

# Five County Association of Governments

(Southwestern Utah's Economic Development District)  
Comprehensive Economic Development Strategy Update  
2014-2019



## Utah's Color Country: the "Mighty Five"

Home to Bryce Canyon National Park, Zion National Park, Canyon Lands National Park, Capitol Reef National Park, Cedar Breaks National Monument, Grand Staircase-Escalante National Monument, Glen Canyon National Recreation Area (Lake Powell), the Beaver Dam National Conservation Area, the Red Cliff's National Conservation Area, the High Desert Off-Highway Vehicle Trail, National Scenic Byway 143—Utah's Patchwork Parkway, Zion Scenic Byway, and Scenic Byway 12—Utah's first All-American Road

*This Comprehensive Economic Development Strategy (CEDS) was prepared by the Five County AOG staff in conjunction with the Comprehensive Economic Development Strategy Committee and Steering Committee, through a capacity building grant from the Economic Development Administration. The purpose of the CEDS is to promote a coordinated regional approach to accomplish desired economic development objectives in southwestern Utah.*

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(Southwestern Utah's Economic Development District)  
Economic Development District  
Comprehensive Economic Development Strategy Update 2014 – 2019

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## **I. INTRODUCTION**

The Five County Association of Governments was designated as an Economic Development District (EDD) by the Economic Development Administration (EDA) in April, 1979.

The purpose of this designation was to promote a coordinated, region-wide approach to the economic development efforts of local governments in southwestern Utah. One method used to encourage such coordinated effort is the preparation of this District Comprehensive Economic Development Strategy (CEDS). Every functioning EDD is required to have a current CEDS in place before any jurisdiction in the District is eligible for EDA-funded assistance programs.

In 1994, the Department of Housing and Urban Development initiated the Consolidated Planning process. The Consolidated Plan is intended to focus federal, state and local funding resources to those in most need, usually defined as those with low or moderate incomes. The Consolidated Plan directs regional efforts to foster viable communities that provide decent housing, a suitable living environment and expanding economic opportunities. The Five County annual plan was updated in 2014 and is posted on the Five County AOG website: [www.fivecounty.utah.gov/conplan.html](http://www.fivecounty.utah.gov/conplan.html)

The CEDS and Consolidated Plan both employ economic development process as a primary focus; both processes are incorporated into this document. This allows the AOG staff to consolidate research and documentation efforts, thus freeing up staff resources for additional technical assistance to area jurisdictions. This consolidation also provides consistent and unified policy direction for regional economic development efforts. This document adheres to guidelines provided by both the Economic Development Administration and the Department of Housing and Urban Development.

### **Suggestions for Improvement**

The CEDS Committee and staff encourage readers to submit ideas and suggestions to improve the CEDS process. Such ideas and suggestions will be reviewed with the CEDS Committee by the Executive Director. Suggestions should be in written form and addressed to the Executive Director at P.O. Box 1550, St. George, UT 84771-1550 or [fcaog@fcaog.state.ut.us](mailto:fcaog@fcaog.state.ut.us).

### **History of Cooperative Economic Development in Southwestern Utah**

Local officials in southwestern Utah have a long history of cooperation. Long before the creation of regional development organizations or economic development districts, coordinated, formal economic development efforts were underway in the region.

The first meeting of the Five County Organization was held on April 5, 1956. The meeting was called by the Iron County Commission, and included the commissioners and clerks from Beaver, Garfield, Iron, Kane and Washington counties. Others invited included the editors of all local and Salt Lake City newspapers, KSUB radio, Congressman H. Aldous Dixon, and representatives of the US National Park Service, Dixie National Forest, the Utah State Road Commission, and the Utah Water & Power Board.

Participants discussed “the advisability of forming an organization... for the purpose of working collectively and for the development of the resources of the five counties especially and for progress and development of the entire southern Utah area.”

This collective and united effort continued through the late 1960s, when Governor Calvin Rampton created state planning districts and encouraged local governments to form Associations of Government under the auspices of the state's Inter-local Cooperation Act. Southwestern Utah officials initiated the challenge and created the Five County Association of Governments on May 5, 1972.

Regional economic development continued to be a major focus of effort, culminating in the designation of the Five County Economic Development District on March 17, 1980. Community and economic development staff members have worked continuously since that designation to assist local governments in efforts to improve the economic viability of southwestern Utah.

A vibrant, diversified and healthy southwestern Utah economy is due to more than 50 years of cooperation and successful implementation of well-designed strategic efforts on the part of all participating local governments. Community leaders focus on and effectively market economic strengths to increase economic diversity.

Regional efforts emphasize five major tasks:

- 1) Refine the District Comprehensive Economic Development Strategy (CEDS);
- 2) Assist in local economic development efforts to promote a stable and diversified economic base;
- 3) Coordinate with the activities, programs, and efforts of the emerging base of local economic development professionals (EDP's);
- 4) Strengthen ties to the economic development efforts of the Paiute Tribe of Utah, and
- 5) Foster the emerging role of local officials as Cooperating Agencies in public lands management process.

### **Formation and Role of the Comprehensive Economic Development Strategy**

As southwestern Utah continues to expand and diversify its economic base, local elected officials are under increasing demands for time and resources. Each of the five counties has employed some form of economic development professional expertise. These local economic development professionals have prepared county economic development strategies. The role of the regional EDD continues to shift from direct program activities to one of coordination and programs which benefits the entire region, such as the regional Revolving Loan Fund administered by Five County Association of Governments.

In an effort to more closely involve the cadre of local economic development professionals, and to allow the greater involvement of private sector individuals, the Steering Committee established the Economic Development Advisory Council in early 1998. The Council was reorganized in 2006 to meet new requirements set forth by the Economic Development Administration. Its name was changed to the Comprehensive Economic Development Strategy Committee. The Committee continues to serve as a standing committee to the governing board and provides major direction in the development and implementation of the CEDS.

### **A. CEDS Update Process**

The Five County Association of Governments' CEDS Update 2014-2019 basically addresses the questions of (1) where the counties are today and (2) where they want to be in the future.

Specifically, the CEDS update includes:

- A description of the EDD's problems, needs, opportunities and resources;
- Identification of the region's vision and goals;

- Outline of the strategic direction embodied in the action plan;
- Identification of priority projects for implementation; and
- An update of community indicators that provide a baseline against which the region measures future progress.

## **B. FCAOG Steering Committee**

The membership includes public sector representatives from each county and includes mayors, county commissioners, and elected school board officials. Stake holders include representatives from Southern Utah University and Dixie State University. The membership also includes representatives from the private sector.

## **C. FCAOG Economic Development Committee**

The activities of the EDD and CEDS 2014-2019 have been overseen by the Economic Development Committee (EDC) representing communities within the EDD and state stakeholders such as the economic development professionals, conservation districts, regional workforce, tourism, transportation partners and private sector financing and agriculture business. The EDD's collective regional and economic expertise and knowledge is valuable in defining resources and needs.

Fifteen committees helped guide programs and provided important recommendations to the Five County Steering Committee. These committees include:

- Aging & Nutrition Services Advisory Council - 23 members
- Caregiver Advisory Council - 15 members
- Coordinated Human Services Transportation Planning Committee - 14 members
- Dixie MPO Executive Committee - 8 members
- Dixie MPO Technical Advisory Committee - 12 members
- Eastern Washington County RPO Executive Committee - 6 members
- Eastern Washington County RPO Technical Advisory Committee - 6 members
- Emergency Food and Shelter Board - 15 members
- Human Services Council - 15 members
- Iron County RPO Executive Committee - 9 members
- Iron County RPO Technical Advisory Committee - 8 members
- Natural Resource Committee - 20 members
- Revolving Loan Fund Administration Board - 9 members
- Southern Utah Early Childhood Council - 16 members

# Five County Association of Governments

Southwestern Utah Economic Development District  
Governing Board Roster

Name	Organization	Position
<b>PUBLIC SECTOR REPRESENTATIVES</b>		
Mike Dalton	Beaver County	Commissioner
Nolan Davis	Milford City	Mayor
Clare Ramsay	Garfield County	Commissioner
Ken Platt	Garfield County School District	Elected Board Member <sup>1</sup>
Dale Brinkerhoff	Iron County	Commissioner
Connie Robinson	Paragonah Town	Mayor
Becki Bronson	Iron County School Board	Elected Board Member <sup>1</sup>
Wendy Allan	Kane County School District	Elected Board Member <sup>1</sup>
James Eardley	Washington County	Commissioner
Tracy Dutson	Rockville Town	Mayor
Cal Durfey	Washington County School District	Elected Board Member <sup>1</sup>
<b>PRIVATE SECTOR REPRESENTATIVES</b>		
Robert Houston	Houston's Cafe	Owner
Carolyn White	CD White, Inc. Accounting	Owner
Jerry Taylor	JT Steel, Inc.	Owner
Jim Matson	Vermillion Services, Inc.	Owner
<b>STAKEHOLDER ORGANIZATIONS</b>		
Frank Lojko	Dixie State University	VP of Student Services
Wes Curtis	Southern Utah University	Director of Regional Services

<sup>1</sup> School board members in Utah are non-partisan *elected* officials representing county-wide districts.

# Five County Association of Governments

Southwestern Utah Economic Development District  
 Comprehensive Economic Development Strategy Committee

Name	Organization	Position
<b>PUBLIC SECTOR REPRESENTATIVES</b>		
Scott Albrecht	Economic Development Professional	Commission Assistant
Wes Curtis	Higher Education	Director of Regional Services
Justin Fischer	Economic Development Professional	County Planner
Scott Hirschi	Economic Development Professional	Director
Tyce Palmer	Conservation District	Zone Coordinator
Gregg McArthur	Chamber of Commerce	President and CEO
Brennan Wood	Economic Development Professional	Director
Gaylord Robb	Piute Indian Tribe of Utah	Economic Development
<b>PRIVATE SECTOR REPRESENTATIVES</b>		
Karen Alvey	Alvey Construction	Owner
Matt Brown	Canyon Book	Owner
Nancy Dalton	D9 Custom Cuts	Owner
Allen Henrie	Henrie's Herefords	Owner
Nick Lang	Lang Co.	Owner
Jim Matson	Vermillion Services	Owner
Jean Seiler	Rubys Inn	Manager
Thomas Sawyer	Suh'Dutsing Technologies	President

## II. EDD ECONOMIC ANALYSIS

### A. REGIONAL PROFILE

The Southwest District, located in the southwest region of Utah and bordering Nevada and Arizona, encompasses five counties – Beaver, Garfield, Iron, Kane and Washington – and is often referred to as the Five County District. The District contains 38 incorporated municipalities working within the Five County Association of Governments.

#### Geography and Environment

The geography and environment of a region are key considerations in community planning. As small towns and cities grow, planners must consider overall geographic layouts and the many environmental issues posed by any given site. It is important to understand lands being developed and the full range of limitations and negative outcomes. The Five County District is no exception, and has many unique issues pertaining to its distinct geography and environment.

## **Physical Description**

The region is located near the heart of the Intermountain West. The five counties are contained in two major physiographic provinces. Most of Beaver, Iron, and Washington County lay within the Basin and Range province, which generally consists of north-south trending mountain ranges separated by broad arid valleys with interior drainage, and vegetated with sagebrush and other plants of the Great Basin. Garfield and Kane counties are located in the Colorado Plateau, which consists of uplifted sedimentary rock strata vegetated with desert sage scrub.

On a more localized scale, the area is also speckled with a variety of topographic features. Some of this area has experienced a great amount of volcanic activity, which is evident in extinct volcanoes, mountains, great lava fields, and mesas. Geologic forces have uplifted huge portions of the land, and have created great rifts in others. Of particular notoriety are the erosional features of the area including the great canyons and cliffs carved by water and wind that make up the national and state parks, such as Zion, Bryce, and Snow Canyon.

The soil in this area consists mostly of aridisols, an iron-rich desert soil that can be quite productive if cultivated. Aridisols are used mainly for range, wildlife, and recreation. Because of the dry climate in which they are found, they are not used for agricultural production unless irrigation water is available. Native to the valleys throughout most the region is a variety of grasses, junipers, and piñon pines, while xerophytes and desert scrub are native to the lower elevations. Farming has produced a diversity of crops, including barley, alfalfa, hay, and cotton (which earned the southern region the name of "Dixie"). Much of the region has also been prime land for ranching cows, sheep, and horses.

## **Climate**

Because of its general location, the region is mostly semi-arid. As moist air moves in from the Pacific Ocean, it is forced to rise over the Sierra Nevada Mountain Range, which causes it to cool and drop its precipitation, leaving very little moisture left for the region East of the Sierra Nevadas. While all of the Intermountain West is generally dry due to this phenomenon, the aridity in southwestern Utah is accentuated by its lower latitude, which makes it warmer than most regions to the north. Much of this area is characterized by lower elevation, which also increases the mean annual temperature. For example, the area near St. George City is a warm climate, which is unique to the state of Utah, can be attributed to the fact that it has the lowest elevation of any Utah city and lies at the very southern end of the state. In fact, this area, also known as Utah's Dixie, has the highest mean annual temperatures in Utah, averaging 61-62 degrees Fahrenheit. It also boasts the highest maximum temperature ever recorded in Utah, which was 117 degrees Fahrenheit, observed on July 5, 1985.

Though scholars classify most of the region as "desert," only the areas with lower elevations are considered "hot" deserts, or regions where the winters average above 32 degrees Fahrenheit. This would include most of Washington County. This region usually does not have snow in the winter, and has extremely warm summers. The rest of the region, which consists of higher elevations, is considered to be a "cool" desert, with snowy winters and warm summers. Some exceptions exist over the highest elevations, mountainous regions such as Brian Head, which are classified as "undifferentiated highlands" since they experience cooler temperatures and higher humidity than the rest of the area. These regions generally have very cold, snowy winters and cool summers.

Like the rest of the Intermountain West, during the winter, most precipitation results from the passage of mid-latitude cyclones, while in the summer, convection from localized heating can trigger isolated thunderstorms. Without the moderating effects of the ocean, and therefore, cloud cover from water vapor in the air, this region experiences great daily and yearly fluctuations in temperature.

The nature of the climate in this region leaves it susceptible to a few hazardous weather recurrences. Although most of the country is subject to flash floods, they are particularly damaging in this region since the soil is dry, somewhat non-vegetated, and easily eroded.

Threats to human lives and damage to property are not only a result of rapidly rising waters, but of catastrophic mud slides as well. This area is also subject to tornadoes, although they are a rare occurrence. More common in the warmer regions are dust devils, which are rarely severe enough to damage property. The higher elevations always have the potential for blizzards, cold spells, and avalanches in the winter. The entire region is susceptible to fires resulting from lightning strikes in the spring and summer, which is actually a frequent occurrence.

### **Demographics and Population**

Over the past 40 years, the southwest region has experienced extraordinary population growth. From 1970 to 2007, population in the region increased at an average annual rate of 4.9 percent, compared to a statewide average annual rate of 2.6 percent. By 2007, the number of persons living in southwest Utah totaled 203,499; an increase of 168,275 persons since the 1970 census. Net in-migration has been the primary driver of regional population growth, accounting for 71 percent of the population increase from 1970 to 2007.

The impressive growth in the region is centered in Washington County, with some spillover into Iron County, and to a much lesser extent Kane County. Population growth has essentially bypassed Beaver and Garfield counties. In the 1960 census, Washington and Iron counties accounted for two-thirds of the regional population. Ten years later their proportion had risen to nearly three-fourths of regional population. From the 1970s on, the population growth paths of the five counties of southwest Utah diverged dramatically, and Washington County became the epicenter of regional growth. The minority population of the region in 2000 was 12,142, or 8.6 percent of total population. Again, this is significantly lower than the statewide share of 14.7 percent. More than half the minorities in the region are Hispanic and almost 18 percent are Native American.

Based on census data, the region as a whole had net out-commuting of 971 in 2000. The top three destination counties of the 3,075 regional out-commuters were Clark County, Nevada, Coconino County, Arizona, and Salt Lake County.

The EDD of Five County encompasses over 11 million acres of land in southwestern Utah. The Association serves 38 municipalities (incorporated cities and towns), five county-wide school districts and the county jurisdictions of Beaver, Garfield, Iron, Kane, and Washington.

## Local Jurisdictions in the Five County District

Beaver County	Garfield County	Iron County	Kane County	Washington County
Beaver City Milford Minersville	Antimony Boulder Bryce Canyon City Cannonville Escalante Hatch Henrieville Panguitch Tropic	Brian Head Cedar City Enoch Kanarrville Paragonah Parowan  <b>Piute Indian Tribe of Utah</b> Cedar Band Indian Peaks Band Shivwits Band	Alton Big Water Glendale Kanab Orderville	Apple Valley Enterprise Hildale Hurricane Ivins LaVerkin Leeds New Harmony Rockville St. George Santa Clara Springdale Toquerville Virgin Washington City





The EDD is bounded by Southeastern Utah Association of Local Governments on the east, the Six County Association of Governments on the north, the state of Nevada to the west, and Arizona to the south. The political jurisdictions within the region include 38 incorporated communities, and the Paiute Indian Tribe of Utah that includes the Cedar, Indian Peaks, and Shivwits Band. The EDD includes all of the Dixie National Forest and some of the Fishlake National Forest. The Bureau of Land Management (BLM) lands fall under four field offices: the Cedar City Office, the St. George Field Office, the Kanab Field Office, and the Grand Stair Case-Escalante National Monument.

Zion National Park had an estimated economic impact of \$147 million in tourist dollars in 2013. Bryce Canyon National Park generated \$105.7 million. Cedar Breaks National Monument generated about \$25.7 million in 2013. These numbers were reported by the National Park Service in July 2014. The Bureau of Reclamation has responsibility for Glen Canyon Dam, which forms Lake Powell, under the Department of the Interior.

Utah's tourism industry reported positive economic gains to the Utah Legislature's Economic Development Interim Committee at their July 2014 meeting. Vicki Varela, of the Utah Office of Tourism, provided the committee with a great update on the tourism industry's performance. Joining the discussion were Natalie Gochnour and Jennifer Leaver from the University of Utah's Bureau of Economic & Business Research.

Vicki reported that Utah's tourism industry is performing well and delivering a very high return on the Tourism Marketing Performance Fund investment, the results of which are as follows:

Utah's Ski Product:	2013-2014 season was the 3rd highest year with 4.2 million skier days
Utah's National Park Visits:	Jan-May 2014 shows an 11.4% increase
State Tax Collections: (Jan-June 2014)	Transient Room Tax (TRT): 7.5% increase Municipality TRT: 11.0% increase Car Rental Tax: 21.2% increase Restaurant Tax: 16.5% increase



## UTAH TRAVEL & TOURISM PROFILE

# Beaver County

**Beaver County**, located in southwestern Utah, had a 24.2% share of leisure and hospitality<sup>1</sup> jobs in 2013, ranking **9th** statewide. Beaver County has a diverse history that includes Native American inhabitants, famous explorers, western outlaws, Mormon settlers, military personnel and mineral prospectors. Rockhounds are drawn to Beaver County's deposits of smoky quartz and feldspar in and around Rock Corral Recreation Area. In the environs of Millsite State Park, visitors can camp, ATV, mountain bike, fish and golf. Beaver is also home to Eagle Point Ski Resort, Frisco Ghost Town, and the more recent "Crusher in the Tushar" bike race. In addition, Beaver receives supplemental visitation from motorists traveling the I-15 corridor between Salt Lake City and Las Vegas/Los Angeles.

Total tourism-related tax revenues grew 6.3% in 2013, due in large part to increased transient room tax revenue. In 2013, gross taxable sales in the leisure and hospitality sector increased 11.1% and were highest in the summer, with a significant increase from the previous year in arts, entertainment and recreation sales between January and September. While Beaver County's leisure and hospitality sector experienced a 6.6% increase in jobs it also experienced a 5.3% decrease in wages. Since 2010, Beaver County's leisure and

hospitality job counts fluctuate from quarter to quarter, with highs during different quarters in different years. In 2013, Beaver County reported 25 additional amusement and recreation jobs and four additional foodservices jobs (annual averages).

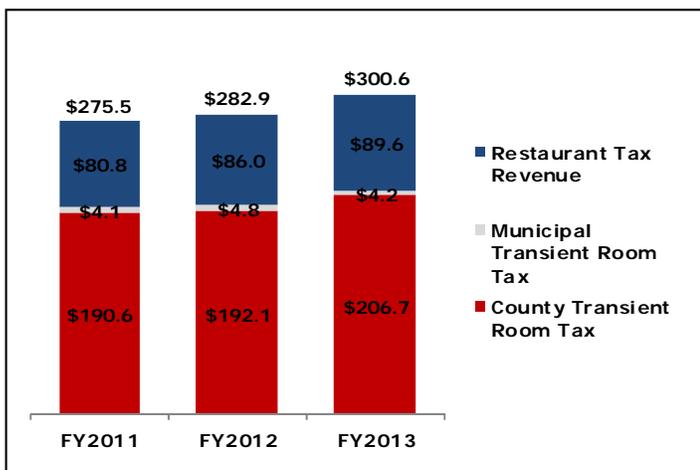
In both 2012 and 2013, Beaver, Millard and Sevier Counties' hotel occupancy rates peaked during the summer months, with lows in the winter months. The average annual occupancy rate in this region increased 1.2%, the average daily room rate increased 1.6% and revenue per available room was up 2.8%. Millsite State Park reported 20,770 visitors in 2013.

Tourism At-A-Glance			
Statewide Tourism Ranking: <b>9th*</b>			
	2012	2013	% Change
Beaver County Population	6,480	6,459	-0.3%
Utah Population	2,855,287	2,900,872	1.6%
Tourism-Related Tax Revenues (Fiscal Year; In Thousands)	\$282.9	\$300.6	6.3%
Leisure & Hospitality Taxable Sales (Calendar Year; In Thousands)	\$13,147.1	\$14,602.0	11.1%
Total Direct Leisure & Hospitality Jobs	358	382	6.6%
Total Direct Leisure & Hospitality Wages (In Millions)	\$5.5	\$5.2	-5.3%
Average Annual Hotel Occupancy Rate	51.2%	51.8%	1.2%

\*Based on share of private leisure and hospitality jobs to total private jobs.

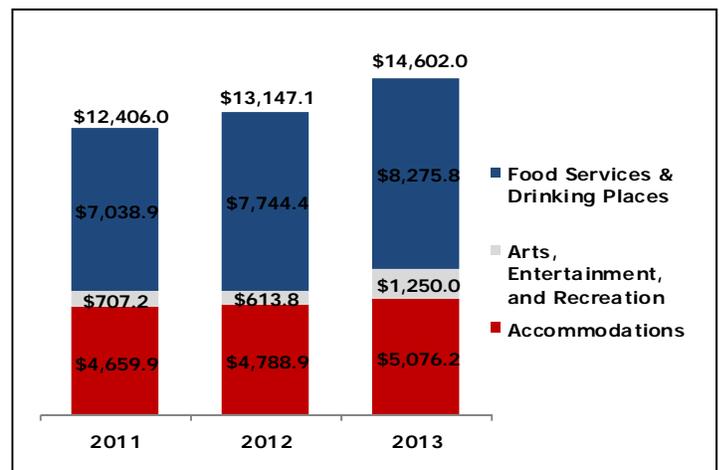
<sup>1</sup>The "Leisure and Hospitality" sector includes NAICS 71 and 72.

**Tourism-Related Tax Revenues**  
(In Thousands of Dollars)



Source: Utah State Tax Commission

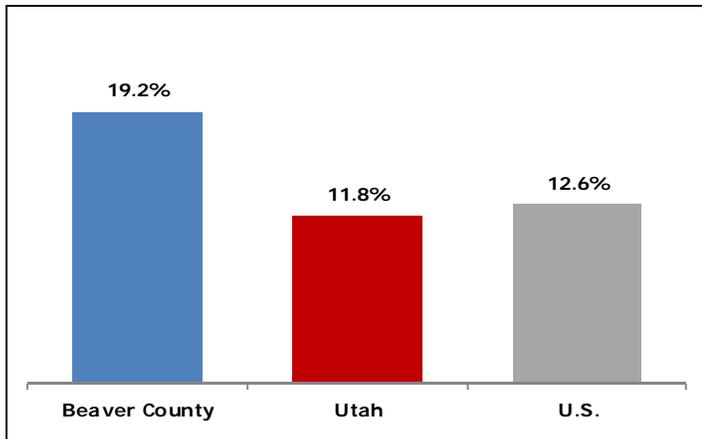
**Gross Leisure & Hospitality Taxable Sales**  
(In Thousands of Dollars)



Source: Utah State Tax Commission

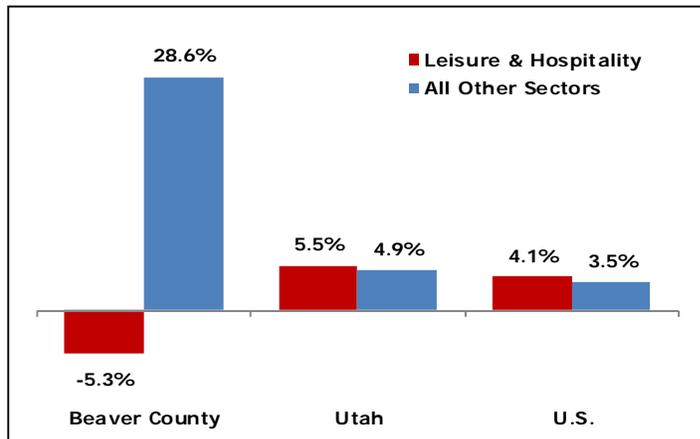
# Utah Travel & Tourism Profile: Beaver County

## Private Leisure & Hospitality Employment: Share of Total 2013



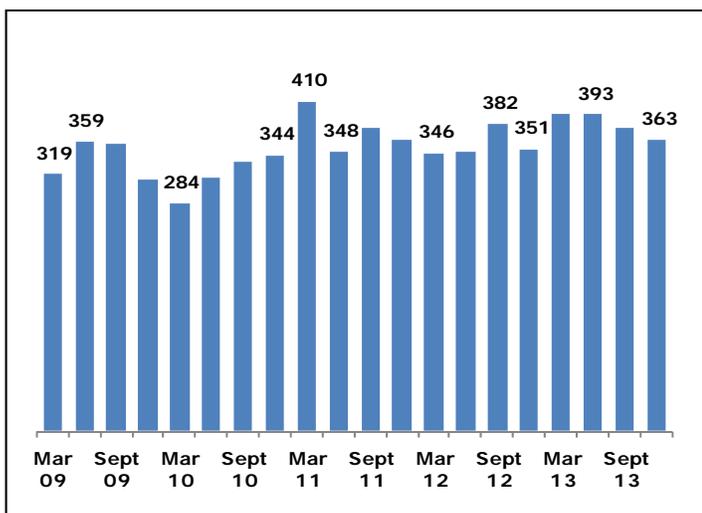
Source: U.S. Bureau of Labor Statistics and Utah Department of Workforce Services

## Year-Over Percent Change in Wages 2012 to 2013



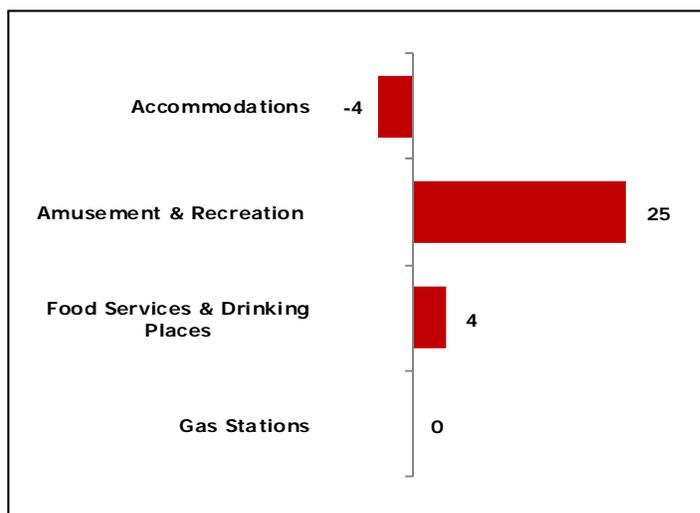
Source: U.S. Bureau of Labor Statistics and Utah Department of Workforce Services

## Private Leisure & Hospitality Jobs by Quarter



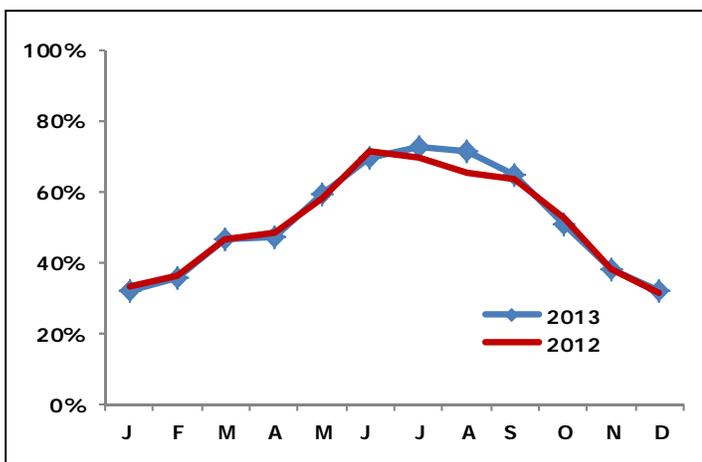
Source: U.S. Bureau of Labor Statistics

## Year-Over Change in Tourism-Related Jobs: 2012-2013



Source: Utah Department of Workforce Services

## Monthly Hotel Occupancy Rates: Beaver-Millard-Sevier



Source: Smith Travel Research

## Accommodations Industry: County vs. State

Beaver-Millard-Sevier Counties			
	2012	2013	% Change
Occupancy Rate	51.2%	51.8%	1.2%
Average Daily Room Rate	\$70.54	\$71.64	1.6%
Revenue Per Available Room	\$36.14	\$37.14	2.8%
Statewide			
Occupancy Rate	59.0%	59.1%	0.2%
Average Daily Room Rate	\$96.84	\$99.45	2.7%
Revenue Per Available Room	\$57.16	\$58.79	2.9%

Source: Smith Travel Research



## UTAH TRAVEL & TOURISM PROFILE

# Garfield County

**Garfield County**, located in south-central Utah, had a 54.1% leisure and hospitality<sup>1</sup> share of total private jobs in 2013, ranking **2nd** statewide. Garfield County's vast rangelands and forest reserves have supported traditional ranching and lumber livelihoods since Mormon settlement in the late 19th century. After the creation of Bryce Canyon National Park in 1928, Garfield County has experienced a growing tourism economy. In the early 1990s, Garfield County officials paved a portion of the Burr Trail leading into Capitol Reef National Park from Boulder, granting improved accessibility to the park. President Clinton's 1996 designation of the nation's largest, and perhaps most controversial, national monument (Grand Staircase-Escalante), has drawn even more attention to the area. In addition to serving as the gateway to two national parks and one national monument, Garfield County boasts Anasazi State Park Museum, Escalante Petrified Forest State Park and offers access to Kodachrome Basin State Park. It is also home to beautiful Boulder Mountain, popular Scenic Byway 12, historic Hole in the Rock Road, and Panguitch Lake.

Total county transient room tax revenue grew 24.8% in fiscal year 2013, with the most growth noted in county and municipality (Escalante) transient room taxes. Garfield County's leisure and hospitality sales were up 5.2% in 2013 and were highest in the spring and summer months, followed by fall. Similarly, 2013 winter and spring lodging and restaurant sales were higher than 2012 sales, however total fall leisure and hospitality sales were down 13.1% from 2012 – most likely due to the government shutdown of national parks in October 2013.

Garfield County's leisure and hospitality jobs declined 6.8% in 2013 while wages remained relatively flat. Since 2010, Garfield

Tourism At-A-Glance			
Statewide Tourism Ranking: <b>2nd*</b>			
	2012	2013	% Change
Garfield County Population	5,102	5,083	-0.4%
Utah Population	2,855,287	2,900,872	1.6%
Tourism-Related Tax Revenues (Fiscal Year; In Thousands)	\$1,603.0	\$2,000.5	24.8%
Leisure & Hospitality Taxable Sales (Calendar Year; In Millions)	\$61.7	\$64.9	5.2%
Leisure & Hospitality Jobs	959	894	-6.8%
Leisure & Hospitality Wages (Millions)	\$16.4	\$16.6	1.1%
Average Annual Hotel Occupancy Rate (Garfield-San Juan-Wayne Counties)	55.2%	54.5%	-1.3%
Bryce Canyon National Park (Annual Recreation Visitation)	1,385,352	1,311,875	-5.3%

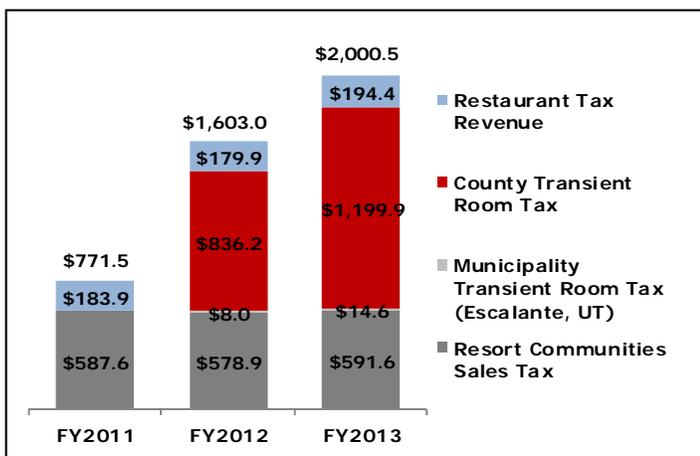
\*Based on share of private leisure and hospitality jobs to total private jobs.

<sup>1</sup>The "Leisure and Hospitality" sector includes NAICS 71 and 72.

County's fall and winter leisure and hospitality sector jobs have doubled every spring and summer, reflecting tourism seasonality.

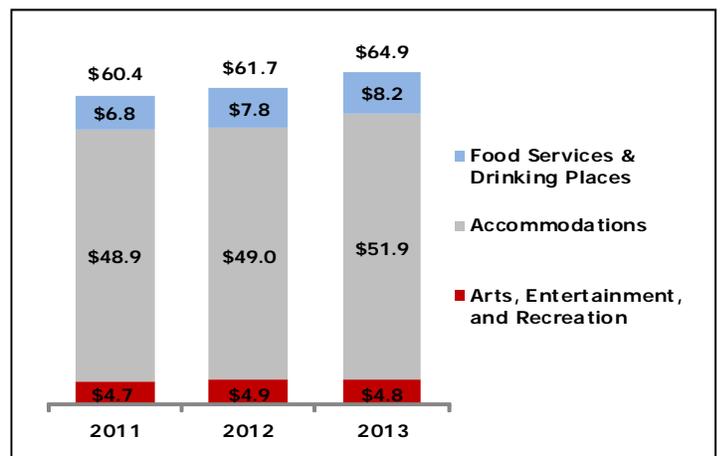
According to Smith Travel Research data, hotel occupancy rates in Garfield, San Juan, and Wayne Counties are consistently highest from May through September with lows November through February. The annual average hotel occupancy rate in Garfield and surrounding counties declined slightly (-1.3%), while the average daily room rate and revenue per available room remained flat. In 2013, Bryce Canyon National Park reported 1,311,875 recreation visits (down 5.3% from 2012), Escalante Petrified Forest State Park reported 53,443 visitors and Anasazi Museum State Park reported 19,325 visitors.

**Tourism-Related Tax Revenues**  
(In Thousands of Dollars)



Source: Utah State Tax Commission

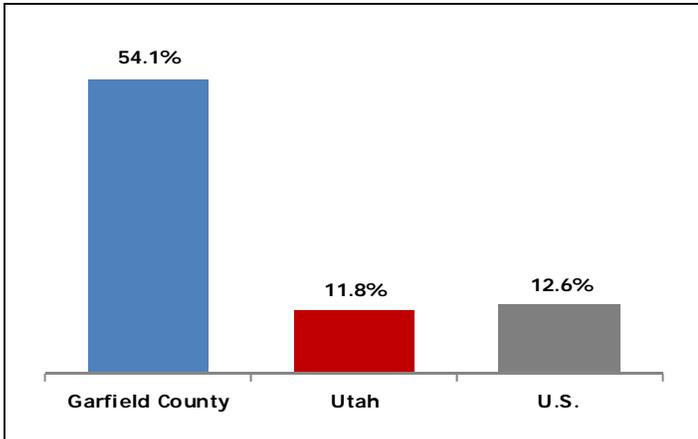
**Gross Leisure & Hospitality Taxable Sales**  
(In Millions of Dollars)



Source: Utah State Tax Commission

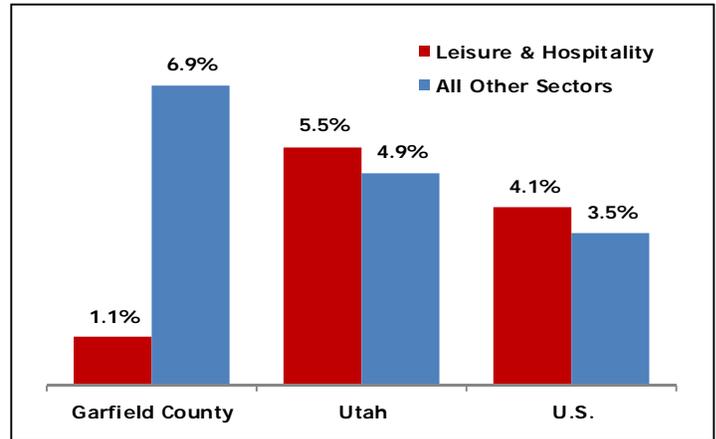
# Utah Travel & Tourism Profile: Garfield County

## Private Leisure & Hospitality Employment: Share of Total 2013



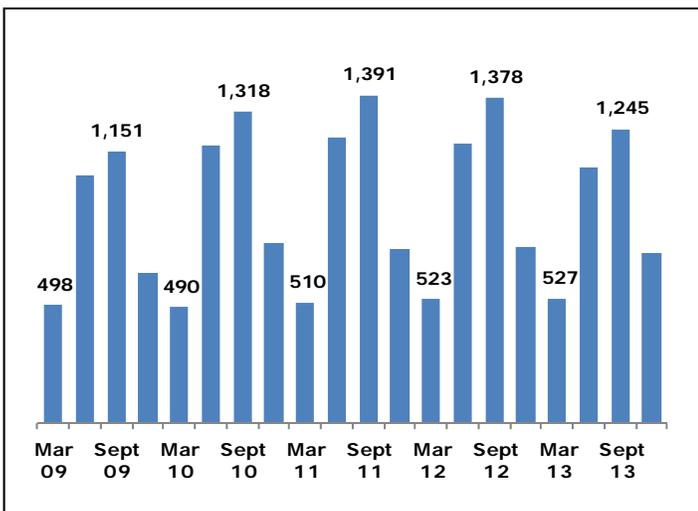
Source: U.S. Bureau of Labor Statistics and Utah Department of Workforce Services

## Year-Over Percent Change in Wages 2012 to 2013



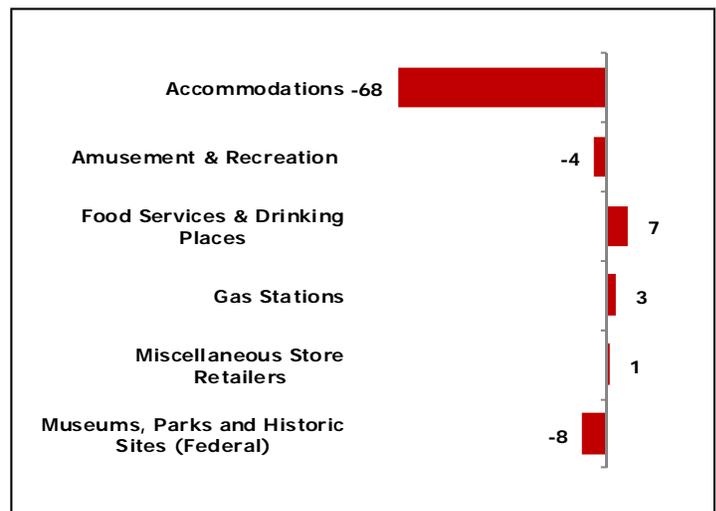
Source: U.S. Bureau of Labor Statistics and Utah Department of Workforce Services

## Private Leisure & Hospitality Jobs by Quarter



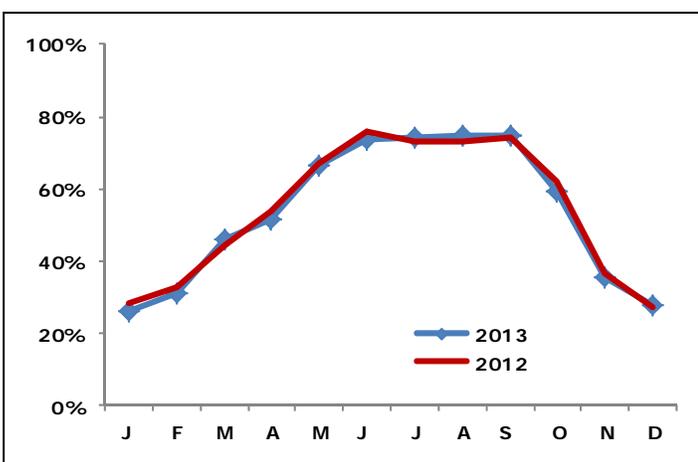
Source: U.S. Bureau of Labor Statistics

## Year-Over Change in Tourism-Related Jobs: 2012-2013



Source: Utah Department of Workforce Services

## Monthly Hotel Occupancy Rates: Garfield-San Juan-Wayne

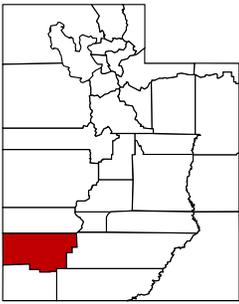


Source: Smith Travel Research

## Accommodations Industry: County vs. State

Garfield-San Juan-Wayne Counties			
	2012	2013	% Change
Occupancy Rate	55.2%	54.5%	-1.3%
Average Daily Room Rate	\$89.62	\$90.19	0.6%
Revenue Per Available Room	\$49.45	\$49.13	-0.6%
Statewide			
Occupancy Rate	59.0%	59.1%	0.2%
Average Daily Room Rate	\$96.84	\$99.45	2.7%
Revenue Per Available Room	\$57.16	\$58.79	2.9%

Source: Smith Travel Research



## UTAH TRAVEL & TOURISM PROFILE

# Iron County

**Iron County**, located in southwestern Utah, had an 18.5% leisure and hospitality<sup>1</sup> share of total private jobs in 2013, ranking **12th** statewide. Iron County has a history as varied as its physiography. From the Escalante Desert and Great Basin ranges in the west to the High Plateau forests in the east, Iron County houses granaries and pit houses of the Fremont people (AD 750-1250), as well as pioneer log homes and English two-bay barns. Remnants of Iron County's coal and iron mining history (late 19th century) are showcased at Frontier Homestead State Park in its largest town, Cedar City. In fact, Cedar City, known as "Festival City USA," holds over 17 festivals annually, including the renowned Utah Shakespeare Festival that runs from June through October and attracts over 141,000 visitors. Other attractions in Iron County are Cedar Breaks National Monument and Brian Head Ski Resort. Interstate 15, a main thoroughfare between Salt Lake City and Las Vegas/Los Angeles, passes through the eastern edge of Iron County creating supplemental visitation.

Total tourism-related tax revenues grew 7.1% in fiscal year 2013, due in large part to increases in county transient room tax revenue. In 2013, total leisure and hospitality taxable sales grew 5.8% and were highest between July and December, dipping a bit between April and June. Iron County's leisure and hospitality sector experienced a 1.8% increase in jobs and a 6.7% increase in wages – an annual average wage increase higher than both the state and national average. Since 2010, Iron County's spring/summer leisure and hospitality job sector has increased by an average of 7% every fall/winter, reporting the greatest number of leisure jobs in the winter. In 2013, the

### Tourism At-A-Glance

Statewide Tourism Ranking: <b>12th*</b>			
	2012	2013	% Change
Iron County Population	46,773	46,780	0.0%
Utah Population	2,855,287	2,900,872	1.6%
Tourism-Related Tax Revenues (Fiscal Year; In Thousands)	\$1,607.4	\$1,721.0	7.1%
Leisure & Hospitality Taxable Sales (Calendar Year; In Millions)	\$75.9	\$80.3	5.8%
Leisure & Hospitality Jobs	1,965	2,001	1.8%
Leisure & Hospitality Wages (Millions)	\$22.8	\$24.4	6.7%
Average Annual Hotel Occupancy Rate (Iron County)	52.2%	53.5%	2.5%

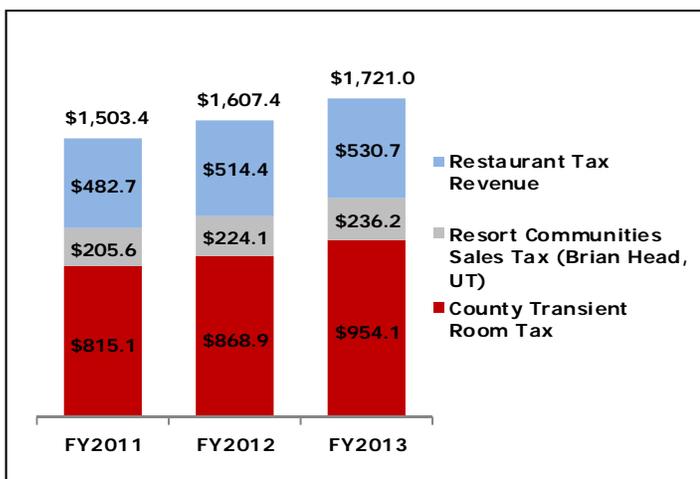
\*Based on share of private leisure and hospitality jobs to total private jobs.

<sup>1</sup>The "Leisure and Hospitality" sector includes NAICS 71 and 72.

foodservice sector added the most new jobs (46) followed by amusement and recreation (7) and miscellaneous retail (7).

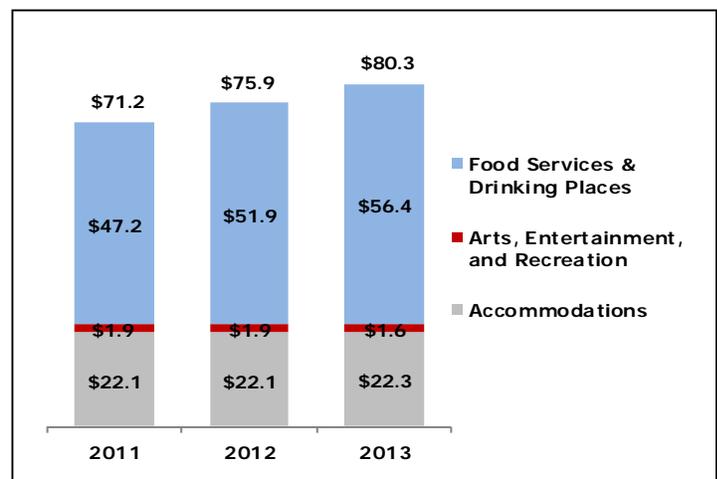
According to 2012 and 2013 Smith Travel Research data, hotel occupancy rates in Iron County experienced a small peak in March, followed by a drop in April, a larger peak in July, and then remained high through October before dropping again. Iron County's annual average hotel occupancy rate, daily room rate and revenue per available room all outpaced statewide averages. In 2013, Cedar Breaks National Monument reported 466,450 recreation visits (down 27.1% from 2012). Iron County's Frontier Homestead State Park reported 13,005 visitors.

