



COLORADO MESA
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HORIZON DRIVE DISTRICT ECONOMIC IMPACT & TRAFFIC REPORT 2011

**This report prepared by
the Social Science Research Center at
Colorado Mesa University**

Horizon Drive District Economic Impact and Traffic Report 2011

John Redifer, Jim Curtsinger, Georgann Jouflas, and Maureen McCarney

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EXECUTIVE SUMMARY

The Horizon Drive District (HDD) was created on April 7, 2004. The District's Board of Directors is interested in promoting the economic viability of the businesses in the District as well as contributing to the overall economic success of the City of Grand Junction and Mesa County. Due to its proximity to the Grand Junction Regional Airport and a major interchange for Interstate 70, the Horizon Drive District has been seen by many as the "Gateway to Grand Junction." Consequently, the Horizon Drive District and its associated businesses play an integral role in the economic prosperity of the region.

In order to better understand the impact the Horizon Drive District has on the area's economic health and to assist with planning for the District's future the HDD Board of Directors contracted with Mesa State College to study the impact the District's businesses have on the area's economy. In addition Mesa State College was also asked to collect data on traffic flows and safety along Horizon Drive as well as passenger flows through the Grand Junction Regional Airport.

Collecting data on economic activity for a business district is difficult as the local and state agencies that collect economic data do not usually report it by business district. Additionally, much of the economic data needed for a full analysis is confidential. As a result, revenue data and data on expenses needed for effective economic forecasting is not available. However, data on property values and taxes was available through the Mesa County Assessor's Office. Data on building usage and office vacancies was available from the City of Grand Junction. Employment and wage data was obtained from the Colorado Department of Labor and Employment. Traffic flow and safety information came from records obtained from the Colorado Department of Transportation while airport data came from the Grand Junction Regional Airport.

The data collected from these sources provides a fairly good picture of the role the Horizon Drive District plays in the local economy. To complete this picture, investigators at Mesa State College used the Listening to Business program to survey the opinions and perceptions of businesses in the Horizon Drive District. The following results of this study reveal that the Horizon Drive District is a vital part of the Grand Junction and Mesa County economy and is poised to make an even greater contribution in the future.

Findings

Data on traffic counts and safety provide evidence of the importance of Horizon Drive as the first impression of Grand Junction for many visitors. While accidents at the Horizon Drive-Interstate 70 interchange are small, the number of accidents is increasing. In 2009, the Horizon Drive exit accounted for more than fifty percent of all Grand Junction highway interchange accidents.

Because of the proximity to the Grand Junction Regional Airport, as well as a major Interstate-70 interchange; Horizon Drive truly is the "Gateway to Grand Junction". Although Clifton may have more traffic exiting on to I-70B, much of the difference is caused by truck traffic. An attractive "gateway" is important in promoting the city to perspective businesses seeking to locate here. This also is important for non-location specific entrepreneurs or wealthy, active retirees looking for a high quality of life when seeking a place to relocate.

Despite the fact that HDD taxable retail sales is a small portion of Grand Junction's overall retail activity, it still creates almost \$60 million of economic output for Mesa County as a result of initial sales in the District. Roughly fifty percent of these sales come from customers living outside of Mesa County. In 2010, overall HDD retail sales, taxable and nontaxable, was over \$100 million. This is 2.3% of the total retail sales in Mesa County.

The examination of building usage indicates the important contribution the District makes to tourism in the region. Over seventy percent of the lodging space in Grand Junction is located in the Horizon Drive District. With over 2,200 rooms available at an average daily rate of \$81.95 in 2010, the District generated 63% of the city's lodging tax.

The Horizon Drive District also is an important source for office space in Grand Junction. In January 2011, the District contained over one-fourth of the office space in the City of Grand Junction. Roughly one-third of the vacant office space in Grand Junction is located within the Horizon Drive District. There is also a significant amount of vacant land available for commercial and industrial development. The HDD has the potential to attract businesses requiring easy access to I-70 or the airport.

Property values for commercial property in the Horizon Drive District have increased dramatically from 2006 to 2010. Consequently, property taxes assessed on Horizon Drive District commercial property owners have increased as well. As a percentage of the total assessed taxes on commercial properties for Grand Junction and Mesa County, the HDD contributed 7.52% and 5.08% respectively.

Employment and wage data from the Colorado Department of Labor and Employment was available for 144 of the 227 businesses operating in the Horizon Drive District in 2010. These businesses employed 2,614 employees or almost five percent of the total Mesa County workforce. The wages paid to those employees also account for almost five percent of the total wages paid to employees in the county. The average wage of HDD employees in 2010 was \$40,856 which is over \$2,900 higher than the average wage in Mesa County. According to an analysis of employment data available on 144 of the businesses in the district, these businesses add over \$300 million in direct, indirect, and induced economic value to the Mesa County economy. These impacts are from employment data alone and do not consider business income or other spending that would add to this amount.

The 2011 Horizon Drive District Listening to Business report shows a healthy, but guarded business climate. Most businesses are stable with a few growing slightly. Those interviewed were concerned with the potential for increased legislative and regulatory impact on the business environment. This concern translated into hesitancy in investment and hiring. The primary sector businesses are competing mostly for a regional market. This survey shows that traditionally local-based market businesses in the retail and service sectors also serve a regional market with at least 50 percent of their customers coming from a 50 to 100+ mile range.

Companies were pleased with the local business environment and quality of life offered by the community. They viewed locating their business in Grand Junction to be a strength. Businesses did not find the community to have any major weaknesses or actual barriers to growth.

The businesses that are continuing to grow have attributed their success to survival and the ability to gain market share in a down economy. The HDD businesses service a regional market bringing new dollars into the Mesa County economy. These businesses can be supported by increasing their ability to access the regional market.

Businesses will need to be confident in the stability of the local economy before they will invest capital in their businesses. A major factor in this confidence is the ability to predict the impact of the regulatory and tax environment. Businesses expressed their concern about the state and federal regulatory environment in this study. Economic Development agencies can help businesses with this issue by being an advocate for businesses on a state and national level, especially on issues that have local impact. This will help build confidence in the predictability and stability of the local economy and promote investment.

According to survey participants, items that would positively impact HDD businesses that can be influenced by the Horizon Drive District Include:

- Curb Appeal
- Traffic Flow
- Pedestrian and bicycle safety

Assistance in these areas by the City of Grand Junction, Mesa County and the State of Colorado will promote the area's economy by increasing the Horizon Drive District's contribution to growing the area's tourism industry, promoting the area as an attractive location to relocate new businesses and encouraging active retirees to relocate to the area.

Conclusion

The Horizon Drive District is an important part of the Grand Junction and Mesa County economy. The District provides support of the area's tourism industry by providing almost three-quarters of the lodging space available in the city. The District also provides one-fourth of Grand Junction's office space. With easy access to the airport and I-70 it is particularly attractive to many industries seeking easy access to transportation outside of the county.

The value of commercial activity in the area is supported by the analysis of property values and taxes which have increased significantly from 2006 to 2010. Additionally, much of the business conducted in the District is done with regional customers bringing new money into the local economy. Employment and wages paid by District businesses comprise almost five percent of the jobs and wages in Mesa County. Of even greater significance is that District employees, on average, earn almost \$3,000 more than the average employee in Mesa County on an annual basis. Most of the income generated by businesses in the Horizon Drive District comes from regional customers living 100 miles or more from the District.

Businesses responding to the Listening to Business Survey indicated help improving curb appeal, traffic flow and pedestrian and bicycle safety would offer the most assistance for improving the business climate.

Introduction

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Traffic Data

Traffic Counts

Traffic counts are an excellent way to evaluate the economic vitality of a business district. This is particularly important when the business district is located on a major gateway to a community. Traffic counts taken at the Horizon Drive – I-70 interchange reflect the important role that the Horizon Drive District plays as a "Gateway to Grand Junction". Table 1 compares traffic counts for this interchange with the Clifton – I-70 interchange. In all cases, the counts presented east-bound and west-bound exits separately and offered a composite or total of those two exits for each day.

In 2009, two days of counts were taken at Horizon Drive: Tuesday, September 29th and Wednesday, September 30th. Only one day's traffic was counted at Clifton on Thursday, July 23rd. Only one day's counts were available for 2008; both exits were counted on June 25th. Counts were taken at

both locations on Wednesday, July 11th in 2007. In 2006, counts were available for Wednesday, June 14th and Thursday, June 15th for Clifton, but no Horizon Drive count was taken that year. In 2005, the count, at Clifton, was taken on Tuesday, June 7th. No Horizon Drive count was taken in that year. The dates counts were taken in 2004 were August 24th (Tuesday) and 25th (Wednesday). These counts were taken at both locations.

The table below shows the results of compiling the traffic data from 2004 until 2009.

Table 1: Travel Counts 2004-2009

| | 2009 | 2008 | 2007 | 2006 | 2005 | 2004 |
|---------------------------|---------|---------|---------|---------|---------|-------|
| Horizon East Day 1 | 10897 | 13800 | 14739 | No Data | No Data | 8724 |
| Horizon West Day 1 | 10199 | 13900 | 13617 | No Data | No Data | 8637 |
| Horizon East Day 2 | 10302 | No Data | No Data | No Data | No Data | 8894 |
| Horizon West Day 2 | 10267 | No Data | No Data | No Data | No Data | 8946 |
| Composite H Day 1 | 21096 | 27700 | 28356 | No Data | No Data | 17361 |
| Composite H Day 2 | 20569 | No Data | No Data | No Data | No Data | 17840 |
| Clifton East Day 1 | 12856 | 13860 | 14605 | 14520 | 15092 | 11633 |
| Clifton West Day 1 | 14166 | 15004 | 14135 | 14229 | 12576 | 11462 |
| Clifton East Day 2 | No Data | No Data | No Data | 14891 | 15498 | 12019 |
| Clifton West Day 2 | No Data | No Data | No Data | 15033 | 13114 | 13200 |
| Composite C Day 1 | 27022 | 28864 | 28740 | 28749 | 27668 | 23095 |
| Composite C Day 2 | No Data | No Data | No Data | 29924 | 28612 | 25219 |

Source: Colorado Department of Transportation

Composite H: Combined east and west traffic at Horizon Drive exit

Composite C: Combined east and west traffic at Clifton exit

As this graph shows, the Clifton exit has consistently higher counts. Since CDOT does not distinguish in this data between truck and automobile traffic, it may be that the higher number for Clifton may represent its position as an access point to the I-70 Business loop. Since truckers making deliveries in Grand Junction would be more likely to select the business loop as access to a variety of points—rather than taking the route through town that Horizon connects to—a higher volume of traffic is not surprising. Still the traffic entering Horizon Drive from I-70 is both considerable and trending upwards until the recession of 2008.

Accident Reports

Safety is an important component for promoting the economic activity in any business district. Table 2 compares the number of accidents at the Horizon Drive off-ramp; Horizon Drive and G Road; all other Grand Junction highway interchanges; and all other Grand Junction highway intersections.

These statistics were gathered from the City of Grand Junction's yearly traffic reports. The number of accidents for the two Horizon Dr. locations comes from years when those two locations were included in the frequency table of that report. Only locations with 5 or more accidents are included in those tables, so in years where a zero appears it indicates that fewer than 5 accidents occurred at those intersections.

In the Grand Junction traffic reports a highway interchange is interpreted to mean any exit from I-70 that leads to Grand Junction, of which Horizon Drive is one of four. The "all highways" data represents any intersection, for example I-70B and North Avenue, of a highway and a surface street in Grand Junction.

