

Community Assessment San Juan County



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Introduction

What is the Community Assessment?

The Community Assessment is a strategic planning document that provides a detailed examination of a community's competitive advantages and constraints as a place to do business. It is intended to provide insights and be an asset in creating a corporate recruitment, retention, and expansion strategy as part of the EDCUtah Development Ready Communities program.

The Community Assessment utilizes a variety of public and private data sources, some of which might not be readily available to most community organizations, along with professionally built analyses that may be used to fully inform decision makers.

Why does the Community Assessment matter?

For a community to recruit high-value companies, communities must first understand the site selection process. Communities must be able to assess economic strengths and weaknesses to present to site selectors. The site selection process may be long, arduous, and costly for a company. It analyzes many factors, including costs, workforce, tax incentives, quality of life, real estate, the state economy, and the local economy, among others. This assessment will provide you with tools for this process.

Why is the Community Assessment so valuable?

This assessment focuses on five main areas that influence a community's development readiness: economy, demography, industry, workforce, and assets. Examination of the data within these key areas will give a community a better understanding of the most important issues impacting competitive ability to attract businesses and site selectors.

In order to provide communities with the best value and most extensive data, EDCUtah takes advantage of 30 years of economic development experience to create an extensive process and to provide an interpretation for the Community Assessment. It is made up of the most up-to-date economic information and statistics on a statewide, regional, and local level. In order to create this assessment, we:

- Evaluated your community in a thoroughly designed and orchestrated 55+ step process of compiling, organizing, and analyzing economic, demographic, and geographic assets and trends.
- Pulled an extensive amount of data points from both public and private sources alike. Sources such as the U.S Census, Bureau of Labor Statistics (BLS), Council for Community and Economic Research (C2ER), Bureau of Economic Analysis (BEA), JobsEQ, ESRI, and Utah Department of Workforce Services (DWS).
- Reviewed the assessment with economic developers, business consultants, community strategists, and research experts.

The Community Assessment provides you with strategic recommendation to further develop your community using quantitative and qualitative data.

EDCUtah has a long and experienced track record of using research and information to attract new businesses and expand existing ones. This expertise is shown in your Community Assessment and we hope to work with you as partners to assist you with developing your community.

Executive Summary

Summary of Competitive Advantages

Utah State University
Lower Industrial Electricity Rates and Sales Tax
Quality of Life – Air Quality, Cost of Living, and Outdoor Assets

Summary of Constraints

Market Size
Geographic Isolation
% of Population with Bachelor's Degree
Unsteady Employment

Observations

Unemployment is trending in the positive direction, although still significantly higher than Utah's average.

Cost of living is lower than Utah's index, which increases purchasing power in the county.

Gross Domestic Product growth in the county has been volatile over the past decade, and real growth is slow.

Median household income in the county is 65% of the state's average.

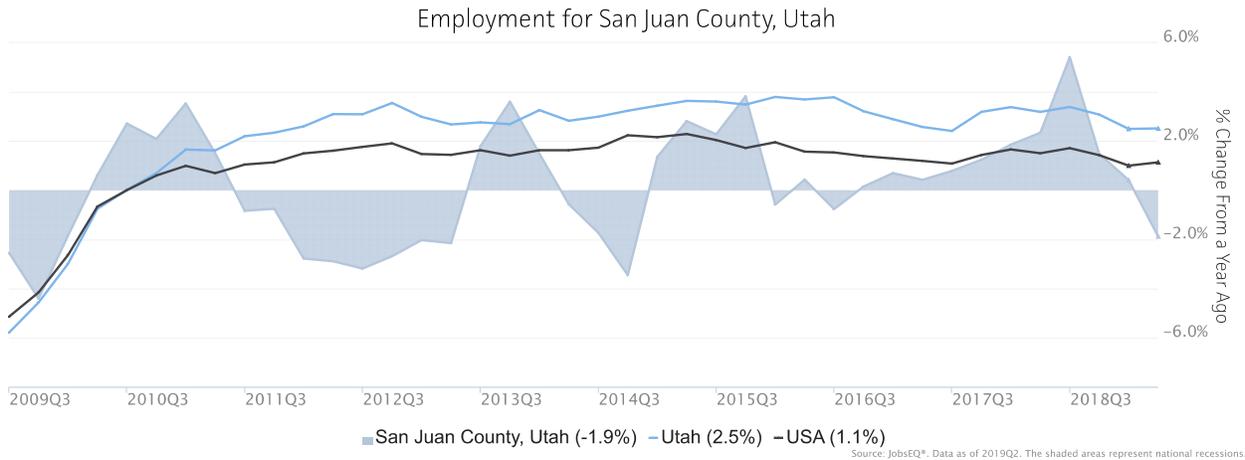
Employment inflow is positive, with more people entering the county for work, than those who leave.

The economy is driven by four industry sectors (health care and social services, education services, accommodation and food services and public administration), although the strongest industry location quotients are found in mining, quarrying and oil and gas extraction; and agriculture, forestry, fishing and hunting. Other industry sectors are mostly in line with national averages.

Economic Overview

Employment Trends

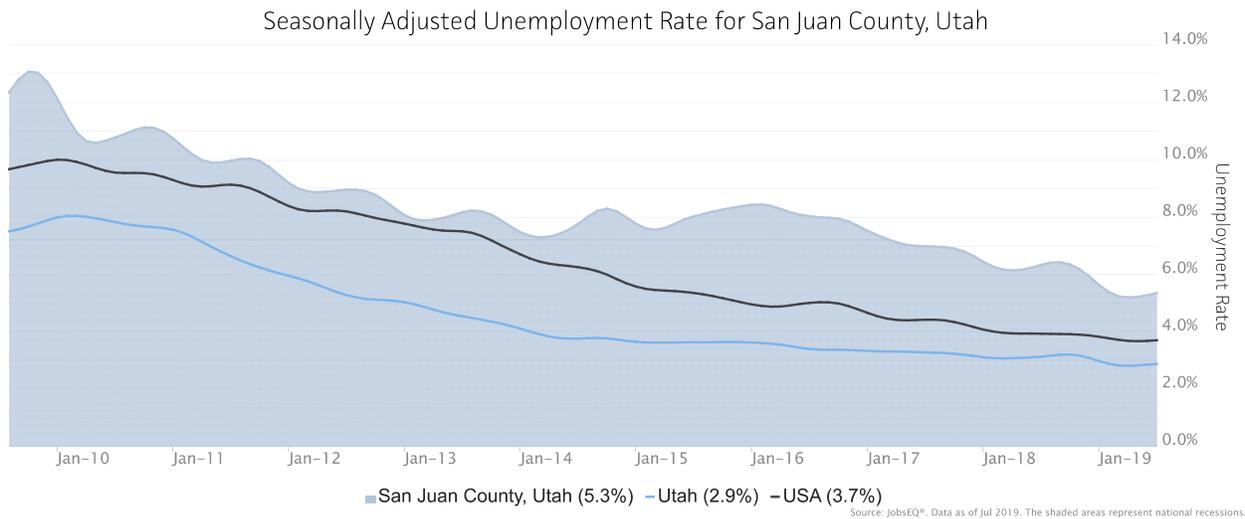
As of 2019Q2, total employment for San Juan County, Utah was 4,871 (based on a four-quarter moving average). Over the year ending 2019Q2, employment declined 1.9% in the region.



Employment data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and imputed where necessary. Data are updated through 2018Q3 with preliminary estimates updated to 2019Q2.

