

# Greater Payson Area Economic Development Strategic Plan

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# TABLE OF CONTENTS

- Executive Summary..... 1
  - Planning Process Overview..... 1
  - The Opportunity..... 2
  - The Challenge..... 3
  - The Vision..... 4
  - The Strategy ..... 4
- 1. Economic Landscape..... 7
  - Population Growth..... 7
  - Age and Ethnicity ..... 9
  - Income ..... 11
  - Educational Attainment ..... 11
  - Labor Force and Employment..... 12
- 2. Competitive Assessment..... 17
  - Talent ..... 17
  - Market Trade Area ..... 19
  - Infrastructure ..... 23
  - Airport..... 25
  - Sites and Buildings ..... 25
- 3. Industry Targets ..... 26
  - Methodology..... 26
  - Industry Targets ..... 29
  - Key Site Location Drivers ..... 33
  - Cluster Occupations ..... 37
- 4. Strategic Plan ..... 38
  - Potential Opportunities ..... 38
  - Local Challenges..... 41
  - Vision and Guiding Principles..... 43
  - Economic Development Strategy ..... 43
- Appendix A – SWOT ..... A-1
- Appendix B – Cluster Industry Analysis ..... B-1

## LIST OF TABLES

Table 1 – Economic Development Plan Key Initiatives and Goals .....	5
Table 2 – Population Growth Rate Comparison, Payson, Gila County, Arizona (1990-2015).....	7
Table 3 – Age Cohort Comparison, Payson and Arizona.....	9
Table 4 – Town of Payson Race and Ethnicity.....	10
Table 5 – Civilian Labor Force 16 Years and Older .....	12
Table 6 – Employment by Industry, Payson, Gila County and Arizona .....	13
Table 7 – Payson In-Flow Outflow Worker Characteristics, 2014.....	15
Table 8 – Payson Location of Employment/Residence 2014.....	16
Table 9 – Key SWOT Findings.....	17
Table 10 – Arizona’s Instrument to Measure Standards (AIMS) Results, Fiscal Year 2014 .....	19
Table 11 – Demographic Comparison Payson, 30 Minute Drive Time and Market Trade Area .....	20
Table 12 – Town of Payson Leakage/Surplus Factor.....	21
Table 13 – Employment by Industry Cluster.....	28
Table 14 – Industry Cluster Shortlist.....	31
Table 15 – Industry Cluster Site Location Criteria.....	34
Table 16 – Industry Cluster Key Occupations .....	37
Table 17 – ACA Rural Prospect Activity and Requested Building Size .....	41

## LIST OF FIGURES

Figure 1 – Payson Population Compounded Annualized Growth Rate and Projections .....	8
Figure 3 – Gila County Population Components and Population Change (2015-2030).....	9
Figure 2 – Town of Payson Age Cohorts by Gender.....	10
Figure 4 – Median Household Income .....	11
Figure 5 – Highest Level of Educational Attainment.....	12
Figure 6 – Unemployment Rates, 2005-2015 .....	13
Figure 7 – Occupations.....	14
Figure 8 – Payson Worker Inflow-Outflow.....	15
Figure 9 – Payson Market Trade Area and 30 Minute Drive Time.....	20
Figure 10 – Payson Sales Tax Collections Per Capita, 2010-2015 .....	21
Figure 11 – Town of Payson Retail Leakage/Surplus Index .....	22
Figure 12 – Payson Industry Sector Concentration and Employment Growth.....	27

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Prepared by ESI Corp



Real Estate and Economic Development Counselors Since 1990

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## Acronyms and Abbreviations

ACA	Arizona Commerce Authority
ACS	American Community Survey
AIMS	Arizona’s Instrument to Measure Standards
AOT	Arizona Office of Tourism
APS	Arizona Public Service
ASU	Arizona State University
AzMERIT	Arizona's Measurement of Educational Readiness to Inform Teaching
BLS	U.S. Bureau of Labor Statistics
BRE	Business Retention and Expansion
CAGR	Compound Annual Growth Rate
CIP	Capital Improvements Plan
CTE	Career Technical Education
CVIT	Cobre Valley Institute of Technology
EDAC	Economic Development Advisory Committee
EDO	Economic Development Organization
Emp	Employment
GPEC	Greater Phoenix Economic Council
IDA	Industrial Development Authority
LQ	Location Quotient
MHA	Mogollon Health Alliance Foundation
NAICS	North America Industrial Classification System
NAVIT	Northern Arizona Vocational Institute of Technology
NEAZIWS	Northeastern Arizona Workforce Solutions
NGCEDC	Northern Gila County Economic Development Corporation
PUSD	Payson Unified School District
RCEF	Rim Country Education Foundation
SBDC	Small Business Development Center
SCORE	Service Corp of Retired Executives
STEM	Science, Technology, Engineering and Math
SWOT	Strength, Weaknesses, Opportunities and Threats





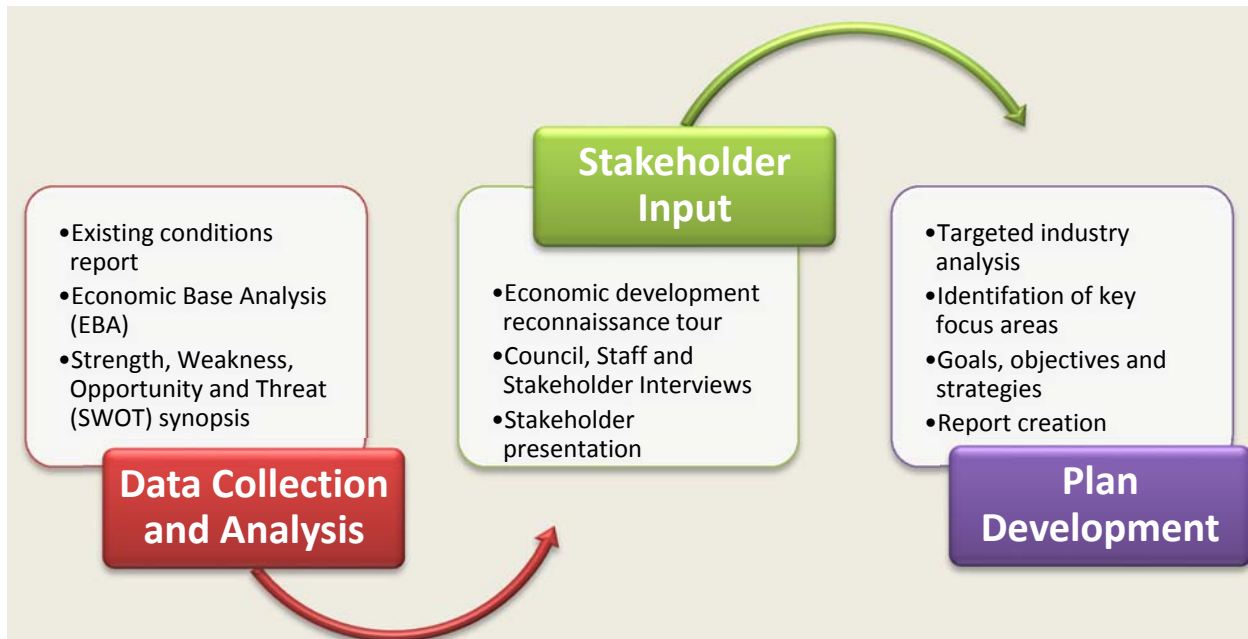
# Executive Summary

The Town of Payson has been actively involved in economic development since 2005 when the community underwent a Focused Future II planning process sponsored by APS. The planning process included broad based citizen input and was driven by an Action Team. The Focused Future plan was subsequently updated in 2007. Since then, the Town of Payson and the region have grown in population, however the annual growth rate has been slower than the state as a whole. Job creation has been highly concentrated in the hospitality sectors of retail trade and arts, entertainment, recreation and food services, due to the large number of tourists that either visit or pass through Payson on their way to other destinations. Overall, the industries within these two sectors pay less than \$20,000 a year, on average. Due to the lack of higher wage jobs, a large percentage of Payson residents out commute to jobs in the Phoenix metro area.

Today, civic and community leaders would like to forge a new path and take a proactive approach in identifying economic development opportunities and strategies that will help grow the economy and create quality jobs. The objective of this Economic Development Strategic Plan is to focus on economic diversification, the creation of higher wage jobs and to capture a larger share of tourism spending. Business attraction and entrepreneurship will stimulate economic vitality in the community, but will require strategically investing in community enhancements and improving education performance.

## Planning Process Overview

The Economic Development Plan process included the review of existing studies and reports, extensive stakeholder input through one-on-one interviews, and a presentation with stakeholders to solicit feedback on preliminary information.



An economic base analysis was prepared to identify socio demographic trends comparing Payson to Gila County and the State of Arizona. In addition, an analysis of industries within the Payson region was conducted to detect industry growth, employment concentration and employment trends, and identify industry clusters. The culmination of this work is the creation of the Five-Year Economic Development Strategic Plan.

## *The Opportunity*

The Town of Payson is the trade center for northern Gila County and has experienced steady population and employment growth since the year 2000. Given its elevation and geographic location within the Rim Country, Payson is the beneficiary of visitors who attend staged events at the Payson Event Center or take advantage of the abundant outdoor recreational opportunities. Many visitors also drive through the Town on their way to another destination and spend a limited amount of time and money in Payson. Given the size of the Payson trade area, combined with the temporary influx of visitors, the community has been successful in attracting big box retail and limited service restaurants.

Community leaders would like to increase wages by diversifying the economic base and focusing on strategies that ignite the economy including business attraction, retention and entrepreneurship. In addition, they would like to boost their reputation as a visitor destination and capture more spending, which will enhance the local tax base.

The community has several key assets in place or proposed projects that could catalyze economic growth including:

- The Town Center and its ability to be a vibrant destination for local residents and visitors.
- The American Gulch Project, which is a storm water drainage project that would be connected to the Green Valley Lake. This project has the potential to be a recreational amenity adjacent to the Town Center providing trails for walking and biking.
- The Multi-University campus that is currently in the engineering and design stages and is slated to be the home to a four-year university campus and has the potential to attract other higher educational institutions, as well as foster spin off activity and R&D operations.
- The Payson Municipal Airport that includes the Sky Park Industrial Center, which is home to several key business establishments, along with the surrounding undeveloped employment land uses that have the potential to accommodate additional manufacturing operations.
- Completion of the trails within Town that connect to regional trails in the area, which will allow for greater recreational activity and the attraction of more visitors.
- Improvements at the Payson Event Center that would facilitate the attraction of new events that bring people to Payson.

Payson's advantages include a desirable quality of life, a small town feel and a climate that provides four seasons, all of which is conducive to attracting people and business.

## *The Challenge*

Payson residents are aging in place. During the 2010 Census the median age was 53 years old, which is up from 49 years of age reported during the 2000 census. This statistic can be a deterrent to attracting new business who may believe that a skilled workforce is not available. The current job market is concentrated in the hospitality sectors, which is predominantly lower paying. Compounding the problem of finding an available skilled workforce is the preponderance of low wage jobs that make it difficult to recruit professionals to the town.

Higher educational attainment rates lag the state as a whole and the median household income, while growing, is also less than the State. According to a recent study conducted by College Success Arizona, a college graduate will have on average \$1.1 million in lifetime earnings compared to a high school graduate at \$530,340. The college graduate would contribute \$660,000 to the economy over his or her lifetime through increased earnings, paying more in taxes and depending less on social services. Increasing the number of college graduates will be critically important to Payson's competitiveness.

Students in Payson graduating from high school have a choice to make about their future. Some will choose to attend the community college or secure a job in the service sector in Payson. Others may leave town for other job opportunities or to attend a four-year university. It is reported that when students leave, they typically don't come back due to the lack of career oriented well-paying jobs in Payson. This results in the drain of intellectual capacity within the Town, which becomes challenging when trying to recruit technology based companies.

The Town experienced several internet and cellular communication outages during the past year that had a detrimental effect on the community. Banner Health was unable to properly treat patients, merchants could not process credit card payments, and residents lost the ability to utilize 911 emergency service. Town leaders have come together to collectively address the problem and have identified a solution that would provide some redundancy in the system and prevent the Town from being vulnerable in the future. Funding to expand the system, however, is not readily available, but without it the Town will continue to be at risk to future outages.

Over the years many plans have been prepared for the Town including Main Street Vision and Streetscape Plan, the American Gulch Project, as well as recommendations to solve transportation issues. But due to a combination of inertia, lack of funding or public support these projects have not moved forward. In order to foster economic development, public investment must be prioritized and aimed at a variety of infrastructure projects to support job growth. These public investments will set the stage for private sector investment/development to follow. Without this, Payson will continue to fall behind.

One of the first steps in the site selection process is the identification of existing buildings or shovel ready sites. The Town is currently missing out on prospect activity due to the lack of existing buildings to accommodate office or industrial prospects. According to the Arizona Commerce Authority (ACA) and the Greater Phoenix Economic Council (GPEC), 80 percent of their prospects are looking for existing space.

The final challenge the Town has when it comes to economic development is the high cost of the Town's development impact fees, as compared to Payson's competition. This becomes a barrier to entry for small business and Town Center revitalization. Fostering the growth of small business and promoting the adaptive reuse of existing buildings in the Town Center will require a review of these fees and a more creative approach to lessen the burden. There is a need to raise the economic development bar by

incorporating the tools required to promote economic development, which could include a dedicated source of funding (similar to the tourism program) and an economic investment program geared towards targeted industries.

## *The Vision*

The vision statement included within the 2007 updated Focused Future Plan was modified to reflect current community vision, ideals and values. This strategic plan is designed to support and bring about the preferred future envisioned by the Town and its stakeholders. The vision statement that anchors this plan is as follows:

***Payson has a strong, diverse and sustainable economy driven by collaboration, innovation, entrepreneurship, quality education, and life-long learning.***

The future is not just someplace where we are going, but a place that needs to be created.  
---Joel Kotkin

To further elaborate upon the vision, the stakeholders have identified key values and fundamental principles, which help underpin the goals and strategies of the plan.

1. Payson has an outstanding quality of life, a vibrant Town Center, community amenities, quality educational options, and an environment that fosters collaboration.
2. Payson strategically plans for growth and has the necessary infrastructure in place to foster a diverse tax base, attract private investment and create higher wage jobs for its residents.
3. Payson draws upon its rich heritage and natural resources and is recognized as an exceptional visitor destination that includes entertainment and recreational options including camping, hunting and fishing and a multi-use trail system for hiking and biking.
4. Payson is dedicated to enhancing its economic vitality, fostering the growth of high wage jobs, and cultivating life-long learning, entrepreneurship and innovation.

## *The Strategy*

To help the Town pinpoint industries that have the highest probability of expanding or locating in Payson, an industry target analysis was prepared which resulted in the following five industry targets.

- Tourism and Hospitality
- Healthcare
- Niche Manufacturing
  - Firearms/Munitions Manufacturing
  - Wood Products
  - Computer and Electronic Products
- Software and Information Technology
- Business and Financial Services

A special focus on entrepreneurship and growing small local business is also the subject of this strategic plan. The Town, in partnership with others, can have a major impact on the economy by fostering the

growth of new business, which will in turn increase the volume and velocity of income within the community.

The economic development strategy is designed around six key initiatives which are anchored with overarching goals, as noted in Table 1. These major initiatives build on the Town's strengths to ensure long-term economic vitality and the enhancement of the quality of life.

Each key initiative is guided by an overarching goal, which is followed by objectives and action steps. These goals will drive the implementation of the plan.

**Table 1 – Economic Development Plan Key Initiatives and Goals**

Key Initiative	Goal
Job Creation	Diversify the economy and create higher wage jobs.
Town Center	Create a vibrant town center that becomes the one neighborhood shared by all.
Talent Development and Life Long Learning	Be the home to a competitive educational and workforce development system.
Entrepreneurship and Innovation	Create an entrepreneurial culture that stimulates the creation of new business.
Livable Community	Deliver the basic framework for a healthy and sustainable economy.
Marketing and Promotion	Create a robust economic development and tourism marketing program.

Achieving the goals of the strategic plan requires an equal focus on job growth, product improvement and marketing and promotion. Implementation of the economic development strategy will:

- Generate robust job growth within industry clusters by maximizing the assets that Payson has;
- Promote job creation and revenue generation of small business and local entrepreneurs;
- Guide investment in infrastructure and other capital projects to stimulate private sector development and job growth;
- Develop the marketing tools to effectively reach its target audience.