**Tourism-Related Tax Revenues**  
(In Thousands of Dollars)



Source: Utah State Tax Commission

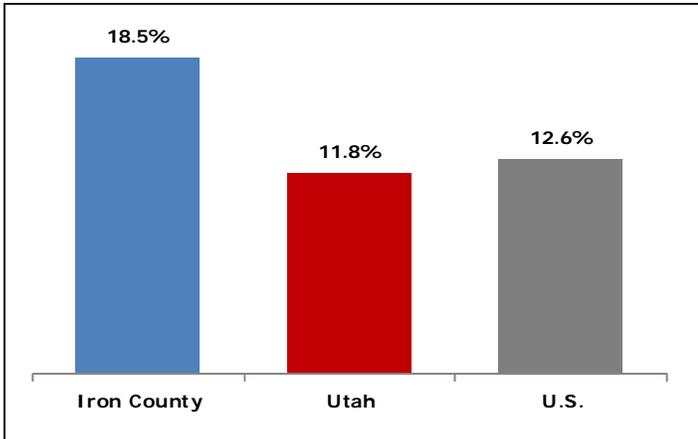
**Gross Leisure & Hospitality Taxable Sales**  
(In Millions of Dollars)



Source: Utah State Tax Commission

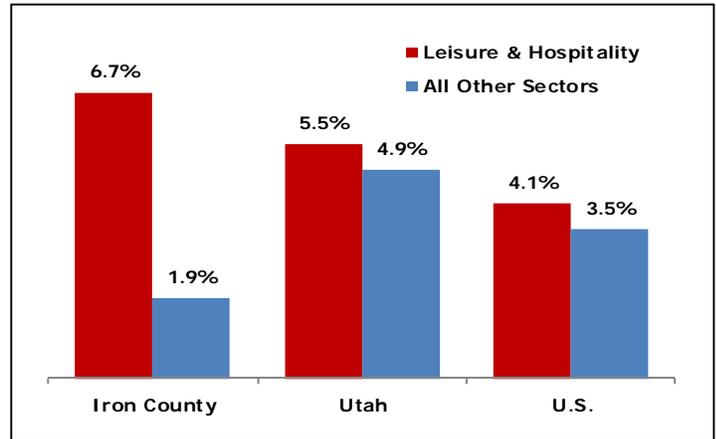
# Utah Travel & Tourism Profile: Iron County

## Private Leisure & Hospitality Employment: Share of Total 2013



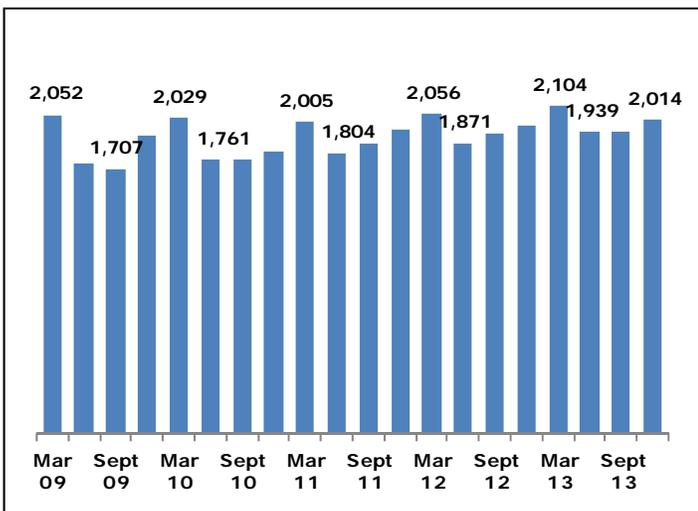
Source: U.S. Bureau of Labor Statistics and Utah Department of Workforce Services

## Year-Over Percent Change in Wages 2012 to 2013



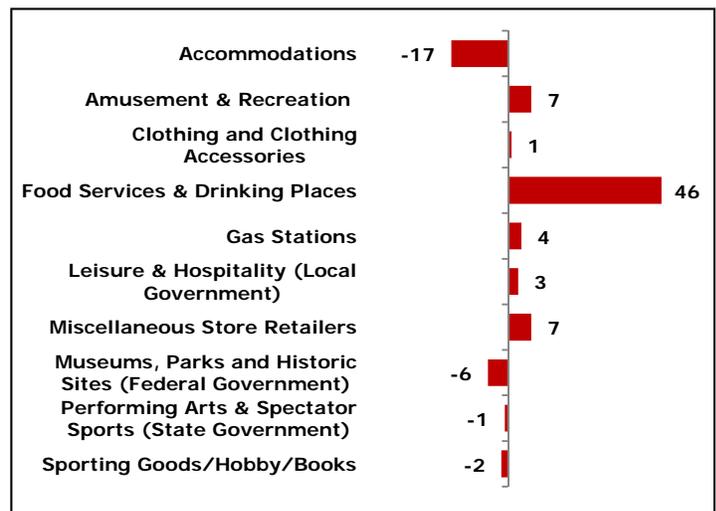
Source: U.S. Bureau of Labor Statistics and Utah Department of Workforce Services

## Private Leisure & Hospitality Jobs by Quarter



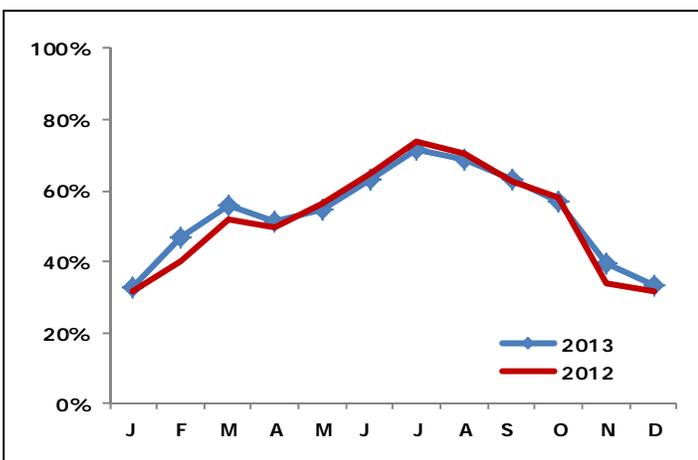
Source: U.S. Bureau of Labor Statistics

## Year-Over Change in Tourism-Related Jobs: 2012-2013



Source: Utah Department of Workforce Services

## Monthly Hotel Occupancy Rates:



Source: Smith Travel Research

## Accommodations Industry: County vs. State

Iron County			
	2012	2013	% Change
Occupancy Rate	52.2%	53.5%	2.5%
Average Daily Room Rate	\$73.93	\$75.97	2.8%
Revenue Per Available Room	\$38.56	\$40.67	5.5%
Statewide			
Occupancy Rate	59.0%	59.1%	0.2%
Average Daily Room Rate	\$96.84	\$99.45	2.7%
Revenue Per Available Room	\$57.16	\$58.79	2.9%

Source: Smith Travel Research



## UTAH TRAVEL & TOURISM PROFILE

# Kane County

**Kane County**, located along the Utah/Arizona border in south-central Utah, had a 43.6% leisure and hospitality<sup>1</sup> share of total private jobs, ranking **5th** statewide. Kane County comprises Colorado Plateau landscape and is known as the gateway to three national parks (Bryce Canyon, Zion and Grand Canyon), three national monuments (Pipe Springs, Cedar Breaks, and Grand Staircase-Escalante) and Glen Canyon National Recreation Area. In addition, Kane County is home to Kodachrome Basin and Coral Pink Sand Dunes State Parks. The county seat of Kanab, which is Kane County's largest town in population, became known as "Little Hollywood" in the 1930s due to serving as the set for several Hollywood films and westerns. Kanab is centrally located on Highway 89 and offers a variety of lodging options, restaurants, museums and galleries for tourists. It is also home to Best Friends Animal Sanctuary, which attracts animal lovers from around the world. Other places of interest within the County's borders are Grosvenor Arch, Hole in the Rock Road and the historic home of western artist Maynard Dixon.

Total county transient room tax revenue grew 6.4% in fiscal year 2013, with the most growth noted in county and municipality (Kanab and Glendale) transient room taxes. Kane County's 2013 leisure and hospitality sales were highest in the summer months; however, winter accommodations and foodservice sales were up 56% and 14%, respectively, from the previous winter. Overall, lodging and restaurant sales were strong during the first three quarters of 2013, but showed a decline in the fourth quarter of 2013, which is most likely due to the government shutdown of national parks during this time.

Tourism At-A-Glance			
Statewide Tourism Ranking: <b>5th*</b>			
	2012	2013	% Change
Kane County Population	7,277	7,260	-0.2%
Utah Population	2,855,287	2,900,872	1.6%
Tourism-Related Tax Revenues (Fiscal Year; In Thousands)	\$5,116.3	\$5,442.7	6.4%
Leisure & Hospitality Taxable Sales (Calendar Year; In Millions)	\$73.2	\$76.3	4.2%
Leisure & Hospitality Jobs	986	1,012	2.6%
Leisure & Hospitality Wages (In Millions)	\$20.8	\$21.8	4.8%
Average Annual Hotel Occupancy Rate (Kane County)	57.1%	56.3%	-1.4%

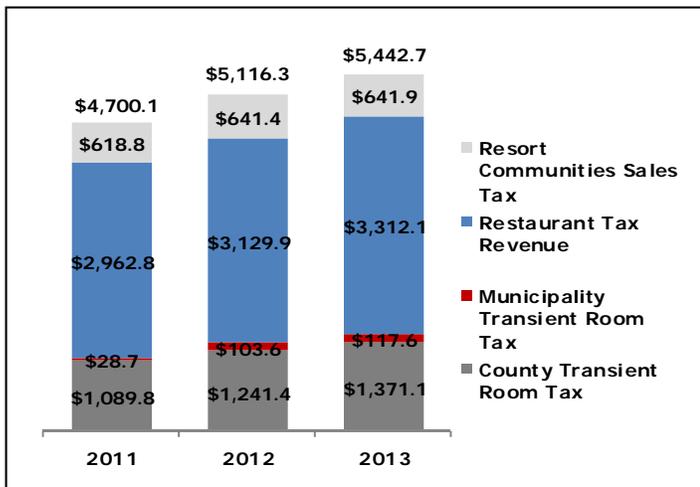
\*Based on share of private leisure and hospitality jobs to total private jobs.

<sup>1</sup>The "Leisure and Hospitality" sector includes NAICS 71 and 72.

Kane County's leisure and hospitality jobs and wages both showed growth in 2013 with a 2.6% increase in jobs and a 4.8% increase in wages. Since 2010, Kane County's fall/winter leisure and hospitality jobs have increased by an average of 63% every spring/summer. In 2013, accommodations employment experienced the largest growth, adding 24 new jobs (average).

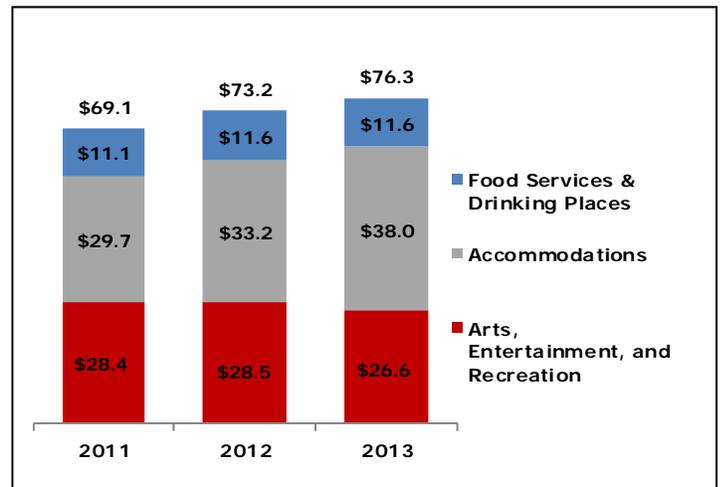
According to Smith Travel Research data, Kane County's 2012 and 2013 hotel occupancy rates were highest from May through September, with annual lows in December and January. The annual average hotel occupancy rate in Kane County declined slightly (-1.4%) while the average daily room rate was up 2.0%. Kodachrome Basin and Coral Pink Sand Dunes State Parks reported 66,956 and 63,515 visitors, respectively.

**Tourism-Related Tax Revenue**  
(In Thousands of Dollars)



Source: Utah State Tax Commission

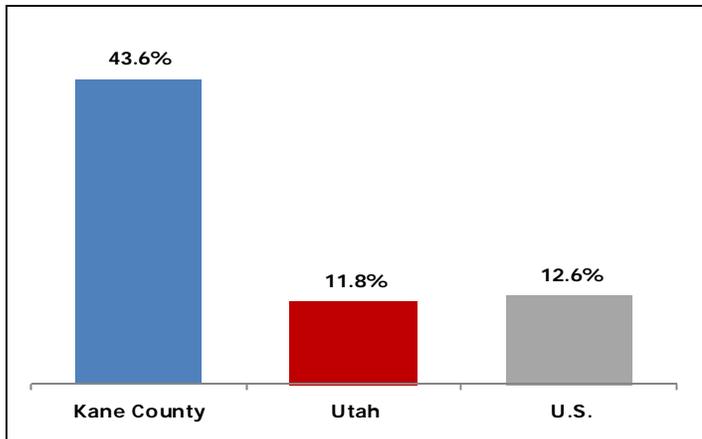
**Gross Leisure & Hospitality Taxable Sales**  
(In Millions of Dollars)



Source: Utah State Tax Commission

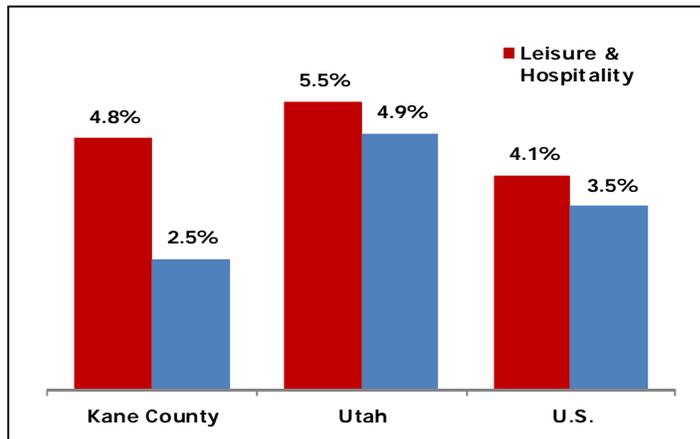
# Utah Travel & Tourism Profile: Kane County

## Private Leisure & Hospitality Employment: Share of Total 2013



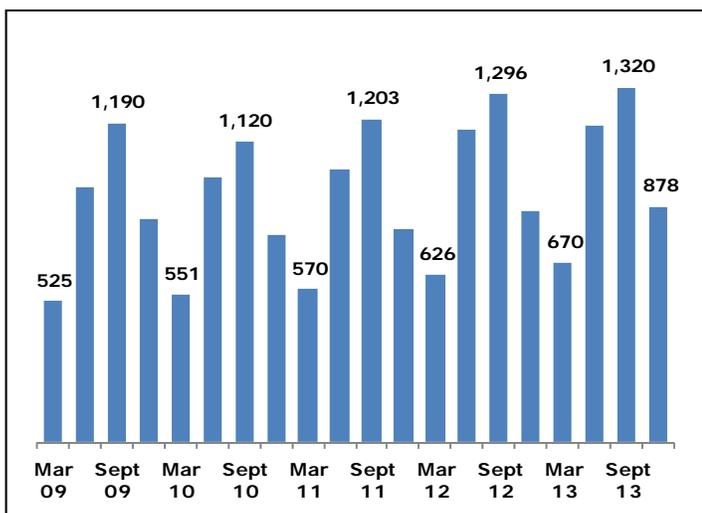
Source: U.S. Bureau of Labor Statistics and Utah Department of Workforce Services

## Year-Over Percent Change in Wages 2012 to 2013



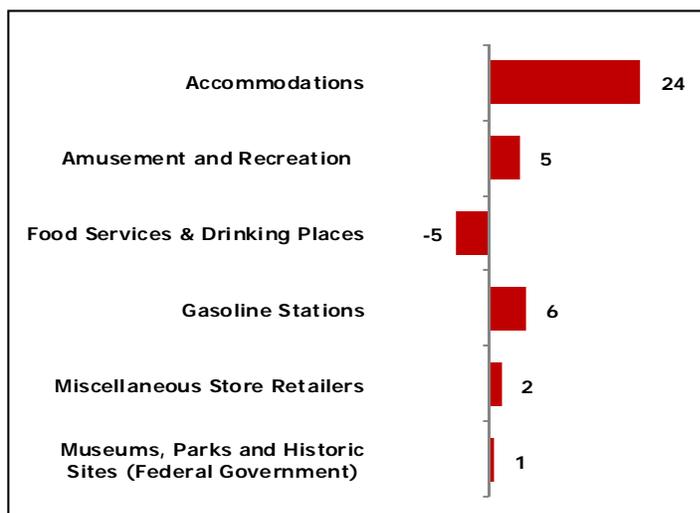
Source: U.S. Bureau of Labor Statistics and Utah Department of Workforce Services

## Private Leisure & Hospitality Jobs by Quarter



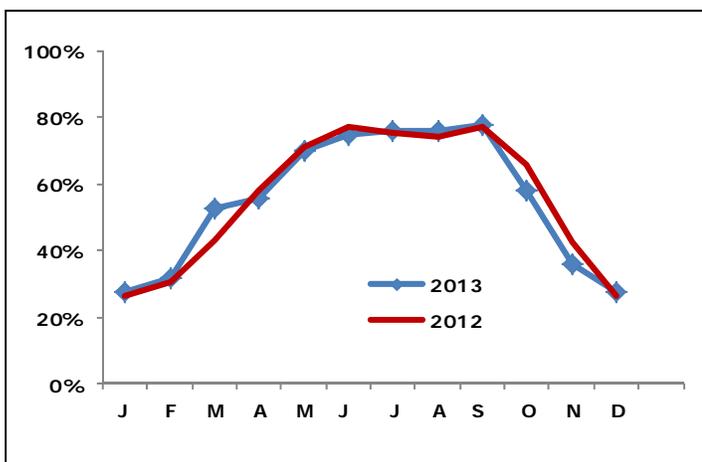
Source: U.S. Bureau of Labor Statistics

## Year-Over Change in Tourism-Related Jobs: 2012-2013



Source: Utah Department of Workforce Services

## Monthly Hotel Occupancy Rates: Kane County

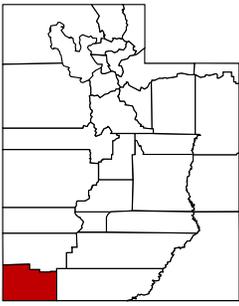


Source: Smith Travel Research

## Accommodations Industry: County vs. State

	Kane County			
	2012	2013	% Change	
Occupancy Rate	57.1%	56.3%	-1.4%	
Average Daily Room Rate	\$81.56	\$83.22	2.0%	
Revenue Per Available Room	\$46.61	\$46.85	0.5%	
	Statewide			
	Occupancy Rate	59.0%	59.1%	0.2%
	Average Daily Room Rate	\$96.84	\$99.45	2.7%
Revenue Per Available Room	\$57.16	\$58.79	2.9%	

Source: Smith Travel Research



# Washington County

**Washington County**, located in the southwestern corner of Utah, had a 17.7% leisure and hospitality<sup>1</sup> job share of total private jobs in 2013, ranking **13th** statewide. Washington County, nicknamed “Dixie” for its warm temperatures and mild winters, has a lot to offer tourists, travelers and recreationists, including shopping, golf courses, access to national and state parks, popular athletic events, outdoor theater, art galleries, spas and resorts. The eastern third of Washington County, which is part of the physiographic Colorado Plateau, includes Zion National Park – Utah’s “crown jewel.” Zion National Park received 2.8 million visitors in 2013 and was ranked the 7th most visited national park in the U.S. The western two-thirds of Washington County include four very diverse and scenic state parks, including Snow Canyon, Sand Hollow, Quail Lake and Gunlock Reservoir State Park. St. George, Washington County’s largest city, is home to the outdoor, sandstone-set Tuacahn Amphitheatre that reportedly attracts over 100,000 attendees from all 50 states and over 20 international countries to its shows. St. George is also the mid-way point between Salt Lake City and Los Angeles along Interstate 15, capturing supplemental visitation from interstate travelers.

Total tourism-related tax revenues increased 11.7% in fiscal year 2013, with a 20.2% increase in resort communities sales tax (Springdale) and over 10% increases in county and municipality transient room tax and restaurant tax. In 2013, leisure and hospitality sector sales, which are highest in the spring and summer months, increased 10.8%. Average annual leisure and hospitality sector jobs increased 8.3% with the foodservice and accommodations sectors adding over 500 combined jobs, as well as significant growth in public and private amusement and recreation jobs. Wages in the leisure and hospitality sector increased 7.8% in 2013, outpacing both statewide and national averages. Since 2010,

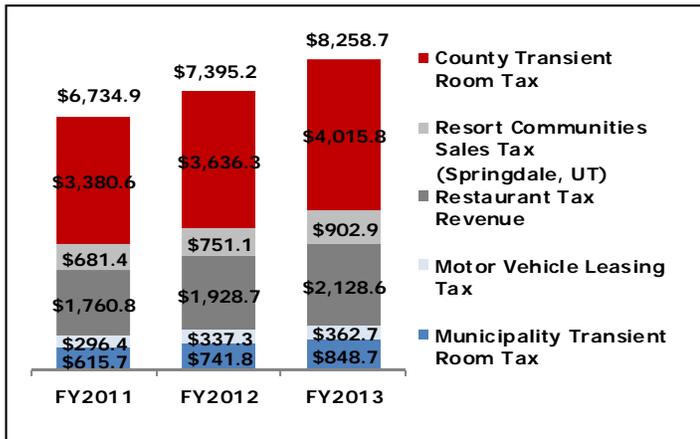
Tourism At-A-Glance			
Statewide Tourism Ranking: <b>13th*</b>			
	2012	2013	% Change
Washington County Population	144,656	147,800	2.2%
Utah Population	2,855,287	2,900,872	1.6%
Tourism-Related Tax Revenues (Fiscal Year; In Thousands)	\$7,395.2	\$8,258.7	11.7%
Leisure & Hospitality Taxable Sales (Calendar Year; In Millions)	\$78.8	\$87.3	10.8%
Leisure & Hospitality Jobs	7,148	7,740	8.3%
Leisure & Hospitality Wages (Millions)	\$110.2	\$118.8	7.8%
Annual Average Occupancy Rate (Washington County)	\$56.7	\$59.3	4.6%
Zion National Park (Annual Recreation Visitation)	2,973,607	2,807,387	-5.6%

\*Based on share of private leisure and hospitality jobs to total private jobs.  
<sup>1</sup>The “Leisure and Hospitality” sector includes NAICS 71 and 72.

the number of fall/winter leisure and hospitality jobs has increased by an average of 11% every spring/summer.

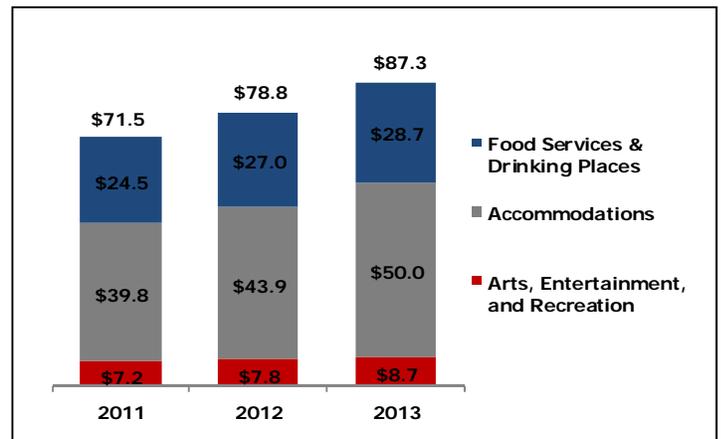
According to Smith Travel Research data, 2012 and 2013 hotel occupancy rates in Washington County were highest from March through October, with a small dip in August. The annual average hotel occupancy rate in Washington County increased 4.6%, the average daily room rate was up 4.3% and revenue per available room grew 8.1% -- all much higher than statewide averages. In 2013, visitation to Zion National Park was down 5.6%, partially due to the government shutdown of national parks in October, 2013. Utah State Parks reported the following recreation visitation to Washington County parks: Snow Canyon State Park (292,402); Sand Hollow State Park (225,668); Quail Creek State Park (58,610); and Gunlock State Park (36,626).

**Tourism-Related Tax Revenue**  
(In Thousands of Dollars)



Source: Utah State Tax Commission

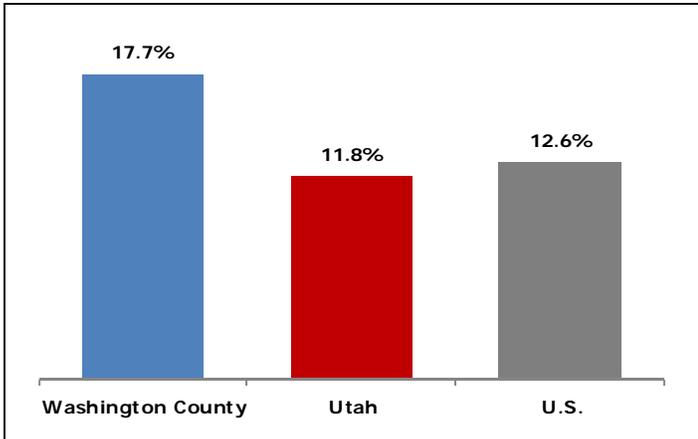
**Gross Leisure & Hospitality Taxable Sales**  
(In Millions of Dollars)



Source: Utah State Tax Commission

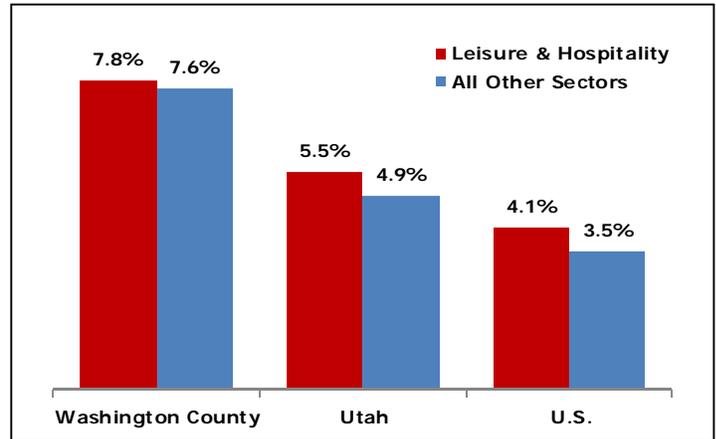
# Utah Travel & Tourism Profile: Washington County

**Private Leisure & Hospitality Employment: Share of Total 2013**



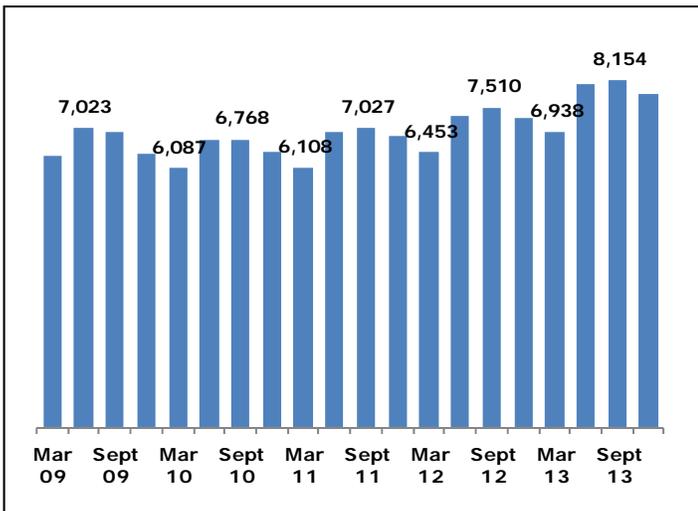
Source: U.S. Bureau of Labor Statistics and Utah Department of Workforce Services

**Year-Over Percent Change in Wages 2012 to 2013**



Source: U.S. Bureau of Labor Statistics and Utah Department of Workforce Services

**Private Leisure & Hospitality Jobs by Quarter**



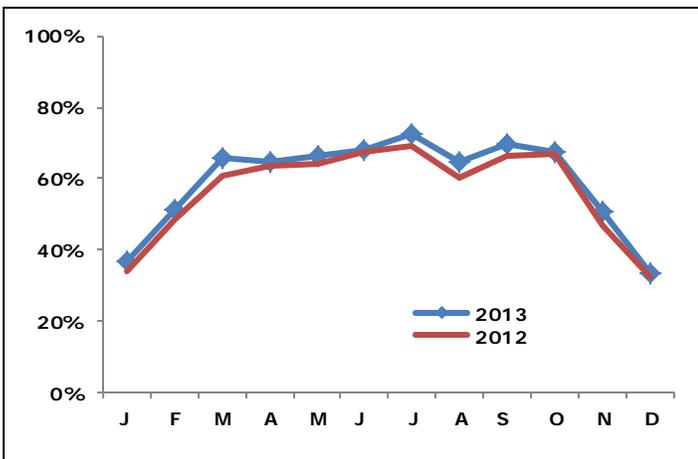
Source: U.S. Bureau of Labor Statistics

**Year-Over Change in Tourism-Related Jobs: 2012-2013**



Source: Utah Department of Workforce Services

**Monthly Hotel Occupancy Rates: Washington**

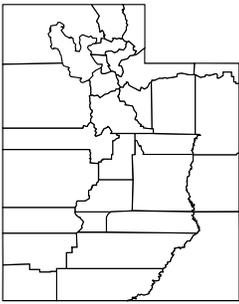


Source: Smith Travel Research

**Accommodations Industry: County vs. State**

Washington County			
	2012	2013	% Change
Occupancy Rate	56.7%	59.3%	4.6%
Average Daily Room Rate	\$80.14	\$83.50	4.2%
Revenue Per Available Room	\$48.05	\$51.92	8.1%
Statewide			
Occupancy Rate	59.0%	59.1%	0.2%
Average Daily Room Rate	\$96.84	\$99.45	2.7%
Revenue Per Available Room	\$57.16	\$58.79	2.9%

Source: Smith Travel Research



# Utah Tourism Rankings by County

County	2011		2012		2013	
	Percent	Ranking	Percent	Ranking	Percent	Ranking
Beaver	27.2%	9	26.1%	9	24.2%	9
Box Elder	9.8%	24	10.1%	24	10.0%	26
Cache	10.1%	23	10.5%	22	10.6%	22
Carbon	10.4%	22	9.9%	25	10.7%	21
Daggett	67.8%	1	71.6%	1	72.4%	1
Davis	12.7%	16	12.8%	15	12.7%	16
Duchesne	6.4%	29	6.3%	29	6.3%	29
Emery	9.1%	28	10.3%	23	10.3%	23
Garfield	56.8%	2	56.8%	2	54.1%	2
Grand	44.1%	3	45.1%	3	45.5%	3
Iron	18.0%	12	18.5%	12	18.5%	12
Juab	11.6%	19	11.1%	20	10.0%	25
Kane	39.9%	5	43.3%	6	43.6%	5
Millard	11.2%	21	10.9%	21	10.9%	20
Morgan	11.9%	18	12.8%	16	12.0%	17
Piute	33.9%	7	34.7%	7	36.2%	7
Rich	32.1%	8	30.4%	8	33.9%	8
Salt Lake	9.6%	25	9.7%	27	9.8%	27
San Juan	19.1%	11	20.5%	11	19.9%	11
Sanpete	16.7%	14	12.6%	18	11.6%	18
Sevier	13.4%	15	13.3%	14	13.1%	15
Summit	43.4%	4	43.4%	5	42.2%	6
Tooele	12.0%	17	12.6%	17	13.6%	14
Uintah	9.4%	26	9.8%	26	10.3%	24
Utah	9.2%	27	9.2%	28	9.1%	28
Wasatch	23.3%	10	21.8%	10	21.1%	10
Washington	17.2%	13	17.3%	13	17.7%	13
Wayne	37.3%	6	43.8%	4	44.8%	4
Weber	11.4%	20	11.6%	19	11.5%	19

Statewide ranking is based on the share of private leisure and hospitality jobs to total private jobs for each county in each calendar year, with #1 representing the county with the largest percent share and #29 representing the county with the smallest percent share.

Source: Utah Department of Workforce Services

# Utah Tourism Profile



STATEWIDE INDICATORS	2008	2009	2010	2011	2012	% Change 2008-2012	% Change 2011-2012
Utah Population (U.S. Census Bureau)	2,663,029	2,723,421	2,774,424	2,814,784	2,854,871	7.2%	1.4%
<b>EMPLOYMENT, SPENDING &amp; WAGES</b>							
<i>(Dollar Amounts Are Millions of Constant 2012 Dollars)</i>							
Estimated Traveler Spending	\$7,275	\$6,589	\$6,831	\$6,984	\$7,405	1.8%	6.0%
Total Private Employment, All Industries <sup>1</sup>	1,021,547	955,196	945,990	968,664	1,006,278	-1.5%	3.9%
Total Private Wages, All Industries <sup>2</sup>	\$40,253	\$38,349	\$38,561	\$39,333	\$41,421	2.9%	5.3%
Total Private Tourism-Oriented Employment	160,029	152,646	151,665	153,619	159,468	-0.4%	3.8%
Total Private Tourism-Oriented Wages	\$2,969	\$2,860	\$2,904	\$2,856	\$2,968	0.0%	3.9%
Tourism-Oriented Share of Total Employment	15.7%	16.0%	16.0%	15.9%	15.8%	1.2%	-0.1%
Total Private Leisure & Hospitality Employment	114,752	110,780	110,553	113,445	118,547	3.3%	4.5%
Total Private Leisure & Hospitality Wages	\$1,873	\$1,815	\$1,841	\$1,860	\$1,951	4.2%	4.9%
Leisure & Hospitality Share of Total Employment	11.2%	11.6%	11.7%	11.7%	11.8%	4.9%	0.6%
Total Leisure & Hospitality Taxable Sales	\$4,886	\$4,580	\$4,772	\$4,978	\$5,253	7.5%	5.5%
<b>UTAH ACCOMMODATIONS INDUSTRY</b>							
<i>(Dollar Amounts Are Constant 2012 Dollars)</i>							
Hotel/Motel Occupancy Rates	59.4%	53.1%	56.1%	57.8%	59.0%	-0.7%	2.1%
Hotel/Motel Average Daily Rate (ADR)	\$100.25	\$93.63	\$92.67	\$95.41	\$97.94	-2.3%	2.7%
Hotel/Motel Revenue Per Available Room (RevPAR)	\$59.51	\$49.72	\$52.02	\$55.13	\$57.81	-2.9%	4.9%
Accommodations Industry Employment	20,460	18,955	19,013	19,557	20,001	-2.2%	2.3%
Accommodations Industry Wages (Millions)	\$405	\$368	\$377	\$386	\$392	-3.2%	1.6%
Accommodations - Taxable Sales	\$1,075	\$933	\$1,034	\$1,148	\$1,215	13.1%	5.8%
<b>TOURISM-RELATED TAX REVENUES</b>							
<i>(Dollar Amounts Are Millions of Constant 2012 Dollars)</i>							
Total TRCC Tax Revenue	\$50.4	\$47.8	\$47.4	\$48.1	\$50.1	-0.6%	4.2%
Total TRT Tax Revenue	\$45.5	\$40.3	\$39.6	\$42.5	\$54.6	20.0%	28.5%
Total Motor Vehicle Leasing Tax Revenue	\$5.2	\$4.0	\$4.3	\$4.5	\$4.6	-13.5%	0.0%
Total ZAP Tax Revenue	\$33.1	\$28.6	\$27.1	\$27.2	\$28.8	-13.0%	5.9%
Total Tourism-Related Tax Revenue	\$134.2	\$120.7	\$118.4	\$122.3	\$138.1	2.9%	12.9%
<b>STATEWIDE VISITATION COUNTS</b>							
Utah Skier Visits	3,972,984	4,048,153	4,223,064	3,826,130	4,031,621	1.5%	5.4%
Total National Park Recreation Visits	5,703,796	6,001,540	6,064,438	6,304,870	6,555,833	14.9%	4.0%
Arches National Park	928,795	996,312	1,014,405	1,040,758	1,070,577	15.3%	2.9%
Bryce Canyon National Park	1,043,321	1,216,377	1,285,492	1,296,000	1,385,352	32.8%	6.9%
Canyonlands National Park	436,715	436,241	435,908	473,773	452,952	3.7%	-4.4%
Capitol Reef National Park	604,811	617,208	662,661	668,834	673,345	11.3%	0.7%
Zion National Park	2,690,154	2,735,402	2,665,972	2,825,505	2,973,607	10.5%	5.2%
Total National Place Recreation Visits <sup>3</sup>	3,111,131	3,123,236	3,299,427	3,385,134	3,402,937	9.4%	0.5%
Total State Park Visits	4,564,770	4,822,847	4,842,918	4,803,770	5,081,558	11.3%	5.8%
Utah Welcome Center Visits	412,158	428,319	447,439	413,196	442,817	7.4%	7.2%
Salt Lake International Airport - Total Passengers	20,790,400	20,432,218	20,901,533	20,389,474	20,102,078	-3.3%	-1.4%
Utah Amtrak Passenger Rail - Total Ridership	38,540	37,906	48,539	48,022	52,856	37.1%	10.1%

Sources: U.S. Census Bureau, D.K. Shifflet & Associates, U.S. Bureau of Labor Statistics, Smith Travel Research, Utah State Tax Commission, Ski Utah, National Park Service, Utah State Parks, Utah Office of Tourism, S.L.C. International Airport, Amtrak.

<sup>1</sup>Employment includes annual average employee full- and part-time private jobs (does not include proprietors).

<sup>2</sup>Wages includes annual average full- and part-time employee wages (does not include proprietors).

<sup>3</sup>Visitation data for Grand Staircase-Escalante NM and Flaming Gorge NRA are not included.

**Strengths, Weaknesses,  
Reparable and Irreparable Barriers,  
Opportunities, and Obstacles**

Many southwestern Utah communities exhibit barriers such as: 1) poor access to markets and supplies; 2) inadequate labor supply; 3) poor labor conditions, rates, or productivity; 4) lack of energy for production; 5) inadequate community facilities including access to advanced technology i.e. high speed Internet; 6) low quality of life or high local taxes. Economic development may not be possible or may be substantially restricted in areas which exhibit such barriers. By taking the first step of identifying barriers and then methodically correcting or eliminating them, a community stands a greater chance of implementing effective community development strategies.

The Five County Economic Development District identified a number of barriers to economic development and classified them into categories related to the significance of the barrier. These barriers have also been divided into categories of correctable and uncorrectable. The presence of too many uncorrectable barriers means that a community cannot expect significant industrial growth, due to the natural forces of economical locations. Correctable barriers should be examined thoroughly and steps taken to lessen or transform the barrier into an advantageous selling point. Regional assets and liabilities have been identified by a number of organizations and the AOG staff.

They are listed below:

**Five County Economic Development District  
Economic Development Assets and Liabilities**

<b>Assets</b>	<b>Liabilities</b>
1. Wage Rates	1. Market Orientation
2. Water and Sewer Costs	2. Clerical Labor Supply
3. Real Estate Tax Costs	3. Lack of Adequate Rail Service
4. Good Interstate Access	4. Fire Protection Rating
5. Proximity to Air Service	5. Telecommunication Capabilities
6. Proximity of Support Services	6. Cultural Opportunities for Executives
7. Good Express Delivery Services	7. Affordable Workforce Housing
8. Recreational Opportunities	

## Correctable and Uncorrectable Barriers to Economic Development

Correctable	Uncorrectable
<b>Major</b> Lack of Skilled Labor (especially high tech) Financial Capabilities Market Exposure Available industrial buildings Environmental Constraints	Restrictions concerning heavy and/or polluting industries
<b>Significant</b> Lag time required to train unskilled labor Railroad access (long-term) Expense of further site development Availability of inexpensive, sound housing Fire Protection ratings	Railroad access Highway access
<b>Minor</b> Quantity of available labor Lack of equipment and facilities for vocational training Commuter Air Service Regional Image (rural) Lack of Support Industry Community Recreation	Some community members want their communities to remain as they are (rural) Interstate –Inter-regional access to materials

## B. REGIONAL PARTNERSHIPS

### Important Partnerships

Successful regional economic development will not occur in a vacuum. The staff of the EDD recognizes the vital importance of coordinating with other public and private sector organizations and individuals that influence regional economic health. The district has forged successful relationships with a number of such organizations.

Local Economic Development Professionals have been employed by Beaver, Garfield, Iron and Washington counties. The EDD staff works closely with these professionals in their marketing and other activities. A number of communities have engaged in local Main Street projects. Some have employed Main Street Coordinators, who also act as economic development agents at the local level. The EDD staff provides technical assistance, primarily in grant writing and project financing. Another area of regional assistance has been focused on tourism promotion. The Association of Governments contracted with the Scenic Byway 12 Steering Committee to prepare a Scenic Byway 12 Corridor Management Plan in preparation for application to designate the Garfield County highway as a National All American Road. That designation as Utah's first All American Road was awarded in June 2002. The staff has also authored a Corridor Management Plan for Scenic Byway 143 and will assist in submitting an application for federal designation in 2008. A group of community leaders in the Zion Canyon region is beginning a corridor management process along state route 9, which traverses Zion National Park.

Local Chambers of Commerce have included the Association of Governments as an *ex officio* member, and invite association staff to participate in chamber events. The regional Revolving Loan Fund has been featured in a number of chamber presentations.

A primary source of both financial and technical support of regional economic development efforts is the Governor's Office of Economic Development. The Community Development Division administers the Community Development Block Grant program, as well as other housing and community development programs. The Governor's Office of Economic Development is the primary generator of business leads and active state-level economic assistance programs such as the Industrial Assistance Fund and state Enterprise Zones.

Utah Small Business Development Centers have offices located at Southern Utah University in Cedar City and Dixie State University in St. George. The SBDC mission is to help small businesses manage more effectively through access to business information and improving business skills. The local SBDC offices are the primary source of assistance to business owners who need help in preparing loan applications and business plans.

Color Country Resource Conservation & Development (RC&D) is a USDA-sponsored organization devoted to fostering the well-being of rural communities in southwestern Utah. The RC&D is a registered 501(c)(3) not-for-profit organization that can help locate private sector foundation funding. This organization is dormant and is being reviewed by the Washington County attorney's office to reorganize and amend the bylaws and function again.

### **Coordination with State Economic Development**

Governor's 2012 economic development plan and revitalization of Utah:

The plan to revitalize Utah's economic base centers on creating an environment that will allow Utah to attract and retain good businesses. In order to do this, and if businesses are going to choose to locate or remain in the area, the state's tax and policy environment must be more appealing. If Utah is successful in attracting and retaining good businesses, then job growth and long-term economic prosperity will naturally follow.

In contemplating the future, perhaps most striking will be population growth, which in the coming generations will be a constant companion. Utah families alone will account for two thirds of population growth, which already is running at twice the national average. Meanwhile, immigrants from other states and countries will continue to see Utah as a land of opportunity.

The economy will require consistent nurturing and fine-tuning so it is able to deliver reliable growth and prosperity for the expanding population. With most states in America worried about economic growth, the next few years will likely see unprecedented competition to attract or develop economic success. With this increased competition, issues like quality of life, education, reliable water resources and workforce availability and productivity will be ever important variables for success. Unparalleled human and natural resources should position the area well for the challenges of the next half century, but the citizenry must also be good stewards of these resources.

Government should not be in the job creating business, but a concerted effort can improve the environment in which the state's private sector competes. Identified below are ten strategic initiatives that, when implemented in a timely, effective, and coordinated manner, will dramatically strengthen Utah's economy:

1. Reduce the tax burden on Utah's employers and spur new hiring by reducing the unemployment insurance rate.
2. Assist the growth of companies in rural Utah by extending the Business Expansion and Retention Program to all rural counties.
3. Double exports over the next five years by increasing outreach and technical assistance to Utah companies to expand international markets.
4. Align public sector job training and placement efforts with private sector demands and workforce needs.
5. Increase the number of Utah start-up companies by improving access to seed funding.
6. Develop a world-class, one-stop-shop for business resources by revamping the structure, collaboration and service delivery statewide.
7. Continue to recruit new companies to the state and market Utah as the "best place for business."
8. Ensure a vibrant business environment and maintain Utah's AAA bond-rating through continuous regulatory reform and fiscally prudent management of state government.

The Governor's Office of Economic Development (GOED) structured a series of activities designed to accomplish the Governor's ten strategic initiatives. These activities are:

### **Business and Technology Parks**

The Business & Technology Parks Program's primary goal is to partner with industry to develop business and technology parks to facilitate technology commercialization, business expansion, and business recruitment.

### **Centers of Excellence**

The Centers of Excellence Program is a program that helps to fund the process of moving the most innovative research from Utah's universities into businesses to create great Utah jobs. The program helps each Center develop a sound business plan and develop relationships with seasoned business people and potential licensees (existing businesses) that are interested in the market potential of the specific technology. These technology areas include the life sciences (biomedical and biotechnology), information technology and electronics, agriculture, environment and natural resources and aerospace and advanced materials and processes.

### **Clusters**

Utah's Economic Cluster Initiative is designed around proven economic principles where collaboration among organizations offers sustainable advantages to local economies. Based on best practices and successful economic models, Utah is capitalizing on its core strengths and facilitating the development of clustered business environments where these strengths will result in a thriving economy and an increased standard of living. For example, the Aerospace industry will find greater success in the district with the addition of the St. George Regional Airport, and the planned Cedar City expansion of the runway for aerospace manufacturing. Salt Lake City a major international hub announced that by 2020 the airport will invest 1.8 billion to rebuild the airport to accommodate industry growth.

### **Housing – Affordable/Workforce**

The Five County Association of Governments Planning Staff is actively involved with assisting communities in the region develop moderate-income or affordable housing plans as required by Utah State Code 10-9a-402. The purpose of the affordable housing plan is to provide a framework

for cities to provide a reasonable opportunity for the population desiring to live in each community. Each plan includes an analysis that forecasts gaps and needs for housing which is affordable to various income groups. This demand is based upon current housing values, income ranges of the current population, and population growth projections. Plans include goals and strategies which each city plans to implement to address the need for affordable housing. Specific strategies include such actions as removing regulatory barriers to constructing affordable housing, promoting housing assistance programs, and re-structuring impact fees. Since 2011, FCAOG has helped develop affordable housing plans for 14 cities in the region.

In addition to providing staff support to develop affordable housing plans, FCAOG staff provides information about affordable and workforce housing resources and events in the area. FCAOG manages the website, <http://www.southernutahhousing.com/>, which provides information about programs, news, initiatives and tools related to affordable workforce housing pertinent to the region. Staff also produces a quarterly housing newsletter, distributed to local officials in the region, which highlights regional, state and national news and events related to workforce and affordable housing.

### **International Development**

The International Trade and Diplomacy Office (ITDO) assist's companies in developing markets for their products and services in other countries. ITDO helps Utah companies understand the benefits of expanding into international markets and provides assistance securing international business connections. It also helps companies as they master the process of exporting goods and services. Through increasing international trade and branding Utah globally, ITDO helps grow Utah's economy, create jobs and increase Utah's international presence.

### **National Scenic Byway Planning**

The Five County Association of Governments Planning Staff has been engaged as a consultant for three National Scenic Byway corridor management plan development processes. The first one resulted in "Scenic Highway 12" (State Route 12), one of the most scenic highways in America, receiving the designation of 'All American Road' in 2002.

Scenic Byway 12 was followed up by the development of a corridor management plan developed by the Association staff for "Utah's Patchwork Parkway" (State Route 143) which received National Scenic Byway designation in 2009. Utah's Patchwork Parkway name comes from the Quilt Walk Story of 1864. The first Mormon settlers arrived in Panguitch March of 1864 to colonize the area. They immediately set about to raise crops, not realizing that their high mountain altitude and weather limited their growing season which did not allow the crops to mature that first year. Facing the possibility of starvation their first winter, seven men left Panguitch in a snow storm and headed for Parowan. They reached the base of the mountain and were soon bogged down in snow. After kneeling down to pray on quilts from the wagon, the men realized that they had not sunk down in the snow. So they began to lay down one quilt walk across, lay down another quilt, and so forth until they arrived in Parowan. After getting 50-pound sacks of flour and other supplies, the men repeated the process back to their wagon and back to Panguitch.

The third scenic byway corridor management plan developed with and on behalf of local jurisdictions was the Zion Canyon Scenic Byway (this is the portion of State Route 9 between the junction of State Route 17 and the east entrance to Zion National Park. This is the primary gateway corridor to Zion National Park and offers not only spectacular scenic vistas, but also provide glimpse into Mormon town settlements, examples of early ranching and farming, and historic homes and buildings along the route. This byway's corridor management plan was completed in

2010, was adopted by the local governments and then approved by a joint resolution of the Utah Legislature in early 2011. Utah Code Section 72-4-301.5 states that “a highway or state scenic byway may not be nominated for designation as a National Scenic Byway or All-American Road unless the corridor management plan that will be submitted with the application for the highway or state scenic byway to be nominated for designation as a National Scenic Byway or All-American Road is approved by the Legislature”. The proponents of the scenic byway are awaiting an opportunity to submit an application/nomination to the Federal Highways Administration for designation as a National Scenic Byway.

