retailing	1	(1)	(62.6%)	\$0	0.07	(1)	1.10	\$46
Educational Support Services	1	(0)	(37.9%)	\$0	0.05	(1)	1.05	\$23
Appliance Retailing	1	(0)	(24.9%)	\$0	0.14	(0)	1.29	\$21
Wholesale of Books, Periodicals, and Newspapers	1	1	0.0%	\$0	0.20	1	1.10	\$9
Textile Bags and Canvas Products	0	(0)	(46.2%)	\$0	0.24	(0)	1.06	\$6
Wood Components and Products	0	0	0.0%	\$0	0.02	0	1.05	\$154
Concrete Products	0	(19)	(97.9%)	\$0	0.04	(23)	1.34	\$6
Advertising Related Services	0	(1)	(71.0%)	\$0	0.01	(1)	1.18	\$104
Wholesale of Toy and Hobby Goods and Supplies	0	(6)	(95.5%)	\$0	0.18	(6)	1.13	\$13
Research Organizations	0	(1)	(79.2%)	\$0	0.01	(1)	3.68	\$739

Appendix B: Index of Site Selection Firms & Consultants

List of Site Selection Organizations

Ady International Company

Janet Ady, President/CEO

315 East Evergreen Ave.

Mount Prospect, IL 60056

608-663-9218

www.adyinternational.com

Ady Voltedge

Paul Hampton, Executive Vice President

613 Williamson Street, Suite 201

Madison, WI 53703

608-663-9218

www.adyvoltedge.com

Angelou Economics

Angelos Angelou, Principal Executive Officer

8121 Bee Cave Road

Suite 200

Austin, TX 78746

512-225-9328

www.angeloueconomics.com

Austin Consulting

Don Schjeldahl, Director,
Renewable Energy Strategies

6095 Parkland Blvd.

Cleveland, OH 44124

440-544-2600

www.theaustinconsulting.com

Barber Business Advisors, LLC

Dean Barber, President

2736 Golfing Green Drive

Dallas, TX 75234

972-767-9518

www.barberadvisors.com

Biggins Lacy Shapiro & Company (BLS & Co.)

Joe Lacy, Managing Director

47 Hulfish Street, Suite 400

Princeton, NJ 8542

609-924-9775

www.sbb-incentives.com

Bingham Economic Development Advisors

Jay Walters, President

8900 Keystone Crossing

Suite 400

Indianapolis, IN 46240

317-968-5572

www.binghameda.com

Binswanger | Atlanta

David Barber

1201 Peachtree Street NE, Suite 1020

400 Colony Square

Atlanta, GA 30361

404-892-4100

www.binswanger.com

Binswanger | Corporate Headquarters

Frank Binswanger, III

Binswanger

Two Logan Square

Philadelphia, PA 19103

215-448-6000

www.binswanger.com

Boyd Company, The

Jack Boyd, Founder

301 N. Harrison Street

Suite 415

Princeton, NJ 8540

609-920-0266

www.theboydcompany.com

Burns Development Group

Linda Burns, Site Consultant

3907 Mediterranean Street

Rockwall, TX 75087

214-402-1882

www.burnsdevelopmentgroup.com

CAI Global Group

Howard Silverman, President/CEO

615 René-Lévesque West

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CB Richard Ellis | Global Client Services
 Calvin Frese, Jr., President, Global Services
 311 South Wacker Drive
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 312-297-7600
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DCG Corplan Consulting LLC
 Bruce Hoch, Managing Director, Location &
 Development Services
 Hutton Park Executive Center
 19 Hutton Ave.
 West Orange, NJ 7052
 973-736-6600
www.dcgcorplan.com

Deloitte Consulting LLP
 Darin Buelow, Principal
 111 S. Wacker Drive
 Chicago, IL 60606
 312-496-2096
www.deloitte.com

Ecodev, LLC
 Dana Olson, President/CEO
 7805 Telegraph Road

Suite 300
 Bloomington, MN 55438
 952-944-0012
www.ecodevllc.com

Foote Consulting Group
 Deane Foote, CEcD
 18910 N. 73rd Drive
 Glendale, AZ 85308
 480-399-4854
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Forsythe & Associates, Inc.
 Jeff Forsythe
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 864-423-2030

Garner Economics LLC
 Jay Garner, CEcD, President
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www.garnereconomics.com

Ginovus
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 317-819-0890
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Global Location Strategies
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 Greenville, SC 29607
 864-281-6230
www.globallocationstrategies.com

Greyhill Advisors
 Daniel Kah
 100 Congress Ave.
 Austin, TX 78701

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512-501-2508

www.greyhill.com

Grubb & Ellis Company | Business Location Services

Noah Shales, Managing Director, Strategic Consulting Group

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Chicago, IL 60661

312-224-3185

www.grubb-ellis.com

Herron Consulting

Joan Herron, President

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Atlanta, GA 30309

404-815-7613

www.herronconsultingservices.com

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Jason Hickey

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763-476-8800

www.hickeyandassociates.com

J.M. Mullis, Inc.

J. Michael Mullis, President/CEO

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Memphis, TN 38125

901-753-0373

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Matt Jackson, Managing Director

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Washington, DC 20006

517-215-5118

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Jones Lang LaSalle | Data Centers

Brian Oley, Vice President

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Kinnett Consulting Group, The

James Kinnett II, CEcD, President

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812-290-5663

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KLG Advisors

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212 514-4600

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513-639-3900

www.kmkconsulting.com

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MaximusAlliance Partners, LLC

John Castro, Managing Director

Location Incentives & Economic Development

3131 McKinney Ave., Suite 540

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Target Industry Implementation Plan

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214-884-4405

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Moran, Stahl & Boyer, LLC
John Rhodes, Senior Principal
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Lakewood Ranch, FL 34211
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www.msbconsulting.com

Parker Poe Consulting
Mark Simmons, Principal
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Columbia, SC 29201
803-255-8000
www.parkerpoeconsulting.com

Pollina Corporate Real Estate
Chicago O'Hare Building, 401 Devon Ave.
Park Ridge, IL 60068
847-685-9000
www.pollina.com

Quest Site Solutions
10 Falcon Crest Drive
Greenville, SC 29607
864-671-1001
<http://www.questsitesolutions.com/>

Silverlode Consulting Corp.
Steve Weitzner, President
2530 Superior Ave., Suite 303
Cleveland, OH 44114
216-263-9000
www.silverlodeconsulting.com

Site Location Partnership (SLP)
Justin Thompson, CEO
6021 Morris Road, Suite 107
Flower Mound, TX 75028
972-874-7483

Site Selection Group
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Dallas TX

214-271-0580

<https://www.siteselectiongroup.com>

Strategic Development Group
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312-440-9070
www.szatanassociates.com

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LLC
Dennis Donovan, Principal
981 US Highway 22 West
Suite 100
Bridgewater, NJ 8807
908-864-5580
www.wdgconsulting.com

Walker Companies, The
Raymond Walker, President
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404-0892-1600
www.walkerco.com

Wallace & Steichen, Inc.
John Wallace, Principal
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Suite 420
Palo Alto, CA 943001
650-328-0447
www.wallacesteichen.com

Site Selection Consultant Bios



Company Services:

- Site Identification and Analysis
- Incentives Negotiation
- Facility expansion Assistance
- Economic Analysis of Site Alternatives
- Site Certification

Specialties:

- Corporate Site Selection
- Technology-based Economic Development
- Public Policy
- Investment Attraction and Marketing

Past Clients:

IBM, Apple, Samsung, Motorola, AMD, Cypress Semiconductor, Applied Materials, Tokyo Electron, and Sematech.

