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WILLARD CITY, UTAH

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DRAFT ECONOMIC DEVELOPMENT
STRATEGIC PLAN

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SECTION 1. EXECUTIVE SUMMARY

LRB Public Finance Advisors (LRB) was contracted by Willard City (the City) to create an Economic Development Strategic Plan (the Plan). This Plan is designed to assist the City with the evaluation of current economic trends that affect the City, as well as South Willard, and determine supportable commercial development. To fulfill this goal, LRB conducted several tasks of due diligence which are listed below:

- Socioeconomic and Demographic Overview:** Economic markets are heavily influenced by demographics and socioeconomics. Focusing on measurements such as population, income levels, education, infrastructure investment, industry, and the existing workforce helps us to understand the current market characteristics that are causing the underlying economy in Willard and South Willard to thrive or decline.
- Sales Tax Leakage and Capture Analysis:** Taxable sales provide an important metric to assess the general economic health of the City. Using CY 2021 - 2023 sales tax data, this Plan identifies industries and sectors with opportunity for growth within the City. This analysis also identifies the kinds of goods and services demanded by residents.
- Market Conditions:** Assessing the Willard area's feasibility to develop commercial activity includes an analysis of land use and zoning, location, competitive market sites, types of development, and tourism considerations.
- Site Location Analysis:** LRB and stakeholders identified 750 North, along the I-15 intersection, as a potential commercial node to provide opportunities for cultivation of economic development in the City.
- Stakeholder Outreach and SWOT:** Two stakeholder meetings were held in order to bring together City staff, business leaders and owners, influential residents, and development partners to gain a holistic view of what is needed in the Plan. Responses from stakeholders are utilized to develop the economic development strategies outlined below.

As Willard City works towards its goals and values, the Plan will be crucial in guiding the development efforts of the City. The remainder of the report will feature several sections further explaining the research efforts performed by LRB to derive the Plan. The Economic Development Strategic Plan is summarized below and is featured in more detail in **Section 6**.



This Plan was drafted to coexist with and support the 2023 General Plan of Willard City. The City's Value Statement states, "Our community recognizes its history and will preserve its small-town character and sense of place by protecting its open spaces, agricultural and sensitive lands, and protecting and fostering a high quality of life for all residents." There are eight distinct City goals listed within the General Plan's Land Use Element that align with the City's Value Statement. LRB ensured that the Plan coincides with the values of the General Plan.

- Evaluate all City decisions, actions, and budget expenditures to achieve General Plan consistency.
- Protect the City's naturally occurring sensitive lands, views, features, and other amenities.
- Protect the City's agricultural areas.
- Promote efficiencies in the use of all water resources and protect local water sources.
- Encourage retail businesses to support the City's tax and employment base and to provide additional opportunities for residents to meet their daily living needs in Willard.
- Increase opportunities for all residents to engage in remote work and learning.
- Protect and enhance Willard's historic town core.
- Continue to require quality developments that promote and enhance the City's small-town character and ambiance and to remain a safe and desired location for residential and nonresidential uses.

LRB suggests the following strategies to reflect stakeholder responses, with the City's objectives and existing strategies for economic development serving as the foundational objectives.

- 1. GROW A FOUR-SEASON RECREATION AND AGRI-TOURISM ECONOMY:** Leverage Willard's strengths— Willard Bay State Park, hiking trails, fruit farms, and future South Willard annexation— to drive visitor spending while reinforcing small-town character.
- 2. DIVERSIFY THE TAX BASE WITH JOB-CREATING LIGHT INDUSTRIAL & MIXED-USE NODES:** Convert annexed South Willard land and the north industrial corridor (north of Flying J) into employment and neighborhood-scale retail to reduce reliance on rooftops.
- 3. MODERNIZE WATER AND GROWTH INFRASTRUCTURE TO UNLOCK CAPACITY WITHOUT LOSING RURAL CHARACTER:** The City has water rights but needs delivery capacity and sequencing. With an aging water system and wetland preservation and service limits, growth is constrained and risk is increased.
- 4. MANAGE GROWTH TO PROTECT FARMS, NEIGHBORHOODS, AND VIEWSHEDS:** Community concern over development and gravel pits requires predictable, place-sensitive growth that preserves agriculture and quality of life.

SECTION 2. SOCIOECONOMIC AND DEMOGRAPHICS ANALYSIS

In recent years, the State of Utah has experienced robust growth in both population and employment opportunities. As of April 2025, the State unemployment rate was measured at 3.1 percent, compared with the national average of 4.2 percent. Population and employment characteristics are helpful indicators of overall economic health. As economies expand, typically population increases and unemployment rates decline, which is true of both the Utah and national economy. Comparing population and employment trends is helpful in understanding the local economy.

Economic markets are heavily influenced by demographics, socioeconomics (income levels), education, availability of land, industry, infrastructure investment, and the existing workforce. This section focuses on many of these measurements to understand the current market characteristics that are causing the underlying economy to thrive or decline.

HISTORIC POPULATION

Willard's population grew from 2010 to 2020 at an AAGR of 1.11 percent each year according to Census redistricting data. Similarly, South Willard's population grew at an AAGR of 1.59 percent. According to the General Plan,¹ the Willard's population is expected to grow to 3,450 by 2040, which aligns with Traffic Area Zone (TAZ) data projections shown in **Table 2.3**.

TABLE 2.1: HISTORIC CENSUS POPULATION

	ACS							
	2013	2014	2015	2016	2017	2018	2019	2020
Brigham City	18,104	18,264	18,397	18,586	18,736	18,924	19,150	19,336
Farr West	5,973	6,113	6,270	6,406	6,671	6,836	7,023	7,197
North Ogden	17,570	17,743	18,006	18,289	18,525	18,943	19,392	19,930
Perry	4,476	4,529	4,566	4,630	4,717	4,828	4,971	5,090
South Willard	1,758	1,825	1,992	1,854	1,650	1,908	1,726	1,519
Willard	1,800	1,752	1,737	1,714	1,875	1,805	1,745	1,688
Box Elder County	50,160	50,613	50,991	51,528	52,182	53,001	53,946	54,953
Utah	2,813,673	2,858,111	2,903,379	2,948,427	2,993,941	3,045,350	3,096,848	3,151,239

Source: US Census Bureau, 2010 and 2020 Census Redistricting Data (PL 94-171)
US Census Bureau, American Community Survey 5-Year Estimates (DP05)

TABLE 2.1: CONT.

	ACS				DEC		
	2021	2022	2023	2013 - 2023 AAGR	2010	2020	2010 - 2020 AAGR
Brigham City	19,336	19,373	19,602	19,796	17,899	19,650	0.94%
Farr West	7,197	7,581	7,747	7,881	5,928	7,691	2.64%
North Ogden	19,930	20,703	21,065	21,473	17,357	20,916	1.88%
Perry	5,090	5,444	5,579	5,708	4512	5555	2.10%
South Willard	1,519	1,567	1,548	1,378	1,571	1,840	1.59%
Willard	1,688	1,813	1,753	2,008	1,772	1,978	1.11%
Box Elder County	54,953	56,891	58,291	59,725	49,975	57,666	1.44%
Utah	3,151,239	3,231,370	3,283,809	3,331,187	2,763,885	3,271,616	1.70%

Source: US Census Bureau, 2010 and 2020 Census Redistricting Data (PL 94-171)
US Census Bureau, American Community Survey 5-Year Estimates (DP05)

¹ Source: Willard General Plan, Figure 17



POPULATION PROJECTION

Willard's population is projected to continue to increase through 2040, reaching 3,450 persons. **Figure 2.1** displays regional population projections. The population in Box Elder County will continue to concentrate in Brigham City, Mantua, Tremonton, and Perry cities. Weber County, located directly south of the Willard area, will also experience a significant growth when compared to Box Elder County.

FIGURE 2.1: ILLUSTRATION OF POPULATION GROWTH BY TAZ IN BOX ELDER COUNTY

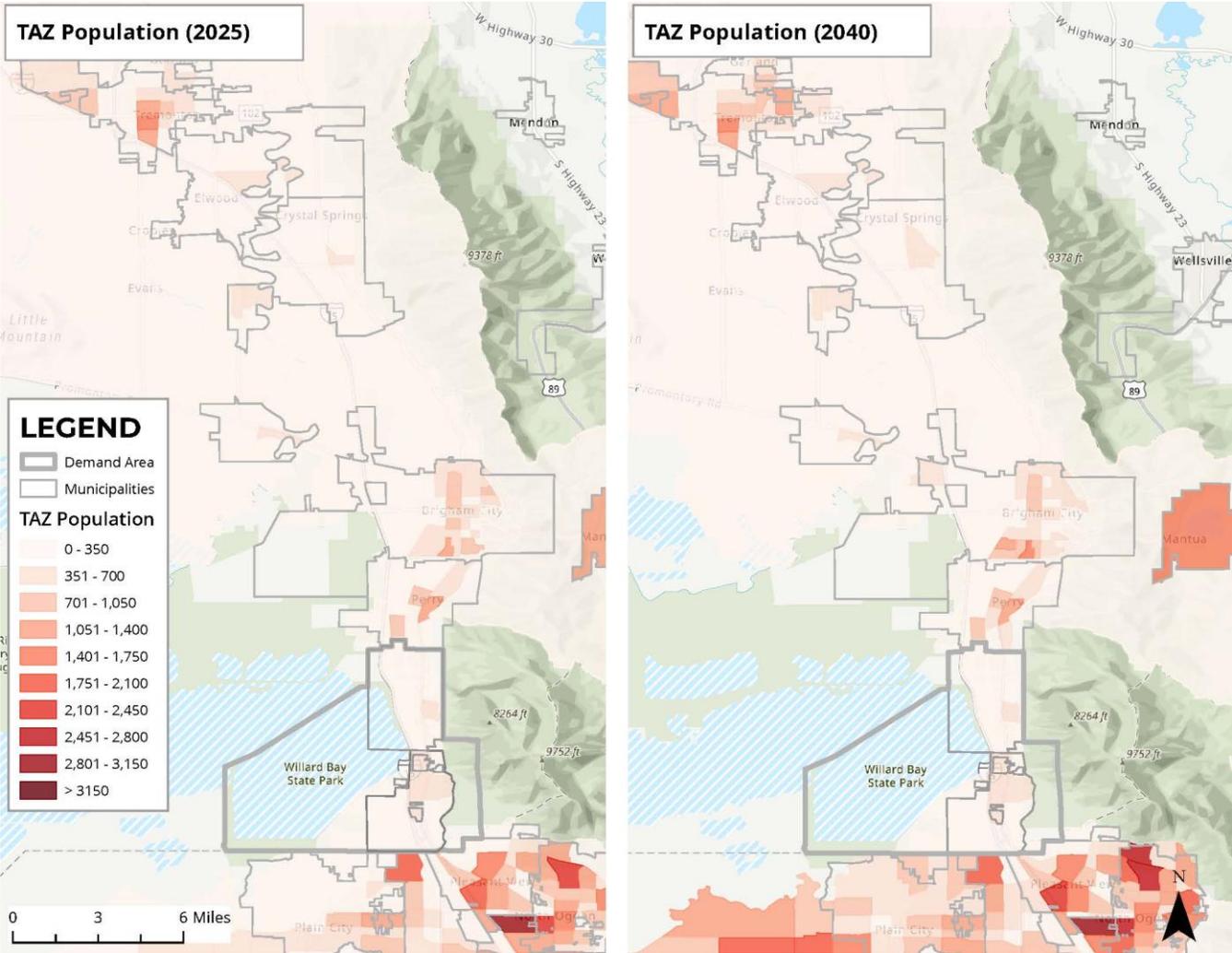


Table 2.2 illustrates historic redistricting Census for Willard and South Willard, while **Table 2.3** shows 2023 TAZ projected growth through 2040. The TAZ projections start higher than the comparable data beginning in 2024 through the projected horizon.

TABLE 2.2: SOUTH WILLARD AND WILLARD COMBINED PROJECTED POPULATION (CENSUS PROJECTIONS)

	2024	2025	2026	2027	2028	2029	2030	AAGR
South Willard	1,400	1,422	1,445	1,468	1,491	1,515	1,539	1.59%
Willard	2,030	2,053	2,075	2,098	2,122	2,145	2,169	1.11%
Total Area	3,430	3,475	3,520	3,566	3,613	3,660	3,708	1.31%

Source: US Census Bureau, 2010 and 2020 Census Redistricting Data



TABLE 2.2: CENSUS PROJECTIONS (CONT.)

	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	AAGR
South Willard	1,564	1,589	1,614	1,640	1,666	1,692	1,719	1,747	1,774	1,803	1.59%
Willard	2,193	2,217	2,241	2,266	2,291	2,317	2,342	2,368	2,394	2,421	1.11%
Total Area	3,756	3,806	3,855	3,906	3,957	4,009	4,062	4,115	4,169	4,224	1.31%

TABLE 2.3: SOUTH WILLARD AND WILLARD COMBINED PROJECTED POPULATION (TAZ PROJECTIONS)

	2024	2025	2026	2027	2028	2029	2030	AAGR
South Willard	1,909	1,930	1,950	1,968	1,984	1,999	2,013	0.89%
Willard	2,608	2,692	2,774	2,853	2,931	3,006	3,079	2.80%
Total Area	4,518	4,622	4,723	4,821	4,915	5,005	5,092	2.01%

Source: Wasatch Front Regional Council, Traffic Area Zone Projections

TABLE 2.3: TAZ PROJECTIONS (CONT.)

	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	AAGR
South Willard	2,070	2,127	2,184	2,240	2,298	2,356	2,414	2,472	2,530	2,588	2.54%
Willard	3,113	3,148	3,183	3,218	3,254	3,290	3,327	3,363	3,400	3,437	1.11%
Total Area	5,183	5,274	5,367	5,459	5,552	5,646	5,741	5,835	5,930	6,025	1.70%

Source: Wasatch Front Regional Council, Traffic Area Zone Projections

AGE

Willard City and South Willard’s demographics relative to age have shifted from 2013 to 2023. 2023 data illustrate a concentration in the 10 to 24 and 35 to 84 years of age categories. Noticeable shifts occurred in the age brackets of under 5 to 9 years of age and 25 to 34 as illustrated in **Figure 2.2**. A comparison of the median age illustrates that city residents are older than the County and younger than the State on average.