Unemployment Rate

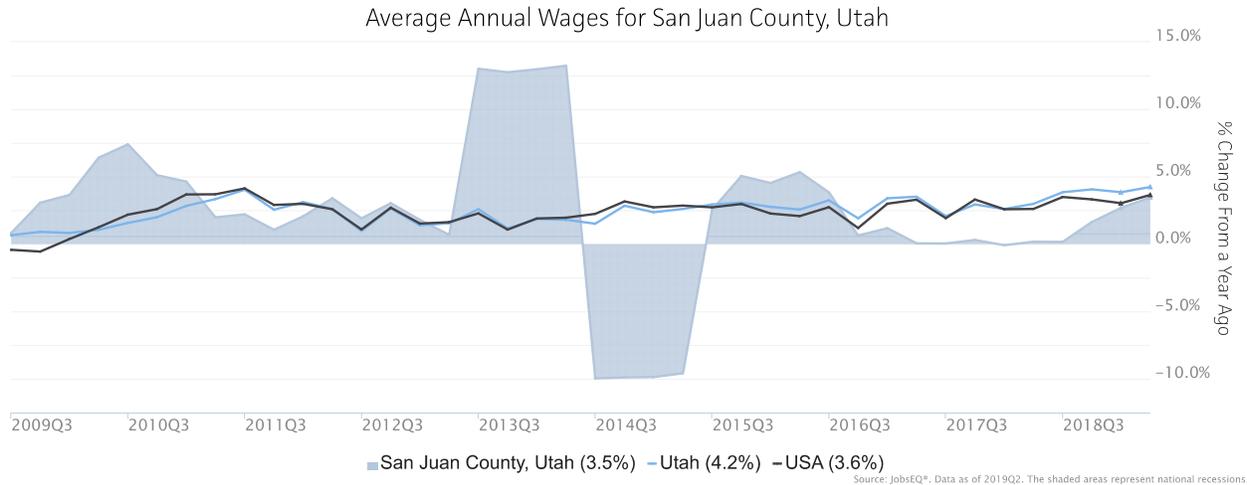
The seasonally adjusted unemployment rate for San Juan County, Utah was 5.3% as of July 2019. The regional unemployment rate was higher than the national rate of 3.7%. One year earlier, in July 2018, the unemployment rate in San Juan County, Utah was 6.3%.



Unemployment rate data are from the Local Area Unemployment Statistics, provided by the Bureau of Labor Statistics and updated through July 2019.

Wage Trends

The average worker in San Juan County, Utah earned annual wages of \$34,209 as of 2019Q2. Average annual wages per worker increased 3.5% in the region over the preceding four quarters. For comparison purposes, annual average wages were \$57,025 in the nation as of 2019Q2.



Annual average wages per worker data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and imputed where necessary. Data are updated through 2018Q3 with preliminary estimates updated to 2019Q2.

Cost of Living Index

The Cost of Living Index estimates the relative price levels for consumer goods and services. When applied to wages and salaries, the result is a measure of relative purchasing power. The cost of living is 7.8% lower in San Juan County, Utah than the U.S. average.

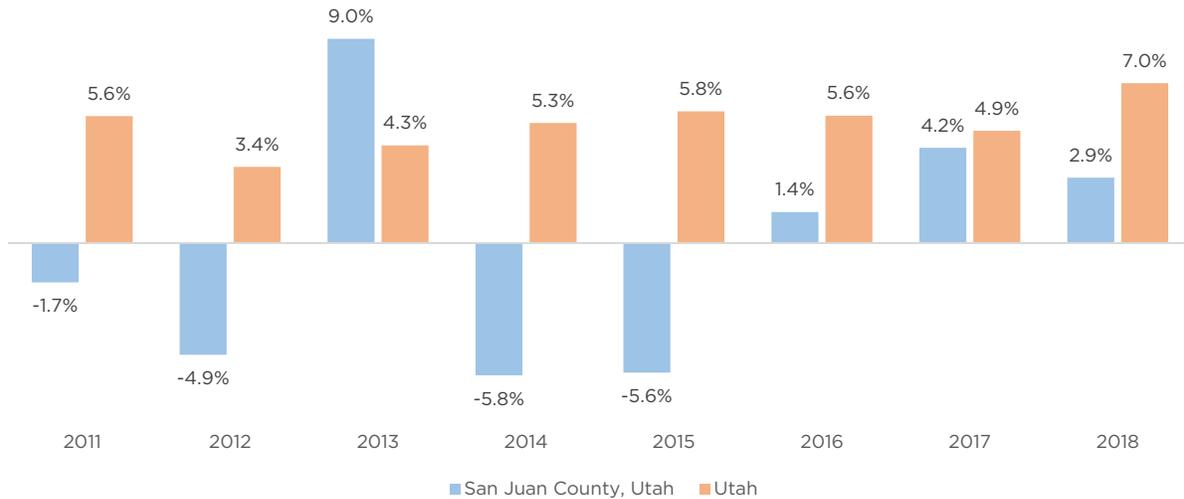
	ANNUAL AVERAGE SALARY	COST OF LIVING INDEX (BASE US)	US PURCHASING POWER
San Juan County, Utah	\$34,209	92.2	\$37,123
Utah	\$48,922	101.4	\$48,223
USA	\$57,025	100.0	\$27,025

Source: JobsEQ*
Data as of 2019Q2
Cost of Living per C2ER, data as of 2019q1, imputed by Chmura where necessary.

Gross Domestic Product

Gross Domestic Product (GDP) is the total value of goods and services produced by a region. In 2018, nominal GDP in San Juan County, Utah expanded 2.9%. This follows growth of 4.2% in 2017. As of 2018, total GDP in San Juan County, Utah was \$382,515,000.

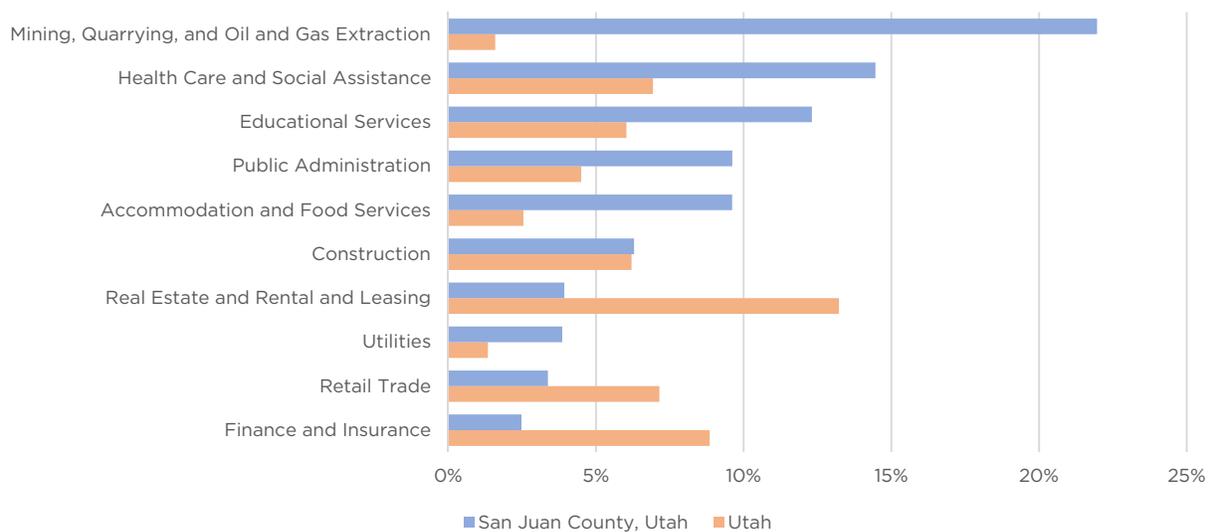
Annual Percent Change in GDP



Gross Domestic Product data are provided by the Bureau of Economic Analysis, imputed by Chmura where necessary, updated through 2017.

Of the sectors in San Juan County, Utah, Mining, Quarrying, and Oil and Gas Extraction contributed the largest portion of GDP in 2018, \$84,021,000. The next-largest contributions came from Health Care and Social Assistance (\$55,309,000); Educational Services (\$47,101,000); and Public Administration (\$36,793,000).