Meanwhile, implementation of the scenic byway plans is underway by both the Highway 12 and the Utah’s Patchwork Parkway committees. Interpretive plans have been developed for both byways and special signage and kiosks have been and are being constructed along these two byways. Not to be left behind, and even in the absence of a national byway designation, the Zion Canyon Corridor Council (ZC3) has already awarded a contract to a private planning firm to develop an interpretive plan for the Zion Canyon Scenic Byway.

The net effect of these nationally recognized scenic byways is increasing the number of tourist visits as well as increasing the amount of time those tourists stay in Utah, creating additional needed economic impact to the rural communities in southwest Utah.

The Five County Association of Governments Community and Economic Development staff has developed a solid reputation of excellence in the development of the detailed corridor management plans necessary for the byway supporters to apply for national designation.

### **Pioneer Communities/Main Street**

With the understanding that a healthy, vibrant community builds its future on its past, the Pioneer Communities/Main Street Program works with communities throughout Utah to restore the physical and economic vitality of their historic business districts.

### **Procurement Assistance**

The Utah Procurement Technical Assistance Center (UPTAC) was established to provide the information and assistance needed to sell products and/or services to federal, state and local governments.

### **Recruitment and Incentives**

Nine incentive programs are available to assist private sector entities locate or expand in Utah.

### **Rural Development**

The Rural Development office promotes initiatives that provide a positive business environment for rural entrepreneurs. Staff provides support to the Governor’s Rural Partnership Board who’s Rural Action Agenda addresses issues impacting rural Utah’s entrepreneurial environment such as health insurance, capital formation and rural economic development clusters.

### **Talent Access**

This program assists small and mid-sized companies with talent focused tools, resources and education programs that empower Utah companies to successfully recruit key talent essential to their growth, expansion and profitability.

*Economic analysis in the district and population data:*

## **C. BEAVER COUNTY**

### **Background**

Beaver County is situated approximately halfway between Salt Lake City, Utah, and Las Vegas, Nevada. It is within the “Grand Circle” of scenic and recreation areas extending from Utah into Colorado, New Mexico, and Arizona. Interstate Highway I-15 passes through the eastern part of the county at Beaver City and is the main traffic route north to Salt Lake City and south to Las Vegas, as well as to major destinations in between.

Recreation in the region is increasing, with growing numbers of tourists attracted to the area’s national parks and recreation areas. Beaver County hosts many travelers for short periods as they pass through to the major attractions of the region. The county itself is also a destination for thousands of hunters, fishermen, hikers, bikers, ATVs, and campers looking for a high country outdoor experience. A major attraction in Beaver County is Elk Meadows Ski and Summer Resort, located just eighteen miles east of Beaver.

The first settlers in Beaver County came from Parowan in April 1856. They built log cabins along Beaver River and began cultivation in the same area. The first town was laid out in the spring of 1858, and, as with the river, was named for the many beaver dams found there. The County of Beaver was created in 1886 by an act of the Legislature of the Territory of Utah. The history of Beaver County is filled with the names of illustrious people. Philo T. Farnsworth, who pioneered television research, was born in Beaver County. Senator Abe Murdock is the only U.S. legislator ever elected from southern Utah. Butch Cassidy was born in Beaver but moved to Circleville while still young.

Until recent times, the three main sources of income for the county have been agriculture, mining, and the railroad. Agriculture includes high quality grazing land, a variety of crops that are either consumed locally or transported to other areas, and a sizeable dairy industry.

The county is 90 miles in length from east to west and 30 miles wide from north to south, with an area of 2,568 square miles. It is crossed by a number of short mountain ranges, the highest being the Tushar Mountains in the east, with peaks over 12,000 feet high. The Beaver River originates in this area and flows in a westerly and north-westerly direction, disappearing into Millard County at the southern end of the Great Basin drainage area. The elevation of Beaver Valley in the east is 5,970 feet, while the elevation of Milford Valley in the west is 4,962 feet.

# ECONOMIC SNAPSHOT

## Beaver County



Utah Department of Workforce Services

### Year-to-Year Change in Nonfarm Jobs

MARCH 2014\*

↑ 16

0.7%

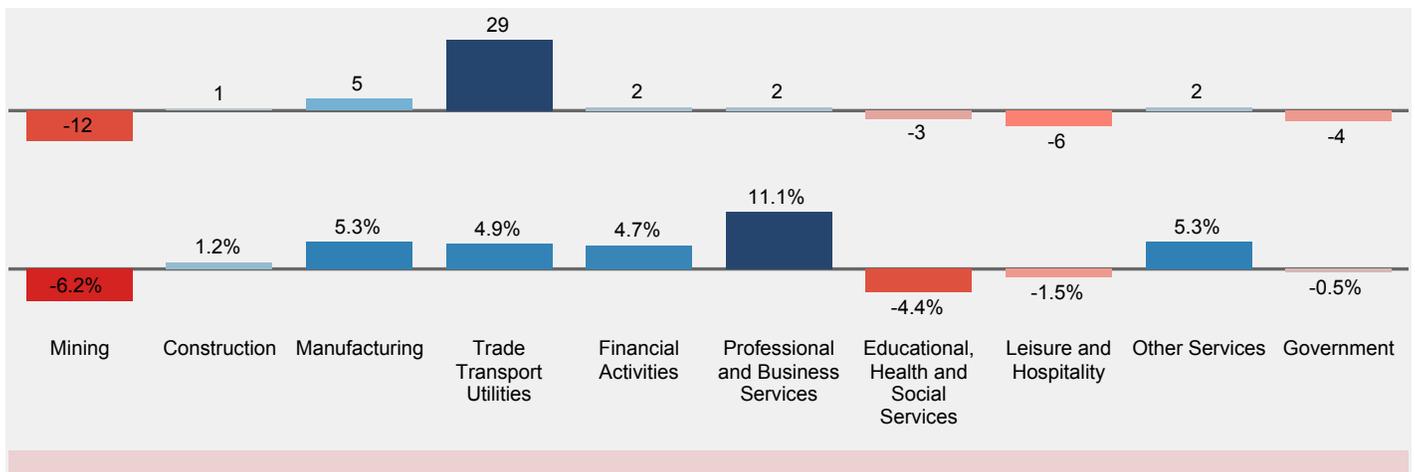
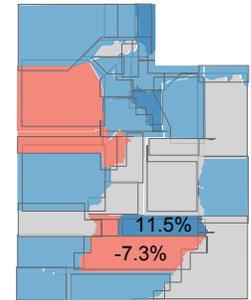
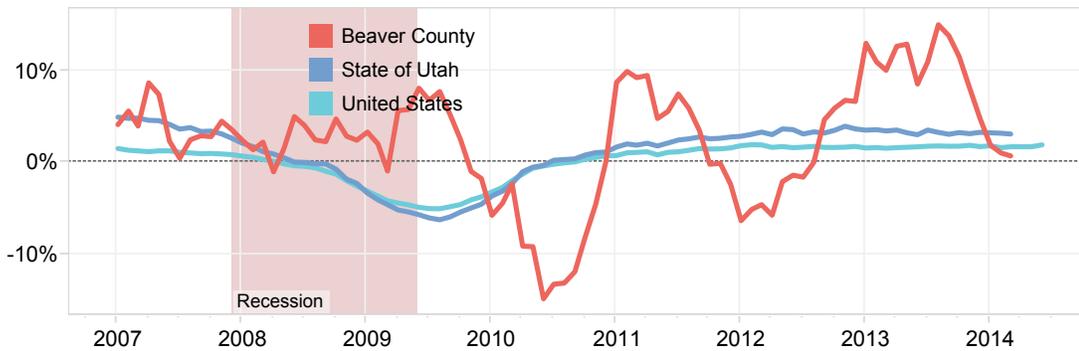
Beaver County

3.1%

State of Utah

1.7%

United States



### Seasonally Adjusted Unemployment Rates

JUNE 2014\*

3.3%

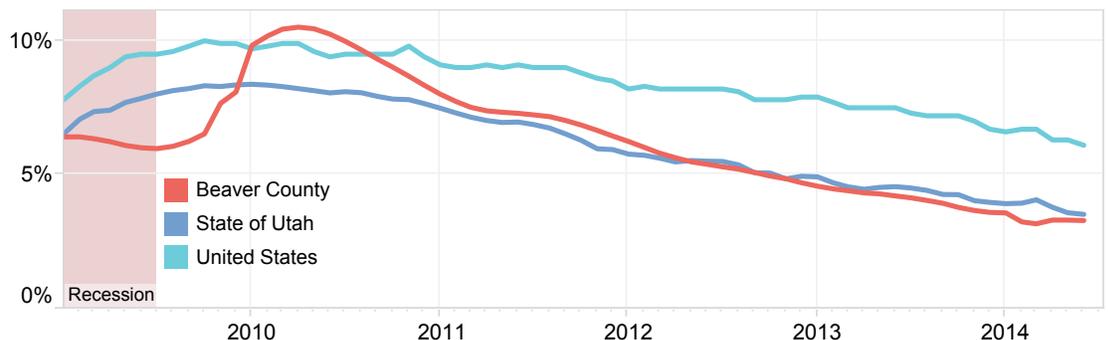
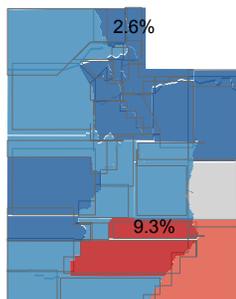
Beaver County

3.5%

State of Utah

6.1%

United States



\*Preliminary Updated 7/22/2014.  
Source: U.S. Bureau of Labor Statistics; Utah Department of Workforce Services.

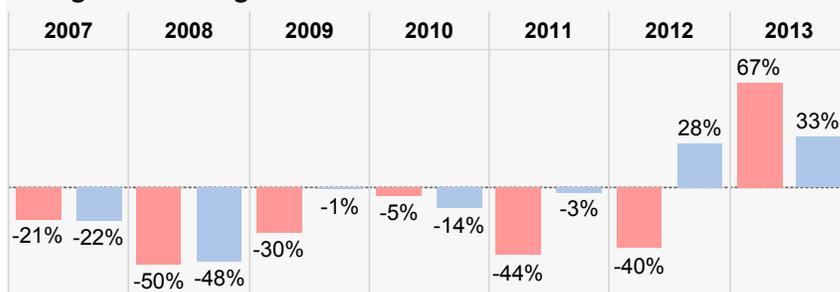


## Construction Permitting ANNUAL 2013

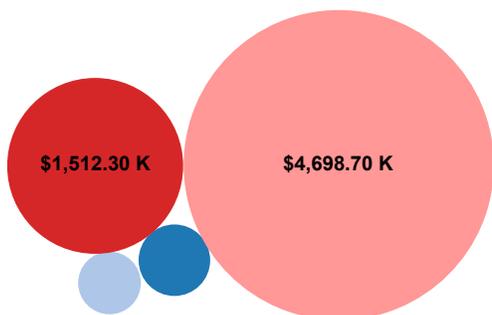
### Dwelling Unit Permits



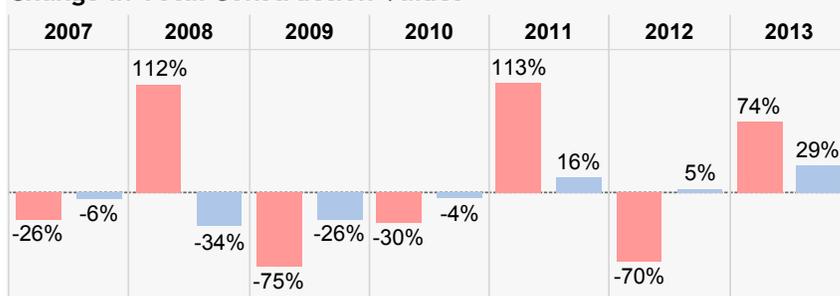
### Change in Dwelling Units



### Annual Values



### Change In Total Construction Values

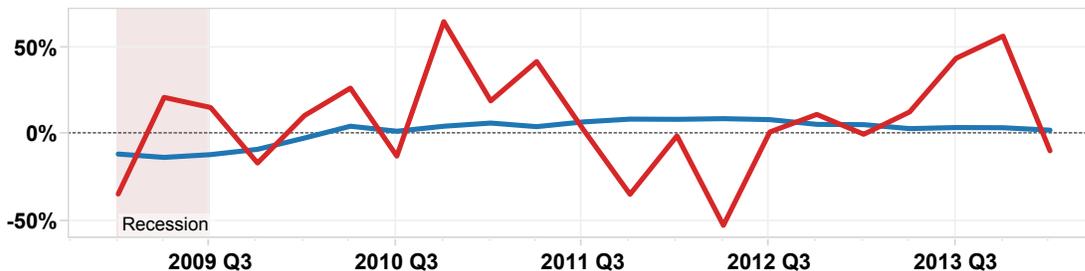
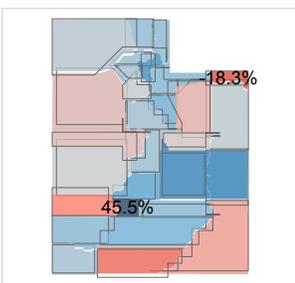


## Year-Over Change In Gross Taxable Sales

First Quarter 2014

Beaver County  
\$ -9.7%

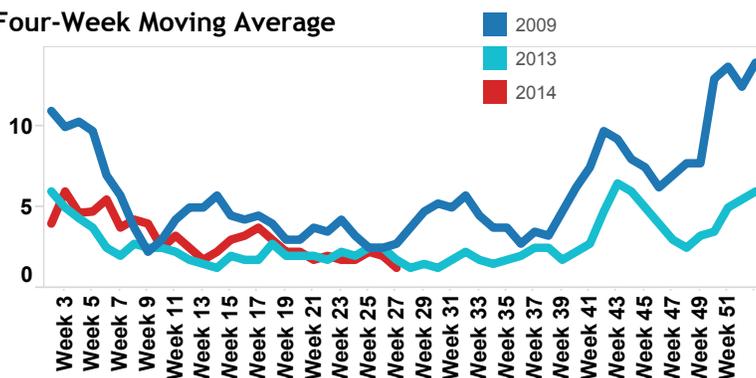
State of Utah  
\$ 2.2%



## Initial Claims for Unemployment Insurance

YTD July 5, 2014

### Four-Week Moving Average



# Nonfarm Employment

## Beaver County

First Quarter 2014

	January				February				March			
	2013		Change 2013 - 2014		2013		Change 2013 - 2014		2013		Change 2013 - 2014	
	2013	2014(p)	Percent	Numeric	2013	2014(p)	Percent	Numeric	2013	2014(p)	Percent	Numeric
<b>Total Nonfarm Employment</b>	2,213	2,254	1.9%	41	2,252	2,275	1.0%	23	2,271	2,287	0.7%	16
<b>Goods Production</b>	356	362	1.7%	6	362	366	1.1%	4	371	365	-1.6%	-6
Mining	189	181	-4.2%	-8	189	181	-4.2%	-8	194	182	-6.2%	-12
Construction	83	80	-3.6%	-3	80	84	5.0%	4	82	83	1.2%	1
Manufacturing	84	101	20.2%	17	93	101	8.6%	8	95	100	5.3%	5
<b>Service Production</b>	1,857	1,892	1.9%	35	1,890	1,909	1.0%	19	1,900	1,922	1.2%	22
Trade, Transportation, and Utilities	576	591	2.6%	15	578	602	4.2%	24	589	618	4.9%	29
Wholesale Trade	22	25	13.6%	3	29	26	-10.3%	-3	32	31	-3.1%	-1
Retail Trade	326	342	4.9%	16	321	343	6.9%	22	330	349	5.8%	19
Transportation and Warehousing	183	178	-2.7%	-5	182	186	2.2%	4	175	190	8.6%	15
Utilities	45	46	2.2%	1	46	47	2.2%	1	52	48	-7.7%	-4
Information	0	0	0.0%	0	0	0	0.0%	0	0	0	0.0%	0
Financial Activities	43	43	0.0%	0	44	42	-4.5%	-2	43	45	4.7%	2
Finance and Insurance	d	d		d	d	d		d	d	d		d
Real Estate & Rental and Leasing	d	d		d	d	d		d	d	d		d
Professional and Business Services	15	17	13.3%	2	18	19	5.6%	1	18	20	11.1%	2
Professional/Sci/Technical Svcs	11	12	9.1%	1	12	14	16.7%	2	12	14	16.7%	2
Management of Companies	0	0		0	0	0		0	0	0		0
Admin Support/Waste Mgmt	4	5	25.0%	1	6	5	-16.7%	-1	6	6	0.0%	0
Educational, Health, Social Svcs	67	63	-6.0%	-4	68	66	-2.9%	-2	68	65	-4.4%	-3
Educational Services	0	0		0	0	0		0	0	0		0
Health Care and Social Services	67	63	-6.0%	-4	68	66	-2.9%	-2	68	65	-4.4%	-3
Leisure and Hospitality	399	403	1.0%	4	393	392	-0.3%	-1	393	387	-1.5%	-6
Arts, Entertainment, Recreation	d	d		d	d	d		d	d	d		d
Accommodation & Food Svcs	d	d		d	d	d		d	d	d		d
Other Services	36	38	5.6%	2	36	38	5.6%	2	38	40	5.3%	2
Government	721	737	2.2%	16	753	750	-0.4%	-3	751	747	-0.5%	-4
Federal	32	37	15.6%	5	36	34	-5.6%	-2	36	35	-2.8%	-1
State	40	40	0.0%	0	40	40	0.0%	0	40	40	0.0%	0
Local	649	660	1.7%	11	677	676	-0.1%	-1	675	672	-0.4%	-3
Covered Ag, Forestry, Fishing, Hunting*	515	505	-1.9%	-10	517	513	-0.8%	-4	516	503	-2.5%	-13

\* Employment "covered" under the Employment Security Act. Includes some, but not all, agriculture. Excludes most self-employed. Not included in total employment.

Note: Detail may not add to total due to rounding.

p = Preliminary, d = Not shown to avoid disclosure of individual firm data

Source: Utah Department of Workforce Services.

Last updated 8/19/2014 2:58:28 PM

## **D. GARFIELD COUNTY**

### **Background**

Garfield County is located in the south central section of Utah. It lies approximately 36 miles north of the Utah-Arizona line and 370 miles south of the Utah-Idaho line. The main highway running north and south through the county is U.S. Highway 89. Scenic Byway 12 runs east and west through the county. This county is famous for many national and state parks: Bryce Canyon NP, Capitol Reef NP, Calf Creek SP, Escalante Canyons SP, Anasazi Village SP, Petrified Forest SP, and Kodachrome Basin SP to name a few. Because of this most of the land in Garfield County is publicly owned. The fifth largest county in the state of Utah, Garfield County has an area of 3,338,880 acres and is approximately 150 miles from east to west and 43 miles from north to south. Only four percent of Garfield County is private land. The population is about 5,000. The average temperature in January is 24°F and the average temperature in July is 66°F. The average annual precipitation in the county is 10.3 inches.

Garfield County depends more on tourism and recreation for employment than any other county in Utah. With Bryce Canyon, Lake Powell, state parks, and scenic beauties, the county attracts many, many visitors each year. Garfield County exhibits one of the highest unemployment rates in the state due to the seasonal nature of the tourist economy. Almost 40 percent of Garfield County's nonfarm employment can be categorized in the leisure and hospitality industry, in vivid contrast to the statewide figure of only nine percent.

# ECONOMIC SNAPSHOT

## Garfield County



Utah Department of Workforce Services

### Year-to-Year Change in Nonfarm Jobs

MARCH 2014\*

↓ -138

-7.3%

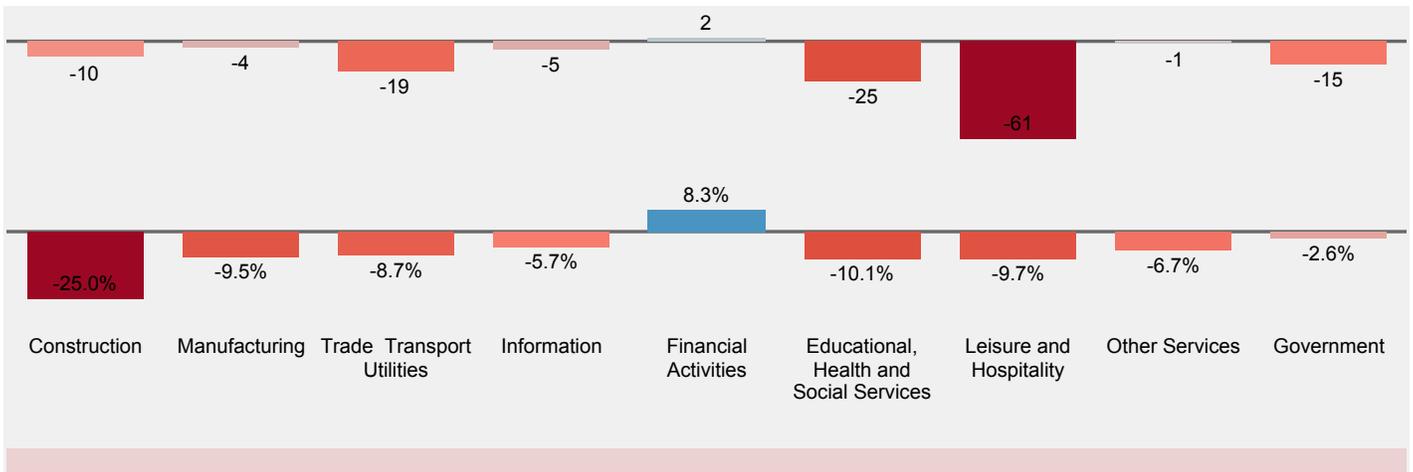
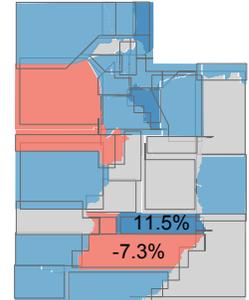
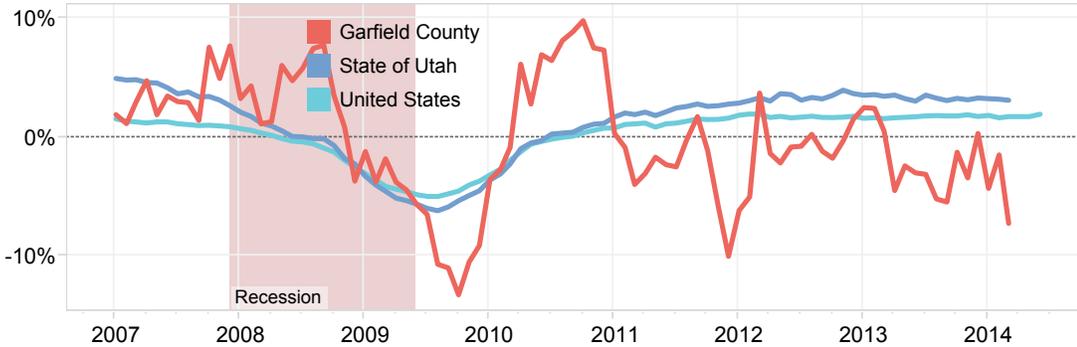
Garfield County

3.1%

State of Utah

1.7%

United States



### Seasonally Adjusted Unemployment Rates

JUNE 2014\*

8.0%

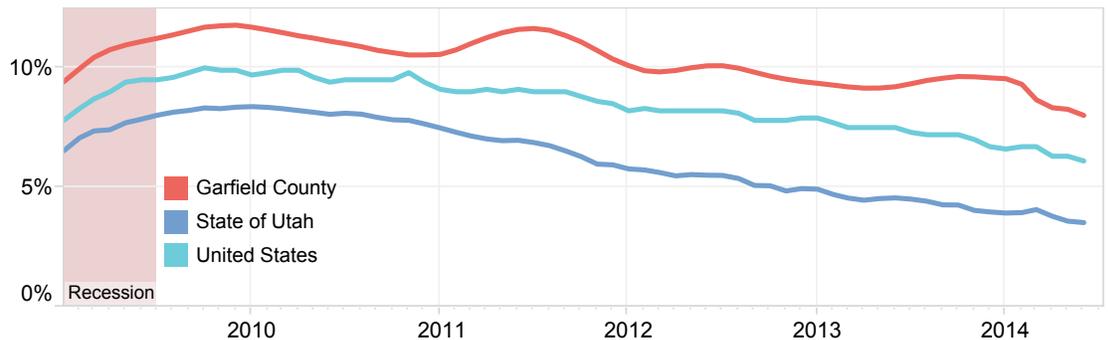
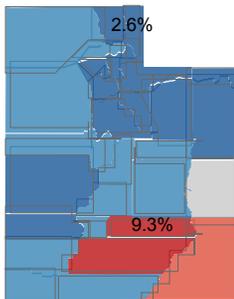
Garfield County

3.5%

State of Utah

6.1%

United States



\*Preliminary Updated 7/22/2014.  
Source: U.S. Bureau of Labor Statistics; Utah Department of Workforce Services.

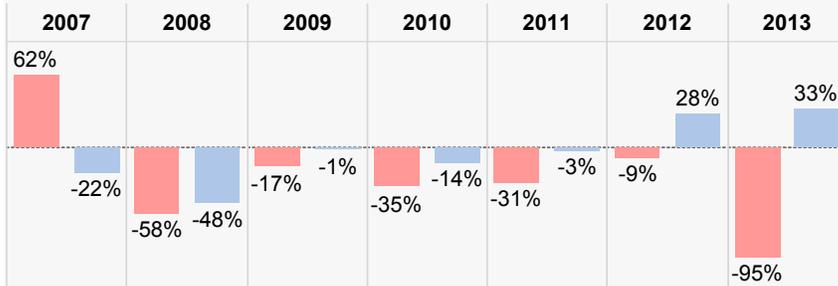


## Construction Permitting ANNUAL 2013

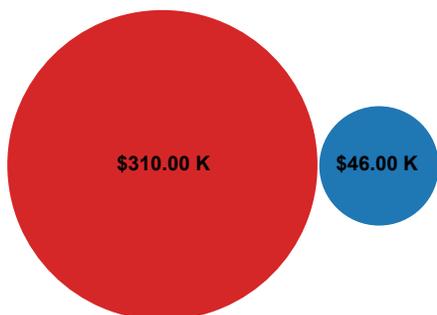
### Dwelling Unit Permits



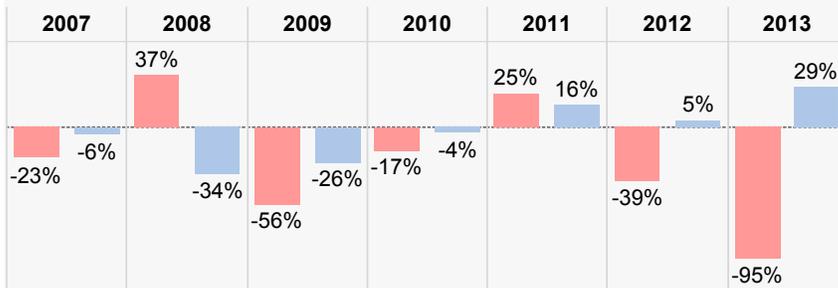
### Change in Dwelling Units



### Annual Values

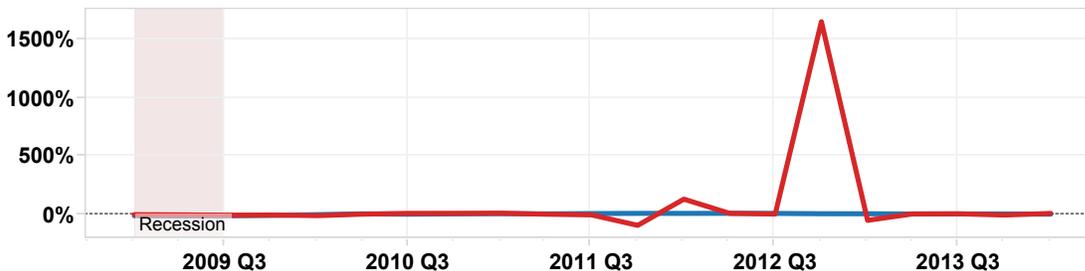
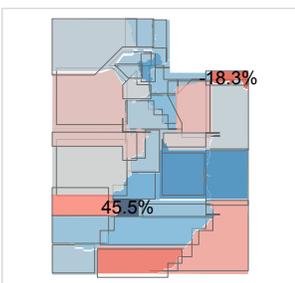


### Change In Total Construction Values



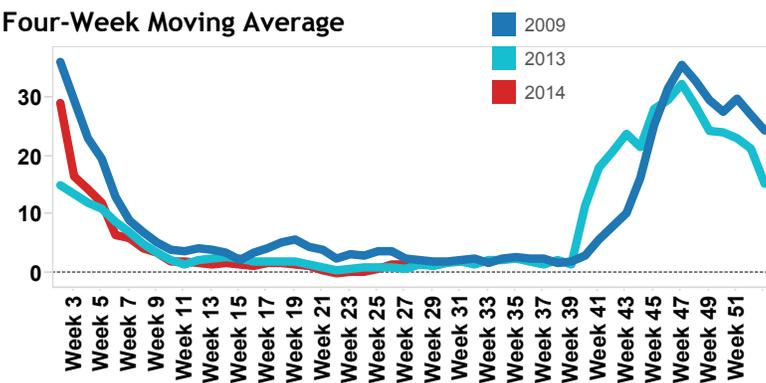
## Year-Over Change In Gross Taxable Sales First Quarter 2014

Garfield County: \$ 8.4%  
State of Utah: \$ 2.2%



## Initial Claims for Unemployment Insurance YTD July 5, 2014

### Four-Week Moving Average



Source: Utah Dept. of Workforce Services, Utah Bureau of Economic and Business Research, Utah State Tax Commission.

# Nonfarm Employment

## Garfield County

First Quarter 2014

	January			February			March					
	Change 2013 - 2014		2013	Change 2013 - 2014		2013	Change 2013 - 2014		2013	Change 2013 - 2014		
	2014(p)	Percent		2014(p)	Percent		2014(p)	Percent		2014(p)	Percent	Numeric
<b>Total Nonfarm Employment</b>	1,708	1,634	-4.3%	-74	1,713	1,687	-1.5%	-26	1,898	1,760	-7.3%	-138
<b>Goods Production</b>	89	81	-9.0%	-8	88	83	-5.7%	-5	91	77	-15.4%	-14
Mining	d	d			d	d			d	d		
Construction	d	d			d	d			d	d		
Manufacturing	44	35	-20.5%	-9	43	38	-11.6%	-5	42	38	-9.5%	-4
<b>Service Production</b>	1,619	1,553	-4.1%	-66	1,625	1,604	-1.3%	-21	1,807	1,683	-6.9%	-124
Trade, Transportation, and Utilities	219	195	-11.0%	-24	205	198	-3.4%	-7	219	200	-8.7%	-19
Wholesale Trade	d	d			d	d			d	d		
Retail Trade	162	151	-6.8%	-11	145	150	3.4%	5	160	154	-3.8%	-6
Transportation and Warehousing	d	d			d	d			d	d		
Utilities	26	28	7.7%	2	27	27	0.0%	0	28	28	0.0%	0
Information	78	84	10.3%	6	82	84	2.4%	2	88	83	-5.7%	-5
Financial Activities	24	27	12.5%	3	24	27	12.5%	3	24	26	8.3%	2
Finance and Insurance	d	d			d	d			d	d		
Real Estate and Rental and Leasing	d	d			d	d			d	d		
Professional and Business Services	18	22	22.2%	4	17	19	11.8%	2	18	18	0.0%	0
Professional/Sci/Technical Svcs	10	11	10.0%	1	10	11	10.0%	1	11	11	0.0%	0
Management of Companies	0	0		0	0	0		0	0	0		0
Admin Support/Waste Mgmt	8	11	37.5%	3	7	8	14.3%	1	7	7	0.0%	0
Educational, Health, Social Svcs	234	229	-2.1%	-5	242	232	-4.1%	-10	247	222	-10.1%	-25
Educational Services	3	2	-33.3%	-1	3	3	0.0%	0	3	3	0.0%	0
Health Care and Social Services	231	227	-1.7%	-4	239	229	-4.2%	-10	244	219	-10.2%	-25
Leisure and Hospitality	475	444	-6.5%	-31	479	488	1.9%	9	628	567	-9.7%	-61
Arts, Entertainment, Recreation	23	23	0.0%	0	25	18	-28.0%	-7	27	26	-3.7%	-1
Accommodation & Food Svcs	452	421	-6.9%	-31	454	470	3.5%	16	601	541	-10.0%	-60
Other Services	11	14	27.3%	3	12	12	0.0%	0	15	14	-6.7%	-1
Government	560	538	-3.9%	-22	564	544	-3.5%	-20	568	553	-2.6%	-15
Federal	134	127	-5.2%	-7	132	122	-7.6%	-10	136	131	-3.7%	-5
State	73	73	0.0%	0	73	73	0.0%	0	73	73	0.0%	0
Local	353	338	-4.2%	-15	359	349	-2.8%	-10	359	349	-2.8%	-10
Covered Ag, Forestry, Fishing, Hunting*	27	28	3.7%	1	28	25	-10.7%	-3	30	27	-10.0%	-3

\* Employment "covered" under the Employment Security Act. Includes some, but not all, agriculture. Excludes most self-employed. Not included in total employment.

Note: Detail may not add to total due to rounding.

p = Preliminary, d = Not shown to avoid disclosure of individual firm data

Source: Utah Department of Workforce Services.

Last updated 8/19/2014 3:00:29 PM

## **E. IRON COUNTY**

### **Background**

Iron County is located in the southwestern portion of Utah and is comprised of approximately 2,110,720 acres. Seventy-seven percent of the county is public or urban lands. Most federal public land is administered by the United States Forest Service or the Bureau of Land Management. Much of the state land is administered by the School and Institutional Trust Lands Administration and the Utah Division of Wildlife Resources. Major land uses in the county include range, alfalfa and grass hay, corn and small grain crops, hog production facilities, forest production, and industrial and urban uses. Recreational uses are also common activities, both on private and public lands. Elevation and land cover are diverse within the county.

Elevations in the county range from over 11,000 feet in the Markagunt Plateau on the east side of the county to 5,000 feet in the Escalante Desert. The county is surrounded by four mountain ranges, which drain into the Escalante Desert. Because of the various elevations in the county, precipitation, land cover, and land use vary. The higher elevations support subalpine meadows, conifer, and aspen forests. The average precipitation in these locations is 25 to 40 inches. Middle elevations support mixed forest communities, mountain shrub lands, and pinion/juniper forests, and the annual precipitation is from 15 to 25 inches. The lower elevations are semi-desert and salt desert rangelands, and they receive 8 to 15 inches of annual precipitation. Cropland and irrigated pastures are found in the lower elevations. In 2009, the total population in Iron County was 46,825 individuals. The median family income from 2006-2008 was \$46,104, with the unemployment rate averaging 7.9% in 2009.

In 2005, there was 40.3 square miles of developed land and 169.3 square miles of agricultural land in the county. There is an average of 14 people per square mile in Iron County, compared to a state average of 34 people per square mile.

# ECONOMIC SNAPSHOT

## Iron County



Utah Department of Workforce Services

### Year-to-Year Change in Nonfarm Jobs

MARCH 2014\*

↑ 788

5.2%

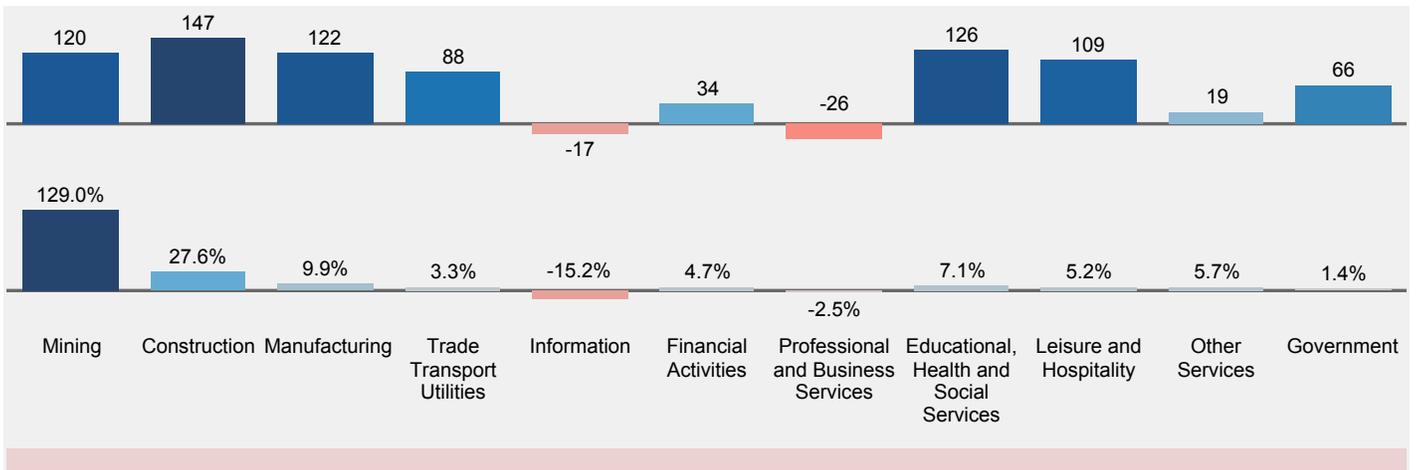
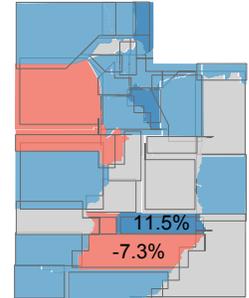
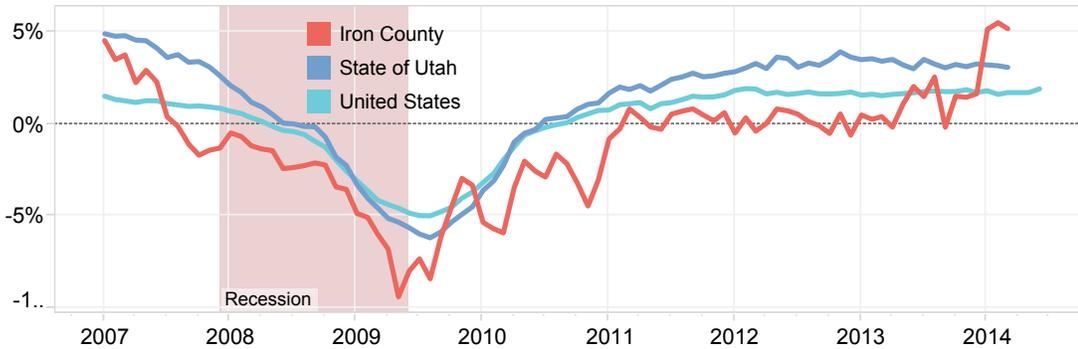
Iron County

3.1%

State of Utah

1.7%

United States



### Seasonally Adjusted Unemployment Rates

JUNE 2014\*

4.3%

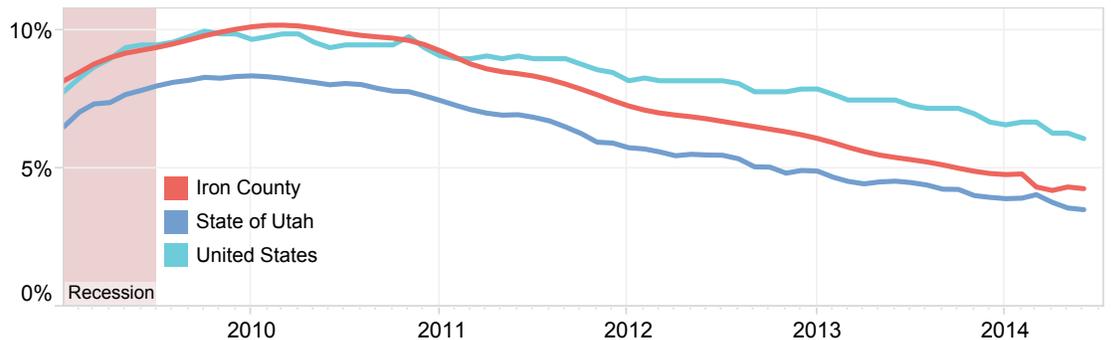
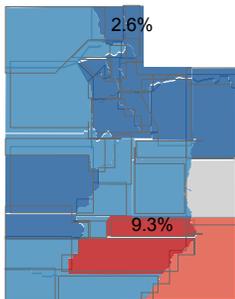
Iron County

3.5%

State of Utah

6.1%

United States



\*Preliminary Updated 7/22/2014. Source: U.S. Bureau of Labor Statistics; Utah Department of Workforce Services.

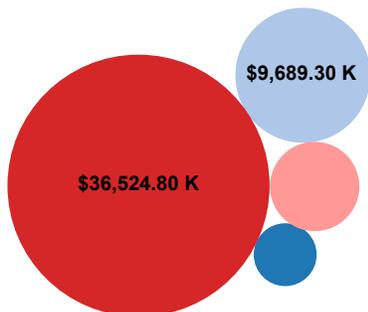


## Construction Permitting ANNUAL 2013

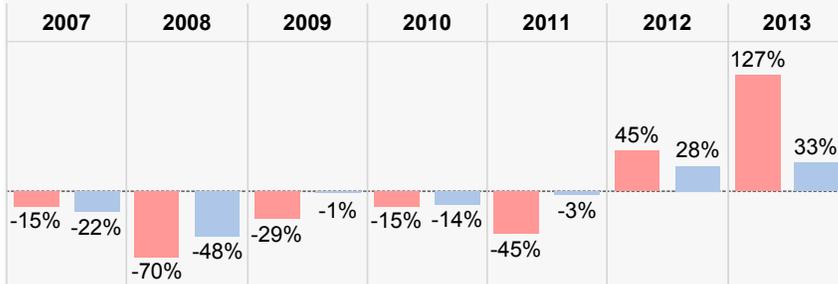
### Dwelling Unit Permits



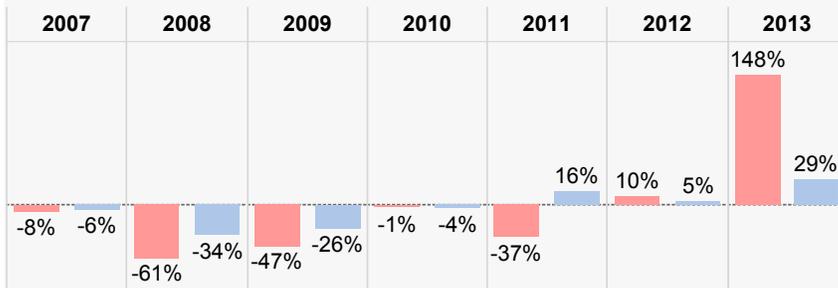
### Annual Values



### Change in Dwelling Units



### Change In Total Construction Values

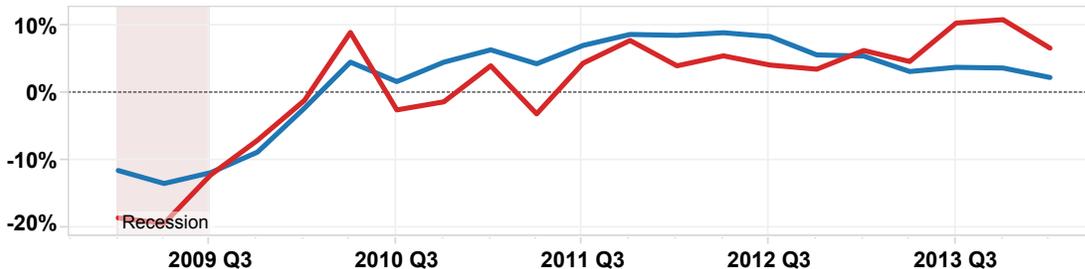
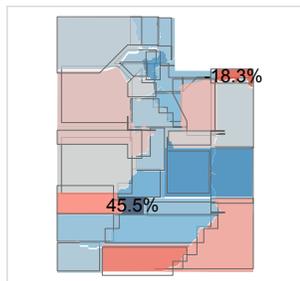


## Year-Over Change In Gross Taxable Sales

### First Quarter 2014

Iron County  
\$ 6.6%

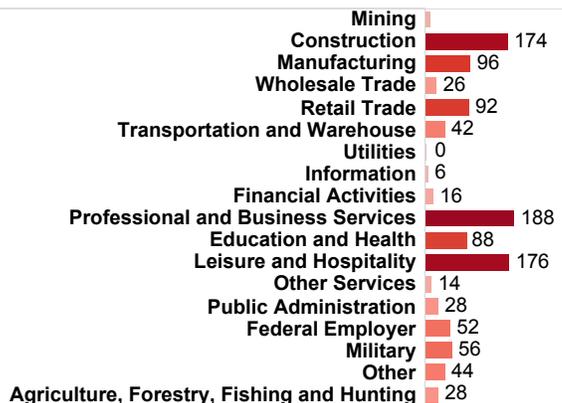
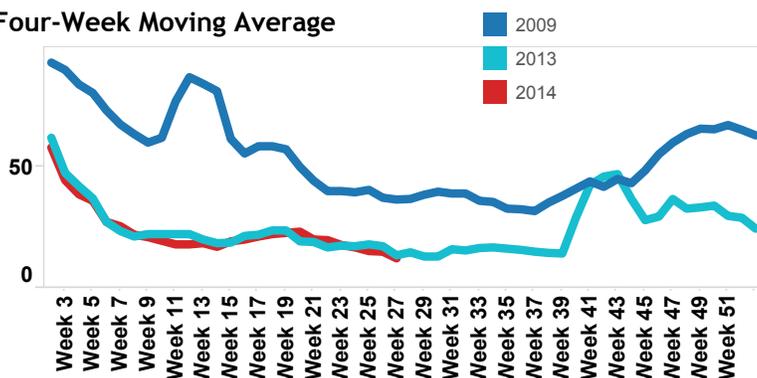
State of Utah  
\$ 2.2%



## Initial Claims for Unemployment Insurance

### YTD July 5, 2014

### Four-Week Moving Average



# Nonfarm Employment

## Iron County

First Quarter 2014

	January			February			March				
	Change 2013 - 2014		2013	Change 2013 - 2014		2013	Change 2013 - 2014		2013	Change 2013 - 2014	
	Percent	Numeric		Percent	Numeric		Percent	Numeric			
<b>Total Nonfarm Employment</b>	<b>15,106</b>	<b>15,884</b>	<b>778</b>	<b>15,214</b>	<b>16,052</b>	<b>838</b>	<b>15,216</b>	<b>16,004</b>	<b>788</b>		
<b>Goods Production</b>	<b>1,833</b>	<b>2,261</b>	<b>428</b>	<b>1,832</b>	<b>2,247</b>	<b>415</b>	<b>1,864</b>	<b>2,253</b>	<b>389</b>		
Mining	94	226	132	88	212	124	93	213	120		
Construction	492	672	180	498	685	187	533	680	147		
Manufacturing	1,247	1,363	116	1,246	1,350	104	1,238	1,360	122		
<b>Service Production</b>	<b>13,273</b>	<b>13,623</b>	<b>350</b>	<b>13,382</b>	<b>13,805</b>	<b>423</b>	<b>13,352</b>	<b>13,751</b>	<b>399</b>		
Trade, Transportation, and Utilities	2,652	2,735	83	2,659	2,750	91	2,668	2,756	88		
Wholesale Trade	325	344	19	332	360	28	340	360	20		
Retail Trade	1,967	2,052	85	1,967	2,049	82	1,997	2,057	60		
Transportation and Warehousing	272	256	-16	271	257	-14	243	255	12		
Utilities	88	83	-5	89	84	-5	88	84	-4		
Information	108	90	-18	108	90	-18	112	95	-17		
Financial Activities	723	755	32	727	757	30	720	754	34		
Finance and Insurance	554	555	1	555	559	4	550	556	6		
Real Estate & Rental and Leasing	169	200	31	172	198	26	170	198	28		
Professional and Business Services	1,028	1,041	13	1,059	1,061	2	1,046	1,020	-26		
Professional/Sci/Technical Svcs	317	354	37	333	367	34	342	373	31		
Management of Companies	41	37	-4	39	40	1	40	41	1		
Admin Support/Waste Mgmt	670	650	-20	687	654	-33	664	606	-58		
Educational, Health, Social Svcs	1,753	1,902	149	1,765	1,907	142	1,786	1,912	126		
Educational Services	135	154	19	135	150	15	140	150	10		
Health Care and Social Services	1,618	1,748	130	1,630	1,757	127	1,646	1,762	116		
Leisure and Hospitality	2,121	2,264	143	2,107	2,241	134	2,084	2,193	109		
Arts, Entertainment, Recreation	455	515	60	434	479	45	405	395	-10		
Accommodation & Food Svcs	1,666	1,749	83	1,673	1,762	89	1,679	1,798	119		
Other Services	328	337	9	332	345	13	331	350	19		
Government	4,560	4,499	-61	4,625	4,654	29	4,605	4,671	66		
Federal	258	263	5	260	260	0	260	264	4		
State	2,118	2,089	-29	2,115	2,225	110	2,132	2,230	98		
Local	2,184	2,147	-37	2,250	2,169	-81	2,213	2,177	-36		
Covered Ag, Forestry, Fishing, Hunting*	307	302	-5	310	322	12	325	323	-2		

\* Employment "covered" under the Employment Security Act. Includes some, but not all, agriculture. Excludes most self-employed. Not included in total employment.

