

Mohave County Target Industry Analysis



Mohave County

Target Industry Analysis

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1. EXECUTIVE SUMMARY

A Target Industry Analysis provides the strategic framework for public policy by identifying those industries that share the demand for a similarly educated labor pool, supply chain or customer base. It's a method utilized by economic development organizations to understand the market and align their limited resources in order to more effectively create jobs, brand, and market their community and region.

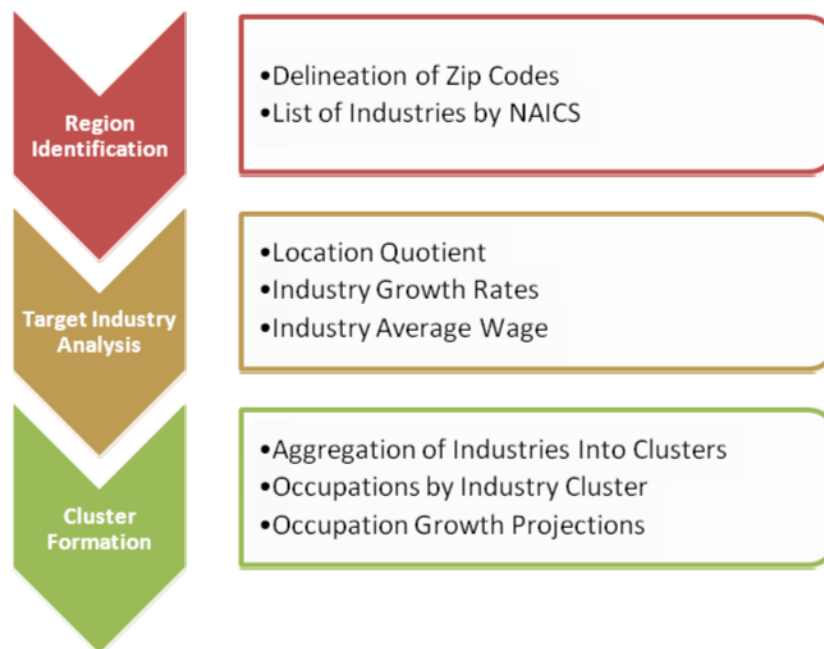
This targeted industry analysis focuses on the southern portion of Mohave County, where the majority of the population and economic activity is concentrated. The three distinct regions analyzed for this study included Bullhead City/Laughlin, Kingman, and Lake Havasu City.

ABOUT THE DATA

Most of the data utilized in this analysis comes from the U.S. Bureau of Economic Analysis, U.S. Bureau of Labor Statistics, and IMPLAN. The data year for employment, industry wages, and occupational wages is 2009. Industry growth rates are measured from 2005 to 2009 and occupational growth projections are for 2008 to 2018, which is the most current data available. Industries were categorized by the North American Industrial Classification System (NAICS) used in the United States, Canada, and Mexico.

METHODOLOGY

There are several steps utilized in the analysis to identify industry targets and ultimately the aggregation of industries into cluster families. After defining the study area, an analysis of existing employment is undertaken to uncover the concentration of employment by industry, its growth rate and the average industry wage based on payroll.



Industry clusters were initially centered on key industries and industry sectors. The purpose of this task was to group like industries based on statistical evidence and common regional industry knowledge to build a cluster. Industry clusters are defined as networks of firms within a region that benefit from business-to-business relationships and share common markets, labor pools, technologies, supplier industries, and institutional support services such as educational institutions or other specialized education and training programs.

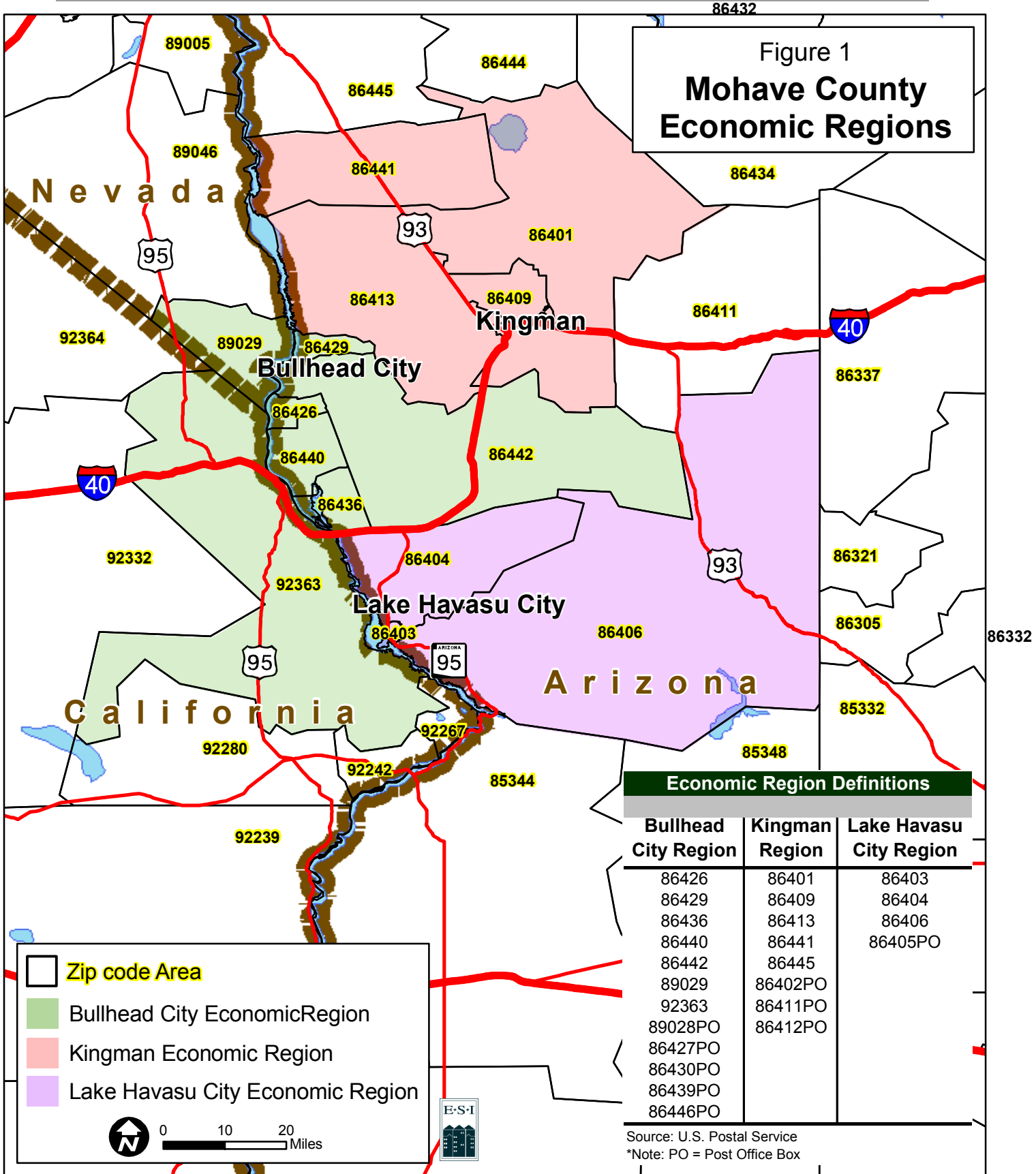
Defined Economic Regions

The Mohave County economic regions were delineated utilizing a combination of factors to determine the scope of each area. These factors included employment center concentrations, development patterns, trade relationships, transportation networks, participating community feedback, and data availability. The three economic regions in Mohave County revolve around the communities of Bullhead City, Kingman, and Lake Havasu City, and are named as such. The delineation of the three economic regions is depicted in Figure 1, and the composition of zip codes are noted in Table 1.

Table 1 – Economic Region Definitions by Zip code

Bullhead City	Kingman	Lake Havasu City
86426	86401	86403
86429	86409	86404
86436	86413	86406
86440	86441	86405PO
86442	86445	
89029	86402PO	
92363	86411PO	
89028PO	86412PO	
86427PO		
86430PO		
86439PO		
86446PO		

Source: ESI Corp; U.S. Postal Service
 Note: PO = Post Office Box



Economic Region Definitions

Bullhead City Region	Kingman Region	Lake Havasu City Region
86426	86401	86403
86429	86409	86404
86436	86413	86406
86440	86441	86405PO
86442	86445	
89029	86402PO	
92363	86411PO	
89028PO	86412PO	
86427PO		
86430PO		
86439PO		
86446PO		

Source: U.S. Postal Service
*Note: PO = Post Office Box

Source: ESRI 2008; TIGER 2010; ESI Corp 2011

Bullhead City Economic Region

The Bullhead City Economic Region is made up of twelve zip codes from Mohave County, Arizona, Clark County, Nevada, and San Bernardino County, California. This region encompasses 2,591 square miles and contains 74,560 people in 2009. These statistics translate to 28.8 persons per square mile, whom compose a total of 29,663 households, with a household size of 2.5. Approximately 58 percent of these households earn between \$15,000 to \$50,000. Total employment in this economic region is 28,764 persons with an average income of \$43,278. The major employers in the Bullhead City Economic Region include Western Arizona Regional Medical Center, Silver Ridge Village, and Mohave Community College.

This economic region is primarily reliant on the tourism industry, and specifically the entertainment and gaming industries located in Laughlin, Nevada. Proximity to Lake Mohave and Lake Havasu provides a significant recreational industry, while the regional medical center is the core of this region’s healthcare industry. The Bullhead City Economic Region is in need of diversification, and should seek to support the more diverse economies of its neighbors.

Industry clusters that are mature in this region include Arts and Entertainment and Healthcare. The Bullhead Regional Economic Development Authority has also identified other industry targets that they would like to foster in their region to aid in the diversification of their economy. Figure 2 provides a graphical portrayal of the existing and targeted industries and clusters.

Table 2 – Bullhead City Economic Region

Cluster	Region Average Cluster Wage	% of Total Region Employment
Arts and Entertainment	\$32,775	55.2%
Healthcare Services	\$50,856	8.4%

The Arts and Entertainment Cluster in the Bullhead City Economic Region makes up over fifty-five percent of the total employment in that region, however the average wage in this cluster is about \$10,000 less than the region average total wage, which is \$43,278. The Healthcare Services Cluster only makes up about eight percent of the region’s employment; on the other hand, the cluster’s average wage is approximately \$7,000 more than the Bullhead City Economic Region as a whole.

Kingman Economic Region

The Kingman Economic Region is made up of eight zip codes that encompass 2,133 square miles, which contained 61,735 people in 2009. This region has the highest population density of the three geographies detailed in this report at 28.9 persons per square mile, whom compose a total of 24,063 households, with a household size of 2.6. Approximately 52 percent of these households earn between \$15,000 to \$50,000. Total employment in this economic region is 21,334 persons with an average income of \$40,027. The major employers in the Kingman Economic Region include Kingman Regional Medical Center, American Woodmark Corp., IWX Motor Freight, and McKee Foods.

This economic region contains the most diversity of the three, and hosts significant concentrations of manufacturing, transportation and logistics, and aviation industries, in addition to, healthcare and tourism industries. The Kingman Economic Region must take advantage of its existing critical mass of industries, as well as, continue to develop their multimodal transportation options. As ports on the west coast continue to experience more unloading delays, the freight hauling and logistics industries will be looking for alternatives further and further inland, since unloading delays cause massive monetary losses for these industries. Attracting industries that focus on alternative energy component manufacturing (as opposed to generation) such as solar cells, is also worthy of some attention. Figure 3 provides a graphical portrayal of the Kingman industry clusters.

Table 3 – Kingman Economic Region

Cluster	Region Average Cluster Wage	% of Total Region Employment
Arts and Entertainment	\$28,691	28.2%
Aviation	\$68,007	2.0%
Energy	\$78,016	0.8%
Healthcare Services	\$50,850	13.8%
Manufacturing	\$55,238	5.9%
Transportation and Logistics	\$75,406	3.7%

The Kingman Economic Region contains a high percentage of Arts and Entertainment, Healthcare Services, and Manufacturing, making up 28.2 percent, 13.8 percent, and 5.9 percent of the region’s total employment, respectively. The average cluster wages of Healthcare Services and Manufacturing, at \$50,850 and \$55,238, are well in excess of the region’s total average wage of \$40,027. The Arts and Entertainment Cluster, on average, pays about \$11,000 less than the total region average wage.

Lake Havasu City Economic Region

The Lake Havasu City Economic Region is made up of four zip codes that encompass 2,396 square miles, which contained 56,618 people in 2009. The least dense of the three geographies, this region hosts 23.6 persons per square mile, whom compose a total of 23,232 households, with a household size of 2.4. Approximately 55 percent of these households earn between \$15,000 to \$50,000. Total employment in this economic region is 19,462 persons with an average income of \$37,891. The major employers in the Lake Havasu City Economic Region include Havasu Samaritan Regional Hospital, Mohave Community College, Sterlite Corp., and Wal-Mart.

This economic region contains several cluster families and is more diversified than its neighbor to the north, Bullhead City. With the prospect of ASU-Havasú coming on line in the Fall of 2012, there exists the opportunity to align higher education curriculum with the industry clusters that are deemed the most significant for Lake Havasu City, which could include information technology and healthcare. The Lake Havasu Economic Region must build on its unique assets in the region as a hub for motorsports and information technology industries, as well as, nurture its well established tourism industries. Figure 4 provides a graphical portrayal of the Lake Havasu City industry clusters.

Table 4 – Lake Havasu City Economic Region		
Cluster	Region Average Cluster Wage	% of Total Region Employment
Arts and Entertainment	\$26,989	30.7%
Healthcare Services	\$49,184	13.1%
Information Technology	\$40,745	1.1%
Manufacturing	\$49,647	4.4%
Motorsports	\$41,048	4.9%

The top three clusters in Lake Havasu City Economic Region include Arts and Entertainment, Healthcare Services, and Motorsports, which contain 30.7 percent, 13.1 percent, and 4.9 percent of total employment, respectively. The Healthcare Services Cluster, at \$49,184 pays about \$11,000 more than the total average wage for this region, whereas, the Motorsports Cluster pays about \$3,000 more. In contrast, the Arts and Entertainment Cluster in this Region, at \$26,989, pays on average approximately \$10,000 less than the total average wage of \$37,891, in this region.

Mohave County

The economic region target industry analysis process has also determined clusters for the unincorporated County that the County Economic Development Department can focus on. These include a smorgasbord of the strong industry clusters located in the identified economic regions and consist of industries engaged in tourism, healthcare, transportation and logistics, manufacturing, energy production, and information technology. Figure 5 provides a graphical portrayal of the unincorporated county industry clusters.

Mohave County is the second largest county in Arizona and encompasses 13,471 square miles, which contains 194,825 people. These figures translate to 14.5 persons per square mile, whom compose a total of 75,694 households, with a household size of 2.6. Approximately 55 percent of these households earn between \$15,000 to \$50,000. Total employment in the County is 58,704 persons with an average income of \$39,133. Table 5 shows target cluster statistics for Mohave County as a whole (including area cities), instead of the unincorporated county, due to the inability to segregate data.

Table 5 – Mohave County		
Cluster	County Average Cluster Wage	% of Total Region Employment
Arts and Entertainment	\$27,724	30.0%
Energy	\$78,016	0.5%
Healthcare Services	\$51,327	13.4%
Information Technology	\$40,745	0.8%
Manufacturing	\$50,630	3.9%
Mining	\$71,218	0.5%
Transportation & Logistics	\$67,623	2.6%

Mohave County, as a whole, contains a high percentage of Arts and Entertainment, Healthcare Services, and Manufacturing, making up 30.0 percent, 13.4 percent, and 3.9 percent of the County’s total employment, respectively. The average cluster wages of Healthcare Services and Manufacturing, at \$51,327 and \$50,630, are more than \$10,000 higher than the County’s total average wage of \$39,133. The Arts and Entertainment Cluster, on average, pays about \$11,000 less than the County’s total average wage.