Percentage of Total GDP by Industry



Gross Domestic Product data are provided by the Bureau of Economic Analysis, imputed by Chmura where necessary, updated through 2017.

Demographic Overview

Demographic Breakdown

The population in San Juan County, Utah was 15,193 per American Community Survey data for 2013-2017. The region has a civilian labor force of 5,727 with a participation rate of 52.4%. The median household income in San Juan County, Utah is \$42,581 and the median house value is \$136,600.

	PERCENT			VALUE		
	SAN JUAN COUNTY, UTAH	UTAH	USA	SAN JUAN COUNTY, UTAH	UTAH	USA
Demographics						
Population (ACS)	—	—	—	15,193	2,993,941	321,004,407
Male	50.4%	50.3%	49.2%	7,654	1,506,614	158,018,753
Female	49.6%	49.7%	50.8%	7,539	1,487,327	162,985,654
Median Age ²	—	—	—	31.6	30.5	37.8
Under 18 Years	31.7%	30.4%	22.9%	4,819	911,411	73,601,279
18 to 24 Years	10.3%	11.3%	9.7%	1,561	339,440	31,131,484
25 to 34 Years	11.8%	14.9%	13.7%	1,790	444,931	44,044,173
35 to 44 Years	10.9%	13.3%	12.7%	1,657	398,090	40,656,419
45 to 54 Years	11.1%	10.3%	13.4%	1,693	309,683	43,091,143
55 to 64 Years	11.4%	9.5%	12.7%	1,735	283,291	40,747,520
65 to 74 Years	7.3%	6.1%	8.6%	1,110	181,190	27,503,389
75 Years, and Over	5.4%	4.2%	6.3%	828	125,905	20,229,000
Race: White	48.2%	86.8%	73.0%	7,319	2,600,077	234,370,202
Race: Black or African American	0.2%	1.1%	12.7%	36	33,619	40,610,815
Race: American Indian and Alaska Native	48.3%	1.1%	0.8%	7,343	32,079	2,632,102
Race: Asian	0.5%	2.3%	5.4%	76	67,545	17,186,320
Race: Native Hawaiian and Other Pacific Islander	0.5%	0.9%	0.2%	82	26,742	570,116
Race: Some Other Race	0.5%	5.0%	4.8%	76	150,596	15,553,808
Race: Two or More Races	1.7%	2.8%	3.1%	261	83,283	10,081,044
Hispanic or Latino (of any race)	5.3%	13.7%	17.6%	809	409,311	56,510,571
Population Growth						
Population (Pop Estimates) ²	—	—	—	15,449	3,161,105	327,167,434
Population Annual Average Growth ²	0.7%	1.7%	0.7%	101	49,808	2,307,347

	PERCENT			VALUE		
	SAN JUAN COUNTY, UTAH	UTAH	USA	SAN JUAN COUNTY, UTAH	UTAH	USA
Economic						
Labor Force Participation Rate and Size (civilian population 16 years and over)	52.4%	67.9%	63.3%	5,727	1,476,528	161,159,470
Median Household Income ¹	—	—	—	\$42,581	\$65,325	\$57,652
Per Capita Income	—	—	—	\$17,385	\$26,907	\$31,177
Poverty Level (of all people)	28.4%	11.0%	14.6%	4,189	324,856	45,650,345
Mean Commute Time (minutes)	—	—	—	20.6	21.6	26.4
Commute via Public Transportation	0.5%	2.5%	5.1%	26	34,885	7,607,907

Source: JobsEQ[®]

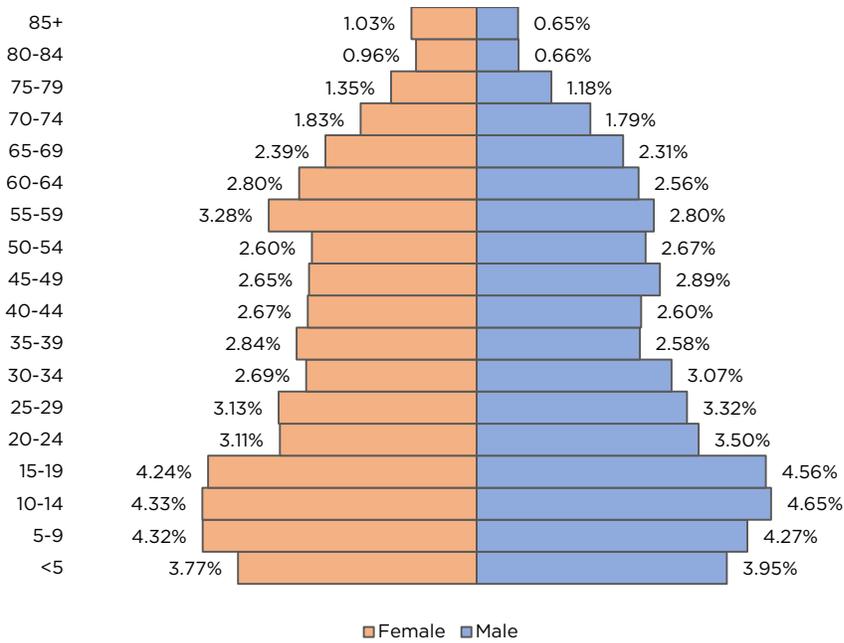
American Community Survey 2013-2017, unless noted otherwise

1. Median values for certain aggregate regions (such as MSAs) may be estimated as the weighted averages of the median values from the composing counties.

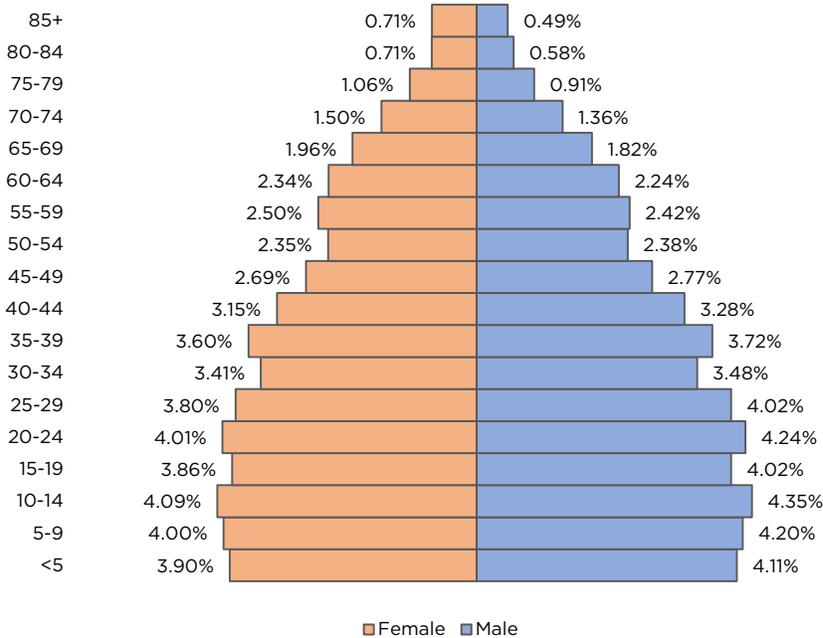
2. Census 2018, annual average growth rate since 2008

Population Pyramid

San Juan County



Utah



Inflow / Outflow

The US Census Bureau's Inflow / Outflow analytic helps highlight the daily migration of employment into, within, and out of a region. The below visual shows the proportion of daily workers in the region. Ideally, a community retains a large portion of their labor force to work within the community without having a significant percentage leaving the community on a daily basis. When large numbers of the labor force leave the community each day for work, it puts additional strain on infrastructure, such as roads and highways, and potential sales taxes from the population spending outside of the community are lost. Additionally, large daily labor force loss may indicate a lack of employment opportunities within the community compared to surrounding communities.



