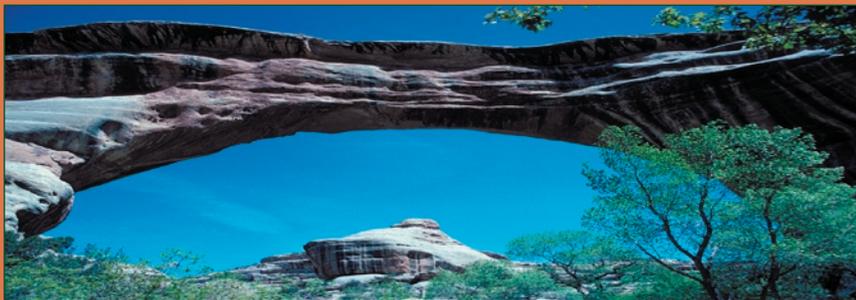


# Landscapes of Opportunity

The Economic Influence of National Parks in Southeast Utah



National Parks Conservation Association<sup>®</sup>  
*Protecting Our National Parks for Future Generations<sup>®</sup>*

April 2009

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*Cover Photos (clockwise from upper left)*

Green River overlook, Canyonlands National Park; Delicate Arch, Arches National  
Park; Square Tower, Hovenweep National Monument; Sipapu Bridge, Natural Bridges  
National Monument. All photos courtesy National Park Service.



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Since 1919, the nonpartisan National Parks Conservation Association has been the leading voice of the American people in protecting and enhancing our National Park System. NPCA, its members, and partners work together to protect the park system and preserve our nation's natural, historical, and cultural heritage for generations to come.



### National Parks Conservation Association® *Protecting Our National Parks for Future Generations®*

With expansive natural beauty and palpable cultural history, southeast Utah's national parks and monuments inspire awe among more than a million visitors each year. Arches and Canyonlands national parks and Hovenweep and Natural Bridges national monuments convey a world-class stature to some of Utah's least-populated terrain.

Visitors from around the world seek out these parks—for recreation and learning, memorable times with family and friends, a glimpse into the past, and a rejuvenating connection with nature. For residents of San Juan and Grand counties, these parks are right in the backyard. And equally close at hand are the benefits, challenges, and opportunities that come with being a national park neighbor.

In 2008, the National Parks Conservation Association (NPCA) commissioned a study that helps describe and define the scope of our national parks' economic influence on southeast Utah. This region has known both boom times and periods of economic starkness. But, as this report suggests, times are changing and the parks are part of an emerging picture of greater stability and slow-but-steady growth. Global economic shifts filtering through this region broaden the value of the parks to local communities.

This *Landscapes of Opportunity* report offers a snapshot of the economic relationship, based on interviews with community leaders and business owners and existing economic data. Numbers from different data sources and models do not always agree, nor provide a complete picture. Where there are inconsistencies and gaps, we have tried to identify them and offer explanation.

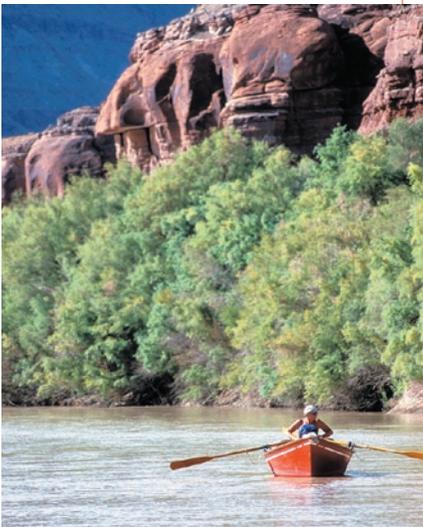
The trends are clear, and they make it apparent that our national parks are indeed “landscapes of opportunity.” This report details a substantial economic benefit from the parks and suggests that southeast Utah communities possess a particular advantage shared by a relatively small number of western communities—the advantage of proximity to national parks. It further suggests outstanding opportunities for San Juan and Grand county communities to leverage that advantage for sustained economic success.

This report offers valuable insight to fuel the ongoing process of defining community aspirations and directing the course of growth and development. As community assets and national treasures, southeast Utah's national parks require a standard of stewardship that maintains the value of this extraordinary place for our children and grandchildren. I hope this report and the dialogue that ensues are further steps in securing this promising future.

David Nimkin

Southwest Regional Director  
National Parks Conservation Association  
Salt Lake City, Utah

*National parks contribute to economic vitality and diversity. Isolated, rural counties like Grand and San Juan benefit from proximity to parks.*



Southeastern Utah's national parks and monuments attract recreationists from nearby communities and around the world.

Dory on the Colorado River, Canyonlands National Park (National Park Service photo)

In 2006, the National Parks Conservation Association (NPCA) commissioned a survey of the U.S. National Park System and its contributions to the American economy. The findings were striking: Every tax dollar spent on America's national parks generates at least four dollars in quantifiable value to the public. America's national parks support \$13.3 billion in local economic activity and more than 250,000 private-sector jobs, fueling economic growth in nearby communities that typically outpaces growth in their respective states. (NPCA, 2006)

In 2008, taking its cue from this larger analysis, NPCA commissioned an examination of the economic influence of national park lands in Utah's Grand and San Juan counties. Southeastern Utah's park lands include Canyonlands and Arches national parks and Hovenweep and Natural Bridges national monuments.

This report presents findings from that analysis, to help inform community discussions and decisions about the region's economic future.

## Understanding Local Economies, Landscapes, and Parks

Drawing on economic data compiled by state and federal agencies, interviews with local residents and leaders, and an analysis of economic performance among similar counties in the west, this report outlines three findings:

### ■ Finding 1: Parks attract people and activity.

National parks have helped put southeast Utah on the map, drawing visitors from across the United States and around the world. These visitors have energized local economies, supporting job and income growth that have filled gaps left by the decline of the mining industry during the 1980s.

### ■ Finding 2: Parks lend economic diversity and stability.

Across the west, proximity to national parks is linked to economic vitality and diversity. In southeast Utah, Park Service jobs and spending add value to local economies. Significant increases in park visitation have helped fuel the expansion of the region's tax receipts and greater economic stability.

### ■ Finding 3: Parks provide an advantage in an increasingly footloose economy.

The attractiveness of communities and their surroundings has become an economic advantage. National and global trends, improvements in communication technology that make it easier for people to live and work where they want, and the growth of "transportable" non-labor sources of income drive this dynamic. Isolated rural counties like Grand and San Juan benefit from the influx of new residents, businesses, economic activity, and tax revenue that parks can help draw.

## Communities, Parks, and the Future

*Landscapes of Opportunity: The Economic Influence of National Parks in Southeast Utah* concludes that the value of Arches, Canyonlands, Natural Bridges, and Hovenweep to local communities goes well beyond the production of iconic images for tourism websites. The final section of this report identifies opportunities for leveraging proximity to the parks to create more economic success for area residents while maintaining the landscape that makes this region so attractive.

## A Landscape with Few Peers

In a region blessed with spectacular natural settings, Canyonlands and Arches national parks are centerpieces. These parks put Monticello, Blanding, Moab, and the other towns in San Juan and Grand counties in the company of relatively few communities across the western United States, whose residents share easy access to some of America's most treasured areas. Southeastern Utah's national parks and monuments anchor this grand region, fitting easily in the company of iconic and dramatic landscapes ranging from Yosemite's towering granite and mountain meadows to Yellowstone's geysers and roving bison.

