



# Five County Association of Governments

(Southwestern Utah's Economic Development district)  
Comprehensive Economic Development Strategy Update 2020-2025

Beaver

Garfield

Iron

Kane

Washington



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(Southwestern Utah's Economic Development District)  
Comprehensive Economic Development Strategy Update  
2020-2025

## 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 2020 – 2025

**Contents**

I. INTRODUCTION .....	5
A. CEDS Update Process.....	7
B. FCAOG Steering Committee.....	7
C. FCAOG Economic Development Committee.....	7
II. EDD ECONOMIC ANALYSIS .....	10
A. REGIONAL PROFILE .....	10
B. REGIONAL PARTNERSHIPS .....	26
C. BEAVER COUNTY .....	29
D. GARFIELD COUNTY.....	32
E. IRON COUNTY.....	35
F. KANE COUNTY .....	38
G. WASHINGTON COUNTY .....	41
H. ECONOMIC OUTLOOK.....	47
I. REGIONAL HAZARDS and MITIGATION .....	52
Natural Hazard Mitigation Plan 2017-2022 .....	52
Flood .....	52
Landslide .....	53
Severe Weather .....	54
Wildfire.....	54
Problem Soils.....	54
Drought .....	55
Radon Gas .....	55
Earthquake.....	56
J. ENVIRONMENT .....	57
K. ECONOMIC RESILIENCY .....	65
L. Area Sector Analysis Process (ASAP) .....	68
III. CHALLENGES AND OPPORTUNITIES.....	71
Strengths, Weaknesses, Opportunities, Threats.....	71
B. Demographic Shifts.....	72



C. Natural Resource Pressures .....	73
D. Opportunity Zones.....	73
IV. CEDS PLAN OF ACTION.....	77
A. CEDS VISION and GOALS.....	77
B. Action Plan .....	79
C. CEDS MISSION .....	88
D. ECONOMIC DEVELOPMENT DEFINITION .....	88
V. ROLES AND RESPONSIBILITIES .....	93
A. FCAOG’s ROLES and RESPONSIBILITIES.....	94
B. ECONOMIC DEVELOPMENT COMMITTEE ROLES and RESPONSIBILITIES .....	94
C. PARTNERING AGENCIES .....	94
VI. ANNUAL EVALUATION .....	96
A. PERFORMANCE MEASURES .....	96
Appendix .....	98

## 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 2020 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 [bthiriot@fivecounty.utah.gov](mailto:bthiriot@fivecounty.utah.gov).

### **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 major tasks:

- 1) Refine the District Comprehensive Economic Development Strategy (CEDS);
- 2) Implement entrepreneurship strategies from the Fueling Economic Growth Through Entrepreneurship regional study;
- 3) Regional entrepreneurship development through coordination of local and regional economic development partners;
- 4) Continue to partner with the Atwood Innovation Plaza, the Southern Utah University Entrepreneurial Center, the SBDC at Dixie Technical College, and Southwest Technical College;
- 5) Assist in local economic development efforts to promote a stable and diversified economic base;
- 6) Coordinate with the activities, programs, and efforts of the emerging base of local economic development professionals (EDP's);
- 7) Strengthen ties to the economic development efforts of the Paiute Tribe of Utah; and
- 8) Foster the emerging role of local officials as Cooperating Agencies in public lands management process.
- 9) Partner with and/or support the Counties in the EDD with their efforts to utilize the Utah Rural County Grant Program.
- 10) Work with recreation and tourism entities and initiatives to further economic development in the EDD.

### **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.

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 2020-2025 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 2020-2025 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  
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
Carolyn White	Beaver County School District	Elected Board Member <sup>1</sup>
Jerry Taylor	Garfield County	Commissioner
Melani Torgersen	Escalante City	Mayor
Frank Houston	Garfield County School District	Elected Board Member <sup>1</sup>
Paul Cozzens	Iron County	Commissioner
Maile Wilson-Edwards	Cedar City	Mayor
Dale Brinkerhoff	Iron County School Board	Elected Board Member <sup>1</sup>
Lamont Smith	Kane County	Commissioner
Robert Houston	Kanab City	Mayor
Lisa Livingston	Kane County School District	Elected Board Member <sup>1</sup>
Gil Almquist	Washington County	Commissioner
John Bramall	Hurricane City	Mayor
LaRene Cox	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>		
Henrie Walton	Dixie State University	Assistant to the President for Government & Community Relations
Stephen Lisonbee	Southern Utah University	Executive 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>		
Robert Pyles	Economic Development Professional	Commission Assistant/Economic Development
Jeremy Waite	Higher Education	Small Business -- Regional Services
Kaden Figgins	Economic Development Professional	County Planner/Economic Development
Rusty Hughes	Economic Development Professional	Interim Executive Director
Tyce Palmer	Conservation District	Zone Coordinator
Don Willie	Chamber of Commerce	President and CEO
Danny Stewart	Economic Development Professional	Director
Mark Ecohawk	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
Jerimiah Riley	Precise Law	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 39 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 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 dormant volcanoes, mountains, great lava fields, and mesas. Geologic forces have uplifted huge portions of the land and have created great rifts in others. Of notoriety are 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 irrigated. Native to the valleys throughout much of the region are varieties of grasses, junipers, and pinion pines; 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**

Air moving from the Pacific Ocean is forced to rise over the Sierra Nevada Mountain Range, which causes it to cool and precipitate, leaving very little moisture for the region directly East of the Sierra Nevada's. While the Intermountain West is generally dry due to this phenomenon, the aridity in southwestern Utah is accentuated by high temperatures, causing much of the water to be evaporated. 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 and is part of the Mojave Desert, which is unique to the state of Utah. 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 lay within higher elevations and is considered "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.

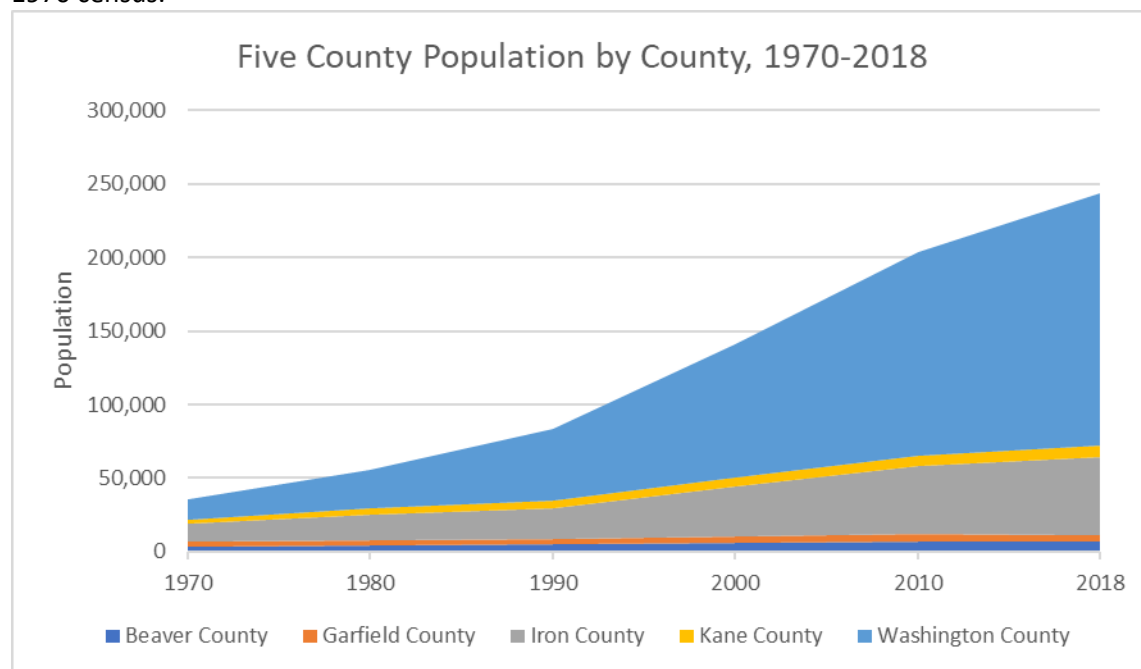
Like the rest of the Intermountain West, during the winter, most precipitation results from the passage of mid-latitude cyclones, while in the summer, convection from localized heating can trigger isolated thunderstorms. Without the moderating effects of the ocean, and therefore, cloud cover from water 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 rare tornadoes occurrences. The higher elevations always have the potential for blizzards, cold spells, and avalanches in the winter. The entire region is susceptible to human and natural caused fires.

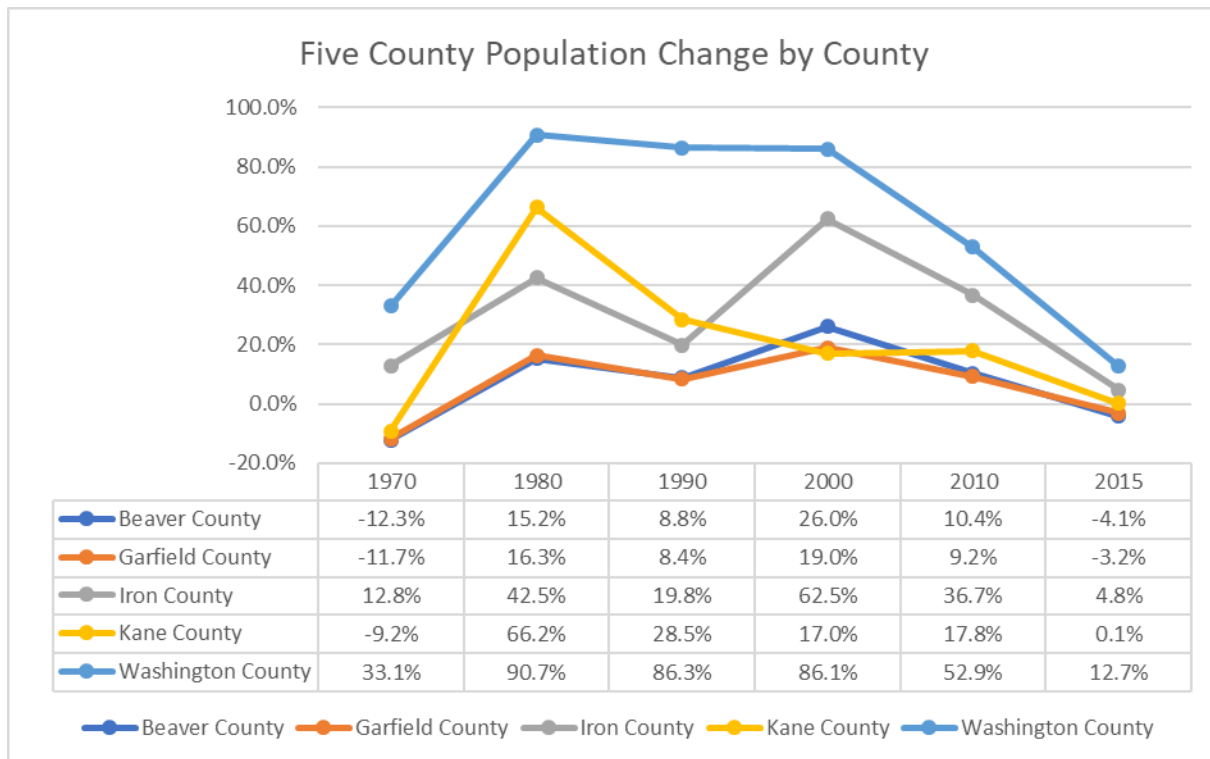
### Demographics and Population

Over the past 48 years, the southwest region has experienced extraordinary population growth. From 1970 to 2018, population in the region increased at an average annual rate of 4.14 percent. The number of persons living in southwest Utah totaled 243,844, an increase of 208,620 persons since the 1970 census.



Source: U.S. Census Bureau; Utah History Encyclopedia, Governor's Office of Management & Budget; 2018 ACS

The bulk of the growth in the region is centered in Washington County, with some spillover into Iron County, and to a much lesser extent Kane County. 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 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 2017 was 31,979, or 14.36 percent of total population. This is significantly lower than the statewide share of 21.0 percent. According to the 2017 ACS 65.9 percent of the minorities in the region are Hispanic.

The EDD of Five County encompasses over 11 million acres of land in southwestern Utah. The Association serves 39 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	Antimony	Brian Head	Alton	Apple Valley
Milford	Boulder	Cedar City	Big Water	Enterprise
Minersville	Bryce Canyon City	Cedar Highlands	Glendale	Hildale
	Cannonville	Enoch	Kanab	Hurricane
	Escalante	Kanarraville	Orderville	Ivins
	Hatch	Paragonah		LaVerkin
	Henrieville	Parowan		Leeds
	Panguitch			New Harmony
	Tropic			Rockville
				St. George
		<b>Paiute Indian</b>		Santa Clara
		<b>Tribe of Utah</b>		Springdale
		Cedar Band		Toquerville
		Indian Peaks Band		Virgin
		Shivwits Band		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 39 incorporated communities, and the Paiute Indian Tribe of Utah that includes the Cedar, Indian Peaks, and Shivwits Band. The EDD includes 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 Staircase-Escalante National Monument.



The following National Parks and Recreation Areas have an economic impact in the Five County region. The following numbers may not reflect all the dollars spent in the region, but each of the following parks have a large impact in the Region.

- In 2018, 4.3 million park visitors spent an estimated \$246 million in local gateway regions while visiting Zion National Park. These expenditures supported a total of 4,130 jobs, \$95.6 million in labor income, \$168 million in value added, and \$327 million in economic output in local gateway economies surrounding Zion National Park.” (National Park Service, Social Science, Visitor Spending Effects – Economic Contributions of National Park Visitor Spending)
- “In 2018, 2.7 million park visitors spent an estimated \$227 million in local gateway regions while visiting Bryce Canyon National Park. These expenditures supported a total of 3,290 jobs, \$85.2 million in labor income, \$151 million in value added, and \$275 million in economic output in local gateway economies surrounding Bryce Canyon National Park.” (National Park Service, Social Science, Visitor Spending Effects – Economic Contributions of National Park Visitor Spending)
- “In 2018, 645 thousand park visitors spent an estimated \$41.7 million in local gateway regions while visiting Cedar Breaks National Monument. These expenditures supported a total of 579 jobs, \$15.0 million in labor income, \$26.6 million in value added, and \$48.3 million in economic output in local gateway economies surrounding Cedar Breaks National Monument.” (National Park Service, Social Science, Visitor Spending Effects – Economic Contributions of National Park Visitor Spending)
- “In 2018, 6.4 million park visitors spent an estimated \$947 million in local gateway regions while visiting Grand Canyon National Park. These expenditures supported a total of 12.6 thousand jobs, \$377 million in labor income, \$673 million in value added, and \$1.2 billion in economic output in local gateway economies surrounding Grand Canyon National Park.” (National Park Service, Social Science, Visitor Spending Effects – Economic Contributions of National Park Visitor Spending)
- “In 2018, 4.2 million park visitors spent an estimated \$411 million in local gateway regions while visiting Glen Canyon National Recreation Area. These expenditures supported a total of 5,030 jobs, \$160 million in labor income, \$279 million in value added, and \$483 million in economic output in local gateway economies surrounding Glen Canyon National Recreation Area.” (National Park Service, Social Science, Visitor Spending Effects – Economic Contributions of National Park Visitor Spending)

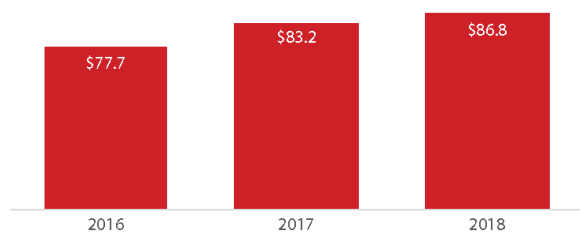
Tourism has a direct and indirect impact on the economy in the EDD. In 2018 there were 11,720 jobs directly due to tourism and 3,205 jobs indirectly due to tourism. There was a 9.4% increase in direct tourism jobs in the EDD over from 2016 to 2018. It is anticipated that tourism will continue to increase in the area and should be planned for accordingly. It is likely that the COVID-19 pandemic will cause tourism to fall in 2020 and will affect the economy. The county tourism reports are below.

## Beaver County, 2018

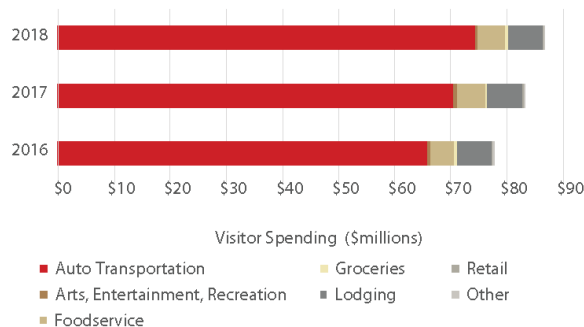
### Spending

In 2018, visitors directly spent an estimated \$86.8 million in Beaver County, a 4.3% increase from 2017.<sup>1</sup> The top three spending categories were auto transportation, lodging, and foodservice. Beaver County visitor spending made up 1.1% of total statewide spending.

Direct Spending Estimates (millions of dollars)



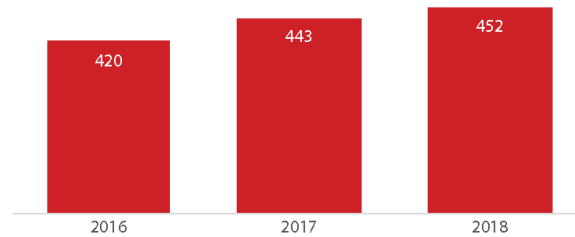
Direct Spending Estimates by Spending Category



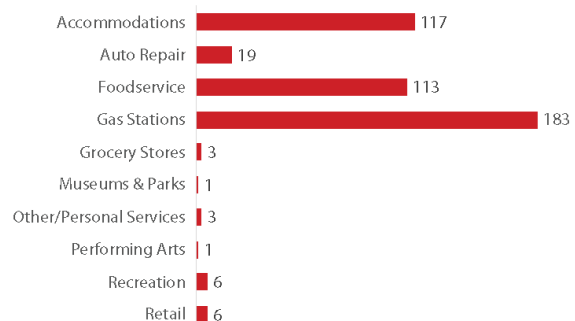
### Jobs

Visitor spending supported 452 direct Beaver County travel and tourism jobs, a 2.1% increase from 2017. Gas stations, accommodations, and foodservice were the top three job sectors. These 452 direct travel and tourism jobs supported an additional 66 indirect and induced jobs in the county for a total of 518 jobs.<sup>2</sup>

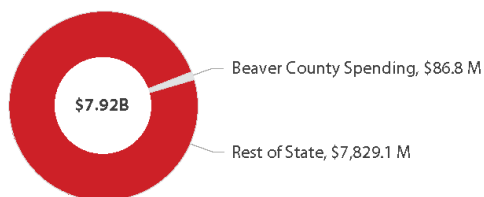
Direct Travel & Tourism Jobs



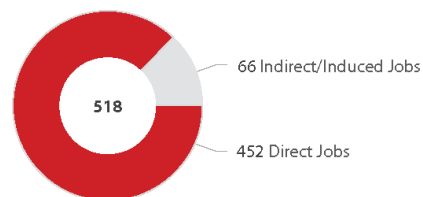
Direct Travel & Tourism Jobs by Job Type, 2018



Beaver Portion of Statewide Visitor Spending, 2018



Total Travel & Tourism Jobs, 2018



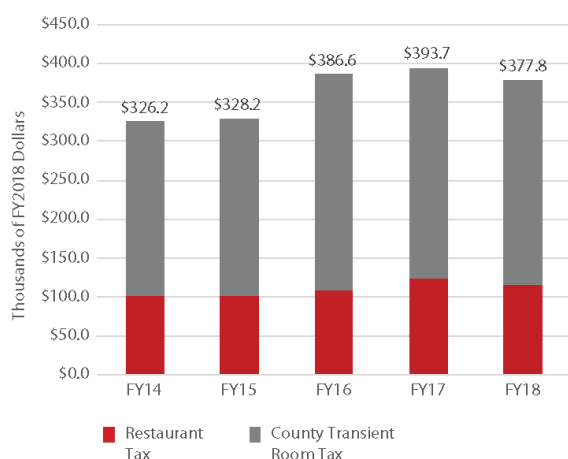
INFORMED DECISIONS™

## Tax Revenue

Visitor spending generated \$3.7 million in direct tax revenue, including \$2.2 million in state and \$1.5 million in local tax revenue.<sup>3</sup> Visitor spending generated approximately \$664,300 in additional indirect and induced state and local tax revenue, for a total of \$4.4 million.<sup>4</sup>

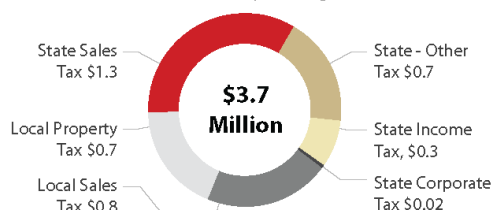
Travel and tourism-related sales tax revenue examples include transient room tax and restaurant tax. In fiscal year 2018, Beaver County collected a total of \$377,000 in these two sales taxes combined, down 4.0% from 2017 and up 15.8% over the past five years.<sup>5</sup>

### Select Local Sales Tax Revenues



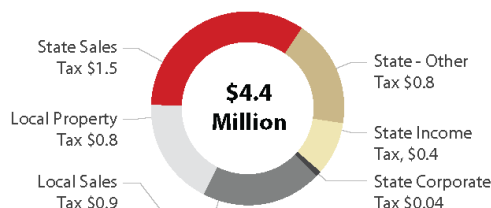
## Direct Tax Revenue, 2018

(Based on \$86.8 million in direct spending)

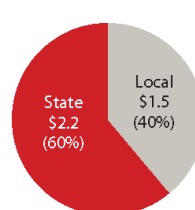


## Total Tax Revenue, 2018

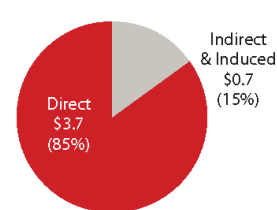
(Based on \$104.2 million in total spending)<sup>6</sup>



## Direct Tax Revenue, 2018



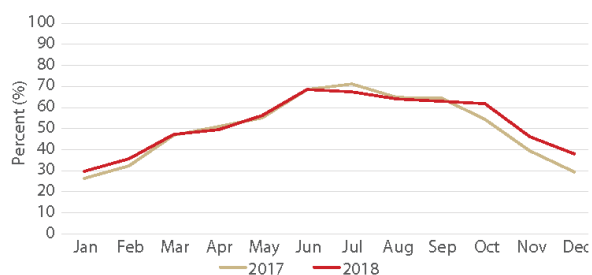
## Total Tax Revenue, 2018



## Hotel Data

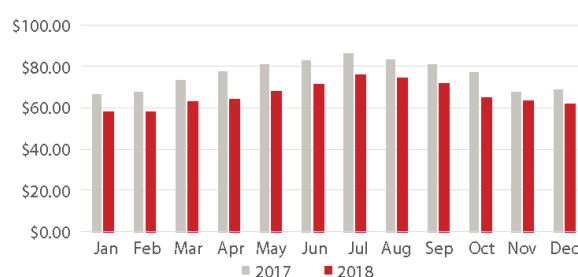
Beaver County hotel occupancy rates averaged 52.3% in 2018 compared to 50.4% in 2017. June, July, August, and September (in that order) had the highest average occupancy rates.

### Average Hotel Occupancy Rate



In 2018, Beaver County's average daily room rate was \$66.20 compared to \$76.12 in 2017, a 13.0% year-over-year decrease.

### Average Hotel Daily Room Rate



## Endnotes

- 1 This spending figure does not include public transportation spending (i.e. transportation fares and travel reservation costs).
- 2 When Utah visitors purchase from Utah businesses, the businesses hire employees and purchase from other local businesses, who in turn hire employees and purchase from other local businesses. These rounds of activity produce indirect employment effects. Then, direct and indirect employees spend a portion of their wages in the local economy, spurring additional "induced" effects.

- 3 State tax revenue includes sales, personal income, fuel, corporate income and other taxes; local tax revenues include sales, property, and other taxes.

- 4 See note #2 regarding "indirect and induced."

- 5 Adjusted for inflation. Total spending includes direct spending in addition to indirect and induced spending effects (see note #2).

- 6 Total spending includes direct spending plus indirect and induced spending effects (see note #2).

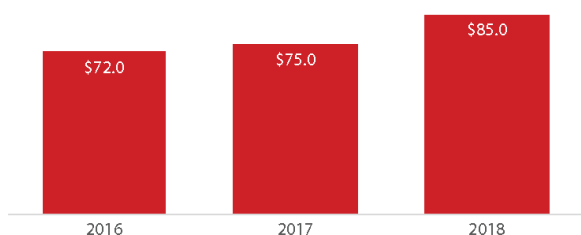
Kem C. Gardner Policy Institute analysis of U.S. Travel Association, U.S. Bureau of Labor Statistics, Utah State Tax Commission, VisaVue®, U.S. Bureau of Economic Analysis, and STR, Inc., data. Republication or other re-use of STR, Inc. data without the express written permission of STR, Inc. is strictly prohibited.

## Garfield County, 2018

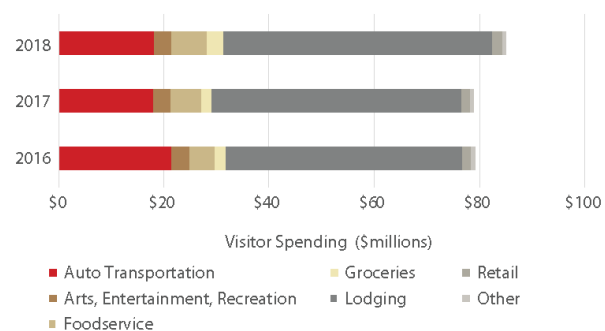
### Spending

In 2018, visitors directly spent an estimated \$85.0 million in Garfield County, a 13.4% increase from 2017.<sup>1</sup> The top three spending categories were lodging, auto transportation, and foodservice. Garfield County visitor spending made up 1.1% of total statewide spending.