Figure 2 - Bullhead City Economic Region

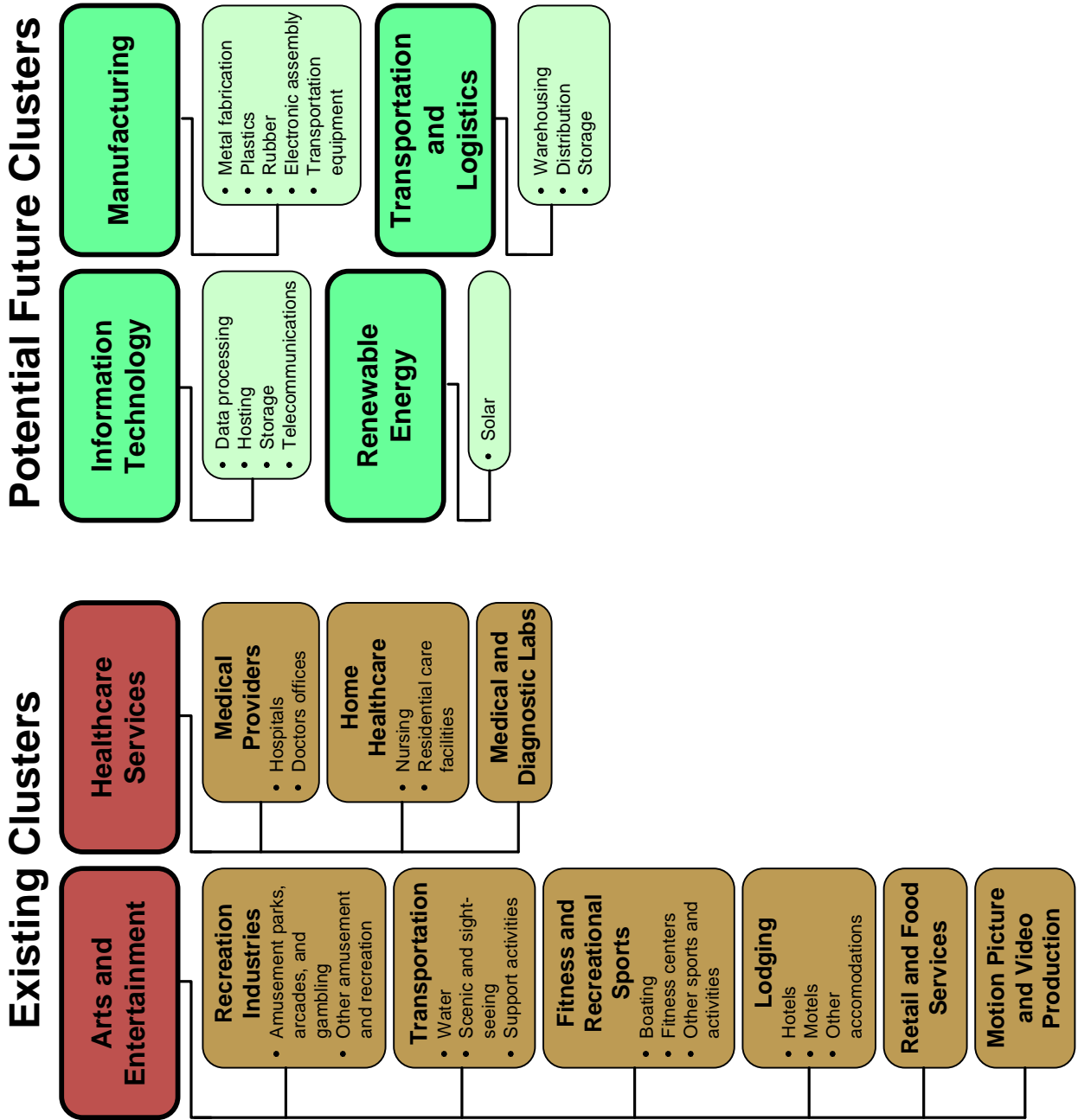


Figure 3 - Kingman Economic Region Existing Industry Clusters

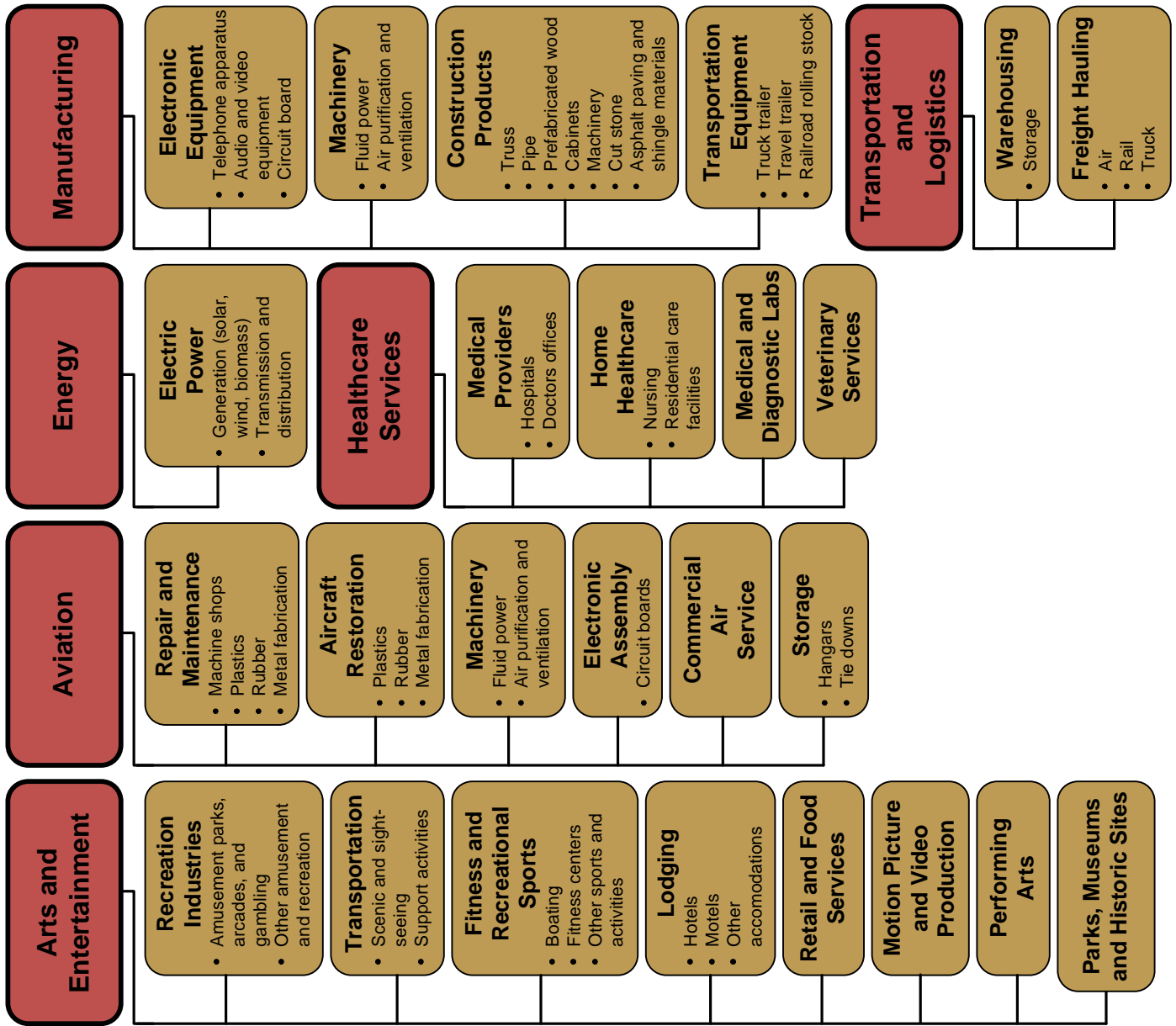
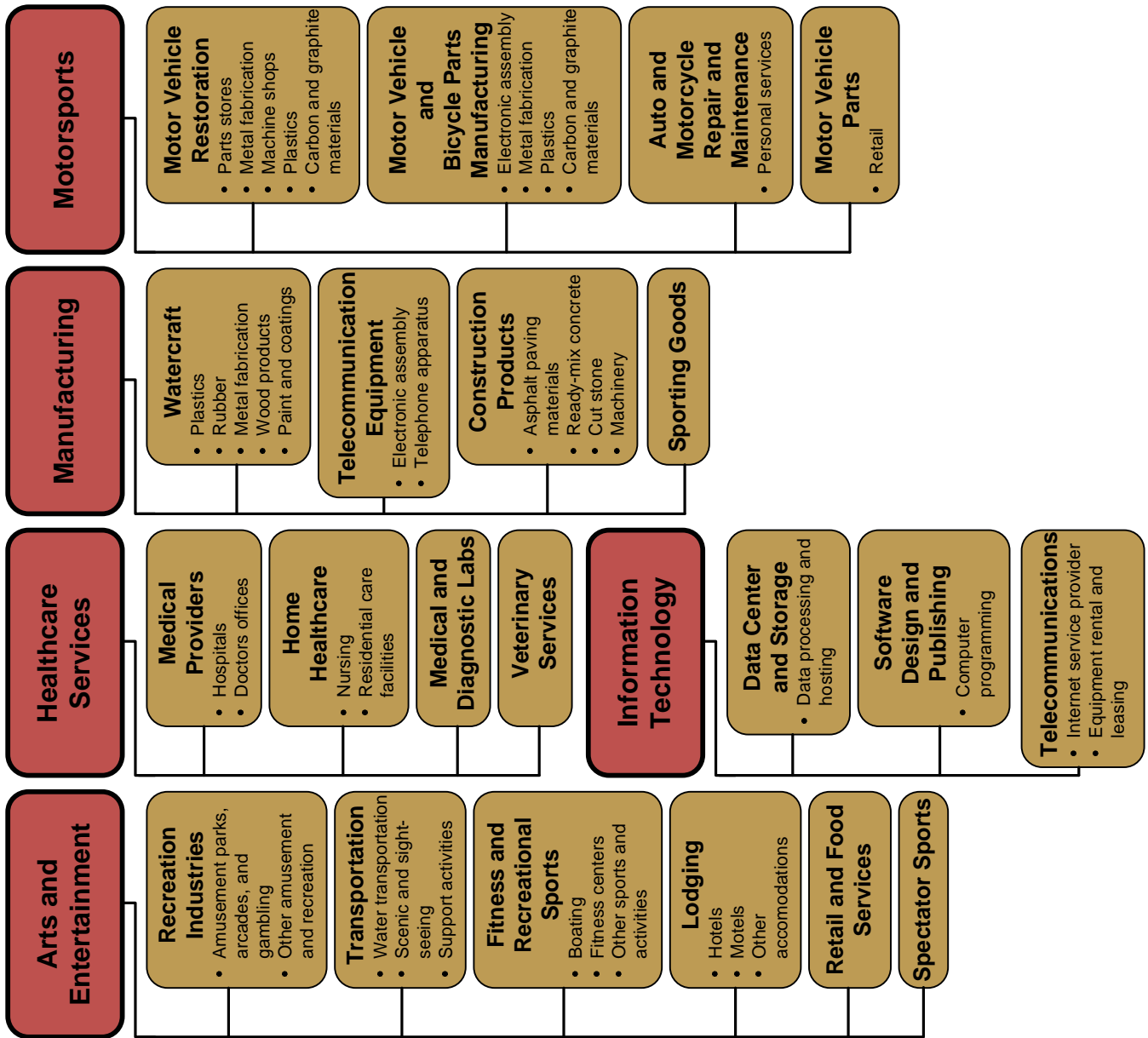
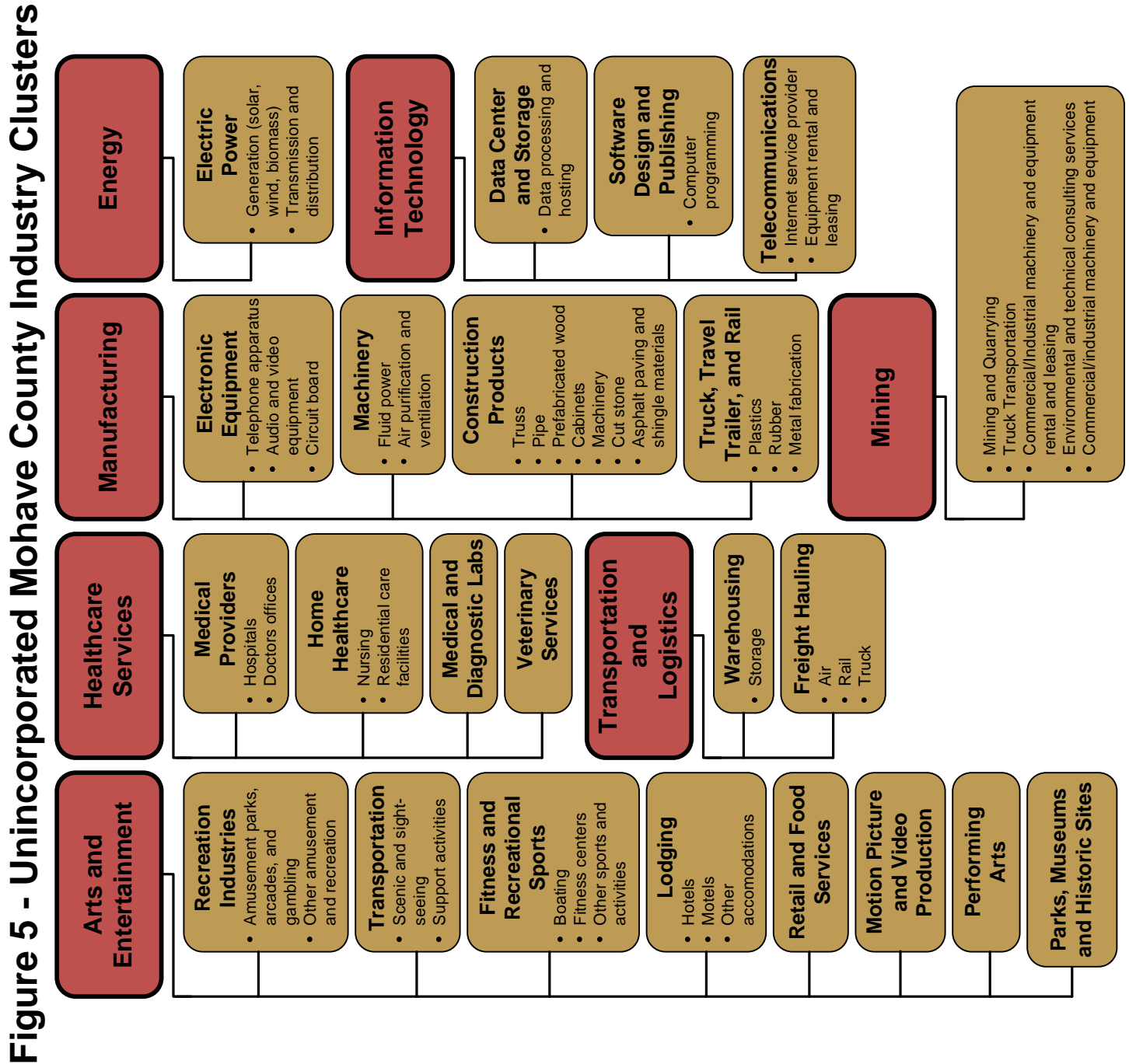


Figure 4 - Lake Havasu City Economic Region Industry Clusters





FINAL INDUSTRY TARGETS

Based on the industry cluster analysis, the representatives from the three economic regions and the County identified key industry targets within each cluster that would be the focus of their economic development efforts. The following tables for each region (tables 6 through 9) show the cluster hierarchy and the selected industry target denoted by an "X" in the column labeled "Target." The industries that were selected for each economic region were based on a combination of the strength of the location quotient, employment growth rate and annual average wage. The criteria selected for the ratings in the associated columns in the tables are noted below.

Location Quotient	Low	Less than .50
	Moderate	.51 - 1.00
	Strong	1.00 - 3.00
	Very Strong	Greater than 3.00
Growth Rate	Negative	Less than 0
	Slow	0 - 2%
	Moderate	2% - 5%
	Fast	Greater than 5%
Wages	Low	Less than \$35,000
	Moderate	\$35,000 - \$45,000
	Strong	\$45,000 - \$60,000
	Very Strong	Greater than \$60,000

Table 6 - Bullhead City Economic Region Industry Targets

NAICS	Description	Bullhead City Economic Region LQ	Mohave County Annualized Growth (2005-2009)	Mohave County Average Annual Wage	Target
Arts and Entertainment					
441	Retail - Motor vehicle and parts	moderate	negative	strong	
442	Retail - Furniture and home furnishings	low	negative	moderate	X
443	Retail - Electronics and appliances	low	negative	low	X
444	Retail - Building material and garden supply	strong	negative	low	
445	Retail - Food and beverage	moderate	negative	moderate	
446	Retail - Health and personal care	moderate	fast	moderate	
447	Retail - Gasoline stations	strong	negative	strong	
448	Retail - Clothing and clothing accessories	strong	negative	low	
451	Retail - Sporting goods, hobby, book and music	moderate	negative	low	
452	Retail - General merchandise	strong	moderate	low	
453	Retail - Miscellaneous	strong	negative	low	
454	Retail - Nonstore	low	negative	low	
483	Water transportation	very strong	slow	low	
487, 488	Scenic and sightseeing transportation and support activities for transportation	moderate	negative	moderate	
5121	Motion picture and video industries	strong	fast	low	X
5151	Radio and television broadcasting	strong	negative	strong	
5615	Travel arrangement and reservation services	low	fast	low	
7111	Performing arts companies	low	fast	low	
7112	Spectator sports	low	slow	low	
7113-4	Promoters of performing arts and sports and agents for public figures	low	NEW	low	
7115	Independent artists, writers, and performers	low	negative	very strong	
712	Museums, historical sites, zoos, and parks	low	slow	moderate	
71394	Fitness and recreational sports centers	moderate	negative	low	
71395	Bowling centers	low	negative	low	

Table 6 - Bullhead City Economic Region Industry Targets

NAICS	Description	Bullhead City Economic Region LQ	Mohave County Annualized Growth (2005-2009)	Mohave County Average Annual Wage	Target
Arts and Entertainment (Continued)					
7131-2	Amusement parks, arcades, and gambling industries	very strong	fast	low	
71391-3,	Other amusement and recreation industries	strong	negative	low	
71399					
72111-2	Hotels and motels, including casino hotels	very strong	negative	low	
72119,	Other accommodations	very strong	negative	low	
7212-3					
722	Food services and drinking places	strong	negative	low	
Healthcare Services					
339116	Dental laboratories	low	negative	strong	X
6211-3	Offices of physicians, dentists, and other health practitioners	moderate	moderate	very strong	
6216	Home health care services	low	fast	moderate	X
6214-5,	Medical and diagnostic labs and outpatient and other	moderate	fast	very strong	X
6219	ambulatory care services				
622	Hospitals	strong	fast	very strong	X
623	Nursing and residential care facilities	strong	negative	low	X
Manufacturing					
Plastics and Rubber Products Manufacturing					
326122	Plastics pipe and pipe fitting manufacturing	low	slow	strong	
32614	Polystyrene foam product manufacturing	low	NEW	strong	
32615	Urethane and other foam product (except polystyrene) manufacturing	low	NEW	low	
32619	Other plastics product manufacturing	low	fast	strong	X
32621	Tire manufacturing	low	NEW	strong	

Table 6 - Bullhead City Economic Region Industry Targets						
NAICS	Description	Bullhead City Economic Region LQ	Mohave County Annualized Growth (2005-2009)	Mohave County Average Annual Wage	Target	
Manufacturing (Continued)						
Computer and Electronic Equipment Manufacturing						
33421	Telephone apparatus manufacturing	low	fast	very strong	X	
3343	Audio and video equipment manufacturing	low	fast	strong	X	
334418	Printed circuit assembly (electronic assembly) manufacturing	low	NEW	very strong		
334510	Electromedical and electrotherapeutic apparatus manufacturing	low	fast	very strong	X	
335991	Carbon and graphite product manufacturing	strong	fast	moderate	X	
Fabricated Metal Product Manufacturing						
332111-2,	All other forging, stamping, and sintering	moderate	NEW	strong	X	
332117						
33231	Plate work and fabricated structural product manufacturing	low	NEW	moderate		
33232	Ornamental and architectural metal products manufacturing	low	negative	moderate		
3325	Hardware manufacturing	low	fast	very strong	X	
33271	Machine shops	low	fast	very strong	X	
3328	Coating, engraving, heat treating and allied activities	low	NEW	strong		
332996	Fabricated pipe and pipe fitting manufacturing	low	negative	strong		
332997-9	Other fabricated metal manufacturing	low	negative	strong		
Transportation Equipment Manufacturing						
336212	Truck trailer manufacturing	low	negative	low		
336214	Travel trailer and camper manufacturing	low	NEW	low		
3363	Motor vehicle parts manufacturing	low	negative	moderate		
Transportation Equipment Manufacturing (Continued)						
336413	Other aircraft parts and auxiliary equipment manufacturing	low	negative	very strong		
3365	Railroad rolling stock manufacturing	strong	slow	strong		
336991	Motorcycle, bicycle, and parts manufacturing	low	NEW	low	X	
336999	All other transportation equipment manufacturing	low	NEW	low	X	

Table 6 - Bullhead City Economic Region Industry Targets

NAICS	Description	Bullhead City Economic Region LQ	Mohave County Annualized Growth (2005-2009)	Mohave County Average Annual Wage	Target
Transportation and Logistics					
493	Warehousing and storage	low	moderate	low	X
Information Technology					
5151	Radio and television broadcasting	strong	negative	strong	
51913	Internet publishing and broadcasting	strong	slow	low	
517	Telecommunications	low	negative	strong	X
518	Data processing, hosting, and related services	low	fast	moderate	X
51911-2	Other information services	strong	slow	low	

Source: Bureau of Labor Statistics, Quarterly Census of Employment and Wages (QCEW); IMPLAN; ESI Corp

Table 7 - Kingman Economic Region Industry Targets

NAICS	Description	Kingman Economic Region LQ	Mohave County Annualized Growth (2005-2009)	Mohave County Average Annual Wage	Target
Arts and Entertainment					
441	Retail - Motor vehicle and parts	strong	negative	strong	
442	Retail - Furniture and home furnishings	low	negative	moderate	
443	Retail - Electronics and appliances	low	negative	low	
444	Retail - Building material and garden supply	strong	negative	low	
445	Retail - Food and beverage	strong	negative	moderate	
446	Retail - Health and personal care	moderate	fast	moderate	X
447	Retail - Gasoline stations	very strong	negative	strong	
448	Retail - Clothing and clothing accessories	moderate	negative	low	
451	Retail - Sporting goods, hobby, book and music	moderate	negative	low	
452	Retail - General merchandise	strong	moderate	low	
453	Retail - Miscellaneous	strong	negative	low	
454	Retail - Nonstore	strong	negative	low	
483	Water transportation	low	slow	low	
487, 488	Scenic and sightseeing transportation and support activities for transportation	strong	negative	moderate	X
5121	Motion picture and video industries	very strong	fast	low	X
5151	Radio and television broadcasting	low	negative	strong	
5615	Travel arrangement and reservation services	low	fast	low	
7111	Performing arts companies	strong	fast	low	X
7112	Spectator sports	low	slow	low	
7113-4	Promoters of performing arts and sports and agents for public figures	strong	NEW	low	
7115	Independent artists, writers, and performers	moderate	negative	very strong	
712	Museums, historical sites, zoos, and parks	strong	slow	moderate	X
71394	Fitness and recreational sports centers	low	negative	low	
71395	Bowling centers	very strong	negative	low	