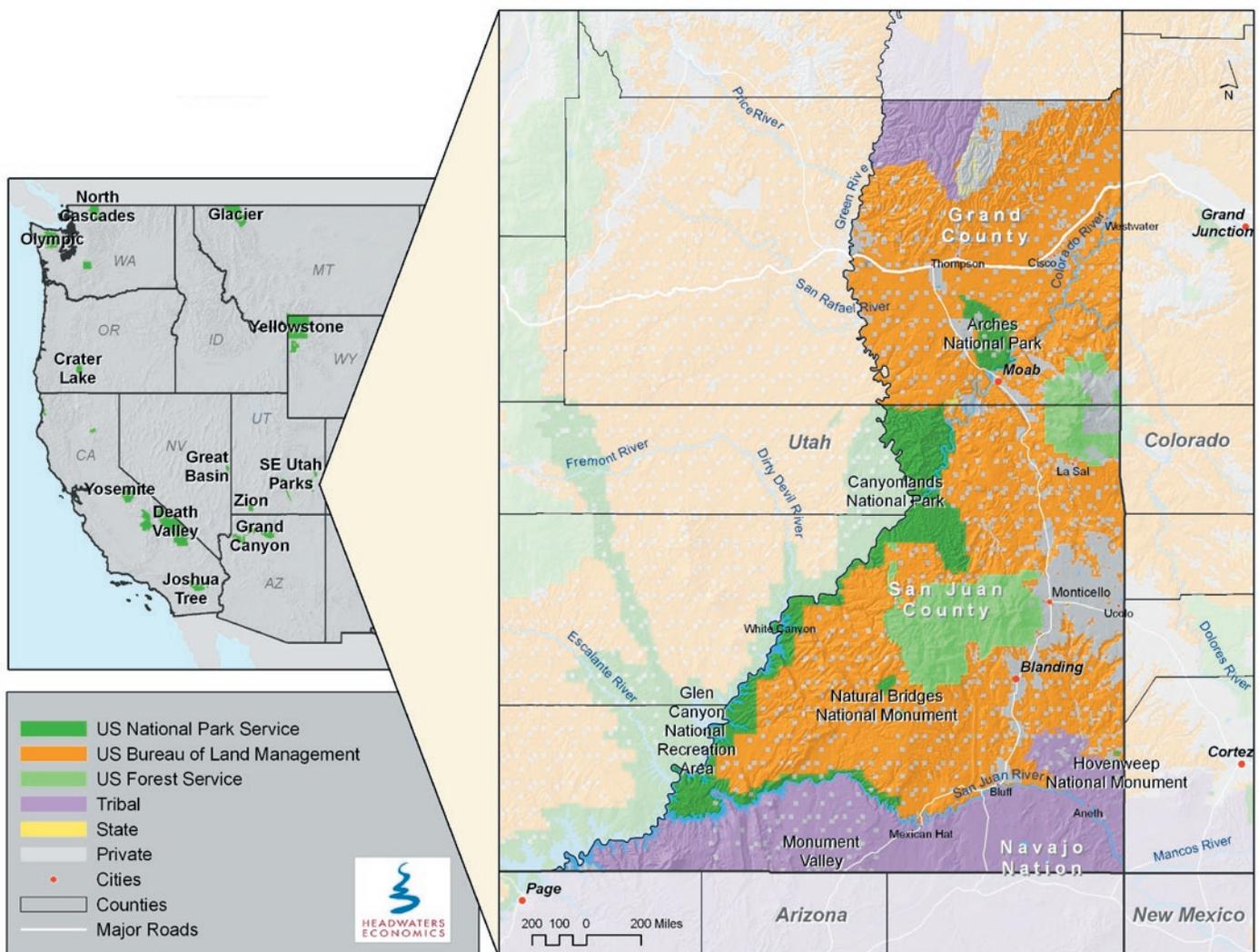
Like other communities near national parks, Grand and San Juan counties enjoy significant opportunities for broadening and stabilizing their economies based on the good fortune of proximity to these public assets.



This region's dramatic vistas fit easily in the company of the west's most iconic landscapes.

Mesa Arch, Canyonlands National Park (National Park Service photo)

Figure 1: Grand and San Juan Counties



Map: Patty Gude, Headwaters Economics

## Finding I — Key Points

- Parks attract visitors to the region in growing numbers.
- Visitor-related economic activity is growing and important in local communities.
- Across the west, proximity to national parks helps communities attract new residents.



**Ken Davey, Moab**  
Economic Development  
Specialist

“Our national parks really put us on the map for visitors. The great thing for us is that, even though they are so well-recognized around the world and such an important draw, the parks are only part of our landscape. People come here because of Arches and Canyonlands and specific activities like mountain biking. While they are here, they find other things to do that might bring them back to the area time after time.”

## Parks attract people and activity.

When searching for a recognizable image to use in travel promotion, Moab Area Travel Council director of tourism Marian DeLay often turns to an old standby: Delicate Arch. In a region full of incredible landforms and cultural relics, Delicate Arch stands out as an icon. The national parks feature and protect the region’s natural and early cultural heritage, says Delay, and are magnets for visitors.

The parks are treasured by area residents, too. “Canyonlands is the crown jewel of San Juan County,” noted Bill Boyle, publisher of the *San Juan County Record*. Boyle grew up in San Juan County. Since moving back home, he has observed a community proud of its surroundings. “You can’t match the setting here. It’s spectacular, and it’s what a lot of people who grew up here and moved away identify with when they come back.”

### Parks Attract Visitors

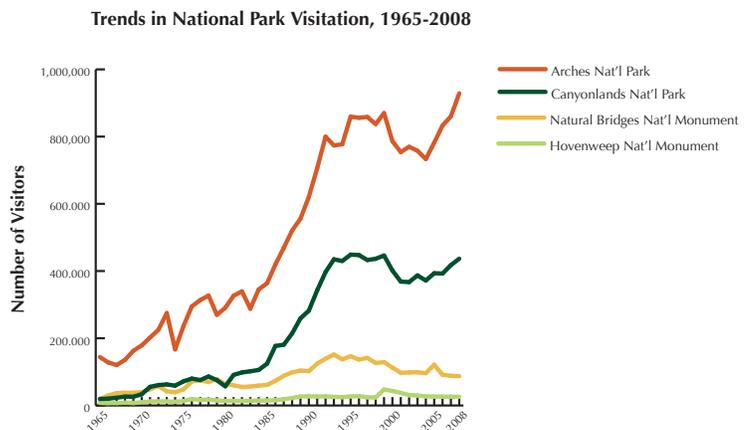
In 42 years as a tour operator in the region, Tag-A-Long Expeditions owner Bob Jones has seen the travel industry blossom. “The parks really put this area on the map,” Jones noted. “They give us a world-class status. There is a big difference between having the status of national parks and just having ‘pretty places’ when you are trying to capture the attention of the international market.”

Arches and Canyonlands are preeminent attractions in Grand and San Juan counties, drawing some 1.2 million visitors a year. (See Figure 2.) Three-quarters of visitors surveyed at Arches National Park reported that visiting Arches was their primary reason for traveling to Moab. Natural Bridges and Hovenweep provide additional attractions for travelers. Though not a national park, Monument Valley Navajo Tribal Park is another important draw, hosting some 500,000 visitors annually.