Table 2: Accident by Location II 2005-2009

| | 2009 | 2008 | 2007 | 2006 | 2005 |
|-------------------------|------|------|------|------|------|
| I-70 and Horizon | 6 | 5 | 0 | 0 | 0 |
| Horizon/G | 0 | 7 | 8 | 6 | 0 |
| Hwy Interchange | 11 | 11 | 9 | 19 | 18 |
| All Hwy | 62 | 86 | 92 | 80 | 68 |

Source: City of Grand Junction

Both the Horizon Drive exit and Horizon Drive and G appear intermittently in the frequency tables of the Grand Junction traffic report. They do not seem to have an inordinately high number of accidents in comparison to other similar locations. However, accidents at the Horizon Drive interchange are trending upward. By 2009 these accidents account for over half the accidents occurring at all four Grand Junction I-70 interchanges.

Bicycle and Pedestrian Accident Reports

Walk-by traffic is important for retail business. Safety is a key factor for increasing walk-by traffic. The number of pedestrian and bike accidents on Horizon Drive is summarized in Table3.

Table 3: Pedestrian and Bicycle Accidents 2005-2009

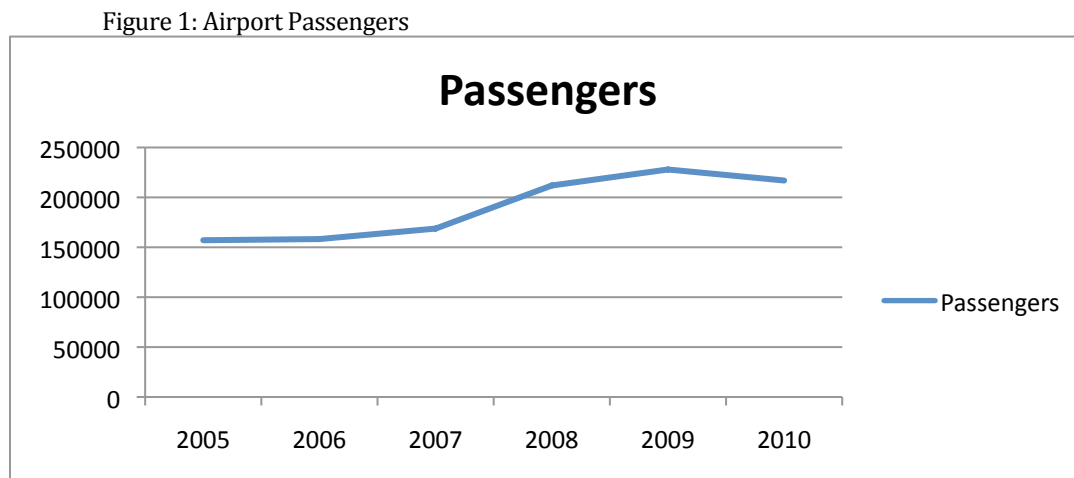
| | 2009 | 2008 | 2007 | 2006 | 2005 |
|----------------------------|------|------|------|------|------|
| Pedestrian | 17 | 19 | 8 | 18 | 18 |
| Pedestrian@ Horizon | 0 | 1 | 2 | 0 | 0 |
| Bike Accidents | 17 | 24 | 23 | 28 | 26 |
| Bike @ Horizon | 0 | 1 | 1 | 0 | 1 |

Source: City of Grand Junction

Horizon Drive does not appear to be a particularly dangerous location for either riders or walkers. This, however, may also be a reflection of the small number of pedestrian and bicycles that utilize Horizon Drive. As suggested by city planning officials, because of the perception of danger, few pedestrians and bicyclists may venture onto Horizon Drive.

Airport Traffic

Because of its location to the airport, passenger counts provide an important indicator of the importance of Horizon Drive as a gateway to the community. Between 2005 and 2010, a dramatic increase in passenger enplanements at the airport is evident. Except for a small decrease in 2009, airport enplanements have consistently increased, rising by well over twenty-five percent in five years. Figure 1 shows passenger figures for 2005-2010.



Source: Grand Junction Regional Airport

Conclusions:

Data on traffic counts and safety provide evidence of the importance of Horizon Drive as the first impression of Grand Junction for many visitors. While accidents at the Horizon Drive-Interstate 70 interchange are small, the number of accidents is increasing. The Horizon Drive exit accounts for more than fifty percent of all Grand Junction highway interchange accidents.

Because of its proximity to the Grand Junction Regional Airport, as well as an Interstate-70 interchange, Horizon Drive truly is the “Gateway to Grand Junction”. Although Clifton may have more traffic exiting on to I-70B, much of the difference is caused by truck traffic. An attractive “gateway” is important in promoting the entire city to perspective businesses seeking to locate here. This also is important for non-location specific entrepreneurs or wealthy, active retirees looking for a high quality of life when seeking a place to relocate.

Economic Data

Retail Sales Tax Analysis

Businesses involved in retail sales constitute about one-third of the businesses in the Horizon Drive District. In 2010 these retail outlets accounted for three percent of the city's retail sales tax. On the other hand, hotels in the district accounted for 63% of the city's lodging tax. Table four shows the trends in city sales and lodging taxes for the past five years.

The largest percentage of lodging tax is collected from hotels in the Horizon Drive District. This is indicative of the significant contribution district businesses make to the county's tourism industry. According to the Grand Junction Visitor and Convention Bureau, the Horizon Drive District had 2,241 rooms with an average rental rate of \$81.95 in 2010. This represents over 70% of the lodging space available in Grand Junction

| Table 4: Sales Tax Collections by the City* | | | Lodging Tax Collections by the City | |
|---|------------------|-----------------------------------|-------------------------------------|-----------------------------------|
| | From all Vendors | From Vendors in Horizon Drive BID | From all Vendors | From Vendors in Horizon Drive BID |
| 2006 | \$ 40,913,475.00 | \$1,308,020.06 | \$1,147,556.00 | \$677,160.17 |
| 2007 | \$ 45,281,062.00 | \$1,508,339.61 | \$1,214,022.00 | \$ 804,143.65 |
| 2008 | \$ 47,281,733.00 | \$1,620,377.08 | \$1,497,797.00 | \$876,800.09 |
| 2009 | \$ 39,391,817.00 | \$1,298,657.35 | \$1,317,323.00 | \$673,600.19 |
| 2010 | \$ 38,794,165.00 | \$1,298,442.33 | \$1,065,929.58 | \$669,454.03 |

Source: City of Grand Junction

* Does not include use tax collections or sales tax collections by the County

The current city sales tax is 2.75%. The current lodging tax is 3.0%. Table five shows the total taxable retail sales and the total lodging sales for the Horizon Drive District. Total taxable retail sales combine both retail and lodging sales. Taxable retail sales in the Horizon Drive District come primarily from lodging, restaurants and convenience stores. The data in Table 4 and Table 5 can be used in the IMPLAN model to show the impact of retail activity in the Horizon Drive District on the greater Mesa County economy.

| Table 5: Retail and Lodging Taxable Sales for 2008 and 2010 | | | | | | |
|---|----------------------------------|------------------------|-----------------------------|-------------------------|----------------------------------|------------------------------|
| Year | Horizon Drive Total Retail Sales | % of City Retail Sales | Horizon Drive Lodging Sales | % of City Lodging Sales | Horizon Drive Other Retail Sales | % of City Other Retail Sales |
| 2010 | 47,216,073 | 3.3% | 22,315,133 | 63% | 24,900,939 | 1.8% |
| 2008 | 58,922,800 | 3.4% | 29,226,667 | 59% | 29,696,133 | 1.8% |

Source: City of Grand Junction

The sales data reported above are for sales that were subject to the city sales tax. Excluded from the data are any sales for which sales tax was not collected. Additional data on sales were obtained from the Colorado Department of Revenue (CDOR). CDOR identified seventy-two (72) businesses in the Horizon Drive District which have state sales tax licenses. Those seventy-two businesses report their annual gross sales to CDOR. These gross sales include both taxable and non-taxable sales. For any particular business this can be a more complete picture of sales than simply a report on taxable sales. The retail sales compiled by CDOR are defined as gross sales minus any wholesale sales. Since only seventy-two businesses are included, these sales figures are not a full representation of economic activity within the Horizon Drive Business District. Table 5a reports the retail sales results calculated by CDOR for the Horizon Drive Business District for 2010. CDOR has strict confidentiality

requirements and does not release any information that can identify individual businesses; however, Table 5 does also list the five largest industrial sectors identified in the Horizon Drive District by CDOR. It is possible that a larger industrial sector might be omitted from this list if information about that sector would reveal information about an individual firm within that sector. Table 5a also reports total retail sales in Mesa County and in the same five sectors as for the Horizon Drive District. The final column of the table calculates the retail sales in the Horizon Drive District as a percent of the corresponding Mesa County values.

Table 5a: Retail Sales: Dept. of Revenue Report 2010

| 2010 | Horizon Drive Retail Sales | Mesa County Retail Sales | Horizon Drive as Percent of Mesa County |
|---|----------------------------|--------------------------|---|
| Total | 101,289, 713 | 4,272,622,000 | 2.37 % |
| <u>Top 5 Industrial Sectors</u> | | | |
| Hotel and Other Accommodation Services | 34,886,325 | 59,547,000 | 58.59 % |
| Service Stations | 18,735,757 | 176,072,000 | 10.64 % |
| Food and Drinking Services | 16,073,909 | 202,285,000 | 7.95 % |
| Professional, Scientific, and Technical Services | 4,079,370 | 40,194,000 | 10.15% |
| Wholesale Trade | 1,956,131 | 376,287,000 | 0.52 % |

Source: Colorado Department of Revenue

IMPLAN Results

The IMPLAN model was developed by the Minnesota IMPLAN Group (MIG). The input-output analysis performed by IMPLAN, in essence, measures the cumulative impact from an initial dollar of spending that makes its way through the economy. Three types of impacts are measured. *Direct impacts* are income and employment directly related to spending in the Horizon Drive District, e.g., a tourist eats a meal in a restaurant. *Indirect impacts* occur when related industries gain from purchases by the directly impacted businesses, e.g., the restaurant buys supplies from local firms. *Induced impacts* are the results of spending by employees hired due to the business activity just described. Together, these will be reported as the total impact of retail sales in the Horizon Drive District on the Mesa County economy.

In the table below, the column labeled *output* can be thought of as the total change in output (or total spending) resulting from the initial sales. *Value added* can be thought of as the local income created by the initial sales. This number can be smaller than the sales number because some of the supplies purchased by local businesses may come from outside the local economy. Those dollars will be supporting those other economies not this one. *Value added* is in many ways the best measure of the local economic impact. *Labor income* represents the income earned by workers hired to carry out the

economic activity that created the sales. It is one part of the *value added* number. *Employment* represents the number of full time equivalent jobs supported by the sales.

This table reports the impact on the Mesa County Economy of the Horizon Drive District retail sales reported above.

Table 6: Impacts on Economy

| 2010 | | | | |
|--------------|------------|--------------|-------------------|--------------|
| Impact Type | Employment | Labor Income | Total Value Added | Output |
| Total Effect | 674.0 | 19,594,268.8 | 32,671,781.6 | 58,310,945.2 |
| 2008 | | | | |
| Impact Type | Employment | Labor Income | Total Value Added | Output |
| Total Effect | 868.2 | 25,621,656.8 | 42,793,422.9 | 77,449,882.6 |

Source: IMPLAN Model

Conclusions

Despite the fact that HDD retail sales is a small portion of Grand Junction's overall retail activity, it still creates almost \$60 million of economic output for Mesa County as a result of initial sales in the District. The significant contribution the Horizon Drive District makes to the area's vital tourism industry cannot be ignored. The results of the Listening to Business survey discussed later in this report demonstrate the importance of curb appeal to the promotion of the retail sector in the Horizon Drive District. As the data above demonstrates, the benefits of infrastructure improvements along Horizon Drive that result in increased retail sales will reverberate throughout the Mesa County economy.

