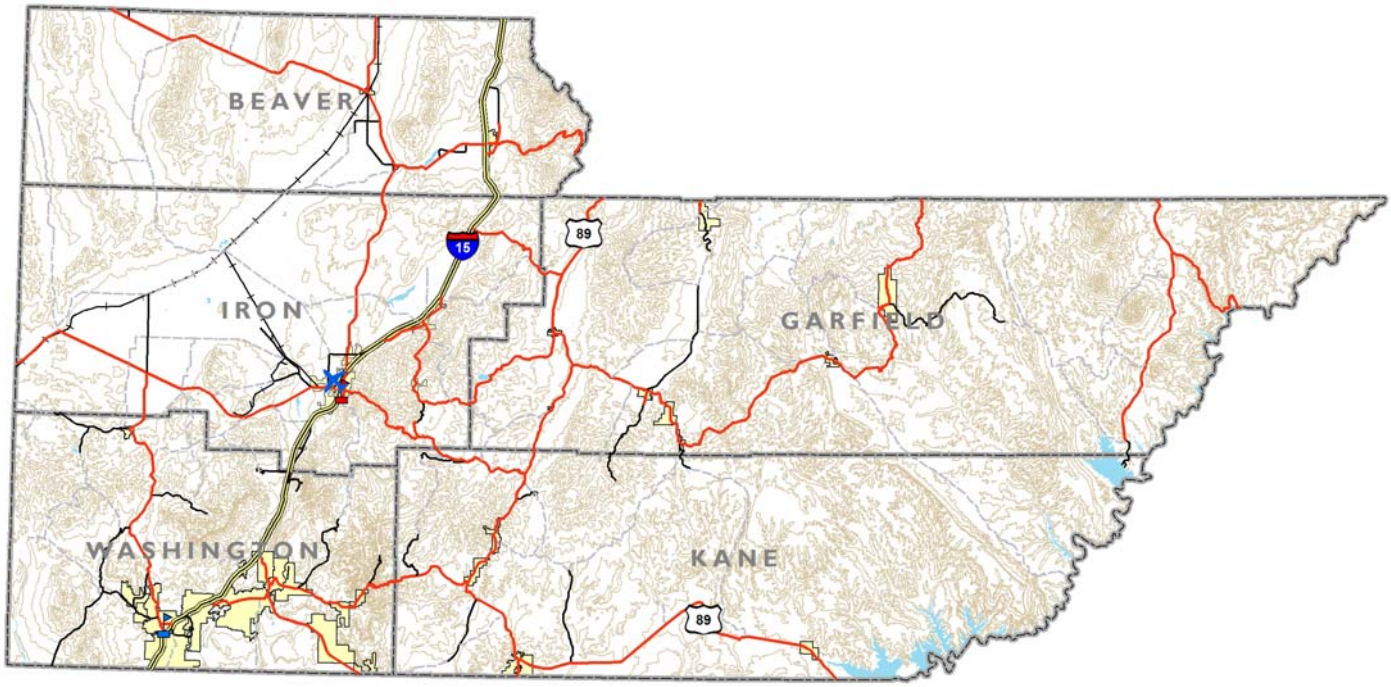
An Analysis of Long-Term Economic Growth in Southwestern Utah: Past and Future Conditions

Iron County Profile



Prepared for
The Southwestern Utah Economic Consortium

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Current Demographic and Economic Baseline of Iron County

Population		
Population (2007)		44,813
Average Annual Growth Rate, 1970–2007		3.6%
Net In-Migration, 1970–2007		16,952
Median Age (2006)		25.6
Households (2007)		14,302
Median Household Income (1999)		$33,114
Employment		
Total Farm, Nonfarm and Proprietor Employment (2005)		21,955
Average Annual Growth Rate, 1970–2005		2.2%
Farm Employment as a Share of Total Employment		2.6%
Nonagricultural Employment (2006)		16,802
Average Annual Growth Rate, 1970–2006		4.2%
Employer Firms (2006)		1,520
Major Nonagricultural Employment Sectors (2006)	Number	Share
Government	4,198	24.9%
Retail Trade	2,255	13.4%
Construction	1,839	11.0%
Manufacturing	1,781	10.6%
Accommodation and Food Services	1,563	9.2%
Retail Sales		
Taxable 2006 Retail Sales (millions)		$418.2
Average Annual Inflation-Adjusted Growth Rate, 1980–2006		4.4%
Major Retail Categories (millions)	Amount	Share
General Merchandise	$112.4	26.9%
Building and Garden	$83.5	20.0%
Motor Vehicles	$67.4	16.1%
Per Capita Retail Sales (2006)		$9,631
Wages and Income		
Total Nonagricultural Wages (2006, millions)		$414.4
Average Annual Inflation-Adjusted Growth Rate, 1970–2006		3.9%
Average Monthly Wage (2006)		$2,055
Total Personal Income (2005, millions)		$799.1
Average Annual Inflation-Adjusted Growth Rate, 1970–2005		4.4%
Housing, New Construction, and Real Estate		
	Number	Share
Total Housing Units (2007)	18,127	
Total Occupied Units (share of total housing units)	15,387	84.9%
Owner-Occupied (share of total occupied)	11,450	74.4%
Renter-Occupied (share of total occupied)	3,396	22.1%
Recreation or Seasonal Units (share of total housing units)	2,099	11.6%
Median Sales Price of Existing Single-Family Homes (2006)		$150,750
New Permit-Authorized Dwelling Units (2007)		656
Value of Residential Construction (2007, millions)		$858.5
Value of Nonresidential Construction (2007, millions)		$30.7
Land Ownership (2007)	Acres	Share
Privately Owned	754,031	35.7%
Federally Owned	1,215,177	57.5%
State Owned	141,184	6.7%
Total Area	2,113,335	100%
Southern Utah University		
Total Annualized FTE Enrollment (2006–07)		6,937
Total Degrees Awarded		1,250
Tax Revenue		
Property Tax Receipts (2006, millions)		$31.2
Sales Taxes Disbursed (2006, millions)		$6.0

Note: All dollar figures are in current dollars.

Sources: Utah Population Estimates Committee; U.S. Census Bureau; Utah Governor's Office of Planning and Budget; Bureau of Economic and Business Research, University of Utah; Utah Department of Workforce Services; U.S. Bureau of Economic Analysis; USDA 2002 Census of Agriculture; Utah State Tax Commission; Utah Automated Geographic Reference Center; Utah System of Higher Education..

Executive Summary

The population of Iron County now totals 44,813, increasing at an annual rate of 3.6 percent from its 1970 population of 12,300. Most of the growth in the county occurred after 1990 (23,903 additional persons since then), with net in-migration accounting for almost two-thirds of the increase.

Prior to 1970, the populations of Iron County and Washington County were within 1,000 of each other. Since 1970, Iron County's role in the region has declined significantly. Its current population is about one-third that of Washington County, and its share of regional employment is 22 percent—down from about 35 percent in 1970.

In 2000, nearly 3,000 minorities lived in Iron County, or about 9 percent of the county's population—the highest percentage in the region. About half of the minority population is Hispanic, and one-quarter American Indian.

Iron County is the second largest employment center in the southwest region, with about one-quarter of all nonfarm jobs in the region. Nonfarm employment in Iron County totaled 16,802 in 2006, up from 3,830 in 1970. This represents an average annual rate of increase of 4.2 percent, the second-fastest-growing county in the region. Since 1970, employment growth in Iron County contributed almost 20 percent of regional employment growth.

Government has been, and continues to be, a major employer in Iron County. In 1970, it provided more than one-third of all nonfarm jobs; trade and services were the other major sectors with 23.7 percent and 12.8 percent, respectively. By 2006, government's share of employment had declined, but it still employed 25 percent of all nonfarm workers *and* accounted for 22 percent of employment growth from 1970 to 2006. All services combined represented almost 30 percent of nonfarm jobs. Employment in construction grew significantly and by 2006 accounted for 11 percent of all nonfarm employment.

In 2000, Iron County had net out-commuting of 357 workers. Most out-commuting (67 percent) was to other counties within the region, primarily Washington County. Only 12 percent of out-commuters worked outside the state.

Total real wages (adjusted for inflation) have quadrupled in Iron County since 1970, reaching $414.4 million in 2006. In spite of this growth, the county's share of total wages in the region declined over the period from 42 percent to about 21 percent.

In 2006, the average monthly wage in Iron County was $2,055, an increase of 7.5 percent from the previous year. However, even with this gain, the county's average monthly wage measures 92 percent of the regional average. In comparison, in 1970, the average monthly wage in Iron County was 5 percent higher than the regional average. A large student workforce, combined with the current industry mix explain the county's below-average wages in 2006.

By far, financial activities (banks, real estate brokers, etc.) pay the highest monthly wage ($3,046) followed by manufacturing ($2,554). In contrast, the average monthly wage in the leisure and hospitality sector was $883.

Iron County has the highest proportion of privately owned land among the five counties in the southwest region. More than one-third of the county is in private ownership. The federal government owns more than half and state lands make up about 7 percent. Iron is one of two counties with Paiute tribal lands.

Retail sales growth in Iron County has been impressive, increasing at an inflation-adjusted rate of 4.4 percent annually, from $136.9 million in 1980 to $418.2 million in 2006. Iron's per capita sales were $9,631—more than double those in Beaver and Garfield, and $1,000 more than Kane County's. Almost half of all retail dollars in the county are spent at general merchandise and building and garden stores.

In 2007, Iron County had a housing inventory of 18,127. Just over one in ten housing units are for seasonal or recreational use, the lowest share among the five southwest counties. A total of 15,387 units are occupied, a quarter of which are rental units—the highest percentage in the region. This is a reflection of the off-campus housing needs of students at Southern Utah University. One out of four housing units in the county has been built since 2000.

Residential construction has been exceptionally strong in the county over the past four years. Since 2004, building permits have been issued for 2,961 residential units in Iron County. New residential construction in Cedar City has accounted for most of these units.

Since 1975, Iron County has issued building permits for $764.4 million (in 2007 dollars) of nonresidential construction. The peak year was 1992, with $93.8 million, which included the American Pacific facility to manufacture automobile airbag parts. The second peak year was 2000, with the construction of the $26 million SUU Physical Education Building and a Wal-Mart ($9 million). Over the past two years, nonresidential construction has been exceptionally strong, totaling $27.2 million in 2006 and $30.7 million in 2007.

Between 2000 and 2020, Iron County's population is expected to double, reaching 68,315 by the end of the period. All three major age groups (school-age, working-age, and retirement-age) are projected to grow by more than 90 percent; however, the retirement population (65+) becomes more prevalent over time. This age group is projected to grow 120 percent, increasing as a share of population from 8.6 to 9.4 percent.

The school-age population (0–17) is expected to increase 140 percent, but sees no change in its share of the county's population. Although the working-age population is projected to increase by about 96 percent, its share of the county's population declines from 60.3 percent in 2000 to 58.8 percent in 2020.

All employment sectors in Iron County are expected to grow except natural resources and mining, which will lose about 94 jobs. Government adds the most jobs, accounting for 21 percent of job growth from 2005 to 2020. Education and health services will post the largest percentage increase, growing by 166.2 percent over the period, and adding 2,272 new jobs. The slowest-growing sectors will be manufacturing (up 42 percent) and information (up 56 percent).

Southern Utah University (SUU) is the largest of the two institutions of higher education in the southwest region, and the largest employer in Iron County. SUU offers graduate, baccalaureate, and associate degrees. It also offers certificates in five fields of study.

Enrollment at SUU has more than tripled over the last 25 years, growing from 1,921 annualized full-time equivalents in the 1981–82 academic year to 6,937 in 2006–07. Enrollment growth has been strong, dipping just three times since 1982. The largest drops occurred in 2002–03, with an enrollment decline of 223 over the previous year, and in 2003–04, with a further decline of 152. By 2004–05, enrollment had grown to 6,202, exceeding its previous high mark of 6,134.

The number of degrees awarded has also increased significantly. Since the 1981–82 academic year, the total number of degrees awarded at SUU grew from 301 to 1,250 in 2007—an increase of 315 percent. Bachelor's degrees accounted for almost 70 percent of all degrees awarded in 2006–07.

SUU has seen very strong growth in its master's degree programs. It currently offers master's degrees in eight fields, but most are awarded in education and business. Since the first ones were granted in 1985–86, SUU has awarded a total of 1,566 masters degrees; since 1989–90, 1,004 have been awarded in education and 527 in business and marketing. The academic year 2006–07 was a peak year, with a total of 204 master's degrees awarded.

Enrollment growth is projected to slow from its fast pace, with enrollment increasing by little more than one-third by the 2020–21 academic year. However, given the demographic and economic growth projections for the southwest region, enrollments may be much higher than forecast.

Demographics

Population Levels and Changes

The population of Iron County, which remained within 1,000 of Washington County from 1900 through 1970, has grown to an estimated 44,813 in 2007 (Exhibit 1). This is slightly less than a third the size of Washington County, but over two-and-a-half times the combined population of the remaining three southwestern Utah counties. Prior to 1990, the population growth of Iron County resembled that of small rural counties throughout the state. Although natural increase was consistently positive, net migration cycled between in- and out-migration depending upon labor market conditions. On a cumulative basis, the county experienced net out-migration from 1940 to 1990.

Since 1990, Iron County population growth has accelerated significantly, averaging 4.5 percent annually. Population more than doubled, from 20,910 in 1990 to 44,813 in 2007, with net in-migration accounting for 15,185 or 63.5 percent of the increase. Considering components of population change and annual growth rates, it appears that the population growth dynamics in Iron County since 1990 have come to more closely resemble those of Washington County.