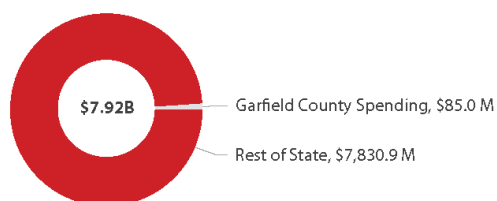
Direct Spending Estimates (millions of dollars)



Direct Spending Estimates by Spending Category



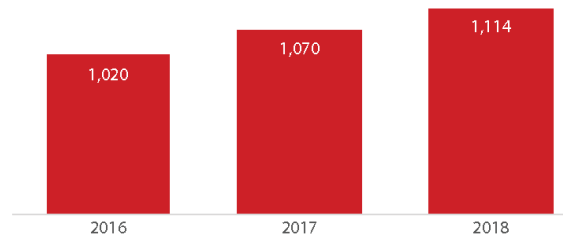
Garfield Portion of Statewide Visitor Spending, 2018



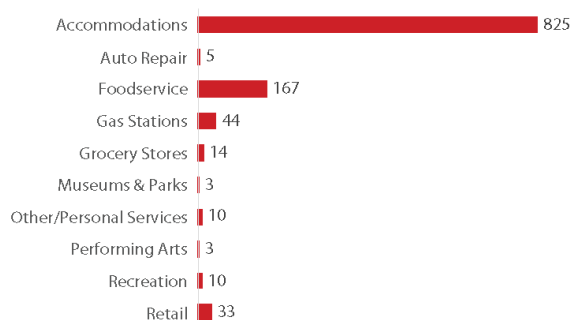
### Jobs

Visitor spending supported 1,114 direct Garfield County travel and tourism jobs, a 4.1% increase from 2017. Accommodations, foodservice, and gas stations were the top three job sectors. These 1,114 direct travel and tourism jobs supported an additional 213 indirect and induced jobs in the county for a total of 1,327 jobs.<sup>2</sup>

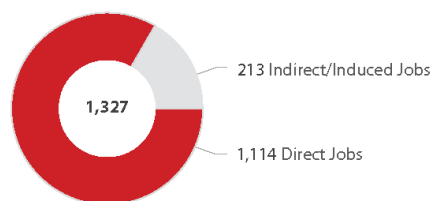
Direct Travel & Tourism Jobs



Direct Travel & Tourism Jobs by Job Type, 2018



Total Travel & Tourism Jobs, 2018



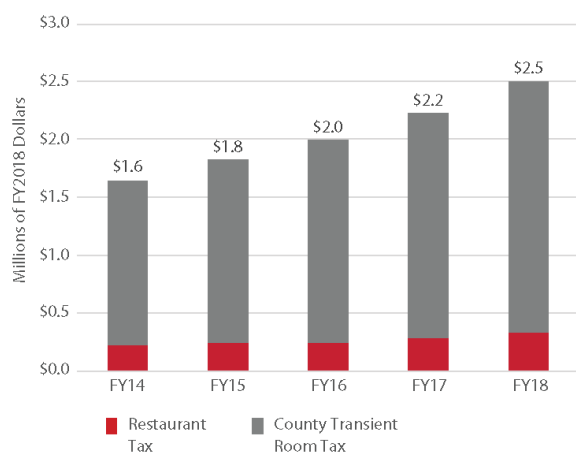
INFORMED DECISIONS™

## Tax Revenue

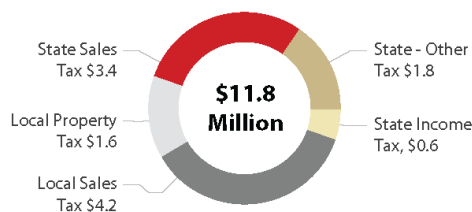
Visitor spending generated \$11.8 million in direct tax revenue, including \$5.9 million in state and \$5.8 million in local tax revenue.<sup>3</sup> Visitor spending generated approximately \$2.3 million in additional indirect and induced state and local tax revenue, for a total of \$14.1 million.<sup>4</sup>

Travel and tourism-related sales tax revenue examples include transient room tax and restaurant tax. In fiscal year 2018, Garfield County collected a total of \$2.5 million in these two sales taxes combined, up 12.1 percent from 2017 and 51.8 percent over the past five years.<sup>5</sup>

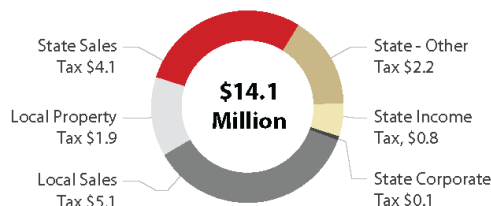
### Select Local Sales Tax Revenues



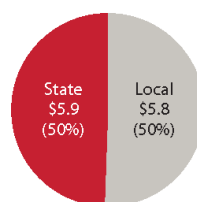
### Direct Travel & Tourism Tax Revenue, 2018 (Based on \$85.0 million in direct spending)



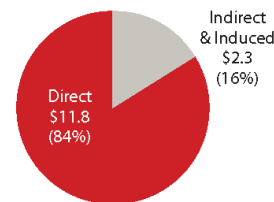
### Total Travel & Tourism Tax Revenue, 2018 (Based on \$105.5 million in total spending)<sup>6</sup>



### Direct Tax Revenue, 2018



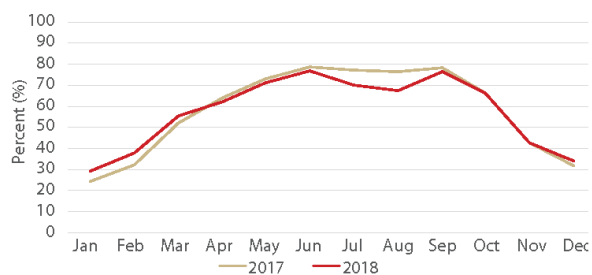
### Total Tax Revenue, 2018



## Hotel Data

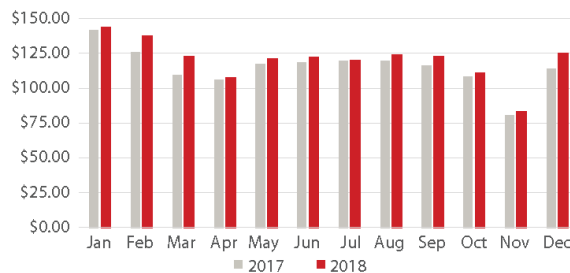
Garfield, San Juan, and Wayne counties' combined hotel occupancy rates averaged 57.5% in 2018 compared to 58.2% in 2017. June, September, May, and July (in that order) had the

### Average Hotel Occupancy Rate



highest average occupancy rates. In 2018, Garfield, San Juan, and Wayne counties' combined average daily room rate was \$120.28 compared to \$114.85 in 2017, a 4.7% year-over-year increase.

### Average Hotel Daily Room Rate



## Endnotes

- 1 This spending figure does not include public transportation spending (i.e. transportation fares and travel reservation costs).
- 2 When Utah visitors purchase from Utah businesses, the businesses hire employees and purchase from other local businesses, who in turn hire employees and purchase from other local businesses. These rounds of activity produce indirect employment effects. Then, direct and indirect employees spend a portion of their wages in the local economy, spurring additional "induced" effects.

- 3 State tax revenue includes sales, personal income, fuel, corporate income and other taxes; local tax revenues include sales, property, and other taxes.

- 4 See note #2 regarding "indirect and induced."

- 5 Adjusted for inflation. Total spending includes direct spending in addition to indirect and induced spending effects (see note #2).

- 6 Total spending includes direct spending plus indirect and induced spending effects (see note #2).

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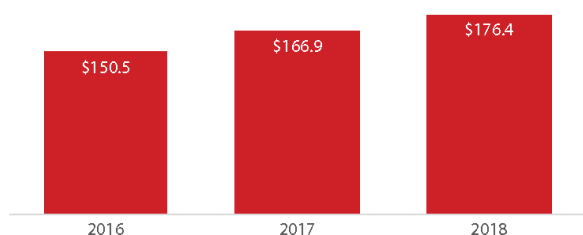


## Iron County, 2018

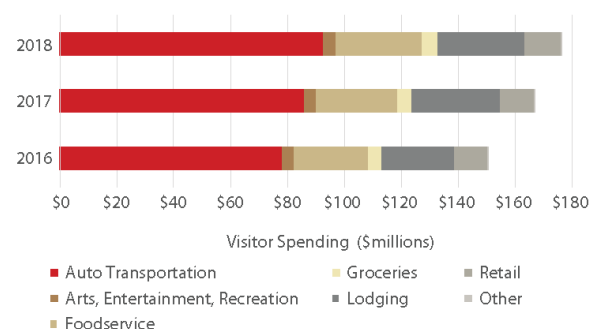
### Spending

In 2018, visitors directly spent an estimated \$176.4 million in Iron County, a 5.7% increase from 2017.<sup>1</sup> The top three spending categories were auto transportation, lodging, and foodservice. Iron County visitor spending made up 2.2% of total statewide spending.

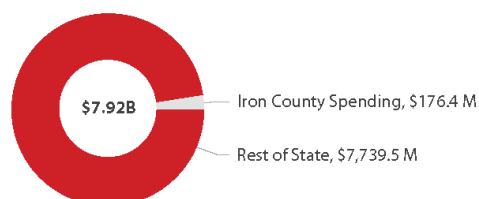
Direct Spending Estimates (millions of dollars)



Direct Spending Estimates by Spending Category



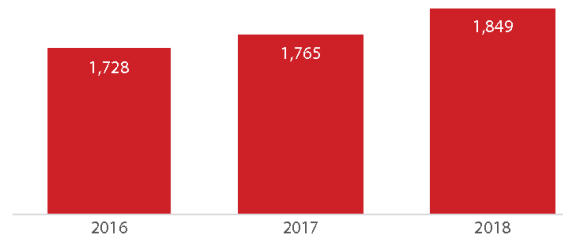
Iron Portion of Statewide Visitor Spending, 2018



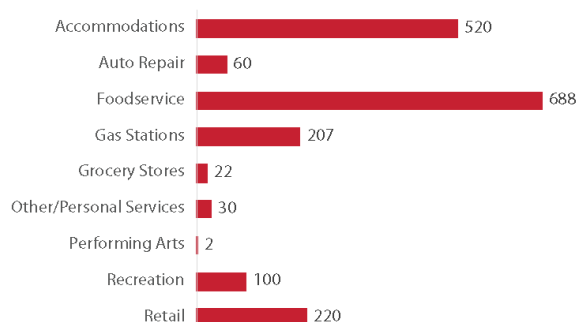
### Jobs

Visitor spending supported 1,849 direct Iron County travel and tourism jobs, a 4.7% increase from 2017. Foodservice, accommodations, and retail were the top three job sectors. These 1,849 direct travel and tourism jobs supported an additional 422 indirect and induced jobs in the county for a total of 2,271 jobs.<sup>2</sup>

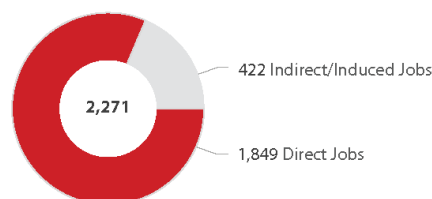
Direct Travel & Tourism Jobs



Direct Travel & Tourism Jobs by Job Type, 2018



Total Travel & Tourism Jobs, 2018



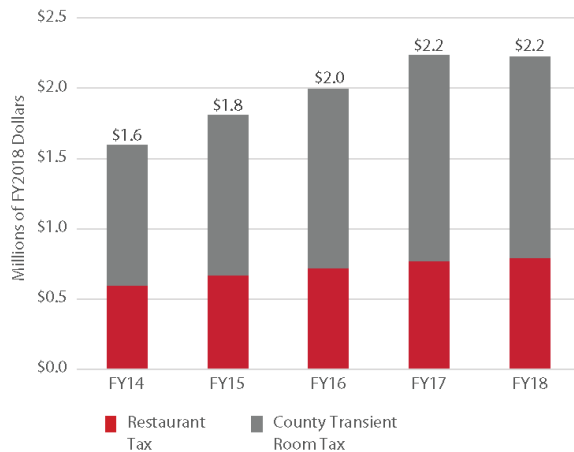
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## Tax Revenue

Visitor spending generated \$14.6 million in direct tax revenue, including \$8.9 million in state and \$5.8 million in local tax revenue.<sup>3</sup> Visitor spending generated approximately \$3.8 million in additional indirect and induced state and local tax revenue, for a total of \$18.5 million.<sup>4</sup>

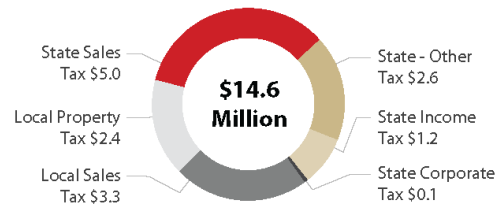
Travel and tourism-related sales tax revenue examples include transient room tax and restaurant tax. In fiscal year 2018, Iron County collected a total of \$2.21 million in these two sales taxes combined, down 1.7% percent from 2017 (\$2.19 million) and up 38.7% over the past five years.<sup>5</sup>

### Select Local Sales Tax Revenues



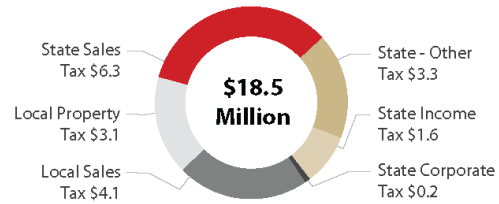
### Direct Travel & Tourism Tax Revenue, 2018

(Based on \$176.4 million in direct spending)

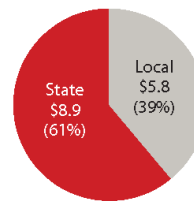


### Total Travel & Tourism Tax Revenue, 2018

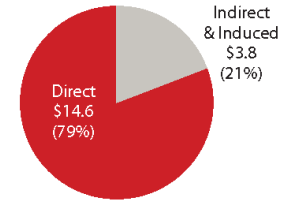
(Based on \$218.6 million in total spending)<sup>6</sup>



### Direct Tax Revenue, 2018



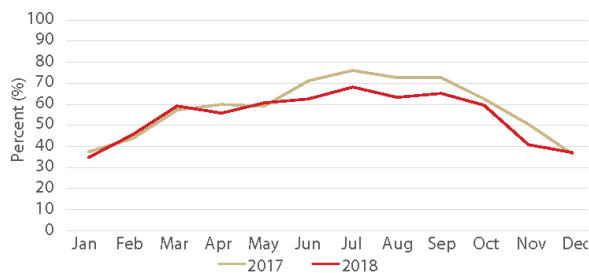
### Total Tax Revenue, 2018



## Hotel Data

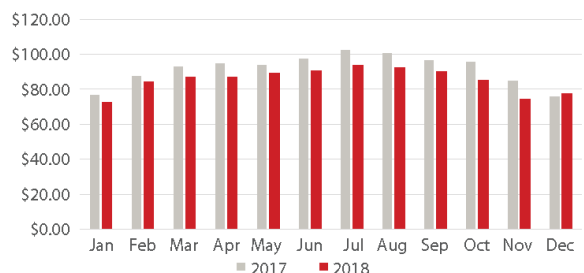
Iron County hotel occupancy rates averaged 54.5% in 2018 compared to 58.5% in 2017. July, September, August, and June (in that order) had the highest average occupancy rates.

### Average Hotel Occupancy Rate



In 2018, Iron County's average daily room rate was \$85.36 compared to \$91.61 in 2017, a 6.8% year-over-year decrease.

### Average Hotel Daily Room Rate



## Endnotes

- 1 This spending figure does not include public transportation spending (i.e. transportation fares and travel reservation costs).
- 2 When Utah visitors purchase from Utah businesses, the businesses hire employees and purchase from other local businesses, who in turn hire employees and purchase from other local businesses. These rounds of activity produce indirect employment effects. Then, direct and indirect employees spend a portion of their wages in the local economy, spurring additional "induced" effects.

- 3 State tax revenue includes sales, personal income, fuel, corporate income and other taxes; local tax revenues include sales, property, and other taxes.
- 4 See note #2 regarding "indirect and induced."
- 5 Adjusted for inflation. Total spending includes direct spending in addition to indirect and induced spending effects (see note #2).
- 6 Total spending includes direct spending plus indirect and induced spending effects (see note #2).

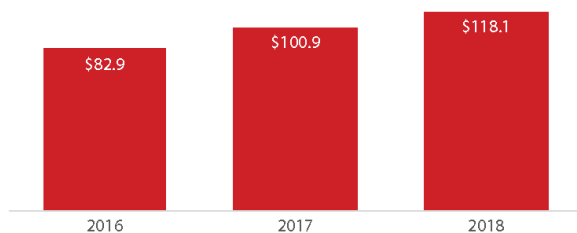
Kem C. Gardner Policy Institute analysis of U.S. Travel Association, U.S. Bureau of Labor Statistics, Utah State Tax Commission, VisaVue®, U.S. Bureau of Economic Analysis, and STR, Inc., data. Republication or other re-use of STR, Inc. data without the express written permission of STR, Inc. is strictly prohibited.

## Kane County, 2018

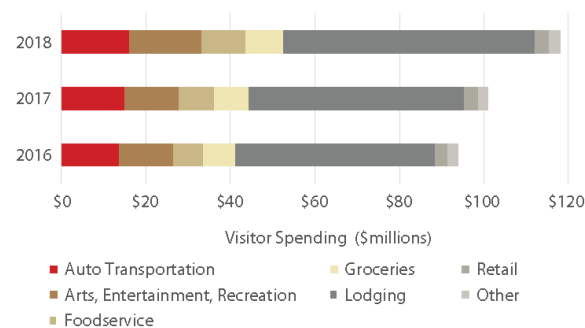
### Spending

In 2018, visitors directly spent an estimated \$118.1 million in Kane County, a 17.0% increase from 2017.<sup>1</sup> The top three spending categories were lodging, recreation, and auto transportation. Kane County visitor spending made up 1.5% of total statewide spending.

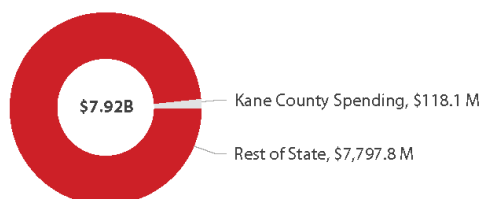
Direct Spending Estimates (millions of dollars)



Direct Spending Estimates by Spending Category



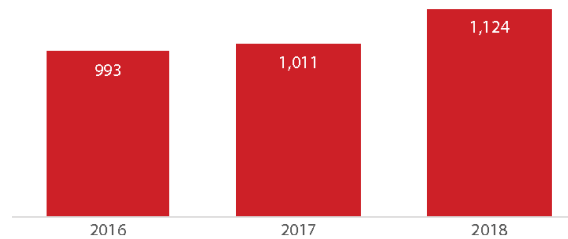
Kane Portion of Statewide Visitor Spending, 2018



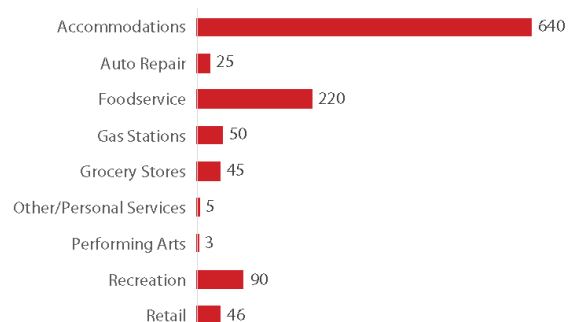
### Jobs

Visitor spending supported 1,124 direct Kane County travel and tourism jobs, an 11.2% increase from 2017. Accommodations, foodservice, and recreation were the top three job sectors. These 1,124 direct travel and tourism jobs supported an additional 246 indirect and induced jobs in the county for a total of 1,370 jobs.<sup>2</sup>

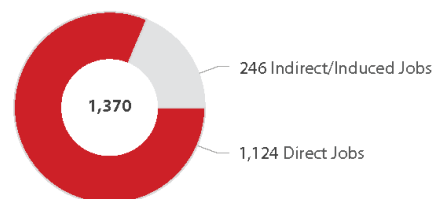
Direct Travel & Tourism Jobs



Direct Travel & Tourism Jobs by Job Type, 2018



Total Travel & Tourism Jobs, 2018



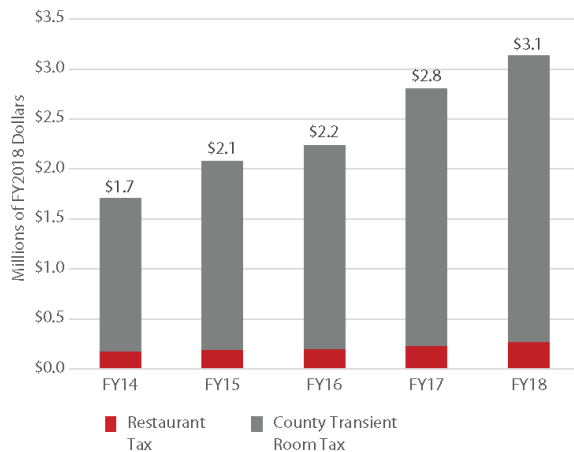
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## Tax Revenue

Visitor spending generated \$17.8 million in direct tax revenue, including \$8.4 million in state and \$9.4 million in local tax revenue.<sup>3</sup> Visitor spending generated approximately \$3.8 million in additional indirect and induced state and local tax revenue, for a total of \$21.6 million.<sup>4</sup>

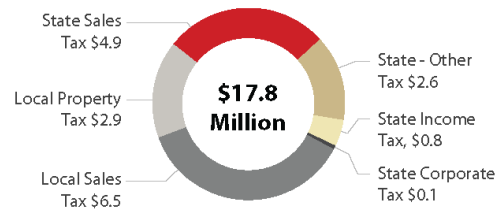
Travel and tourism-related sales tax revenue examples include transient room tax and restaurant tax. In fiscal year 2018, Kane County collected a total of \$3.1 million in these two sales taxes combined, up 11.6% percent from 2017 and 83.1% over the past five years.<sup>5</sup>

### Select Local Sales Tax Revenues



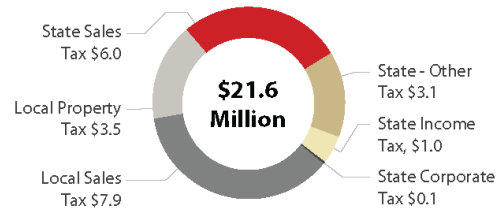
### Direct Travel & Tourism Tax Revenue, 2018

(Based on \$118.1 million in direct spending)

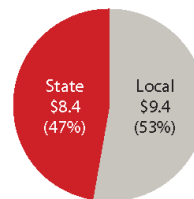


### Total Travel & Tourism Tax Revenue, 2018

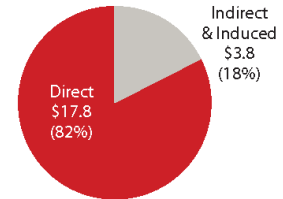
(Based on \$149.6 million in total spending)<sup>6</sup>



### Direct Tax Revenue, 2018



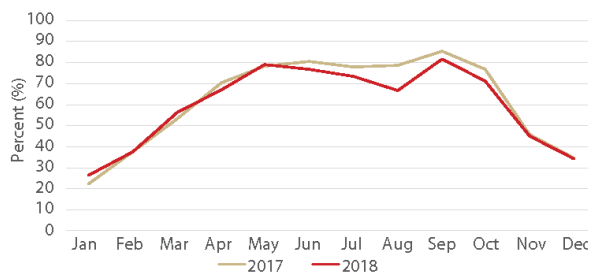
### Total Tax Revenue, 2018



## Hotel Data

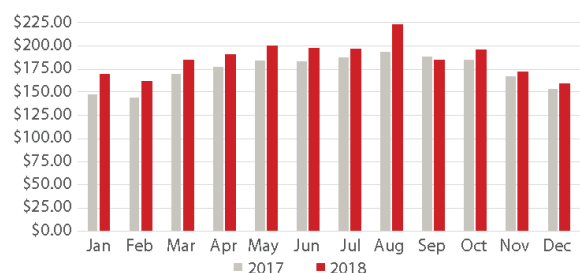
Kane County hotel occupancy rates averaged 59.7% in 2018 compared to 61.9% in 2017. September, May, June, and July (in that order) had the highest average occupancy rates.

### Average Hotel Occupancy Rate



In 2018, Kane County's average daily room rate was \$186.12 compared to \$172.91 in 2017, a 7.6% year-over-year increase.

### Average Hotel Daily Room Rate



## Endnotes

- 1 This spending figure does not include public transportation spending (i.e. transportation fares and travel reservation costs).
- 2 When Utah visitors purchase from Utah businesses, the businesses hire employees and purchase from other local businesses, who in turn hire employees and purchase from other local businesses. These rounds of activity produce indirect employment effects. Then, direct and indirect employees spend a portion of their wages in the local economy, spurring additional "induced" effects.

- 3 State tax revenue includes sales, personal income, fuel, corporate income and other taxes; local tax revenues include sales, property, and other taxes.
- 4 See note #2 regarding "indirect and induced."
- 5 Adjusted for inflation. Total spending includes direct spending in addition to indirect and induced spending effects (see note #2).
- 6 Total spending includes direct spending plus indirect and induced spending effects (see note #2).

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## Washington County, 2018

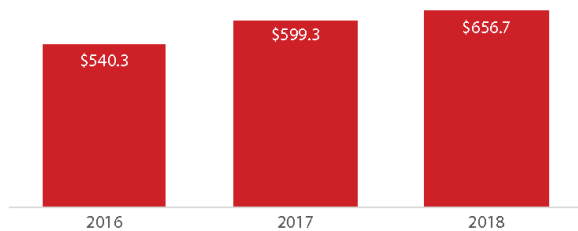
### Spending

In 2018, visitors directly spent an estimated \$656.7 million in Washington County, a 9.6% increase from 2017.<sup>1</sup> The top three spending categories were lodging, auto transportation, and foodservice. Washington County visitor spending made up 8.3% of total statewide spending.