### Visitors Create Economic Activity

Dramatic increases in park visitation through the 1980s and into the 1990s helped create economic activity that filled gaps left by the mining industry. In 2007,

**Figure 2 National Park Visitation Trends**



Source: National Park Service

National park visitation provides a base of tourist activity in San Juan and Grand counties. Travelers provide a reliable and growing stream of spending and jobs in the two counties. (Source: National Park Service)

travelers spent an estimated \$31 million in San Juan County. In Grand County, that figure approached \$107 million. (Utah Office of Tourism, 2008)

At least one in five jobs in Grand County is travel and tourism related, as is about one in eight jobs in San Juan County.<sup>†</sup> Between 1998 and 2006, the number of travel-related jobs grew by 27 percent in the two counties, while employment in other sectors of the economy grew by only five percent. (Headwaters Economics analysis drawn from U.S. Census County Business Patterns data)

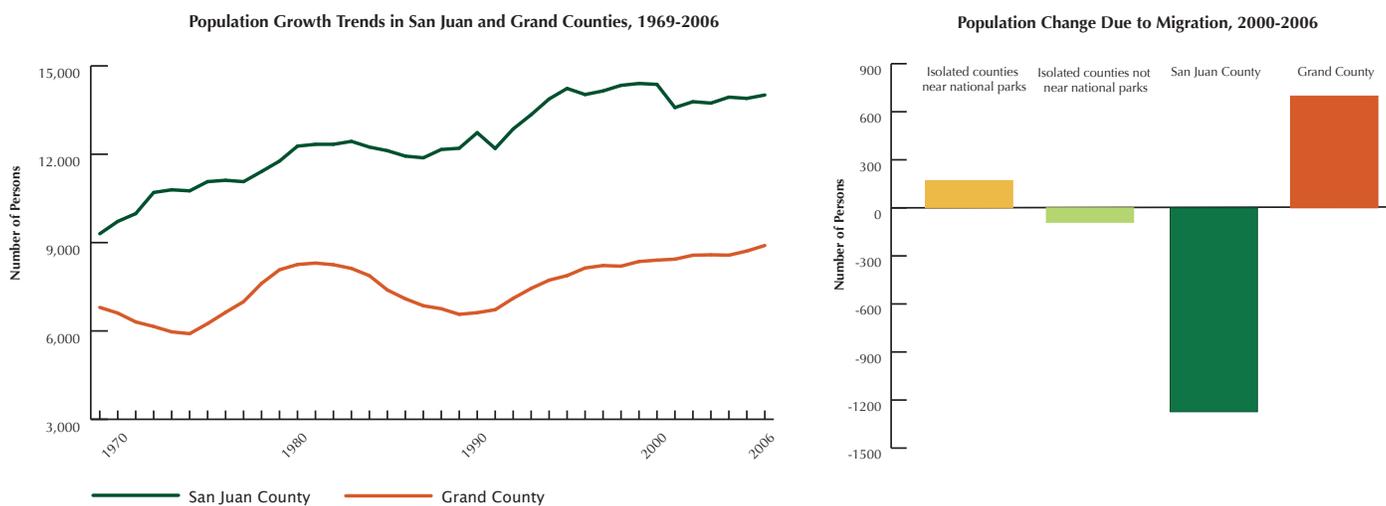
### National Parks Can Help Attract New Residents

Local business and community leaders note that many visitors return time and again. Some visitors move to the area as seasonal or year-round residents. In recent years, Grand County has seen strong net in-migration (more people moving to the county than moving away), while San Juan County has lost residents as they have moved to other counties. Interviews suggest that small numbers of newcomers are moving into San Juan County. This influx is masked by large numbers of people moving away, including from the Navajo Nation. (See Figure 3, p. 5.)

Across the west, isolated rural counties that include national parks tend to benefit from net in-migration, while similar counties without national parks tend to have net out-migration as more people move away than move into the county.

*The two counties' populations are growing for different reasons. Newcomers are fueling much of Grand County's growth. In San Juan County, growth is fueled by a high birth rate. More people move out of the county than move into it.*

**Figure 3 Population Growth Trends and the Influence of Migration**

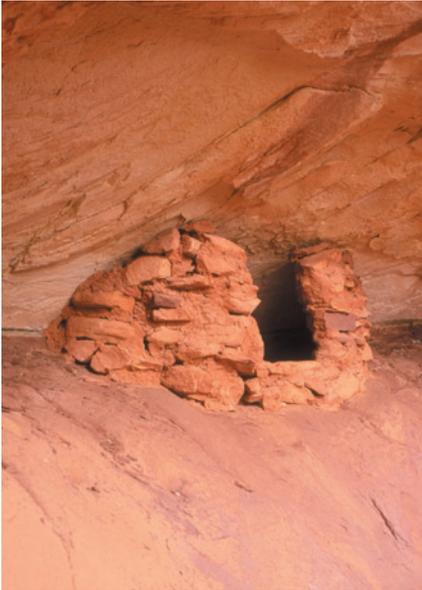


The chart on the left shows that both counties have gained population since 1969. Grand County's population has recovered from the last exodus of residents, spurred by the decline of mining.

The chart on the right suggests that the two counties' populations are growing for different reasons. That chart illustrates net migration—the difference between the number of people moving to and from a county. Isolated rural counties across the west like Grand and San Juan counties that are near national parks, tend to gain population as more people move in than move away. By contrast, from 2000-2006, more people moved away from similar counties that are not near national parks than moved into these counties. During that period, migration accounted for some 700 new residents in Grand County, while in San Juan County, over 1,200 more people moved away than moved into the county. San Juan County's population is growing because of a high birth rate. (See a description of the analysis of economic peers on page 12.)

Download detailed economic profiles of San Juan and Grand counties from the Headwaters Economics website at <http://www.headwaterseconomics.org/eps/>. (Source for both charts: Headwaters Economics analysis based on U.S. Census data)

<sup>†</sup> The proportion of travel-related jobs may be greater, as the figures on which this analysis is based do not include government jobs and the self-employed.



Evidence of a long and rich cultural heritage is found across the landscape.

Ancestral Puebloan granary, Canyonlands National Park (National Park Service photo)

Studies from other regions suggest that these migrants may play an important role in the region's economy. In a survey of business owners in three Montana counties bordering Yellowstone National Park, for example, 40 percent reported first traveling to Montana for vacation or business, and then deciding to move to the area. (Snepenger, 1995)

In 2004, the Sonoran Institute analyzed factors related to economic growth in western counties. This analysis found that income growth in isolated rural counties is slower in counties with a larger percentage of residents born in-state. In other words, newcomers help fuel economic growth. (Sonoran Institute, 2004)

## A Tour of National Park System Sites in Grand and San Juan Counties

**Arches National Park** Next-door to Moab, at the western edge of Grand County, Arches was created by Congress in 1929. The iconic Delicate Arch represents more than 2,000 similar sandstone formations. The park's high-desert ecosystem supports numerous endemic species. Rock inscriptions from ancient Pueblo inhabitants dot the landscape. Arches is largely accessible by road, and scenic driving is by far the most popular activity for park visitors.

**Canyonlands National Park** Spanning three counties, Canyonlands runs along the western edge of San Juan County, proximate to Monticello and Blanding. The park was established in 1964. Its three districts—Island in the Sky, Needles, and the Maze—represent different landscapes and varied recreational opportunities. The park has few roads and contains significant archaeological sites that belie the movements of Native American inhabitants, European settlers, and local ranchers and miners drawn to the Green and the Colorado rivers.

**Hovenweep National Monument** Comprised of six prehistoric, Puebloan-era villages, Hovenweep is spread over a twenty-mile expanse of mesa tops and canyons along the Utah-Colorado state line.

**Natural Bridges National Monument** In San Juan County, Natural Bridges protects three of the world's largest natural land bridges, a tree-covered mesa and deep sandstone canyons. With one of the darkest night skies in the country, Natural Bridges has been designated the world's first International Dark Sky Park.



Colorado River, La Sal Mountains (Howard D Terry photo)

## Parks lend economic diversity and stability.

“How does Arches affect Moab?” one lifelong Moab resident asked, rhetorically. “It means that now we don’t have to leave to have a job. Back in the ‘80s, when mining went south, we had to get out if we wanted to have work.” In Grand and San Juan counties, tourism and related employment go through seasonal fluctuations and periodic downturns, but overall, tourism has consistently expanded in the last few decades.

San Juan County economic development director, Charlie DeLorme, notes, “Tourism does ebb and flow in response to world events like 9/11 and news reports about fugitives in the Four Corners region. But despite fluctuations, tourism and travel have claimed a growing share of the economy.”

### Economic Impact of Visitor Spending and Park Service Jobs

In 2006, over 1.2 million visitors came to Arches and Canyonlands national parks, spending some \$99 million during their visits. Economist Daniel Stynes estimates that this spending supported 2,315 jobs, resulting in nearly \$37 million in personal income. This spending generated an estimated \$57.6 million in additional benefit to the local economy, referred to as “value added.” (See Figure 4.)