Angelos Angelou

Founder and Principal Executive Officer

AngelouEconomics

Headquarters:
8121 Bee Cave Rd.
Suite. 100
Austin, Texas

Ph. 512-225-9320

Website: <https://www.angeloueconomics.com/>

Geographic Area Served:

North and South America, Europe, and Asia

Area of Expertise:

Hi-Technology and Automotive Industries

Corresponding Target Industries:

- Corporate, Subsidiary, & Regional Managing Offices
- Light Truck & Utility Vehicle Manufacturing
- Research & Development in the Physical, Engineering, & Life Sciences
- Computer Systems Design Services
- Semiconductor & Related Device Manufacturing
- Search, Detection, Navigation, Guidance, Aeronautical, & Nautical System & Instrument Manufacturing
- Custom Computer Programming Services
- Computer Facilities Management Services & Other Computer Related Services



Tracey Hyatt Bosman

Managing Director

Biggins Lacy Shapiro & Company

Headquarters:

47 Hulfish Street
Suite 320
Princeton, New Jersey 08542

Ph. 609-924-9775

Website: <http://www.blstrategies.com/>

Services:

- Site Identification & Analysis
- Incentives Negotiation

Specialties:

- Incentives Negotiations
- Labor Market Research
- Business Cost Analysis

Past Clients:

A&P, ACTEGA, American Electric Power, Avon, Ascension Health, Bloomberg, Bristol-Myers Squibb Company, Burlington, Campbell's, Forbes, Goya, Honeywell, JPMorgan Chase, MetLife, Panasonic, Pearson, Verizon, and TradePoint Atlantic

Geographic Area Served:

North America, Europe and Asia

Area of Expertise:

Technology, Energy, Manufacturing, Consumer Products, Aviation, Aerospace, Retail, Metals, Electronics, Food, Data Centers, and Financial Services

Corresponding Target Industries:

- Corporate, Subsidiary, & Regional Managing Offices
- Aircraft Engine & Engine Parts Manufacturing
- Other Aircraft Parts & Auxiliary Equipment Manufacturing
- Research & Development in the Physical, Engineering, & Life Sciences
- Computer Systems Design Services
- Semiconductor & Related Device Manufacturing
- Search, Detection, Navigation, Guidance, Aeronautical, & Nautical System & Instrument Manufacturing
- Custom Computer Programming Services
- Computer Facilities Management Services & Other Computer Related Services

**Services:**

- Site Identification and Analysis
- Business Attraction and Retention Strategies

Specialties:

- Spatial Economic Development
- Innovation
- Business Parks
- Infrastructure & Financial Analysis
- Urban Area Development

Past Clients:

ABB, Abbott, Barclays, Biogen, BP, Chiquita, Cisco, Crocs, Dell Computers, DHL, Donaldson, Exxon Mobile, Fossil, Fuji Photo Film, Ikea, John Deere, Johnson & Johnson, KraftHeinz Foods, Nike, Novartis, Oracle, Philips, Samsung, Toshiba, UTC, UPS, Vodafone, and Yamaha.

Rene' Buck

Chief Executive Officer

Buck Consultant International

Headquarters:

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Suite 14

Wilmette, Illinois 60091

Ph. 512-225-9320

Website: <http://www.bcglobal.com/home.asp>

Geographic Area Served:

North America, Asia, Europe and Africa.

Area of Expertise:

Technology, Electronics, Industrial Equipment & Products, Automotive, Life Sciences, Medical Technology, Food & Beverage, Chemicals & Materials, Fashion & Apparel, Business Services, and Logistics.

Corresponding Target Industries:

- Corporate, Subsidiary, & Regional Managing Offices
- Light Truck & Utility Vehicle Manufacturing
- Research & Development in the Physical, Engineering, & Life Sciences
- Computer Systems Design Services
- Semiconductor & Related Device Manufacturing
- Search, Detection, Navigation, Guidance, Aeronautical, & Nautical System & Instrument Manufacturing
- Custom Computer Programming Services
- Computer Facilities Management Services & Other Computer Related Services
- General Warehousing & Storage & Process, Physical Distribution, & Logistics Consulting Services

Target Industry Implementation Plan

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Darin M. Buelow

Principal

Deloitte Consulting LLP

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Website:

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Services:

- Site Identification and Analysis
- Incentives Negotiations
- Facilities Deployment

Specialties:

- Capital-intensive manufacturing site selection
- R&D
- Engineering Deployments
- Footprint Analytics
- Global Location Strategy

Corresponding Target Industries:

- Corporate, Subsidiary, & Regional Managing Offices
- Light Truck & Utility Vehicle Manufacturing
- Research & Development in the Physical, Engineering, & Life Sciences
- Computer Systems Design Services
- Semiconductor & Related Device Manufacturing
- Search, Detection, Navigation, Guidance, Aeronautical, & Nautical System & Instrument Manufacturing
- Custom Computer Programming Services
- Computer Facilities Management Services & Other Computer Related Services

Geographic Area Served:

North and South America, Europe, Middle East, Africa, and Asia.

Area of Expertise:

Technology, Industrial Products, Automotive, Steel, Tire, Chemicals, Paper, Food Processing, Financial Services, Life Sciences, Consumer Products, and Renewable Energy

Target Industry Implementation Plan

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Services:

- Relocation Feasibility
- Location Selection
- Labor Market
- Employee Relocation
- Incentives
- Location Strategy
- Due Diligence

Specialties:

- Mining
- Textiles
- Capital Finance

Past Clients:

Sinopec, Kuwait Petroleum, First Quality Enterprises, Brose North America, Conoco, Waterford Wedgwood Rosenthal, Orica, BBA Nonwovens, Berlex, Professional & Civic, Site Selectors Guild, Leadership South Carolina, and International Center of the Upstate

Didi Caldwell

Principal

Global Location Strategies

Headquarters:

100 Fluor Daniel Drive, C302-D
Greenville, South Carolina 29607

Website:

<http://www.globallocationstrategies.com/site-selection-projects/>

Geographic Area Served:

North America, Europe, and Asia

Area of Expertise:

Automotive, Food & Beverage, Advanced Manufacturing, Chemicals, Pulp & Paper, Metal, Energy, Biotech, and Warehouse/Distribution

Corresponding Target Industries:

- Corporate, Subsidiary, & Regional Managing Offices
- Light Truck & Utility Vehicle Manufacturing
- Research & Development in the Physical, Engineering, & Life Sciences
- Semiconductor & Related Device Manufacturing
- Search, Detection, Navigation, Guidance, Aeronautical, & Nautical System & Instrument Manufacturing
- General Warehousing & Storage & Process, Physical Distribution, & Logistics Consulting Services

Target Industry Implementation Plan

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Services:

- Relocation Feasibility
- Location Selection
- Labor Market
- Employee Relocation
- Incentives
- Location Strategy
- Due Diligence

Specialties:

- Corporate Facilities Location
- Incentive Negotiations
- Continuous Innovation in decision tools/models
- Linking Human Resources to Location Strategy
- Growing Revenue (profitability)

Past Clients:

ADP, Ascension Health, Barclays, Beretta, Blue Cross Blue Shield, Brembo, Bristol Myers Squibb, Canon, CNA Insurance, DeMets Candy, Dover, Harbor Freight Tools, Marsh & McLennan, Metalized Carbon, Pitney Bowes

Dennis Donovan

Principal

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Headquarters:

991 US Highway 22 West

Suite 201

Bridgewater, New Jersey 08807

Ph. 908-864-5580

Website:

http://www.wdgconsulting.com/location_strategy.htm

Geographic Area Served:

United States, Canada, Latin America EMEA/Asia via strategic alliance.