Building Use

The Horizon Drive District contains a variety of different business types within its boundaries. An examination of building usage indicates that lodging and commercial office space in the District make up a considerable portion of Grand Junction's total building space allocated for these uses. In January 2011, more than seventy percent of the available lodging space in Grand Junction was located within the Horizon Drive District. The District also contained over twenty-five percent of Grand Junction's office space. (Table 7)

Table 7: Horizon Drive Building Use

| Building Use | Square Footage | Percent of City |
|---------------------|----------------|-----------------|
| Commercial Condo | 31,476 | 3.0% |
| Contracting Service | 11,764 | 0.6% |
| Lodging | 1,151,934 | 71.1% |
| Merchandising | 3,968 | <0.1% |
| Multi-Use | 134,510 | 7.0% |
| Offices | 563,108 | 25.8% |
| Recreation | 1,277 | 0.3% |
| Special Purpose | 128,692 | 1.6% |
| Warehouse Storage | 832 | <0.1% |

Source: Compiled from data provided by the City of Grand Junction

Note: The total office space vacant currently on Horizon Drive represents approximately 22% of the total office space available.

Of the office space located within the Horizon Drive District boundaries, over twenty-five percent was vacant in January 2011. This represents almost thirty-three percent of the vacant office space in all of Grand Junction (Table 8). The only area of the city with more vacant office space was the city center. In addition to the considerable amount of vacant office space in the Horizon Drive District, there is also a significant amount of vacant property available for development. According to the Mesa County Assessor's office, in June of 2011 there were thirty-four (34) vacant commercial lots totaling 991,987 square feet and nine (9) industrial vacant lots totaling another 978,793 square feet.

Table 8: Vacant Office Space by Grand Junction area

| Location | Vacant Office/Square Foot | Percent of Total |
|--------------|---------------------------|------------------|
| Appleton | 23,259 | 6.12% |
| City Center | 159,232 | 41.92% |
| Horizon | 124,923 | 32.88% |
| Northwest | 66,559 | 17.52% |
| Orchard Mesa | 1,500 | .39% |
| Redlands | 4,416 | 1.16% |
| TOTAL | 379,889 | |

Source: Compiled from data provided by City of Grand Junction

Conclusions

The Horizon Drive District provides the vast majority of lodging space (71.1%) found in Grand Junction. It also contains over twenty-five percent of the city's office space with almost one-third of the available vacant office space in the city. The Horizon Drive District has potential for adding businesses requiring easy access to I-70 or the airport. There is also a significant amount of vacant land available for commercial and industrial development.

Property Taxes and Values

Property taxes are an important component of the revenue base for many local governments. Both the City of Grand Junction and Mesa County rely on residential and commercial property taxes for part of their annual operating revenue. Table 9 shows that property taxes assessed on property within the Horizon Drive District have more than doubled from 2006 to 2010. Property taxes paid by HDD property owners represents over 7.5% of all commercial property taxes assessed by Grand Junction in 2010.

Table 9: Property Tax Revenues: Horizon Drive District and Grand Junction

| Year | Commercial/Industrial Property Taxes: Horizon Drive | Commercial/Industrial Property Taxes: City of Grand Junction | Horizon Drive Taxes as % of Total |
|------|---|--|-----------------------------------|
| 2006 | \$147,063.26 | \$1,898,750.32 | 7.75% |
| 2008 | \$247,273.36 | \$3,215,328.00 | 7.69% |
| 2010 | \$307,259.68 | \$4,086,823.28 | 7.52% |

Source: Mesa County Assessor's Office and Horizon Drive Business Improvement District

In Table 10 the property taxes paid to Mesa County have also increased from 2006 to 2010. This is an increase of over twenty percent in five years. The property taxes assessed for Mesa County from HDD property owners represents slightly more than five percent of the total assessed taxes for commercial property in Mesa County.

Table 10: Property Tax Revenues: Horizon Drive District and Mesa County

| Year | Commercial/Industrial Property Taxes: Horizon Drive | Commercial/Industrial Property Taxes: Mesa County | Horizon Drive Taxes as % of Total |
|------|---|---|-----------------------------------|
| 2006 | \$382,377 | \$8,185,879.00 | 4.67 % |
| 2008 | \$460,238 | \$9,369,998.26 | 4.91 % |
| 2010 | \$468,648 | \$9,224,327.51 | 5.08 % |

Source: Mesa County Assessor's Office and Horizon Drive Business Improvement District

The increase in property taxes paid by HDD property owners is directly related to the increase in actual and assessed property values of commercial property within the District boundaries. From 2006 to 2010 the actual value of the properties within the Horizon Drive District more almost doubled to almost \$133 million. This represents 7.5% of the total commercial property value for the entire city of Grand Junction.

Table 11: Actual and Assessed Commercial/ Industrial Property Values: Horizon Drive District and Grand Junction

| Year | Actual Value: Horizon Drive | Actual Value: City of Grand Junction | Horizon Drive Actual Value as % of Total | Assessed Value: Horizon | Assessed Value: City of Grand Junction | Horizon Drive Assessed Value as % of Total |
|------|-----------------------------|--------------------------------------|--|-------------------------|--|--|
| 2006 | \$69,429,750 | \$897,941,330 | 7.73% | \$20,134,620 | \$259,960,340 | 7.75 % |
| 2008 | \$106,583,475 | \$1,386,632,556 | 7.68% | \$30,909,170 | \$401,916,000 | 7.69% |
| 2010 | \$132,828,180 | \$1,762,729,420 | 7.54% | \$38,407,460 | 510,852,910 | 7.52% |

Source: Mesa County Assessor's Office and Horizon Drive Business Improvement District

Conclusions

Property values for commercial property in the Horizon Drive District have increased dramatically, almost doubling from 2006 to 2010. Consequently, property taxes assessed on Horizon Drive District commercial property owners have increased as well. As a percentage of the total assessed taxes on commercial properties for Grand Junction and Mesa County, the HDD contributes 7.52% and 5.08% respectively.

Employment and Wages

Information collected by state and federal governments on the numbers of employees and employee earnings is generally broken down no smaller than the county level. Therefore, data are not readily available for smaller subdivisions unless the employers themselves are willing to provide the information. Because that type of self-reporting is not available at this time for the Horizon Drive Business District, an effort was made to disaggregate county level data collected by the State of Colorado. As a first step, the Horizon Drive District compiled a list of private businesses, non-profit

organizations, and government agencies operating within its boundaries. That information, combined with a survey conducted by Mesa State College business students, identified 227 entities.

The Colorado Department of Labor and Employment (CDLE) maintains records on employers that contribute to the state's Unemployment Insurance Fund. CDLE provides data from those records for research purposes, subject to strict confidentiality requirements. The data collected were numbers of employees and wages paid those employees. The Horizon Drive District's list of potential employers was compared to CDLE's list of Mesa County contributors to the Unemployment Insurance Fund. During that process, an additional 21 Horizon Drive District employers were identified, but not all entities on the Horizon Drive District's list were found in CDLE's database. An extensive automated and manual search eventually identified 144 Horizon Drive District employers included in CDLE's data for 2010.

Table 12 describes the collective employee and wage data for those Horizon Drive District employers. Their numbers are then compared to all Mesa county employers participating in the Unemployment Insurance Fund. Those Horizon Drive District employers identified through the state's Unemployment Insurance Fund employed 2,614 full or part time employees in 2010. That represented 4.6% of all employees covered by unemployment insurance in Mesa County. Wages paid by the Horizon Drive District employers amounted to \$106,776,348, or 4.9% of all wages paid by the comparable Mesa County employers. It should be noted that these figures do not represent all Mesa County businesses nor do they include all Horizon Drive businesses. However, absent self-reporting by employers, they are the best data available to describe employment and wages in the Horizon Drive District and Mesa County.

Table 12: Employees and Wages (for Firms Paying into Unemployment Insurance Fund): Horizon Drive District and Mesa County

| Year | Employment: Horizon | Employment: Mesa Co. | Percent Horizon vs. Mesa Co. | Wages: Horizon | Wages: Mesa Co. | Percent Horizon vs. Mesa Co. |
|------|---------------------|----------------------|------------------------------|----------------|-----------------|------------------------------|
| 2010 | 2,614 | 57,337 | 4.6 % | \$106,776,348 | \$2,175,957,274 | 4.9 % |

Source: Colorado Department of Labor and Employment

Table 13 uses the same data to calculate an average annual wage for the Horizon Drive District businesses described above and compares it to an average annual wage calculated for all Mesa County employers paying into the Unemployment Insurance Fund. Again, these figures do not describe all businesses, and the employee numbers include both full- and part-time workers. The calculations do indicate that employees of the 144 Horizon Drive District employers identified earlier were earning, on average, higher wages than Mesa County employees overall.

Table 13: Average Annual Employee Wage (for Firms Paying into Unemployment Insurance Fund): Horizon Drive District and Mesa County

| Year | Total Wages: Horizon | Employment: Horizon | Average Annual Wage: Horizon | Total Wages: Mesa Co. | Employment: Mesa Co. | Average Annual Wage: Mesa Co. |
|------|----------------------|---------------------|------------------------------|-----------------------|----------------------|-------------------------------|
| 2010 | \$106,776,348 | 2,614 | \$40,856 | \$2,175,957,274 | 57,337 | \$37,950 |

Source: Colorado Department of Labor and Employment

An ideal report of the Horizon Drive District's economic contribution to the City of Grand Junction and Mesa County would include the value added to the regional economy by businesses and agencies located in the district. Value added could be calculated for the Horizon Drive District using the values of goods and services sold by businesses and the value of local spending by agencies that don't produce output for sale. Since that data is not available, a partial estimate of the value added by the Horizon Drive District to the regional economy was calculated.

This restricted value added calculation was performed using the data described above for 144 employers in the Horizon Drive District. The IMPLAN software, described earlier in the report, was used for the calculation. The 144 employers were assigned to 41 different industry sectors, e.g. extraction of oil and gas, insurance carriers, hotels and motels, etc. After the number of Horizon Drive District employees for each sector was entered, the IMPLAN software used data for the average productivity of workers in these sectors to estimate the output from the Horizon Drive District for each sector. From that estimate, the value added by those Horizon Drive District employers was calculated. Table 14 summarizes the results.

Table 14: Estimate of Employment, Labor Income, and Value Added Impacts from a Subgroup of Horizon Drive District

| Impact Type | Employment | Labor income (Employee Compensation+ Proprietor's Income) | Total Value Added |
|--------------|--------------|---|----------------------|
| Direct | 2,614 | \$131,101,909 | \$199,992,303 |
| Indirect | 552 | \$24,323,328 | \$39,086,551 |
| Induced | 903 | \$33,317,825 | \$61,531,792 |
| Total | 4,069 | \$188,743,082 | \$300,540,646 |

Source: Colorado Department of Labor and Employment, Horizon Drive District, and IMPLAN

The limits of this estimate should be emphasized. First, this estimate does not represent all businesses and agencies in the Horizon Drive District. In addition, it estimates the value of output (and, ultimately, value added) by using one piece of information, number of employees, rather than actual figures for output reported by businesses. However, it is the most reasonable estimate that can be calculated of the value added by the Horizon Drive District to the regional economy.

Conclusions

Employment and wage data from the Colorado Department of Labor and Employment was available for 144 of the 227 businesses operating in the Horizon Drive District in 2010. These businesses employed 2,614 employees or almost five percent of the total Mesa County workforce. The wages paid to those employees also account for almost five percent of the total wages paid to employees in the county. The average wage of HDD employees in 2010 was \$40,856 which is over \$2,900 higher than the average wage in Mesa County. According to an analysis of employment data available on 144 businesses in the District, these businesses add over \$300 million in direct, indirect, and induced economic benefits to the Mesa County economy. These benefits are calculated from employment data alone and do not consider business income or other spending by those businesses in the local economy that would also increase the economic benefits to the Mesa County economy.