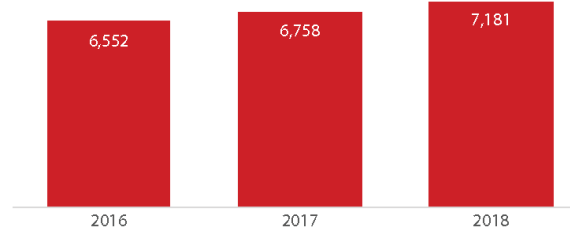
### Jobs

Visitor spending supported 7,181 direct Washington County travel and tourism jobs, a 6.3% increase from 2017. Foodservice, accommodations, and retail were the top three job sectors. These 7,181 direct travel and tourism jobs supported an additional 2,258 indirect and induced county jobs for a total of 9,439 jobs.<sup>2</sup>

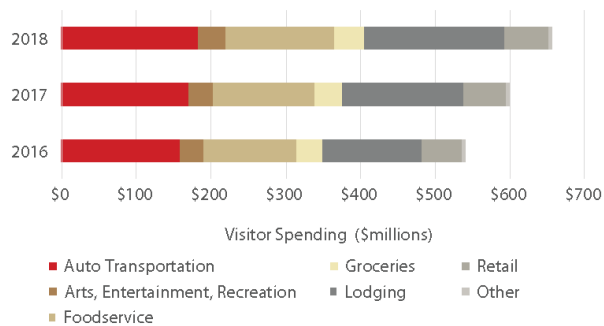
Direct Spending Estimates (millions of dollars)



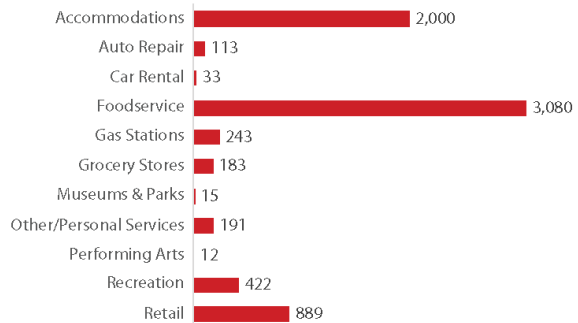
Direct Travel & Tourism Jobs



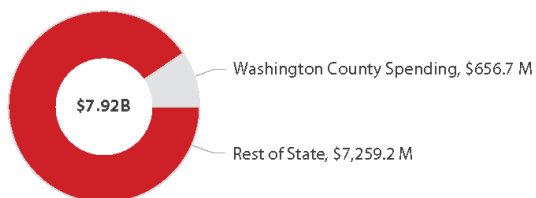
Direct Spending Estimates by Spending Category



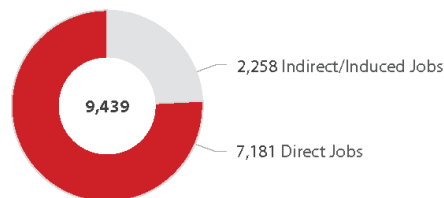
Direct Travel & Tourism Jobs by Job Type, 2018



Washington Portion of Statewide Visitor Spending, 2018



Total Travel & Tourism Jobs, 2018



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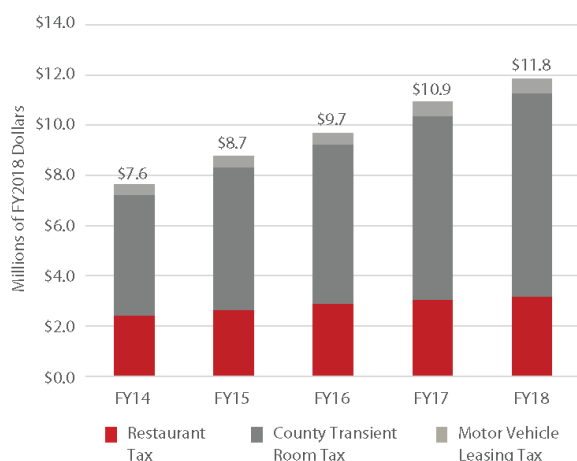


## Tax Revenue

Visitor spending generated \$72.6 million in direct tax revenue, including \$43.7 million in state and \$28.9 million in local tax revenue.<sup>3</sup> Visitor spending generated approximately \$25.6 million in additional indirect and induced state and local tax revenue, for a total of \$98.2 million.<sup>4</sup>

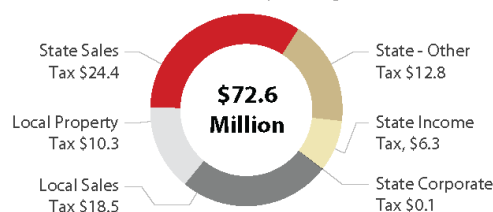
Travel and tourism-related sales tax revenue examples include transient room tax, motor vehicle leasing tax, and restaurant tax. In fiscal year 2018, Washington County collected a total of \$11.8 million from these three sales taxes, up 8.5% from 2017 and 55.0% over the past five years.<sup>5</sup>

### Select Local Sales Tax Revenues



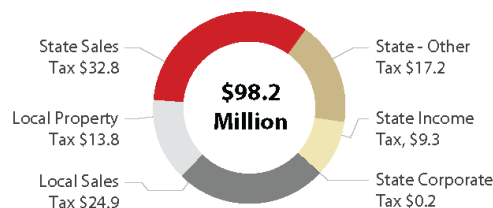
### Direct Travel & Tourism Tax Revenue, 2018

(Based on \$656.7 million in direct spending)

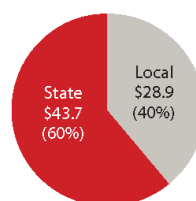


### Total Travel & Tourism Tax Revenue, 2018

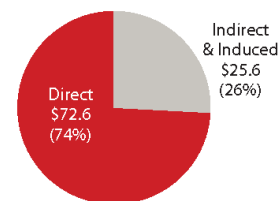
(Based on \$944.5 million in total spending)<sup>6</sup>



### Direct Tax Revenue, 2018



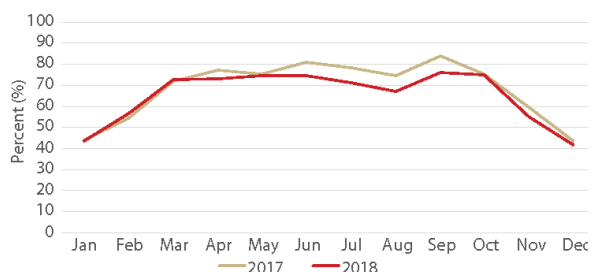
### Total Tax Revenue, 2018



## Hotel Data

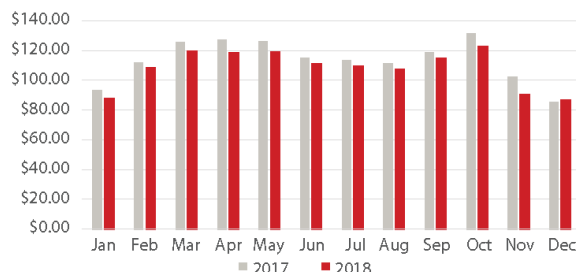
Washington County hotel occupancy rates averaged 65.2% in 2018 compared to 68.3% in 2017. September, October, June, and May (in that order) had the highest average occupancy rates.

### Average Hotel Occupancy Rate



In 2018, Summit County's average daily room rate was \$108.33 compared to \$113.56 in 2017, a 4.6% year-over-year decrease.

### Average Hotel Daily Room Rate



## Endnotes

- 1 This spending figure does not include public transportation spending (i.e. transportation fares and travel reservation costs).
- 2 When Utah visitors purchase from Utah businesses, the businesses hire employees and purchase from other local businesses, who in turn hire employees and purchase from other local businesses. These rounds of activity produce indirect employment effects. Then, direct and indirect employees spend a portion of their wages in the local economy, spurring additional "induced" effects.

- 3 State tax revenue includes sales, personal income, fuel, corporate income and other taxes; local tax revenues include sales, property, and other taxes.
- 4 See note #2 regarding "indirect and induced."
- 5 Adjusted for inflation. Total spending includes direct spending in addition to indirect and induced spending effects (see note #2).
- 6 Total spending includes direct spending plus indirect and induced spending effects (see note #2).

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## **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 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 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 Housing
8. Recreational Opportunities	8. Venture Capital

### 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 affordable 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 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 such organizations.

Local Economic Development Professionals have been employed by Beaver, Garfield, Iron, Kane, 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 worked with the Zion Regional Collaborative on the National Scenic Byway 9 and provided a letter of recommendation for the project to move forward.

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 Housing and 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, state Enterprise Zones, and Opportunity Zones.

Utah Small Business Development Centers (SBDC) have offices located at Southern Utah University in Cedar City and Dixie Technical College 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.

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

Governor's 2019 Economic Development Strategy Plan:

Five County Association of Governments partners with and meets quarterly with economic development agencies throughout the state. The following is the executive summary from the Governor's 2019 Economic Development Strategy Plan. The following link is the full Plan.  
<file:///C:/Users/nwiberg/Downloads/utah-goed-2019-strategic-plan.pdf>

"Vision Building on its success, Utah will elevate the lives of current and future generations through an exceptional quality of life, provide economic opportunity and upward mobility, and encourage business growth and innovation. Utah is home to attractive, healthy urban and rural communities where residents and businesses thrive, and visitors feel welcome.

### **Guiding Principles**

- Foster a business-friendly environment with reasonable taxes and regulations
- Be flexible to adapt to changing economic needs
- Advance a diverse, resilient economy that provides opportunity for all residents
- Help develop viable, sustainable industries for the future
- Emphasize the need for a qualified, homegrown workforce for the jobs of today and tomorrow
- Maximize Utah's global presence as a hub for economic growth and opportunity
- Consider and acknowledge the importance of Utahns' quality of life, environment and natural resources, short commute times, and affordable housing
- Structure and use incentives and other programs so the public investment has a clear connection to state economic development priorities
- Plan and build physical and digital infrastructure to accommodate growth and maintain quality of life in the state's urban and rural areas
- Value evidence and data in providing direction for economic strategies
- Collaborate and cooperate across state and local government and partner organizations

### **Economic Development Policy Pillars**

1. Strategic Industry Advancement — Invest in industries that create a public benefit through human and physical capital improvements in urban and rural Utah.
2. Innovation and Entrepreneurship — Support the creation and growth of high impact, future-forward Utah businesses and products for the global market.
3. Talent Development — Align industry and education to continue producing a highly-skilled, world-class workforce.
4. Uniquely Utah — Capitalize on Utah's natural environment, outdoor recreation and sports,

and unique heritage and arts to attract workers and build the state's tourism and film economies.

### **Collaboration and Partnership**

The plan seeks to encourage communication, cooperation and coordination between state and local governments and organizations in the private sector. Our approach is to pursue economic development in Utah as a team sport, beginning with improvements in communication and collaboration across state agencies and among state and local partner organizations. The plan identifies roles for many state agencies supporting the state's economic development efforts, highlighting GOED's role as the captain for "Team Utah." It also calls out important roles for other agencies to promote key industries, manage the needed infrastructure, and ensure Utah has the talent to compete successfully in a global economy.

The plan addresses several cross-cutting issues related to the state's mix of incentive programs, its efforts to address the unique challenges facing rural Utah, and a coherent approach to coordinating economic development efforts across multiple state agencies. Also, the plan sets out principles and strategies to increase cooperation among state and local economic development partners and offers recommendations for how to set performance metrics that engage stakeholders.

### **Conclusion**

Through this plan, Utah seeks to create new opportunities for communities, businesses, residents, and visitors to enjoy the bounties of a healthy economy. At the heart of its efforts, Utah agencies — state, local, nonprofit and private sector — can use this plan as a roadmap for working together to elevate Utah and its people." (Utah GOED Economic Development Strategy Plan)

### ***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.

The first settlers in Beaver County came from Parowan in April 1856. They built log cabins along the 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 long 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 is 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

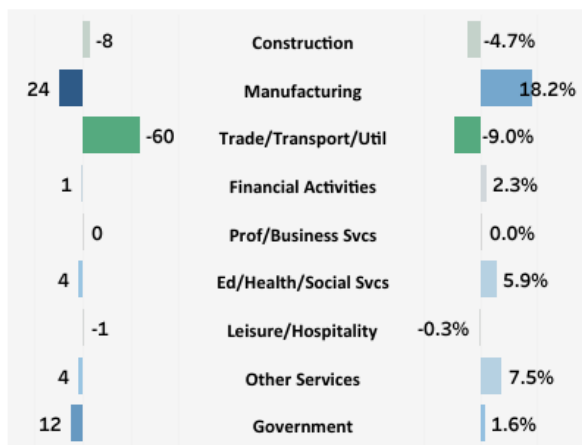
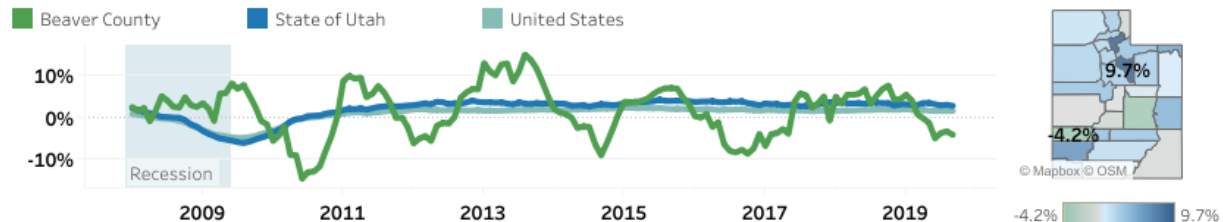
## Beaver County

Select Area  
Beaver County

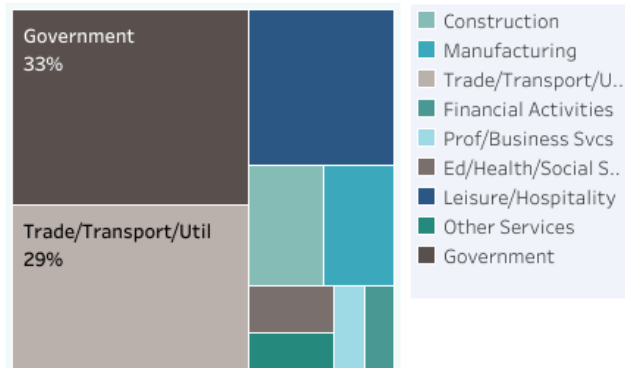
Updated 1/29/2020

### Year-to-Year Change in Nonfarm Jobs SEPTEMBER 2019\*

↓ -103



### Employment Share 12 Months ending SEPTEMBER 2019



## How's the economy?

Continuing the pattern set earlier in the year, Beaver County lost jobs during the third quarter of 2019. The current loss appears to be just one more ride on the county's employment roller. This time, job loss remained concentrated in just a few industries. Although employment totals are down, the county followed the state's lead with persistently declining joblessness. Construction permitting is up, which should boost employment in the months ahead. In addition, sales rebounded nicely in third quarter. Although employment is the only indicator showing signs of distress, it is an important indicator and suggests the Beaver County economy is less than robust.

## Jobs

Between September 2018 and September 2019, Beaver County's total nonfarm employment dropped by more than 100 positions, a decrease of more than a 4 percent.

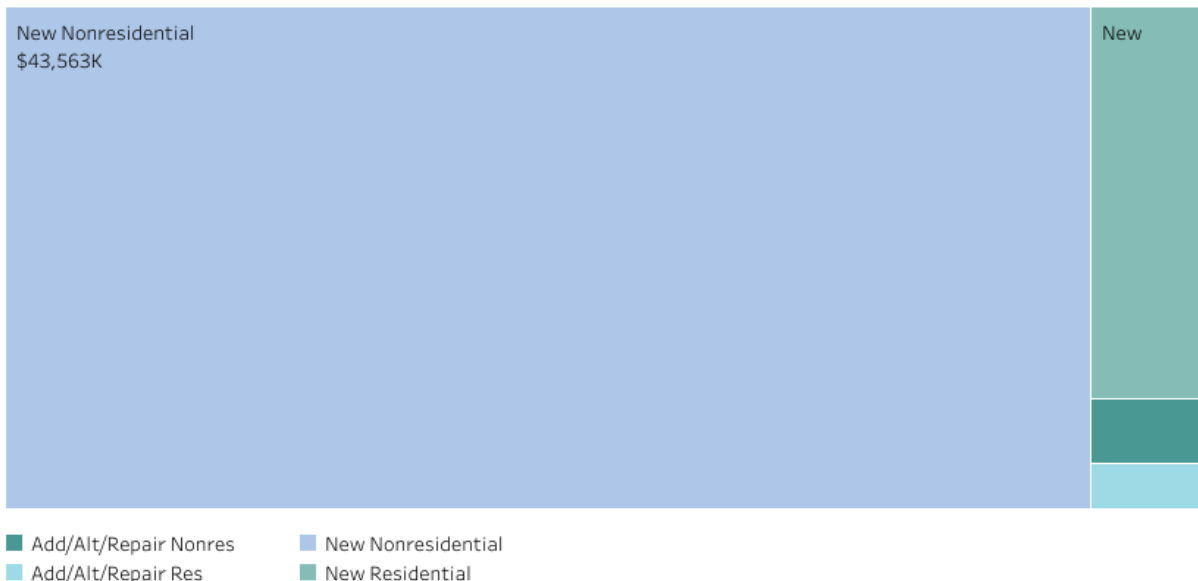
Mining, transportation/warehousing and retail trade industries bore the primary responsibility for the overall decline.

On the positive side, job gains in manufacturing and the public sector partially offset declines elsewhere.

\* Preliminary. Source: U.S. Bureau of Labor Statistics; Utah Department of Workforce Services.

## Construction Permitting NOVEMBER 2019 Year-to-Date

NOVEMBER 2019 Year-to-Date



## Year-to-Year Change in Gross Taxable Sales

THIRD QUARTER 2019\*



## Construction & Sales

Home permitting appeared to surge in the latter half of 2019. Through November 2019, the number of permitting units was up 92 percent over the same time period in 2018.

Even though 2018 showed extremely vigorous nonresidential permitting, approved values in this category have increased by 166 percent in the first 11 months of the year. Permits for nonbuilding structures and utilities accounted for much of the expansion.

Between the third quarters of 2018 and 2019, Beaver County sales improved by more than 13 percent, a pleasant change from the declining sales of the previous quarter.

Part of the gain occurred because of a previous-period adjustment and sales in the "occasional" category. However, both manufacturing business expenditures and sales at gasoline stations showed dramatic gains.

\*Preliminary: NA - Not Available Source: Utah Dept of Workforce Svcs; Kem C. Gardner Policy Institut; Utah State Tax Commission.



## **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

Select Area  
Garfield County

Updated 1/29/2020

### Year-to-Year Change in Nonfarm Jobs SEPTEMBER 2019\*

↑ 53

↑ 1.9%

Garfield County

↑ 2.7%

State of Utah

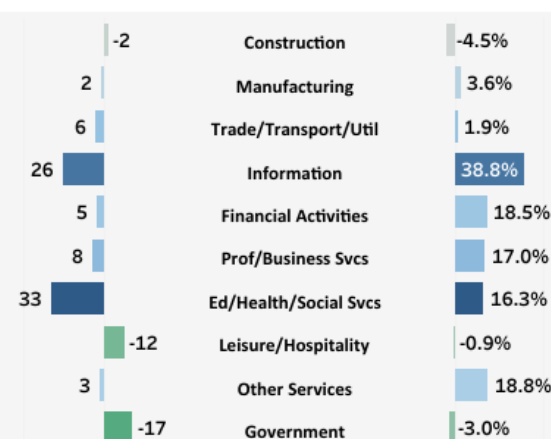
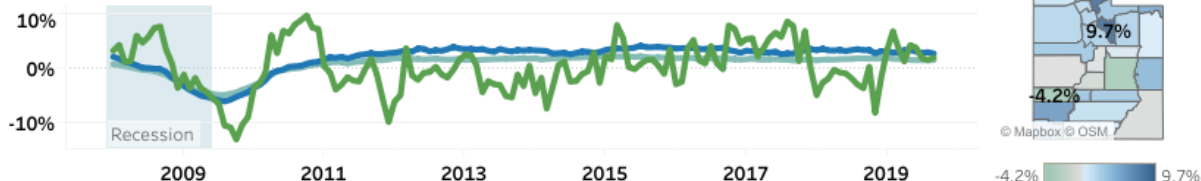
↑ 1.5%

United States

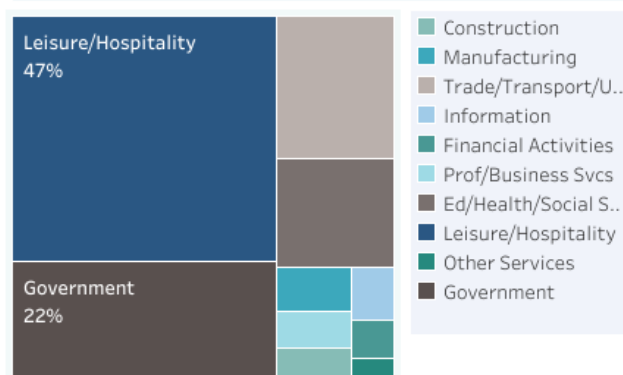
Garfield County

State of Utah

United States



### Employment Share 12 Months ending SEPTEMBER 2019..



## How's the economy?

Garfield County sustained its previous job growth as the year progressed. However, the rate of expansion slackened somewhat compared to earlier in the year. Unusually, the leisure/hospitality industry contracted slightly. As elsewhere in Utah, unemployment continued to drop to levels not seen since before the Great Recession and initial claims showed no sign of cyclical difficulties. Sales also improved nicely in third quarter. In general, the county's economy remained fit.

## Jobs

Garfield County added more than 50 new jobs between September 2018 and September 2019 for a growth rate of roughly 2 percent.

The strongest employment additions occurred in private education/healthcare/social services and information.

Typically a consistent source of new jobs, the leisure and hospitality sector actually took an employment hit this quarter. In addition, the public sector lost jobs.

\* Preliminary. Source: U.S. Bureau of Labor Statistics; Utah Department of Workforce Services.

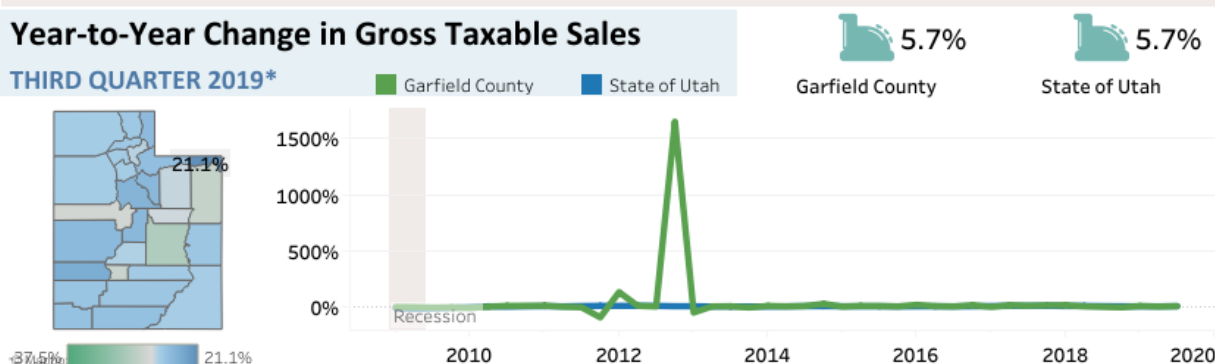
## Construction Permitting **NOVEMBER 2019 Year-to-Date**

NOVEMBER 2019 Year-to-Date



## Year-to-Year Change in Gross Taxable Sales

THIRD QUARTER 2019\*



## Construction & Sales

More realistic figures are now available for Garfield County's home permits. However, the lack of nonresidential values is questionable. Without solid numbers for 2018, year-over comparisons provide little insight.



Gross taxable sales continued to improve in the third quarter of 2019 with a year-over increase of nearly 6 percent.



In particular, gains in retail trade proved healthy.



\*Preliminary: NA - Not Available Source: Utah Dept of Workforce Svcs; Kem C. Gardner Policy Institut; Utah State Tax Commission.

## **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

Select Area  
Iron County

Updated 1/29/2020

### Year-to-Year Change in Nonfarm Jobs SEPTEMBER 2019\*

↑ 1,282

↑ 6.5%

Iron County

↑ 2.7%

State of Utah

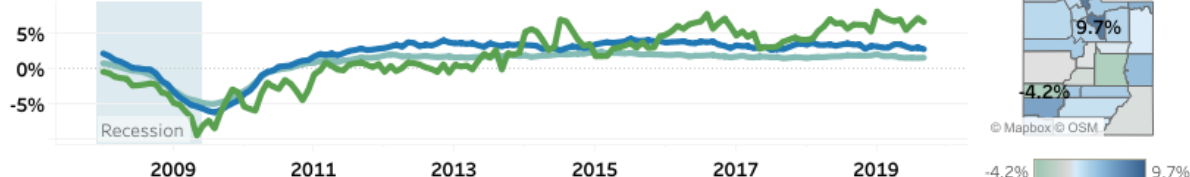
↑ 1.5%

United States

Iron County

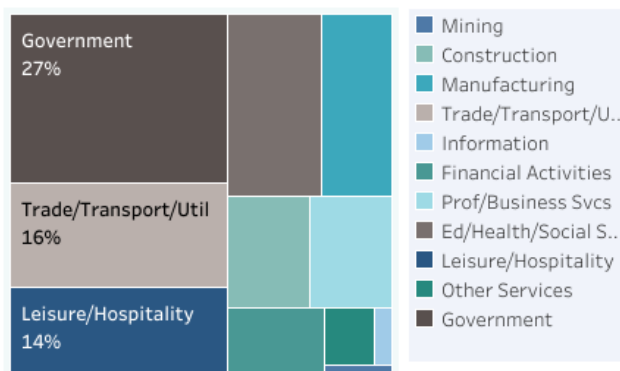
State of Utah

United States



299	-38	Mining	-32.2%
68		Construction	23.3%
116		Manufacturing	3.7%
	-18	Trade/Transport/Util	3.6%
45		Information	-11.9%
135		Financial Activities	4.7%
123		Prof/Business Svcs	10.2%
237		Ed/Health/Social Svcs	5.1%
17		Leisure/Hospitality	9.2%
298		Other Services	4.3%
		Government	5.4%

### Employment Share 12 Months ending SEPTEMBER 2019..



## How's the economy?

Once again, Iron County created jobs at a rapid rate in the third quarter of 2019. Currently, expansion seems a little "hot." With such strong employment gains and shrinking joblessness, the county's labor market has become extremely tight forcing employers to pay higher wages in order to hire workers. There are no unseasonal increases in unemployment insurance claims, another signal that few workers are available for hire. Home building does appear to be slowing. However, strong permitting in the nonresidential sector practically offset losses in the residential segment. Finally, sales continue to show robust gains. All in all, the county remains economically vigorous with a ti..

## Jobs

Iron County touted one of the fastest growing labor markets in Utah with year-over job growth of 6.5 percent in September 2019.

The addition of nearly 1,300 new jobs can be traced chiefly to expansion in construction, the public sector and leisure/hospitality services. However, professional/business services and private education/healthcare/social services contributed employment in t..

A few minor job-loss chinks did appear in the county's otherwise shiny amour. Mining, information and covered agriculture (not included in the totals) each experienced minor declines.

\* Preliminary. Source: U.S. Bureau of Labor Statistics; Utah Department of Workforce Services.

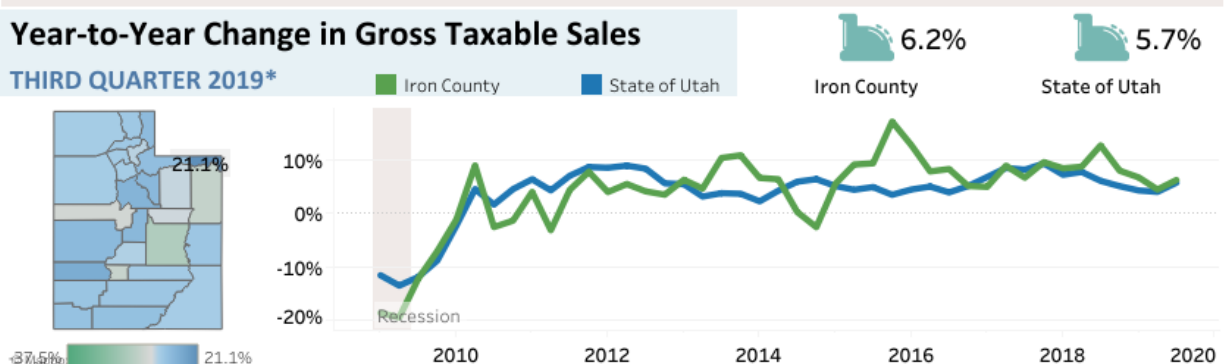
## Construction Permitting NOVEMBER 2019 Year-to-Date

NOVEMBER 2019 Year-to-Date



## Year-to-Year Change in Gross Taxable Sales

THIRD QUARTER 2019\*



## Construction & Sales

During the first 11 months of 2019, home permitting dropped about 26 percent when compared with the same time period in the previous year. 🛠️

The slowdown in residential activity overshadowed a strong 300-percent-plus gain in residential permit values. New industrial permitting is also up. 🛠️

Overall, permit values are down just 7 percent in November 2019, year-to-date, compared with the same time period in 2018. 🛠️

Gross taxable sales gains remained healthy, growing more than 6 percent between the third quarters of 2018 and 2019. 📊

Sales in retail trade contributed greatly to the overall gain with general merchandise stores (such as WalMart) and gasoline stations experiencing growth. 📊

\*Preliminary: NA - Not Available Source: Utah Dept of Workforce Svcs; Kem C. Gardner Policy Institut; Utah State Tax Commission.