Area of Expertise:

Aerospace, Auto Parts, Building Materials, Call Centers, Capital Goods Manufacturing, Claims Processing Centers, Consumer Goods Manufacturing, Distribution, Food, Headquarters, Health, Inside Sales Operations, Metals, Motor Vehicles, Plastics, R&D, Tires, and Shared Service Centers.

Corresponding Target Industries:

- Corporate, Subsidiary, & Regional Managing Offices
- Aircraft Engine & Engine Parts Manufacturing
- Other Aircraft Parts & Auxiliary Equipment Manufacturing
- Light Truck & Utility Vehicle Manufacturing
- Research & Development in the Physical, Engineering, & Life Sciences
- Semiconductor & Related Device Manufacturing
- Search, Detection, Navigation, Guidance, Aeronautical, & Nautical System & Instrument Manufacturing
- General Warehousing & Storage & Process, Physical Distribution, & Logistics Consulting Services



Deane C. Foote

President/CEO

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Ph. 480-399-4854

Website:

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Services:

- Relocation Analysis
- Incentive Analysis and Negotiations
- Real Estate Analysis
- Due Diligence
- Workforce Analysis
- Demographic Analysis

Specialties:

- Site Selection
- Real Estate
- Workforce Development
- Economic Development

Past Clients:

Greater Gallup Chamber of Commerce, MeadWestvaco Corporation, Sisener Ingenieros, Forest City Stapleton, Country Fresh, Inc., and Walmart.

Geographic Area Served:

Tennessee, Arizona, New Mexico, Ohio, Oregon, Michigan, Illinois, Indiana, and North Dakota.

Area of Expertise:

Aerospace, Manufacturing, Consumer Goods, Food Processing, Energy, Call Center, and Retail

Corresponding Target Industries:

- Corporate, Subsidiary, & Regional Managing Offices
- Aircraft Engine & Engine Parts Manufacturing
- Other Aircraft Parts & Auxiliary Equipment Manufacturing
- Light Truck & Utility Vehicle Manufacturing
- Semiconductor & Related Device Manufacturing
- Search, Detection, Navigation, Guidance, Aeronautical, & Nautical System & Instrument Manufacturing



Services:

- Location Strategy
- Site Selection and Analysis
- Incentives
- Close/Sell Existing Sites

Specialties:

- Headquarters relocations
- International Experience
- Risk Management
- Negotiating Complex Incentives Agreements
- Site Visit Programs

Past Clients:

Amy's Kitchen, Brose, Daimler, Greatview Aseptic Packaging, Newlett Packard, Hitachi Data Systems, Hornbach, Hyundai Motor Company, International Flavors & Fragrances, Momentive, Plastic Logic, Sony Entertainment, Visteon, West Pharmaceuticals, and Wrigley.

Andreas Dressler

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Conway Advisory

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Website:

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Geographic Area Served:

North and South America, Middle East, and Europe

Area of Expertise:

Automotive, Advanced Manufacturing, Food Production, Business Process Outsourcing, Customer Service Centers, R&D Centers, Corporate Headquarters

Corresponding Target Industries:

- Corporate, Subsidiary, & Regional Managing Offices
- Light Truck & Utility Vehicle Manufacturing
- Semiconductor & Related Device Manufacturing
- Search, Detection, Navigation, Guidance, Aeronautical, & Nautical System & Instrument Manufacturing



Jay Garner
Founder and President
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Headquarters:
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Website: <http://www.garnereconomics.com/>

Geographic Area Served:
United States: Florida, Georgia, Kansas, North Carolina, Pennsylvania, and Texas. Europe and Asia as well.

Services:

- Site Evaluation
- Comparative Analysis
- Site Due Diligence
- Negotiations

Specialties:

- Selection of Available Existing Building
- Greenfield/Brownfield Sites
- Construction/Expansion of New Facilities

Past Clients:

Academy, Anchor Glass, Future Pipe Industries, Hatfield, Hill's, Lowe's, Primus Builders, Inc., St. Joe, and Stork.

Area of Expertise:

Food Processing, Distribution, and Manufacturing

Corresponding Target Industries:

- Aircraft Engine & Engine Parts Manufacturing
- Other Aircraft Parts & Auxiliary Equipment Manufacturing
- Light Truck & Utility Vehicle Manufacturing
- Semiconductor & Related Device Manufacturing
- Search, Detection, Navigation, Guidance, Aeronautical, & Nautical System & Instrument Manufacturing
- General Warehousing & Storage & Process, Physical Distribution, & Logistics Consulting Services



Mark Williams

President

Strategic Development Group

Headquarters:

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Columbia, South Carolina 29201

Website:

<https://strategicdev.com/>

Services:

- Site Evaluation
- Incentive Procurement
- Cost Modeling
- Site Certification
- Identification of Potential Location Candidates

Geographic Area Served:

United States

Area of Expertise:

Energy, Manufacturing, and Materials

Specialties:

- Heavy Industrial
- Aerospace Manufacturing
- Advanced Materials
- Energy Sectors
- Office Sectors

Corresponding Target Industries:

- Aircraft Engine & Engine Parts Manufacturing
- Other Aircraft Parts & Auxiliary Equipment Manufacturing
- Light Truck & Utility Vehicle Manufacturing
- Semiconductor & Related Device Manufacturing
- Search, Detection, Navigation, Guidance, Aeronautical, & Nautical System & Instrument Manufacturing

Past Clients:

TBD



Services:

- Site Evaluation
- Incentive Procurement
- Cost Modeling
- Site Certification
- Identification of Potential Location Candidates

Specialties:

- Heavy Industrial
- Aerospace Manufacturing
- Advanced Materials
- Energy Sectors
- Office Sectors

Past Clients:

Cytec Engineered Materials, American Titanium Works, Alenia Aeronautica's C27J aircraft, Eastman Chemical Company, PET plant, Nissan, Boeing 7E7, and Tennessee Valley Authority.

Jeannette Goldsmith

Vice President

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Geographic Area Served:

United States

Area of Expertise:

Energy, Manufacturing, and Materials

Corresponding Target Industries:

- Aircraft Engine & Engine Parts Manufacturing
- Other Aircraft Parts & Auxiliary Equipment Manufacturing
- Light Truck & Utility Vehicle Manufacturing
- Semiconductor & Related Device Manufacturing
- Search, Detection, Navigation, Guidance, Aeronautical, & Nautical System & Instrument Manufacturing



Services:

- Site Evaluation
- Workplace Strategy
- Industrial & Logistics
- Energy & Sustainability
- Labor Analytics

Specialties:

- Expansion
- Consolidation
- Relocation
- Divestiture
- M&A Projects

Past Clients:

McKesson, MSC Industrial Supply Co., Yelp, Citigroup, Cobalt Capital Partners, Standard Chartered Bank, Intercontinental Exchange Group, and CWC Capital Asset Management.