FIGURE 2.2: WILLARD AREA - AGE DISTRIBUTION

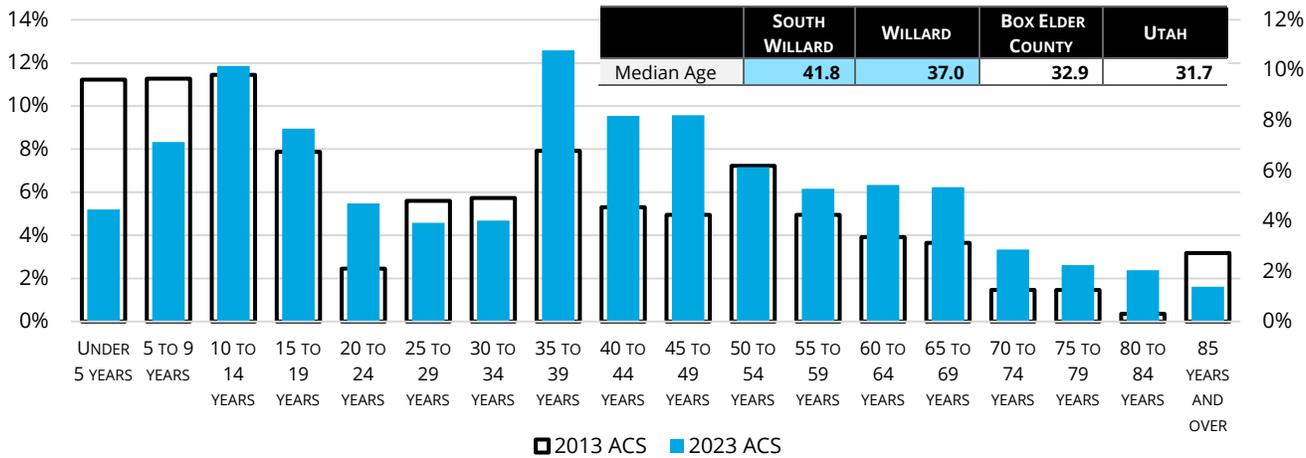
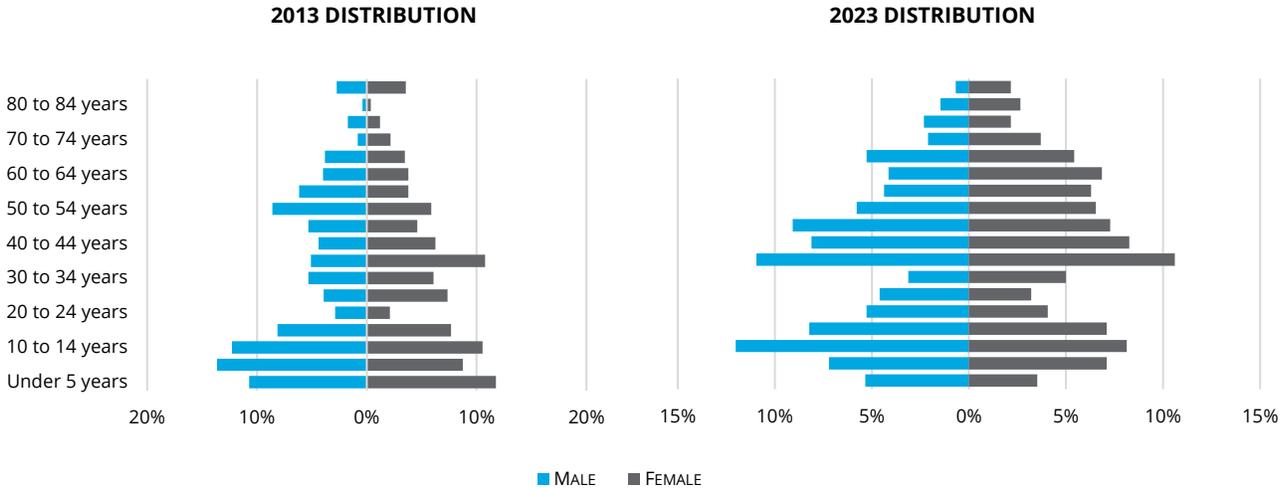


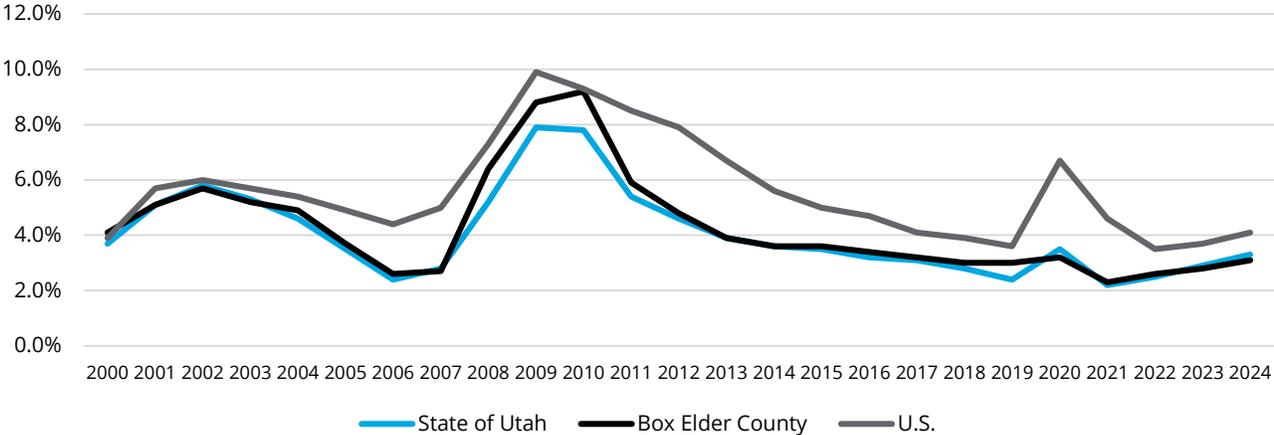
FIGURE 2.3: WILLARD AREA - AGE DISTRIBUTION BY SEX



EMPLOYMENT

The Utah Department of Workforce Services indicates the unemployment rate in Box County in December 2024 was 3.1 percent as shown in **Figure 2.4**. This is lower than the national average unemployment rate of 4.1 percent and the State of Utah’s unemployment rate at 3.3 percent. As of April 2025, the unemployment rate in Box Elder County was 2.9 percent as compared to Utah at 3.1 percent and the United States at 4.2 percent.

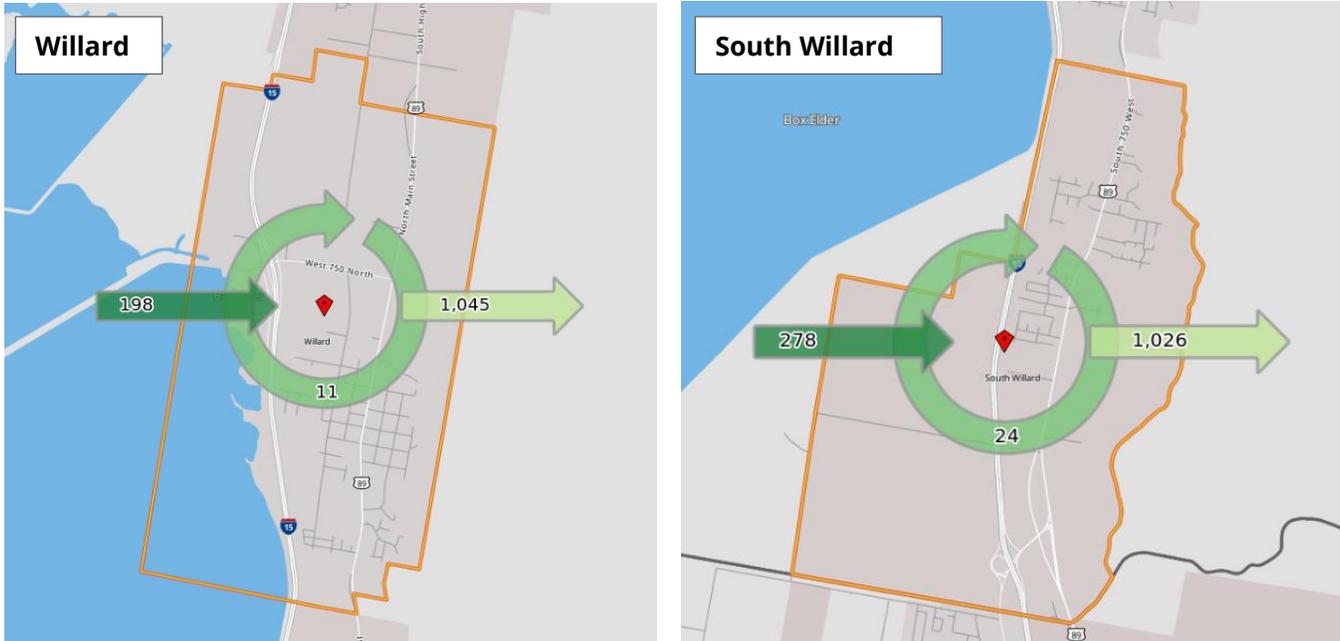
FIGURE 2.4: BOX ELDER COUNTY HISTORIC UNEMPLOYMENT RATE



US Census On the Map data for 2022 illustrates 11 residents both live and are employed within Willard City, while 198 of those who work in Willard live elsewhere and 1,045 residents of the City are employed outside of the City. Similarly, 24 residents both live and are employed within South Willard. 278 of those who work in South Willard live elsewhere and 1,026 residents of the South Willard are employed outside of the area. **Figure 2.5** demonstrates a large proportion of residents leave both Willard City and South Willard for work.



FIGURE 2.5: US CENSUS 2022 ON THE MAP DATA ILLUSTRATION



WFRC TAZ employment projections estimate the total job count in Willard is 486 and in South Willard is 398 (notated as “Box Elder County South” in the table below). The TAZ data illustrates that the City and South Willard will experience an increase in the percentage of total employment. Noticeable shifts in growth in the region from 2025 – 2050 will occur in South Willard, Deweyville, Elwood, Fielding, Mantua, and Plymouth.

TABLE 2.4: BOX ELDER COUNTY EMPLOYMENT PROJECTION

	EMPLOYMENT				GROWTH (2025 – 2050)	
	2025	2030	2040	2050	ACTUAL	% INCREASE
Balance of Box Elder	3,960	4,230	4,570	4,532	572	14.4%
Bear River City	189	192	187	233	45	23.7%
Box Elder County North	339	411	382	409	70	20.7%
Box Elder County South	398	410	587	731	333	83.5%
Brigham City	15,210	15,896	17,027	18,130	2,920	19.2%
Corinne	1,507	1,578	1,707	1,710	203	13.5%
Deweyville	79	80	88	126	47	60.3%
Elwood	323	336	382	480	157	48.6%
Fielding	83	85	126	124	41	49.2%
Garland	456	473	602	452	(4)	-0.9%
Honeyville	595	620	639	805	211	35.4%
Howell	35	36	43	49	14	40.2%
Mantua	199	206	239	301	102	51.3%
Perry	2,565	2,675	2,828	3,028	463	18.0%
Plymouth	121	127	156	176	56	46.0%
Portage	45	47	54	60	15	32.2%
Snowville	216	224	234	251	35	16.2%
Tremonton	6,711	7,004	7,606	8,379	1,668	24.9%
Tremonton Area	538	612	548	689	151	28.1%
Willard	486	510	510	568	82	16.9%
COUNTY TOTAL	34,053	35,751	38,514	41,234	7,180	21.1%

Source: Wasatch Front Regional Council, Traffic Area Zone Projections



RESIDENTIAL BUILDING PERMITS AND NEW COMMERCIAL VALUATION

The Kem C. Gardner Policy Institute tracks building permit activity across the State and maintains the Ivory-Boyer Construction Database. The total number of residential building permits in Willard² has varied from a low of 1 in 2014, to a high of 44 in 2021 as shown in **Figure 2.6**.³ New non-residential value added to the City increased from 2021 to 2022 by 1,500 percent. As of 2025, the median house price in Willard was between \$599,000 and \$614,000 based on housing market report data.⁴

FIGURE 2.6: WILLARD CITY NEW RESIDENTIAL VALUE (\$000) AND UNITS

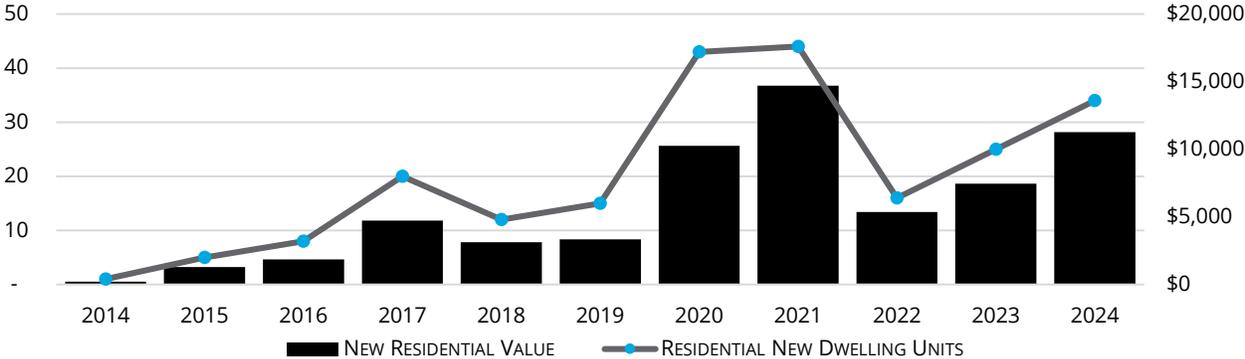
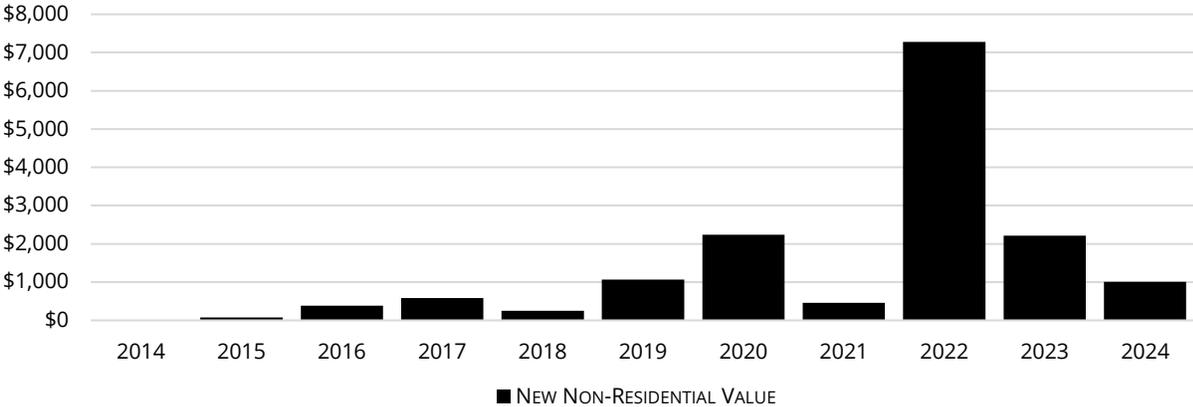


FIGURE 2.7: WILLARD CITY NEW COMMERCIAL VALUE (\$000)



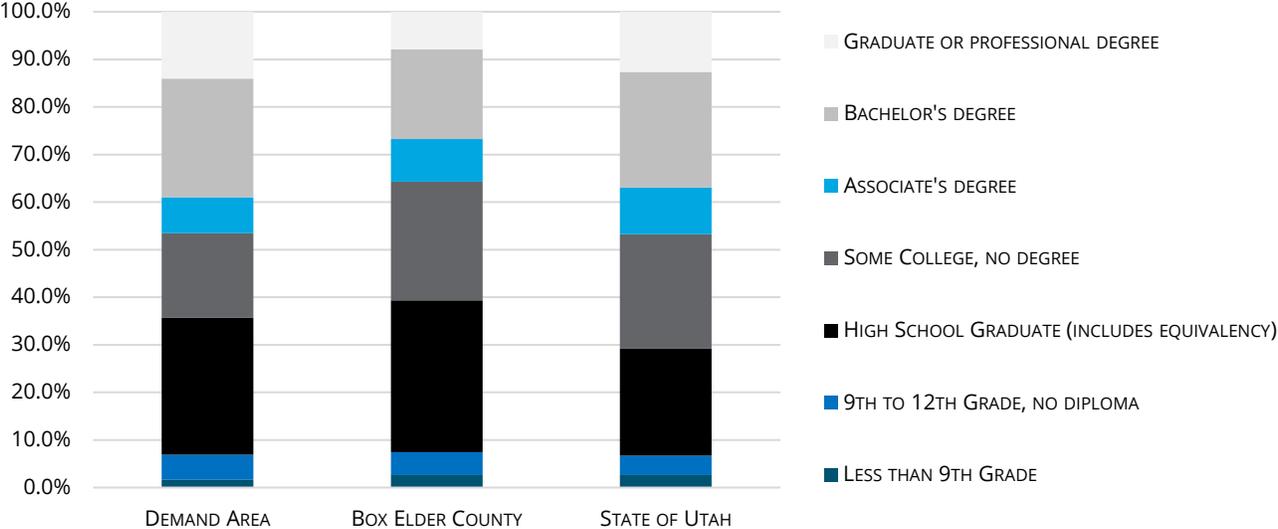
EDUCATION

According to the US Census ACS 2019-2023 five-year estimates, approximately 47 percent of Willard and South Willard’s combined population 25 years and older has an associate degree or higher, compared to Box Elder County with 36 percent and the State of Utah at 47 percent.