Table 7 - Kingman Economic Region Industry Targets

NAICS	Description	Kingman Economic Region LQ	Mohave County Annualized Growth (2005-2009)	Mohave County Average Annual Wage	Target
Arts and Entertainment (Continued)					
7131-2	Amusement parks, arcades, and gambling industries	low	fast	low	
71391-3, 71399	Other amusement and recreation industries	low	negative	low	
72111-2	Hotels and motels, including casino hotels	strong	negative	low	X
72119, 7212-3	Other accommodations	strong	negative	low	
722	Food services and drinking places	strong	negative	low	
Healthcare Services					
339116	Dental laboratories	low	negative	strong	
54194	Veterinary services	strong	negative	low	
6211-3	Offices of physicians, dentists, and other health practitioners	strong	moderate	very strong	X
6216	Home health care services	low	fast	moderate	
6214-5, 6219	Medical and diagnostic labs and outpatient and other ambulatory care services	moderate	fast	very strong	X
622	Hospitals	very strong	fast	very strong	X
623	Nursing and residential care facilities	strong	negative	low	
Energy					
2211	Electric power generation, transmission, and distribution	strong	negative	very strong	
Manufacturing					
Misc. Manufacturing					
324121	Asphalt paving mixture and block manufacturing	very strong	fast	strong	X
324122	Asphalt shingle and coating materials manufacturing	very strong	negative	very strong	
339993, 339995, 339999	All other miscellaneous manufacturing	low	fast	moderate	

Table 7 - Kingman Economic Region Industry Targets

NAICS	Description	Kingman Economic Region LQ	Mohave County Annualized Growth (2005-2009)	Mohave County Average Annual Wage	Target
Manufacturing (Continued)					
Plastics and Rubber Products Manufacturing					
326122	Plastics pipe and pipe fitting manufacturing	very strong	slow	strong	X
32614	Polystyrene foam product manufacturing	strong	NEW	strong	X
32615	Urethane and other foam product (except polystyrene) manufacturing	low	NEW	low	
32619	Other plastics product manufacturing	strong	fast	strong	X
32621	Tire manufacturing	very strong	NEW	strong	X
Non-Metallic Mineral Product Manufacturing					
32733	Concrete pipe, brick, and block manufacturing	low	fast	strong	X
327991	Cut stone and stone product manufacturing	very strong	fast	moderate	X
Computer and Electronic Equipment Manufacturing					
33421	Telephone apparatus manufacturing	very strong	fast	very strong	X
3343	Audio and video equipment manufacturing	strong	fast	strong	X
334418	Printed circuit assembly (electronic assembly) manufacturing	very strong	NEW	very strong	X
Fabricated Metal Product Manufacturing					
332111-2,	All other forging, stamping, and sintering	very strong	NEW	strong	X
332117					
33231	Plate work and fabricated structural product manufacturing	low	NEW	moderate	
33232	Ornamental and architectural metal products manufacturing	low	negative	moderate	
3325	Hardware manufacturing	low	fast	very strong	X
33271	Machine shops	very strong	fast	very strong	X
3328	Coating, engraving, heat treating and allied activities	low	NEW	strong	
332996	Fabricated pipe and pipe fitting manufacturing	low	negative	strong	
332997-9	Other fabricated metal manufacturing	low	negative	strong	

Table 7 - Kingman Economic Region Industry Targets

NAICS	Description	Kingman Economic Region LQ	Mohave County Annualized Growth (2005-2009)	Mohave County Average Annual Wage	Target
Manufacturing (Continued)					
Machinery Manufacturing					
33312	Construction machinery manufacturing	strong	NEW	strong	X
333319	Other commercial and service industry machinery manufacturing	low	slow	low	
333411-2	Air purification and ventilation equipment manufacturing	very strong	slow	moderate	X
333992,	Other general purpose machinery manufacturing	low	fast	low	
333997,					
333999					
333995-6	Fluid power process machinery	very strong	fast	strong	X
Transportation Equipment Manufacturing					
336212	Truck trailer manufacturing	very strong	negative	low	
336214	Travel trailer and camper manufacturing	very strong	NEW	low	
336413	Other aircraft parts and auxiliary equipment manufacturing	strong	negative	very strong	X
3365	Railroad rolling stock manufacturing	very strong	slow	strong	X
336999	All other transportation equipment manufacturing	low	NEW	low	
Wood Product Manufacturing					
321213-4	Engineered wood member and truss manufacturing	strong	negative	low	
321992	Prefabricated wood building manufacturing	strong	negative	strong	
33711	Wood kitchen cabinet and countertop manufacturing	very strong	negative	moderate	
Aviation					
8112	Electronic and precision equipment repair and maintenance	low	negative	moderate	
8113	Commercial and industrial machinery and equipment repair and maintenance	moderate	negative	strong	
33271	Machine shops	very strong	fast	very strong	X
481	Air transportation	low	slow	very strong	X
487, 488	Scenic and sightseeing transportation and support activities for transportation	strong	negative	moderate	X

Table 7 - Kingman Economic Region Industry Targets

NAICS	Description	Kingman Economic Region LQ	Mohave County Annualized Growth (2005-2009)	Mohave County Average Annual Wage	Target
Transportation and Logistics					
481	Air transportation	low	slow	very strong	
482	Rail transportation	strong	slow	very strong	X
484	Truck transportation	strong	negative	strong	
493	Warehousing and storage	strong	moderate	low	X

Source: Bureau of Labor Statistics, Quarterly Census of Employment and Wages (QCEW); IMPLAN; ESI Corp

Table 8 - Lake Havasu Economic Region Industry Targets

NAICS	Description	Lake Havasu City Economic Region LQ	Mohave County Annualized Growth (2005-2009)	Mohave County Average Annual Wage	Target
Arts and Entertainment					
441	Retail - Motor vehicle and parts	strong	negative	strong	
442	Retail - Furniture and home furnishings	strong	negative	moderate	
443	Retail - Electronics and appliances	moderate	negative	low	
444	Retail - Building material and garden supply	strong	negative	low	
445	Retail - Food and beverage	strong	negative	moderate	
446	Retail - Health and personal care	moderate	fast	moderate	X
447	Retail - Gasoline stations	strong	negative	strong	
448	Retail - Clothing and clothing accessories	moderate	negative	low	
451	Retail - Sporting goods, hobby, book and music	strong	negative	low	
452	Retail - General merchandise	strong	moderate	low	
453	Retail - Miscellaneous	strong	negative	low	
454	Retail - Nonstore	moderate	negative	low	
483	Water transportation	low	slow	low	
487, 488	Scenic and sightseeing transportation and support activities for transportation	strong	negative	moderate	
5121	Motion picture and video industries	low	fast	low	
5151	Radio and television broadcasting	very strong	negative	strong	
5615	Travel arrangement and reservation services	strong	fast	low	X
7111	Performing arts companies	low	fast	low	
7112	Spectator sports	moderate	slow	low	
7113-4	Promoters of performing arts and sports and agents for public figures	low	NEW	low	
7115	Independent artists, writers, and performers	low	negative	very strong	
712	Museums, historical sites, zoos, and parks	low	slow	moderate	
71394	Fitness and recreational sports centers	moderate	negative	low	
71395	Bowling centers	very strong	negative	low	
7131-2	Amusement parks, arcades, and gambling industries	moderate	fast	low	X

Table 8 - Lake Havasu Economic Region Industry Targets

NAICS	Description	Lake Havasu City Economic Region LQ	Mohave County Annualized Growth (2005-2009)	Mohave County Average Annual Wage	Target
Arts and Entertainment (Continued)					
71391-3, 71399	Other amusement and recreation industries	strong	negative	low	
72111-2	Hotels and motels, including casino hotels	strong	negative	low	
72119, 7212-3	Other accommodations	very strong	negative	low	
722	Food services and drinking places	strong	negative	low	
Healthcare Services					
339116	Dental laboratories	very strong	negative	strong	
54194	Veterinary services	strong	negative	low	
6211-3	Offices of physicians, dentists, and other health practitioners	strong	moderate	very strong	X
6216	Home health care services	very strong	fast	moderate	X
6214-5, 6219	Medical and diagnostic labs and outpatient and other ambulatory care services	strong	fast	very strong	X
622	Hospitals	moderate	fast	very strong	X
623	Nursing and residential care facilities	strong	negative	low	
Manufacturing					
Misc. Manufacturing					
324121	Asphalt paving mixture and block manufacturing	very strong	fast	strong	X
324122	Asphalt shingle and coating materials manufacturing	low	negative	very strong	
339993, 339995, 339999	All other miscellaneous manufacturing	low	fast	moderate	X
Chemical Manufacturing					
32551	Paint and coating manufacturing	low	slow	very strong	

Table 8 - Lake Havasu Economic Region Industry Targets					
NAICS	Description	Lake Havasu City Economic Region LQ	Mohave County Annualized Growth (2005-2009)	Mohave County Average Annual Wage	Target
Manufacturing (Continued)					
<u>Plastics and Rubber Products Manufacturing</u>					
326122	Plastics pipe and pipe fitting manufacturing	low	slow	strong	
32614	Polystyrene foam product manufacturing	strong	NEW	strong	X
32615	Urethane and other foam product (except polystyrene) manufacturing	very strong	NEW	low	
32619	Other plastics product manufacturing	very strong	fast	strong	X
32621	Tire manufacturing	low	NEW	strong	
<u>Non-Metallic Mineral Product Manufacturing</u>					
32732	Ready-mix concrete manufacturing	very strong	negative	strong	
32733	Concrete pipe, brick, and block manufacturing	low	fast	strong	X
327991	Cut stone and stone product manufacturing	strong	fast	moderate	X
<u>Computer and Electronic Equipment Manufacturing</u>					
33421	Telephone apparatus manufacturing	very strong	fast	very strong	X
334418	Printed circuit assembly (electronic assembly) manufacturing	very strong	NEW	very strong	X
335991	Carbon and graphite product manufacturing	very strong	fast	moderate	X
<u>Fabricated Metal Product Manufacturing</u>					
332111-2,	All other forging, stamping, and sintering	very strong	NEW	strong	X
332117					
33231	Plate work and fabricated structural product manufacturing	low	NEW	moderate	
33232	Ornamental and architectural metal products manufacturing	low	negative	moderate	
<u>Fabricated Metal Product Manufacturing (Continued)</u>					
3325	Hardware manufacturing	very strong	fast	very strong	X
33271	Machine shops	strong	fast	very strong	X
3328	Coating, engraving, heat treating and allied activities	low	NEW	strong	
332996	Fabricated pipe and pipe fitting manufacturing	very strong	negative	strong	
332997-9	Other fabricated metal manufacturing	strong	negative	strong	

Table 8 - Lake Havasu Economic Region Industry Targets

NAICS	Description	Lake Havasu City Economic Region LQ	Mohave County Annualized Growth (2005-2009)	Mohave County Average Annual Wage	Target
Manufacturing (Continued)					
<u>Machinery Manufacturing</u>					
33312	Construction machinery manufacturing	strong	NEW	strong	
<u>Transportation Equipment Manufacturing</u>					
3363	Motor vehicle parts manufacturing	strong	negative	moderate	
336991	Motorcycle, bicycle, and parts manufacturing	very strong	NEW	low	
336999	All other transportation equipment manufacturing	strong	NEW	low	
<u>Wood Product Manufacturing</u>					
321213-4	Engineered wood member and truss manufacturing	low	negative	low	
321991	Manufactured home (mobile home) manufacturing	low	fast	strong	X
321992	Prefabricated wood building manufacturing	moderate	negative	strong	
321999	All other miscellaneous wood product manufacturing	very strong	negative	strong	
322223-6	All other paper bag and coated and treated paper manufacturing	very strong	NEW	moderate	
322291	Sanitary paper product manufacturing	low	fast	strong	X
33711	Wood kitchen cabinet and countertop manufacturing	strong	negative	moderate	
337122	Nonupholstered wood household furniture manufacturing	strong	negative	low	
337211,	Office furniture and custom architectural woodwork and millwork manufacturing	very strong	slow	moderate	X
337212,					
337214					
33792	Blind and shade manufacturing	strong	fast	moderate	X

Table 8 - Lake Havasu Economic Region Industry Targets

NAICS	Description	Lake Havasu City Economic Region LQ	Mohave County Annualized Growth (2005-2009)	Mohave County Average Annual Wage	Target
Information Technology					
5151	Radio and television broadcasting	very strong	negative	strong	
51913	Internet publishing and broadcasting	strong	slow	low	
517	Telecommunications	moderate	negative	strong	
518	Data processing, hosting, and related services	strong	fast	moderate	X
51911-2	Other information services	strong	slow	low	

Source: Bureau of Labor Statistics, Quarterly Census of Employment and Wages (QCEW); IMPLAN; ESI Corp

Table 9 - Unincorporated Mohave County Industry Targets					
NAICS	Description	Mohave County LQ	Mohave County Annualized Growth (2005-2009)	Mohave County Average Annual Wage	Target
Arts and Entertainment					
441	Retail - Motor vehicle and parts	strong	negative	strong	
442	Retail - Furniture and home furnishings	moderate	negative	moderate	
443	Retail - Electronics and appliances	moderate	negative	low	
444	Retail - Building material and garden supply	strong	negative	low	
445	Retail - Food and beverage	strong	negative	moderate	
446	Retail - Health and personal care	moderate	fast	moderate	X
447	Retail - Gasoline stations	very strong	negative	strong	
448	Retail - Clothing and clothing accessories	moderate	negative	low	
451	Retail - Sporting goods, hobby, book and music	strong	negative	low	
452	Retail - General merchandise	strong	fast	low	
453	Retail - Miscellaneous	strong	negative	low	
454	Retail - Nonstore	moderate	negative	low	
483	Water transportation	very strong	slow	low	
487, 488	Scenic and sightseeing transportation and support activities for transportation	strong	negative	moderate	X
5121	Motion picture and video industries	strong	fast	low	X
5151	Radio and television broadcasting	strong	negative	strong	
5615	Travel arrangement and reservation services	strong	fast	low	
7111	Performing arts companies	moderate	fast	low	
7112	Spectator sports	low	slow	low	
7113-4	Promoters of performing arts and sports and agents for public figures	moderate	NEW	low	
7115	Independent artists, writers, and performers	low	negative	very strong	
712	Museums, historical sites, zoos, and parks	strong	slow	moderate	
71394	Fitness and recreational sports centers	moderate	negative	low	
71395	Bowling centers	strong	negative	low	
7131-2	Amusement parks, arcades, and gambling industries	strong	fast	low	X
71391-3, 71399	Other amusement and recreation industries	strong	negative	low	

Table 9 - Unincorporated Mohave County Industry Targets

NAICS	Description	Mohave County LQ	Mohave County Annualized Growth (2005-2009)	Mohave County Average Annual Wage	Target
Arts and Entertainment (Continued)					
72111-2	Hotels and motels, including casino hotels	strong	negative	low	
72119,	Other accommodations	very strong	negative	low	
7212-3					
722	Food services and drinking places	strong	negative	low	
Healthcare Services					
339116	Dental laboratories	very strong	negative	strong	
54194	Veterinary services	strong	negative	low	
62111-3	Offices of physicians, dentists, and other health practitioners	strong	moderate	very strong	
6216	Home health care services	strong	fast	moderate	X
6214-5,	Medical and diagnostic labs and outpatient and other	strong	fast	very strong	X
6219	ambulatory care services	strong	fast	very strong	X
622	Hospitals	strong	fast	very strong	
623	Nursing and residential care facilities	strong	negative	low	
Energy					
2211	Electric power generation, transmission, and distribution	strong	negative	very strong	X
Manufacturing					
Misc. Manufacturing					
324121	Asphalt paving mixture and block manufacturing	very strong	fast	strong	X
324122	Asphalt shingle and coating materials manufacturing	very strong	negative	very strong	X
339993,	All other miscellaneous manufacturing	low	fast	moderate	X
339995,					
339999					

Table 9 - Unincorporated Mohave County Industry Targets

NAICS	Description	Mohave County LQ	Mohave County Annualized Growth (2005-2009)	Mohave County Average Annual Wage	Target
Manufacturing (Continued)					
<u>Plastics and Rubber Products Manufacturing</u>					
326122	Plastics pipe and pipe fitting manufacturing	very strong	slow	strong	
32614	Polystyrene foam product manufacturing	strong	NEW	strong	X
32615	Urethane and other foam product (except polystyrene) manufacturing	strong	NEW	low	
32619	Other plastics product manufacturing	very strong	fast	strong	X
32621	Tire manufacturing	very strong	NEW	strong	
<u>Non-Metallic Mineral Product Manufacturing</u>					
32733	Concrete pipe, brick, and block manufacturing	low	fast	strong	X
327991	Cut stone and stone product manufacturing	strong	fast	moderate	X
<u>Computer and Electronic Equipment Manufacturing</u>					
33421	Telephone apparatus manufacturing	very strong	fast	very strong	X
3343	Audio and video equipment manufacturing	moderate	fast	strong	X
334418	Printed circuit assembly (electronic assembly) manufacturing	very strong	NEW	very strong	X
<u>Fabricated Metal Product Manufacturing</u>					
332111-2,	All other forging, stamping, and sintering	very strong	NEW	strong	X
332117					
33231	Plate work and fabricated structural product manufacturing	low	NEW	moderate	
33232	Ornamental and architectural metal products manufacturing	low	negative	moderate	
3325	Hardware manufacturing	strong	fast	very strong	X
33271	Machine shops	very strong	fast	very strong	X
3328	Coating, engraving, heat treating and allied activities	low	NEW	strong	X
332996	Fabricated pipe and pipe fitting manufacturing	strong	negative	strong	X
332997-9	Other fabricated metal manufacturing	moderate	negative	strong	X

Table 9 - Unincorporated Mohave County Industry Targets

NAICS	Description	Mohave County LQ	Mohave County Annualized Growth (2005-2009)	Mohave County Average Annual Wage	Target
Manufacturing (Continued)					
Machinery Manufacturing					
33312	Construction machinery manufacturing	strong	NEW	strong	X
333411-2	Air purification and ventilation equipment manufacturing	strong	slow	moderate	X
333992,	Other general purpose machinery manufacturing	moderate	fast	low	
333997,					
333999					
333995-6	Fluid power process machinery	very strong	fast	strong	X
Transportation Equipment Manufacturing					
336212	Truck trailer manufacturing	very strong	negative	low	
336214	Travel trailer and camper manufacturing	very strong	NEW	low	
3363	Motor vehicle parts manufacturing	low	negative	moderate	
Transportation Equipment Manufacturing (Continued)					
3365	Railroad rolling stock manufacturing	very strong	slow	strong	
Wood Product Manufacturing					
321213-4	Engineered wood member and truss manufacturing	strong	negative	low	
321992	Prefabricated wood building manufacturing	moderate	negative	strong	
Transportation and Logistics					
481	Air transportation	low	slow	very strong	X
482	Rail transportation	strong	slow	very strong	X
484	Truck transportation	strong	negative	strong	X
493	Warehousing and storage	low	moderate	low	X
Information Technology					
5151	Radio and television broadcasting	strong	very strong	negative	
51913	Internet publishing and broadcasting	strong	strong	slow	
517	Telecommunications	moderate	moderate	negative	
518	Data processing, hosting, and related services	moderate	strong	fast	X
51911-2	Other information services	strong	strong	slow	

Table 9 - Unincorporated Mohave County Industry Targets

NAICS	Description	Mohave County LQ	Mohave County Annualized Growth (2005-2009)	Mohave County Average Annual Wage	Target
Mining					
2121	Coal mining	strong	NEW	very strong	
21223	Copper, nickel, lead, and zinc mining	strong	fast	very strong	X
21231	Stone mining and quarrying	low	fast	very strong	X
21232	Sand, gravel, clay, and ceramic and refractory minerals mining and quarrying	moderate	fast	strong	X
21239	Other nonmetallic mineral mining and quarrying	very Strong	moderate	strong	X
213111	Drilling oil and gas wells	strong	fast	very strong	
213113-5	Support activities for other mining	strong	NEW	very strong	X

Source: Bureau of Labor Statistics, Quarterly Census of Employment and Wages (QCEW); IMPLAN; ESI Corp

2. PROJECT OVERVIEW

In the complex world of economic development, organizations across the country desire to pinpoint the industries that have the highest probability of expanding or locating in their region or community. Time and resources are limited and economic developers and policy makers alike recognize that a strategic approach to targeting these industries will yield greater returns to the community.

