Regular Meeting
Economic Opportunity Advisory Board

Held at the Grand County Commission Chambers
125 E Center Street
Moab, Utah 84532

AGENDA
October 30, 2024

Zoom And Youtube Meeting Information

Join Zoom Meeting
Https://Us02web.Zoom.Us/J/85443667970?Pwd=Anb3v2xocde2uzf2k0hlmdnxk1fkdz09

Meeting ID: 854 4366 7970
Passcode: 2024

Call To Order

Opening Items

- **Welcome**
- **Introductions**
  - **New Staff Member Ali Harford, Assistant Marketing Director**
- **Conflicts Of Interest, Disclosures, Ex-Parte Communication**
- **Citizens To Be Heard**
- **Presentations, If Any**

Discussion And Action Items

I. Approval Of Meeting Minutes From July 31, 2024, August 13, 2024, And September 25, 2024

II. Recap Of Rural County Grant Discussion With The Governor's Office Of Economic Opportunity

III. Review Of Trail To Tomorrow Strategic Plan

- **Ben Alter To Review Notes From Meeting With Prospective Community Partners Beacon Afterschool And Grand Area Mentoring**
- **Discussion Of Action Plan**

- **Possible Creation Of Working Groups To Address Plan's Three "Pathways"**

IV. Consideration Of Future Agenda Items

- **November And December 2024 Meeting Dates**
- **Board Meeting Schedule For 2025**
- **Current Board Member Terms And Vacancies In 2025**

Adjourn

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At the Grand County Commission meetings/hearings and other Grand County Boards, Commissions, or Committees any citizen, property owner, or public official may be heard on any agenda subject. The number of persons heard and the time allowed for each individual maybe limited at the sole discretion of the Chair. On matters set for public hearings there is a three-minute time limit per person to allow maximum public participation. Upon being recognized by the Chair, please advance to the microphone, state your full name and address, whom you represent, and the subject matter. No person shall interrupt legislative proceedings.

Requests for inclusion on an agenda and supporting documentation must be received by 5:00 PM on the Wednesday prior to a regular Commission Meeting and forty-eight (48) hours prior to any Special Commission Meeting. **Information relative to these meetings/hearings may be obtained at the GrandCounty Commission's Office,125 East Center Street, Moab, Utah; (435)259-1346.**

REGULAR MEETING
ECONOMIC DEVELOPMENT ADVISORY BOARD (EDAB)

Held at Grand County, Utah Chambers
217 E Center Street
Moab, Utah 84532
Economic Opportunity Advisory Board - Regular Meeting

MINUTES

July 31, 2024 | 3:00pm

****Time stamps correspond to the video****

Members in Attendance: Forrest Rodgers, Chris Wilson, Dave Sakrison, Mary McGann, Jazmine Duncan (City of Castle Valley), Ben Fredregill (Grand County Economic Development Department)
Members in Attendance Remotely: Shalee Bryant, Bega Metzner, Melisa Jeffers, Cassie Oliver (Moab Chamber)
Not in Attendance: Ashley Kornblat
Also Present: Kaitlin Meyers (MACLT), Rob Walker (MCC) and Nicky Wilson (MCC).

Welcome: 00:06:03

Introductions: 00:06:04

Conflicts of interest, disclosures, ex-parte communication: None at this time

Citizens to -be- heard: None at this time

Presentations, if any: None at this time

Discussion and Action Items:

A. Kaitlyn Myers Report Interim Report 009:52

a. Presented as it is due in September.
b. Forrest Rodgers stated that corrections will be made to packet errors.
c. K.M. presented a report and status of expenses and timelines.
d. Motion MACLT to adopt correspondence for submission.
e. Shaylee B makes motion, Chris seconds. Motion Passed unanimously

B. Moab Community Childcare 20:16

a. Rob Walker and Nicky Wilson presented MCC 2025 RCG project.
b. Rob discussed operation and made himself available for questions.
c. Discussion for next steps as follow up to April presentation.
d. Discussion of what could be done with similar grant going forward.
e. Would like to submit grant request for 2025.
f. Discussion to hold on request until further discussion with attendees from Chamber and other options

C. Moab Area Chamber of Commerce 45:44

a. Shaylee Bryant (Board President) and Cassie Oliver (Director) discussed plan going forward for Business Summit under Chamber authority and goal to make a better event. This year's summit will be a benchmark.
b. Discussion of grant for next year and what to ask for.
c. Discussion regarding business trainings provided with grant award in this past year.
d. Further discussion on Chamber scope of grant request and application and possible incubator via **test kitchen**.
    i. Fredregill added that there may be alignment with the Trail to Tomorrow Plan that will be presented to the Commission in two weeks.
    ii. Possible issues and timing regarding being too soon for RCG Grant.
    iii. Fredregill, Jeffers and Wilson volunteered as resources for starting the initiative. Also discussed possible EDD organization changes that bring impact analysis into model.
    iv. Grant request discussion suspended for further discussion at future meeting after details have been investigated, with suggested increase in requests MCC and MACofC

D. USU SBDC role discussion 1:45

a. Discussion around concerns of USU SBDC Candidate and need to increase salary and decrease hours per week.
b. EOAB Discussion went from amending USU contract to possible clawback.
c. EOAB realizes it needs to make this a Commisson issue and handled at that level via Commission and County Attorney.
d. EOAB will rethink its relationship with SBDC and focus on local options to resolve gaps.
e. **Colette Cox joined late** in the meeting and gave caution to supplementing programs that should not need supplementation, noting that the SBDC program is under legislative review.

E. EOAB decided to hold a special meeting to finish business.

Meeting was adjourned (02:00:16)

SPECIAL MEETING
ECONOMIC OPPORTUNITY ADVISORY BOARD (EOAB)

Held at Grand County, Utah Chambers
217 E Center Street
Moab, Utah 84532
Economic Opportunity Advisory Board - Special Meeting

MINUTES

August 13, 2024 | 9:00am

****Time stamps correspond to the video****

Members in Attendance: Forrest Rodgers, Chris Wilson, Shalee Bryant, , Cassie Oliver (Moab Chamber)

Members in Attendance Remotely: Cassie Oliver, Melisa Jeffers, Dave Sakrison, Jazmine Duncan, Ashley Korenblat

Also Present: Ben Fredregill (Grand County Economic Development), Rob Walker, Debra McKee (GOEO) and Colette Cox (GOEO)

Welcome: 00:01:20

Introductions: 01:46

Conflicts of interest, disclosures, ex-parte communication

Ashley Kornblatt (Recuse from voting), Shalee Bryant (Recuse from voting) due to roles with Chamber. Wilson, Jeffers and Fredregill noted that they had proofread and gave suggestions to Moab Chamber materials. Non-voting member. Assistants only with thinking through projects.

Citizens to-be-heard: None at this time

Presentations, if any: None at this time

Discussion and Action Items:

- **A. Forrest Rodgers recapped a previous meeting and discussion that warranted a special meeting.**
  - **a. Deferred Moab Community Childcare report and application until this meeting.**
  - **b. Started Discussion with Moab Area Chamber regarding RCG grant application.**
- **B. Moab Area Chamber of Commerce Overview Discussion 10:14**
  - **a. Fill gap left by vacancy at SBDC**
  - **b. Opportunities to help with that. Ie. business functions……**
  - **c. Discussion by board regarding opportunities and fund amount**
  - **d. Funding for a website.**
  - **e. Feedback from Colette was to not repeat other efforts. Bandaid strategy vs. long term effort. Suggested business hub that collected data while serving the community.**

C. Colette Cox and Debra McKee joined at 19:50.
   a. Colette gave feedback on both proposals.
   b. Renewable grant with a little more flexibility.
   c. Match RCG to community needs.

D. Moab Childcare Overview Discussion 24:11 (Dollar amount and Rationale)

   a. Discussion averted to Colette Cox advice with her limited time to attend.
   b. Rob discussed a total ask for a new classroom and programs. 160K
   c. Colette advised responsibility and needs of the community and providing entity.
   d. Chamber ask is constrained by lack of physical space to build out programs. SBDC gaps are being reviewed as they are not fulfilling roles in multiple rural communities. CC advised to invest more into the Childcare program than Chamber at this time.
   e. CC believes this a good year to support Child Care as it is in a good launching position.
   f. Board Discussion regarding opportunities.

E. Moab Childcare Overview reinstated 45:50
   a. Review of discussion.
   b. Opportunities to continue programs and expand services and infrastructure (i.e., Online presence), Associates Degree program.
   c. Build out a workforce which is currently 17 people.

F. Board then discusses balancing ask between the two opportunities.
   a. $136,500 Moab Childcare
   b. $63,500 Moab Area Chamber

G. Motions requested before Dave Sakrison leaves deleting Quorum 1:31
   a. Fund Moab Child Care 136,500
   b. Fund Chamber 63,500
   c. Chris W. made a motion. Melissa J. Seconds motion
      i. Motion Passed (Motion Passed)
      ii. Jazmine wanted to make sure that Chamber does not duplicate Trail to Tomorrow efforts.

H. Motion to approve Moab Child Care final report 1:37
   a. Motion made by Chris Wilson to approve
   b. Melissa Jeffers Seconds
   c. Motion Passed.

At 10:38, Forrest adjourned the meeting.