Of those who lived in Iron County in 2000, 35.3 percent are estimated to have moved to the county from elsewhere since 1995 (Table 1). These are divided nearly equally between out-of-state and in-state (but out-of-county) origins. Utah, California, Nevada, and Arizona were the top three states of origin, with Salt Lake, Utah, and Washington counties being the top three sending counties within the state. About 1.5 percent of the population of Iron County in 2000 reported living outside the U.S. in 1995. Persons who left Iron County between 1995 and 2000 left for elsewhere in Utah, California, Nevada, Arizona, Missouri, and Oregon (the last three states had nearly equal numbers of out-migrants). All of these had positive net in-migration to Iron except the last two. (Oregon and Missouri received sizable net out-migration from Iron County.) Washington, Salt Lake, and Utah counties were the top three in-state destination counties for those leaving Iron County from 1995 to 2000. The top three counties with net in-migration to Iron County were Salt Lake, Utah, and Davis counties. Washington County was the only one with significant net out-migration from Iron County. According to the Census 2000 data, Iron County experienced positive net in-migration from 1995 to 2000 on both an in-state and out-of-state basis.

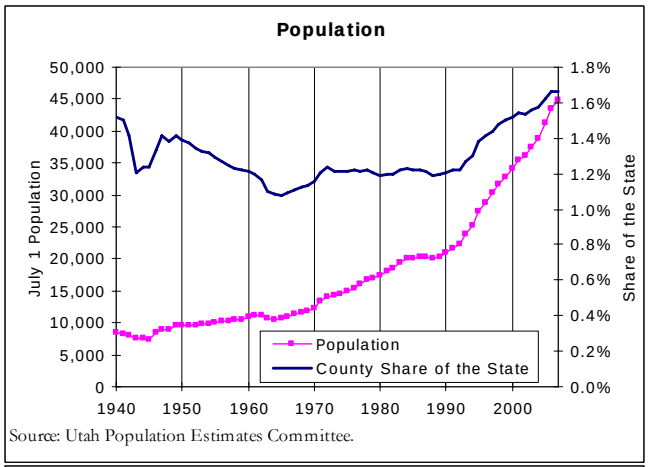
Table 1
Iron County Migration, 1995–2000

State-to-County		In-State-to-County	
In-Flows		**In-Flows**	
Total	**10,805**	**Total**	**5,491**
Utah	5,491	Salt Lake	1,193
California	1,308	Utah	901
Nevada	1,267	Washington	819
Arizona	509	Davis	317
Idaho	319	Millard	259
Out-Flows		**Out-Flows**	
Total	**7,736**	**Total**	**3,714**
Utah	3,714	Washington	964
California	1,011	Salt Lake	835
Nevada	831	Utah	600
Arizona	241	Cache	153
Missouri	229	Beaver	115
Net		**Net**	
Total	**3,069**	**Total**	**1,777**
Utah	1,777	Salt Lake	358
Nevada	436	Utah	301
California	297	Davis	228
Arizona	268	Millard	162
Idaho	160	Sevier	141

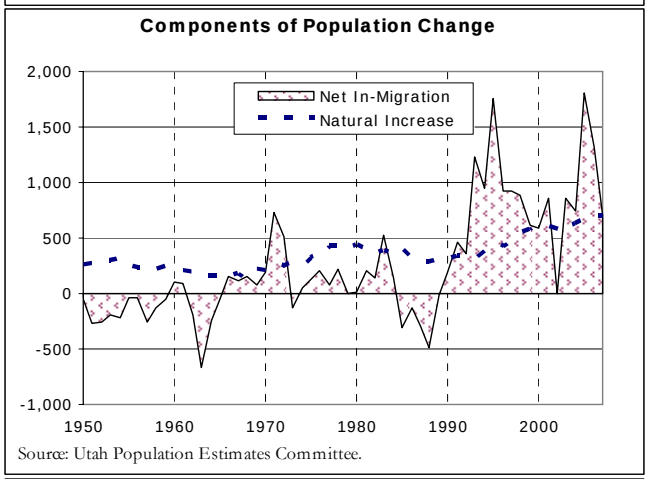
Source: Census 2000, County-to-County Migration File.

Exhibit 1
Iron County Population Estimates and Components of Population Change, 1940–2007

	Population	Fiscal Year Births	Fiscal Year Deaths	Natural Increase	Net In-Migration
1940	8,400	223	75	148	0
1941	8,300	230	57	173	–273
1942	8,100	214	48	166	–366
1943	7,700	233	64	169	–569
1944	7,500	239	66	173	–373
1945	7,300	212	50	162	–362
1946	8,500	235	65	170	1,030
1947	9,000	313	68	245	255
1948	9,000	304	65	239	–239
1949	9,500	334	64	270	230
1950	9,700	331	78	253	–53
1951	9,700	337	64	273	–273
1952	9,700	338	80	258	–258
1953	9,800	347	57	290	–190
1954	9,900	383	65	318	–218
1955	10,100	308	64	244	–44
1956	10,300	296	61	235	–35
1957	10,300	306	56	250	–250
1958	10,400	294	72	222	–122
1959	10,600	316	70	246	–46
1960	10,900	273	71	202	98
1961	11,200	281	74	207	93
1962	11,200	261	68	193	–193
1963	10,700	237	72	165	–665
1964	10,600	211	63	148	–248
1965	10,700	233	80	153	–53
1966	11,000	236	86	150	150
1967	11,300	268	83	185	115
1968	11,600	241	98	143	157
1969	11,900	306	82	224	76
1970	12,300	287	76	211	189
1971	13,300	351	80	271	729
1972	14,050	332	94	238	512
1973	14,200	386	108	278	–128
1974	14,500	336	81	255	45
1975	14,950	403	87	316	134
1976	15,500	429	79	350	200
1977	16,000	522	101	421	79
1978	16,650	502	76	426	224
1979	17,050	518	117	401	–1
1980	17,500	528	93	435	15
1981	18,100	508	109	399	201
1982	18,600	460	99	361	139
1983	19,500	475	95	380	520
1984	20,000	437	80	357	143
1985	20,100	498	90	408	–308
1986	20,300	435	103	332	–132
1987	20,300	412	116	296	–296
1988	20,100	403	115	288	–488
1989	20,400	418	108	310	–10
1990	20,910	409	96	313	197
1991	21,715	459	120	339	466
1992	22,410	444	108	336	359
1993	23,965	451	130	321	1,234
1994	25,296	527	142	385	946
1995	27,506	582	134	448	1,762
1996	28,858	578	150	428	924
1997	30,254	621	146	475	921
1998	31,687	726	183	543	890
1999	32,879	751	172	579	613
2000	34,079	771	155	616	584
2001	35,541	767	161	606	856
2002	36,122	749	171	578	3
2003	37,559	773	196	577	860
2004	38,925	804	182	622	744
2005	41,397	863	198	665	1,807
2006	43,424	939	232	707	1,320
2007	44,813	959	269	690	699



Source: Utah Population Estimates Committee.



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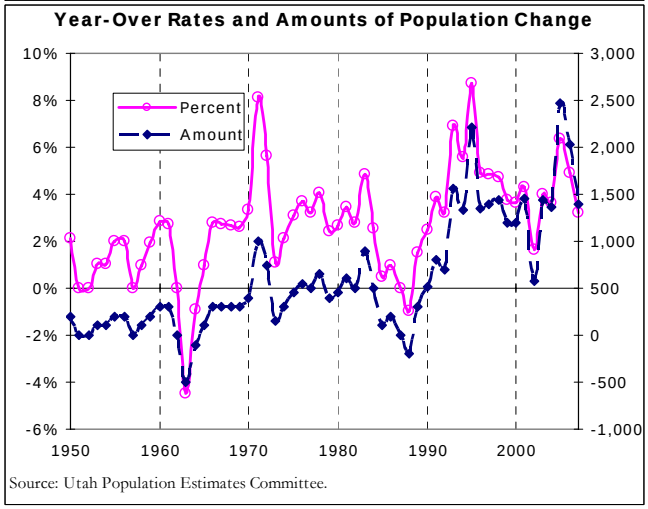


Source: Utah Population Estimates Committee.

Notes: Population estimates for July 1 were produced by the Utah Population Estimates Committee (UPEC). UPEC changed its rounding convention. Estimates before 1990 are rounded while those for 1990 and beyond are not rounded. Birth and death data are from the Utah Bureau of Health Statistics.
Source: Downloaded from www.governor.state.ut.us/dea on November 19, 2007.

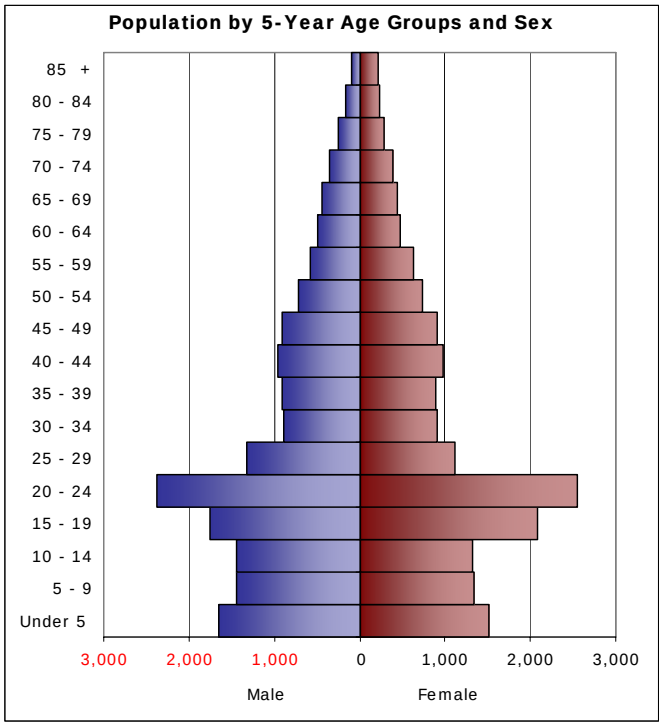
Cedar City was the largest city in the southwest region into the 1970s. It has continued to be the population center of Iron County, with an estimated July 1, 2006 population of 25,665, which is nearly two-thirds of the county population. Unincorporated areas of the county have a population of 6,893 (also in 2006), followed by Enoch, with an estimated population of 4,550. Since 2000, Cedar City and Enoch have gained shares of the total county population.

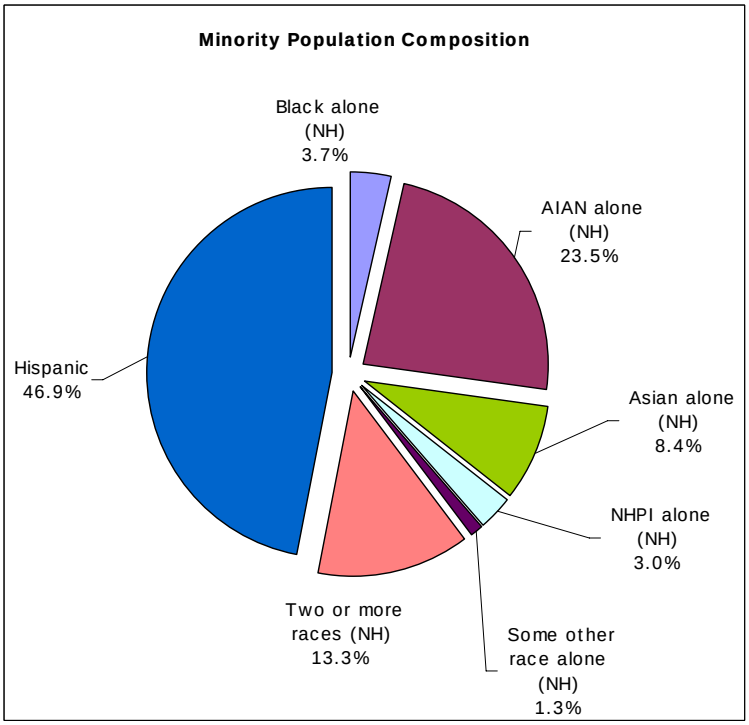
Age, Sex, Race, Ethnicity

Iron County has a classic college community age distribution, with "wings" in the college-age groups (15–19 and 20–24) (Exhibit 2). Census 2000 estimated enrollment of 5,249 individuals in college and graduate school in the county. In contrast to Beaver and Garfield counties, which experienced an exodus of persons in the college-age groups, Iron County imports people in large numbers. The median age was 24.2, among the youngest in the state. There was also a "missionary cave" on the male side of the age pyramid in the peak LDS religious service years (i.e., women particularly outnumber men in those ages). The beginnings of a retirement destination community were also evident in the slight overrepresentation of population in the 60–64, 65–69, and 70–74-year age groups (relative to the state). Because of the presence of college-age persons, the working-age population (18–64 years old) was 60 percent of the population, while youth (under age 18) were 31 percent and those over 65 were 9 percent of the total.

Nearly 3,000 minorities were enumerated in the 2000 Iron County population, representing almost 9 percent of the total. Hispanics were the largest minority population in the county, accounting for nearly half of all minorities. There were 692 American Indians counted, representing almost one-fourth of the Iron County population. Their numbers were only slightly larger than in 1990. The Hispanic population increased by 1,000 (from 382 to 1,383) from 1990 to 2000, while the Asian (not Hispanic) population increased from 98 to 249. The foreign-born population was estimated to be only 981 persons in 2000, 438 of whom were born in Latin America (and had migrated since 1990), 234 in Asia (migrated since 1990), and 182 from Europe (most immigrating before 1980). The growth of Southern Utah University and of the area's labor market in general is probably encouraging the in-migration of these diverse populations.

