

Mesa State College

Listening to Business-Region 9- 2010

A Survey of Businesses in Western Colorado

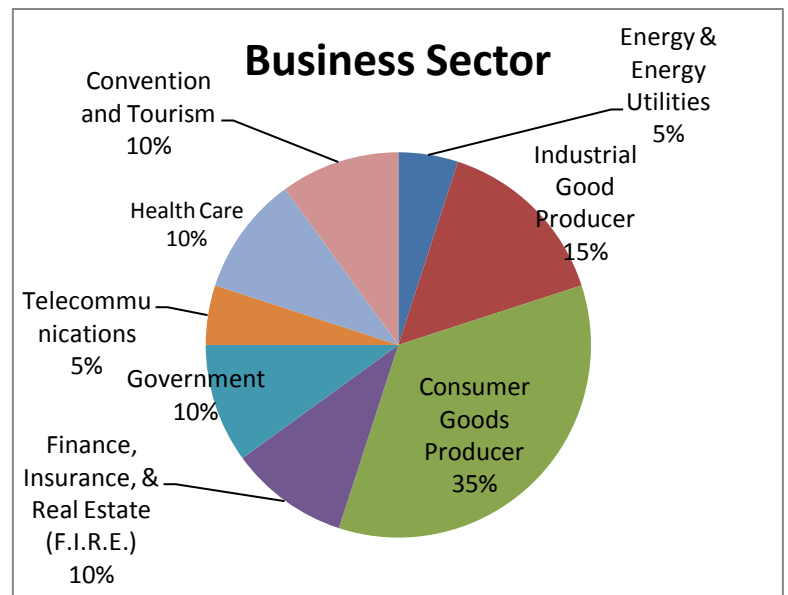
Listening To Business

BACKGROUND

Listening to Business (L2B) is a program that surveys the opinions and perceptions of businesses. The goal of the L2B program is to increase the success of local businesses by identifying trends, opportunities, and issues around which community resources can be aligned. The program was launched in 2004 by ED Partners, a group of public and private organizations focused on implementing unified economic development strategies in Mesa County, Colorado. As a result of the L2B program, Mesa County has successfully addressed several business climate issues and capitalized on opportunities to meet the needs of expanding business. Given the success of its county wide effort, the L2B program was expanded in 2008 across north western Colorado as part of the El Pomar Socio Economic Impacts of Growth study. The report that follows is part of a 2010 expansion of the project. This specific report isolates the data from Region 9 (Montezuma and La Plata Counties in Colorado) collected in the first quarter of 2010. The full regional report can be accessed at <http://www.mesastate.edu/business/documents>.

METHODOLOGY

The 2010 Listening to Business study presented in this report was sponsored by the El Pomar Foundation in collaboration with the western Colorado economic development organizations. As a participant in that study, Region 9 interviewed 20 businesses during the first quarter of 2010. The businesses were located in Montezuma and La Plata Counties and represented a diverse cross-section of the economy as displayed in the graph to the right.



The L2B program uses the e-Synchronist software program as a tool to gather, analyze, and confidentially report company data in aggregate form. This software provides a questionnaire giving a consistent collection format and the ability to compare the data collected. The software is being used by business retention and expansion programs throughout Colorado and the nation allowing relative comparisons and perspective to some of the data gathered.

The interview process provides a networking and learning opportunity for the business leaders who participate in the interviews. For this reason, this study utilized economic development professionals from each county to survey their county's businesses. The surveys were then collected and analyzed by the L2B Program Coordinator.

This type of study provides insight into the business's perceptions of strengths and weakness within the community. This report uses the data collected to frame the issues impacting each community enabling the communities involved to efficiently and effectively work on key issues.

The program has focused on interviewing companies that receive the majority of their income from outside the local economy i.e. *primary* business. In addition to bringing new dollars to the community, primary employers tend to pay a higher wage rate than secondary tier employers represented by the retail and service industries. Growth in this sector therefore exponentially improves the local economy.

The small sample size does not necessarily provide statistically reliable data, but these studies have proven to reveal real time anecdotal information and are especially useful for monitoring trends.

WHAT WE LEARNED

The e-Synchronist survey has seven sections probing issues regarding product, markets, industry, technology, management, workforce, and community service factors. Results are presented in the order they were collected in the survey. Since the sample size was limited, items are discussed if they are identified in more than three interviews.

PRODUCT

The first section of the survey and analysis attempts to determine where the companies are in terms of their primary product's market. The responses incorporate past achievements, product life cycle, technological developments, and amount of research and development occurring in each company. In Region 9 this first section shows that many of the companies interviewed continue to see their products in the growth stage of their life cycle. There was also huge increase in the number of companies viewing survival as an achievement over the last three years. The contrast between these two pieces of data seems to indicate the companies interviewed acknowledge the difficult economic times, yet are taking advantage of the downturn to strengthen their product offering and production efficiency.