REGULAR MEETING
ECONOMIC OPPORTUNITY ADVISORY BOARD (EOAB)

Held at Grand County, Utah Chambers
217 E Center Street
Moab, Utah 84532
EOAB 9/25/24

MINUTES

September 25, 2024 | 3:00pm
****Time stamps (HH:MM:SS) correspond to the video****

Members in Attendance: Forrest Rodgers, Chris Wilson, Cassie Oliver, Amy Weiser, Bega Metzner

Members in Attendance Remotely: Jazmine Duncan, Michael Black, Colette Cox, Debra McKee, Melisa Jeffers, Mary McGann

Welcome
00:09:25
Introductions
00:11:00
Conflicts of interest, disclosures, ex-parte communication
None at this time
Citizens to -be- heard
None at this time
Presentations, if any
None at this time

Discussion and Action Items:

Approval of minutes for July 31, 2024, and August 13, 2024

a. Deferred to future meeting due to lack of voting members

Articulate individual responses to the Trail to Tomorrow (TTT) recommendations and perspectives (00:14:00)

a. Forrest invited feedback from members on the TTT plan
b. Amy Weiser questioned how aligned the plan was with other plans generated in the county's Planning & Zoning Department and expressed general unfamiliarity with the plan and its process.
c. Chris asked if the Grand County Commission formally approved the TTT plan. Forrest clarified that the commission had not formally adopted the plan but only "accepted" it.
d. Chris and Forrest discussed the need for the commission input on the plan, noting the plan's repeated calls for collaboration and direction.

e. Michael noted that he and the Moab City Mayor were not deeply involved in the creation of the TTT plan.
f. Jazmine also concluded that the plan called for few “specific actions,” adding that much of the recommendations did not seem new, such as the need for increased affordable housing and locals’ sentiments towards tourism. She noted that the TTT plan suggests focusing on the “quality” of visitation to Moab as a priority.
g. Forrest agreed that the plan is “soft on specifics,” adding that this is “okay” for a strategic plan’s strategy section. He added that the plan contains a sizable number of goals and that the board would need to determine which of the plan’s three pathways should be prioritized. He added that TTT plan language like “encourage” and “support” reflected that Grand County is still building an ecosystem for business, nonprofit, and governmental capacity.
h. Chris suggested the board view this plan as an opportunity in line with the board’s bylaws changes which focus on advising the commission on policy decisions. He advocated the board put together working groups to focus on the plan’s recommendations and suggested that, should the county commission not adopt the TTT plan as a whole, the board work to put forward related policy recommendations on prioritized items within the plan.
i. Amy agreed with Chris, suggesting the board and related groups work to identify what action items should be accomplished based on the plan. Cassie agreed, describing what she believed the intention of the planning process was.
j. Jazmine asked how the plan aligned with the county’s adopted General Plan and advocated that action items derived from the TTT plan also align with the General Plan’s related economic development sections.

At 00:35:25, Melisa Jeffers and Mary McGann joined the meeting. Debra McKee, Amy Weiser, and Ben Alter were briefly reintroduced.

k. Amy discussed the current revisions occurring in the county’s General Plan. She noted that Section 11, “Healthy Economies,” is where the TTT plan should be considered for incorporation.
l. Chris suggested that transient room tax (TRT) may be able to fund some of the action items that are called for in the TTT plan and that the board should lead that discussion with the county commission, especially should items align with the TRT’s “establish and promote tourism” stipulation.
m. Forrest and Chris discussed creating working groups around the TTT plan’s three pathways and what their directives might be.
n. Colette offered to assist the board with connecting to regional and state resources in pursuit of the plan’s pathways. She also suggested that the board work with the governor’s Unified Economic Council to recognize “points of alignment” with its own plan, noting that initiatives in support of “targeted industries” often are backed with funding.

Consideration of future agenda items

a. Ben Alter provided an update on the county's decision to not request that Utah State University (USU) return funds previously allocated for staffing a Small Business Development Center (SBDC) role, noting that USU intends to advertise the job posting.

At 00:57:00, Forrest adjourned the meeting.

TRAIL TO TOMORROW

A 5-year strategic plan for Sustainable Tourism, Economic Diversification, and Asset-Based Community Economic Development in Grand County, Utah

TRAIL TO TOMORROW
Preserve • Promote • Prosper

GRAND COUNTY
Economic Development
Tourism • Business • Film

Better Destinations LLC

NICHOLS TOURISM GROUP
Advisory services for an evolving tourism industry

RRC ASSOCIATES

CONTENTS

NOTE: The TRAIL TO TOMORROW SITUATION ANALYSIS, provided as a companion document, provides in-depth reporting of findings shared in the TRAIL TO TOMORROW PLAN.

TOWARD 2029

THE PURPOSE OF THE PLAN

Grand County, Utah, is a place of otherworldly beauty that draws people from across the globe to play in its stunning parks, high desert, canyons, legendary rivers, and mountains. It's also a place that has an uneasy relationship with its biggest economic driver.

With 3 million visitors a year vastly outnumbering the locals, tourism often is seen as a disruptor to local quality of life rather than as the county's most powerful economic resource. As in many other rural places renowned for outdoor recreation, Grand County's people and businesses struggle with impacts of visitation, a seasonal economy, and most of all a housing shortage that is a major cause of its workforce shortage. For so many reasons, Grand County is not an easy place for working people to make a life. Tourism has become a flash point for local frictions.

In spring of 2023, the Grand County Commission authorized this five-year strategic plan for the county's Economic Development Department (EDD) from lodging tax revenue temporarily diverted from tourism promotion to explore ways of diversifying the economy. When state legislators cut the county's experiment with economic diversification from five years to two, this plan was among the last initiatives to be funded in June 2023.

This extensively researched strategic plan — now known as the Trail to Tomorrow plan — embraces an innovative challenge. While such plans often focus on improving either tourism or economic development, Grand County chose to explore both opportunities at once. As a result, this plan was designed to equip the EDD with new ways to manage the county's tourism economy for success while helping to shape new economic opportunities. Ultimately, the goal is to improve local quality of life.

To create a shared understanding of this unique proposition, the planning process kicked off in October 2023 by identifying a purpose statement and principles to guide and communicate the intentions of this project. From the start, a primary purpose was to encourage all to absorb new findings and listen to other perspectives to resolve conflicts and arrive at a shared vision for the county's future.

THE PURPOSE STATEMENT

To achieve greater harmony between local economic realities and what residents prioritize, Grand County is creating the Trail to Tomorrow Strategic Plan to manage tourism more sustainably while continuing to develop a diverse economy over the next five years.

With a commitment to hearing all voices, this planning process is intended to enhance local quality of life as well as the experience of those who visit or do business here, while safeguarding the special nature and culture of Grand County.

GUIDING PRINCIPLES

TRANSPARENCY:
Building trust through openness.

LISTENING:
Being open to other points of view.

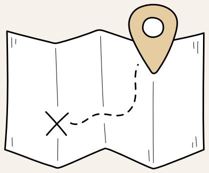
LEARNING:
Leaning on research and best practices rather than opinion.

STEWARDSHIP:
Showing care for communities and places.

ALIGNMENT:
Identifying shared goals for Grand County's economic vitality.

FINDING THE BEARINGS

MAPPING THE TRAIL

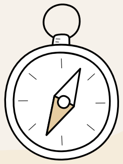


DESKTOP RESEARCH
The project kicked off in October 2023 with review of existing plans and extensive research using public and proprietary databases.

IN-DEPTH INTERVIEWS
About 15 hour-long interviews, including eight requested by the EDD, were conducted to gain deeper perspectives into key topics.

BUSINESS SENTIMENT STUDY
A survey fielded in early 2024 sought the views of local businesses and workers, securing 202 responses.

VISITOR PERCEPTION STUDY
Drawing 1,345 random responses from the EDD's visitor database and a purchased list, this survey identified brand strengths and key visitor characteristics.

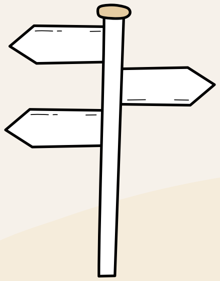


STEERING COMMITTEE MEETINGS
A 9-member steering committee met four times to provide oversight and share input.

14 TOPICAL ROUNDTABLES
About 160 business and community leaders joined in 90-minute focused discussions of topics relating to tourism and economic development.

COMMUNITY FORUMS
About 30 residents shared input at two community forums in January but, despite intensive outreach by the EDD, two forums in May drew no attendance.

IDEATION SESSION
The May steering committee meeting was dedicated to reviewing and sharing input for a proposed planning framework.



'TRAIL TO TOMORROW' PLAN
The plan was shared with the Grand County Commission on August 21, 2024.

MAPPING THE TRAIL

KEY FINDINGS

- **Services and retail are the backbone of the Grand County economy, generating 87% of taxable sales from April 2023 to March 2024.** Of that amount, 52% came from services — including lodging, restaurants, and drinking establishments — and 35% from retail trade. This is powerful evidence that Grand County's economy is tourism-based.
- **This vital economy is slowing.** While Grand County taxable sales over the past 10 years have grown 80% overall, or by 39% when adjusted for inflation, growth has slowed since the boom year of 2021. While price increases helped lift overall taxable sales, the county's two biggest sectors — lodging and restaurant/beverage establishments — saw a drop in taxable sales in both 2022 and 2023.
- **Meanwhile, both Washington and Summit counties' lodging and restaurant sectors saw continued growth in taxable sales during 2022 and 2023.**
- **Traffic volumes on U.S. 191 dropped 6.6% from 2021 to 2022 and another 2.2% from 2022 to 2023.** Declining vehicle traffic is another indicator of lower visitation.
- **While Arches' timed entry system has reduced visitation within the park, it has had little impact on overall visitation to Moab area parks.** Visitation to Arches, Canyonlands, and Dead Horse Point dropped 16% in 2023 from pandemic highs in 2021. However, combined visitation to the three parks in 2023 was down just 0.3% from 2019. The reason: While Arches visitation dropped 11% from 2019 to 2023, both Canyonlands and Dead Horse Point saw numbers climb by 9% to 10%.
- **A 4% drop in demand for Grand County hotel rooms between 2021 and 2023, coupled with a 0.5% increase in inventory, led to a 3-point drop in occupancy rates.** In 2023, the county's 63.2% average occupancy for 3,019 hotel rooms was slightly below the midpoint for its competitive set.
- **The county's inventory of 1,011 vacation rentals grew by 18% from 2021 to 2023 but the occupancy rate dipped just 6%.** This points to significant growth in demand for vacation rentals, which likely was a factor in the county's declining hotel occupancy rates.
- **Visitation to Arches and Canyonlands is almost perfectly correlated to taxable sales in Grand County.** This means that as visitation to the two parks rises or falls, taxable sales go up or down in nearly perfect proportion. From 2010-2019, the correlation rate of taxable sales to Arches and Canyonlands visitation was between .94 and .95, with 1.0 indicating a perfect positive correlation. With pandemic-influenced years of 2020-2023 included, the correlations weakened only slightly, to .87 and .93.
- **In January 2024, Canyonlands Regional Airport lost its status under the federally subsidized Essential Air Service program, which cost Moab its United Express/Skywest service to Denver.** Now CNY is using a USDOT Alternate Essential Air Service grant to fund daily Contour charter flights to Phoenix. The EDD is subsidizing two flights a week to SLC.
- **Compared with 11 other places renowned for outdoor recreation, Grand County is lightly populated and employment is highly concentrated in a single industry.** Of the county's jobs, 48.9% relate to tourism and outdoor recreation. Only Mono County CA, home to Mammoth Lakes, has a higher percentage of jobs concentrated in that sector (54.8%).
- **Of 12 comparison communities, Grand County has both the lowest median household income and the highest share of "housing cost-burdened" homeowners.** Nearly 46% of county homeowners have mortgages taking more than 30% of their incomes, an indicator of economic vulnerability.
- **More than 40% of Grand County's U.S. visitors in 2023 came from Utah (24%) and Colorado (19%).** Most of the rest came from three high-population states — Texas, California, and Florida — and the western states of Arizona, New Mexico, Nevada, Idaho and Washington. International visitors provided 8.3% of the county's 2023 visitor spending. Top markets: Canada, Germany, and France.