## **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

Select Area  
Kane County

Updated 1/29/2020

### Year-to-Year Change in Nonfarm Jobs SEPTEMBER 2019\*

↑ 34

↑ 0.9%

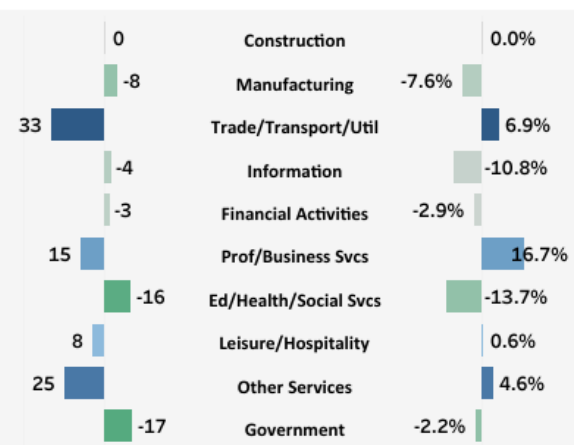
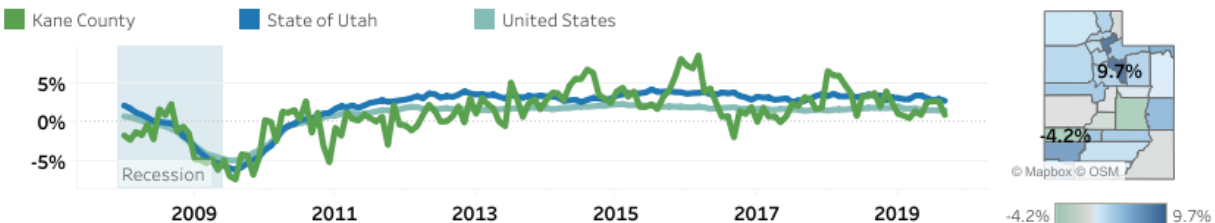
Kane County

↑ 2.7%

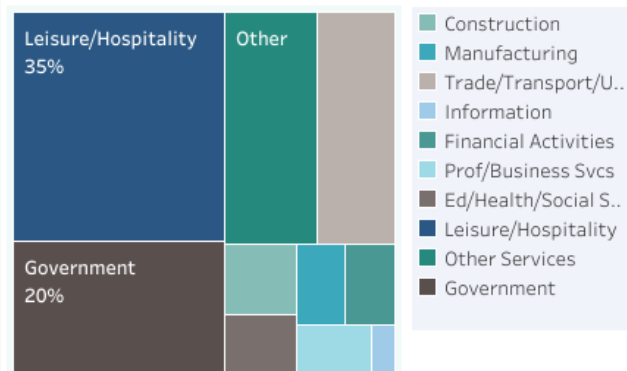
State of Utah

↑ 1.5%

United States



### Employment Share 12 Months ending SEPTEMBER 2019



## How's the economy?

While Kane County job growth slowed somewhat as third quarter 2019 came to a close, sustained expansion can only be seen as an economic plus. Despite losses in several industries, overall, employment totals continued to improve. Moreover, the area's very low unemployment rate suggests there are relatively few jobless applicants to be found. Construction permitting is down slightly, but sales continued to show healthy increases. While not every economic indicator is firing on all cylinders, Kane County's economy remains in the black.

## Jobs

Kane's County's year-to-year job growth rate dropped to 1 percent in September 2019 representing a gain of just 34 jobs. However, the September figure was the slowest job growth of the quarter and may represent an anomaly.

Retail trade generated the largest number of new jobs with help other services (which includes Best Friends Animal Sanctuary) and professional/business services.

On the other hand, healthcare/social services, government and manufacturing all lost jobs between September 2018 and September 2019.

\* Preliminary. Source: U.S. Bureau of Labor Statistics; Utah Department of Workforce Services.



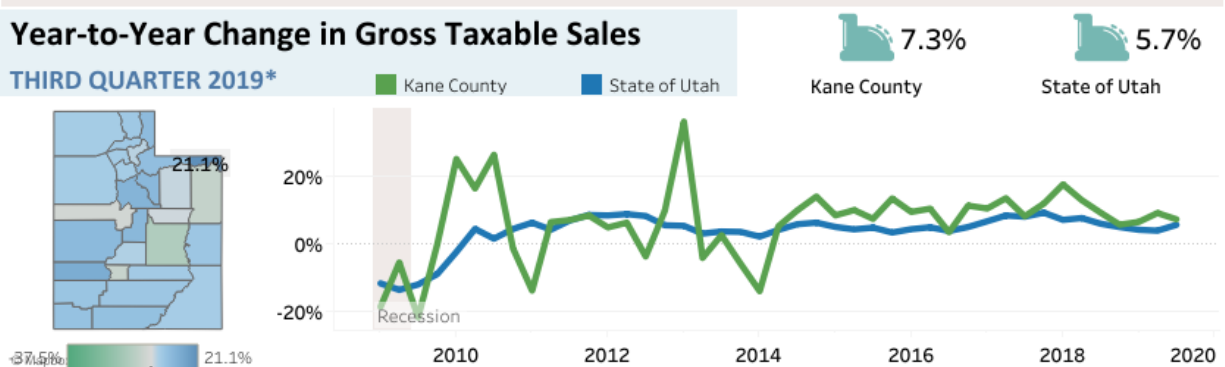
## Construction Permitting NOVEMBER 2019 Year-to-Date

NOVEMBER 2019 Year-to-Date



## Year-to-Year Change in Gross Taxable Sales

THIRD QUARTER 2019\*



## Construction & Sales

Reported new home permit approvals for the first 11 months of 2019 are down 9 percent compared to the time period in 2018

Nonresidential authorized values have ticked up in recent months to produce a 19-percent gain. Permits for hotel/motel construction were a..

Overall, permit values are down about 26 percent suggesting slower construction employment expansion in the months ahead.

Gross taxable sales showed persistent improvement with a robust 7-percent gain between the third quarters of 2018 and 2019.

A serious gain in accommodations accounted for much of the increase. Retail trade sales improved nicely as well.

\*Preliminary: NA - Not Available Source: Utah Dept of Workforce Svcs; Kem C. Gardner Policy Institut; Utah State Tax Commission.

## **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

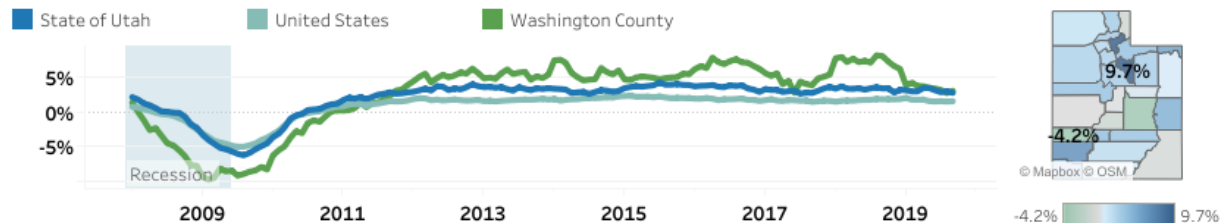
Select Area  
Washington County

Updated 1/29/2020

### Year-to-Year Change in Nonfarm Jobs SEPTEMBER 2019\*

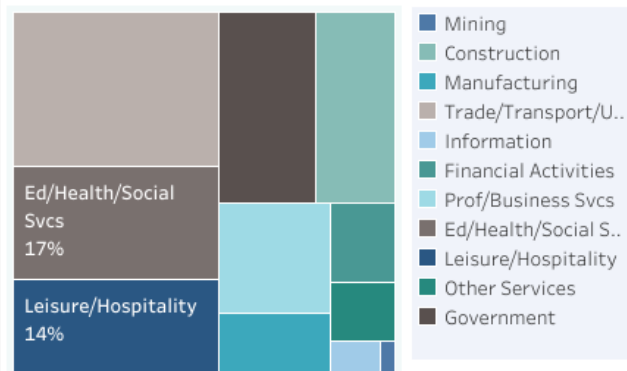
↑ 2,076

Washington County 3.0% State of Utah 2.7% United States 1.5%



-39	Mining	-14.7%
313	Construction	4.1%
101	Manufacturing	3.0%
473	Trade/Transport/Util	3.0%
-69	Information	-8.0%
167	Financial Activities	6.5%
-460	Prof/Business Svcs	-7.4%
768	Ed/Health/Social Svcs	6.6%
174	Leisure/Hospitality	1.7%
265	Other Services	14.3%
383	Government	4.0%

### Employment Share 12 Months ending SEPTEMBER 2019..



## How's the economy?

Third quarter 2019 marked the third straight quarter of notably slower job growth in Washington County. While the rate of growth is still impressive, it measures about half that of 2018. Current rates of employment expansion rank amongst the lowest of the current business cycle expansion. Most industries are growing at a more leisurely pace than last year. Gross taxable sales also continued to show lower-than-average gains. In addition, wage growth has slowed. Home permitting has improved somewhat in recent months, although the gains are centered in multi-family buildings rather than single family homes. Joblessness remains incredibly low still defining a tight labor market. In ..

## Jobs

Job growth in Washington County ranked among the lowest of the current expansion. Between September 2018 and September 2019, job growth was 3.0%.

The county's largest employment gains can be traced to healthcare/social services. Industries with second-tier job growth include..

A business-classification correction disguises what is really no growth in retail trade employment.

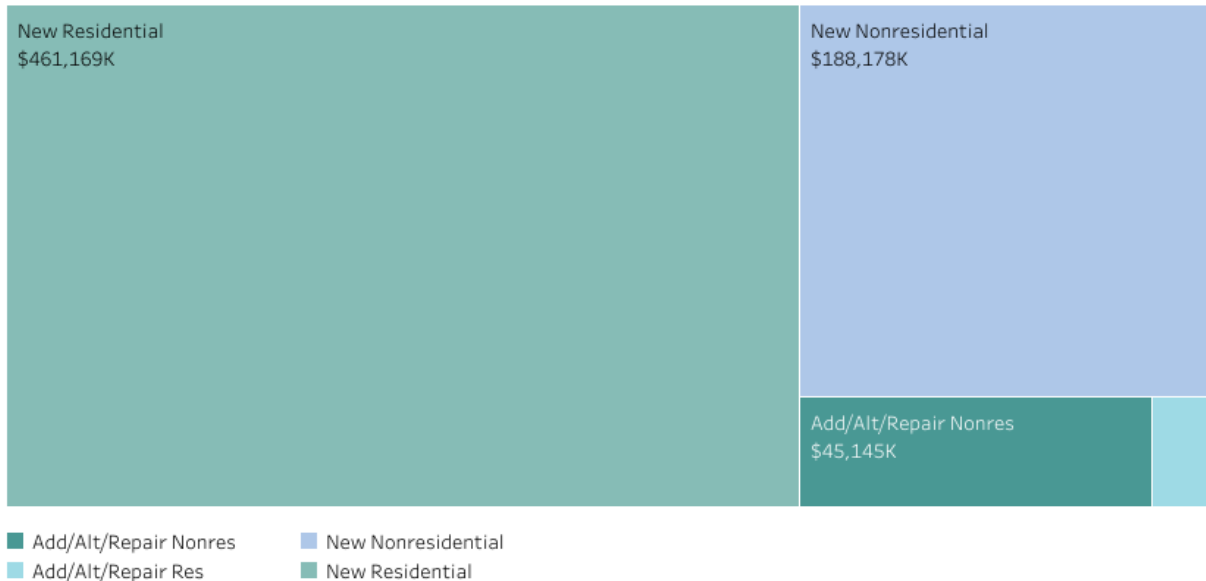
Professional/business services jobs took a slight hit. This industry can be a bellwether of activity in other industries.

Most industries are showing slower growth rather than actual job loss.

\* Preliminary. Source: U.S. Bureau of Labor Statistics; Utah Department of Workforce Services.

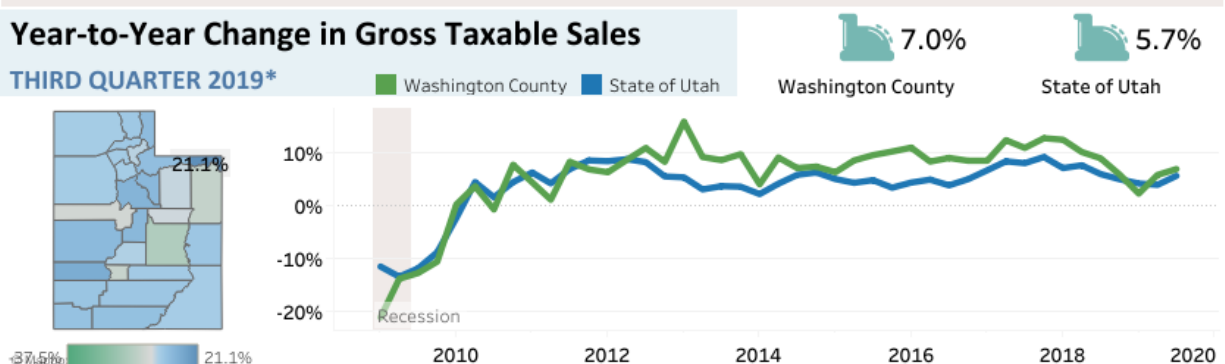
## Construction Permitting NOVEMBER 2019 Year-to-Date

NOVEMBER 2019 Year-to-Date



## Year-to-Year Change in Gross Taxable Sales

THIRD QUARTER 2019\*



## Construction & Sales

The number of new home permits issued appeared to have peaked in 2017. After a slowdown in 2018, the number of units approved has jumped up in recent months. The increase in units is only for multi-family residences. Permits for single family homes are down compared to ..

Nonresidential values are down despite a very large institutional permit.

Gross taxable sales gains slipped drastically as the year began. Although the third quarter 2019 year-to-year rate of expansion ticked up slightly, much of the gain occurred in the occasional/nonclassifiable category and growth rates remain lower than average.

Business investment expenditures are down dramatically as are sales at building materials/garden stores. On the other hand, general merchandise stores and food services (restaurants, etc.) experienced vigorous gains.

\*Preliminary: NA - Not Available Source: Utah Dept of Workforce Svcs; Kem C. Gardner Policy Institut; Utah State Tax Commission.

# 2020 Economic Report to the Governor

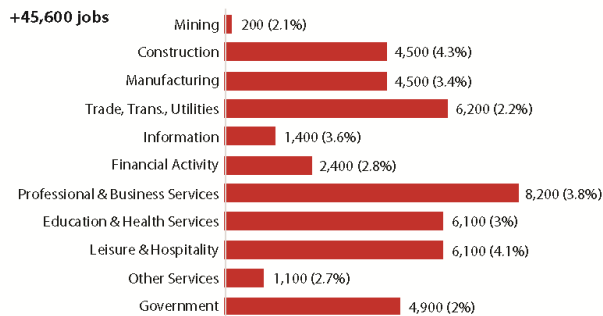
The Utah economy continues to prosper. Like the nation, the state's decade-long economic expansion became the longest on record in 2019. Every major industrial sector expanded over the last year, adding 45,600 new jobs to the economy. The annual employment growth rate of 3.0 percent in 2019 was at the state's long-term average and among the strongest in the nation.

Fueled by record-level residential and near-record commercial activity, Utah's construction sector added 4,500 jobs and posted the state's fastest pace of job growth in 2019, 4.3 percent. The boom in the multifamily sector, primarily apartment construction,

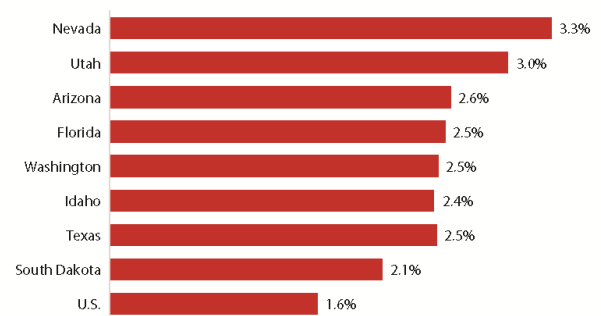
drove a 10.9 percent increase in the value of all permit-authorized residential construction to \$5.7 billion. The value of permit-authorized nonresidential construction grew 6.2 percent in 2019 to \$2.3 billion, the highest posting since 2016's \$2.7 billion.

Low unemployment and rising wages for Utahns, along with an increase in travel and tourism activity, supported strong job growth of 4.1 percent in the state's leisure and hospitality sector over the past year. Above-average snowfall and an extended 2018-2019 ski season led to a record \$1.4 billion in skier spending. With increased marketing emphasis on places to visit in addition to the Mighty 5®

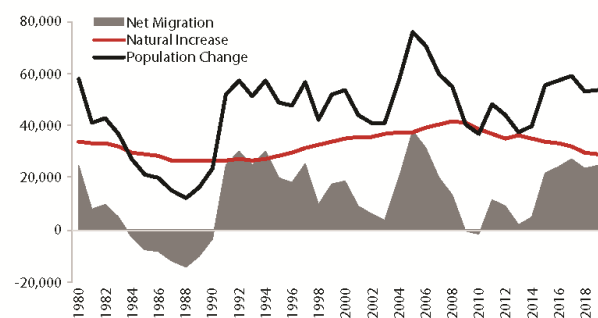
## Utah Employment Growth, Level and Percent, 2018–2019



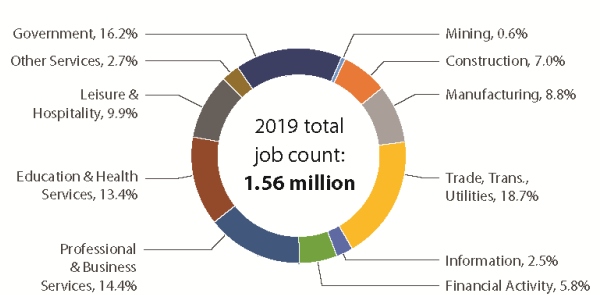
## States with Strongest Job Growth, 2018–2019



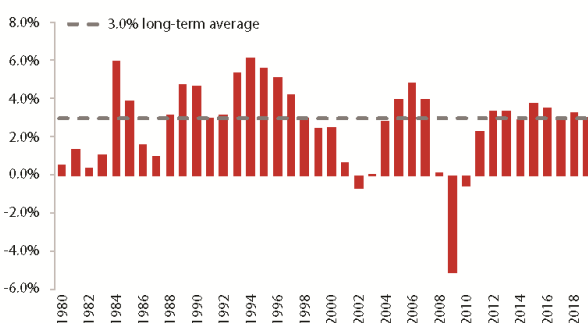
## Utah Components of Population Change



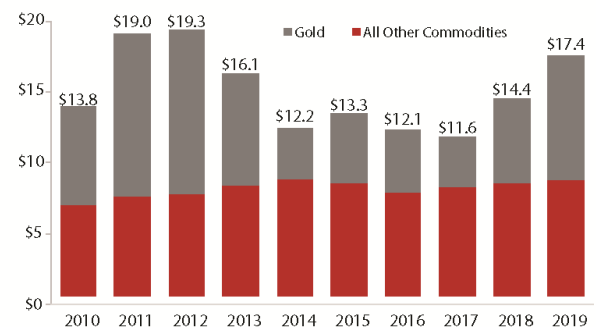
## Total Share of Utah Jobs by Sector, 2019



## Utah Annual Job Growth History



## Utah International Exports, \$ billions



## 2019: Ten years of economic expansion 2020: Uncertainty and moderation, but still healthy growth

national parks, Utah's state parks hosted a record number of visitors in 2019.

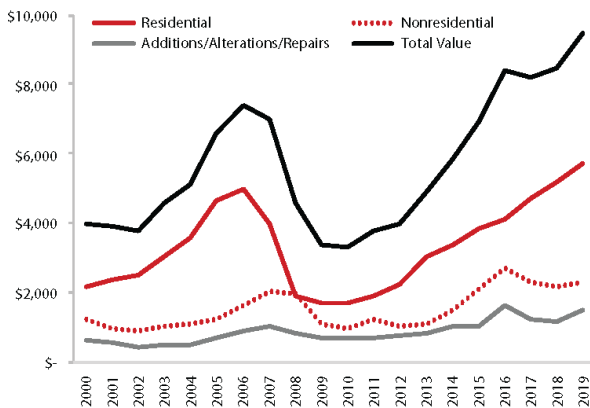
Utah's population grew by 53,600 to reach 3.2 million in 2019. About 47 percent of this growth came from net in-migration as people moved to the state to take advantage of economic opportunity. Natural increase continued to generate the majority of growth, 53 percent, despite births dropping to the lowest level since 2000.

The consensus forecast predicts increasing uncertainty and moderation, but still healthy growth for the Utah economy.

Internal risks in 2020 and beyond include a tight labor market, increasing costs, housing affordability, declining fertility rates, and air quality. Externally, a late U.S. business cycle, trade tensions, and geopolitical instability add risk to the forecast.

State tax cuts and infrastructure spending present an upside risk for the 2020 Utah economy. Favorable demographics, a supportive business climate, and economic diversity will continue to advantage the economy. As long as major risks to the national expansion are not realized, Utah's economy will once again be one of the top performing economies in the nation in 2020.

### Utah Value of New Construction, \$ millions



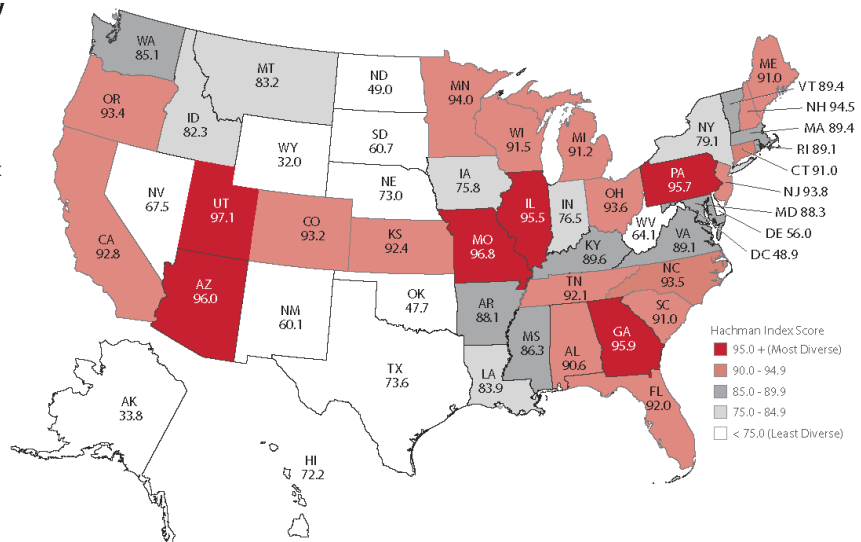
### Utah National Park and Skier Visits, millions



\*2019 skier days will be released in June 2020. Skier days include season that begins with year shown (e.g. 2018 = 2018-2019 ski season).

### Hachman Index of Economic Diversity

According to the Hachman Index, a measure of economic diversity, Utah and Missouri led the nation in economic diversity in 2018 with scores of 97.1 and 96.8, respectively, based on gross domestic product by industry. A higher score, closer to 100, indicates more economic diversity. A timely example of the advantage of diversity is the impact of globalization and tariffs on state economies. Those states with employment concentrations in auto, textiles, or steel production experienced severe job losses. In contrast, Utah's economic diversity provided added protection from the negative impacts of tariffs.



Note: All 2019 data is estimated.

Sources: Kem C. Gardner Policy Institute; U.S. Bureau of Labor Statistics; U.S. Bureau of Economic Analysis; U.S. National Park Service; Ski Utah; Utah Economic Council; U.S. Census Bureau; and Utah Population Committee.

Highlights

## Economic Indicators for Utah and the United States, December 2019

DEMOGRAPHICS	UNITS	2017	2018	2019	2020	PERCENT CHANGE		
		ACTUAL	ACTUAL	ESTIMATE	FORECAST	17-18	18-19	19-20
U.S. July 1st Population	Millions	326	328	330	332	0.6	0.7	0.7
Utah July 1st Population	Thousands	3,114	3,167	3,220	3,274	1.7	1.7	1.7
Utah Net Migration	Thousands	27.0	23.2	23.3	24.8	-14.0	0.3	6.6
Utah Households	Thousands	1,038	1,061	1,086	1,112	2.2	2.4	2.4
<b>EMPLOYMENT AND WAGES</b>								
U.S. Nonfarm Employment (BLS)	Millions	146.6	149.1	151.4	153.2	1.7	1.6	1.2
U.S. Unemployment Rate (BLS)	Percent	4.4	3.9	3.7	3.5			
U.S. Total Nonfarm Wages (BLS)	Billion Dollars	7,968	8,367	8,774	9,137	5.0	4.9	4.1
U.S. Average Annual Pay (BLS)	Dollars	54,348	56,130	57,959	59,662	3.3	3.3	2.9
U.S. Personal Income (BEA)	Billion Dollars	16,879	17,819	18,620	19,301	5.6	4.5	3.7
Utah Nonfarm Employment (DWS)	Thousands	1,469	1,517	1,563	1,605	3.3	3.0	2.7
Utah Unemployment Rate (DWS)	Percent	3.3	3.1	2.7	2.5			
Utah Total Nonfarm Wages (DWS)	Million Dollars	67,174	72,277	77,214	82,867	7.6	6.8	7.3
Utah Average Annual Pay (DWS)	Dollars	45,728	47,630	49,401	51,624	4.2	3.7	4.5
Utah Personal Income (BEA)	Million Dollars	136,544	146,423	155,244	164,559	7.2	6.0	6.0
<b>PRODUCTION AND SALES</b>								
U.S. Real Gross Domestic Product	Billion Chained \$2012	18,108	18,638	19,068	19,462	2.9	2.3	2.1
U.S. Real Exports	Billion Chained \$2012	2,459	2,533	2,524	2,560	3.0	-0.3	1.4
U.S. Retail Sales	Billion Dollars	5,747	6,023	6,242	6,475	4.8	3.6	3.7
Utah Exports (NAICS, Census)	Million Dollars	11,583.0	14,388	16,541	19,773	24.2	15.0	19.5
Utah All Taxable Sales	Million Dollars	61,032	64,983	67,842	71,343	6.5	4.4	5.2
<b>REAL ESTATE AND CONSTRUCTION</b>								
U.S. Private Residential Investment	Billion Dollars	756	787	797	831	4.1	1.4	4.2
U.S. Nonresidential Structures	Billion Dollars	587	633	624	612	7.9	-1.4	-2.0
U.S. Purchase-only Home Price Index	1991 Q1 = 100	245	261	274	285	6.6	5.1	3.8
Utah Dwelling Unit Permits	Thousands	22.9	24.2	26.9	26.0	5.8	11.2	-3.3
Utah Residential Permit Value	Million Dollars	4,653	5,152	5,700	5,800	10.7	10.6	1.8
Utah Nonresidential Permit Value	Million Dollars	2,268	2,166	2,250	2,000	-4.5	3.9	-11.1
Utah Purchase-only Home Price Index	1991 Q1 = 100	446	493	528	561	10.5	7.1	6.3
<b>ENERGY PRODUCTION AND PRICES</b>								
West Texas Intermediate Crude Oil	\$ Per Barrel	51.0	64.9	56.7	52.0	27.4	-12.6	-8.3
Utah Coal Production	Million Tons	14.4	13.8	15.5	16.5	-4.2	12.3	6.5
Utah Coal Prices	\$ Per Short Ton	34.2	33.0	34.0	35.0	-3.5	3.0	2.9
Utah Crude Oil Production	Million Barrels	34.4	37.0	36.9	36.5	7.6	-0.3	-1.1
Utah Oil Prices	\$ Per Barrel	44.2	57.1	48.0	47.0	29.2	-15.9	-2.1
Utah Natural Gas Production Sales	Billion Cubic Feet	278	250	235	224	-10.1	-6.0	-4.7
Utah Natural Gas Prices	\$ Per MCF	2.72	2.77	2.80	2.50	1.8	1.1	-10.7
Utah Copper Mined Production	Million Pounds	334	466	425	440	39.5	-8.8	3.5
Utah Copper Prices	\$ Per Pound	2.85	3.00	2.72	2.65	5.3	-9.3	-2.6
<b>PRICES, INFLATION, AND INTEREST RATES</b>								
U.S. CPI Urban Consumers	1982-84 = 100	245	251	256	260	2.4	1.8	1.8
U.S. Federal Funds Rate	Effective Rate	1.00	1.83	2.17	1.63			
U.S. 3-Month Treasury Bills	Discount Rate	0.93	1.94	2.06	1.54			
U.S. 10-Year Treasury Notes	Yield (%)	2.33	2.91	2.14	2.12			
30-Year Fixed Mortgage Rate	Percent	3.99	4.54	3.93	3.92			

Sources: Utah Economic Council, State of Utah Revenue Assumptions Working Group, IHS Markit, and Kem C. Gardner Policy Institute.