Jobs Counts by Counties Where Workers Live

	2017	
	Count	Share
All Counties	3,836	100.00%
San Juan County, UT	2,357	61.40%
Grand County, UT	166	4.30%
San Juan County, NM	126	3.30%
Navajo County, AZ	121	3.20%
Apache County, AZ	117	3.10%
Montezuma County, CO	76	2.00%
Salt Lake County, UT	76	2.00%
Utah County, UT	73	1.90%
Coconino County, AZ	49	1.30%
Carbon County, UT	42	1.10%
All Other Locations	633	16.50%

Image Source: US Census Bureau

Jobs Counts by Counties Where Workers are Employed

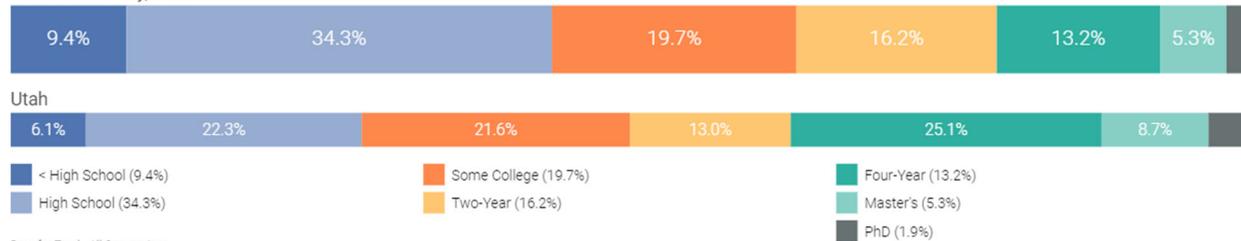
	2017	
	Count	Share
All Counties	3,491	100.00%
San Juan County, UT	2,357	67.50%
Grand County, UT	290	8.30%
Salt Lake County, UT	140	4.00%
Utah County, UT	74	2.10%
Montezuma County, CO	59	1.70%
Mesa County, CO	48	1.40%
Carbon County, UT	40	1.10%
Washington County, UT	31	0.90%
Duchesne County, UT	22	0.60%
Emery County, UT	22	0.60%
All Other Locations	408	11.70%

Image Source: US Census Bureau

Education Levels and Projected Growth

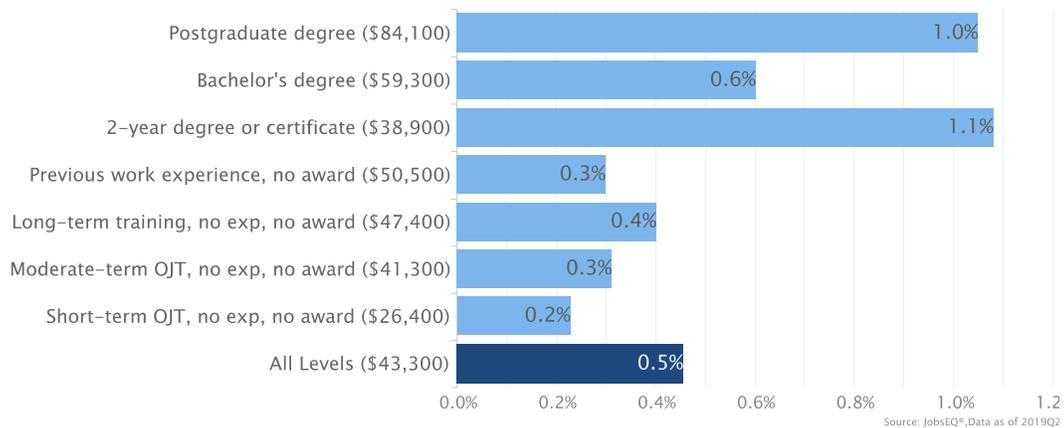
Educational Attainment:

San Juan County, Utah



Data for Total - All Occupations
Source: JobsEQ®, Data as of 2019Q2.

Annual Average Projected Job Growth by Training Required for San Juan County, Utah



Employment by occupation data are estimates as of 2019Q2. Education levels of occupations are based on BLS assignments. Forecast employment growth uses national projections from the Bureau of Labor Statistics adapted for regional growth patterns.

ESRI Tapestry Profile

The profile information below describes a region’s consumer market based upon ESRI’s classification model of 67 distinct market segments within 14 summary groups. ESRI’s tapestry profile is based upon a segmentation system that uses geodemographic consumer traits and residential characteristics to identify and classify regional neighborhoods. Below are the specific market segments that make up a majority of the region’s population. The region’s market segments provide a better understanding of the consumer and economic needs of the region.

Top Segments within the Community

	Diners and Miners 1,078 households	23.4% of Households
	Heartland Communities 717 households	15.6% of Households
	Middleburg 677 households	14.7% of Households

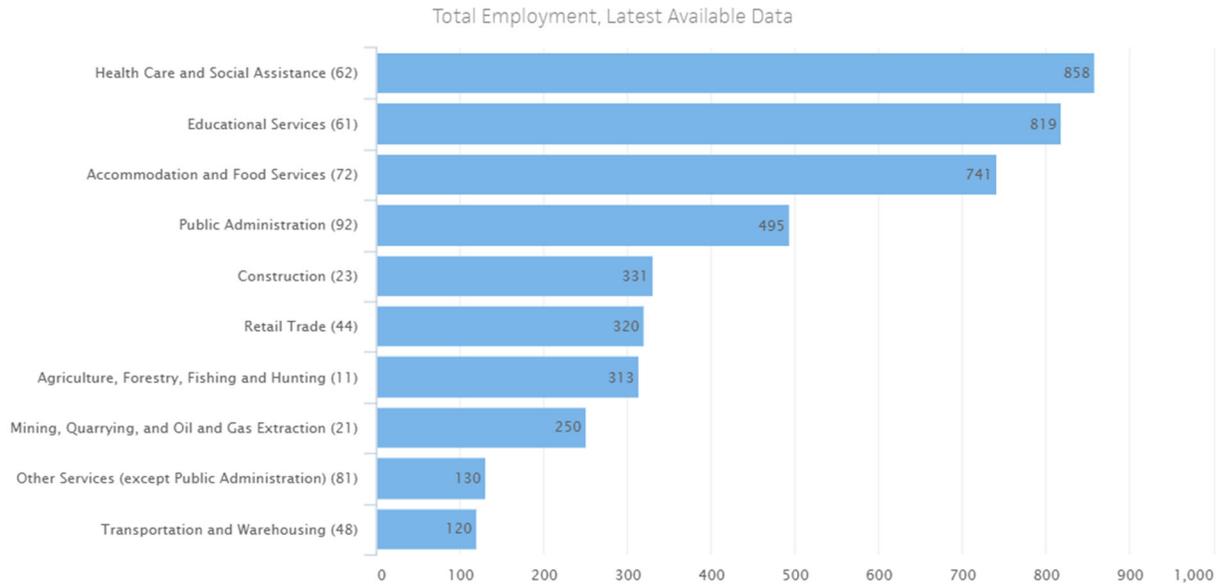
Segment Statistic

	DINERS AND MINERS	HEARTLAND COMMUNITIES	MIDDLEBURG
% OF US HOUSEHOLDS	0.6%	2.3%	2.8%
AVG. HOUSEHOLD SIZE	2.54	2.39	2.75
MEDIAN AGE	41.3	42.3	36.1
MEDIAN HHI	\$42,100	\$42,400	\$59,800