Ninety-five percent of Region 9 companies interviewed have introduced new products in the last five years and are expecting to introduce new products in the next two years. This innovation is enabling

these companies to survive and grow. These companies have also committed investment in research and development to develop their products and make their production process more efficient again enabling them to grow and expand their business in difficult economic conditions.

MARKETS

The market section of the survey shows that, though the sales growth trend has slowed significantly since 2008, 75% of the companies interviewed had increasing or stable sales. This accomplishment comes from companies introducing new products and developing new markets for their products as well as increasing production efficiency and introducing new technology. In terms of potential growth, over 95% of the companies interviewed are increasing or at least maintaining market share, positioning them for increasing sales as the economy recovers.

Sixty-one percent of the businesses interviewed are planning to expand.

Projected Total Investment Region 9 (5 years)

	Estimated Dollar Investment	Estimated New Space (ft²)	Estimated Jobs created
High	\$20,000,000	15,000	40
Low	\$0	0	0
Average	\$2,504,167	3,725	10
Total	\$30,050,000	44,700	122

While two big projects make up half of the expansion, regionally the estimated dollar investment and job creation is still up significantly when compared to 2008 projections. The trend for job creation continues, with Region 9 companies interviewed expecting a 16% expansion of their current workforce. In 2008, the companies interviewed projected only a 7% increase in their workforce.

INDUSTRY

Industry consolidation pressures appear to have eased since 2008. Though 35% see their industries as being over capacity, more companies believed their industries competitive environment would be able to absorb more competitors. Twenty percent of those interviewed thought their competitive environment was balanced.

The ability of government entities to impact business is viewed as a major concern for most of the companies. Most of the concern was in terms of federal legislation and state regulation. The issues seen as having potential negative impact include:

- health care reform legislation,
- small business taxes,
- regulation, and
- access to financing.

The concern over the negative impact of pending legislation voiced by businesses has increased substantially since the 2008 survey—from 66% in 2008 to 80% in 2010, though fifty percent of Region 9 participants felt that they may benefit from upcoming legislation.

MANAGEMENT

Management is projecting moderate growth over the next three years that will be spurred by the product, market, and industry trends outlined above. The confidence in the community's ability to support that growth is brought to light by their perceptions of the community's strengths and weaknesses. While quality of life is consistently perceived as community strength throughout western Colorado, Region 9 businesses also considered Fort Lewis College, work ethic in the local work force, and government services to be strengths of the their community.

Region 9 businesses interviewed felt their community's primary weaknesses were due to the high cost of doing business. Specifically, county zoning regulation, availability and cost of land, and lack of skilled workforce were viewed as barriers to growth and reasons the Region 9 community may not be considered for company expansion.

WORKFORCE

The fifth section of the survey covers issues pertaining to the available local workforce. The perceived availability of workers has risen since the 2008 study, though the availability of workers in Region 9 is still below regional, state and national ratings. The perceived quality of the workforce also rose. It is interesting to note that in the 2008 study the lower quality rating was attributed to lack of work ethic, dependability, and drug usage—these attributes were not mentioned in this study. In fact work ethic was ranked as community strength, as previously mentioned.

Workforce Skill Gaps

The most frequently mentioned workforce skill gaps included:

- Sales and Marketing
- Management
- Health Care
- Machinists

Sixty percent of those interviewed had recruiting problems (up from 12% in 2008 in a much tighter labor market). These recruiting problems were almost primarily attributed to community issues (lack of skilled workers) versus industry issues.

COMMUNITY SERVICES

Most community serves were consistent with regional, state, and national ratings. Region 9 ranks child care consistent with the region as a whole but significantly lower than state and national surveys. Comments regarding this ranking discussed the difficulty employees have in finding professional child care.

Air Cargo service was also ranked considerably lower than regional, state and national ratings. The only comment clarifying the rating was regarding the need for international services. This ranking is consistent with the previously mentioned weakness regarding location and the difficulty getting supplies shipped in and accessing markets.

Zone changes and building permits was also ranked below 4. This is also consistent with the findings in the community weakness section of the survey.

CONCLUSION

The 2010 regional Listening to Business interviews revealed a stable business climate in which businesses are anticipating growth. The data collected in this study disclosed that most of the businesses interviewed project stable or are increasing sales even in difficult economic conditions. The companies are working to gain market share by introducing new products and expanding their market area. Companies are also focusing on increasing their production efficiency.

These businesses are competing with regional, national, and international companies. The majority of the businesses interviewed project to invest in their businesses and many will create jobs.

Region 9 businesses perceive their community's quality of life as its primary community strength. Like many businesses in western Colorado, Region 9 businesses view the high cost of land and transportation weaknesses as possible barriers to growth. Some of the high costs of business are unique to the western Colorado rural environment. High cost of air and ground transportation is due to the geographic terrain and distance between communities. Relative high cost of land can, in part, be attributed to the pull for use of this resource in the recreation industry (skiing, tourism, second-home), a factor unique to western Colorado when compared to the rest of the state.