² South Willard data not available.
³ Ivory-Boyer Construction Database.
⁴ Rocket Homes. (2025, April). Median List Price. Retrieved from <https://www.rockethomes.com/real-estate-trends/ut/willard>;
 Redfin. (2025, April). Willard, UT Housing Market. Retrieved from <https://www.redfin.com/city/20806/UT/Willard/housing-market>



FIGURE 2.8: WILLARD AREA EDUCATIONAL ATTAINMENT



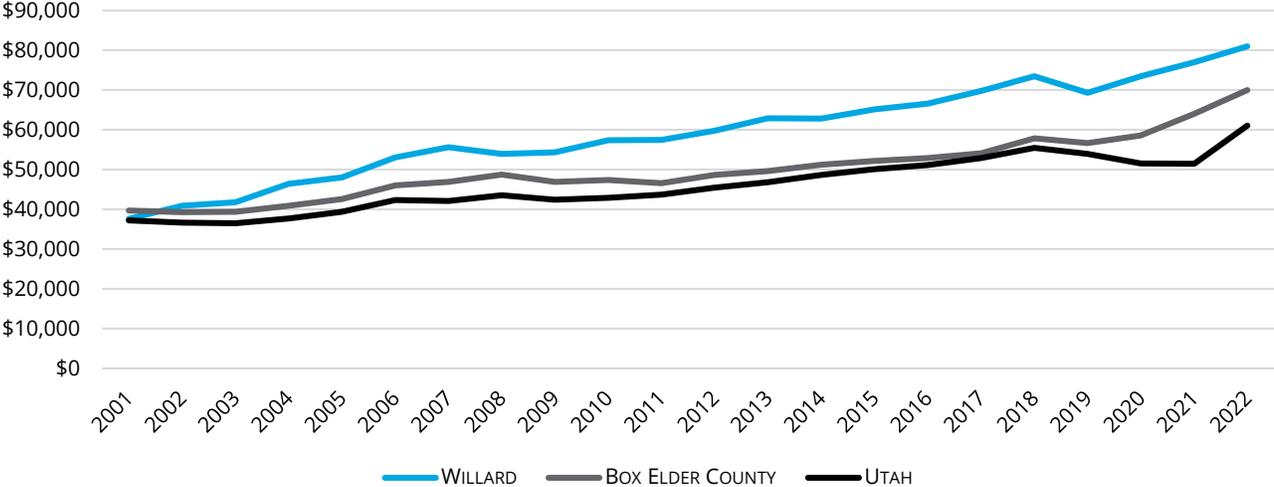
HOUSEHOLDS

In 2025, the total number of households in Willard and South Willard is 908 and 606, respectively, according to WFRC TAZ data. According to the most recent Census (2023), of the total housing units in Willard, 98.8 percent are occupied with 1.2 percent unoccupied. 100 percent housing units are occupied in South Willard. Box Elder County has approximately 94.4 percent housing occupancy rate, compared to the State at 91.8 percent.

INCOME

The Utah median adjusted gross income (MAGI) represents an individual's total gross income minus specific tax deductions. **Figure 2.11** illustrates the historic MAGI and corresponding increase. As of 2020, the Utah State Tax Commission reports Willard's MAGI was \$81,000.⁵ The Willard MAGI was slightly higher than Box Elder County's \$70,000. The State MAGI according was lower than the City and County at \$61,071.

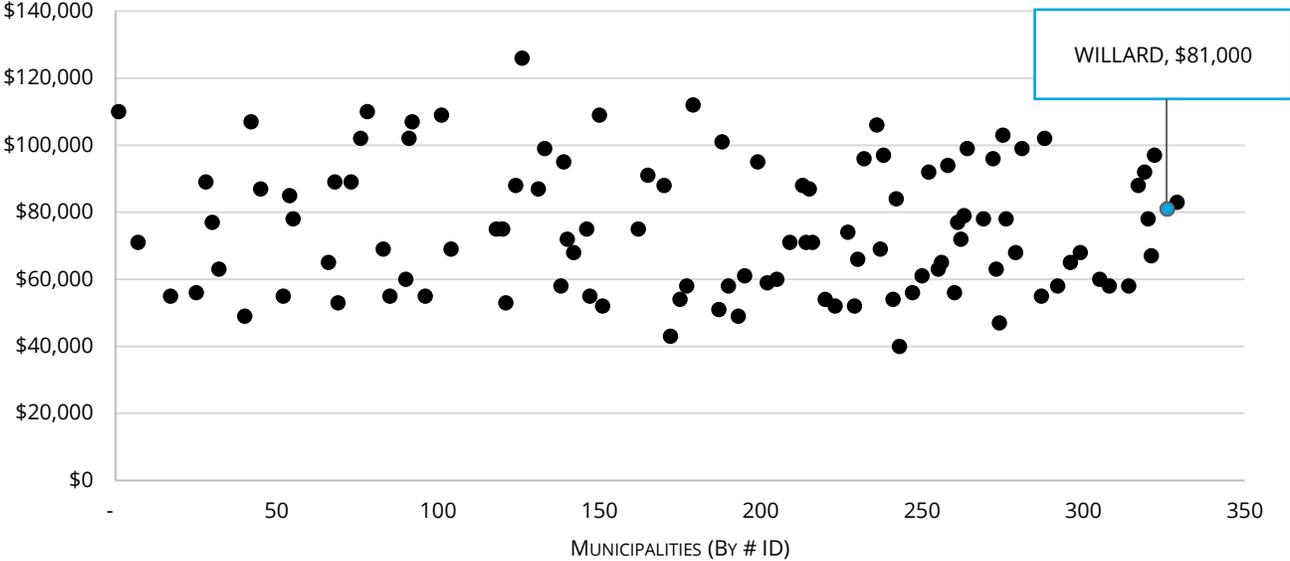
FIGURE 2.11 WILLARD CITY HOUSEHOLD MEDIAN ADJUSTED GROSS INCOME (MAGI)



⁵ South Willard data not available.



FIGURE 2.12 UTAH CITIES 2022 MEDIAN ADJUSTED GROSS INCOME (MAGI)



SECTION 3. ANALYSIS OF TAXABLE SALES

Taxable sales within Willard provide an important metric to assess the general economic health of the City. Data for South Willard was not available. A sales gap (or “leakage”) analysis is used to identify economic development opportunities for a community by evaluating the total purchases made by residents inside and outside the community (hence, the term “leakage” for sales lost outside the community). This type of analysis first identifies sales within the State of Utah for each major North American Industry Classification System (NAICS) code category and then calculates the average sales per capita in each NAICS category. Per capita sales in the City are compared to average per capita sales statewide in order to estimate what portion of resident purchases are being made within City boundaries, and what amount is leaving the City. The resident purchases being made outside of the City represent an opportunity to recapture some of these lost sales.

METHODOLOGY

SALES TAX DATA

The sales tax data provided to LRB contained all sales tax collected by the State of Utah and Willard City for the calendar years (CY) 2021-2023. This data was further broken down by industry. Every business registered in the United States is assigned a NAICS code. For tax purposes, this helps governmental agencies to determine the outlet of sales tax. In the analysis, businesses operating within a certain industry will be referred to as outlets. It is important to highlight that not all data for this analysis can be made public, especially when a specific industry has less than ten outlets, and it is considered a violation of privacy laws to disclose specific data. All data in this analysis has been provided by the Tax Commission of the State of Utah through a public records request by the City.

INCOME DATA

Income data comprises the per capita income for both the City and State. Per capita income is calculated by taking the total income attributable to a certain region and dividing it by the population of that region. This metric reflects the average income earned per person within a region. Comparing these figures gives insight into differences in cost of living, economic prosperity, and overall education. For the year 2023, Willard City had an estimated per capita income of \$32,514 compared to the State average of \$37,023. The difference in estimated per capita income can be caused by factors such as lower cost of living, larger families, and different industry demographics. In order to make this an “apples-to-apples” comparison, LRB adjusted per capita figures between the State and City.

POPULATION DATA

Population data is used to understand per capita spending within a region. The calculation of this figure is derived by taking the total amount of spending within a region and dividing it by the population of that region. As mentioned in the prior paragraph, these numbers are adjusted to ensure comparability between regions. By taking the adjusted per capita spending figures, LRB can analyze the differences between per capita spending by industry when comparing the State and the City.

SALES TAX LEAKAGE ANALYSIS

The tables below provide an overview of leakage and retention by industry. Negative numbers estimate the approximate leakage of taxable sales from Willard City to other communities. When leakage occurs, the capture rate is below 100 percent, indicating the City is not collecting the average sales expected based on a per capita basis relative to the State average. Positive numbers indicate that the City is attracting more than the State average relative to that category, suggesting shoppers from outside the City are attracted to the



area for certain types of purchases or that there is a high concentration of this type of spending. This is reflected in the capture rate as a number above 100 percent.

The analysis divides taxable sales into three major categories: retail sales, industry sales and sales related to services.

RETAIL SALES

RETAIL TRADE

The Retail Trade sector (NAICS 44-45) encompasses establishments primarily engaged in selling merchandise directly to the general public in small quantities. This includes both store retailers, which operate physical locations designed for walk-in customers, and non-store retailers, such as online or catalog-based sellers. Retailers may also provide services like repair and installation alongside merchandise sales, making this the final step in the distribution process of goods. It is important to highlight that retail trade is a large industry and has many sub-industries. Among those that are captured are: Building Material, Garden Equipment & Supplies Dealers, Gasoline Stations, and Non-store Retailers.

TABLE 3.1: RETAIL TRADE SALES LEAKAGE SUMMARY

NAICS CATEGORY	INCOME ADJUSTED CAPTURE RATES		
	CY 2021	CY 2022	CY 2023
Retail Trade	78%	94%	72%
Motor Vehicle & Parts Dealers	3%	2%	3%
New Car Dealers	1%	0%	0%
Used Car Dealers	8%	6%	9%
Other Motor Vehicle Dealers	1%	0%	0%
Automotive Parts, Accessories & Tire Stores	9%	7%	11%
Furniture & Home Furnishings Stores	4%	7%	3%
Furniture Stores	2%	5%	1%
Home Furnishing Stores	8%	10%	7%
Electronics & Appliance Stores	13%	12%	9%
Electronics & Appliance Stores	13%	12%	9%
Build. Material, Garden Equip. & Supplies Dealers	313%	437%	306%
Building Material & Supplies Dealers	325%	453%	320%
Lawn & Garden Equip. & Supplies	3%	5%	5%
Food & Beverage Stores	30%	26%	26%
Grocery Stores	32%	26%	27%
Specialty Food Stores	53%	70%	58%
Beer, Wine & Liquor Stores	0%	0%	0%
Health & Personal Care Stores	16%	16%	15%
Pharmacies & Drug Stores	7%	2%	2%
Cosmetics, Beauty Supplies & Perfume	23%	26%	24%
Optical Goods	8%	7%	7%
Other Health & Personal Care	14%	17%	17%
Gasoline Stations	419%	407%	363%
Gasoline Stations	419%	407%	363%
Clothing & Clothing Accessories Stores	22%	23%	21%
Clothing Stores	22%	22%	19%
Shoe Stores	38%	42%	49%
Jewelry, Luggage & Leather Goods Stores	5%	10%	5%
Sporting Goods, Hobby, Music & Book Stores	17%	17%	15%
Sporting Goods	20%	19%	18%
Hobby, Toys & Games	4%	19%	5%
Sewing, Needlework & Piece Goods	1%	2%	2%
Musical Instruments	23%	10%	5%



NAICS CATEGORY	INCOME ADJUSTED CAPTURE RATES		
	CY 2021	CY 2022	CY 2023
Book Stores & News Dealers	12%	5%	3%
General Merchandise Stores	5%	6%	6%
Department Stores	4%	4%	4%
Other General Merchandise Stores	17%	25%	29%
Miscellaneous Store Retailers	14%	12%	20%
Florists	1%	2%	2%
Office Supplies, Stationary & Gift Stores	12%	9%	9%
Used Merchandise Stores	0%	0%	0%
Other Miscellaneous Stores	15%	13%	22%
Non-store Retailers	118%	112%	119%
Electronic Shopping & Mail Order Houses	122%	117%	123%
Vending Machine Operators	1%	1%	1%
Direct Selling Establishments	45%	38%	40%

The most valuable insights from this industry are that Willard City does exceptionally well in providing building materials/supplies and that gas stations are very highly demanded in the City. During stakeholder discussions, it was noted that only one gas station currently exists within Willard City and the demand for another appears to be exceptionally high. **Section 4** includes an analysis of competitive market sites including gasoline stations.

Potential Opportunities: New Car Dealers, Used Car Dealers, Other Motor Vehicle Dealers, Automotive Parts, Accessories & Tire Stores, Furniture Stores, Home Furnishing Stores, Electronics & Appliance Stores, Lawn & Garden Equip. & Supplies, Food & Beverage Stores, Grocery Stores, Specialty Food Stores, Beer, Wine & Liquor Stores, Pharmacies & Drug Stores, Cosmetics, Beauty Supplies & Perfume, Optical Goods, Other Health & Personal Care, Clothing Stores, Shoe Stores, Jewelry, Luggage & Leather Goods Stores, Sporting Goods, Hobby, Music & Book Stores, Sporting Goods, Toys & Games, Sewing, Needlework & Piece Goods, Musical Instruments, Book Stores & News Dealers, General Merchandise Stores, Department Stores, Other General Merchandise Stores, Miscellaneous Store Retailers, Florists, Office Supplies, Stationary & Gift Stores, Used Merchandise Stores, Other Miscellaneous Stores, Non-store Retailers, Electronic Shopping & Mail Order Houses, Vending Machine Operators, Direct Selling Establishments.

WHOLESALE TRADE

The Wholesale Trade sector (NAICS 42) includes establishments engaged in selling goods in bulk to retailers, industrial, commercial, institutional, or professional users, or other wholesalers. These businesses typically operate from warehouses or offices and may also provide logistics, storage, and delivery services. It is divided into three main types: 1) Durable Goods; 2) Nondurable Goods; and 3) Agents and Brokers. The City performs best in Paper & Paper Products, Apparel, Piece Goods & Notions, and Professional & Commercial Equipment but still leaks a significant portion of sales.

TABLE 3.2: WHOLESALE TRADE SALES LEAKAGE SUMMARY

NAICS CATEGORY	INCOME ADJUSTED CAPTURE RATES		
	CY 2021	CY 2022	CY 2023
Wholesale Trade, Durable Goods	25%	22%	24%
Motor Vehicles & Parts	37%	39%	32%
Furniture & Home Furnishings	12%	13%	19%
Lumber & Other Construction Materials	23%	4%	0%
Professional & Commercial Equipment	37%	43%	43%
Metal & Mineral	4%	0%	0%
Appliances, Electrical & Electronic Goods	6%	6%	4%
Hardware, Plumbing & Heating	2%	4%	0%



NAICS CATEGORY	INCOME ADJUSTED CAPTURE RATES		
	CY 2021	CY 2022	CY 2023
Machinery & Equipment	39%	32%	37%
Miscellaneous Durables	34%	31%	36%
Wholesale Trade, Nondurable Goods	21%	23%	19%
Paper & Paper Products	94%	115%	76%
Drugs & Druggists Sundries	34%	26%	38%
Apparel, Piece Goods & Notions	53%	47%	48%
Grocery & Related Products	6%	6%	7%
Farm Product & Raw Material	0%	0%	67%
Chemical & Allied Products	28%	13%	22%
Petroleum & Petroleum Products	11%	36%	10%
Beer, Wine & Alcoholic Beverages	0%	0%	0%
Miscellaneous Nondurables	12%	14%	10%
Wholesale Trade-Agents & Brokers	24%	30%	22%

Potential Opportunities: Motor Vehicles & Parts, Furniture & Home Furnishings, Lumber & Other Construction Materials, Professional & Commercial Equipment, Metal & Mineral, Appliances, Electrical & Electronic Goods, Hardware, Plumbing & Heating, Machinery & Equipment, and Miscellaneous Durables.

INDUSTRY SALES

AGRICULTURE, FORESTRY, FISHING, AND HUNTING

The Agriculture, Forestry, Fishing, and Hunting sector (NAICS 11) include establishments primarily engaged in growing crops, raising animals, harvesting timber, and capturing fish or wildlife from farms, ranches, or natural habitats. It is divided into five subsectors: Crop Production, Animal Production and Aquaculture, Forestry and Logging, Fishing and Hunting, and Support Activities for Agriculture and Forestry. Excluded are activities like agricultural research or land conservation programs. Willard City performs well within this sector as shown in the data below. Animal Production is the only sub-industry that is captured, but at a rate of 300-500 percent, it significantly contributes to the sector's performance. This is a very strong and healthy sub-industry for the City.

TABLE 3.3: AGRICULTURE, FORESTRY, FISHING, AND HUNTING SALES LEAKAGE SUMMARY

NAICS CATEGORY	INCOME ADJUSTED CAPTURE RATES		
	CY 2021	CY 2022	CY 2023
Agriculture, Forestry, Fishing and Hunting	153%	183%	133%
Crop Production	8%	5%	4%
Animal Production	487%	527%	369%
Forestry and Logging	0%	0%	0%
Fishing, Hunting, and Trapping	0%	79%	19%
Support Activities for Agriculture and Forestry	3%	12%	14%

Potential Opportunities: Crop Production, Forestry and Logging, Fishing, Hunting, and Trapping, and Support Activities for Agriculture and Forestry.