### Utah Economic Council

Phil Dean, Governor's Office of Management and Budget, Co-Chair  
 Juliette Tennert, Kem C. Gardner Policy Institute, Co-Chair  
 Wes Curtis, Southern Utah University  
 John Gilbert, Utah State University  
 Natalie Gochinour, David Eccles School of Business/Salt Lake Chamber  
 Leslee Katayama, Utah State Tax Commission  
 Mark Knold, Utah Department of Workforce Services  
 Doug MacDonald, EconoWest  
 Thomas Maloney, University of Utah  
 Carrie Mayne, Utah System of Higher Education  
 Darin Mellott, CBRE  
 Michael Parker, Ivory Homes  
 Peter Reichard, Utah Foundation  
 Kate Rubalcava, Utah Nonprofits Association  
 Robert Spendlove, Zions Bank  
 David Stringfellow, Office of the Utah State Auditor  
 Andrew Wilko, Utah Legislative Fiscal Analyst Office  
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January 17, 2020

## H. ECONOMIC OUTLOOK

### Industrial Variety and the Southwest Utah Economy

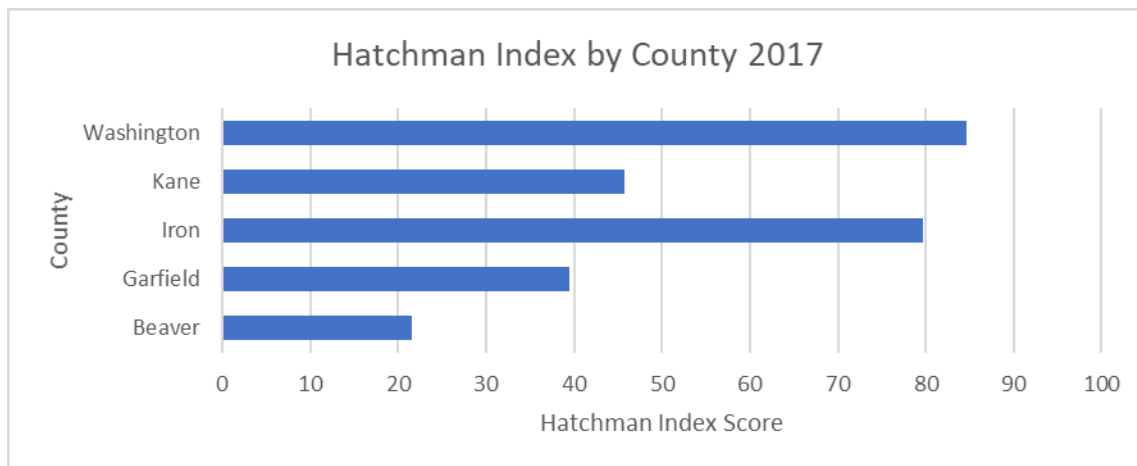
In regional policy circles, conventional wisdom holds that industrial diversity paves the road to economic stability and growth. On the other hand, empirical research suggests much less certainty to that axiom. Economic stability does seem to show a correlation with industrial diversity. However, economic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

#### Measuring Industrial Diversity

A multiplicity of industrial diversity measures exist. The Hachman Index is used to measure economic 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 100 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 2017, Utah's Hachman Index, scored a 96.9, placed it as one of the most industrially diverse states in the union. Nevertheless, statewide diversity does not translate into county-level diversity. In 2017, none of Utah's counties showed a Hachman index as high as the state figure. Indices ranged from 94.0 for Salt Lake County to 10.5 in Duchesne County. Relatively diverse Washington (84.7) and Iron (79.7) counties ranked third and fifth, respectively, among all Utah counties. Kane (45.7) and Garfield (39.5) counties showed far less employment diversity. Finally, Beaver County (21.5) 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 the rural counties the population is significantly smaller than in the in Washington and Iron County, and their economies are more concentrated in specialized industries. While a more diversified industrial distribution could be beneficial to the long-term stability of these counties, some may remain strong due to intrinsic qualities of the county, e.g. geography, or other non-replicable qualities unique to the area.



Iron County displayed a higher diversity ranking than its total employment level might suggest. This standing result is 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.

## All Southwest Utah Counties Finally Show Job Growth

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

As of September 2019, all of the counties in the Five County region saw positive Nonfarm job growth with the exception of Beaver County. For a full review of job growth in the region refer to the Economic Snapshot data diagrams provided by the Utah Department of Workforce Services on pages 28-42 of this document or at this link. <https://jobs.utah.gov/wi/data/misstats/lmi/>

	Labor Force	Employed	Unemployed	Rate
<b>Five County Total</b>	<b>106,345</b>	<b>102,569</b>	<b>3,776</b>	
Beaver	3,014	2,908	106	3.5
Garfield	2,789	2,572	217	7.8
Iron	22,815	22,001	814	3.6
Kane	3,798	3,676	122	3.2
Washington	73,929	71,412	2,517	3.4

Note: Numbers have been left unrounded for convenience rather than to denote accuracy; Data is preliminary.

Source: Utah Department of Workforce Services, Workforce Research & Analysis, Annual Report of Labor Market Information, 2018

## Recent Migration in Southwest Utah

Moving residences is a relatively common occurrence in southwest Utah. The tables and charts found in the Kem C. Gardner Policy Institute State and County Migration Age Patterns report indicate people of various age groups have moved in and out of this EDD region through its history.

County	Emerging Adults Net Migration	Young Adults Net Migration	Family Age Net Migration	Older Adults Net Migration	Total net Migration	Total Natural Increase
Beaver	-265	-72	194	176	3	621
Garfield	-177	-155	122	318	166	271
Iron	4,287	-28	-569	2,316	5,993	6,391
Kane	-263	-141	513	714	810	269
Washington	4,666	1,010	11,891	13,964	32,635	15,126

Source: Kem C. Gardner Policy Institute State and County

Migration Age Patterns; Winkler et al., 2013; Utah Population Estimates Committee

Note: Individual life-stage migration groups do not sum to total net migration due to omitted age groups (0-4 and 75+)

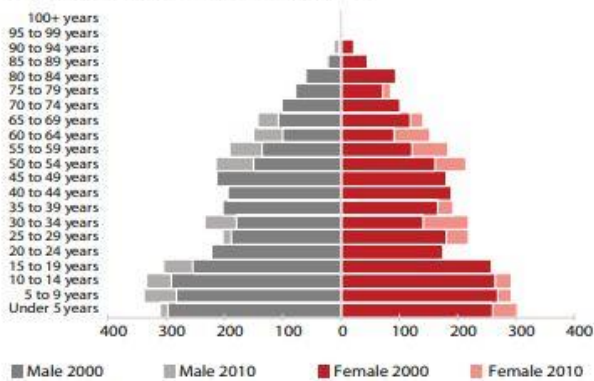
County	2000 Population	2010 Population	Absolute Difference	Percent Difference	Total Net Migration	Net Migration Share of Population Growth
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Beaver	6,005	6,629	624	10.40%	3	0%
Garfield	4,735	5,172	437	9.20%	166	38%
Iron	33,779	46,163	12,384	36.70%	5,993	48%
Kane	6,046	7,125	1,079	17.80%	810	75%
Washington	90,354	138,115	47,761	52.90%	32,635	68%
Source: Kem C. Gardner Policy Institute State and County Migration Age Patterns; U.S. Census Bureau, Decennial Census; Winkler et. Al, 2013						

## Beaver County

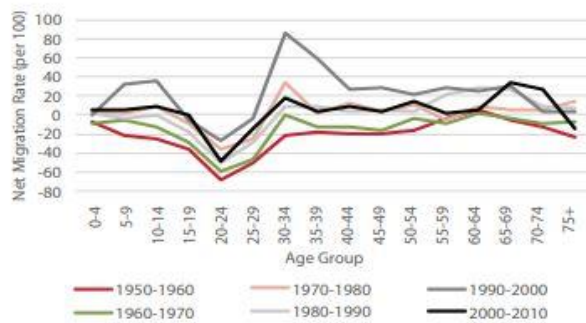
- Rural county
- Net out-migration from 1950s through 1980s
- 1980s and on: Both in and out-migration patterns consistent with rural typology
- Economic expansion in 1990s brought new migrants
- Maintains classic rural population pyramid and migration signature through the 2000s

### Population Pyramids, 2000 and 2010



Source: U.S. Census Bureau

### Historical Net Migration Rates, 1950-2010



### Current Net Migration Rates, 2000-2010

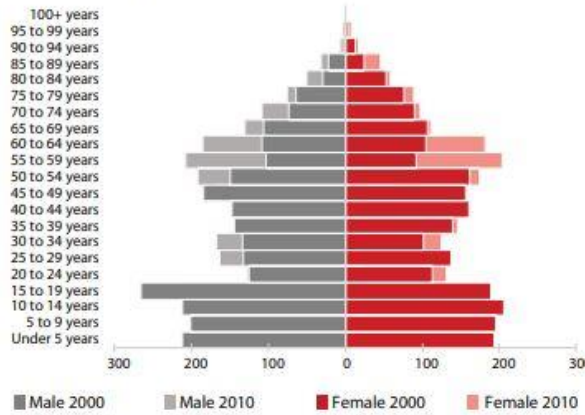


Source: Winkler et al., 2013

## Garfield County

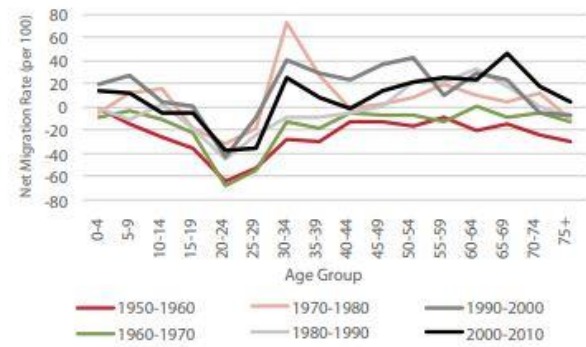
- Tourism county since 1990s
- Strong out-migration pre-1970s – was a rural county
- Tourism economy becomes established in the 1980s and on
- Migration peaks at young adult and older adult ages

### Population Pyramids, 2000 and 2010



Source: U.S. Census Bureau

### Historical Net Migration Rates, 1950-2010



### Current Net Migration Rates, 2000-2010

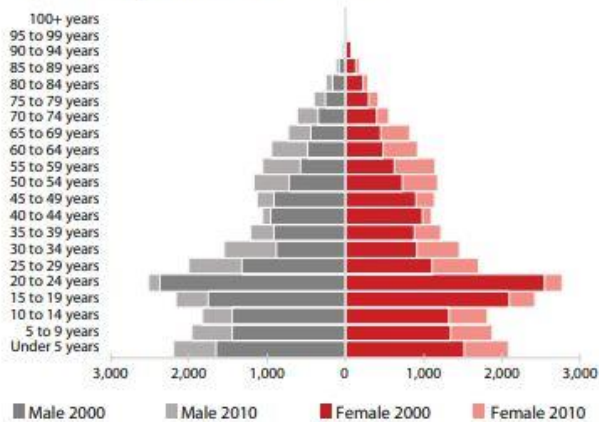


Source: Winkler et al., 2013

## Iron County

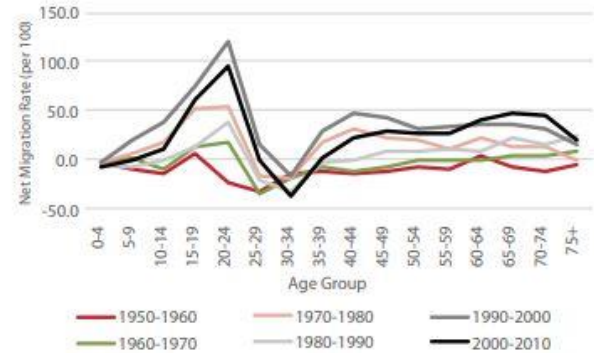
- College County – This migration signature becomes especially well established by the 1990s and 2000s
- Out-migration and much more rural in the 1950s and 1960s
- Recent strong population growth and migration in the 1990s and 2000s, some of which is retirement age
- Recent development of tourism is contributing to net-in migration of family age populations

### Population Pyramids, 2000 and 2010



Source: U.S. Census Bureau

### Historical Net Migration Rates, 1950-2010



### Current Net Migration Rates, 2000-2010

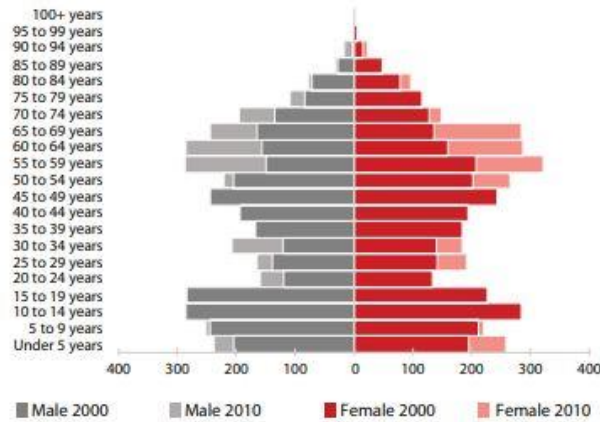


Source: Winkler et al., 2013

## Kane County

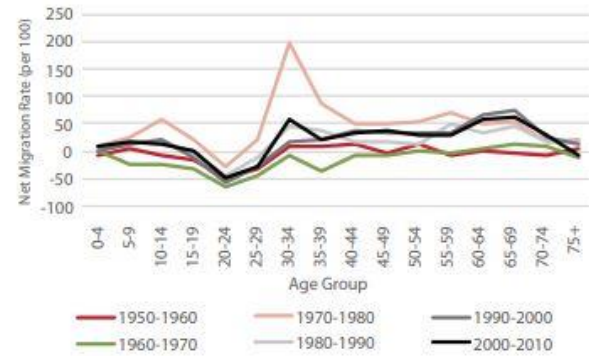
- Transitioned from rural county to tourism county
- Subject to booms (1970s) and busts of rural economy (Out-migration 1950s-1960s) and rural migration signature from 1950s-1980s
- Tourism and amenity migration signatures and in-migration in 1980s, 1990s, and 2000s

### Population Pyramids, 2000 and 2010

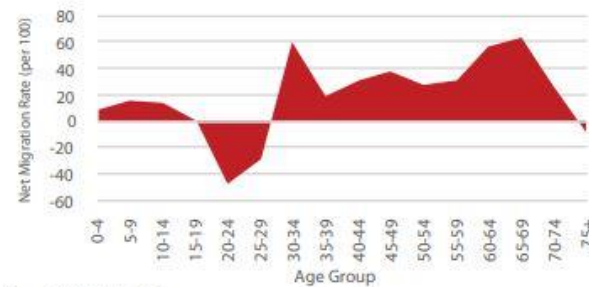


Source: U.S. Census Bureau

### Historical Net Migration Rates, 1950-2010



### Current Net Migration Rates, 2000-2010

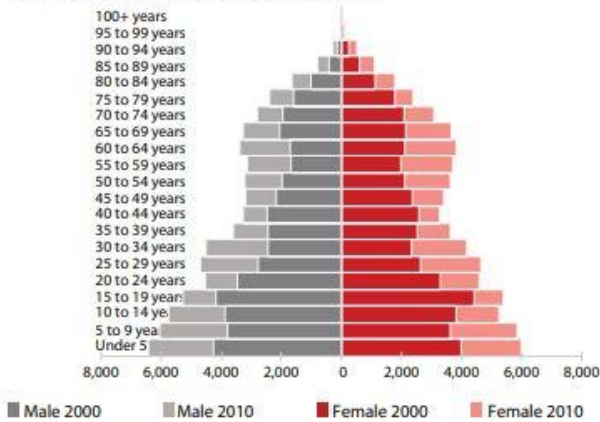


Source: Winkler et al., 2013

## Washington County

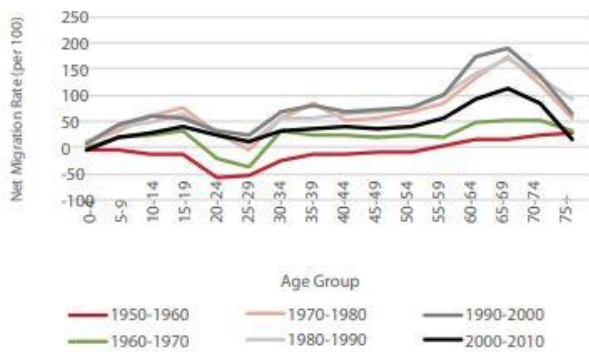
- Composite – county has steady in-migration across all age groups, though has a slight dip in the college and early employment years
- Retirement age destination, especially from 1970s on
- Net out-migration until turning positive in the 1960s – net in-migration since
- Among the most self-contained on commuting
- Rapid population growth, especially from 1980s and on
- Classified as a Metropolitan Statistical Area by the Census Bureau

### Population Pyramids, 2000 and 2010



Source: U.S. Census Bureau

### Historical Net Migration Rates, 1950-2010



### Current Net Migration Rates, 2000-2010



Source: Winkler et al., 2013



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

### **Natural Hazard Mitigation Plan 2017-2022**

The Five County Natural Hazard Mitigation Plan compiles data for eight natural hazards and establishes mitigation goals and activities. The current Five County Multi-Jurisdictional Natural Hazard Mitigation Plan (NHMP) is available to review at <https://hazardmitigationplan.org/2016-draft-plan/>. Specific individual community goals are available in the Hazard Mitigation Plan.

Natural hazard mitigation is any sustained action taken to reduce or eliminate the long-term risk to human life and property from hazards. Mitigation activities may be implemented prior to, during, or after an incident. However, it has been demonstrated that hazard mitigation is most effective when based on comprehensive, long term planning that is developed before a disaster occurs. The plan addresses many aspects of natural hazard mitigation planning including a risk assessment, summary of the hazards, and local mitigation strategies. All strategies are found in their respective sections.

The hazards identified in the Five County NHMP affect each jurisdiction in the region differently in each jurisdiction. Refer to the Plan for detailed analysis of local risk assessments and mitigation strategies. Information in the plan was compiled using the best available data. The following is a brief description of each hazard identified in the Plan.

#### **Flood**

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. Flooding is a temporary overflow into an area not normally deluged with water. Understanding the different types of floods that can occur in an area can greatly contribute to mitigation efforts. Some of the flood types in the Five County area defined by the National Weather Service-National Oceanic and Atmospheric Administration (NOAA) are:

Flash Flood - is a rapid and extreme flow of high water into a normally dry area, or a rapid water level rise in a stream or creek above a predetermined flood level, beginning within six hours of the causative event (i.e., intense rainfall, dam failure, ice jam).

River Flooding - occurs when river levels rise and overflow their banks or the edges of their main channel and inundate areas that are normally dry.

Burn Scars/Debris Flow - Wildfires burn away the vegetation of an area, leaving behind bare ground that tends to repel water. When rain falls, it runs off a burn scar towards a low-lying area, sometimes carrying branches, soil and other debris along with it. Without vegetation to hold the soil in place, flooding can produce mud and debris flows.

Ice/Debris Jams - A back-up of water into surrounding areas can occur when a river or stream is blocked by a build-up of ice or other debris. Debris Jam: A back-up of water into surrounding areas can occur when a river or stream is blocked by a build-up of debris.

Snow-melt - Flooding due to snow-melt most often occurs in the spring when rapidly warming temperatures quickly melt the snow. The waters run off the already saturated ground into nearby streams and rivers, causing them to rapidly rise and, in some cases, overflow their banks.

Dry Wash - When heavy rain falls over extremely dry land, the water rushes towards low-lying areas, which may include dried up canyon or riverbeds. This can quickly turn a dry channel into a raging river.

Dam Breaks/Levee Failure - A break or failure can occur with little to no warning. Most often they are caused by water overtopping the structure, excessive seepage through the surrounding ground, or a structural failure.

### **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. Flooding is among the most prevalent and destructive (annually) of the geologic hazards that affects Utah. This destructive trend is nowhere more evident than in the southwest part of the state.

### **Landslide**

The principal landslide is a gravity fed movement of rock and earth on an over-steepened slope. However, landslides include an extensive range of ground movement including Debris Flow, Slide, and Rock Fall.

Rock fall needs further addressing because it is one of the most common types of landslides in South Western Utah.

“Rock fall is a natural mass-wasting process that involves the dislodging and downslope movement of individual rocks and small rock masses. The combination of steep slopes capped by well-jointed, resistant bedrock formations such as the Shinarump Member of the Chinle Formation and numerous Quaternary basalt flows, makes rock fall the most common slope-failure type in the St. George – Hurricane metropolitan area. Rock falls pose a hazard because a rolling boulder can cause significant damage to property, roadways, and vehicles and thus pose a serious safety threat. Rock-fall hazards are found where a source of rock exists above slopes steep enough to allow rapid downslope movement of dislodged rocks by falling, rolling, and bouncing. Rock fall is also the most common type of slope failure caused by earthquakes. Earthquakes as small as magnitudes 4.0 have triggered rock falls. Additionally, slope modification such as cuts for roads and building pads or clearing of slope vegetation for development can increase or create a local rock-fall hazard”. (Utah Geological Survey)

Landslides transpire in every state in the union, and the Five County Region is no exception. Some of the factors that cause landslides in this region are over steepened slopes, excess weight, accumulation, duration, and intensity of precipitation, earthquakes, wildfire history, and man-made structures like roads and buildings that put additional stress on slopes, or undercut slopes.

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.

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 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, and tornadoes.

In an effort to guard against the negative effects of severe weather, the National Weather Service has designed the StormReady program. This program is a nationwide community preparedness program that uses an approach which helps communities develop plans to handle all types of severe weather. To be classified as a StormReady community several criteria must be met; however, the county Local Emergency Planning Committee (LEPC) is positioned well to satisfy the StormReady application/program guidelines. Ultimately the benefit of becoming formally recognized as a StormReady community lies in the additional planning/preparation/preparedness for severe weather occurrences; however, some grant opportunities are available through the National Weather Service as well as possible adjustment to insurance rates through the Insurance Services Organization (ISO).

### **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 the regions settlement in the mid-1800s, residents have been subject to the annual threat of wildfire. Lightning is a major cause of wildfire in the Five County region. However, the potential risk for human caused fires increases as urban land grows, causing the wildland development areas to increase.

There are many factors that affect wildland fires and how they will impact human development and settlement. The wildfire assessment includes data regarding Wildfire Risk. This factor includes many complex elements that will be discussed in this section. In addition the assessment is designed to give a better understanding of the risk and threat that faces the regions settlements.

The Five County NHMP is not an in-depth wildfire study of the Five County Region and should not be used as an end for determining property safety. The wildfire elements are intended to inform decision makers that wildland fires pose a significant risk to the region and aid with decisions and policies. For further information, or for an in-depth study of a specific area, please contact the Utah Department of Natural Resources Forestry Division.

### **Problem Soils**

Geologic and climatic conditions in southwestern Utah provide a variety of both localized and widespread occurrences of problem soils. They occur in a variety of geologic settings and are some of the most widespread geologic hazards. Some materials, such as expansive soil and limestone, cover large areas, whereas others, like active dunes, are of limited extent. The most extensive problem soils found in the region are expansive soil and rock.

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.

Types of soils in southwest Utah that can be considered hazard include Expansive soil and rock, Collapsible Soil, Limestone and Karst Terrain, Gypsiferous Soil/ Rock deposits, Soils subject to Piping, and Sand Dunes

### **Drought**

Drought is a normal reoccurring event when precipitation is below normal, droughts span anywhere from a few months to several years. For this reason, nearly every climate can experience drought, and each region undergoes drought differently. Because a drought is simply defined as below normal precipitation, the amount of annual rainfall that would be considered a drought in one climatic region might be completely different in another.

Precipitation is just one factor of a drought, other components include but are not limited to runoff, percolation, ground water recharge, temperature, wind, humidity, evapotranspiration, and streamflow into larger bodies of water. There are four main types of drought that consider these factors. (National Drought Mitigation Center)

- **Meteorological Drought:** Meteorological drought is based on how dry conditions are compared to “normal” or average conditions of a specific region.
- **Agricultural Drought:** The circumstances where soil water deficits no longer meet the demands of a specific crop during all stages of development.
- **Hydrological Drought:** These droughts are tied closely to the amount of precipitation there is, but it is referred to on the hydrological system, which refers to streams, rivers, lakes, and reservoirs. A hydrological drought time period usually follows a meteorological, or agricultural drought by at least a few months.
- **Socioeconomic Drought:** Occurs when the amount or lack of precipitation negatively effects economic goods and resources.

Drought information in Southwest Utah is based upon the Palmer Drought Severity Index (PDHI)Chart. For 35 years “the Palmer drought index has proven to provide one of the best indications of drought for much of the United States. It is superior to other drought indices in many respects because it accounts not only for precipitation totals, but also for temperature, evapotranspiration, soil runoff and soil recharge.” (National Centers for Environmental Information)

Drought conditions cover wide swaths of land and are currently examined within geographical boundaries called climate divisions. The four climate divisions in Southwest Utah are the Western, Dixie, South Central, and Southeast Divisions. These divisions are closely related to Utah’s geographic regions and drainage basins.

### **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.



Radon enters buildings through cracked foundations, cracked walls, gaps in suspended floors, gaps around service pipes, and many other open passageways. It can be at the highest concentrations in closed off areas such as basements.