Availability of quality child care for area employees continues to be a concern for employers, as does the ability to recruit skilled employees, in general. Businesses also voiced a growing concern that increased state and national legislation may add to their cost of doing business.

The ability to deal with these cost pressures, as well as recruit an educated workforce, will determine whether Region 9 businesses continue to compete successfully in their growing markets, thus creating a healthy local economy.

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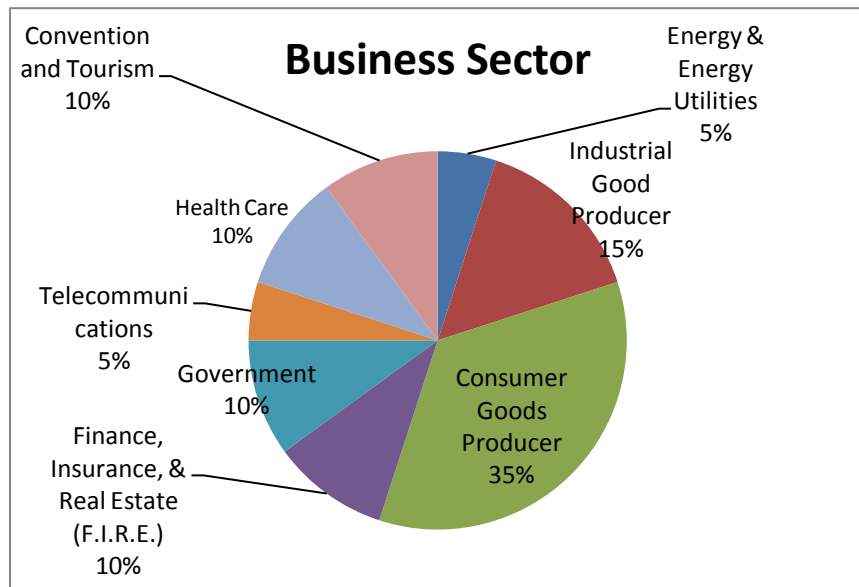
Listening To Business-Region 9 County 2010

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PRODUCT

The first section of the survey and analysis attempts to determine where the companies are in terms of their primary product's market. The responses incorporate past achievements, product life cycle, technological developments, and amount of research and development occurring in each company. This analysis provides a background of a company's operation over the past five years and how they are positioned to capitalize on upcoming opportunities and changes.

Achievements

Fifty-two percent of the companies interviewed saw *development of new markets and market expansion* as their greatest achievement in the past five years. This development was stated in terms of licensing agreements, new contracts, new buildings, and additional locations. Twelve percent saw *growth* as their primary achievement. Growth is similar to market expansion but stated in terms of higher sales and expanded workforce. When this same survey was completed in 2008, 47% of those responding saw growth as their primary achievement.



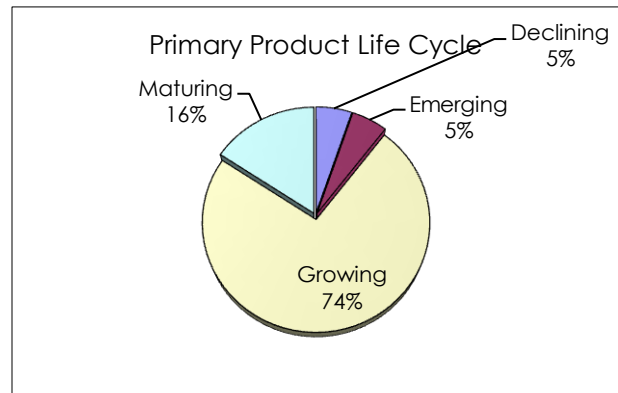
In contrast, in the current survey 24% of those responding saw their greatest achievement as *survival*. Survival was talked about in terms of weathering current economic conditions while setting a foundation for the future. Survival was not mentioned as an achievement in the 2008 survey.

In the 2010 regional survey, growth and survival were the top two achievements, but in addition Region 9 businesses also considered *market expansion and development of new markets* and *implementation of new technology* as significant achievements --indicating that these businesses are surviving the downturn through innovation and market development positioning their businesses to take advantage of any economic recovery.

Life Cycle

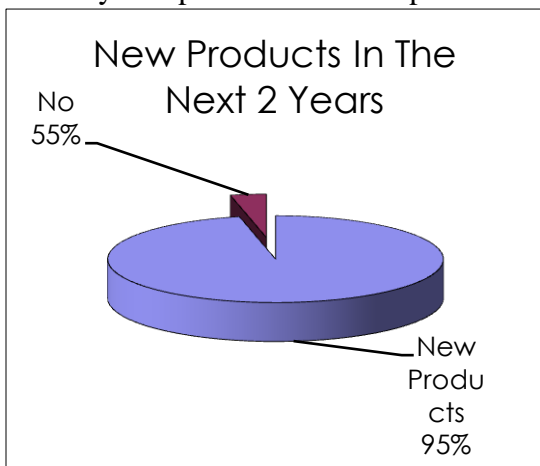
A large number of the participating companies interviewed (74%) classified their primary products in the *growth* stages of the product life cycle. Only 5% saw their primary product in the *declining* state and another 5% viewed the product in the *emerging* stage. Sixteen percent of the interviewed companies' products are in the mature stage of the life cycle.