CONSTRUCTION

The Construction sector (NAICS 23) includes establishments primarily engaged in building construction, engineering projects, site preparation, and land subdivision. Work may involve new construction, additions, alterations, maintenance, or repairs. It is divided into three subsectors: Construction of Buildings (NAICS 236), Heavy and Civil Engineering Construction (NAICS 237), and Specialty Trade Contractors (NAICS 238). Within



the City, the prevailing sub-industry is Heavy and Civil Engineering Construction, with a capture rate ranging from 500-1,400 percent.

TABLE 3.4: CONSTRUCTION SALES LEAKAGE SUMMARY

NAICS CATEGORY	INCOME ADJUSTED CAPTURE RATES		
	CY 2021	CY 2022	CY 2023
Construction	282%	148%	121%
Construction of Buildings	5%	5%	1%
Heavy and Civil Engineering Construction	1,388%	915%	551%
Specialty Trade Contractors	68%	7%	24%

Potential Opportunities: Construction of Buildings and Specialty Trade Contractors.

INFORMATION

The Information sector (NAICS 51) includes industries that produce and distribute information and cultural products, provide the means for transmitting or distributing these products and data, and process data. This sector covers both traditional and digital platforms. The majority of this industry is not captured, although CY 2021 data indicate the industry as a whole captured 95 percent of the market. Moreover, Broadcasting and Content Providers and Telecommunications sub-industries are capturing a surplus between 110 and 160 percent. Many insights can be gained from this data, specifically that there could be opportunity for more data/internet usage among businesses.

TABLE 3.5: INFORMATION SALES LEAKAGE SUMMARY

NAICS CATEGORY	INCOME ADJUSTED CAPTURE RATES		
	CY 2021	CY 2022	CY 2023
Information	95%	86%	72%
Publishing Industries-Except Internet	67%	58%	52%
Motion Picture & Sound Recording Industries	6%	3%	3%
Broadcasting and Content Providers	156%	151%	137%
Telecommunications	131%	132%	111%
Data Processing, Hosting & Related Services	60%	44%	33%
Other Information Services	44%	36%	33%

Potential Opportunities: Publishing Industries-Except Internet, Motion Picture & Sound Recording Industries, Data Processing, Hosting & Related Services, and Other Information Services.

MANUFACTURING

The Manufacturing sector (NAICS 31-33) includes establishments engaged in the mechanical, physical, or chemical transformation of raw materials into new products, either finished or semi-finished. Activities such as assembly, blending, and finishing are considered manufacturing. These establishments, often referred to as factories, plants, or mills, may use machinery or hand tools and can own or contract the transformation process. Within Willard City, the industry as a whole is leaking and captures 9-13 percent of the market. Potential causes may be a lack of land or distance from distributors/retailers.



TABLE 3.6: MANUFACTURING SALES LEAKAGE SUMMARY

NAICS CATEGORY	INCOME ADJUSTED CAPTURE RATES		
	CY 2021	CY 2022	CY 2023
Manufacturing	9%	9%	13%
Food Manufacturing	26%	13%	26%
Beverage and Tobacco Product Manufacturing	1%	0%	1%
Textile Mills	40%	29%	25%
Textile Product Mills	3%	23%	8%
Apparel Manufacturing	14%	17%	14%
Leather & Allied Product Manufacturing	34%	34%	44%
Wood Product Manufacturing	1%	2%	6%
Paper Manufacturing	11%	15%	8%
Printing & Related Support Activities	10%	15%	18%
Petroleum & Coal Products Manufacturing	5%	0%	0%
Chemical Manufacturing	9%	8%	5%
Plastics & Rubber Products Manufacturing	4%	7%	4%
Nonmetallic Mineral Product Manufacturing	1%	1%	1%
Primary Metal Manufacturing	0%	1%	73%
Fabricated Metal Product Manufacturing	7%	22%	14%
Machinery Manufacturing	16%	3%	5%
Computer & Electronic Product Manufacturing	10%	14%	13%
Elec. Equip., Appliance & Component Manufacturing	0%	3%	3%
Transportation Equipment Manufacturing	2%	8%	11%
Furniture & Related Prod. Manufacturing	5%	2%	36%
Miscellaneous Manufacturing	28%	15%	31%

Potential Opportunities: Food Manufacturing, Beverage and Tobacco Product Manufacturing, Textile Mills, Textile Product Mills, Apparel Manufacturing, Leather & Allied Product Manufacturing, Wood Product Manufacturing, Paper Manufacturing, Printing & Related Support Activities, Petroleum & Coal Products Manufacturing, Chemical Manufacturing, Plastics & Rubber Products Manufacturing, Nonmetallic Mineral Product Manufacturing, Primary Metal Manufacturing, Fabricated Metal Product Manufacturing, Machinery Manufacturing, Computer & Electronic Product Manufacturing, Electrical Equipment, Appliance & Component Manufacturing, Transportation Equipment Manufacturing, Furniture & Related Product Manufacturing, Miscellaneous Manufacturing.

MINING, QUARRYING, AND OIL AND GAS EXTRACTION

The Mining, Quarrying, and Oil and Gas Extraction sector (NAICS 21) includes establishments primarily engaged in extracting naturally occurring minerals, such as coal, ores, crude petroleum, and natural gas. Activities include mining, quarrying, well operations, and mineral processing at the site. It is divided into three subsectors: Oil and Gas Extraction (NAICS 211), Mining (except Oil and Gas) (NAICS 212), and Support Activities for Mining (NAICS 213). Mining (except Oil and Gas) is the most dominant sub-industry due to the City's positioning against the Wasatch Mountains.

TABLE 3.7: MINING, QUARRYING, AND OIL AND GAS EXTRACTION SALES LEAKAGE SUMMARY

NAICS CATEGORY	INCOME ADJUSTED CAPTURE RATES		
	CY 2021	CY 2022	CY 2023
Mining, Quarrying, and Oil and Gas Extraction	301%	205%	135%
Oil and Gas Extraction	0%	0%	0%
Mining (Except Oil and Gas)	785%	780%	453%
Support Activities for Mining	82%	0%	0%



Potential Opportunities: Oil and Gas Extraction and Support Activities for Mining.

TRANSPORTATION AND WAREHOUSING

The Transportation and Warehousing sector (NAICS 48-49) encompass industries involved in transporting passengers and goods, warehousing and storage, scenic and sightseeing transportation, and related support activities. The sector also includes various modes of transportation such as air, rail, water, road, and pipelines. Subcategories range from truck transportation to postal services and couriers. Establishments in this sector often operate extensive networks of facilities and equipment to facilitate the movement and storage of goods or passengers. The City is experiencing leakage in all subcategories, indicating the City is not collecting the average sales expected based on a per capita basis relative to the State average.

TABLE 3.8: TRANSPORTATION AND WAREHOUSING SALES LEAKAGE SUMMARY

NAICS CATEGORY	INCOME ADJUSTED CAPTURE RATES		
	CY 2021	CY 2022	CY 2023
Transportation & Warehousing	5%	5%	7%
Air Transportation	0%	0%	0%
Rail Transportation	0%	0%	0%
Truck Transportation	0%	0%	0%
Transit & Ground Passenger Transportation	0%	0%	0%
Pipeline Transportation	0%	0%	0%
Scenic & Sightseeing Transportation	0%	0%	0%
Support Activities for Transportation	5%	20%	36%
Postal Service	0%	0%	0%
Couriers & Messengers	4%	7%	5%
Warehousing & Storage	30%	19%	10%

Potential Opportunities: Air Transportation, Rail Transportation, Water Transportation, Truck Transportation, Transit and Ground Passenger Transportation, Pipeline Transportation, Scenic and Sightseeing Transportation, Support Activities for Transportation, Postal Services, Couriers and Messengers, Warehousing and Storage.

UTILITIES

The Utilities sector (NAICS 22) comprises establishments engaged in providing essential utility services, including electric power, natural gas, steam supply, water supply, and sewage removal. These businesses operate infrastructure for the generation, transmission, and distribution of these services to residential, commercial, and industrial customers. Utilities are critical for supporting daily life and economic activities. Within Willard, this industry thrives in terms of capturing sales tax. The data suggests a possibility for more energy efficiency within the community.

TABLE 3.9: UTILITIES SALES LEAKAGE SUMMARY

NAICS CATEGORY	INCOME ADJUSTED CAPTURE RATES		
	CY 2021	CY 2022	CY 2023
Utilities	118%	175%	121%
Electric Power Generation, Transmission & Dist.	118%	213%	131%
Natural Gas Distribution	119%	112%	109%
Water, Sewage & Other Systems	0%	0%	0%

Potential Opportunities: Water, Sewage & Other Systems.



SERVICE SALES

ACCOMMODATION AND FOOD SERVICES

The Accommodation and Food Services sector (NAICS 72) include establishments that provide lodging and food or drink services to customers. Accommodation services include hotels, motels, and other lodging facilities, while food services encompass restaurants, bars, caterers, and mobile food vendors. These businesses focus on hospitality and customer service for leisure or business purposes. Willard City captures the RV Parks & Recreational Camps subcategory.

TABLE 3.10: ACCOMMODATION AND FOOD SERVICES SALES LEAKAGE SUMMARY

NAICS CATEGORY	INCOME ADJUSTED CAPTURE RATES		
	CY 2021	CY 2022	CY 2023
Accommodation and Food Services	1%	1%	1%
Accommodation	4%	3%	3%
Traveler Accommodation	0%	1%	0%
RV Parks & Recreational Camps	105%	87%	107%
Rooming & Boarding Houses	0%	0%	0%
Food Services & Drinking Places	0%	0%	0%
Restaurants & Other Eating Places	0%	0%	0%
Special Food Services	2%	1%	2%
Drinking Places-Alcoholic Beverages	0%	0%	0%

During stakeholder discussions, it was noted that there may be the demand for overnight lodging as a result of Willard Bay's visitation. **Section 4** includes an analysis of competitive market sites including gasoline stations.

Potential Opportunities: Traveler Accommodation, Rooming & Boarding Houses, Restaurants & Other Eating Places, Special Food Services, and Drinking Places-Alcoholic Beverages.

ADMINISTRATIVE AND SUPPORT AND WASTE MANAGEMENT AND REMEDIATION SERVICES

The Administrative and Support and Waste Management and Remediation Services sector (NAICS 56) includes establishments providing routine support services for the day-to-day operations of other organizations, such as office administration, personnel hiring, security, cleaning, and document preparation. It also encompasses waste management activities like waste collection, treatment, disposal, recycling, and environmental remediation services. The data shows that Willard City has begun to make efforts towards capturing this industry; however, it is sign of efficiency to have a low capture for Waste Management & Remediation Services.

TABLE 3.11: ADMINISTRATIVE AND SUPPORT AND WASTE MANAGEMENT AND REMEDIATION SERVICES SALES LEAKAGE SUMMARY

NAICS CATEGORY	INCOME ADJUSTED CAPTURE RATES		
	CY 2021	CY 2022	CY 2023
Admin. & Support & Waste Manag. & Remed. Services	15%	20%	24%
Administrative & Support Services	13%	18%	22%
Waste Management & Remediation Services	45%	49%	44%

Potential Opportunities: Administrative & Support Service, and Waste Management & Remediation Services.

ARTS, ENTERTAINMENT, AND RECREATION

The Arts, Entertainment, and Recreation sector (NAICS 71) includes establishments that provide cultural, artistic, entertainment, and recreational activities. This sector encompasses performing arts, spectator sports, museums, historical sites, amusement parks, fitness centers, and other recreational facilities. These activities



are designed to entertain, educate, or provide leisure experiences to individuals and groups. The capture rate in this industry is substantially high due to Willard Bay State Park, further illustrating Willard’s strength and how it can be used for economic development.

TABLE 3.12: ARTS, ENTERTAINMENT, AND RECREATION SALES LEAKAGE SUMMARY

NAICS CATEGORY	INCOME ADJUSTED CAPTURE RATES		
	CY 2021	CY 2022	CY 2023
Arts, Entertainment, and Recreation	285%	130%	228%
Performing Arts, Spectator Sports & Related Industries	89%	29%	20%
Museums, Historical Sites & Similar Institutions	4,251%	2,046%	3,585%
Amusement, Gambling & Recreation Industries	0%	0%	0%

Potential Opportunities: Performing Arts, Spectator Sports & Related Industries and Amusement, Gambling & Recreation Industries.

EDUCATIONAL SERVICES

The Educational Services sector (NAICS 61) includes establishments that provide instruction and training in a wide variety of subjects. This sector encompasses schools, colleges, universities, and training centers offering education through formal programs, as well as specialized services like tutoring, language instruction, and test preparation. Education may be delivered in person or online. This industry is expected to grow as population increases as higher demand derives from increased student base.

TABLE 3.13: EDUCATION SALES LEAKAGE SUMMARY

NAICS CATEGORY	INCOME ADJUSTED CAPTURE RATES		
	CY 2021	CY 2022	CY 2023
Educational Services	8%	12%	30%

FINANCE AND INSURANCE

The Finance and Insurance sector (NAICS 52) includes establishments engaged in financial transactions such as raising funds, lending, and investing, as well as facilitating these activities. It also covers risk pooling through insurance underwriting and providing specialized services such as financial advisory and employee benefit programs. Key subsectors include Monetary Authorities, Credit Intermediation, Securities and Investments, Insurance Carriers, and Funds and Trusts. The data below shows a significant leakage occurring in the industry. The anomaly in this data is CY2021—which accounts for Federal Reserve activity during COVID-19 and can be ignored for purposes of this analysis.

TABLE 3.14: FINANCE AND INSURANCE SALES LEAKAGE SUMMARY

NAICS CATEGORY	INCOME ADJUSTED CAPTURE RATES		
	CY 2021	CY 2022	CY 2023
Finance and Insurance	74%	64%	44%
Monetary Authorities-Central Bank	552% ¹	0%	3%
Credit Intermediation & Related Activities	77%	74%	47%
Securities, Commodity Contracts & Other Financial	5%	0%	4%
Insurance Carriers & Related Activities	73%	71%	67%
Funds, Trusts & Other Financial Vehicles	0%	0%	0%

Note 1: Represents an outlier in this data is CY2021 can be ignored for purposes of this analysis.

Potential Opportunities: Monetary Authorities-Central Bank, Credit Intermediation & Related Activities, Securities, Commodity Contracts & Other Financial, Insurance Carriers & Related Activities, and Funds, Trusts & Other Financial Vehicles.



HEALTH CARE AND SOCIAL ASSISTANCE

The Health Care and Social Assistance sector (NAICS 62) includes establishments providing medical care, social support, and assistance to individuals. It encompasses a range of services such as ambulatory health care, hospitals, nursing and residential care facilities, and social assistance programs. These services are delivered by trained professionals to improve health and well-being.

TABLE 3.15: HEALTH CARE AND SOCIAL ASSISTANCE SALES LEAKAGE SUMMARY

NAICS CATEGORY	INCOME ADJUSTED CAPTURE RATES		
	CY 2021	CY 2022	CY 2023
Health Care and Social Assistance	1%	3%	2%
Ambulatory Health Care Services	1%	1%	1%
Hospitals	0%	0%	0%
Nursing & Residential Care Facilities	0%	0%	0%
Social Assistance	27%	97%	48%

Potential Opportunities: Ambulatory Health Care Services, Hospitals, Nursing & Residential Care Facilities, and Social Assistance.

MANAGEMENT OF COMPANIES AND ENTERPRISES

The Management of Companies and Enterprises sector (NAICS 55) includes establishments primarily engaged in holding securities to control or influence management decisions or overseeing and managing other company establishments. These entities focus on strategic planning, organizational decision-making, and administrative functions to achieve economies of scale within the enterprise. This sector is heavily leaked in Willard.

TABLE 3.16: MANAGEMENT OF COMPANIES AND ENTERPRISES SALES LEAKAGE SUMMARY

NAICS CATEGORY	INCOME ADJUSTED CAPTURE RATES		
	CY 2021	CY 2022	CY 2023
Management of Companies and Enterprises	55%	16%	9%

PROFESSIONAL, SCIENTIFIC, AND TECHNICAL SERVICES

The Professional, Scientific, and Technical Services sector (NAICS 54) includes establishments that provide specialized services requiring expertise in fields such as law, accounting, engineering, architecture, consulting, research, advertising, and design. These businesses primarily offer knowledge-based services to clients in various industries. Activities in this sector rely heavily on skilled professionals and technical expertise. Almost all sub-industries are leaking with exception of Architectural & Engineering Services. This sub-industry captures around 112-177 percent.