Will Hearn

Senior Vice President

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Website: <https://www.cbre.com/>

Geographic Area Served:

North and South America, Asia, and Europe

Area of Expertise:

Manufacturing, Data Centers, Chemical and Process Manufacturing, Finance & Insurance, Biotech & Life Sciences, R&D, and Energy

Corresponding Target Industries:

- Corporate, Subsidiary, & Regional Managing Offices
- Aircraft Engine & Engine Parts Manufacturing
- Other Aircraft Parts & Auxiliary Equipment Manufacturing
- Light Truck & Utility Vehicle Manufacturing
- Research & Development in the Physical, Engineering, & Life Sciences
- Semiconductor & Related Device Manufacturing
- Search, Detection, Navigation, Guidance, Aeronautical, & Nautical System & Instrument Manufacturing
- Computer Facilities Management Services & Other Computer Related Services



Mike Mullis

President & CEO

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Memphis, Tennessee 38125

Website: <http://jmmullis.com/services/>

Services:

- Site Analysis
- Site Selection
- Feasibility Studies
- Site Due Diligence
- Site Evaluation
- Logistics Integration

Specialties:

- Workforce Analysis/Development
- Real Estate
- Incentives Negotiations
- Financing
- Physical Development

Geographic Area Served:

North and South America, Europe, and Asia

Area of Expertise:

Aerospace, Automotive, Food Processing, Distribution, E-Commerce, and Headquarters relocation.

Corresponding Target Industries:

- Corporate, Subsidiary, & Regional Managing Offices
- Aircraft Engine & Engine Parts Manufacturing
- Other Aircraft Parts & Auxiliary Equipment Manufacturing
- Light Truck & Utility Vehicle Manufacturing
- Semiconductor & Related Device Manufacturing
- Search, Detection, Navigation, Guidance, Aeronautical, & Nautical System & Instrument Manufacturing
- General Warehousing & Storage & Process, Physical Distribution, & Logistics Consulting Services

Past Clients:

Academy Sports + Outdoors, American Eagle Outfitters, AutoZone, Boeing, Briggs & Stratton, Continental, Hormel, Kohler, MARS, Pirelli, Rockwell Automation, Spirit AeroSystems, Tractor Supply Company, Toyota, and Walmart.



Services:

- Site Selection
- Labor Market Studies
- Incentives Negotiations and Compliance
- Global Footprint Analysis
- Supply Chain Network Optimization
- Cost Segregation Services

Specialties:

- Financial and Tax Advisory Services
- Expansions
- Consolidations
- Dispositions
- Relocations

Past Clients:

Albamarle, Cessna, eBay, FedEx Ground, Lowes Companies, Mercedes Benz, NBCUniversal, Panasonic, Quaker Oats Company, RSI Home Products, Shell Oil, Sony Corporation, Tenneco, Tesoro, and The Home Depot

Jim Renzas

Principle
The RSH Group

Headquarters:
75145 Irvine Center Drive
Suite 200
Irvine, California 92618

Website: <http://www.thershgroup.com/SITE-SELECTION.html>

Geographic Area Served:

United States, Mexico, and Canada

Area of Expertise:

Automotive, Biotech, Corporate Headquarters, Distribution, Energy, Expert Witness Services, Financial Services, Food Processing, Health Care, Hospitality, Manufacturing, R&D, Retail, and Telecommunications.

Corresponding Target Industries:

- Corporate, Subsidiary, & Regional Managing Offices
- Aircraft Engine & Engine Parts Manufacturing
- Other Aircraft Parts & Auxiliary Equipment Manufacturing
- Light Truck & Utility Vehicle Manufacturing
- Semiconductor & Related Device Manufacturing
- Search, Detection, Navigation, Guidance, Aeronautical, & Nautical System & Instrument Manufacturing
- General Warehousing & Storage & Process, Physical Distribution, & Logistics Consulting Services

**Services:**

- Site Selection Analysis
- Incentive Negotiations
- Economic Development Strategy

Specialties:

- Raw Material Sourcing Alternatives
- Seasonal Considerations
- Transportation Costs and Service Characteristics
- Facility Capacity Constraints
- Facility Costs
- Competitor Strategies

Past Clients:

Alkermes Pharmaceuticals, Amy's Kitchen, Armstrong World Industries, Avery Dennison, Avon Cosmetics, Carvel-Celebration Foods, Colgate-Palmolive, Deschutes Brewing, Dole Fresh Vegetables, Eaton Marine, Ghirardelli Chocolates, Lindt & Sprungli, Pepsi Cola, Sierra Nevada Brewing, and Sundstrand Corporation.

Don Schjeldahl*Principal*

DSG Advisors

Headquarters:

122 N. Mantua St.
Kent, Ohio 44240

Website: <http://dsg-advisors.com/>

Geographic Area Served:

North and Central America, Europe, and Japan

Area of Expertise:

Aerospace, Automotive, Broadcasting, Craft Brewing, Food Processing, General Manufacturing, Printing and Publishing, Renewable Energy Systems, Soft Drink and Water Bottling, and Specialty Chemicals.

Corresponding Target Industries:

- Aircraft Engine & Engine Parts Manufacturing
- Other Aircraft Parts & Auxiliary Equipment Manufacturing
- Light Truck & Utility Vehicle Manufacturing
- Software Publishers
- Semiconductor & Related Device Manufacturing
- Search, Detection, Navigation, Guidance, Aeronautical, & Nautical System & Instrument Manufacturing
- Internet Publishing & Broadcasting & Web Search Portals



Ulrich Schmidt

Managing Director
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Website:

<https://home.kpmg.com/us/en/home.html>

Services:

- Site Selection
- Multi-state Tax Issues
- Business Incentives

Geographic Area Served:

Global

Specialties:

- Labor Availability and Quality
- Tax Abatements and Exemptions
- Utilities
- Cost Models

Area of Expertise:

Life Sciences, Financial Services, Consumer Markets, Information Technology, and Manufacturing Industries.

Corresponding Target Industries:

- Corporate, Subsidiary, & Regional Managing Offices
- Aircraft Engine & Engine Parts Manufacturing
- Other Aircraft Parts & Auxiliary Equipment Manufacturing
- Light Truck & Utility Vehicle Manufacturing
- Research & Development in the Physical, Engineering, & Life Sciences
- Computer Systems Design Services
- Semiconductor & Related Device Manufacturing
- Search, Detection, Navigation, Guidance, Aeronautical, & Nautical System & Instrument Manufacturing
- Custom Computer Programming Services
- Computer Facilities Management Services & Other Computer Related Services



John F. Sisson

Executive Managing Director
Next Move Group

Headquarters:
515 Olive Street,
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St. Louis, Missouri 63101

Website:

<http://www.thenextmovegroup.com/index.php>

Services:

- Site Selection Analysis
- Incentive Negotiations
- Logistics Analysis
- Cite Certification

Specialties:

- Engineering
- Real Estate
- Logistics
- Headquarter Relocation

Geographic Area Served:

United States, Canada, and Mexico

Area of Expertise:

Chemical, Plastics, Advanced Manufacturing, Call Centers, Paper Mills, Consumer Products, Distribution Centers, and Food Processing.