GRAND COUNTY TODAY

The Visitor Perception Study conducted for this plan affirms that U.S. travelers interested in outdoor recreation see the Moab area as the gold standard.

The random survey of 1,345 travelers ranked the region best in class overall against 13 competitor destinations focused on outdoor recreation. The Moab area's ranking for natural beauty and outdoor experiences was almost off the chart, and the destination won top honors for friendly people as well. Even its lowest rankings — for its arts and culture scene, dining and food, and variety of lodgings — fell into positive or highly positive ranges overall.

These are the kinds of research findings that make many locals think marketing Grand County is a waste of money or that it will attract too many visitors. But Grand County's tourism economy has been slowing over the past two years. The region's taxable sales from its lodging and restaurant sectors have fallen, even as receipts have climbed in Washington and Summit counties. Many local tourism operators and retailers cite a drop off in customers, and UDOT traffic counts bear them out. Vehicle traffic on U.S. 191 north of Moab fell 6.6% in 2022 following the boom year of 2021, which few wish to see repeated. But traffic counts dropped another 2.2% from 2022 to 2023. Meanwhile, occupancy rates for the county's 3,019 hotel rooms and 1,011 licensed vacation rentals have fallen, even when adjusted for growth in inventory.

Impacts of Arches' timed-entry system

Many have been quick to blame the Arches timed entry system. Combined visitation from Arches, Canyonlands, and Dead Horse Point State Park fell 16% between 2021 and 2023, when the reservation system was fully implemented. However, when 2023 visitation for the three parks is combined and compared with 2019 numbers, overall visitation was virtually unchanged, down by just 0.3%. Although Arches had 11% fewer visitors than in 2019, both Canyonlands and Dead Horse Point saw 9% to 10% increases in visitor numbers. Visitors came anyway, but visited alternatives to Arches. The study also showed that 93% of those who needed a reservation to see Arches had secured one.

Many with businesses that run on tourism — hotels, restaurants, drinking establishments, retail shops, and outfitters — trace the softer tourism economy to two other factors: the county's decision to swap out promotional campaigns with "Recreate Responsibly" messaging and other actions creating a perception that the county is unfriendly to visitors, especially off roaders. Competitor destinations have been quick to take advantage, touting their offerings as more visitor-friendly than Moab's.

MAPPING THE TRAIL

GRAND COUNTY TODAY (continued)

Strengths and signs of diversification

Grand County has powerful strengths to combat negative perceptions, including its standing as home to two of Utah's "Mighty Five" national parks — Arches and Canyonlands. Its 3 million visitors are a powerhouse of economic activity, with potential to finance many desirable improvements. Apart from the region's reputation as an outdoor recreation mecca, locals describe a culture of resilience and resourcefulness. Many say they moved to the region to enjoy their favorite outdoor recreation pursuits, but stayed for the strong sense of community, seen by many as a key to the local quality of life.

Though its land mass is a third larger than the entire state of Delaware, Grand County has just 9,700 residents, with 5,200 residing in Moab City. Its employment base has grown substantially in the past 10 years, with jobs covered by unemployment insurance up by 42%, far outpacing the 2% population growth. Nearly 50% of the county's jobs are related to tourism, comparable to Summit County (43.4%) and far more than Washington County (18.7%). Even so, job growth over the past 10 years has been greater in non-tourism than tourism sectors, pointing to some diversification in the county's economy. During the same period, taxable sales grew substantially across both tourism and non-tourism sectors. Meanwhile, there have been moderate shifts in the seasonality of sales, with a downtrend in July and August and a proportionate uptrend in March and September, indicating some shifts in seasonal demand.

Housing and workforce challenges

As noted by so many during this planning process, Grand County's biggest current challenge is lack of housing, Most hotel operators provide at least some employee housing. Others employ people with no home address. Fully 45% of homeowners have mortgages exceeding 30% of their income, a strong indicator for economic vulnerability. One major factor in the cost and availability of housing is the extremely limited supply of privately held land. More than 95% of Grand County is controlled by federal, state, or tribal interests, compared with 75% for Utah overall.

These concerns are echoed in a recent business needs assessment by the Moab Chamber of Commerce. The study identified three top challenges, all closely linked: a lack of housing, a lack of skilled workforce, and seasonal ebbs and flows in business. Says one local business owner, "The quality of the workforce would increase if there was some place for them to live." Says another: "We're struggling to keep people hired because of how much of a struggle it is to live here. It ruins the local feeling toward tourism because we can't keep our businesses operating at full staff." Some note the gap between the cost of housing and pay is as much an issue for executive recruitment as for service-related jobs. Talent recruitment also is impacted by the quality of the county's school system, where only 73% of students graduate from high school in four years compared with 88% statewide.

Tensions and solutions

Grand County has advanced many efforts in recent years to ease tensions over tourism by tackling one of the biggest user conflicts in Moab City limits — the roar of UTVs passing by more than 100 bedroom windows. The conflict may reach new heights as a brand-new luxury offering, the Lionsback Resort, opens at the gateway to Sand Flats Recreation Area, home to the county's most famous off-roading trail, Hell's Revenge. Along with other Utah communities, Moab has sought ways to balance the interests of UTV users with other user groups and local residents. However, Grand County's past efforts to moderate speeds, limit access, and impose noise limits on off-road vehicles all have been overturned by state officials. Many off-roading operators have voluntarily modified their rental vehicles. In the course of this process, the off-roading community expressed a willingness to find a shared approach to reducing local tensions.

Many see answers in focusing on what Moab stands for, outdoor recreation and adventure. Some add a caution to avoid sapping Moab's soul by turning it into a resort town. A risk that many see — apart from lack of housing and workforce — is that Moab is pricing out its outdoor clientele with $500-a-night room rates and high costs, even as its brand is embattled and its community amenities are strained compared with other places. These same voices believe that attracting the ideal guests — those who value the outdoors — while addressing the most pressing issues and creating more economic opportunity will make the visitor economy more palatable to more people.

MAPPING THE TRAIL

COMMUNITY ENGAGEMENT

The Trail to Tomorrow process was crafted to create multiple avenues for community-driven thinking to enrich the strategic plan. The most productive tactic by far was a series of 14 topical roundtables that engaged about 160 local leaders in 90-minute discussions of topics relating to tourism, outdoor recreation, and economic development. A nine-member steering committee of county and city officials and community leaders met four times to share thinking and oversight. Valuable perspectives also came from 15 in-depth interviews and a business sentiment survey drawing 202 responses.

Four community forums were scheduled to give residents opportunities to share direct input into the planning process. While about 30 people took part in two January sessions, there were no takers for simultaneous sessions offered in Spanish. Two community forums in May attracted no attendance, despite the EDD's vigorous outreach. A Trail to Tomorrow microsite on the county's engagement platform drew only modest interest.

County officials say residents turn out in force to share views when topics hit close to home but may be weary of planning efforts. One January forum attracting 10 attendees was up against a popular offering at a local pub, "Science Night," which drew more than 100 attendees to a lecture on snakes.

January Community Forums

Although overall attendance was relatively low, participants shared valuable perspectives that were highly consistent with other findings. Housing affordability and availability topped the list of concerns, and outdoor recreation, followed by tourism, were described as the county's most important industries. Participants described the place they live as quirky, lively, full of heart, and blessed with the most comprehensive mix of world-class outdoor experiences in the world.

They said Grand County excels in search and rescue capabilities, its range of guided experiences, outdoor youth experiences, and commitment to looking out for others. Many have high aspirations for their community. By 2029, they hope to see a revitalized, beautified downtown that maintains its historic fabric, higher test scores in local schools, more prosperity and well-being, desirable affordable housing, better walking and biking connectivity, more commercial businesses, and a happier community. All while still being a world-class destination.

There was nearly 100% support for attracting visitors who share care for natural resources. Visitors taking guided experiences also were highly valued. The lowest-ranked visitors were those interested in exploring the county's less-visited spaces. Many saw them as likely either to place a burden on search and rescue operations or to disrupt special places not equipped for visitation. Participants had mixed feelings about extreme adventurers. Many saw them as people who tended to bring their own gear and supplies, thus leaving little economic impact while taking advantage of the county's stellar offerings.

Tourism study found greatest concerns in Grand County

Rather than ask locals to respond to yet another survey about tourism, this plan draws upon the compelling findings of The Kem C. Gardner Policy Institute's 2022 statewide study into residents' attitudes toward tourism. Slated for a refresh in the near future, the study of 14 Utah regions found Grand County had the greatest concerns about tourism.

- The Moab area had the most negative scores for impacts on the natural environment, housing affordability, and locals' ability to access recreational opportunities.
- Just 22% said, "Positive effects of tourism outweigh the negative."
- Moab area residents strongly agreed (4.52/5.0) with this statement: "In our area, our way of life has changed to suit visitors."