Industry Overview

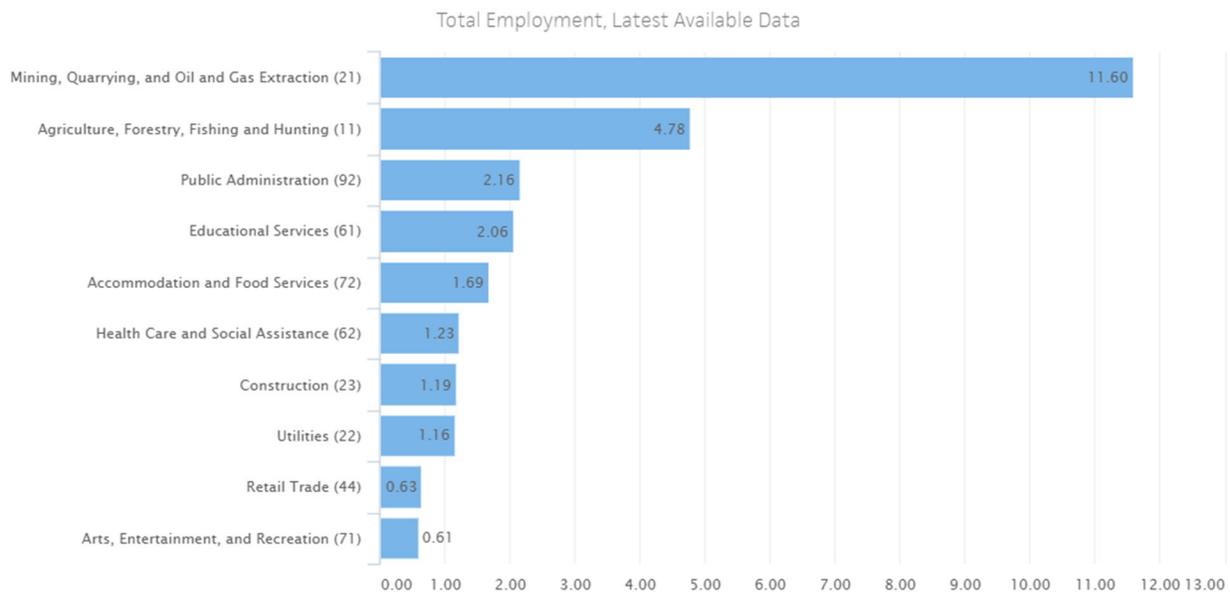
Employment by Industry

The largest sector in San Juan County, Utah is Health Care and Social Assistance, employing 858 workers. The next-largest sectors in the region are Educational Services (819 workers) and Accommodation and Food Services (741). High location quotients (LQs) indicate sectors in which a region has high concentrations of employment compared to the national average. The sectors with the largest LQs in the region are Mining, Quarrying, and Oil and Gas Extraction (LQ = 11.60), Agriculture, Forestry, Fishing and Hunting (4.78), and Public Administration (2.16).



Source: JobsEQ Note: Figures may not sum due to rounding. Growth Demand is based on 4-qtr moving avg. employment from the latest available date.

Industry Location Quotients



Source: JobsEQ Note: Figures may not sum due to rounding. Growth is based on 4-qtr moving avg. employment from the latest available date.

Industry Strengths

The below Location Quotient Analysis shows industries of strength within the community. Location Quotients are a measure of employment density compared to the nation. With the national baseline at 1.0, any location quotient higher than 1.0 indicates a higher than average industry density. The Location Quotient Analysis also uses total employment and the average annual percent change in employment over the last five years as metrics in the analysis. Primary industries are highlighted in green while secondary industries are highlighted in orange.

Location Quotient Analysis: San Juan County, Utah

NAICS	Industry	FOUR QUARTERS ENDING WITH 2019q1		AVERAGE ANNUAL % CHANGE IN EMPLOYMENT
		Empl	LQ	Region
7211	Traveler Accommodation	447	6.98	5.3%
1120	Animal Production (Proprietors)	207	14.52	-4.0%
2122	Metal Ore Mining	118	90.41	-10.9%
7223	Special Food Services	102	3.94	46.4%
2111	Oil and Gas Extraction	79	16.70	5.3%
1110	Crop Production (Proprietors)	75	8.72	14.6%
3116	Animal Slaughtering and Processing	52	3.23	3.9%
2131	Support Activities for Mining	47	4.29	-12.0%
7121	Museums, Historical Sites, and Similar Institutions	44	5.79	-1.2%
4842	Specialized Freight Trucking	27	1.80	15.0%
5191	Other Information Services	26	1.71	-2.1%
7212	RV (Recreational Vehicle) Parks and Recreational Camps	16	7.21	55.3%
3331	Agriculture, Construction, and Mining Machinery Manufacturing	13	1.82	-12.8%
5223	Activities Related to Credit Intermediation	12	1.27	23.0%
3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing	11	1.42	-5.1%
1111	Oilseed and Grain Farming	9	5.20	3.3%
3219	Other Wood Product Manufacturing	9	1.17	-8.2%

Source: JobsEQ

Supply Chain Analysis

The Supply Chain Analysis estimates the dollars spent on goods and services in the nation by industry within a region for a specific industry. The Supply Chain Analysis has been created for the top three 2-Digit NAICS industries in the community by employment share. The “Purchases from In-Region Firms” column shows the supply dollars captured within the region. “Potential Supply Leakage” shows the supply dollars spent outside of the community that could potentially be captured within the community if additional suppliers were to be added.

Supply Chain: Health Care and Social Assistance in San Juan County, Utah

NAICS	SUPPLIER INDUSTRIES	PURCHASES FROM US FIRMS	PURCHASES FROM IN-REGION FIRMS	POTENTIAL SUPPLY LEAKAGE	% IN-REGION PURCHASES
5313	Activities Related to Real Estate	\$4,605,000	\$351,000	\$4,254,000	8%
5241	Insurance Carriers	\$2,647,000	\$219,000	\$2,428,000	8%
5312	Offices of Real Estate Agents and Brokers	\$2,343,000	\$208,000	\$2,135,000	9%
3391	Medical Equipment and Supplies Manufacturing	\$1,831,000	\$0	\$1,831,000	0%
5416	Management, Scientific, and Technical Consulting Services	\$1,617,000	\$140,000	\$1,477,000	9%
5311	Lessors of Real Estate	\$1,519,000	\$26,000	\$1,493,000	2%
5613	Employment Services	\$1,159,000	\$0	\$1,159,000	0%
5511	Management of Companies and Enterprises	\$1,154,000	\$32,000	\$1,122,000	3%
3254	Pharmaceutical and Medicine Manufacturing	\$1,127,000	\$0	\$1,127,000	0%
6215	Medical and Diagnostic Laboratories	\$1,026,000	\$0	\$1,026,000	0%
7225	Restaurants and Other Eating Places	\$1,005,000	\$265,000	\$740,000	26%
5173	Wired and Wireless Telecommunications Carriers	\$962,000	\$0	\$962,000	0%
5411	Legal Services	\$949,000	\$64,000	\$885,000	7%
2211	Electric Power Generation, Transmission and Distribution	\$929,000	\$162,000	\$767,000	17%
5221	Depository Credit Intermediation	\$881,000	\$163,000	\$718,000	19%
5239	Other Financial Investment Activities	\$763,000	\$0	\$763,000	0%
5617	Services to Buildings and Dwellings	\$660,000	\$111,000	\$549,000	17%
3241	Petroleum and Coal Products Manufacturing	\$523,000	\$0	\$523,000	0%
5412	Accounting, Tax Preparation, Bookkeeping, and Payroll Services	\$479,000	\$82,000	\$397,000	17%
3261	Plastics Product Manufacturing	\$434,000	\$0	\$434,000	0%
	Total	\$42,322,000	\$3,588,000	\$38,734,000	8%