Exhibit 2
Iron County Population by Age and Sex, Race, and Ethnicity: 2000





Age Distribution of the Iron County Population

	Male	Female	Sex Ratio	Share	Share of State
Under 5	1,653	1,513	1.09	9.4%	1.5%
5–9	1,446	1,346	1.07	8.3%	1.4%
10–14	1,447	1,326	1.09	8.2%	1.4%
15–19	1,759	2,092	0.84	11.4%	**1.8%**
20–24	2,372	2,547	0.93	14.6%	**2.2%**
25–29	1,322	1,107	1.19	7.2%	1.4%
30–34	882	908	0.97	5.3%	1.2%
35–39	915	885	1.03	5.3%	1.2%
40–44	955	981	0.97	5.7%	1.3%
45–49	912	904	1.01	5.4%	1.4%
50–54	719	731	0.98	4.3%	1.4%
55–59	572	627	0.91	3.5%	1.5%
60–64	487	480	1.01	2.9%	**1.5%**
65–69	441	447	0.99	2.6%	**1.7%**
70–74	349	397	0.88	2.2%	**1.6%**
75–79	259	293	0.88	1.6%	1.4%
80–84	164	225	0.73	1.2%	1.4%
85 +	103	213	0.48	0.9%	1.5%
Total	16,757	17,022	0.98	100%	1.5%
Share 60 years+	**11.4%**				**1.5%**
Median Age	**24.2**				

Race and Ethnicity of the Iron County Population

	Population	Share	Share of State
Total	***33,779***	***100%***	***1.5%***
Not Hispanic or Latino	32,396	95.9%	**1.6%**
White alone	30,829	91.3%	**1.6%**
Black or African American alone	108	0.3%	0.7%
American Indian and Alaska Native alone	692	2.0%	**2.6%**
Asian alone	249	0.7%	0.7%
Native Hawaiian and Other Pacific Islander alone	88	0.3%	0.6%
Some other race alone	38	0.1%	**2.0%**
Two or more races	392	1.2%	1.3%
Ethnicity			
Hispanic or Latino	1,383	4.1%	0.7%
Minority	2,950	8.7%	0.9%

Note: NH is Not Hispanic. If a cell is shaded yellow and has bold red type, this indicates that the county's share of the state for the given category exceeds the county's share of total population in the state. Blue shading indicates a male-to-female ratio greater than one.

Source: Bureau of the Census, Census 2000, SF1.

Employment

Employment

Employment in Iron County increased more than four-fold, 338.8 percent, from 1970 to 2006 for an average annual rate of increase of 4.2 percent. From 1970 to 2000, the county accounted for 22.8 percent of regional growth; from 2001 to 2006 it contributed 14.9 percent (Tables 2a and 2b). Iron County is the second largest employment center in the region, though with Washington County's much faster growth (8 percent annually from 1970 to 2006) Iron's share of total regional employment has declined from 40.0 percent in 1970 to 22.2 percent in 2006.

Like all the counties in the southwest region, government is a major employer in Iron County. In 1970 it provided 34.8 percent of nonagricultural jobs; trade and services were the other major sectors with 23.7 percent and 12.8 percent, respectively. By 2000, government's share had declined to 26.7 percent, services had doubled to 26.0 percent, and trade's employment share was almost unchanged at 22.7 percent. Together, these three sectors accounted for more than three-quarters of the county's job growth. Over this period, manufacturing jobs grew from 8.2 percent to 12.2 percent of total employment, while mining jobs plummeted from 7.1 percent to 0.4 percent. In 2006, the four NAICS service sector groupings (professional and business, education and health, leisure and hospitality, and other) together accounted for 29.8 percent of total employment. Government provided 25.0 percent of jobs, trade, transportation, and utilities provided 18.0 percent, and construction 10.9 percent. Manufacturing also represented just over one-tenth of nonagricultural jobs (10.8 percent). Mining employment saw a significant jump in 2006 to 58 jobs from seven in 2005 and 3 in 2002–04.

The fastest-growing sectors from 1970 to 2000 were services, up 646.1 percent; construction, which increased 482.8 percent; and manufacturing, up 447.6 percent. The latter two contributed 7.1 percent and 13.7 percent, respectively, of total job growth over the period, while services was the greatest growth driver of all sectors with 30.9 percent. Only mining declined, losing 78.7 percent of its 1970 employment level. In the 2001–06 period, construction employment grew 111.9 percent, mining jobs grew 70.6 percent, and financial activity and education and health services both increased by about half. Only one sector saw employment losses: professional and business services were down 23.1 percent. The major contributors to employment growth in the period were construction (34.1 percent of new jobs), education and health services (18.4 percent), and trade, transportation, and utilities (16.7 percent). Leisure and hospitality, manufacturing, and government each accounted for about 10 percent of Iron's 2001–06 employment growth.

Table 2a
Iron County Nonagricultural Employment by SIC Sector, 1970–2000

	Mining		Construction		Manufacturing		TCPU		Trade		FIRE		Services		Government			Share of
Year	Number	Share	Number	Share	Number	Share	Number	Share	Number	Share	Number	Share	Number	Share	Number	Share	Total	Region
1970	272	7.1%	151	3.9%	313	8.2%	253	6.6%	906	23.7%	112	2.9%	490	12.8%	1,333	34.8%	3,830	40.0%
1980	158	2.8%	290	5.1%	451	8.0%	410	7.2%	1,513	26.7%	296	5.2%	657	11.6%	1,887	33.3%	5,662	35.3%
1990	156	2.0%	215	2.8%	723	9.4%	412	5.4%	2,065	27.0%	209	2.7%	1,533	20.0%	2,342	30.6%	7,655	28.5%
1991	62	0.8%	245	3.1%	719	9.0%	328	4.1%	2,179	27.3%	234	2.9%	1,645	20.6%	2,569	32.2%	7,981	27.9%
1992	28	0.3%	419	4.9%	864	10.1%	303	3.5%	2,381	27.9%	241	2.8%	1,732	20.3%	2,581	30.2%	8,549	27.9%
1993	31	0.3%	463	5.0%	857	9.2%	295	3.2%	2,584	27.8%	274	2.9%	1,990	21.4%	2,796	30.1%	9,290	27.4%
1994	17	0.2%	579	5.6%	970	9.4%	329	3.2%	2,723	26.4%	322	3.1%	2,354	22.8%	3,023	29.3%	10,317	26.4%
1995	87	0.8%	693	6.1%	1,203	10.7%	350	3.1%	2,891	25.6%	333	3.0%	2,598	23.0%	3,125	27.7%	11,280	26.3%
1996	74	0.6%	745	6.3%	1,360	11.5%	351	3.0%	2,997	25.3%	400	3.4%	2,671	22.5%	3,248	27.4%	11,846	25.9%
1997	52	0.4%	778	6.1%	1,675	13.1%	350	2.7%	3,164	24.8%	416	3.3%	2,933	23.0%	3,392	26.6%	12,760	26.5%
1998	54	0.4%	767	5.7%	1,793	13.4%	363	2.7%	3,241	24.2%	468	3.5%	3,114	23.3%	3,565	26.7%	13,365	26.5%
1999	63	0.5%	937	6.9%	1,810	13.3%	351	2.6%	3,156	23.2%	455	3.3%	3,190	23.4%	3,655	26.8%	13,617	26.0%
2000	58	0.4%	880	6.3%	1,714	12.2%	358	2.5%	3,190	22.7%	454	3.2%	3,656	26.0%	3,760	26.7%	14,070	25.8%
Change	–78.7%		482.8%		447.6%		41.5%		252.1%		305.4%		646.1%		182.1%		267.4%	
Share of Growth	–2.1%		7.1%		13.7%		1.0%		22.3%		3.3%		30.9%		23.7%		100%	22.8%

Note: TCPU = Transportation, Communications, and Public Utilities; FIRE = Finance, Insurance, and Real Estate. Figure at intersection of Share of Growth row and Share of Region column is the county's contribution to the region's growth.

Source: Utah Department of Workforce Services and BEBR calculations.

Table 2b
Iron County Nonagricultural Employment by NAICS Sector, 2001–2006

	Mining		Construction		Manufacturing		TTU		Information		Financial Activity		Prof. & Bus. Services		Ed. & Health Services		Leisure & Hospitality		Other Services		Government			Share of
Year	No.	Share	No.	Share	No.	Share	No.	Share	No.	Share	No.	Share	No.	Share	No.	Share	No.	Share	No.	Share	No.	Share	Total	Region
2001	34	0.2%	868	6.2%	1,496	10.7%	2,546	18.2%	110	0.8%	513	3.7%	1,654	11.8%	1,066	7.6%	1,494	10.7%	265	1.9%	3,914	28.0%	13,960	24.7%
2002	3	0.0%	885	6.3%	1,446	10.3%	2,490	17.7%	129	0.9%	576	4.1%	1,674	11.9%	1,177	8.3%	1,514	10.7%	323	2.3%	3,890	27.6%	14,107	24.3%
2003	3	0.0%	909	6.4%	1,497	10.6%	2,569	18.2%	110	0.8%	604	4.3%	1,317	9.3%	1,221	8.7%	1,563	11.1%	337	2.4%	3,978	28.2%	14,108	23.6%
2004	3	0.0%	1,029	7.0%	1,598	10.8%	2,677	18.1%	95	0.6%	577	3.9%	1,329	9.0%	1,311	8.9%	1,686	11.4%	304	2.1%	4,166	28.2%	14,775	22.9%
2005	7	0.0%	1,429	9.1%	1,705	10.8%	2,865	18.2%	101	0.6%	643	4.1%	1,339	8.5%	1,421	9.0%	1,806	11.4%	326	2.1%	4,140	26.2%	15,782	22.5%
2006	58	0.3%	1,839	10.9%	1,785	10.6%	3,022	18.0%	123	0.7%	784	4.7%	1,272	7.6%	1,591	9.5%	1,804	10.7%	334	2.0%	4,194	25.0%	16,806	22.2%
Change	70.6%		111.9%		19.3%		18.7%		11.8%		52.8%		–23.1%		49.2%		20.7%		26.0%		7.2%		20.4%	
Share of Growth	0.8%		34.1%		10.2%		16.7%		0.5%		9.5%		–13.4%		18.4%		10.9%		2.4%		9.8%		100%	14.9%

Note: TTU = Trade, Transportation, and Utilities. Figure at intersection of Share of Growth row and Share of Region column is the county's contribution to the region's growth.

Source: Utah Department of Workforce Services and BEBR calculations.

Wages

Total inflation-adjusted wages in Iron County quadrupled from 1970 to 2006, from $103.7 million to $414.4 million (in constant 2006 dollars) (Table 3). In spite of this growth, the county's share of total wages in the region declined over the period, from 42.0 percent to 20.5 percent. Inflation-adjusted average monthly wages also declined, by 8.9 percent, from $2,256 to $2,055. In 1970, 1980, and 1990 monthly wages in Iron County were above the regional average, but by 2000 they had slipped below and were 92.2 percent of the average in 2006.

Table 3
Real Wage Trends in Iron County, 1970–2006

	1970	1980	1990	2000	2006	Change
Total Wages (millions)	$103.7	$154.0	$183.9	$323.7	$414.4	299.6%
Share of Region	42.0%	37.0%	29.5%	24.1%	20.5%	–21.5%
Share of State	0.8%	0.8%	0.8%	0.9%	1.0%	0.1%
Average Monthly Wage	$2,256	$2,269	$2,002	$1,917	$2,055	–8.9%
vs. Region Average	105.0%	104.9%	103.6%	93.3%	92.2%	–12.8%
vs. State Average	79.2%	82.7%	77.9%	67.8%	71.3%	–7.9%

Note: Wages are in constant 2006 dollars.
Source: BEBR calculations based on Utah Department of Workforce Services data.

Looking at total wages by industry (Table 4a), in 1970 government was by far the dominant sector in the county, paying 35.5 percent of total wages. The next closest industries were trade and mining, paying 19.1 percent and 11.8 percent, respectively. By 2000, government's share had declined to 31.1 percent, trade to 16.7 percent, and mining to 0.7 percent. However, service sector wages now accounted for 19.9 percent of total wages (up from 7.2 percent in 1970) and manufacturing paid 16.2 percent (up from 7.8 percent).

By 2006 (Table 4b), under the NAICS industry classification system, government's share of total wages had declined to 27.4 percent, though it was still the largest; trade, transportation, and utilities paid 17.9 percent and manufacturing paid 13.2 percent. The service sectors combined paid 21.9 percent of total wages, with education and health services, professional and business services, and leisure and hospitality services contributing the larger shares.

From 1970 through 1994, mining jobs tended to have the highest monthly wages in Iron County, followed closely by those in the transportation, communications, and public utilities (TCPU) sector (Table 5a). In 1995 this situation switched, with TCPU jobs paying the highest wages followed by mining. From 2001 to 2006, under the NAICS classification, mining, manufacturing, and financial activity jobs paid the highest wages, with the government, information, and construction sectors also paying above-average wages (Table 5b). As of 2006, financial activity jobs paid the highest wages, while leisure and hospitality jobs paid the lowest.

Table 4a
Total Nonagricultural Wages in Iron County by SIC Sector, 1970–2000
(millions of current dollars, except where noted)

	Mining		Construction		Manufacturing		TCPU		Trade		FIRE		Services		Government		Total	
Year	Wages	Share	Wages	Share	Wages	Share	Wages	Share	Wages	Share	Wages	Share	Wages	Share	Wages	Share	Current $	Constant $
1970	$2.3	11.8%	$1.2	6.2%	$1.5	7.8%	$1.9	9.8%	$3.7	19.1%	$0.5	2.6%	$1.4	7.2%	$6.8	35.5%	$19.3	$103.7
1980	$3.9	6.2%	$3.9	6.2%	$5.0	8.0%	$8.1	13.1%	$11.2	18.0%	$3.0	4.9%	$6.0	9.7%	$21.2	34.0%	$62.4	$154.0
1990	$5.2	4.5%	$3.2	2.7%	$12.9	10.9%	$14.3	12.2%	$20.9	17.8%	$3.1	2.6%	$18.4	15.6%	$39.6	33.7%	$117.6	$183.9
1991	$1.7	1.4%	$3.8	3.2%	$13.9	11.6%	$9.7	8.2%	$23.6	19.8%	$3.5	3.0%	$20.1	16.9%	$42.7	35.9%	$119.0	$178.2
1992	$1.2	0.9%	$10.0	7.4%	$16.8	12.5%	$8.2	6.1%	$25.8	19.2%	$3.9	2.9%	$22.5	16.7%	$46.3	34.4%	$134.5	$194.9
1993	$1.3	0.9%	$9.2	6.2%	$18.3	12.5%	$9.2	6.2%	$28.8	19.6%	$4.5	3.1%	$26.1	17.8%	$49.8	33.8%	$147.1	$206.9
1994	$1.1	0.6%	$9.3	5.6%	$21.6	13.0%	$10.6	6.4%	$32.5	19.5%	$5.5	3.3%	$30.4	18.2%	$55.7	33.4%	$166.7	$229.2
1995	$2.5	1.3%	$11.7	6.2%	$27.1	14.3%	$11.5	6.1%	$35.0	18.5%	$6.3	3.3%	$35.4	18.7%	$60.1	31.7%	$189.5	$254.0
1996	$2.6	1.3%	$12.8	6.2%	$31.3	15.1%	$11.3	5.4%	$37.2	18.0%	$8.1	3.9%	$38.1	18.4%	$65.5	31.7%	$206.9	$270.1
1997	$1.5	0.6%	$14.6	6.3%	$38.1	16.5%	$12.3	5.3%	$41.4	17.9%	$8.7	3.8%	$43.8	18.9%	$70.9	30.7%	$231.2	$294.7
1998	$1.4	0.6%	$14.9	5.9%	$43.7	17.4%	$12.6	5.0%	$43.9	17.5%	$10.0	4.0%	$47.0	18.7%	$77.0	30.7%	$250.6	$313.5
1999	$1.8	0.7%	$17.8	6.8%	$45.1	17.1%	$12.6	4.8%	$45.7	17.4%	$10.1	3.8%	$49.2	18.7%	$80.9	30.7%	$263.2	$320.5
2000	$2.1	0.7%	$18.8	6.8%	$44.7	16.2%	$13.3	4.8%	$46.0	16.7%	$9.8	3.6%	$54.9	19.9%	$85.6	31.1%	$275.1	$323.7

Notes: TCPU = Transportation, Communications, and Public Utilities; FIRE = Finance, Insurance, and Real Estate. Constant-dollar figures are in 2006 dollars.
Source: Utah Department of Workforce Services and BEBR calculations.