### Finding 2 — Key Points

- Parks and their visitors support jobs and income, and create other benefits in local economies.
- Local tax revenues from visitor spending are an important resource for communities.
- Mirroring larger trends, the economies of Grand and San Juan counties have changed dramatically. Non-labor income from investments and retirement and the government and services/professional sectors are leading a slow, steady growth and lending economic stability.

**Figure 4 Economic Impacts of Arches and Canyonlands Visitor Spending and National Park Service Jobs, 2006**

National park visitor spending and National Park Service payroll for employees create local economic benefits. Estimates of these impacts include both direct effects (e.g., businesses selling goods and services directly to park visitors) and secondary effects (e.g., household spending of income, and sales to related businesses in the local region).

National Park	Visitors		Spending	Local Impact of Visitor Spending		
	Recreation Visits (individuals)	Overnight Stays (parties)		Non-local visitors*	Jobs**	Personal Income***
Arches	833,049	51,855	\$80,439,000	1,949	\$30,318,000	\$47,839,000
Canyonlands	392,537	87,422	\$18,353,000	366	\$6,372,000	\$9,852,000
Combined	1,225,586	139,277	\$98,972,000	2,315	\$36,690,000	\$57,691,000

National Park	NPS Payroll*****			Local Impact of NPS Payroll Spending		
	Salary	Payroll Benefits	NPS Jobs	Jobs	Personal Income	Value Added
Arches	\$845,601	\$247,113	22	29	\$1,262,000	\$1,389,000
Canyonlands	\$4,539,442	\$1,303,648	118	155	\$6,751,000	\$7,432,000
Combined	\$5,385,043	\$1,550,761	140	184	\$8,013,000	\$8,821,000

\*Visitor spending is estimated using spending averages from park visitor surveys and local area economic multipliers. This method yields higher per-person spending estimates for park visitors than the Utah state spending estimates for all travelers in Grand and San Juan counties (reported on p. 5). Because of differences in methodology, the two sets of estimates do not yield a reliable comparison.

\*\*Includes full-time and part-time jobs. Seasonal positions adjusted to an annual basis.

\*\*\*Covers wages and salaries, including income of sole proprietors and payroll benefits.

\*\*\*\* “Value Added” is the sum of personal income, profits and rents of private firms, and indirect business taxes accruing to regional/local government. This does not account for Park Service purchases from local businesses.

\*\*\*\*\*Payroll figures for Canyonlands include regional park staff, who have responsibility for all four Park Service units. Visitation and separate staffing at Hovenweep and Natural Bridges were not considered in this study.

Source: Stynes, 2007



**Lisa Church, Moab**  
Editor, Moab *Times-Independent*

“The parks have value regardless of the proportion of the economy they represent. When visitor numbers are down, tourism in general is down and that’s a big deal in Moab. The parks have helped build an economy here that didn’t exist before, and they are integral to the effort to expand beyond our focus on travel and tourism.”



**Jim Hook, Bluff**  
Owner, Recapture Lodge

“We’re not a gateway town, which is great for me because we don’t really want McDonald’s and the things that come with that kind of development. People find us because we’re off the beaten path.”

National parks also contribute some 140 government jobs to the local economy. These jobs provide \$5.4 million in salaries and \$1.6 million in payroll benefits for Arches and Canyonlands alone. Stynes estimates that the total impact of Park Service payroll spending on the local economy, including the secondary effects of park staff spending their salaries locally, is \$8.8 million.

National park visitors account for a large share of total tourism spending in the two counties. Further, Stynes’ analysis suggests that park visitation and payroll expenditures directly and indirectly support 2,500 jobs and generate more than 10 percent of the \$409 million total personal income of the residents of Grand and San Juan counties. (Stynes, 2007; 2006 total personal income from Headwaters Economics analysis based on Bureau of Economic Analysis REIS 2006)

### Tourist Tax Revenues Provide Local Government Support

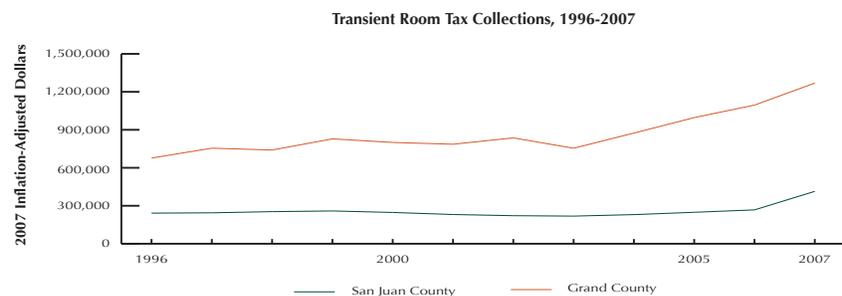
Communities in Grand and San Juan counties collect a transient room tax on lodging. In Utah, this tax rate varies from county to county, and some municipalities (including Blanding, Monticello, and Moab) levy an additional percentage. These tax receipts provide an expanding pool of money (see Figure 5) to fund tourism marketing and tourism-related facilities, and portions of receipts are directed to county and municipal general funds to help cover costs associated with tourism (e.g., infrastructure maintenance).

Some local leaders believe that tax-funded support for marketing is essential for the continued success of the area’s travel industry. San Juan County’s Charlie DeLorme, points out that tourist spending across Utah grew by 28 percent in the four years since Utah began an aggressive tourism marketing effort. In San Juan County, he said, traveler spending in 2008 was up 26 percent over 2007. Others believe that some of the tax receipts now spent on promoting tourism could be better utilized shoring up and improving infrastructure used by travelers.

In part because of the global appeal of national parks, Grand and San Juan counties draw both domestic and international tourists. Marketing efforts can shift with trends such as the price of gasoline and the strength of the dollar overseas, targeting markets that are most likely to respond.

In 2007, visitors to the two counties paid more than \$3 million in local sales tax and taxes on lodging, rental cars, and restaurant meals. (Utah Office of Tourism, 2006)

**Figure 5 Growth in Transient Room Tax Collections**



Funds from the transient room tax (sometimes called a bed tax or lodging tax) support tourism marketing and facilities, and help localities keep up with infrastructure and other costs associated with a tourism area. (Source: Utah Travel and Tourism, 2006)

## Economic Change Lends Stability and Underpins Growth

Across the west, proximity to national parks appears to be an advantage for the development of diverse economies. Using the structure of the U.S. economy as a benchmark, isolated rural counties near national parks are less specialized than their non-park peers. San Juan County is more diverse than its national park peers as a whole, while Grand County is more specialized, having traded mining dependence for tourism dependence. (See Figure 6.) A diverse economy tends to be stronger than a specialized economy. Downturns in one sector are better buffered if there are many strong sectors than where there is heavy dependence on one industry.

Since 1970, the economies of Grand and San Juan counties have changed significantly. After a dramatic mining boom and subsequent decline in the mid-1980s, other growing income sources have filled the gap. In both counties, economic transition and expansion have been led by the services and professional sector, government, and non-labor income. (See Figure 7.) These income sources have proven to be more stable than mining. And, while travel-related employment fluctuates some from year to year, it has also proven to be more stable than mining, with much smaller year-to-year changes. Notably, the overall economy has grown slowly, but steadily, in recent years. Dramatic growth in non-labor income is likely behind this growth and stability. (See Figures 7 and 8.)