LISTENING TO BUSINESS – Horizon Drive District 2011

Background

The Listening to Business Program (L2B) began in 2004 interviewing businesses in Mesa County, Colorado with the goal of accessing the needs of local business and gaining insight from the perspective of business owners. Knowing the needs and barriers to growth of business helps economic development agencies develop more effective programs. Since at least 80 percent of job growth comes from local business, this could increase the viability of the local economy. The program also attempts to identify the opportunities and risks existing within the local economy

Since 2004, the Listening to Business program has interviewed almost 350 businesses. The first set of 100 interviews completed in 2005 (L2B1) focused on businesses in the manufacturing, transportation, healthcare, value-added agriculture, and energy sectors. In the second set of interviews completed in 2007 (L2B2), the program expanded to include high-end business services and the construction industry in addition to energy and manufacturing businesses. Both L2B1 and L2B2 interviews included only companies in the primary sector of the economy that receive the majority of their revenue from outside of Mesa County. These primary employers, in turn, hire from the local workforce and buy supplies and services locally, thereby fueling the growth of the local economy. Since this sector represents “new dollars” into the county, growth in this area could exponentially improve the local economy. In 2009 (L2B3) the program expanded to include Convention, Retail, Tourism, and Service industries.

In 2011 the Horizon Drive District contracted with Mesa State College to assess the impact of the Business District on the Mesa County Economy. The L2B program was utilized along with other data collection in an effort to determine projected growth of the district’s businesses, their concerns about possible barriers to growth and their perception of community support for the district. Because of the proprietary nature of much of the data it will be difficult to project future economic activity in the district.

Methodology

The L2B program uses the e-Synchronist software program as a tool to gather, analyze, and report company data. This software provides a questionnaire giving a consistent collection format and the ability to compare the data collected. This software is being used by business retention and expansion programs throughout Colorado and nationwide providing relative comparisons and perspective to some of the data gathered. In March 2011, 249 surveys were hand delivered to the businesses in the Horizon Drive district. Two attempts were made to pick up the surveys and all businesses were called before the second attempt. Thirty-five surveys were completed and returned by business owners. In addition to these delivered surveys 25 businesses were contacted to be interviewed on-site. Interviews were completed with 15 businesses. The interview process also provides a networking and learning opportunity for the business leaders that participate in the interviews. Each interview is conducted by the program coordinator accompanied by board members and staff from the Horizon Drive District. The board members can then offer an expanded perspective when advising their organization.

From January 2011 to April 2011, survey data was received by 50 companies. In addition a shortened survey was mailed to all property owners of which 16 were returned.

Throughout this report you will see references to Primary Companies and CRTS: **Primary** refers to Manufacturing, Energy and some Construction businesses that sell primarily outside of Mesa County; **CRTS** refers to secondary businesses in the Convention, Retail, Tourism, and Services industries. The e-Synchronist software has different survey instruments for these two sectors. The information is discussed as it pertains to each sector unless the data can be combined.

Perception vs. Reality

The Listening to Business program is a subjective study measuring the perceptions of local business. The program does not try to determine if the statements made by the businesses are factually accurate. It is important to remember the importance of perception when making public policy. Perceptions form the basis for investment decisions made by businesses. Concerns mentioned by a business are legitimate and can be approached in two ways by policy makers. If the perception is in fact a problem, the potential to improve the quality of the business environment exists. If the perception is a misunderstanding by the business, the potential exists for an educational opportunity. Either way the community wins.

WHO WE CONTACTED

Industry Sectors

The Horizon Drive District houses approximately 249 businesses of which 82 percent are service business and eighteen percent are retail businesses. In this instance all businesses that do not collect sales tax are considered service businesses. The chart below shows the breakdown in types of businesses and the percent of these that were surveyed.

| Type of Business | | % of Total Businesses | SURVEYS |
|-------------------------|------------|-----------------------|---------|
| Service Business | 183 | 82% | 66% |
| Retail Business | 41 | 18% | 34% |
| Total Businesses | 224 | 100% | |

COMPLETED

SURVEYS

50

22%

| Type | Number | % of Total Businesses | % of Survey |
|--------------|------------|-----------------------|-------------|
| Non-profit | 8 | 3% | 0% |
| Government | 19 | 8% | 9% |
| Energy | 25 | 12% | 11% |
| Medical | 24 | 11% | 13% |
| Legal | 11 | 5% | 4% |
| Financial | 10 | 4% | 13% |
| Other | 63 | 31% | 7% |
| Insurance | 13 | 6% | 4% |
| Construction | 4 | 2% | 2% |
| Real Estate | 3 | 1% | 5% |
| Total | 183 | 82% | 66% |

| Type | Number | % of Total Businesses | % of Survey |
|--------------------|-----------|-----------------------|-------------|
| Lodging | 15 | 7% | 14% |
| Restaurants | 13 | 6% | 7% |
| Convenience stores | 3 | 1% | 7% |
| Other | 3 | 4% | 5% |
| Total | 41 | 18% | 100% |

Size of Businesses

The majority of the companies interviewed employ 100 employees or less, thus this survey sample reflects the employment base in Mesa County. The majority of the businesses are privately owned (90 percent) and headquartered in Mesa County. The survey sample included 9% government offices.

Nineteen percent of respondents providing payroll figures have annual payrolls over one million dollars.

Of the 249 surveys delivered, 20% were returned. An additional 6% were interviewed in person. Overall 26 percent of the businesses within the Horizon Drive District were surveyed. The sample provides a representative cross section of business in the area and identifies trends and attitudes of those businesses.

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.

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 product innovation each company is doing. This analysis provides a background on company activity in the past five years and how they are positioned to capitalize on upcoming opportunities and changes.

Achievements

Thirty-three percent of the companies interviewed saw growth as their greatest achievement in the past five years (compared to 37, 47 and 50 percent in L2B1, L2B2 and L2B3 respectively). This growth was attributed to specific decisions regarding deliberate strategy as well as shifts in the economy itself--those surviving getting bigger market shares. These achievements were described in terms of expanding service area, increasing service options, and increase in clients/customers which could be attributed to increased market share. Another thirty percent of those asked specifically mentioned that the decisions were made in response to a business challenge attributed to their survival, citing 2009 as "the worst year ever".

Awards and recognitions are described in terms of corporate-wide top ranking for local branch affiliates. Good safety records were viewed as an achievement for energy and construction firms. Awards and recognition was a source of achievement mentioned by 12 percent of those interviewed.

Life Cycle – Primary

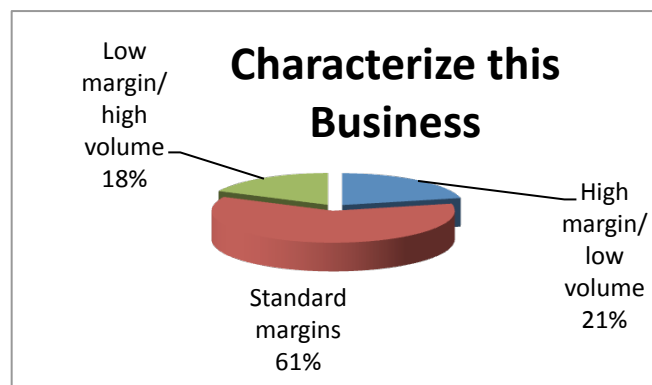
Fifty percent of the primary companies interviewed classified their primary products in the growth stages of the product life cycle. This indicates that this group of participants feels that there is good growth potential for their products.

Fifty percent of the interviewed companies' products are in the mature stage of the life cycle. Most of these companies are in the construction and energy sectors in which there is increasing consolidation and intense rivalry among key players in each market segment. Most of the companies interviewed invest less than 3 percent of sales in research and development. Most describe their research and development as being part of their ongoing business operations, not necessarily a distinct separate business function; or that their innovation research is being done by vendors from whom they buy products; therefore, this low percentage may be misleading. Though the companies do not maintain a research and development cost center, they do continue to be innovators. Eighty-three percent have introduced new products in the past five years, and 50 percent will introduce new products in the next two years.

Product Innovation- Convention, Retail, Service, Tourism (CRTS)

In the secondary sector, 42% percent of companies interviewed have introduced new products or services in the last five years. Participants interviewed do not expect to continue this level of market adaptation with only 11 percent expecting to introduce new products within the next two years. (Compared to 54 percent in L2B3).

Most of these secondary employers characterize their business as having standard margins for their industry-61 percent. Twenty-one percent sell a low volume of higher products and 18 percent have a volume-based business model making money by selling a large number of low priced items. This indicates a healthy mix of generic strategies.



The first section of this study shows that the companies interviewed were in growing markets where growth was attributed to *strategic decisions* made by these companies. These strategies included adding locations and services which led to increased *market share in a contracting economy*. The introduction of new products for over 83 percent of primary companies and 42 percent of CRTS companies further contributed to increased growth. It is important to note that the anticipated rate of innovation and new product introduction reduced dramatically with only 11 % of CRTS companies expecting new products in the next two years.

The first section of this study shows that the companies interviewed were in growing markets where growth was attributed to strategic decisions made by these companies. These strategies included adding locations and services which led to increased market share in a contracting economy. The introduction of new products for over 83 percent of primary companies and 42 percent of CRTS companies further contributed to increased growth. It is important to note that the anticipated rate of innovation and new product introduction reduced dramatically with only 11 % of CRTS companies expecting new products in the next two years.

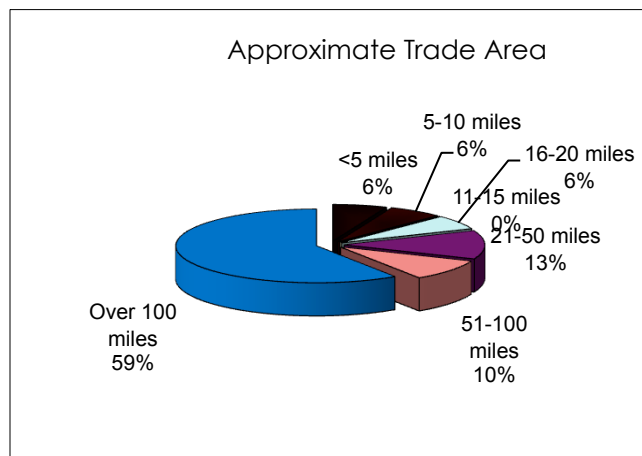
MARKETS

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.

Customer Base- Primary

Sixty-seven percent of the companies interviewed view their primary market as being regional (Rocky Mountain states) National markets make up the primary market for 17 percent of the companies. None of the companies interviewed serve international markets. Of the primary companies interviewed export markets do not factor into their business.

Customer Base-Retail, Tourism, and Service



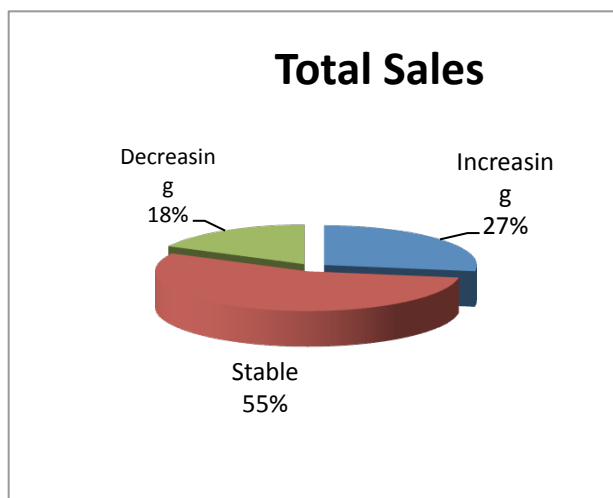
Though not considered primary sector, the retail, tourism, and service businesses interviewed draw a substantial proportion of their business from outside Mesa County. Fifty-nine percent identify their trade area as greater than 100 miles with an additional 10 percent saying their market is within 51 to 100 miles.

The CRTS businesses have consistent and loyal clientele with 50 percent of customers visiting these businesses weekly (20 percent) or daily (25 percent).