Each key initiative is anchored with a goal followed by several objectives and a series of strategies or implementation steps. Identification of short term (1-2 years) versus long term strategies (3-5 years) will determine the timing for achieving desired outcomes. Performance measures are established to track progress in achievement of desired outcomes. Performance measures have also been identified for each initiative, along with the lead and supporting organizations taking responsibility for implementation.

The success of this ambitious strategy requires alignment of goals and funding priorities between town departments and organizations. Equally important is the Town's collaboration with public and private sector partners throughout the community/region to carry out the actions outlined in the strategy. To accomplish this, it is highly recommended that an Economic Development Advisory Committee (EDAC) be appointed by the Town Council to work with the Town in support of key economic development initiatives and provide input on the plan direction and future updates.

Membership composition of EDAC should be broad based and include representatives from: healthcare, education (PUSD and Gila Community College), workforce development, manufacturing, tourism, finance, real estate brokerage and development, utilities, as well as strategic partners such as the Chamber of Commerce, Payson IDA, and others as appropriate. Operating guidelines, including the term of appointment should be established and the EDAC should meet monthly with the chair and vice-chair of the committee elected by the EDAC. Implementation and oversight of the strategy will be managed by the Community Development Department, Economic Development Division.

Without adequate resources this economic development plan will not be successful. This strategy requires reliable multi-year operating support for the key initiatives, including work that supports job growth, capital improvements that foster economic development, and marketing and promotion that brands and propels the community forward.

# 1. Economic Landscape

The Town of Payson is centrally located in Arizona within Gila County and is approximately a 90 minute drive time from the Phoenix Metropolitan area. Payson is surrounded by forest lands and boasts a diverse range of outdoor recreational activities such as camping, fishing, hunting, hiking and mountain biking. The community enjoys cooler temperatures year round which attracts seasonal residents as well as visitors. Its economy is rooted in tourism, healthcare, government and educational services. To gain a complete understanding of growth trends and socio-demographics of the Town, an analysis was prepared.

## Highlights

- Population growth rate is slowing for both Payson and Gila County. By 2027 Gila County is projected to have negative population growth.
- The median age of Payson residents is 55.5 years old. The percentage of working age adults and those under the age of 24 is significantly less than the state as a whole.
- Payson’s median household income has increase 28 percent over the last 14 years.
- Payson’s higher educational attainment rate and median household income exceeds Gila County, but lags Arizona.
- Payson’s unemployment rate has been consistently below the County and State, with the exception for 2015.
- Employment is concentrated in Educational Services and Health Care, and Arts, Entertainment, Recreation and Accommodations, and Retail Trade industry sectors.
- 67 percent of Payson’s residents out-commute to jobs in other cities and nearly 59 percent of Payson jobs are filled by nonresidents who commute into Payson.

## Population Growth

Today the Town of Payson has a population of 15,674 people, which represents 29 percent of Gila County’s population. Over the last 25 years the rate of growth for Payson has slowed considerable and today is nearly one-half of the growth rate for the State as a whole. Payson has consistently outpaced the Gila County’s growth rate for each time period.

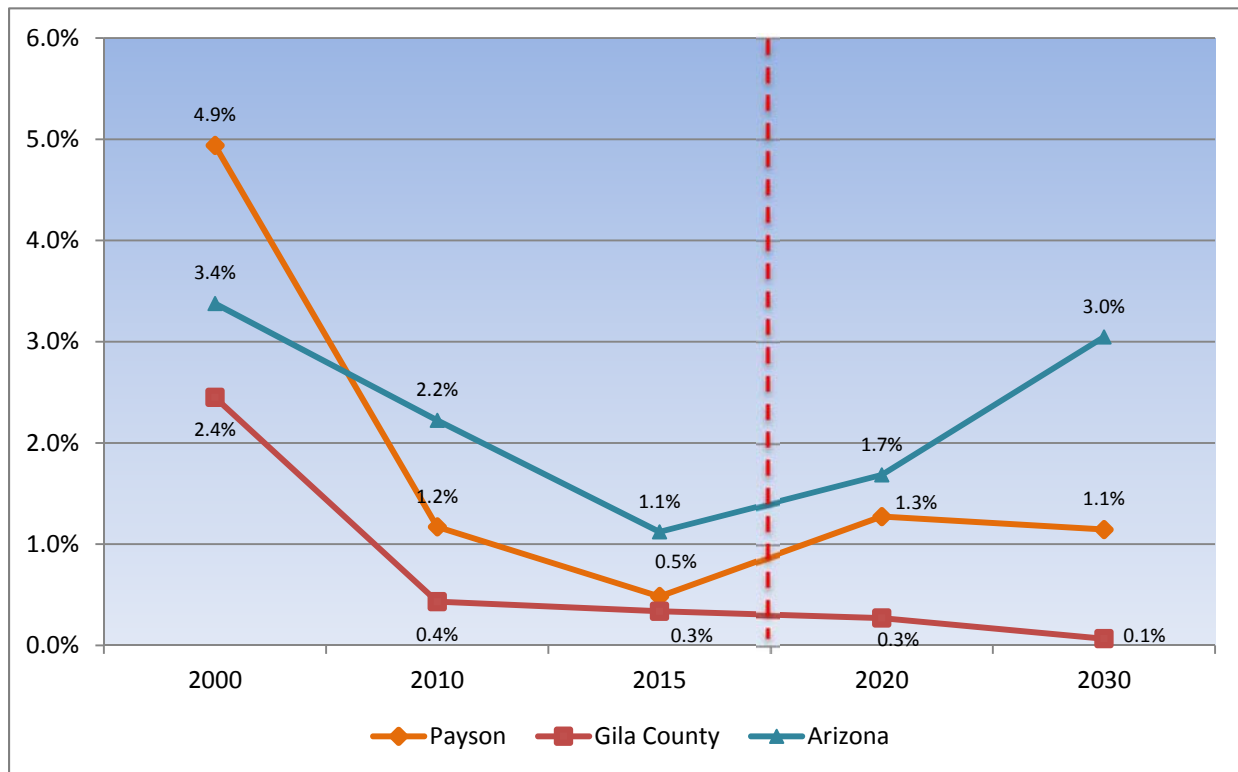
**Table 2 – Population Growth Rate Comparison, Payson, Gila County, Arizona (1990-2015)**

Year	Payson		Gila County		Arizona	
	Count	Growth Rate	Count	Growth Rate	Count	Growth Rate
1990	8,410		40,300		3,680,800	
2000	13,620	62.0%	51,335	2.4%	5,130,632	39.4%
2010	15,301	12.3%	53,597	0.4%	6,392,017	24.6%
2015	15,674	2.4%	54,406	0.3%	6,758,251	5.7%

Source: U.S. Census 1990, 2000, 2010; Arizona Department of Administration 2015

The following chart illustrates the annualized compounded growth rate and population projections through the year 2030 for Payson, compared to the county and the state. Payson growth projections consistently exceeds Gila County's but lags the State as a whole. Between the years 2015 and 2020 Payson's annualized rate of growth is projected to accelerate, but then slow down starting 2020 through 2030. Gila County's rate of growth is expected to decline beginning 2027.

**Figure 1 – Payson Population Compounded Annualized Growth Rate and Projections**



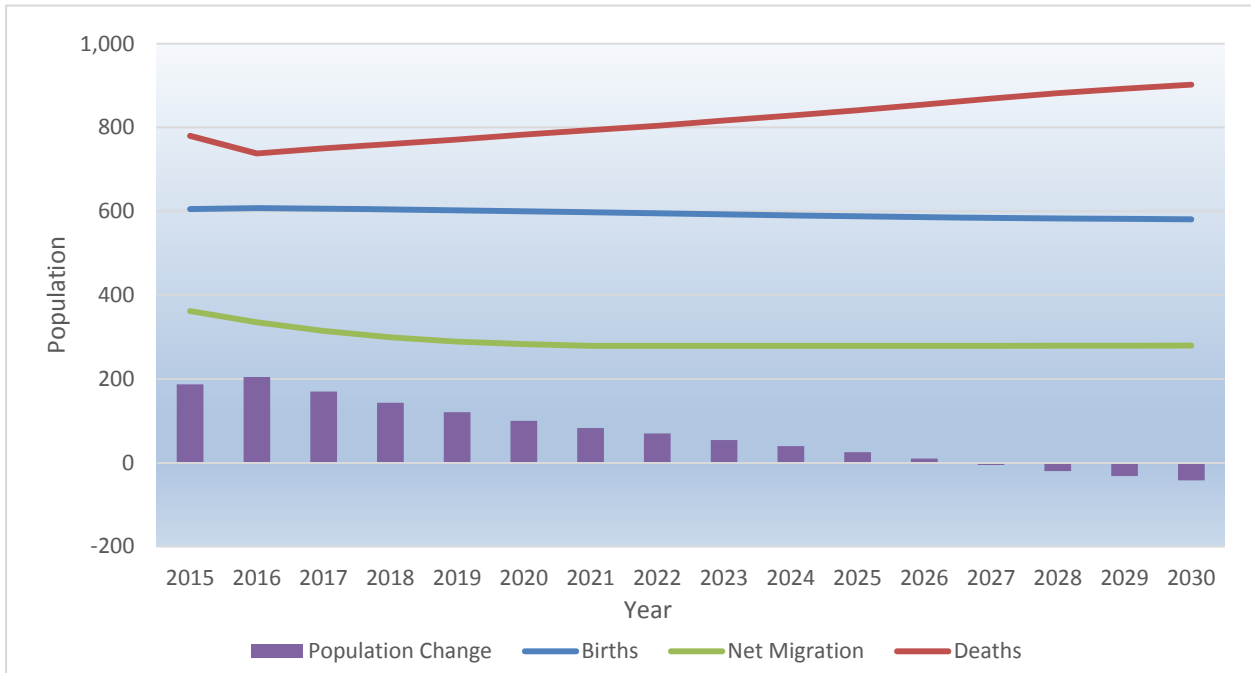
Source: US Census 2000 and 2010; CAG Payson 2015, 2020 and 2030

Arizona Department of Administration, Office of Employment & Population Statistics, Gila County and Arizona 2020 and 2030, 12/11/2015.

When examining what accounts for population change such as births, deaths and in migration, the Arizona Office of Employment and Population Statistics provides projections at the state and county levels. In Gila County there are more deaths than births projected through 2030 (Figure 2). Net migration makes up for some of the population loss, but only until the year 2027 when deaths outpace the combination of births and net migration through 2030, resulting in negative population growth.



**Figure 2 – Gila County Population Components and Population Change (2015-2030)**



Source: Arizona Office of Employment and Population Statistics

Similar data for the Town of Payson is not available, but if Payson follows the general trend of Gila County, then one can assume the potential for negative population growth for Payson, which does not bode well for the community or region.

## Age and Ethnicity

### Age Breakdown

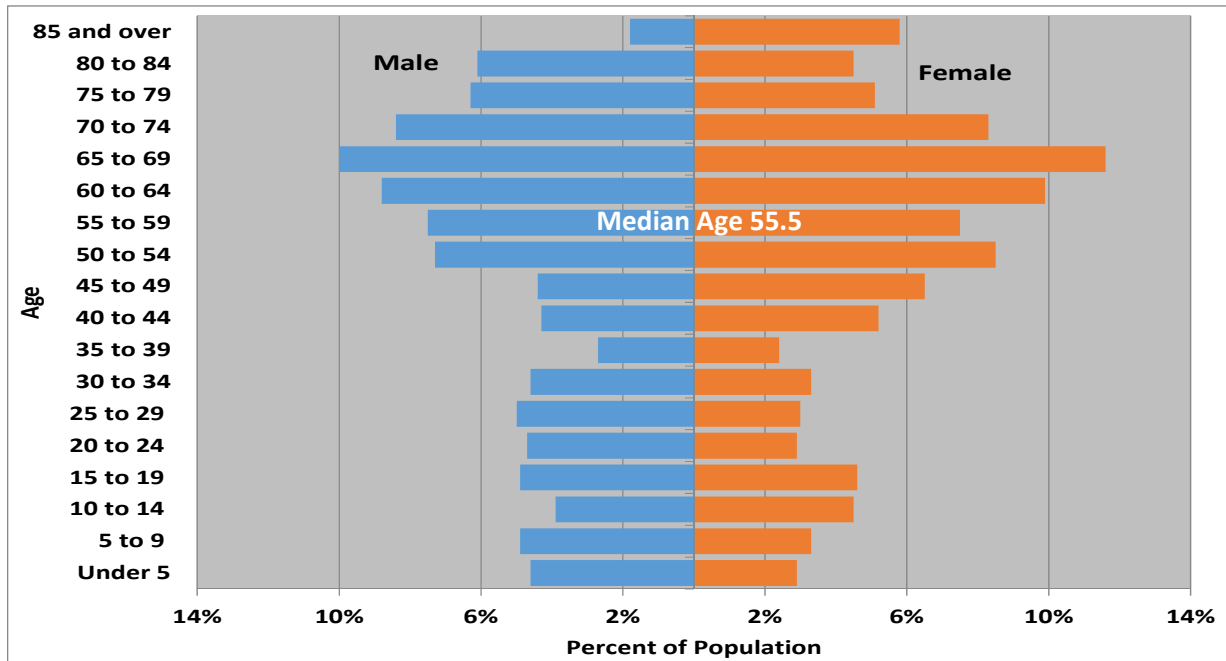
As noted in Figure 3, the median age of Payson residents is 55.5 years of age, which is higher than the county at 48.0 and significantly higher than the median age for the state as a whole at 36.5. The percent of Payson’s prime working age population, between the ages of 25 and 54, is only 28.6 percent, compared to Arizona at nearly 46 percent. To compound the problem of a smaller working age population, Payson also has a significantly smaller cohort of people under the age of 24 to eventually enter the workforce, as noted in Table 3.

**Table 3 – Age Cohort Comparison, Payson and Arizona**

	Payson	Arizona
Under the age of 24	20.5%	34.6%
Prime Working Years 25-54	28.6%	45.9%

Source: US Census 2010-14 ACS

Figure 3 – Town of Payson Age Cohorts by Gender



Source: US Census 2014 ACS

### Race and Ethnicity

Table 4 provides a detailed breakdown of population by race and ethnicity comparing Payson with Gila County and the State of Arizona. The vast majority of Payson’s population is white at nearly 95 percent, which is higher than the county and the state who are at 79 percent. Based on the U.S. Census data, only 9 percent of the Payson population identify themselves of Hispanic origin compared to Gila County at 18 percent and the state at 30 percent.