A Target Industry Analysis provides the strategic framework for public policy by identifying those industries that share the demand for a similarly educated labor pool, supply chain or customer base. It's a method utilized by economic development organizations to understand the market and align their limited resources in order to more effectively brand and market their community and region.

ECONOMIC REGION SELECTION

The Mohave County economic regions were delineated utilizing a combination of factors to determine the scope of each area. These factors included employment center concentrations, development patterns, trade associations, transportation networks, participating community feedback, and data availability.

The identification of economic regions was focused on the southern portion of Mohave County, where the majority of the people and economic activity is concentrated and included Kingman, Ft. Mohave, Bullhead City/Laughlin and Lake Havasu City. Discussions with the community representatives, stakeholders, and area economic development agencies during the kick off meeting helped to refine the economic regions. These three economic regions were aggregated utilizing U.S. postal service zip codes, are displayed in Figure 1 and defined in Table 10 below.

Bullhead City Region

The Bullhead City Economic Region is made up of twelve zip codes from Mohave County, Arizona, Clark County, Nevada, and San Bernardino County, California. This region encompasses 2,591 square miles and contains 74,560 people in 2009. These statistics translate to 28.8 persons per square mile, whom compose a total of 29,663 households, with a household size of 2.5. Approximately 58 percent of these households earn between \$15,000 to \$50,000. Total employment in this economic region is 28,764 persons with an average income of \$43,278. The major employers in the Bullhead City Economic Region include Western Arizona Regional Medical Center, Silver Ridge Village, and Mohave Community College.

Kingman Region

The Kingman Economic Region is made up of eight zip codes that encompass 2,133 square miles, which contained 61,735 people in 2009. This region has the highest population density of the three geographies detailed in this report at 28.9 persons per square mile, whom compose a total of 24,063 households, with a household size of 2.6. Approximately 52 percent of these households earn between \$15,000 to \$50,000. Total employment in this economic region is 21,334 persons with an average income of \$40,027. The major employers in the Kingman Economic Region include Kingman Regional Medical Center, American Woodmark Corp., IWX Motor Freight, and McKee Foods.

Table 10 – Economic Region Definitions by Zip code

Bullhead City	Kingman	Lake Havasu City
86426	86401	86403
86429	86409	86404
86436	86413	86406
86440	86441	86405PO
86442	86445	
89029	86402PO	
92363	86411PO	
89028PO	86412PO	
86427PO		
86430PO		
86439PO		
86446PO		

Source: ESI Corp; U.S. Postal Service
 Note: PO = Post Office Box

Lake Havasu City Region

The Lake Havasu City Economic Region is made up of four zip codes that encompass 2,396 square miles, which contained 56,618 people in 2009. The least dense of the three geographies, this region hosts 23.6 persons per square mile, whom compose a total of 23,232 households, with a household size of 2.4. Approximately 55 percent of these households earn between \$15,000 to \$50,000. Total employment in this economic region is 19,462 persons with an average income of \$37,891. The major employers in the Lake Havasu City Economic Region include Havasu Samaritan Regional Hospital, Mohave Community College, Sterlite Corp., and Wal-Mart.

INDUSTRY ANALYSIS METHODOLOGY

The target cluster analysis identifies the priority areas for the attention of Mohave County and its regional economic development partners. It is envisioned that over time, these clusters should be re-evaluated and updated to ensure that the County responds to market changes.

A number of tasks were undertaken within this target cluster analysis. Each Economic Region was treated independently when analyzing and choosing the appropriate industry targets and amassing clusters. In addition to the industry cluster analysis, a site suitability analysis and competitive analysis were also prepared. The competitive analysis focused primarily on industries that have “site location” choices, such as logistics, manufacturing, etc, rather than those tied to a specific geography servicing the local customer base, such as retail.

Location Quotient (LQ)

Several factors were utilized in evaluating the industry cluster potential, including relative employment concentration. Location quotients are used to identify the relative concentration of local employment within a given business sector. This analysis was conducted at the six digit NAICS level by screening for industry attractiveness and area competitiveness. A location quotient (LQ) was computed for each industry, using the following mathematical formula:

$$\text{LQ} = \frac{\text{Economic Region Industry Employment} / \text{Economic Region Total Employment}}{\text{Arizona Industry Employment} / \text{Arizona Total Employment}}$$

A sector with an LQ equal to 1.0 has the same share of total employment as the sector's share of state employment. If a LQ is greater than 1.0, that signifies that the sector is more concentrated within the economic region than the state. Likewise, if an LQ is less than 1.0 that means it is less concentrated than the state. Based on the findings of the LQ analysis, it became apparent what core industries were represented in each economic region. Wages by industry were compared to the average annual wage in Mohave County to help determine industry attractiveness.

Industry Wage and Job Growth

In addition to analyzing the strength of an industry's employment, it is crucial to evaluate, the "economic prosperity factor," by examining the average payroll per employee. A highly competitive LQ does not necessarily equate to a high wage industry. While average industry wage and growth rates were not used to "screen out" industries, it is certainly a metric that Mohave County and its regional economic development partners can use to make informed decisions about industry targeting and where to focus limited financial resources.

Cluster Formation

Industry clusters are defined in literature as a group of industries that share a majority of occupations, similar site location requirements, have overlapping supply chain and natural resource inputs, and possess geographic proximity. For this step in the analysis, the clusters were identified through industry occupation and supply chain relationships. The level of overall employment also served as a key determinant of cluster identification.

A review of the existing mix and concentration of business and industry by defined economic region was undertaken, followed by assessing the relative state and county growth trends of those businesses and industries. Based on the analysis a preliminary list of Industry clusters were presented to the regional economic development partners at a meeting for review and discussion. At this meeting the list of clusters was fine-tuned, resulting in the final list of industry clusters by economic region. In addition, a list of industry clusters was also identified for Mohave County to pursue in its unincorporated areas.

Industry Cluster Occupations

Taking the final list of industry clusters, a select group of occupations were identified for each Cluster utilizing industry-occupation crosswalks and other research. The occupations which were selected are those that comprise the majority of the workforce within the cluster. These findings can be used to understand which occupational segments are growing and should become the attention of education and workforce development professionals to help build a talent pipeline to support businesses within the region and aid in recruitment.

3. TARGET CLUSTER ANALYSIS

Industry Clusters are sets of industries that share common occupations, supply chains, resource inputs, and other industry characteristics. A total of nine industry clusters have been defined for the economic regions and Mohave County. Each Economic Region, and the County itself, contain unique characteristics which have culminated in a different set of clusters, and subsequently varied set of industry targets, for each geography.

As noted in the methodology, the recommended targets were selected based on a quantitative and qualitative research and input from the regional economic development partners. The findings of the quantitative analysis are appended to this report and are presented by industry. The database lists industries by NAICS, employment growth at the county level, employment by economic region, employment at the state level, location quotient (LQ), and the average industry wage.

INDUSTRY ANALYSIS

The Industry Analysis was heavily based upon the aggregation of existing industries that have larger concentrations of employees than the state of Arizona as a whole. Table 11 lists the projected industry growth in Mohave County, each economic region's LQ compared to Arizona, and the industries' average annual pay. The table only includes those industries that are associated with the clusters identified in this study. Other industries that do not appear below may be able to support the cluster networks identified. Each cluster is not static in time and will change with the birth and death of businesses in the delineated regions. Additional industries that will support or create a more robust cluster core should not be overlooked due to their absence. In addition, the clusters themselves may change over time as the market drives the concentration of industries from one to another.

Table 11 can be used to benchmark the current situation in each economic region and gauge the growth of each cluster as new data is made available. Certain Industries did not exist in 2005, therefore these appear as "NEW" in the Mohave County growth percentage column, and denote business births between 2005 and 2009. Since these industries did not exist in Mohave County in 2005, growth can not be calculated.

INDUSTRY CLUSTERS

The industry clusters represent the priority areas approved by the regional economic development partners. Over time these clusters should be reviewed and updated in order to respond to changing market conditions and maximize economic development opportunities. The industry cluster recommendations are not intended to entirely replace existing economic and workforce development efforts, but rather supplement them. For example, workforce development efforts in the County should continue to focus on areas of need such as construction and waste management training.

Following is an overview of each industry cluster identifying the types of industries embodied within the cluster, its significance in the region, and how well it pays in aggregate.

Arts and Entertainment

The Arts and Entertainment Cluster produces spectator art works, facilitates site-seeing activities, provides the means for varied recreational sports, and generally provides goods and services for various

tourism industries in the Mohave County region. Specific examples of this cluster's products include lodging, tour guides, live performance art, spectator sports, food and beverage services, and sport equipment rentals. In contrast to basic industries, these quasi-basic Arts and Entertainment activities attract the consumer to their location, rather than exporting the product to the consumer location. There is no doubt that a percentage of local consumers engage in these Arts and Entertainment activities making it quasi-basic.

The Arts and Entertainment Cluster is a large existing Cluster in all three economic regions due to the regional climate and the entire counties' proximity to many bodies of water, the Grand Canyon, Mohave and Sonoran Deserts, Colorado Plateau/Mogollon Rim, National Forests, Hoover Dam, and the Phoenix, Las Vegas, and Los Angeles metropolitan areas. The industries that encompass the Arts and Entertainment Cluster in Mohave County have an average annual pay of \$27,724, which is 29.2 percent less than the overall County at \$39,133.

Aviation

The Aviation Cluster provides commercial and industrial aviation operational support services, as well as, the manufacturing of aviation parts and products, and the restoration of airplanes and other aviation equipment. Specific Aviation Cluster activities include airport operation and maintenance, airplane restoration, airplane maintenance, and airplane hangar storage.

The existing Aviation Cluster in the Kingman Economic Region at the Kingman Airport builds on the historic use of the area for an Air Force training field, then one of five national aircraft disposal centers, which involved storage, sales, and scrapping activities. Once these Armed Forces activities subsided, the airfield was transferred to civilian use in 1949. The Industries that make up the existing Aviation Cluster in Mohave County have an average annual pay of \$62,197, surpassing the total Mohave County Industry annual pay of \$39,133 by \$23,064.

Energy

The Energy Cluster produces electricity through various means of generation including, but not limited to, natural gas, biomass, wind, PV solar, and other fuel sources. This Cluster also involves the transmission and distribution of electric power, and distribution of natural gas.

Certain energy industries are growing nationally, as well as locally, as government policy hopes to nudge the industry to cleaner burning fuels and alternative energy sources. The Kingman Economic Region receives its natural gas supplies through pipelines that originate in New Mexico and Texas. In addition, much of Northern Arizona has been rated favorably for wind power generation potential. At \$78,016, the existing industries in the Energy Cluster in Mohave County exceed the County's average annual industry pay, \$39,133, by \$38,883.

Healthcare Services

The Healthcare Services cluster includes industries offering health services primarily to the general public through hospitals, medical facilities and offices. The Healthcare Cluster includes a full spectrum of health services including mental health, pediatrics, acute care, long-term care, outpatient services, home healthcare, and elderly care.

Each Economic Region contains a hospital facility and is poised to add healthcare facilities as the population grows larger and demand increases for these services. The existing Healthcare Services Cluster in Mohave County has average annual pay of \$51,327, which is \$12,194 higher than the overall County average annual pay of \$39,133.

Information Technology

The Information Technology (IT) Cluster provides telecommunication support and other computer related data and information collection, conveyance, distribution, and computer software/hardware related products and services. Jobs in the information technology cluster involve the design, development, support, and management of hardware, software multimedia, and systems integration services.

The existing Information technology Cluster in Lake Havasu City only makes up about 1.1% of the economic region's total employment, however, over the last decade; digital media has infiltrated almost each and every industry. The reliance on IT throughout all sectors and industries does not show any sign of waning in the near future. The Average Annual Industry Wage in this Cluster (\$40,745) is \$1,612 higher than the overall Mohave County Average Industry Wage (\$39,133).

Manufacturing

The Manufacturing Cluster is involved in the production of hard-goods ranging the gamut of materials from composites and metals, to plastics and refractory materials. These goods may be simple one piece components, mechanical devices, electronics, complex multiple part apparatus, or anything in between.

Manufacturing Industries have been a mainstay of the Arizona economy for decades, and the Mohave County Region is no exception. The Kingman Economic Region contains the most manufacturing activity, followed by the Lake Havasu City Economic Region. The industries that make up each economic region's cluster vary, however the Average Annual Pay for all manufacturing industries currently operating in the Clusters identified in Mohave County is \$50,630, and is \$11,497 higher than the overall Mohave County Average Industry Wage at \$39,133.

Mining

The Mining Cluster includes industries involved in and supporting the extraction of naturally occurring mineral solids, liquids, and gases. It also includes quarrying, well operations, and the general processing of mined material. The core of this cluster operates mines, quarries, and wells, while the main mining support activities include geophysical exploration.

The Mohave County Mining Cluster has its roots in the extraction of metallic ores and non-metallic minerals. This Cluster is experiencing resurgence as metal prices have increased over the last decade and many uranium claims have been established of late, in the immediate vicinity. Mohave County also contains oil and natural gas extraction activities, in addition to coal mining, which support energy generation, and the quarrying of sand and gravel. The Mining Cluster in Mohave County pays an average annual wage of \$71,218, which is \$32,085 higher than the overall Mohave County Average Industrial Annual Pay at \$39,133.

Motorsports

The Motorsports Cluster provides products and services to the myriad of motorsports industries including but not limited to the automotive, motorcycle, marine, off-road, street-legal, and professional track and other racing motorsport activities. These products and services include parts suppliers, fabricators, maintenance, restoration, and after-market replacement and upgrade components manufacturers, suppliers, wholesalers, and retailers.

The Lake Havasu City Economic Region Motorsports Cluster is largely made up of industries that appeal to automotive enthusiasts. This economic region is based upon an original planned community that has always focused on tourism, and motor boating in particular. The Motorsports Cluster in Mohave County

enjoys a higher average annual pay than the County as a whole at \$41,048, which is \$1,915 higher than the overall Mohave County Average Industrial Annual Pay at \$39,133.

Transportation and Logistics

The Transportation and Logistics Cluster is primarily involved in the movement of goods, including but not limited to, freight hauling, storage, and distribution. The core of this cluster revolves around trucking, rail hauling, and warehousing, however, includes air and marine freight and other storage and distribution activities.

The Kingman Transportation and Logistics Cluster is currently in a strategic position for growth as Pacific ports and other west coast inland ports continue to reach capacity and push eastward. The ability for multimodal transportation opportunities also abound with Kingman's access to major highway, rail, and airport operations in the vicinity. The Transportation and Logistics Cluster in Mohave County pays an average annual wage of \$67,623, which is \$28,490 higher than the overall Mohave County Average Industrial Annual Pay at \$39,133.

Table 11 - Economic Region Industry Cluster Concentration, Growth and Average Wage

NAICS	Description	Bullhead City LQ	Kingman LQ	Lake Havasu City LQ	Mohave County LQ	Mohave County Growth (2005-2009)	Mohave County Average Annual Wage
Arts and Entertainment							
441	Retail - Motor vehicle and parts	0.98	1.80	1.74	1.65	-22.0%	\$46,707
442	Retail - Furniture and home furnishings	0.46	0.38	1.02	0.66	-63.1%	\$37,740
443	Retail - Electronics and appliances	0.45	0.31	0.54	0.52	-45.1%	\$29,679
444	Retail - Building material and garden supply	1.62	1.61	2.20	2.17	-5.1%	\$34,702
445	Retail - Food and beverage	0.85	1.04	1.41	1.28	-11.2%	\$35,878
446	Retail - Health and personal care	0.69	0.92	0.90	0.81	22.8%	\$43,997
447	Retail - Gasoline stations	1.64	5.10	2.26	3.46	-4.0%	\$47,443
448	Retail - Clothing and clothing accessories	1.64	0.63	0.73	0.68	-3.5%	\$17,749
451	Retail - Sporting goods, hobby, book and music	0.97	0.99	1.22	1.11	-4.8%	\$17,043
452	Retail - General merchandise	1.71	1.57	1.93	2.04	16.9%	\$26,097
453	Retail - Miscellaneous	1.03	1.29	1.41	1.40	-6.8%	\$22,280
454	Retail - Nonstore	0.17	1.64	0.52	0.85	-4.2%	\$8,893
483	Water transportation	59.62	0.00	0.00	4.96	0.0%	\$24,235
487, 488	Scenic and sightseeing transportation and support activities for transportation	0.61	1.90	1.11	1.30	-19.8%	\$35,347
5121	Motion picture and video industries	1.51	4.65	0.00	1.69	105.1%	\$15,575
5122	Sound recording industries	0.00	0.00	0.00	0.00	0.0%	N/A
5151	Radio and television broadcasting	1.53	0.40	3.54	2.04	-16.5%	\$45,539
5152	Cable and other subscription programming	0.00	0.00	0.00	0.00	0.0%	N/A
5615	Travel arrangement and reservation services	0.24	0.30	2.49	2.54	59.2%	\$30,757
7111	Performing arts companies	0.00	1.85	0.00	0.67	200.0%	\$6,885
7112	Spectator sports	0.00	0.00	0.87	0.29	0.0%	\$5,108
7113-4	Promoters of performing arts and sports and agents for public figures	0.00	2.40	0.00	0.87	NEW	\$13,901
7115	Independent artists, writers, and performers	0.00	0.59	0.00	0.21	-80.0%	\$84,806
712	Museums, historical sites, zoos, and parks	0.00	1.64	0.00	1.40	0.0%	\$37,854
71394	Fitness and recreational sports centers	0.87	0.21	0.74	0.75	-16.4%	\$10,962
71395	Bowling centers	0.00	3.23	3.54	2.35	-48.1%	\$15,876

Table 11 - Economic Region Industry Cluster Concentration, Growth and Average Wage