Table 4b
Total Nonagricultural Wages in Iron County by NAICS Sector, 2001–2006
(millions of current dollars, except where noted)

	Mining		Construction		Manufacturing		TTU		Information		Financial Activity		Prof. & Bus. Services		Ed. & Health Services		Leisure & Hospitality		Other Services		Government		Total	
Year	Wages	Share	Wages	Share	Wages	Share	Wages	Share	Wages	Share	Wages	Share	Wages	Share	Wages	Share	Wages	Share	Wages	Share	Wages	Share	Current $	Constant $
2001	$1.2	0.4%	$18.4	6.5%	$42.2	14.9%	$51.4	18.2%	$2.5	0.9%	$11.5	4.1%	$24.7	8.7%	$20.1	7.1%	$13.0	4.6%	$4.7	1.7%	$93.2	32.9%	$283.0	$321.3
2002	$0.1	0.0%	$19.3	6.5%	$40.5	13.7%	$52.2	17.7%	$2.8	1.0%	$14.5	4.9%	$25.4	8.6%	$22.3	7.5%	$14.4	4.9%	$6.0	2.0%	$98.1	33.2%	$295.8	$329.5
2003	$0.1	0.0%	$20.7	6.9%	$41.8	14.0%	$54.3	18.1%	$2.5	0.8%	$17.2	5.7%	$19.1	6.4%	$23.7	7.9%	$15.2	5.1%	$6.3	2.1%	$98.5	32.9%	$299.4	$326.5
2004	$0.1	0.0%	$24.1	7.4%	$47.3	14.5%	$58.1	17.9%	$2.0	0.6%	$17.7	5.4%	$19.3	5.9%	$26.4	8.1%	$16.2	5.0%	$6.4	2.0%	$107.8	33.1%	$325.4	$346.8
2005	$0.2	0.1%	$35.6	9.8%	$50.9	14.0%	$65.5	18.1%	$2.5	0.7%	$22.4	6.2%	$22.5	6.2%	$28.6	7.9%	$18.6	5.1%	$7.0	1.9%	$108.7	30.0%	$362.5	$374.9
2006	$1.2	0.3%	$48.7	11.7%	$54.7	13.2%	$74.1	17.9%	$2.9	0.7%	$28.7	6.9%	$27.3	6.6%	$36.4	8.8%	$19.1	4.6%	$7.7	1.9%	$113.7	27.4%	$414.4	$414.4

Note: TTU = Trade, Transportation, and Utilities. Constant-dollar figures are in 2006 dollars.
Source: Utah Department of Workforce Services and BEBR calculations.

Table 5a
Average Monthly Nonagricultural Wages in Iron County
by SIC Sector, 1970–2000
(current dollars, except where noted)

Year	Mining	Const.	Mfg.	TCPU	Trade	FIRE	Services	Gov't.	Total Average	
									Current $	Constant $
1970	$695	$655	$401	$625	$339	$375	$235	$427	$419	$2,256
1980	$2,040	$1,115	$922	$1,655	$618	$855	$773	$935	$919	$2,269
1990	$2,802	$1,223	$1,483	$2,895	$845	$1,234	$999	$1,408	$1,280	$2,002
1991	$2,258	$1,304	$1,605	$2,471	$903	$1,254	$1,017	$1,385	$1,242	$1,861
1992	$3,449	$1,991	$1,618	$2,242	$904	$1,338	$1,081	$1,494	$1,311	$1,900
1993	$3,403	$1,647	$1,784	$2,585	$928	$1,367	$1,094	$1,483	$1,319	$1,856
1994	$5,167	$1,333	$1,857	$2,682	$996	$1,420	$1,077	$1,536	$1,346	$1,851
1995	$2,434	$1,403	$1,876	$2,731	$1,009	$1,577	$1,134	$1,602	$1,400	$1,876
1996	$2,925	$1,433	$1,918	$2,676	$1,034	$1,693	$1,190	$1,680	$1,456	$1,900
1997	$2,372	$1,559	$1,898	$2,925	$1,090	$1,742	$1,243	$1,743	$1,510	$1,925
1998	$2,235	$1,618	$2,032	$2,884	$1,129	$1,784	$1,257	$1,800	$1,562	$1,955
1999	$2,362	$1,587	$2,077	$2,993	$1,206	$1,841	$1,285	$1,845	$1,611	$1,961
2000	$2,953	$1,777	$2,172	$3,097	$1,203	$1,798	$1,251	$1,896	$1,629	$1,917

Notes: TCPU = Transportation, Communications, and Public Utilities; FIRE = Finance, Insurance, and Real Estate. Constant-dollar figures are in 2006 dollars.
Source: Utah Department of Workforce Services and BEBR calculations.

Table 5b
Average Monthly Nonagricultural Wages in Iron County by NAICS Sector, 2001–2006
(current dollars, except where noted)

Year	Mining	Const.	Mfg.	TTU	Info.	Fin'l. Act.	Prof & Bus.	Ed. & Health	Leisure & Hosp.	Other Svcs.	Gov't.	Total Average	
												Current $	Constant $
2001	$2,889	$1,763	$2,352	$1,684	$1,908	$1,875	$1,246	$1,568	$727	$1,474	$1,985	$1,689	$1,918
2002	$1,880	$1,821	$2,336	$1,748	$1,825	$2,102	$1,266	$1,580	$795	$1,543	$2,102	$1,748	$1,946
2003	$2,469	$1,893	$2,328	$1,762	$1,922	$2,367	$1,208	$1,620	$808	$1,561	$2,063	$1,768	$1,929
2004	$2,543	$1,956	$2,464	$1,808	$1,774	$2,555	$1,210	$1,679	$799	$1,765	$2,157	$1,835	$1,956
2005	$2,968	$2,078	$2,488	$1,906	$2,037	$2,902	$1,401	$1,677	$858	$1,787	$2,187	$1,914	$1,980
2006	$1,766	$2,206	$2,554	$2,043	$1,971	$3,046	$1,790	$1,906	$883	$1,917	$2,258	$2,055	$2,055

Notes: TTU = Trade, Transportation, and Utilities. Constant-dollar figures are in 2006 dollars.
Source: Utah Department of Workforce Services and BEBR calculations.

Agricultural Employment

The preceding discussion focused on nonagricultural employment, but agriculture is a significant activity in southwestern Utah. The Bureau of Economic Analysis (BEA) publishes county-level employment data back to 1969, breaking down total employment into farm employment and nonfarm employment. Table 6 presents the BEA numbers for total employment and farm employment in Iron County for 1970 through 2005 (2006 data are not yet available). These figures do not coincide with the DWS nonagricultural employment numbers because the BEA uses a different accounting method. The BEA includes proprietors employment, that is, self-employed farmers and other small-business owners, and private household workers, e.g. domestic servants; whereas the DWS reports only wage and salary employment based on company payrolls. Therefore, subtracting farm employment from total employment in the table below will not give figures that match the total nonagricultural employment numbers in the tables above.

Table 6
Iron County Farm Employment, 1970–2005

	1970	1980	1990	2000	2001	2002	2003	2004	2005	Change
Total employment	5,202	7,376	10,263	19,149	19,386	19,598	19,815	20,646	21,955	322.0%
Farm employment	676	536	570	595	598	566	589	575	578	–14.5%
Share of Total	13.0%	7.3%	5.6%	3.1%	3.1%	2.9%	3.0%	2.8%	2.6%	–10.4%

Source: Regional Economic Information System, Bureau of Economic Analysis, U.S. Department of Commerce.

Although farm employment's *share* of total employment declined in every county in the region over the study period, the *number* of farm jobs grew in three counties: Beaver, Garfield, and, somewhat surprisingly, Washington. Iron County had a significant share of total employment in farming in 1970, with 13.0 percent, but by 2005 farm jobs had fallen to 2.6 percent of total employment.

Occupations

To get a better picture of what Iron County residents do, BEBR looked at the Census Bureau's occupational distribution of the civilian workforce aged 16 and older, which is given by place of residence (Table 7).

In 2000, nearly equal shares of county residents worked in management, professional, and related occupations (27.5 percent) and in sales and office occupations (28.5 percent). About 16 percent of the population were engaged in service occupations, and 13 percent in both construction, extraction, and maintenance occupations and production, transportation, and material-moving occupations. Iron County women were highly concentrated in sales and office occupations (40.6 percent), with 23.3 percent in office and administrative support occupations and 17.3 percent in sales and related occupations. A further 12.1 percent of women were employed in education, training, and library occupations. Iron County men were more evenly distributed among the occupations; 15.4 percent worked in construction, 14.2 percent were in sales and related occupations, 9.4 percent in transportation and material-moving occupations, 9.1 percent in management occupations (excluding farmers and farm managers), and 8.5 percent in production occupations.

Major Employers

Southern Utah University is of course a major employer in Iron County, if not the single largest employer, but there is also a significant manufacturing cluster in Iron (Table 8). As early as 1970, the Coleman Co. was one of the county's major employers. Interstate 15 and the Union Pacific rail line, running west and south through Las Vegas to Los Angeles and north to Salt Lake City, have supported this industry's growth in the county.

Table 7
Occupational Distribution by Sex for Employed Residents of Iron County, 2000

Occupation	Total	Male	Female
Employed civilian population 16 years and over	15,484	8,484	7,000
Management, professional, and related occupations	27.5%	26.7%	28.3%
Management, business, and financial operations occupations	10.6%	13.1%	7.6%
Management occupations, except farmers and farm managers	6.9%	9.1%	4.2%
Farmers and farm managers	1.3%	2.2%	0.1%
Business and financial operations occupations	2.5%	1.8%	3.3%
Business operations specialists	0.9%	0.6%	1.3%
Financial specialists	1.6%	1.2%	2.1%
Professional and related occupations	16.8%	13.6%	20.7%
Computer and mathematical occupations	0.8%	1.2%	0.2%
Architecture and engineering occupations	1.3%	1.8%	0.6%
Architects, surveyors, cartographers, and engineers	0.7%	1.0%	0.3%
Drafters, engineering, and mapping technicians	0.6%	0.8%	0.3%
Life, physical, and social science occupations	0.7%	0.9%	0.6%
Community and social services occupations	1.4%	1.1%	1.8%
Legal occupations	0.4%	0.2%	0.7%
Education, training, and library occupations	8.4%	5.4%	12.1%
Arts, design, entertainment, sports, and media occupations	1.1%	1.1%	1.1%
Healthcare practitioners and technical occupations	2.7%	1.9%	3.7%
Health diagnosing and treating practitioners and technical occupations	1.9%	1.6%	2.2%
Health technologists and technicians	0.8%	0.3%	1.5%
Service occupations	16.2%	11.2%	22.4%
Healthcare support occupations	1.7%	0.4%	3.2%
Protective service occupations	1.0%	1.4%	0.6%
Fire fighting, prevention, and law enforcement workers, including supervisors	0.6%	0.9%	0.2%
Other protective service occupations, including supervisors	0.5%	0.5%	0.4%
Food preparation and serving related occupations	6.6%	3.8%	9.9%
Building and grounds cleaning and maintenance occupations	4.3%	4.6%	3.9%
Personal care and service occupations	2.7%	0.9%	4.8%
Sales and office occupations	28.5%	18.5%	40.6%
Sales and related occupations	15.6%	14.2%	17.3%
Office and administrative support occupations	12.9%	4.3%	23.3%
Farming, fishing, and forestry occupations	1.7%	2.5%	0.8%
Construction, extraction, and maintenance occupations	13.0%	23.1%	0.8%
Construction and extraction occupations	9.0%	15.7%	0.7%
Supervisors, construction and extraction workers	1.2%	2.2%	0.0%
Construction trades workers	7.5%	13.2%	0.6%
Extraction workers	0.2%	0.3%	0.1%
Installation, maintenance, and repair occupations	4.1%	7.4%	0.1%
Production, transportation, and material-moving occupations	13.1%	18.0%	7.1%
Production occupations	7.3%	8.5%	5.7%
Transportation and material moving-occupations	5.8%	9.4%	1.4%
Supervisors, transportation and material-moving workers	0.3%	0.5%	0.0%
Aircraft and traffic control occupations	0.3%	0.6%	0.0%
Motor vehicle operators	3.0%	4.9%	0.8%
Rail, water and other transportation occupations	0.1%	0.2%	0.0%
Material-moving workers	2.1%	3.3%	0.5%

Note: Shading indicates shares that exceed those for the rest of the state (excluding Iron County).
Source: U.S. Census Bureau.