Construction, manufacturing, and mining continue to play relatively minor roles, rounding out the local economy. Although it varies from year to year, agriculture's contribution is negligible, sometimes generating a small net loss in personal income. (Headwaters Economics analysis)

Figure 6 Employment Diversity in County Economies, 2006

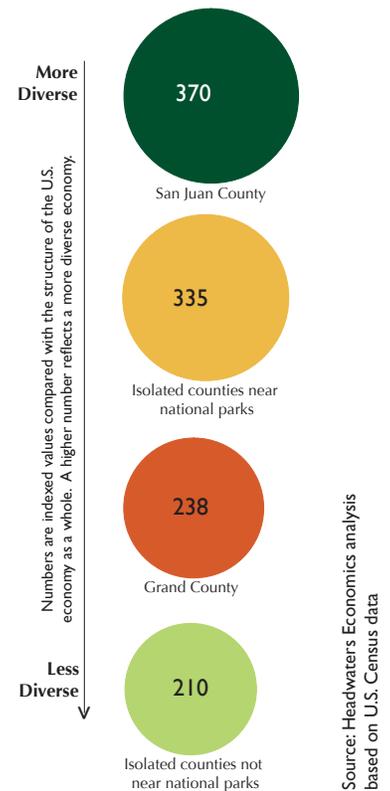
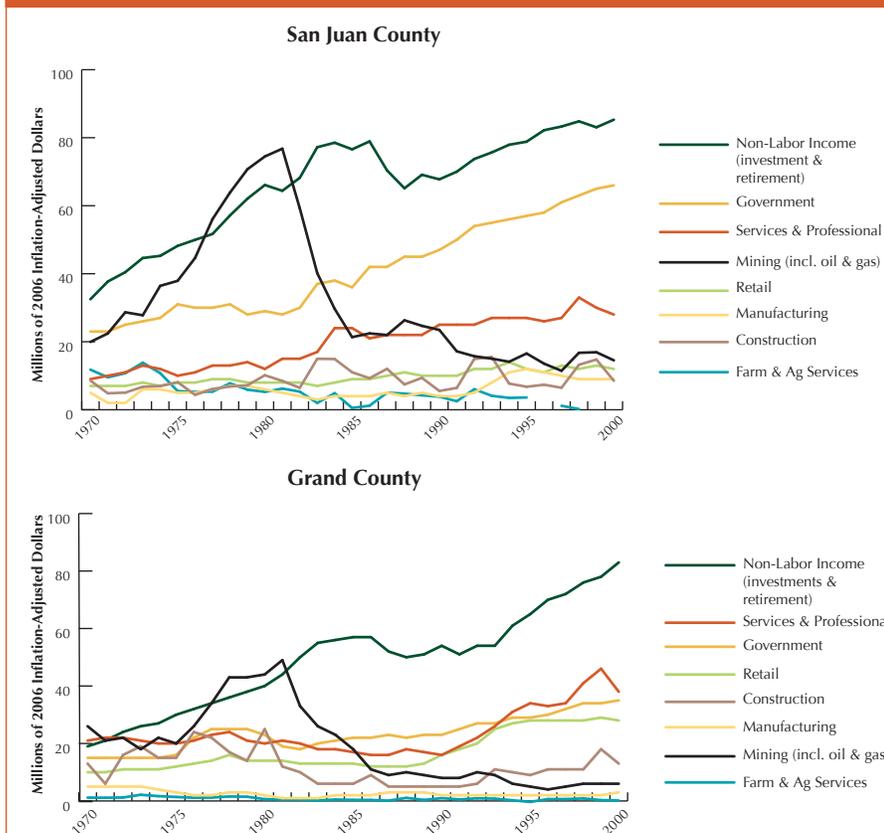


Figure 7 Income by Source or Industry Sector, 1970-2000



Personal income growth has been led by non-labor income (payments such as dividends, interest, rent, or government payments such as Medicare or Social Security) in both Grand and San Juan counties. Government has also become more important, although more so in San Juan County than in Grand. The services and professional sector is growing and important in both counties.

In both counties, mining steeply declined during the early 1980s. Personal income has recovered in both county economies, with the sectors listed above leading the way in filling gaps left by the mining decline.

In 2001, the federal government changed the classification system it uses to break down industry sectors. To provide an historical perspective, these graphs use the earlier classification scheme, and thus cannot be extended beyond 2000. The charts in Figure 8 on p. 10 suggest that the trends established during the early 1980s have continued. Large shares of personal income are accounted for by non-labor income, government, various types of services. In Grand County, travel-related sectors provide a significant share of personal income. (Source: Headwaters Economics analysis using data from Bureau of Economic Analysis REIS 2006)



Hovenweep National Monument is among the region's off-the-beaten-path attractions.

(Howard D Terry photo)

“We live in a beautiful place with a small-town life that we love. The same things that can help attract new economic activity can also allow people who live here and our kids to do better economically.

“When Bluff first got DSL Internet service, there was plenty of bandwidth. There was a gal who visited, fell in love with Bluff, and bought a house here. She worked remotely for a French graphics firm, using high-speed Internet to work with her clients. As the number of DSL subscribers grew, bandwidth shrank and she had to move away because she could no longer transfer the large files she produced.

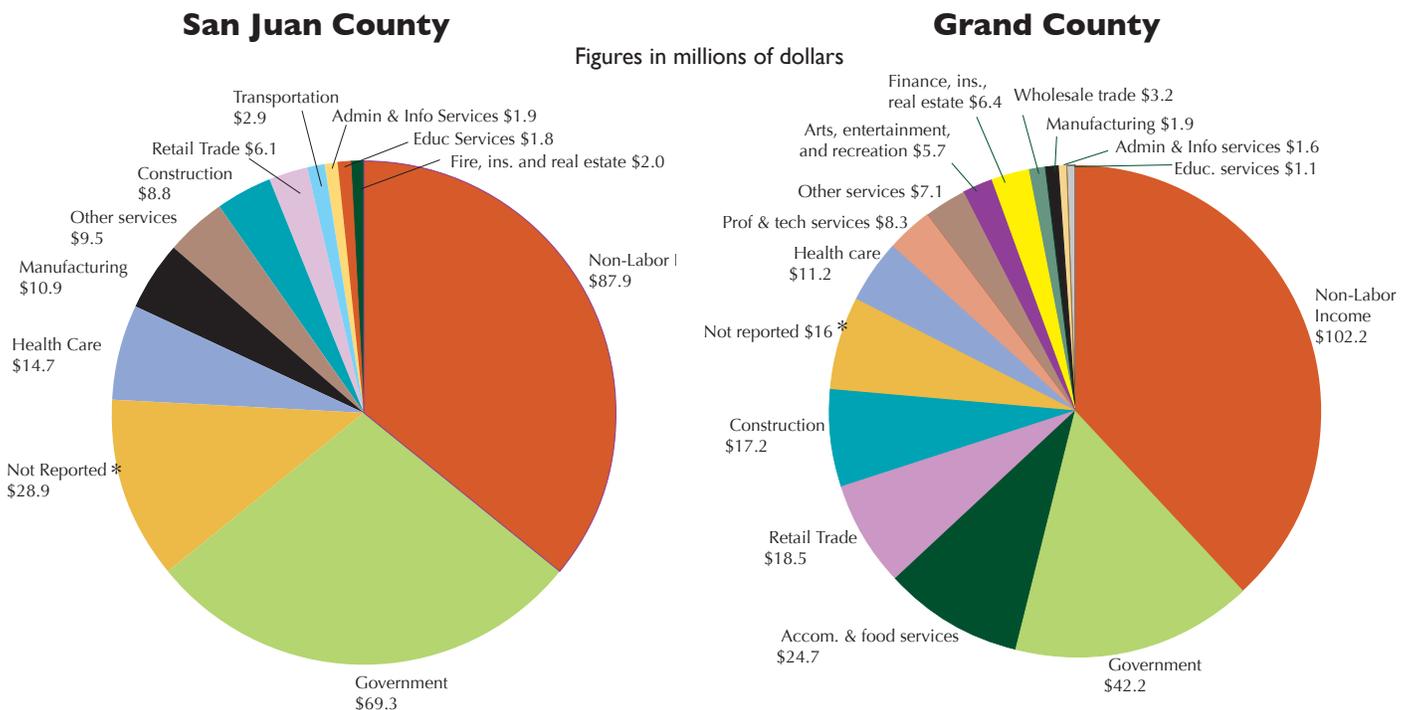
“Because we’re so remote, we really have to capitalize on what we have. That means investing in infrastructure, providing air service, and strategically setting our communities apart so we can draw people who are interested in the community character and quality of life we enjoy here.”