NAICS	Description	Bullhead City LQ	Kingman LQ	Lake Havasu City LQ	Mohave County LQ	Mohave County Growth (2005-2009)	Mohave County Average Annual Wage
Arts and Entertainment (Continued)							
7131-2	Amusement parks, arcades, and gambling industries	3.72	0.08	0.82	1.03	80.0%	\$20,365
71391-3, 71399	Other amusement and recreation industries	2.11	0.11	1.12	1.41	-13.8%	\$22,893
72111-2	Hotels and motels, including casino hotels	33.15	1.22	1.38	1.11	-2.9%	\$21,701
72119, 7212-3	Other accommodations	3.32	2.63	3.70	4.02	-3.7%	\$25,548
722	Food services and drinking places	1.32	1.16	1.60	1.34	-5.3%	\$18,433
Aviation							
8112	Electronic and precision equipment repair and maintenance	0.73	0.00	1.30	0.79	-11.5%	\$38,958
8113	Commercial and industrial machinery and equipment repair and maintenance	0.11	0.66	0.44	0.44	-31.0%	\$46,023
33271	Machine shops	0.00	11.52	1.87	4.81	86.9%	\$68,963
332911-2, 332919	Valve and fittings other than plumbing	0.00	0.00	0.00	0.00	0.0%	N/A
334412	Bare printed circuit board manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
336411	Aircraft manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
481	Air transportation	0.02	0.03	0.01	0.02	0.0%	\$121,696
487, 488	Scenic and sightseeing transportation and support activities for transportation	0.61	1.90	1.11	1.30	-20.0%	\$35,347
Energy							
211	Oil and gas extraction	0.01	0.05	0.03	0.05	0.0%	\$24,745
213111	Drilling oil and gas wells	0.80	1.27	1.32	1.31	300.0%	\$63,548
213112	Support activities for oil and gas operations	0.00	0.00	0.00	0.00	0.0%	N/A
213113-5	Support activities for other mining	1.39	2.22	2.29	2.29	NEW	\$87,034
2211	Electric power generation, transmission, & dist.	0.67	2.02	0.35	1.14	-9.9%	\$91,683
2212	Natural gas distribution	3.18	4.29	1.98	3.78	7.2%	\$66,460
32411	Petroleum refineries	0.00	0.00	0.00	0.00	0.0%	N/A
324191	Petroleum lubricating oil and grease manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
324199	All other petroleum and coal products manufacturing	0.00	0.00	0.00	0.00	0.0%	C
32511	Petrochemical manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
32512	Industrial gas manufacturing	0.00	20.71	0.00	7.53	-33.3%	\$134,626

Table 11 - Economic Region Industry Cluster Concentration, Growth and Average Wage

NAICS	Description	Bullhead City LQ	Kingman LQ	Lake Havasu City LQ	Mohave County LQ	Mohave County Growth (2005-2009)	Mohave County Average Annual Wage
Healthcare Services							
339116	Dental laboratories	0.00	0.00	13.34	4.42	-48.6%	\$54,909
5417	Scientific research and development services	0.16	0.00	0.00	0.08	-20.0%	\$66,323
54194	Veterinary services	0.79	2.54	2.03	1.98	-2.2%	\$31,961
62111-3	Offices of physicians, dentists, and other health practitioners	0.97	1.37	1.90	1.60	19.8%	\$60,895
6216	Home health care services	0.21	0.00	3.88	1.39	333.3%	\$35,128
6214-5,	Medical and diagnostic labs and outpatient and other ambulatory	0.76	0.81	1.18	1.08	22.8%	\$64,494
6219	care services						
622	Hospitals	1.58	3.31	0.78	2.23	30.7%	\$67,561
623	Nursing and residential care facilities	1.17	1.42	1.72	1.66	-3.4%	\$29,342
Information Technology							
33422	Broadcast and wireless communications equipment	0.00	0.00	0.00	0.00	0.0%	N/A
51121	Software publishers	0.00	0.00	0.00	0.00	-100.0%	N/A
51913	Internet publishing and broadcasting	1.51	2.40	2.49	2.48	0.0%	\$34,843
517	Telecommunications	0.37	0.86	0.89	0.76	-30.0%	\$52,611
518	Data processing, hosting, and related services	0.03	0.00	2.08	0.69	38.0%	\$40,735
51911-2	Other information services	1.48	2.35	2.43	2.42	0.0%	\$34,792
Manufacturing							
Misc. Manufacturing							
3161	Leather and hide tanning and finishing	0.00	0.00	0.00	0.00	0.0%	N/A
3169	Other leather and allied product manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
324121	Asphalt paving mixture and block manufacturing	0.63	10.20	7.77	6.85	600.0%	\$54,247
324122	Asphalt shingle and coating materials manufacturing	0.00	30.73	0.00	11.17	-18.8%	\$81,429
332992-3	Ammunition manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
332994-5	Arms, ordnance, and accessories manufacturing	0.09	1.48	1.12	0.99	-47.4%	\$73,632
337124-5	Metal and other household furniture (except wood) manufacturing ¹	0.05	0.82	0.63	0.55	0.0%	\$49,504
33991	Jewelry and silverware manufacturing	0.05	0.76	0.58	0.51	100.0%	\$49,897
33994	Office supplies (except paper) manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
339991	Gasket, packing, and sealing device manufacturing	0.00	0.00	64.97	21.54	0.0%	\$36,117
339992	Musical instrument manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A

Table 11 - Economic Region Industry Cluster Concentration, Growth and Average Wage

NAICS	Description	Bullhead City LQ	Kingman LQ	Lake Havasu City LQ	Mohave County LQ	Mohave County Growth (2005-2009)	Mohave County Average Annual Wage
Misc. Manufacturing (Continued)							
339993,	All other miscellaneous manufacturing	0.22	0.29	0.22	0.20	600.0%	\$44,827
339995,							
339999	Sign manufacturing	0.25	0.68	1.05	0.72	-82.3%	\$34,564
33995							
Chemical Manufacturing							
32592,	All other chemical product and preparation manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
32599							
325188	All other basic inorganic chemical manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
325211	Plastics material and resin manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
325212	Synthetic rubber manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
32519	Other basic organic chemical manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
32522	Artificial and synthetic fibers and filaments manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
32551	Paint and coating manufacturing	0.04	0.60	0.46	0.40	0.0%	\$89,500
32552	Adhesive manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
32561	Soap and cleaning compound manufacturing	0.30	2.35	0.00	1.00	-72.7%	\$125,183
32562	Toilet preparation manufacturing	0.03	0.52	0.39	0.35	NEW	\$105,719
32591	Printing ink manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
Plastics and Rubber Products Manufacturing							
326121	Unlaminated plastics profile shape manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
326122	Plastics pipe and pipe fitting manufacturing	0.00	19.17	0.00	6.97	0.0%	\$47,570
32611	Plastics packaging materials and unlaminated film and sheet manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
32613	Laminated plastics plate, sheet (except packaging), and shape manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
32614	Polystyrene foam product manufacturing	0.12	2.03	1.54	1.36	NEW	\$58,041
32615	Urethane and other foam product (except polystyrene) manufacturing	0.00	0.00	7.82	2.59	NEW	\$30,742
32616	Plastics bottle manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
32619	Other plastics product manufacturing	0.00	1.09	26.21	9.08	21.2%	\$46,382
32621	Tire manufacturing	0.00	58.42	0.00	21.23	NEW	\$54,266
32622	Rubber and plastics hoses and belting manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
32629	Other rubber product manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A

Table 11 - Economic Region Industry Cluster Concentration, Growth and Average Wage

NAICS	Description	Bullhead City LQ	Kingman LQ	Lake Havasu City LQ	Mohave County LQ	Mohave County Growth (2005-2009)	Mohave County Average Annual Wage
Non-Metallic Mineral Product Manufacturing							
3274	Lime and gypsum product manufacturing	0.00	0.00	0.00	57.60	-68.6%	\$71,025
32711	Pottery, ceramics, and plumbing fixture manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
32731	Cement manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
32732	Ready-mix concrete manufacturing	1.35	0.00	4.45	2.14	-37.8%	\$51,328
32733	Concrete pipe, brick, and block manufacturing	0.62	0.14	0.00	0.36	100.0%	\$52,972
32739	Other concrete product manufacturing	0.00	0.00	0.00	0.00	-100.0%	N/A
32791	Abrasive product manufacturing	0.00	0.00	4.69	1.56	NEW	\$69,366
327211	Flat glass manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
327212	Other pressed and blown glass and glassware manufacturing	0.00	0.00	0.00	0.00	-100.0%	N/A
327213	Glass container manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
327215	Glass product manufacturing made of purchased glass	0.02	0.41	0.31	0.28	200.0%	\$61,418
327991	Cut stone and stone product manufacturing	0.21	3.55	2.70	2.38	400.0%	\$43,340
327992	Ground or treated mineral and earth manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
327993	Mineral wool manufacturing	0.00	141.16	0.00	51.30	10300.0%	\$60,389
327999	Miscellaneous nonmetallic mineral products	0.00	0.00	0.00	0.00	0.0%	N/A
327121-3	Brick, tile, and other structural clay product mfg	0.00	0.00	0.00	0.61	-85.0%	\$36,382
327124-5	Clay and nonclay refractory manufacturing	0.49	8.14	6.20	5.47	NEW	\$88,946
Computer and Electronic Equipment Manufacturing							
334112	Computer storage device manufacturing	0.00	0.00	0.00	0.00	-100.0%	N/A
334113,	Computer terminals and other computer peripheral equipment manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
334119	Telephone apparatus manufacturing	0.40	6.66	5.07	4.47	1100.0%	\$68,547
33421	Other communications equipment manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
33429	Audio and video equipment manufacturing	0.06	1.00	0.76	0.67	300.0%	\$53,165
3343	Bare printed circuit board manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
334412	Semiconductor and related device manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A

Table 11 - Economic Region Industry Cluster Concentration, Growth and Average Wage

NAICS	Description	Bullhead City LQ	Kingman LQ	Lake Havasu City LQ	Mohave County LQ	Mohave County Growth (2005-2009)	Mohave County Average Annual Wage
Computer and Electronic Equipment Manufacturing (Continued)							
334414-6	Electronic capacitor, resistor, coil, transformer, and other inductor manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
334417	Electronic connector manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
334418	Printed circuit assembly (electronic assembly) manufacturing	0.30	4.95	3.77	3.32	NEW	\$90,986
334419	Other electronic component manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
334510	Electromedical and electrotherapeutic apparatus manufacturing	0.04	0.68	0.52	0.46	133.3%	\$85,710
334511	Search, detection, and navigation instruments manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
334512	Automatic environmental control manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
334513	Industrial process variable instruments manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
334514	Totalizing fluid meters and counting devices manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
334515	Electricity and signal testing instruments manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
334516	Analytical laboratory instrument manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
334517	Irradiation apparatus manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
334518-9	Watch, clock, and other measuring and controlling device manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
334611-2	Software, audio, and video media reproducing	0.00	0.00	0.00	0.00	0.0%	N/A
334613	Magnetic and optical recording media manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
33511	Electric lamp bulb and part manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
33512	Lighting fixture manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
33521	Small electrical appliance manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
335221	Household cooking appliance manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
335222	Household refrigerator and home freezer manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
335224	Household laundry equipment manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
335311	Power, distribution, and specialty transformer manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
335312	Motor and generator manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
335313	Switchgear and switchboard apparatus manufacturing	0.00	0.00	0.00	0.00	-100.0%	N/A
335314	Relay and industrial control manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
335911	Storage battery manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
335912	Primary battery manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
33592	Communication and energy wire and cable manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A

Table 11 - Economic Region Industry Cluster Concentration, Growth and Average Wage

NAICS	Description	Bullhead City LQ	Kingman LQ	Lake Havasu City LQ	Mohave County LQ	Mohave County Growth (2005-2009)	Mohave County Average Annual Wage
Computer and Electronic Equipment Manufacturing (Continued)							
33593	Wiring device manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
335991	Carbon and graphite product manufacturing	1.82	30.09	22.91	20.20	400.0%	\$38,318
335999	All other miscellaneous electrical equipment and component manufacturing	0.00	0.00	0.00	0.00	-100.0%	N/A
Fabricated Metal Product Manufacturing							
332111-2,	All other forging, stamping, and sintering	0.91	15.03	11.44	10.09	NEW	\$49,249
332117							
332115-6	Crown and closure manufacturing and metal stamping	0.00	0.00	0.00	0.00	0.0%	N/A
332211,	Cutlery, utensil, pot, and pan manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
332214							
332212-3	Handtool manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
33231	Plate work and fabricated structural product manufacturing	0.05	0.07	0.43	0.19	NEW	\$42,550
33232	Ornamental and architectural metal products manufacturing	0.08	0.16	0.00	0.09	-62.5%	\$41,311
33241	Power boiler and heat exchanger manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
33242	Metal tank (heavy gauge) manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
33243	Metal can, box, and other metal container (light gauge) manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
3325	Hardware manufacturing	0.00	0.00	8.09	2.68	366.7%	\$67,604
3326	Spring and wire product manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
33271	Machine shops	0.00	11.52	1.87	4.81	86.9%	\$68,963
33272	Turned product and screw, nut, and bolt manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
3328	Coating, engraving, heat treating and allied activities	0.00	0.41	0.24	0.23	NEW	\$48,226
332911-2,	Valve and fittings other than plumbing	0.00	0.00	0.00	0.00	0.0%	N/A
332919							
332913	Plumbing fixture fitting and trim manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
332996	Fabricated pipe and pipe fitting manufacturing	0.00	0.00	4.92	1.63	-84.2%	\$56,798
332997-9	Other fabricated metal manufacturing	0.00	0.00	1.88	0.62	-63.2%	\$46,069
Machinery Manufacturing							
333111	Farm machinery and equipment manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
333112	Lawn and garden equipment manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
33312	Construction machinery manufacturing	0.11	1.86	1.42	1.25	NEW	\$46,668
33313	Mining and oil and gas field machinery manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A

Table 11 - Economic Region Industry Cluster Concentration, Growth and Average Wage

NAICS	Description	Bullhead City LQ	Kingman LQ	Lake Havasu City LQ	Mohave County LQ	Mohave County Growth (2005-2009)	Mohave County Average Annual Wage
Machinery Manufacturing (Continued)							
33321,	Other industrial machinery manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
333291-4,							
333298	Plastics and rubber industry machinery manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
33322	Semiconductor machinery manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
333295	Vending, commercial, industrial, and office machinery manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
333311-3	Optical instrument and lens manufacturing	0.00	0.00	5.36	1.78	-11.1%	\$52,124
333314	Photographic and photocopying equipment manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
333315	Other commercial and service industry machinery manufacturing	0.00	0.00	0.57	0.19	0.0%	\$32,485
333319	Air purification and ventilation equipment manufacturing	0.22	3.67	2.79	2.46	0.0%	\$40,076
333411-2	Heating equipment (except warm air furnaces) manufacturing	0.00	0.00	0.00	16.00	NEW	\$42,149
333414	Air conditioning, refrigeration, and warm air heating equipment manufacturing	0.15	0.00	0.00	0.07	NEW	\$21,910
333511	Industrial mold manufacturing	0.00	0.00	0.00	0.14	-33.3%	\$29,765
333512-3	Metal cutting and forming machine tool manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
333514	Special tool, die, jig, and fixture manufacturing	0.00	0.00	0.00	0.00	-100.0%	N/A
333515	Cutting tool and machine tool accessory manufacturing	0.00	0.00	10.39	3.45	-54.2%	\$31,485
333516,	Rolling mill and other metalworking machinery mfg	0.00	0.00	0.00	0.00	0.0%	N/A
333518	Turbine and turbine generator set units manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
333611	Speed changer, industrial high-speed drive, and gear	0.00	0.00	0.00	0.00	0.0%	N/A
333612	Other engine equipment manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
333618	Pump and pumping equipment manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
333911,							
333913							

Table 11 - Economic Region Industry Cluster Concentration, Growth and Average Wage

NAICS	Description	Bullhead City LQ	Kingman LQ	Lake Havasu City LQ	Mohave County LQ	Mohave County Growth (2005-2009)	Mohave County Average Annual Wage
<u>Machinery Manufacturing (Continued)</u>							
333921-4	Material handling equipment manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
333991	Power-driven handtool manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
333992,	Other general purpose machinery manufacturing	0.00	0.00	1.82	0.60	100.0%	\$20,904
333997,							
333999	Packaging machinery manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
333993	Industrial process furnace and oven manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
333994	Fluid power process machinery	0.01	108.63	0.00	39.48	300.0%	\$50,052
333995-6	Electronic computer manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
334111							
<u>Transportation Equipment Manufacturing</u>							
336111	Automobile manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
336112	Light truck and utility vehicle manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
336120	Heavy duty truck manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
336211	Motor vehicle body manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
336212	Truck trailer manufacturing	0.35	5.81	4.43	3.90	-95.2%	\$18,796
336213	Motor home manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
336214	Travel trailer and camper manufacturing	0.00	15.10	0.56	5.67	NEW	\$27,060
3363	Motor vehicle parts manufacturing	0.00	0.00	1.13	0.37	-50.0%	\$39,250
336411	Aircraft manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
336412	Aircraft engine and engine parts manufacturing	0.00	0.00	0.00	0.00	-100.0%	N/A
336413	Other aircraft parts and auxiliary equipment manufacturing	0.00	2.51	0.37	1.03	-36.3%	\$66,378
336414	Guided missile and space vehicle manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
336415,	Propulsion units and parts for space vehicles and guided missiles	0.00	0.00	0.00	0.00	0.0%	N/A
336419							
3365	Railroad rolling stock manufacturing	1.14	18.86	14.36	12.66	0.0%	\$51,422
336612	Boat building	0.00	0.00	50.33	16.69	-77.8%	\$44,038
336991	Motorcycle, bicycle, and parts manufacturing	0.00	0.77	4.88	1.90	NEW	\$32,396
336992	Military armored vehicle, tank, and tank component manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
336999	All other transportation equipment manufacturing	0.00	0.00	1.31	0.43	NEW	\$14,622

Table 11 - Economic Region Industry Cluster Concentration, Growth and Average Wage

NAICS	Description	Bullhead City LQ	Kingman LQ	Lake Havasu City LQ	Mohave County LQ	Mohave County Growth (2005-2009)	Mohave County Average Annual Wage
Wood Product Manufacturing							
321211-2	Veneer and plywood manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
321213-4	Engineered wood member and truss manufacturing	0.00	2.85	0.45	1.18	-90.0%	\$23,677
321219	Reconstituted wood product manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
32192	Wood container and pallet manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
321991	Manufactured home (mobile home) manufacturing	0.00	0.00	0.00	0.52	150.0%	\$48,082
321992	Prefabricated wood building manufacturing	0.06	1.05	0.80	0.70	-25.0%	\$49,421
321999	All other miscellaneous wood product manufacturing	0.00	2.07	4.70	2.31	-90.0%	\$48,534
32221	Paperboard container manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
322221-2	Coated and laminated paper, packaging paper and plastics film manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
322223-6	All other paper bag and coated and treated paper manufacturing	0.78	12.89	9.81	8.65	NEW	\$39,060
32223	Stationery product manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
322291	Sanitary paper product manufacturing	0.00	19.66	0.00	7.14	6300.0%	\$47,115
322299	All other converted paper product manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
33711	Wood kitchen cabinet and countertop manufacturing	0.00	17.22	1.89	7.00	-46.2%	\$39,505
337121	Upholstered household furniture manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
337122	Nonupholstered wood household furniture manufacturing	0.00	0.00	1.91	0.63	-13.0%	\$29,280
337127	Institutional furniture manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
337129	Wood television, radio, and sewing machine cabinet manufacturing	0.00	0.00	0.00	0.00	33.3%	N/A
337211, 337212, 337214	Office furniture and custom architectural woodwork and millwork manufacturing	0.00	0.00	3.97	1.32	7.2%	\$39,602
337215	Showcase, partition, shelving, and locker manufacturing	0.00	0.00	0.00	0.00	0.0%	N/A
33792	Blind and shade manufacturing	0.15	2.53	1.93	1.70	400.0%	\$41,459