It is important to be aware of radon in buildings where people spend a great deal of time because long-term, and high exposure to radon can cause lung cancer, even among non-smokers. Although there is insufficient data for radon caused lung cancer in Southern Utah, The Utah Environmental Public Health Tracking system states that it is the second leading cause of lung cancer in the U.S. and odds of contracting lung cancer dramatically increase when someone is exposed to both tobacco smoke and radon.

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 (pico-curies/liter), at which mitigation actions should take place. Radon gas remediation can be done, and testing is relatively easy and inexpensive (\$8-250).

Radon potential maps can help to determine where indoor radon may exist. However, the only way to know if a building is subject to this hazard is by testing. Generally testing only takes 2-3 days, but some longer-term tests take up to 90 days.

## **Earthquake**

Earthquakes are unpredictable and occur when blocks of earth slip releasing energy. The initial point of rupture takes place at what is called the Focus. The focus is on the fault and is usually miles below ground surface. The epicenter is the surface point directly above the Focus. Ground shaking or ground movement is caused from seismic waves, which discharge outward from the focus.

There are hundreds of earthquakes each year in Southern Utah, many of which are too small to be noticed. Earthquakes are regional hazards affecting multi-county areas, and because almost the entire area could experience a seismic event, all communities contain some degree of risk. Because ground shaking can proceed miles from the fault, an earthquake can trigger additional risks and hazards such as ground shaking, structure failure, soil liquefaction, surface fault rupture, slope failure, and flooding.

Ground shaking is generally the most destructive aspect of an earthquake because the seismic waves move both vertically and horizontally. Structural damage usually varies depending on the distance from the epicenter, size of the earthquake, and the type of sediment.

Liquefaction is a major cause of earthquake damage. During an earthquake the soil loses its strength and ability to hold the weight of structures. Liquefaction usually occurs in water-saturated soils, loose grained soils, and areas where ground water is less than or equal to 50 feet. In general liquefaction does not occur with earthquakes less than a magnitude five. Some of the adverse effects that structures are subject to during liquefaction are: Foundation Cracking, Buildings tipping, underground structures such as septic tanks can become buoyant, and liquefied soils and overlying materials may move down gentle slopes. Structures that are sensitive to liquefaction are: building with shallow foundations, railways lines, highways, bridges, buried structures, dams, canals, retaining walls, and utility poles and towers.

Fault rupture is significant ground movement that causes blocks of earth to be uplifted and downthrown. This movement creates fault scarps and has the potential to cause tectonic subsidence.

Earthquakes can cause debris flow, rock fall, and landslides. In some instances, the landslides can become natural dams for streams which will ultimately cause flooding.

## **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

Paranuweep 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

Common Name	Scientific Name	Status*
Greater Sage-grouse	<i>Centrocercus urophasianus</i>	C
Utah Prairie-dog	<i>Cynomys parvidens</i>	T
Least Chub	<i>Notichthys 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

Common Name	Scientific Name	Status
Ute Ladies'-tresses	<i>Spiranthes diluvialis</i>	T
Jones Cycladenia	<i>Cycladenia humilis</i> var <i>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

Common Name	Scientific Name	Status
Least Chub	<i>Notichthys 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

Common	Name Scientific Name	Status
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**

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

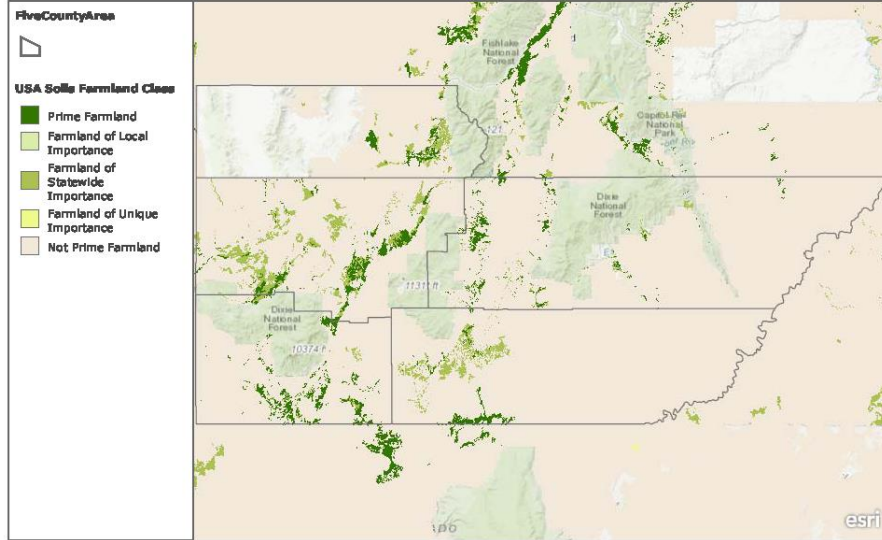
There are no unique lands identified in the Five County region, however there are prime farmlands and farmlands of statewide importance and acreage:

<b>Lands</b>	<b>Acres</b>	<b>Percent</b>
Prime Farmlands	276,685 Acres	2.5%
Farmlands of Statewide Importance	319,332 Acres	2.8%
Not Prime Farmland	8,127,790 Acres	72.0%
Total Five County Area	11,282,358 Acres	100.0%
Undefined Areas	2,558,551	22.7%
Source: ESRI, Natural Resources Conservation Service		

3/17/2020

Prime Farm Land

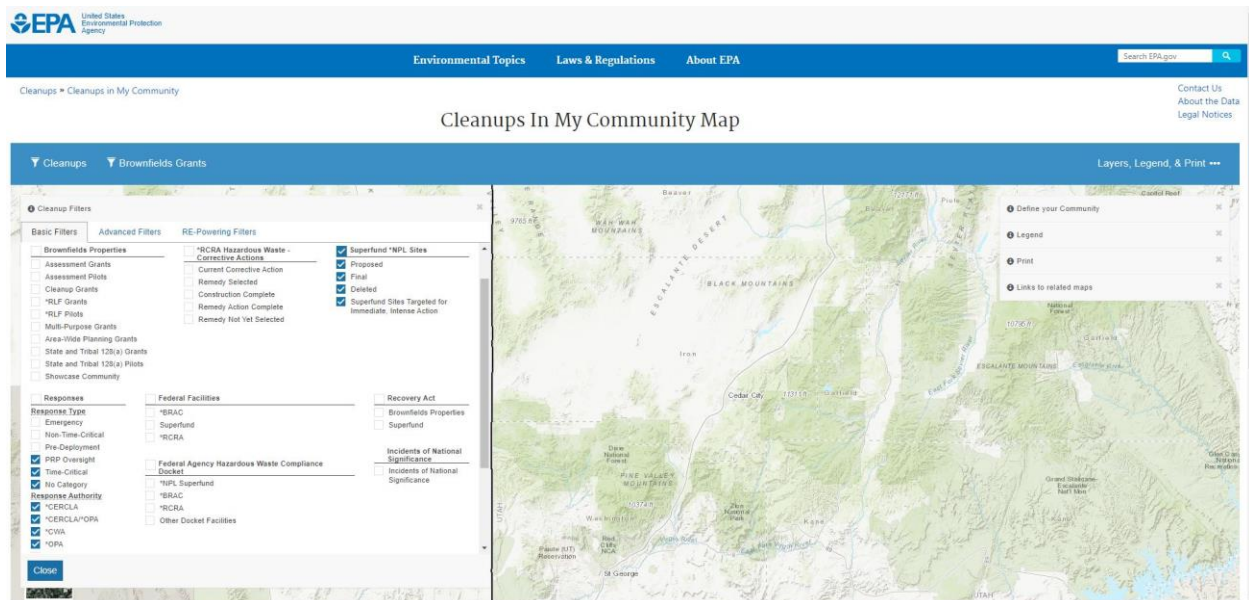
### Prime Farm Land



Esri, HERE, Garmin, FAO, USGS, EPA, NPS | Source: USDA NRCS, Esri

## Superfund, Comprehensive Environmental Response

According to the Environmental Protection Agency web site <https://www.epa.gov/superfund/search-superfund-sites-where-you-live> checked on March 17, 2020, there are no Superfund Cleanup Sites located anywhere in the five southwestern counties of Beaver, Garfield, Iron, Kane or Washington County.



## 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.

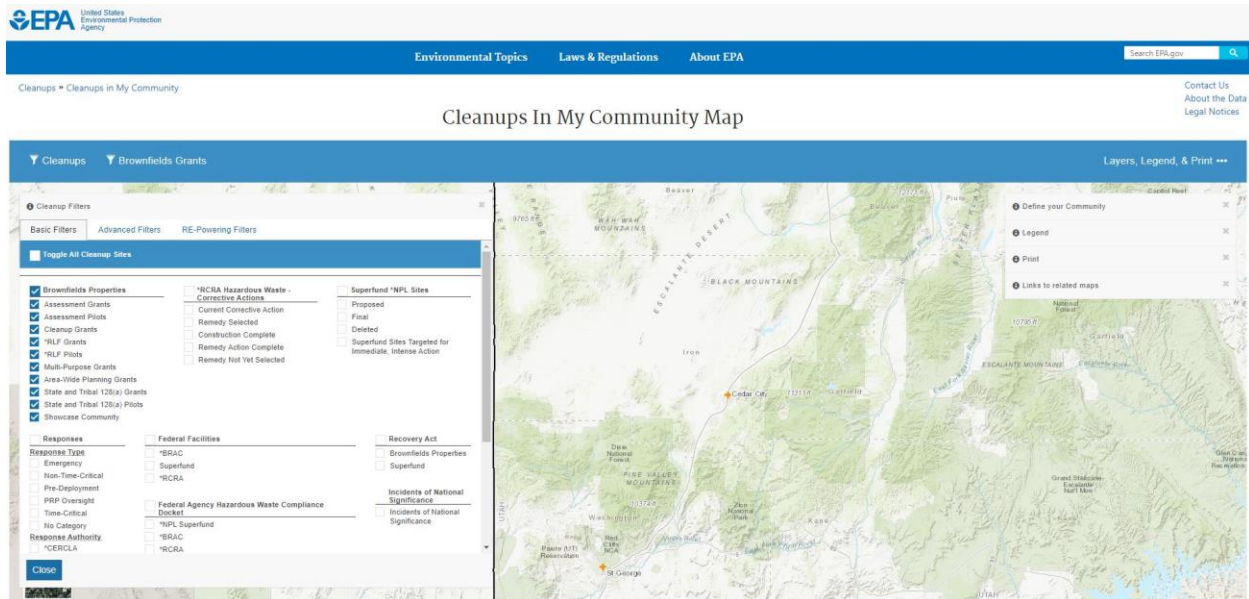
### **Brownfields**

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 United States Environmental Protection Agency website was searched and according to this report located at:

[https://ofmpub.epa.gov/apex/cimc/f?p=cimc:map:::71:P71\\_WELSEARCH:NULL|Cleanup|||false|false|true|false|false|false||sites|Y](https://ofmpub.epa.gov/apex/cimc/f?p=cimc:map:::71:P71_WELSEARCH:NULL|Cleanup|||false|false|true|false|false|false||sites|Y) there are two brownfields located in the five counties of southwestern Utah. They are at the Cedar City Abandoned Up Railroad Row and the Paydirt Properties.





### Major manufacturers 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 cognizant of these areas and mitigates concerns with any Five County AOG projects to assure that a project will not be located in or impact a wellhead protection area.

### Nonattainment Areas 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.

### **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, or cultural sites 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 issue-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.

A Pandemic such as the COVID-19 outbreak can affect nearly every sector of the economy. Pandemics and other events can negatively affect the economy locally or globally without warning. For this reason, it is imperative to plan for these types of events. “The Utah Leads Together economic response plan recognizes the importance of facing uncertainty with a dynamic, data-informed, and unified Plan.” (Utah Leads Together) Five County Association of Governments will work with State and other pertinent agencies in their planning efforts to avoid economic declines due to such events. Regional efforts include the Greater Together Small Business Resilience Fund.

### **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 2021. The region is prepared for unforeseen disasters through active police, fire, and CERT trained professionals. The Revolving Loan Fund program is set up to help small business receive gap financing and other loans. The Southwest Utah Public Health Department has a mission to enhance the capability and capacity of individuals and communities; to prepare for, respond to, and recover from man-made or natural disasters that affect the health of the southwest Utah population. The Southwest Utah Public Health Department provides guides, a website, and pamphlets that are available to the public for educational planning and awareness of disasters.

Five County Association of Governments will continue to work with agencies to help the region be more economic resilient. Work needs to continue in the pre- and post-incident environment to include steady-state and responsive initiatives. Five County will continue to support local initiatives and will research methods and promote activities that advance economic resilience. Examples of such initiatives can include maintaining GIS that link with municipal business licenses, tax information, and other business establishment data bases to track local and regional economic churn; GIS can be integrated into the Regional CEDS to serve as database for local economic development partners; Promote business continuity and preparedness.

### **Flexibility**

The District does understand its assets through the involvement of local elected and government officials. Major employers seem to have access to enough 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 can 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 2020 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.

Five County AOG will be working closely with local economic leaders to promote entrepreneurship activities through the Region. The partners that are heavily focused on entrepreneurship are the Atwood Innovation Plaza at Dixie State University, the Entrepreneurship Center at Southern Utah University, and the Small Business Development Centers at Dixie Tech and Southwest Tech.

## **L. Area Sector Analysis Process (ASAP)**

The economic structure of the United States is changing rapidly. Consequently, the economies of many communities are struggling with limited employment opportunities and stagnant wages, especially for working class, service, and blue-collar jobs. In rural communities, problems are compounded because of declining employment in agriculture, mining, logging, and manufacturing, historically the primary employers of rural Americans. Such is the case with many communities in the Five County EDD.

The ASAP model and process has been applied or is in the process of being applied, in areas throughout the District. The ASAP process consists of six modules that are delivered to the communities once each month for six months. Module topics are:

- 1 - Introduction and Overview of the ASAP Process;
- 2 - Community Goals and Assets: Acquiring County Data and Surveys;
- 3 - Overview of County Socioeconomic Factors;
- 4 - Presentation and Discussion of ASAP Output (Target Industry Data Report analyzed and discussed);
- 5 - Quantitative Analysis of ASAP Results;
- 6 - Applying ASAP Results to Community Economic Development Efforts.

The ASAP process matches community survey and asset input with industry data. The ASAP model helps communities determine industries that are both desirable for residents and compatible with industry needs. Extensive data and information are provided to the community on industries that are both desirable and compatible and are selected by the steering committee for further research and analysis. Utilizing ASAP output, the ASAP team helps the community team to develop and implement an economic development strategic plan.

A steering committee from each county in the region prioritized industry sector to target several of the ranked NAICS Sectors. The following is the list of targeted industry sectors by county:

### **Beaver County**

- The available ASAP documentation for Beaver County does not indicate any County prioritized target industries from the high ranking NAICS Sectors. High ranked sectors identified in the ASAP include, but are not limited to, 2211 Electric Power Generation, Transmission and Distribution; Animal Food Manufacturing; Dairy Product Manufacturing.

## **Garfield County**

- The available ASAP documentation for Garfield County does not indicate any County prioritized target industries from the high ranking NAICS Sectors. High ranked sectors identified in the ASAP include, but are not limited to, 1153 Support Activities for Forestry; 2371 Utility System Construction; 3132 Fabric Mills.

## **• Iron County**

- Iron County is currently in the ASAP process. They have not yet selected target industries from the high ranking NAICS Sectors. High ranked sectors identified in the ASAP include, but are not limited to, 2211 Electric Power Generation, Transmission and Distribution; 3254 Pharmaceutical and Medicine Manufacturing; and 3341 Computer, Plastics Product Manufacturing, and Peripheral Equipment Manufacturing. Iron County will finish the ASAP process and select their target sectors before the end of the year.

## **• Kane County**

- Internet Based Sectors – Kane County has exceptional amenity advantages. *It also has exceptional broadband capability and services for a rural county. This resource could and should be the basis for developing and marketing Kane County businesses.* There are a growing number of jobs that are Internet and computer based where it is no longer necessary to be in the office on a daily basis. Many people with these types of jobs would prefer to live in a place like Kane County where they can enjoy the advantages of rural living while taking advantage nearby amenities.
- Scenic and Retreat Opportunities – Kane County already has some businesses where people can spend time, relax and heal. Similarly, businesses often look for places where they can schedule a retreat. There are extensive opportunities for the expansion of this sector in Kane County. Available activities may include opportunities to view the night sky, photo classes, and zip lining. Of course, this sector does not exclude traditional tourism opportunities, but this sector has many advantages over basic tourism. First, it is less seasonal as some of these activities could occur throughout the year. Second, it creates more skilled jobs. Third this sector could be under local ownership.
- Improved restaurants and attracting a higher quality of hotels. Improvements of these sectors would help make it easier to achieve the two opportunities listed above and would improve the quality of life for local residents. Additionally, improvements in this sector would aid in encouraging tourists to stay longer and spend more money.

## **• Washington County**

Utilizing this information and their knowledge of the community, the Washington County ASAP steering committee selected sectors to be the target of future economic development efforts.

The targeted sectors are:

- Advanced Manufacturing – this includes the NAICS codes of:
  - 3341 – Computer and peripheral equipment manufacturing
  - 3344 – Semiconductor and other component manufacturing
  - 3345 – Navigational, measuring, electromedical and control instruments manufacturing
- Expertise in Research and Information Technology

- 5413 – Architectural, engineering and related services
- 5415 – Computer system design and related services
- 5417 – Scientific research and development services

### III. CHALLENGES AND OPPORTUNITIES

#### **Strengths, Weaknesses, Opportunities, Threats**

In the summer of 2018, Dixie State University (DSU), in collaboration with Southern Utah University (SUU), was awarded a University Center (UC) Grant from the Economic Development Administration (EDA) that extends over a five-year period beginning in October 2018. The grant was designed to supercharge the entrepreneurial ecosystem in Southwestern Utah and support business growth throughout Utah's Five County Association of Governments (AOG) Region. This region includes Washington, Iron, Kane, Beaver, and Garfield counties. This grant helps develop and deliver entrepreneurship education, programing and resources through the support of economic development stakeholders in all areas of the five-county region.

Together, DSU and SUU are interested in developing a robust strategy to identify and grow key target industry clusters through entrepreneurship. Through this collaboration between DSU and SUU, along with the supporting EDA grant, we anticipate the creation of new businesses and higher-paying jobs, the expansion and retention of existing businesses, and the diversifying and strengthening of local economies.

The awarded UC EDA grant includes specific activities and performance measures that must be fulfilled. One of the activities specific to this UC EDA grant is conducting an industry analysis that provides the Business Resource Centers (BRCs) at both DSU and SUU and their stakeholders an understanding of the region's potential for high capacity growth through entrepreneurship. A primary focus of this grant, and the BRCs' efforts, is to aide in the creation of sustainable high paying jobs through launching new businesses. By supporting entrepreneurship and business creation, the BRCs and their stakeholders will support economic expansion throughout the region. The intent of this study is to provide the following information to the BRCs and local economic stakeholders:

- 1- Current economic assets/infrastructure in Utah's Five County Association of Governments Region that support startup activity.
- 2- Characteristics of the existing economic landscape in the five-county region
- 3- Targeted industries which are primed for rapid job and market expansion in this region
- 4- Provide a proposed "growth through entrepreneurship" strategy for top-rated industries

Prior to the initiation of this study, four target industries were identified as target growth industries for the region. The following industries must also be analyzed, even if they are not considered top growth industries: Technology, healthcare, biomedical, and aviation

It is the intent to provide economic leaders, elected officials, community leaders and others throughout the Five County Region with a data driven economic development study that provides an in-depth analysis of the current assets and potential for future growth of targeted industries through entrepreneurship. Using the information provided from this study, DSU and SUU, along with economic stakeholders, will create and implement a regional economic development strategy that will leverage entrepreneurship as a tool to stimulate economic growth and diversity.

There is a plan to continue to build from this study. The full study is housed at Dixie State University, Southern Utah University, and the Five County Association of Governments. The following is the executive summary from the Fueling Economic Growth Through Entrepreneurship Study.



### Strengths

Among the strengths identified were a growing economy that provided rich soil in which an entrepreneurial ecosystem can grow; a location that provides a durable source of competitive advantage; an uncommon level of unity among its citizens and leaders; and finally, a pioneering culture that is conducive to entrepreneurship. Together, these strengths put Southwestern Utah in a favorable position for fostering an entrepreneurial ecosystem.

### Weakness

This study also identified several weaknesses: a severe lack of risk capital in the region; a tendency to under-compensate employees relative to their worth; fairly siloed social circles that may inhibit entrepreneurial activity; and both inter- and intra-regional brain drain. The report views these weaknesses as surmountable and suggests ways to address them.

### Opportunities

In terms of opportunities, the study highlights: the many 'alumni' of the region that would like to return; the abundance of experienced retirees who could mentor entrepreneurs; the region's suitability as a second headquarters for the innovative arms of established companies; the many success stories that can be leveraged to accelerate growth; and the opportunity to build international connections with the many visitors to the region as well as through University exchange programs.

### Threats

The study then briefly notes three high-level threats that have plagued ecosystem system development elsewhere, and which Southwestern Utah may face. These include leaders optimizing around their narrow constituencies rather than the overall interest of the region; unbridled growth that undermines future growth; and misguided investments in facilities or programs that are not what entrepreneurs actually need.

## **B. Demographic Shifts**

As the baby boomer generation retires there will be more retirees than ever before. This does not necessarily mean that the workforce will grow more slowly in future decades. Millennials have surpassed the number of baby boomers. The younger workers are adding to the workforce and are bringing knowledge of modern technology in the workplace at a fast pace. The population coincides with the workforce becoming more racially and ethnically diverse, according to the U.S. Census Bureau.

According the Bureau of Labor Statistics 68.7% of the current labor force is made up of Whites This does not mean that the share of workforce will remain the same. According to the 2017 U.S. Census projections only 36.5% of the youth in 2060 will be Non-Hispanic White, compared to 51.1% today. Based on this projection, it is likely that a larger share of the work force will be more racially and ethnically diverse in the future than it is today. EDD Opportunity Over time for 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.

## **C. 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.

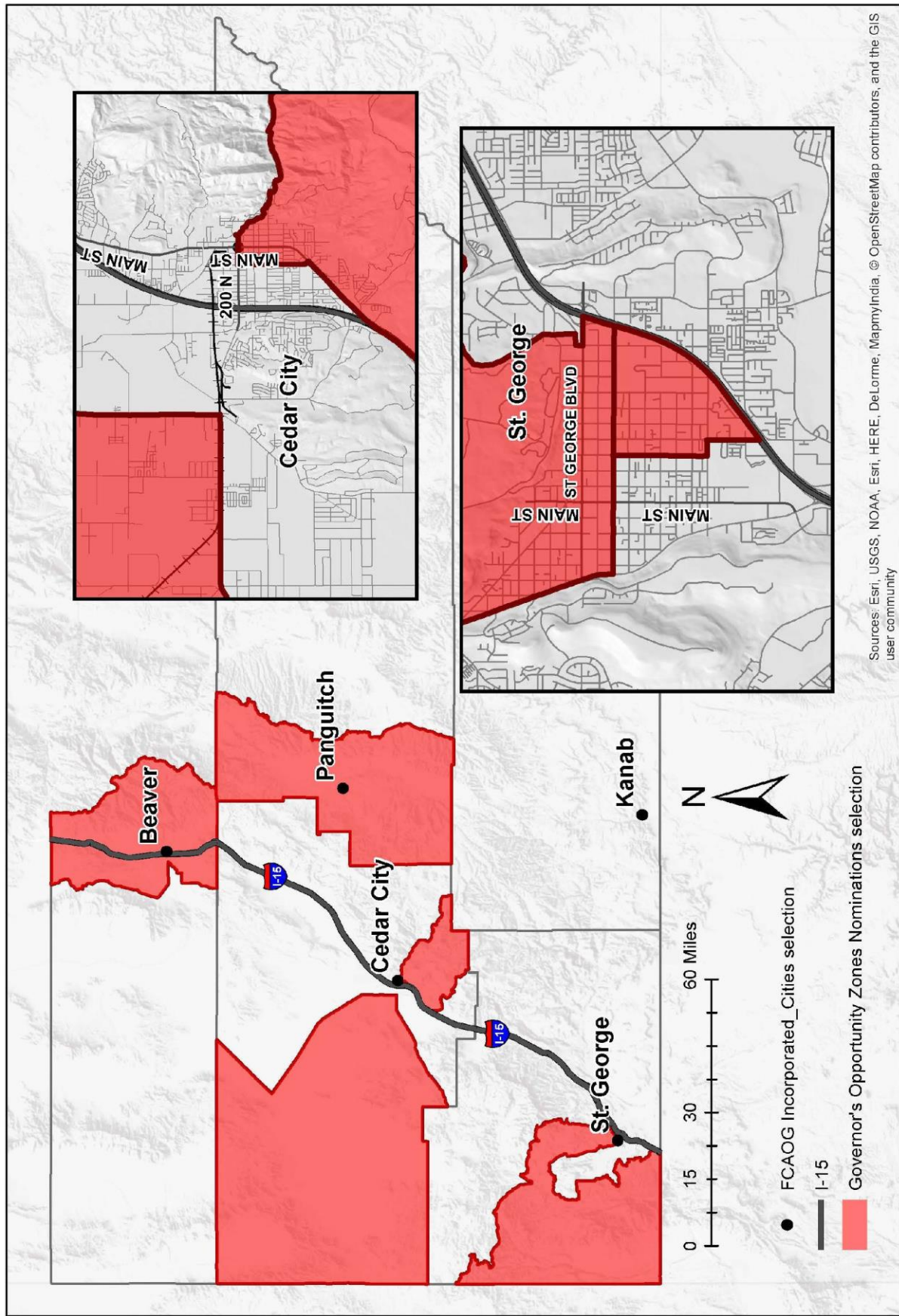
**EDD Opportunity** The opportunity for the region is one of decision-making. Communities within the EDD can make decisions regarding urban growth patterns that can directly influence how much environmental impact the region will have. The region is seeing the creation of new industry opportunities and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

Utah's energy industry is diverse and impacts the economy both statewide and locally. The full report on Economic Impacts of Utah's Energy Industry is at this link. <https://gardner.utah.edu/wp-content/uploads/EnergyReport-Feb2020.pdf> The following two pages is the brief from the Economic Impacts of Utah's Energy Industry, 2017 report.

## **D. Opportunity Zones**

Economic Development partners are working with investors that are seeking investment opportunities in Opportunity Zones. Five County will work with and/or support community stakeholders, state and local government leaders, and investors and developers in their efforts to create jobs in Opportunity Zones. The map below depicts the designated Opportunity Zone census tracts. See Map on the next page.