These numbers represent the mix of the companies selected, not necessarily the make-up of the regional economy. For comparison, national survey data shows most communities have more companies with products in the mature stage of the life cycle. Western Colorado data has consistently shown more companies in the growth stage of the life cycle.



Product Development and Innovation

Ninety-five percent of the companies interviewed have introduced new products in the last five years and the same number of companies expect new products in the next two years both of the numbers show an increase over the 2008 regional study indicating that even in a much softer economy companies continue to invest in their company's future.



Eighty percent of the companies responding budget money on research and development; with 30% spending less than 3% of their sales on research and development while 35% spend over 3% on research and development. Ten percent have no actual R & D budget. For those responding, the majority were spending their research dollars on *new product development*, though almost half

were spending over 20% of their R & D budget on *product improvement*, and over a fourth of those interviewed spend greater than 20% on *production improvement*. The increase in research and development is consistent with increase in introduction of new products and market growth.

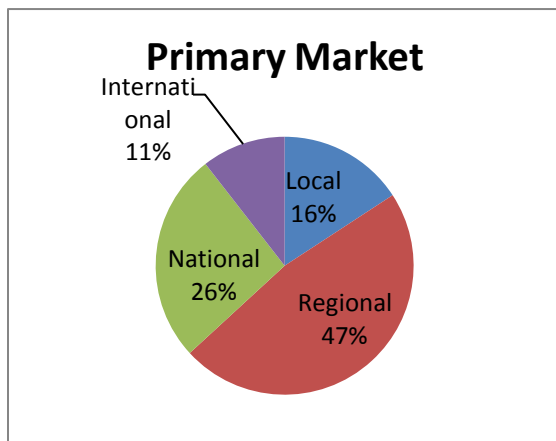
This first section of the study shows that many of the companies interviewed continue to see their products in the growth stage of their life cycle. This number is interesting when juxtaposed with huge

increase in the number of companies viewing survival as an achievement over the last three years. This seems to indicate the companies interviewed acknowledge the difficult economic times, yet are taking advantage of the downturn to strengthen their product offering and production efficiency.

Ninety-five percent of Region 9 companies interviewed have introduced new products in the last five years and are expecting to introduce new products in the next two years. This innovation is enabling these companies to survive and grow. These companies have also committed investment in research and development to develop their products and make their production process more efficient again enabling them to grow and expand their business in difficult economic conditions.

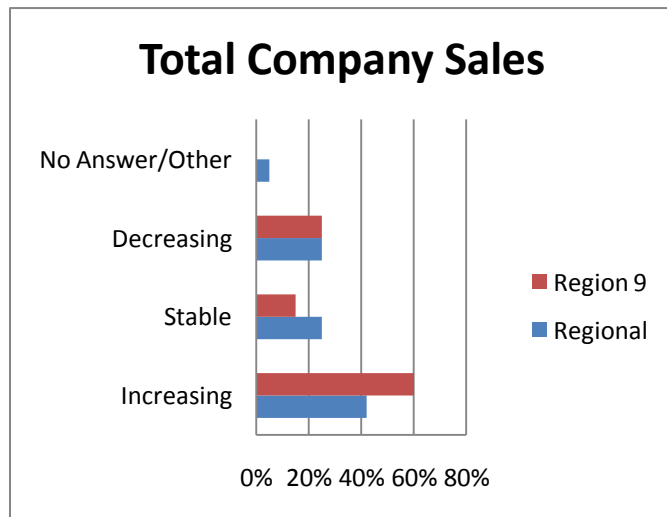
MARKETS

The next section of the survey provides insight into how effectively the companies are competing in their respective industries. Items such as market share, sales, plans for expansion, and international influences are discussed.



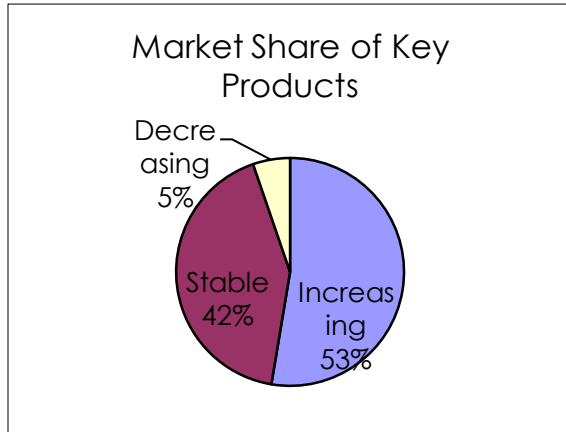
Forty-seven percent of the companies interviewed view their primary market as being regional (Rocky Mountain states). National markets make up the primary market for 26 percent of the companies. Eleven percent of those interviewed sell to an international market. Sixteen percent of those interviewed regarded the local market as contributing to the majority of their sales. Though the study focused on primary business, many of those interviewed had begun to market locally during the economic downturn.