Table 4 – Town of Payson Race and Ethnicity

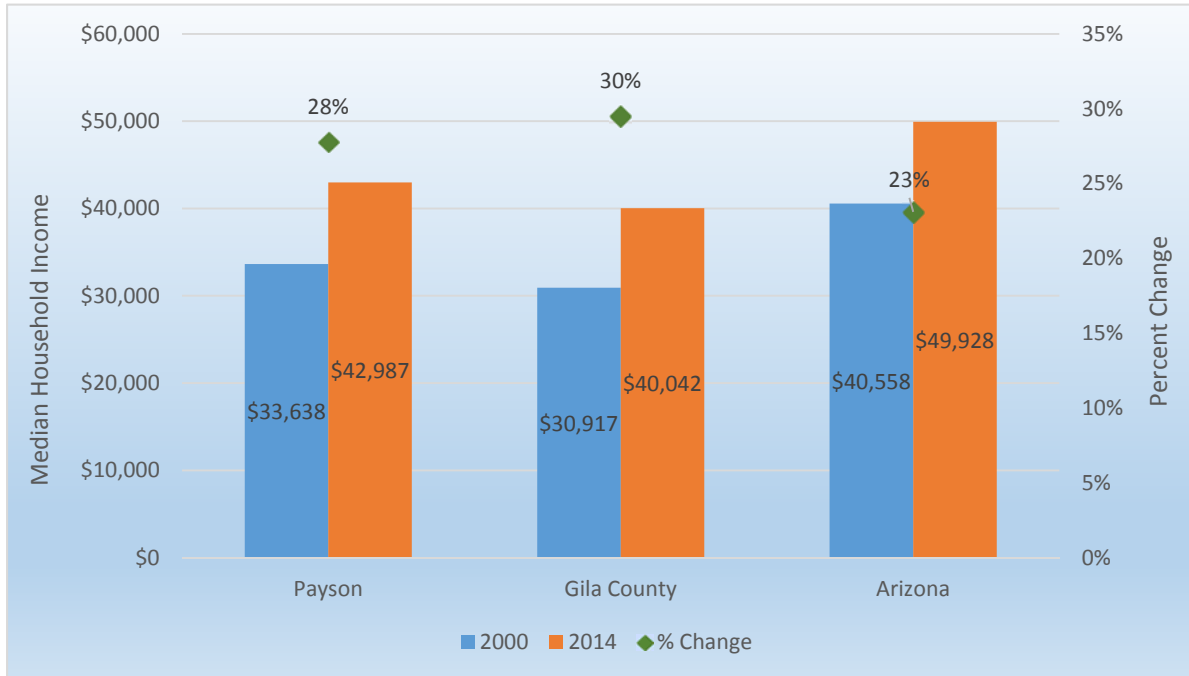
	Payson	Gila County	Arizona
<b>Race</b>			
Total Population	15,234	53,242	6,561,516
White	94.7%	79.2%	78.9%
Black or African American	0.2%	0.6%	4.2%
American Indian and Alaska Native	2.2%	14.8%	4.4%
Asian	0.2%	0.6%	2.9%
Native Hawaiian and Other Pacific Islander	0.0%	0.0%	0.2%
Some Other Race	1.8%	2.4%	6.4%
Two or More Races	0.8%	2.3%	3.1%
<b>Ethnicity</b>			
Hispanic	9.0%	18.4%	30.1%

Source: U.S. Census, ACS 2010-14

## Income

Median household income is an indicator of wealth in a community. The higher the income the more discretionary spending that takes place, which drives the demand for goods and services. The median household income in Payson increased 28 percent since the year 2000 from \$33,683 to \$42,987. Payson residents have a slightly higher income than all of Gila County, but fall behind the State, whose median household income is nearly \$50,000.

Figure 4 – Median Household Income

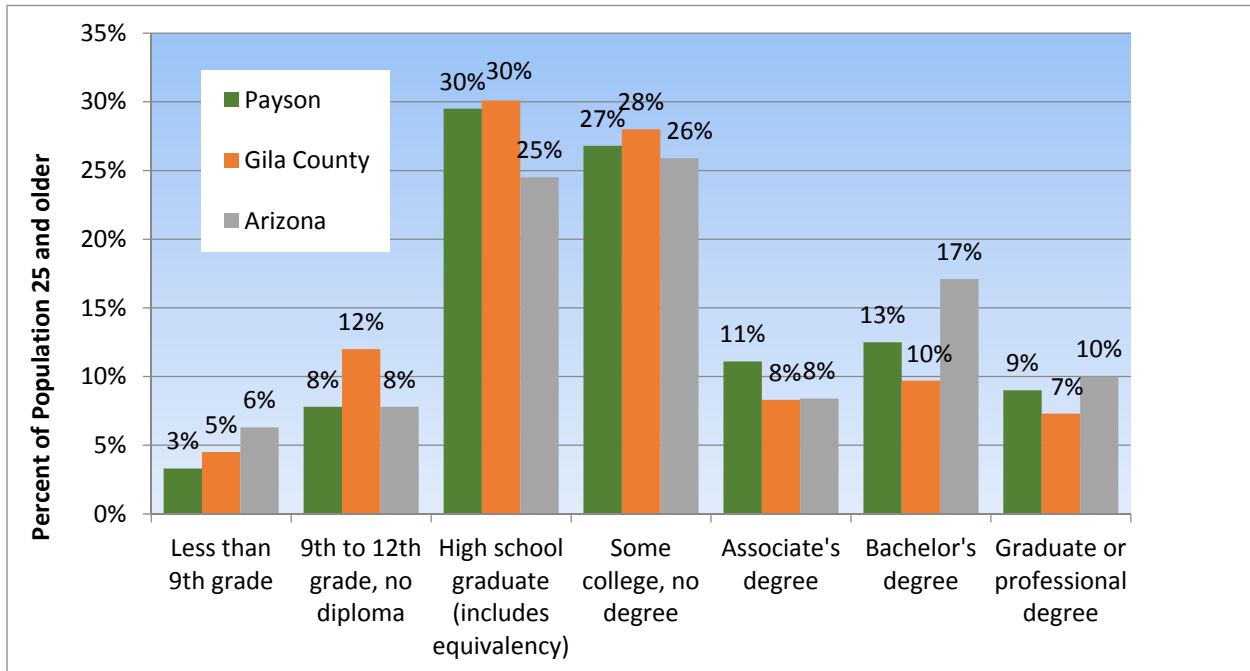


Source: U.S. Census Bureau, Census 2000 Summary File 3; ACS 2010-14

## Educational Attainment

Payson residents possess higher educational attainment than all of Gila County, but lag the state of Arizona. Nearly 22 percent of Payson residents have earned a Bachelor's Degree or higher, compared to the county at 17 percent and the state at 27 percent, presented in Figure 5.

**Figure 5 – Highest Level of Educational Attainment**



Source: US Census, ACS 2014

## Labor Force and Employment

The civilian labor force in Payson is represented by the population 16 years and older and amounts to 5,744 people. The labor force has grown slightly faster than the rate of population growth for Payson over the last 14 years. Gila County’s growth has increased at about the same pace, but both areas trail the state as a whole with a 30.3 percent increase or a 1.9 percent compounded annualized growth rate.

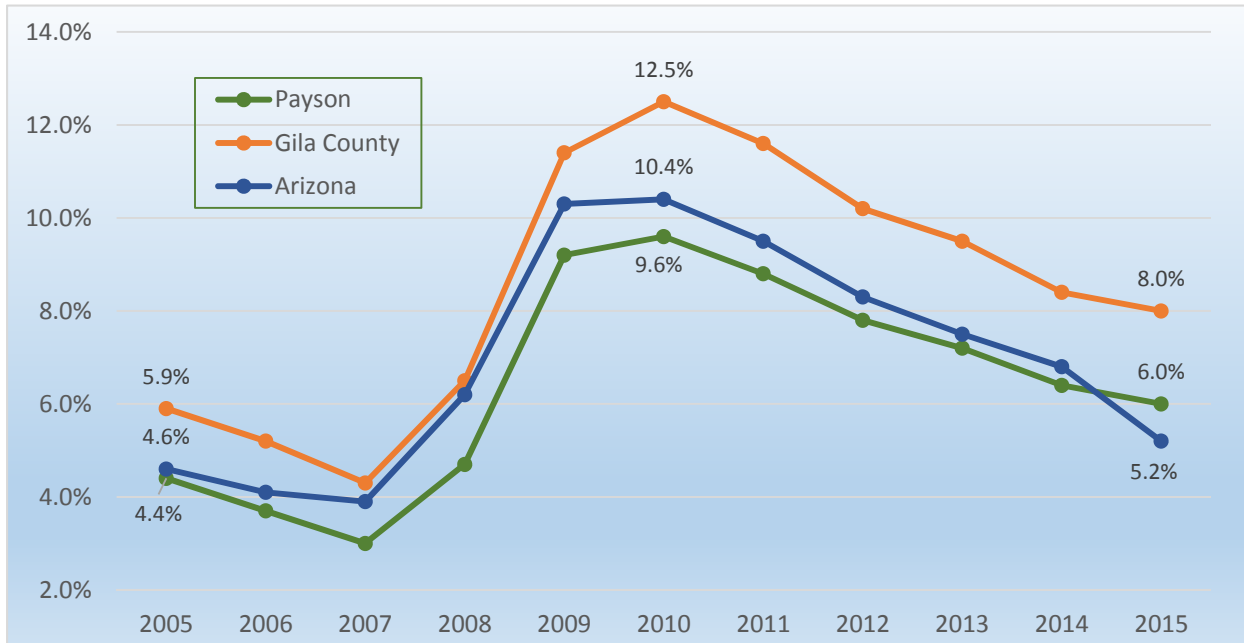
**Table 5 – Civilian Labor Force 16 Years and Older**

	2000	2014	Growth Rate 2000-14	CAGR
Payson	5,574	5,744	3.05%	0.21%
Gila County	19,981	20,667	3.43%	0.24%
Arizona	2,347,740	3,059,049	30.30%	1.91%

Source: U.S. Census Bureau, Census 2000, Special Tabulation; ACS 2010-14

Another measure of economic health in a community is the unemployment rate. Since the year 2005 Payson’s unemployment rate has been below the County and State with one exception in 2015. Peak unemployment for Payson occurred in 2010 at 9.6 percent and has declined to 6.0 percent, but has not achieved the lowest unemployment level attained in 2007 at 3.0 percent.

**Figure 6 – Unemployment Rates, 2005-2015**



Source: Arizona Unemployment Statistics Program

### Employment by Industry and Occupation

Payson has an employed civilian labor force of 5,233 people, with employment highly concentrated in Educational Services and Health Care at 30.7 percent followed by Arts, Entertainment and Retail Trade for a combined 22.8 percent. When comparing the mix of employment to the county and state, Payson has a higher concentration in construction and Educational Services and Health Care. The Town lags the State in higher wage jobs in Manufacturing and Professional and Technical Services.

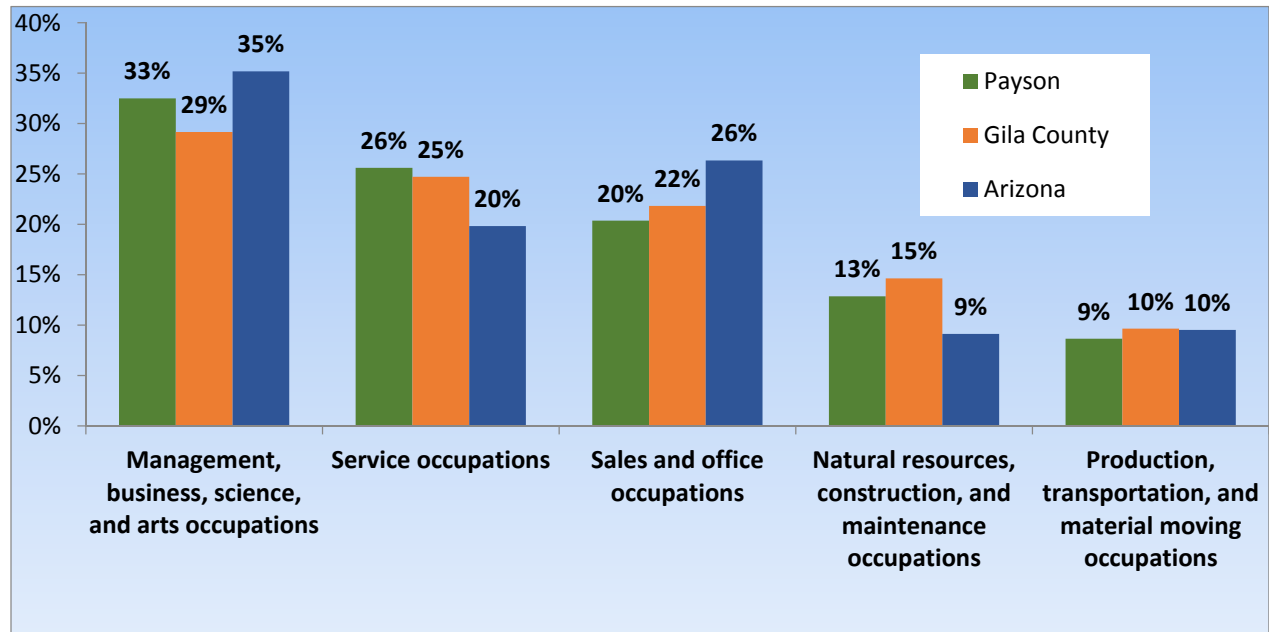
**Table 6 – Employment by Industry, Payson, Gila County and Arizona**

Industry	Payson	Gila County	Arizona
Agriculture, forestry, fishing, hunting, & mining	5.3%	9.3%	1.6%
Construction	9.6%	7.6%	6.6%
Manufacturing	4.1%	2.8%	7.3%
Wholesale trade	1.0%	1.1%	2.4%
Retail trade	10.8%	12.0%	12.3%
Transportation & warehousing, & utilities	4.1%	4.6%	4.9%
Information	0.5%	0.8%	1.8%
Finance, insurance, real estate & rental & leasing	5.0%	4.1%	8.0%
Prof scientific, management, admin, waste management services	7.3%	7.1%	11.7%
Educational services & health care & social assistance	30.7%	25.4%	22.3%
Arts, entertainment, & recreation, & accomm. & food services	12.1%	13.3%	10.8%
Other services, except public administration	3.4%	4.4%	4.8%
Public administration	6.2%	7.5%	5.7%

Source: ACS 2014

One-third of residents are employed in Management occupations which includes computer, engineering, education and healthcare. Another 26 percent are in Service occupations which includes protective service, food preparation and healthcare support.

Figure 7 – Occupations



Source: ACS 2014

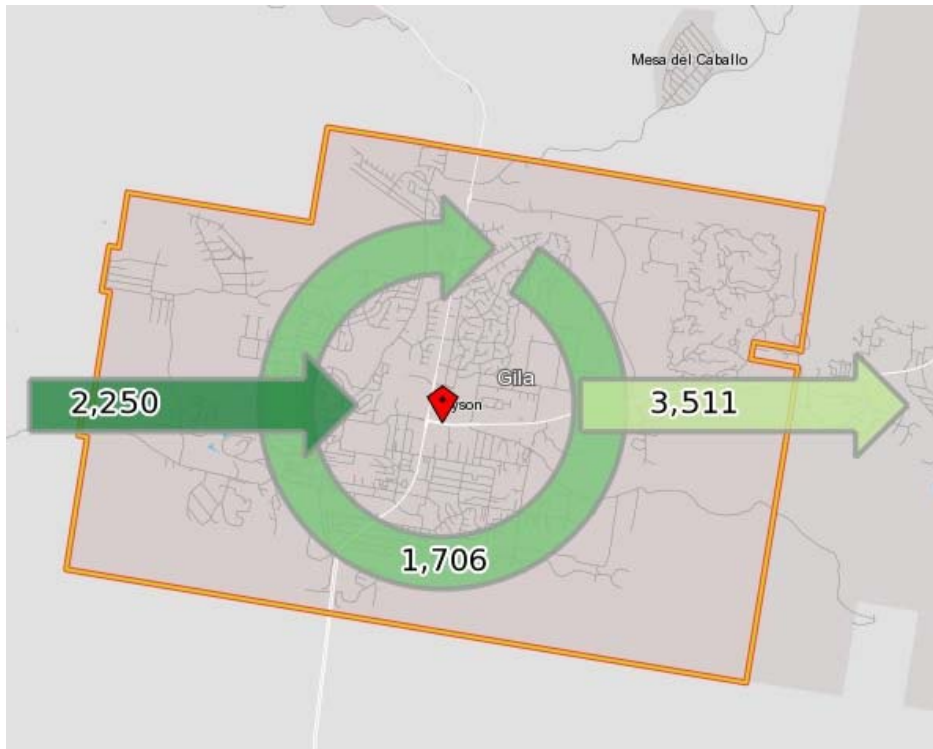
### Worker Inflow-Outflow

According to the U.S. Census origin destination data, 67.3 percent of Payson’s residents out-commute to jobs in other cities. Of the 5,270 jobs in Payson, 56.9 percent are filled by in-commuters; people who don’t live in Payson but commute into the Town to work. Another 1,706 both live and work in Payson as denoted in Figure 8.<sup>1</sup>

By comparing the workforce characteristics of the worker inflow and outflow (Table 7) of the 35 percent of residents that both live and work in Payson, 82 percent are employed in service industry class jobs making \$1,250 or less per month. At the same time, 29 percent are out-commuting to jobs that pay higher wages at more than \$3,333 a month. Of the out-commuters 11 percent are employed in goods producing jobs. When it comes to non-residents, 31 percent in-commute to jobs in trade and utilities.

<sup>1</sup> The US Census LEHD Origin-Destination Employment Statistics will not match the ACS 2014 employment data.