# Five County Qualified Opportunity Zone Nominations from the Governor



## Economic Impacts of Utah's Energy Industry, 2017

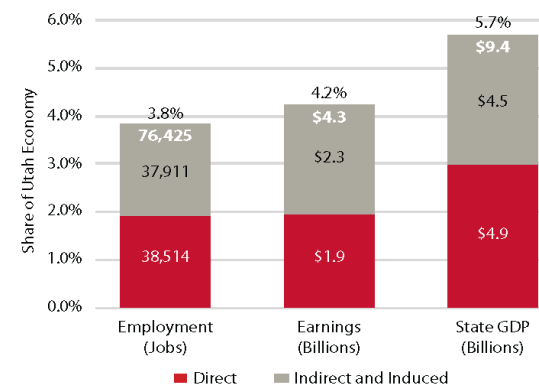
### Analysis in Brief

Utah's diverse energy industry plays a significant role in the state's economy. It encompasses traditional fossil fuels and renewable resources. The mining sector produces crude oil, natural gas, and coal. Power producers generate electricity from hydropower, geothermal, solar, wind, and biomass resources and distribute it within the state and across the western U.S. Five refineries process crude oil from Utah, Colorado, Wyoming, and Canada, and Utah has the only licensed and operating uranium mill in the country. Dozens of firms manufacture machinery for mining and the oil and gas fields as well as turbines, generators, transformers, and other electrical equipment. There are more than 60 petroleum wholesalers and 30 fuel dealers across the state. Solar installation and energy efficiency activities support thousands of jobs.

#### Key Findings

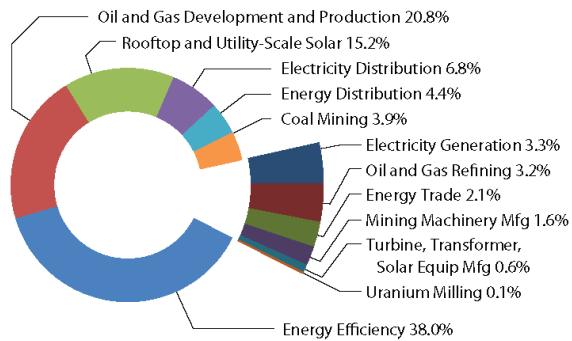
- **Share of the Economy**—In 2017, Utah's energy industry directly and indirectly supported 3.8% of the state's employment, 4.2% of its earnings, and 5.7% of its gross domestic product (GDP).
- **Jobs**—Energy activities provided an estimated 38,514 full- and part-time jobs, 1.9% of total jobs in the state.
- **Earnings**—Energy workers earned more than \$1.9 billion in 2017, 1.9% of total earnings paid.<sup>1</sup> Average earnings (excluding energy efficiency jobs) were \$81,257 per annum, 60% higher than the statewide average for all industries.
- **GDP**—Utah's energy industry directly contributed \$4.9 billion to the state's GDP, 3.0% of the total.<sup>2</sup>
- **Multiplier Effects**—Energy industry purchases supported an additional 37,911 jobs, \$2.3 billion in earnings, and almost \$4.5 billion in state GDP. The energy industry's total economic impacts in Utah in 2017 included 76,425 jobs, \$4.3 billion in earnings, and \$9.4 billion in state GDP.
- **State and Local Fiscal Impacts**—Energy-related royalties, severance taxes, conservation fees, property taxes, and sales taxes totaled \$492.1 million in 2017.
- **Low Retail Energy Prices**—Prices range from 6% to 23% below the national average for most energy users. At current consumption levels, if Utahns were paying national average prices they would pay \$578.4 million more for electricity and natural gas. Because of these low prices, state GDP is about 0.4% larger than it would have been under national average prices, employment is about 0.3% higher, and earnings are about 0.7% higher.
- **Energy Production**—In 2017, Utah produced
  - 34,437,937 barrels of crude oil worth \$1.6 billion, 11th in the nation
  - 315,197,367,000 cubic feet of natural gas worth \$1.0 billion, 13th in the nation
  - 14,417,284 short tons of coal worth \$505.1 million, 10th in the nation
  - 32,315,000 MWh of electricity from coal, natural gas, and other fossil fuels
  - 4,922,000 MWh of electricity from solar, hydro, geothermal, wind, and biomass
  - 2,211,000 MWh of utility-scale solar, fifth in the nation

Utah Energy Industry Economic Impacts, 2017



Note: Does not include direct earnings and GDP associated with energy efficiency jobs.  
 Source: Kem C. Gardner Policy Institute analysis of data from the Utah Department of Workforce Services, U.S. Bureau of Economic Analysis, Utah Geological Survey, National Association of State Energy Officials, Energy Futures Initiative, and Energy Fuels using the REMI PI+ model

### Energy Industry Employment by Sector, 2017



Sector	Jobs
Energy Efficiency <sup>1</sup>	14,626
Oil and Gas Development and Production	7,999
Rooftop and Utility-Scale Solar <sup>2</sup>	5,862
Electricity Distribution	2,602
Energy Distribution	1,710
Coal Mining	1,496
Electricity Generation	1,290
Oil and Gas Refining	1,223
Energy Trade	809
Mining Machinery Manufacturing	601
Turbine, Transformer, Solar Equipment Manufacturing	250
Uranium Milling	46
<b>Total</b>	<b>38,514</b>

1. Includes jobs where workers spend at least half of their time on energy efficiency-related tasks.

2. Excludes jobs at solar utilities and solar equipment manufacturers, which are counted in those sectors.

Source: Utah Department of Workforce Services; Bureau of Labor Statistics, Quarterly Census of Employment and Wages; Bureau of Economic Analysis; National Association of State Energy Officials; Energy Futures Initiative; Solar Foundation; Energy Fuels

## 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**

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.
- Delivery of technical planning assistance.
- 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 Plan and Annual Action 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.
- 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
- 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, 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 Tourism 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.
- Continue to support local economic development groups with their goals.

## **B. Action Plan**

### **Region-wide Strategies**

In 2018 Governor Herbert challenged all Counties in Utah except Salt Lake County to write down their top economic goals and go over the goals with the Governor's Office. The Governor implemented a program to help each county achieve their goals. All five counties in southwest Utah completed an Economic Development Plan containing their goals. The following is a summary explanation of each county's Plan and goals. Full reports are housed their Respective County Economic Development Departments.

### **Beaver County Strategies**

The Beaver County Economic Development Department's mission is to improve the economic well-being of the communities in the county through efforts that entail job creation, job retention, tax base enhancements, and quality of life.

The Beaver County Economic Development plan identifies the existing major industries, community resource assets, and the State programs that are being used in the County. The Plan also covers their economic development goals and efforts to reach achieve their goals. The following is Beaver County's summary:

#### **Existing Major Industries**

- Leisure & Hospitality
- Utilities
- Mining
- Agriculture

#### **Community Resource Assets**

- Railroad and RR Spur Access
- Abundant Renewable Energy Sources
- I-15 & I-70 Access. Midpoint: Salt Lake & Vegas. Denver & Los Angeles
- Abundant land for growth and expansion
- Air Quality capacity
- Competitive tax rates
- Full utilities for efficient operations (including fiber optic)
- Abundant mineral resources – Copper, Potash, Alunite

#### **State Programs used in Beaver County**

- Fast Track Grant
- Enterprise Zone Tax Credit
- Business Expansion & Retention
- Tax Increment Financing
- High Cost Infrastructure Tax Credit

#### **Economic Development Goals**



- Foster business expansion within existing industries
- Establish an entrepreneur culture & organize support re-sources
- Have an active business recruitment strategy (inter & intra state)
- Workforce Development—including soft skills
- Affordable Housing Development

#### **Effort Towards Goals**

- Using BEAR program to meet existing businesses needs
- Using State & Federal programs as applicable
- Publication of the “Economic Contributor” in local newspaper
- Monthly entrepreneur meetings lead by private sector
- Partnering with Quatere for entrepreneur leadership model
- Working through the Area Sector Analysis program & EDCU on industry clusters & recruitment strategy
- Partnering with Southwest Tech

#### **Garfield County Strategies**

The Garfield County Economic Development Office acts as a liaison for all economic development in the County. The two major goals of the Economic Development Office are 1) business expansion and retention and 2) business recruitment.

With the help of the Governor's Office of Economic Development (GOED) Office of Rural Development (ORD), United States Department of Agriculture (USDA), Five County Association of Governments, Community Impact Board (CIB) and many others, the Economic Development Director works with businesses in Garfield County to provide resources and programs to sustain business and improve employment opportunities.

The Economic Development Director's role in the incentive process is to a) spread awareness of the programs to businesses in the County, b) help businesses determine eligibility to specific programs, and c) aid in the application process to give the businesses a greater chance of approval.

The Garfield County Economic Development plan provides a brief for the County's economic profile, County assets, County issues, economic development mission, economic development strategies, and the State of Utah participation. The following is Garfield County's six economic strategies:

**1. Support existing enterprises.** Bring about conditions that support the continuation and expansion of existing local businesses. Target sectors include: (1) commercial businesses and services, (2) tourism, (3) healthcare, (4) forest products and (5) livestock production.

**2. Develop infrastructure.** Provide infrastructure to support County-wide economic sustainability. Target areas include: (1) culinary water supply, (2) housing, (3) cell service, (4) roads, (5) airports and airstrips, (6) downtown revitalization, and (7) remote area electrification.

**3. Manage federal lands to benefit both the environment and communities.** Bring about a situation where federal land management agencies make meaningful contributions to County-wide economic stability and expansion, especially in the areas of tourism, forest products, and ranching. Specific targets include (1) Hole in the Rock State Park, (2) tourism, (3) vegetation restoration, (4) livestock/wildlife water sources, (5) fire management (including WUI and municipal water supply), (5) roads, (6)

county/municipal land acquisition, (7) federal hiring practices, (8) Monument land use plans/policies, and, at the national level, (9) reasonable PILT and SRS payments.

**4. Diversify and expand tourism and outdoor recreation opportunities.** Ensure a tourism industry that is sustainable, robust, and serves a diverse range of year-round visitors throughout the County. Actions include: (1) road improvement and legal road access, (2) directional and public safety signage, (3) enhanced tourism and economic opportunity in throughout the EDD, (4) opening of Monument roads to ATVs, (5) a 100-mile bike hut-to-hut trail, (6) a Monument mountain bike trail system, (7) snowmobiling and ski touring, (8) cultural resourced-based recreation, (9) access to Lake Powell, (10) Garfield County Tourism Office outreach (11) a County recreation guide. (12) Work with cities, towns, and counties that are planning for and developing trails. (13) Support USDA on their 10-Year Trail Shared Stewardship Challenge. Plan and build-up trail networks in the Five County Region.

**5. Attract New Enterprises.** Attract and retain a range of diverse businesses and economic enterprises that offer living wage employment for existing and prospective County residents. Sectors to address include: (1) computer technical services, (2) energy resources, (3) light manufacturing, (4) retail and commercial services, (5) visitor services, (6) professional services (e.g., veterinary), (7) trades (e.g., appliance repair, plumbing), (8) value-added forest products, (9) value-added livestock production, and (10) other opportunistic ventures.

**6. Initiate Special Projects.** Construct select projects that provide multiple economic and community benefits. Priorities are: (1) a natural and cultural history field research center and museum, and (2) a multiple-purpose reservoir.

#### **Increasing the Likelihood of Successful Implementation**

Possible strategies include: (1) funding a County (or multiple-county) economic development coordinator, (2) establishing a Garfield County Chamber of Commerce, and, (3) either designating a Federal Government liaison to coordinate with the County and State, or establishing an inter-governmental public lands coordination team.

#### **Iron County Strategies**

The Office of Economic Development is committed to countywide economic development. The mandate for this office is to provide rich business resources for the creation, growth, and recruitment of companies to Iron County and Cedar City while focusing on community strengths, resources, and environment.

The Iron County Economic Development plan focuses on industry clusters, manufacturing, renewable energy, small business development, tourism, and ongoing challenges. The Plan also covers their economic development goals and efforts to reach achieve those goals. The following is Iron County's goals:

##### **1-YEAR VISION: 2019**

- Describe where you would like your county to be economically one year from now.
  - We would like to continue on our current trajectory of economic growth at a manageable pace.
- What challenges would you like to overcome?
  - We hope that Federal Prairie Dog management will closely match the state's management strategy for the past couple of years, allowing continued development on

privately-owned property with minimal obstruction. We are encouraged by the federal government's new direction. We hope to see the species delisted as an endangered species.

- What opportunities would you like to take advantage of?
  - The Cedar City Chamber of Commerce is initiating its Vision 2050 program, including Iron County, Cedar City, Southern Utah University, and other community entities, both private and public, to coordinate vision and strategic planning. The Chamber is currently exploring Envision Utah's process to guide this planning. I Southern Utah University is constructing a new business building and they are working to better integrate their facilities and their programs with the community. The school of business recently organized a local entrepreneurship council. We plan to work with this group to explore new local business opportunities.
- What economic growth would you like to see happen?
  - I Healthy growth is occurring in Iron County as Southern Utah University continues to grow, and as new residents continue to move here for various reasons. We would like to see continued growth in each of our business cluster areas to help balance this growth.
- Are you interested in short-term recruitment or expansion?
  - We are more interested in long-term projects, though the promise of more utility-scale solar will bring with it short-term expansion in the construction of these projects. This has proven to be beneficial over the past several years. The Governor's Office of Planning & Budget estimates Iron County's population to be in the neighborhood of 55,000–56,000 in the next year.
- Local Business Expansion and Retention
  - Development of local incentives matrix facilitated by EDCUtah.
  - Development of Iron County Export Plan per World Trade Center Utah specifications.
  - Creation of Appaloosa 1 Solar Incentive.
  - Initiation of new First Solar Project Area Plan.
  - Completed standardized administration program for all CDA/CRA Project Areas at county level.
  - Complete local BEAR strategy with SUU Business Resource Center.
  - International Economic Development Council training on business expansion and retention in January, 2018.
  - Cedar City Events – Tour of Utah, Haute Tour, Cedar City Half Marathon, etc.
  - Completion of Rural Tourism “How To” Conference in partnership with Cedar City – Brian Head Tourism Bureau and Cedar City Chamber of Commerce.
- Retail Development
  - Completion of a new Iron county retail market study, in conjunction with EDCUtah and Southern Utah University.
  - I Completion of Better City study and intial phase(s) of implementation In the Cedar City Historic Downtown
  - I Completion of NACo Creative Placemaking training and initial planning from this training.
- New Business Development
  - Complete Iron County Megasite Certification - Port 15 or Iron Springs Industrial Park.
  - Complete Economic Development Website Update with focus on: available property

- search, Workforce Development, Transportation, Infrastructure, Incentives, etc.
- Partnership with Washington County to work with First Solar to bring a new 200 MW utility-scale power plant to western Iron County's southern boundary with Washington County
- Initiation of Entry Point broadband program analysis.
- Establishment of relationships with Utah's Silicon Slopes, Provo's One Million Cups program, etc.
- Partnership with Iron County's "Tech Up" group to promote Iron County as a prime location for technology startup companies, using case studies of existing successful companies, and promoting our quality of life, quality of resources and quality of air
- Continued collaboration with the SUU Business Resource Center and the SUU Entrepreneurship Council in the annual Best Business competition and other small business endeavors.
- Complete staff Production Assistant Certification
- Attend Film Ready Training provided by the Utah Film Commission

#### 5-YEAR VISION: 2023

- Describe where you would like your county to be economically five years from now.
  - We plan to see Iron County continue on our current trajectory of healthy, consistent growth throughout the county, with balanced growth within our core business clusters. We anticipate that our aerospace opportunities within the Manufacturing/light industrial cluster will experience growth as the Syberjet program progresses, and as SUU expands into Aerospace Pathways Programs in concert with Southwest Technical College and the Iron County School District.
- What kind of mid-range opportunities exist within your county that can help you achieve your goals?
  - The expansion of our Aerospace Pathways Program and the availability of airport-adjacent property creates numerous job-creation opportunities.
  - Megasite Certification will allow us to pursue large-scale manufacturing opportunities.
  - The potential for new retail development in key areas of the county should see movement within the next five years.
  - Rich Iron Ore deposits in Iron County are a resource still waiting to be tapped. New and increasing demands for iron will eventually play a role in our growing economy.
- What kind of infrastructure and other enhancements is the county considering to help with economic growth?
  - New manufacturing projects will increase use
- of our rail infrastructure.
  - The recently completed 5700 West industrial belt route will make the I-15 exit 51 more appealing for development and will benefit industrial-zoned areas of the county and Cedar City. The future completion of the northern portion of this corridor will be even more significant.
  - Increased utility-scale solar power projects are increasing the size of our local substations as well. It is anticipated that more electrical transmission and distribution infrastructure will continue to increase along with the growth of these projects.
  - The Cedar City Regional Airport is a tremendous resource to Iron County and continued airport improvements will open new opportunities for growth and job creation.
  - Development and expansion of trails systems in Iron County will be very beneficial to the

tourism & recreation aspects of our economy. We anticipate increased visitation to the county as these trails make the county a destination to a broader audience.

Other goals and strategies are found in the Plan.

### **Kane County Strategies**

Kane County's key strategic development priorities are:

- 1** Develop and attract small technology businesses
- 2** Focus on distance work opportunities
- 3** Strengthen our ranching industry
- 4** Attract State Job expansion to Kane County
- 5** Foster locally owned tourism business, tours, flights Local own-local grown
- 6** Attract engineering rich businesses including some manufacturing
- 7** Find balance between wages available and housing affordability

Kane County supportive initiatives are:

- 1** Provide a business-friendly platform where small business can thrive.
  - a. Business Friendly Ordinances
  - b. Lean forward to find the yes
  - c. Training and a network of inspiration
- 2** Provide modern reliable utility infrastructure in the following areas:
  - a. High Speed Internet to every commercial and residential address
  - b. Quality water resources for culinary, irrigation and recreation
    - i. Lake Powell Pipeline
    - ii. The Cove reservoir
  - c. Reliable low-cost power
    - i. Encourage new technology power solutions, turbine, solar
  - d. Transportation
    - i. Maintain and Improve Kane County Highways
    - ii. Better passing lanes at critical areas
    - iii. Better road shoulder on road to Hurricane
    - iv. East Zion public transportation options
    - v. Preserve fuel taxes
- 3** Create a better community:

"Community development, is economic development"

  - a. Healthy recreation, trails, reservoir enhancements, sidewalks
  - b. Cooperative efforts with school, business and SWATC to strengthen STEM education opportunities; coding camps
  - c. Creative Underground maker/coder space
  - d. Expand youth arts and music programs
  - e. Promoting of our youth opportunities, education, sports, 4-H, technology
  - f. Tell our Stories. Highlight and Celebrate our history, Paleontology, Archeology, Historical stories; John Wesley Powell, All Women City Council, Jacob Hamblin, Canyon Peoples Portrait
- 4** Develop and clean, beautiful, friendly, enjoyable community, desirable lifestyle.
  - a. Walkable Community
  - b. Build the Kanab Center 2018
  - c. Beatification and Urban Forestry Efforts
  - d. Support cultural activities; arts, music and events in business districts
  - e. Highway 89 beatification activity

- f. Build connected communities by building, hiking, biking, walking, ATV, equestrian trails.
    - i. Kanab trails and trail heads, maps, way signage,
    - ii. Kanab Trails APP
    - iii. East of Zion Trails Network
    - iv. Long Valley Trial System
    - v. Kane County at large trails
    - vi. Navajo Lake Trails
- 5** Come Home Initiative: Reconnect school alumni to communities;
  - a. Database for connections and communication
  - b. Send out job opportunities listing
- 6** Advocate for natural resource utilization
  - a. Defend livestock grazing rights on public lands
  - b. Push healthy forest legislation and participate in local NEPA processes
  - c. Encourage stewardship timber concept for incenting capital investment
  - d. Work on Arizona Strip Uranium activities as possible
  - e. Assist with Alton Coal development onto Federal leases
- 7** Encourage tourism activities to connect with local business and creating more immersive experiences
  - a. Marketing “stay a little longer” clients in higher income brackets who will be more likely to connect with and spend more money in local business
  - b. Strengthen the flavor of local business for food, tours and local produced products
  - c. Promote locally created products
  - d. Roger Brooks first audience concept, local residents first
  - e. East Zion initiative, trails and transportation system
  - f. Duck Creek initiative, develop branding and improve commercial district
  - g. Promote local activities first and national parks second
  - h. Keep public access open on public lands, RS2477
  - i. Preserve Hunting and Fishing experiences
- 8** Support Technology, engineering and manufacturing businesses
  - a. Strengthen partnership with Utah World Trade Center
  - b. Promote lifestyle benefits: internet speed, employee retention, healthy life, medical services, youth activities and education, weather, clean air and blue skies
  - c. Work closely with GOED to attract businesses to Kane County
- 9** Rural 25K Job initiative
  - a. Encourage basing State jobs in Kane County
  - b. Look for outsource options for growing Wasatch Front businesses
  - c. Create Rural 25K job tool kit with State assistance
    - i. Education and training
    - ii. Ready to go facilities
    - iii. Tax incentives
    - iv. Freelance work connectivity
- 10** Digital Media Projects TV shows, advertisements, movies
  - a. Increase number and frequency of digital media projects
  - b. Work with corporate and media influencers. Attract projects that magnify a positive image of Kane County
  - c. Diversify film incentives to save funds for smaller projects

## **Washington County Strategies**

Washington County is focused on pursuing the future while honoring their roots. They are reaching out to companies and industries that can help diversify the economy while preserving the warmth of the local culture. Lasting success is their goal. Doing it right is their promise.

The following is excerpts from the Washington County Economic Development Plan.

### **One-Year Vision – 2018**

1. The opening of the new Dixie Technical College (DTC) campus on Saint George's 150-acre Tech Ridge. This 30-acre campus is key to our workforce development efforts, especially in reducing intergenerational poverty.
2. The rollout of Dixie State University's Innovation Plaza. Our vision is for this new facility to play a major role in cultivating a skilled workforce while also helping to create jobs, and develop a stronger, more diverse economy.
3. Washington County Economic Development Council, with a diverse representation of key stakeholders from the public and private sectors. Over the next year, we envision this council becoming a resource for supporting the success of existing companies and assisting newly formed companies in further diversifying our economy. We believe the work of this council will leverage relationships and intensify collaboration across agencies to support entrepreneurs at every stage of their development; through education, experiential learning and mentorship.

### **Five-Year Vision – 2023**

In five years, we see Washington County as a tenacious innovation hub for highly skilled, technical people, age 30-50, with children and an active lifestyle. The area will continue to attract retirees, but we also envision Washington County as a destination for young people who are seeking a polytechnic education, specialized graduate degrees, and unique professional opportunities to advance their careers.

### **Ten-Year Vision – 2018**

In ten years, we see Washington County as an established innovation hub and prime living location for highly skilled, technical people, age 30-50, with children and an active lifestyle. We see the Saint George area becoming the top choice for satellite offices among tech companies along the Wasatch Front who seek to utilize our growing talent pipeline, expanding technology presence, fiber internet, and quick escape from traffic, pollution, and distractions. As the features of our community become more widely known, we also expect to see an influx of highly paid, remote working professionals choosing to relocate to the area as more organizations allow their workforce the freedom to work from wherever they choose.

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

The Economic Development Department's mission is to improve the economic well-being of the Paiute Indian Tribe of Utah by implementing programs and strategies in the areas of economic development, small business development, tourism, culture, arts and community development.

The department's goals are to create profit making businesses that create jobs, stimulate economic growth, develop viable opportunities that bring tribal members into the economic mainstream and develop local area as major destination point for quality goods and services.

## **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. Other efforts looking at both rural and metropolitan issues are Coordinated Human Service Transportation Planning and Mobility Management efforts. The planning effort outlines strategies while 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 which now St. George City and Ivins City for commuter and modified routes. Staff has also helped organize van pools in outlying areas to assist 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: Update planning documents/mechanisms on a regular basis for the Iron County RPO**

- Objective 1: Finish the development of the Travel Demand Model for the RPO area.
- Objective 2: Continue to update the list of projects on a regular basis.
- Objective 3: Work toward the development of a regional Active Transportation Plan.

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

- Objective 1: Promote regional vanpool services to connect workers to job sites.
- Objective 2: promote Expansion of routes and the para-transit of existing transit services to connect adjacent communities.
- Objective 3: Promote more accessible and comfortable bus facilities
- Objective 4: 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: Prioritize transportation assets and needs in the region.
- 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.

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 2019-2050 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 2023.
- 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.



Ivins City has transit and Washington City is moving through the process and may have local transit services by May 2020.

- The MPO COMPLETED A REGIONAL TRANSIT STUDY TO GUIDE WASHINGTON COUNTY AND ST. GEORGE CITY TOWARD ESTABLISHING A TRANSIT LINE FROM ST. GEORGE CITY TO SPRINGDALE. (The focus of this line is for service-oriented employees in Springdale and St. George as well as tourists and temporary visitors.)
- 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.
- Funded the purgatory road environmental study to connect the southern parkway to state route 9. The road may eventually open development opportunities for light industrial and manufacturing.

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.
- Plan road, transit, and active transportation projects to reduce and prevent traffic congestion in anticipation of population growth through 2050.
- 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.

## **C. 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.

## **D. 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-fourths 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 a 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 much of the developed 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.

#### **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 appropriate locations.
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.
10. Support entrepreneur efforts throughout the region.

**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.

**Broadband:**

Providing access to broadband throughout the region is still a priority. 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 frustrations 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.
4. Support rural online work initiatives

**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 2020-2025 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.
- Partner with local economic development organizations.

## **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.
- Local universities and colleges.

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 2020–2025 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 2020 – 2025.
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:

Goal 1 – Regional entrepreneurship development through coordination of local and regional economic development partners; Continue to partner with the Atwood Innovation Plaza, the Southern Utah University Entrepreneurial Center, the SBDC at Dixie Technical College, Southwest Technical College, and local and county government agencies.

Performance Measure – Work with the Atwood Innovation Plaza, Southern Utah University Entrepreneurial Center, the SBDC at Dixie Technical College, and Southwest Technical College to determine the number of new businesses and businesses retained.

Goal 2 – Graduates from colleges and universities in the EDD can find employment with local businesses and build careers locally.

Performance Measure – Placement statistics from each of the colleges, technical schools, and universities should be measured to gauge progress.

Goal 3 – Recreation and tourism should continue to be part of the EDD region’s economic strategy. Work with and support recreation and tourism agencies and initiatives to further economic development, sustainability, resiliency, and resistance. Work with tourism agencies to develop outdoor adventure strategic planning.

Performance Measure – Business directly and indirectly related to tourism will continue to rise and will be less vulnerable to off-seasons and times of economic instability.

Goal 4 – Coordinate with economic development partners and support their efforts of economic diversification and industry clustering.

Performance Measure - Support regional economic development mechanism that link economic strengths between communities. Participate in regional and local economic development meetings. Attend pertinent economic development training.

Goal 5 – Facilitate growth in the medical and medical research industries.

Performance Measure – Work with Rocky Mountain Vista Medical School, Intermountain Health, County Hospitals, Rural Health Association of Utah, and other related organizations to gather economic data in the medical field.

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

The State of Utah currently Economic Development Plan is through the Governor’s Office of Economic Development (GOED). The EDD has worked closely with GOED and local economic partners to determine economic goals and strategies through the region.