Sales growth and Market share- Primary

The economic slowdown was reflected in the report of sales trends by the primary companies. While 50 percent of companies reported increased sales, this growth trend is down significantly from the 2009—L2B3 to 56% increasing sales and 93 percent report increasing sales in 2007-L2B2 and 81 percent in 2005-L2B1 . Thirty percent report having stable sales, which is positive considering the economic slowdown the country is experiencing Seventeen percent were experiencing declining sales. Fifty percent of those primary companies interviewed had very competitive strategies increasing market share, again this data is consistent with the previous section showing those companies surviving are increasing their market share.

Sales growth and Market share - Retail, Tourism, and Service



The economic slowdown has had an impact on those business interviewed with only 27% seeing increasing sales compared with 71% in 2009-L2B3. Fifty-five percent still have stable sales, which is positive in the current economic environment. Eighteen percent of the CRTS companies interviewed were experiencing declining sales. For comparison purposes, with companies interviewed in L2B3 after January 2009, 25 percent were seeing decreasing sales. Some (20 percent) of this increase in sales

volume was fueled by the increase of the price of individual sales.

The target market demographics identified the retail, tourism, and service businesses interviewed was dominated by 45-54 year olds in the \$50,000 to \$100,000 income range. The target age demographic has shifted to an older target since the previous studies; the target income range has not shifted.

Projected Investment -Prime

Fewer primary companies reported that they were planning to expand within the next three years – 67 percent compared to 71 percent in 2009-L2B3, to 84 percent of the interviewed companies in 2007-L2B2 and 75 percent of companies in the L2B1 study. Only 17 percent of those affected reported that they had room to expand at their current location. This could be a leading indicator for companies planning to change locations.

Projected Investment - Retail, Tourism, and Service

Twenty-eight percent of the CRTS companies interviewed were planning to expand or renovate within the next three years and 10 percent were planning a new location in the next three years. It is interesting to note the significant lower plans for expansion when comparing this sample to those interviewed after January 1, 2009 in L2B3 where, 75 percent of companies said they plan to expand or renovate in the next three years.

The investment and employment effects are summarized below:

| | 2011-Prime (HDD) | 2011-CRTS HDD | 2011-HDD-Total |
|---------------------------------------|------------------|---------------|----------------|
| Number of business interviewed | 6 | 40 | 46 |
| Estimated \$ Investment | \$ 1,100,000 | \$ 5,570,000 | \$ 6,670,000 |
| Estimated New Jobs | 14 | 11 | 26 |
| Estimated New Space-sq. ft. | 0 | 3000 | 3000 |

In a time of extreme economic slowdown, 50 percent of primary companies and 27 percent of CRTS companies still reported increasing sales. While price increases helped with the increase in revenue, sales increases were also attributed to growth in market share gained with a consolidating marketplace. Sales growth has led to over (adjusted*)

- \$6,670,000 in projected capital investment,
- 26 new jobs, and
- 3000 square feet of new commercial space needed over the next three years.

The investment is mostly projected for office space renovation and technology upgrades, with little square footage expansion and few jobs added (only 2 percent of current workforce for CRTS companies).

INDUSTRY-Prime

The third section of the LTB –Prime 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.

Concentration - Prime

Thirty-three percent of the primary employers interviewed thought that merger, acquisition, and divestiture activity were increasing in their industry indicating industries that are becoming more consolidated. In L2B3 this was 75 percent, in L2B2 this was significantly lower at 51 percent; yet in L2B1, 97 percent of companies viewed consolidation pressures as being strong. Again, the magnitude of this number is influenced by the number of companies interviewed and industry sectors. These results indicate the consolidation pressure in the industries represented. Increasing consolidation pressure could provide an opportunity for local companies to sell to larger entities trying to gain market share. From a community perspective this is both a risk and an opportunity. New owners bring new resources, but also the potential to consolidate their holding and move local operations to a different community.

Industry capacity has shifted significantly in the last two years. None of those interviewed say that production in their industry is under capacity compared to 51 percent in 2007-L2B2. Thirty-eight percent believed production in their industry was under capacity in the 2005-L2B1 driving significant investment in production capacity to fill market demand. This reflects not only the significant investment in industry capacity of the past four years, but also the downturn in the global economic demand. Of those responding, 33 percent viewed their industries as having too many companies competing for market share.

Legislative and Regulatory Concerns.

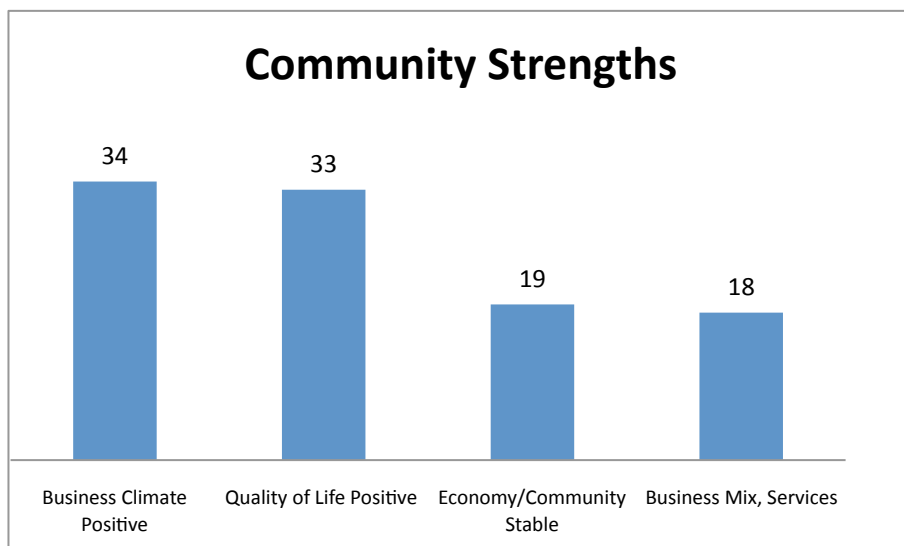
Previous L2B studies demonstrated that around 50 percent of those interviewed expressed concerns about increased federal, state, and local legislation. The 2008-09 L2B3 study conducted in an election year saw a significant shift in the perceived potential for negative legislation and regulation with 68% of primary employers and 72% of CRTS businesses anticipating legislation that would negatively impact them. Though not quite as high as the election year numbers, currently 75 percent of primary employers and 66 percent of CRTS anticipate legislation that could harm their business. Positive results from legislation are anticipated by 50% of Prime and 13% of CRTS employers.

The legislative issues specifically mentioned included:

- Increased regulation and the costs associated with these regulations).
- Changes in independent contractors' status.
- Healthcare reform and the unknown associated costs.
- Increased taxes
- Reduced government spending (7 percent of interview sample were government agencies) would lead to fewer government employees and less government spending in local hotels, restaurants and service businesses.

Less than 50 percent of those interviewed in either economic sector expected legislation or regulation that would benefit their companies. Many business expressed hope that oil and gas regulations would be adjusted, possible benefits from health care reform, and government agencies that would benefit from more funding for BLM/community partnerships.

In previous studies, the ability of government entities to impact businesses was not viewed as a major concern for most companies, this changed in L2B3 when asked about negative effects of regulation. Previously companies were aware of the potential legislative impacts and expected that they would deal with them as they occurred. Since 2009 businesses have been concerned about the regulatory environment and what impact it would have on their business. Specific concerns continue over regulation, healthcare reform, and taxes.



MANAGEMENT - Primary & RTS

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.

The ownership and top management of the primary sector companies has been fairly stable over the past eighteen months and is expected to remain stable. Top management of the interviewed companies has changed or is expected to change in 17 percent of companies (compared to 27 percent in L2B3). Ownership has changed in 17 percent of primary companies and 2.5% of CRTS companies. Most of the change has been in the adjustment of partnerships or in companies that have changed ownership.

Employment

The economic slowdown was reflected when looking at the longitudinal data collected over the past five years. In the 2005-L2B1 study employment was considered strong with 67 percent projecting an increasing need for employees. The increasing employment needs jumped to 90 percent of the companies interviewed in the 2007- L2B2 study. This number slowed considerably in the 2009-L2B3 study to only 42 percent of primary employers and 56 percent of retail, service, and tourism (CRTS) employers seeing a need for more employees. Currently, twenty-three percent of CRTS and fifty percent of Prime employers see a need to expand their workforce. In contrast seventeen percent of Prime companies are decreasing their workforce while 8 percent of CRTS are reducing their workforce. Only three percent of CRTS employers have unfilled positions in primary technology-based jobs.

Perceived Community Strengths and Weaknesses

Location was viewed as a community strength for thirty percent of the companies interviewed for this study. Specific attributes included ease of access to public lands, proximity to interstate and convenient access to suppliers and customers. Twenty percent of all companies interviewed mentioned quality of

life as a strength of the community. Though consistently one of the most mentioned attributes, the number of businesses perceiving quality of life as a community strength has dropped significantly. In 2007-L2B2 48 percent and in 2005-L2B1 46 percent of respondents said that the community's primary strength was the quality of life. This does not necessarily mean a deterioration of quality of life, but that the businesses interviewed were more focused on business climate issues.

Twenty percent of the companies in the current survey feel that Mesa County has a positive business climate—34 mention this in L2B3 and 36 percent in L2B2. A positive business climate includes a healthy, diverse growing economy, networking opportunities, a supportive community, and abundance of natural resources in the area. These strengths are echoed in the third and fourth most mentioned community strengths – a stable economy and a healthy mix of business services—for example a supportive chamber of commerce, networking opportunities were specifically mentioned.

No community weakness was mentioned by more than ten percent of those surveyed. Weaknesses mentioned include:

- Inadequate markets and business services
- Limited skilled workforce (technology based skills)
- Community leadership (lack of new library, safety center, recreation center)

Previous issues with planning department and other government services were not mentioned by this sample.

In order to determine the severity of these community weaknesses, companies were asked to identify what they perceived to be actual barriers to growth.

Perceived Barriers to Growth

Three issues that had the potential to impede growth were mentioned by businesses by businesses:

- Overall economic conditions.
- Poor work ethic
- Increased regulation of the energy industry.

Ownership and top management of local business is expected to remain stable over the next year. Less than 10% of companies have changed ownership and top management has changed for less than 17 percent of the companies interviewed. The need for employees and the number of vacant positions changed dramatically when compared to previous studies. In the 2007- L2B2 employment needs were increasing for 90 percent of the companies interviewed. This number slowed considerably in the 2009-L2B3 study to only 42 percent of primary employers and 56 percent of retail, service, and tourism (RTS) employers seeing a need for more employees. Currently, the Horizon Drive District employment needs are increasing only 23 percent for CRTS employers and 50 percent for Prime employers.

The strengths of this community as a place to do business have remained consistent over the past three studies: *quality of life, strength of the local business environment—including a diverse mix of businesses, and loyal customer base, and geographic location.* No major trend was identified for community weaknesses.

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 compared to the previous data collected in L2B1 and L2B2.

| 1-low, 7-high | L2B1- 2005 | L2B2- 2007 | L2B3- 2009 Prime | L2B3- 2009 RTS | HDD- 2011 |
|---------------|---------------|---------------|------------------------|----------------------|--------------|
| AVAILABILITY | 4.9 | 2.83 | 3.5 | 3.5 | 5.08 |
| QUALITY | 4.03 | 3.41 | 4 | 3.6 | 4.28 |
| STABILITY | 5.01 | 4.09 | 3.7 | 3.7 | 4.49 |
| PRODUCTIVITY | 6.1 | 5.78 | 5.2 | 5.2 | 5.43 |

All aspects of workforce evaluations have increased over the past two years. There are more quality employees available for the employers to choose from. With fewer jobs available, people tend to stay as productive employee once hired.

Training and Skill Gaps

Most of the companies we spoke with will provide training for their employees. Training budgets are increasing for 25 percent of Primary and 22 percent of CRTS companies. In L2B2 63 percent of companies stated that their training budget is increasing. Seventy-five percent of Primary employers and 71 percent of CRTS companies felt their training budgets were stable. Seven percent of CRTS companies anticipated a decline in their training budgets. There was no trend that emerged for common recruitment problems in this current study.