Kem C. Gardner POLICY INSTITUTE
THE UNIVERSITY OF UTAH
DAVID ECCLES SCHOOL OF BUSINESS

MAPPING THE TRAIL

COMMUNITY ENGAGEMENT

Topical Roundtable Findings

A series of 14 topical roundtables yielded many valuable insights from about 160 local leaders who joined in 90-minute discussions convened from November 2023 to April 2024. Attendees included County Commissioners, Moab City Council members, representatives of local businesses and nonprofits, land managers, members of the local arts community, and many others. Some attended more than one roundtable. Major findings are as follows:

- The county's tourism and outdoor recreation economy has been battered by local pushback against tourism and by competitors seeking to gain advantage.
- One of the biggest challenges for all is staffing, mainly due to lack of attainable housing and seasonality of employment. Employers say high turnover makes it hard to maintain a trained staff. Employees may quit to earn $1 an hour more with another employer, or leave when the season ends. Many service workers rely on food stamps about 12 weeks of the year.
- To foster a successful outdoor economy, it's vital to provide solid, quality experiences for everyone and make sure that no user group diminishes the experience of another user group.
- Many tourism operators — whether restaurants, hotels, or outfitters — believe the county needs to do more to support its primary economy, especially by attracting visitors. Visitation is down, international travelers aren't back, and costs are way up, especially for wages.
- The off roading community, in particular, feels embattled and unappreciated for the steps many operators have taken to mitigate impacts. Many say they would be open to seeking shared solutions.
- When traffic and parking congestion keeps visitors from coming downtown, the county and Moab City aren't getting the full benefit of tourism. Safety, access, congestion, and noise are all important considerations for more holistic transportation planning.
- Many believe a bypass or other strategies to divert traffic are needed for the county "to be at its best" and address noise and safety concerns. A route identified years ago for a bypass is now built up with housing.
- Retailers call for more downtown amenities to attract shoppers, including clean restrooms that are open into the evening hours, regular trash pickup, smooth sidewalks, and more parking during busy times.
- Development of regenerative, "tourism-adjacent" industries is a way that Grand County can turn 3 million visitors into an even better asset.
- Grand County is falling behind on sharing interpretation of cultural resources ranging from sites sacred to indigenous people to old mining districts and historic towns. Unless awareness is shared, people may not realize when they are harming special places.
- The county has much potential as an arts destination, and art is a "non-contentious tourism activity." There's "a gold mine here" with an abundance of local talent and a wildly creative collection of art experiences.
- Business operators say Grand County puts itself at a disadvantage for attracting or maintaining commercial businesses by being slow to advance permitting and zoning requests. Meanwhile, other Utah jurisdictions are offering incentives and a problem-solving attitude to attract and retain business.
- Moab has not built a culture that encourages high school graduates to seek post-secondary education. Because many new graduates can secure decent-paying jobs in the community, they don't seek to further their education. "This flattens students' well-being for the rest of their lives."
- Many locals have little opportunity to experience the lifestyle that drew them to Moab and Grand County. While surrounded by natural beauty and opportunities for outdoor recreation, many are working two to three jobs to pay the bills.

14 Topical Roundtables

- Public Lands
- Off-Roading
- Restaurants
- Air Service, Transportation and Transit
- Hotels, Lodging & Vacation Rentals
- Outdoor Recreation
- Infrastructure and Ecosystems
- Economic Diversification & Entrepreneurship
- Cultural Resources & Diversity
- The Creative Economy
- Retail Sector
- Business Services
- Career & Workforce Training
- Quality of Life

BUSINESS SENTIMENT STUDY

Tapping into the business community's perceptions about the local economy was vital for the planning process. To capture a cross-section of opinion, a survey was shared widely to seek the business community's views into the health of the economy, key economic drivers, and quality of life. With 202 responses providing a range of insights, findings were aggregated to share a countywide perspective. About 71% of respondents owned or managed a business or nonprofit, 81% were full-time county residents, and 85% lived in Moab. The largest share of respondents said their businesses related either to lodging and hospitality (22%) or tourism (18%) with the remainder representing several other business categories.

- Respondents strongly agreed that visitors sustain the local economy (58%) and help support residents' quality of life (48%) but many raised concerns about the capacity of local infrastructure and services to support millions of visitors. This concern was consistent with mixed views about the value of promoting Grand County to attract travelers. While 47% said it was important to promote the county, 40% said it wasn't. This split points squarely to a rift that the EDD must navigate with future allocations of lodging taxes.
- The cost and availability of housing were identified as the county's top barriers for economic development, with 70% of respondents citing these concerns. This same concern is shared by many other outdoor-focused communities across the U.S. where housing prices have risen sharply.
- Nearly two-thirds of respondents described the county's current quality of life as good or excellent (62%), although a third believed it was declining. Nearly half (46%) said Grand County's quality of life is better than in other Utah counties but only 26% said it's better than in other outdoor recreation-focused communities in the western U.S.
- About 81% believe it's important to expand opportunities for entrepreneurs, and 79% saw value in expanding the arts and culture economy. Respondents also shared strong support for promoting off-peak season visitation and events and recruiting manufacturing. Less support was shared for attracting remote workers and peak-season tourism promotion.
- About 77% described their businesses as at least somewhat seasonal. April, May, October, and September were noted as the busiest months. January, February, and December were the slowest.

How do you feel about the following types of possible development actions that could be considered in Grand County?

Rating Category	Average	n=	1 - Strongly Oppose	2 - Somewhat Oppose	3 - Normal	4 - Somewhat Support	5 - Strongly Support
Extend support for entrepreneurial development	4.2	168	2%	2%	14%	30%	51%
Encourage development of the arts and cultural economy	4.1	169	5%	4%	12%	33%	46%
Encourage and expand the number of shoulder/off-peak season events	3.7	167	13%	11%	13%	22%	41%
Collaborate with the state and regional partners to attract manufacturing companies	3.7	168	7%	14%	17%	31%	31%
Expand tourism development and promotion in the shoulder/off-peak season	3.4	169	21%	11%	8%	20%	40%
Encourage and expand the number of outdoor recreation events	3.4	168	13%	18%	18%	18%	33%
Attract remote workers who work for businesses outside the country, but contribute to the county as primary resident	3.2	165	16%	14%	23%	24%	22%
Expand tourism development and promotion in the peak-season	3.1	169	22%	18%	18%	13%	28%

MAPPING THE TRAIL

VISITOR PERCEPTION STUDY

With destinations from Bentonville, Arkansas, to Las Vegas, Nevada, seeking to energize their economies through outdoor recreation offerings, it is essential for Grand County to understand how it ranks against the competition. To gain insight into the attitudes, experiences and values of outdoor recreation travelers, especially those who have visited Grand County, a Visitor Perception survey was fielded in spring 2024, securing 1,345 responses. Of those, 1,000 were generated from a random panel of U.S. travelers interested in outdoor activities, with the remaining 345 randomly selected from the EDD's database of people requesting trip information in recent years.

- **Before knowing the survey related to Grand County, respondents cited Utah and Moab as top destinations for mountain biking, off roading, rock climbing, white water rafting, and adventure sports in the western U.S.**

- **Outdoor recreation travelers place Moab at the top of the class.** Across both survey groups, respondents ranked Moab highest overall of 14 U.S. destinations known for outdoor recreation. Moab also topped the rankings for natural beauty, outdoor experiences, and friendly people. For both survey groups, all comparisons were against other outdoor destinations they knew of. Moab ranked lower than many other destinations for its arts scene, food culture, and variety of lodgings.

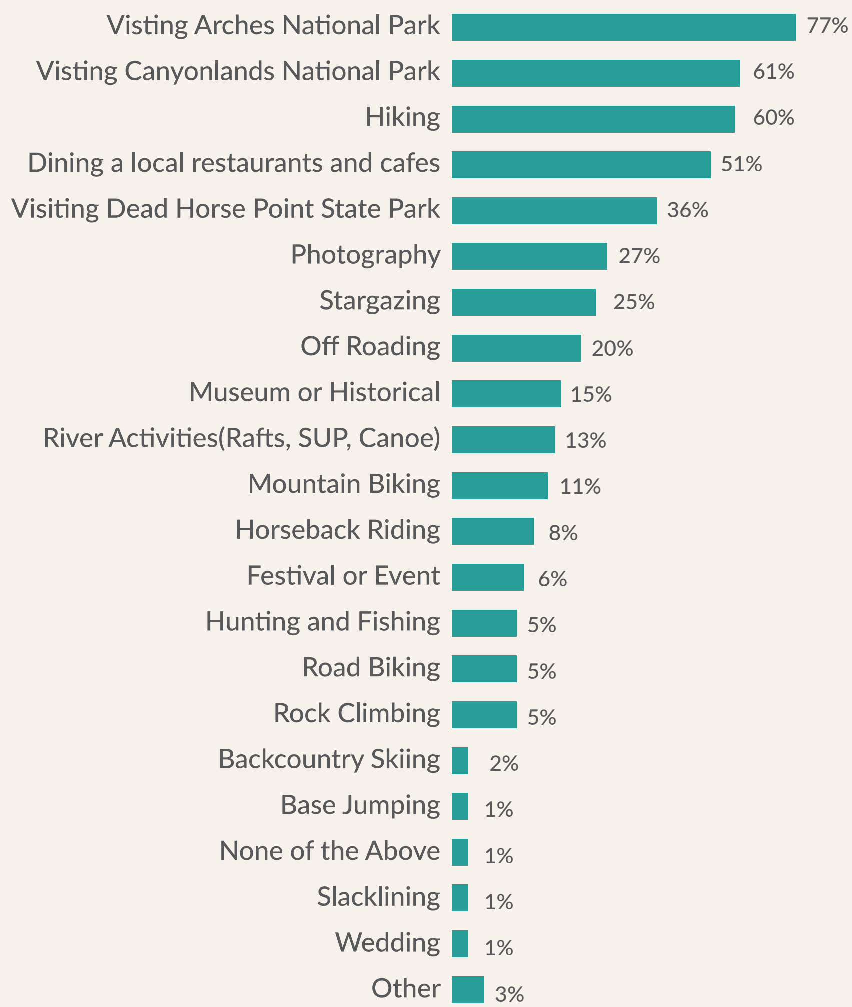
Q: When you think of the best places for [mountain biking, off-roading, rock climbing, white water rafting, and/or adventure sports] in the Western United States, which towns or places come to mind?

271 Comments | Only comments mentioned 2 or more times are shown

VISITOR PERCEPTION STUDY (continued)

- **Most of those who had been to the Moab area had visited as part of a long trip, stopping an average of 3.3 days in the Moab area during a 9.7-day trip.** Those who visited Arches National Park reported staying longer, spending an average 3.8 days of an 11.3-day trip in the Moab area. Off roaders, mountain bikers, and climbers often reported the longest local stays, typically spending about half or more of their trip in Moab.
- **Arches National Park was the single biggest draw.** More than three-quarters reported visiting Arches during their most recent visit. These respondents also reported high rates of visiting Canyonlands National Park and Dead Horse Point State Park, hiking, and dining at local restaurants. One in five Arches visitors also reported taking part in an off-roading experience.
- **Far more visitors went off roading (20%) than took part in river activities (13%), mountain biking (11%), or climbing (5%).** Visitors showed substantial interest in photography (27%) and stargazing (25%).
- **Nearly a quarter of respondents took part in a guided experience during their most recent trip to the Moab area.** More than 80% engaging in river-based activities used a guide, while nearly half of off roaders and a third of mountain bikers reported taking a guided experience.
- **While many came to see the national parks, these visitors are among the least likely to come back in the next three years.** In contrast, mountain bikers, off-roaders, and climbers are much more likely to indicate at least a 75% chance of returning within the next three years. Though currently small in number, the visitors most likely to return include wedding travelers, base jumpers, backcountry skiers, and slackliners. Wedding travelers were almost 100% likely to return.
- **Crowds and costs are a potential threat to the Moab experience.** Since their first visit to Moab, many repeat visitors have observed increased crowding and development, longer wait times at popular places like Arches National Park, and rising costs for lodging and camping.