Table 8
Major Employers in Iron County, 2006

Company	Industry	Employees
Southern Utah University	Educational Services	500–999
Smead Manufacturing Co.	Manufacturing	250–499
Wal-Mart	Retail Trade	250–499
Convergys Cust. Mgmt.	Admin. & Support and Waste Mgmt. & Remed. Svcs.	250–499
Valley View Medical Center	Health Care and Social Assistance	250–499
Brian Head Resort	Arts, Entertainment and Recreation	250–499
Milgro Newcastle Inc.	Agriculture, Forestry, Fishing, and Hunting	100–249
American Pacific Corp.	Manufacturing	100–249
Genpak LLC	Manufacturing	100–249
Metalcraft Technologies Inc.	Manufacturing	100–249
Home Depot USA Inc.	Retail Trade	100–249
Lin's Supermarket Inc.	Retail Trade	100–249
Leavitt Group Enterprises Inc.	Finance and Insurance	100–249
Iron County School District	Educational Services	100–249
CC Nursing Home LLC	Health Care and Social Assistance	100–249
Cedar City Corporation	Public Administration	100–249

Source: Utah Department of Workforce Services.

Commute Patterns

Iron County had net out-commuting of 357 workers in 2000 (Table 9). Washington County was not only the largest source of in-commuters to Iron, sending 544 or 53.9 percent of all in-commuters, it was also the main destination of out-commuters, attracting 677 or 49.5 percent of out-commuters. Beaver County was the second largest source and destination, sending 104 workers (10.3 percent) and receiving 187 workers (13.7 percent). Garfield and Kane counties sent 4.5 percent and 1.1 percent of in-commuters, respectively, and received 1.0 percent and 2.7 percent of out-commuters, respectively. Only 6.7 percent of in-commuters came from out of state and Coconino County, Ariz., was the largest source. It sent 12, accounting for 1.2 percent of all in-commuters. One in five out-commuters worked out of state, and major destinations included Clark County, Nev. (109 or 8.0 percent of all out-commuters), San Juan County, N.M. (26 or 1.9 percent), and Orange County, Calif. (25 or 1.8 percent).

Table 9
Iron County Summary Commute Flows, 2000

In-Commuting to Iron County

Residence County	No.	Share
Washington Co., UT	544	53.9%
Beaver Co., UT	104	10.3%
Sevier Co., UT	89	8.8%
Garfield Co., UT	45	4.5%
Salt Lake Co., UT	45	4.5%
Utah Co., UT	28	2.8%
Davis Co., UT	16	1.6%
Millard Co., UT	13	1.3%
Coconino Co., AZ	12	1.2%
Kane Co., UT	11	1.1%
Other	103	10.2%
Total In-Commuters	1,010	100%

Out-Commuting from Iron County

Workplace County	No.	Share
Washington Co., UT	677	49.5%
Beaver Co., UT	187	13.7%
Clark Co., NV	109	8.0%
Kane Co., UT	37	2.7%
Millard Co., UT	35	2.6%
Utah Co., UT	32	2.3%
San Juan Co., NM	26	1.9%
Orange Co., CA	25	1.8%
Salt Lake Co., UT	19	1.4%
Garfield Co., UT	14	1.0%
Other	206	15.1%
Total Out-Commuters	1,367	100%
Net Out-Commuters	357	

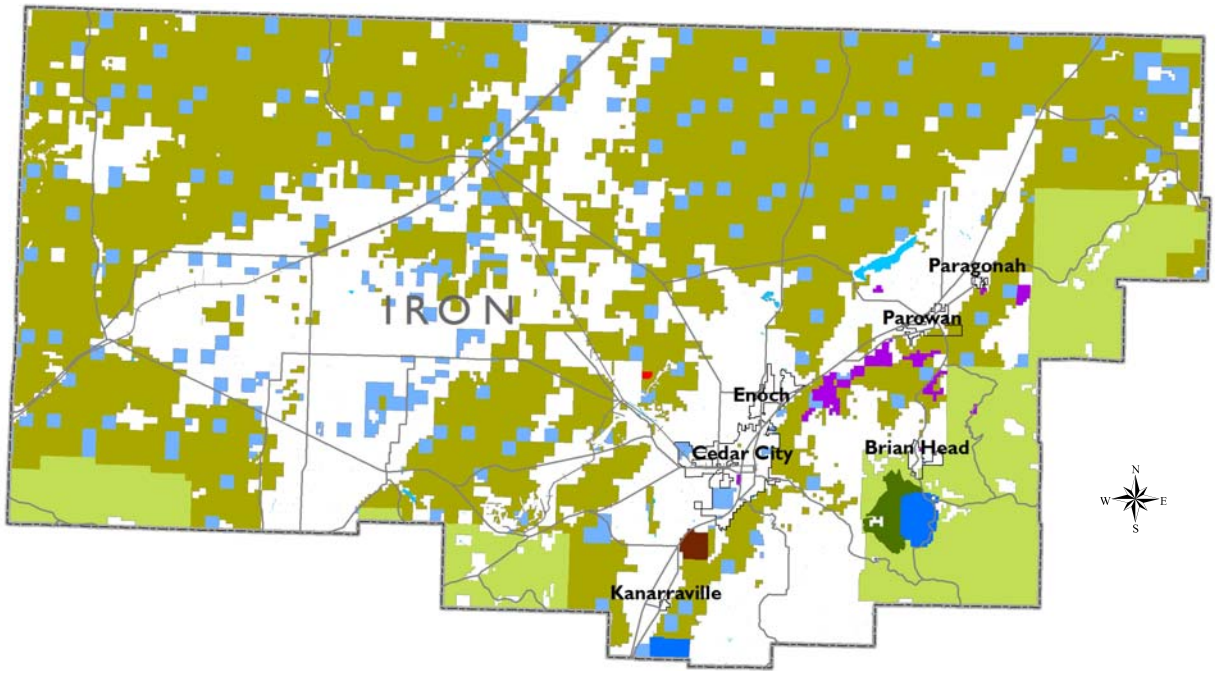
Source: U.S. Census Bureau, 2000 County-to-County Worker Flow Files.

Real Estate and Construction

Land Ownership

Among the five counties in the southwest region, Iron County has the highest proportion of land in private ownership, with more than one-third (35.7 percent) privately owned (Exhibit 3). The federal government holds more than half (57.5 percent) of the land in the county. Most of this is BLM land, but there's also Cedar Breaks National Monument, the northern tip of Zion National Park, and about 240,000 acres of Dixie National Forest. State lands make up 6.7 percent of the county, the majority of which are trust lands. However, Iron also has the second largest amount, about 8,300 acres, of state wildlife reserve in the region. Iron is also one of two counties with Paiute tribal lands, though at 2,500 acres they account for only 0.1 percent of the county's land.

Exhibit 3
Land Ownership in Iron County by Entity



Bureau of Land Management
US Forest Service
USFS Wilderness Area
National Park Service
State Trust Land
State Wildlife Reserve
State Parks and Recreation
Paiute Tribal Lands
Private
Water

Owner	Acres	Share
Federal Government	1,215,177	57.5%
Bureau of Land Management	963,347	45.6%
US Forest Service	235,911	11.2%
USFS Wilderness Area	7,068	0.3%
National Park Service	8,851	0.4%
State Government	141,184	6.7%
State Trust Land	132,690	6.3%
State Wildlife Reserve	8,255	0.4%
State Parks and Recreation	240	0.01%
Paiute Tribal Lands	2,503	0.1%
Private	754,031	35.7%
Water	440	0.03%
Total	2,113,335	100%

Source: Utah Automated Geographic Reference Center, last update March 3, 2007, downloaded September 19, 2007; Bureau of Economic and Business Research, University of Utah.

Residential Construction

In 2007 Iron County had a housing inventory of 18,127 units (Table 10). Only about one in ten housing units in the county were for seasonal or recreational use, the lowest share among the five southwest counties. The total number of occupied units in the county in 2007 was 15,387, of which 3,936 or 25.6 percent were rental units. Iron County has the highest percentage of rental units, well ahead of the 17.7 percent share for Washington County. The unusually high number of rental units is a reflection of the off-campus housing needs of students at Southern Utah University. The recent housing boom in Iron County has added significantly to the housing inventory, consequently one out of every four housing units in the county has been built since 2000.

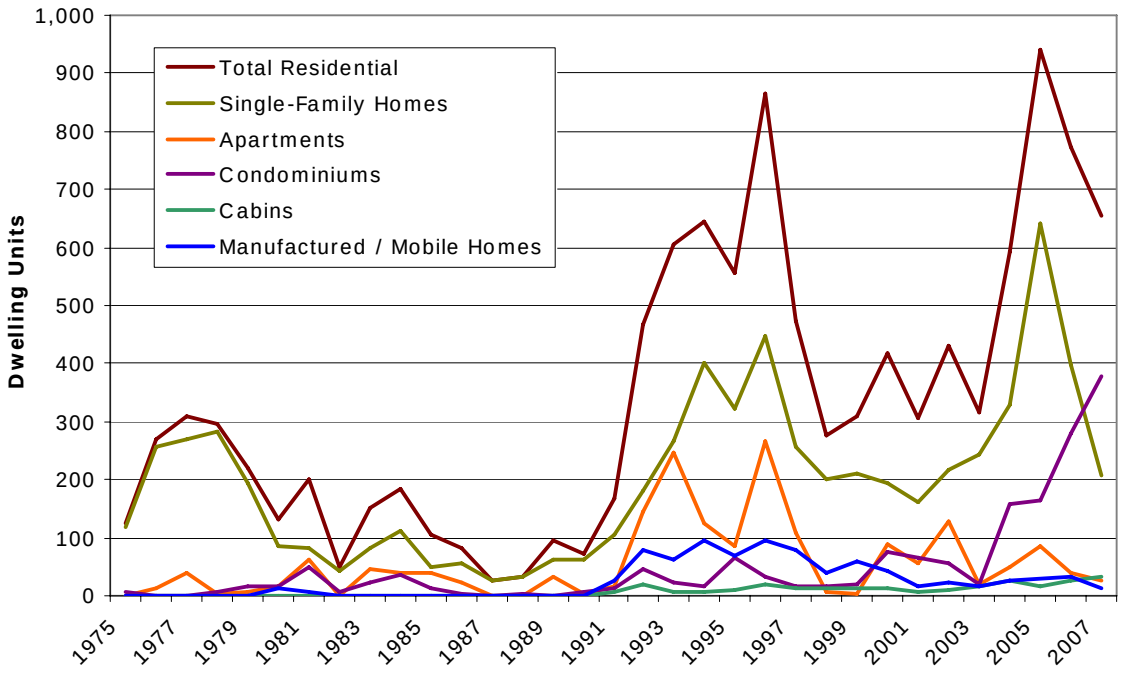
Table 10
Housing Profile for Iron County, 2007

Total Housing Units	18,127
Year-Round Housing Units	16,028
Vacant Year Round	641
Total Occupied Year Round	15,387
Owner-Occupied	11,450
% of Total Occupied Units	74.4%
Renter-Occupied	3,936
% of Total Occupied Units	25.6%
Recreation or Seasonal Units	2,099
% of Total Housing Units	11.6%
% of Units Built Since 2000	24.9%

Source: Bureau of Economic and Business Research, University of Utah.

The residential construction cycle in Iron County can be divided into two distinct periods: before 1990 and after 1990. The first period is characterized by low levels of new residential construction. Between 1975 and 1990 the number of permits for new residential construction exceeded 300 units in only one year, 1977. But since 1990 the number of permits has fallen below 300 units in only two years, 1991, when permits for 168 units were issued, and 1998, when 276 units were permitted. The sudden and dramatic rise in residential construction activity is shown in Figure 1 and Table 11.

Figure 1
Permit-Authorized Dwelling Units in Iron County, 1975-2007



Note: Condominiums include duplexes and twin homes.
Source: Bureau of Economic and Business Research, University of Utah.

Table 11
Permit-Authorized Dwelling Units in Iron County, 1975–2007

	Single-Family Homes	Duplexes and Twin Homes	Condominiums	Apartments (3 or more units)	Other Shelters	Cabins	Manufactured / Mobile Homes	Total Residential
1975	120	6	0	0	0	0	0	126
1976	257	0	0	13	0	0	1	271
1977	271	0	0	39	0	0	0	310
1978	282	8	0	4	0	0	1	295
1979	194	18	0	7	0	0	0	219
1980	86	16	0	16	0	0	13	131
1981	82	50	0	64	0	0	5	201
1982	43	6	0	0	0	0	0	49
1983	81	24	0	46	0	0	0	151
1984	111	36	0	38	0	0	0	185
1985	50	14	0	40	0	0	0	104
1986	56	2	0	24	0	0	0	82
1987	25	0	0	0	0	0	0	25
1988	32	2	0	0	0	0	0	34
1989	63	0	0	34	0	0	0	97
1990	63	6	0	4	0	0	0	73
1991	106	12	0	17	0	7	26	168
1992	180	30	16	145	0	19	78	468
1993	265	6	18	248	0	6	62	605
1994	401	16	0	124	0	7	96	644
1995	324	44	23	87	0	10	69	557
1996	449	32	0	267	0	21	95	864
1997	256	16	0	109	0	14	79	474
1998	202	12	3	8	0	12	39	276
1999	212	20	0	4	0	14	59	309
2000	195	76	0	90	0	12	44	417
2001	162	66	0	55	0	6	18	307
2002	216	50	6	127	0	10	23	432
2003	244	2	18	21	0	15	15	315
2004	329	100	58	50	0	27	27	591
2005	643	130	35	87	0	15	31	941
2006	397	256	22	38	0	26	34	773
2007	206	244	134	26	0	33	13	656

Source: Bureau of Economic and Business Research, University of Utah.

The increase in new residential construction in the 1990s was partly due to a large number of new apartment units. Over a six-year period in the 1990s building permits were issued for nearly 1,000 new apartment units. The peak apartment year was 1996, with 267 new units. The new apartment activity in 1996 pushed the total number of new residential units in that year to 864, an all-time record that was not broken until 2005 with 941 units.