Note: Detail may not add to total due to rounding.

p = Preliminary, d = Not shown to avoid disclosure of individual firm data

Source: Utah Department of Workforce Services.

Last updated 8/19/2014 3:00:58 PM

## **F. KANE COUNTY**

### **Background**

Kane County is located along Utah's southern border with Arizona. Garfield County borders Kane on the north, Iron County borders Kane on the west, and San Juan County borders Kane on the southeast. The main highway running through Kane County is U.S. Highway 89. The high desert landscape of Kane County belongs to the Colorado Plateau geographical province. The waters of man-made Lake Powell on the Colorado River form the county's eastern border, and most of the streams in Kane County are part of the Colorado River system.

Kane County has an area of about 2,553,375 acres. Of these acres, 85% are federally owned, 10% are state owned, and 5% are privately owned. Kane County's population is about 6,046. The density of the county is approximately 1.47 people per square mile.

Mean annual valley temperatures vary from 45°F to 61°F. Summer temperatures over 110°F are not uncommon. Precipitation ranges from six inches in the desert areas to 35 inches in the high mountains. Elevations range from 2,297 feet to 10,375 feet above sea level.

The area is marked by colorful cliffs and plateaus on the east to broad valleys and mountains to the west. Pinyon/juniper and mountain shrubs are the primary vegetation. These plants cover nearly one-third of the area, with rock land accounting for 15 percent. There are 25,600 acres of irrigated cropland in the county. The federal government administers over two-thirds of the total area and the state about eight percent. About 23 percent of the land is in private ownership, and 1.3 percent is tribal lands.

# ECONOMIC SNAPSHOT

## Kane County



Utah Department of Workforce Services

### Year-to-Year Change in Nonfarm Jobs

MARCH 2014\*

↑ 102

3.7%

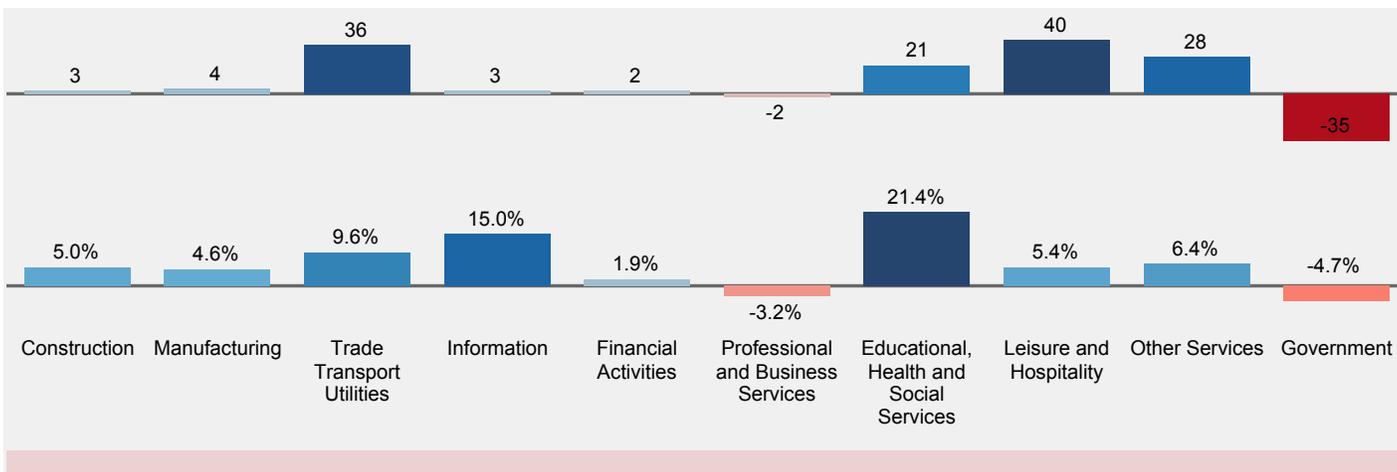
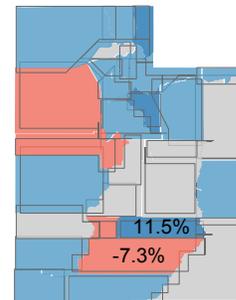
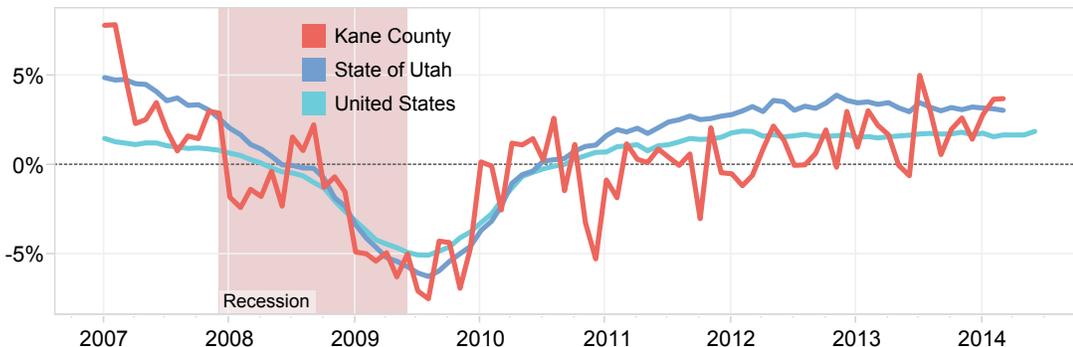
Kane County

3.1%

State of Utah

1.7%

United States



### Seasonally Adjusted Unemployment Rates

JUNE 2014\*

4.6%

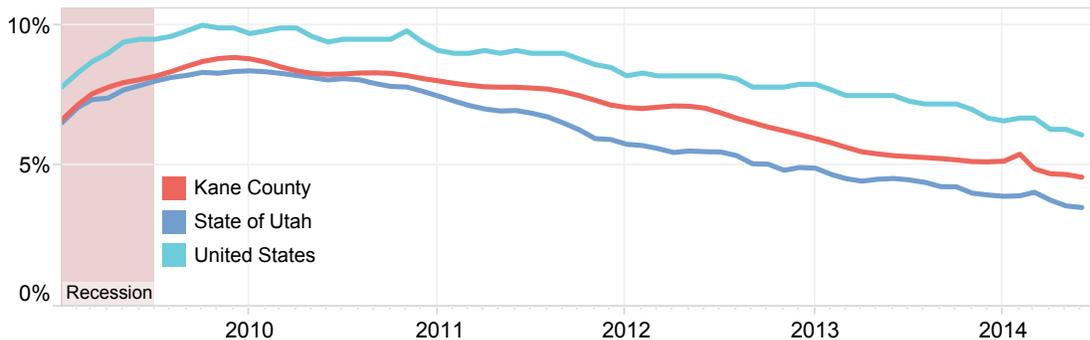
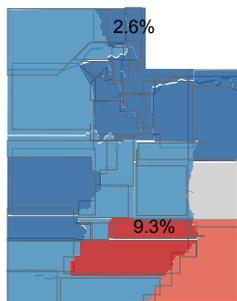
Kane County

3.5%

State of Utah

6.1%

United States



\*Preliminary Updated 7/22/2014.  
Source: U.S. Bureau of Labor Statistics; Utah Department of Workforce Services.

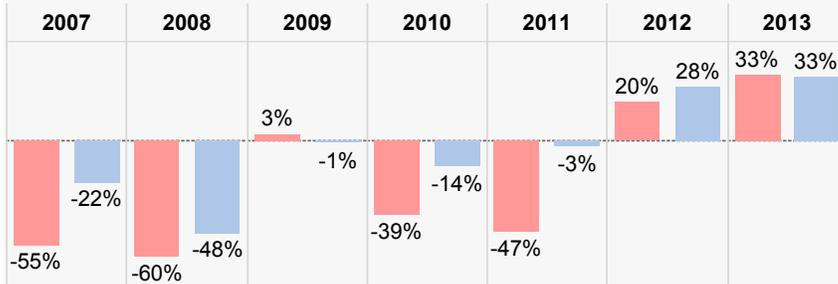


## Construction Permitting ANNUAL 2013

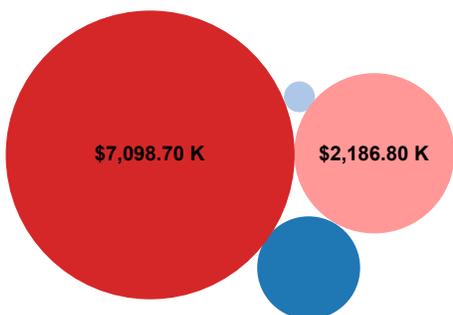
### Dwelling Unit Permits



### Change in Dwelling Units



### Annual Values

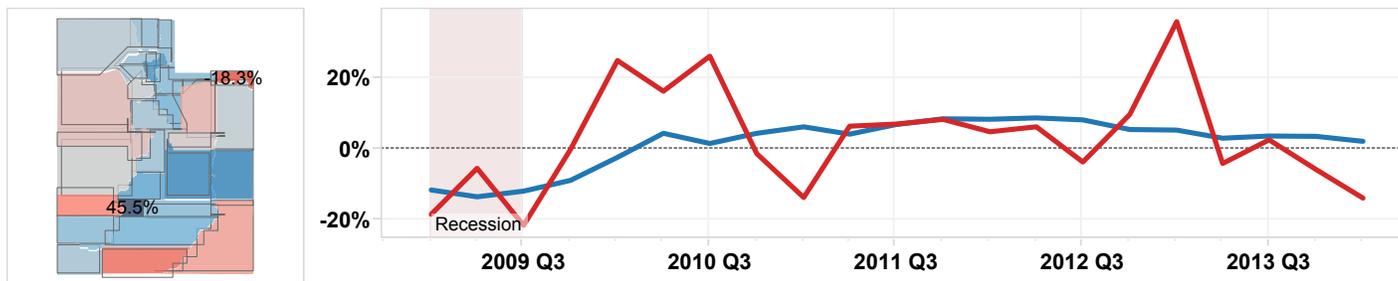


### Change In Total Construction Values



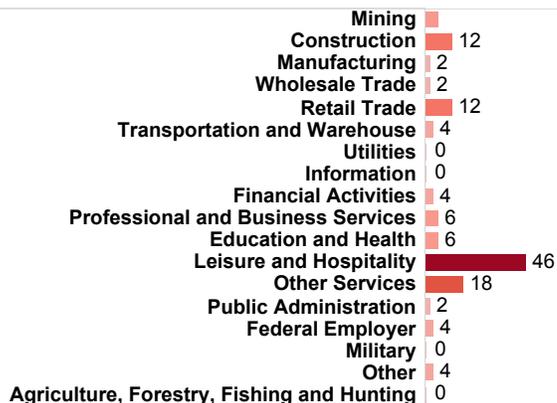
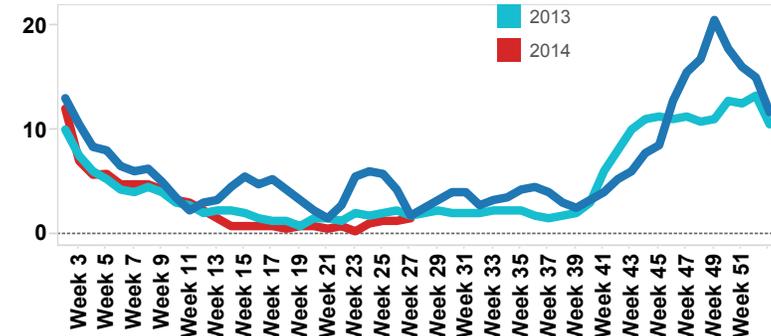
## Year-Over Change In Gross Taxable Sales First Quarter 2014

Kane County **-\$13.9%**  
State of Utah **\$ 2.2%**



## Initial Claims for Unemployment Insurance YTD July 5, 2014

### Four-Week Moving Average



# Nonfarm Employment

## Kane County

First Quarter 2014

	January				February				March			
	2013		Change 2013 - 2014		2013		Change 2013 - 2014		2013		Change 2013 - 2014	
	2014(p)	Percent	Numeric	Percent	2014(p)	Percent	Numeric	Percent	2014(p)	Percent	Numeric	Percent
<b>Total Nonfarm Employment</b>	<b>2,574</b>	<b>2,647</b>	<b>73</b>	<b>2.8%</b>	<b>2,598</b>	<b>2,694</b>	<b>96</b>	<b>3.7%</b>	<b>2,735</b>	<b>2,837</b>	<b>102</b>	<b>3.7%</b>
<b>Goods Production</b>	<b>149</b>	<b>151</b>	<b>2</b>	<b>1.3%</b>	<b>142</b>	<b>153</b>	<b>11</b>	<b>7.7%</b>	<b>150</b>	<b>159</b>	<b>9</b>	<b>6.0%</b>
Mining	d	d			d	d			d	d		
Construction	d	d			d	d			d	d		
Manufacturing	88	87	-1	-1.1%	84	90	6	7.1%	87	91	4	4.6%
<b>Service Production</b>	<b>2,425</b>	<b>2,496</b>	<b>71</b>	<b>2.9%</b>	<b>2,456</b>	<b>2,541</b>	<b>85</b>	<b>3.5%</b>	<b>2,585</b>	<b>2,678</b>	<b>93</b>	<b>3.6%</b>
Trade, Transportation, and Utilities	353	386	33	9.3%	353	391	38	10.8%	374	410	36	9.6%
Wholesale Trade	25	29	4	16.0%	25	29	4	16.0%	28	31	3	10.7%
Retail Trade	272	305	33	12.1%	271	308	37	13.7%	288	321	33	11.5%
Transportation and Warehousing	d	d			d	d			d	d		
Utilities	d	d			d	d			d	d		
Information	19	25	6	25	19	24	5	23	20	23	3	15
Financial Activities	99	104	5	5.1%	105	106	1	1.0%	104	106	2	1.9%
Finance and Insurance	77	79	2	2.6%	83	81	-2	-2.4%	82	81	-1	-1.2%
Real Estate and Rental and Leasing	22	25	3	13.6%	22	25	3	13.6%	22	25	3	13.6%
Professional and Business Services	57	51	-6	-10.5%	60	51	-9	-15.0%	62	60	-2	-3.2%
Professional/Sci/Technical Svcs	41	31	-10	-24.4%	41	31	-10	-24.4%	40	33	-7	-17.5%
Management of Companies	0	0	0	0	0	0	0	0	0	0	0	0
Admin Support/Waste Mgmt	16	20	4	25.0%	19	20	1	5.3%	22	27	5	22.7%
Educational, Health, Social Svcs	88	104	16	18.2%	90	115	25	27.8%	98	119	21	21.4%
Educational Services	0	0	0	0	0	0	0	0	0	0	0	0
Health Care and Social Services	88	104	16	18.2%	90	115	25	27.8%	98	119	21	21.4%
Leisure and Hospitality	632	662	30	4.7%	633	679	46	7.3%	744	784	40	5.4%
Arts, Entertainment, Recreation	25	32	7	28.0%	21	30	9	42.9%	35	36	1	2.9%
Accommodation & Food Svcs	607	630	23	3.8%	612	649	37	6.0%	709	748	39	5.5%
Other Services	444	457	13	2.9%	445	452	7	1.6%	436	464	28	6.4%
Government	733	707	-26	-3.5%	751	723	-28	-3.7%	747	712	-35	-4.7%
Federal	85	76	-9	-10.6%	87	81	-6	-6.9%	92	83	-9	-9.8%
State	72	72	0	0.0%	73	73	0	0.0%	73	73	0	0.0%
Local	576	559	-17	-3.0%	591	569	-22	-3.7%	582	556	-26	-4.5%
Covered Ag, Forestry, Fishing, Hunting*	d	d			d	d			d	d		

\* Employment "covered" under the Employment Security Act. Includes some, but not all, agriculture. Excludes most self-employed. Not included in total employment.

Note: Detail may not add to total due to rounding.

p = Preliminary, d = Not shown to avoid disclosure of individual firm data

Source: Utah Department of Workforce Services.

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## **G. WASHINGTON COUNTY**

### **Background**

Washington County is comprised of approximately 1,553,280 acres and is in the southwestern corner of Utah. The majority of the county is public land or urban land. Most federal public land is administered by the United States Forest Service (USFS), Bureau of Land Management (BLM), and National Parks Service (NPS). Much of the state land is administered by the School and Institutional Trust Lands Administration (SITLA) and Utah Division of Wildlife Resources (DWR).

Major land uses in the county include range, alfalfa and grass hay, corn and small grains crops, fruit and nut orchards, forest production, and industrial and urban areas. Recreational uses are also common on both private and public lands.

Elevation and land cover are diverse within the county. Elevations range from over 10,300 feet in the Pine Valley Mountains, found on the northern end of the county, down to 2,000 feet in the Beaver Dam Wash, which is located in the most southwest corner of the county. The county includes the following mountain ranges: Pine Valley Mountains, Beaver Dam Mountains, Bull Valley Mountains, Vermilion Cliffs, and Kolob Mountain. The valley areas in and around St. George are within the Mohave Desert zone and are very hot during summer months. Due to the variability of elevation, the county's precipitation, land cover, and land uses are also quite variable.

# ECONOMIC SNAPSHOT

## Washington County



Utah Department of Workforce Services

### Year-to-Year Change in Nonfarm Jobs

MARCH 2014\*

↑ 3,416

3.1%

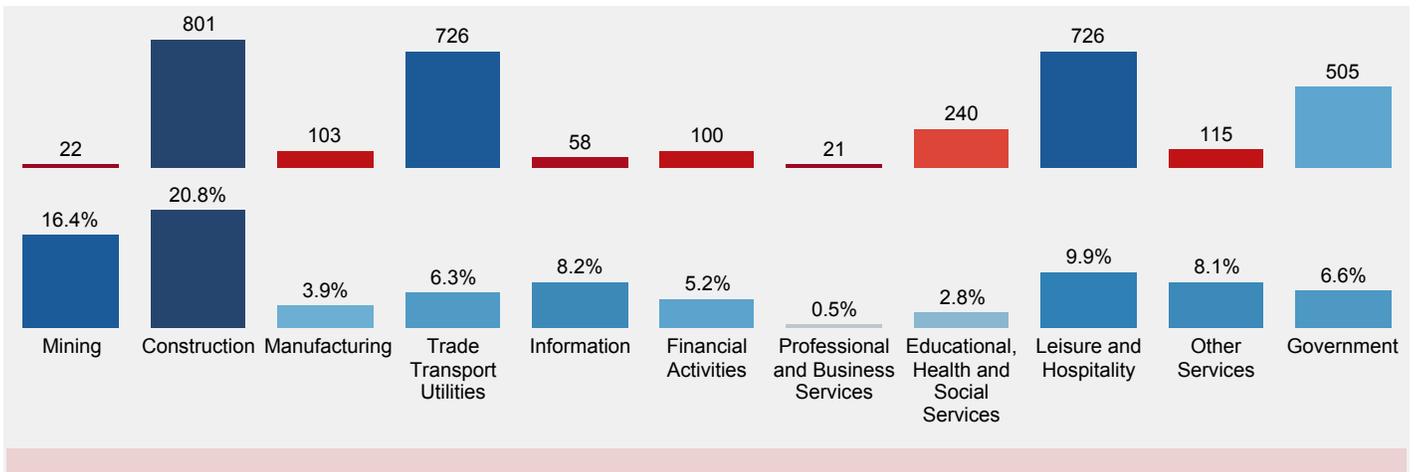
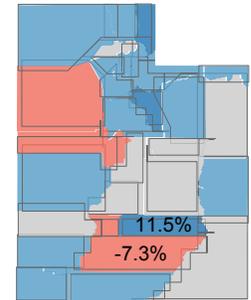
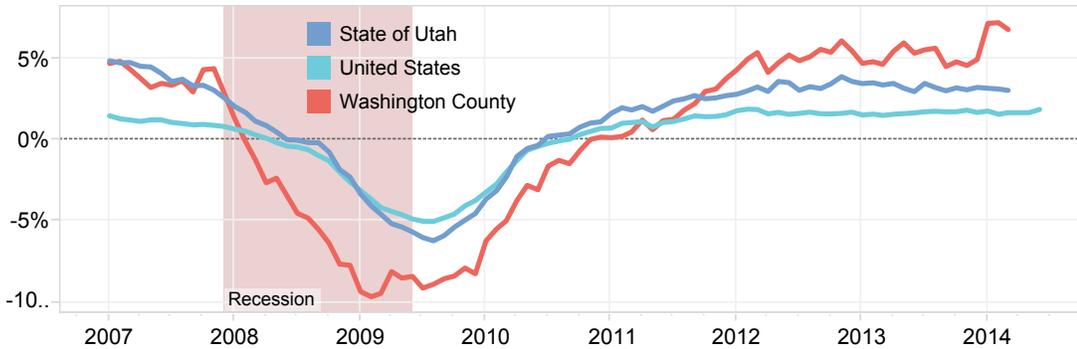
State of Utah

1.7%

United States

6.8%

Washington County



### Seasonally Adjusted Unemployment Rates

JUNE 2014\*

3.5%

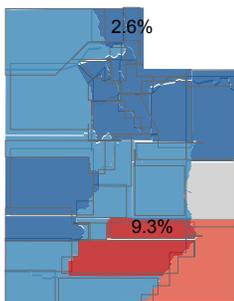
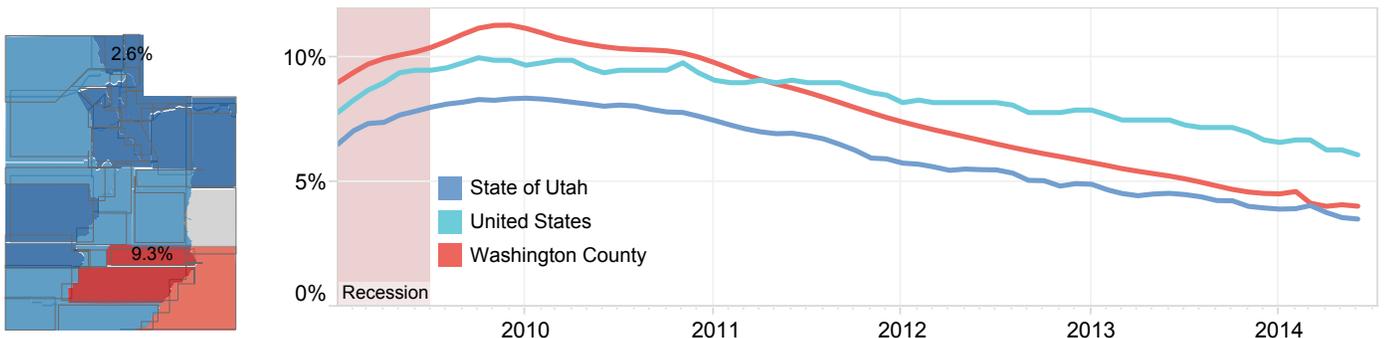
State of Utah

6.1%

United States

4.0%

Washington County



\*Preliminary Updated 7/22/2014. Source: U.S. Bureau of Labor Statistics; Utah Department of Workforce Services.



## Construction Permitting ANNUAL 2013

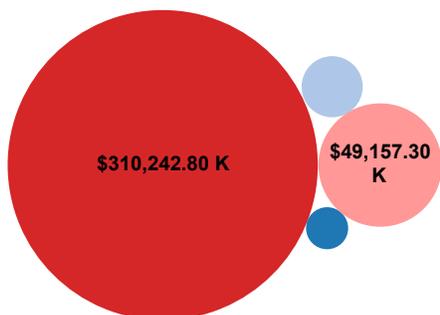
### Dwelling Unit Permits



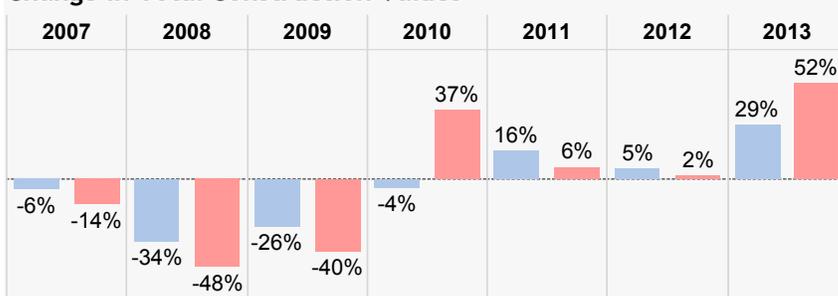
### Change in Dwelling Units



### Annual Values



### Change In Total Construction Values



## Year-Over Change In Gross Taxable Sales

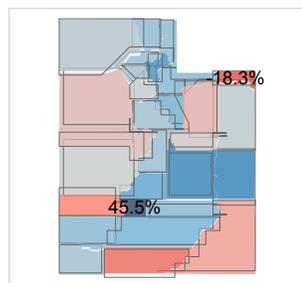
First Quarter 2014

State of Utah

\$ 2.2%

Washington County

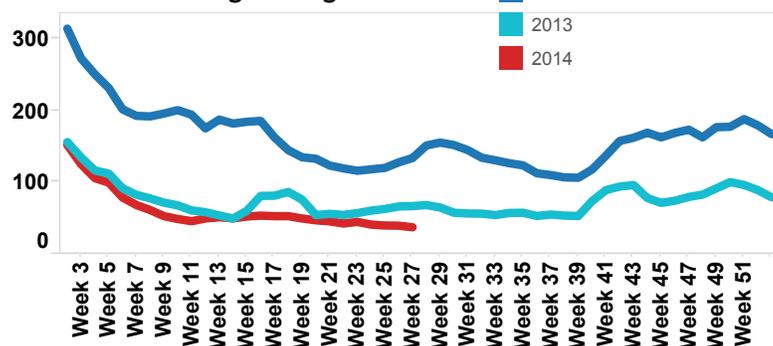
\$ 4.1%



## Initial Claims for Unemployment Insurance

YTD July 5, 2014

### Four-Week Moving Average



Source: Utah Dept. of Workforce Services, Utah Bureau of Economic and Business Research, Utah State Tax Commission.

# Nonfarm Employment

## Washington County

First Quarter 2014

	January			February			March					
	Change 2013 - 2014		2013	Change 2013 - 2014		2013	Change 2013 - 2014		2013	Change 2013 - 2014		
	2014(p)	Percent		2014(p)	Percent		2014(p)	Percent		2014(p)	Percent	Numeric
<b>Total Nonfarm Employment</b>	<b>48,396</b>	<b>51,884</b>	<b>3,488</b>	<b>7.2%</b>	<b>49,084</b>	<b>52,642</b>	<b>3,558</b>	<b>7.2%</b>	<b>49,996</b>	<b>53,409</b>	<b>3,413</b>	<b>6.8%</b>
<b>Goods Production</b>	<b>6,524</b>	<b>7,429</b>	<b>905</b>	<b>13.9%</b>	<b>6,512</b>	<b>7,440</b>	<b>928</b>	<b>14.3%</b>	<b>6,606</b>	<b>7,532</b>	<b>926</b>	<b>14.0%</b>
Mining	132	165	33	25.0%	126	146	20	15.9%	134	156	22	16.4%
Construction	3,762	4,536	774	20.6%	3,760	4,585	825	21.9%	3,849	4,650	801	20.8%
Manufacturing	2,630	2,728	98	3.7%	2,626	2,709	83	3.2%	2,623	2,726	103	3.9%
<b>Service Production</b>	<b>41,872</b>	<b>44,455</b>	<b>2,583</b>	<b>6.2%</b>	<b>42,572</b>	<b>45,202</b>	<b>2,630</b>	<b>6.2%</b>	<b>43,390</b>	<b>45,877</b>	<b>2,487</b>	<b>5.7%</b>
Trade, Transportation, and Utilities	11,321	12,030	709	6.3%	11,374	12,142	768	6.8%	11,524	12,247	723	6.3%
Wholesale Trade	1,291	1,182	-109	-8.4%	1,331	1,191	-140	-10.5%	1,334	1,194	-140	-10.5%
Retail Trade	7,318	7,678	360	4.9%	7,293	7,763	470	6.4%	7,424	7,881	457	6.2%
Transportation and Warehousing	2,585	3,045	460	17.8%	2,624	3,066	442	16.8%	2,640	3,049	409	15.5%
Utilities	127	125	-2	-1.6%	126	122	-4	-3.2%	126	123	-3	-2.4%
Information	699	739	40	5.7%	697	746	49	7.0%	708	766	58	8.2%
Financial Activities	1,882	2,005	123	6.5%	1,892	2,039	147	7.8%	1,925	2,025	100	5.2%
Finance and Insurance	1,181	1,236	55	4.7%	1,199	1,257	58	4.8%	1,201	1,220	19	1.6%
Real Estate & Rental and Leasing	701	769	68	9.7%	693	782	89	12.8%	724	805	81	11.2%
Professional and Business Services	3,883	3,923	40	1.0%	4,082	3,995	-87	-2.1%	4,112	4,133	21	0.5%
Professional/Sci/Technical Svcs	1,952	1,871	-81	-4.1%	1,996	1,895	-101	-5.1%	2,009	1,951	-58	-2.9%
Management of Companies	40	41	1	2.5%	41	41	0	0.0%	40	41	1	2.5%
Admin Support/Waste Mgmt	1,891	2,011	120	6.3%	2,045	2,059	14	0.7%	2,063	2,141	78	3.8%
Educational, Health, Social Svcs	8,530	8,823	293	3.4%	8,653	8,900	247	2.9%	8,678	8,918	240	2.8%
Educational Services	498	473	-25	-5.0%	506	477	-29	-5.8%	502	455	-47	-9.4%
Health Care and Social Services	8,032	8,350	318	4.0%	8,147	8,423	276	3.4%	8,176	8,463	287	3.5%
Leisure and Hospitality	6,608	7,462	854	12.9%	6,888	7,703	815	11.8%	7,319	8,045	726	9.9%
Arts, Entertainment, Recreation	744	728	-16	-2.2%	767	750	-17	-2.2%	804	789	-15	-1.9%
Accommodation & Food Svcs	5,864	6,734	870	14.8%	6,121	6,953	832	13.6%	6,515	7,256	741	11.4%
Other Services	1,349	1,495	146	10.8%	1,383	1,542	159	11.5%	1,416	1,531	115	8.1%
Government	7,597	7,975	378	5.0%	7,602	8,131	529	7.0%	7,704	8,209	505	6.6%
Federal	480	478	-2	-0.4%	483	489	6	1.2%	509	511	2	0.4%
State	1,520	1,723	203	13.4%	1,533	1,810	277	18.1%	1,544	1,846	302	19.6%
Local	5,597	5,774	177	3.2%	5,586	5,832	246	4.4%	5,651	5,852	201	3.6%
Covered Ag, Forestry, Fishing, Hunting*	83	92	9	10.8%	88	88	0	0.0%	88	85	-3	-3.4%

\* Employment "covered" under the Employment Security Act. Includes some, but not all, agriculture. Excludes most self-employed. Not included in total employment.

Note: Detail may not add to total due to rounding.

p = Preliminary, d = Not shown to avoid disclosure of individual firm data

Source: Utah Department of Workforce Services.

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### Southwest Region Population Change, 1970-2013

	1970	1980	1990	2000	2010	2013	Total % Change	Compound Annual Growth Rate	Share of State Change
State	1,059,273	1,461,037	1,772,850	2,233,169	2,763,885	2,900,872	173.9%	2.4%	100.0%
Southwest	35,224	55,489	83,263	140,919	203,204	213,382	505.8%	4.3%	9.7%
Beaver	3,800	4,378	4,765	6,005	6,629	6,459	70.0%	1.2%	0.1%
Garfield	3,157	3,673	3,980	4,735	5,172	5,083	61.0%	1.1%	0.1%
Iron	12,177	17,349	20,789	33,779	46,163	46,780	284.2%	3.2%	1.9%
Kane	2,421	4,024	5,169	6,046	7,125	7,260	199.9%	2.6%	0.3%
Washington	13,669	26,065	48,560	90,354	138,115	147,800	981.3%	5.7%	7.3%

*Source: U.S. Census Bureau.*

### County Population as a Share of Region

	1970	1980	1990	2000	2010	2013
Beaver	10.8%	7.9%	5.7%	4.3%	3.3%	3.0%
Garfield	9.0%	6.6%	4.8%	3.4%	2.5%	2.4%
Iron	34.6%	31.3%	25.0%	24.0%	22.7%	21.9%
Kane	6.9%	7.3%	6.2%	4.3%	3.5%	3.4%
Washington	38.8%	47.0%	58.3%	64.1%	68.0%	69.3%

# Economic Summary

June

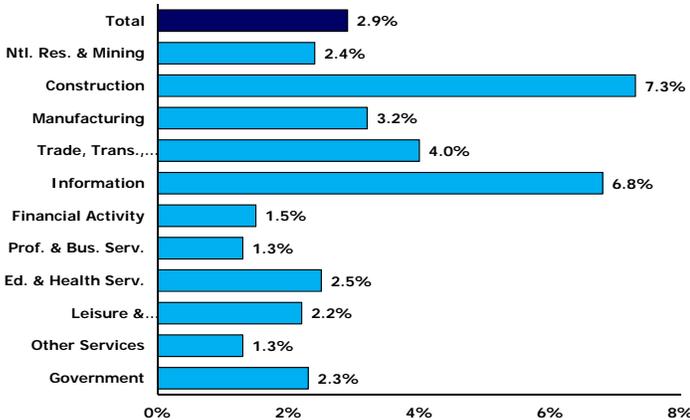
Utah State Data Center  
Bureau of Economic and Business Research  
University of Utah

## Employment

**Employment Change**—Utah's nonagricultural employment increased an estimated 2.9%, or 37,500 jobs, between May 2013 and May 2014. Nationally, employment increased 1.8%, or 2.2 million jobs, from May 2013 and May 2014.

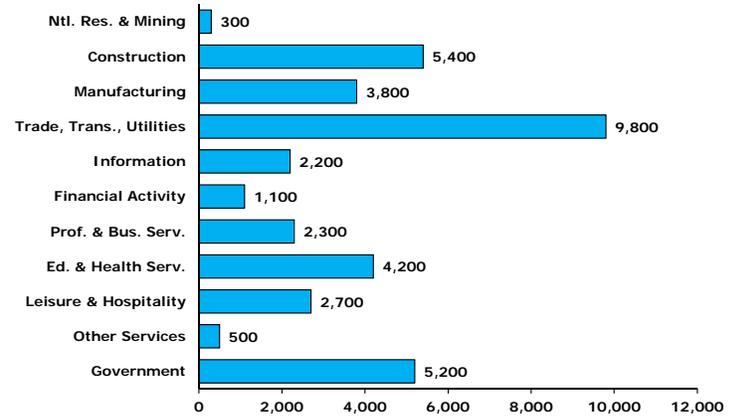
**Unemployment**—Utah's unemployment rate was 3.6% during May 2014, lower than the May 2013 unemployment rate of 4.5%. The national unemployment rate was 6.3% in May 2014 lower than the May 2013 rate of 7.5%.

Percent Change in Utah Employment by Industry: May 2013 to May 2014



Source: Department of Workforce Services

Numerical Change in Utah Employment by Industry: May 2013 to May 2014



Source: Department of Workforce Services

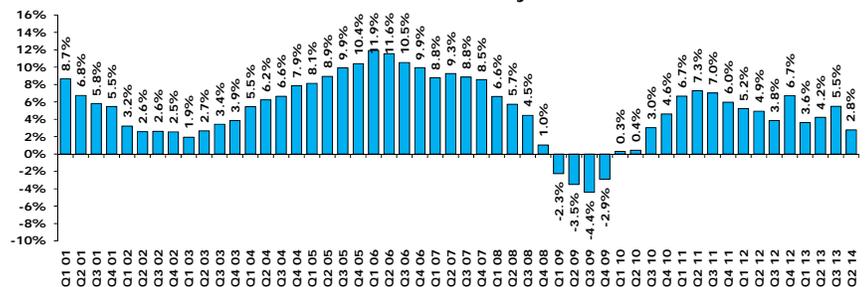
## Wages and Income

**Total Personal Income**—Utah's total personal income reached \$106.9 billion\* in fourth quarter of 2013. The change of 2.8% from fourth quarter 2012 was fourth in the nation. National change in personal income over the same period was 3.6%.

**Average Annual Pay**—Utah's average annual pay grew 1.0% to reach \$41,047 in 2013. Annual pay is forecast to increase 1.9% to \$41,828 in 2014. Average annual pay for the nation in 2013 was \$52,347 and is forecast to be \$53,474 in 2014, an increase of 2.2%.

\*seasonally adjusted at an annual rate

Utah Year-Over Growth in Quarterly Personal Income



Source: Bureau of Economic Analysis

## GDP, CPI, Interest Rates, and Home Prices

**Interest Rates**—The 30-year fixed-rate mortgage (FRM) averaged 4.17% for the week ending June 19, 2014 according to Freddie Mac.

**Home Prices**—According to the Federal Housing Finance Agency (FHFA) House Price Appreciation Ranking, Utah's house prices were up 7.2% in the first quarter of 2014 from first quarter of 2013. This ranks Utah 14th in the nation.

**Foreclosure Rates**—At the end of the first quarter 2014, 1.4% of all loans were in foreclosure, ranking Utah 13th in the nation.

Indicator	Period	Value	Period	Value
GDP	Q1-14	1.0%	Q4-13	2.6%
CPI	May-14	2.1%	Apr-14	2.0%
CPI-core	May-14	2.0%	Apr-14	1.8%

Note: CPI-core excludes Food and Energy

Home Prices: First Quarter 2014 Over First Quarter 2013

	Moody's Analytics		FHFA	
	Median Sales Price	Change	HPI Change	Purchase-Only Change
Logan, UT-ID MSA	\$166,300	7.6%	4.2%	na
Ogden-Clearfield, UT MSA	\$184,220	9.8%	5.7%	na
Provo-Orem, UT MSA	\$187,720	12.8%	8.9%	na
Salt Lake City, UT MSA	\$245,120	12.9%	9.0%	5.4%
St. George	\$171,770	15.4%	11.5%	na
Utah	\$197,570	12.0%	8.4%	7.2%
U.S.	\$202,530	9.1%	7.0%	6.6%

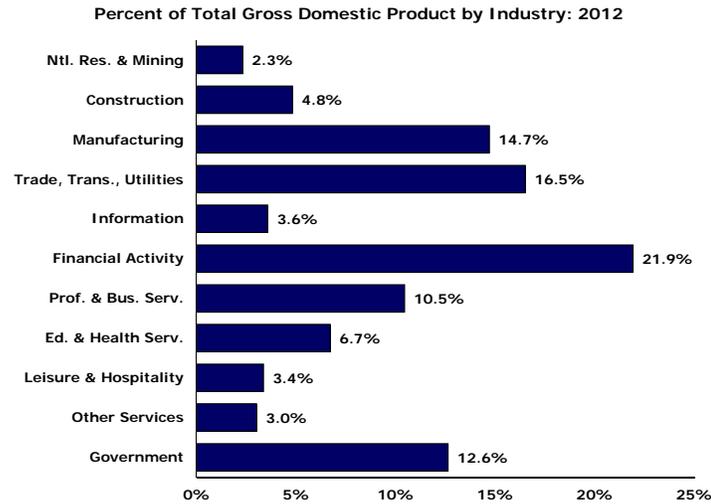
Note: The median price is for existing single family homes, seasonally adjusted, from Economy.com. Home price data from the FHFA is limited to conventional mortgages guaranteed by Fannie Mae or Freddie Mac. The House Price Index includes purchases and refinances, while the Purchase-Only Index excludes refinances.  
Source: Bureau of Economic Analysis

## Utah Rankings

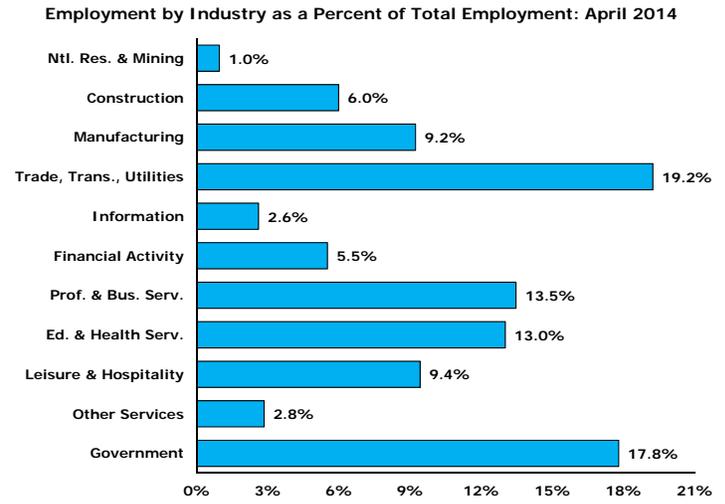
Demographic	State Rank	Value	Year	Economic	State Rank	Value	Year
Population Growth Rate	3rd	1.6%	2013	Employment Change <sup>1,2</sup>	7th	3.0%	May 2014
Fertility Rate	1st	2.37	2012	Unemployment Rate <sup>1,2</sup>	3rd	3.6%	May 2014
Life Expectancy	10th	80.2	2010	Median Household Income	13th	\$58,235	2010-2012
Median Age	1st	29.9	2012	Average Annual Pay	37th	\$41,300	2012
Household Size	1st	3.14	2012	Per Capita Personal Income	45th	\$36,274	2013
<b>Social Indicators</b>				Total Personal Income (% Change)	4th	2.8%	Q4 12-Q4 13
Poverty Rate	8th	10.7%	2010-2012				
<b>Educational Attainment</b>							
Persons 25+ w/high school degree	10th	91.0%	2012				
Persons 25+ w/bachelor's degree	16th	30.7%	2012				

Notes: 1. Rankings are based on the most recent data available for all states and may differ from other data.  
 2. Job Growth and Unemployment rates are seasonally adjusted and are based on national data from BLS, which can differ from state values.  
 3. Rank is most favorable to least favorable.

## Industry Focus

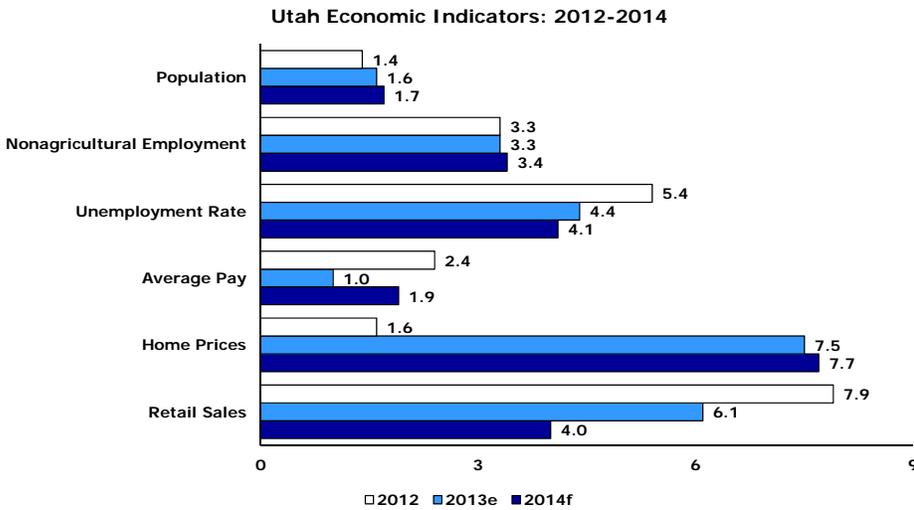


Source: Bureau of Economic Analysis



Source: Department of Workforce Services

## Economic Outlook



Source: Council of Economic Advisors' Revenue Assumptions Working Group

**Overview of the Economy**—Utah typically grows more rapidly than the nation after recessions, and this pattern is continuing in the current recovery. For the U.S., employment grew 1.7% in 2013, compared to 3.3% for Utah. While employment increased during 2013, Utah's unemployment rate also improved to 4.4%, lower than the rate of 5.4% in 2012. Though housing stabilized, with building permits at 13,500 in 2013, home-building is not leading the economy as it does during a typical recovery.

**Outlook 2014**—Utah's job growth is expected to grow at 3.4%, above the long-term average, while the nation is at 1.8%. With job growth above the long-term average, the unemployment rate will decrease to 4.4%. In contrast to the early stages of the recovery, housing will provide noticeable support to the expansion. Repeating its leading role from 2013, construction employment will grow 9.4% in 2014. The continuing housing recovery accounts for most of the strong showing in construction.

## Demographics

**Population**—Utah's 2013 total population count was 2,900,872. This represents a population increase of 46,001 people, or 1.6% from 2012, ranking Utah third among states in population growth. Utah grew more than twice as fast as the nation from 2012 to 2013. The total 2013 population count for the United States was 316,128,839. This represents a population increase of 2,255,154 people, or 0.7% from 2012.

**2014 Outlook**—Utah will continue to experience population growth at a rate higher than most states in 2014 on account of strong natural increase in addition to in-migration. Natural increase (births less deaths) is anticipated to add 37,200 people to Utah's population. While net in-migration has slowed during the economic recession, Utah's net migration is projected to increase to 11,700 people.