**Figure 8 – Payson Worker Inflow-Outflow**



**Table 7 – Payson In-Flow Outflow Worker Characteristics, 2014**

	Residents that Out-Commute		Non-Residents that In-Commute		Residents that Work In Payson	
	Count	Percent	Count	Percent	Count	Percent
<b>Total All Jobs</b>	3,629	100%	2,250	100%	1,706	100%
<b>Jobs by Worker Age</b>						
Age 29 or younger	677	19%	513	23%	335	20%
Age 30 to 54	1,726	49%	1,102	49%	830	49%
Age 55 or older	1,108	32%	635	28%	541	32%
<b>Jobs by Earnings</b>						
\$1,250 per month or less	1,016	29%	769	34%	603	35%
\$1,251 to \$3,333 per month	1,476	42%	954	42%	661	39%
More than \$3,333 per month	1,019	29%	527	23%	442	26%
<b>Jobs by Sector</b>						
Goods Producing Industry Class	381	11%	153	7%	117	7%
Trade, Transportation, and Utilities Industry Class	908	26%	707	31%	182	11%
All Other Services Industry Class	2,222	63%	1,390	62%	1,407	82%

Source: U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics

As previously mentioned, 67 percent of Payson residents out-commute to jobs in other cities, and nearly 59 percent of the jobs are filled by nonresidents who commute into Payson for work. As noted in Table 8,

33 percent of Payson residents work in Payson, however 38 percent commute to work in the Phoenix Metro area.

**Table 8 – Payson Location of Employment/Residence 2014**

	Where Payson Residents Work		Where Workers are Coming From	
	Count	Percent	Count	Percent
<b>Total Count</b>	<b>5,217</b>	<b>100.0%</b>	<b>3,956</b>	<b>100.0%</b>
Payson town, AZ	1,706	32.7%	1,706	43.1%
Phoenix city, AZ	924	17.7%	198	5.0%
Mesa city, AZ	241	4.6%	98	2.5%
Scottsdale city, AZ	231	4.4%	62	1.6%
Tempe city, AZ	220	4.2%	24	0.6%
Tucson city, AZ	124	2.4%	24	0.6%
Chandler city, AZ	115	2.2%	26	0.7%
Globe city, AZ	115	2.2%	11	0.3%
Star Valley town, AZ	106	2.0%	277	7.0%
Tonto Village CDP, AZ	78	1.5%	24	0.6%
Glendale city, AZ	67	1.3%	30	0.8%
Thatcher town, AZ	61	1.2%	7	0.2%
Pine CDP, AZ	57	1.1%	9	0.2%
Gilbert town, AZ	54	1.0%	28	0.7%
Peoria city, AZ	52	1.0%	24	0.6%
Casa Grande city, AZ	47	0.9%	26	0.7%
Surprise city, AZ	34	0.7%	0	--
Yuma city, AZ	22	0.4%	13	0.3%
Morenci CDP, AZ	19	0.4%	3	0.1%
Flagstaff city, AZ	18	0.3%	60	1.5%
Goodyear city, AZ	16	0.3%	16	0.4%
Coolidge city, AZ	15	0.3%	4	0.1%
Show Low city, AZ	15	0.3%	0	--
Catalina Foothills CDP, AZ	14	0.3%	0	--
Apache Junction city, AZ	12	0.2%	23	0.6%
Mesa del Caballo CDP, AZ	0	--	77	1.9%
Round Valley CDP, AZ	0	--	54	1.4%
San Tan Valley CDP, AZ	0	--	41	1.0%
Oxbow Estates CDP, AZ	0	--	36	0.9%
Prescott Valley town, AZ	0	--	34	0.9%
San Carlos CDP, AZ	0	--	33	0.8%
Gisela CDP, AZ	0	--	26	0.7%
Young CDP, AZ	0	--	25	0.6%
Lake Havasu City city, AZ	0	--	24	0.6%
All Other Locations	854	16.4%	913	23.1%

Source: U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics



# 2. Competitive Assessment

An analysis of Payson’s competitiveness was conducted to gain an understanding of the Strengths, Weaknesses, Opportunities, and Threats (SWOT). This analysis included input from staff, interviews with Town Council members, and key community stakeholders. In addition, an examination of other relevant Town documents, data and reports was undertaken. The following table is a summary of the key SWOT findings. The comprehensive SWOT assessment is included within Appendix A.

**Table 9 – Key SWOT Findings**

Strengths	Weaknesses	Opportunities	Threats
<ul style="list-style-type: none"> <li>•Natural environment</li> <li>•Small town feel, friendly and good family environment</li> <li>•Proximity to outdoor recreation such as hiking, biking, hunting, fishing, and camping</li> <li>•Green Valley Park</li> <li>•Existing trail system and potential expansion</li> <li>•Tourism attraction program</li> <li>•IDA with ability to bond</li> <li>•Capacity in the treatment facility</li> <li>•C.C. Cragin pipeline</li> <li>•Progressive minded elected officials</li> <li>•Proximity to Phoenix</li> </ul>	<ul style="list-style-type: none"> <li>•Limited employment opportunities</li> <li>•Lack of a skilled workforce</li> <li>•Exodus of youth for higher education or job opportunities</li> <li>•Impact fee structure that impedes development</li> <li>•High land and development costs</li> <li>•Economy highly reliant on tourism</li> <li>•No discernable downtown</li> <li>•No identifying gateway into Payson</li> <li>•Lack of diversity and quality in retail and restaurant offerings</li> <li>•Limited quality jobs for the trailing spouse</li> <li>•Inadequate funding or dedicated tax for economic development</li> </ul>	<ul style="list-style-type: none"> <li>•Restore and/or repurpose older buildings on Main Street</li> <li>•High density housing in downtown</li> <li>•Pedestrian friendly downtown with a mix of retail and restaurants that people desire</li> <li>•American Gulch Project and potential trail or boardwalk</li> <li>•Development of the University Campus and the capture spinoff activity</li> <li>•Position Payson to compete with other outdoor recreational mecca's</li> <li>•Attraction of a resort/conference center</li> <li>•Complete improvements at the multi-event center</li> <li>•Development of a Multi-generational recreational center</li> <li>•Attraction of light manufacturing</li> </ul>	<ul style="list-style-type: none"> <li>•Increasing traffic congestion along SR 87 connecting to SR 260</li> <li>•Drug problem among youth and workforce</li> <li>•Resistance to change and maintaining the status quo</li> <li>•Conflicting desires of younger versus older generation</li> <li>•Anti-growth sentiment</li> <li>•Market competition</li> <li>•Escalating land and housing prices</li> <li>•Aging population and the potential demand for specialized programs/services</li> <li>•Growth of on-line retailing</li> <li>•Waiting for the development of University and not moving ahead with other key initiatives</li> <li>•Wildfires</li> </ul>

## Talent

Competitive economies require a workforce that has the necessary educational attainment and technical skills. Human resources is widely recognized as being key to successful economic development and are the primary ways by which the human capital of a region is preserved and enhanced. Building a sustainable

economy requires both educating people and ensuring that jobs are available that reward their investment in education. The local labor market and skills development are assessed in terms of workforce skill levels and production of graduates. Measuring these systems includes:

- Preparation (K-12)
- Advancement (college and university)
- Skills enhancement (continuing education and retraining)

Payson has both charter and non-charter K-12 schools for parents to choose from. In the near future the Arizona Leadership Academy, a K-8 charter school, will locate in Payson complementing the existing school system.

### **Educational Achievement**

An assessment of how well schools perform in preparing students for the workforce or for continuing education is in part founded in school test scores. As a gauge of student proficiency, Arizona has conducted the Arizona's Instrument to Measure Standards (AIMS) to assess academic content standards in writing, reading, mathematics and science. Going forward the State will replace AIMS with Arizona's Measurement of Educational Readiness to Inform Teaching (AzMERIT), which will test for knowledge under the new standards. It will also be a computer based test with the goal of measuring critical thinking skills for college and career readiness.

Test scores for schools located in Payson for the 6th, 8th and 10th grades were compared to the overall state score for each respective grade and is presented in Table 10. When comparing Payson school test scores against the State as a whole, overall Payson students lag behind their counterparts.

In 2011 Arizona State Board of Education adopted the A-F Letter Grade accountability system. The purpose of the A-F Letter Grades were designed to place equal value on current year achievement and longitudinal academic growth, specifically the growth of all students as well as a school's lowest achieving students. Going forward, Senate Bill 1289, adopted during the 2015 legislative session, will prohibit A-F letter grades for school years 2014-15 and 2015-16, but require the Department of Education to continue to identify schools with "below average levels of performance," defined as schools that formerly had a "D" grade.

When looking at schools in Payson, the school grade, noted in Table 10, represents the level of performance. A "B" score indicates that the school demonstrated an above average level of performance and that 60 percent of their students passed AIMS and AIMS A, while a "C" score demonstrates an average level of performance with about half of students passing AIMS and AIMS A. According to the Arizona Department of Education 33 percent of schools have a "B" score and 27 percent have a "C" score.

**Table 10 – Arizona’s Instrument to Measure Standards (AIMS) Results, Fiscal Year 2014**

	<b>Mean Math Score</b>	<b>Mean Reading Score</b>	<b>Mean Writing Score</b>	<b>Mean Science Score</b>	<b>School Grade</b>
<b>State Score (6th Grade)</b>	<b>408</b>	<b>509</b>	<b>501</b>	<b>*</b>	<b>n/a</b>
Julia Randall Elementary	371	475	491	518	B
<b>State Score (8th Grade)</b>	<b>435</b>	<b>518</b>	<b>487</b>	<b>511</b>	<b>n/a</b>
Rim Country Middle School	417	514	495	505	C
<b>State Score (10th Grade)</b>	<b>497</b>	<b>713</b>	<b>507</b>	<b>478</b>	<b>n/a</b>
Payson High School	478	698	500	484	C
Payson Education Center (9-12)	478	696	473	*	*
Payson Center for Success (9-12 Charter)	496	712	493	*	C
The Shelby School (K-10 Charter)	393	485	487	*	B

Source: Arizona Department of Education, 2014 AIMS Results

### Higher Education

Higher educational offerings are provided by Gila Community College (GCC), a provisional community college who has contracted with Eastern Arizona College for academic services. Students attending GCC receive college credit from Eastern Arizona College. GCC offers both degree and certificate programs in a wide variety of curriculum programs.

Over the last several years community leaders in the region have been working on the siting of a four-year university campus in Payson. The Alliance, formerly the Rim Country Education Foundation (RCEF) was established by the Towns of Payson and Star Valley to facilitate the project. Funding was given to the RCEF by the MHA Foundation to acquire land from the U.S. Forest Service for the university campus. The vision is to facilitate higher education and workforce development by creating a university campus with multiple universities on 253 acres of land. It is anticipated that classes will commence Fall of 2018 offering a variety of academic programs.

### Career Technical Education

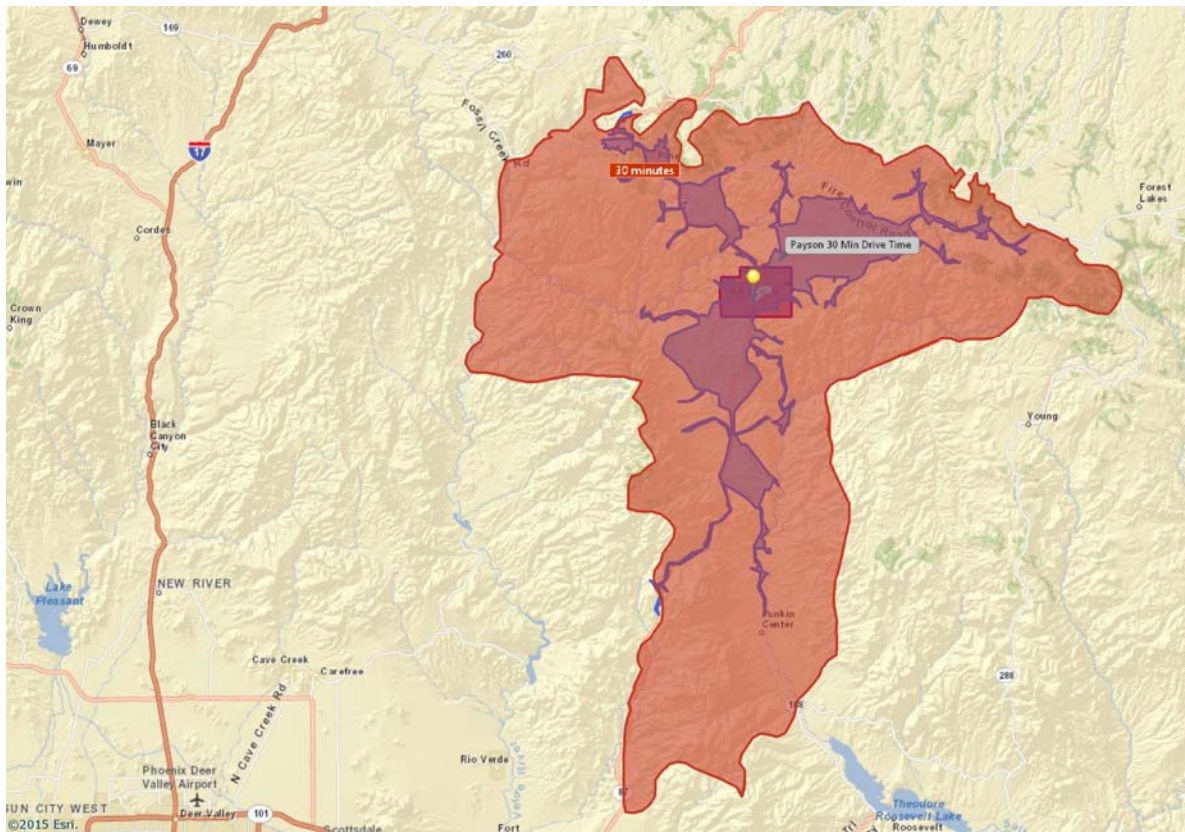
GCC partners with the Northern Arizona Vocational Institute of Technology (NAVIT) and the Cobre Valley institute of Technology (CVIT) for career and technical educations programs. Payson students have access to these programs and can earn college credit. Career technical education provides students with the ability to earn industry certification, college credit and internship opportunities. Often times these programs are supported by business and industry, equipping students with relevant skills and working industry knowledge, propelling the in their future careers and higher education endeavors.

## Market Trade Area

The market trade area for Payson was determined based on a combination of the geographic expanse of a 30 minute drive time, combined with the geographic concentration of jobs. For the purposes of this

strategic plan, the Payson trade area encompasses three zip codes: 85541, 85544, and 85553 and is depicted in Figure 9.

**Figure 9 – Payson Market Trade Area and 30 Minute Drive Time**



Source: Esri, 2014

Payson comprises 57 percent of the population within the market trade and has a slightly younger median age at 55.5 compared to 56.9 years of age. However, when it comes to total number of business establishments, Payson is the employment center for the trade area with 72 percent of all business establishments and 84 percent of the employees.