Which of the following activities, if any, did you participate in on your most recent visit to Moab?

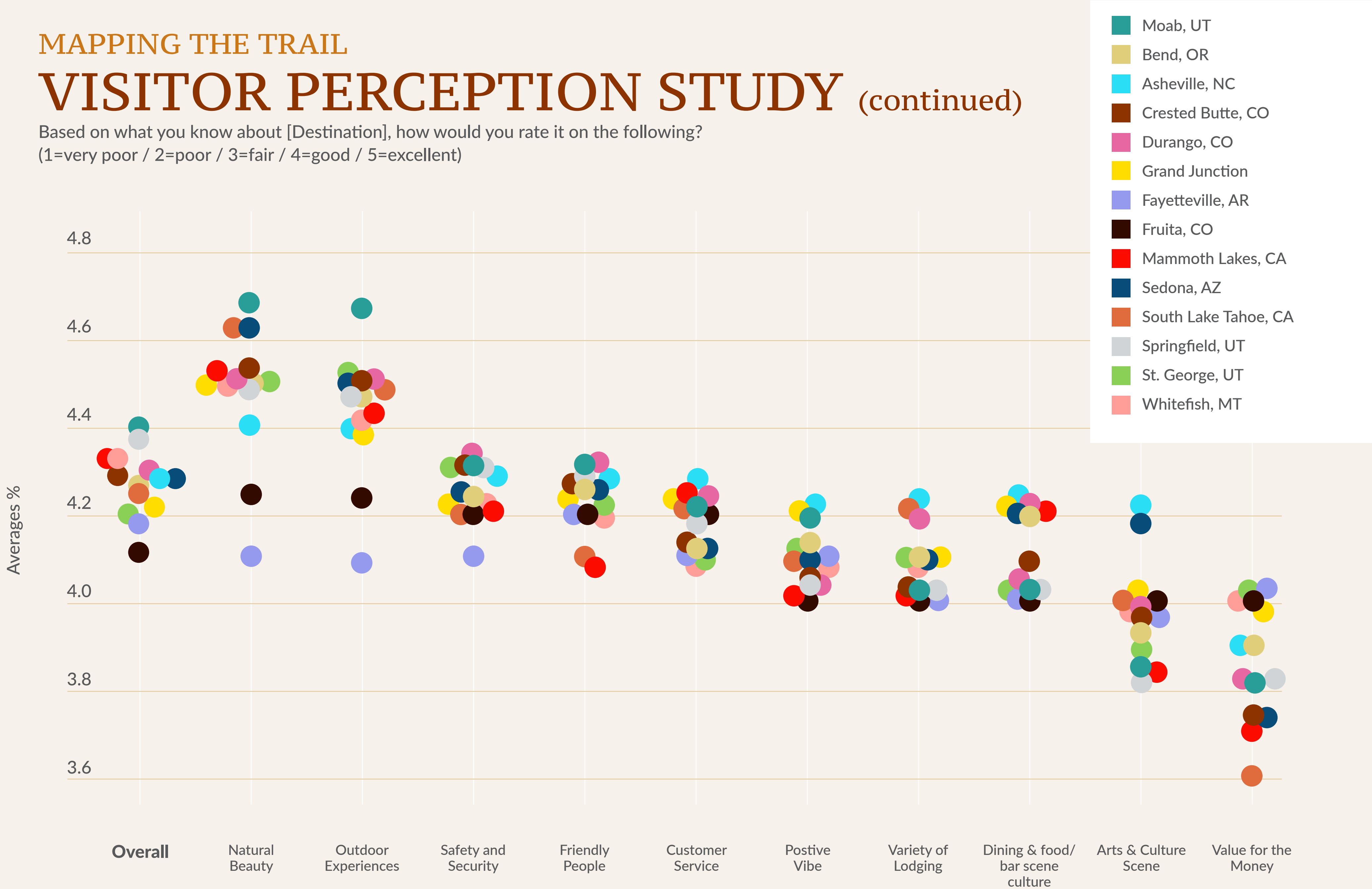


Source: Trail to Tomorrow Visitor Perception Study

MAPPING THE TRAIL

VISITOR PERCEPTION STUDY (continued)

Based on what you know about [Destination], how would you rate it on the following?
(1=very poor / 2=poor / 3=fair / 4=good / 5=excellent)



THREE TARGET TRAVEL SEGMENTS

Grand County is well-positioned to develop a sharp focus for both marketing and product development by targeting three categories of outdoor recreation travelers: Sightseers, Adventurers, and Overlappers — those who dabble in each of the first two categories.* Each segment represents a cluster of attitudes, interests, and skill levels that can be marketed efficiently. Working with land managers, Grand County can enhance, create, and promote outdoor experiences meeting each segment's expectations while sharing practices for recreating responsibly. This will satisfy strong community interest in attracting authentic outdoor travelers and create successful strategies to reduce visitor impacts. By creating a clear definition of who Grand County seeks to attract and matching visitors' skills and expectations to available experiences, the EDD can meet economic goals as well as goals for resource protection.

Further research is required to shed light on the value, size, preferences, habits, and Moab brand awareness for each of these three outdoor recreation segments. However, it is likely that Sightseers and Overlappers will contribute a somewhat higher economic impact. Both categories are somewhat more likely to pay for guided experiences and stay in hotels and other constructed lodgings. Overlappers may be more likely to buy gear at local shops, stay longer, and come back. Sightseers may be more likely to enjoy arts and culture offerings, shop, and explore the local dining scene. Adventurers bringing their own gear and supplies may be light on economic impact but the tales and photos of their exploits will help build and maintain the Moab brand in ways that will better attract Sightseers and Overlappers.

Regardless, this direction represents a smart way for Moab to derive the most value from its reputation as the top outdoor recreation destination in the U.S. Rather than market outdoor recreationists as a monolith, as many destinations do, this approach is geared to deliver the right messages and products to the right travelers for Grand County in ways that will resonate well locally.

*** PLEASE NOTE: The three target travel segments cited on this page and much of the related content were developed by Public Lands Solutions, a recreation economy consulting firm based in Moab UT.**

SIGHTSEERS	OVERLAPPERS	ADVENTURERS
CHARACTERISTICS Last Trip might have been to Paris. Generally, don't have specific equipment with them. May not even have hiking shoes. Moab is part of their travel plan. May participate in soft adventure or soft guided experiences. Generally spend on lodging and food. Generally a shorter stay.	**CHARACTERISTICS** Last Trip might have been to Glacier. Moab makes up a larger part of their travel plan. Seeking experiences not just views. Definitely use soft guided adventures. Open to trying new expereinces. Generally don't have specific equipment with them. Generally spend on lodging and food.	**CHARACTERISTICS** Last Trip might have been to Bentonville, AR. Bring equipment and actively seek ways to test their skills on renowned experiences. Often camp or Airbnb. Moab is their primary destination or a major part of their travel plan. Tent to stay longer, likely to return.
OPPORTUNITIES Lengthen stay by seeing all the parks. Take more guided experiences. Buy outdoor clothing or gear as cool souveniers.	**OPPORTUNITIES** Lengthen stay by bundling lodging and day tours. Take more guided experiences. Buy gear to enjoy future adventures. Come back to do more.	**OPPORTUNITIES** Inspire more spending. Guide them to local outdoor-focused hotels and restaurants to mix with other members of the outdoor community. Entice them to outdoor-focused events, offerings and retail.
PRODUCT DEVELOPMENT POSSIBILITIES Create more must-see, low impact front country sights that merit a longer stay. Create more "soft" expereinces, such as guided hikes or "flip-flop hikes. Create more "sights," such as cultural trails or arts and culture offerings.	**PRODUCT DEVELOPMENT POSSIBILITIES** Build a progression: Hike this trail today and come back tomorrow to hike a different section. Clearly identify a diversity of trails and experiences with associated amenities and cleat expectations for difficulty and terrain.	**PRODUCT DEVELOPMENT POSSIBILITIES** Improve trail and camping amenities. Better wayfinding & interpretation. Cross-sell and create additional experiences that match the renown. Add campground features, including WiFi, hot showers, etc., to justify higher rates.

THE WAY AHEAD

VISION AND MISSION

From the start, the Trail to Tomorrow planning process has centered on how the local economy can be shaped — whether through improved tourism or more economic diversification — to enhance the quality of life and place in Grand County. Inspired by both community voices and extensive research, the Vision Statement expresses the aspirations for this plan while the Mission Statement describes how Grand County and its Economic Development Department can fulfill them.

VISION

For one of the most beautiful places on the planet also to be among the best places to live, play, work, or do business.

MISSION

To pair the region's magnificent natural advantages with human ingenuity to power an economy delivering positive outcomes for people and places in Grand County.

THREE PATHWAYS TO SUCCESS

Fulfilling the vision of the Trail to Tomorrow plan will require attention to three main goals, described in this plan as Pathways. Each represents a distinct opportunity for Grand County to advance its economy in ways that improve local quality of life while enhancing the quality of its places. Each Pathway is connected to the others. Progress on one Pathway can support progress on the others.

1

PATHWAY 1
Address the fundamentals.

Before Grand County can diversify or build its economy over the long term, the basics must be put into place. To create a healthy, balanced economy, it will be vital over the next five years to tackle the single biggest challenge, a housing shortage that is tied to the workforce shortage. Attracting new employers and employees will require other essentials as well, including more buildable land, additional air connections, and quality of life improvements. Each of these initiatives will require significant investments of time and resources and a shared resolve for Grand County to grow and change.

2

PATHWAY 2
Grow “tourism-adjacent” businesses and support entrepreneurship.

Grand County’s best avenue for near-term economic development is to support business activity with light demands on local infrastructure, mainly by supporting the growth of small local enterprises that draw strength from the visitor economy. A key is investing in infrastructure or initiatives that can turn people with talents and creativity into entrepreneurs. This approach can be tailored to support food production, artist spaces, home-based businesses, a year-round wedding economy or other opportunities that arise. Other possibilities lie in tapping the powerful Moab brand to leverage unique strengths, including the region’s search and rescue expertise and its new USU-Moab campus.