	Utah	United States
2012 Estimate	2,854,871	313,873,685
2013 Estimate	2,900,872	316,128,839
2012-2013 Percent Change	1.6%	0.7%
2012-2013 Absolute Change	46,001	2,255,154

12-MAY-14

ECONOMIC INDICATORS	UNITS	2011	2012	2013	2014	2015	PERCENT CHANGE			
		ACTUAL	ACTUAL	ESTIMATE	FORECAST	FORECAST	2012	2013	2014	2015
<b>PRODUCTION AND SPENDING</b>										
U.S. Real Gross Domestic Product	Billion Chained \$2009	15,052.4	15,470.7	15,761.3	16,133.2	16,646.9	2.8	1.9	2.4	3.2
U.S. Real Personal Consumption	Billion Chained \$2009	10,291.3	10,517.6	10,727.9	11,016.2	11,346.0	2.2	2.0	2.7	3.0
U.S. Real Private Fixed Investment	Billion Chained \$2009	2,184.6	2,365.3	2,470.9	2,573.5	2,827.5	8.3	4.5	4.2	9.9
U.S. Real Federal Defense Spending	Billion Chained \$2009	794.6	769.1	715.0	691.4	687.4	-3.2	-7.0	-3.3	-0.6
U.S. Real Exports	Billion Chained \$2009	1,890.6	1,957.5	2,010.1	2,066.4	2,175.7	3.5	2.7	2.8	5.3
Utah Exports (NAICS, Census)	Million Dollars	18,930.2	19,255.8	16,064.7	16,230.1	16,969.4	1.7	-16.6	1.0	4.6
Utah Coal Production	Million Tons	20.1	17.2	17.0	15.9	16.0	-14.5	-0.9	-6.5	0.6
Utah Crude Oil Production	Million Barrels	26.3	30.2	34.5	39.2	43.0	14.9	14.3	13.6	9.7
Utah Natural Gas Production Sales	Billion Cubic Feet	404.2	436.2	409.3	407.1	413.2	7.9	-6.2	-0.5	1.5
Utah Copper Mined Production	Million Pounds	533.0	373.9	486.9	434.6	465.8	-29.8	30.2	-10.7	7.2
Utah Molybdenum Production	Million Pounds	30.0	20.6	12.7	16.0	20.0	-31.3	-38.3	26.0	25.0
<b>SALES AND CONSTRUCTION</b>										
U.S. New Auto and Truck Sales	Millions	12.7	14.4	15.5	16.0	16.4	13.4	7.3	3.4	2.4
U.S. Housing Starts	Millions	0.61	0.78	0.93	1.02	1.40	28.0	18.6	10.3	36.6
U.S. Private Residential Investment	Billion Dollars	385.8	439.2	516.9	565.8	693.3	13.8	17.7	9.5	22.5
U.S. Nonresidential Structures	Billion Dollars	380.6	437.3	456.4	490.6	532.2	14.9	4.4	7.5	8.5
U.S. Home Price Index (FHFA)	1980Q1 = 100	312.4	312.2	324.9	350.3	363.5	-0.1	4.0	7.8	3.8
U.S. Nontaxable & Taxable Retail Sales	Billion Dollars	4,627.5	4,863.3	5,068.4	5,232.3	5,445.9	5.1	4.2	3.2	4.1
Utah New Auto and Truck Sales	Thousands	82.2	96.8	107.5	113.4	118.0	17.8	11.0	5.5	4.0
Utah Dwelling Unit Permits	Thousands	9.1	13.5	13.5	15.0	17.5	48.9	0.0	11.1	16.7
Utah Residential Permit Value	Million Dollars	1,700.0	2,584.4	2,941.1	3,100.0	3,700.0	52.0	13.8	5.4	19.4
Utah Nonresidential Permit Value	Million Dollars	1,195.8	1,063.0	727.7	900.0	1,200.0	-11.1	-31.5	23.7	33.3
Utah Additions, Alterations and Repairs	Million Dollars	863.7	653.0	603.4	500.0	600.0	-24.4	-7.6	-17.1	20.0
Utah Home Price Index (FHFA)	1980Q1 = 100	303.5	308.5	331.5	357.0	379.3	1.6	7.5	7.7	6.3
Utah Taxable Retail Sales	Million Dollars	21,799	23,510	24,944	25,941	27,073	7.9	6.1	4.0	4.4
Utah All Taxable Sales	Million Dollars	44,097	47,531	49,404	51,351	53,607	7.8	3.9	3.9	4.4
<b>DEMOGRAPHICS AND SENTIMENT</b>										
U.S. July 1st Population	Millions	312.3	314.6	317.0	319.5	321.9	0.7	0.8	0.8	0.8
U.S. Consumer Sentiment (U of M)	Diffusion Index	67.4	76.5	79.2	85.5	91.7	13.6	3.5	7.9	7.3
Utah July 1st Population	Thousands	2,813.9	2,852.4	2,897.2	2,946.1	2,997.3	1.4	1.6	1.7	1.7
Utah Net Migration	Thousands	2.3	2.4	8.2	11.7	13.5	2.4	244.8	43.6	14.8
<b>PROFITS AND RESOURCE PRICES</b>										
U.S. Corporate Before Tax Profits	Billion Dollars	1,847.4	2,190.0	2,263.8	2,597.0	2,633.1	18.5	3.4	14.7	1.4
U.S. Corporate Profit [above less Fed. Res.]	Billion Dollars	1,771.4	2,118.3	2,178.4	2,517.3	2,550.2	19.6	2.8	15.6	1.3
West Texas Intermediate Crude Oil	\$ Per Barrel	95.1	94.2	98.0	103.8	91.4	-0.9	4.0	6.0	-12.0
U.S. Coal Producer Price Index	1982 = 100	207.2	211.4	208.1	215.4	221.0	2.1	-1.6	3.5	2.6
Utah Coal Prices	\$ Per Short Ton	32.9	35.8	34.2	33.1	32.0	8.8	-4.5	-3.2	-3.3
Utah Oil Prices	\$ Per Barrel	82.5	82.7	84.8	84.0	79.0	0.2	2.5	-0.9	-6.0
Utah Natural Gas Prices	\$ Per MCF	3.92	2.82	3.70	4.60	4.35	-28.0	31.2	24.3	-5.4
Utah Copper Prices	\$ Per Pound	4.00	3.60	3.35	3.05	3.00	-10.0	-6.9	-9.0	-1.6
Utah Molybdenum Prices	\$ Per Pound	15.8	13.0	10.4	10.5	11.0	-17.7	-20.0	1.0	4.8
<b>INFLATION AND INTEREST RATES</b>										
U.S. CPI Urban Consumers (BLS)	1982-84 = 100	224.9	229.6	233.0	237.4	241.0	2.1	1.5	1.9	1.5
U.S. GDP Chained Price Index (BEA)	2005 = 100	103.2	105.0	106.5	108.3	110.3	1.7	1.4	1.7	1.8
U.S. Federal Funds Rate (FRB)	Effective Rate	0.10	0.14	0.11	0.09	0.35	37.7	-23.2	-20.1	310.9
U.S. 3-Month Treasury Bills (FRB)	Discount Rate	0.05	0.09	0.06	0.05	0.40	63.5	-32.0	-13.0	689.8
U.S. 10-Year Treasury Notes (FRB)	Yield (%)	2.79	1.80	2.35	2.89	3.30	-35.3	30.4	22.9	14.1
30 Year Mortgage Rate (FHLMC)	Percent	4.46	3.66	3.98	4.50	4.98	-18.0	8.9	13.0	10.8
<b>EMPLOYMENT AND WAGES</b>										
U.S. Establishment Employment (BLS)	Millions	131.8	134.1	136.4	138.8	141.0	1.7	1.7	1.8	1.6
U.S. Average Annual Pay (BLS)	Dollars	50,351	51,654	52,347	53,474	55,103	2.6	1.3	2.2	3.0
U.S. Total Wages & Salaries (BLS)	Billion Dollars	6,638.7	6,926.8	7,138.2	7,421.5	7,795.4	4.3	3.1	4.0	5.0
Utah Nonagricultural Employment (DWS)	Thousands	1,208.6	1,248.9	1,290.7	1,334.6	1,373.3	3.3	3.3	3.4	2.9
Utah Average Annual Pay (DWS)	Dollars	39,689	40,646	41,047	41,828	42,647	2.4	1.0	1.9	2.0
Utah Total Nonagriculture Wages (DWS)	Million Dollars	47,968	50,762	52,980	55,823	58,567	5.8	4.4	5.4	4.9
<b>INCOME AND UNEMPLOYMENT</b>										
U.S. Personal Income (BEA)	Billion Dollars	13,191	13,744	14,135	14,650	15,420	4.2	2.8	3.6	5.3
U.S. Unemployment Rate (BLS)	Percent	8.9	8.1	7.4	6.5	6.0	-9.6	-9.0	-11.9	-7.3
Utah Personal Income (BEA)	Million Dollars	96,175	101,163	105,227	110,433	115,821	5.2	4.0	4.9	4.9
Utah Unemployment Rate (DWS)	Percent	6.9	5.4	4.4	4.1	4.1	-21.5	-18.5	-6.8	0.0

Sources: State of Utah Revenue Assumptions Working Group, Moody's Economy.Com, and IHS Global Insight.

## H. ECONOMIC OUTLOOK

### Industrial Variety and the Southwest Utah Economy –July 2014

BY LECLA LANGSTON, *Regional economist for southwest Utah, and the Utah Department of Work Force Services*

In regional policy circles, conventional wisdom holds that industrial diversity paves the road to economic stability and growth. On the other hand, empirical research suggests much less certainty to that axiom. Economic stability does seem to show a correlation with industrial diversity. However, economic growth does not necessarily follow a varied industrial employment mix.

#### Measuring Industrial Diversity

A multiplicity of industrial diversity measures exist. This article uses the Hachman Index to measure diversity created by Frank Hachman of the Utah Bureau of Business and Economic Research. This index is derived from Location Quotients at the two-digit level of the North American Industry Classification System (NAICS). It measures how closely the employment distribution of an area resembles that of an industrially-diverse reference area. Here, the industrial employment distribution of counties in southwest Utah is compared to that of the nation. An area with a Hachman Index of 1.00 maintained an industrial employment mix exactly equal to the national employment distribution. In essence, the closer the index is to one, the more diverse the area's industry mix.

#### The Rankings

In 2012, Utah's Hachman Index, at 0.97, placed it as one of the most industrially diverse states in the union. Nevertheless, statewide diversity does not translate into county-level diversity. In 2012, none of Utah's counties showed a Hachman index as high as the state figure. Indices ranged from 0.95 for Salt Lake County to 0.09 in Duchesne County. Relatively diverse Washington (0.86) and Iron (0.83) counties ranked third and fifth, respectively, among all Utah counties. Kane (0.46) and Garfield (0.40) counties showed far less employment diversity. Finally, Beaver County (0.18) exhibited the fourth least diverse industrial mix in the state.

In Southwest Utah, larger counties displayed more industrial diversity than smaller counties, a pattern common throughout Utah. In Figure 1 county –level covered employment is plotted against the 2012 Hachman index to reveal that counties with higher employment do tend to show more diversity.

Iron County displayed a higher diversity ranking than its total employment level might suggest. This standing results primarily from a relatively high share of manufacturing jobs—an uncommon characteristic of non-urban counties. Access to rail transportation in Iron County provides a major spur to manufacturing activity. Beaver County's extremely low Hachman Index can be traced to its high concentration of jobs in covered agriculture. In Kane and Garfield counties, lower-than-average rankings stem from high concentrations of leisure/ hospitality employment in both areas. In addition, the strong employment presence of Best Friends Animal Sanctuary bulks up other services employment and lowers the county's overall diversity.

#### Time After Time

Industrial mix is not static. Some industries grow as others contract. Interestingly, during the economic boom that preceded the recession, Washington County became less diverse as the construction industry ate up a larger share of total employment. Through the recession and recovery, the county's diversity improved with a higher Hachman Index. For example, in 2007 during

the height of the expansion, the county's Hachman Index measured 0.77 compared to 0.86 in 2012. In contrast, Iron County's diversity increased during the boom, held steady during the recession and actually decreased somewhat in recovery. At the top of the economic expansion in 2007, Iron County's Hachman Index of 0.85 actually measured notably higher than Washington County's figure at 0.76. Kane, Beaver and Garfield counties showed similar patterns reaching the apex of their diversity in 2007 only see their indices contract back to 2001 levels by 2012.

### Stability and Growth

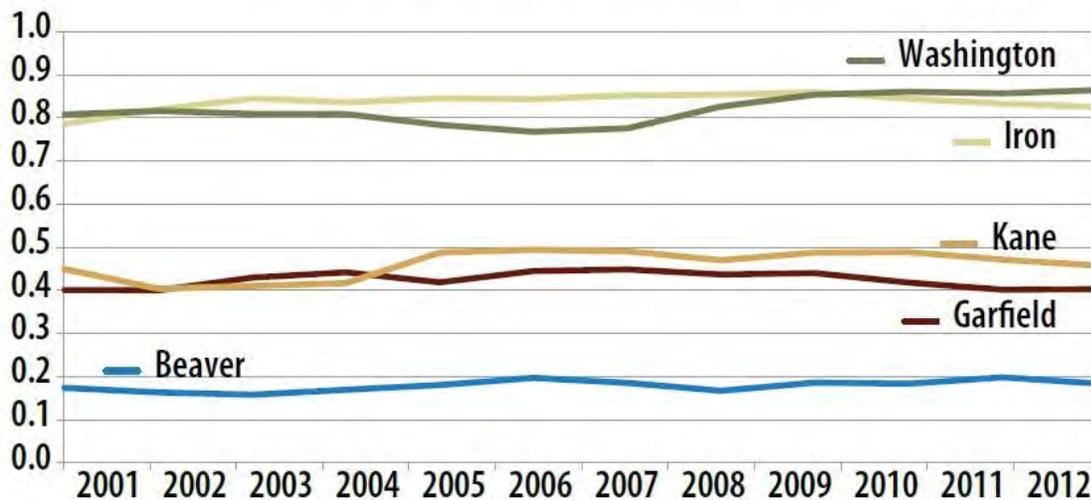
In small counties, a small numeric change can result in a large percent change in employment. Since size and diversity are related, the moderate correlation between diversity and stability may be overstated. Interestingly, Washington County, the most diverse county in southwest Utah, experienced the largest employment swings during the most recent boom to bust cycle. As most studies suggest, other factors may have greater sway on economic stability than mere industrial variety alone. Indeed, Iron County's manufacturing-related diversity actually seems to have compounded its difficulty in moving towards economic recovery as both manufacturing and construction imploded during the recession.

<sup>1</sup>Hachman Index formula: [http://home.business.utah.edu/bebrpsp/URPL5020/Concentration/HI\\_Calc.pdf](http://home.business.utah.edu/bebrpsp/URPL5020/Concentration/HI_Calc.pdf)

<sup>2</sup>Location Quotients quantify how concentrated a particular industry is in a region compared to the nation. It represents the share of industry employment in the region divided by the share of employment in the nation.

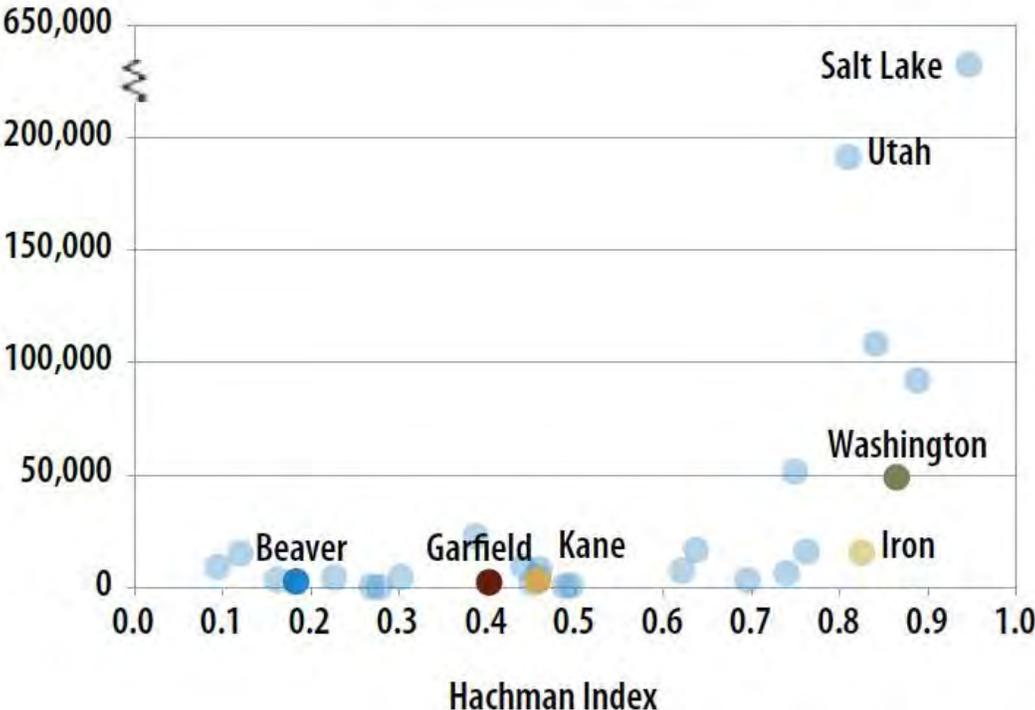
<sup>3</sup>See <http://economyutah.blogspot.com/2014/04/county-bycounty-economic-diversity.html>

**Figure 1: Hachman Index by County**



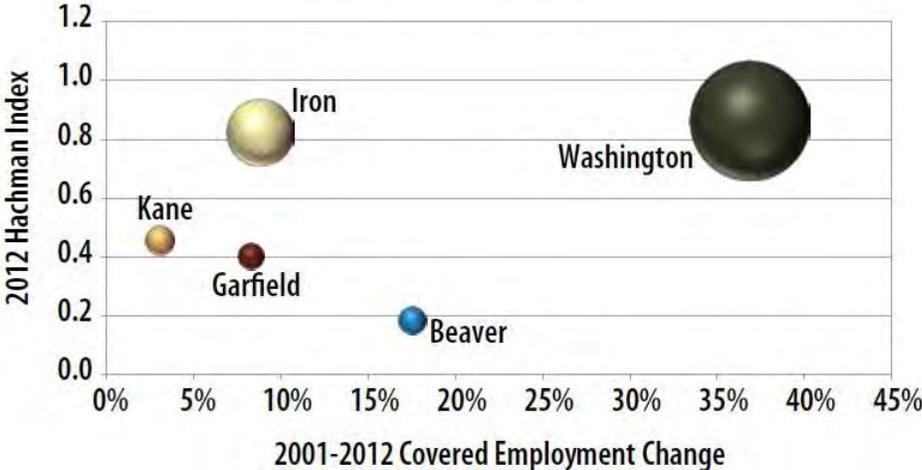
Source: U.S. Bureau of Labor Statistics and Utah Department of Workforce Services

**Figure 2: 2012 Hachman Index and Covered Employment by Counties in Utah**



Source: U.S. Bureau of Labor Statistics and Utah Department of Workforce Services

**Figure 3: 2001 to 2012 Covered Employment Growth and Hachman Index**



Source: U.S. Bureau of Labor Statistics and Utah Department of Workforce Services

## **All Southwest Utah Counties Finally Show Job Growth –July 2014**

*BY LECLA LANGSTON, Regional economist for southwest Utah, and the Utah Department of Work Force Services.*

In the final quarter of 2013, all five counties in southwest Utah finally managed year-to-year job growth, of course, some counties fared better than others. Washington County continues to show the most robust and consistent expansion followed surprisingly by Beaver County. Job growth in Garfield, Kane and Iron County proved less exciting. However, at last all counties seem to be in recovery mode.

### **Beaver County**

The construction of green energy projects has played a major role in Beaver County's employment in recent years. Jobs expanded dramatically due to windfarm or geothermal plant construction only to contract at the completion of the projects. In the final quarter of 2013, construction employment hit the deflationary stage and its ballooning growth rates evaporated. However, the county still finds itself growing at a healthy rate. Several upcoming projects such as potash mining should continue to provide additional jobs for residents in the future. Between December 2012 and December 2013, Beaver County generated a net gain of more than 100 positions and posted a vigorous 4.8 percent uptick. While construction employment remained virtually unchanged, manufacturing, mining, retail trade and utilities all made significant job contributions.

Interestingly, U.S. Census Bureau population estimates for 2013 suggest that Beaver County's population actually decreased slightly from 2012 to 6,459 residents. More jobs and a smaller population translated into a lower unemployment rate. Despite a very minor uptick in March, at 3.8 percent, the unemployment rate remained below both the state and national figures and firmly in the realm of "full-employment. Just since March of 2012, the county's jobless rate decreased by more than half a percentage point. First-time claims for unemployment insurance also show persistently low levels. In addition, gross taxable sales jumped up by a whopping 57 percent between the fourth quarters of 2012 and 2013. Just as with construction employment, large projects have generated notable levels of business investment expenditures in Beaver County.

### **Garfield County**

Garfield County's economy continued to limp along in the final quarter of 2013. However, the county did generate its first year- to-year employment gain in nine months. Yet, the 0.3 percent, five job increase between December 2012 and December 2013 is hardly worth mentioning. The labor market will need to generate stronger employment additions before it can be pronounced economically fit. December figures may mark the first step towards improved economic health.

Despite the county's overall weak economic showing, healthcare/social services and the county's largest industry, leisure/hospitality services, created roughly 20 jobs each. Inopportunately, minor losses in other industries (construction, manufacturing, trade and federal/local government) combined to nearly offset the aforementioned gains. Garfield County's less than vigorous expansion in the jobs arena, explains its virtually stagnant jobless rate. The unemployment rates for both March 2012 and March 2013 measured 9.2 percent. As usual, Garfield County's very seasonal economy resulted in one of the highest jobless rates in the state. The county's immobile seasonally adjusted unemployment rate echoes the numbers of initial claims for unemployment insurance which have settled back into their very seasonal pattern. Recently released population estimates from the U.S. Census Bureau show Garfield County with a declining population base. Job losses of the past several years may have spurred workers to leave the county. Garfield County's 2013 population estimate of 5,083 reflects net out-migration of more than 200 individuals over the past three years.

Gross taxable sales rounded out the county's lackluster economic indicators. Between the fourth quarters of 2012 and 2013, sales dropped by roughly 6 percent.

### **Kane County**

Kane County ended 2013 with a rate of job growth of 1.5 percent. While the 40-job, December-to-December gain might not seem particularly thrilling, the county has shown expansion in 16 of the last 18 months. This relatively slow-and-steady trend suggests the county is gradually expanding and improving and should continue to do so. Between December 2012 and December 2013, retail trade generated the largest number of net, new jobs. In addition, financial activities, healthcare/social services and leisure/hospitality services all contributed new employment. However, a drop in local government jobs put a drag on the county's overall gains. For the most part, Kane County's unemployment rate has been trending downward with just a slight uptick in recent months. However, initial claims for unemployment insurance have remained at a very low, seasonal level. At 5.5 percent, the county's March unemployment rate measured just slightly lower than it did a year ago. The U.S. Census Bureau recently released population estimates for 2013 which show a declining population base for the area. Fewer workers needing jobs coupled with an improved job market have kept the county's unemployment edging downward. Despite some improvements for Kane County, gross taxable sales decreased by 5.8 percent between the fourth quarters of 2012 and 2013. This decline was generally precipitated by a decline in non-store retailer sales.

### **Washington County**

Washington County rang in another quarter with job growth in the 5 percent range, marking two full years of strong employment expansion in Utah's Dixie. In addition to this "soft landing," anticipated additions to the county's employment base should continue to buoy up Washington County's numbers in the months ahead. In December 2013, Washington County's year-to-year employment gain clocked in at 5 percent, representing a net increase of roughly 2,500 jobs. Leisure/hospitality services and construction ran neck and neck in the race for top job gain honors. In addition, retail trade, government (including public education) and healthcare/social services all added notable numbers of new positions.

In past months, most industries grew or showed only minor declines. However, in a departure from that trend, one major industry did show a significant decline. Professional/scientific/technical services took a 240 job hit. Fortunately, growth elsewhere more than counterbalanced this loss. With a steady influx of new jobs, it should come as no surprise that Washington County's unemployment rate continues to decline. According to recently released population estimates from the U.S. Census Bureau, Washington County has seen strong net in-migration in recent years and its jobless rate drops still. In March 2013, the county's jobless rate stood at 4.7 percent—almost a full percentage point lower than a year earlier. Gross taxable sales chimed in to round out the glowing picture of Washington County's economy. Between the fourth quarters of 2012 and 2013, sales increased by almost 10 percent marking the county's twelfth straight quarterly gain.

### **Iron County**

After a brief slip into negative territory in September, Iron County navigated itself back to job growth in the final quarter of 2014. Despite a rather disappointing recovery, the county finally seems poised to move toward stronger expansion. Year-to-year growth rates are remained relatively low—only 1.6 percent in December 2013. Fortunately, anticipated manufacturing hiring and an improved construction scene should help Iron County achieve full-fledged expansion in the months ahead.

Between December 2012 and December 2013, Iron County generated almost 260 net, new jobs. Construction and healthcare/social services created the most new jobs with a little help from a reviving manufacturing sector, retail trade, and leisure/hospitality services. The only major employment declines occurred in the public sector with federal, state and local entities all exhibiting job losses. Although Iron County is relatively new to employment gains, its unemployment rates have consistently trended downward. In March 2014, the county's jobless rate stood at 4.8 percent, down a full percentage point from the previous year. Recent population estimates from the U.S. Bureau of the Census show a stream of net out-migration over the past four years which suggests that unemployed workers have left the area. First-time claims for unemployment insurance have certainly mellowed back to their tradition seasonal pattern and show no sign of economic distress. Gross taxable sales sustained their strong track record as 2013 came to a close. Between the fourth quarters of 2012 and 2013, Iron County sales increased by almost 11 percent. County sales have shown strong growth since the second quarter of 2011.

## **Recent Migration in Southwest Utah**

*BY LECIA LANGSTON, Regional economist for southwest Utah, and the Utah Department of Work Force Services.*

Moving residences is a relatively common occurrence in southwest Utah. The U.S. Census Bureau recently released 2013 population figures providing estimates of migration's role in population change. In addition, County to- County Migration Flows tables collected from the American Community Survey track the yearly movements of individuals between 2007 and 2011.

### **Births, Deaths and Migration**

Population change results from the intricate interaction between births, deaths and net migration. Births minus deaths results in natural increase. All counties in southwest Utah showed positive natural increase according to the Census Bureau's 2013 population estimates. Iron, with its abundance of college students and Beaver counties exhibited the highest rates of natural increase per 1,000 population in Southwest Utah during 2013.

The other major component of population change, net migration, is an estimate of the difference between the number of individuals moving into an area and the number of individuals moving out. In southwest Utah, only Washington and Kane counties showed positive net migration estimates for 2013. Washington County's population increased by 2.2 percent—the highest growth rate among the state's metropolitan counties.

Moreover, Washington County was one of only two counties in Utah where net in-migration outpaced natural increase. On the other hand, Kane County's in-migration was so low that net migration proved a virtual draw and constrained its overall population growth.

In Iron County, net out-migration essentially canceled out natural increase leaving the county with essentially no population change at all between 2012 and 2013. In Beaver and Garfield counties, net out-migration measured higher than natural increase. Both counties showed declining population estimates in 2013.

### **Moving Where?**

According to the American Community Survey, a whopping 19 percent of the population experienced a yearly move in Southwest Utah between 2007 and 2011, although margins of error may be large for small counties.

Counties in southwest Utah with large college student populations tended to show the highest of percentages of population changing residences. Note that both Iron and Washington counties displayed moving rates of roughly 20 percent during the 2007-2011 time period. Beaver, Garfield and Kane counties exhibited moving rates roughly half the level of the two largest counties in the region. These three smaller counties also showed a higher number of out-migrants than in-migrants during the surveyed years.

Most movers in southwest Utah changed new residences within the same county. Individuals moving across county lines tended to stay within the state at just a slightly higher rate than those who moved out of state. On the other hand, movers to the southwest area were slightly more likely to have originated in another state rather than in another county in Utah.

Not surprisingly, counties along the Wasatch Front seemed the most likely destination for southwestern movers changing county residences within the state. In particular, Utah and Salt Lake counties absorbed the highest number of transplants from southwest Utah. Migrating individuals also showed a propensity to move to neighboring counties. In particular, Iron and Washington county residents traded places to a noticeable degree.

When crossing state lines, movers from southwest Utah were disposed to reside in neighboring states. Nevada, Arizona and California appeared the most common moving destinations. In-migration to the area showed a wider variety of sources than did the destinations of out-migration. Washington and Millard counties contributed most heavily to Beaver County's in-migration.

Interestingly, both Oregon and Nevada contributed heavily to Garfield County's out-of-state in-migrants while from within Utah, the highest number of movers originated in Emery County. The largest number of in-migrants to Iron County just crossed the border from Washington County, although Clark County, Nevada (home to Las Vegas) ran a close second.

California was also a major source of Iron County in-migration between 2007 and 2011. Ironically, Iron County provided the largest source of new residents for Kane County. A notable number of in-migrants also moved from Nevada and nearby Arizona. Utah, Salt Lake, Iron and Clark (Nevada) counties also provided Washington County's largest number of new residents between 2007 and 2011.

## **I. REGIONAL HAZARDS and MITIGATION**

### **Natural Hazard Mitigation Plan 2010-2014**

The Five County Natural Hazard Mitigation Plan compiles data for nine natural hazards and establishes mitigation goals and activities.

Conducting a hazard assessment can provide information on the location of the hazard, the value of existing land and property in the hazard location, and an analysis of risk to life, property and the environment that may result in a natural hazard event. Specifically, the three levels of hazard assessment are:

1. Hazard Identification identifies the geographic context of the hazard, the intensity of the hazard, and the probability of its occurrence. Maps are frequently used to display hazard identification data.

2. Vulnerability Assessment combines hazard identification with an inventory of the existing property and population exposed to a hazard.
3. Risk Analysis involves estimating the damage, injuries, and financial losses likely to be sustained in a geographic area over a given period of time.

### **Chronic Natural Events**

Chronic hazards occur with some degree of frequency and include flooding, landslides, severe weather, wildfires, problem soils, drought, and radon gas. These hazards impact communities with devastating economic consequences. The following is a summarization of natural hazard events occurring in the Five County region.

### **Flooding**

In the southwest, as elsewhere, flooding, erosion, and sediment discharge are responsible for loss of life, land, and infrastructure, along with damage to reservoirs and natural habitats. Stream flooding is the most prevalent and destructive (annually) of the geologic hazards that affect Utah. This destructive trend is nowhere more evident than in the southwest part of the state.

On January 20, 2011, Governor Gary R. Herbert requested a major disaster declaration due to severe winter storms and flooding during the period of December 20-24, 2010. The Governor requested a declaration for Public Assistance for two counties and Hazard Mitigation statewide. During the period of January 12-14, 2011, joint Federal, State, and local Preliminary Damage Assessments (PDAs) were conducted. PDAs estimate damages immediately after an event and are considered, along with several other factors, in determining whether a disaster is of such severity and magnitude that effective response is beyond the capabilities of the State and the affected local governments, and that Federal assistance is necessary.

On February 11, 2011, President Obama declared that a major disaster exists in the State of Utah. That declaration authorized assistance for debris removal and emergency protective measures under the Public Assistance program as a result of severe winter storms and flooding in Kane and Washington Counties.

The primary damage from the flooding event was to roads and bridges, but also had significant effect on previous bank armoring installed after the 2005 flooding event.

During the period of April 28, 2005 until June 29, 2005, frequent rainfall events, warm spring temperatures, and abundant snowpack melting at accelerated rates resulted in significant flooding and numerous landslide events in nine Utah Counties and two Indian Reservations. As pertaining to this region, Beaver, Iron and Kane counties experienced damages when large peak discharges, as a result of near record snowpacks, were encountered in the Sevier River basin. This resulted in substantial damage to public and private property. A Presidential Disaster Declaration was declared on August 1, 2005.

A stalled storm system containing abundant moisture caused significant flooding in Washington and Kane Counties between January 8-12, 2005. Higher snowfall and water equivalent totals equaled 70" at Cedar Breaks, and 60" at Kolob-Zion National Park. It is estimated that \$300 million dollars in damages was sustained along the Santa Clara and Virgin Rivers. 30 homes were destroyed in the flood and another 20 homes were significantly damaged(NCDC, 2005). One fatality associated with

this event resulted when a man and his wife in their vehicle were caught in floodwaters in the Red Cliff Recreation Area near the Quail Creek Reservoir. Six other injuries were reported. A Presidential Disaster Declaration was declared on February 1, 2005.

The Quail Creek Dam, located in Washington County, failed in the early hours of January 1, 1989. In the months prior to the failure, leakage of the dam was the result of the solubility of the gypsum in the soil, which dissolved some of the mechanisms used to transport water. Water released by this dam failure entered the Virgin River and destroyed a bridge on Utah 9 in Hurricane. Failure of the dam resulted in losses to agriculture, livestock, public facilities, roads, bridges, and golf courses. Additionally, 30 homes, 58 apartments and 9 businesses were flooded. Estimates placed the total damage at \$11,959,732.

In 1984 statewide flooding occurred which resulted in serious property damage in the Five County region. As a result of greater than average snow pack and above normal precipitation, the Beaver River, near Beaver City, flooded on May 24, 1984. The flooding resulted in property damages estimated at \$2,380,952.

### **Landslide**

Nationwide, estimated losses from damaging landslides equal \$3.5 billion annually (USGS, 2005). In Utah, documented losses from damaging landslides in 2001 exceeded \$3 million, including the costs to repair and stabilize hillsides along state and federal highway (Ashland, 2003). Total landslide dollar losses are hard to determine from past events because a standard for documenting them do not exist. Several state and local agencies track landslide losses with inconsistent formats often resulting in several different totals for a single event.

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On March 12, 2005 a 100 ft. long by 60 ft. high vertical stream-cut along Kanab Creek failed. This rock fall occurred within the city limits of Kanab, killing one boy and partially burying two children. This earth-fall type landslide was most likely the result of long-term gravitational effects on over-steepened, unconsolidated material in the arroyo walls (Lund, 2005).

### **Severe Weather**

The term severe weather, as it pertains to this plan, is used to represent a broad range of weather phenomena which affect southwestern Utah, namely; downburst, lightning, heavy snowstorms, avalanches, and tornados. Severe weather events are the most deadly type of natural hazard in Utah. Interestingly, more people have died in avalanches in Utah than by any other natural hazard. Between 1958 and 2006 avalanches killed 85 people.

Since 1950, lightning has killed 60 people statewide and injured another 144. In southwestern Utah the most common type of severe weather activity is related to lightning. Since 1950 a total of 5 lightning deaths and 10 lightning injuries have been recorded within the region.

A tornado is a violently rotating column of air extending from a thunderstorm to the ground. Most tornados have winds less than 112 miles per hour and zones of damage less than 100 feet wide. According to the National Weather Service, a total of 12 tornados have been observed in southwestern Utah. Of this amount, Iron and Beaver counties contain the highest amounts at 5 and 4 respectively.

### **Wildfire**

When discussing wildfires it is important to remember that fires are part of a natural process and are needed to maintain a healthy ecosystem. Since its settlement in the mid 1800s, the region and its residents have been subject to the annual threat of wildfire. This is in large part due to the environmental conditions, namely low annual precipitation and high amount of public lands. Lightning is the primary cause of wildfire in the Five County region. However, the potential risk for human caused fires increases as more people move into the wildland urban interface.

Many of Utah's wildland urban interface areas are located in the most fire prone wildland fuels. Generally, these fuels are found on drier, lower elevation sites which are often very desirable for real estate development. To address these issues, a multi-jurisdictional group of agencies, organizations, and individuals collaborated to develop the Southwest Utah Regional Wildfire Protection Plan (October 2007). The purpose of this plan is to be a tool in the effort to protect human life and reduce property loss due to catastrophic wildland fires in the communities and surrounding areas located in the southwest Utah counties of Beaver, Garfield, Iron, Kane and Washington. Specific hazard identification, assessment of vulnerability, and mitigation measures will be provided in each respective County specific chapter found within this NHMP.

### **Problem Soils**

Humans have no influence on the distribution of problem soil and rock, but their activities are often adversely affected by them. As a result, urbanized areas of southwestern Utah are susceptible to damage from these deposits. As development encroaches on less suitable terrain, damage from problem soil and rock has, and will increase. Detailed geotechnical studies are needed in areas of problem soil and rock to identify and mitigate potential problems, and avoid costly corrective measures. Six types of problem soil and rock are present in southwestern Utah.

Expansive soil and rock is the most extensive. Most expansive soil problems are related to bentonitic shales near St. George.

Collapsible soil has caused extensive damage in and around Cedar City. Holocene alluvial fan and debris flow deposits are the sources of collapsible soil in southwestern Utah. Soil and rock containing gypsum are also susceptible to subsidence. Ground water and introduced waters from irrigation dissolve gypsum causing subsidence.

Limestone susceptible to dissolution and subsidence occurs south of St. George. Structures have not been damaged by ground collapse or subsidence related to limestone karst, but because karst ground-water systems have little filtering capacity, contamination of ground water is a major concern. In fine-grained Holocene incised by streams piping is a common problem. Collapse of soil pipes and subsequent erosion has damaged roads and agricultural land. Sand dunes in the Escalante Desert and west of Kanab can migrate across roads and bury structures in areas where active dunes are present. (Excerpted from Lund, UGS unpublished information)

## Drought

Drought information in Southwest Utah is based upon the Palmer Drought Severity Index Chart. The Palmer Index was developed by Wayne Palmer in the 1960s and uses temperature and rainfall information in a formula to determine dryness – it has become the semi-official drought index used today. The Palmer Index is most effective in determining long term drought. The advantage of Palmer Index is that it is standardized to local climate, so it can be applied to any part of the country to demonstrate relative drought or rainfall conditions. The negative is that it is not as good for short term forecasts, and is not particularly useful in calculating supplies of water locked up in snow (NOAA's Drought Information Center).

There are four Climate Divisions in Southwest Utah based: Division 1 – Western, Division 2 – Dixie, Division 4 – South Central, and Division 7 – Southeast.

**Division 1-** The Western Division comprises 4,290 square miles or 24% of the total land area of the Five Counties, and is found in the western parts of Beaver, Iron, and Washington counties. Historically the Western Division has followed a drought pattern of normal to wet for 20 years, then having a severe to extreme drought problem that persist for six or seven years. However, 17 of the last 20 years have been severe to extreme drought.

**Division 2-** The Dixie Division comprises 1,423 square miles or 8% of the total land area of the Five Counties, the majority is found in Washington County with a small portion found in Kane County. Dixie Division has had three major drought periods since 1895, with the third one currently happening. The last two lasted at least seven years each and were about 50 years apart.

**Division 4-** The South Central Division comprises 9,097 square miles or 52% of the total land area of the Five Counties. The South Central Division is found in all five counties, mainly found in the central part of the Five Counties. The South Central Division has been pretty consistent throughout the 100+ years of record keeping. Until the mid 60's there has been a period of drought every 20 years on average, after the mid 60's the droughts have been more frequent, primarily every 10 to 15 years.

**Division 7-** The Southeast Division comprises 2,813 square miles or 16% of the total land area of the Five Counties. The Southeast Division is found in the eastern half of Kane and Garfield counties. The Southeast Division had an eight year drought just as the other divisions did. Between 1896 to 1904 it was in the extreme part of the index. After this long extreme drought there were basically fifty years of normal to wetter than normal years followed by a four year 5-8 Identifying Hazards | Five County Association of Governments drought in the mid-fifties. Since the drought in the mid-fifties there has been a two to three year extreme drought every 10 to 13 years.

In summary, the drought history of the four different divisions in the Five County area has been very similar, with the exception of the Southeast division. The Southeast Division is a bit different than the other Divisions, instead of a longer period in-between a drought and then followed with a drought lasting between five to eight years; the Southeast has a shorter period in between a drought and the droughts are only 2 to 3 years long. As of February 2010, the Five County region as a whole is categorized as “Abnormally Dry” and “Drought-Moderate”. In regards to drought intensity, both of these categorizations are at the lower end of the spectrum.

## **Radon Gas**

Radon is a radioactive gas of geologic origin that is found in many buildings in sufficient concentrations to represent a health hazard to building occupants. Radon is an odorless, tasteless, and colorless radioactive gas which forms as a product in three radioactive decay series. Most common of these is the uranium-decay series. In nature, radon is found in small concentrations in nearly all rocks and soils. Potential radon-hazard areas in southwestern Utah are widespread, and are generally underlain by silicic igneous rocks of low-grade metasedimentary deposits.

Surveys conducted by the Utah Department of Environmental Quality/Division of Radiation Control indicate that 20% of homes in Utah are at concentrations above the U.S. Surgeon General's guidance of 4.0 pCi/L. Despite this relative high percentage, radon gas remediation is relatively simple and inexpensive. However, it can become a laborious process because the only way to know if a building is subject to radon hazard is for that building to be tested.

## **Catastrophic Natural Hazard Events**

Catastrophic events do not occur with the same frequency as chronic hazards, but can have devastating consequences. Earthquakes and volcanoes are two types of catastrophic hazards. These types of natural hazards are difficult to predict, affect a wide geographic area, and can severely impact entire regions.

## **Earthquake**

In Utah most earthquakes are associated with the Intermountain seismic belt (Smith and Sbar, 1974; Smith and Arabasz, 1991), an approximately 160-kilometer-wide (100 miles), north-south trending zone of earthquake activity that extends from northern Montana to northwestern Arizona. Since 1850, there have been at least 16 earthquakes of magnitude 6.0 or greater within this belt (Eldredge and Christenson, 1992

In an average year Utah experiences more than 700 earthquakes, but most are too small to be felt. Moderate magnitude (5.5 – 6.5) earthquakes happen every several years on average, the most recent being the magnitude 5.8 St. George earthquake on September 2, 1992. Large magnitude earthquakes (6.5 – 7.5) occur much less frequently in Utah, but geologic evidence shows that most areas of the state within the Intermountain seismic belt, including southwestern Utah, have experienced large surface-faulting earthquakes in the recent geologic past.

Fault-related surface rupture has not occurred in southwestern Utah historically, but the area does have a pronounced record of seismicity. At least 20 earthquakes greater than magnitude 4 have occurred in southwestern Utah over the past century (Christenson and Nava, 1992); the largest events were the estimated magnitude 6 Pine Valley earthquake in 1902 (Williams and Trapper, 1953) and the magnitude 5.8 St. George earthquakes in 1992 (Christenson, 1995). The Pine Valley earthquake is pre-instrumental and poorly located, and therefore, is not associated with a recognized fault. However, the epicenter is west of the surface trace of the Hurricane fault, so the event may have occurred on that structure. Pechmann and others (1995) have tentatively assigned the St. George earthquake to the Hurricane fault. The largest historical earthquake in nearby northwestern Arizona is the 1959 Fredonia, Arizona, earthquake (approximate magnitude 5.7; DuBois and others, 1982). Since 1987 the northwest part of Arizona has been quite seismically active (Pearthree and others, 1998), experiencing more than 40 events with magnitudes >2.5.

Despite the lack of an historical surface-faulting earthquake in southern Utah, available geologic data for faults in the region indicate a moderate rate of long-term Quaternary activity. Mid-

Quaternary basalt flows are displaced hundreds of meters at several locations and alluvial and colluvial deposits are displaced meters to tens of meters in late Quaternary time.

Because earthquakes result from slippage on faults, from an earthquake-hazard standpoint, faults are commonly classified as active, capable of generating damaging earthquakes, or inactive, not capable of generating earthquakes. The term “active fault” is frequently incorporated into regulations pertaining to earthquake hazards, and over time the term has been defined differently for different regulatory and legal purposes.

### **Volcanism**

The active volcanic centers in the southwestern district area include the Escalante Deserts in the Basin and Range Province; the High Plateaus and adjacent areas in the Colorado Plateau Province; and the Pine Valley Mountains-St. George Basin and surrounding areas. The youngest vents and flows in southwestern Utah are less than 1,000 years old. Remote eruptive centers present Utah’s most imminent and potentially damaging volcanic hazard.

There has been caldera-type eruptive volcanic activity in southwestern Utah dated as occurring in the early Cenozoic period. As the geologic conditions that created those types of eruptions has long since disappeared there is zero chance of their repetition. The current hazard relating to volcanic activity is strictly limited to localized, small, cinder cone basaltic eruptions. According to geologists, the hazard is real, but extremely infrequent and would be limited to a relatively small area. Because of the remote potential of these volcanic events affecting the built environment, and threatening people, this hazard is not considered in the same vein as many other natural hazards.

## **J. ENVIRONMENT**

The following bullet-points section helps to answer environmental questions relating to the comprehensive Economic Development Strategies to the environmental baseline of the Five County region. Though the questions are not referenced verbatim they do directly correspond to those addressed in the Environmental Guidance for Grant Programs provided by the EDA, Department of Commerce as revised 07 March 2011.

*National, State Parks and Wildlife Refuges* -State or National Parks, National Monuments, National Conservation Areas, Congressionally Designated High Desert ATV Trail System, Forest Service, National Recreation Area. Five County AOG economic development planners regularly coordinate with several Utah State Parks and National Parks to identify economic development opportunities and to reduce placing strains on these resources. State and National Parks in the district area include the following:

### **Utah State Parks:**

Anasazi State Park Museum  
Coral Pink Sand Dunes State Park  
Escalante Petrified Forest Stat Park  
Frontier Homestead Stat Park  
Gunlock State Park  
Otter Creek State Park  
Quail Creek State Park  
Snow Canyon State Park  
Sand Hollow State Park

**National Parks:**

Zion National Park  
Bryce Canyon National Park  
Capitol Reef National Park

**National Monuments:**

Grand Stair-Case National Monument  
Cedar Breaks National Monument

**National Conservation Areas:**

Beaver Dam Wash National Conservation Area  
Red Cliff's National Conservation Area

**Congressionally Designated High Desert ATV Trail System:**

Designated in Washington County, and proposed route through Iron and Beaver Counties eventually connecting to the Piute ATV trail system, and the Silver State ATV system in Nevada.

**National Recreation Area:**

Glenn Canyon National Recreation Area –Lake Powell

**Forest Service:**

Dixie National Forest  
Fish Lake National Forest  
Brian Head Ski Resort  
Eagle Mountain Ski Resort

**Wilderness Area Designations**

Designated or proposed wilderness under the Wilderness Act  
In Washington County in the 2009 Omnibus Public Lands Bill, Congress designated 15 wilderness areas and released all remaining Wilderness Study Areas from study.

RELEASE OF WILDERNESS STUDY AREAS.—

(1) FINDING.—Congress finds that, for the purposes of section 603 of the Federal Land Policy and Management Act of 1976 (43 U.S.C. 1782), the public land in the County administered by the Bureau of Land Management has been adequately studied for wilderness designation.

(2) RELEASE.—Any public land described in paragraph (1) that is not designated as wilderness by subsection (a)(1)— (A) is no longer subject to section 603(c) of the Federal Land Policy and Management Act of 1976 (43 U.S.C. 1782(c)); and (B) shall be managed in accordance with applicable law and the land management plans adopted under section 202 of that Act (43 U.S.C. 1712).

**Congressionally Designated Wilderness:**

Beaver Dam Mountains 2,700 acres  
Canaan Mountain 44,500 acres  
Deep Creek/Deep Creek North 7,500 acres  
Red Butte 1,500 acres  
Bear Trap Canyon 40 acres  
Cougar Canyon/ Doc's Pass/Slaughter Creek 31,600 acres  
Goose Creek 98 acres  
Red Mountain 18,700 acres  
Blackridge 13,000 acres  
Cottonwood Canyon 11,700 acres  
La Verkin Creek 445 acres  
Taylor Creek 32 acres  
Zion National Park 124, 406 acres

Ashdown Gorge 7,043 acres  
Box-Death Hollow 25,751 acres  
Cottonwood Forest 2,620 acres  
Pine Valley Mountain 50, 232 acres

**Wilderness Study Areas:** Are on federal lands waiting for Congress to make a decision on wilderness designation.

White Rock Range WSA proposed acreage 3,767  
Spring Creek Canyon WSA proposed acreage 4, 333  
North Fork Virgin River WSA proposed acreage 1,080  
Orderville Canyon WSA proposed acreage 1,952  
Paranuweap Canyon WSA proposed acreage 30, 907  
Moquith Mountain WSA proposed acreage 15, 249  
King Top WSA proposed acreage 92, 847  
Wah Wah Mountains WSA proposed acreage 49,429  
Paria Hackberry WSA proposed acreage 145,828  
Cockscomb WSA proposed acreage omitted from Bureau of Land Management map  
Wahweap Mountains WSA proposed acreage 144,268  
Mud Spring Canyon WSA proposed acreage 40, 573  
The Blues WSA proposed acreage 19, 416  
Carcass Canyon WSA proposed acreage 48,628  
Death Ridge WSA proposed acreage 66,286  
Burning Hills WSA proposed acreage 65,710  
Fifty Mile Mountain WSA proposed acreage 160,833  
Scorpion WSA proposed acreage 37,319  
Devils Garden WSA proposed acreage 633  
Escalante Canyons Tract 1 WSA proposed acreage 761  
North Escalante Canyons WSA proposed acreage 127,459  
Phipps Death Hollow WSA proposed acreage 45,328  
Steep Creek WSA proposed acreage 23,978

### **Wild or scenic rivers under the Wild and Scenic Rivers Act**

The state of Utah has approximately 81,899 miles of rivers in the state, of which 169.3 miles are designated as wild & scenic— this is  $2/10^{\text{ths}}$  of 1% of the state's river miles.

Through the Omnibus Public Lands Management Act of 2009 (P.L. 111-11), Congress designated approximately 170 miles of the Virgin River in southwestern Utah and its tributaries across federal land within Zion National Park (28 segments) and adjacent Bureau of Land Management Wilderness (11 segments), as part of the National Wild and Scenic Rivers System.

Over the course of 13 million years, the Virgin River has carved through the red sandstones of Zion National Park to create some of the most unforgettable scenery in the National Park System. In fact, this very act of natural erosion is responsible for "The Narrows," which is one of the premiere hiking adventures in the United States, possibly the world. In addition, there are several easy trails along the river.

Despite the obvious evidence of the erosive force of the river, the river itself winds peacefully through the canyon. Natural river processes proceed unimpeded, allowing for seasonal flooding and meander migration, vegetative recruitment and plant succession.

The corridor includes populations of desert bighorn sheep, Mexican spotted owl and the endemic Zion snail and exemplary riparian corridors and rare plant communities. Cottonwoods and willows along the banks provide shade of hikers and hiding spots for mule deer and numerous bird species. Other wildlife, such as ringtail cats, bobcats, foxes, rock squirrels and cottontail rabbits rest in the rocky hiding places carved in the sandstone. As the heat of the day yields to the cool of the desert night, look for the many animals drawn to the river to emerge to get on with their lives.

The Virgin River system contains some of the best examples in the region of prehistoric American Indian sites that provide a tangible connection between culturally associated tribes and their ancestors.

Of the designated miles of the Virgin River the classification is as follows: Wild — 145.4 miles; Scenic — 11.3 miles; Recreational — 12.6 miles; Total — 169.3 miles. The managing federal agencies for the designated reaches of the Virgin River are the Bureau of Land Management, St. George Field Office and the National Park Service, Zion National Park. Because of the isolated location of the reaches of the designated river segments there are no impacts anticipated to those segments by any future economic development projects in the Five County Economic Development District. Nonetheless, the EDD will coordinate with the managing federal agencies any proposed economic development projects that are within the Virgin River watershed drainage areas of the Virgin River upstream of the designated segments.