TABLE 3.17: PROFESSIONAL, SCIENTIFIC, AND TECHNICAL SALES LEAKAGE SUMMARY

NAICS CATEGORY	INCOME ADJUSTED CAPTURE RATES		
	CY 2021	CY 2022	CY 2023
Professional, Scientific, and Technical Services	44%	44%	50%
Legal Services	0%	0%	0%
Accounting, Tax Preparation, Bookkeeping & Payroll	8%	9%	18%
Architectural & Engineering Services	140%	112%	177%
Specialized Design Services	11%	10%	11%
Computer Systems Design & Related Services	18%	26%	17%



NAICS CATEGORY	INCOME ADJUSTED CAPTURE RATES		
	CY 2021	CY 2022	CY 2023
Management, Scientific & Tech. Services	9%	7%	7%
Scientific Research & Development	2%	0%	0%
Advertising & Public Relations	5%	4%	4%
Other Professional, Scientific & Enterprises	68%	77%	68%

Potential Opportunities: Legal Services, Accounting, Tax Preparation, Bookkeeping & Payroll, Architectural & Engineering Services, Specialized Design Services, Computer Systems Design & Related Services, Management, Scientific & Tech. Services, Scientific Research & Development, Advertising & Public Relations, Other Professional, Scientific & Enterprises.

REAL ESTATE AND RENTAL AND LEASING

The Real Estate and Rental and Leasing sector (NAICS 53) includes establishments includes real estate properties, equipment, and nonfinancial intangible assets (excluding copyrighted works). Key activities include property management, real estate sales, appraisals, and leasing services for items like vehicles and machinery. Major subsectors are Real Estate (NAICS 531), Rental and Leasing Services (NAICS 532), and Lessors of Nonfinancial Intangible Assets (NAICS 533).

TABLE 3.18: REAL ESTATE AND RENTAL AND LEASING SALES LEAKAGE SUMMARY

NAICS CATEGORY	INCOME ADJUSTED CAPTURE RATES		
	CY 2021	CY 2022	CY 2023
Real Estate and Rental and Leasing	72%	56%	70%
Real Estate	13%	0%	0%
Rental & Leasing Services	75%	59%	74%
Lessors of Nonfinancial Intangible Assets	0%	0%	0%

The analysis shows that there is leakage within this industry. This is expected to increase with population growth. The under capture or leakage gives insight into potential real estate and renting opportunities within the City.

Potential Opportunities: Real Estate, Rental & Leasing, and Lessors of Nonfinancial Intangible Assets.

OTHER SERVICES (EXCEPT PUBLIC ADMINISTRATION)

The Other Services (except Public Administration) sector (NAICS 81) includes establishments providing services not classified elsewhere, such as equipment repair, personal care, laundry, pet care, death care, and photofinishing. It also encompasses religious organizations, grantmaking, advocacy, and private households employing workers. These services cater to diverse personal and organizational needs. As a broad industry/sector, it offers plenty of opportunities to the City.

TABLE 3.19: OTHER SERVICES (EXCEPT PUBLIC ADMINISTRATION) SALES LEAKAGE SUMMARY

NAICS CATEGORY	INCOME ADJUSTED CAPTURE RATES		
	CY 2021	CY 2022	CY 2023
Other Services (except Public Administration)	16%	9%	6%
Automotive Repair & Maintenance	13%	6%	5%
Electronic & Precision Equip. Repair & Maintenance	8%	2%	2%
Commercial & Industrial Equip. Repair & Maintenance	67%	35%	10%



NAICS CATEGORY	INCOME ADJUSTED CAPTURE RATES		
	CY 2021	CY 2022	CY 2023
Personal & Household Goods Repair & Maintenance	14%	15%	18%
Personal & Laundry Services	16%	13%	7%
Religious, Grantmaking, Civic, Professional & Similar	1%	1%	1%
Private Households	0%	0%	0%

Potential Opportunities: Automotive Repair & Maintenance, Electronic & Precision Equip. Repair & Maintenance, Commercial & Industrial Equip. Repair & Maintenance, Personal & Household Goods Repair & Maintenance, Personal & Laundry Services, Religious, Grantmaking, Civic, Professional & Similar, and Private Households.

OVERVIEW

The table below provides a general overview of leakage and retention by major category. Negative numbers estimate the approximate leakage of taxable sales from Willard City to other communities. When leakage occurs, the capture rate is below 100 percent, indicating the City is not collecting the average sales expected based on a per capita basis relative to the State average. Positive numbers indicate that the City is attracting more than the State average relative to that category, suggesting shoppers from outside the City are attracted to the area for certain types of purchases or that there is a high concentration of this type of spending. This is reflected in the capture rate as a number above 100 percent.

TABLE 3.20: SUMMARY OF LEAKAGE AND RETENTION BY MAJOR CATEGORY (CY2023)

	WILLARD DIRECT TAXABLE SALES	PER CAPITA SPENDING	UTAH INCOME ADJUSTED PER CAPITA SPENDING	CAPTURE RATE	PER CAPITA SALE LEAKAGE	TOTAL LEAKAGE
Agriculture, Forestry, Fishing and Hunting	\$36,605	\$15	\$12	133%	\$4	\$9,006
Mining, Quarrying, and Oil and Gas Extraction	\$547,931	\$230	\$170	135%	\$60	\$142,803
Construction	\$1,364,651	\$574	\$475	121%	\$99	\$234,561
Manufacturing	\$383,090	\$161	\$1,212	13%	(\$1,051)	(\$2,501,197)
Wholesale Trade	\$1,336,650	\$562	\$2,390	24%	(\$1,828)	(\$4,348,098)
Retail Trade	\$23,624,164	\$9,930	\$13,742	72%	(\$3,811)	(\$9,067,410)
Transportation and Warehousing	\$15,189	\$6	\$95	7%	(\$89)	(\$210,558)
Utilities	\$2,643,801	\$1,111	\$915	121%	\$196	\$466,704
Information	\$1,620,648	\$681	\$950	72%	(\$269)	(\$638,774)
Finance and Insurance	\$106,601	\$45	\$102	44%	(\$57)	(\$136,234)
Real Estate and Rental and Leasing	\$1,093,573	\$460	\$654	70%	(\$194)	(\$462,063)
Professional, Scientific, and Technical Services	\$675,100	\$284	\$563	50%	(\$279)	(\$663,508)
Management of Companies and Enterprises	\$1,901	\$1	\$9	9%	(\$8)	(\$20,000)
Admin. and Support and Waste Management	\$65,978	\$28	\$116	24%	(\$88)	(\$210,069)
Educational Services	\$43,011	\$18	\$60	30%	(\$41)	(\$98,598)
Health Care and Social Assistance	\$2,520	\$1	\$50	2%	(\$49)	(\$115,953)
Arts, Entertainment, and Recreation	\$1,995,082	\$839	\$367	228%	\$471	\$1,121,121
Accommodation and Food Services	\$67,934	\$29	\$2,883	1%	(\$2,854)	(\$6,790,612)
Other Services (except Public Administration)	\$92,194	\$39	\$643	6%	(\$604)	(\$1,436,895)
Public Administration	\$0	\$0	\$93	0%	(\$93)	(\$221,733)
Subtotal	\$35,716,623	\$15,013	\$25,500	59%	(\$10,487)	(\$24,947,507)
TOTAL (Including Motor Vehicle/Unknown)	\$37,899,297	\$15,931	\$26,379	60%	(\$10,448)	(\$24,885,799)



The per capita spending in Willard is approximately \$15,931, compared to the State average of \$26,379, and has a capture rate of 60 percent. The total taxable sales leaking to other communities is estimated at \$24.9M. The analysis demonstrates the City is capturing Agriculture, Forestry, Fishing and Hunting, Construction, Mining, Quarrying and Oil and Gas Extraction, Utilities, and Arts, Entertainment and Recreation industries. Most notably, Willard Bay State Park emerges as a significant driver of economic activity and tourism. However, the study also identifies substantial leakage in industries including Manufacturing, Retail Trade, Health Care and Social Assistance, and Transportation, presenting opportunities for strategic development and investment. Addressing these gaps through targeted initiatives—such as expanding retail options, supporting local manufacturing, and enhancing health care services—could bolster the city's economy and reduce reliance on external communities. The findings offer a roadmap for leveraging existing strengths while addressing areas of leakage to foster sustainable growth in Willard City.



SECTION 4. MARKET ANALYSIS

EXISTING CONDITIONS

It is likely that commercial growth will be limited to currently planned and potential commercial zones. It is expected that the City will rezone for industrial use north of 1075 North along I-15. The following section assesses the City's feasibility to develop neighborhood scale retail by addressing the existing market conditions within the City including property taxation, land uses and zoning, historic average annual daily trips and visitation to Willard Bay, an illustration of competitive market sites, supportable commercial zoning and potential barriers to future economic growth.

PROPERTY TAX

Utah's municipal tax rate setting process is designed to achieve budget neutrality. An entity's prior year budgeted revenue serves as the baseline for current year certified tax rate calculations. According to the Utah State Tax Commission:

The county assessor and State Tax Commission provide valuation information to the county auditor, including changes in value resulting from reappraisal, new growth, factoring and legislative adjustments. The State Tax Commission and the county auditor calculate certified tax rates and the county auditor provides taxing entities with valuation and certified tax rate information. The certified tax rate provides a taxing entity with the same amount of property tax revenue it received in the previous tax year plus any revenue generated by additional growth in its taxable value. When this information is received, taxing entities compute and adopt proposed tax rates. If an entity is proposing a property tax revenue increase, it may only adopt a tentative or proposed tax rate. The exact requirements to increase property tax revenue vary depending on whether the entity is a calendar year or a fiscal year entity. These procedures are discussed in more detail in Standard 10.9 "Truth in Taxation".⁶

In order to adopt a tax rate that exceeds the Certified Tax Rate, an entity must go through what is known as the "Truth-in-Taxation" process. Truth-in-Taxation statutes require that entities proposing a tax increase must advertise the increase and hold a public hearing. The Certified Tax Rate or the proposed rate, if adopted, is applied to all taxable value within the boundaries of the taxing entity.⁷

TABLE 4.1: TAX RATE COMPARISONS AMONG BOX ELDER COUNTY COMMUNITIES

	2020	2021	2022	2023	2024	2025 TAX RATE	RANK	2024 POPULATION	RANK
Bear River	0.000762	0.000682	0.000549	0.000451	0.000490	0.000479	13	901	9
Brigham City	0.001802	0.001802	0.001802	0.001567	0.001706	0.001611	5	20,319	1
Corinne	0.002010	0.001806	0.001601	0.001499	0.001431	0.001396	6	879	10
Deweyville	0.000563	0.000525	0.000460	0.000433	0.000441	0.000708	8	455	13
Elwood	0.000977	0.000917	0.000760	0.000587	0.000584	0.000675	10	1,333	8
Fielding	0.000619	0.000602	0.000370	0.000324	0.000324	0.000340	15	631	11
Garland	0.003344	0.003161	0.003000	0.002754	0.002539	0.002720	2	2,772	4
Honeyville	0.000624	0.000591	0.000491	0.000449	0.000444	0.000447	14	1,783	6
Howell	0.000624	0.000661	0.000570	0.000629	0.000550	0.000577	12	237	15
Mantua	0.003145	0.002814	0.002279	0.001716	0.001908	0.001876	3	1,354	7
Perry	0.002175	0.002175	0.002045	0.001857	0.001906	0.001801	4	6,111	3

⁶ Source: Utah State Tax Commission, Tax Rate Certification Standards of Practice (p. 4).

⁷ For a historic overview of Utah's property tax system see: <https://propertytax.utah.gov/general/>



	2020	2021	2022	2023	2024	2025 TAX RATE	RANK	2024 POPULATION	RANK
Plymouth	0.000160	0.000161	0.000104	0.000104	0.000103	0.000112	16	492	12
Portage	0.001045	0.001035	0.000647	0.000635	0.000645	0.000650	11	292	14
Snowville	0.001359	0.001370	0.000850	0.000762	0.000706	0.000706	9	164	16
Tremonton	0.002413	0.002548	0.002191	0.003038	0.002762	0.002797	1	12,677	2
Willard	0.001160	0.001022	0.001022	0.000917	0.000967	0.000958	7	2,355	5

Source: U.S. Census Bureau, City and Town Population Totals: 2020-2024
Utah Certified Tax Rates

The total Willard tax rate for Tax Area 132 is made up of levies by Box Elder County, Multicounty and County Assessing, Box Elder School District, Willard City, Box Elder Mosquito Abatement District, Willard Precinct Cemetery Maintenance District, Box Elder County and Willard City Flood Control and Drainage, Bear River Water Conservancy District, and the Box Elder County Library.⁸ As shown in **Figure 4.1**, the Box Elder School District accounts for approximately 65 percent of the tax rate in 2025. The Willard City municipal tax rate as a percent of the total tax rate fluctuated historically between 10 percent and 11 percent as shown in **Figure 4.2**.

FIGURE 4.1: HISTORIC TAX RATE FOR WILLARD (TAX AREA 132)

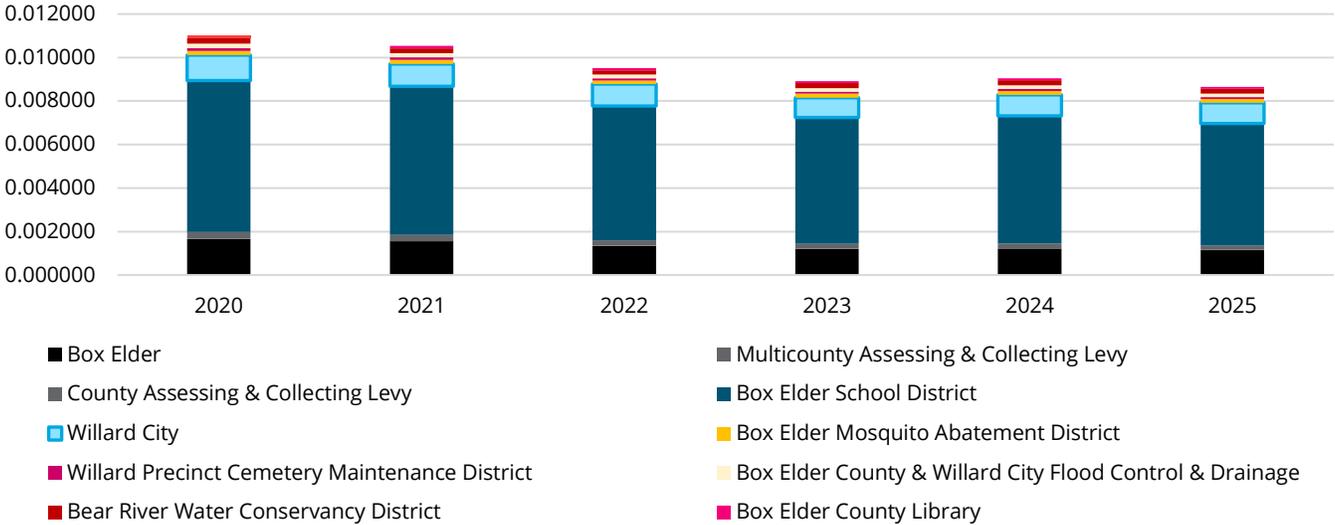
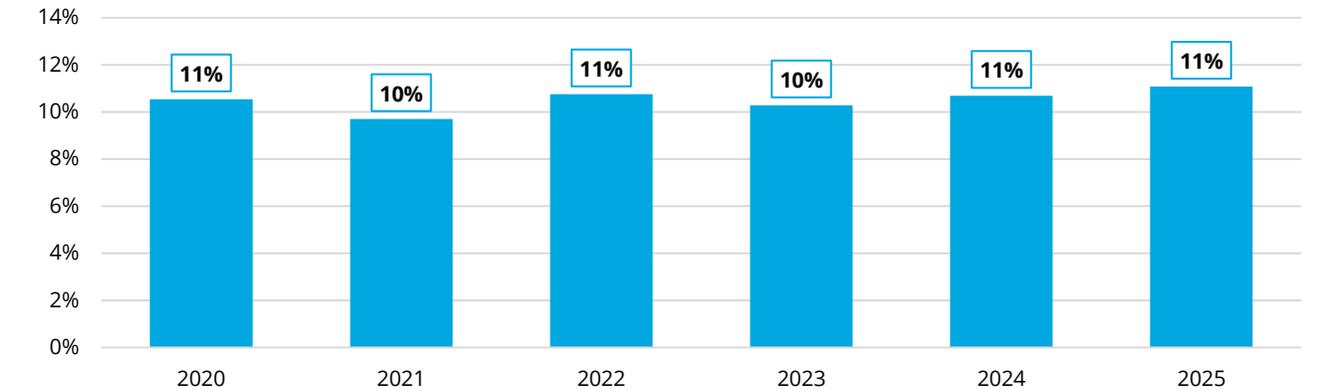


FIGURE 4.2: WILLARD CITY TAX RATE AS A PERCENT OF TOTAL TAX AREA 132



⁸ Tax Area 134 encompasses part of west Willard and includes a levy from Weber Basin Water Conservancy District.