During the current decade the level of residential construction has been pushed higher by new condominium and duplex/twin-home construction rather than apartment construction; apartment construction has contributed but at a lower level than in the 1990s. In 2007 condominiums and duplexes/twin-homes totaled 378 units, compared with 206 detached single-family units, and accounted for 58 percent of all new residential construction.

Since 1990 building permits have been issued for 8,870 residential units in Iron County. New residential construction in Cedar City has accounted for two-thirds of these units, while Enoch City and unincorporated Iron County have captured nearly all the remaining new home construction.

Nonresidential Construction

Since 1975 Iron County has issued building permits for $764.4 million (in constant 2007 dollars) of nonresidential construction (Table 12). The peak nonresidential year was 1992, with $93.8 million in new construction (Figure 2), which included the $80 million American Pacific facility for the manufacture of automobile airbag parts. American Pacific is the highest-value manufacturing facility in Iron County history. In 1994, another large manufacturer, O'Sullivan's Furniture, received a permit for a $21 million manufacturing plant. Unfortunately O'Sullivan's ceased operation in Iron County in 2001. The two highest-value retail buildings built in the county are the Wal-Mart and Home Deport. The $9 million Wal-Mart was built in 2000 and the $4 million Home Depot in 2004. Other large projects in recent years include the Canyon View High School for $28 million in 1999, the $26

million SUU Physical Education Building in 2000, and the $19 million Valley View Medical Center (IHC) in 2001.

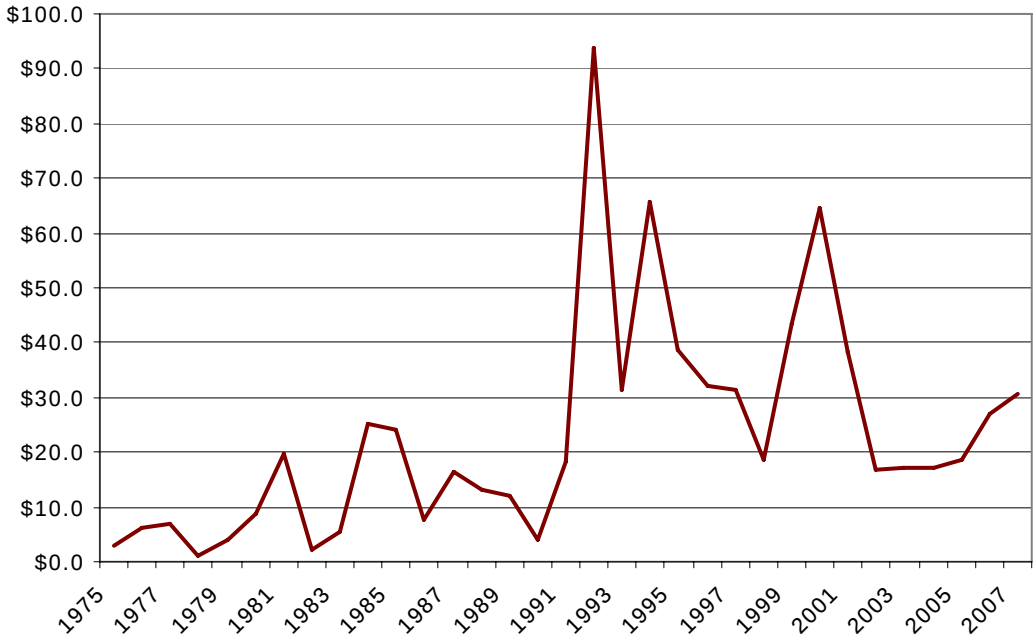
Since 1975 the leading nonresidential construction sector has been public buildings (including public schools and SUU), with $215.8 million in new construction (Table 13). The second-ranked sector is industrial construction with $214.0 million. These two sectors have dominated nonresidential construction with over 50 percent of permit value since 1975. Although much lower, both the retail and office sectors have respectable levels of construction activity. Since 1975 building permits have been issued for $80.9 million in retail and restaurants and $54.1 million in new office buildings.

Table 12
Value of Nonresidential Construction by Type in Iron County, 1975–2007
(thousands of constant 2007 dollars)

	Hotels	Churches	Industrial	Hospitals	Office	Retail	Public	Other	Total
1975	$0.0	$0.0	$0.0	$0.0	$1,441.6	$876.9	$0.0	$466.3	$2,784.8
1976	$2,096.5	$0.0	$0.0	$0.0	$662.5	$1,006.3	$1,749.3	$559.8	$6,074.5
1977	$2,464.0	$0.0	$2,763.9	$0.0	$0.0	$1,617.0	$0.0	$34.4	$6,879.3
1978	$0.0	$0.0	$0.0	$0.0	$0.0	$1,220.9	$0.0	$0.0	$1,220.9
1979	$0.0	$172.2	$509.6	$0.0	$1,721.5	$1,084.6	$6.9	$423.5	$3,918.2
1980	$0.0	$0.0	$2,771.5	$0.0	$1,833.6	$1,690.9	$1,020.7	$1,502.6	$8,819.3
1981	$0.0	$56.3	$2,172.4	$0.0	$0.0	$6,190.7	$0.0	$11,445.8	$19,865.1
1982	$0.0	$0.0	$0.0	$0.0	$873.1	$304.9	$0.0	$1,151.9	$2,329.9
1983	$3,640.6	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$1,861.4	$5,502.0
1984	$3,424.2	$1,918.2	$0.0	$0.0	$0.0	$264.2	$18,982.0	$452.2	$25,040.8
1985	$6,754.0	$0.0	$312.5	$0.0	$0.0	$948.9	$15,125.1	$785.9	$23,926.4
1986	$0.0	$0.0	$0.0	$0.0	$3,553.4	$452.2	$3,013.0	$540.2	$7,558.8
1987	$0.0	$2,058.2	$576.0	$0.0	$373.4	$1,120.3	$11,582.8	$740.8	$16,451.4
1988	$0.0	$0.0	$8,223.3	$0.0	$72.0	$0.0	$4,646.2	$258.0	$13,199.4
1989	$1,093.5	$457.3	$51.7	$0.0	$1,683.5	$4,565.1	$469.2	$3,756.4	$12,076.7
1990	$0.0	$2,062.0	$401.4	$0.0	$0.0	$0.0	$777.7	$718.9	$3,960.0
1991	$0.0	$0.0	$245.8	$0.0	$66.2	$4,083.8	$11,651.9	$2,373.7	$18,421.3
1992	$4,985.3	$0.0	$83,006.0	$0.0	$1,268.6	$498.8	$1,037.1	$3,015.1	$93,810.9
1993	$2,347.3	$574.5	$7,643.6	$0.0	$552.4	$1,322.8	$16,439.2	$2,514.5	$31,394.2
1994	$0.0	$2,351.2	$28,251.6	$0.0	$3,266.3	$2,392.0	$26,267.7	$3,285.3	$65,814.0
1995	$0.0	$3,241.8	$104.8	$637.0	$1,938.3	$3,593.2	$24,372.4	$4,831.3	$38,718.9
1996	$0.0	$218.0	$18,320.5	$256.3	$4,761.5	$2,085.0	$369.7	$6,097.1	$32,108.0
1997	$7,319.4	$7,898.2	$473.7	$0.0	$4,266.5	$4,561.2	$3,229.6	$3,641.8	$31,390.3
1998	$379.5	$0.0	$556.8	$3,809.2	$7,123.1	$934.9	$4.6	$5,899.5	$18,707.7
1999	$0.0	$0.0	$665.9	$5,496.6	$2,651.9	$995.6	$30,942.2	$2,834.6	$43,586.8
2000	$0.0	$0.0	$11,371.2	$0.0	$3,333.9	$10,828.8	$28,221.3	$10,853.0	$64,608.2
2001	$0.0	$0.0	$949.5	$19,638.5	$146.5	$2,554.8	$12,018.3	$3,121.0	$38,428.7
2002	$3,416.7	$1,786.5	$2,320.3	$2,969.3	$3,742.4	$34.2	$741.6	$1,830.1	$16,841.2
2003	$0.0	$3,819.0	$4,099.3	$2,096.4	$1,642.2	$688.8	$3,134.4	$1,652.3	$17,132.3
2004	$3,375.1	$0.0	$2,605.1	$0.0	$1,326.8	$8,366.5	$0.0	$1,649.5	$17,323.0
2005	$0.0	$0.0	$2,952.8	$0.0	$5,058.4	$4,856.4	$1.2	$5,760.1	$18,628.8
2006	$0.0	$0.0	$19,925.8	$0.0	$0.0	$3,787.5	$0.0	$3,452.1	$27,165.3
2007	$0.0	$2,935.0	$12,724.9	$100.0	$700.0	$7,955.1	$0.0	$6,284.7	$30,699.7
Total	$41,296.2	$29,548.5	$213,999.9	$35,003.2	$54,059.3	$80,882.2	$215,804.2	$93,793.7	$764,387.2

Source: Bureau of Economic and Business Research, University of Utah.

Figure 2
Value of Nonresidential Construction in Iron County, 1975–2007
(millions of constant 2007 dollars)



Source: Bureau of Economic and Business Research, University of Utah.

Table 13
Value and Share of Nonresidential Construction by Type in Iron County, 1975–2007
(thousands of constant 2007 dollars)

	Total Value	Share
Public Buildings & Projects	$215,804.2	28.2%
Industrial/Warehouse/Manufacturing Bldgs.	$213,999.9	28.0%
Other	$93,793.7	12.3%
Retail, Mercantile, Restaurant	$80,882.2	10.6%
Office, Bank, Professional Bldgs.	$54,059.3	7.1%
Hotels & Motels	$41,296.2	5.4%
Hospital & Institutional Bldgs.	$35,003.2	4.6%
Churches & other Religious Bldgs.	$29,548.5	3.9%
Total	$764,387.2	100%

Source: Bureau of Economic and Business Research, University of Utah.

Higher Education

One of the factors driving the current study was a desire to better understand the role of higher education in economic development, that is, how Southern Utah University and Dixie State College contribute to the region's economic growth. In a review of recent research on the regional economic impacts of universities,[1] Joshua Drucker and Harvey Goldstein list eight outputs of research universities that may influence economic development: creation of knowledge, human-capital creation, transfer of existing know-how, technological innovation, capital investment, regional leadership, knowledge infrastructure production, and influence on the regional milieu. Since neither Southern Utah University nor Dixie State College are research universities, their effects on the regional economy are likely to be confined to human capital creation, capital investment, regional leadership, and influence on the regional milieu.

The Utah Shakespearean Festival, affiliated with SUU, was originally established to capitalize on the large number of summer visitors to the nearby national parks. It has since evolved into a tourism draw in its own right, with a season running from June through October. The Festival's web site notes: "The Festival has grown from a budget of under $1,000 in 1961 to over $6 million today…. In 2002 alone, direct and indirect expenditures by the Festival and its patrons were estimated at nearly $64 million. In the first year of operation, the Festival attracted 3,276 visitors."[2] In 2006, over 124,000 attended.

Degrees Awarded

SUU is training future teachers and businesspeople. Of the 868 bachelor's degrees awarded in 2007, 185 were in education and 135 were in business and marketing (Table 14). Health professions, biological/life sciences, communications, and psychology were also popular, ranging from 50 to 86 degrees awarded. The most popular of its eight master's degrees[3] is that in education, representing 142 of the 204 degrees awarded in 2007. SUU also awarded 168 associate's degrees in 2007, most of which (148) were in general studies. As of fall 2007, SUU employed 1,149 FTEs.

Since the 1981–82 academic year, the total number of degrees awarded at SUU has increased 315 percent, from 301 certificates and degrees in 1982 to 1,250 in 2007 (Exhibit 4). SUU has seen its greatest growth in master's degrees, which have increased a hundredfold from two awarded in 1986 to 204 in 2007 in business, communications, education, and arts administration. In 2007, Dixie awarded about as many associate's degrees as SUU awarded bachelor's degrees, 864 vs. 868, with each representing roughly two-thirds of each school's total.

[1] Drucker, Joshua, and Harvey Goldstein. "Assessing the Regional Economic Development Impacts of Universities: A Review of Current Approaches." *International Regional Science Review*, vol. 30, no. 1 (January 2007): 20–46.
[2] http://www.bard.org/about/quickfacts.html; accessed August 28, 2007.
[3] According to the university's web site, SUU offers master's degrees in accountancy, arts administration, business administration, education, forensic science, professional communication, public administration, and sports conditioning and performance.