The sales growth trend for the companies interviewed has shifted significantly from the 2008 study. In 2008, 76 % of regional participants had increasing sales, compared to 42% in 2010. Sixty percent of Region 9 companies reported increasing sales. Twenty-five percent of regional companies interviewed saw their sales decreasing compared to only 4% with decreasing sales in 2008. Region 9 companies were consistent with regional trends in terms of decreasing sales; yet were much stronger than the region as a whole when comparing increasing sales trends.



Though this change is significant, it should be recognized that 75% of the Region 9 companies interviewed had increasing or stable sales; an accomplishment when comparing economic conditions in 2009-10 versus the hyper-growth conditions occurring in 2008.

In a recession a better indicator of the future viability of the selected companies may be their market share. In other words—the whole pie is shrinking; therefore, so are company sales. But what



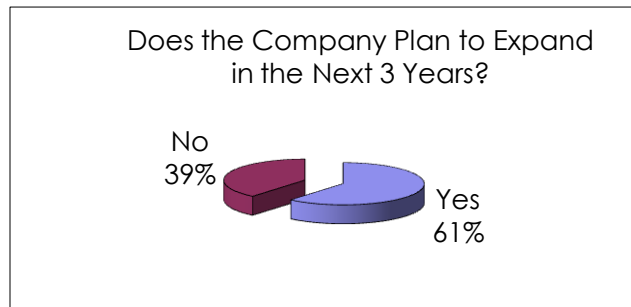
percentage of the pie is the company getting in order to position themselves for more sales when industry growth resumes—or the pie expands. Fifty-three percent of those interviewed see their market share as increasing with 42% seeing their market share as stable.

The increasing or stable market share in a shrinking economy was attributed to several factors including:

- New markets/products
- Implementation of new technology
- Increasing production efficiency

Sales and market share trends translate into 61% of the interviewed companies planning to expand within the next three years. This is 12% increase in companies planning to expand over 2008 data (49%); again this is significant considering the regional economy was viewed as being in a hyper-growth phase in 2008.

The planned expansion results in over \$30 million being invested in the area over the next five years. It should be noted that just over 65% of that investment (\$20 million) comes from one company in the tourism industry and one third of job creation comes from that same entity. Just over 35% percent of the building expansion comes from one education entity. The other workforce expansion spread over ten companies adding between 1 to 20 positions to their workforce.



Projected Total Investment Region 9 County (5 years)

	Estimated Dollar Investment	Estimated New Space (ft ²)	Estimated Jobs created
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The market section of the survey shows that though the sales growth trend has slowed significantly since 2008, 75% of the companies interviewed had increasing or stable sales. This accomplishment comes from companies introducing new products and developing new markets for their products as well as increasing production efficiency and introducing new technology. In terms of potential growth, over 95% of the companies interviewed are increasing or at least maintaining market share, positioning them for increasing sales as the economy recovers.

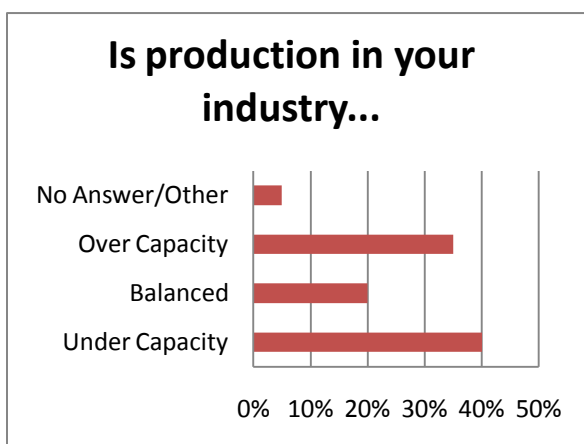
Sixty-one percent of the businesses interviewed are planning to expand. While two big projects make up half of the expansion, regionally the estimated dollar investment and job creation is up significantly when compared to 2008 projections. The trend for job creation continues, with Region 9 companies interviewed expecting a 16% expansion of their current workforce. In 2008, the companies interviewed also projected a 7% increase in their workforce, yet the economic conditions in 2008 were very different.

INDUSTRY

The third section of the L2B questionnaire researched the viability and competitive factors of the industry in which these companies are competing. This section looks at factors internal to the industry such as consolidation and capacity, as well as external influences of potential legislation and regulation.