LAND USE AND ZONING

The distribution of land uses in Willard illustrates a concentration of residential development, with nearly 60 percent of the market value and 61 percent of the taxable value attributed to primary residential property types, as shown in **Table 4.2**. **Figure 4.3** illustrates the distribution of land use types within Willard.

TABLE 4.2: DISTRIBUTION OF LAND USE TYPES WITHIN WILLARD

PROPERTY TYPE	PARCELS	ACRES	BUILDING SF	TAX ABLE VALUE	% OF TAXABLE VALUE	MARKET VALUE	% OF MARKET VALUE
Agricultural Buildings	125	621.26	224,885	\$29,984,810	10.5%	\$93,907,430	11.4%
Agricultural Land	175	506.67	280,570	\$40,044,425	14.1%	\$100,482,871	12.2%
Commercial Buildings	25	66.88	30,969	\$20,712,604	7.3%	\$43,555,985	5.3%
Commercial Land	3	23.80	3,783	\$301,426	0.1%	\$1,430,613	0.2%
Exempt Improvements	11	16.90	38,339	\$0	0.0%	\$1,818,025	0.2%
Exempt Land	91	1,171.77	141,063	\$0	0.0%	\$9,278,050	1.1%
FAA	136	1,326.85	140,769	\$4,130,321	1.5%	\$51,999,230	6.3%
Residential Building Non Primary	18	11.14	17,755	\$5,942,051	2.1%	\$14,926,077	1.8%
Residential Building Primary	624	288.78	839,434	\$173,267,270	60.9%	\$488,298,650	59.1%
Residential Land Non Primary	70	18.69	90,802	\$9,936,280	3.5%	\$19,872,560	2.4%
State Assessed Land	6	49.15	4,010	\$3	0.0%	\$6	0.0%
Unknown	18	32.68	18,243	\$0	0.0%	\$0	0.0%
TOTAL WILLARD	1,302	4,134.58	1,830,622	\$284,319,190	100%	\$825,569,497	100%

Source: Box Elder County Assessor's and Auditor's Offices

Similarly, the distribution of land uses in South Willard illustrates a concentration of residential development, with nearly 65 percent of the market value and 71 percent of the taxable value attributed to primary residential property types.

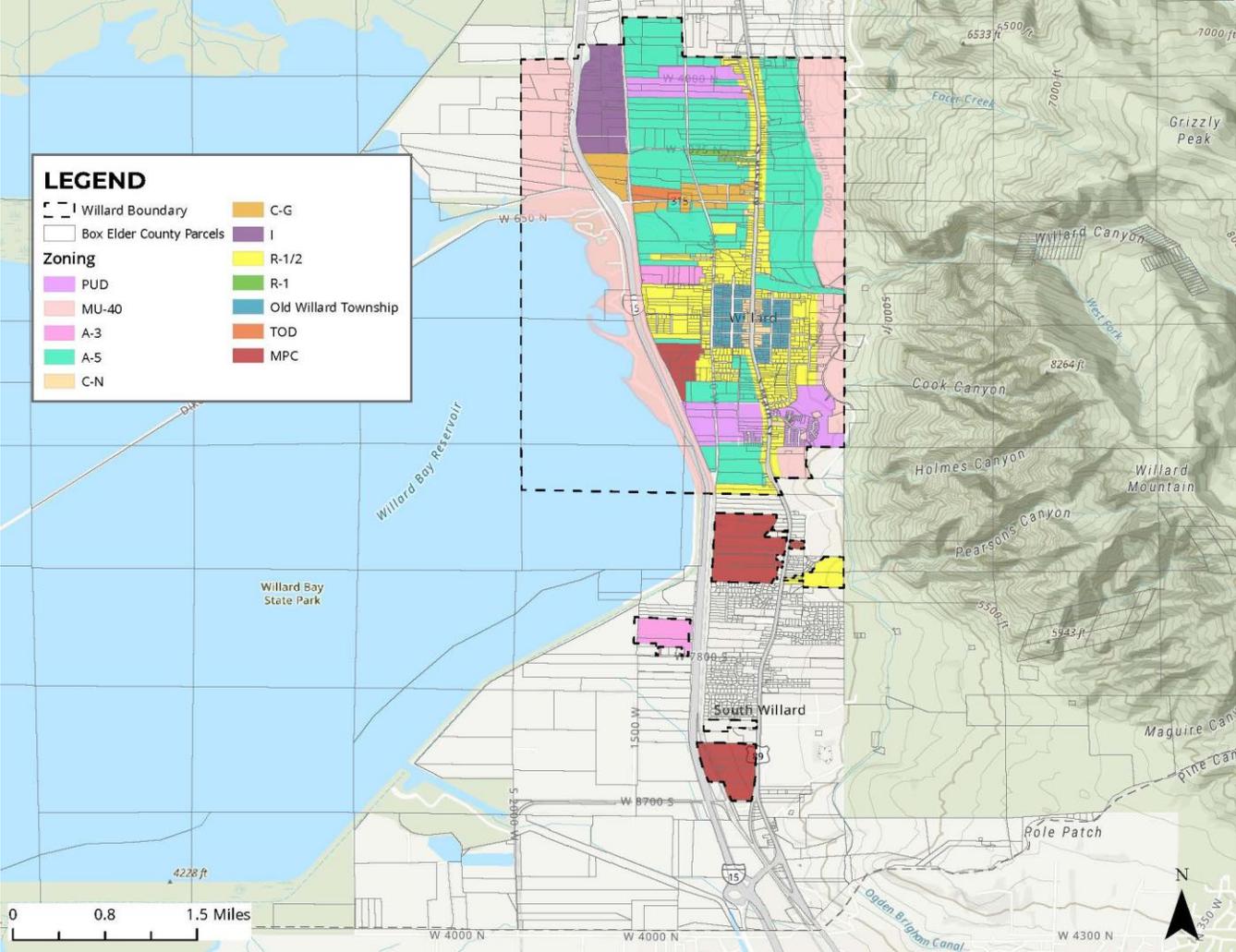
TABLE 4.3: DISTRIBUTION OF LAND USE TYPES WITHIN SOUTH WILLARD

PROPERTY TYPE	PARCELS	ACRES	BUILDING SF	TAX ABLE VALUE	% OF TAXABLE VALUE	MARKET VALUE	% OF MARKET VALUE
Agricultural Buildings	41	439.80	57,879	\$12,552,740	6.2%	\$42,358,011	6.9%
Agricultural Land	65	407.55	74,487	\$17,961,882	8.9%	\$43,468,097	7.0%
Commercial Buildings	28	889.42	30,374	\$19,932,918	9.9%	\$64,341,590	10.4%
Commercial Land	0	-	-	\$0	0.0%	\$0	0.0%
Exempt Improvements	2	0.46	1,344	\$317,745	0.2%	\$1,304,813	0.2%
Exempt Land	96	3,837.39	125,875	\$0	0.0%	\$10,543,055	1.7%
FAA	64	2,055.18	74,802	\$3,763,596	1.9%	\$45,476,933	7.4%
Residential Building Non Primary	5	2.88	5,097	\$1,702,764	0.8%	\$3,773,229	0.6%
Residential Building Primary	410	220.74	475,299	\$143,630,063	71.5%	\$404,775,588	65.5%
Residential Land Non Primary	6	3.36	2,075	\$1,080,000	0.5%	\$2,160,000	0.3%
State Assessed Land	12	587.56	14,602	\$5	0.0%	\$10	0.0%
Unknown	3	3.36	2,171	\$0	0.0%	\$0	0.0%
TOTAL SOUTH WILLARD	732	8,447.69	864,005	\$200,941,713	100%	\$618,201,326	100%

Source: Box Elder County Assessor's and Auditor's Offices



FIGURE 4.3: WILLARD ZONING MAP



AADT GROWTH

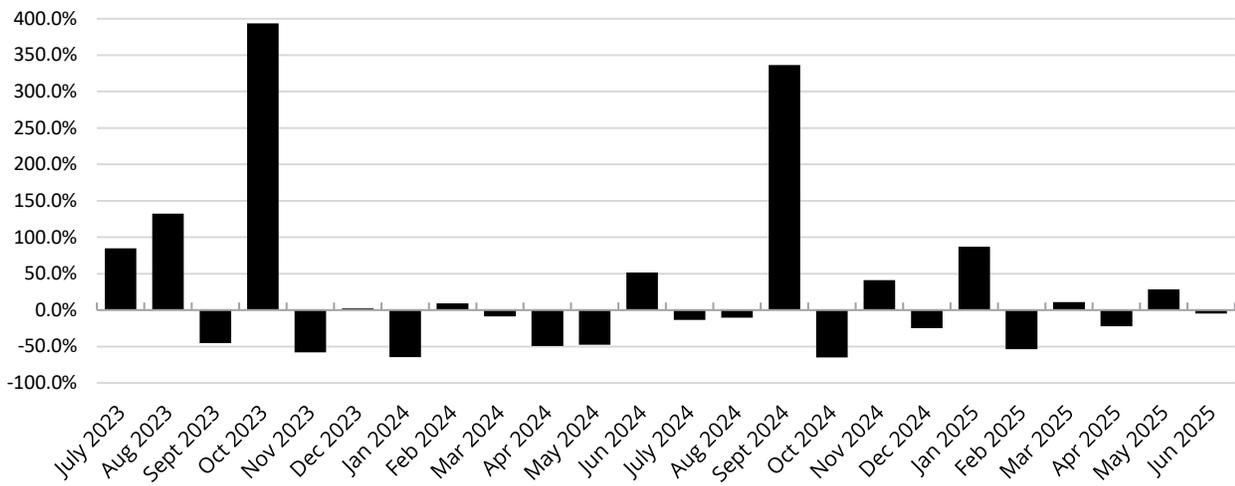
Proximity to a regional transportation network allows communities to attract larger developments like distribution centers or industrial centers, which in turn stimulate job growth and spending. Willard City is bordered by the Wasatch Mountain Range to the east, and Willard Bay State Park to the west. The City is accessible by two major roadways: I-15 and Highway 89. Average Annual Daily Trips (AADT) along these roadways range from 69,000 trips on I-15 and 14,000 trips on Highway 89. 750 North Street is another major corridor located within the City, with an AADT of 3,900. The trips on I-15 decrease to 60,000 trips north of 750 N as you enter Perry City.

WILLARD BAY VISITATION

Willard Bay, a top 5 state park with 824,000 visitors during fiscal year (FY) 2025, is one of Willard’s biggest attractions to visitors. A comparison of monthly visitation trends for Willard Bay illustrates the annual percent change from FY 2023 to FY 2025, as shown in **Figure 4.4**. Notable shifts occurred between October 2022 and October 2023, with visitation experiencing an increase of 393.8 percent.

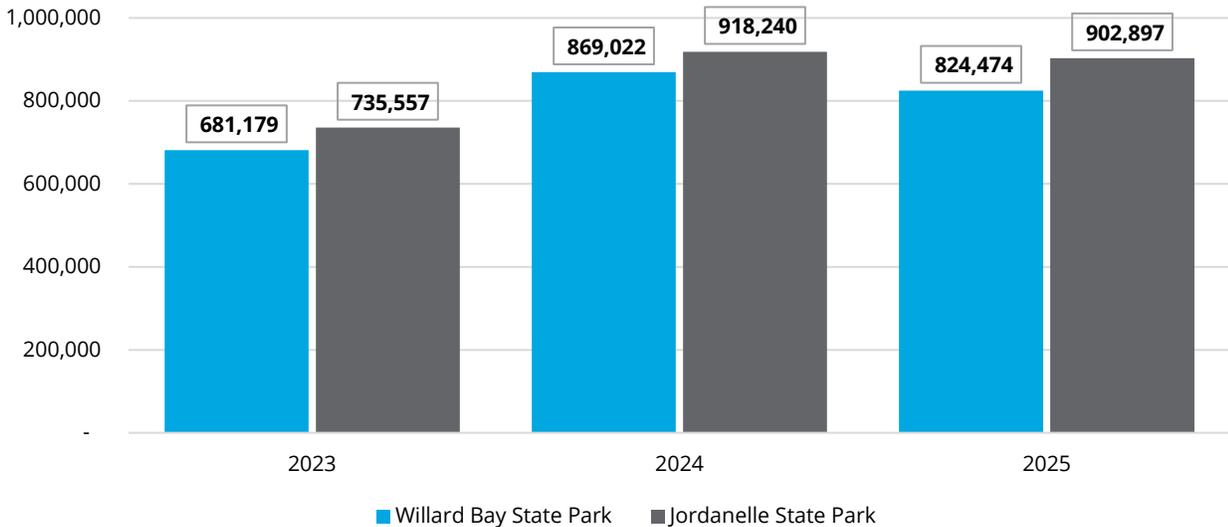
FIGURE 4.4: COMPARISON OF MONTHLY WILLARD BAY STATE PARK VISITATION TRENDS





In FY 2025, Willard Bay’s visitation ranked fifth out of all state parks. Of the state parks, Sand Hollow had the highest visitation numbers with over 1.3M visitors, followed by Dead Horse Point, Antelope Island, and Jordanelle state parks. **Figure 4.4** compares Willard Bay’s visitation to Jordanelle State Park’s from FY 2023 to FY 2025.

FIGURE 4.5: COMPARISON OF VISITATION (WILLARD BAY AND JORDANELLE STATE PARKS)

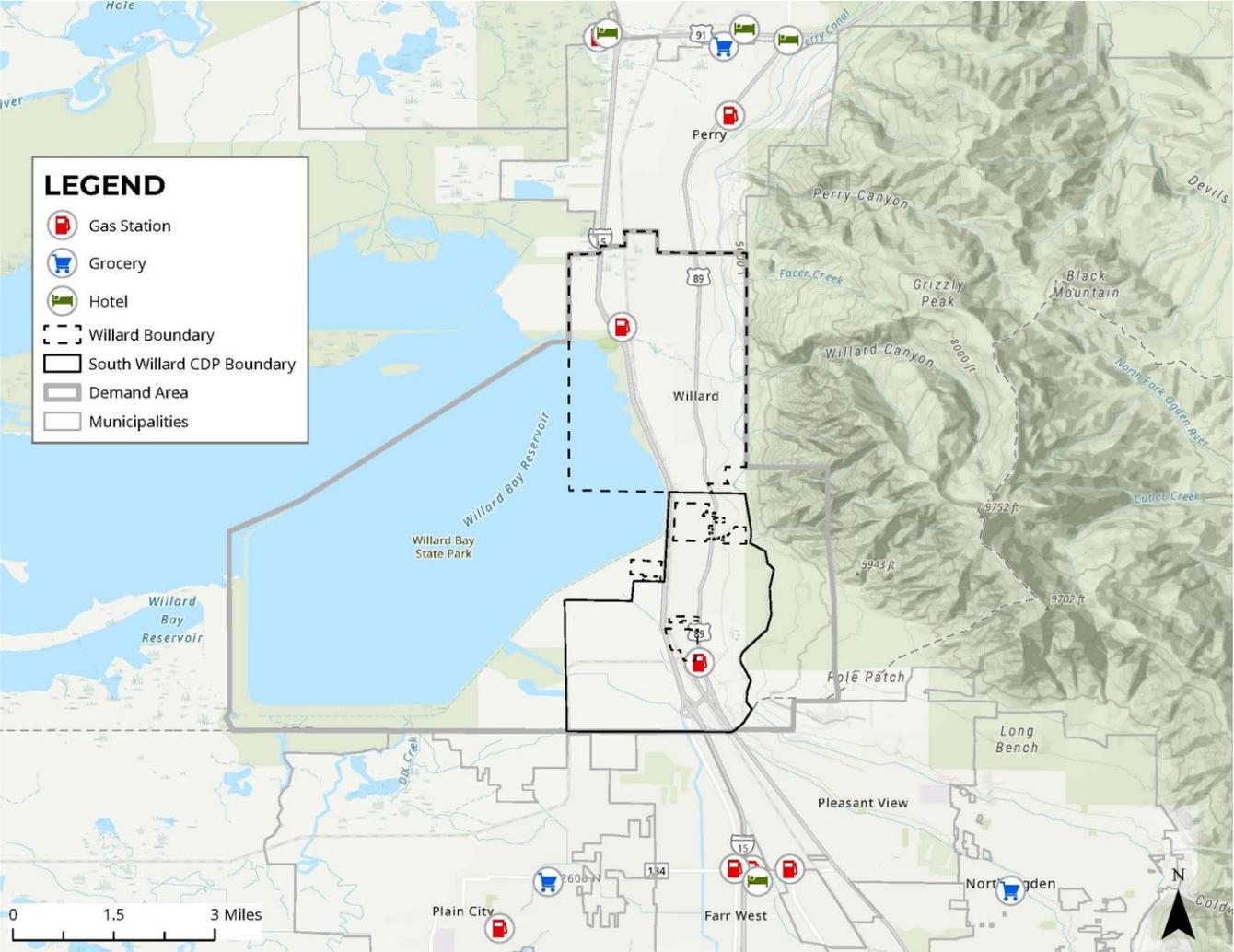


COMPETITIVE MARKET SITES

Discussions with stakeholders pointed to three potential markets compatible with the Plan’s development goals: gasoline stations, food and grocery stores, and overnight accommodation. This following analysis identifies the surrounding gasoline stations, food and grocery stores, and overnight accommodation market sites surrounding Willard City. Competitive market sites surrounding Willard City include neighborhood scale retail just north of the City’s boundaries in Perry and Brigham City, and in the adjacent communities of North Ogden, Pleasant View, Farr West, and Plain City.