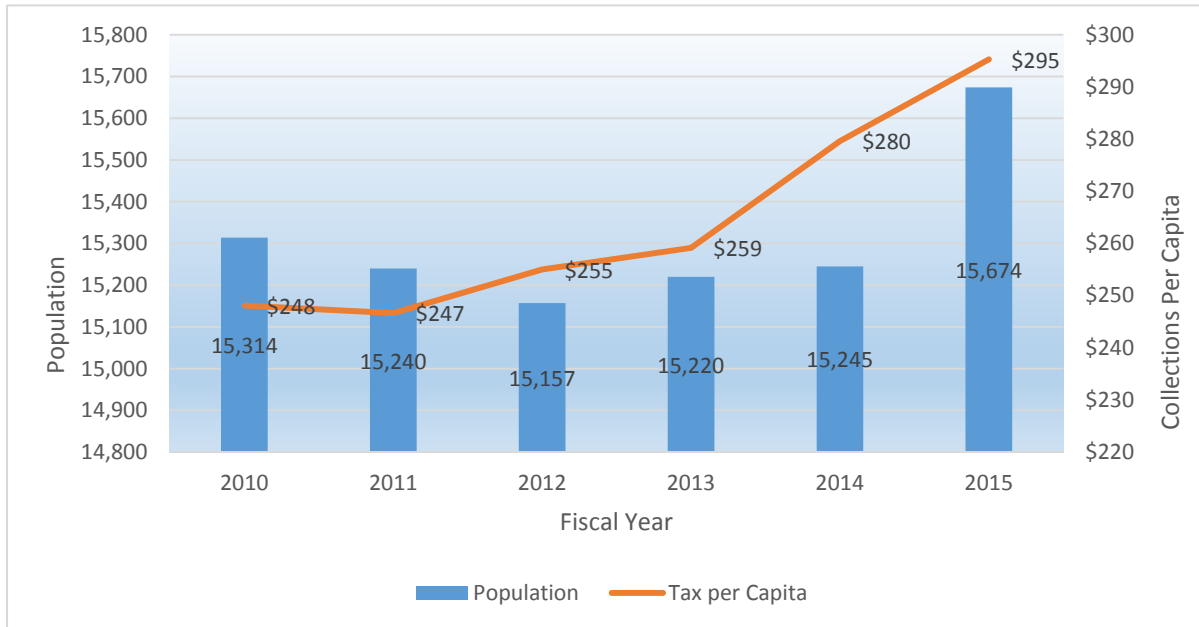
**Table 11 – Demographic Comparison Payson, 30 Minute Drive Time and Market Trade Area**

	Payson	30 Minute	Trade Area	% of 30 Minute Drive Time	% of Trade Area
Total Population	15,674	21,327	27,502	73.5%	57.0%
Median Household Income	\$42,987	\$44,283	\$43,794	97.1%	98.2%
Median Age	55.5	56.3	56.9	--	--
Average Household Size	2.25	2.12	2.10	--	--
Total Businesses	1,005	1,230	1,393	81.7%	72.1%
Total Employees	8,578	9,484	10,205	90.4%	84.1%

Source: Esri, 2014

When examining the sales tax collections for the Town of Payson over a five year period, the tax collected on a per capita basis has increased from \$248 to \$295. This does not include hotel/motel tax collections.

**Figure 10 – Payson Sales Tax Collections Per Capita, 2010-2015**



Source: U.S. Census, Population Division. Annual Estimates of the Resident Population: April 1, 2010 to July 2014; CAG 2015; Town of Payson

Every community has a certain amount of retail trade leakage or surplus. Payson sales are greater than what Payson residents alone can generate, therefore Payson has a surplus, which implies that sales are being created by customers coming from outside the Town. Table 12 shows the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a 'surplus' of retail sales, a market where customers are drawn in from outside the Town. The Leakage/Surplus represents the difference between retail potential and retail sales.

**Table 12 – Town of Payson Leakage/Surplus Factor**

	Retail Demand	Retail Sales	Leakage/Surplus Factor
Total Retail Trade and Food & Drink	\$234,973,855	\$336,358,568	-17.7
Total Retail Trade	\$213,570,662	\$287,718,600	-14.8
Total Food & Drink	\$21,403,193	\$48,639,968	-38.9

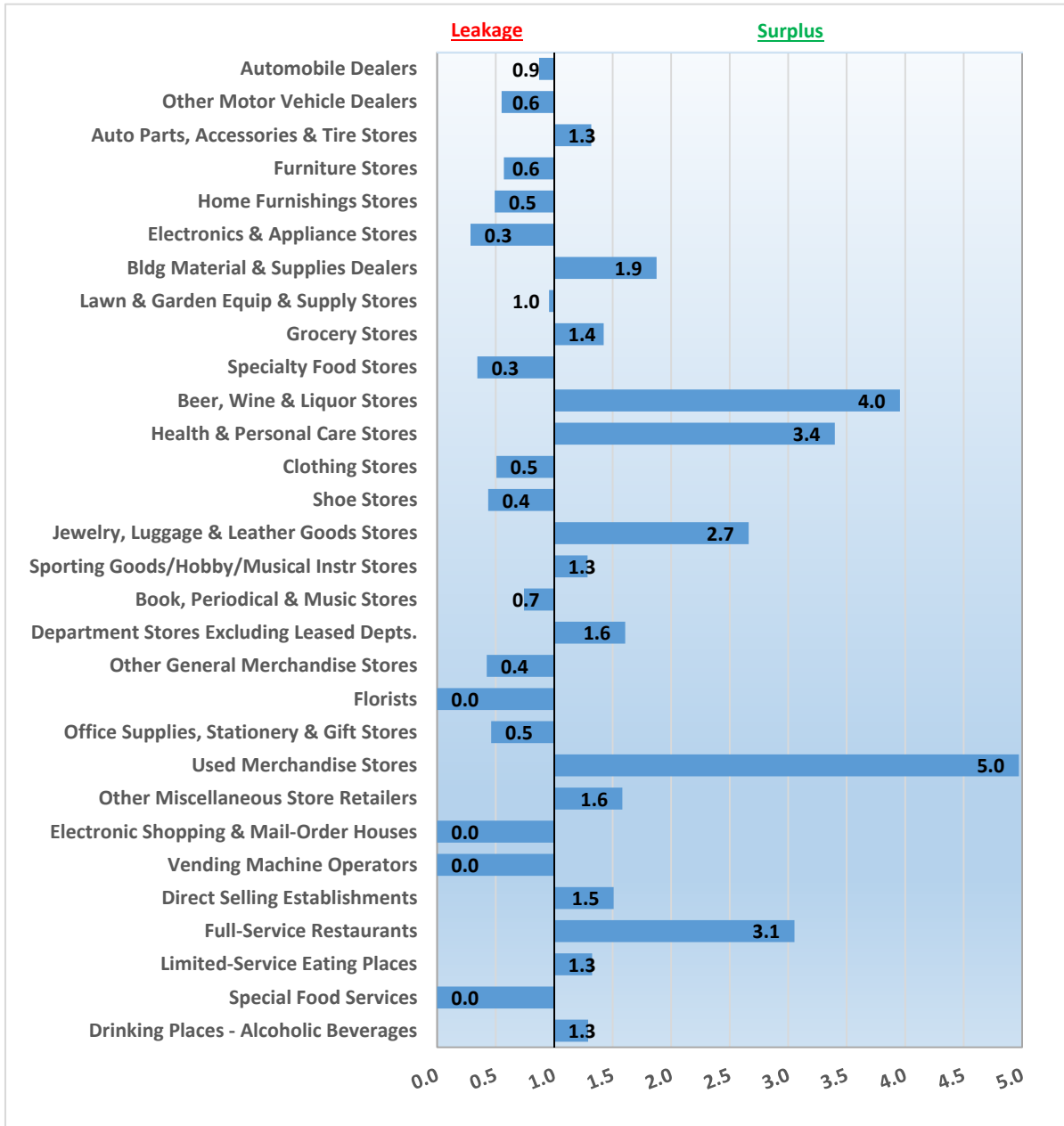
Source: Esri 2015

Figure 11 converts the leakage/surplus factor into an index that shows which industry groups are experiencing either a leakage or a surplus. Payson has trade leakage in many categories including auto dealers, furniture stores, home furnishings, electronics and appliance stores, clothing and shoes. At the

same time Payson experiences surplus in sales in beer and wine stores, health and personal care stores, used merchandise stores and full service restaurants.

Leakage/Surplus provides a relative comparison of the supply and demand across retail product categories. Equilibrium equals 1.0, less than 1.0 means that out-shopping is taking place, and greater than 1.0 means that you are attracting trade from outside the trade area. Factors that influence whether you can attract specific type of retail includes existing competition, and the size and demographics of your market.

**Figure 11 – Town of Payson Retail Leakage/Surplus Index**



Source: Esri, 2015

## *Infrastructure*

### *Water and Sewer*

The Town of Payson operates the Town's water supply by providing treatment and distribution to approximately 16,000 people within a 19.5 square mile area. The water system includes 40 active production wells, over 8 million gallons of storage capacity, over 180 miles of distribution lines, booster-pumping stations, and water treatment facilities. The Town also has a cooperative water reclamation project with Northern Gila County Sanitation District for the recharge of water stored in the Green Valley Park Lakes.

Currently the Town derives all of its water supply from groundwater, but in the future the water supply will be supplemented by the C.C. Cragin Water Project. The Town partnered with the Salt River Project (SRP) to construct the C.C. Cragin Water Project, which will ensure a sustainable water supply for future generations to come. The Town is currently constructing 14.5 mile pipeline along East Houston Mesa Road from Washington Park to Payson, and will also be constructing a water treatment plant for the delivery of treated water. At present, completion of this project is anticipated between 2017 and 2020.

Sewer service is provided by the Northern Gila County Sanitary District for the treatment of waste and distribution of treated effluent. They are completing an upgrade and major expansion of the system which will provide capacity of 3.5 million gallons a day, which is sufficient to accommodate future growth.

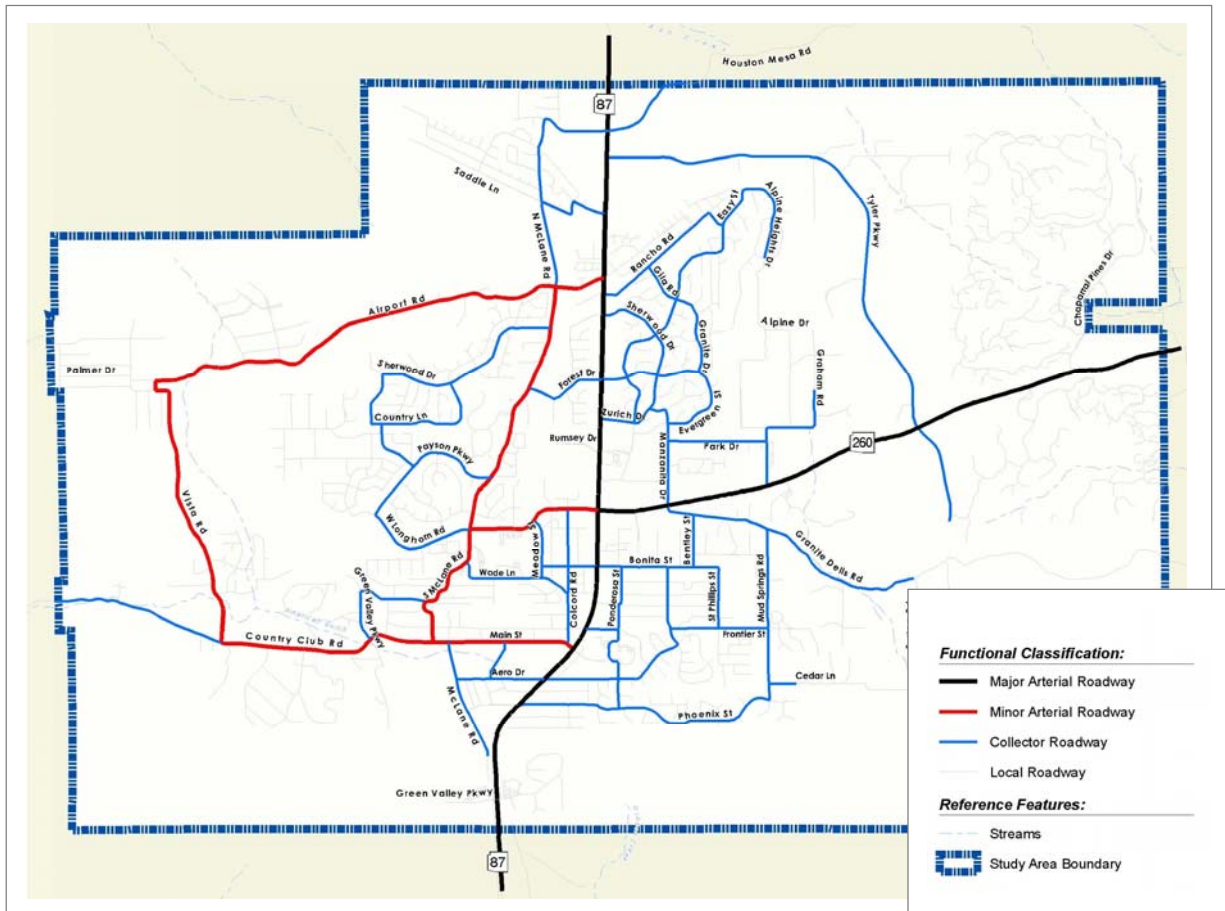
### *Broadband*

Business rely on broadband not just for email and web browsing, but for VoIP phone systems, analyzing data and serving up social media platforms. Businesses require high speed and reliable internet to compete with other businesses on a national and global scale and to expand into e-commerce.

Presently the Town of Payson has inadequate broadband service and also lacks redundancy in the existing system. The Town is currently serviced by two internet service providers: Century Link and SuddenLink. Over the last year the Town suffered three major internet outages that lasted upwards of 8 hours. This affected public safety and resulted in the loss of business to area merchants who were unable to process debit and credit card transactions. The Town leaders are actively working with their telecommunication partners to identify solutions and funding that would extend the fiber link from Forest Lakes to Payson, and possibly add a secondary trunk line from Rye to Fountain Hills.

## Streets and Roads

State Route 87, also known as the Beeline Highway, is the primary north-south route connecting Payson to Phoenix. This road is a 4-lane highway going through the Town and connects to State Route 260, which runs east and west. These two roads facilitate the movement of goods and customers and are the primary commercial corridors for the Town.



According to ADOT the annual average daily traffic (AADT) volume in 2014 on SR87 from Main Street to the intersection of Longhorn/SR260 is 23,372 vehicles; and from Longhorn/SR260 to Houston Mesa Road the AADT is 18,489. The count from SR260 to Granite Dells Road is 19,710 AADT.

The 2011 Payson Transportation Study conducted by ADOT in conjunction with the Town of Payson indicated that these two commercial corridors will become highly congested in the future thereby compromising safety and the ability to circulate traffic. This congestion could have a detrimental effect on economic development by stymying tourist activity, especially during the peak summer season, and discouraging new business from locating in Payson. Several improvements were recommended in the study including roadway, pedestrian, and bicycle improvements and a potential alternative corridor to help reduce traffic congestion on SR87 and SR260.

The Town has also identified road segments and intersections in need of improvements that would improve circulation and relieve congestion on SR87 and SR 260.



## *Airport*

The Payson Airport is located on 123 acres west of SR87 off of Airport Road. It has a single asphalt runway 5,500 feet long by 75 feet wide to accommodate small aircraft, a helipad 50 feet by 50 feet, and medium intensity runway and taxiway lights. While there is no dedicated airport terminal building, services do include a waiting lobby, pilot lounge area, and restroom facilities, which are operated by the Fixed Based Operator (FBO). Also on site is a restaurant. In addition there are hangar facilities comprised of T-hangars, linear box hangars and one conventional hangar.

The land surrounding the airport is a mix of residential and industrial land uses. Located west of the airport is the Sky Park Industrial Park, which has several aviation and non-aviation industrial and commercially related businesses that have taxiway access to the airport. On the southwest side of the airport are 13 undeveloped acres zoned for employment uses. Northwest of the airport is the Mazatzal Mountain Residential Airpark, in which residents have access to the runway. Land to the north and east of the airport is undeveloped and currently not serviced by utilities.

The employment land uses at the airport represent the best opportunity for attracting manufacturing operations. However the lack of utilities and access present problems that will have to be overcome.

## *Sites and Buildings*

One of Payson's greatest weakness is the lack of fully serviced sites and existing buildings that meet the needs of existing companies who would like to expand, or new business who would like to locate in the Town. The Payson Industrial Park is nearly built out and the majority of the industrially zoned land around the airport is not shovel ready. Prioritizing capital improvements that will maximize the ability to generate jobs is an important first step to facilitate economic development.