**Charlie DeLorme,**  
Monticello

San Juan County Economic  
Development Director

**Figure 8 Income by Source or Industry Sector, 2006**



The “not reported” category includes industries subject to disclosure restrictions during 2006. The U.S. Department of Commerce suppresses data to avoid disclosure of confidential information in industries represented by one or only a few companies. Generally, the smaller the geographic level of analysis and the smaller the population of the county, the higher the chances for disclosure restrictions.

“Not reported” in San Juan County: Forestry, fishing, related activities; Mining; Utilities; Wholesale trade; Professional and technical services; Management of companies and enterprises; Arts, entertainment, and recreation; Accommodation and food services

“Not reported” in Grand County: Forestry, fishing, related activities; Mining; Utilities; Transportation and warehousing; Management of companies and enterprises; Administrative and waste services

Source: Headwaters Economics analysis based on U.S Department of Commerce data

### **Parks provide an advantage in an increasingly footloose economy.**

According to Ken Davey, the most important role of the economic development office he heads in Moab is to attract people, not businesses. “We’re isolated and remote, and it doesn’t work too well to try to attract basic industry here. We don’t have what they need. I do think we can attract and hold people who enjoy what’s special about Moab—the solitude, the desert, the natural beauty, the recreation. Those people will have the talent to build businesses that work here.”

Instead of “chasing smokestacks,” Davey suggests that Grand and San Juan counties play on their strengths and build an economic development strategy around new and long-time residents who are drawn to the area’s quality of life.

#### **The Economy of the Future has Already Started**

The state of Utah’s employment projections predict that growth in San Juan and Grand counties will likely be concentrated in services, trade and proprietorships. (Utah Governor’s Office of Planning and Budget, 2002) National and global shifts toward a more services-oriented economy continue to filter through this region. Improvements in communication technology make it easier for people to live and work where they want. At the same time, “transportable” non-labor sources of income, such as dividends, interest, rent, and age-related payments such as retirement, have become more important.

All of these shifts place a premium on a community’s attractiveness and its ability to draw and retain residents. Research conducted in other areas suggests that natural beauty, public lands, outdoor recreation, and small, friendly communities top the list of what long-time residents and newcomers alike appreciate.

#### **National Parks are Linked with Economic Vitality**

National parks can be part of the picture of economic vitality into the future for counties like Grand and San Juan that are at an economic disadvantage because of their isolation. A 2004 study by the Sonoran Institute found that isolated, rural counties that include protected public lands fare better economically than similar counties without protected public lands. From 1970 to 2000, counties with protected public lands enjoyed 60 percent greater growth in real per-capita income than their peers with no protected public lands. (Sonoran Institute, 2004) See Figure 9 (p. 12) for additional detail on advantages that park proximity confers.

#### **Meeting Challenges**

The peer analysis in Figure 9 suggests that concentrations of low-paying, seasonal tourism jobs are not necessarily the fate of San Juan and Grand counties, and that their proximity to national parks might be better leveraged for economic success. Overall, average earnings per job in national park counties outpaces that of the non-park peers. In comparison, average earnings per job is low in both San Juan and Grand counties. (See Figure 10, p. 13.)

Low pay in tourism jobs appears to be a problem in both counties, where these have the lowest average earnings per job in any industry. In Grand County, the concentration of jobs in tourism pulls the average earnings for all jobs down. Compared to positions in other industries, tourism jobs tend to be part-time and seasonal, which, along with typically low hourly pay, decreases average wages per job.

### **Finding 3 — Key Points**

- Economic changes are placing a premium on community attractiveness—including natural beauty, high-quality public lands, outdoor recreation and small, friendly communities. These changes are expected to continue.
- Across the west, proximity to national parks is an economic benefit for small, rural, isolated counties like San Juan and Grand counties.
- Grand and San Juan counties face different economic and social challenges. Both counties have opportunities to better leverage their proximity to parks for improved economic performance.



Horseshollar Ruin, Natural Bridges National Monument (National Park Service photo)

## Figure 9 National Parks and Economic Vitality—Economic Performance Among Peers of Grand and San Juan Counties

### Categorization of Counties for Peer Analysis



Map: Patty Gude, Headwaters Economics

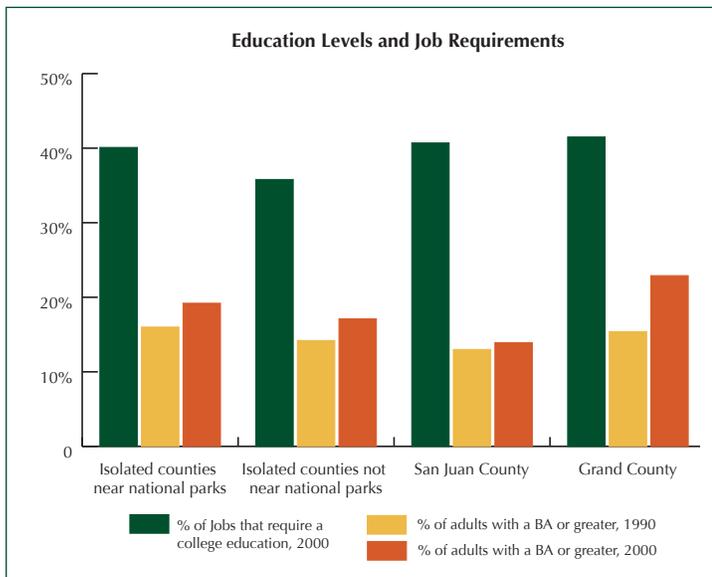
Across the western United States, 14 counties can be considered peers of Grand and San Juan counties. These counties are adjacent to national parks, but rural and isolated—more than an hour’s drive from a metropolitan area and without significant air service.

On a variety of measures of economic success, these “park peer” counties outpace the 191 counties in the west that are similarly rural and isolated but do not enjoy proximity to national parks.

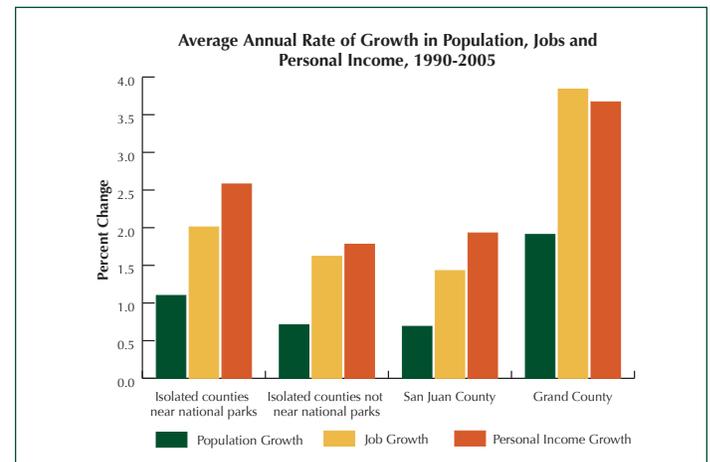
Grand County outperforms its park peer counties on many of these measures. San Juan County’s performance lags behind in many categories, with some notable exceptions. The diversity of its economy significantly surpasses that of Grand County and their “non-park peers,” and is on par with economic diversity among the group of 14 park peers. (See Figure 6, p. 9.) Both counties may have opportunities to better leverage their proximity to national parks for improved economic performance.