Corresponding Target Industries:

- Corporate, Subsidiary, & Regional Managing Offices
- Research & Development in the Physical, Engineering, & Life Sciences
- Semiconductor & Related Device Manufacturing
- Search, Detection, Navigation, Guidance, Aeronautical, & Nautical System & Instrument Manufacturing
- General Warehousing & Storage & Process, Physical Distribution, & Logistics Consulting Services

Past Clients:

AMOCO, AT&T, Caterpillar, Consumer Energy Company, General Motors, Heinz, Kuwait Petroleum, Lowe's, Navistar, Republic Paperboard, Sasol, Sinopec, Shell Oil Company, Smorgan Steel, and Wacker Chemie AG.



Jerry Szatan

Owner

Szatan & Associates

Headquarters:

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Website: <http://www.szatanassociates.com/>

Services:

- Site Selection Analysis
- Incentives Negotiation Services
- Labor Market Evaluation
- Economic Development Strategy
- Relocation Feasibility Analysis
- Location Strategy Analysis

Specialties:

- Real Estate Development Feasibility
- Labor Markets
- Rural Site Selection
- Green Economic Development
- Intermodal Freight Development
- Facility Consolidation Issues

Corresponding Target Industries:

- Corporate, Subsidiary, & Regional Managing Offices
- Aircraft Engine & Engine Parts Manufacturing
- Other Aircraft Parts & Auxiliary Equipment Manufacturing
- Light Truck & Utility Vehicle Manufacturing
- Research & Development in the Physical, Engineering, & Life Sciences
- Semiconductor & Related Device Manufacturing
- Search, Detection, Navigation, Guidance, Aeronautical, & Nautical System & Instrument Manufacturing
- General Warehousing & Storage & Process, Physical Distribution, & Logistics Consulting Services

Geographic Area Served:

United States, Canada, and Mexico

Area of Expertise:

Headquarters, R&D, Manufacturing, Distribution Centers, Call Centers, Back Offices, Corporate Facilities

Past Clients:

Boar's Head Brand, Carlson Wagonlit Travel, Davis Selected Advisors, Equiserve, First Card, GAF, Inc., Hewitt Associates, Nature's Path, Organics LaGrange, Sun Microsystems, Union Pacific Railroad, Waste Management, and Wausau Insurance.



Services:

- Site Selection Analysis
- Market Analysis

Specialties:

- Labor Market Evaluations
- Salary Benchmark Studies
- Environment and Regulator Assessments
- Comprehensive Decision Modeling
- GIS mapping
- Quality of Life Research
- Employee Retention Analysis
- Technical Infrastructure

Past Clients:

Apple Computer, AFLAC, CVS, Maytag, Meriel, T-Mobile, and Yahoo!

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Geographic Area Served:

United States, Canada, and Mexico

Area of Expertise:

Contact Centers, Banking and Financial Institutions, Data Centers, Energy, Healthcare, Higher Education, Hotels and Hospitality, Industrial and Logistics, Life Sciences, Technology

Corresponding Target Industries:

- Corporate, Subsidiary, & Regional Managing Offices
- Aircraft Engine & Engine Parts Manufacturing
- Other Aircraft Parts & Auxiliary Equipment Manufacturing
- Light Truck & Utility Vehicle Manufacturing
- Research & Development in the Physical, Engineering, & Life Sciences
- Computer Systems Design Services
- Semiconductor & Related Device Manufacturing
- Search, Detection, Navigation, Guidance, Aeronautical, & Nautical System & Instrument Manufacturing
- Custom Computer Programming Services
- Computer Facilities Management Services & Other Computer Related Services

Appendix C: Detailed Business Recruitment Information

Companies in this section are aligned with identified targets for Uinta and South Lincoln Counties at the six-digit NAICS level for business lead identification. NAICS codes for identified target industries were inputted into Gazelle.ai, a tool that identifies the likelihood a business is to expand or relocate their facilities. Gazelle.ai ranks companies with a G-score, an artificial intelligence ("AI") powered metric from 1 to 6 that indicates how likely a company is to expand based on a proprietary algorithm. A G-score of 5 means that the data signals are pointing toward imminent expansion. The Gazelle.ai also collects human intelligence and when it gets confirmation of an expansion project, that score becomes a 6. All companies listed below have a G-score of either a 5 or 6.

Table C1. Hortau Business Profile

Hortau	
Location: San Luis Obispo, CA	Related Industry: Blockchain/data processing
Revenue: \$10M	Employees: 180
Phone: 1 805-545-5994	Website: hortau.com
Project Description/Company: Founded in 2002, Hortau provides irrigation management solutions and software (wireless irrigation field technology combined with cloud-based software for crops). The company is looking to strengthen its US presence and is considering establishing a service and R&D office in the North Western US. This establishment would employ over 5 sales specialists, researchers, agronomists and field technicians as more projects develop. The company is looking for a brownfield expansion of approximately 5,000 sq. ft.	

Table C2. Touchcorp Business Profile

Touchcorp	
Location: Melbourne, Australia	Related Industry: Blockchain/data processing
Revenue: \$42.3M	Employees: 175
Phone: +61 1300 100 729	Website: touchcorp.com
Project/Company Description: Touchcorp is a payment processing technology company specializing in delivering frictionless omni-channel payments and integrated customer experience.	

Table C3. Blockstream Business Profile

Blockstream	
Location: Quebec, Canada	Related Industry: Blockchain/data processing
Revenue: N/A	Employees: 75
Phone: +1 415-738-8430	Website: blockstream.com
Project/Company Description: Blockstream is the global leader in Bitcoin and blockchain technology. Blockstream builds products and networks that make Bitcoin related financial markets more efficient. Blockstream develops sidechains, which enable the introduction of brand-new features to Bitcoin, as well as the issuance of new digital assets. Blockstream was founded in 2014, with offices and team members distributed around the world.	

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Table C4. GreenMantra Technologies, Inc. Business Profile

GreenMantra Technologies Inc.	
Location: Ontario, Canada	Related Industry: Downstream Chemical Products Mfg.
Revenue: N/A	Employees: N/A
Phone: +1 519-512-2015	Website: greenmantra.com
Project/Company Description: GreenMantra Technologies Inc. works in clean technology to create high-value additives and specialty chemicals from waste plastics. The company is considering setting up a manufacturing facility in the United States in the next 1-3 years. The plant is likely to require 100,000 sq. ft. in space and employ 25-40 (approximately 25 skilled staff and 15 non-skilled staff). The main considerations for the location are the cost of utilities, and proximity to GreenMantra's current client base; or room to expand the company' client base within a certain geography.	