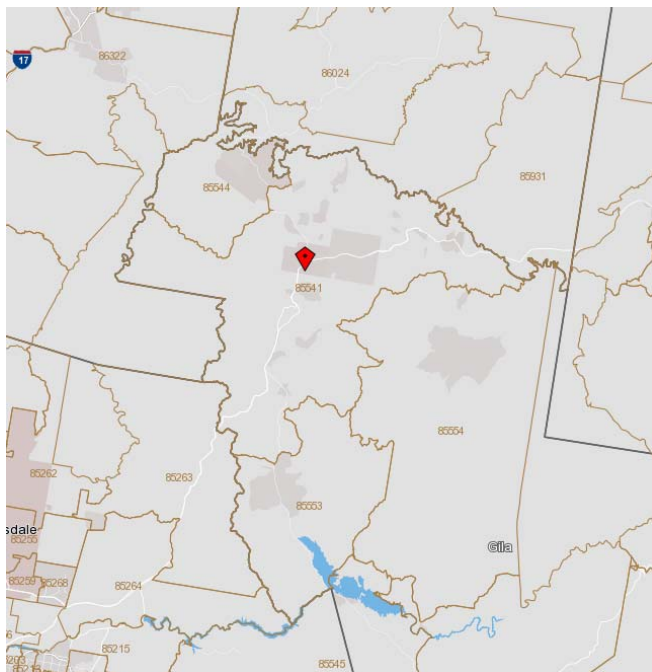
To be competitive the Town should collaborate with the local real estate brokerage community and prepare and maintain a comprehensive inventory of available sites and buildings. This inventory should be posted on the Town's web site so that site selectors, local business and other interested parties can access the information. Sites that are certified by the ACA can be posted on ACA's website.

# 3. Industry Targets

This cluster analysis begins by exploring existing industry sectors in the Payson region to understand employment concentration and growth of the sector over the last few years. The objective is to arrive at a list of recommended industry opportunities for Payson that are future-oriented and growth-oriented, but also reality-based (i.e., they are grounded in the unique assets/advantages that Payson already possesses or can feasibly nurture).

## Methodology

A targeted industry analysis begins with the geographic identification of the study area. Defining the study area for the targeted industry analysis includes examining employment concentration and the in-flow and out-flow commute patterns of the workforce. A total of 3 zip codes in northern Gila County were selected for the study area, which includes 85541, 85544, and 85553. These three zip codes comprise Payson, Star Valley to the east, Strawberry and Pine to the North and Rye to the south.



A database was compiled of business and industry within the study area to gain a deeper understanding of the major industry sectors, as well as their growth, regional concentration, and their importance to the area economy. Several factors are utilized when evaluating the various industry sectors, including the relative employment concentration, known as the location quotient (LQ), the number of jobs linked to each industry sector, employment growth, and change in the LQ (relative concentration of the industry).

Location quotients are used to identify the relative concentration of local employment within a given business sector. For the purpose of this analysis the LQ for the Payson region was examined against Arizona. A total of 503 industries were examined at the six digit NAICS level. A location quotient is computed for each industry, using the following mathematical formula:

$$LQ = \frac{\text{Employment in Industry within Region} / \text{Total Employment within Region}}{\text{Employment in Industry within Arizona} / \text{Total Employment within Arizona}}$$

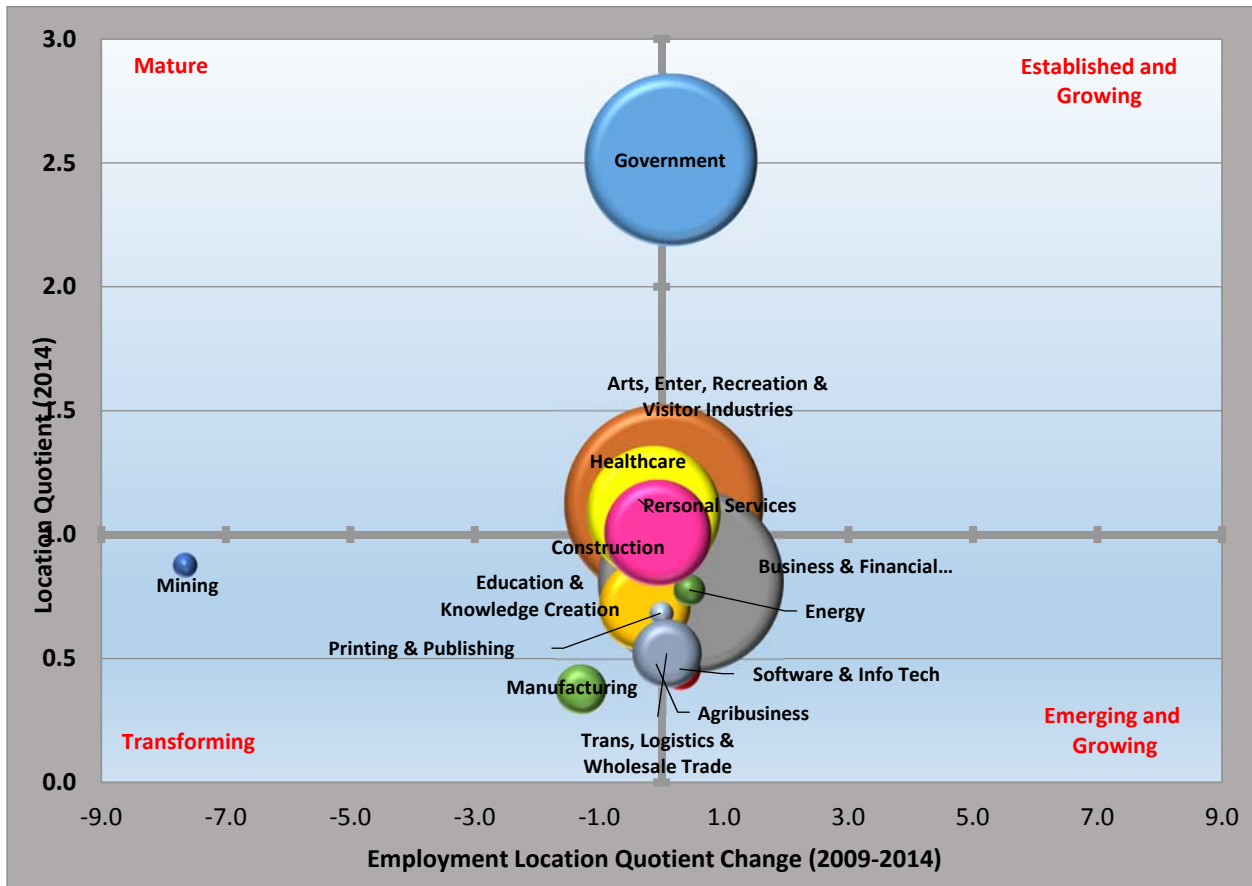
An industry with a LQ equal to 1.0 has the same share of total employment as the industry’s share of Arizona’s employment. If a LQ is greater than 1.0, that signifies that the industry is more concentrated within the economic region than Arizona. Likewise, if a LQ is less than 1.0 that means it is less concentrated than Arizona.

Appendix B contains the master list of industries for the study area categorized within their respective industry cluster. The list includes employment and payroll growth, earnings per employee, and LQ for each industry within the Payson Study Area as compared to Arizona.

When examining the industry sectors within the Payson study area, it is obvious that the Payson has relative strengths in established and growing industries such as Healthcare, Arts, Entertainment Recreation and Visitor Industries, and Business and Financial Services, while also revealing emerging industry sectors such as Software and Information Technology.

Figure 12 helps identify competitive strengths and weaknesses of the various industry sectors within the Payson study area. Bubble size represents relative industry size by number of workers. The vertical axis represents the LQ which shows the relative concentration of that industry to the state as a whole. Anything 1.0 or greater reveals a greater concentration in employment within the Payson study area than the state. The horizontal axis represents change in the LQ from 2009-14. The bubbles right of the vertical axis are driving Payson's growth. Industries above the horizontal axis are more significant to Payson than to the rest of the state.

**Figure 12 – Payson Industry Sector Concentration and Employment Growth**



The four quadrants of Figure 12 illustrates the industry's economic position within the region. Industries with a LQ greater than 1.0 are a major source of employment growth and have a high local concentration.

Each quadrant of the chart tells a story. Established and growing industries that are driving the region's growth are in the upper right corner and include Arts, Entertainment, Recreation and Visitor Industries, Construction, and Government.

Industries in the upper left corner are mature with a strong position but are in a slow growing market, such as Healthcare and Personal Services.

Industries in the lower right corner are not as concentrated relative to the state as a whole, but continue to emerge and contribute to the region's economic base and include Business and Financial Services, Energy, Transportation and Logistics, and Software and Information Technology.

The lower left corner, which includes Manufacturing, Agribusiness, Education and Knowledge Creation, Printing and Publishing, and Mining are in a slow growing market and have experienced a decline in employment over the five year time horizon.

Table 13 provides a snapshot of employment growth and average wages for all defined clusters within the study area, including Government. Overall the study area experienced an 18.7 percent increase in employment over the five year time horizon with an average wage of \$26,625. The largest employment gains were seen in Energy, Software and Information Technology, and Business and Financial Services.

**Table 13 – Employment by Industry Cluster**

	2014 Average Wage	2009 Emp.	2014 Emp.	2014 Percent of Total Emp.	Emp. Growth 2009-2014
<b>Total Payson Region</b>	<b>\$26,625</b>	<b>9,011</b>	<b>10,693</b>	<b>100.0%</b>	<b>18.7%</b>
<b><u>Industry Cluster</u></b>					
Agribusiness	\$13,515	84	100	0.9%	17.9%
Arts, Enter, Rec & Visitor Industries	\$18,735	2,159	2,602	24.3%	20.5%
Business & Financial Services	\$18,655	805	2,258	21.1%	180.4%
Construction	\$22,021	507	572	5.4%	12.9%
Education & Knowledge Creation	\$27,401	679	546	5.1%	-19.6%
Energy	\$49,341	18	65	0.6%	272.0%
Government	\$58,716	1,918	1,964	18.4%	2.4%
Healthcare	\$31,577	996	1,176	11.0%	18.0%
Software & Information Technology	\$21,125	35	110	1.0%	214.7%
Manufacturing	\$63,236	648	164	1.5%	-74.6%
Mining	\$24,788	279	38	0.4%	-86.6%
Personal Services	\$14,581	612	748	7.0%	22.4%
Printing & Publishing	\$23,887	36	37	0.3%	4.2%
Trans, Logistics & Wholesale Trade	\$53,068	234	312	2.9%	33.8%

Source: IMPLAN Group, 2014

## Industry Targets

A filtering approach is applied to the master list of all industries to identify and short list industries that meet certain criteria.

1. The first step is to calculate the employment growth over a five year time horizon (2009-2014) at the six digit NAICS code and delete any industries that had zero employment.
2. The second step is to calculate the location quotient for each industry against the state of Arizona and eliminate those industries that did not have a LQ greater than 0.50 in either 2009 or 2014.
3. The last step is to identify desired industry that did not meet the criteria, yet important to the Town's economic development efforts, and include those industries within the targeted industry list..

Five out of the ten industry clusters were identified as suitable. These industries clusters were deemed the most viable for the Town based on a combination of factors including workforce availability and educational attainment levels, industry growth trends, available land to accommodate this growth, and the Town's current economic development focus.

**Tourism, Agritourism and Hospitality** - With rising incomes, more leisure time and a growing awareness of the health benefits of physical fitness, the demand for recreation services will increase. Nationally the leisure and hospitality sector employs 15.6 million people and experienced an 18 percent increase in employment over 2004 to 2014. The Bureau of Labor Statistics (BLS) projects an annual employment growth rate of 0.6 percent from 2014 to 2024. This sector relies heavily on workers under the age of 25 to fill seasonal and unskilled positions. Travel and tourism spending accelerated in 2015, and strong employment and wage growth is expected within this industry sector in the future.

Payson is not known as an entertainment or recreation destination today. Growing this industry cluster will necessitate leveraging existing assets (such as hiking trails, Payson Event Center and a revitalized Town Center) and investing in parks, trails and connectivity to regional trails, which will build upon Payson's existing canvas.

This industry cluster employs the largest percentage of people in the Payson region at 24 percent and grew nearly 21 percent over five years.

**Business and Financial Services** – This cluster combines Professional and Business Services and Financial Activities. Nationally this cluster accounts for 18 percent of all non-farm jobs and includes both industries with high wages and high skills, such as engineering, legal, accounting, securities trading, and computer systems design. This cluster also includes industries that provide more basic support services to businesses such as call centers, telemarketing bureaus, temporary help services, facilities support services and administrative services. All are necessary for companies to be competitive. This cluster experienced a 32 percent increase in jobs from 2010 to 2014, which was the largest gain of all major industries and is projected to grow 9 percent by 2024. The Financial Services industry plays a vital role in the economy and is engaged in investing, lending, insurance, securities trading and securities issuance.

Payson experienced a 180 percent growth in employment within this cluster from 2004 to 2014, and is fairly highly concentrated within the region.

**Healthcare** - The Banner Payson Medical Center is a full-service general hospital with 44 inpatient beds. Banner provides inpatient, outpatient, diagnostic, imaging, medical, surgical and emergency care. The Physician shortage will increase due to value-based purchasing requirements, changes in Medicare

reimbursement, and overwhelming regulatory provisions. This situation will be exacerbated and felt more acutely in those areas with a high percentage of Medicare and Medicaid patients.

Population health management will grow over time, making wellness the norm. Areas with a high concentration of people over the age of 55, like Payson, will have an increased need for inpatient beds. Most diseases will be discovered before symptoms occur. Biometric testing and routine screening will be important along with medical fitness and wellness facilities, rehabilitation services, nutrition counseling, weight management, alternative medicine, and mental health services. Medical fitness and wellness facilities will be an integral component of the healthcare delivery system as the goal is to keep people healthy to reduce the incidence of chronic and degenerative diseases.

Healthcare occupations and industries are expected to have the fastest employment growth and add to the most jobs nationally between 2014 and 2024. Nationally this growth is anticipated to generate 9.8 million jobs, which represent a 6.5 percent increase over the 10 year timeframe. This industry cluster employs nearly 1,000 people in Payson grew 18 percent from 2004-2014.

**Software and Information Technology** - This industry cluster is comprised of businesses including computer systems design, software publishers, programming, data processing and hosting and customer service. All companies today rely on computer and information technology to conduct business and operate more efficiently. Software is used by tech companies in product development and continues to be valuable to scientists in research. Software is used in many applications including automation, cloud computing, mobile applications, gaming, security, social media, virtualization and for improving productivity. The job outlook for software developers and programmers is very bright with 12.5 percent projected increase in employment from 2014 to 2024, much faster than the average for all occupations at 6.5 percent. The primary reason for this rapid growth is a large increase in the demand for computer software.

Information technology consists of a broad group of industries including publishing, motion picture and sound recording, data processing and hosting. There are three types of establishments: (1) those engaged in producing and distributing information and cultural products; (2) those that provide the means to transmit or distribute these products as well as data or communications; and (3) those that process data. This industry experienced a 5 percent growth since 2010. Over the last five years establishment growth increased 5 percent with a 4 increase in employment.

Software and Information Technology is actually a component of the Professional and Business Services super sector. For this analysis it has been pulled out of that super sector to showcase it on its own. The Software and Information Technology cluster represents a very small percentage of all jobs in the Payson region, yet had the second highest growth behind Energy at 215 percent.

**Niche Manufacturing** – This cluster is comprised of manufacturing sectors that have some presence in the Payson region, which includes computer and electronic product manufacturing, some primary metals manufacturing, some forest and wood products and defense and security. According to the 2014 American Community Survey 5-year estimates, the Manufacturing sector supports an estimated 14.9 million jobs in the U.S. translating to 10 percent of the workforce. Payson has 4.1 percent of its workforce currently employed in manufacturing jobs, which exceeds Gila County and lags the State.

The Manufacturing sector continued to shed jobs from 2004 to 2014 and experienced a negative 1.6 percent annual rate of change. However, the BLS projects that the loss of jobs from 2014 to 2024 will slow to negative 0.7 percent annually, which compares to all employment at a 0.6 percent annually.

Manufacturing is undergoing changes fed by innovation and the desire to improve R&D efficiency. According to a recent survey conducted by the Manufacturers Alliance for Productivity and Innovation (MAPI), manufacturing executives indicate that they need to establish their operations in locations that can support and provide access to the latest technological advances with a strong talent pipeline. Payson presently does not have sites and buildings to accommodate this industry, but over the course of this 5-year plan it is anticipated that new employment areas surrounding the airport will emerge.

Manufacturing in the Payson region represents 1.5 percent of all jobs and like the nation, experienced a significant decline of 75 percent.

The following list are the five clusters and associated industries within each cluster. These targets should be the subject of the Town’s business retention, expansion, recruitment and entrepreneurship efforts.