Table 11 - Economic Region Industry Cluster Concentration, Growth and Average Wage

NAICS	Description	Bullhead City LQ	Kingman LQ	Lake Havasu City LQ	Mohave County LQ	Mohave County Growth (2005-2009)	Mohave County Average Annual Wage
Mining							
2121	Coal mining	0.38	1.95	1.08	2.20	NEW	\$103,707
21221	Iron ore mining	0.00	0.00	0.00	0.00	0.0%	N/A
21222,	Gold, silver, and other metal ore mining	0.00	0.00	0.00	0.00	0.0%	N/A
21229							
21223	Copper, nickel, lead, and zinc mining	0.00	0.00	0.00	1.61	779.2%	\$62,049
21231	Stone mining and quarrying	0.00	0.17	0.00	0.17	300.0%	\$75,783
21232	Sand, gravel, clay, and ceramic and refractory minerals mining and quarrying	0.47	1.13	0.00	0.64	-56.8%	\$53,295
21239	Other nonmetallic mineral mining and quarrying	0.85	2.68	1.49	3.01	16.0%	\$53,107
213111	Drilling oil and gas wells	0.80	1.27	1.32	1.31	300.0%	\$63,548
213112	Support activities for oil and gas operations	0.00	0.00	0.00	0.00	0.0%	N/A
213113-5	Support activities for other mining	1.39	2.22	2.29	2.29	NEW	\$87,034
Motorsports							
33271	Machine shops	0.00	11.52	1.87	4.81	86.9%	\$68,963
332997-9	Other fabricated metal manufacturing	0.00	0.00	1.88	0.62	-63.2%	\$46,069
3363,	Motor vehicle parts manufacturing	0.00	0.00	1.13	0.37	-50.0%	\$39,250
336322							
335991	Carbon and graphite product manufacturing	1.82	30.09	22.91	20.20	400.0%	\$38,318
336991	Motorcycle, bicycle, and parts manufacturing	0.00	0.77	4.88	1.90	NEW	\$32,396
441	Retail - Motor vehicle and parts	0.98	1.80	1.74	1.65	-22.0%	\$46,707
81111-2,	Automotive repair and maintenance, except car washes	1.31	2.07	1.99	2.06	-23.2%	\$37,738
811191,							
811198							
811192	Car washes	1.32	6.12	1.74	3.45	11.1%	\$18,941
Transportation and Logistics							
481	Air transportation	0.02	0.03	0.01	0.02	0.0%	\$121,696
482	Rail transportation	1.43	2.01	2.08	2.07	0.0%	\$106,430
484	Truck transportation	0.09	2.86	0.60	1.28	-25.4%	\$45,614
485	Transit and ground passenger transportation	2.13	0.00	0.26	0.92	44.9%	\$20,927
486	Pipeline transportation	1.00	5.12	0.00	5.68	17.5%	\$133,673
492	Couriers and messengers	1.11	1.78	2.36	1.97	31.4%	\$17,533
493	Warehousing and storage	0.14	1.02	0.00	0.44	8.3%	\$27,490

Source: Bureau of Labor Statistics, Quarterly Census of Employment and Wages (QCEW); IMPLAN; ESI Corp

CLUSTER OCCUPATIONS

The final list of industry clusters were further analyzed to identify the key occupations associated with each cluster. This analysis included the identification of the occupations that comprise the majority of the workforce within each industry cluster, along with the occupational growth projection from 2008 to 2018. These findings can be used to understand which occupational segments are growing and should become the attention of education and workforce development professionals to help build a talent pipeline to support businesses within the region and aid in recruitment.

Table 12 provides the list of industry clusters and their associated occupations. When examining this list, some commonalties emerge relating to the occupations within each cluster. For example, within the health care field, the knowledge, skills and abilities relating to information technology and data processing, will be similar to those occupations within the Information Technology cluster.

The Cluster Occupations are listed by Standard Occupation Classification (SOC) number, which is the system used by Federal statistical agencies to classify workers into occupational categories for the purpose of collecting, calculating, or disseminating data. All workers are classified into one of 840 detailed occupations according to their occupational definition. To facilitate classification, detailed occupations are combined to form 461 broad occupations, 97 minor groups, and 23 major groups. Detailed occupations in the SOC with similar job duties, and in some cases skills, education, and/or training, are grouped together.

Table 12 - Industry Cluster Occupations

SOC Code	Occupation	Mohave County Average Annual Salary (2009)	Arizona Projected Growth (2008-2018)
Arts and Entertainment Cluster			
Recreation Industries (amusement parks, casinos and arcades):			
39-3011	Gaming Dealers	N/A	20.4%
39-3091	Amusement and Recreation Attendants	N/A	6.9%
39-6021	Tour Guides and Escorts	\$31,728	4.2%
Transportation (water transportation, scenic and sightseeing transportation and support activities):			
39-6021	Tour Guides and Escorts	\$31,728	4.2%
53-6099	Transportation Workers, All Other	N/A	10.2%
Fitness and Recreational Sports (boating, fitness centers):			
39-3091	Amusement and Recreation Attendants	N/A	6.9%
39-9031	Fitness Trainers and Aerobics Instructors	\$30,539	20.3%
39-3093	Locker Room, Coatroom, and Dressing Room Attendants	N/A	3.3%
Lodging (hotels, motels):			
43-4081	Hotel, Motel, and Resort Desk Clerks	\$20,594	7.3%
39-6012	Concierges	N/A	5.4%
39-6011	Baggage Porters and Bellhops	N/A	1.0%
Retail and Food Services:			
35-1012	First-Line Supervisors/Managers of Food Preparation and Serving Workers	\$26,690	10.1%
41-3011	Advertising Sales Agents	\$42,900	6.4%
41-2011	Cashiers	\$20,507	8.4%
41-2031	Retail Salespersons	\$25,716	9.5%
35-2014	Cooks, Restaurant	\$21,185	10.0%
35-3011	Bartenders	\$17,592	10.8%
35-3031	Waiters and Waitresses	\$18,045	10.4%
Motion Picture and Video Production:			
13-1011	Agents and Business Managers of Artists, Performers, and Athletes	N/A	5.7%
39-3092	Costume Attendants	N/A	12.3%
Spectator Sports			
27-2021	Athletes and Sports Competitors	N/A	4.6%
27-2099	Entertainers and Performers, Sports and Related Workers, All Other	N/A	6.8%
13-1011	Agents and Business Managers of Artists, Performers, and Athletes	N/A	5.7%
Performing Arts			
27-2099	Entertainers and Performers, Sports and Related Workers, All Other	N/A	6.8%
13-1011	Agents and Business Managers of Artists, Performers, and Athletes	N/A	5.7%
Parks, Museums and Historical Sites			
19-3091	Anthropologists and Archeologists	N/A	9.9%
25-4013	Museum Technicians and Conservators	N/A	17.1%
39-6021	Tour Guides and Escorts	\$31,728	4.2%

Table 12 - Industry Cluster Occupations

SOC Code	Occupation	Mohave County Average Annual Salary (2009)	Arizona Projected Growth (2008-2018)
Aviation			
Repair and Maintenance (machine shops, plastics, rubber and metal fabrication)			
49-1011	First-Line Supervisors/Managers of Mechanics, Installers, and Repairers	\$56,194	-1.2%
49-2094	Electrical and Electronics Repairers, Commercial and Industrial Equipment	N/A	4.2%
49-9041	Industrial Machinery Mechanics	\$41,128	10.6%
Machinery (fluid power, air purification and ventilation)			
51-1011	First-Line Supervisors/Managers of Production and Operating Workers	\$48,398	-5.5%
51-2099	Assemblers and Fabricators, All Other	\$22,770	-4.1%
51-9041	Extruding, Forming, Pressing, and Compacting Machine Setters, Operators, and Tenders	N/A	13.2%
Aircraft Restoration (plastics, rubber and metal fabrication)			
17-2011	Aerospace Engineers	N/A	9.5%
17-2131	Materials Engineers	N/A	8.1%
17-3024	Electro-Mechanical Technicians	N/A	4.9%
49-9041	Industrial Machinery Mechanics	\$41,128	10.6%
51-2011	Aircraft Structure, Surfaces, Rigging, and Systems Assemblers	N/A	14.1%
51-9041	Extruding, Forming, Pressing, and Compacting Machine Setters, Operators, and Tenders	N/A	13.2%
Electronic Assembly (circuit boards)			
51-1011	First-Line Supervisors/Managers of Production and Operating Workers	\$48,398	-5.5%
51-2099	Assemblers and Fabricators, All Other	\$22,770	-4.1%
51-4011	Computer-Controlled Machine Tool Operators, Metal and Plastic	N/A	-3.2%
51-9141	Semiconductor Processors	N/A	-0.7%
Storage (hangars, tie downs)			
43-5011	Cargo and Freight Agents	N/A	18.0%
53-2022	Airfield Operations Specialists	N/A	8.4%
Commercial Air Service			
39-6032	Transportation Attendants, Except Flight Attendants and Baggage Porters	N/A	4.9%
53-2012	Commercial Pilots	\$61,840	13.5%
53-2022	Airfield Operations Specialists	N/A	8.4%
Energy			
Electric Power (generation (solar, wind, biomass), transmission and distribution)			
49-2095	Electrical and Electronics Repairers, Powerhouse, Substation, and Relay	N/A	37.1%
51-2041	Structural Metal Fabricators and Fitters	\$36,659	-15.0%
51-8012	Power Distributors and Dispatchers	N/A	22.8%
51-8013	Power Plant Operators	N/A	13.6%

Table 12 - Industry Cluster Occupations

SOC Code	Occupation	Mohave County Average Annual Salary (2009)	Arizona Projected Growth (2008-2018)
Healthcare Services			
Medical Providers (hospitals and doctor offices)			
11-9111	Medical and Health Services Managers	\$65,844	14.5%
29-1031	Dietitians and Nutritionists	\$62,239	6.3%
29-1071	Physician Assistants	\$78,926	33.9%
29-1111	Registered Nurses	\$61,584	23.5%
29-2021	Dental Hygienists	\$79,136	32.4%
29-2041	Emergency Medical Technicians and Paramedics	\$29,439	19.3%
Home Healthcare (nursing and residential care facilities)			
31-1011	Home Health Aides	\$20,896	38.9%
29-9099	Healthcare Practitioners and Technical Workers, All Other	\$25,801	17.5%
39-9021	Personal and Home Care Aides	N/A	27.5%
Medical and Diagnostic Labs			
29-2012	Medical and Clinical Laboratory Technicians	\$40,526	18.4%
29-2052	Pharmacy Technicians	\$27,594	32.2%
17-2031	Biomedical Engineers	N/A	54.8%
Veterinary Services			
29-1131	Veterinarians	\$92,390	N/A
29-2056	Veterinary Technologists and Technicians	\$26,949	22.9%
31-9096	Veterinary Assistants and Laboratory Animal Caretakers	\$18,979	11.3%
Information Technology			
Data Center and Storage (data processing and hosting)			
29-2071	Medical Records and Health Information Technicians	\$32,345	16.6%
15-1011	Computer and Information Scientists, Research	N/A	7.7%
Software design and publishing (computer programming)			
15-1011	Computer and Information Scientists, Research	N/A	7.7%
15-1031	Computer Software Engineers, Applications	N/A	15.1%
15-1032	Computer Software Engineers, Systems Software	\$93,242	14.4%
Telecommunications (ISP, equipment rental and leasing)			
15-1071	Network and Computer Systems Administrators	\$53,521	8.4%
15-1081	Network Systems and Data Communications Analysts	\$59,105	40.6%

Table 12 - Industry Cluster Occupations

SOC Code	Occupation	Mohave County Average Annual Salary (2009)	Arizona Projected Growth (2008-2018)
Manufacturing			
Watercraft (plastics and rubber, metal fabrication, wood products, and paint and coating)			
51-1011	First-Line Supervisors/Managers of Production and Operating Workers	\$48,398	-5.5%
51-4041	Machinists	\$39,145	-5.4%
51-4199	Metal Workers and Plastic Workers, All Other	N/A	N/A
51-6093	Upholsterers	N/A	4.1%
51-9122	Painters, Transportation Equipment	\$32,393	4.4%
Telecommunications Equipment (electronic assembly and telephone apparatus)			
51-1011	First-Line Supervisors/Managers of Production and Operating Workers	\$48,398	-5.5%
51-2099	Assemblers and Fabricators, All Other	\$22,770	-4.1%
51-4011	Computer-Controlled Machine Tool Operators, Metal and Plastic	N/A	-3.2%
51-9141	Semiconductor Processors	N/A	-0.7%
Sporting Goods			
51-1011	First-Line Supervisors/Managers of Production and Operating Workers	\$48,398	-5.5%
51-2099	Assemblers and Fabricators, All Other	\$22,770	-4.1%
51-4011	Computer-Controlled Machine Tool Operators, Metal and Plastic	N/A	-3.2%
51-4199	Metal Workers and Plastic Workers, All Other	N/A	N/A
51-6062	Textile Cutting Machine Setters, Operators, and Tenders	N/A	6.4%
Transportation Equipment (Truck trailer, Travel trailer, and Railroad rolling stock)			
51-1011	First-Line Supervisors/Managers of Production and Operating Workers	\$48,398	-5.5%
51-4041	Machinists	\$39,145	-5.4%
51-4199	Metal Workers and Plastic Workers, All Other	N/A	N/A
51-6093	Upholsterers	N/A	4.1%
51-9122	Painters, Transportation Equipment	\$32,393	4.4%
Electronic Equipment (telephone apparatus, audio and video equipment, circuit board)			
17-3023	Electrical and Electronic Engineering Technicians	\$52,161	1.6%
51-1011	First-Line Supervisors/Managers of Production and Operating Workers	\$48,398	-5.5%
51-2099	Assemblers and Fabricators, All Other	\$22,770	-4.1%
51-9141	Semiconductor Processors	N/A	-0.7%
Construction Products (truss, pipe, prefabricated wood, cabinets, machinery, cut stone, asphalt)			
51-1011	First-Line Supervisors/Managers of Production and Operating Workers	\$48,398	-5.5%
51-9198	Helpers--Production Workers	\$25,581	-4.0%
51-9199	Production Workers, All Other	\$20,635	-3.0%
Machinery (fluid power, air purification and ventilation)			
51-1011	First-Line Supervisors/Managers of Production and Operating Workers	\$48,398	-5.5%
51-2099	Assemblers and Fabricators, All Other	\$22,770	-4.1%
51-9041	Extruding, Forming, Pressing, and Compacting Machine Setters, Operators, and Tenders	N/A	13.2%
Mining			
47-5049	Mining Machine Operators, All Other	N/A	N/A
47-5099	Extraction Workers, All Other	N/A	N/A
19-4041	Geological and Petroleum Technicians	\$64,660	11.4%
17-2151	Mining and Geological Engineers, Including Mining Safety Engineers	\$58,922	8.6%

Table 12 - Industry Cluster Occupations

SOC Code	Occupation	Mohave County Average Annual Salary (2009)	Arizona Projected Growth (2008-2018)
Motorsports			
Motor Vehicle and Bicycle Parts Manufacturing (electronic assembly, metal fabrication, plastics, carbon and graphite)			
51-1011	First-Line Supervisors/Managers of Production and Operating Workers	\$48,398	-5.5%
51-4011	Computer-Controlled Machine Tool Operators, Metal and Plastic	N/A	-3.2%
51-4041	Machinists	\$39,145	-5.4%
51-9022	Grinding and Polishing Workers, Hand	\$27,101	-4.9%
51-4199	Metal Workers and Plastic Workers, All Other	N/A	N/A
Motor Vehicle Restoration (parts, metal fabrication, machine shops, plastics, carbon and graphite materials)			
49-1011	First-Line Supervisors/Managers of Mechanics, Installers, and Repairers	\$56,194	-1.2%
51-2031	Engine and Other Machine Assemblers	N/A	N/A
51-2099	Assemblers and Fabricators, All Other	\$22,770	-4.1%
51-4199	Metal Workers and Plastic Workers, All Other	N/A	N/A
Auto and Motorcycle Repair and Maintenance (personal services)			
49-1011	First-Line Supervisors/Managers of Mechanics, Installers, and Repairers	\$56,194	-1.2%
49-2093	Electrical and Electronics Installers and Repairers, Transportation Equipment	N/A	0.6%
49-3023	Automotive Service Technicians and Mechanics	\$35,644	2.0%
Motor vehicle parts (retail)			
41-2011	Cashiers	\$20,507	8.4%
41-2031	Retail Salespersons	\$25,716	9.5%
Transportation and Logistics			
Warehousing (storage)			
11-3071	Transportation, Storage, and Distribution Managers	\$71,237	-6.6%
53-1021	First-Line Supervisors/Managers of Helpers, Laborers, and Material Movers, Hand	\$37,217	3.5%
53-7199	Material Moving Workers, All Other	N/A	-6.2%
Freight hauling (air, rail, truck)			
13-1081	Logisticians	N/A	13.5%
43-5011	Cargo and Freight Agents	N/A	18.0%
53-1011	Aircraft Cargo Handling Supervisors	N/A	-12.0%
53-4031	Railroad Conductors and Yardmasters	N/A	8.8%
53-6051	Freight and Cargo Inspectors	N/A	12.7%
53-6099	Transportation Workers, All Other	N/A	10.2%

Source: ESI Corp. 2011; Arizona Department of Commerce, Research Administration in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics, November 2010; O-NET Online (<http://www.onetonline.org/>) accessed May 23 & 26, 2011

4. SITE SUITABILITY ANALYSIS

A number of site location factors are taken into consideration by business and industry as they conduct their due diligence when identifying new business locations around the country. In order to assist Mohave County and its regional economic development partners with their attraction efforts, ESI Corp has created industry cluster site suitability profiles highlighting the key site location factors and how they rate in importance to the respective industry. These site location factors and criteria were compiled from several resources including industry publications, internet research, and ESI Corp's institutional knowledge from past experience. Site location factors by industry cluster were compiled to assist the County and its economic development stakeholders in understanding their key strengths that can be leveraged to successfully market Mohave County.

As each Economic Region prepares for and implements their own economic development policies and programs it will be increasingly important to assess their own strengths and weaknesses based upon each specific industries key site location requirements. The following tables provide a stepping stone into this assessment. For each industry cluster, the site location criteria were categorized into three areas: operating costs, operating conditions and quality of life. Each site location factor was rated as "critically important," "very important," "important," or "not important."