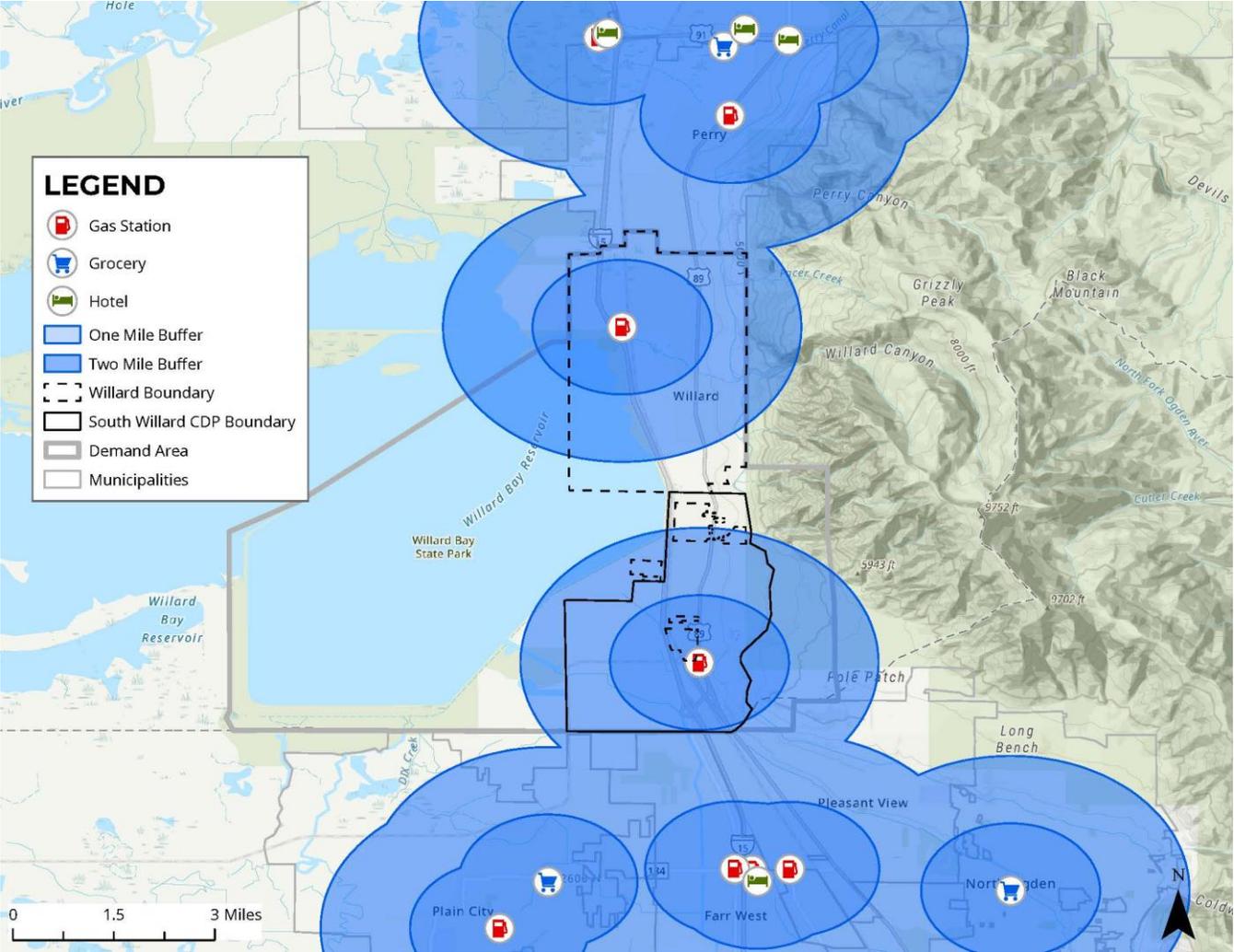
FIGURE 4.5: COMPETITIVE MARKET SITES



To illustrate growth potential near the Demand Area, two-mile geographic buffers of the regional market sites are included in **Figure 4.6**. There is no overlap within the Demand Area when a two-mile geographic buffer is mapped for hotel and grocery sites. When a two-mile buffer is applied to gas station market sites, two gas stations (Walmart, Fresh Market, and Smith’s Marketplace) overlap the Demand Area.



FIGURE 4.6: BUFFER OF COMPETITIVE MARKET SITES



SUPPORTABLE COMMERCIAL ZONING

To determine the supportable commercial zoning within Willard, this analysis evaluates future taxable sales growth and per capita spending by sector. This analysis provides an estimate of supportable acreage by the following categories: general retail, industry, services, and total commercial acreage.

EXAMPLE OF SUPPORTABLE COMMERCIAL DEVELOPMENT (NEIGHBORHOOD SCALE RETAIL)



The supportable commercial zoning methodology employed in this analysis utilizes estimated per capita spending of \$15,930 in Willard. Assuming a new population of 1,403 residents (2040 – 2025) within Willard and South Willard using TAZ estimates, the total supportable commercial zoning is estimated at approximately 81,285 SF or 17 acres. This assumes a median sales volume of \$275 per square foot of gross leasable area (GLA) and a floor area ratio (FAR) of 0.11.

TABLE 4.4: SUPPORTABLE COMMERCIAL ZONING BASED ON PER HOUSEHOLD SPENDING

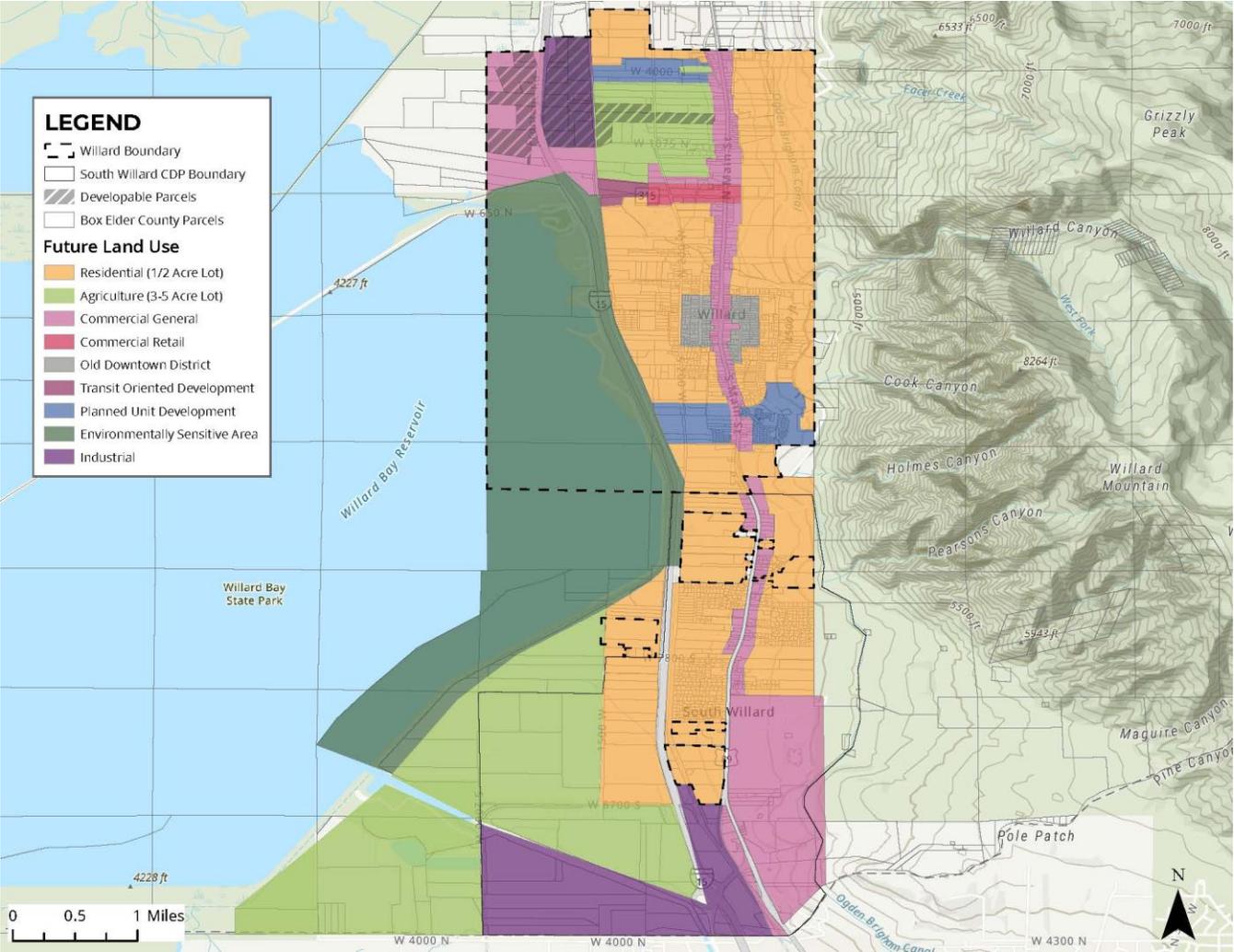
	GENERAL RETAIL	INDUSTRY	SERVICES	OTHER	TOTAL
Per Capita Spending (Income Adjusted)	\$10,492	\$2,779	\$1,742	\$917	\$15,930
New Growth	1,403	1,403	1,403	1,403	1,403
TOTAL SPENDING	\$14,721,888	\$3,899,890	\$2,444,183	\$1,287,363	\$22,353,325
Median Sales Volume Per SF of GLA	\$275	\$275	\$275	\$275	\$275
Supportable SF	53,534	14,181	8,888	4,681	81,285
General Commercial Floor to Area Ratio	0.11	0.11	0.11	0.11	0.11
Supportable Acres	11.2	3.0	1.9	1.0	17.0

FUTURE COMMERCIAL DEVELOPMENT

It is likely that commercial growth will be limited to currently planned and potential commercial zones. The focus of future commercial development will be neighborhood scale retail, which provides personal services, food services, and general retail purchases. It is expected that the City will rezone for industrial use north of 1075 North along I-15. As shown in **Figure 4.7**, the City is expecting approximately 15 to 20 acres of commercial planned or zoned within the rezone area which is near the baseline supportable commercial zoning. To achieve this target, the City may need to explore economic development financing tools or increased residential development to increase demand. Alternatively, the City may need to focus future commercial around existing nodes to strengthen these areas and achieve a sustainable commercial square footage threshold.



FIGURE 4.7: POTENTIAL COMMERCIAL DEVELOPMENT OVERLAY WITH FUTURE ZONING MAP



BARRIERS TO ENTRY

Some commercial development may be impacted by factors that serve as barriers toward unconstrained commercial growth within the community. These barriers may include growth in online sales, City ordinances, development costs, or geographic challenges. Future commercial development in Willard and South Willard may be hindered by these types of barriers. The following paragraphs discuss some of the barriers to entry that may exist within the City.

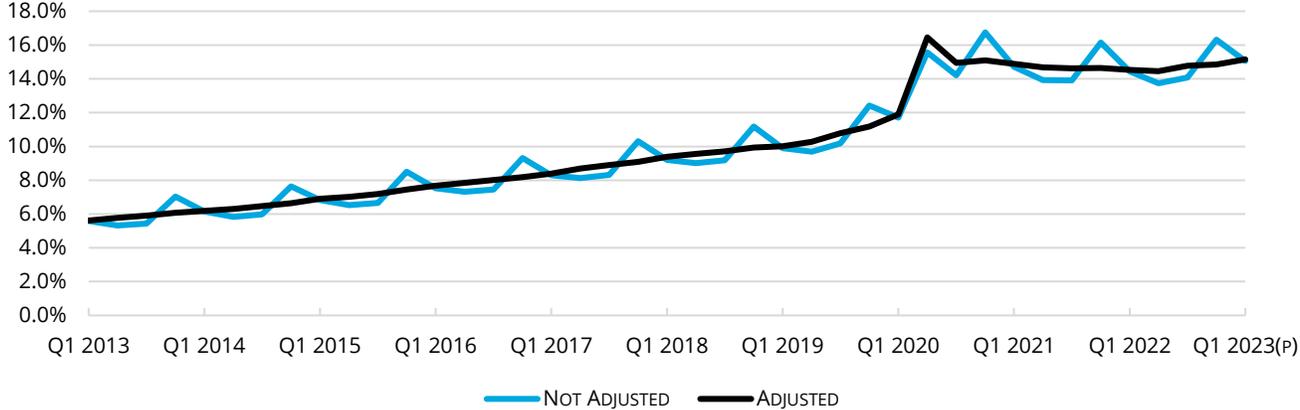
SHIFT TO ONLINE SALES

Online sales will continue to impact the traditional brick-and-mortar approach. The US Census Bureau’s estimate of retail e-commerce sales as percent of total quarterly retail sales continues to rise, increasing from nearly 5.6 percent in 2013 to 15.1 percent during the first quarter in 2023.⁹

⁹ Source: U.S. Census Bureau, Retail Indicators Branch



FIGURE 4:8 QUARTERLY U.S. RETAIL E-COMMERCE SALES AS A % OF TOTAL QUARTERLY RETAIL SALES



Monthly retail sales numbers by the Census Bureau show sales from non-store retailers like Amazon, eBay, QVC and Alibaba increase 6.5 percent from 2022 to 2023.¹⁰ This will likely result in a shift from location-based retail to online purchases. Methods to promote increased commercial development include:

- Allow for more residential development and population growth;
- Provide development incentives;
- Promote niche markets that will capture sales from surrounding communities;
- Remove barriers to entry; and,
- Promote other types of commercial development (industrial, tech, office, etc.).

LAND COST

Another barrier to entry may be the cost of land. A comparison of the total market value of land within Brigham City, South Willard, and versus Willard may illustrate the land value disparity. The total market value of all land within Brigham City is approximately \$1.8B. With a total of 26K acres of land, this equals nearly \$65K per acre. This data may be impacted by higher ratios of undevelopable, exempt, government, forest or other lower valued lands that are not as prevalent within a City. Willard’s estimated market land value per acre is \$200K.