Table C5. Wacker Chemie Business Profile

Wacker Chemie	
Location: Munich, Germany	Related Industry: Downstream Chemical Products Mfg.
Revenue: 5.8B	Employees: 13,811
Phone: +49 89 62790	Website: wacker.com
Project/Company Description: Wacker Chemie AG is a chemical company with a wide range of specialty chemical products including silicone rubbers, polymer products, chemical materials, polysilicon and wafers for semiconductor industry. Demand for silicone rubber materials is growing globally and capacity expansions are in the pipeline for the materials with demand being largely driven by growth in the automotive and medical industries.	
As part of its expansion strategy, Wacker is opening a new silicone elastomers plant in South Korea with a focus on electronics. Construction work on the \$18.8 million facility started in July 2016 with production slated to begin in the first quarter of 2018. The company is considering further investments in silicone rubber production in the United States in the next 1-3 years, with a focus on meeting increased demand globally.	

Table C6. Vestas Business Profile

Vestas	
Location: Aarhus, Denmark	Related Industry: Wind Turbine Manufacturing
Revenue: \$9.2B	Employees: 30,000
Phone: +45 97 30 00 00	Website: vestas.com
Project/Company Description: Vestas is a manufacturer seller, installer, and servicer of wind turbines and is looking to expand its footprint and promote wind energy globally. Vestas's sole focus is wind power and has installed more than 38,000 wind turbines in 63 countries on five continents. Vestas installs an average of one wind turbine every three hours and predicts that 10% of the world's electricity production will come from wind power by 2020.	

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Table C7. Testia Business Profile

Testia	
Location: Toulouse, France	Related Industry: Aerospace Manufacturing
Revenue: \$35M	Employees: 200
Phone: +33 5 34 36 12 00	Website: testia.com
Project/Company Description: Testia is an AIRBUS company working in the field of non-destructive testing, quality inspections, and training in aerospace. While the company does not have precise plans to establish its physical presence in the USA, it has been a point of discussion in the past years. The main driver for expansion is the proximity of clients and a qualified workforce.	
The closeness of a location in the Midwest to Canada's aerospace cluster is very attractive as well, specifically in relations to Boeing and Bombardier. The company would start its presence with a testing facility employing 3-10 people and personnel would need to be certified for testing and inspection.	

Table C8. IABG Industrieanlagen-Betriebsgesellschaft MBH Business Profile

IABG Industrieanlagen-Betriebsgesellschaft MBH	
Location: Ottobrunn, Germany	Related Industry: Aerospace Manufacturing
Revenue: \$160M	Employees: 1,000
Phone: +49 89 60880	Website: iabg.de
Project/Company Description: IABG MBH began as an analysis and testing organization for the aerospace industry and the German Ministry of Defense. IABG MBH was privatized in 1993 and now specializes in full scale testing for diverse sectors such as automotive, mobility, energy and environment, aeronautics, space and defense, and security. Testing in the aerospace sector is the main structural activity of the organization with partners such as Bombardier and Airbus. The company also does testing for automotive OEMs such as BMW.	
IABG is in the process of expanding its operations in the United States with the ideal expansion type being an engineering office and testing facility. The project would require a team with an expertise in the aviation sector, although IABG wants a point of contact for all its service spectrum for the many industries it serves. The number of employees as well as the investments required to develop the project is undetermined for now.	

Table C9. SIMEX Srl Business Profile

SIMEX Srl	
Location: Bologna, Italy	Related Industry: Mining Machinery and Oil & Gas Machinery Manufacturing
Revenue: \$35M	Employees: 92
Phone: +39 051 681 0609	Website: simex.it
Project/Company Description: SIMEX Srl is active in the production of earthmoving attachments used to perform compaction, crushing and milling. The United States is one of Simex's main markets. In order to better serve the market, the company is contemplating establishing a physical presence in the country. The company is in the early stages of expansion and the team is looking forward to exploring further during the World of Concrete conference. The company is looking to establish a warehouse or a production facility in the United States.	

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Table C10. LEAX Group AB Business Profile

LEAX Group AB	
Location: Koping, Sweden	Related Industry: Mining Machinery and Oil & Gas Machinery Manufacturing
Revenue: 1.5B	Employees: 1,300
Phone: +46 221 346 00	Website: leax.com
Project/Company Description: LEAX Group AB is a contract manufacturer servicing the commercial vehicle and automotive, mining and construction, agriculture, and general machining industries. The company specializes in symmetrical rotation geometries and powertrain components for the heavy vehicle industry. LEAX also manufactures parts for the construction and mining industry such as threads, splines, and long hole drilling components. The company is in the process of location scouting for a manufacturing facility in the United States within the next 1-3 years to meet demand in the U.S. The facility would employ 100 employees (mainly engineers and technical people), it would require a greenfield of roughly 90,000 SF. and a building of 40,000-50,000 SF. The company may look for acquisition as a second option for its US operations. LEAX is primarily looking at sites in the southeast but remains open at all regions.	

Table C11. Liberty Ammunition Business Profile

Liberty Ammunition	
Location: Bradenton, FL	Related Industry: Firearms & Ammunition Manufacturing
Revenue: \$4.4M	Employees: 20
Phone: +1 941-567-6178	Website: libertyammunition.com
Project/Company Description: Liberty Ammunition, Inc. is a manufacturer of lead-free and clear ballistic products for law enforcement and military agencies. Its products include T3 standard rifle ammunition, specialty sniper and combat rounds, as well Halo-Point handgun rounds. The company recently customized its patents to provide the gaming industry with higher performing ballistics. These improvements have also allowed the company to secure additional patents with the military over the last five years. Since then, it has rolled out its personal defense ammunition product line to the commercial market. The company is looking to locate a sales office/manufacturing facility and is interested in the Midwest though, the company may consider locating in other regions. The facility would be approximately 10,000 SF and would require ground access to a main road or highway, as it would store explosive ordnance and would need to be able to transport it safely.	

Table C12. MMC Armory Business Profile

MMC Armory	
Location: Mark, IL	Related Industry: Firearms & Ammunition Manufacturing
Revenue: \$40M	Employees: 300
Phone: +1 815-339-2226	Website: mmcarmory.com
Project/Company Description: MMC Armory specializes in production of assault rifles and parts. MMC Armory product lines include MA15 assault rifles and components and has a history as a US Government contractor. The company is interested in discussing opportunities in the Midwest, specifically with regards to a small assembly facility. However, MMC may consider other regions as it has been in discussion with several other economic development organizations around the country to evaluate best choices.	

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Table C13. Daniel Defense Business Profile

Daniel Defense	
Location: Ellabell, GA	Related Industry: Firearms & Ammunition Manufacturing
Revenue: \$2.1M	Employees: 10
Phone: +1 912-851-3248	Website: danieldefense.com
Project/Company Description: Daniel Defense is headquartered in Black Creek, GA with other operations in Ridgeland, SC. The company is engaged in the production of rifles and firearms accessories. Its products include rail systems, vertical grips, barrels, mounts, sights, rail tools, and components.	