3

PATHWAY 3
Engineer tourism to support community happiness and quality of place.

With its vital visitor economy softening and its community divided over the value of its biggest economic driver, Grand County can find solutions by managing tourism to achieve more positive outcomes. This starts with targeting optimal visitors, supporting experiences that are in sync with local priorities, and managing visitor flows throughout the year to build a thriving, sustainable tourism economy. It also involves working with state, federal and local land managers to optimize enjoyment of key natural resources and promoting good stewardship of Grand County places.

THE WAY AHEAD

TRAIL TO TOMORROW PLAN OVERVIEW

VISION

For one of the most beautiful places on the planet also to be among the best places to live, play, work, or do business.

MISSION

To pair the region's magnificent natural advantages with human ingenuity to power an economy delivering positive outcomes for people and places in Grand County.

PATHWAY 1

Address the fundamentals.

Housing • Workforce • Air Service • Buildable Land • Noise & Traffic Mitigation

PATHWAY 2

Grow "tourism-adjacent" businesses and support entrepreneurship.

Entrepreneurs • Incubators • Training Ground • Creative Economy • Weddings • Nonprofits

PATHWAY 3

Engineer tourism to support community happiness and quality of place.

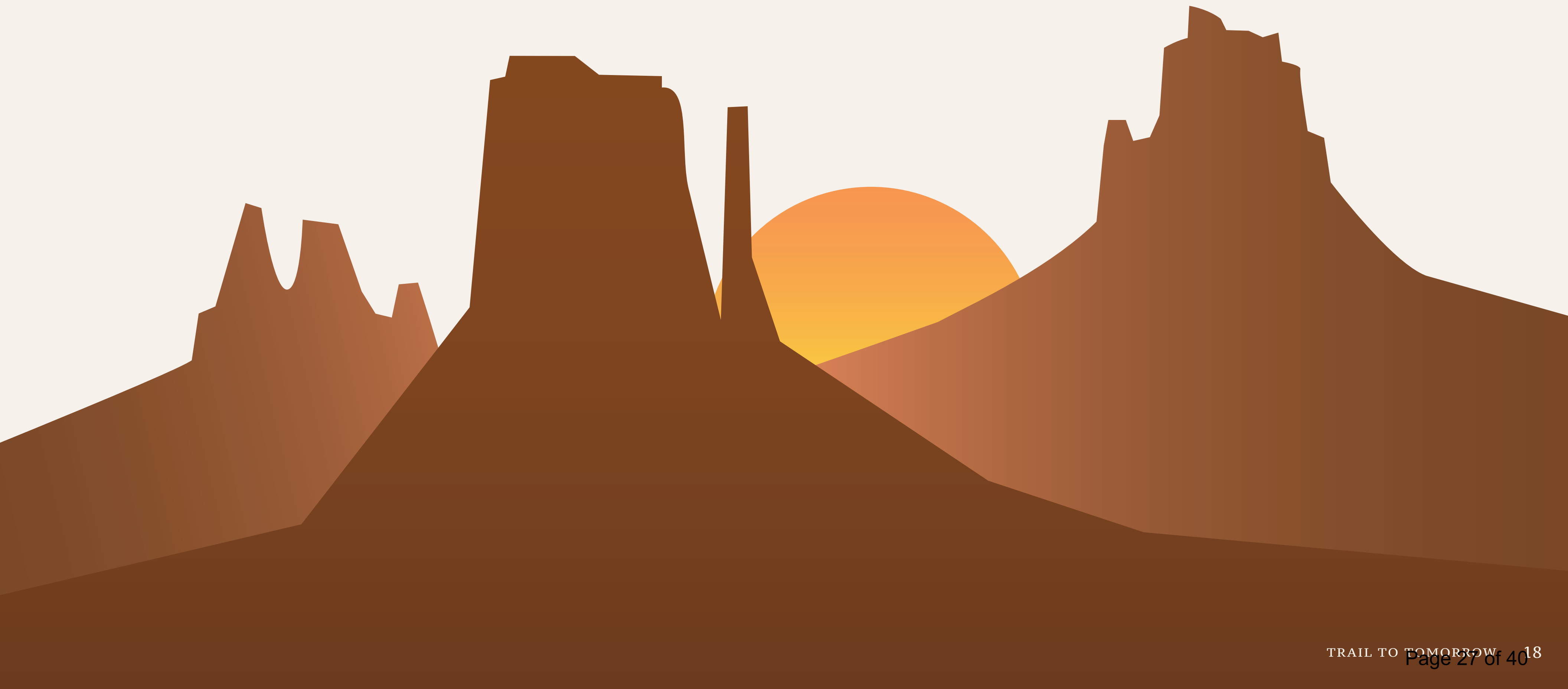
Valued visitors • New offerings • Visitor Flows • Optimize Uses • Film • Stewardship

THE WAY AHEAD

THE ACTION PLAN

Implementing a vision requires many actions that take an organization step by step to its larger goals. To guide Grand County toward its vision of making the county one of the best places to live, play, work or do business, this action plan identifies the steps that are needed to overcome barriers and make the most of the county's many opportunities.

Strategies, action steps and success measures are provided for each of the three Pathways. Many of the strategies and action steps described in the following pages represent a beginning. Some actions can be completed during the next five years while others will require ongoing effort. The power of a plan is in providing an organization with a sharp focus to ensure that its actions and resources keep making progress toward a shared vision. For the Grand County EDD, the ultimate success will be to improve the quality of life and place in Grand County.



THE ACTION PLAN - PATHWAY 1

ADDRESS THE FUNDAMENTALS.

Before Grand County can diversify or build its economy over the long term, the basics must be put into place. To create a healthy, balanced economy, it will be vital over the next five years to tackle the single biggest challenge, a housing shortage that is tied to the workforce shortage. Attracting new employers and employees will require other essentials as well, including more buildable land, additional air connections, and quality of life improvements. Each of these initiatives will require significant investments of time and resources and a shared resolve for Grand County to grow and change.

STRATEGIES AND ACTIONS

A. Support expanding the availability and affordability of housing.

1. Establish a point person to seek ways of stimulating housing development. Engage a full-time expert resource, whether contractually or on staff, to identify possibilities for fast-tracking development of more housing, especially for Grand County workers.

2. Seek ways to incentivize development of workforce housing. Explore opportunities to make projects pencil by reducing costs of land, providing tax incentives, securing grants, or offsetting cost of infrastructure such as roads or utilities.

3. Explore opportunities to fast track zoning or permits for projects with wide community support. Seek ways to eliminate barriers to expedite county reviews of projects that will provide additional workforce housing. Establish standards and policies to ensure that housing is made available for Grand County workers.

4. Examine the potential of public-private partnerships. Seek ways to connect private developers and nonprofit organizations to fund and construct more workforce housing.

5. Consider strategies to create more buildable land for housing. Support reviewing county land use policies to identify possibilities for expansion of housing or development of denser housing. Explore potential for long-term leasing or allocation of public lands, especially state-owned lands, to support development of workforce housing.

6. Seek development of designated areas for "van lifers." As a temporary measure, support developing designated places for local workers living in vehicles or other temporary arrangements. Provide showers, running water and other amenities to provide better living conditions for these workers while freeing up public places.

7. Housing Trust Fund. Establish a local housing trust fund to support the development and preservation of more housing.

B. Foster development of a skilled workforce.

1. Support vocational training programs. Encourage USU-Moab and Grand County High School to tailor vocational training programs to the needs of local industries and organizations. Explore the potential for establishing a USU-Moab hospitality training with on-the-job training in local hotels, resorts, and restaurants.

2. Seek creation of apprenticeship programs. Support development of apprenticeships in collaboration with local businesses to provide hands-on experience and job training.

3. Encourage scholarship and grant programs. Support development of scholarships and grants for residents pursuing education and training in high-demand fields.

4. Support efforts to improve English language instruction. Improve the ability of Grand County's non-English-speaking residents to fill gaps in the local workforce by supporting more opportunities for language training.

THE ACTION PLAN - PATHWAY 1

ADDRESS THE FUNDAMENTALS.

C. Seek to expand air service connections.

1. Support efforts to secure new routes for Canyonlands Regional Airport. Share insights to identify high-potential routes. Provide marketing incentives to attract flights.

2. Support improvement of airport Infrastructure. Support extension of water service and other infrastructure to open up business development near the airport and potentially attract interest from carriers.

3. Partner with neighboring tourism boards. Collaborate with neighboring economic development organizations to make a case for increased air service at Canyonlands.

D. Encourage strategies to identify more buildable land for business.

1. Support revising the General Plan to open up nodes for business development off U.S. 191. Consider conducting a study to identify types of businesses that would be interested in relocating or expanding operations. Establish parameters for attracting businesses that would benefit the local economy.

2. Seek review of policies for zoning business. Encourage consideration of whether zoning policies are creating obstacles for attraction of desirable businesses.

3. Consider initiatives to attract new businesses. Assess the need for incentive or marketing programs to attract desirable businesses to new building sites.

E. Support strategies to mitigate noise and traffic, especially through downtown Moab.

1. Seek ways to reduce heavy truck traffic through downtown Moab. Encourage collaborations to identify innovative solutions. Consider the potential for working with UDOT and other entities to direct long-haul truck traffic to routes that bypass Moab.

2. Support efforts to reduce vehicle noise. Continue to seek backing for strategies to reduce noise from heavy trucks and other vehicles.

3. Encourage development of additional transit options. Collaborate to evaluate the potential of an Arches shuttle system to reduce vehicle traffic on U.S. 191. Encourage exploration of establishing a transit hub at UMTRA site.

4. Support development of additional pedestrian and bicycle infrastructure. Encourage alternative modes of transportation to reduce traffic and enhance safety.

THE ACTION PLAN - PATHWAY 2

GROW “TOURISM-ADJACENT” BUSINESSES AND SUPPORT ENTREPRENEURSHIP.

Grand County’s best avenue for near-term economic development is through growth of small local enterprises with light demands on local resources and that draw strength from the visitor economy. A key is investing in infrastructure or initiatives that can turn people with talents and creativity into entrepreneurs. This approach can be tailored to support food production, technical training, artist spaces, home-based businesses, a year-round wedding economy or other opportunities. Other possibilities lie in tapping the powerful Moab brand to leverage unique strengths.

STRATEGIES AND ACTIONS

A. Support growth of a connected, supportive community of entrepreneurs interested in integrating work with a passion for outdoor recreation.