**Table 14 – Industry Cluster Shortlist**

<b>Tourism, Agritourism and Hospitality</b>
Fruit farming
Tree nut farming
Beef cattle ranching and farming, including feedlots and dual-purpose ranching and farming
Poultry and egg production
Animal production, except cattle and poultry and eggs
Commercial logging
Commercial hunting and trapping
Bread and bakery product, except frozen, manufacturing
Wineries
Scenic and sightseeing transportation and support activities for transportation
Independent artists, writers, and performers
Museums, historical sites, zoos, and parks
Other amusement and recreation industries
Fitness and recreational sports centers
Bowling centers
Hotels and motels, including casino hotels
Other accommodations
Full-service restaurants
Limited-service restaurants
<b>Business and Financial Services</b>
Other financial investment activities
Insurance agencies, brokerages, and related activities
Funds, trusts, and other financial vehicles
Real estate
Lessors of nonfinancial intangible assets
Legal services
Accounting, tax preparation, bookkeeping, and payroll services
Architectural, engineering, and related services
Management consulting services
Environmental and other technical consulting services
Advertising, public relations, and related services
Photographic services
Facilities support services
Investigation and security services

<b>Business and Financial Services (Continued)</b>
Services to buildings
Landscape and horticultural services
Other support services
Waste management and remediation services
<b>Healthcare</b>
Offices of physicians
Offices of dentists
Offices of other health practitioners
Outpatient care centers
Home health care services
Other ambulatory health care services
Nursing and community care facilities
Residential mental retardation, mental health, substance abuse and other facilities
Veterinary services
<b>Software and Information Technology</b>
Wired telecommunications carriers
Data processing, hosting, and related services
Custom computer programming services
Computer systems design services
Other computer related services, including facilities management
<b>Manufacturing</b>
Industrial machinery manufacturing
Fabricated structural metal manufacturing
Machine shops
Other aircraft parts and auxiliary equipment manufacturing
Capacitor, resistor, coil, transformer, and other inductor manufacturing
Printed circuit assembly (electronic assembly) manufacturing
Electromedical and electrotherapeutic apparatus manufacturing
Relay and industrial control manufacturing
Asphalt shingle and coating materials manufacturing
Surgical appliance and supplies manufacturing
Polish and other sanitation good manufacturing
Small arms ammunition manufacturing
Wood container and pallet manufacturing
Wood kitchen cabinet and countertop manufacturing
Nonupholstered wood household furniture manufacturing
Burial casket manufacturing



## *Key Site Location Drivers*

A number of site location factors are taken into consideration by business and industry as they conduct their due diligence when identifying new business locations around the country. The last piece of the puzzle is understanding key site location criteria of the industry clusters to determine Payson's ability to accommodate industry requirements. This useful market intelligence will aid in understanding how your location stacks up and where there are possible deficiencies that need to be rectified to achieve job creation.

Site location factors that are always top of mind and rarely change from year to year include<sup>2</sup>:

- Labor — quality and availability
- Cost — employees, real estate, overall occupancy (including taxes, onetime costs, etc.)
- Accessibility — logistics and supply chain networks, access to markets, and inputs/employees, etc.

The following table is a summary of the site suitability analysis for each industry cluster. Criteria includes operating costs, operating environment and quality of life. These site location factors and criteria were compiled from several resources including industry publications, internet research, and ESI Corp's institutional knowledge from past experience. Under each criteria are site location factors that are rated as Critical Important, Very Important, Important, or Not Important.

Findings of the suitability analysis will help the Town leverage existing assets and where appropriate, the noted deficiencies will be the subject of the strategic plan to help overcome the short coming.

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<sup>2</sup> Area Development Magazine, "Corporate Executive Survey Commentary: Which Location Factors are Top of Mind, Q1 2016.

**Table 15 - Industry Cluster Site Location Criteria**

Criteria	Critically Important	Very Important	Important	Not Important
<b>Tourism and Hospitality</b>				
<b>Operating Costs:</b>	Occupancy/construction costs Wages and Fringe Benefits	Transportation Water/Sewer	Personal Income Tax Corporate Income Tax	Skilled Labor Supply Gas
<b>Operating Environment:</b>	Labor Supply Population & household growth Median household income market	High Speed Internet Diversity in dining and accommodation options Site access and visibility Career Technical Education	Economic development Incentives	Rail Service Proximity to Universities
<b>Quality of Life:</b>	Diversity in dining and accommodations Recreation	Diversity in housing and price points	Educational System	
<b>Healthcare</b>				
<b>Operating Costs:</b>	Wages and Fringe Benefits Cost of utilities Equipment Tax	Gas Occupancy/construction costs Transportation	Personal Income Tax Corporate Income Tax Economic development Incentives	Water/Sewer
<b>Operating Environment:</b>	Skilled Labor Supply Technical Labor Supply Career Technical Education Consistent Electric Power Population & household growth Educational System	Proximity to Investment Capital Highway Access High Speed Internet Established Cluster Existing sites and buildings Diversity in housing and price points	Accessibility to major airport Proximity to Related Universities Proximity to Research Facilities Tax and Regulatory Climate Recreation	Rail Service
<b>Quality of Life:</b>				

Criteria	Critically Important	Very Important	Important	Not Important
<b>Business &amp; Financial Services</b>				
<b>Operating Costs:</b>	Wages and Fringe Benefits Occupancy/construction costs	Personal Income Tax Corporate Income Tax	Economic development Incentives	Water/Sewer Gas Transportation
<b>Operating Environment:</b>	Skilled Labor Supply Consistent Electric Power Population & household growth High Speed Internet	Concentration of business		Rail Service Technical Labor Supply Accessibility to major airport
<b>Quality of Life:</b>	Educational System Diversity in housing and price points	Cultural Amenities	Recreation	
<b>Software &amp; Information Technology</b>				
<b>Operating Costs:</b>	Wages and Fringe Benefits Occupancy/construction costs	Personal Income Tax Availability of economic development Incentives	Corporate Income Tax Equipment Tax	Transportation
<b>Operating Environment:</b>	Telecommunications Cost of utilities	Proximity to business amenities	Economic development Incentives	
<b>Quality of Life:</b>	High Speed Internet Skilled Labor Supply Technical Labor Availability Redundant Power Infrastructure Available sites/buildings	Career Technical Education Fiber Optic Providers Low Disaster Risk	Tax and Regulatory Climate Accessibility to major airport	Rail Service
<b>Quality of Life:</b>	Diversity in housing and price points Educational System	Cultural Amenities Cost of Living	Recreation	

Criteria	Critically Important	Very Important	Important	Not Important
<b>Manufacturing</b>				
<b>Operating Costs:</b>	Wages and Fringe Benefits Occupancy/construction costs Equipment Tax	Energy costs Tax rates Economic development Incentives	Inbound-Outbound Shipping Costs	
<b>Operating Environment:</b>	Skilled Labor Supply Infrastructure Quality Consistent Electric Power Available sites/buildings Business Disruption Risk Highway Accessibility	Tax and Regulatory Climate Energy availability High Speed Internet Redundant Power Infrastructure Fast Track permitting	Environmental regulations Training programs/technical colleges Availability of long-term financing Right-to-work state Low union profile Proximity to suppliers	Accessibility to major airport Water availability Availability of advanced ICT services Raw materials availability Proximity to R&D centers Availability of unskilled labor Railroad service Waterway accessibility
<b>Quality of Life:</b>	Educational System	Diversity in housing and price points	Recreation	

Source: ESI Corp

## Cluster Occupations

Coordinating workforce and economic development, with a special focus on industry clusters, is an approach that is widely embraced today by states and local agencies. By working together and strategically targeting resources, agencies can more effectively utilize limited funds.

Key occupations associated with each industry cluster were identified to help training providers pinpoint the skills required by employers. With this information educational providers can better align their curriculum to the needs of the industry target employers.

Building a stronger education pipeline of skilled workers will require seamless connections between workforce and economic development and with the skill demands of the workplace.

**Table 16 – Industry Cluster Key Occupations**

Cluster	Key Occupations
<b>Tourism and Hospitality</b>	Amusement and recreation attendants, museum technicians, curators, fine artists, bicycle repairers, retail salespersons, cashiers, first line supervisors, hotel/motel desk clerks, hosts and hostesses, cooks, waiters and waitresses, dishwashers, bartenders, and baristas, arts, design, entertainment, sports and media occupations
<b>Healthcare</b>	Phlebotomists, diagnostic medical sonographers, radiologic technologists, magnetic resonance imaging technologists, home health aides, substance abuse and behavioral disorder counselors, mental health counselors, mental health and substance abuse social workers, registered nurses, medical and clinical laboratory technicians, veterinary technologists and technicians, veterinarians,
<b>Business and Financial Services</b>	Tellers, account clerks, brokerage clerks, insurance underwriters, insurance appraisers, securities, commodities, and financial services sales agents, loan officers, personal financial advisors, Legal secretaries, tax preparers, paralegals and legal assistants, survey researchers, architects, surveying and mapping technicians,
<b>Software and Information Technology</b>	Software developers, systems software; Software developers, applications; Computer user support specialists; Computer programmers; Sales representatives; Computer and information systems managers; Computer systems analysts; Computer user support specialists; Network and computer systems administrators; Computer network architects; Market research analysts and marketing specialists; General and operations managers; Customer service representatives; Sales representatives
<b>Manufacturing</b>	General operations manager, welding, soldering, and brazing workers, production workers, assemblers and fabricators, inspectors, testers, sorters, samplers, weighers, machinists and maintenance machinery workers, purchasing agents, computer controlled machine tool operators, computer numerically controlled machine tool operators, sales representatives, customer service representatives, production, planning, and expediting clerks, first-line supervisors, machinists, team assemblers, electromechanical equipment assemblers

## 4. Strategic Plan

The merits of any plan are derived from the implementation and commitment of the plan’s proponents, including the support of its stakeholders and partners. The economic development plan provides a strategic framework for aligning decisions and directing investments to help grow the Town’s employment.

The plan is rooted in an economic development vision and provides a framework for aligning operational decisions and priorities amongst departments and directing investment necessary to grow employment in the Town. The plan is meant to be flexible and could change over time to take advantage of a transforming environment. While the vision and goals of the plan remain the same, the objectives may change to accommodate the forever changing world and market in order to adapt to change.

### *Potential Opportunities*

#### *Town Center Redevelopment*

Main Street is the original Payson Townsite and has some of the oldest structures within the town; many with special historical significance. In recent years the economic viability of Main Street has been stifled by the emerging commercial competition along SR 260 and SR 87, as well as the great recession. In an effort to revitalize Main Street, the Town began a planning process in 2007 that focused on visioning and streetscape planning. Input was solicited and community workshops were held to learn what residents valued about Main Street and hear suggestions for improvement. For a variety of reasons, including the inability to agree on implementation, the effort was abandoned.

Re-planning and revitalizing small downtowns has become the focus of many small towns across the country. The changing demographics, combined with the transformation in retailing requires a new approach to downtown revitalization. By 2020, one-third of US households will be made up of either one person or nonfamily members. In Payson today 30 percent of all households have one person, and nonfamily member households comprise nearly 35 percent of total households.<sup>3</sup> Smaller households without children living at home are typically more amenable to higher densities and smaller units. They are more interested in town center or urban oriented recreation and entertainment attractions than are child-oriented households. Given the demographics of Payson and its location within the Rim Country, the Town Center has the potential to become a unique shopping, dining and entertainment destination for residents and visitors alike.



A strategic approach, however, is required that focuses on leveraging existing assets, designing the street for walkability, and affording social interaction. One of the building blocks to downtown revitalization is a mix of uses that incorporates high density housing. This land use adds to the social and economic vibrancy, and could help attract certain types of retail and dining back to Main Street.

<sup>3</sup> ACS, Occupancy Characteristics, 2014

Within the Town's 2015-16 Capital Improvements Plan (CIP) the Town has identified Main Street Enhancements as a future project beyond the year 2020. This project is vitally important to economic and tourism development. During the Main Street planning process in 2007-08 it received a tremendous amount of community support. Consideration should be given to making this project a higher priority and accelerating the project to an earlier timeframe.

### *American Gulch*

The American Gulch is a planned storm water drainage project that would be connected to the Green Valley Lake on the west end of Main Street and meander eastwards immediately south of the buildings along Main Street. This project has the potential to be a recreational amenity adjacent to the Town Center providing trails for walking and biking. With water trickling through the Gulch it creates a visual and peaceful ambiance that can easily serve as a catalyst for the economic revitalization of the Town Center. In the 2015-16 CIP, the Town has proposed annual funding through 2020 for channelization, construction of sidewalks and installation of landscaping and pedestrian amenities. To the extent that this project could be accelerated it could help jump start economic development within the Payson Town Center.



### *Tourism and Hospitality*

Tourism embodies the arts, entertainment, recreation, accommodations and food services industries and directly support 12 percent of all jobs in Payson. The money generated by the tourism industry flows through the economy, supporting each and every Payson resident. Attracting more visitors and keeping them for a longer duration is a goal of this plan. In order to achieve this goal Payson will need to leverage its strengths and offer a compelling experience that engages the visitor. Studies have shown that visitors remember:

- ✓ 10% of what they hear
- ✓ 30% of what they read
- ✓ 50% of what they see
- ✓ 90% of what they do

To attract more visitors Payson should complete the trails within Town that connect to regional trails in the area, which will allow for greater recreational activity; invest in the improvements at the Payson Event Center, which will facilitate the attraction of new events that bring people to Payson; and finally, implement the rebirth of the Payson Town Center by strategically investing in the design and streetscape of Main Street, fostering adaptive reuse of existing buildings, and entering into tactical public-private partnerships that advance the Towns' vision and goals.

Another untapped opportunity is the promotion of Agritourism. Within the Payson trade area are wineries, farms and ranches. Agritourism is promoted by other communities around the country and the experiences that they market include:

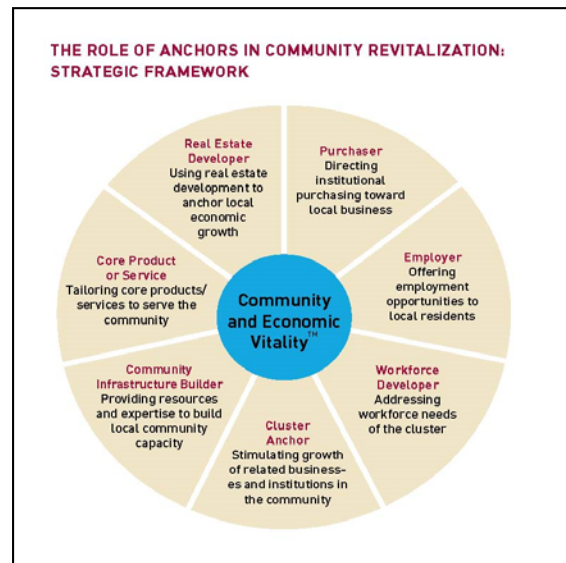
- Outdoor recreation (fishing, hunting, wildlife photography, horseback riding).
- Educational experiences (farm tours, cooking classes, wine tasting, cattle drives, or help work the ranch).
- Entertainment (harvest festivals, music festivals, holiday celebrations).
- Hospitality services (farm and ranch stays, bed and breakfast, camp sites, youth camp, farm stays, guided tours or outfitter services).
- On-farm direct sales (u-pick operations or roadside stands).
- Off-the-farm direct sales (farmers' markets, county and state fairs, special events).

Payson could launch an Agritourism venue to attract visitors by taking advantage of its regional assets and collaborating with agribusiness to become an Agritourism destination.

### Higher Education

The Multi-University campus consists of 253 acres and is located on the south side of SR 260, east of Mud Springs Road. This campus site is slated to be the home to a four-year university campus and has the potential to attract other higher educational institutions, as well as foster spin off activity and R&D operations. The project is currently in the design and engineering stages with groundbreaking expected the end of 2016 and the commencement of classes in the Fall of 2018.

Anchor institutions, such as higher education and hospital facilities, contribute to the economic vitality of their communities by providing jobs, purchasing local goods and services, improving local infrastructure and supporting its education, health and social needs. Working together with higher education providers to advance policies and operating practices that improve the economic and social fabric of Payson will ensure that a shared value is derived.