### **Endangered or threatened species under the Endangered Species Act**

This list includes both current and historic records. (List was updated on January 12, 2012 by the Utah Division of Wildlife Resources).

#### **Beaver County**

<b>Common Name</b>	<b>Scientific Name</b>	<b>Status*</b>
Greater Sage-grouse	<i>Centrocercus urophasianus</i>	C
Utah Prairie-dog	<i>Cynomys parvidens</i>	T
Least Chub	<i>Iotichthys phlegethontis</i>	C
Ostler Peppergrass	<i>Lepidium ostleri</i>	C
Frisco Clover	<i>Trifolium friscanum</i>	C
Frisco Buckwheat	<i>Eriogonum soredium</i>	C

#### **Garfield County**

<b>Common Name</b>	<b>Scientific Name</b>	<b>Status</b>
Ute Ladies'-tresses	<i>Spiranthes diluvialis</i>	T
Jones Cycladenia	<i>Cycladenia humilis var jonesii</i>	T
Autumn Buttercup	<i>Ranunculus aestivalis</i>	E
Humpback Chub	<i>Gila cypha</i>	E
Bonytail	<i>Gila elegans</i>	E
Colorado Pikeminnow	<i>Ptychocheilus lucius</i>	E
Greater Sage-grouse	<i>Centrocercus urophasianus</i>	C
Mexican Spotted Owl	<i>Strix occidentalis lucida</i>	T
Utah Prairie-dog	<i>Cynomys parvidens</i>	T
Brown (Grizzly) Bear	<i>Ursus arctos</i>	T (extirpated)

### Iron County

<u>Common Name</u>	<u>Scientific Name</u>	<u>Status</u>
Least Chub	<i>Iotichthys phlegethontis</i>	C
Greater Sage-grouse	<i>Centrocercus urophasianus</i>	C
Yellow-billed Cuckoo	<i>Coccyzus americanus</i>	C
Mexican Spotted Owl	<i>Strix occidentalis lucida</i>	T
Utah Prairie-dog	<i>Cynomys parvidens</i>	T
Brown (Grizzly) Bear	<i>Ursus arctos</i>	T (extirpated)

### Kane County

<u>Common</u>	<u>Name Scientific Name</u>	<u>Status</u>
Welsh's Milkweed	<i>Asclepias welshii</i>	T
Kodachrome	Bladderpod <i>Lesquerella tumulosa</i>	E
Siler Pincushion Cactus	<i>Pediocactus sileri</i>	T
Jones Cycladenia	<i>Cycladenia humilis</i> var <i>jonesii</i>	T
Kanab Ambersnail	<i>Oxyloma kanabense</i>	E
Coral Pink Sand Dunes Tiger Beetle	<i>Cicindela limbata albissima</i>	C
Humpback Chub	<i>Gila cypha</i>	E
Bonytail	<i>Gila elegans</i>	E
Greater Sage-grouse	<i>Centrocercus urophasianus</i>	C
Mexican Spotted Owl	<i>Strix occidentalis lucida</i>	T
Southwestern Willow Flycatcher	<i>Empidonax traillii extimus</i>	E
Utah Prairie-dog	<i>Cynomys parvidens</i>	T

### Washington County

<u>Common Name</u>	<u>Scientific Name</u>	<u>Status</u>
Siler Pincushion Cactus	<i>Pediocactus sileri</i>	T
Shivwits or Shem	Milkvetch <i>Astragalus ampullarioides</i>	E
Holmgren Milkvetch	<i>Astragalus holmgreniorum</i>	E
Gierisch Mallow	<i>Sphaeralcea gierischii</i>	C
Dwarf Bearclaw-poppy	<i>Arctomecon humilis</i>	E
Virgin Chub	<i>Gila seminuda</i>	E
Woundfin	<i>Plagopterus argentissimus</i>	E
Relict Leopard Frog	<i>Rana onca</i>	C (extirpated)
Desert Tortoise	<i>Gopherus agassizii</i>	T
Greater Sage-grouse	<i>Centrocercus urophasianus</i>	C
Yellow-billed Cuckoo	<i>Coccyzus americanus</i>	C
Mexican Spotted Owl	<i>Strix occidentalis lucida</i>	T
Southwestern Willow Flycatcher	<i>Empidonax traillii extimus</i>	E
Utah Prairie-dog	<i>Cynomys parvidens</i>	T
Gray Wolf	<i>Canis lupus</i>	E
Brown (Grizzly) Bear	<i>Ursus arctos</i>	T (extirpated)

**\* Status Key:** Threatened (T), Endangered (E), and Candidate (C) Species

### DEFINITIONS

**E:** A taxon that is listed by the U.S. Fish and Wildlife Service as “endangered” with the probability of worldwide extinction.

**T:** A taxon that is listed by the U.S. Fish and Wildlife Service as “threatened” with becoming endangered.

**C:** A taxon for which the U.S. Fish and Wildlife Service has on file sufficient information on biological vulnerability and threats to justify it being a “candidate” for listing as endangered or threatened.

**extirpated:** An “endangered,” “threatened,” or “candidate” taxon that is “extirpated” is considered by the U.S. Fish and Wildlife Service to no longer occur in Utah.

**taxon:** a taxonomic category, as a “species” or “genus”

Projects proposed for economic development funding will be consulted and vetted with the Utah Division of Wildlife Resources and/or the Utah Field Office of the U.S. Fish and Wildlife Service to determine whether the project will have any significant impact on any listed or candidate species.

### **Prime/unique agricultural lands designated by the U.S. Department of Agriculture**

There are no unique lands identified in our region, however there are prime farmlands in four categories by county and acreage:

Farmland of state-wide importance, if irrigated				
<b>Beaver</b>	<b>Garfield</b>	<b>Iron</b>	<b>Kane</b>	<b>Washington</b>
41,102	16,508	173,016	75,230	10,223
Prime farm land if irrigated				
23,353	53,636	80,600	34,593	79,262
Prime farm land if irrigated & drained				
3,872				
Prime farm land if irrigated & reclaimed				
1,069				
<i>County Totals</i>				
<b>68,327</b>	<b>70,144</b>	<b>254,685</b>	<b>109,823</b>	<b>89,485</b>

### **Superfund, Comprehensive Environmental Response**

According to the Environmental Protection Agency web site <http://www2.epa.gov/region8/utah-cleanup-sites> checked on September 29, 2014, there are no Superfund Cleanup Sites located anywhere in the five southwestern counties of Beaver, Garfield, Iron, Kane or Washington County. The EPA web site <http://www.epa.gov/enviro/facts/cerclis/search.html> was searched on September 29, 2014 and no CERCLA sites were identified in Beaver, Garfield, Iron and Kane counties. That site did list three CERCLA sites in Washington County. Those are:

<u>Site Name:</u>	<u>EPA CERCLIS ID #</u>	<u>Location</u>	<u>GPS Coordinates</u>
OMG APEX	982589848	Near Shivwits	Lat.: 37.11504; Long.: -113.5168
PIONEER 3-STAMP MILL	UTN010161078	Leeds, Utah	Lat.: 37.22721; Long.: -113.3756
SOUTHWEST ASSAY SITE	UTD988066239	North of Leeds, Utah	Lat.: 37.235927; Long.: -113.3630

### **Underground Storage Tanks**

The state of Utah Underground Storage Tank program is a regulatory branch of the Utah Department of Environmental Quality. Its primary goal is to protect human health and the environment from leaking underground storage tanks (USTs). The UST staff oversees: UST notification, installation, inspection, removal, and compliance with State and Federal UST regulations concerning release prevention and remediation.

As a result of the federal mandate, the State of Utah amended the Solid and Hazardous Waste Act in 1986 which established the Utah UST Program. UST owners and operators were required to register all USTs. In 1989, the Underground Storage Tank Act was enacted; it details the duties and responsibilities of the Director of the Division of Environmental Response and Remediation (DERR), the Solid and Hazardous Waste Control Board, and the Utah UST Program Authority. The act established the Petroleum Storage Tank (PST) Fund and provides certain requirements for UST owners and operators.

The UST section of the Utah Division of Environmental Response and Remediation is a group of environmental scientists whose task is to oversee the regulated public in issues that concern the operational life of USTs up to proper closing of UST systems. The UST staff has tracked about 15,000 USTs and currently regulates approximately 4,300 USTs at more than 1,500 different facilities. UST staff members perform compliance inspections, issue compliance notices, and serve as expert witnesses at administrative hearings. Outreach classes and seminars are taught throughout the state.

The Leaking Underground Storage Tank (LUST) section of DERR oversees remediation of contamination from USTs. LUST scientists and engineers review and reestablish clean-up guidelines. When responsible parties are not available or are unable to pay for the remediation of a LUST site, the LUST staff is required to define the degree of hazard, possibly take action with LUST-TRUST money to abate the hazard and remediate the site, and recover costs incurred from responsible parties. Often, responsible parties seek the guidance of the LUST staff to insure clean-up in a timely and economical fashion.

Economic development projects in this region will be vetted to determine whether they will be impacted by or contain underground storage tanks or leaking underground storage tanks.

### **Brownfields**

Brownfields are real property, the expansion, redevelopment or reuse of which may be complicated by the presence or potential presence of a hazardous substance, pollutant or contaminant. The EPA Region 8 Brownfields program provides funds and technical assistance to states, tribes, communities, and other stakeholders to assess, clean up and redevelop brownfields properties in the Rocky Mountain region, making it easier for such lands to become vital, functioning parts of their communities.

The Utah Department of Environmental Quality web site was searched and according to this report located at: [http://www.deq.utah.gov/EQERR/cercla/docs/2014/06Jun/VCPSiteList\(20\).pdf](http://www.deq.utah.gov/EQERR/cercla/docs/2014/06Jun/VCPSiteList(20).pdf) there are no brownfields located in the five counties of southwestern Utah.

*Hazardous chemical manufactures or users that store hazardous chemicals*--Planners in the Five County Association of Governments are aware of the hazardous chemical manufacturer AMPAC, Inc., a Subsidiary of American Pacific Corporation, in Cedar City, Iron County, Utah. AMPAC is a worldwide leader in the production of ammonium perchlorate (AP) and other perchlorate chemicals and derivatives. Economic planners are mindful of local, state, and federal regulations regarding safety, security, and community emergency preparedness surrounding this business and are respectful of the economic benefits and challenges posed by this organization.

## **Major manufactures or users of pesticides**

There are no major manufacturers of pesticides in our region. Major users of pesticides are Beaver County, Iron County, Kane County, Washington County, St George City, Hurricane City, Cedar City, and Kanab City.

## **Sole source aquifers for drinking water identified**

EPA defines a sole or principal source aquifer as an aquifer that supplies at least 50 percent of the drinking water consumed in the area overlying the aquifer. These areas may have no alternative drinking water source(s) that could physically, legally and economically supply all those who depend on the aquifer for drinking water. For convenience, all designated sole or principal source aquifers are referred to as "sole source aquifers" (SSAs).

Three Sole Source Aquifers have been designated in Utah. These are: Castle Valley Aquifer System near Moab, Utah; the Western Uinta Arch Paleozoic Aquifer System at Oakley, Utah; and the Glen Canyon Aquifer System in southeastern Utah. None of these are located in southwestern Utah.

## **Wellhead protection areas for protecting drinking water**

Many wells exist in the Five County region. Five County is most cognitive of these areas and mitigates concerns with any projects to assure that a project will not be located in or impact a wellhead protection area.

## **Nonattainment Ares for criteria pollutants under Clean Air Act**

There are currently no non-attainment areas in our region. Monitoring has indicated that Washington County could be classified as non-attainment for ozone should federal standards change. The other counties in our region are currently not threatened. However depending on how the federal standards change they could be threatened as well.

## **100-year flood plains and future development**

In the southwest, as elsewhere, flooding, erosion, and sediment discharge are responsible for loss of life, land, and infrastructure, along with damage to reservoirs and natural habitats. Stream flooding is the most prevalent and destructive (annually) of the geologic hazards that affect Utah. This destructive trend is nowhere more evident than in the southwest part of the state.

The two types of stream flooding events which typically occur in southwestern Utah are riverine floods and flash floods. Riverine floods are usually regional in nature, last for several hours or days, and have recurrence intervals of 25 to more than 100 years. They commonly result from the rapid melt of a winter snow pack or from periods of prolonged heavy rainfall. Flash floods result from thunderstorm cloudbursts. They are localized, quickly reach a maximum flow, and then quickly diminish. Recurrence intervals for flash floods are erratic, ranging from a few hours to decades or longer for a given drainage. Both types of flooding have caused extensive damage in southwestern Utah.

On January 20, 2011, Governor Gary R. Herbert requested a major disaster declaration due to severe winter storms and flooding during the period of December 20-24, 2010. The Governor requested a declaration for Public Assistance for two counties and Hazard Mitigation statewide. During the period of January 12-14, 2011, joint Federal, State, and local Preliminary Damage Assessments (PDAs) were conducted. PDAs estimate damages immediately after an event and are considered, along with several other factors, in determining whether a disaster is of such severity and magnitude that effective response is beyond the capabilities of the State and the affected local

governments, and that Federal assistance is necessary. On February 11, 2011, President Obama declared that a major disaster exists in the State of Utah. That declaration authorized assistance for debris removal and emergency protective measures under the Public Assistance program as a result of severe winter storms and flooding in Kane and Washington Counties.

The primary damage from the flooding event was to roads and bridges, but also had significant effect on previous bank armoring installed after the 2005 flooding event. During the period of April 28, 2005 until June 29, 2005, frequent rainfall events, warm spring temperatures, and abundant snowpack melting at accelerated rates resulted in significant flooding and numerous landslide events in nine Utah Counties and two Indian Reservations. As pertaining to this region, Beaver, Iron and Kane counties experienced damages when large peak discharges, as a result of near record snowpacks, were encountered in the Sevier River basin. This resulted in substantial damage to public and private property. A Presidential Disaster Declaration was declared on August 1, 2005.

A stalled storm system containing abundant moisture caused significant flooding in Washington and Kane counties between January 8 and January 12, 2005. Higher snowfall and water equivalent totals equaled 70" at Cedar Breaks National Monument, and 60" in the Kolob area of Zion National Park. It is estimated that \$300 million dollars in damages was sustained along the Santa Clara and Virgin Rivers. 30 homes were destroyed in the flood and another 20 homes were significantly damaged (NCDC, 2005). One fatality associated with this event resulted when a man and his wife in their vehicle were caught in floodwaters in the Red Cliff Recreation Area near the Quail Creek Reservoir. Six other injuries were reported. A Presidential Disaster Declaration was declared on February 1, 2005.

The Quail Creek Dam, located in Washington County, failed in the early hours of January 1, 1989. In the months prior to the failure, leakage of the dam was the result of the solubility of the gypsum in the soil, which dissolved some of the mechanisms used to transport water. Water released by this dam failure entered the Virgin River and destroyed a bridge on Utah 9 in Hurricane. Failure of the dam resulted in losses to agriculture, livestock, public facilities, roads, bridges, and golf courses. Additionally, 30 homes, 58 apartments and 9 businesses were flooded. Estimates placed the total damage at \$11,959,732.

In 1984 statewide flooding occurred which resulted in serious property damage in the Five County region. As a result of greater than average snow pack and above normal precipitation, the Beaver River, near Beaver City, flooded on May 24, 1984. The flooding resulted in property damages estimated at \$2,380,952.

There are many FEMA mapped flood plains located throughout the Five County Region of southwestern Utah. They are too numerous to list in this document. All potential economic development activities will be assessed as to impact to and impact from designated or potential floodplain areas.

### **Archeological, historic, prehistoric or cultural resource sites**

Five County works with the Utah State Historic Preservation office and Local Tribes in the region to identify any archeological, historic, prehistoric, of cultural site in the region.

### **Coastal Zone**

The Five County region is not located near any coastal areas.

## **Constraints to economic development**

Lack of adequate public utility infrastructure will be determined on a case by case basis when a proposed project is being studied. The larger cities in southwestern Utah all have active Capital Improvement programs to identify and prioritize improvement needs for infrastructure and other public facilities. Most of the smaller communities in our district participate in our Regional Consolidated Plan (a U.S. Department of Housing and Community Development requirement). Our agency solicits, compiles and lists all Capital Improvement projects throughout the region for the communities that voluntarily participate. Our communities routinely apply for and receive funding through various state and federal sources to address infrastructure deficiencies. Development of new resources, such as water, and improvements to road infrastructure in an area surrounded by so much federally controlled public lands always brings with it the potential for opposition by outside issues oriented organizations. Large scale infrastructure projects will always be studied and reviewed with that issue in mind. It is beyond the scope of this CEDS document to identify specific instances where constraints exist and would need to be studied in detail on a case by case basis.

## **Environmental Justice and social impacts to minority and low-income populations**

Any proposed economic development in the Five County region will not adversely affect minority or low-income populations. Native American cultural concerns are addressed on a project by project basis.

## **K. ECONOMIC RESILIENCY**

### ***Challenges and Deficiencies***

There are persistent economic challenges and deficiencies that have been identified. These include *public lands, rural geographic and infrastructure toward economic development*. Each will be discussed separately.

### **Public Lands**

Traditional industries of the region included farming, ranching, timbering, and mineral mining. These industries all relied heavily upon the utilization of both public and private lands. Nearly all occupations centered on these base industrial clusters. As settlers moved into the Southwest Utah area, land had to be cleared for production agriculture. Roads had to be developed for natural resource extraction. Water supplies were developed from mountain areas, springs, and rivers. Reservoirs were engineered and built along with canals and irrigation systems.

The livelihood of early residents was from the land and the natural resources it produced. Much of the land was rugged and impassible. Even grazing operations found the terrain difficult and unproductive. Federal agencies such as the Bureau of Land Management (BLM) and the United States Forest Service (Forest Service) were organized to assist states and local governments to manage these areas. The mission and goal of these agencies were to develop these lands into productive and developable real-estate. The original purpose of the BLM was to hold and manage barren and unclaimed lands until commercial and private uses were identified. Once a suitable purpose was identified, the BLM mission was to dispose of these lands and move them from federal management to private ownership.

On the other hand, the Forest Service was organized to help manage the vast resources found in forested lands. This included management for the extraction of timber, minerals, feed, and water

resources. They also managed fire control. Again, their overall purpose was to manage the forests for resource utilization by local business and industry. As the West grew there became more competition for the natural resources available on public lands. The Forest Service and BLM were given more responsibility. However, powerful special interest lobbies, environmental activists, and the politics of the Eastern states, nearly all privately owned, began to pressure congress in protecting and developing more wilderness on public lands. As a result, congressional rules and regulations have greatly changed the local direction and decision making ability of the Forest Service and BLM.

These agencies have evolved into managers of federally controlled lands with little authority to make local decisions concerning natural resource development, access, or other management practices. It is nearly impossible and so time consuming that privatization of public lands is no longer an alternative. Special interest lobbies and environmental activists have made economic development opportunities on these public lands nearly impossible.

The results, a large portion of the Forest Service and BLM budget are being utilized to litigate lawsuits involving public land decisions. States such as Utah and especially their rural areas with large holdings of public lands have struggled to maintain a sufficient tax base. Business development and expansion is for the most part met with ardent opposition. The special interest lobbies and environmental activists spin public lands and wilderness into a means of disruption and obstruction of economic development and growth. Funding resources from these groups has created heavy handed congressional control over these lands. Western congressional members cannot prevail in changing laws which make new or even existing resource development more accessible on public lands. Because of the disparity in taxes between states with no or little public lands and those with nearly all public lands, the State Institutional Trust Land program was developed.

Through congressional action, this program granted State rights and development of two sections, or 5.5%, of a township on federally controlled lands. The resources from the sale or development of these lands are mandated to support public schools. This program has helped rural counties and communities with some community and economic development opportunities.

### **Rural geography and infrastructure**

Outside of the metropolitan boundary in Washington County, there are deficiencies in alternative transportation, water development, utilities, technological advancement, and other infrastructure. With 90% of the State of Utah's population living in metropolitan areas, it is challenging to attract new and expanding business without these amenities.

### **Efforts in Economic Resiliency**

The region has developed goals, objectives, and strategies through the CEDS process when successful will propagate resiliency and overcome these challenges and deficiencies. General areas of focus identified include: enhancement of education; targeting the economic clusters of information technology, distribution/logistics, value added agriculture, aviation/composites, and small business; concentrating on business expansion and retention; developing entrepreneurship; and, recruit business/industry that compliments the regions needs and unique characteristics.

### **Anticipatory Focus**

The region has adopted the Hazard Mitigation Plan prepared by the Five County Association of Governments' Planning Department to mitigate natural disasters. The Hazard plan will be updated in 2015. The region is prepared for unforeseen disasters through active police, fire, and CERT trained professionals. The Southwest Public Health Department has issued Public Health guides in

the region, and plans to conduct a large scale mock disaster in 2016. The region will also subscribe to the monthly *Local Insights* publication by the State of Utah Department of Workforce Services to obtain an up to date economic and labor analysis of the Central Utah Area.

### **Flexibility**

The District does understand its assets through the involvement of local elected and government officials. Major employers seem to have access to sufficient capital and credit resources. Local governments are aware of and targeting potential emerging economic sectors that could lead to a more diversified economic base. For the most part, the majority of the area's workforces have chosen to live and remain employed in the five county area. They are multi-trained to obtain employment where opportunities prevail.

### **Network**

Through the District's Board, Technical Committee, Five County Association of Governments, counties, communities, state departments, congressional members, and stakeholders the region is able to predict economic slowdowns, shock and crisis. This communication will take place each time the Five County Economic Development Board and/or their partner organizations meet. The District and Association of Governments will serve as the coordinating entities for the Five County region.

### **Positive Vision**

Much of the CEDS 2014 is focusing on promoting a positive vision for the region. There are many events and activities sponsored by the Region to foster collaboration in visioning for the southwestern Utah area.

Each of the above mentioned subsets assist in the ability of the region to remain resilient to the ever changing economic conditions of the Five County area. This is the case for both a challenge and deficiency. It also helps communities, counties, and the region prepare for opportunities that become available.

## **L. YOUR UTAH, YOUR FUTURE: 2050**

The Governor of Utah initiated a state-wide envisioning process in 2013 that will collect survey data. The initiative started with elected officials, organizations and stake holders and will solicit public participation in the fall of 2014. The completed report should be completed by 2015 and will include specific data from the state and specifically district in which the economic development district will benefit.

### **How the state grows matters**

**Purpose:** Utah's population has doubled in the last thirty years, and it is projected to grow by another 2.5 million people by the year 2050. Southern Utahns are fond of their high quality of life, the beautiful, natural surroundings, and a strong economy. To protect those things that make Southern Utah an enviable place to live, a mutual vision of Utah's future must be laid out.

**Questions:** Will the air be clean? Will water supplies be sufficient? Will transportation alternatives be affordable, widely available, efficient, and will they promote growth and a higher quality of life? Will the cost of living remain low, and will quality employment continue to move into the area? Will housing options be accessible? How will open space, including natural, agricultural, and recreational lands, continue to be managed? Can education continue to improve? Can energy supplies be made

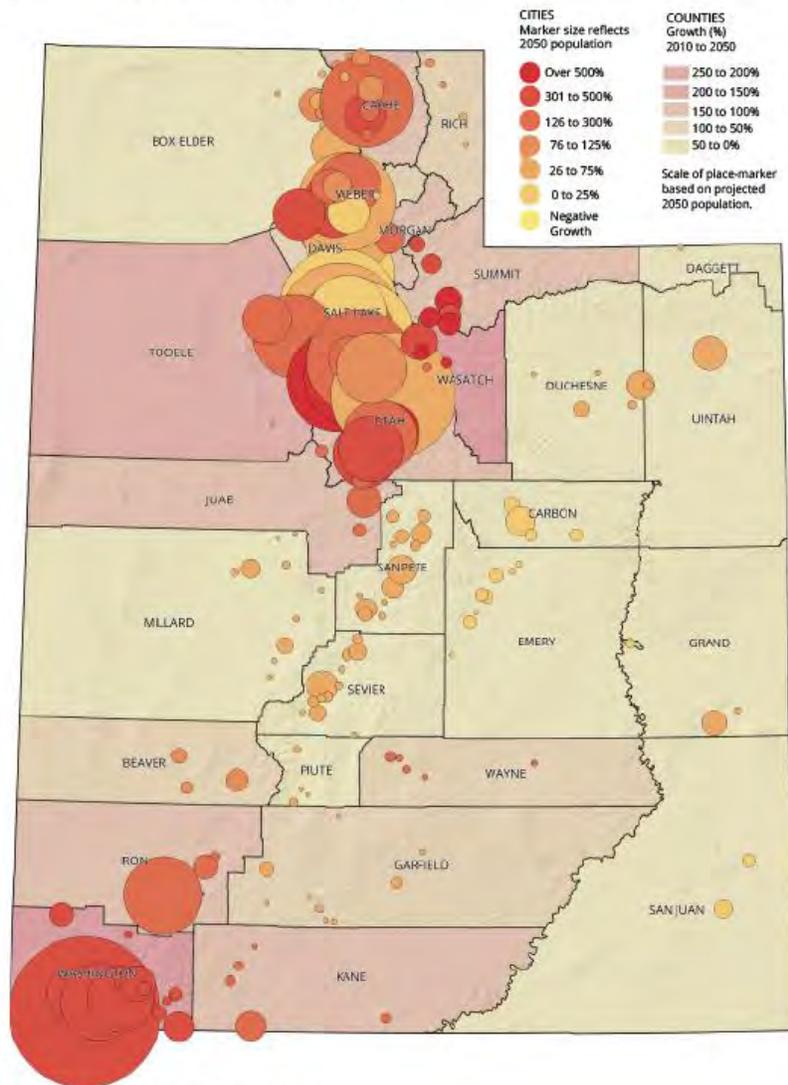
more affordable while making less and less of an impact on air, water, soil, and aesthetics? The answers to all of these questions depend on choices that are made in the immediate future.

Pursuant to those questions, and in the effort to build the "Your Utah, Your Future" agenda, the following, eight issues will be discussed:

1. Air Quality
2. Economic Development
3. Education
4. Energy and Disaster Resilience
5. Housing and Cost of Living
6. Natural Lands, Agriculture, and Recreation
7. Transportation and Communities
8. Water

Using data from the state, the Utah Foundation analyzed the population data to project Figure 5.

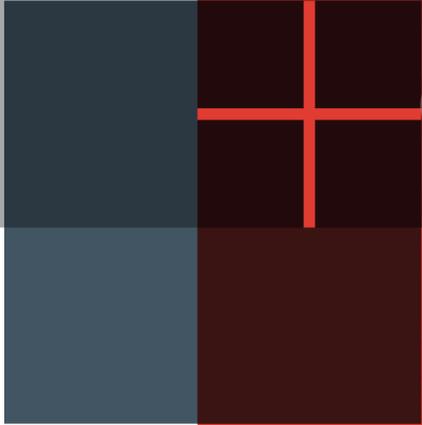
Figure 5: Heat Map of Population Growth Through 2050



Source: Utah AGRC, GOMB, Utah Foundation analysis.

# Envision Utah Preliminary Values + Priorities

Regional Values Ladders August 20, 2014

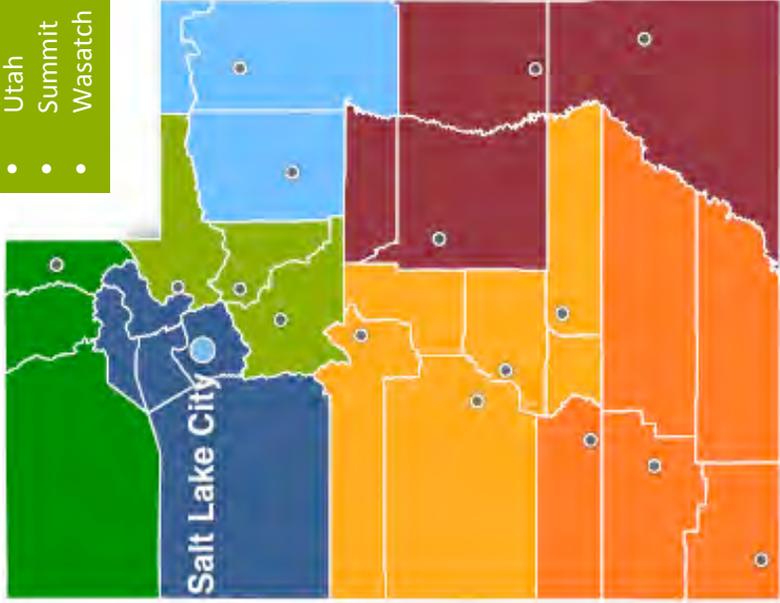


# UTAH'S AOG GEOGRAPHY

**MAG Planning Summit:**

- Utah Summit Wasatch

Sept 25, 2014



<p><b><u>BRAG PLANNING SUMMIT:</u></b></p> <ul style="list-style-type: none"> <li>• Box Elder</li> </ul>	<ul style="list-style-type: none"> <li>• Cache</li> <li>• Rich</li> </ul>	<p>50 Participants 7/1/14</p>
<p><b><u>WFRC PLANNING SUMMIT:</u></b></p> <ul style="list-style-type: none"> <li>• Weber</li> <li>• Davis</li> </ul>	<ul style="list-style-type: none"> <li>• Salt Lake</li> <li>• Morgan</li> <li>• Tooele</li> </ul>	<p>15 Participants 5/22/14</p>
<p><b><u>UINTAH BASIN PLANNING SUMMIT</u></b></p>	<ul style="list-style-type: none"> <li>• Uintah</li> <li>• Duchesne</li> <li>• Daggett</li> </ul>	<p>27 Participants 4/23/14</p>
<p><b><u>FIVE COUNTY PLANNING SUMMIT</u></b></p> <ul style="list-style-type: none"> <li>• Beaver</li> <li>• Iron</li> </ul>	<ul style="list-style-type: none"> <li>• Garfield</li> <li>• Washington</li> <li>• Kane</li> </ul>	<p>22 Participants 5/15/14</p>
<p><b><u>SEUALG PLANNING SUMMIT</u></b></p> <ul style="list-style-type: none"> <li>• Carbon</li> <li>• Emery</li> </ul>	<ul style="list-style-type: none"> <li>• Grand</li> <li>• San Juan</li> </ul>	<p>31 Participants 4/24/14</p>
<p><b><u>SIX COUNTY PLANNING SUMMIT:</u></b></p> <ul style="list-style-type: none"> <li>• Juab</li> <li>• Millard</li> </ul>	<ul style="list-style-type: none"> <li>• Sanpete</li> <li>• Sevier</li> <li>• Piute</li> <li>• Wayne</li> </ul>	<p>17 Participants 4/2/14</p>

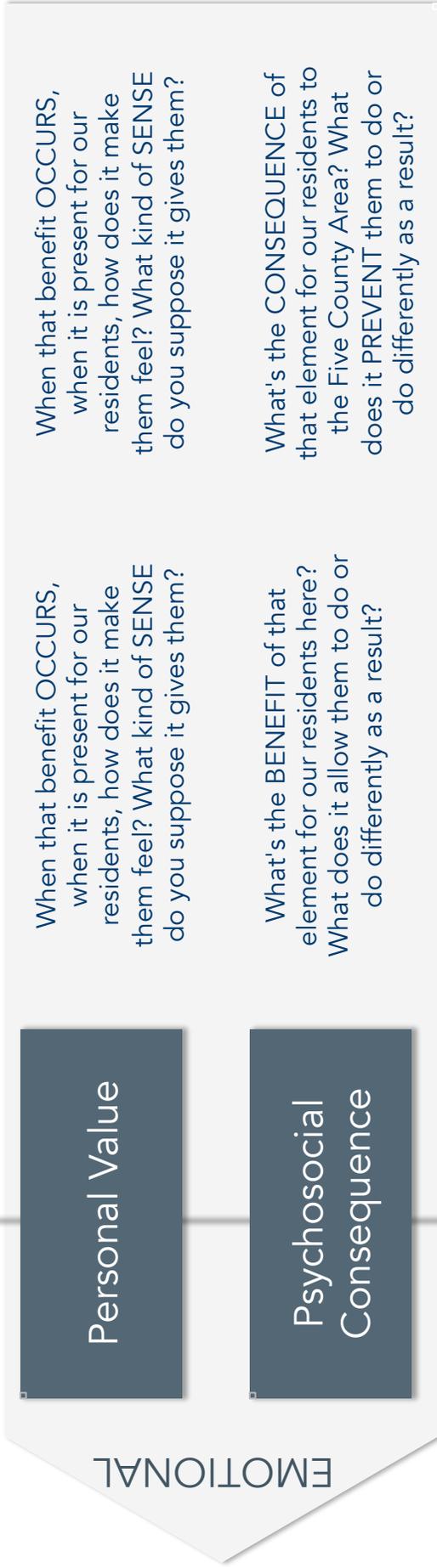
# Note On Qualitative Research

- This phase of research collects input and ideas from the leaders and key stakeholders in each of these regions. These preliminary maps are based on those participating and suggest issues and constructs these leaders believe to be important in their region. While not intended to be a final representation of the values and priorities of any region, they surface many of the key issues of the region and provide guidance to the values that may be involved.
- Values analysis is enhanced through Heart+Mind Strategies' extensive database on personal values in the context of regional visioning issues and quality of life around the country.

# VALUES Overview

## POSITIVE LADDER

## NEGATIVE LADDER



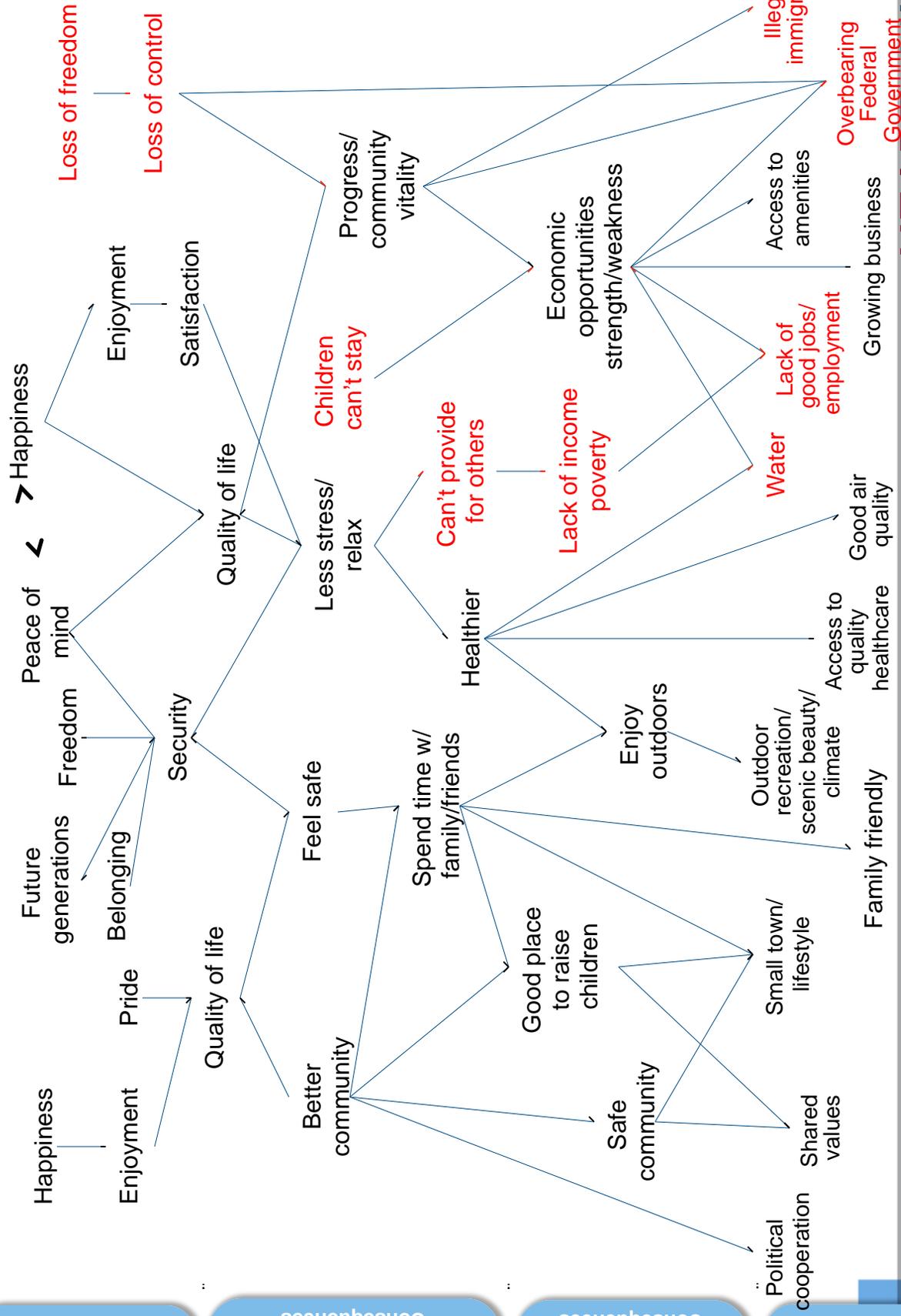
# Five County (April 23, 9 participants/June 18, Washington Co. 17 participants) Positive & Negative Ladders

Personal Values

Psychosocial Consequences

Functional Consequences

Attributes



# Five County (April 23, 9 participants/June 18, Washington Co. 17 participants)

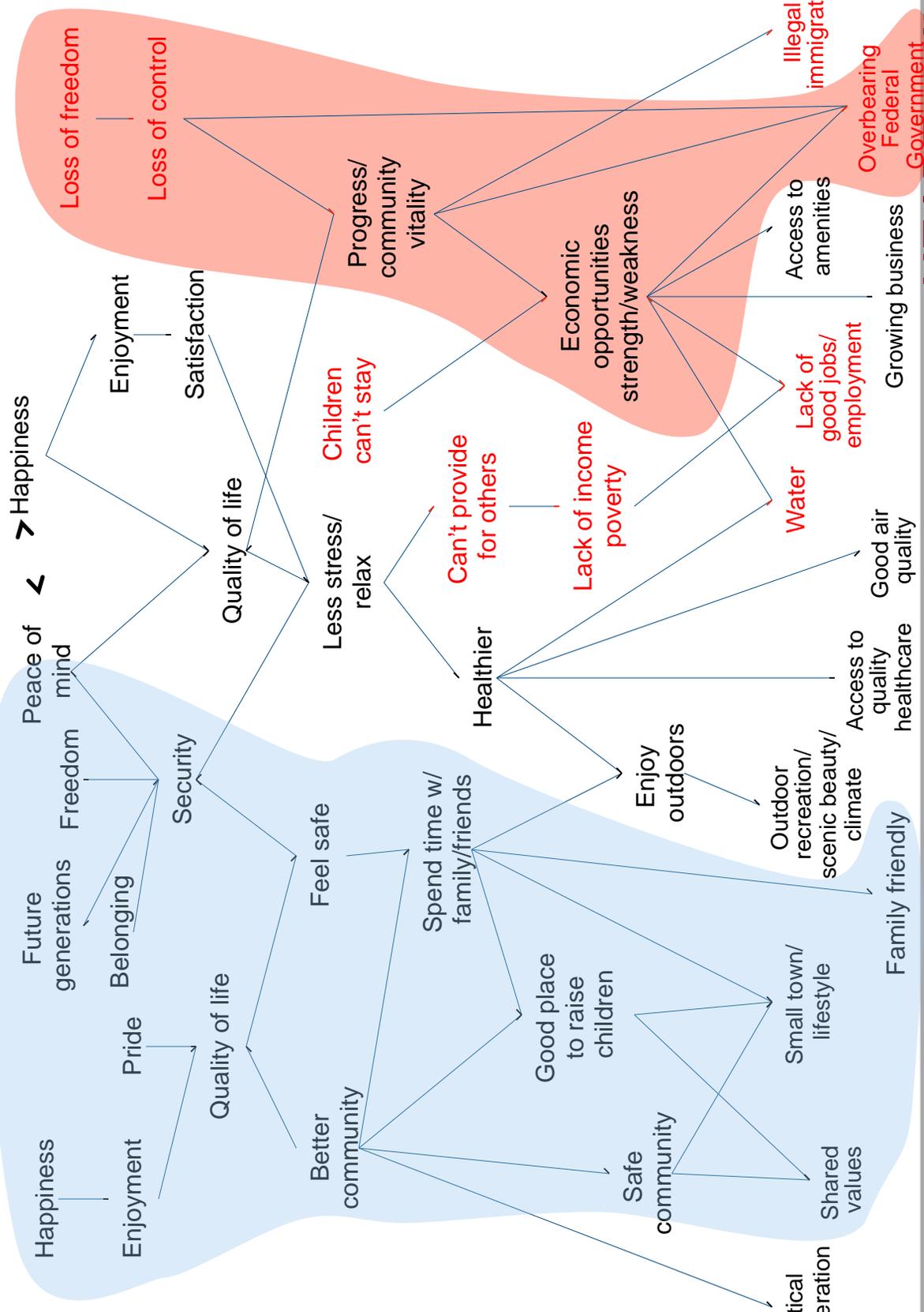
## Primary Positive & Negative Ladders

Personal Values

Psychosocial Consequences

Functional Consequences

Attributes



### **III. CHALLENGES AND OPPORTUNITIES**

In Metro Nation: How U.S. Metropolitan Areas Fuel American Prosperity, produced by the Metropolitan Policy Program at Brookings Institute, five trends identified both global and domestic, that underline emerging challenges to American prosperity. These are not listed in any priority order and all are intertwined.

- The U.S. economic powerhouse faces expanded global competition, thanks to economic liberalization throughout the world, skill upgrades in developing countries, and rapid technological advancement.
- Our domestic economy continues to restructure, with manufacturing representing a diminishing proportion of U.S. jobs, and a growing number of service-related sectors coming under new threat of off-shoring.
- Labor market changes have fueled economic polarization, as more highly educated workers and those who possess certain non-routine skills have reaped wage gains, while others have experienced stagnating incomes.
- Major U.S. demographic shifts portend future economic challenges, due to impending baby boom generation retirements and growth in the working age population concentrated among groups with lower levels of educational attainment.

#### **A. Expanded Global Competition**

New economies are expanding and emerging into the global marketplace. The ability to move goods quickly and cheaply due to an increase in shipping costs over the last several decades and rapidity of information exchange have enabled foreign economies to compete for manufacturing and service industries that were once U.S. dominated. However, the U.S. still remains the world's largest and most prosperous economy. The challenge is to ensure that industries are connected globally.

**EDD Opportunity** The opportunity for regions such as the EDD is that the world economy is now within reach of every business on Main Street. Continued economic growth in the developing world could create vast new markets for high-value products and services, if firms and workers continue to innovate, become more productive and target growing global marketplaces.

#### **B. Economy Restructure**

Nowhere is this trend more evident than in the shifting balance of the U.S. manufacturing versus service employment. According to the Brookings Institute analysis, in July 1950, about 14 million American jobs were in the manufacturing sector. Fifty-seven years later, in July 2007, that sector employed roughly the same number of workers. Yet in 1950, those 14 million jobs represented fully 31% of the U.S. nonfarm employment. By 2007, the much larger size of the U.S. economy overall meant that the share of nonfarm jobs in manufacturing had fallen to just over 10%. While off-shoring of manufacturing jobs has occurred for quite some time, service-sector off-shoring has occurred at a considerable pace in the last several years.

**EDD Opportunity** As the economy continues to restructure, the challenge for Utah and the EDD is finding a sustainable niche for new industry development that brings a higher quality of jobs to the region. The opportunity for the region is to build upon the EDD assets to build a sustainable economy.

#### **C. Labor Market Changes**

As the globalization, off-shoring of manufacturing jobs and technological advancements continue, workers with less formal education and skills development have very few middle-income jobs available to them. Prior to the economic downturn, U.S. workers at the low end of the education

spectrum have experienced very little wage growth over the past few decades. Since the late 1990's, only the most highly educated workers have experienced any real wage growth.

EDD Opportunity Technological improvements and expanded trade serve as an opportunity for highly skilled labor. Though this trend has reduced the relative demand for less-skilled workers, job training, retraining and quality education has become more important. The EDD is well positioned to take on this opportunity of expanding the overall skill level of the labor force.

#### **D. Demographic Shifts**

As the baby boomer generation – the 78 million Americans born between 1946 and 1964 – retires, the workforce will grow much more slowly in future decades and at the same time the number of people age 65 and over will increase. This trend, coupled with globalization and concerns about national output leveraging human capital more effectively, will be critical to ensure that Americans' standard of living continues to rise. The aging of the population coincides with the workforce becoming more racially and ethnically diverse, according to the U.S. Census Bureau.

According to the Census, between now and 2050, African Americans and Hispanics will grow from about 25% to nearly 40% of the working-age population and will account for more than 90% of total growth in that age range. These are among the fastest growing groups but their rates of educational attainment are the lowest. According to analysis by the Brookings Institute of American Community Survey data, in 2005, only 25% of African Americans and 17% of Hispanics held at least an associate's degree, compared with 38% of non-Hispanic whites and 56% of Asians.

EDD Opportunity Over time these demographic shifts will continue to challenge the region's ability to ensure an effective workforce, continue to raise the standard of living within the EDD, and provide for the growing needs of the aging population. An increasingly diverse workforce, if equipped with the necessary education and skills that complement new technologies, could take advantage of future gains from diversification that will narrow historical racial and ethnic economic disparities. The incubators developed and training programs available within the EDD provide tremendous opportunities for the region to address demographic shifts.

#### **E. Natural Resource Pressures**

Research on global climate change has shown that continued industrialization of developing economies worldwide poses stark new threats to the global environment. Rising emission levels in the earth's climate coupled with an increase in global and domestic consumption is having an impact on natural resources. Over the past decade, the U.S. has experienced rising energy costs that have impacted commodity prices substantially.

These issues will be exacerbated with future projected growth. Additionally, how communities grow impacts the number of vehicle miles traveled by residents and the energy consumed by buildings that directly impact greenhouse gases. How growth and development emerge in the future carries far-reaching implications for environmental health, energy independence and economic security.

EDD Opportunity The opportunity for the region is one of decision-making. Communities within the EDD can make decisions regarding urban growth patterns that can directly influence how much environmental impact the region will have. The region is seeing the creation of new industry opportunities and innovations that will protect environmental assets and pursue energy independence and managed growth strategies that will efficiently accommodate future population growth.

# The Future of Utah Coal

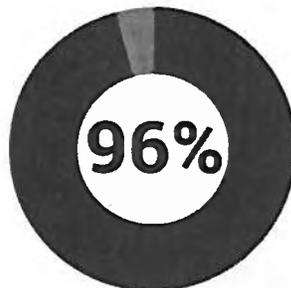
facts, scenarios, and options

## Study Questions

1. What is the role of coal in Utah?
2. How is that role changing?
3. What factors are affecting the coal market today?
4. Given current trends and possible events, what are the plausible scenarios for coal's future?
5. What opportunities do local leaders have to prepare their communities for the future of the industry?

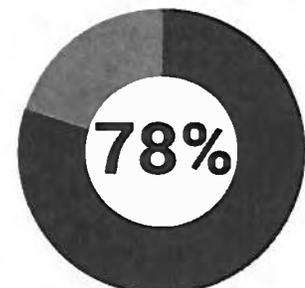
Utah's coal industry is in a period of flux. Shifts in the energy production and markets are constantly evolving the future of the coal industry.

**2004**



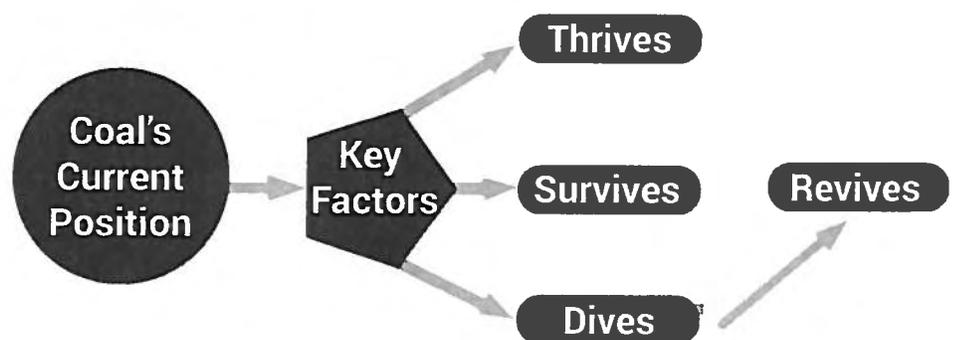
**2004:** Utah coal accounted for over 95% of Utah electric generation

**2012**



**2012:** Eight years later, coal accounted for 78% of electric generation

There are essentially four paths to the future of coal in Utah. Since its future isn't decided by any one issue or entity, an exploration of scenarios will provide the greatest insight.