1. **Seek support for incentivizing startup outdoor recreation businesses to choose Grand County.** Explore creating a development zone offering tax offsets to outdoor-related businesses meeting local criteria.

2. **Consider developing microgrants or establishing funds to support small business startups.** Establish a funding mechanism to offset startup costs for business that align with Grand County priorities.

3. **Build a sense of community through networking and social events.** Support development of networking events, workshops, social gatherings, and outdoor experiences tailored to Grand County entrepreneurs. This can build a sense of community, create opportunities for collaboration and knowledge sharing, and attract other outdoor entrepreneurs.

4. **Attract new entrepreneurs.** As opportunities for new housing and business spaces come online, develop a campaign to target footloose entrepreneurs, emphasizing the lifestyle benefits, natural beauty, and work-friendly environment of Grand County. Use social media, blogs, PR, and partnerships with business or travel influencers to spread the word.

B. Support small business incubators and the growth of home-based businesses.

1. **Seek support for streamlining licensing and restrictions.** Convene entrepreneurs and economic development partners in discussions to identify factors inhibiting business development. Work with city and county development officials to craft solutions that can facilitate and streamline creation of desirable new businesses.

2. **Explore potential for establishing a business incubator.** Assess interest in creating co-working or co-production spaces for business startups or expansions. Seek support for compiling an inventory of spaces with potential to accommodate interest. Explore possibilities for state or federally funded economic development organizations to provide technical assistance and support for an incubator.

3. **Local Support Services.** Offer services that support remote work and entrepreneurship, such as business centers, printing and mailing services, and access to local mentors or business advisors.

4. **Seek support for improving internet connectivity.** Collaborate with key partners to maximize opportunities for enhancing the reliability and speed of this essential business tool.

5. **Consider spearheading development of a multi-user commercial kitchen.** Identify interest in establishing a quality commercial kitchen that could support a variety of early-stage culinary entrepreneurs or food preparation local food truck operators. Explore the potential of converting underused, existing facilities, such as the high school’s commercial kitchen, for this use.

THE ACTION PLAN - PATHWAY 2

GROW "TOURISM-ADJACENT" BUSINESSES AND SUPPORT ENTREPRENEURSHIP.

C. Explore the potential for developing Grand County as a premier training ground for search and rescue operations.

1. Assess interest in leveraging local expertise and the diversity of landscapes to establish Grand County as the national center of excellence for Search and Rescue (SAR). Explore partnering with USU-Moab to study the feasibility of establishing a national training center for SAR teams as well as outdoor enthusiasts interested in sharpening rescue or survival skills. This fee-based initiative could be structured to fill lodgings in less-busy seasons and attract visitors whose interests dovetail with the local ethos.

2. Consider starting small and use momentum to expand. Establish the initiative by centering on rescue activities generating the most interest. As momentum develops, expand offerings to share Moab know-how in other areas of interest for outdoor enthusiasts.

3. Use this heightened identity to build the brand and as a focus for attracting adjacent expertise or related outdoor manufacturing. As initiatives highlighting Grand County's outdoor expertise evolve, incorporate this enhanced identity in promotional initiatives and business-to-business communications to further build Moab's standing as the continent's premier outdoor recreation destination.

D. Foster a vibrant creative economy by nurturing local talent, supporting small enterprises, and integrating arts and culture into community development.

1. Encourage development of creative hubs. Support efforts to create dedicated spaces for local artists, designers, and creative professionals to work, collaborate, and showcase their work.

2. Fund initiatives to expand the county's arts culture. Allocate funding, potentially through rural grants, to advance the interests of local artists, creative startups, and cultural initiatives.

3. Support development of cultural events and festivals. In keeping with the county's events strategy, encourage promoting local creativity through cultural events, markets, and festivals.

4. Find ways to stimulate visitor interest in supporting local arts and culture. Showcase local artists in promotional channels and relevant interpretive signage and support events (in keeping with the events strategy) that promote local creativity.

5. Seek to integrate art into public spaces. Collaborate to support public art installations, murals, and performances to enhance community spaces and make art a consistent part of the Moab brand and experience.

6. Support enhancement and development of cultural venues. Support efforts to enhance existing cultural venues. Evaluate the feasibility of establishing a riverside amphitheater at the UMTRA site to host live performances, cultural events, and community gatherings.

GROW "TOURISM-ADJACENT" BUSINESSES AND SUPPORT ENTREPRENEURSHIP.

E. Develop the county's potential as a premier wedding destination to support a year-round visitor economy and new opportunities for small businesses and creators.

1. Showcase Grand County's potential as a wedding destination. Develop promotional materials and a wedding planning guide to demonstrate the extraordinary range of settings and experiences where couples and their guests can create lifelong memories.

2. Develop an inventory of Grand County businesses and organizations that can support wedding needs. Create a reference to local caterers, bakers, rental equipment, photographers and videographers, musicians, officiants, authorized venues, lodgings, and restaurants with capacity to support weddings. This can also include outfitter experiences whether for entertaining guests or supporting unique weddings, such as on horseback, a raft, or a UTV.

3. Work with Public Land agencies to identify acceptable outdoor venues for wedding parties and establish appropriate permitting processes. Collaborate with public land managers to develop best practices for wedding parties, especially to limit potential for impacts.

F. Leverage the power of local nonprofits and philanthropists to mentor entrepreneurs, support new enterprises, and stimulate visitor giving.

1. Engage the expertise of local professionals and retirees in mentorships. Grand County is home to a multitude of people with strong professional backgrounds who can serve as an important resource for early stage, small entrepreneurs. Consider creating a Grand County Professional Development Advisory Group to leverage these valuable local capabilities.

2. Consider supporting a centralized resource center for the county's nonprofits to reduce overhead costs and build capacity. Many of the county's estimated 150 nonprofits have limited resources to fulfill their missions. Support establishing a fee-based resource center providing bookkeeping, grant writing, and other services for nonprofits — especially as a revenue generator for a local nonprofit or entrepreneur.

3. Encourage nonprofits to identify a shared focus for visitor giving. Invite nonprofits to simplify the act of giving for visitors by creating a shared focus around a compelling issue, such as housing. Proceeds can be shared among relevant nonprofits.

THE ACTION PLAN - PATHWAY 3

ENGINEER TOURISM TO SUPPORT COMMUNITY HAPPINESS.

With its vital visitor economy softening and its community divided over the value of its biggest economic driver, Grand County can find solutions by managing tourism to achieve more positive outcomes. This starts with targeting optimal visitors, supporting experiences that are in sync with local priorities, and managing visitor flows throughout the year to build a thriving, sustainable tourism economy. It also involves working with state, federal and local land managers to optimize enjoyment of key natural resources and promoting good stewardship of Grand County places.

STRATEGIES AND ACTIONS

A. Attract visitors most likely to generate positive impacts and who will share respect for Grand County places.

1. Seek ongoing insight into the county's optimal visitors. Continually assess and identify visitors with the highest potential to support long-term objectives for a healthy Grand County tourism economy.

2. Seek visitors who care about natural resources. Shape messaging and media buys to prioritize attracting visitors — across all targeted market segments — who are inclined to share care for outdoor spaces and local communities.

3. Broaden the appeal of the most diverse range of outdoor offerings in the U.S. Segment targeted travelers based on their level of interest and ability to navigate the region's outdoor experiences. Evolve campaign strategy based on how each segment — Sightseers, Overlappers, or Adventurers — delivers benefits for Grand County.

4. Consider using guided experiences as a primary call to action. Frame Grand County's stellar collection of outfitted experiences as a compelling reason to visit and to deliver strong benefits for local entrepreneurs and outfitters.

5. Partner with the Rocky Mountaineer to build ridership to Moab. Collaborate to address challenges and opportunities for this prestigious operator to support an important source of summer and international visitation.

6. Target international markets prioritized by the Utah Office of Tourism (UOT). Leverage the expertise, insights, and opportunities created by this valuable resource to attract high-potential international travelers.

B. Support tourism development that enhances local quality of life while attracting optimal visitors.

1. Support "Moab-style" arts and culture offerings. Encourage development of unique cultural experiences that reflect local heritage and the region's outdoor ethos, such as the Moab Music Festival.

2. Disperse visitation by creating new named experiences. Build awareness and use of less-visited scenic places through creative naming and development of new outdoor "attractions." Focus on creating compelling alternatives to Delicate Arch.

3. Serve cultural travelers year-round by collaborating to develop trails that celebrate Grand County people and history. Possibilities include curating trails that recognize the county's tribal cultures or dinosaur, film, or uranium history, with the Moab Museum as the jumping off point. Ensure that all trails and artifacts have wayfinding and interpretation to alert visitors to their value and how to avoid impacting them. Open up conversations with local tribes to discuss best approaches for interpreting tribal culture.

4. Develop the county's potential as a Dark Sky destination. To maximize Dark Sky designations for the region's three main parks and Moab, establish a Dark Sky Working Group to explore collaborations. Consider potential for developing outfitted nocturnal experiences, including cowboy storytelling, full moon hikes, artistic experiences, introductions to nocturnal creatures, or other Grand County-only experiences. Craft a Grand County version of the UOT's Dark Sky Beginners Guide to provide visitors with a "how-to" manual.

THE ACTION PLAN - PATHWAY 3

ENGINEER TOURISM TO SUPPORT COMMUNITY HAPPINESS

C. Manage visitor flows to support a year-round economy.

1. Use visitation model to gain and share ongoing insights into visitor flows. Incorporate findings into tourism management strategies. Regularly share insights with the community to set expectations about visitor volumes and build understanding of the county's biggest economic driver.

2. Collaborate on an event strategy. Convene discussions to establish a year-round event calendar. Identify opportunities for new events to build desirable visitor volume or to reschedule existing events to less busy seasons. Use this calendar in advising event organizers or evaluating applications for event permits.

3. Develop a "comfort and compression" calendar to manage marketing. Create a companion calendar to identify low-occupancy times of the year, whether by mid-week, week or month when the county wishes to accommodate higher levels of visitation. Use this to plan special promotions, events, or media flights to maintain a healthy visitor economy.

4. Stimulate off-peak visitation by developing packages and promotions. Work with local operators to create and promote themed campaigns offering deals on hotels, dining, and other experiences at off-peak times.

5. Explore potential for an event or conference center. Explore interest in funding a feasibility study to assess potential for attracting small conferences and events aligned with the county's outdoor ethos, especially during non-peak seasons.