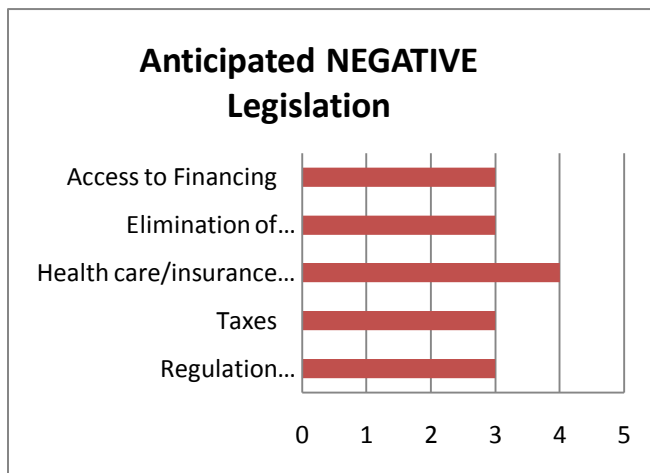
Merger and Acquisition

Fifty percent of the companies surveyed thought that merger, acquisition, and divestiture activity was increasing in their industry. This is down from 69% experiencing increased activity in their industry in 2008. It is significant to note that 50% of those interviewed declined to comment on or did not know the consolidation pressure in their industry. This type of activity reflects companies combining to gain market share or enter new markets as well as companies being sold to get out of markets. Reduced consolidation pressure translates to local businesses not having as many buyers for their business; increased consolidations could indicate that companies could be purchased and leave the community.



Industry Capacity

Twenty percent of those interviewed believed that production capacity was balanced in their industry –there are enough businesses supplying market demand. Forty percent thought there was room for more competitors and thirty-five percent view their industry as having too many competitors for the market demand.



Legislative and Regulatory Concerns-Negative

The impact of legislation and regulation continues to be a concern for area businesses. Eighty percent of the companies interviewed perceived that pending local, state, or national legislation would adversely impact their business (compared to 66% in 2008). The legislative issues specifically mentioned that had potential negatively influenced business are summarized in the chart to the left. It is interesting to note that Region 9 businesses were more concerned about access to

financing than other businesses in the 2010 regional study. Health care reform, taxes and increased regulation were also mentioned as concerns in Region 9 and throughout the study region.

Legislative and Regulatory Concerns-Positive

In Region 9 fifty percent of respondents believed there could be legislation that benefited their business in the next three years. In contrast in the 2010 regional study as a whole only 26 percent of those interviewed anticipated potential local, state, and federal legislation that would benefit their company. The potential positive legislative issue did not show any specific trend but included change in administration and reduction in taxes.

Industry consolidation pressures appear to have eased since 2008. Though 35% see their industries as being over capacity, more companies believed their industries competitive environment would be able to absorb more competitors. Twenty percent of those interviewed thought their competitive environment was balanced.

The ability of government entities to impact business is viewed as a major concern for most of the companies. Most of the concern was in terms of federal legislation and state regulation. The issues seen as having potential negative impact include:

- health care reform legislation,
- small business taxes,
- regulation, and
- access to financing.

Though half the respondent believed there could be positive legislative outcomes there was not trend on specific items mentioned.

The concern over the negative impact of pending legislation voiced by businesses has increased substantially since the 2008 survey—from 66% in 2008 to 80% in 2010, though a fifty of Region 9 participants felt that they may benefit from upcoming legislation.

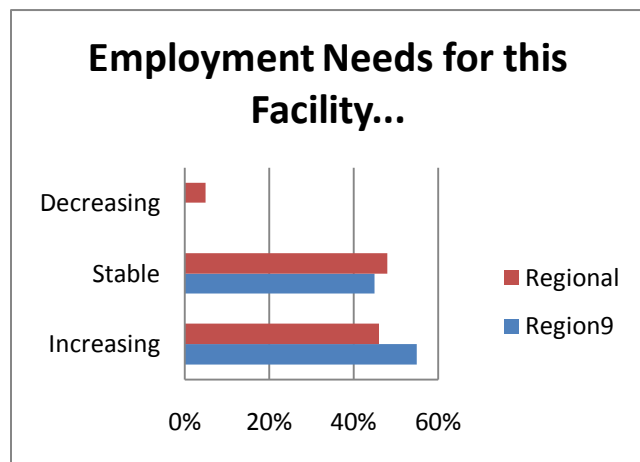
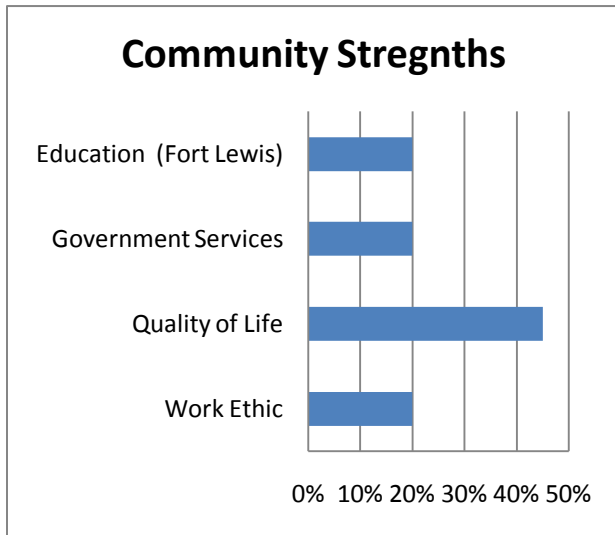
MANAGEMENT

The fourth section of the survey provides insight into expected changes in management, employment, and the effect of management decisions. This section also shows the perception of management towards the local business environment as a place to do business.