Source:
JobsEQ
Data as of
2019Q2

Supply Chain: Accommodation and Food Services in San Juan County, Utah

NAICS	SUPPLIER INDUSTRIES	PURCHASES FROM US FIRMS	PURCHASES FROM IN-REGION FIRMS	POTENTIAL SUPPLY LEAKAGE	% IN-REGION PURCHASES
5511	Management of Companies and Enterprises	\$1,950,000	\$48,000	\$1,902,000	2%
5313	Activities Related to Real Estate	\$1,486,000	\$95,000	\$1,391,000	6%
5241	Insurance Carriers	\$1,005,000	\$34,000	\$971,000	3%
2211	Electric Power Generation, Transmission and Distribution	\$864,000	\$239,000	\$625,000	28%
7225	Restaurants and Other Eating Places	\$813,000	\$71,000	\$742,000	9%
5312	Offices of Real Estate Agents and Brokers	\$756,000	\$56,000	\$700,000	7%
5617	Services to Buildings and Dwellings	\$737,000	\$100,000	\$637,000	14%
5416	Management, Scientific, and Technical Consulting Services	\$717,000	\$26,000	\$691,000	4%
5173	Wired and Wireless Telecommunications Carriers	\$667,000	\$0	\$667,000	0%
3116	Animal Slaughtering and Processing	\$652,000	\$167,000	\$485,000	26%
5418	Advertising, Public Relations, and Related Services	\$596,000	\$0	\$596,000	0%
3241	Petroleum and Coal Products Manufacturing	\$558,000	\$0	\$558,000	0%
5311	Lessors of Real Estate	\$490,000	\$7,000	\$483,000	1%
5231	Securities and Commodity Contracts Intermediation and Brokerage	\$457,000	\$0	\$457,000	0%
5411	Legal Services	\$450,000	\$14,000	\$436,000	3%
5331	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	\$446,000	\$0	\$446,000	0%
3115	Dairy Product Manufacturing	\$439,000	\$0	\$439,000	0%
5221	Depository Credit Intermediation	\$437,000	\$39,000	\$398,000	9%
3222	Converted Paper Product Manufacturing	\$421,000	\$0	\$421,000	0%
5222	Nondepository Credit Intermediation	\$417,000	\$34,000	\$383,000	8%
Total		\$29,260,000	\$2,405,000	\$26,855,000	8%

Source: JobsEQ
Data as of 2019Q2

Supply Chain: Construction in San Juan County, Utah

NAICS	SUPPLIER INDUSTRIES	PURCHASES FROM US FIRMS	PURCHASES FROM IN-REGION FIRMS	POTENTIAL SUPPLY LEAKAGE	% IN-REGION PURCHASES
3241	Petroleum and Coal Products Manufacturing	\$1,723,000	\$0	\$1,723,000	0%
5413	Architectural, Engineering, and Related Services	\$1,118,000	\$80,000	\$1,038,000	7%
3323	Architectural and Structural Metals Manufacturing	\$885,000	\$56,000	\$829,000	6%
3273	Cement and Concrete Product Manufacturing	\$769,000	\$0	\$769,000	0%
3261	Plastics Product Manufacturing	\$584,000	\$0	\$584,000	0%
5324	Commercial and Industrial Machinery and Equipment Rental and Leasing	\$548,000	\$222,000	\$326,000	41%
4841	General Freight Trucking	\$519,000	\$95,000	\$424,000	18%
5313	Activities Related to Real Estate	\$492,000	\$33,000	\$459,000	7%
4441	Building Material and Supplies Dealers	\$432,000	\$99,000	\$333,000	23%
5511	Management of Companies and Enterprises	\$431,000	\$11,000	\$420,000	3%
5173	Wired and Wireless Telecommunications Carriers	\$429,000	\$0	\$429,000	0%
4481	Clothing Stores	\$414,000	\$22,000	\$392,000	5%
4461	Health and Personal Care Stores	\$406,000	\$174,000	\$232,000	43%
2123	Nonmetallic Mineral Mining and Quarrying	\$370,000	\$158,000	\$212,000	43%
4471	Gasoline Stations	\$351,000	\$285,000	\$66,000	81%
5221	Depository Credit Intermediation	\$347,000	\$64,000	\$283,000	18%
3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing	\$335,000	\$0	\$335,000	0%
5411	Legal Services	\$327,000	\$20,000	\$307,000	6%
4251	Wholesale Electronic Markets and Agents and Brokers	\$326,000	\$18,000	\$308,000	6%
2111	Oil and Gas Extraction	\$314,000	\$5,000	\$309,000	2%
	Total	\$25,141,000	\$2,473,000	\$22,668,000	10%

Source: JobsEQ
Data as of 2019Q2

Major Employers

The below list of major employers by employment are important organizations in the community landscape. It is important to maintain a positive relationship with these employers for community collaboration and also for employment retention. Major employers can be a key partner in corporate recruitment efforts, site visits, community promotion, etc.

Employers

Company	City	Employment
San Juan School District	Blanding	500-999
Utah Navajo Health System	Multiple Locations	250-499
State of Utah	Multiple Locations	100-249
United States Government	Multiple Locations	100-249
Utah State University	Blanding	100-249
San Juan County	Monticello	100-249
Monument Valley Lodge	Monument Valley	100-249
San Juan Healthcare Services	Monticello	100-249
Blue Mountain Hospital	Blanding	50-99
Gouldings Lodge	Monument Valley	50-99

Hiring Activity

Real Time Intelligence tools were used to create the below lists of hiring activity by occupation and employer. RTI provides live job posting data from over 15,000 sources. These online job postings reflect all ads reported over the last 180 days.

The below occupations are the most common occupations included in job postings for the region. While occupations in retail, sales, and low-skill manufacturing and distribution occupations are always common regardless of the region, ideally a community would also have higher paying hiring activity, such as software developers, operation managers, etc.

Occupations in San Juan County, Utah

SOC	Title	Total Ads
19-3031.01	School Psychologists	89
41-2031.00	Retail Salespersons	88
53-3032.00	Heavy and Tractor-Trailer Truck Drivers	85
43-4051.00	Customer Service Representatives	65
35-3021.00	Combined Food Preparation and Serving Workers, Including Fast Food	48
49-9071.00	Maintenance and Repair Workers, General	46
37-2012.00	Maids and Housekeeping Cleaners	42
41-1011.00	First-Line Supervisors of Retail Sales Workers	40
21-1093.00	Social and Human Service Assistants	39
43-6014.00	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	38

The below list of employers are responsible for the most job postings in the community over the last 180 days. Employers with high hiring activity may be expanding operations, experiencing high turnover (due to industry norms, employer activity, or community landscape, etc.), or experiencing difficulty finding talent. Maintaining a relationship with high activity employers is essential to economic development efforts and employer retention.

Employers in San Juan County, Utah

Employer Name	Total Ads
Aramark Food and Support Services Group Inc.	143
Humana	123
Utah State University	73
UnitedHealth Group	72
Grand County School District	33
Ticaboo Management Ticaboo Management LLC	33
Family Dollar	29
Russell Cellular	18
C.R. England	17
US Department of Agriculture	14

Another insight from Real Time Intelligence is information about the required education level in recent job postings. The below table shows a breakdown of educational requirements from postings within the community over the last 180 days. Jobs requiring higher education typically indicate jobs offering higher wages. Requirement of a High School Diploma is generally most common in job postings, followed by Bachelor's Degree requirement.