Table C14. Sonovision Canada Business Profile

Sonovision Canada	
Location: Ottawa, Canada	Related Industry: Back Office Services
Revenue: \$15M	Employees: 110
Phone: +1 613-234-4849	Website: sonovisioncanada.com
Project/Company Description: A branch of the France-based Sonovision Group, Sonovision Canada provides technical documentation services to North American clients in the aerospace, military, and commercial sectors. The US is an important market for the company, and it wishes to continue growing in that market with current offices in Alabama and Arizona. The Mobile, Alabama, office location was chosen based on its proximity to Airbus, as the company's expansion strategy is to locate near prominent aerospace companies. The company is considering setting up a new office that would handle the creation of technical documents for local customers, including repair manuals for the aerospace industry. The number of staff needed in a new office will depend on the number of clients or opportunities in the region, but a new facility could expect to employ around 1-10 staff. The company is also looking to grow through acquisitions in the US in the coming years. If Uinta and South Lincoln Counties are successful at attracting aerospace manufacturers, Sonovision Canada could become a target of business attraction efforts due to the company's expansion strategy.	

Table C15. FIS Business Profile

FIS	
Location: Jacksonville, FL	Industry: Back Office Services
Revenue: 9.1B	Employees: 53,000
Phone: +1 888-323-0310	Website: fisglobal.com
Project/Company Description: FIS is a global leader in financial services technology, with a focus on retail and institutional banking, payments, asset and wealth management, risk and compliance, and outsourcing solutions. FIS serves clients in over 130 countries and employs approximately 53,000 people worldwide. FIS is a Fortune 500 company providing software services and outsourcing of the technology in the financial industry.	

Table C16. The Hagadone Corporation Business Profile

The Hagadone Corporation	
Location: Coeur D'Alene, Idaho	Industry: Boutique Hotel
Revenue: \$347.0M	Employees: 2,000
Phone: +1 208-664-7206	Website: hagadone.com
Project/Company Description: Founded in 1966, The Hagadone Corporation is headquartered in Coeur D'Alene, ID. The company functions in the publishing, newspaper, and hospitality industries. Its hospitality business operates restaurants, as well as offers lodging, golf, spa, and conventions facilities. Hagadone Corporation could be contacted to operate a boutique hotel in the Uinta County and South Lincoln region as it already has a significant presence in the northwest. The company employs 2,000 people.	

Appendix D: Full List of Business Recruitment Conferences & Events

Table D1. Business Recruitment Conferences & Events

Organization	Conference	Location	Dates	Registration ⁵⁷	Priority
Industrial Asset Management Council (IAMC)	<u>Spring 2019 IAMC Professional Forum</u>	Santa Barbara, CA	May 4-8, 2019	\$2,145	Medium Industry Targets: - All Mfg.
Shared Services & Outsourcing Network	<u>HR Shared Services & Outsourcing Summit</u>	Chicago, IL	May 15 - 17, 2019	\$589 - \$2,595	Low Industry Targets: - Back Office Services
Boutique & Lifestyle Hotel Summit	2019 Boutique Hotel Summit	London, England	May 22, 2019	TBD	Low: Boutique Hotels
Area Development	<u>Consultants Forum 27</u>	Charlotte, NC	June 3-5, 2019	\$1,795	Medium
International Economic Development Council (IEDC)	<u>2019 Economic Future Forum</u>	Salt Lake City, UT	June 9-11, 2019	\$560 (IEDC Member and registration by April 12)	High
The American Society of Mechanical Engineers	ASME Turbo Expo	Phoenix, AZ	June 17-21, 2019	\$650-\$850	High Industry Targets: - Wind Turbine Mfg. - Aerospace Parts Mfg.
International Paris Air Show	<u>International Paris Air Show</u>	Paris, FR	June 17-23, 2019	Various	Medium
ENERCOM	<u>The Oil & Gas Conference</u>	Denver, CO	August 11-14, 2019	\$500	High Industry Targets: - Mining Machinery and Oil & Gas Machinery Mfg.
Site Selectors Guild	<u>2019 Fall Forum</u>	Dallas, TX	September 9-11, 2019	Approx. \$2,000	High
International Economic Development Council (IEDC)	<u>2019 Annual Conference</u>	Indianapolis, IN	October 13-16, 2019	\$775 (IEDC Member and registration by August 9)	High

⁵⁷ Registration price is assuming one registration.

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Organization	Conference	Location	Dates	Registration ⁵⁸	Priority
Society of Industrial and Office Realtors (SIOR)	<u>2019 Fall World Conference</u>	Portland, OR	October 17-19, 2019	Approx. \$1,210	High
World Crypto Conference (WCC)	<u>World Crypto Conference 2018</u>	Las Vegas, NV	October 29-31, 2019	TBD	High Industry Targets: - Blockchain Processing Facilities
WINDExchange	<u>American Wind Energy Association WINDPOWER Conference & Exhibition</u>	Houston, TX	May 20- 23, 2019	\$695 (non-member pricing)	Medium
State Science & Technology Institute (SSTI)	<u>2019 SSTI Annual Conference</u>	TBD	TBD, likely December, 2019	Approx. \$775	Low
National Shooting Sports Foundation (NSSF)	<u>Shot Show</u>	TBD	TBD, likely January, 2020	TBD	High
Society for Mining, Metallurgy & Exploration (SME)	<u>Smart Mining (SME Annual Conference)</u>	TBD	TBD, likely February, 2020	Approx. \$745	High: Industry Targets: - Mining Machinery and Oil & Gas Machinery Mfg.
State of Utah	<u>Utah Economic Summit</u>	Salt Lake City, UT	May 17, 2019	\$180	Medium: Industry Targets: Back Office Services & Aerospace Parts Mfg.
Generis	<u>American Aerospace & Defense Summit</u>	Glendale, AZ	December 11-12, 2019	TBD	Low: Aerospace Parts Mfg.
Wyoming Economic Development Association (WEDA)	WEDA Winter Conference	Cheyenne, WY	TBD, likely February, 2020	TBD	High

⁵⁸ Registration price is assuming one registration.

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Organization	Conference	Location	Dates	Registration ⁵⁹	Priority
Mining Tech	<u>Mining Investment North America</u>	Toronto, ON Canada	June 26-27, 2019	\$1,695	Low: Industry Targets: Mining Equipment Mfg.
South by Southwest (SXSW)	<u>2020 SXSW</u>	Austin, TX	TBD, likely March, 2020	Approx. \$1,150 (premium)	Low
HANNOVER MESSE	<u>2020 HANNOVER MESSE</u>	Hannover, Germany	TBD, Likely April, 2019	Approx. \$105 €	Medium Industry Targets: - All Mfg.
International Business Innovation Association (InBIA)	<u>2020: 34th International Conference on Business Incubation</u>	TBD	TBD, likely April, 2020	Approx. \$1,195	Low

⁵⁹ Registration price is assuming one registration.

Appendix E: Data Sources & Glossary of Key Terms

Key Terms

Data Sources

All data and analysis for this report are directly or indirectly derived from information provided by either the U.S. Bureau of the Census or U.S. Bureau of Labor Statistics:

- Economic Modeling Specialists International (EMSI), 2018.3 Class of Worker data (based on the U.S. Quarterly Census of Employment and Wages) and general demographic estimates
- U.S. Census American Community Survey 2012-2016 Estimates
- U.S. Census OnTheMap

Competitive Effect

Used in conjunction with "Shift-Share Analysis" techniques⁶⁰, *The Competitive Effect* metric seeks to isolate the influence of local dynamics from the influence of non-local factors on industries' employment growth or decline. A positive number indicates that the study area experienced more growth within a particular industry than would have been expected from non-local trends; the magnitude of *The Competitive Effect* indicates the strength of the purely local influence on the industry's employment change.