#### Legend

- Grand and San Juan counties and similar isolated, rural counties
- Peer counties that are not adjacent to national parks
- All other counties
- National Park System sites



Grand County outstrips its park peer counties on two measures of economic success—number of jobs that require a college degree and residents with at least a bachelor’s degree. San Juan County lags behind in residents with a college degree, but has a strong proportion of high-quality jobs requiring college education.



Grand County’s economy is booming, with accelerated growth in population, jobs, and personal income. San Juan County lags behind its neighbor to the north, and also behind the park peer counties.

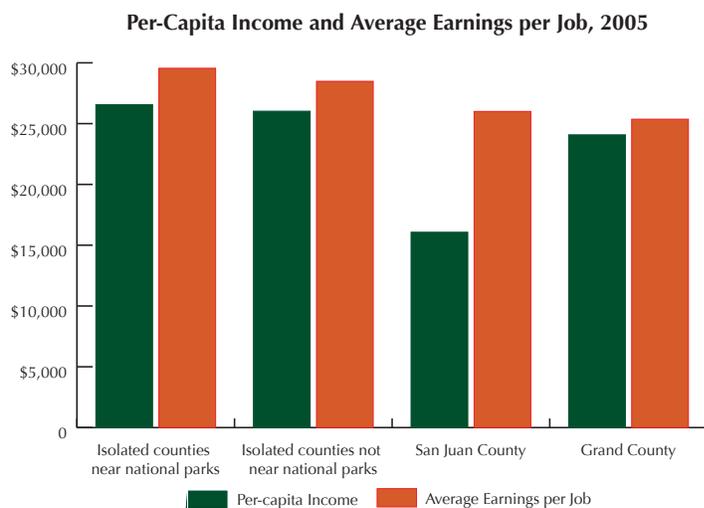
Source for both charts: Headwaters Economics analysis based on U.S. Census data

In San Juan County, wages are depressed across a range of service jobs, including those in trade, transportation and utilities, as well as tourism. In both counties, a concentration of higher-paying federal and state government positions and employment in manufacturing and mining help counteract lower-paying jobs.

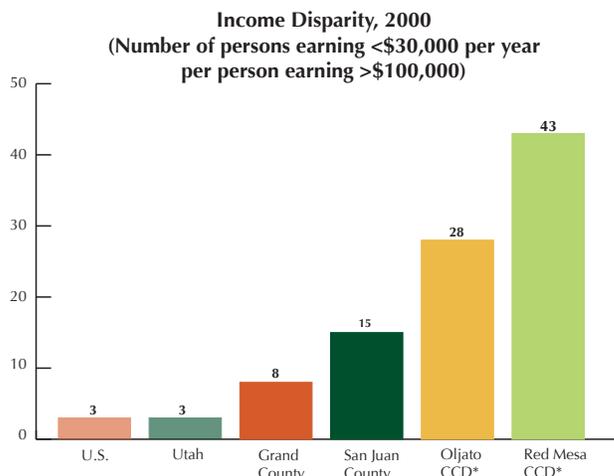
Another challenge in San Juan County is income distribution. Just over half of the county's population are members of the Navajo Nation. Income disparity is significantly greater where the Navajo population is concentrated. (See Figure 10.) This pattern reflects a variety of challenges with high unemployment and under-employment, low wages, and disproportionately high rates of poverty and reliance on welfare and other government transfer payments.

### Figure 10 Challenges to Address

Grand and San Juan counties lag behind both park and non-park peers in per-capita income and average earnings per job. Per-capita income is particularly low in San Juan County.



The gap between rich and poor is especially pronounced in predominantly Navajo areas of San Juan County such as the two Census County Divisions (CCDs) noted in the chart below.



Source for both charts: Headwaters Economics analysis based on U.S. Census data

*“The economy of the West has been evolving. Typically, counties in the West started out dependent on public lands for timber, minerals or farming. Eventually tourists discovered the area. The tourism industry...lobbied for federal and state expenditures to expand the roads and airports so more tourists could visit. That led the economy to grow beyond a dependence on resource industries and tourism. It attracted footloose entrepreneurs, including those in the [relatively high-wage] producer services, retirees, investment income and real estate development. Resource extraction has not disappeared, but it is now just one of many different sectors in a diverse economy.*”

*“Meanwhile, the role of public lands has shifted... to providing resources and opportunities for recreation. Most recently, public lands have provided a setting for gateway communities to bill themselves as attractive places to live and do business. The key element in this progression is increased access via roads and airports.... [T]he same amenities that attract tourists [may also] attract businesses to relocate.”*

— Prosperity in the 21st Century West: The Role of Protected Public Lands, Sonoran Institute



**Kate Cannon**  
Moab

Superintendent, National Park Service Southeast Utah Group

“I have a print on my office wall that is entitled, ‘Arches National Park.’ In the foreground are some of the park’s rock formations, with a beautiful backdrop of BLM lands and the La Sal Mountains. What visitors enjoy here is the same thing that everyone who lives here loves—the whole landscape. The more we can think in terms of the whole landscape, and manage it that way, the better we’ll do.”



Bicyclists enjoy spectacular scenery. White Rim road, Canyonlands National Park (National Park Service photo)

Grand and San Juan counties are two different worlds in their relationships with the region’s national parks. Moab has embraced its role as gateway to Arches and Canyonlands and has developed what Mayor Dave Sakrison terms, “a symbiotic relationship.” By contrast, the communities of San Juan County tend to have a less-enthusiastic and less-direct relationship with the parks. A more diverse economy means San Juan County is not as reliant on tourism. Still, taking better advantage of the county’s visitor attractions, including Canyonlands, Hovenweep, and Natural Bridges, is near the top of every list of economic development prospects.

Interviews with community leaders suggest several opportunities for leveraging the national parks to create more economic success for area residents while maintaining the landscape that makes this region so attractive.

### ■ Build on existing relationships between the parks and local communities

Take advantage of ways to cooperate to boost local employment, community programming and education, and other initiatives that will benefit parks and communities. Examples include:

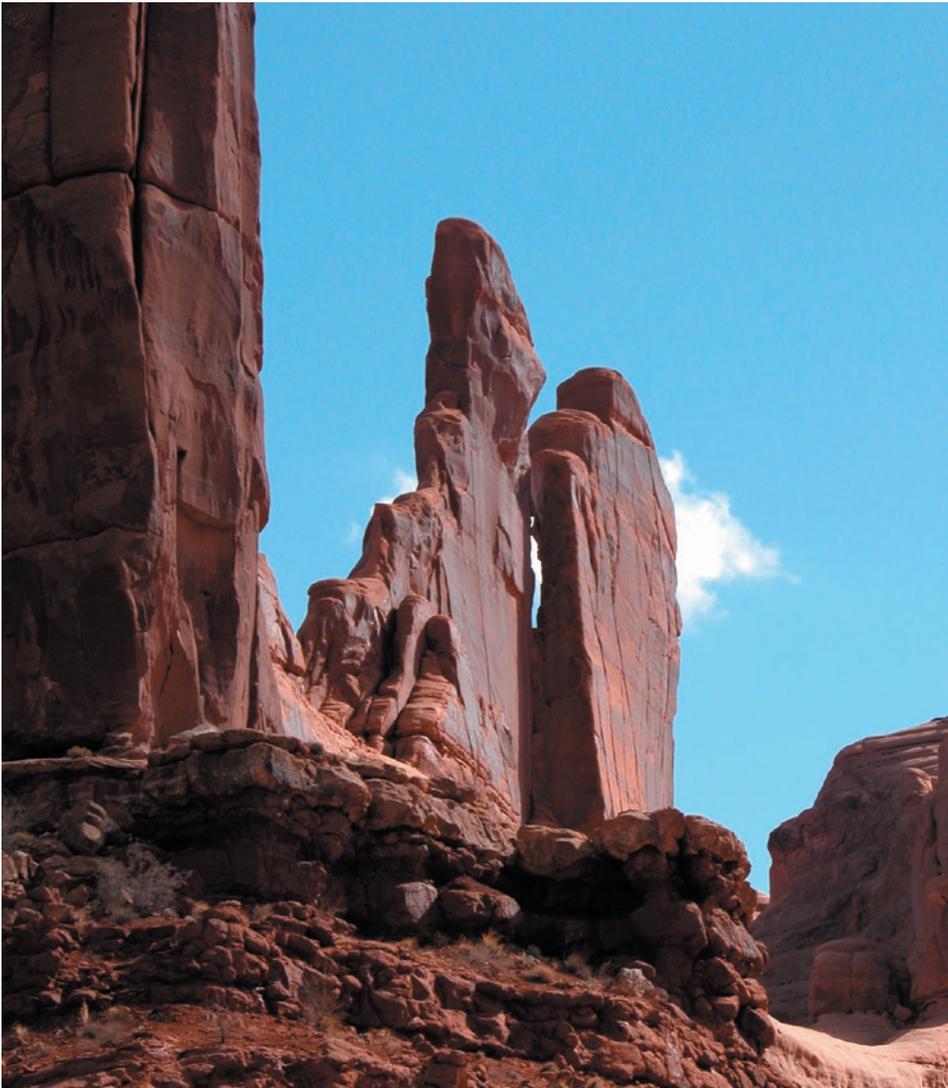
- Ensure that local businesses have the information and preparation required to bid on contracts for work in the parks. Highlight local businesses that are authorized to provide services in the parks in information that visitors use to plan their trips.
- Develop programs to attract visitors and keep them longer. Many visitors at night programs at Island in the Sky in Canyonlands report staying an extra night in the area to attend. Natural Bridges is considering building a small observatory to make the park a destination for astronomy buffs and provide resources for local communities and schools. Expanded trail systems and campground improvements at Natural Bridges and Hovenweep could encourage visitors to stay longer. Cooperative programming between parks and communities could strengthen connections and provide added visitor attractions.
- Protect and enhance the quality of night sky viewing. Southeastern Utah’s night skies are among the darkest in the country, and nighttime educational programming at Canyonlands and Natural Bridges has become popular among visitors. Adjustments are underway in the parks to make lighting less obtrusive, and communities could follow suit to make the whole area more night-sky friendly.
- Attract research projects to the parks and surrounding lands. Researchers spend money in local communities, hire seasonal help, and provide material for interpretive programs.
- Build on existing efforts such as Canyon Country Outdoor Education and Canyon Country Conservation Corps to provide education and employment for area youth.
- Support full federal funding and staffing for the parks. In Natural Bridges alone, this would add five local jobs. It would also improve park maintenance and visitor services, which are now provided mostly by volunteers and interns.

## ■ Focus on the whole landscape

Common goods such as clean air and water, solitude, quiet, wildlife, views, and recreation opportunities transcend land ownership and management divisions. These values are fundamental to the appeal of this region for both residents and visitors. A big-picture, cooperative approach to development, use, and recreation decisions can help sort out which uses are compatible with each other and with different parts of the landscape—and perhaps increase the likelihood that area residents enjoy the outcomes of these decisions long into the future.

## ■ Develop and promote a regional brand identity

Each spring, there is an exodus from northern university towns south to the desert. In search of relaxation and recreation in relative warmth, students and former students seek out the red rocks, rivers, and plateaus of southeastern Utah. The only problem is, no one knows what to call this country. Most people use “Moab” as shorthand for the whole area of parks, public lands, and towns from which to basecamp.



Arches National Park (Howard D Terry photo)



### **Margaret Dee** Montezuma Creek

Program Director, Navajo  
Nation Regional Business  
Development Office

“I believe people are interested in developing businesses that serve tourists, but don’t have good information about how to start and where to get capital.

“So far, most of the tourism businesses in the Navajo Nation are concentrated near Monument Valley.

“We’re participating in a series of community meetings and other outreach to help people see the opportunities for entrepreneurship and business development. We have a flow of people already coming through the area because of Monument Valley, the national parks, and other recreation areas in the region.

“We need to get the word out about all the resources available to help people develop their business ideas and take advantage of that flow of people and dollars.”



**Bill Boyle**

Monticello

Publisher, *San Juan County Record*

“Working together is the key. Everyone loses unless the federal agencies and local communities can establish trust and find solutions.”



Great Gallery,  
Canyonlands National  
Park (National Park  
Service photo)

Grand and San Juan counties may be well served to work together to develop a regional identity. That brand would provide a unified public face for a region that outsiders think of as one place—but that tends to think of itself as separate communities.

**■ Maintain the character of parks and surrounding communities**

Currently, there seems to be a good alignment between the character of each park and that of the nearby communities. Arches and the Canyonlands Island in the Sky district emphasize drive-through tourism, and Moab’s hotels, restaurants and tour guides serve the seasonal rush of visitors with open arms.

By contrast, Monticello and Blanding are lower-key gateways to parks and districts that draw fewer visitors. “Blanding is a pass-through, not a destination,” Blanding Visitor Center director, Harold Lyman, noted. “I used to resent it, but I don’t anymore. The community feels strongly that we don’t want to adopt a complete tourism mentality.” Still, Blanding’s slogan, “Basecamp to Adventure,” signals interest in a greater share of the burgeoning adventure travel market, and the Canyonlands Needles district is a fitting setting.

Maintaining the qualities that are so attractive about this region while providing for economic growth should be a priority for communities and parks alike. For example:

- Be smart about growth and development on private land. State projections forecast slow, steady population growth for both counties through 2020. From 8,500 people in 2003, Grand County is projected to grow to over 10,000 by 2020, not including seasonal residents. San Juan County is expected to grow from 14,000 to 18,000 residents in the same time. In both counties, population growth is expected to plateau during the 2020s. (Utah Governor’s Office of Planning and Budget, 2003)

In counties with such limited private lands, thoughtful direction of growth and development is key to maintaining community character and quality of life. Housing affordability can become an issue, as it has in Moab.

- Focus on community and economic development that enhances residents’ quality of life. Support entrepreneurship and small business, and enhance communication infrastructure and air travel. Make basic services such as education and health care a priority.
- Align park management and planning and community development directions. Focus both on long-term goals such as long-range management and visitor services plans, and on more immediate situations that arise.

National parks, and other big draws such as Monument Valley and Glen Canyon National Recreation Area, help energize San Juan and Grand counties with visitors, employment, recreation opportunities, and a uniquely attractive setting. Yet, economic performance lags behind peer counties, indicating the potential to better leverage these assets to create greater economic success for the long term.

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*Much of the economic analysis that grounds this report was conducted by Ray Rasker and others at Headwaters Economics, and not published for public release. You may download detailed economic profiles of San Juan and Grand counties from the Headwaters Economics website at <http://www.headwaterseconomics.org/eps/>. These profiles contain a significant share of the information used in the Headwaters Economics analysis.*

In 2006, the National Parks Conservation Association (NPCA) commissioned a survey of the U.S. national park system and its contributions to the American economy. The findings were striking: Every tax dollar spent on America's national parks generates at least four dollars in quantifiable value to the public. Plus, America's national parks support some \$13.3 billion in local economic activity and more than 250,000 private-sector jobs, fueling economic growth in nearby communities. In 2008, taking its cue from this larger analysis, NPCA commissioned an examination of the economic influence of national parks in Utah's Grand and San Juan counties.

This report draws on data compiled by state and federal agencies, interviews with local residents and leaders, and an analysis of economic performance among similar counties in the west. It outlines three findings:

- Parks attract people and activity;
- Parks lend economic diversity and stability; and
- Parks provide an advantage in an increasingly footloose economy.

*Landscapes of Opportunity* concludes that local communities benefit significantly from proximity to Arches and Canyonlands national parks and Natural Bridges and Hovenweep national monuments. It identifies opportunities for leveraging the national parks to create more economic success while maintaining the grand landscape that makes this region so attractive.



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