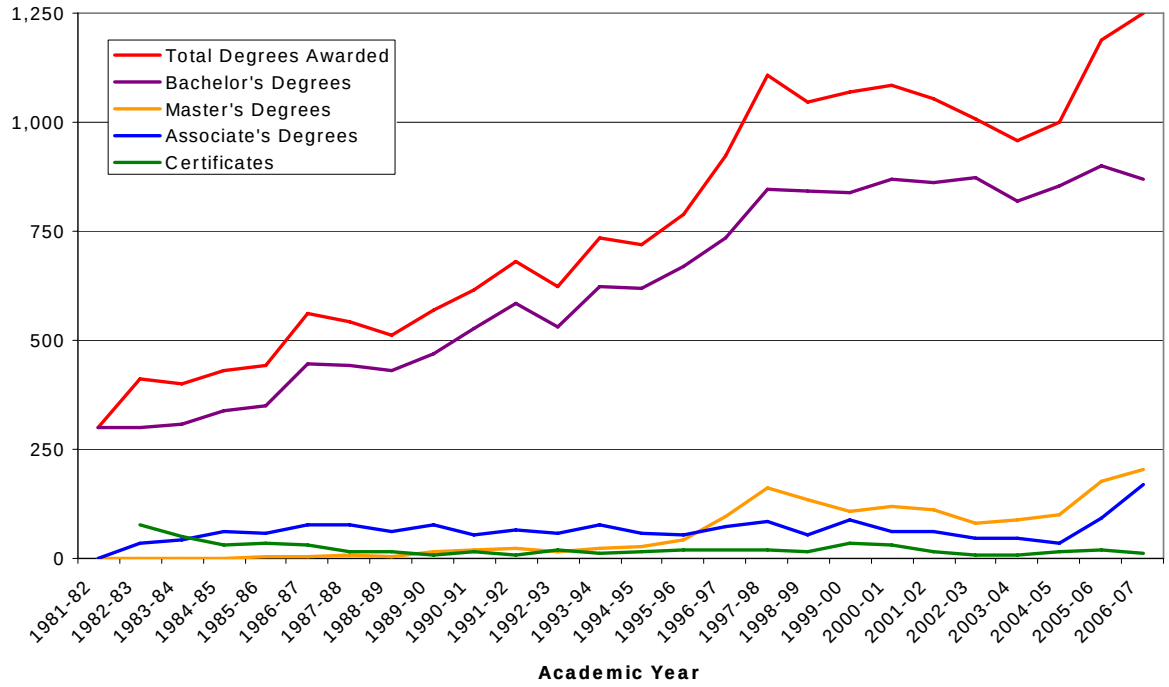
Table 14
Southern Utah University Degrees Awarded by Type and Field of Study, 1990–2007

Field of Study	1989–90	1990–91	1991–92	1992–93	1993–94	1994–95	1995–96	1996–97	1997–98	1998–99	1999–00	2000–01	2001–02	2002–03	2003–04	2004–05	2005–06	2006–07
Certificates																		
Agriculture & Natural Resources	2	3	5	5	5	2	4	6	4	7	4	14				1	3	
Business & Marketing	5	13	4	15	5	2	2	4	8	2	19	11						
Computer & Info Sciences																3		
Engineering & Related Technologies																3	4	5
Other Vocational Studies†						12	15	11	6	5	12	6					3	
Social Sciences & Public Admin.																7	8	5
Total Certificates Awarded	7	16	9	20	10	16	21	21	18	14	35	31	17	7	6	14	18	10
Note: certificates and diplomas greater than one year but less than four years.																		
Associate's Degrees																		
Agriculture & Natural Resources		5	1	6	4	1	3	6	7	1	5	1	2	6	3	2	2	1
Business & Marketing	23	13	14	12	26	13	19	17	14	3	22	14	10	9	2			
Computer & Info Sciences											9	1	2	1	3	1	1	1
Engineering & Related Technologies							8	7	6	5	4			5	6	7	5	4
Home Economics														7	6	5	2	1
Law & Legal Studies									8	2	5	3	1	3	6	7	1	4
Liberal Arts & Sciences/Gen. Studies																	70	148
Other Vocational Studies†	54	34	51	39	47	43	24	45	49	44	43	44	30	9	11	8	10	8
Visual & Performing Arts													17	7	8	3	3	1
Total Associate's Degrees Awarded	77	52	66	57	77	57	54	75	84	55	88	63	62	47	45	33	94	168
Bachelor's Degrees																		
Agriculture & Natural Resources			3	6	6	3	10	6	10	17	12	7	6	15	16	9	11	11
Architecture & Related Studies		4																
Biological Sciences/Life Sciences	19	23	26	21	24	31	36	56	60	51	44	39	45	38	35	53	63	75
Business & Marketing	96	113	102	101	104	89	114	121	165	140	140	134	128	133	119	120	141	135
Communications	32	30	41	37	35	35	40	44	43	61	57	86	71	84	81	77	55	53
Computer & Info Sciences									8	26	35	32	52	42	38	21	22	10
Education	199	219	259	226	267	276	285	270	299	291	305	300	239	305	232	227	203	185
Engineering & Related Technologies	14	11	15	14	11	10	9	12	15	8	14	15	12	9	15	15	19	16
English Language & Literature	8	9	10	9	12	12	13	15	18	21	5	12	28	10	7	15	11	11
Foreign Languages	8	9	9	8	12	13	16	14	20	21	13	17	14	10	9	16	13	14
French (Canadian) Language & Lit.														8	15			
Health Professions														1	4	14	52	86
History																11	17	11
Home Economics		5	4	5	7	9	4	15	16	14	23	23	28	27	26	31	26	37
Mathematics	11	7	6	9	15	13	17	10	6	9	3	1	7	3	6	2	2	6
Other*	14	4	4	7	8	1	5	3	1	9	7	5	15	6	15	13	18	12
Other Vocational Studies†					1	5	15	19	24	40	30	44	44	56	64	45	66	59
Physical Sciences & Science Tech.	5	6	5	6	9	11	15	12	23	5	17	7	15	6	6	18	16	16
Psychology	28	43	33	27	54	42	45	53	39	33	46	57	53	35	49	55	72	50
Social Sciences & Public Admin.	20	24	47	38	37	44	33	56	67	64	56	63	61	46	43	57	56	39
Visual & Performing Arts	16	20	21	17	22	26	14	28	32	32	32	29	44	39	39	55	36	42
Total Bachelor's Degrees Awarded	470	527	585	531	624	620	671	734	846	842	839	871	862	873	819	854	899	868
Master's Degrees																		
Business & Marketing	16	21	22	15	24	26	19	24	35	16	23	26	38	31	32	50	52	57
Communications																		1
Education							25	71	126	119	84	95	73	48	49	46	126	142
Visual & Performing Arts															7	4		4
Total Master's Degrees Awarded	16	21	22	15	24	26	44	95	161	135	107	121	111	79	88	100	178	204

† Includes Personal Services, Vocational Home Economics, Protective Services, Construction Trades, Mechanics & Repairers, Precision Production Trades, Transportation & Materials Moving.
* Includes Library Science, Military Technologies, Multi/Interdisciplinary Studies, and Parks & Recreation.

Source: Utah System of Higher Education data books and National Center for Education Statistics IPEDS Completion Survey.

Exhibit 4
Total Degrees Awarded by Southern Utah University by Type, 1982–2007



Type of Degree	1981–82	1982–83	1990–91	1991–92	1992–93	1993–94	1994–95	1995–96	1996–97	1997–98	1998–99	1999–00	2000–01	2001–02	2002–03	2003–04	2004–05	2005–06	2006–07	Change
Certificates		77	16	9	20	10	16	21	21	18	14	35	31	17	7	6	14	18	10	–87.0%
Associate's Degrees	0	34	52	66	57	77	57	54	75	84	55	88	63	62	47	45	33	94	168	394.1%
Bachelor's Degrees	301	300	527	585	531	624	620	671	734	846	842	839	871	862	873	819	854	899	868	188.4%
Master's Degrees	0	0	21	22	15	24	26	44	95	161	135	107	121	111	79	88	100	178	204	10100.0%
Total Degrees Awarded	301	411	616	682	623	735	719	790	925	1,109	1,046	1,069	1,086	1,052	1,006	958	1,001	1,189	1,250	315.3%

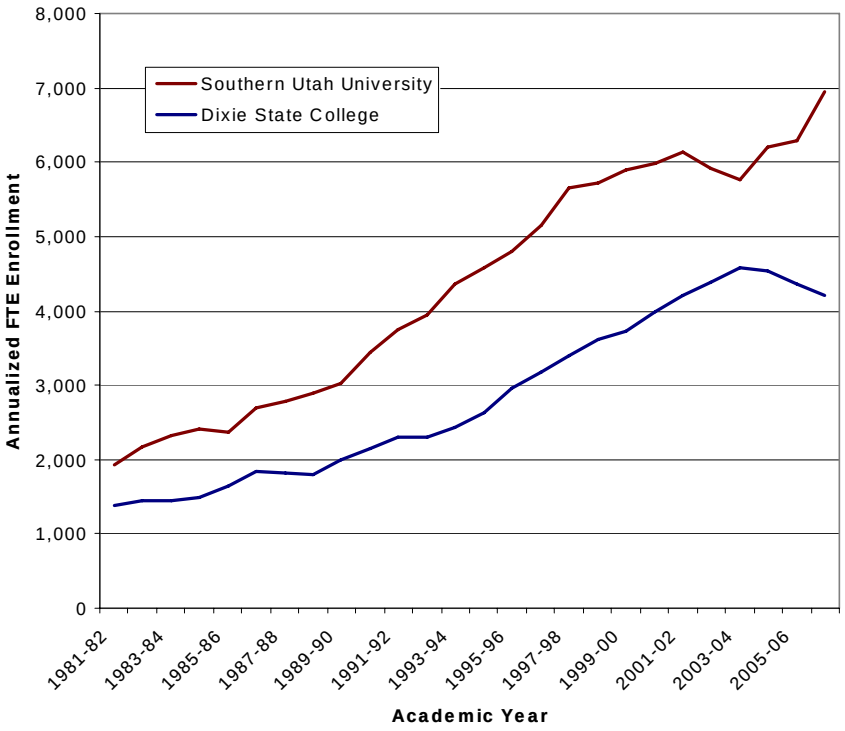
Source: Utah System of Higher Education data books and National Center for Education Statistics IPEDS Completion Survey.

Enrollment

Enrollment has more than tripled at both SUU and Dixie over the last 25 years (Exhibit 5). SUU grew from 1,921 annualized full-time equivalents (budget-related and self-support) in the 1981–82 academic year to 6,937 in 2006–07, with a slight dip in 1985–86 and a larger decline from 2001–02 to 2003–04. This represents an average annual growth rate of 5.3 percent. Dixie's enrollment grew from 1,380 to 4,202 annualized FTEs over the period, with some stagnation from 1986–87 to 1988–89 and from 1991–92 to 1992–93. This represents an average annual growth rate of 4.6 percent.

Enrollment growth at the two institutions is projected to slow from its past pace (Table 15). In fact, both schools are expected to increase enrollment by little more than one-third by the 2020–21 academic year, representing average annual growth rates of just over 2 percent. In contrast, over the 14-year period of 1981–82 to 1995–96, enrollments more than doubled at both schools, with AAGRs of 6.8 percent at SUU and 5.6 percent at Dixie; and they grew by more than three-quarters from 1992–93 to 2006–07, with AAGRs of just over 4 percent.

Exhibit 5
Enrollment at Southern Utah University and Dixie State College, 1982–2007
(budget-related and self-support)



Academic Year	Annualized FTE SUU	Dixie
1981–82	1,921	1,380
1982–83	2,173	1,436
1983–84	2,315	1,449
1984–85	2,410	1,483
1985–86	2,361	1,646
1986–87	2,685	1,843
1987–88	2,779	1,812
1988–89	2,894	1,802
1989–90	3,034	1,992
1990–91	3,439	2,156
1991–92	3,754	2,298
1992–93	3,938	2,299
1993–94	4,352	2,438
1994–95	4,583	2,638
1995–96	4,807	2,964
1996–97	5,153	3,171
1997–98	5,646	3,389
1998–99	5,731	3,607
1999–00	5,896	3,728
2000–01	5,978	3,990
2001–02	6,134	4,212
2002–03	5,911	4,389
2003–04	5,759	4,583
2004–05	6,202	4,542
2005–06	6,300	4,372
2006–07[p]	6,937	4,202
Change	261.1%	204.5%
AAGR	5.3%	4.6%

Source: Utah System of Higher Education data books.

Table 15
Projected Annualized FTE
(budget-related and self-support)

Institution	2010–11	2015–16	2020–21
SUU	6,920	7,800	9,460
Share of Total	5.7%	5.8%	5.8%
Dixie	4,520	4,850	5,640
Share of Total	3.7%	3.6%	3.5%
USHE	121,673	135,402	162,188

Source: Utah System of Higher Education 2007 Data Book.

Personal Income

BEBR obtained historical data on personal income from the Bureau of Economic Analysis at the U.S. Department of Commerce. The series includes the components of personal income, which are given by place of residence, and the components of earnings, which are by place of work. Data for 2006 or later are not yet available.

Personal income comprises net earnings by place of residence; dividends, interest, and rent; and personal current transfer receipts received by the residents of the area under consideration. Net earnings by place of residence equal earnings by place of work less contributions for government social insurance plus a residence adjustment. The residence adjustment is the net inflow of the earnings of interarea commuters. That is, a negative number indicates more earnings are leaving the area with in-commuters from outside than earnings are coming into the area with out-commuters coming home. Dividends, interest, and rent account for what is often referred to as investment income. Personal current transfer receipts are defined as "payments to persons for which no current services are performed." They generally include retirement and disability insurance benefits, medical payments (e.g., Medicare and Medicaid), income maintenance benefits, unemployment insurance benefits, veterans benefits, and federal government grants and loans to students.

Total personal income growth in Iron County averaged 4.4 percent annually from 1970 to 2005, increasing from $179.6 million to $799.1 million, or 345.0 percent (Table 16).[4] Per capita personal income grew at less than one-quarter the rate, 1.0 percent annually, from $14,584 to $20,789. Iron County had not only the slowest per capita income growth, but also the lowest per capita income in the region. Farm income increased an average of 3.8 percent annually over the period, gaining 270.4 percent; Iron and Beaver are the only counties in the region in which farm income grew. However, its share of total personal income fell slightly, from 6.4 percent in 1970 to 5.3 percent in 2005. Net earnings grew almost fourfold, from $136.8 million to $545.0 million, an average annual increase of 4.0 percent. Their share of personal income declined from 76.2 percent to 68.2 percent. Investment income (dividends, interest, and rent) also saw its share of income shrink, from 14.9 percent in 1970 to 13.5 percent in 2005, this despite a 301.1 percent increase over the period. Filling the place of earnings and investment income, personal current transfer receipts grew 821.0 percent over the period, a 6.5 percent average annual rate, more than doubling their share of personal income from 8.9 percent to 18.3 percent. This is likely due to the aging of the population, resulting in more retirees who receive Social Security. From at least 1970 through 1984 the residence adjustment for Iron County was negative; it turned positive in 1985 and has remained so through 2005. There was a net loss of earnings leaving the county with in-commuters until 1985, when resident out-commuters began bringing in more earnings than left.

[4] All figures are adjusted for inflation; dollar amounts are constant 2005 dollars.