Education Levels in San Juan County, Utah

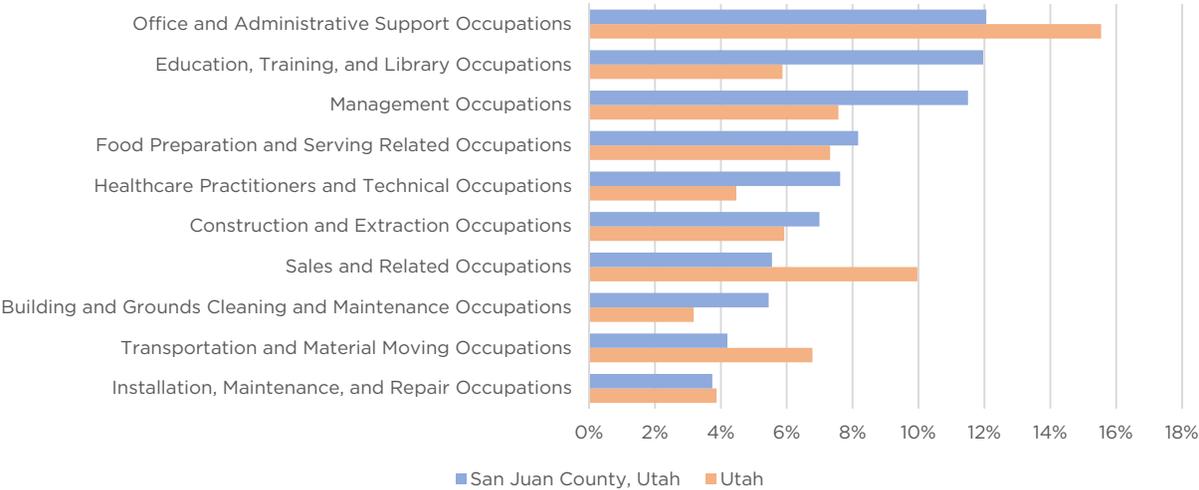
Minimum Education Level	Total Ads
High school diploma or equivalent	315
Bachelor's degree	216
Master's degree	72
Associate's degree	56
Doctoral or professional degree	7

Occupation Overview

Employment by Occupation Grouping

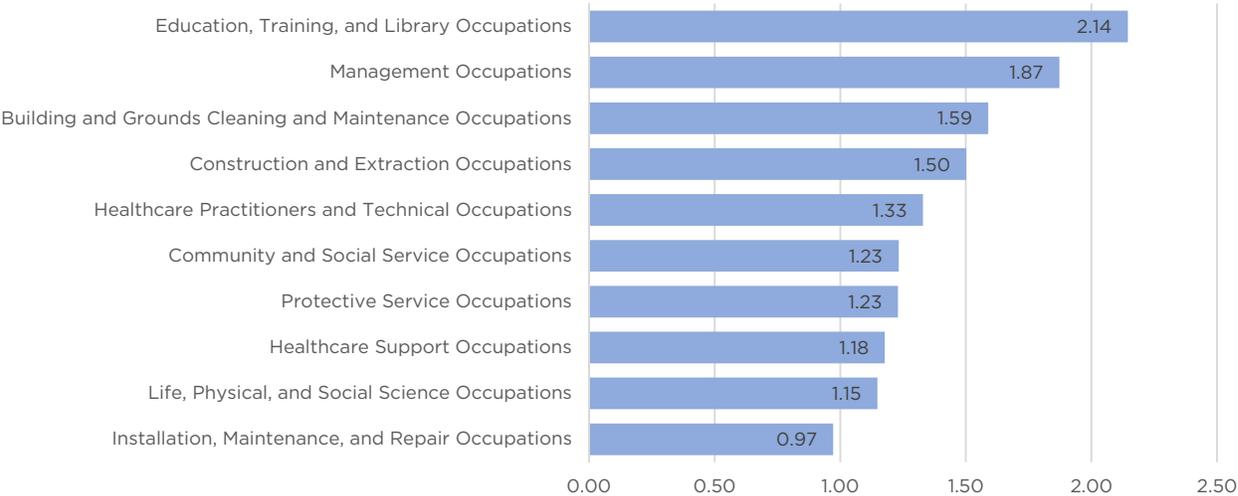
The largest major occupation group in San Juan County, Utah is Office and Administrative Support Occupations, employing 587 workers. The next-largest occupation groups in the region are Education, Training, and Library Occupations (583 workers) and Management Occupations (560). High location quotients (LQs) indicate occupation groups in which a region has high concentrations of employment compared to the national average. The major groups with the largest LQs in the region are Education, Training, and Library Occupations (LQ = 2.14), Management Occupations (1.87), and Building and Grounds Cleaning and Maintenance Occupations (1.59).

Employment by Occupation Percentages



Occupation Location Quotients

Location Quotients by Occupation



Occupation Strengths

The below Location Quotient Analysis shows occupations of strength within the community, similar to the industry based Location Quotient Analysis. Primary occupations are highlighted in green while secondary occupations are highlighted in orange. Understanding the dominant occupations in the community is important to economic development efforts and information that site selectors and expanding companies are always interested in.

Occupation Location Quotient Analysis: San Juan County, Utah

SOC	Title	FOUR QUARTERS ENDING WITH 2018q4		AVERAGE ANNUAL% CHANGE IN EMPLOYMENT
		Employment	LQ	Region
11-9010	Farmers, Ranchers, and Other Agricultural Managers	263	10.20	-2.0%
37-2010	Building Cleaning Workers	207	1.84	4.3%
25-2020	Elementary and Middle School Teachers	151	2.49	3.2%
29-1140	Registered Nurses	138	1.46	5.1%
25-9040	Teacher Assistants	119	2.95	3.6%
11-1020	General and Operations Managers	89	1.22	2.1%
25-2030	Secondary School Teachers	85	2.52	3.2%
31-1010	Nursing, Psychiatric, and Home Health Aides	83	1.09	-6.4%
43-4080	Hotel, Motel, and Resort Desk Clerks	76	9.30	5.8%
47-2060	Construction Laborers	59	1.42	-1.5%
31-9090	Miscellaneous Healthcare Support Occupations	59	1.27	-0.5%
25-3090	Miscellaneous Teachers and Instructors	57	1.92	2.6%
49-9070	Maintenance and Repair Workers, General	56	1.25	1.4%
53-3020	Bus Drivers	43	1.98	2.9%
39-9010	Childcare Workers	43	1.30	2.1%
47-5040	Mining Machine Operators	38	49.40	-9.6%
21-1090	Miscellaneous Community and Social Service Specialists	37	1.66	1.7%
47-2030	Carpenters	37	1.10	1.1%
29-1120	Therapists	35	1.48	1.7%
29-2050	Health Practitioner Support Technologists and Technicians	35	1.42	6.8%
33-3050	Police Officers	34	1.70	2.3%
47-1010	First-Line Supervisors of Construction Trades and Extraction Workers	33	1.60	-2.8%
21-1010	Counselors	33	1.32	0.6%
25-2050	Special Education Teachers	31	2.19	3.1%
25-1190	Miscellaneous Postsecondary Teachers	29	2.27	-0.7%

Source: JobsEQ

Real Estate Overview

Real estate inventory and availability is an ever changing and dynamic factor in economic development transactions. It is imperative to have options with detailed information available for potential projects.

Local economic development organizations can assist EDCUtah in creating and maintaining an inventory of real estate options in the community. We recommend an inventory of at least five properties:

Industrial / Manufacturing

Name
Use Type / Previous Building Use
Site Acreage
Building Square Feet / Dimensions
Construction Type
Ceiling Height
Floor Type / Load Capacity
Rail Service
Utility Specifications
Environmental / Geotechnical Specifications
Special Features
Location Access

Office

Classification
Square Feet
Lease / Sublease
Use Type / Previous Office Use
Location
Parking / Public Transportation
Amenities

Warehouse / Distribution

Building Square Feet / Dimensions
Ceiling Height
Floor Type / Load Capacity
Column Spacing
Dock Doors
Rail Service
Utility Specifications
Location Access

Asset Analysis

Understanding a community’s qualitative and quantitative assets is important to any strategic economic development plan and to becoming a development ready community. Qualitative assets include any assets within the community that provide a benefit to the community and economy that are difficult to measure, but are clearly assets. These assets may include the higher education institutions, military bases and operations, or the public transit system. Quantitative assets include economic, educational, cost, and other metrics that help compare the community in a quantitative manner to other communities. Both qualitative and quantitative assets are critically important in order to accurately tell the story of a community.