Earlier this year, Southern Utah University brokered a study on behalf of counties with a significant tie to Utah's coal industry. In response, the Utah Rural Planning Group has developed a scenario plan that will ultimately help local leaders understand their options in this changing landscape.

learn more at:

[ruralplanning.org/coalstudy](http://ruralplanning.org/coalstudy)



# COAL THRIVES

*This scenario explores the future of coal as an indispensable power source for the US; with Utah as a regional producer of both coal and coal-fired power. It first explores how key uncertainties must play-out for coal to thrive in Utah as the de facto energy source for the state and country; then it explores the socio-economic impact this scenario would have on the Utah Coal Belt.*

## ASSUMPTIONS

**Public Opinion:** shifts toward a greater perceived threat (i.e. water scarcity)

**Govt Regulation:** decreases, or remains at current levels

**Technology:** for alternatives evolves according to historical patterns, while emissions tech improves

**Market Forces:** the market considers coal to be the lowest-risk, highest-return source

**Catastrophic Events:** a major event affects natural gas infrastructure, but not coal

## IMPLICATIONS

Central Utah has benefited greatly from its continued involvement in the coal industry. USU-East has become a top research institution in clean coal technology. Communities in the region have expanded, mines have reopened, and jobs in multiple fields are abundant. Mechanic shops are busy working on mine and transport equipment, and several towns have had mid- to large-sized retailers building on their main streets. Since other fuel costs continued to increase, several manufacturing companies have demonstrated interest in being located where energy prices are comparatively low.

**In this future,** the US has experienced a series of significant natural gas fracking accidents. Ground water pollution, and the resulting illnesses, took the public's attention by storm. Public attention to clean air has been replaced by widespread concern regarding water availability and purity. Fear of further disasters have caused federal and state regulators to place a stay on any new emissions requirements in order to ensure that coal-fired plants are able to meet the demand for energy.

Utah's power generating facilities and coal mines are producing more than they have since the mid-1990's. The likelihood of the nation demanding a move away from coal after the multiple fracking disasters is unlikely because nuclear is the next most viable alternative for base-load power generation. However, the fracking accidents also have the public concerned about nuclear power; they fear a similar accident will have even more dire effects on the country. Renewables have continued to increase capabilities, but they are still far from being consistent enough to achieve base-load capacity, leaving coal as the de facto energy source of the US.

At the same time, Utah coal is being used by facilities in Utah and other states. Population growth and development of the global market has kept coal costs at a premium. With other countries seeking low-cost fuel to generate electricity, they are willing to pay a premium for American coal because foreign coal production becomes unable to keep up with global demand. This enables Utah mines to continue to sell domestically and internationally despite the large number of mines that have entered the market across the country.

Carbon capture and storage (CCS), in addition to other clean coal technologies, have been implemented more cost effectively as money has poured into coal power plants. These advancements in technology have enabled plants to keep up with EPA regulations passed before the onset of the fracking accidents, and will likely enable coal plants to meet federal and state regulations in the future. Because emissions technologies have surpassed regulations it appears that old coal plants will continue to operate, while new coal plants are brought online to meet increased domestic energy demands.

Finally, the coal industry has a strong lobby in state and federal legislatures. Politicians want to burn coal because it is inexpensive and creates jobs for many of their constituents. Coal's relatively low price and technological advancements have greatly shifted public opinion, and politicians generally have a favorable stance because water pollution has become the primary public concern.

# COAL SURVIVES

*This scenario explores the future of coal if it continues to be used at or near current rates. It explores how key uncertainties would likely play out in a scenario where coal maintained its current level of utilization, and long term coal use trends continue.*

## ASSUMPTIONS

**Public Opinion:** maintains current trends

**Govt Regulation:** fluctuates at (current) levels that discourage new development in coal

**Technology:** renewable technology improves at the same rate as emissions solutions

**Market Forces:** maintain current trends

**Catastrophic Events:** a major event affects natural gas infrastructure, but not coal

## IMPLICATIONS

The continued decay of the industry leaves Utah's Coal Belt in a holding pattern of slow decline. Young people continue to move out of the area, leaving behind an aging population that generates little tax revenue for the counties. Emery County has maintained some of the revenue thanks to the construction of two oil refineries, but it has not solved their population's aging problem.

There are few new businesses, few new jobs, and while Utah's Coal Belt stays relatively unchanged for 10 to 12 years, it is apparent that there are few prospects for growth.

The decline will be slow and painful, perhaps even spanning two decades, but the demise of the coal industry in Utah is certain despite its timing.

**In this future,** public opinion continues to fluctuate. While the trend is downward over time, it is slow and gradual. Intensely polarized politics in Washington have slowed EPA's passage of new regulations as Congress debates the level of involvement and oversight the government should maintain over the power industry.

At the same time, there is a serious lack of viable alternatives to coal energy. Citizens have become equally wary of natural gas due to water contamination, which has been happening in degrees at several large fracking sites across the US. This has changed the focus for environmentalist groups to a "renewables-only" campaign. However, despite significant funding, renewable technologies have continued to improve at a stubbornly slow pace, making base-load energy supply from renewables an unrealized goal.

Emissions reduction technologies and new, inexpensive carbon capture and storage technologies reached the point of making the operation of older coal plants feasible (given EPA carbon dioxide regulations). Additional EPA regulations took into account the continued need for coal, and have thereby matched regulations to available cost-effective technologies.

The continued growth in demand is one reason that renewables have not kept pace with traditional sources. Despite efficiency efforts, demand for energy has outpaced technological developments in alternative energy sources alone. Consequently, renewables have gained some ground and are being built in earnest.

There is a slow, continued decline in the use of coal as more renewables are brought online. In the long run, it appears that coal will serve as a support to peak load energy supply. This is projected to evolve over the course of decades.

While nationally this trend appears to keep coal alive, projections decline more rapidly in Utah. Most concerning for the Utah's mines are the low levels of coal needed by in-state power plants.

# COAL DIVES

*This scenario explores the type of events that would need to occur in order for 'coalpocalypse' to happen in the Utah Coal Belt. The assumption is that Utah coal essentially remains in the ground.*

**In this future**, public opinion of coal and CO2 emissions continued to fall. Air quality and climate change/global warming became household concerns for citizens. Natural disasters are perceived as resulting from climate change, which in turn, is perceived as being caused by air pollutants. Similarly, the national economy consistently improved. Most citizens are willing to pay a higher energy bill each month with the assurance that their energy is 'green'. Across the US, citizens associate dirty air and extreme weather with coal emissions, and they demand action from politicians.

## ASSUMPTIONS

**Public Opinion:** substantially shift away from support of coal

**Govt Regulation:** consistent and overwhelming increase of regulation

**Technology:** renewable technology is incentivized heavily

**Market Forces:** coal markets collapse as alternatives increase their feasibility

**Catastrophic Events:** events don't directly affect coal infrastructure, but the public blames them on coal

## IMPLICATIONS

This is a devastating blow to Utah's coal industry. As mines and power plants close, the population shrinks and ages, leaving communities with little tax revenue to provide necessary services. Main streets become ghost towns as businesses dry-up. While new job sources are prevalent elsewhere in the country as a result of prolonged economic prosperity, Utah's coal counties experience an economic bust. Consequently, few businesses or manufacturers are interested in the region. The few youth still growing up in these communities to seek employment elsewhere as they graduate from high school and attend college.

This strong negativity in public opinion brings both sides of the political aisle together to regulate emissions. The EPA, states, and Congress pass increasingly stringent emission regulations that are not economically feasible for energy companies to keep pace with, especially since alternative energy sources, notably natural gas, develop the capacity to sufficiently power the US at reasonable prices. At the same time, in order to solicit support from environmentally-focused constituents in the Eastern States, the federal government implemented widespread wilderness designations across Utah.

In this scenario, natural gas and nuclear energy are considered more environmentally friendly than mining and burning coal despite storage problems for nuclear waste and potential ground water contamination from fracking. Additionally, solar, wind, and geothermal energy technology improved their efficiency and cost effectiveness. Because they were also supported with governmental subsidies, renewable energy sources began to compete with natural gas. Therefore, all fossil fuels became significantly less important to the national energy portfolio.

These changes fundamentally crippled the steam coal market in the US, and mining companies across the country began looking for foreign buyers, flooding the international market with coal and reducing the price substantially. These low prices have made it no longer economically feasible to mine coal in Utah, as mines in foreign countries sold coal at a rock bottom rate, a rate that only a few mines in the US could afford to produce at.

# COAL REVIVES

*This scenario attempts to illustrate the conditions necessary for the industry to regain viability after a substantial and fundamental decline. This scenario follows the pattern recently seen in Germany.*

## ASSUMPTIONS

**Public Opinion:** shifts completely away from environmental concerns

**Govt Regulation:** regulations are lifted after an extensive period of constraint

**Technology:** research and development investments are diverted to other sectors of the economy

**Market Forces:** demand for coal increases as demand for alternatives stagnates

**Catastrophic Events:** a global-scale crisis fundamentally shifts the economy

## IMPLICATIONS

This scenario provides temporary success for the coal industry in Utah. Power plants, mines, and supporting industries success have caused economic prosperity with high paying jobs for the majority of residents. This, however, will only last as long as the war and economic recovery afterwards. The coal mines are likely to continue operation, but in the long-run, power plants will shut down and large numbers of citizens will leave nearby communities.

The economic decay the region faced in the 2010's will return in the near future if additional job sources are not created for citizens outside the mining, power production, and support industries that resurged.

**In this future,** coal in Utah experienced a significant decline, yet market forces create resurgence in coal use. A protracted world-war has erupted, driving the US to seek cheap, reliable energy sources as they try to maintain their economy. The natural gas plants that replaced coal plants lack storage capacity to continue operations and became easy targets for combatants. This caused the country to turn back to coal, and compelled the President to issue an Executive Order suspending emissions regulations for the duration of the war.

Coal plants are re-opened and jobs in central Utah are abundant. People move into communities to take jobs, and new industrial operations are being established in the region to take advantage of the cheap energy, existing vacant structures, and proximity to rail to supply the US war effort.

The war became a standoff. Utah's coal economy benefited from the sustained demand. However, gradually, politicians on either side of the aisle voiced their appreciation of the coal industry, but also stated their intentions of once again eliminating the industry after the war is over.

Public attention was completely occupied by the war. Citizens appreciated the economic benefits of coal more than they feared the use of it. Many believe and hope that coal will continue as the economy tries to get back on its feet after the conclusion of the war.

Coal plants across the country experienced the same success, and economists believe that at the war's conclusion, other countries will be eager to purchase coal the world over as they seek inexpensive power to kick-start their economies. This caused global coal prices to remain high enough to make mass exports of Utah coal economically feasible for the foreseeable future.

## IV. CEDS PLAN OF ACTION

The fundamental purpose of a CEDS is to bring together the public and private sectors in the creation and implementation of an economic roadmap to diversify and strengthen regional economies. It is the result of a continuing economic development planning process.

The EDA provides assistance to Planning Organizations to develop, revise and replace a CEDS. The CEDS Plan of Action is intended to address the following:

- Promote economic development and opportunity;
- Foster effective transportation access;
- Enhance and protect the environment;
- Maximize effective development and use of the workforce consistent with any applicable state or local workforce investment strategy;
- Promote the use of technology in economic development; including access to high-speed telecommunications;
- Balance resources through sound management of physical development; and
- Obtain and utilize adequate funds and other resources.

The CEDS was developed in compliance with federal requirements and the Plan of Action goals outlined above.

### A. CEDS VISION and GOALS

#### Vision Statement

The Five County region of Southwestern Utah exhibits many positive economic factors, including high labor skills, competent labor climate, Interstate-15 access, excellent natural recreational opportunities, low unemployment rate, moderate real estate tax costs, and proximity of support services. These and other positive economic factors have created one of the most dynamic regions of the Intermountain West.

With the above in mind, Southwestern Utah continues to step forward to a higher economic level in the 21st Century. The region will focus on and effectively market its economic strengths to increase its economic diversity. At the same time, region officials will also prepare alternative plans to mitigate negative forces or barriers to economic development. As negative economic forces are curtailed, positive forces will escalate which will allow the region to pursue many of its economic desires. As the population increases and the diversity of employment expands, additional higher income skilled employment will grow.

The Five County Association of Governments is committed to a proactive economic development program which will:

*Encourage the best use of the existing economic diversity, traditional values and skilled labor force; the establishment of local economic development boards; wise use of available funding mechanisms; appropriate development standards and focused efforts in education; and greater public involvement to attain a dynamic, cooperative and strong economic future.*

#### Comprehensive Economic Development Strategy Committee

Coordinate Data from “Your Utah, Your Future” statewide envisioning process.

Provide regionally-focused services that complement county and community economic development programs. Specific services include:

- Revolving Loan Fund marketing and administration across the region, rather than establishing other county or community-scale loan programs.

- Preparation of project-level Environmental Assessments within the capacity of available staff resources.
- Delivery of technical planning assistance regarding workforce housing design and construction.
- Development and delivery of up-to-date land use planning training modules.
- Author planning and feasibility studies for projects that transcend county or community boundaries as directed by the Steering Committee.
- Update the regional hazard mitigation plan.
- Updated the regional Consolidated Housing Plan.
- Maintain a functional and informative Internet web page.
- Continue to provide high quality grant writing and technical assistance to jurisdictions in Southwestern Utah.
- Focus efforts on jurisdictions that do not have internal staff support to provide day-to-day economic development outreach. Specific activities include: Participation in regional and state-wide initiatives such as the Utah Economic Alliance, Governor's Rural Partnership Board, etc.
- Represent southwestern Utah interests at forums such as: Western Region Workforce Services Council
- Heritage Highway 89 Alliance; Scenic Byway 12 Committee
- Utah's Patchwork Parkway (Hwy 143) Committee
- Grand Staircase-Escalante National Monument Advisory Committee
- County and community-level Economic Development Boards
- Forge closer ties between economic development and public/higher education initiatives in the region.
- Champion regional projects that foster economic development, such as: Extending commercial power capacity to Ticaboo/Bullfrog
- Providing IT/Broadband redundancy across the region
- Establishing access to secondary financing, and other activities that foster access to affordable workforce housing.
- Provide public lands planning expertise and capacity to local officials.

### **Goals and Policies Still in Effect**

- Encourage a Business Climate that will Continue to Attract Diverse Non-Polluting Industries.
- Diversity the Economic Base so that Adverse Economic Conditions Affecting One Industry will not Significantly Impact the Local Economy as a Whole.
- Provide the Types of Employment that will Stem Out-Migration and will Stimulate Re-Migration.
- Develop the Region's Natural Resources, Especially Timber, to the Extent Possible while Encouraging the Employment of Local Citizens and the Establishment of Permanent Facilities which will Increase the Tax Base.
- Retain the Agricultural and Grazing Sectors as Necessary Elements of the Region's Economy.
- Continue to Develop and Expand the Recreation and Tourist Industries.
- Utilize the Movie Industry to an Advantage by Encouraging the Location of Fixed Facilities for Movie Production and Hiring Local Residents to the Maximum Extent.
- Assist and Encourage Firms to Locate in Established Industrial Parks and Areas that would use Municipal Services, Transportation Access, etc. Aggressively Pursue the Development of Potential Industrial Parks/Areas for Communities of Beaver, Kanab and Panguitch.

- Continue the Increase in Manufacturing Employment in the Region.
- Continue the Support of Existing and New Industrial Development Boards at Local and Regional Levels to Guide Development Actions and to Ensure Policy Input from Elected Officials and Citizens.
- Provide an Effective Communications Process Among all Boards and Citizen Groups in the Region.
- Industrial Development Efforts in the Region should be Carefully Coordinated to Maximize Related Efforts and to Eliminate Duplication or Unnecessary Competition Among Boards or Communities.
- Data collection and analysis must focus on review and reorganization of existing information when possible rather than wasting resources on new studies.

## **B. Action Plan**

### **Region-wide Strategies**

As the Economic Development Administration has entered into a new century and administration, cabinet-level leadership has challenged the agency and grantees to refocus the direction of economic development efforts. The Five County Economic Development District is committed to achieving the following investment strategies outlined by David A. Sampson, the former Assistant Secretary of Commerce for Economic Development:

- Economic development projects and actions will be market based.
- Economic development strategies will be proactive in nature and scope.
- Regional staff will champion county and municipal economic development programs that look beyond the immediate economic horizon, anticipate economic changes, and diversify the local and regional economy.
- Private capital investment will be maximized.
- The probability of success will be determined and documented with the following contributions: Local, state, and private matching funds will be integral pieces of economic development projects. A high degree of commitment of local political "capital" by elected officials.

Commitment of human resources talent to project outcomes.

- Economic development projects will create an environment where higher paying, lucrative jobs are created.
- Economic development projects will maximize Return on Taxpayer Investment.

### **Beaver County Strategies**

The Beaver County Economic Development Council organized and has been functioning in the county since January of 2014. The immediate need for the council is to fund and develop a strategic plan to implement economic growth. The effort was undertaken in order to “Create a strong economic environment based on (our) diverse resources to support and provide opportunities for orderly growth while maintaining traditional values”. The Governor’s Office of Economic Development –Rural Development is coordinating this effort.

Participants in the planning process identified seven objectives with associated action steps:

#### **Objective 1 – Business Retention & Expansion**

1.1 Develop better participation in county-wide efforts to enhance expansion, recruitment and retention.

- A. Seek funding from local and state governments.

- 1.2 Develop Beaver City Industrial Park.
  - A. Promote city and county cooperation for site preparation.
  - B. Recruit a key tenant.
- 1.3 Develop industrial rail-siding capabilities.
  - A. Work with developing industries to build rail-siding capacity.
- 1.4 Redevelop (Beaver/Milford) downtown retail businesses.
  - A. Develop a consensus on direction from industrial communities.
  - B. Initiate downtown redevelopment.
- 1.5 Help maintain viability of local ski resort.
  - A. Develop a working relationship to develop and promote industry.

## **Objective 2 – Agriculture**

- 2.1 Develop recruitment strategies for dairies to use Beaver County alfalfa.
  - A. Recruit at trade fairs.
  - B. Advertise with dairy-specific information and secure a grant from the state or county or other.
  - C. Establish a hosting committee.
  - D. Identify and promote best locations for dairies (include water, zoning, utilities, access
- 2.2 Establish a container port for exports to other counties.
  - A. Identify best open rail spur for port.
  - B. Research export regulations.
  - C. Establish working relationships with brokers and port authorities.
  - D. Develop a port authority business plan to be used to secure funding.
- 2.3 Market alfalfa in value-added packages to new markets east and west.
  - A. Do market and technology research for alternative uses for alfalfa.
  - B. Identify from research the best opportunity for success.
  - C. Encourage development from private sector.
  - D. Develop a partnership with the marketing arm of the Department of Agriculture.
- 2.4 Streamline ag-related permitting and zoning process.
  - A. Support legislative action to encourage and streamline regulatory requirements for agriculture and to transfer the Department of Environmental Quality (DEQ) ag-permitting function to the Department of Agriculture.
  - B. Utilize ag protection districts for farmers.
- 2.5 Diversify ag products and support services for crops and animals.
  - A. Recruit a veterinarian.
  - B. Study the service and support needs of ag industries in Beaver County; recruit or expand the identified support industries.
  - C. Work with the Utah State University on alternative crops and livestock; educate local farmers and ranchers regarding alternative crops and livestock.

## **Objective 3 – Infrastructure**

- 3.1 Promote an aggressive street maintenance and improvement program.
  - A. County Commission will appoint a transportation committee.
  - B. Develop a capital improvements program and acquire grant money.
- 3.2 Encourage adequate utilities for all county residents.
  - A. Lobby for fiber optic service to all constituent communities.
- 3.3 Support and expand current emergency programs as growth warrants.
  - A. Maintain current level of service.
  - B. Adopt and implement new technology.

- 3.4 Develop and implement a county-wide disaster plan.
  - A. Review and update regularly.
  - B. Educate residents by a general mailing.
- 3.5 Encourage an up-to-date master plan for community development in every community in Beaver County.
  - A. Provide input when requested.
  - B. Cooperate with individual cities and the county in solving problems.

**Objective 4 – Tourism and Recreation**

- 4.1 Encourage and promote quality tourism and recreational programs county-wide.
  - A. Research and evaluate the need for a county-wide recreational department.
  - B. Form a county-wide cultural arts council.
  - C. Establish and encourage Heritage Tourism.
  - D. Promote the use of the American Discovery Trail and other area trails.
  - E. Form scoping committee to determine destinations and trails to promote.

**Objective 5 – Housing**

- 5.1 Do a housing study to determine future needs and resources.
- 5.2 Develop capital resources.
  - A. Lobby politicians to reallocate Farmers Home Administration dollars.
  - B. Expand housing authority programs.
  - C. Use Utah Housing Fund.
  - D. Encourage local banks to make loans available.
  - E. Research the state retirement fund to buy housing loans.
- 5.3 Develop affordable housing.
  - A. Locate acceptable locations for manufactured housing in planned unit development (PUD); establish zoned areas for multi-family housing.
  - B. Find ways to improve cooperation between developers and local governments.
  - C. Research ways to fill the need for more certified building inspectors in the county.
- 5.4 Recruit a certified appraiser.

**Objective 6 – Natural Resources**

- 6.1 Support positive land management.
  - A. Support legislation to standardize federal requirements.
  - B. Encourage settlement of the wilderness issue.
  - C. Support multiple-use, not wilderness.
  - D. Promote world class mineral deposits in Beaver County.
  - E. Use the Rural Development Council to assist in overcoming land management challenges.
  - F. Develop a Habitat Conservation Plan.
  - G. Oppose mining law changes that discourage local mining opportunities.
  - H. Support efforts to access timber by rural mills.
- 6.2 Add value to Beaver County geothermal resources.
  - A. Investigate and promote greenhouses.
  - B. Increase energy production at power plants.
  - C. Explore the possibility of aquaculture.
  - D. Develop recreational uses of geothermal (hot tubs, spas, health clubs).
- 6.3 Manage Beaver County’s wildlife resources.
  - A. Develop a wildlife and fisheries resource plan with Bureau of Land Management, Forest Service, Division of Wildlife Resources, and recreational hunters.

- 6.4 Protect supplies and uses of Beaver County water.
  - A. Educate users to the best water use practices.
  - B. Participate in the Beaver River Water Plan.

### **Objective 7 – Professional Services**

- 7.1 Complete a survey of local needs in the medical, educational, trades, legal and other professional services required by the community.
  - A. Implement an active recruitment program based on findings.
  - B. Establish work force training programs to meet anticipated needs. (Area technical center)
- 7.2 Develop a continuing process to estimate the enrollment for public educational programs and timing to implement programs and facilities for incoming and new students.
  - A. Determine funding sources.
- 7.3 Diversify continuing education.
  - A. Full implementation of educational network.
  - B. Access new mineral lease regulation bill funding through Community Impact Board.
  - C. Increase extension services role.
- 7.4 Research the feasibility of establishing innovative daycare programs to expand potential labor force and provide additional employment opportunities.
- 7.5 Survey to find underemployed professionals.

### **Garfield County Strategies**

Garfield County in 2014 solicited a request for proposal for a countywide Economic Development Study and to determine the feasibility for an Existing Industrial Park in Panguitch. Two requests were submitted and funding procurement of the study is the largest obstacle to implementation. The Governor’s Office of Economic Development –Rural Development is coordinating this effort.

In the summer of 2005, the Garfield County Commission recognized the need to update the Garfield County General Plan to address resource management. The Garfield County Resource Management Plan (RMP) was adopted November 27th, 2006. One of the resulting recommendations from the RMP was to initiate a Countywide, comprehensive economic development plan. Under the direction of the Garfield County Planner and with the assistance and financial support of the Governor’s Office of Planning and Budget, Garfield County developed an Economic Development Plan.

A planning team comprised of community leaders, local residents, business owners and/or representatives from land management agencies in the County were selected and approved by the County Commission. The team included representatives from Grand Staircase Escalante National Monument, Dixie National Forest, Utah State University Extension Services, Ruby’s Inn, Panguitch City, local business owners and the Garfield County Planner. The Garfield County Economic Development Plan was periodically reviewed by the Garfield County Commission, and the Planning Commission

This plan provides recommendations founded upon nine primary vision elements that will guide future implementation strategies by the County. These elements focus on the following:

1. Increased Tax Base: To generate additional revenue to support, maintain, and improve local infrastructure and services such as water systems, roads, parks, libraries, hospitals, clinics and emergency medical services. Careful and frugal use of public expenditures.

2. Job Development: To encourage a wide variety of industries and jobs which provide better wages, benefits, and opportunities for advancement.
3. Business Retention: To encourage economic growth from within the County. Businesses that feel appreciated by the community and, in turn, feel as if they are contributing to the economy will stay in the County, and continue to provide employment opportunities.
4. Economic Diversification: To Expand the economy and reduce the County's vulnerability to a single business sector. Develop a diverse stable economy that provides economic opportunities for all citizens which is essential to a healthy and balanced community, and helps to insulate the County from economic downturns in specific industries.
5. Self-sufficiency: To assist Garfield County residents with economic self-sufficiency to break the cycle of government reliance. Public/private cooperation with an organized approach to economic development with self-sufficiency in mind. To work together with cooperative community spirit toward a common goal, and focus on self-reliance.
6. Productive Use of Property: To use property for its "highest and best use" maximizing the productivity of that property. In addition to the brick and mortar investments, all decisions are made with an outlook on the future.
7. Quality of Life: To increase local tax dollars and jobs to raise the economic tide for the County, which generally increases the overall standard of living of the residents. Conviction that, in the long run, local citizens have the power to increase the quality of life and that destiny is in their own hands. Making communities good places to live is a proactive assignment and it should be eagerly embraced.
8. Recognition of Local Products: To increase the awareness of locally produced products and services, and to increase the degree locally produced goods are consumed in the local market. Local loyalty is emphasized, but thriving communities know who their competitors are and position themselves accordingly.
9. Sophisticated Use of Information Resources and Networking: Networking and pooling of all resources in Garfield County is imperative to success in a rural environment. Several efforts going on in the County should be connected and working together, i.e. scenic byway coordination, (Highways 12, 143, and 89), along with planning, tourism, heritage, and natural resource development. Leaders should seek to access information that is beyond the knowledge base available in the community. County leaders should compete for government grants and contracts and for economic and social programs.

**Goal 5: Work to establish Internal County and Planning/Economic Development Office processes for economic development plan implementation.**

Objective 1: Take steps to make County Planner's office the Economic Development Office.

Action item: Provide annual budget request to the County Commission

Responsible party: ED Office & County Clerk

By when : 4th quarter

Action item: Annually present completed economic development plan and update of ED Office activities to all Garfield County city councils.

Responsible party: ED Office

By when: 1st quarter

Action item: Contribute at least six submissions (e.g., articles, announcements, advertisements, etc.) from the economic development office to *The Garfield County Insider* and publish the same on the county website.

Responsible party: ED Office

By when: at least bimonthly, six total

Action item: Send an introductory letter or newsletter to Garfield County businesses introducing the ED office and the pertinent elements of the ED plan.

Responsible party: ED Office

By when: 2nd quarter

Objective 2: Establish and maintain a website for Garfield County, including the Planning/Economic Development Office.

Action item: Acquire hardware, install software, and choose content management system (e.g., MediaWiki, Zope, Plone)

Responsible party: ED Office

By when: 1st quarter

Action item: Register domain name(s) and ask ITS to open ports and enter DNS information.

Responsible party: ED Office & ITS

By when: 1st quarter

Action item: Determine feasibility of internship for system development, maintenance, and/or content creation.

Responsible party: ED Office

By when: 1st quarter

Action item: Create business countywide business directory.

Responsible party: ED Office, business owners, & intern

By when: Ongoing

Objective 3: Assess options for creating, managing and facilitating a Garfield County Economic Development Council.

Action item: Conclude business with the current economic development planning committee.

Responsible party: ED Office and ED planning team

By when: 1st quarter

Action item: Present multiple options for an economic development council to the County Commission.

Responsible party: ED Office

By when: 3rd quarter

Action item: Implement the County Commission's decision.

Responsible party: ED Office

By when: 4th quarter

Objective 4: Establish a partnership with the Economic Development Corporation of Utah.

Action item: Apply for funds to publish the county Strategic ED Plan.

Responsible party: ED Office

By when: 3rd quarter

Action item: Apply for funds to pursue Economic Development training.

Responsible party: ED Office

By when: 4th quarter

Action item: Establish eligible Sure Sites.

Responsible party: ED Office & municipal governments

By when: As determined by eligibility requirements

**Goal 6: Provide assistance to businesses and entrepreneurs, as guided by the General Plan, pages 53 and 54, parts 9, 10, and 14-16**

Objective 1: Research and become familiar with the Garfield County economy and businesses.

Action item: Create and maintain a Garfield County business list

Responsible party: ED Office

By when: business list by third quarter; maintain ongoing

Action item: Create and maintain a Garfield County Economic Development information packet.

Responsible party: ED Office

By when: packet by third quarter; update as needed

Objective 2: Identify & learn about economic development resources for existing businesses and entrepreneurs.

Action item: Investigate business service offerings from Utah State University, including USU Extension Services, Southern Utah University's Business Resource Center, state government (e.g., GOED, and the, federal government (e.g., USDA, Small Business Administration, Department of Commerce), and any other sources.

Responsible party: ED Office & USU Extension Office

By when: Ongoing

Action item: Become familiar with grant and loan opportunities for new and existing businesses.

Responsible party: ED Office & USU Extension Office

By when: Ongoing

Action item: Governors Energy and Tourism Summit

Responsible party: ED Office

By when: 2nd and 3rd quarter

Action item: Attend Utah Rural Summit, Cedar City

Responsible party: ED Office

By when: August

Action item: Become conversant with the Five County Revolving Loan Fund and assist in packaging eligible deals.  
Responsible party: ED Office  
By when: Ongoing

Action item: Incorporate the Garfield County ED Goals and Objectives into the Southwestern Utah Comprehensive Economic Development Strategy.  
Responsible party: ED Office  
By when: 2nd quarter

Action item: Become familiar with the programs of the federal Economic Development Administration and participate in the regional Economic Development District  
Responsible party: ED Office  
By when: Ongoing

Objective 3: In partnership with the USU Extension office, implement the Garfield County Business Expansion and Retention (BEAR) Program.

Action item: Request initial funds for BEAR software license from Garfield County.  
Responsible party: ED Office  
By when: 1st quarter

Action item: Apply for funding for BEAR surveyors through SUU.  
Responsible party: ED Office  
By when: 1st quarter

Action item: Investigate funding options for BEAR implementation from GOED and other sources.  
Responsible party: ED Office  
By when: 1st quarter

Action item: Attend BEAR Program training hosted USU Extension. Responsible party: ED Office & USU Extension  
By when: 1st quarter

Action item: Identify industry sector priority surveys.  
Responsible party: ED Office & USU Extension  
By when: 1st quarter

Action item: Edit the BEAR survey to better suit Garfield County's business needs.  
Responsible party: ED Office & USU extension  
By when: 2nd quarter

Action item: Perform practice surveys.  
Responsible party: ED Office & USU extension  
By when: 2nd quarter

Action item: Contract with BEAR surveyors and begin to implement BEAR program.

Responsible party: ED Office & USU extension  
By when: 2nd quarter, implementation ongoing

Action item: If appropriate, renew funding request from SUU.  
Responsible party: ED Office  
By when: 4th quarter

Objective 4: Provide follow up services and assistance from information gathered from BEAR surveys & outreach (Goal 4, Objective 2).

Action item: Continually respond to needs of businesses as identified from BEAR survey  
Responsible party: ED Office  
By when: Ongoing

Action item: Provide up to two workshops/trainings as a result of BEAR survey results or other business outreach initiatives.  
Responsible party: ED Office and other partners such as USU Extension, SUU, Manufacturing Extension Partnership, USTAR, PTAC, etc.  
By when: year's end

Objective 5: In partnership with USU, plan and conduct the annual Garfield County Business Conference.

Action item: Seek funding from SUU and other sources.  
Responsible party: ED Office & USU Extension Office  
By when: Ongoing  
Action item: Assist with conference preparation and hosting.  
Responsible party: ED Office & USU Extension Office  
By when: March 2015

Objective 6: In the spirit of Goal 1, Objective 2 and Goal 4, Objective 1 have the economic development office be the conduit to business service providers.

Action item: Establish a pattern of proficiency in delivering the right services to local businesses and entrepreneurs.  
Responsible party: ED Office  
By when: Ongoing

**Goal 7: With the appropriate partners, work to support and strengthen the Agriculture and Natural Resources sectors of Garfield County's economy.**

Objective 1: In keeping with the Garfield County General Plan, pages 54 and 55, parts 6, 19, and 2531, the economic development office shall assess the needs of local sawmills and other wood products businesses.

Action item: Partner with Skyline Forest Resources to identify needs and opportunities with which Garfield County Economic Development could assist. Where possible and appropriate, deliver ED Office assistance.

Responsible party: ED Office & Skyline Forest Resources

By when: meet by 2nd quarter; assistance TBD, but may be ongoing

Action item: Partner with K&D Forest Products to identify needs and opportunities with which Garfield County Economic Development could assist. Where possible and appropriate, deliver ED Office assistance.

Responsible party: ED Office & K&D Forest Products

By when: meet by 2nd quarter; assistance TBD, but may be ongoing

Action item: Identify other wood products business that could benefit from assistance in like manner to that identified in this objective.

Responsible party: ED Office

By when: Ongoing

Objective 2: Research agricultural opportunities in the County, as per the General Plan, page 54, parts 5, 13, and 2224.

Action item: Research the feasibility of growing crops and livestock that are not currently grown in the County.

Responsible party: ED Office & USU Extension Office

By when: 3rd quarter

Action item: Research different methodologies to increase yield and/or lengthen growing season.

Responsible party: ED Office & USU Extension Office

By when: Ongoing

Action item: Identify new markets for locally raised agricultural products.

Responsible party: ED Office & USU Extension Office

By when: 3rd quarter

Action item: Attend the USU Extension Diversified Ag. conference

Responsible party: ED Office

By when: 1st quarter

**Goal 8: Participate in Garfield County infrastructure development as appropriate.**

Objective 1: Investigate and assess more robust Internet options for Garfield County and its municipalities.

Action item: Assess options for UTOPIA project and other projects.

Responsible party: ED Office

By when: 2nd quarter

Action item: As appropriate, assist the private sector in pursuit of the objective.

Responsible party: ED Office

By when: Ongoing

Action item: Present options to municipalities as appropriate.

Responsible party: ED Office & UTOPIA

By when: 3rd quarter

Objective 2: Promote infrastructure in eastern Garfield County, consistent with the General Plan, page 54, part 20.

Action item: participate in Ticaboo commercial electrification feasibility study.

Responsible party: ED Office & FCAOG

By when: Ongoing

## **Iron County Strategies**

UCAP will be a driving goal for the economic needs of Iron County. The program is designed to strengthen collaboration between education, industry, and economic development to respond to the regional needs and statewide-designated clusters. The focus is to increase economic clusters and educational attainment. Respond to skill gaps in the indentified industry while promoting regional stewardships that emphasize regional institutions.

### **Objective 1 – Foster cooperation and communication among local, county and area leaders.**

- 1.1 Found a Business Council Think-Tank to coordinate economic development efforts with local organizations such as the Cedar Area Chamber of Commerce, Iron County Tourism & Convention Bureau, Small Business Development Center, Southern Utah University, Southwest Applied Technology College, and the Iron County Homebuilders Association.
- 1.2 Host Town Hall meetings concerning pressing economic issues to collect feedback from affected parties, identify action items, create a task force, and explore solutions.
- 1.3 Maintain close working relationships with elected officials and governmental agencies and staff, including: US Senators and Congressmen, US Department of Commerce Economic Development Administration, Utah Governor’s Office of Economic Development, Economic Development Corporation of Utah, Utah State Legislators and others.

### **Objective 2 – Recruit quality businesses providing higher wages and benefits to employees**

- 2.1 Establish recruitment strategies; identify criteria (wages, property and equipment investment and environmental impacts) and execute and action plan.
- 2.2 Develop a system of identifying and recruiting prospective businesses.
- 2.3 Create a systematic incentive program for recruitment and retention of businesses paying 150 percent of Iron County median wage and basic benefits.

### **Objective 3 – Improve employment opportunities through retention and expansion of existing businesses**

- 3.1 Encourage additional training, exit interviews and improvements in work environment for retention of good employees.
- 3.2 Provide businesses with information on specific use areas to enhance decision-making on relocation or expansion plans.
- 3.3 Collaborate with SUU and the SBDC to create a business incubator system that will provide educational and entrepreneurial opportunities for students, faculty, businesses and investors.

### **Objective 4 – Accumulate essential market research information**

- 4.1 Identify credible sources of information and update economic marketing materials including website, PDF File reports, PowerPoint presentations and fact sheets.
- 4.2 Conduct retail marketing studies every three years, or as needed.
- 4.3 Conduct affordable housing studies every three years, or as needed.

### **Objective 5 – Provide comprehensive marketing information to increase tourism**

- 5.1 Promote Iron County as a tourist gateway destination and continue to brand Cedar City as Festival City USA.
- 5.2 Enhance local media representation of business and community efforts through follow-up phone calls, internet presence, e-mail blasts, special events and press conferences.
- 5.3 Assist local Festivals with marketing and fund-raising (grants and sponsorships).

## **Objective 6 – Maintain and improve the infrastructure of Iron County to accommodate business and tourism growth**

- 6.1 Promote the Port 15 Utah industrial park project to potential businesses from the manufacturing, warehousing, and high tech sectors.
- 6.2 Encourage further development of industrial parks at the Cedar City Airport, Antelope Valley and Parowan.
- 6.3 Enhance commercial and private enplanements, as well as other business use of land available at the Cedar City Regional Airport.
- 6.4 Assist in marketing of proposed community projects including recreational and tourism facilities such as Brian Head Alpine Creek expansion, Community Recreation-Aquatics Center, Cedar Mountain Ball Field Complex, Utah Shakespearean Festival Centre for Performing Arts, and Cedar Breaks Visitor Center.

## **Objective 7 – Enhance the beautification and attractiveness of the community**

- 7.1 Maintain the signage and landscaping ant I-15 interchanges.
- 7.2 Encourage adherence to industrial park CC&Rs and high quality construction.

## **Kane County Strategies**

Kane County will be an active partner with other governments to foster a sustainable, broad-based economy which allows traditional economic uses to remain vibrant, while fostering new economic activities which expand economic opportunity, utilize available natural resources, and protect important scenic and social qualities.

## **Objective 1 – Retain, Expand and/or Diversify Existing Businesses**

- 1.1 Create household sustaining jobs which maintain or improve the quality of life for both residents and visitors.
  - A. Participate in pro-consumer education programs.
  - B. Assist in providing quality cultural and entertainment programs.
  - C. Encourage local banks to develop outreach programs for local businesses.
- 1.2 Promote destination tourism and explore flight tours over scenic landscapes.
- 1.3 Improve customer relations in county departments and services.
- 1.4 Participate in a county clearinghouse for business services.
- 1.5 Recognize the tie between affordable and quality housing and business growth.
- 1.6 Develop a “value-added” campaign which helps local businesses gain additional value from their existing products.
- 1.7 Explore the feasibility of air shuttle services.
- 1.8 Encourage the establishment of rental car services.

## **Objective 2 – Attract or Develop Self-Sustaining New Business which provide Quality Jobs**

- 2.1 Foster businesses related to the Grand Staircase - Escalante National Monument.  
Request that the administrative offices for the national monument be located in Kanab.
- 2.2 Develop a stock of commercial buildings.
- 2.3 Explore the feasibility of scheduled airline services.
- 2.4 Explore the feasibility of natural gas service.
- 2.5 Identify industries which have the best fit for Kane County.
- 2.6 Build a local venture capital base.
- 2.7 Develop a network of former residents and business contacts who can assist in bringing business to Kane County.
- 2.8 Encourage the establishment of small-scale forest product and mineral based businesses.

- 2.9 Investigate solar energy options.

### **Objective 3 – Develop and Maintain an Infrastructure that can Support a Robust Economy**

- 3.1 Assist in developing a regional industrial park in Kanab.
- 3.2 Direct business to locations with sufficient public services.
- 3.3 Develop and promote a multiple use recreation and other public service facility at the Kaneplex site.
- 3.4 Encourage the development of four-lane access through the county.

### **Objective 4 – Enhance Educational Opportunities**

- 4.1 Encourage high behavioral and academic standards.
- 4.2 Advocate a modified school year with work release options.
- 4.3 Participate in training activities for service sector owners and employees.
- 4.4 Partner in developing improved library services.
- 4.5 Support more community involvement in secondary schools.

### **Objective 5 – Strengthen Effective Communications**

- 5.1 Increase interaction with federal and state agencies to enhance economic development.
- 5.2 Increase communications between public officials and citizens.
- 5.3 Partner in the development of a regular public issues forum.
- 5.4 Foster the creation of a formal citizen's network.
- 5.5 Establish a Kane County Economic Development Coordinating Council.
- 5.6 Publicize public meeting agendas on local TV and radio outlets.

### **Objective 6 – Support the preparation of a Tourism Development Plan which includes a**

## **Washington County Strategies**

Workforce Development is a county priority with the largest population sector in the district. The Dixie Applied Technology College is focused on developing the AM—STEM program to implement this development. STEM prepares students in the high tech world of today's IT industries. Students apply science, technology engineering and math to maintain, connect, design, and protect computers. The Governor's Office of Economic Development –Rural Development is coordinating this effort with industry partner's driving the curriculum, and the Department of Workforce Services.

### **Objective 1 – Retain and Expand Businesses**

- 1.1 Facilitate an incentive program for existing businesses equivalent to what is offered to new businesses.
- 1.2 Provide an outreach effort to directly contact and assist existing businesses.
- 1.3 Develop and provide financing packages to assist in financing growth of existing businesses.
- 1.4 Facilitate conflict resolution between business and government.

### **Objective 2 – Business Attraction**

- 2.1 Coordinate with the various economic development agencies within the state.
- 2.2 Maintain a cutting-edge website promoting Washington County that is linked to other web sites featuring county businesses, organizations and events.
- 2.3 Identify value-added industry sectors and businesses for proactive recruitment activities.
- 2.4 Provide timely and pertinent information and facilitate productive site tours for value-added companies.

- 2.5 Facilitate incentives for targeted value-added companies.

### **Objective 3 – Develop Industrial and Business Sites**

- 3.1 Encourage School Trust Lands and private land owners to select lands suitable for industrial and business site development.
- 3.2 Utilize private and public funds to develop business and industrial parks, offering prime business sites with full amenities and incentive pricing.
- 3.3 Promote the need for construction of spec buildings to private contractors with cities and utilities offering delayed fees.
- 3.4 Acquire available federal and state funding for business and industrial site development.

### **Objective 4 – Transportation and Essential Services**

- 4.1 Regularly present information to elected officials on the status of key infrastructure services and their impact on value-added businesses within the county.
- 4.2 Promote a county-wide vision of the economic opportunities associated with the new replacement airport.
- 4.3 Promote and support enhancing and increasing water supply and distribution.
- 4.4 Promote increasing the capacity and redundancy of electrical power, natural gas, and telecommunication services to continually ensure adequate delivery systems.
- 4.5 Promote the need for an enhanced and expanded public transportation system.
- 4.6 Promote the need for more affordable workforce housing.
- 4.7 Recruit and retain the workforce vital to the community.

### **Objective 5 – Increase Technical and Advanced Education Services**

- 5.1 Promote the need for additional baccalaureate degrees to be offered by Dixie State University of Utah.
- 5.2 Technical training to identified industries is provided through specialized classes.
- 5.3 Expand offerings of concurrent enrollment through a partnership between Dixie State University of Utah and the Washington County School District.
- 5.4 Involve, align and coordinate technical programs with Dixie State University of Utah, Washington County School District, and Dixie Applied Technology College.
- 5.5 Promote and support the practice of acquiring land for schools early in the development cycle through participating in the Interagency School Site Council.

### **Objective 6 – Communicate and Promote the Strategic Plan**

- 6.1 Circulate executive summary of the Strategic Plan to public agencies and private business and organizations for reference and use in addressing economic development issues.
- 6.2 Review and update strategic plan annually.
- 6.3 Facilitate an annual Economic Summit.

### **Objective 7 – Increase Economic Development Capability**

- 7.1 Expand the organization and funding from the private sector for economic development activities by executing a well-organized private sector fund raising activity.
- 7.2 Promote policy of donating to Site Select Plus formerly Washington County Economic Development Council at the close of sale of industrial properties.

### **Paiute Indian Tribe of Utah Strategies**

The Governor of Utah signed an executive order July 30<sup>th</sup> 2014 to strengthen communication between state agencies and Utah's eight sovereign tribes. The order will further build on

consultation, communication and cooperation between state agencies and the tribes –specifically the government-to-government consultation relationship. The order directs each state agency to develop a formal consultation policy to ensure the state is contemplating actions that have tribal implications.

The unemployment rate in Utah is 3.5%. The unemployment rate for Native Americans was reported at 13.7% an unacceptable rate by the Governor. Tribal strategies for economic development such as the following will be considered as the drafting of the strategic plan gets underway:

- Development of a water system project at the north Kanarraville Interchange on I-15 for homes and commercial development.
- Development of RV campground adjacent to Shivwits new gas station.
- Development of properties along the I-15 corridor near Cove Fort and the north Kanarraville Interchange.
- Encourage a unified tribal CEDS to assess economic needs of Tribes in Utah.

## **C. REGIONAL TRANSPORTATION PLANNING**

### **Goals, Objectives, and Action Items**

The Five County Association of Governments (AOG) has been engaged along with local stakeholders in transportation planning in each of the Five Counties. One focus has been to organize Rural Planning Organizations (RPOs), to discuss rural transportation issues. Two RPOs have been organized within the region, The Eastern Washington County RPO and the Iron County RPO. The Eastern Washington County RPO was incorporated into the Dixie Metropolitan Planning Organization (DMPO). Other efforts looking at both rural and metropolitan issues are Coordinated Human Service Transportation Planning and Mobility Management efforts. The planning effort outlines strategies and the Mobility Management side is focused on implementation of those strategies. Among other things these two efforts have helped in the expansion of the SunTran bus system, a St. George system, which now will be available in cities in close proximity to St. George City for both commuter and modified routes. Staff has also helped: to organize van pools in outlying areas to help commuters get to and from work; to work with St. George City in adding shelters at bus stops; and utilized the internet to provide information to transit riders regarding routes and types of services available.

#### **Goal 1: Complete planning document for the Iron County RPO**

- Objective 1: determine roadways that need to be added and or upgraded to ensure safe traffic flow
- Objective 2: develop a list of projects to improve the roadways system within Iron County

#### **Goal 2: Enhance and expand available transportation services**

- Objective 1: Promote regional vanpool services to connect workers to job sites.
- Objective 2: Establish a flexible travel voucher program to fill gaps in the transportation network.
- Objective 3: Expand routes and para-transit of existing transit services to connect adjacent communities.
- Objective 4: Provide more accessible and comfortable bus facilities
- Objective 5: Prioritize funding to supplement operating expenses of existing transportation services.

### **Goal 3: Improve Coordination with public and private transportation providers**

- Objective 1: Coordinate human service and public transportation plans through the regional transportation planning process
- Objective 2: Coordinate with public and inter-city transportation providers, so that residents may more seamlessly travel between cities.
- Objective 3: Manage transportation assets in the region to prioritize needs.
- Objective 4: Develop partnerships to leverage funding.

### **Goal 4: Effectively connect individuals to available services**

- Objective 1: Administer a travel training program in cooperation with area transit services and human service agencies.
- Objective 2: Develop a central directory of information for those seeking transportation services.
- Objective 3: Utilize online mapping resources to connect individuals to available services.
- The Dixie Metropolitan Planning Organization (Dixie MPO) is designated by the state of Utah to oversee transportation planning in the urbanized and urbanizing areas in Utah's Washington County — historically known as “Utah's Dixie.” This charge includes road planning, transit planning, mobility management, and regional long-range planning.