Table 13 - Industry Clusters Site Selection Criteria

Critical Importance	Very Important	Important	Not Important
Healthcare			
Operating Costs:			
Site/Building	Electricity	Personal Income Tax	Gas
Wages/Fringe Benefits	Water/Sewer		Incentives
Telecommunications			
Operating Conditions:			
Technical Labor Availability	Market Accessible Location (Demographics)	Established Cluster	
Skilled Labor Availability	Vocational Education	Broadband Access	
High Speed Internet Access	Proximity to education & training programs		
Growing Population			
Professional-Managerial Labor Supply			
Quality of Life:			
Educational System	Cultural Amenities	Recreation	
	Cost of Living		
Energy (Solar, Wind & Biomfuels) Production and Distribution			
Operating Costs:			
Spacious and Development-Ready Site	Tax Exemptions	Electric Power	Telecommunications
Incentives	Expedited Permitting		
Wind/Solar variability	Water/Sewer (Biofuels)		
Feedstock Availability & Cost (Biofuels)			
Operating Conditions:			
Skilled Labor Availability	Vocational Education	Public Permitting	
Technical Labor Availability	Conducive Government Regulations	Established Chemical Ind (Biofuels)	
Proximity to the Electric Grid	Community Concerns/Support		
Consistent Energy Supply	Market Accessible Location		
Professional-Managerial Labor Supply	Rail Access for Feedstock (Biofuels)		
	Highway Access		
Quality of Life:			
Available and Affordable Housing	Cultural Amenities	Recreation	
Educational System	Cost of Living		

Table 13 - Industry Clusters Site Selection Criteria

Critical Importance	Very Important	Important	Not Important
Transportation and Logistics			
Operating Costs:			
Gas Prices	Electric Power	Personal Income Tax	Water/Sewer
Wages/Fringe Benefits	Corporate Income Tax	Incentives	
Transportation Costs	Equipment Tax		
Site/Building			
Operating Conditions:			
Proximity to Rail	Low Disaster Risk	Government Regulations	
Proximity to Highway Systems	Skilled Labor Supply		
Proximity to Markets	Professional-Managerial Labor Supply		
Technical Labor Supply			
Professional-Managerial Labor Supply			
Quality of Life:			
Educational System	Available and Affordable Housing	Recreation	
Aviation			
Operating Costs:			
Wages/Fringe Benefits	Gas	Personal Income Tax	Water/Sewer
Electric Power	Site/Building	Corporate Income Tax	
Equipment Tax	Transportation	Incentives	
Operating Conditions:			
Technical Labor Supply	Proximity to Air-fields/Airports	Proximity to Market	
Skilled Labor Supply			
Vocational Education			
Quality of Life:			
Educational System	Available and Affordable Housing	Recreation	

Table 13 - Industry Clusters Site Selection Criteria

	Critical Importance	Very Important	Important	Not Important
Motorsports				
Operating Costs:				
Wages and Fringe Benefits		Gas	Corporate Income Tax	
Equipment Tax		Transportation	Incentives	
Electric Power		Site/Building	Water/Sewer	
Operating Conditions:				
Technical Labor Supply		Highway Access	Government Regulation	Rail Service
Vocational Education		Proximity to Market		
Skilled Labor Supply				
Quality of Life:				
Educational System		Available and Affordable Housing	Recreation	
Information Technology				
Operating Costs:				
Clerical-Managerial Salaries		Personal Income Tax	Corporate Income Tax	Transportation
Lease Rates		Site/Building		
Fiber optic Internet		Incentives		
Electric Power				
Operating Conditions:				
High Speed Internet Access		Vocational Education	Highway Access	
Professional-Managerial Labor Supply		Fiber Optic Providers	Air Service	
Broadband Access		Low Disaster Risk		
Technical Labor Availability				
Redundant Power Infrastructure				
Quality of Life:				
Available and Affordable Housing		Cultural Amenities	Recreation	
Educational System		Cost of Living		

Table 13 - Industry Clusters Site Selection Criteria

	Critical Importance	Very Important	Important	Not Important
Manufacturing				
Operating Costs:				
Wages and Fringe Benefits			Personal Income Tax	Water/Sewer
Electric Power		Gas	Corporate Income Tax	
Equipment Tax		Site/Building	Incentives	
		Transportation Costs		
Operating Conditions:				
Technical Labor Supply		Skilled Labor Supply	Air Service	Rail Service
Vocational Education		Highway Access	Government Regulations	Proximity to Related Universities
Consistent Electric Power		High Speed Internet Access	Rail (depends on company)	Proximity to Research Facilities
Redundant Power Infrastructure				
Quality of Life:				
Educational System		Available and Affordable Housing	Recreation	

5. COMPETITIVE ANALYSIS

When comparing the attractiveness of one community over another one, companies evaluate many site location criteria, including the cost of doing business. Due to the importance of being and staying competitive, an analysis of key costs was undertaken comparing the three Mohave County cities with three competitor cities: Casa Grande, AZ, Henderson, NV and St. George, UT. The cost comparison analysis included an assessment of the following:

- Land costs for industrial and office uses
- Lease rates for industrial and office buildings
- Construction costs for industrial and office buildings
- Wage rates for selected occupations
- Utility rates for natural gas and electric
- Property tax rates

LAND AND BUILDING COSTS

In the industrial sector, land costs vary greatly among the communities with St. George, UT maintaining the lowest cost per acre. The lease costs are relatively the same in all the communities of Mohave County as seen in Table 14, however, these costs are lower in the competing cities. Construction costs are relatively the same in Mohave County, which are similar to Casa Grande, lower than Henderson, and more than St. George. Quotes for land costs reflect improved and unimproved parcels.

Table 14 – Industrial Land and Building Costs

	Land Cost (acre) ₁	Lease Rate (sq.ft./month) ₂	Construction Cost (sq.ft.) ₃
Bullhead City, AZ	\$15,000-75,000	\$0.25 - \$0.58	\$50 - \$60
Kingman, AZ	\$8,000-\$130,000	\$0.25 - \$0.50	\$70 - \$90
Lake Havasu City, AZ	\$152,000-\$240,000	\$0.25 - \$0.50	\$60 - \$65
Casa Grande, AZ	\$80,000	\$0.50 - \$0.58	\$70 - \$95
Henderson, NV	\$180,000	\$0.60	\$85 - \$110
St. George, UT	\$50,000 - \$60,000	\$0.30 - \$0.80	\$40 - \$55

Bullhead City Source: **1,2,3** - First American Investment, Elio Khalife, 05-19-11

Kingman Source: **1,2** - Hollingsworth Properties, David Hollingsworth, 05-19-11; **3** - www.reedconstructiondata.com accessed 06.27.11

Lake Havasu City Sources: **1,2,3** - Mohave Realty, Mike Dagon, 05-27-11; Carl Flusche ,07-7-11

Casa Grande Source: **1,2** - CoStar (2009 thru 2011 data) accessed 05.12.11;**3** - www.reedconstructiondata.com accessed 06.27.11

Henderson Source: **1,2** - CoStar (all years) accessed 05.12.11;**3** - www.reedconstructiondata.com accessed 06.27.11

St. George Sources: **1,2** - Bob Richards & Associates, Paul, 05-25-11;**3** - Commerce Real Estate Solutions, Travis J. Parry

Table 15 – Office Land and Building Costs

	Land Cost (Acre)₁	Lease Rate (sq.ft./month)₂	Construction Cost (sq.ft.)₃
Bullhead City, AZ	\$43,560 - \$348,480	\$0.70-\$1.00	\$100 - \$140
Kingman, AZ	\$35,000 - \$130,000	\$0.81	\$100 - \$140
Lake Havasu City, AZ	\$260,000 - \$426,500	\$0.75-\$1.00	\$100 - \$140
Casa Grande, AZ	\$80,000	\$1.38	\$105 - \$145
Henderson, NV	\$170,000 - \$800,000	\$1.51	\$125 - \$170
St. George, UT	\$50,000 - \$60,000	\$0.93	\$60 - \$75

Bullhead City Source: **1** - First American Investment, Elio Khalife, 05-19-11

Kingman Source: **1** - Hollingsworth Properties, David Hollingsworth, 05-19-11

Lake Havasu City Sources: **1** - Mohave Realty, Mike Dagon, 05-27-11; Carl Flusche, 07-6-11

Casa Grande Source: **1**- CoStar (2009 thru 2011 data) accessed 05.12.11

Henderson Source: **1** -CoStar (2009 thru 2011 data) accessed 05.12.11; **2** - Desert Sun Realty, Nate, 05-25-11

St. George Sources: **1** - Bob Richards & Associates, Paul, 05-25-11; **3** - Commerce Real Estate Solutions, Travis J. Parry

2 - CoStar – Average of the average weighted lease rate.

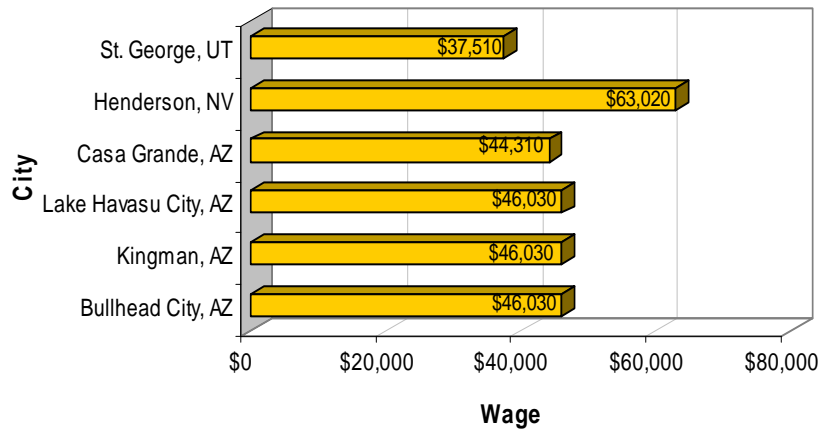
3 - www.reedconstructiondata.com accessed 06.27.11. Kingman construction costs applied to Bullhead and Lake Havasu.

Similar to the industrial sector, the land costs in the office sector vary greatly among the cities. In contrast, the lease costs for office space does not vary significantly, however, the cost is higher in the communities of Mohave County than it is in the competing cities. Construction costs are the same for the industrial and office sector. Construction costs are very similar between Mohave County communities, however, exceed St. George, and are below Henderson.

WAGES

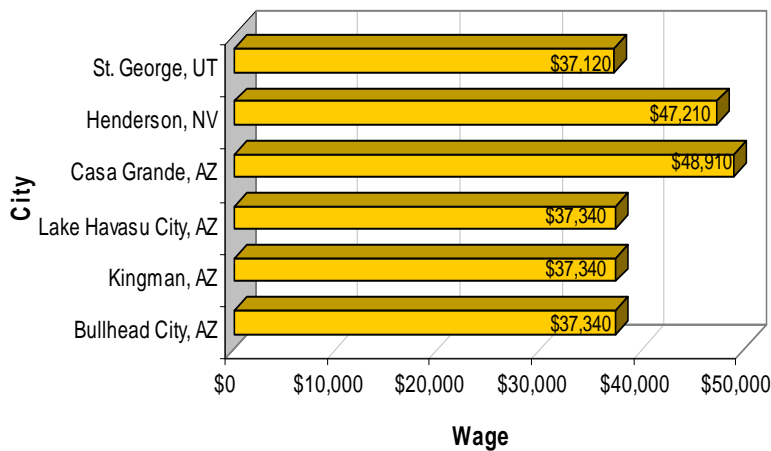
Labor costs are typically one of the highest operating expenses of a business and are an ongoing cost of doing business. Wage rates for selected occupations were compared amongst our peer cities to the competitor cities. The following charts display the annualized wage rates from the Bureau of Labor Statistics for the selected occupations.

Chart 1 – Plumbers, Pipefitters, and Steamfitters Wages



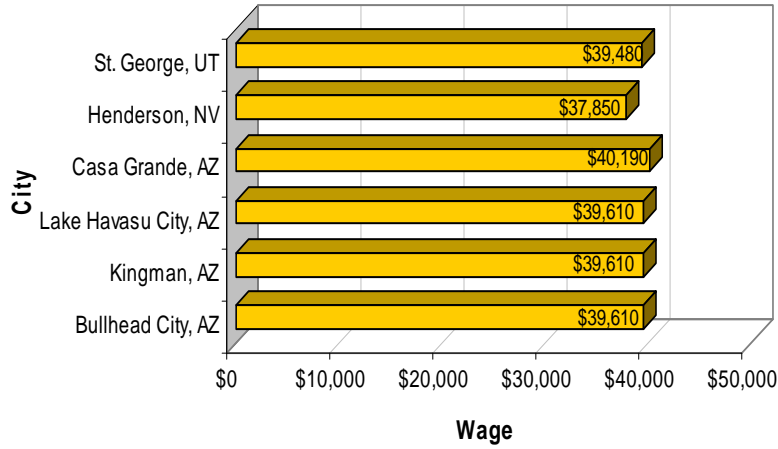
- The wages of plumbers, pipefitters, and steamfitters in the communities of Mohave County are 36.7% less than those in Henderson, NV, and 18.5% more than those in St. George, UT, and 3.7% more than those in Casa Grande, AZ

Chart 2 – Computer Support Specialists



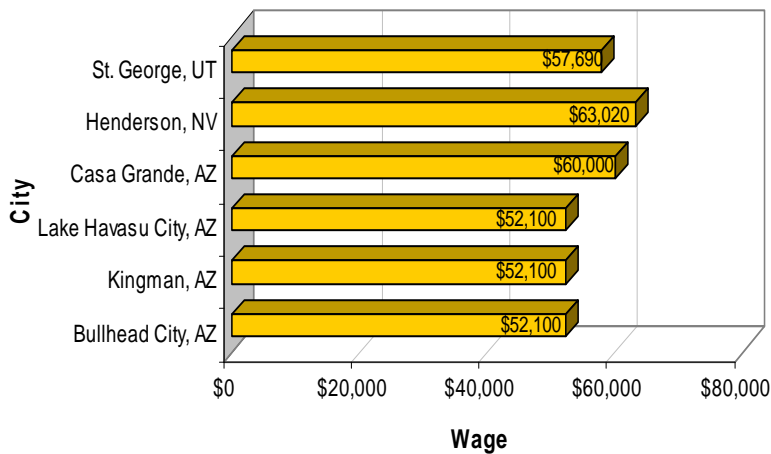
- The wages of computer support specialists in the communities of Mohave County are 31% lower than those in Casa Grande, AZ, 26.4% less than those in Henderson, NV, and 0.6% higher than those in St. George, UT

Chart 3 – Machinists



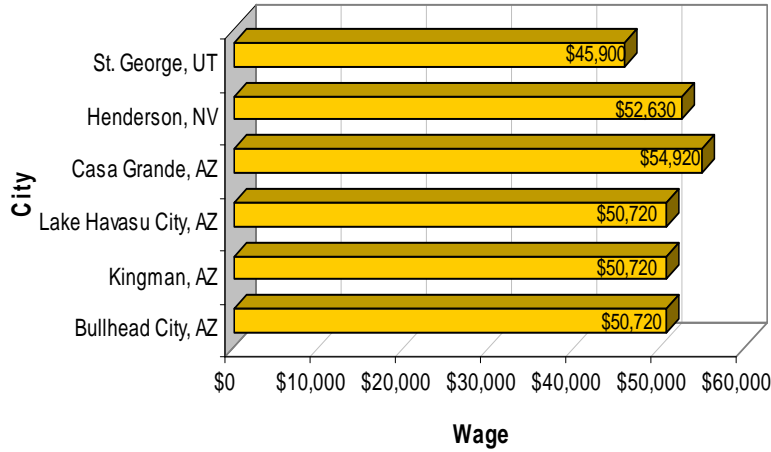
- The wages of machinists in the communities of Mohave County are 1.4% lower than those in Casa Grande, AZ, 4.4% higher than those in Henderson, NV, and 0.3% more than those in St. George, NV

Chart 4 – First-Line Supervisors of Mechanics, Installers, & Repairers



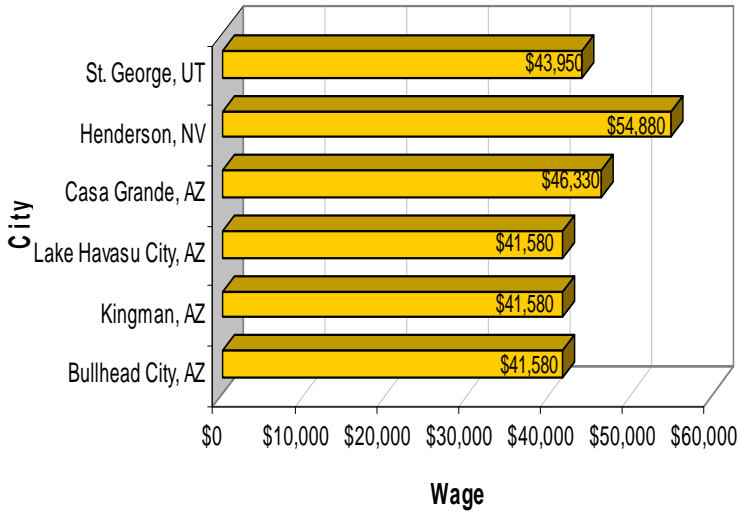
- The wages of first-line supervisors of mechanics, installers, and repairers in the communities of Mohave County are 17.3% lower than those in Henderson, NV, 13.2% lower than those in Casa Grande, AZ, and 9.7% lower than those in St. George, UT

Chart 5 – First-Line Supervisors of Production & Operating Workers



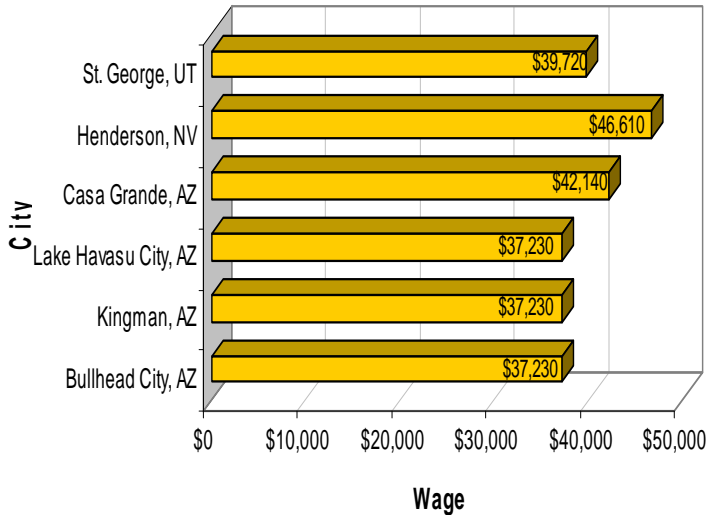
- The wages of first-line supervisors of production and operating workers in the communities of Mohave County are 7.6% lower than those in Casa Grande, AZ, 3.6% less than those in Henderson, NV, and 9.5% higher than those in St. George, UT

Chart 6 – Industrial Machinery Mechanics



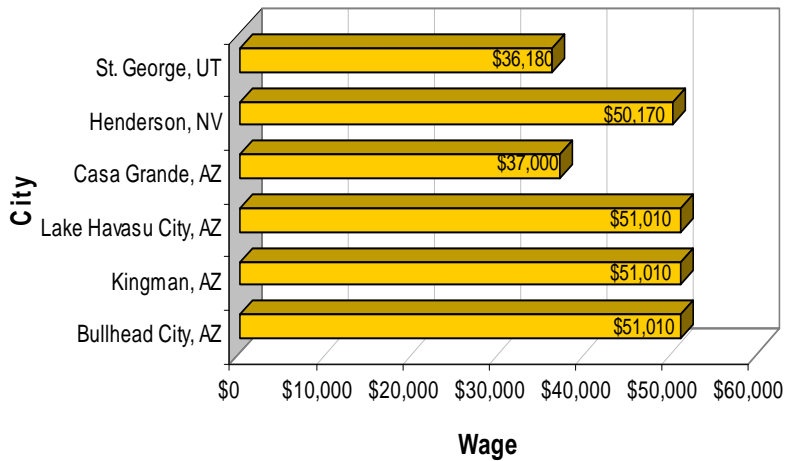
- The wages of industrial machinery mechanics in the communities of Mohave County are 24.2% lower than those in Henderson, NV, 10.3% less than those in Casa Grande, AZ, and 5.4% less than those in St. George, UT