## APPENDIX

- **Health Care Industry Brief**
- **Leisure Industry Brief**
- **Manufacturing Industry Brief**
- **Transportation Industry Brief**
- **Utilities Industry Brief**

# HEALTH CARE

# INDUSTRY BRIEF



Dec. 2019

Beaver, Garfield, Iron, Kane and Washington Counties



## Largest Employers

1. Intermountain Healthcare
2. Cedar City Hospital
3. Avalon Care Center
4. Sequel Youth Services
5. Cinnamon Hills Youth Crisis Center
6. Diamond Ranch Academy
7. Utah Behavior Services
8. Discovery Ranch South
9. Deseret Industries
10. Beaver Valley Hospital
11. Solacium Sunrise
12. St. George Skilled Nursing Facility
13. Red Rock Healthcare
14. Red Cliffs Healthcare
15. Virgin River Healthcare
16. Cedar Skilled Nursing Facility
17. Red Cliffs Health And Rehab
18. Kane County Hospital
19. St. George Rehabilitation
20. Southwest Center

## Health Care and Social Assistance Employment and Wages

Industry Name (Code)	2018 Employment	2018 Avg. Monthly Wage	Dec. 2017 to Dec. 2018 % Change in Employment
Healthcare and Social Assistance (62)	14,111	\$3,548	4.6%
Ambulatory Health Care Services (621)	4,799	\$3,688	9.1%
Offices of Physicians (6211)	1,521	\$5,590	3.8%
Offices of Dentists (6212)	1,079	\$2,726	4.9%
Other Health Practitioners (6213)	690	\$2,534	21.0%
Outpatient Care Centers (6214)	523	\$3,799	1.9%
Home Health Care Services (6216)	764	\$2,474	21.0%
Other Ambulatory Health Care Services (6219)	206	\$2,788	12.8%
Hospitals (622)	4,112	\$5,062	-3.0%
Nursing and Residential Care Facilities (623)	3,099	\$2,491	4.3%
Social Assistance (624)	2,101	\$1,823	11.1%
Individual and Family Services (6241)	1,408	\$1,967	10.5%
Child Day Care Services (6244)	306	\$1,332	7.2%
<b>Total Area Nonfarm Payroll Jobs</b>	<b>95,792</b>	<b>\$2,952</b>	<b>4.6%</b>
Healthcare and Social Assistance (62) as a Percent of Total	14.7%	120.2%	

Source: Department of Workforce Services

## Health Care and Social Assistance History

Year	Employment	Avg. Monthly Wage	% of Utah Avg. Monthly Wage	Number of Establishments	Payrolls (Millions)	% of Total Area Jobs	% of Total Area Payroll
2011	10,421	\$3,013	91.2%	670	\$376.8	15.1%	18.6%
2012	10,567	\$3,007	88.8%	678	\$381.3	14.8%	18.1%
2013	11,085	\$3,019	88.2%	777	\$401.5	14.9%	18.0%
2014	11,393	\$3,175	90.3%	796	\$434.0	14.6%	18.0%
2015	12,154	\$3,216	88.8%	818	\$469.1	14.9%	18.1%
2016	12,970	\$3,419	92.3%	843	\$532.2	15.0%	18.7%
2017	13,449	\$3,438	90.2%	866	\$554.8	15.0%	18.1%
2018	14,111	\$3,548	89.4%	947	\$600.7	14.7%	17.7%

# HEALTH CARE INDUSTRY BRIEF



## Health Care and Social Assistance Top Occupations Southwest Area

Occupation Code	Occupation Title	Inexperienced Hourly Wage	Median Hourly Wage
29-1141	Registered Nurses	\$25.18	\$30.56
31-1014	Nursing Assistants	\$10.64	\$13.30
39-9021	Personal Care Aides	\$9.81	\$11.15
31-9092	Medical Assistants	\$11.49	\$14.99
31-9091	Dental Assistants	\$12.90	\$15.24
43-6013	Medical Secretaries	\$11.09	\$13.60
39-9011	Childcare Workers	\$8.59	\$11.10
43-4171	Receptionists and Information Clerks	\$8.36	\$10.99
21-1093	Social and Human Service Assistants	\$10.33	\$11.21
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical and Executive	\$9.88	\$14.85
43-9061	Office Clerks, General	\$9.64	\$13.70
29-2021	Dental Hygienists	\$27.82	\$33.01
37-2012	Maids and Housekeeping Cleaners	\$8.75	\$10.23
31-1011	Home Health Aides	\$10.64	\$12.81
11-9111	Medical and Health Services Managers	\$25.00	\$42.75
39-9041	Residential Advisors	\$9.70	\$13.42
29-2061	Licensed Practical and Licensed Vocational Nurses	\$15.16	\$19.09
43-3021	Billing and Posting Clerks	\$11.56	\$13.82
29-1123	Physical Therapists	\$19.21	\$35.38
21-1021	Child, Family, and School Social Workers	\$10.72	\$20.14
43-1011	First-Line Supervisors of Office and Administrative Support Workers	\$13.38	\$19.68
29-1062	Family and General Practitioners	\$66.24	\$91.92

### Total Payroll Jobs

#### December 2018

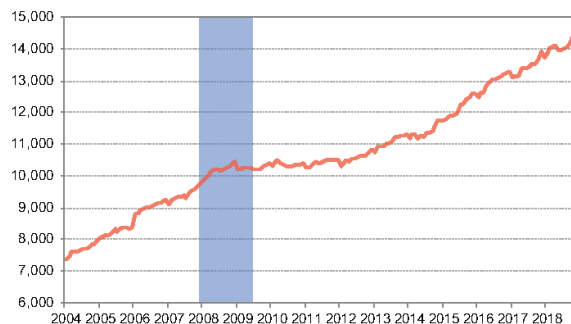
Statewide	1,553,469
Southwest	97,256
% of Statewide	6.3%

### Health Care and Social Assistance Payroll Jobs

#### December 2018

Statewide	175,685
Southwest	14,355
% of Statewide	8.2%

## Health Care and Social Assistance Employment Southwest



Source: Dept. of Workforce Services

Recession Payroll Employment

### Equal Opportunity Employer/Program

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# LEISURE AND HOSPITALITY INDUSTRY BRIEF



Dec. 2019

Beaver, Garfield, Iron, Kane and Washington Counties



## Largest Employers

1. McDonalds
2. Ruby's Inn
3. City Of St George Recreation
4. Wittwer Management
5. National Park Service
6. Red Mountain Resort
7. Tuacahn Center For The Arts
8. City Of Washington Recreation
9. Wendys
10. Brian Head Resort
11. Black Bear Diner
12. Costa Vida
13. Subway
14. Amangiri Resort & Spa
15. Jimmy Johns Of Southern Utah
16. Taco Bell
17. Olive Garden
18. Xanterra Parks & Resorts
19. Safari Hospitality
20. Summit Athletic Club

## Leisure and Hospitality Employment and Wages

Industry Name (Code)	2018 Employment	2018 Avg. Monthly Wage	Dec. 2017 to Dec. 2018 % Change in Employment
<b>Leisure and Hospitality (71,72)</b>	<b>15,915</b>	<b>\$1,553</b>	<b>5.0%</b>
<b>Arts, Entertainment, and Recreation (71)</b>	<b>2,729</b>	<b>\$1,839</b>	<b>-2.9%</b>
Performing Arts, Spectator Sports and Related Industries (711)	381	\$2,286	0.3%
Museums, Historical Sites, and Similar Institutions (712)	442	\$3,723	1.3%
Amusement, Gambling, and Recreation Industries (713)	1,906	\$1,313	-4.2%
<b>Accommodation and Food Services (72)</b>	<b>13,187</b>	<b>\$1,494</b>	<b>6.9%</b>
Accommodation (721)	4,177	\$1,882	10.0%
Food Services and Drinking Places (722)	9,010	\$1,314	5.6%
<b>Total Area Nonfarm Payroll Jobs</b>	<b>95,792</b>	<b>\$2,952</b>	<b>4.6%</b>
Leisure and Hospitality (71,72) as a Percent of Total	16.6%	52.6%	

Source: Department of Workforce Services

## Leisure and Hospitality History

Year	Employment	Avg. Monthly Wage	% of Utah Avg. Monthly Wage	Number of Establishments	Payrolls (Millions)	% of Total Area Jobs	% of Total Area Payroll
2011	11,656	\$1,324	40.1%	656	\$185.1	16.9%	9.1%
2012	12,183	\$1,357	40.1%	674	\$198.4	17.1%	9.4%
2013	12,859	\$1,354	39.6%	701	\$209.0	17.3%	9.4%
2014	13,610	\$1,378	39.2%	725	\$225.0	17.4%	9.3%
2015	14,018	\$1,442	39.8%	738	\$242.5	17.2%	9.4%
2016	14,403	\$1,474	39.8%	755	\$254.7	16.7%	8.9%
2017	15,022	\$1,516	39.8%	787	\$273.3	16.7%	8.9%
2018	15,915	\$1,553	39.1%	824	\$296.6	16.6%	8.7%

## LEISURE AND HOSPITALITY INDUSTRY BRIEF



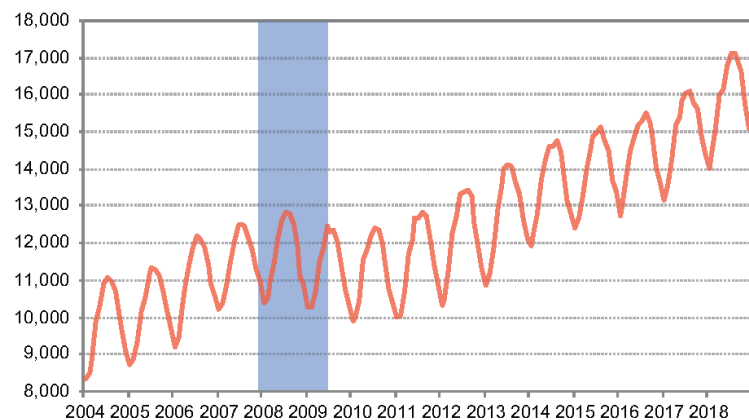
### Leisure and Hospitality Top Occupations Southwest Area

Occupation Code	Occupation Title	Inexperienced Hourly Wage	Median Hourly Wage
35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	\$8.41	\$9.65
35-3031	Waiters and Waitresses	\$8.38	\$9.64
35-2014	Cooks, Restaurant	\$9.52	\$11.25
37-2012	Maids and Housekeeping Cleaners	\$8.75	\$10.23
35-1012	First-Line Supervisors of Food Preparation and Serving Workers	\$10.61	\$14.16
35-2021	Food Preparation Workers	\$8.54	\$9.41
43-4081	Hotel, Motel, and Resort Desk Clerks	\$9.47	\$10.67
35-9021	Dishwashers	\$8.26	\$8.72
35-9031	Hosts and Hostesses, Restaurant, Lounge and Coffee Shop	\$8.25	\$8.75
41-2011	Cashiers	\$8.45	\$9.42
35-2011	Cooks, Fast Food	\$8.13	\$8.65
11-1021	General and Operations Managers	\$12.64	\$24.36
35-9011	Dining Room and Cafeteria Attendants and Bartender Helpers	\$8.62	\$9.18
35-3022	Counter Attendants, Cafeteria, Food Concession and Coffee Shop	\$8.63	\$8.87
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	\$8.60	\$12.18
11-9051	Food Service Managers	\$17.32	\$23.31

Total Payroll Jobs	
December 2018	
Statewide	1,553,469
Southwest	97,256
% of Statewide	6.3%

Leisure and Hospitality Payroll Jobs	
December 2018	
Statewide	156,964
Southwest	15,113
% of Statewide	9.6%

### Leisure and Hospitality Employment Southwest



Source: Dept. of Workforce Services

Recession

Payroll Employment

#### Equal Opportunity Employer/Program

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# MANUFACTURING INDUSTRY BRIEF



Dec. 2019

Beaver, Garfield, Iron, Kane and Washington Counties



## Largest Employers

1. Genpak
2. Litehouse
3. Ram Manufacturing Company
4. Wilson Electronics
5. Deseret Laboratories
6. AMPAC Corporation
7. Metalcraft Technologies
8. Byway Corporation
9. Currentwrx
10. Smead Manufacturing Company
11. Reid-Ashman Manufacturing
12. St. George Truss Company
13. Western Quality Foods
14. Mueller Copper Tube West
15. Charlotte Pipe and Foundry
16. Innovative Yacht Builders
17. Stampin' Up
18. S & S Steel Fabrication
19. Riverwoods Mill
20. Innova Global

## Manufacturing Employment and Wages

Industry Name (Code)	2018 Employment	2018 Avg. Monthly Wage	Dec. 2017 to Dec. 2018 % Change in Employment
<b>Manufacturing (31-33)</b>	<b>5,497</b>	<b>\$3,576</b>	<b>-1.5%</b>
Food Manufacturing (311)	542	\$2,986	13.4%
Beverage and Tobacco Product Manufacturing (312)	35	\$2,103	33.3%
Textile Mills (313)	106	\$2,721	10.0%
Wood Product Manufacturing (321)	236	\$2,725	-14.4%
Printing and Related Support Activities (323)	93	\$2,695	6.5%
Chemical Manufacturing (325)	404	\$4,677	0.2%
Plastics and Rubber Products Manufacturing (326)	673	\$3,646	3.7%
Nonmetallic Mineral Product Manufacturing (327)	292	\$3,663	-51.6%
Fabricated Metal Product Manufacturing (332)	860	\$3,608	4.4%
Machinery Manufacturing (333)	139	\$3,907	11.1%
Computer and Electronic Product Manufacturing (334)	414	\$5,154	7.8%
Transportation Equipment Manufacturing (336)	386	\$3,646	23.3%
Furniture and Related Product Manufacturing (337)	540	\$2,855	2.9%
Miscellaneous Manufacturing (339)	425	\$3,352	-7.6%
<b>Total Area Nonfarm Payroll Jobs</b>	<b>95,792</b>	<b>\$2,952</b>	<b>5.7%</b>
Manufacturing (31-33) as a Percent of Total	5.7%	121.1%	

Source: Utah Department of Workforce Services.

## Manufacturing History

Year	Employment	Avg. Monthly Wage	% of Utah Avg. Monthly Wage	Number of Establishments	Payrolls (Millions)	% of Total Area Jobs	% of Total Area Payroll
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%
2014	4,394	\$3,225	91.8%	283	\$170.1	5.6%	7.1%
2015	4,826	\$3,212	88.7%	300	\$186.0	5.9%	7.2%
2016	5,022	\$3,279	88.5%	308	\$197.6	5.8%	6.9%
2017	5,467	\$3,408	89.4%	333	\$223.6	6.1%	7.3%
2018	5,497	\$3,576	90.1%	339	\$235.9	5.7%	7.0%



# MANUFACTURING INDUSTRY BRIEF



## Manufacturing Top Occupations Southwest Area

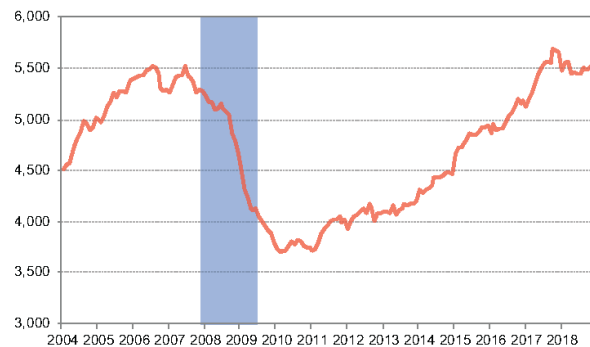
Occupation Code	Occupation Title	Inexperienced Hourly Wage	Median Hourly Wage
51-1011	First-Line Supervisors of Production and Operating Workers	\$16.80	\$23.34
51-9061	Inspectors, Testers, Sorters, Samplers and Weighers	\$12.70	\$16.60
51-4121	Welders, Cutters, Solderers and Brazers	\$15.40	\$22.16
51-9111	Packaging and Filling Machine Operators and Tenders	\$12.45	\$18.21
11-1021	General and Operations Managers	\$12.64	\$24.36
51-4041	Machinists	\$15.45	\$20.39
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	\$9.11	\$12.32
41-4012	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	\$14.04	\$21.99
43-5071	Shipping, Receiving, and Traffic Clerks	\$12.80	\$16.81
51-7011	Cabinetmakers and Bench Carpenters	\$10.59	\$13.41
53-7064	Packers and Packagers, Hand	\$8.96	\$14.59
43-4051	Customer Service Representatives	\$9.37	\$13.55
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical and Executive	\$9.88	\$14.85
49-9071	Maintenance and Repair Workers, General	\$10.71	\$17.13
51-9198	Helpers—Production Workers	\$8.47	\$10.99
43-5061	Production, Planning and Expediting Clerks	\$12.81	\$20.19
17-2141	Mechanical Engineers*	\$24.99	\$28.88
43-9061	Office Clerks, General	\$9.64	\$13.70
51-4072	Molding, Coremaking and Casting Machine Setters, Operators and Tenders, Metal and Plastic	\$12.70	\$15.38
11-3051	Industrial Production Managers	\$17.98	\$30.08
49-9041	Industrial Machinery Mechanics	\$17.60	\$23.65
51-4011	Computer-Controlled Machine Tool Operators, Metal and Plastic	\$10.79	\$11.41

\* Statewide wages

Total Payroll Jobs	
December 2018	
Statewide	1,553,469
Southwest	97,256
% of Statewide	6.3%

Manufacturing Payroll Jobs	
December 2018	
Statewide	135,776
Southwest	5,568
% of Statewide	4.1%

## Manufacturing Employment Southwest



Source: Dept. of Workforce Services

Recession

Payroll Employment

### Equal Opportunity Employer/Program

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# TRANSPORTATION INDUSTRY BRIEF



Beaver, Garfield, Iron, Kane and Washington Counties



## Largest Employers

1. Wal-Mart Distribution Center
2. Skywest Airlines
3. Andrus Transportation Services
4. Family Dollar Distribution Center
5. U.S. Postal Service
6. American Logistics Company
7. Washington School District
8. United Parcel Service
9. Parke Cox Trucking Company
10. St George Executive Shuttle
11. Gurney Trucking
12. Union Pacific Railroad
13. Boulevard Furniture Warehouse
14. Parks Transportation
15. Iron County School District
16. Rhine Construction
17. Fedex
18. St George Express
19. Clark Bradshaw Trucking
20. T. Rex Couriers

## Transportation and Warehousing Employment and Wages

Industry Name (Code)	2018 Employment	2018 Avg. Monthly Wage	Dec. 2017 to Dec. 2018 % Change in Employment
<b>Transportation &amp; Warehousing (48, 49)</b>	<b>5,189</b>	<b>\$4,041</b>	<b>3.9%</b>
Truck Transportation (484)	1,409	\$3,559	-5.8%
General Freight Trucking (4841)	1,149	\$3,636	-10.1%
Specialized Freight Trucking (4842)	260	\$3,220	17.8%
Transit and Ground Passenger Transportation (485)	705	\$2,164	46.9%
Support Activities for Transportation (488)	170	\$3,494	12.4%
Couriers and Messengers (492)	330	\$3,860	-9.7%
<b>Total Area Nonfarm Payroll Jobs</b>	<b>95,792</b>	<b>\$2,952</b>	<b>5.7%</b>
Transportation & Warehousing (48,49) as a Percent of Total	5.4%	136.9%	

Source: Department of Workforce Services

## Transportation and Warehousing History

Year	Employment	Avg. Monthly Wage	% of Utah Avg. Monthly Wage	Number of Establishments	Payrolls (Millions)	% of Total Area Jobs	% of Total Area Payroll
2011	3,742	\$3,309	100.1%	251	\$148.6	5.4%	7.3%
2012	3,748	\$3,316	97.9%	267	\$149.1	5.2%	7.1%
2013	3,740	\$3,420	100.0%	226	\$153.5	5.0%	6.9%
2014	4,182	\$3,410	97.0%	259	\$171.1	5.4%	7.1%
2015	4,363	\$3,552	98.1%	265	\$186.0	5.4%	7.2%
2016	4,692	\$3,505	94.6%	279	\$197.3	5.4%	6.9%
2017	4,937	\$3,699	97.1%	272	\$219.2	5.5%	7.2%
2018	5,189	\$4,041	101.8%	274	\$251.6	5.4%	7.4%

# TRANSPORTATION INDUSTRY BRIEF



## Transportation and Warehousing Top Occupations Southwest Area

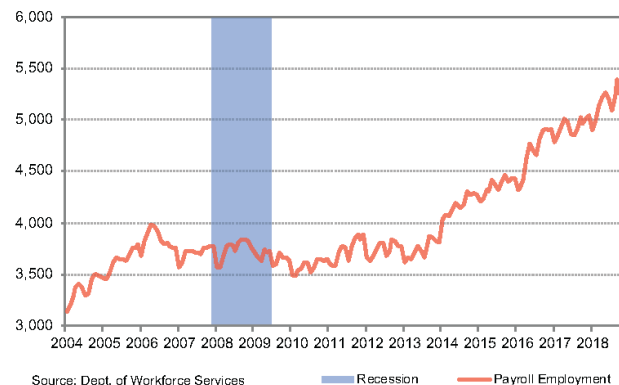
Occupation Code	Occupation Title	Inexperienced Hourly Wage	Median Hourly Wage
53-3032	Heavy and Tractor-Trailer Truck Drivers	\$12.70	\$20.96
53-7062	Laborers and Freight, Stock and Material Movers, Hand	\$9.11	\$12.32
53-3033	Light Truck or Delivery Services Drivers	\$9.62	\$18.69
43-5071	Shipping, Receiving, and Traffic Clerks	\$12.80	\$16.81
43-4051	Customer Service Representatives	\$9.37	\$13.55
49-3031	Bus and Truck Mechanics and Diesel Engine Specialists	\$16.62	\$19.86
53-7051	Industrial Truck and Tractor Operators	\$13.46	\$16.45
11-1021	General and Operations Managers	\$12.64	\$24.36
43-5081	Stock Clerks and Order Fillers	\$8.25	\$9.56
43-5032	Dispatchers, Except Police, Fire and Ambulance	\$12.79	\$17.12
43-1011	First-Line Supervisors of Office and Administrative Support Workers	\$13.38	\$19.68
41-3099	Sales Representatives, Services, All Other	\$19.06	\$35.88
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical and Executive	\$9.88	\$14.85
43-9061	Office Clerks, General	\$9.64	\$13.70
11-3071	Transportation, Storage and Distribution Managers	\$28.43	\$41.15
43-5061	Production, Planning and Expediting Clerks	\$12.81	\$20.19
43-3031	Bookkeeping, Accounting and Auditing Clerks	\$11.16	\$15.55
53-3022	Bus Drivers, School or Special Client	\$11.72	\$19.12
43-4151	Order Clerks	\$9.94	\$12.56

Source: Department of Workforce Services

Total Payroll Jobs	
December 2018	
Statewide	1,553,469
Southwest	97,256
% of Statewide	6.3%

Transportation and Warehousing Payroll Jobs	
December 2018	
Statewide	77,450
Southwest	5,235
% of Statewide	6.8%

## Transportation and Warehousing Employment Southwest



### Equal Opportunity Employer/Program

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

# UTILITIES

# INDUSTRY BRIEF



Dec. 2019

Beaver, Garfield, Iron, Kane and Washington Counties



## Utilities Employment and Wages

Industry Name (Code)	2018 Employment	2018 Avg. Monthly Wage	Dec. 2017 to Dec. 2018 % Change in Employment
Utilities (22)	426	\$6,068	4.1%
Electric Power Generation, Transmission and Distribution (2211)	233	\$7,509	0.4%
Water, Sewage and Other Systems (2213)	140	\$3,487	12.5%
<b>Total Area Nonfarm Payroll Jobs</b>	<b>95,792</b>	<b>\$2,952</b>	<b>5.7%</b>
Utilities (22) as a Percent of Total	0.4%	205.6%	

Source: Department of Workforce Services

## Largest Employers

1. PacifiCorp
2. Dixie Escalante
3. City of St George
4. Garkane Energy Cooperative
5. Questar Gas Company
6. Ash Creek Special Service District
7. Washington City
8. Sunrise Ag

## Utilities History

Year	Employment	Avg. Monthly Wage	% of Utah Avg. Monthly Wage	Number of Establishments	Payrolls (Millions)	% of Total Area Jobs	% of Total Area Payroll
2011	389	\$5,365	162.3%	40	\$25.0	0.6%	1.2%
2012	396	\$5,231	154.4%	41	\$24.9	0.6%	1.2%
2013	413	\$5,339	156.0%	43	\$26.4	0.6%	1.2%
2014	412	\$5,600	159.3%	45	\$27.7	0.5%	1.2%
2015	412	\$5,939	164.0%	46	\$29.4	0.5%	1.1%
2016	409	\$6,057	163.5%	46	\$29.7	0.5%	1.0%
2017	411	\$6,056	158.9%	44	\$29.8	0.5%	1.0%
2018	426	\$6,068	152.9%	43	\$31.0	0.4%	0.9%

## UTILITIES

# INDUSTRY BRIEF



### Utilities Top Occupations Southwest Area

Occupation Code	Occupation Title	Inexperienced Hourly Wage	Median Hourly Wage
49-9012	Control and Valve Installers and Repairers, Except Mechanical Door*	\$23.02	\$28.50
11-1021	General and Operations Managers	\$12.64	\$24.36
49-1011	First-Line Supervisors of Mechanics, Installers and Repairers	\$22.99	\$31.74
51-8031	Water and Wastewater Treatment Plant and System Operators	\$10.05	\$18.94
13-1071	Human Resources Specialists	\$15.06	\$20.87
43-4051	Customer Service Representatives	\$9.37	\$13.55
13-1051	Cost Estimators	\$18.37	\$28.51
17-2141	Mechanical Engineers*	\$23.02	\$41.92
47-2111	Electricians	\$14.79	\$18.06
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical and Executive	\$9.88	\$14.85
51-1011	First-Line Supervisors of Production and Operating Workers	\$16.80	\$23.34
43-1011	First-Line Supervisors of Office and Administrative Support Workers	\$13.38	\$19.68
13-1111	Management Analysts	\$20.51	\$31.63
11-3071	Transportation, Storage, and Distribution Managers	\$28.43	\$41.15
53-7062	Laborers and Freight, Stock and Material Movers, Hand	\$9.11	\$12.32
13-2011	Accountants and Auditors	\$15.39	\$26.05
47-2152	Plumbers, Pipefitters and Steamfitters	\$14.29	\$17.89
49-9071	Maintenance and Repair Workers, General	\$10.71	\$17.13
43-9061	Office Clerks, General	\$9.64	\$13.70
15-1121	Computer Systems Analysts	\$27.27	\$41.40

\* Statewide wages

#### Total Payroll Jobs

##### December 2018

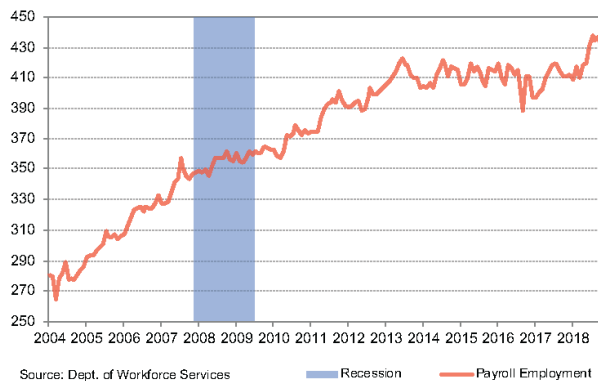
Statewide	1,553,469
Southwest	97,256
% of Statewide	6.3%

#### Utilities Payroll Jobs

##### December 2018

Statewide	6,257
Southwest	429
% of Statewide	6.9%

### Utilities Employment Southwest



#### Equal Opportunity Employer/Program

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