6. Consider supporting a moratorium on new vacation rentals. To support the viability of existing and previously authorized hotel inventory, consider supporting a cap on licensing of new vacation rentals until desirable average occupancy levels are achieved.

7. Support enforcement of short-term rental permits and regulations. Support actions to ensure that all lodging partners comply with county requirements and manage disruptive guests.

D. Collaborate with land managers and user groups to optimize the enjoyment and use of key natural resources, especially Arches National Park.

1. Work with land managers and outfitters to classify activities as easy, moderate, and difficult. Guide visitors to experiences they can handle, both to broaden the appeal of the region's outdoor offerings and reduce impacts on Search and Rescue operations.

2. Seek voluntary resolution of user conflicts. Convene various user groups, including the off-roading community, to build unity around solutions to disruptive problems. Learn from the model of the Trail Mix community, which brought together horseback riders, mountain bikers, and hikers to resolve trail conflicts. Moab's Leave No Trace Gold Standard Trail Ambassador program also provides an excellent model.

3. Support addressing user conflicts by creating new experiences. Assist in establishing alternatives to satisfy interests and mitigate tensions.

4. Seek support for Arches to continue adapting the reservation system. Continue to monitor and request enhancements to timed-entry policies, especially to reduce the impact of "no-shows."

THE ACTION PLAN - PATHWAY 3

ENGINEER TOURISM TO SUPPORT COMMUNITY HAPPINESS.

E. Support efforts to attract video and film projects as a vital contributor to the local brand and tourism economy.

1. Continue to support requests for production support. Ensure that the EDD is equipped to assist producers and the Utah Film Office in scouting locations and identifying local talent and support.

2. Empower the EDD to attract productions that benefit Grand County. Seek support for incentives and other tools to attract video and film-related projects that serve local interests. Consider developing a matrix to identify projects that meet local standards for support.

F. Address impacts of visitation on Grand County's quality of place and promote good stewardship of natural resources.

1. Develop stewardship messaging that invites visitors to share in the local ethos. Consider reviving or evolving the "Do It Like A Local Campaign" with specific advice for different user groups.

2. Advance low-impact travel experiences. Consider partnering with Green Destinations on its new Good Travel initiative, giving local operators a way to achieve global certification of their products to recognized, reliable standards for sustainability.

3. Create a focus for visitor giving. Establish simple ways for conscientious visitors to give back to the community during their stays. One possibility: Invite visitors to contribute to a unified fund supporting nonprofits that are advancing local quality of life.

4. Consider equipping locals with a tool to reward positive visitor behavior. Establish a budget amount to provide locals with tokens to share with visitors who exemplify positive Moab/Grand County vibes or behaviors.

ROLE OF THE EDD

As directed by Grand County's RFP for this planning process, the Trail to Tomorrow plan lays out a comprehensive agenda to guide the Grand County Economic Development Department (EDD) in building the county's economy while enhancing quality of life and place. The RFP also sought a review of the EDD's current positioning and focus and recommendations for improvement. An initial review of the EDD's focus was shared as part of the Situation Analysis shared in May 2024. Recommendations for strengthening the EDD are provided below.

Implementing this plan over the next five years will require resources and expertise beyond what is available to the EDD's current staff of three, two of whom have less than a year of experience in their roles and collectively manage a highly complex set of responsibilities. The EDD serves as the county's economic development agency, its destination marketing/ management organization (DMO), and its film office. Additionally, it is responsible for collaborating with three different stakeholder groups:

- **The Economic Development Advisory Board (EDAB)**, charged with fostering economic diversity and resilience.
- **The Moab Area Travel Council Advisory Board,** which recommends the best use of TRT and TRCC taxes and the annual marketing budget and plan. It is responsible for promoting and encouraging local tourism to help broaden and strengthen the county's economic base.
- **The Moab to Monument Valley Film Commission**, the oldest local film commission in the US. It was established to develop the local economy by attracting producers of film and video projects and now operates as a public-private partnership.

The EDD's Film Commissioner is a highly accomplished professional with significant film industry experience and operates at a high level as an office of one. However, the EDD's other two vital functions appear to be seriously understaffed.

Destination Management: The purpose of a DMO is to support the health of a visitor economy, typically through promotional activities to attract visitors and to measure the economic impact of various initiatives. The role has evolved in recent years to encompass destination management. Under this model, priorities shift to attracting valued visitors at optimal times, developing strategies to manage visitor impacts, and supporting development of new experiences serving not only visitors but the local community. It is recommended that the EDD embrace the role of a Destination Management Organization in overseeing the county's visitor economy. DMOs also are brand-builders, attracting not only desirable visitors but enhancing a destination's reputation as a good place to live, work or attend school. Just as the Utah Office of Tourism creates an umbrella brand for the entire state of Utah, the EDD's job is to build a strong brand for Grand County. In a highly competitive environment like Grand County's, this requires consistent investment, effort, and expertise. To achieve the full potential of Pathway 3 recommendations will require acquisition of marketing expertise, whether contractually or on staff, to manage the many functions of a DMO.

Economic Development: The task of implementing Pathway 1 and Pathway 2 initiatives also will require additional expertise. It is recommended that Grand County identify a resource or staff dedicated to fast-tracking solutions for workforce housing to address the biggest barrier to a healthy county economy. The EDD also would benefit greatly from hiring at least one economic development professional to guide initiatives to create economic opportunities and foster entrepreneurship.

TRAIL MARKERS

VISITATION MODEL

To provide Grand County with a tool for estimating visitation levels for various initiatives, RRC Associates developed a new visitation demand model in summer 2024.

Several keys to the consideration of variables to include in the model are: (1) the reliability of the estimation or counting procedures; (2) consistent availability of monthly data over multiple years, with annotation available for any changes in collection or estimation; and (3) demonstrable relationship between the variable and total visitation. With these keys at hand, National Park visitation estimation performs exceptionally well in relating visitation estimates to taxable sales, TRT revenue, and lodging demand. Additionally, the NPS has conducted multiple surveys in recent years that allows segmentation of its visitors such that they may be further related to expenditures and lodging types. Specifically, using monthly data from 2012-2019, 88% of the variation in Sales Tax (Retail + Services) can be explained by Recreation visits to Arches NP alone. Similarly, 91% can be explained by recreation visits to Canyonlands NP over this same time period. Further, visitation to either National Park explains 88% of the variation in hotel room nights booked.

Considering these factors, it is believed the model provides a strong and flexible foundation for estimates. In 2023, Arches recorded nearly 1.5 million recreation visits, translating to a demand for just over 483,000 hotel room nights and representing 72% of all Hotel room nights that year. The 1.5 million visits further translates to nearly 352,000 unique groups visiting Arches, based on survey estimated group size and reentry rates to the parks. Visitation to Grand County is then estimated at 490,000 overnight groups in 2023, suggesting approximately 28% of visitors are experiencing other activities other that do not include Arches Park. Lastly, results of the 2024 Grand County visitor perception study show that 79% of Grand County visitors stayed more than one day. Thus, total visitation, including both day and overnight visitors, can be estimated at nearly 1.8 million visitors, making up just over 620,000 groups.

Estimating visitation based on reported values of related variables is the first step in representation of the visitor landscape. The next is developing a means by which estimations may be created moving forward to aide planning and scenario building. Such scenarios may include those related to travel costs (lodging rates, fuel, etc.). Previous research by members of the Trail to Tomorrow team shows that a 1% increase in travel cost results in a 0.4% decrease in visitation to both Arches and Canyonlands. On the flip side, that same research shows that visitation to large western National Parks increases .09% for every 1% increase in consumer sentiment.

The visitation demand model develops insights based on data sources currently available to Grand County. These include:

- Public Lands Visitation data
- Hotel and short-term rental demand
- Taxable sales for retail and services
- Transient Room Tax (TRT) revenue
- Survey findings (National Park Visitor Surveys, Grand County Visitor Perception Survey)
- Consumer Price Index/inflation measures
- Fuel prices
- Consumer sentiment

Maintaining a visitation model with quality and diverse data is crucial for meeting the objectives of an economic and tourism strategic plan. By providing comprehensive insights into visitor behavior, preferences, and trends, such a model enables informed decision-making, optimizes resource allocation, and enhances the visitor experience, all while promoting sustainable growth and maximizing economic and community benefits for the destination. Specifically, such a model, in conjunction with other robust data sources already at the county's disposal and analyses can inform:

Strategic Planning

- Informed Decision Making: Provides data-driven insights to support strategic planning and resource allocation.
- Forecasting and Trend Analysis: Helps predict future visitation patterns, allowing for better preparedness and adaptation to changing trends.

Economic Impact

- Revenue Optimization: Assists in identifying peak and off-peak seasons, enabling dynamic pricing strategies to maximize revenue.
- Investment Justification: Supports investment in infrastructure and services by providing evidence of potential returns and benefits.

Visitor Experience

- Enhanced Visitor Management: Aids in managing visitor flow to reduce congestion and improve overall visitor satisfaction.
- Customized Offerings: Facilitates the development of tailored marketing and service offerings based on visitor preferences and behavior.

Competitive Advantage

- Benchmarking: Allows comparison with similar destinations, identifying strengths and areas for improvement.
- Marketing Effectiveness: Evaluates the impact of marketing campaigns, refining strategies to attract target visitor segments.

Risk Management

- Scenario Planning: Prepares for various scenarios (economic shifts, natural disasters) to mitigate risks and ensure resilience.
- Policy Development: Informs policy decisions related to tourism regulation, infrastructure development, and conservation efforts.

By leveraging a visitation model, Moab can enhance its appeal as a tourist destination, improve economic outcomes, and ensure sustainable and enjoyable experiences for visitors. This model is being delivered to the Economic Development Department in an excel based tool and user guide that draws on historical relationships and inputs on current and expected conditions to enable planning.

TRAIL MARKERS

MEASURES OF SUCCESS

Success measures have been identified to track progress for each of the three Pathways. Each measure is tied to important outcomes that the EDD is equipped to measure.

Pathway 1

- Additional housing units.
- Percentage of housing units available at 30% or less of median area income.
- Job growth in tourism and non-tourism related sectors. (U.S. Bureau of Labor Statistics)
- Analysis of noise levels at key locations in Moab. (Requires monitoring system)
- Flights and frequency from Canyonlands Regional Airport.

Pathway 2

- New business permits, tracked by category.
- (Additional measures to be established as new initiatives are launched)

Pathway 3

- Lodging occupancy rates.
- Taxable sales.
- Resident sentiment. (To be conducted at regular intervals)

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