COMMUNITY SERVICES

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

When asked if they had suppliers or customers which would benefit from being located in Mesa County, none of the primary companies interviewed felt they were lacking any services or suppliers. The Retail, Tourism, and Service sectors discussed having trouble finding *qualified IT professionals*. In terms of services that their customers requested that weren't being provided for the company, responses included: *Trader Joes, "green" space or parks in the area, and more variety in restaurants and entertainment.*

A table showing the rating of public services on a scale of one to seven (seven being highest) follows. The table also shows trends in local data and compares the current data with data collected during 2008 on a state and national level.

| Community Services 1-Low, 7-High | L2B1- 2005 | L2B2- 2007 | L2B3- 2009 | HDD- 2011 | Colorado 2008 | National 2008 | Difference Local/Nat. | Difference- Local/State |
|-------------------------------------|---------------|---------------|---------------|--------------|------------------|------------------|--------------------------|----------------------------|
| | | | | | | | | |
| Police protection | 5.63 | 5.56 | 5.62 | 5.24 | 5.44 | 5.65 | -0.41 | -0.2 |
| Fire protection | 6.12 | 5.95 | 5.88 | 5.81 | 5.87 | 5.97 | -0.16 | -0.06 |
| Ambulance paramedic | 5.98 | 5.55 | 5.02 | 5.78 | 5.67 | 5.9 | -0.12 | 0.11 |
| Health Care | not rated | 5.77 | 5.46 | 5.72 | 5.09 | 5.59 | 0.13 | 0.63 |
| Child Care | not rated | 4.33 | 3.59 | 4.14 | 4.33 | 4.95 | -0.81 | -0.19 |
| Schools (K-12) | 5.32 | 5.34 | 4.97 | 4.65 | 4.97 | 5.31 | -0.66 | -0.32 |
| Community College (WCCC/UTEC) | not rated | 5.35 | 6.83 | 5.43 | 5.36 | 5.5 | -0.07 | 0.07 |
| Mesa State | not rated | 5.59 | 5.84 | 5.57 | 5.4 | 5.62 | -0.05 | 0.17 |
| Public Transportation | 4.77 | 4.28 | 4.28 | 4.69 | 4.42 | 4.07 | 0.62 | 0.27 |
| Traffic Control | 4.37 | 4.44 | 4.44 | 4.59 | 4.4 | 4.59 | 0 | 0.19 |
| Streets & Roads (local) | not rated | 4.69 | 4.69 | 4.21 | 4.38 | 4.54 | -0.33 | -0.17 |
| Highways | not rated | 5.11 | 5.11 | 4.74 | 4.68 | 5 | -0.26 | 0.06 |
| Airline Passenger Service | not rated | 3.29 | 4.1 | 4.92 | 4.41 | 4.65 | 0.27 | 0.51 |
| Property Tax assessment | 3.85 | 4.44 | 4.08 | 3.84 | 4.66 | 4.3 | -0.46 | -0.82 |
| Zoning Changes & Bldg. permits | not rated | 5.02 | 4.1 | 4.15 | 4.51 | 4.54 | -0.39 | -0.36 |
| Community Planning | 3.72 | 3.57 | 4.51 | 3.91 | 5.11 | 4.79 | -0.88 | -1.2 |
| Regulatory enforcement | 4.73 | 4.8 | 5.18 | 4.12 | 4.86 | 4.83 | -0.71 | -0.74 |
| Chamber of Commerce | not rated | 5.61 | 5.19 | 4.54 | 5.08 | 5.43 | -0.89 | -0.54 |
| GJ Economic Partnership | not rated | 4.21 | 4.08 | 4.1 | 5.11 | 5.7 | -1.6 | -1.01 |
| Business Incubator Center | not rated | 5.84 | 5.97 | Na | not rated | not rated | | |

| | | | | | | | | |
|-------------------------------|-----------|-----------|------|------|-----------|-----------|--|--|
| Visitor and Convention Bureau | not rated | not rated | 6.04 | 5.58 | not rated | not rated | | |
|-------------------------------|-----------|-----------|------|------|-----------|-----------|--|--|

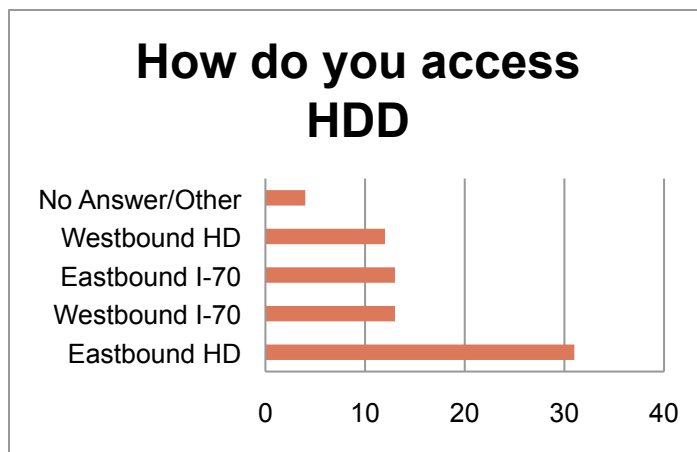
The only item rated below the 4.0 average was:

- Community Planning and Property Tax Assessment.

Community Planning refers to the overall vision for the community carried out by local government, not zoning and the planning department which is evaluated separately.

Data from previous studies is presented for comparison purposes. These numbers are also compared to responses from 2009 interviews in Colorado and nationally.

The only community service rated at least 1 point below other surveys is the Grand Junction Economic Partnership. Property tax assessment rated 1 point below Colorado survey data.



Though several businesses commented on the inconvenience caused by power outages in the Horizon Drive area, no utility was rated significantly low.

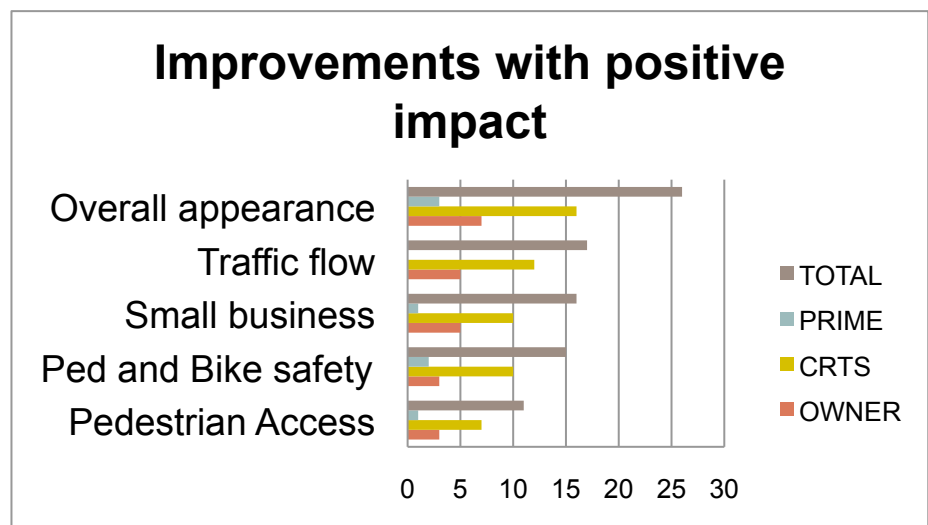
HORIZON DRIVE SPECIFIC DATA

The majority of business owners (36 percent) access the Horizon Drive District coming from Grand Junction traveling east onto Horizon Drive. About 40

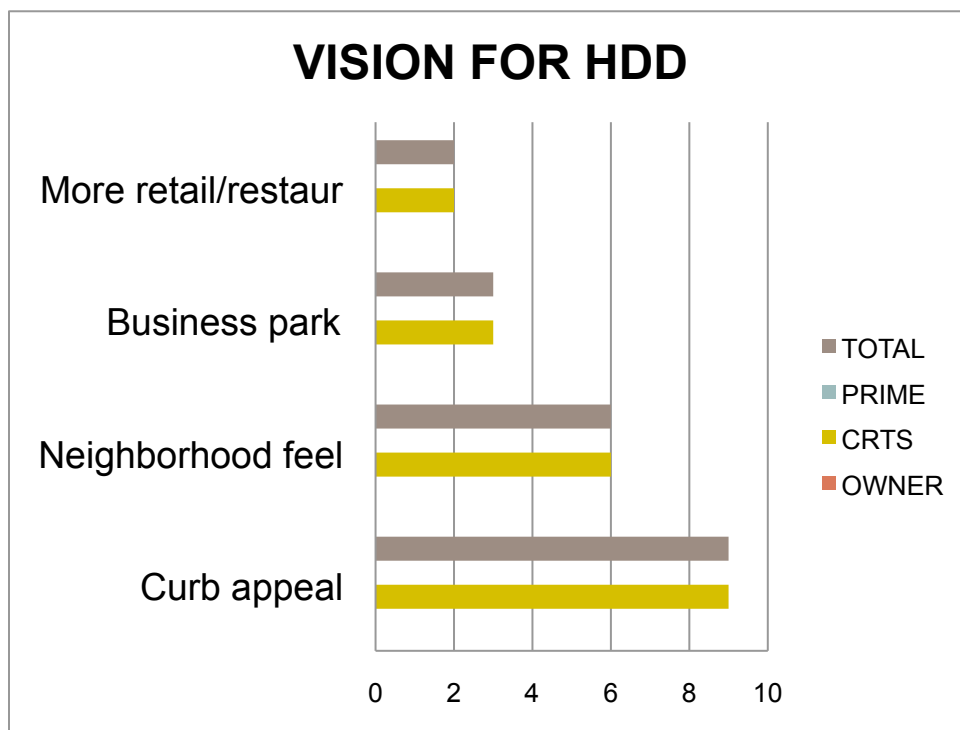
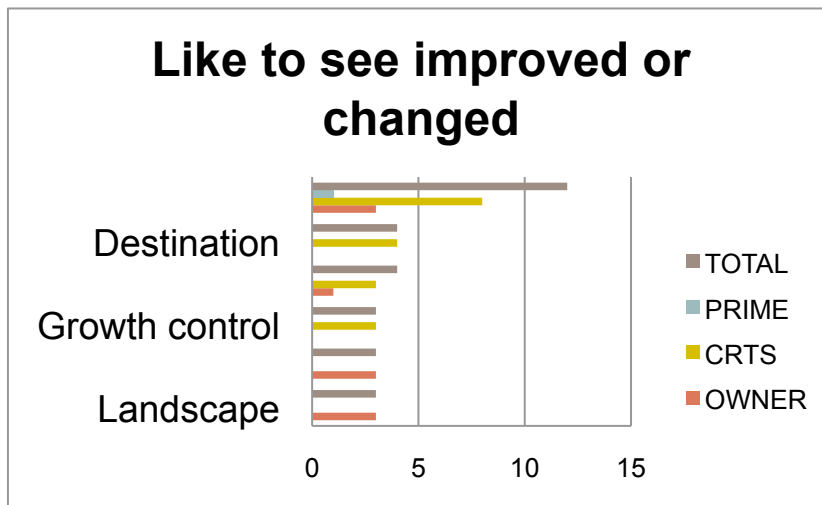
percent enter the area off of I-70 about equally from east and west.

The majority of those surveyed felt that improving the overall appearance of the Horizon Drive District will have the greatest positive economic impact. Improved traffic flow was viewed by property owners and retail/ service business as a potential positive and

pedestrian and bicycle safety were other items that could have positive impact. These two groups also were interested in seeing more small business activity in the area. All three groups polled (owners,



retail/service, and primary employers) thought improvements in pedestrian and bicycle safety would positively impact the area. The importance of the overall appearance of the District was emphasized again when all three constituent groups surveyed viewed curb appeal as the item they would most like to see improved.