Ownership of the interviewed companies has been fairly stable with only 25 percent seeing a change in the past 18 months. Declining industry consolidation pressures mentioned in the previous businesses is consistent with the low ownership changes experiences or expected by local businesses. Fifteen percent have experienced or are expecting to change in management in the next 18 months. The volatility in the top management has decreased significantly down from 59% of companies changing top management in the 2008 regional report. This indicates a change in the labor market, with skilled employees no longer changing jobs as much as in a tighter job market.

The employment needs will be increasing in 55% of the companies interviewed; 45% view employment needs as stable, and none of the companies interviewed project decreasing employment needs. For comparison, the Listening to Business survey completed in 2008 in western Colorado had 55% of employers expecting an increase in needed employees.

Perceived Community Strengths



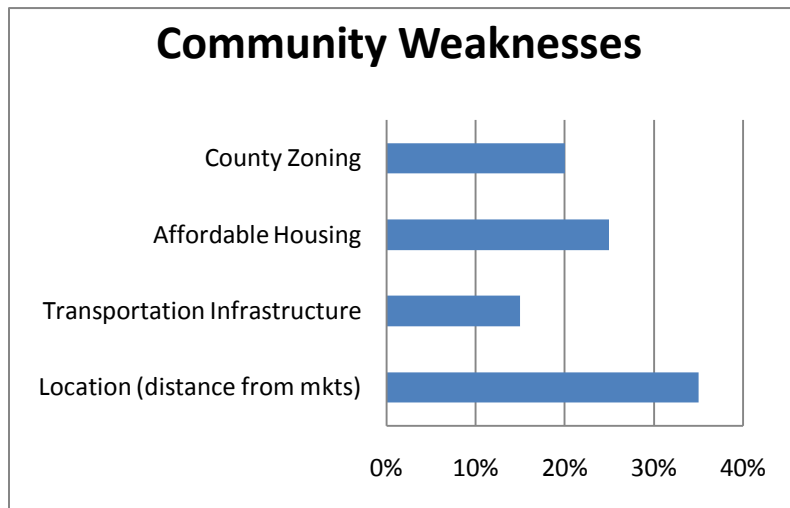
Forty-five percent of those interviewed said that a *quality of life* was strength of their community. Quality of life is consistently one of the top community strengths in western Colorado (20% in 2008). Included in this response were comments pertaining to the climate, small town atmosphere, and support of local businesses.

Work ethic was mentioned by 20 percent of respondents as community strength. Fort Lewis College was specifically as a community strength by 20 percent of respondents, as were government services.

Perceived Community Weaknesses

Location was the most cited community weakness; this was described primarily in terms of the difficulty of getting resources and distance to markets. Transportation infrastructure also had to do with travel in and out the community (air/vehicle).

Region 9 respondents also discussed affordable housing and county zoning as community weaknesses. These issues should up in prior surveys in other areas of western Colorado, but did not specifically show a trend in other areas in this survey.



Perceived Barriers to Growth

To assess whether community weaknesses are actually affecting the economic viability of the community, businesses are asked about actual barriers to growth. Specific barriers to growth were:

- County land use regulation
- Lack of industrial space
- Difficulty in attracting a skilled workforce.

These threats to business retention and expansion were confirmed as potential issues when businesses were asked for the reasons the community may not be considered for expansion. Forty percent of those interviewed said that there was potential that the community would not be considered for future expansion. The most cited reasons had to do with the high cost of doing business due to availability and cost of industrial and residential space. In 2008, cost of living, negative business climate, and workforce were viewed as actual barriers to growth.

Management is projecting moderate growth over the next three years that will be spurred by the product, market, and industry trends outlined above. The confidence in the community's ability to support that growth is brought to light by their perceptions of the community's strengths and weaknesses. While quality of life is consistently perceived as community strength throughout western Colorado, Region 9 businesses also considered Fort Lewis College, work ethic in the local work force, and government services to be strengths of the their community.

Region 9 businesses interviewed felt their community's primary weaknesses were due to the high cost of doing business. Specifically, county zoning regulation, availability and cost of land, and lack of skilled workforce were viewed as barriers to growth and reasons the Region 9 community may not be considered for company expansion. To clarify the workforce strength (work ethic) and weakness (lack of skilled workers), businesses stated that in their businesses they had a lot of loyal and high quality workers, but recognized that they paid for that expertise (higher salaries) and that the pool of skilled workers appeared limited.