Over the past several years the Dixie MPO has accomplished the following milestones:

- Merged with the Eastern Washington County Rural Planning Organization to now include urbanized areas from Ivins to LaVerkin and from St. George to Leeds.
- Published the 2011-2040 Dixie MPO Regional Transportation Plan and participated in Utah's Unified Transportation Plan. These plans are currently under review and will be completely revised and updated by 2015.
- Completed the Dixie MPO Regional Transit Study to guide communities outside the boundaries of St. George City through the process of extending transit services into their population centers. The cities of Ivins and Washington are moving through the process and may have local transit services by January 2015.
- Funded two major environmental studies to guide roadway widening and capacity-improvement efforts along Bluff Street in St. George and I-15 from the Arizona state line to the Hurricane Exit.

MPO Goals for the future include:

- Improving safety by reducing the number of crashes resulting in serious injuries and fatalities by two percent per year.
- Optimize Mobility by adding capacity, focusing on integrated transportation, providing traffic information, and increasing the availability of transportation modes (vehicle, transit, bicycle, and pedestrian) available to reach various destinations.
- Strengthen the Economy by focusing on lowering costs and increasing efficiency of regional transportation assets.

## **D. CEDS MISSION**

The mission of the Five County Association of Governments is to “Plan, Prepare and Partner” with federal, state and local governments to strengthen the role of southwestern Utah local officials in the execution of state and federal programs at the local level.

## **C. ECONOMIC DEVELOPMENT DEFINITION**

### **Focus Area: Natural Resources**

The environment is the region's most important asset and a major component of the region's quality of life. Protecting the natural resources is important to the residents and visitors to the region but it also make good business sense.

#### **Water:**

Availability of good-quality water is imperative for economic development. Some areas within the region are faced with uncertainty about long-term water supply that could impact future development potential. Some areas of concern in the EDD include the Virgin River basin and Beryl Junction basin. However, great strides are being made to ensure a sustainable water supply. Periodic drought cycles have negatively impacted the region's water supply. Water storage is also a major concern.

Additional water supply sources may have to be developed for continued growth and development in many parts of the EDD. Two-thirds of the incorporated communities in the EDD have public water supply systems, which serve approximately three fourth of the EDD population. Other areas are served by one or more private water companies. Perennial waters attract visitors for recreation, including fishing, swimming, and stream-side activities such as camping and hiking. Boating is also popular on Lake Powell as well as several of the smaller lakes and reservoirs in the EDD. Special designations may make some water bodies more attractive for recreation but may also limit other activities, such as grazing or mining on public lands adjacent to protected areas.

#### **Forests:**

New markets and technologies could be developed to utilize this resource. However, environmental regulations continue to be an obstacle to moving forward on this opportunity. The EDD continues its support of sustainable forest partnerships. Catastrophic wildfire reduction continues to be a focus of the district to reduce fuel loads and threats to human life. In addition, appropriately sized forest and wood product enterprises can be developed in a host of locations across the EDD, drawing on not only Ponderosa Pine but other under-utilized forest and woodland materials. The thinning program would restore the forest to a "fire-adapted" or low-density status. This would allow for wildlife and tourism to continue in the forests. The implementation of a lumber mill and partnership with the Forest Service and private investors to create much-needed jobs for sustainable forest partnerships.

The development of clusters of forest and wood product enterprises across the EDD would enable diversity of manufacturing while providing a service to federal land managers – consumers for the large volume of material treated and removed from these forests – thus reducing the economic burden of financing landscape scale, long-term treatment efforts in the EDD.

#### **Minerals:**

Mineral resources are available for mining in the EDD, and in some areas represent a major component of the economy. However, some of these, such as copper, iron and uranium, are also sensitive to market prices and therefore may not provide a steady base for development. There are opportunities within the EDD for mining development compatible with protecting the environment.

Agriculture Livestock grazing is the most widespread component of agriculture in southern Utah. Due to the relatively low productivity of land in the EDD, ranchers rely on the use of large tracts of public lands. Southern Utah also has some concentrated animal feeding operations such as pig farms in Milford , which is large pork producer in the Southwest. Iron County has commercial dairy farms. Irrigated agriculture has been locally important throughout the district.

**Gas:**

Natural gas is available in some areas and service continues to be introduced in new areas. In remote areas, the cost for delivering natural gas is an issue and the state continues to seek expansion in Kane County.

**Energy:**

Electricity is available in communities throughout the EDD. Continue to support power expansion in the remote off the power grid area of Ticaboo.

**Goals:**

1. Forest/Forage Work with state, regional, and national partners to ensure that the region's forests are healthy and sustainable.
2. Water and Air Quality Work with regional, state, and national partners to maintain water and air quality within the region.
3. Resource-Based Industries Develop and expand the resource-based economy and product development that is compatible with regional and local values/goals.
4. Renewable Energy See Focus Area: Renewable Industries
5. Wildlife/Domestic Animals Support wildlife and animal policies that address safety issues and habitat fragmentation.
6. Soils Support efforts and policies to manage and conserve the soil within the EDD.
7. Agriculture Encourage the inventory of existing and potential sustainable agriculture products and services that are compatible within the region.

**Objectives:**

1. Support value-added, sustainable energy and agricultural industries.
2. Support water resource conservation and development in the district.
3. Support expansion of industrial parks in rural counties.
4. FCAOG should continue to support EDD natural resource trainings for effective public lands management.
5. FCAOG should work with the Resource Conservation Districts and National Resource Conservation Services to support activities within the EDD.
6. Encourage the additional Forest Service Stewardship Contracting on areas needing reduced fuel loads. Stimulate local ideas related to small diameter timber resource use, highlight trends in the EDD's forest and wood product industry, share success stories of optimized industry efforts, and gain political support for projects when necessary.
7. Invite the U.S. Forest Service to report annually at FCAOG Steering Committee meetings on the progress of acres treated, contracts proposed, and problems faced.
8. Support the exploration of the use of new technologies to convert existing natural resources into energy products.
9. Support local and regional entities to address water adequacy issues.

## **Focus Area: Economic Foundations**

Physical infrastructure planning and development will continue to be an important effort for the EDD. The EDC provided technical assistance and support to several EDA grant projects in the region, such as the Cedar City airport runway expansion.

Broadband:

Infrastructure In 2014 a southwest regional broadband study was completed and the following findings were reported in the district.

The purpose of the Southwest Utah Regional Broadband Plan is to identify the primary needs to improve broadband Internet service and make recommendations that the public and private sector should pursue to meet these needs. A Regional Broadband Planning Council composed of representatives from various industry sectors served as the steering committee to the Regional Broadband Plan.

Broadband Internet service is a vital component to all facets of society in Southwest Utah, including education, healthcare, economic development, public safety and everyday communication. While broadband Internet service is provided throughout the majority of the region, some communities suffer from a lack of coverage and most struggle to provide adequate broadband services to meet the growing demand for bandwidth, redundancy and reliability.

The needs identified for broadband Internet vary according to location. In general, needs can be categorized by urban (St. George and Cedar City Areas), rural (Panguitch, Kanab, Milford and other small cities and towns) and frontier areas (Big Water, Boulder and other isolated communities and areas). In some areas, basic reliable broadband Internet is still not provided, while others need more redundant networks to attract and retain businesses.

To meet the growing need for broadband Internet service, the following priority recommendations were identified:

1. Development of detailed Broadband Plans for local jurisdictions
2. Disseminate information about broadband mapping tool to prospective businesses
3. Enhance broadband database to include available infrastructure and project schedules
4. Improve coordination with the Utah Education Network (UEN) to expand broadband access and capacity
5. Refine grant policies to provide broadband service for small providers in rural and isolated areas
6. State Liaison Program for cooperating with public land managers
7. Remove barriers and support the private sector to lead the charge to expand broadband infrastructure
8. Ongoing regional broadband coordination

## **RESIDENTS: FINDINGS**

- A variety of devices are used to access the Internet, including desktop computers, laptops, tablets and smart phones.
- The vast majority of respondents (86%) access the Internet at work, while 59% access the Internet at school and 40% at someone else's home.
- The majority of respondents are connected via DSL (34%), wireless (25%) or cable modem (24%) at home.
- Approximately 93% of respondents would like a faster Internet connection.

- In general, respondents felt that they are paying too much for the Internet service that they are provided with. The average price that respondents pay is \$48, while the average price that respondents feel would be reasonable is \$31. In 2011, the Utah Broadband Project conducted a statewide survey and residents responded that they were willing to pay an average of \$34 a month in urban areas and \$33 a month in rural areas, which is slightly higher than the results in this region.
- Many respondents (43%) combine or “bundle” Internet with phone or television services, but several expressed frustration with the bundle packages. They are only interested in Internet service and feel that Internet service is too expensive as a standalone service.
- The majority of respondents (87%) have expressed that since they first got high- speed Internet, the connection has either stayed the same or improved.
- When asked, 83% of respondents believe that both Internet speed and reliability for Internet service are equally important.

### **BUSINESSES: FINDINGS**

- A variety of businesses including construction, manufacturing, education and food services rely on broadband Internet for day- to- day operations, 96% communicate via email, 84% use it for website applications, 72% for banking and 60% for file sharing among other important uses.
- The majority of businesses are connected via fixed wireless (36%), DSL (32%), or fiber to the premises (27%).
- Approximately 67% of respondents indicated that they are satisfied with the cost of their Internet service that they are provided with, while 52% are satisfied with the connection speed.
- Only 9% of survey respondents would describe the availability of broadband as competitive with several options.

Transportation in Utah is faced with funding declines and a plethora of transportation needs. State transportation revenues have declined which has impacted municipal, county and state transportation budgets and programs.

### **Goals: Regional Planning and Strategic Development**

1. Strengthen partnerships within the EDD for strategic planning.
2. Physical Infrastructure Partner in the development of the physical infrastructure needed to support economic development.
3. Broadband Improve southern Utah’s access to Internet broadband.

### **Objectives:**

1. Support the community organizations in their efforts to complete economic and infrastructure improvements.
2. Pursue funding opportunities to enhance broadband capabilities and other leading edge telecommunication technology.
3. Provide assistance to local communities in the development of local broadband strategic plans that include addressing barriers, strategies for implementation and the 2014 southwest plan’s update.
4. Provide support to retain and expand air service within the EDD.
5. Pursue funding to support infrastructure and transportation projects.

6. Collaborate with UDOT on the update of the Utah Long-Range Transportation Plan to enhance regional economic development opportunities through transportation system improvements and investments.
7. Support the expansion of existing and the establishment of new public transit programs throughout the region to improve connections between communities and activity centers, and access to jobs, educational facilities, and training opportunities.
8. Facilitate implementation of the 2014 consolidated plan for housing in the region.

## **V. ROLES AND RESPONSIBILITIES**

Implementation of the CEDS required a coordinated, focused effort. The plan recognizes that in order for the region to be successful in economic development, community coordination, and a strong public/private partnership must be established. A clear understanding of roles and responsibilities is important. Additionally, relationships are strengthened by good communication. The CEDS is based on creating and maintaining a sustainable standard of living and high quality of life for the region. Following is a list of success objectives that will assist in implementation.

### **Coordinated Approach**

All entities involved in economic development must work together to achieve mutually agreed upon goals to ensure a sustainable effort.

### **Regional Coordination**

A comprehensive understanding of the region and collaborating with entities throughout the region (e.g., federal agencies, incorporated communities) is critical.

### **Community Growth**

The regional environment is a tremendous asset that should be protected for community and economic development reasons. The region must take great strides in addressing resource issues, such as water, to ensure long-term sustainability.

### **Long-Term Efforts**

Economic development is not a one-shot activity. Success requires long-term investments (e.g., infrastructure and telecommunications) as well as continued focused effort and evaluation.

### **Wired Communities**

The EDD facilitates the investment in telecommunication infrastructure that supports the ability of local business enterprises and other entities to succeed by providing open access to information and resources that is critical for regional success.

### **Local Focus**

The EDD supports existing enterprises while looking at diversifying the regional economic base. Existing businesses are the region's most valuable assets because they are already contributing to the regional economy and quality of life. They are also the best source of business expansion and local job growth.

## **Corporate Responsibility**

The EDD encourages enterprises to work as civic partners, contributing to the region where they operate, protecting the natural environment, and providing workers with good pay, benefits, and opportunities for upward mobility, within a healthful working environment.

## **Human Investment**

The human resources within the EDD are so valuable in the information age and the area will strive to provide life-long skills and learning opportunities by investing in excellent schools, post-secondary institutions, and opportunities for continuous education and training that are available to all.

## **A. FCAOG's ROLES and RESPONSIBILITIES**

The following are key roles and responsibilities for FCAOG in economic development.

- Serve as the regional coordinating entity through the Steering Committee.
- Address regional economic development issues through the EDD.
- Plan for regional transportation through the Technical Committee for Transportation and the Transportation Policy Advisory Committee.
- Address social service needs through four Social Service Planning Committees (i.e. by county). They also serve as the Human Services Committee.
- Support the Area Agency on Aging.
- Address workforce issues through the Department of Work Force Services.
- Oversee an effective revolving loan fund through the Revolving Loan Program Committee.

## **B. ECONOMIC DEVELOPMENT COMMITTEE ROLES and RESPONSIBILITIES**

The following are EDC's key roles and responsibilities:

- Promote workforce development and training partnerships that provide business retention and expansion in the EDD.
- Support the expansion of improved infrastructure including broadband access in the region that leads to increased jobs, technology and long-term economic benefit.
- Serve as southern Utah's voice for economic development initiatives in the state.
- Continue to support efforts to sustain and grow tourism within the EDD.
- Strengthen partnerships with agencies such as the Bureau of Land Management and the Dixie National Forest in their efforts serve southern Utah.
- Support sub-regional groups throughout the EDD in their local economic development efforts.
- Support regional and sub-regional public works projects that align with the EDD's goals and priorities.
- Annually review the CEDS, adopt a work program and work collaboratively on work program implementation.
- Periodically update the FCAOG CEDS.

## **C. PARTNERING AGENCIES**

Economic development cannot be done alone. The following is a listing of the entities that play a role in economic and community development.

- Local and Regional Economic Development Organizations
- There are a number of local and regional economic development organizations in southern Utah that actively pursue economic development. The EDC coordinates and communicates with these entities and facilitates mutual economic development opportunities.

- Your Utah, Your Future Within the EDD, many of the communities will complete the Governor's vision process that estimates an additional 2.5 million people in Utah by 2030. The EDC will work closely with any communities desiring to implement local strategic plans for economic development and encourage cooperative partnerships within the EDD on mutual strategies.
- Transportation Planning Organizations Ensuring a strong multimodal transportation system throughout the region is critical to successful community and economic development. The EDD works closely with regional Transportation Planning Organizations, Metropolitan Planning Organizations, and Regional Transportation Committees to ensure that mutual issues are addressed.
- Workforce Investment Areas Workforce development is a key focus area for the region. The EDC coordinates on mutual activities with the Workforce Investment Areas in each of the five counties and the Piute Indian Tribe of Utah.

Other Partners There are many different organizations that the EDD will partner with to ensure CEDS implementation. Some of these include:

- Cities, Towns and Counties
- Indian Nations
- Federal Agencies
- Southern Utah University
- Small Business Development Centers
- Chambers of Commerce
- Resource Conservation Districts
- State Agencies
- Dixie State University
- Utah State University
- Site Select Plus
- Arizona Strip Regional Planning Task Force
- National Association of Development Organizations, National Association of County Organizations

## **VI. ANNUAL EVALUATION**

The success of any plan or planning effort is measured by how it is implemented. The FCAOG CEDS 2014 – 2019 serves as the blueprint for the regional economic development efforts. However, it is critical to monitor how the CEDS is put into action. It is the primary responsibility of the FCAOG Steering Committee and Economic Development District (EDD) to monitor the CEDS implementation.

Following are the steps to ensure accountability for CEDS implementation.

1. FCAOG adopts the CEDS 2014 - 2015.
2. Present the CEDS Update to other FCAOG Boards and Committees as appropriate.
3. Share the document as a resource document with other entities within the region.
4. Conduct presentations annually to sub regional groups about the status of the plan and solicit input into the update.
5. The EDD annually reviews all goals and strategies and producing a Work Program that is submitted to EDA.

The FCAOG CEDS Update process encourages more coordination in the region, with federal land agencies, and with the state. The resultant plan provides clear direction for the EDD to focus its efforts. The coordination process will continue through plan implementation.

## **A. PERFORMANCE MEASURES**

The inclusion of performance measures in the updated plan provides an important tool for specific review and monitoring procedures that will provide the EDD mechanism to monitor the regional economy and update the CEDS. The EDD will continue to monitor the following performance measures:

- Number of jobs created as a result of the CEDS implementation
- Number and types economic investments made throughout the EDD economy
- Number of jobs retained within the EDD
- Changes in the EDD Region

## **B. STATE OF UTAH ECONOMIC PLAN COORDINATION**

The State of Utah currently does not have a unified economic development plan that it is implementing. However, FCAOG and the EDD work very closely with the Governor's Rural Partnership Board (the state's rural economic development agency) as well as the Governor's Office of Economic Development. The Governor has Economic Development specialists and policy advisors that coordinate economic issues within the EDD. As the State of Utah begins any effort to establish a unified economic development plan, the FCAOG will play an active role.

# Appendix

- I. Health Care Industry Brief
- II. Leisure Industry Brief
- III. Manufacturing Industry Brief
- IV. Transportation Industry Brief
- V. Utilities Industry Brief
- VI. 2014 Utah Coal Study

# health care industrybrief



[jobs.utah.gov/employer](http://jobs.utah.gov/employer)

Beaver, Garfield, Iron, Kane and Washington Counties

Summer 2014



## Health Care and Social Assistance Employment and Wages

Industry Name (Code)	2013 Employment	2013 Average Monthly Wage	Dec. 2012 to Dec. 2013 Percent Change in Employment
Health care and social assistance (62)	10,367	\$3,052	5.2%
Ambulatory health care services (621)	3,663	\$3,236	2.3%
Offices of physicians (6211)	1,312	\$4,843	1.6%
Offices of dentists (6212)	974	\$2,287	4.3%
Other health practitioners (6213)	583	\$2,207	5.9%
Outpatient care centers (6214)	171	\$3,979	-3.4%
Medical and diagnostic laboratories (6215)	26	\$2,521	-16.7%
Home health care services (6216)	474	\$2,000	17.6%
Social Assistance (624)	1,228	\$1,511	9.6%
Individual and family services (6241)	746	\$1,752	17.3%
Child day care services (6244)	200	\$1,036	0.0
Total area nonfarm payroll jobs	74,325	\$2,500	4.0%
Health care and social assistance as a percent of total	13.9%	122.1%	

## Largest Employers

1. Intermountain Healthcare
2. Kolob Regional Care and Rehabilitation
3. Red Rock Canyon School
4. Southwest Center
5. Diamond Ranch Academy
6. Cinnamon Hills Youth Crisis Center
7. Beaver Valley Hospital
8. Red Cliffs Health and Rehabilitation
9. Kane County Hospital
10. Children's Discovery Learning Center
11. Second Nature Entrada
12. Central Utah Medical Clinic
13. Home Health Services
14. Danville Handicap Services
15. Hildale Health Service Center
16. Coral Desert Rehabilitation
17. Kindred Nursing Centers West
18. Redcliff Ascent
19. Emeritus Corporation
20. Biolife Plasma
21. Beehive Homes of Washington County

Source: Utah Department of Workforce Services

Data is compiled quarterly; hence the most recent full-year data is available for the previous year and shows the general level of the industry employment.

## Health Care and Social Assistance History

Year	Employment	Average Monthly Wage	Percent of Utah Average Monthly Wage	Number of Establishments	Payrolls (Millions)	Percent of Total Area Jobs	Percent of Total Area Wages
2008	9,435	\$2,822	90.4%	563	\$319.5	12.4%	14.9%
2009	9,522	\$2,946	92.9%	586	\$336.7	13.6%	16.8%
2010	9,636	\$2,962	91.6%	608	\$342.5	14.1%	17.4%
2011	9,699	\$3,062	92.7%	637	\$356.4	14.0%	17.6%
2012	9,850	\$3,038	89.7%	646	\$359.3	13.8%	17.0%
2013	10,367	\$3,052	89.2%	744	\$379.7	13.9%	17.0%

Source: Utah Department of Workforce Services



# health care industrybrief



## Health Care and Social Assistance Jobs in Demand *Southwest Area*

Occupation Code	Occupation Title	Number of Employees	Inexperienced Hourly Wage	Median Hourly Wage
29-1111	Registered nurses	1,266	\$22.20	\$27.50
31-1012	Nursing aides, orderlies and attendants	799	\$9.80	\$11.10
31-9092	Medical assistants	461	\$10.10	\$12.90
43-6013	Medical secretaries	353	\$11.50	\$13.70
31-9091	Dental assistants	337	\$11.10	\$13.40
43-4171	Receptionists and information clerks	782	\$8.10	\$9.80
29-1069	Physicians and surgeons, all other	142	\$80.90	\$90.30
29-2021	Dental hygienists	267	\$26.90	\$31.30
43-9061	Office clerks, general	1,763	\$8.30	\$10.80
43-6014	Secretaries and administrative assistants, except legal, medical and executive	1,618	\$11.40	\$14.00
29-2061	Licensed practical and licensed vocational nurses	124	\$14.40	\$18.70
29-2011	Medical and clinical laboratory technologists	54	NA	NA
43-4051	Customer service representatives	1,289	\$8.50	\$10.70
29-2071	Medical records and health information technicians	64	\$10.90	\$14.20
11-9111	Medical and health services managers	137	\$28.00	\$38.60
37-2012	Maids and housekeeping cleaners	1,587	\$8.10	\$9.10
29-2037	Radiologic technologists and technicians	131	\$12.40	\$15.10
29-2012	Medical and clinical laboratory technicians	NA	\$12.40	\$15.10
43-1011	First-line supervisors of office and administrative support workers	663	\$14.00	\$18.50
31-1011	Home health aides	318	\$9.40	\$10.80
29-1123	Physical therapists	94	\$26.00	\$40.00
43-3031	Bookkeeping, accounting and auditing clerks	836	\$10.50	\$14.60

\*Occupational counts represent statewide employment  
N/A - Not Available

Source: Utah Department of Workforce Services

### Total Payroll Jobs December 2013

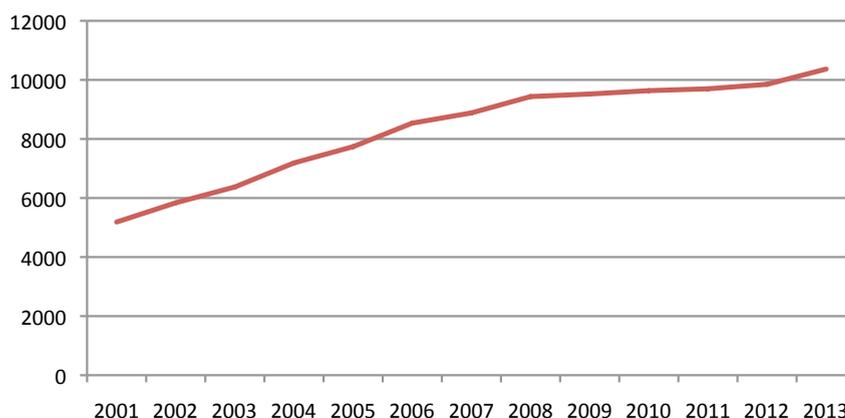
Statewide	1,323,722
Southwest	75,333 5.7%

### Health Care and Social Assistance Jobs December 2013

Statewide	133,685
Southwest	10,354 7.7%

Source: Utah Department of Workforce Services

### Health Care and Social Assistance, Southwest



Source: Utah Department of Workforce Services

#### Equal Opportunity Employer/Program

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# leisure industrybrief



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Beaver, Garfield, Iron, Kane and Washington Counties

Summer 2014



## Leisure and Hospitality Employment and Wages

Industry Name (Code)	2013 Employment	2013 Average Monthly Wage	Dec. 2012 to Dec. 2013 Percent Change in Employment
Leisure and hospitality (71, 72)	12,029	\$1,294	6.4%
Arts, entertainment and recreation (71)	1,383	\$1,294	-1.5%
Performing arts, spectator sports and related industries (711)	276	\$1,880	-28.0%
Museums, historical sites and similar institutions (712)	17	\$1,202	14.3%
Amusement, gambling and recreation industries (713)	1,090	\$1,325	3.9%
Accommodation and food services (72)	10,646	\$1,276	7.5%
Accommodation (721)	3,472	\$1,598	4.0%
Food services and drinking places (722)	7,174	\$1,120	9.1%
<b>Total area nonfarm payroll jobs</b>	<b>74,325</b>	<b>\$2,500</b>	<b>4.0%</b>
Leisure and hospitality as a percent of total	16.2%	51.8%	

### Largest Employers

1. Ruby's Inn
2. Tuacahn Center for the Arts
3. Red Mountain Spa
4. Aramark Sports
5. GMRI, Inc.
6. Brian Head Resort
7. RBG, Inc. (Wendy's)
8. Xanterra Parks and Resorts
9. Wittwer Management
10. Canyon Land Development
11. Subway
12. Entrada
13. Taco Bell
14. The Lodge at Bryce Canyon
15. Green Valley Resort
16. Fitness Ridge (The Biggest Loser Resort)
17. McDonalds
18. Cracker Barrel
19. Carl's Jr.
20. Texas Roadhouse
21. Jimmy Johns

Source: Utah Department of Workforce Services

Data is compiled quarterly; hence the most recent full-year data is available for the previous year and shows the general level of the industry employment.

## Leisure and Hospitality History

Year	Employment	Average Monthly Wage	Percent of Utah Average Monthly Wage	Number of Establishments	Payrolls (Millions)	Percent of Total Area Jobs	Percent of Total Area Wages
2007	10,935	\$1,175	38.6%	605	\$154.1	14.0%	7.1%
2008	10,941	\$1,180	37.8%	610	\$154.9	14.4%	7.2%
2009	10,595	\$1,167	36.8%	624	\$148.4	15.1%	7.4%
2010	10,480	\$1,241	38.4%	634	\$156.0	15.4%	7.9%
2011	10,874	\$1,250	37.8%	645	\$163.1	15.7%	8.0%
2012	11,404	\$1,288	38.0%	654	\$176.3	16.0%	8.3%
2013	12,029	\$1,294	37.8%	680	\$186.8	16.2%	8.4%

Source: Utah Department of Workforce Services



# leisure industrybrief



## Leisure and Hospitality Jobs in Demand *Southwest Area*

Occupation Code	Occupation Title	Number of Employees	Inexperienced Hourly Wage	Median Hourly Wage
35-3021	Combined food preparation and serving workers, including fast food	2,000	\$8.00	\$8.70
35-3031	Waiters and waitresses	1,710	\$8.10	\$8.80
35-2014	Cooks, restaurant	790	\$8.10	\$10.30
35-1012	First-line supervisors of food preparation and serving workers	560	\$9.90	\$13.20
37-2012	Maids and housekeeping cleaners	1,590	\$8.10	\$9.10
35-2011	Cooks, fast food	300	\$8.00	\$8.80
35-9021	Dishwashers	370	\$8.00	\$8.50
41-2011	Cashiers	2,640	\$8.20	\$9.00
43-4081	Hotel, motel and resort desk clerks	720	\$8.20	\$9.60
35-2021	Food preparation workers	350	\$8.00	\$9.30
35-9031	Hosts and hostesses, restaurant, lounge and coffee shop	290	\$8.10	\$8.60
39-3091	Amusement and recreation attendants	220	\$8.10	\$8.70
35-9011	Dining room and cafeteria attendants and bartender helpers	300	\$8.10	\$8.90
35-3011	Bartenders	130	NA	NA
39-9031	Fitness trainers and aerobics instructors	70	\$14.20	\$17.70
49-9071	Maintenance and repair workers, general	750	\$10.30	\$16.10
11-1021	General and operations managers	1,270	\$16.70	\$30.90
53-3031	Driver/sales workers	300	\$8.00	\$9.30
35-3022	Counter attendants, cafeteria, food concession and coffee shop	150	\$8.10	\$8.70
37-2011	Janitors and cleaners, except maids and housekeeping cleaners	1,010	\$8.10	\$9.60
33-9032	Security guards	190	\$9.20	\$11.40
11-9051	Food service managers	80	\$18.20	\$22.80

\*Occupational counts represent statewide employment  
N/A - Not Available

Source: Utah Department of Workforce Services

### Total Payroll Jobs December 2013

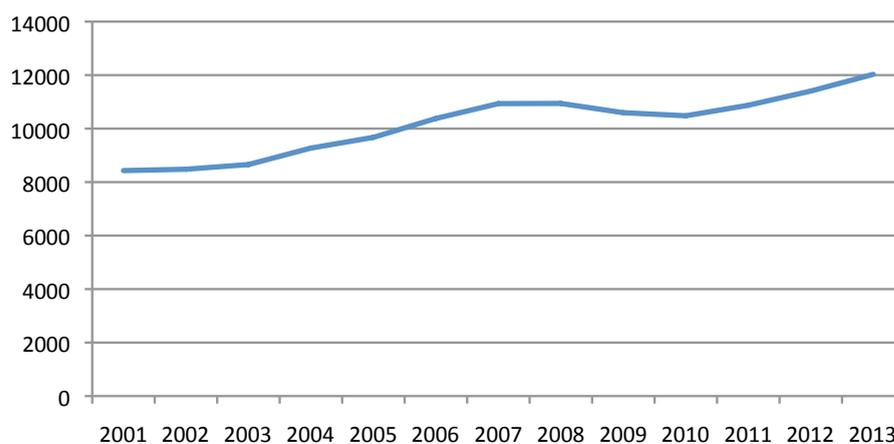
Statewide	1,323,722
Southwest	75,333 5.7%

### Leisure and Hospitality Payroll Jobs December 2013

Statewide	133,685
Soduthwest	11,276 8.4%

Source: Utah Department of Workforce Services

### Leisure and Hospitality, Southwest



Source: Utah Department of Workforce Services

#### Equal Opportunity Employer/Program

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# manufacturing industry brief



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Beaver, Garfield, Iron, Kane and Washington Counties

Summer 2014



## Manufacturing Employment and Wages

Industry Name (Code)	2013 Employment	2013 Average Monthly Wage	Dec. 2012 to Dec. 2013 Percent Change in Employment
<b>Manufacturing (31-33)</b>	<b>4,134</b>	<b>\$3,121</b>	<b>3.1%</b>
Food manufacturing (311)	253	\$2,728	-3.1%
Beverage and tobacco product manufacturing (312)	26	\$1,824	-13.6%
Wood product manufacturing (321)	188	\$2,241	19.6%
Printing and related support activities (323)	67	\$2,336	17.7%
Chemical manufacturing (325)	322	\$4,368	10.8%
Plastics and rubber products manufacturing (326)	433	\$2,962	6.7%
Nonmetallic mineral product manufacturing (327)	350	\$2,941	-38.8%
Fabricated metal product manufacturing (332)	767	\$3,192	18.4%
Architectural and structural metals (3323)	303	\$3,508	27.2%
Machinery manufacturing (333)	95	\$3,280	28.2%
Computer and electronic product manufacturing (334)	365	\$3,732	-7.8%
Transportation equipment manufacturing (336)	259	\$3,139	11.7%
Furniture and related product manufacturing (337)	294	\$2,490	38.1%
Miscellaneous manufacturing (339)	401	\$3,042	1.5%
Medical equipment and supplies (3391)	51	\$3,095	-7.4%
Sign manufacturing (33995)	139	\$3,165	0.0%
<b>Total area nonfarm payroll jobs</b>	<b>74,325</b>	<b>\$2,500</b>	<b>4.0%</b>
<b>Manufacturing as a percent of total</b>	<b>5.6%</b>	<b>124.8%</b>	

## Largest Employers

1. Genpak
2. Wilson Electronics
3. RAM Manufacturing
4. American Pacific Corporation
5. Smead Manufacturing
6. Metalcraft Technologies
7. Sunroc Corporation
8. Deseret Laboratories
9. Express Metal Fabricators
10. Litehouse
11. Stampin' Up
12. Western Quality Foods
13. Reid Ashman Manufacturing
14. North America Packaging Corp.
15. SKF USA, Inc.
16. Cerro Flow Products
17. LV Swiss, Inc.
18. S & S Steel Fabrication
19. Rainbow Sign and Design
20. WL Plastics Corporation
21. Heritage Plastics West

Source: Utah Department of Workforce Services

Data is compiled quarterly; hence the most recent full-year data is available for the previous year and shows the general level of the industry employment.

## Manufacturing History

Year	Employment	Average Monthly Wage	Percent of Utah Average Monthly Wage	Number of Establishments	Payrolls (Millions)	Percent of Total Area Jobs	Percent of Total Area Wages
2008	5,043	\$2,867	91.9%	293	\$173.5	6.6%	8.1%
2009	4,081	\$2,932	92.5%	275	\$143.6	5.8%	7.1%
2010	3,754	\$2,952	91.3%	257	\$133.0	5.5%	6.8%
2011	3,920	\$3,014	91.2%	255	\$141.8	5.7%	7.0%
2012	4,068	\$3,082	91.0%	266	\$150.4	5.7%	7.1%
2013	4,134	\$3,121	91.2%	269	\$154.8	5.6%	6.9%

Source: Utah Department of Workforce Services

Department of Workforce Services



# manufacturing industrybrief



## Manufacturing Jobs in Demand

Southwest Area

Occupation Code	Occupation Title	Number of Employees	Inexperienced Hourly Wage	Median Hourly Wage
51-2092	Team assemblers	280	\$9.70	\$13.50
51-1011	First-line supervisors of production and operating workers	220	\$15.40	\$21.00
53-7062	Laborers and freight, stock and material movers, hand	610	\$8.30	\$10.90
51-4041	Machinists	130	\$12.10	\$16.20
51-9111	Packaging and filling machine operators and tenders	80	\$10.10	\$13.90
11-1021	General and operations managers	1,270	\$16.70	\$30.90
41-4012	Sales representatives, wholesale and manufacturing, except technical and scientific products	550	\$11.60	\$20.70
51-9061	Inspectors, testers, sorters, samplers and weighers	60	\$12.00	\$15.10
53-7051	Industrial truck and tractor operators	100	\$9.10	\$13.60
51-4121	Welders, cutters, solderers and brazers	190	\$13.90	\$16.70
51-2022	Electrical and electronic equipment assemblers	NA	NA	NA
51-9198	Helpers and production workers	160	\$8.10	\$9.00
53-7064	Packers and packagers, hand	360	\$8.50	\$13.20
51-4081	Multiple machine tool setters, operators and tenders, metal and plastic	NA	NA	NA
51-5112	Printing press operators	70	\$12.60	\$13.80
43-5071	Shipping, receiving and traffic clerks	180	\$10.30	\$13.40
53-3032	Heavy and tractor-trailer truck drivers	1,270	\$13.20	\$18.30
43-9061	Office clerks, general	1,760	\$8.30	\$10.80
43-4051	Customer service representatives	1,290	\$8.50	\$10.70
17-2141	Mechanical engineers	40	\$30.30	\$41.60
51-3092	Food batchmakers	40	\$8.00	\$8.90
49-9041	Industrial machinery mechanics	50	\$13.90	\$20.40

\*Occupational counts represent statewide employment  
N/A - Not Available

Source: Utah Department of Workforce Services

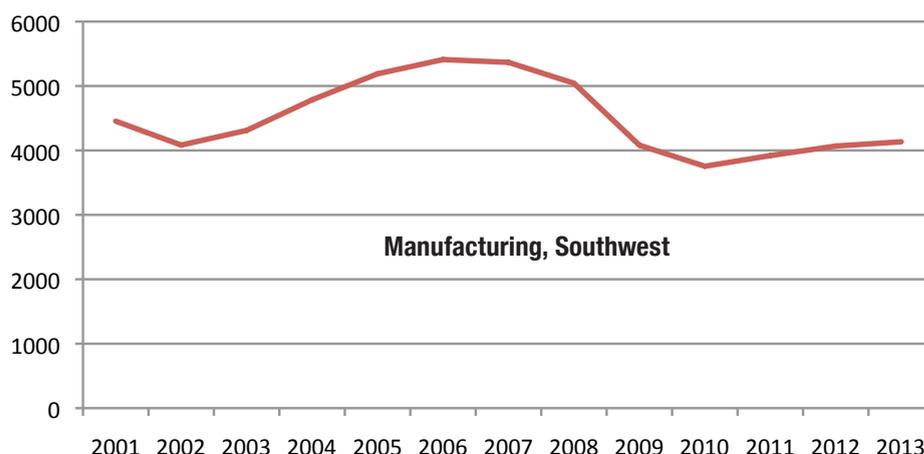
### Total Payroll Jobs December 2013

Statewide	1,323,722
Southwest	75,333 5.7%

### Manufacturing Payroll Jobs December 2013

Statewide	119,924
Southwest	4,200 3.5%

Source: Utah Department of Workforce Services



Source: Utah Department of Workforce Services

Equal Opportunity Employer/Program

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# transportation industrybrief



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Beaver, Garfield, Iron, Kane and Washington Counties

Summer 2014



## Transportation and Warehousing Employment and Wages

Industry Name (Code)	2013 Employment	2013 Average Monthly Wage	Dec. 2012 to Dec. 2013 Percent Change in Employment
Transportation and warehousing (48, 49)	3,226	\$3,485	1.4%
Truck Transportation (484)	1,230	\$2,816	-1.0%
General Freight Trucking (4841)	982	\$2,850	2.9%
Specialized Freight Trucking (4842)	248	\$2,682	-14.7%
Transit and ground passenger transportation (485)	189	\$1,835	10.0%
Support activities for transportation (488)	199	\$2,593	16.1%
Couriers and messengers (492)	219	\$4,218	-7.3%
<b>Total area nonfarm payroll jobs</b>	<b>74,325</b>	<b>\$2,500</b>	<b>4.0%</b>
Transportation and warehousing as a percent of total	4.3%	139.4%	

Source: Utah Department of Workforce Services

Data is compiled quarterly; hence the most recent full-year data is available for the previous year and shows the general level of the industry employment.

## Largest Employers

1. Wal-Mart (Distribution Center)
2. Skywest Airlines
3. Andrus Transportation Services
4. United Parcel Service
5. Union Pacific Railroad
6. Parke Cox Trucking Company
7. St. George Executive Shuttle
8. American Logistics (CCSI)
9. Parks Transportation, Inc.
10. Extension Logistics
11. Dixie Clean Sweep
12. MST Trucking
13. Clark Bradshaw Trucking
14. SAST Trucking
15. Federal Express
16. Huntsman AG Service
17. Tuf Transport Services
18. Host Transportation, Inc.
19. Miller Gordon
20. Mountain West Milk Transport
21. Greyhound Line

## Transportation and Warehousing History

Year	Employment	Average Monthly Wage	Percent of Utah Average Monthly Wage	Number of Establishments	Payrolls (Millions)	Percent of Total Area Jobs	Percent of Total Area Wages
2007	3,253	\$3,334	109.6%	220	\$130.1	4.2%	6.0%
2008	3,243	\$3,217	103.1%	215	\$125.2	4.3%	5.9%
2009	3,165	\$3,197	100.8%	209	\$121.4	4.5%	6.0%
2010	3,074	\$3,377	104.4%	202	\$124.6	4.5%	6.3%
2011	3,230	\$3,363	101.7%	220	\$130.3	4.7%	6.4%
2012	3,230	\$3,383	99.9%	237	\$131.1	4.5%	6.2%
2013	3,226	\$3,485	101.8%	226	\$134.9	4.3%	6.1%

Source: Utah Department of Workforce Services



# transportation industrybrief



## Transportation and Warehousing Jobs in Demand *Southwest Area*

Occupation Code	Occupation Title	Number of Employees	Inexperienced Hourly Wage	Median Hourly Wage
53-3032	Heavy and tractor-trailer truck drivers	1,270	\$13.20	\$18.30
53-7062	Laborers and freight, stock, and material movers, hand	610	\$8.30	\$10.90
53-3033	Light truck or delivery services drivers	530	\$8.10	\$11.30
43-4181	Reservation and transportation ticket agents and travel clerks	30	\$8.30	\$10.40
53-7051	Industrial truck and tractor operators	100	\$9.10	\$13.60
53-2031	Flight attendants	NA	NA	NA
53-2011	Airline pilots, copilots, and flight engineers	NA	NA	NA
43-5071	Shipping, receiving, and traffic clerks	180	\$10.30	\$13.40
53-7063	Machine feeders and offbearers	NA	NA	NA
49-3031	Bus and truck mechanics and diesel engine specialists	210	\$15.20	\$21.30
43-4051	Customer service representatives	1,290	\$8.50	\$10.70
43-5032	Dispatchers, except police, fire and ambulance	250	\$13.30	\$18.10
43-9061	Office clerks, general	1,760	\$8.30	\$10.80
43-5081	Stock clerks and order fillers	790	\$8.20	\$10.00
53-1021	First-line supervisors of helpers, laborers and material movers, hand	90	\$16.70	\$21.90
11-1021	General and operations managers	1,270	\$16.70	\$30.90
49-3011	Aircraft mechanics and service technicians	NA	NA	NA
43-1011	First-line supervisors of office and administrative support workers	660	\$14.00	\$18.50
53-3041	Taxi drivers and chauffeurs	160	\$9.30	\$10.70
53-1031	First-line supervisors of transportation and material-moving machine and vehicle operators	110	\$14.00	\$22.30
53-7064	Packers and packagers, hand	360	\$8.50	\$13.20
43-6014	Secretaries and administrative assistants, except legal, medical and executive	1,620	\$11.40	\$14.00

\*Occupational counts represent statewide employment  
N/A - Not Available

Source: Utah Department of Workforce Services

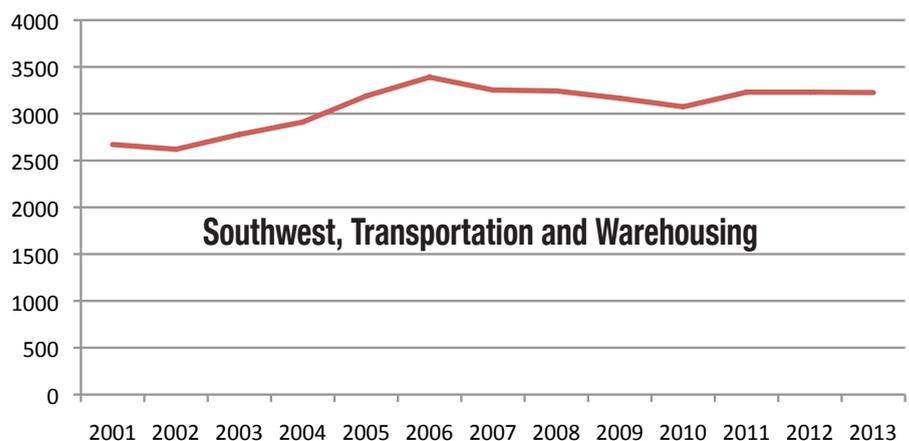
### Total Payroll Jobs December 2013

Statewide	1,323,722
Southwest	75,333 5.7%

### Transportation and Warehousing Payroll Jobs December 2012

Statewide	49,470
Southwest	3,275 6.6%

Source: Utah Department of Workforce Services



Source: Utah Department of Workforce Services

#### Equal Opportunity Employer/Program

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# utilities industrybrief



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Beaver, Garfield, Iron, Kane and Washington Counties

Summer 2014



## Utilities Employment and Wages

Industry Name (Code)	2013 Employment	2013 Average Monthly Wage	Dec. 2012 to Dec. 2013 Percent Change in Employment
Utilities (22)	324	\$5,808	-1.3%
Utilities (221)	413	\$5,339	0.2%
Electric power generation, transmission and distribution (2211)	223	\$6,607	-1.4%
Natural gas distribution (2212)	64	\$5,592	0.0%
Water, sewage and other systems (2213)	38	\$1,441	-2.7%
Total area nonfarm payroll jobs	74,325	\$2,500	4.0%
Utilities as a percent of total	0.4%	232.3%	

Source: Utah Department of Workforce Services

Data is compiled quarterly; hence the most recent full-year data is available for the previous year and shows the general level of the industry employment.

## Largest Employers

1. PacifiCorp
2. Dixie Escalante Power
3. Garkane Energy Cooperative
4. City of St. George
5. Questar Gas Company
6. Warren Energy Group
7. Ash Creek Special Service District
8. Raser Technologies
9. City of Washington
10. Kane County Water Conservancy District
11. Central Iron County Water Conservancy District

## Utilities History

Year	Employment	Average Monthly Wage	Percent of Utah Average Monthly Wage	Number of Establishments	Payrolls (Millions)	Percent of Total Area Jobs	Percent of Total Area Wages
2007	259	\$5,392	177.2%	32	\$16.8	0.3%	0.8%
2008	272	\$5,414	173.5%	32	\$17.7	0.4%	0.8%
2009	275	\$5,466	172.4%	32	\$18.0	0.4%	0.9%
2010	288	\$5,765	178.3%	32	\$19.9	0.4%	1.0%
2011	304	\$5,808	175.7%	35	\$21.2	0.4%	1.0%
2012	310	\$5,673	167.5%	36	\$21.1	0.4%	1.0%
2013	324	\$5,808	169.7%	37	\$22.6	0.4%	1.0%

Source: Utah Department of Workforce Services



# utilities industrybrief



## Utilities Jobs in Demand *Southwest Area*

Occupation Code	Occupation Title	Number of Employees	Inexperienced Hourly Wage	Median Hourly Wage
49-2095	Electrical and electronics repairers, powerhouse, substation and relay	NA	NA	NA
49-9051	Electrical power-line installers and repairers	80	\$18.70	\$33.70
51-8013	Power plant operators	60	\$25.70	\$32.50
17-2071	Electrical engineers	NA	NA	NA
51-8031	Water and wastewater treatment plant and system operators	120	\$15.40	\$19.50
49-1011	First-line supervisors of mechanics, installers and repairers	180	\$19.00	\$26.00
51-8012	Power distributors and dispatchers	NA	NA	NA
49-9012	Control and valve installers and repairers, except mechanical door	NA	NA	NA
11-1021	General and operations managers	1,270	\$16.70	\$30.90
43-9061	Office clerks, general	1,760	\$8.30	\$10.80
43-5041	Meter readers, utilities	NA	\$16.80	\$24.60
13-2011	Accountants and auditors	520	\$16.10	\$22.50
17-3023	Electrical and electronics engineering technicians	NA	NA	NA
43-6014	Secretaries and administrative assistants, except legal, medical and executive	1,620	\$11.40	\$14.00
13-1051	Cost estimators	90	\$17.00	\$26.20
13-1111	Management analysts	90	\$13.40	\$24.50
47-2111	Electricians	200	\$16.10	\$20.50
51-8092	Gas plant operators	NA	NA	NA
43-3031	Bookkeeping, accounting and auditing clerks	840	\$10.50	\$14.60
43-3011	Bill and account collectors	90	\$9.70	\$11.60
15-1133	Software developers, systems software	NA	NA	NA
51-8021	Stationary engineers and boiler operators	NA	NA	NA

\*Occupational counts represent statewide employment  
N/A - Not Available

Source: Utah Department of Workforce Services

### Total Payroll Jobs December 2013

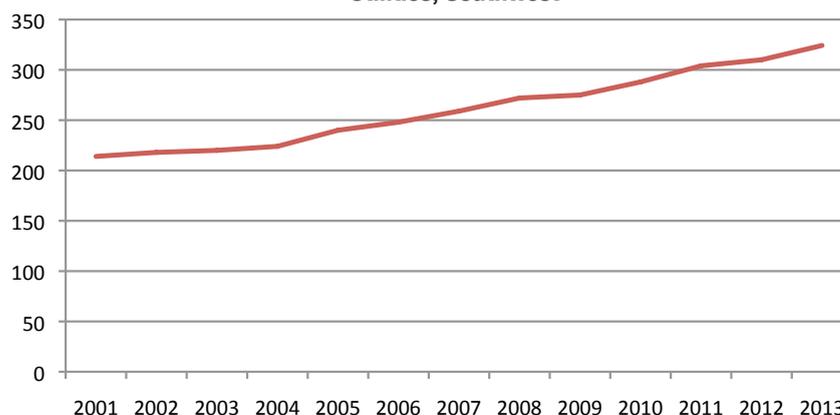
Statewide	1,323,722
Southwest	75,333 5.7%

### Utilities Payroll Jobs December 2013

Statewide	3,855
Southwest	313 8.1%

Source: Utah Department of Workforce Services

### Utilities, Southwest



Source: Utah Department of Workforce Services

#### Equal Opportunity Employer/Program

Auxiliary aids and services are available upon request to individuals with disabilities by calling 801-526-9240. Individuals with speech or hearing impairments may call the Relay Utah by dialing 711. Spanish Relay Utah: 1-888-346-3162.