All participants were asked about what their vision for the future of the Horizon Drive District. Only participants in the Retail/Service industries chose to provide input on this question. This group's vision for the future of the area included better curb appeal which would instill a neighborhood feel in the form of a business park with more retail and restaurants.

When asked to rate community services provided in the district the lowest rated items had to do with services available in the area –shopping and recreation. Pedestrian and bicycle safety was also rated low. The advertising of the Horizon Drive District as a whole was rated low, though businesses interviewed did not necessarily feel that this was something the District should do.

| Rating of HDD area on 1 to 7 scale | |
|--------------------------------------|------|
| Shopping Availability | 3.47 |
| Advertising of HDD businesses | 3.74 |
| Recreation Availability | 3.8 |
| Pedestrian/Bicycle Safety | 3.98 |
| Signage Appearance | 4.29 |
| Traffic Flow | 4.29 |
| Street Sweeping/Snow Removal | 4.29 |
| Building/Landscaping appeal | 4.43 |
| Street Conditions | 4.86 |
| Public Transit Availability | 4.94 |
| Personal Safety | 4.98 |

Conclusions

The 2011 Horizon Drive District Listening to Business report shows a healthy, but guarded business climate. Most businesses are stable with a few growing slightly. Those interviewed were concerned over the legislative and regulatory impact on the business environment. This concern translated into hesitancy in investment and hiring. The primary sector businesses are competing mostly for a regional market. This survey shows that traditionally local-based market businesses in the retail and service sectors also serve a regional market with at least 50 percent of their customers coming from a 50 to 100+ mile range.

Companies were pleased with the local business environment and quality of life offered by the community. They viewed locating their business in Grand Junction to be a strength. Businesses did not find the community to have any major weaknesses or actual barriers to growth.

The businesses that are continuing to grow have attributed their success to survival and the ability to gain market share. The HDD businesses service a regional market bringing new dollars into the Mesa County economy. These businesses can be supported by increasing their ability to access the regional market.

Businesses will need to be confident in the stability of the local economy before they will invest capital in their businesses. A major factor in this confidence is the ability to predict the impact of the regulatory and tax environment. Businesses expressed their concern about the state and federal regulatory environment in this study. Economic Development agencies can help businesses with this issue by being an advocate for businesses on a state and national level, especially on issues that have local impact. This will help build the confidence in the predictability and stability of the local economy and promote investment.

Items that impact HDD businesses that can be influenced by the Horizon Drive District Include:

- Curb Appeal
- Traffic Flow
- Pedestrian and bicycle safety

Assistance in these areas by the City of Grand Junction, Mesa County and the State of Colorado will promote the area's economy by increasing the Horizon Drive District's contribution to growing the area's tourism industry, promoting the area as an attractive location to relocate new businesses and encouraging active retirees to relocate to the area.

Summary of Results

The data collected on the Horizon Drive District indicates the important contribution it makes to the local economy. The significant numbers of people who enter the city via the airport or the I-70 – Horizon Drive interchange are a clear indication of the vital role Horizon Drive plays as a gateway to Grand Junction. Traffic accident data suggests that travel through the district is relatively safe, but there are signs that safety may become an issue in the future.

An IMPLAN modeling of retail activity in the Horizon Drive District shows that the District's retail activity contributes almost sixty million dollars of additional economic output to the local economy. While taxable retail sales in the District are less than two percent of Grand Junction's total retail sales, much of this economic activity is generated from customers living outside of Mesa County.

The examination of building usage indicates the important contribution the District makes to tourism in the region. Over seventy percent of the lodging space in Grand Junction is located in the Horizon Drive District. With over 2,200 rooms available at an average rate of \$81.95 in 2010, the District generates 63% of the city's lodging tax.

The Horizon Drive District also is an important source for office space in Grand Junction. In January 2011, the District contained over one-fourth of the office space in the City of Grand Junction. Roughly one-third of the vacant office space in Grand Junction is located within the Horizon Drive District. The District also contains a significant amount of vacant land designated for commercial or

industrial development. These lands are ideally suited for businesses seeking close proximity to I-70 and/or the airport.

Horizon Drive District commercial property values and property taxes increased dramatically from 2006 to 2010. The Horizon Drive District makes up over 7.5% of Grand Junction's total commercial property taxes and over 5% of Mesa County's total. From 2006 to 2010 commercial property values in the District almost doubled to nearly \$133 million.

The Horizon Drive District is comprised of about 227 businesses. Employment and wage data available on 144 of these businesses reveals that the District employs 2,614 full or part time employees with a total payroll of almost \$107 million dollars. This is almost five percent of the total Mesa County workforce and payroll. The average employee in these HDD businesses makes \$2,900 per year more than the average employee in the county. Employment in these 144 businesses contributes over \$300 million in economic value to Mesa County.

The Listening to Business survey indicates that businesses in the Horizon Drive District are similar to businesses throughout the country in that the recession of 2008 has taken its toll on their revenue. However, many businesses continue to grow. Primary businesses in the District compete mostly in the regional market. Retail and service businesses also report that they serve a regional market with roughly half of their customers traveling from fifty to one hundred miles.

Businesses participating in the Listening to Business survey expressed the belief that improved curb appeal, better traffic flow and improved pedestrian and bicycle safety are the three things that the District, with the help of the city and county, could do to improve the District's business climate.

Appendix I. List of Horizon Drive District Businesses; Compiled Primarily by Horizon Drive District;
 Supplemented by Telephone Listings, Google Maps, and Limited Survey by Colorado Mesa
 University Students; Updated to Reflect Businesses and Agencies in Operation 2011.
 Total Accuracy Cannot Be Guaranteed.

| NAME | ADDRESS |
|---------------------------------------|-------------------------|
| A1 COLLECTIONS | 715 HORIZON DR #401 |
| ABC WESTERN COLORADO | 2754 COMPASS DR #305 |
| AERIAL | 759 HORIZON DR #M |
| AFFORDABLE INN | 721 HORIZON DR |
| AGAPITO & ASSOCIATES | 715 HORIZON DR #340 |
| AK'S HAIR STUDIO | 743 HORIZON COURT #105A |
| ALEXANDER INSTALLATIONS LLC | 744 HORIZON CT #135 |
| ALL PHASE ELECTRIC SUPPLY | 2776 CROSSROADS BLV |
| ALPHA FINANCIAL | 715 HORIZON DR #300 |
| ALPINE BANK GJ | 709 HORIZON DR |
| ALPINE HOME HEALTH & HOSPICE | 2764 COMPASS DR #110 |
| AMERICAN CANCER SOCIETY | 2754 COMPASS DR #100 |
| AMERICAN FAMILY INSURANCE - LEE ALLEE | 759 HORIZON DR #J |
| AMERICA'S BEST VALUE INN | 754 HORIZON DR |
| AMERIPRISE FINANCIAL | 743 HORIZON COURT #100 |
| AMERIPRISE FINANCIAL CPA | 2754 COMPASS DR #309 |
| ANABLE LIFE CHIROPRACTIC | 715 HORIZON DR #360 |
| APPLEBEES'S NEIGHBORHOOD GRILL | 711 HORIZON DR |
| APRIL CPAS PC | 715 HORIZON DR #380 |
| AR SERVICES | 715 HORIZON DR #455 |
| ARTHUR S OFARRELL PC | 2754 COMPASS DR #130 |
| ASCENT HOME LOANS, INC. | 743 HORIZON COURT #204 |
| ASPEN LEAF INTERNAL MEDICINE PC | 751 HORIZON CT #202 |
| ASSOCIATED BROKERS & CONSULTANTS | 759 HORIZON DR #B |
| AXA ADVISOR LLC | 744 HORIZON CT #340 |
| B&B APPRAISALS INC | 715 HORIZON DR #330 |
| BANKERS LIFE | 751 HORIZON CT #240 |
| BEANS ABOUT BEANS | 759 HORIZON DR #F |
| BEST EXPLORATION, INC | 743 HORIZON COURT #370 |
| BEST WESTERN INN | 708 HORIZON DR |
| BIO - RAD | 2754 COMPASS DR #350 |
| BLAIR K DRAZIC, ATTORNEY | 743 HORIZON COURT #204 |
| BOB'S LEGAL DELIVERY | 743 HORIZON COURT #364 |
| BRADY CONSTRUCTION | 715 HORIZON DR #490 |
| BURGER KING | 739 HORIZON DR |
| BURKHALTER ENGINEERING | 751 HORIZON CT #245 |
| CAMPBELL HARDBANDING LLC | 751 HORIZON CT #259 |
| CAPITAL OFFICE | 2777 CROSSROADS BLV #4 |
| CBMA - INTERTECH E & E | 743 HORIZON COURT #110 |
| CENTURY 21 HOMESTEAD REALTY | 737 HORIZON DR |
| CENTURY SECURITY ASSOCIATES | 751 HORIZON CT #115 |
| CHEVRON | 760 HORIZON DR #401 |
| CLARION INN | 755 HORIZON DR |
| COLORADO BIO LABS INC | 2764 COMPASS DR #217-6 |
| COLORADO COMMUNITY DENTAL | 2795 SKYLINE CT |

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|---|-------------------------|
| COLORADO DIVISION WATER RESOURCES | 2754 COMPASS DR #175 |
| COLORADO STATE UNIVERSITY-COOPERATIVE EXTENSIONSERVICE | 2764 COMPASS DR #232 |
| COLORADO WEST BOOKKEEPING SRVC INC | 751 HORIZON CT #206 |
| COLORADO WEST INSURANCE | 2782 CROSSROADS BLV |
| COLORAMO CREDIT UNION | 759 HORIZON DR #A |
| COSTELLO SMITH & CO INC CPAS | 751 HORIZON CT #228 |
| COUNTRY INN | 718 HORIZON DR |
| COURTYARD BY MARRIOTT | 765 HORIZON DR |
| CRAWFORD & CO INSURANCE ADJUSTERS | 2754 COMPASS DR #245 |
| CROSSROADS CHIROPRACTIC | 2764 COMPASS DR #109 |
| CROSSROADS DENTAL | 2733 CROSSROADS BLVD |
| CROSSROADS FITNESS CENTER | 2768 COMPASS DR #100 |
| CSU - WATER RESOURCE | 2764 COMPASS DR #217-5 |
| DELTA PETROLEUM | 715 HORIZON DR #170 |
| DENNY'S RESTAURANT | 710 HORIZON DR |
| DEPARTMENT OF VETERAN AFFAIRS | 744 HORIZON CT #130 |
| DEX MEDIA | 760 HORIZON DR #102 |
| DGP CONSULTING ENGINEERS INC | 2764 COMPASS DR #200 |
| DIALYSIS CLINIC INC | 2748 CROSSROADS BLV |
| DONALD GREGORY OPA | 2754 COMPASS DR #301g |
| DONOR ALLIANCE | 2793 SKYLINE CT #D |
| DOUBLE TREE HOTEL | 743 HORIZON DR |
| DR. MARIDEL T ANDRES INC | 2754 COMPASS DR #115 |
| DUFFORD WALDECK MILBURN & KROHN | 744 HORIZON CT #300 |
| EDWARD JONES | 759 HORIZON DR #H |
| ENTERPRISE GAS PROCESSING | 744 HORIZON CT #224 |
| ENZO'S PIZZERIA | 759 HORIZON DR #N |
| EOI SERVICE COMPANY | 2754 COMPASS DR #197 |
| E'TOILE | 715 HORIZON DR #480 |
| FAIRPLAY ELECTRIC CARS | 743 HORIZON COURT #333 |
| FCI CONSULTING & INSPECTION | 743 HORIZON COURT #340 |
| FEATHER LEGAL SERVICES PC | 2754 COMPASS DR #105 |
| FORD CONSTRUCTION COMPANY INC | 2788 PRINTERS CT |
| GENESIS DESIGNS | 2764 COMPASS DR #217-3 |
| GEORGIA HOLT | 743 HORIZON COURT #365 |
| GEOVIC LTD | 743 HORIZON COURT #300A |
| GJ HARLEY DAVIDSON/BUELL MOTORCYCLES | 2747 CROSSROADS BLV |
| GLOBAL CARBON STRATEGIES CORP | 743 HORIZON COURT #383 |
| GOOD PASTURES RESTAURANT | 733 HORIZON DR |
| GRAND MESA CPAS | 2754 COMPASS DR #200 |
| GRAND RIVER PSYCHIATRY | 743 HORIZON COURT #106 |
| GRAND VISTA HOTEL | 2790 CROSSROADS BLV |
| GRIFFIN CONCEPTS INC | 2764 COMPASS DR #112a |
| GW BAYNE / BAYNE OIL COMPANY | 2754 COMPASS DR #308 |
| HALLAM & ASSOCIATES INSURANCE | 743 HORIZON COURT #207 |
| HEREFORD STEAK & SUSHI | 707 HORIZON DR |
| HERITAGE COMPANIES INC | 759 HORIZON DR #C |
| HOLIDAY INN | 2751 CROSSROADS BLVD |
| HORIZON DENTAL CARE | 744 HORIZON CT #240 |
| HORIZON DRIVE SHELL GAS STATION | 745 HORIZON DR |
| HORIZON LIQUORS | 715 HORIZON DR #207 |
| HORIZON VISION CENTER | 2737 CROSSROADS BLV |