WORKFORCE

The fifth section of the e-Synchronist survey covers issues pertaining to the available local workforce. Questions review quality, stability, productivity and training needs.

The table below summarizes the overall evaluation of the local workforce as rated on a 1-7 scale, with one being poor and seven excellent.

	2010 Region 9	2010 Region al	2008 Regional	2010 Colorado	2009 National
Availability	4	5	3	5	5
Quality	5	5	3	5	5
Stability	4	4	4	5	5
Productivity	6	6	6	4	6

The perceived availability of workers has risen since the 2008 study, though the availability of workers in Region 9 is still below regional, state and national ratings. The perceived quality of the workforce also rose. It is interesting to note that in the 2008 study the lower quality rating was attributed to lack of work ethic, dependability, and drug usage—these attributes were not mentioned in this study. In fact work ethic was ranked as community strength, as previously mentioned. Sixty percent of those interviewed had recruiting problems (up from 12% in 2008 in a much tighter labor market). These recruiting problems were almost primarily attributed to community issues (lack of skilled workers) versus industry issues.

Workforce Skill Gaps

The most frequently mentioned workforce skill gaps included:

- Sales and Marketing
- Management
- Health Care
- Machinists

While skills needed specifically reflect the mix of companies interviewed, it is interesting to note that the most mentioned skill gaps—Sales and Management—are general business skills.

COMMUNITY SERVICES

The final section of the survey reviewed services provided by the community and government entities.

Community Services Rating

The following public services are rated on a scale of one to seven (seven being highest).

Community Services Ranking

1-Low, 7-High	Region 9 2010	Regional 2010	Colorado 2010	National 20092
Police protection	5.75	5	5.6	5.54
Fire protection	5.85	6	5.9	5.89
Ambulance paramedic	6.1	4	5.9	5.81
Health Care	4.75	5	5.4	5.35
Child Care	3	3	4.3	4.82
Schools (K-12)	4.53	4	4.9	5.03
Technical School	4.25	NA	4.4	5.18
Community College	5.00	5	5.5	5.48
College and University	5.65	4	5.5	5.53
Public Transportation	3.2	4	4.1	3.89
Traffic Control	4.17	4	4.7	4.38
Streets & Roads (local)	4.05	4	4.8	4.45
Highways	4.58	4	4.8	4.87
Airline Passenger Service	4.25	4	4.9	4.64
Air Cargo Service	3.75	4.45	5	5.14
Trucking	4.72		5	5.41
Property Tax assessment	4.63	5	4.2	4.23
Zoning Changes & Bldg permits	3.94	NA	5.1	4.39
Community Planning	5.12	4	4.5	5.03
Regulatory enforcement	4.00	4	4.5	4.7
Community Services	4.06	4	na	
County services	4.47	NA	4.9	4.91
Chamber of Commerce	5.53	5	5.3	5.38
Economic Development Organization	4.72	4	5.1	5.5
Workforce Center	4.33	NA	4.7	NA

Region 9 ranks child care consistent with the region as a whole but significantly lower than state and national surveys. Comments regarding this ranking discussed the difficulty employees have in finding professional child care.

Air Cargo service was also ranked considerably lower than regional, state and national ratings. The only comment clarifying the rating was regarding the need for international services. This ranking is consistent with the previously mentioned weakness regarding location and the difficulty getting supplies shipped in and accessing markets.

Zone changes and building permits was also ranked below 4. This is also consistent with the findings in the community weakness section of the survey.

CONCLUSION

The 2010 regional Listening to Business interviews revealed a stable business climate in which businesses are anticipating growth. The data collected in this study disclosed that most of the businesses interviewed project stable or are increasing sales even in difficult economic conditions. The companies are working to gain market share by introducing new products and expanding their market area. Companies are also focusing on increasing the production efficiency.

These businesses are competing with regional, national, and international companies. The majority of the businesses interviewed project to invest in their businesses and many will create jobs. Region 9 businesses perceive their community's quality of life as its primary community strength.

Like many businesses in western Colorado, Region 9 businesses view the high cost of land and transportation weaknesses as possible barriers to growth. Some of the high costs of business are unique to the western Colorado rural environment. High cost of air and ground transportation is due to the geographic terrain and distance between communities. Relative high cost of land can, in part, be attributed to the pull for use of this resource in the recreation industry (skiing, tourism, second-home), a factor unique to western Colorado when compared to the rest of the state.

Availability of quality child care for area employees continues to be a concern for employers, as does the ability to recruit skilled employees, in general. Businesses also voiced a growing concern that increased state and national legislation may add to their cost of doing business.

The ability to deal with these cost pressures, as well as recruit an educated workforce, will determine whether Region 9 businesses continue to compete successfully in their growing markets, thus creating a healthy local economy.