Location Quotient

Location Quotient (LQ) measures the relative importance of an industry's employment to a particular region, and uses the straightforward formula:

$$LQ = [\% \text{ of total local employment} / \% \text{ of total national employment}]$$

Location Quotients are one of the most common and important indicators of local economic characteristics; LQ's greater than 1.25 are typically considered to be the threshold for identifying an industry as especially relatively strong.

NAICS Codes (The North American Industry Classification System)

NAICS is the standard used by Federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy. The numbering structure is hierarchical in nature, meaning that fewer digits are broader in their meaning, while longer (up to six) digits provide greater specificity.

SOC Codes (Standard Occupational Classification)

The 2000 Standard Occupational Classification (SOC) System was developed in response to a growing need for a universal occupational classification system. Such a classification system allows government agencies

⁶⁰ Shift share is a standard regional analysis method that attempts to determine how much of regional job growth can be attributed to national trends and how much is due to unique regional factors. Shift share helps answer why employment is growing or declining in a regional industry, cluster, or occupation.

and private industry to produce comparable data. Users of occupational data include government program managers, industrial and labor relations practitioners, students considering career training, job seekers, vocational training schools, and employers wishing to set salary scales or locate a new plant. It is used by federal agencies collecting occupational data, providing a standard means to compare such data across agencies. It is designed to cover all occupations in which work is performed for pay or profit, reflecting the current occupational structure in the United States.

As with NAICS, the SOC coding structure is hierarchical, with fewer digits provide broad data (occupational categories), while larger provide more specific data (specific professions).

Industry Sector Definitions

The following 4-digit industry classifications are those used in Chapter 7. Research & Inventories Analysis.

Table E1. Healthcare Industries

NAICS	Description
6211	Offices of Physicians
6212	Offices of Dentists
6213	Offices of Other Health Practitioners
6214	Outpatient Care Centers
6215	Medical and Diagnostic Laboratories
6216	Home Health Care Services
6219	Other Ambulatory Health Care Services
6221	General Medical and Surgical Hospitals
6222	Psychiatric and Substance Abuse Hospitals
6223	Specialty (except Psychiatric and Substance Abuse) Hospitals
6231	Nursing Care Facilities (Skilled Nursing Facilities)
6232	Residential Intellectual and Developmental Disability, Mental Health, and Substance Abuse Facilities
6233	Continuing Care Retirement Communities and Assisted Living Facilities for the Elderly
6239	Other Residential Care Facilities
6241	Individual and Family Services
6242	Community Food and Housing, and Emergency and Other Relief Services
6243	Vocational Rehabilitation Services
6244	Child Day Care Services

Table E2. Manufacturing Industries

NAICS	Description
3111	Animal Food Manufacturing
3112	Grain and Oilseed Milling
3113	Sugar and Confectionery Product Manufacturing
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing
3115	Dairy Product Manufacturing
3116	Animal Slaughtering and Processing
3117	Seafood Product Preparation and Packaging
3118	Bakeries and Tortilla Manufacturing
3119	Other Food Manufacturing
3121	Beverage Manufacturing
3122	Tobacco Manufacturing
3131	Fiber, Yarn, and Thread Mills
3132	Fabric Mills
3133	Textile and Fabric Finishing and Fabric Coating Mills
3141	Textile Furnishings Mills
3149	Other Textile Product Mills
3151	Apparel Knitting Mills
3152	Cut and Sew Apparel Manufacturing
3159	Apparel Accessories and Other Apparel Manufacturing
3161	Leather and Hide Tanning and Finishing
3162	Footwear Manufacturing
3169	Other Leather and Allied Product Manufacturing
3211	Sawmills and Wood Preservation
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing
3219	Other Wood Product Manufacturing
3221	Pulp, Paper, and Paperboard Mills
3222	Converted Paper Product Manufacturing
3231	Printing and Related Support Activities
3241	Petroleum and Coal Products Manufacturing
3251	Basic Chemical Manufacturing
3252	Resin, Synthetic Rubber, and Artificial and Synthetic Fibers and Filaments Manufacturing
3253	Pesticide, Fertilizer, and Other Agricultural Chemical Manufacturing
3254	Pharmaceutical and Medicine Manufacturing
3255	Paint, Coating, and Adhesive Manufacturing
3256	Soap, Cleaning Compound, and Toilet Preparation Manufacturing
3259	Other Chemical Product and Preparation Manufacturing
3261	Plastics Product Manufacturing
3262	Rubber Product Manufacturing
3271	Clay Product and Refractory Manufacturing
3272	Glass and Glass Product Manufacturing

NAICS	Description
3273	Cement and Concrete Product Manufacturing
3274	Lime and Gypsum Product Manufacturing
3279	Other Nonmetallic Mineral Product Manufacturing
3311	Iron and Steel Mills and Ferroalloy Manufacturing
3312	Steel Product Manufacturing from Purchased Steel
3313	Alumina and Aluminum Production and Processing
3314	Nonferrous Metal (except Aluminum) Production and Processing
3315	Foundries
3321	Forging and Stamping
3322	Cutlery and Handtool Manufacturing
3323	Architectural and Structural Metals Manufacturing
3324	Boiler, Tank, and Shipping Container Manufacturing
3325	Hardware Manufacturing
3326	Spring and Wire Product Manufacturing
3327	Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing
3328	Coating, Engraving, Heat Treating, and Allied Activities
3329	Other Fabricated Metal Product Manufacturing

Table E3: Agriculture Industries

NAICS	Description
1110	Crop Production
1120	Animal Production and Aquaculture
1131	Timber Tract Operations
1132	Forest Nurseries and Gathering of Forest Products
1133	Logging
1141	Fishing
1142	Hunting and Trapping
1151	Support Activities for Crop Production
1152	Support Activities for Animal Production
1153	Support Activities for Forestry

Table E4. Tourism Industries

NAICS	Description
4871	Scenic and Sightseeing Transportation, Land
4872	Scenic and Sightseeing Transportation, Water
4879	Scenic and Sightseeing Transportation, Other
5615	Travel Arrangement and Reservation Services
5619	Other Support Services
7111	Performing Arts Companies
7112	Spectator Sports
7113	Promoters of Performing Arts, Sports, and Similar Events
7114	Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures
7115	Independent Artists, Writers, and Performers
7121	Museums, Historical Sites, and Similar Institutions
7131	Amusement Parks and Arcades
7132	Gambling Industries
7139	Other Amusement and Recreation Industries
7211	Traveler Accommodation
7212	RV (Recreational Vehicle) Parks and Recreational Camps
7213	Rooming and Boarding Houses
7223	Special Food Services
7224	Drinking Places (Alcoholic Beverages)
7225	Restaurants and Other Eating Places

Table E5. Energy Industries

NAICS	Description
2111	Oil and Gas Extraction
2121	Coal Mining
2131	Support Activities for Mining
2123	Nonmetallic Mineral Mining and Quarrying
2122	Metal Ore Mining

Table E6. Information Technology (IT) Industries

NAICS	Description
5112	Software Publishers
5182	Data Processing, Hosting, and Related Services
5415	Computer Systems Design and Related Services