Table 16
Components of Personal Income in Iron County, 1970–2005
(thousands of constant 2005 dollars)

	1970	1980	1990	2000	2001	2002	2003	2004	2005	Change
Income by Place of Residence										
Personal income	$179,562	$288,735	$379,823	$633,441	$670,844	$699,579	$707,067	$755,450	$799,104	345.0%
Nonfarm personal income	$168,107	$282,830	$363,066	$618,776	$646,253	$662,265	$667,695	$713,922	$756,673	350.1%
Farm income	$11,455	$5,905	$16,758	$14,665	$24,591	$37,314	$39,372	$41,528	$42,431	270.4%
Per capita personal income (dollars)	$14,584	$16,566	$18,151	$18,646	$19,406	$19,794	$19,824	$20,732	$20,789	42.5%
Derivation of Personal Income										
Earnings by place of work	$146,223	$213,112	$275,925	$453,320	$477,706	$507,792	$515,264	$551,661	$592,060	304.9%
less: Contributions for government social insurance	$8,951	$18,056	$29,165	$49,609	$50,834	$52,883	$53,993	$58,113	$63,778	612.6%
Employee and self-employed contributions for gov't social insurance	$4,671	$8,933	$14,823	$24,988	$25,767	$26,630	$26,997	$28,630	$31,218	568.4%
Employer contributions for government social insurance	$4,280	$9,124	$14,342	$24,621	$25,067	$26,253	$26,996	$29,483	$32,560	660.7%
plus: Adjustment for residence	–$437	–$1,886	$3,031	$8,708	$10,830	$11,097	$12,418	$14,245	$16,683	–3914.4%
equals: Net earnings by place of residence	$136,835	$193,169	$249,791	$412,419	$437,702	$466,005	$473,689	$507,793	$544,965	298.3%
plus: Dividends, interest, and rent	$26,810	$59,281	$69,801	$114,778	$116,980	$108,757	$102,003	$111,212	$107,546	301.1%
plus: Personal current transfer receipts	$15,917	$36,284	$60,231	$106,243	$116,162	$124,816	$131,375	$136,445	$146,593	821.0%
Earnings by Place of Work										
Components of Earnings										
Wage and salary disbursements	$103,605	$152,716	$192,801	$342,495	$341,944	$352,805	$350,205	$371,558	$401,774	287.8%
Supplements to wages and salaries	$10,601	$28,830	$43,351	$77,480	$78,698	$86,606	$93,132	$103,088	$112,059	957.1%
Employer contributions for employee pension and insurance funds	$6,321	$19,706	$29,009	$52,859	$53,632	$60,353	$66,136	$73,605	$79,499	1157.7%
Employer contributions for government social insurance	$4,280	$9,124	$14,342	$24,621	$25,067	$26,253	$26,996	$29,483	$32,560	660.7%
Proprietors' income	$32,017	$31,566	$39,772	$33,345	$57,063	$68,381	$71,927	$77,016	$78,227	144.3%
Farm proprietors' income	$7,966	$1,843	$13,185	$7,013	$17,087	$28,500	$31,687	$33,215	$32,094	302.9%
Nonfarm proprietors' income	$24,050	$29,723	$26,588	$26,333	$39,976	$39,881	$40,240	$43,800	$46,133	91.8%
Earnings by Industry										
Farm earnings	$11,580	$6,070	$17,024	$15,303	$25,213	$37,873	$39,989	$42,125	$43,021	271.5%
Nonfarm earnings	$134,643	$207,042	$258,901	$438,017	$452,493	$469,919	$475,275	$509,536	$549,039	307.8%

Note: Earnings by place of work equals the sum of wage and salary disbursements, supplements to wages and salaries, and proprietors' income.
Source: U.S. Bureau of Economic Analysis.

Retail Sales

Retail sales data indicate the level and direction of consumer activity. Retail sales per capita provide some indication of whether or not there is retail "leakage" from an area; that is, are people leaving the area or going online to do their shopping? If, for example, a county has declining sales per capita while a neighboring county has increasing sales per capita, sales may be "leaking" from the first county to the second.

The Utah State Tax Commission reports gross taxable sales by industry. The earliest year for which complete data are available is 1978, therefore BEBR analyzed changes in retail sales from 1980 to 2006. To remove the effects of inflation, all amounts were converted to constant 2006 dollars.

Iron County (Table 17) is second only to Washington County in total sales growth (205.5 percent), share of regional sales (19.6 percent in 2006), and in retail sales per capita ($9,631 in 2006). Total sales in Iron grew from $136.9 million in 1980 to $418.2 million in 2006. Although the county has the largest share of regional sales outside of Washington County, it has lost market share (to Washington) since 1980, when it captured 35.0 percent of regional sales. Iron's 2006 per capita sales were more than double those in Beaver and Garfield, and $1,000 more than Kane County's. However, per capita sales growth has been modest in Iron County at 23.1 percent over the period.

Retail sales in Iron are fairly well diversified across categories. In 1980, the largest category was motor vehicles and related, which accounted for 27.5 percent of total retail sales. General merchandise, food stores, eating and drinking, and miscellaneous each represented 12–14% of total sales. Building and garden, apparel and accessory, and furniture each captured less than 10 percent of sales. In 2006, general merchandise had doubled its share to become the largest category, accounting for 26.9 percent of retail sales. Building and garden also doubled its share of sales, to 20.0 percent. These were the only two categories to gain market share over the period. Food stores, motor vehicles, and eating and drinking each captured 11–16% of sales in 2006, with the remaining categories accounting for less than 10 percent each. Building and garden stores and general merchandise outlets, which includes Wal-Mart, saw the greatest sales increases, with gains of 575.4 percent and 519.8 percent, respectively.

By way of comparison, 2006 total retail sales along the Wasatch Front were $2.3 billion in Davis County, $11.1 billion in Salt Lake County, $3.9 billion in Utah County, and $1.9 billion in Weber County. Retail sales per capita were $8,155 in Davis, $11,165 in Salt Lake, $8,192 in Utah, and $8,597 in Weber. Iron County's per capita sales of $9,631 fell between those of Weber and Salt Lake counties, while its total sales and population were both about one-fifth of Weber's and only about 4 percent of Salt Lake's.

Table 17
Iron County Taxable Retail Sales by Category, 1980–2006
(thousands of constant 2006 dollars)

	Building & Garden		General Merchandise		Food Stores		Motor Vehicles		Apparel & Accessory		Furniture		Eating & Drinking		Miscellaneous		Total	Share of Region	Per Capita (dollars)
	Amount	Share	Amount	Share	Amount	Share	Amount	Share	Amount	Share	Amount	Share	Amount	Share	Amount	Share			
1980	$12,356.1	9.0%	$18,138.9	13.2%	$18,306.7	13.4%	$37,702.6	27.5%	$5,089.5	3.7%	$8,596.4	6.3%	$19,594.0	14.3%	$17,118.6	12.5%	$136,902.7	35.0%	$7,823
1990	$15,219.2	8.8%	$26,307.2	15.1%	$44,237.8	25.4%	$43,905.5	25.3%	$4,173.2	2.4%	$5,917.4	3.4%	$18,239.1	10.5%	$15,878.4	9.1%	$173,877.8	26.2%	$8,316
2000	$30,829.2	10.8%	$64,693.0	22.6%	$68,422.1	23.9%	$56,007.9	19.6%	$3,252.9	1.1%	$10,639.3	3.7%	$32,224.7	11.3%	$20,343.3	7.1%	$286,412.3	22.1%	$8,404
2001	$26,532.4	9.2%	$78,816.3	27.5%	$54,540.5	19.0%	$58,670.8	20.4%	$3,177.1	1.1%	$9,581.6	3.3%	$34,178.3	11.9%	$21,590.5	7.5%	$287,087.4	21.3%	$8,078
2002	$27,885.8	9.5%	$90,908.4	31.0%	$46,970.2	16.0%	$58,253.8	19.8%	$3,363.0	1.1%	$9,455.7	3.2%	$33,335.9	11.4%	$23,496.1	8.0%	$293,668.9	20.6%	$8,130
2003	$29,848.0	9.9%	$95,176.1	31.7%	$44,206.3	14.7%	$57,443.6	19.1%	$3,766.1	1.3%	$11,400.6	3.8%	$34,231.2	11.4%	$24,318.2	8.1%	$300,390.1	19.8%	$7,998
2004	$42,334.8	12.9%	$99,590.7	30.4%	$44,727.6	13.7%	$60,336.9	18.4%	$4,204.4	1.3%	$12,790.6	3.9%	$37,729.8	11.5%	$25,710.3	7.9%	$327,425.2	18.8%	$8,412
2005	$70,409.6	18.5%	$105,804.4	27.8%	$46,180.9	12.1%	$62,178.8	16.3%	$4,956.6	1.3%	$14,593.7	3.8%	$42,911.3	11.3%	$34,233.2	9.0%	$381,268.4	18.9%	$9,210
2006	$83,451.2	20.0%	$112,416.2	26.9%	$50,085.1	12.0%	$67,426.9	16.1%	$5,190.5	1.2%	$14,602.5	3.5%	$46,058.0	11.0%	$38,966.1	9.3%	$418,196.5	19.6%	$9,631
Change	575.4%		519.8%		173.6%		78.8%		2.0%		69.9%		135.1%		127.6%		205.5%		23.1%

Source: Utah State Tax Commission; Bureau of Economic and Business Research, University of Utah.

Demographic and Employment Projections

The Utah Governor's Office of Planning and Budget (GOPB) produces the official population and employment projections for the state of Utah, its 29 counties, and the multicounty administrative regions. Population projections include births, deaths, and net migration, as well as breakdowns by age and sex. Employment projections include employment by industry and location quotients. The 2005 employment figures do not coincide with the DWS nonagricultural employment numbers because the GOPB uses a different accounting method. The GOPB figures include agricultural employment, proprietors employment (the self-employed), and home workers, whereas the DWS reports only nonagricultural wage and salary employment based on establishment payrolls. For example, in 2005 in Iron County, the GOPB reported total employment of 21,658 whereas the DWS reported total nonagricultural employment of 15,782. The most recent GOPB projections are the 2008 Baseline.

For the current study, BEBR aggregated the GOPB's age-based population projections into three groups: ages 0–17 years (school age), 18–64 years (working age), and 65+ years (retirement age). We include values for 2000, 2005, 2010, 2015, and 2020; the amount and percent of change from 2000 to 2020; and each age group's share of total population in 2000 and in 2020. Employment projections to 2020 are by broad NAICS sector and cover the years 2005, 2010, 2015, and 2020.[5] As with the population projections, we include the amount and percent of change in each sector from 2000 to 2020; and each sector's share of total employment in 2000 and in 2020.

Table 18
Iron County GOPB Projections, 2000–2020

Population

Age Group	2000	2005	2010	2015	2020	2000–2020 Amount	2000–2020 Percent	Shares 2000	Shares 2020
0–17	10,617	12,769	15,950	19,228	21,716	11,099	104.5%	31.2%	31.8%
18–64	20,547	25,246	30,551	34,865	40,166	19,619	95.5%	60.3%	58.8%
65+	2,915	3,382	4,100	5,119	6,433	3,518	120.7%	8.6%	9.4%
Total	34,079	41,397	50,601	59,212	68,315	34,236	100.5%	100%	100%

Employment

NAICS Sector	2005	2010	2015	2020	2005–2020 Amount	2005–2020 Percent	Shares 2005	Shares 2020
Natural Resources and Mining	830	822	769	736	–94	–11.3%	3.8%	2.0%
Construction	1,705	2,108	2,509	2,828	1,123	65.9%	7.9%	7.6%
Manufacturing	1,703	1,855	2,131	2,415	712	41.8%	7.9%	6.5%
Trade, Trans., Utilities	3,778	4,850	5,647	6,128	2,350	62.2%	17.4%	16.4%
Information	180	220	256	280	100	55.6%	0.8%	0.7%
Financial Activity	1,923	2,511	3,061	3,507	1,584	82.4%	8.9%	9.4%
Professional & Business Services	1,880	2,423	2,914	3,289	1,409	74.9%	8.7%	8.8%
Education & Health Services	1,953	2,698	3,464	4,225	2,272	116.3%	9.0%	11.3%
Leisure & Hospitality	2,250	3,042	3,677	4,208	1,958	87.0%	10.4%	11.3%
Other Services	1,207	1,569	1,879	2,155	948	78.5%	5.6%	5.8%
Government	4,249	5,372	6,686	7,620	3,371	79.3%	19.6%	20.4%
Total	21,658	27,470	32,993	37,391	15,733	72.6%	100%	100%

Note: Shading indicates the age group's or sector's share is projected to increase by 2020.
Source: Utah Governor's Office of Planning and Budget, 2008 Baseline.

[5] Employment figures for 2000 are not available in a NAICS-consistent format.

GOPB projections for Iron County show total population doubling, from 34,079 in 2000 to 68,315 in 2020 (Table 18), second only to Washington County in rate of growth. All three age groups are predicted to grow by more than 90 percent. The 65-plus group shows the strongest projected percentage gains (120.7 percent) while the working-age group will increase by "only" 95.5 percent but will experience the largest projected absolute increase (nearly 20,000). The youth and retirement-age groups will both slightly increase their shares of total population from 2000 to 2020, from 31.2 to 31.8 percent and from 8.6 to 9.4 percent, respectively; the working-age group's share is projected to decline slightly, from 60.3 to 58.8 percent.

Employment projections for Iron County predict growth in all sectors except natural resources and mining, which is expected to lose 94 jobs or 11.3 percent. Total employment is projected to increase by more than 15,000 jobs, or 72.6 percent, from 2005 to 2020. The fastest growing sectors are expected to be education and health services (116.3 percent), leisure and hospitality (87.0 percent), financial activity (82.4 percent), government (79.3 percent), and other services (78.5 percent). The largest absolute gains are projected in government (3,371 jobs), trade, transportation, and utilities (2,350), education and health services (2,272), and leisure and hospitality (1,958). The top four industries by employment share in 2005 were government (19.6 percent), trade, transportation, and utilities (17.4 percent), leisure and hospitality (10.4 percent), and education and health services (9.0 percent). By 2020 the top two are expected to remain the same, though their shares will have changed somewhat. Government is expected to increase its share to 20.4 percent of total employment, and trade, transportation, and utilities will have declined to 16.4 percent. Education and health services, and leisure and hospitality will be tied for third at 11.3 percent of total employment each, though there is projected to be 13 more jobs in the former sector than in the latter.