Qualitative Assets

EDCUtah designed this community assessment to capture a large percent of a region’s competitive advantages / assets and report them in a quantifiable format. Although the assessments report many of the regions assets, EDCUtah realizes that there are possible qualitative assets that are not fully reported in the assessment. Local economic development organizations can assist EDCUtah by informing us of your community’s qualitative assets / competitive advantages that are not captured in the community assessment. Qualitative Assets could fall into a broad array of categories such as geographical assets, educational assets, etc.

List Qualitative Assets Below:

Quantitative Asset Analysis

The following tables give a breakdown and scoring of the community’s quantitative assets. This scoring system breaks up assets into various asset groupings, such as “Workforce,” “Operation Costs,” or “Geographic Accessibility.” Each category is scored based on the Utah state average or the ideal circumstance for that metric. Each metric received a score which is totaled for the overall category score. Finally, all category scores are added together to produce the grand total. A community that meets or exceeds the state average and ideal circumstance for every metric and category would receive a perfect score of 100.

Workforce

	Control	Community	Score (Out of 5)
Labor Force Participation Rate	67.90%	52.40%	1
% With Bachelor’s Degree or Higher	31.90%	17.30%	0
Median Age	30.3	31.6	4
Total Score			5/15

Labor Costs

	Control	Community	Score (Out of 7)
Median Wage	\$37,100	\$33,600	7
5-year Wage Growth Rate	35%	1.9%	0
Total Score			7/14

Miscellaneous Costs

	Control	Community	Score (Out of 4)
Commercial Electricity Rate	\$0.0806	\$0.0982	0
Industrial Electricity Rate	\$0.0562	\$0.0562	4
State and Average Local Sales Tax Rate	6.94%	6.20%	4
Total Score			8/12

Proximity to Major Markets

	Control	Community	Score (Out of 4)
Miles from MSA with 500k Population	0	271.9	0
County Population	106,960	15,193	0
City Population (Largest city for Counties)	11,672	3,641	0
Total Score			0

Public Transit Accessibility

	Control	Community	Score (Out of 3.33)
Light Rail Access?	Yes	No	0
Commuter Rail Access?	Yes	No	0
Bus System Access?	Yes	No	0
Total Score			0

Ground Infrastructure

	Control	Community	Score (Out of 2)
Freight Rail Access Available?	Yes	No	0
Federal Highway Access Available?	Yes	Yes	2
State Highway Access Available?	Yes	Yes	2
Average Broadband Speed (mbps)	42.2	12.44	0
Broadband Coverage (percent of population with at least 25 mbps)	96%	25.5%	0
Total Score			4/10

Proximity to Colleges and Universities

	Control	Community	Score (Out of 3)
University within Community?	Yes	Yes	3
Technical Colleges within Community?	Yes	No	0
2-Year College within Community?	Yes	No	0
Total Score			3/9

Airport Infrastructure

	Control	Community	Score (Out of 3)
Miles from International Airport	0	312.3	0
Commercial Airport within Community?	Yes	Yes	3
Longest Runway? (Ft.)	6,120	6,000	2.5
Total Score			5.5/9

Quality of Life & Outdoor Recreation

	Control	Community	Score (Out of 1.8)
Cost of Living Index	100.8	92.2	1.8
Purchasing Power (Wage vs COLI)	\$47,244	\$37,123	0.6
Miles from nearest major outdoor asset - Edge of the Cedars State Park Museum, Goosenecks State Park, Canyonlands National Park	0	0	1.8
Professional Sports Team within Community?	Yes	No	0
Air Quality Non-Attainment Status? (PM 2.5)	No	No	1.8
Total Score			6/9

	Control	Community
Grand Total	100	38.50

Areas of Strength

- 1) Miscellaneous Costs
- 2) Quality of Life & Outdoor Recreation
- 3) Airport Infrastructure

Areas of Opportunity

- 1) Workforce
- 2) Ground Infrastructure

Methodology

The data for EDCUtah’s Community Assessment were collected from JobsEQ, ESRI, various U.S. Census Bureau data sets, Bureau of Labor Statistics (BLS), C2ER, Bureau of Economic Analysis (BEA), and additional sources that have been cited throughout the document. EDCUtah’s economic development, community strategy, and economic research professionals worked together to determine which factors would be most important when assessing a community’s economic development environment; resulting in the following five sections.

Economic Overview

To provide a broad overview of a community’s economy, EDCUtah reported the community’s employment trends, unemployment rate, and wage trends from the Quarterly Census of Employment and Wages (QCEW) and BLS. The data were compared with Utah and the Nation over a ten-year period to identify areas of divergence from state and national trends. Cost of living and gross domestic product (GDP) data were pulled from C2ER and the BEA. GDP was disaggregated by Chmura and compared with Utah, both by annual percent change and by percent of total GDP by industry, to identify communities’ largest producing industries.

Demographic Overview

Demographic data were collected from the US Census bureau, JobsEQ, and ESRI to report communities’ racial/ethnic diversity, labor force breakdown, commute times, educational levels, social characteristics, etc. Inflow/Outflow Analyses were compiled by the Census Bureau from state records and are supplemented with other Census Bureau source data. The state assigns employer locations, while workers’ residence locations are assigned by the U.S. Census Bureau using data from multiple federal agencies including the Office of Personnel Management, QCEW and BLS. The ESRI Population Profile uses the American Community Survey (ACS); ESRI’s demographic updates; Experian’s ConsumerView database; and consumer surveys, such as the Survey of the American Consumer from GfK MRI, to capture accurate snapshots of the US marketplace and is tested by linking Tapestry Segmentation to the latest consumer survey data.

Industry Overview

The location quotient analysis table was pulled using JobsEQ. The assessment removed industries that are functions of the population, such as construction, healthcare, and education, and used the table to determine primary and secondary industries in the community. Data for major employers, occupations, and hiring activity within the community come from the Utah Department of Workforce Services (DWS) and JobsEQ’s Real Time Indicators (a proprietary data set developed and maintained by Chmura).

Occupation Overview

Location quotients and employment by occupation data are estimates derived from the Chmura Industry/Occupation Matrix and industry employment data from the QCEW provided by BLS. These were used to provide an assessment of the primary and secondary occupations within the community.

Asset Analysis

Data for this section came from the US Census Bureau, BLS, C2ER, JobsEQ, ESRI, DWS, Electricity Local, Utah Tax Commission, Broadbandnow.com, and various other sources. Indicators were scored on a weighted 100 point scale based on comparisons to state averages and optimum economic targets.

Definitions

What is a Location Quotient?

A location quotient (LQ) is a measurement of concentration in comparison to the nation. An LQ of 1.00 indicates a region has the same concentration of an industry (or occupation) as the nation. An LQ of 2.00 would mean the region has twice the expected employment compared to the nation and an LQ of 0.50 would mean the region has half the expected employment in comparison to the nation.

What is NAICS?

The North American Industry Classification System (NAICS) is used to classify business establishments according to the type of economic activity. The NAICS Code comprises six levels, from the “all industry” level to the 6-digit level. The first two digits define the top level category, known as the “sector,” which is the level examined in this report.

What is SOC?

The Standard Occupational Classification system (SOC) is used to classify workers into occupational categories. All workers are classified into one of over 820 occupations according to their occupational definition. To facilitate classification, occupations are combined to form 23 major groups, 96 minor groups, and 449 occupation groups. Each occupation group includes detailed occupations requiring similar job duties, skills, education, or experience.

Notes

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