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|--|------------------------|
| HORIZONS TRAVEL AGENCY | 715 HORIZON DR #201 |
| HOSPICE & PALLIATIVE CARE OF W. COLO | 2754 COMPASS DR #377 |
| HPP LEASING OFFICE | 743 HORIZON COURT #304 |
| HRL COMPLIANCE SOLUTIONS INC | 744 HORIZON CT #140 |
| HUB INTERNATIONAL SOUTHWEST AGENCY LTD | 2742 CROSSROADS BLV |
| INFORMATION TEC SOLUTIONS CORP | 751 HORIZON CT #108 |
| INSURANCE BENEFITS BY DESIGN LLC | 743 HORIZON COURT #334 |
| INTELITECH | 770 HORIZON DR |
| INTERIM HEALTH CARE | 2764 COMPASS DR #225 |
| INTERNAL MEDICINE ASSOCIATES | 744 HORIZON CT #301 |
| JAMES A LITTLEPAGE | 743 HORIZON COURT #374 |
| JAMES AHLIN INSURANCE AGENCY | 2754 COMPASS DR #301b |
| JIM WEST BUILDERS | 759 HORIZON DR #E |
| KELLER WILLIAMS REALTY | 715 HORIZON DR #225 |
| KIM FUERST | 751 HORIZON CT #205 |
| KISS RADIO STATION | 751 HORIZON CT #225 |
| KONICA MINOLTA | 2793 SKYLINE CT #C |
| KS INDUSTRIES | 2793 SKYLINE CT #B |
| KURT D SPRINGGS, D.O. | 743 HORIZON COURT #105 |
| LA QUINTA INN | 2761 CROSSROADS BLV |
| LANDSCAPE SPECIALISTS | 751 HORIZON CT #256 |
| LCM SOLUTIONS | 751 HORIZON CT #241 |
| LIVINGSTON & MUMBY LLC | 2764 COMPASS DR #200a |
| LOCO GAS & CONVENIENCE STORE | 722 HORIZON DR |
| MACTEC DEVELOPMENT CORP | 751 HORIZON CT #104 |
| MARATHON OIL CO | 743 HORIZON CT #220 |
| MARK N WILLIAMS PC | 2754 COMPASS DR #130 |
| MAX KREY | 2754 COMPASS DR #330 |
| MAXFIELD PETERSON | 751 HORIZON CT #102 |
| MERRITT LS | 743 HORIZON CT #100B |
| MESA COUNTY ASSOCIATION OF REALTORS | 2743 CROSSROADS BLV |
| MESA COUNTY PHYSICIANS /IPA INC | 2764 COMPASS DR #107 |
| MESA INN | 704 HORIZON DR |
| MILLER FINANCIAL SERVICES | 743 HORIZON COURT #205 |
| MONUMENT MEDICAL CONSULTANTS | 2754 COMPASS DR #300 |
| MONUMENT MEDICAL PHYSICIANS LLC | 715 HORIZON DR #200 |
| MOSES LEATHER COMPANY | 759 HORIZON DR #I |
| MOSS, INC. / SBI | 2764 COMPASS DR #101 |
| MOTEL 6 | 776 HORIZON DR |
| NATIONAL FARMERS UNION | 743 HORIZON COURT #342 |
| NEW ENGERGY TECHNOLOGY | 2754 COMPASS DR #301e |
| NORTHSTAR COUNSELING | 2754 COMPASS DR #125 |
| NORWEST CORPORATION | 743 HORIZON COURT #372 |
| OBJ GROUP LTD | 2793 SKYLINE CT #A |
| OCCIDENTAL OIL & GAS CORPORATION (OXY) | 760 HORIZON DR #101 |
| OGLE ENTERPRISES | 743 HORIZON COURT #368 |
| OLD WEST OIL FIELD SERVICES | 759 HORIZON DR #E |
| PANTUSOS RISTORANTE | 755 HORIZON DR |
| PAULINE TUPPER, ATTORNEY | 743 HORIZON COURT #363 |
| PEARSON VUE | 751 HORIZON CT #101 |
| PEASE OIL PARTNERSHIP | 751 HORIZON CT #242 |
| PINNACOL ASSURANCE | 751 HORIZON CT #109 |

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|--|-------------------------|
| PIZZA HUT | 705 HORIZON DRIVE |
| PRECISION DRILLING | 743 HORIZON COURT #201 |
| PRODUCTION TRANSPORT | 743 HORIZON COURT #102 |
| PSI TEST CENTER | 743 HORIZON COURT #203 |
| QUALITY HEALTH NETWORK | 2764 COMPASS DR #203 |
| QUALITY INN | 733 HORIZON DR |
| RAMADA INN | 752 HORIZON DR |
| REGISTERED AGENT, LLC | 743 HORIZON COURT #107 |
| RESIDENCE INN BY MARRIOTT | 767 HORIZON DR |
| RIVER CITY CONSULTANTS INC | 744 HORIZON CT #110 |
| RMHP SOLO SALES OFFICE | 2779 CROSSROADS BLV |
| ROCKY MOUNTAIN HEALTH - WILSON BUILDING | 2784 CROSSROADS BLV |
| ROCKY MOUNTAIN HEALTH PLANS-MAIN OFFICE | 2775 CROSSROADS BLV |
| RONALD J BRENNAN, DISABILITY MNGMT | 751 HORIZON CT #119 |
| RUBY CANYON ENGINEERING | 743 HORIZON COURT #385 |
| RUEGSEGG, SIMONS SMITH & STERN LLC | 743 HORIZON COURT #103 |
| RUSK & RUSK COURT REPORTER | 751 HORIZON CT #111 |
| SCHMUESER/GORDON/MEYER, ENGINEERS | 2768 COMPASS DR #102 |
| SHAW CONSTRUCTION | 760 HORIZON DR #201 |
| SHEETMETAL WORKERS UNION LOCAL #9 | 751 HORIZON CT #116 |
| SISSON FINANCIAL SERVICES | 743 HORIZON COURT #380B |
| SKIN DEEP | 2754 COMPASS DR #104 |
| SOCIAL SECURITY ADMINISTRATION | 744 HORIZON CT #120 |
| SOLAR SALES | 2754 COMPASS DR #301f |
| STANDARD AERO | 2764 COMPASS DR #217-1 |
| STATE FARM INSURANCE OPS CENTER | 2754 COMPASS DR #284 |
| STEPHEN E CASTOR | 743 HORIZON COURT #107 |
| STOP N SAVE #3 CONVENIENCE STORE | 723 HORIZON DR |
| STUART JONES ATTORNEY | 2754 COMPASS DR #301d |
| SUPER 8 | 728 HORIZON DR |
| SYNERGETIC DESIGN | 2754 COMPASS DR #110 |
| TACO BELL | 736 HORIZON DR |
| TENNIS COURTS/RECREATION | 2791 SKYLINE CT |
| THE STYLIST | 759 HORIZON DR #G |
| TOTAL DEPTH INSPECTION SERVICES LLC | 751 HORIZON CT #259 |
| TRAYLOR TOMPKINS & BLACK PC | 751 HORIZON CT #200 |
| TRINTY BAY WAREHOUSE | 2736 CROSSROADS BLV |
| TUSCA II | 2754 COMPASS DR #265 |
| UMETCO MINERALS CORP | 2754 COMPASS DR #280 |
| US DEPT OF AGRICULTURE | |
| US DEPT OF AGRICULTURE: COOPERATIVE EXTENSION SERVICE | |
| US DEPT OF AGRICULTURE: FIELD SERVICE CENTER | 2738 CROSSROADS BLV |
| US DEPT OF AGRICULTURE: NATIONAL APPEALS DIVISION | 764 HORIZON DR, BLDG B |
| US DEPT OF AGRICULTURE: NATURAL RESOURCES CONSERVATION SERVICE | 2738 CROSSROADS BLVD |
| US DEPT OF AGRICULTURE: WILDLIFE SERVICES | |
| US DEPT OF ARMY | |
| US DEPT OF INTERIOR | |
| US DEPT OF INTERIOR: BUREAU OF LAND MGMT | 2815 H RD |
| US DEPT OF INTERIOR: BUREAU OF RECLAMATION | 764 HORIZON DR |
| US DEPT OF INTERIOR: FISH AND WILDLIFE SERVICE | 764 HORIZON DR |
| US DEPT OF INTERIOR: NATIONAL PARK SERVICE | 764 HORIZON DR |
| US DEPT OF INTERIOR: US GEOLOGICAL SURVEY | 764 HORIZON DR |

| | |
|--|------------------------|
| US DEPT OF INTERIOR: US GEOLOGICAL SURVEY, WAREHOUSE | |
| US DEPT OF JUSTICE: US MARSHALL'S OFFICE | 2734 CROSSROADS BLVD |
| US FEDERAL EMERGENCY MANAGEMENT AGENCY | 743 HORIZON CT |
| VALLEY BROKERS | 751 HORIZON CT #247 |
| VALUE ENHANCEMENT GROUP INC | 2754 COMPASS DR #240 |
| VILLAGE INN RESTAURANT | 757 HORIZON DR |
| VISITOR CENTER | 740 HORIZON DR |
| WALKER DRUG | 2754 COMPASS DR #310 |
| WATER RESOURCES DIVISION | |
| WATSON INSURANCE | 743 HORIZON COURT #374 |
| WENDY'S | 750 1/2 HORIZON DR |
| WESTERN COLO. AREA HEALTH EDU. CENTER | 744 HORIZON CT #220 |
| WESTERN COLORADO AFO | 744 HORIZON CT #360 |
| WESTERN HEALTH CARE ALLIANCE | 715 HORIZON DR #485 |
| WESTERN WATER & LAND | 743 HORIZON COURT #330 |
| WILLOW CREEK COMPANIES | 743 HORIZON COURT #250 |
| WW PEPPERS | 753 HORIZON CT |
| YOUNGE & HOCKENSMITH PC | 743 HORIZON COURT #200 |
| ZAO ENGINEERS LTD | 2764 COMPASS DR #230 |
| ZARLINGO'S AUTOMOTIVE SERVICE CENTER | 748 HORIZON DR |
| ZARLINGO'S PROPERTIES LLC | 748 HORIZON DR |
| | |



HORIZON DRIVE

D i s t r i c t

Gateway to Grand Junction®

Funding for this report was provided by
the Horizon Drive Business District.



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SOCIAL AND BEHAVIORAL SCIENCES

CALL 970.248.1696 **WEBSITE** coloradomesa.edu
1100 North Avenue • Grand Junction, CO 81501-3122

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