TABLE 4.5: COMPARISON OF MARKET LAND VALUES

	TOTAL ACRES	MARKET LAND VALUE	MARKET VALUE PER ACRE
Brigham City	26,393.62	\$1,741,637,557	\$65,870
South Willard	8,447.69	\$284,319,190	\$73,180
Willard	4,134.58	\$200,941,713	\$199,674

Source: Box Elder County Parcels

DEVELOPMENT COST: IMPACT FEES

Many communities within Utah assess impact fees to offset the cost of needed infrastructure related to growth. Total impact fees vary from community based on level of service, age of infrastructure, proportional allocation of buy-in to new facilities, and the inclusion of financing mechanisms and inflation. While impact fees can be a barrier to limiting economic growth, municipalities have tools to mitigate this impact. These

¹⁰ Source: 2015 Annual Retail Trade Report <https://www.census.gov/retail/index.html>



include waiving or reducing impact fees, establishing redevelopment areas to fund infrastructure, or allowing development to provide information that may result in a reduced fee.

LOWER POPULATION AND ROOFTOPS

Willard's population is projected to increase through 2040, reaching 3,450 persons. South Willard is expected to grow to 2,588 by 2040. The population in Box Elder County will continue to concentrate in Brigham City, Mantua, Tremonton, and Perry cities. Weber County, located directly south of the Willard area, will also experience a significant growth when compared to Box Elder County.



SECTION 5. STAKEHOLDER OUTREACH AND SWOT

A SWOT Analysis is a strategic planning tool that allows the City to examine the strengths, weaknesses, opportunities, and threats (SWOT) as they relate to its economic development plan, offering valuable insights to guide future decision-making. LRB consulted with City staff and held stakeholder meetings to conduct a SWOT survey with business leaders, City Council members, and development partners. To solicit input related to a cohesive and comprehensive economic vision, a total of two separate in-person meetings were held. The first meeting held was on November 11th, 2024, with the second meeting being held on September 9th, 2025. As City leaders consider strategies for sustainable development, it is essential to evaluate both the internal and external factors that could influence success. Responses from stakeholders are utilized to develop economic development strategies presented in **Section 6** of this plan. The Willard SWOT Analysis included responses to the questions outlined in the following table:

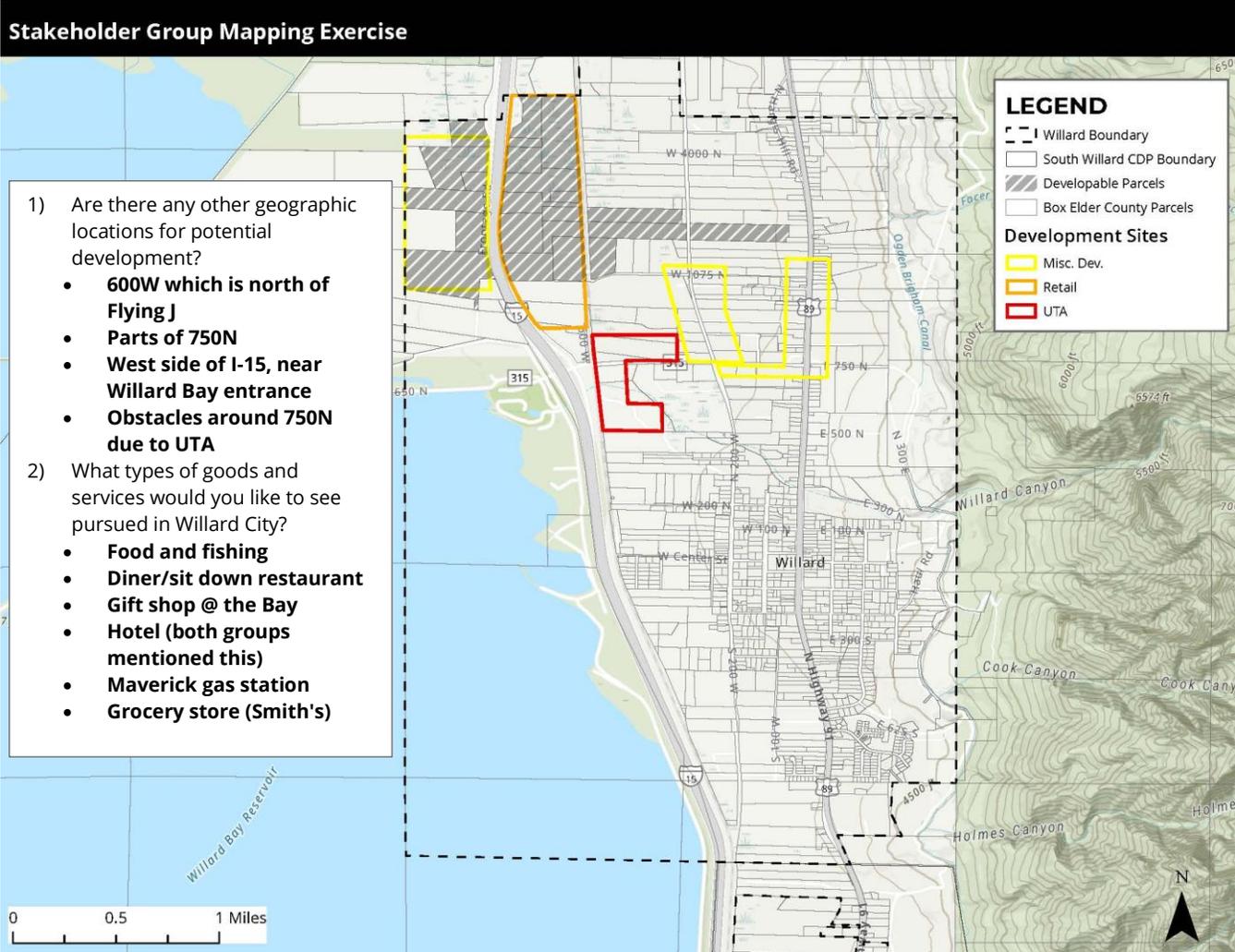
TABLE 5.1: SWOT ANALYSIS DESIGN

	POSITIVES	NEGATIVES
INTERNAL FACTORS	<p>STRENGTHS</p> <ul style="list-style-type: none"> • What is Willard known for? • What do you love about Willard? • What does Willard do that no one else does? • What unique and helpful resources are available to businesses and industries? • What specific competitive advantages do businesses and industries have by being in Willard? • What do local businesses and those outside the City see as Willard's strengths? 	<p>WEAKNESSES</p> <ul style="list-style-type: none"> • What are others likely to see as weaknesses in Willard? • Where are there fewer resources than in other counties? • What cannot be changed and what could the City improve? • What are the local risks that can limit economic development and investment success?
EXTERNAL FACTORS	<p>OPPORTUNITIES</p> <ul style="list-style-type: none"> • What opportunities exist for enhancing or supporting existing strengths that you identified? • What improvements or support could some of the weaknesses you identified benefit from? • What business and economic development trends could your community take advantage of? 	<p>THREATS</p> <ul style="list-style-type: none"> • What political, economic, or technological trends could harm the community? • What threats are facing other communities? • What threatens the key strengths you identified? • What threats do the City's weaknesses expose it to? • What threatens the opportunities you identified?



LRB collaborated with stakeholders on November 11, 2024, to identify potential key economic nodes within the City that could develop in the near term stimulating additional economic growth in the surrounding area. **Figure 5.1** depicts the identified sections of land, as well as a summarized notes from the stakeholder conversation. As discussed above, it is expected that the City will rezone for industrial use north of 1075 North along I-15. The City is expecting approximately 15 to 20 acres of commercial square footage planned or zoned within the rezone area which is near the baseline supportable commercial zoning. Other potential nodes identified include areas along 750 North.

FIGURE 5.1: GROUP MAPPING EXERCISE



The following summarizes responses by stakeholders to **Table 5.1** during the two in-person discussions held in Willard City. The SWOT matrix is outlined in **Figure 5.2**.

STRENGTHS

- Willard Bay State Park: Attracts tourism, supports recreational businesses, and generates revenue through visitor traffic.
- Annexed South Willard land: Expands developable area for residential, commercial, or industrial projects, offering long-term growth potential.
- Hiking trails: Enhance quality of life for residents and appeal to outdoor enthusiasts, bolstering local eco-tourism.
- Fruit farms: Identifiable industry that attracts demand outside of the City. Building on this existing industry will help the nurture its small-town character and existing businesses.

WEAKNESSES

- Aging water infrastructure: Limits capacity for new development and poses risks to existing residents and businesses during expansion. However, the City has plenty of water rights.
- Economies of scale: As future commercial growth will continue to follow rooftops, the City's low population density will require the City to identify alternative strategies to facilitate economic growth.
- Concern over Development: Residential property owners have voiced concern over any new development.

OPPORTUNITIES

- UTA Frontrunner integration: Improved connectivity to Ogden and Salt Lake City could attract commuters, stimulate transit-oriented development, and increase property values.
- South Willard land development: Strategic zoning for mixed-use projects or light industry could diversify the tax base and create jobs.
- South Marina Annexation: Providing boat launching, camping, and day-use facilities, the South Marina attracts tourism to the State Park. The City noted that annexing this section of Willard Bay could occur in the next decade or two.
- Rezoning Efforts: The City is in the process of rezoning the Old Downtown Willard (ODW) to allow and encourage neighborhood-scale commercial development. The City is also in the process of rezoning parcels located north of Flying J into industrial land use. The property owner of this area has goals of dedicating 15 – 20 acres to retail.
- Gravel Pits: Stakeholders noted that gravel pits present an opportunity and threat (see below). While the City doesn't want to incentivize any new gravel pits, the City can generate revenue and turn existing gravel pits into developable property.

THREATS

- Wetland preservation requirements: Environmental regulations may restrict development in sensitive areas, increasing costs or delaying projects.
- Gravel pits: Community members have voiced objections to the existing gravel pits in the City's foothills, which abut residential areas.



FIGURE 5.2: STAKEHOLDER SWOT MATRIX



SECTION 6. ECONOMIC DEVELOPMENT STRATEGIC PLAN

The primary objective of this document is to reconfirm existing strategies while identifying any new strategies based on stakeholder feedback. Below is an outline of historic goals from the 2023 General Plan:

- Evaluate all City decisions, actions, and budget expenditures to achieve General Plan consistency.
- Protect the City's naturally occurring sensitive lands, views, features, and other amenities.
- Protect the City's agricultural areas.
- Promote efficiencies in the use of all water resources and protect local water sources.
- Encourage retail businesses to support the City's tax and employment base and to provide additional opportunities for residents to meet their daily living needs in Willard.
- Increase opportunities for all residents to engage in remote work and learning.
- Protect and enhance Willard's historic town core.
- Continue to require quality developments that promote and enhance the City's small-town character and ambiance and to remain a safe and desired location for residential and nonresidential uses.

PROPOSED ECONOMIC DEVELOPEMENT STRATEGIES

In addition to the above goals selected by the City, LRB suggests the following economic development strategies to reflect stakeholder responses, with the City's objectives and existing strategies for economic development serve as the foundational objectives.

1. GROW A FOUR-SEASON RECREATION AND AGRI-TOURISM ECONOMY:

Leverage Willard's strengths— Willard Bay State Park, hiking trails, fruit farms, and future South Willard annexation— to drive visitor spending while reinforcing small-town character.

Initiatives

- Create a "Gateway to Willard Bay & Fruit Country" brand with wayfinding, trailheads, and farm-to-trail itineraries (u-pick orchards, markets, cycling loops).
- Launch a seasonal events calendar (blossom/harvest festivals, trail races, bay activities) and a weekly Historic Downtown Willard market.
- Prepare a South Marina annexation & services feasibility (utilities, safety, fee structure) and a joint programming plan with State Parks.
- Offer microgrants for farm stands, outfitters, guides, and bed and breakfasts (façade, signage, e-commerce).

Funding/Tools:

- RAP/Parks taxes (if applicable),
- Transient Room Tax (TRT) partnerships,
- Utah Office of Tourism (UOT) Cooperative Marketing Grant or EDA ARPA Grant,
- USDA Rural Development,
- Private sponsorships, and
- Business Improvement District (BID)/Special Improvement District (SID) in ODW zoning district.



2. DIVERSIFY THE TAX BASE WITH JOB-CREATING LIGHT INDUSTRIAL & MIXED-USE NODES:

Convert annexed South Willard land and the north industrial corridor (north of Flying J) into employment and neighborhood-scale retail to reduce reliance on rooftops.

Initiatives

- Adopt/implement zoning for: (a) clean light industrial/flex, (b) mixed-use village with neighborhood retail in Historic Downtown Willard, and (c) 15–20 acres of highway-oriented retail north of Flying J.
- Establish a 3–5-site “shovel-ready” program (permitting playbook, environmental due diligence, site utilities, pad-ready specs).
- Identify target sectors (outdoor gear, food processing/packaging tied to fruit farms, small logistics, craft manufacturing).
- Streamline approvals by implementing development agreements with clear design standards and expedited review for target-sector projects.

Funding/Tools:

- RDA/CRA for infrastructure funding,
- Utah GOED incentives, and
- Private site prep cost-share.

3. MODERNIZE WATER AND GROWTH INFRASTRUCTURE TO UNLOCK CAPACITY WITHOUT LOSING RURAL CHARACTER:

The City has water rights but needs delivery capacity and sequencing. With an aging water system and wetland preservation and service limits, growth is constrained and risk is increased.

Initiatives

- Complete a Growth-Sequencing Capital Improvement Plan (CIP) for water, roads, and drainage with wetlands avoidance/mitigation mapped up front.
- Update impact fees and adopt cost-recovery agreements (latecomer/recapture).
- Form special districts (Public Infrastructure District (PID)/assessment) to front-load trunk lines and storage.
- Publish a “developer infrastructure checklist” and a model development agreement to reduce uncertainty.

Funding/Tools:

- Impact fees,
- State/WIFIA/USDA Water Loans,
- EDA/Community Project Funding,
- RDA/CRA for infrastructure funding, and
- Developer reimbursement agreements.

4. MANAGE GROWTH TO PROTECT FARMS, NEIGHBORHOODS, AND VIEWSHEDS:

Community concern over development and gravel pits requires predictable, place-sensitive growth that preserves agriculture and quality of life.



Initiatives

- Adopt an Ag Preservation Toolkit: agriculture overlay with permitted Agri-tourism, cluster/open-space subdivisions, conservation easements, and buffer standards along orchards.
- Reclaim & repurpose existing gravel pits through a “Reclamation to Redevelopment” plan (stability, drainage, phased fill, future flex/park uses); prohibit new pits via zoning.
- Create a small-area plan for a future transit-supported node (Frontrunner integration) with a TOD overlay, parking management, and first/last-mile trail links that is scaled to Willard’s context.
- Establish a ODW Main Street plan: walkable design, façade program, upper-story residential over shops, traffic calming.

Funding/Tools:

- Transfer of Development Rights (TDR) or Purchases of Development Rights (PDR) where feasible,
- Land & Water Conservation Fund (trails/parks),
- UDOT TAP/active transportation funds,
- CRA for ODW zoning district, and
- Developer exactions for buffers.

SECTION 7. ADDITIONAL FINANCIAL TOOLS

There are a wide variety of tools and incentives available to help achieve economic development goals. In addition to the tools identified in the **Section 6**, below is a brief description of several resources available to the City. Some tools may require the City to identify funding sources to support local programs.

LOCAL FINANCING & TAX TOOLS

1. Redevelopment Agencies (RDAs) – Cities can create project areas and capture Tax Increment Financing (TIF) to support infrastructure, site preparation, or incentives.
2. Community Development Areas (CDAs) – Broader redevelopment areas with flexible uses of TIF.
3. Economic Development Areas (EDAs) – TIF for specific business/industry attraction (e.g., industrial parks).
4. Public Infrastructure Districts (PIDs) – Financing mechanism (like special assessment districts) for roads, utilities, and amenities.
5. Municipal Bonds – General obligation or revenue bonds for infrastructure supporting development.

BUSINESS SUPPORT TOOLS

1. Small Business Development Centers (SBDCs) – Technical assistance, training, and mentoring.
2. Business Resource Centers (BRCs) – Support for startups, entrepreneurs, and expansion.
3. Revolving Loan Funds (RLFs) – Often set up regionally to provide gap financing.
4. Business Retention & Expansion (BRE) Programs – Local city programs to support existing businesses.

QUALITY OF PLACE & INFRASTRUCTURE TOOLS

1. Downtown Revitalization Programs – Façade improvement grants, main street programs, streetscape upgrades.
2. Housing & Mixed-Use Incentives – Partnering with developers on workforce housing and walkable districts.
3. Transportation Investments – Coordinating with UDOT, UTA, and MPOs for regional mobility.

COLLABORATION & MARKETING

1. Place Branding & Marketing Campaigns – Positioning the city as business-friendly.