Chart 7 – Installation, Maintenance, and Repair Occupations



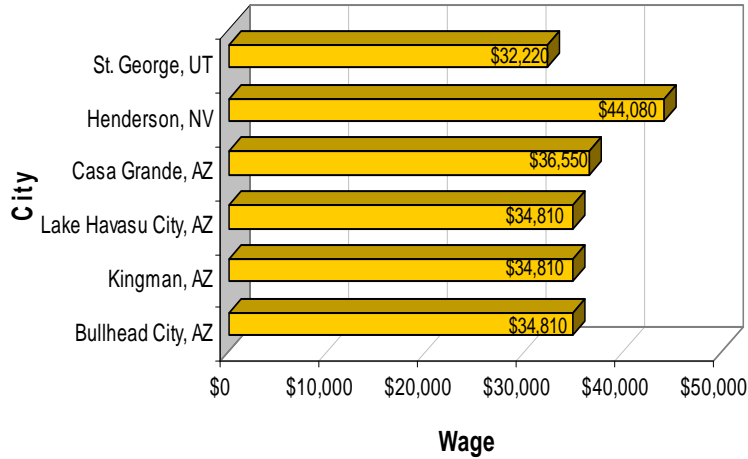
- The wages of installation, maintenance, and repair occupations in the communities in Mohave County are 20.1% less than those in Henderson, NV, 11.7% lower than those in Casa Grande, AZ, and 6.3% less than those in St. George, UT

Chart 8 – Welders, Cutters, Solderers, and Brazers



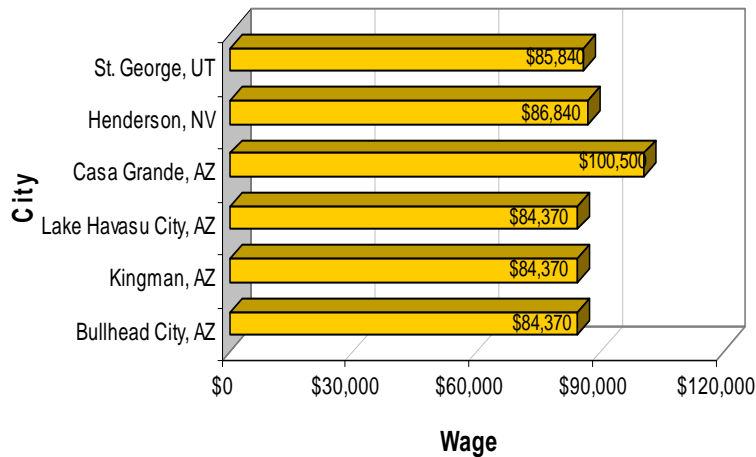
- The wages of welders, cutters, solderers, and brazers in the communities of Mohave County are 1.6% more than those in Henderson, NV, 27.5% higher than those in Casa Grande, AZ, and 29% higher than those in St. George, UT

Chart 9 – Maintenance and Repair Workers, General



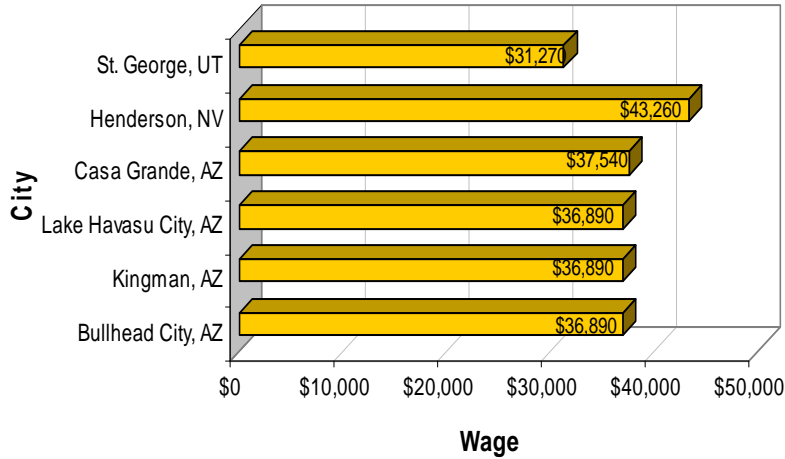
- The wages of general maintenance and repair workers in the communities of Mohave County are 21% lower than those in Henderson, NV, 4.8% less than those in Casa Grande, AZ, and 7.4% more than those in St. George, UT

Chart 10 – Sales Managers



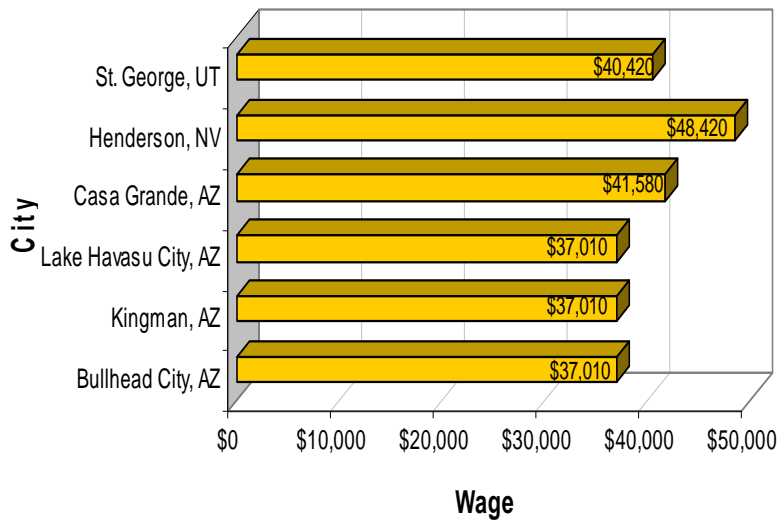
- The wages of sales managers in the communities of Mohave County are 16% lower than those in Casa Grande, AZ, 2.8% less than those in Henderson, NV, and 1.7% lower than those in St. George, UT

Chart 11 – Computer Controlled Machine Tool Operators, Metal and Plastic



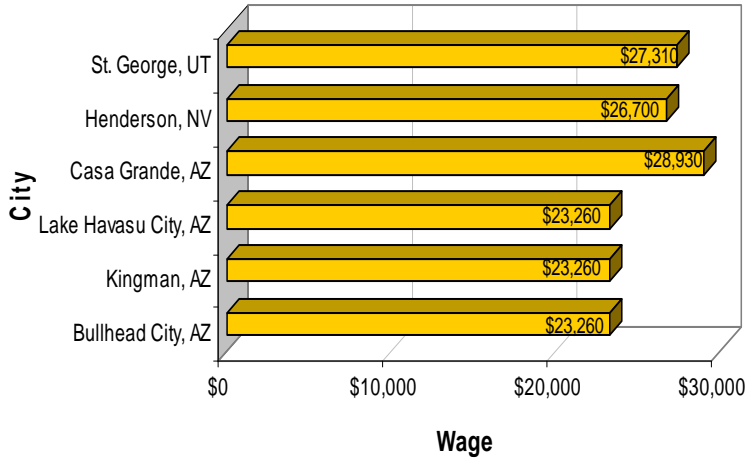
- The wages of computer controlled machine tool operators in the communities of Mohave County are 14.7% lower than those in Henderson, NV, 1.7% less than those in Casa Grande, AZ, and 15.2% higher than those in St. George, UT

Chart 12 – Heavy and Tractor – Trailer Truck Drivers



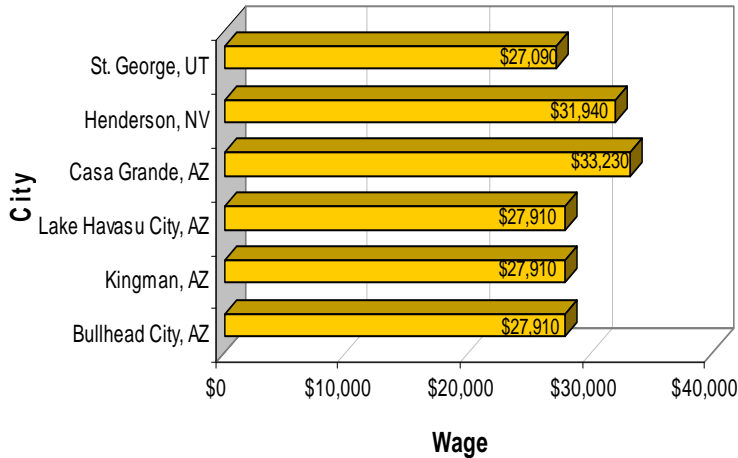
- The wages of heavy and tractor-trailer truck drivers in the communities of Mohave County are 23.6% lower than those in Henderson, NV, 11% lower than those in Casa Grande, AZ, and 8.4% less than those in St. George, UT

Chart 13 – Data Entry Keyers



- The wages of data entry keyers in the communities of Mohave County are 16% less than those in Casa Grande, AZ, 14.8% lower than those in St. George, UT, and 12.9% less than those in Henderson, NV

Chart 14 – Customer Service Representatives



- The wages of customer service representatives in the communities of Mohave County are 16% lower than those in Casa Grande, AZ, 12.6% less than those in Henderson, NV, and 2.9% higher than those in St. George, UT

UTILITY RATES

Natural gas rates were another important factor that was compared and analyzed in the competitive market analysis. Although Southwest Gas provides gas for Bullhead City, Casa Grande, and Henderson, they have different rates. Bullhead City and Casa Grande have higher rates because they are located within Arizona and Henderson has lower rates because it is located in the Southern region of Nevada.

Table 16 – Natural Gas Rates

	Small		Large	
	Basic Charge (per month)	Delivery Charge (per therm)	Basic Charge (per month)	Delivery Charge (per therm)
Bullhead City, AZ	\$27.50	\$0.57	\$160	\$0.29
Kingman, AZ	\$15.50	\$0.25	\$105	\$0.10
Lake Havasu City, AZ	\$15.50	\$0.25	\$105	\$0.10
Casa Grande, AZ	\$27.50	\$0.57	\$160	\$0.29
Henderson, NV	\$21.50	\$0.34	\$150	\$0.18
St. George, UT	\$21.00	\$0.72	\$244	\$0.72

Bullhead City, Casa Grande, and Henderson Source: Southwest Gas. 04-01-11

Kingman and Lake Havasu City Source: UniSource Energy Services, 04-01-10

UniSource Energy Services provides gas service for Kingman and Lake Havasu City and they possess the same gas rates. Bullhead City has both a higher basic charge per month and a higher delivery charge per therm than Kingman and Lake Havasu City despite being in Mohave County. Therefore it can be concluded that the price of natural gas has to do with both location and service provider, Southwest Gas being the more expensive provider in Arizona. Questar Gas is the provider for St. George, UT and was the highest cost provider analyzed.

Table 1 – Small Commercial/Industrial Electric User

	basic/month¹	Demand/kW²	Energy Charge/kWh
Bullhead City, AZ	\$25.00 (\$12.00 ³)	\$8.25 ⁴	\$0.05374 (0.08160 ³)
Kingman, AZ	\$12.50	N/A	\$0.027(400), \$0.038691 ⁵
Lake Havasu City, AZ	\$12.50	N/A	\$0.027(400), \$0.038691
Casa Grande, AZ	\$8.07	\$9.33(100);\$4.797 ⁶	\$0.095(200); \$0.052 ⁷
Henderson, NV	\$14.90	\$3.92	\$0.07061
St. George, UT	\$8.73	\$7.82(+5) ⁸	\$0.12(500), \$0.07(9500), \$0.04 ⁹

Bullhead City Source: Mohave Electric Cooperative, 5-25-11

Kingman and Lake Havasu City Source: UniSource Energy Services, 10-01-10

Casa Grande Source: APS Rate Schedule, 01-01-10

Henderson Source: NV Energy, 4-02-11

St. George Source: <http://www.sgcity.org/utilities/rates.php>, 05-25-11

¹ Basic/month: every electric company has a basic charge per month regardless of the consumption.

² Demand/kW: commercial and industrial customers are charged demand charge that residential customers are not charged.

³ The basic charge for less than 20kW is \$12.00 and the rate is 0.08160.

⁴ \$8.25: The demand charge is \$8:25 for greater than 20 kW and less than 100kW. There is no demand charge for less than 20kW.

⁵ \$0.027(400), \$0.038691: Kingman and Lake Havasu City have the same utilities provider and therefore they have the same charge. For the first 400kWh, a rate of \$0.027 is charged per kWh. For any additional consumption, a rate of \$0.038691 is charged per kWh.

⁶ \$9.33(100): Casa Grande has a different demand charge based on two types of service: secondary service and primary service. For purposes of simplification, \$9.33 was calculated by averaging the two different charges of \$9.675 and \$8.976. \$9.33 is charged per kW for the first 100kW. \$4.797 is the demand charge per kW after the first 100kW. The \$4.797 was also computed using the average of the two rates. The rates for the two different services were \$5.146 and \$4.448.

⁷ \$0.095(200); \$0.052: Casa Grande has a different energy charge based on two cycles: summer and winter. For purposes of simplification, \$ 0.095 was calculated by averaging the two cycle charges of \$0.10403 and \$0.08689. \$0.095 is charged for the first 200kWh and \$0.052 for the remaining consumption. The \$0.052 was also calculated by averaging the rates of the two cycles. The rates for the two cycles were \$0.06083 and \$0.04369 per kWh.

⁸ \$7.82(+5): St. George does not charge a demand charge for the first 5 kW. After the first 5kW, a demand charge of \$7.82 is charged per kW

⁹ \$0.12(500), \$0.07(9500), \$0.04: Sr. George charges \$0.12 for the first 500 kWh, \$0.07 for 500kWh-9500kWh, and \$0.04 for any additional consumption.

*Because every company uses a different price and classification system, the comparison is made using the best data available.

* The rates are based on bundled service

* Kingman and Lake Havasu have identical data because UniSource Energy Services provides the utility service for both

*Consumption charge and energy charge are used interchangeably

Electricity is an essential factor for business locations that consume large amounts of energy. The cost was compared using the basic charge per month, demand charge per kW, and energy charge per kWh. Analysis based on the figures in the table above suggests the electric cost for small general service is

highest in Bullhead City; AZ for more than 20kW. UniSource Energy Services provides electricity for both Kingman and Lake Havasu City while the prices remain average compared to the other cities.

Table 2 – Large Commercial/Industrial Electric User			
	basic/month¹	Demand/kW²	Energy Charge/kWh
Bullhead City, AZ	\$70	\$9.75 ³	\$0.04558
Kingman, AZ	\$16	\$12.14	\$0.068197
Lake Havasu City, AZ	\$16	\$12.14	\$0.068197
Casa Grande, AZ	\$21.69	\$8.29(100); 3.90 ⁴	\$.093(200); \$.051 ⁵
Henderson, NV	\$215.30	\$16.83	\$0.06700
St. George, UT	\$45.46	\$11.55(+5) ⁴	\$.054(10000);\$.040 ⁶

Bullhead City Source: Mohave Electric Cooperative, 5-25-11

Kingman and Lake Havasu City Source: UniSourceEnergy Services, 10-01-10

Casa Grande Source: APS Rate Schedule, 01-01-10

Henderson Source: NV Energy, 4-02-11

St. George Source: <http://www.sgcity.org/utilities/rates.php>, 05-25-11

¹ Basic/month: every electric company has a basic charge per month regardless of the consumption.

² Demand/kW: commercial and industrial customers are charged demand charge that residential customers are not charged.

³ \$9.75: A demand charge of \$9.75 is charged for greater than 100kW

⁴ \$8.29(100): Casa Grande has a different demand charge based on three types of service: secondary service, primary service, and transmission service. For purposes of simplification, \$8.29 was calculated by averaging the three different charges of \$9.384, \$8.703, and \$6.788. \$8.29 is charged per kW for the first 100kW. \$3.90 is the demand charge per kW for any additional demand. The \$3.90 was also computed using the average of the three rates. The rates for the three different services were \$4.993, \$4.315, and \$2.396.

⁵ \$0.093(200); \$0.051: Casa Grande has a different energy charge based on two cycles: summer and winter. For purposes of simplification, \$ 0.093 was calculated by averaging the two cycle charges of \$0.10093 and \$0.08430. \$0.093 is charged for the first 200kWh and \$0.051 for the remaining consumption. The \$0.051 was also calculated by averaging the rates of the two cycles. The rates for the two cycles were \$0.05902and \$0.04239 per kWh.

⁶ \$11.55(+5): St. George does not charge a demand charge for the first 5 kW. After the first 5kW, a demand charge of \$11.55 is charged per kW

⁷ \$.054(10000); \$.04: Sr. George charges \$0.054 for the first 10000 kWh and \$0.04 for any additional consumption.

*Because every company uses a different price and classification system, the comparison is made using the best data available.

* The rates are based on bundled service

* Kingman and Lake Havasu have identical data because UniSource Energy Services provides the utility service for both.

*Consumption charge and energy charge are used interchangeably

Large General Electric Service was also compared and based on the figures in Table 2 above. Henderson, NV has the highest cost overall, while Bullhead City is the second highest. Kingman and Lake Havasu City have the lowest utility costs overall. In comparing the small service with the large service, Bullhead City and Henderson City have the highest electric costs and Kingman and Lake Havasu City have the lowest electric costs on average.

PROPERTY TAX RATES

The property tax rate was computed using the total countywide primary tax rate, the secondary tax rate, and the city tax rate. The city tax rate excludes any school district and fire district taxes. Bullhead City and Kingman do not have a city tax rate so the rate for those cities was computed to be \$3.617 per \$100 of assessed valuation. The tax rate for Lake Havasu City is \$0.5834 so the total tax rate was \$4.2004 per \$100 of assessed valuation. Casa Grande has the highest property tax rate at \$7.8049, of which \$6.3631 is the total of the primary tax rate and secondary tax rate and \$1.4418 is the city tax rate. The city of Henderson had a tax rate of \$0.5608 and it was computed to be \$1.5926 per \$100 of assessed valuation.

Table 19 – Property Tax Rates per \$100 of Assessed Valuation

Bullhead City, AZ	\$3.6170
Kingman, AZ	\$3.6170
Lake Havasu City, AZ	\$4.2004
Casa Grande, AZ	\$7.8049
Henderson, NV	\$1.5926
St. George, UT	\$0.4722

Bullhead City, Kingman, Lake Havasu City, and Casa Grande Source: 2010 Property Tax Rates & Assessed Values

Henderson Source: Clark County Tax Rates

St. George Source: Washington County Assessor Office, Kim Hafen, 06-06-11

Comparison of these tax rates suggests that the total tax rate per \$100 of assessed valuation is much higher in the communities of Mohave County than it is in Henderson and St. George, however, much lower than Casa Grande, AZ. St. George has the same tax rate for residential and commercial property however, residential property is considered primary and is discounted at 55%. The tax rate for the city of St. George is currently \$0.012526 and includes the school district tax. After subtracting the local school fund tax of \$0.006309 and state school fund tax of \$0.001495, the tax rate was calculated to be \$0.4722 per \$100 of assessed valuation.



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