### Payson Airport

The Payson Municipal Airport includes the Sky Park Industrial Center, which is home to several key business establishments. As one of the designated growth areas of the Town, the airport area includes vacant unimproved industrial zoned land that has the potential to accommodate additional manufacturing operations. Planning and funding the backbone infrastructure to bring these parcels to market will help Payson become a competitor in attracting manufacturers who are interested in a rural setting.



## Local Challenges

### Talent

*Area Development Magazine* annually conducts two surveys: one with corporate executives and the other with site location consultants. The most recent corporate executives and consultants survey shows that the number one concern of respondents is the availability of a skilled workforce, which has an effect on new facility/expansion plans or on current operations. When corporate executives were asked what workers today are lacking, 63 percent indicated advanced skills such as advanced welding, machine tool programming and bioprocessing, 50 percent indicated STEM skills, and 37 percent indicated basic skills such as reading, comprehension, and mathematical competency. The decision where to locate facilities is highly dependent upon where the talent lives.

"For American students and workers to function successfully in the global economy of the 21st century, they must acquire knowledge and skills built on world-class academic standards."  
 ---National Council for Advanced Manufacturing (NACFAM)

Payson's median age of 55, combined with lower educational attainment rates can be a deterrent to attracting new business. Ensuring that Payson has a first class educational system and retaining young adults will be critically important in job creation efforts.

### Sites and Buildings

One of the first steps in the site selection process is the identification of an existing building or site. The Town is currently missing out on prospect activity due to the lack of existing buildings to accommodate office or industrial prospects. According to the Arizona Commerce Authority (ACA) and the Greater Phoenix Economic Council (GPEC), 80 percent of their prospects are looking for existing space. Based on ACA information, the average size of space that an industrial prospect is seeking in rural Arizona is 55,000 square feet.

**Table 17 – ACA Rural Prospect Activity and Requested Building Size**

Industry	Building Size (sq. ft.)	Building Type
Consumer Products & Services	40,000	Industrial Space
Agriculture, Forestry, Fishing & Hunting	40,000	Industrial Space
Renewable Energy	50,000	Industrial Space
Manufacturing	50,000	Industrial Space
Aerospace & Defense	50,000	Industrial Space
Bioscience & Biotechnology	60,000	Warehouse / Distribution
Mining, Quarrying, Oil & Gas	75,000	Other
Transportation / Warehousing	75,000	Warehouse / Distribution
Overall Average	55,000	

Source: ACA, March 2016

The Town is missing out on prospect activity due to its lack of existing buildings to accommodate industrial prospects. Prepared Economic Development Organizations (EDO's) should maintain an inventory of existing space with a strong mix of small/medium-sized sites coupled with in-depth, searchable websites

with demographic information. Payson should work with the local brokerage community to help prepare a land and building inventory.

### ***Broadband Infrastructure***

The business infrastructure of the 21<sup>st</sup> Century is broadband. Companies large and small alike require connectivity to run their operations, students utilize the internet for school work, residents conduct job searches, and e-commerce would not exist without the internet.

The Town experienced several internet and cellular communication outages over the last year that had a detrimental effect on the community. Banner Health was unable to properly treat patients, merchants could not process credit card payments, and residents lost the ability to utilize 911 emergency service. Town leaders have come together to collectively address the problem and have identified a solution that would provide some redundancy in the system and prevent the Town from being vulnerable in the future.

According to the FCC, broadband has gone from being a luxury to a necessity for full participation in the economy and society, and has reformed its Universal Service Fund (USF) and Intercarrier Compensation (ICC) systems to accelerate broadband build-out to rural America. In 2015 Century Link signed on to the FCC Connect America Fund to expand internet service in rural parts of their service territory. The FCC is providing Century Link \$500 million a year for six years to incentivize its broadband expansion. By 2017 Century Link must meet a 40 percent rollout target and each subsequent year it must add 20 percentage points to its rollout total, reaching 100 percent by 2020.

To achieve economic development success, Payson must continue to work with its coalition partners and collectively lobby Century Link to utilize the Connect America Fund to complete the fiber link to Payson.

### ***Plan Implementation***

Over the years many plans have been prepared for the Town including Main Street Vision and Streetscape Plan, the American Gulch Project, as well as recommendations to solve transportation issues. But due to a combination of inertia, lack of funding or public support these projects have not moved forward. In order to foster economic development, public investment must be prioritized and aimed at a variety of infrastructure projects to support job growth. These public investments will set the stage for private sector investment/development to follow. Without this Payson will continue to fall behind.

### ***Economic Development Incentives***

The final challenge the Town has when it comes to economic development is the high cost of the Town's development impact fees, as compared to Payson's competition. This becomes a barrier to entry for small business and Town Center revitalization. Fostering the growth of small business and promoting the adaptive reuse of existing buildings in the Town Center will require a review of these fees and a more creative approach to lessen the burden.

There is a need to raise the economic development bar by incorporating the tools required to promote economic development, which could include a dedicated source of funding similar to tourism and an economic investment program geared towards targeted industries. The investment program could be used in a variety of ways including infrastructure support, training incentives, rate subsidies, etc.

## Vision and Guiding Principles

The vision statement included within the 2007 updated Focused Future Plan was modified to reflect current community vision, ideals and values. This strategic plan is designed to support and bring about the preferred future envisioned by the Town and its stakeholders. The vision statement that anchors this plan is as follows:

***Payson has a strong, diverse and sustainable economy driven by collaboration, innovation, entrepreneurship, quality education, and life-long learning.***

The future is not just someplace where we are going, but a place that needs to be created.  
---Joel Kotkin

To further elaborate upon the vision, the stakeholders have identified key values and fundamental principles, which help underpin the goals and strategies of the plan.

1. Payson has an outstanding quality of life, a vibrant Town Center, community amenities, quality educational options, and an environment that fosters collaboration.
2. Payson strategically plans for growth and has the necessary infrastructure in place to foster a diverse tax base, attract private investment and create higher wage jobs for its residents.
3. Payson draws upon its rich heritage and natural resources and is recognized as an exceptional visitor destination that includes entertainment and recreational options including camping, hunting and fishing and a multi-use trail system for hiking and biking.
4. Payson is dedicated to enhancing its economic vitality, fostering the growth of high wage jobs, and cultivating life-long learning, entrepreneurship and innovation.

## Economic Development Strategy

The Town of Payson has a bright future ahead with the prospect of a multi-university campus, the rebirth of the Town Center, and community infrastructure investments that foster job growth. Strategically aligning its resources to diversify the economy and create high wage jobs within the Town is a focus of this strategic plan.

Achieving the goals of the strategic plan requires an equal focus on job growth, product improvement and marketing and promotion. Implementation of the economic development strategy will:

- Generate robust job growth within industry clusters by maximizing the assets that Payson has;
- Promote job creation and revenue generation of small business and local entrepreneurs;
- Guide investment in infrastructure and other capital projects to stimulate private sector development and job growth;
- Develop the marketing tools to effectively reach its target audience.

Focusing on industry clusters and an emphasis on entrepreneurship and growing small local business is also the subject of this strategic plan. Across the country, communities have embraced cluster based strategies and entrepreneurship as a means to promote job creation and stimulate innovation. The Town, in partnership with others, can have a major impact on the economy by fostering and enhancing the

growth of new business, which will in turn increase the volume and velocity of income within the community. To help the Town pinpoint industries that have the highest probability of expanding or locating in Payson, an industry target analysis was prepared which resulted in the following five industry targets.

- Tourism, Agritourism, and Hospitality
- Healthcare
- Niche Manufacturing
  - Firearms/Munitions Manufacturing
  - Wood Products
  - Computer and Electronic Products
- Software and Information Technology
- Business and Financial Services

There are six strategic initiatives with supporting goals, objectives and strategies that comprise the economic development strategic plan. These key initiatives take a relatively broad view of economic development in the sense that they represent a holistic approach to improving the “product” of Payson that in the long run will enhance job creation efforts. These major initiatives build on the Town's strengths to ensure long-term economic vitality and the enhancement of the quality of life.

**Five Year Economic Development Plan Key Initiatives and Goals**

Key Initiative	Goal
Job Creation	Diversify the economy and create higher wage jobs.
Town Center	Create a vibrant town center that becomes the one neighborhood shared by all.
Talent Development and Life Long Learning	Be the home to a competitive educational and workforce development system.
Entrepreneurship and Innovation	Create an entrepreneurial culture that stimulates the creation of new business.
Livable Community	Deliver the basic framework for a healthy and sustainable economy.
Marketing and Promotion	Create a robust economic development and tourism marketing program.

Each Key initiative is anchored by a goal followed by Objectives and a series of strategies. Identification of short term (1-2 years) and long term (3-5 years) determine the timing for launching implementation and

achieving desired outcomes. Performance measures have also been identified for each initiative, along with the lead and supporting organizations taking responsibility for implementation.

The success of this ambitious strategy requires alignment of goals and funding priorities between town departments and organizations. Equally important is the Town's collaboration with public and private sector partners throughout the community/region to carry out the actions outlined in the strategy. To accomplish this, it is highly recommended that an Economic Development Advisory Committee (EDAC) be appointed by the Town Council to work with the Town in support of key economic development initiatives and provide input on the plan direction and future updates.

Membership composition of EDAC should be broad based and include representatives from: healthcare, education (PUSD and Gila Community College), workforce development, manufacturing, tourism, finance, real estate brokerage and development, utilities, as well as strategic partners such as the Chamber of Commerce, Payson IDA, and others as appropriate. Operating guidelines, including the term of appointment should be established and the EDAC should meet monthly with the chair and vice-chair of the committee elected by the EDAC. Implementation and oversight of the strategy will be managed by the Community Development Department, Economic Development Division.

Without adequate resources this economic development plan will not be successful. This strategy requires reliable multi-year operating support for the key initiatives, including work that supports job growth, capital improvements that foster economic development, and marketing and promotion that propels the community forward.

On the following pages is the economic development strategic action plan.

## Key Initiative: Job Creation

### *Goal - Diversify the economy and create higher wage jobs.*

#### Objective 1: Launch a business recruitment campaign aimed at targeted industries.

Strategies:	1-2 Yrs.	3-5 Yrs.	Lead and Supporting Organizations
1. Identify companies within the industry clusters that have the best opportunity for investment and growth. <ul style="list-style-type: none"> <li>a. Consider engaging a firm to help with industry identification.</li> <li>b. Elevate the profile of Payson within each cluster by promoting your competitive advantage.</li> </ul>		X	Town of Payson  ACA  APS  NGCEDC
2. Develop a one page marketing piece geared towards each cluster.	X		
3. Develop specific marketing strategies that focus on the targeted companies.		X	
4. Utilize the academic programs within the higher education institutions to aid in the recruitment and retention process.		X	
5. Participate with ACA in appropriate recruitment missions, trade shows and business calls.		X	
6. Engage economic development allies (ACA, utility providers, etc) to leverage marketing opportunities.	X		

**Performance Measurements:** Number of new jobs created; number of new companies that locate in Payson; median household income

#### Objective 2: Implement a Business Retention and Expansion (BRE) Program.

Strategies:	1-2 Yrs.	3-5 Yrs.	Lead and Supporting Organizations
1. Gather information on local business. <ul style="list-style-type: none"> <li>a. Create a small subcommittee of volunteers.</li> <li>b. Draft or select a survey or assessment instrument to use when making business calls.</li> <li>c. Create a business database and identify businesses for visitations.</li> <li>d. Schedule one day a month to conduct 5-10 business calls.</li> <li>e. Review survey results and identify immediate action items.</li> </ul>	X		Payson Economic Development  Rim Country Regional Chamber of Commerce  ACA Center for Entrepreneurship & Leadership Development  NGCEDC

## Key Initiative: Job Creation (Continued)

Strategies:	1-2 Yrs.	3-5 Yrs.	Lead and Supporting Organizations
2. Identify existing training programs offered by SBDC, One Stop, ACA and others that foster the growth of small business and local entrepreneurs.	X		Payson Economic Development
3. If warranted by the business surveys, prepare and launch a bid/match program or business-to-consumer buy-local program.		X	Rim Country Regional Chamber of Commerce
4. Consider conducting an annual Business Appreciation Luncheon. a. Secure a sponsor and venue. b. Develop the agenda send out invitations.		X	ACA Center for Entrepreneurship & Leadership Development
5. Assess and measure the results of the program and realign as needed.		X	NGCEDC

**Performance Measurements:** Number of jobs created/retained; number of companies assisted

### Objective 3: Foster the growth of small business.

Strategies:	1-2 Yrs.	3-5 Yrs.	Lead and Supporting Organizations
1. Become the repository of information for small business. a. Compile a list of incentives and training programs offered to Arizona small business and annually update the list. b. Include the type of program, organization name and contact information. c. Include information and links from the Payson website.	X		Payson Economic Development  ACA  SBDC  Gila Community College
2. Work with the SBDC and Gila Community College to offer training programs, seminars and courses directed at young and startup companies on various topics that could include talent attraction, basic financial skills, business plan development, website design/analysis, press release writing/dissemination, marketing and sales, and graphic design.	X		Northeastern Arizona Workforce Solutions (NEAZIWS)  Rim Country Regional Chamber of Commerce
3. Conduct business roundtables that partner new business owners with accomplished business in their industry.	X		NGCEDC

**Performance Measurements:** Number of participants in training programs and business roundtables; number of business licenses issued

## Key Initiative: Job Creation (Continued)

### Objective 4: Develop economic development tools to successfully attract and retain business.

Strategies:	1-2 Yrs.	3-5 Yrs.	Lead and Supporting Organizations
1. Prepare an inventory of available sites and buildings in Payson. a. Identify sites that are “shovel ready.” b. Apply to the ACA for the certification of sites and buildings. Approved sites can be listed on their website.	X		Town of Payson  Local Real Estate Brokers
2. Create an economic investment program geared toward targeted industries. a. Identify the minimum criteria for eligibility. b. Consider project investments such as fee waivers or reduction, retail sales tax rebate, expedite plan review, etc.	X		Town of Payson
3. Consider the creation of a deal closing fund to be used for projects that meet Town criteria.	X		
4. Enhance the Economic Development Division’s technologies to effectively manage prospect activity. a. Identify the features most needed such as email integration, file sharing, customer interaction, import data, dialing capabilities, etc. b. Research the various off-the-self software programs such as Salesforce, Cloud 9, ACT, etc. to determine which would be the most suitable.		X	
5. Conduct a return on investment analysis of the various economic development projects that the Town is working on.	X		

**Performance Measurements:** Creation of policies and adoption of an investment program and deal closing fund; completion and maintenance of building/site inventory

### Objective 5: Advance the construction and availability of quality industrial buildings.

Strategies:	1-2 Yrs.	3-5 Yrs.	Lead and Supporting Organizations
1. Identify the type and size of a spec building that is most demanded by the targeted industries.		X	Town of Payson
2. Work with the development community and facilitate plan review, permitting and certificate of occupancy.		X	
3. Consider providing Town owned land to encourage private developers to build shell structures.		X	

**Performance Measurements:** Number of new buildings and square feet of new space built



## Key Initiative: Town Center

***Goal – Create a vibrant town center that becomes the one neighborhood shared by all.***

### Objective 1: Continue the efforts to revitalize Old Town Payson.

Strategies:	1-2 Yrs.	3-5 Yrs.	Lead and Supporting Organizations
1. Implement the streetscape plan that facilitates the ability of residents and visitors to walk, shop, and recreate in Old Town Payson. a. Identify and allocate funds, which could include general fund dollars, CDBG, other grants, loans, etc.	X		Town of Payson
2. Engage local property owners in a discussion about revitalization.	X		
3. Identify a catalyst project to work on that could stimulate additional development.	X		
4. Promote adaptive reuse and infill development in Old Town Payson. a. Create an asset inventory of existing buildings and vacant lots to identify opportunities. b. Create an Old Town Center development program aimed at opportunity sites. c. Create an adaptive reuse and infill program that incentivizes the private sector by removing barriers to entry such as providing regulatory relief, streamlining the process and anything else that could help reduce the development risk. d. Consider the creation of an Old Town Zoning District and/or utilize a form based code approach. i. Establish development incentives that helps promote the vision. ii. When necessary assist private developers with land assemblage.		X	

**Performance Measurements:** Completion of the streetscape plan; dollar value of private investment; implementation of a catalyst project

### Objective 2: Foster market synergy in Old Town.

Strategies:	1-2 Yrs.	3-5 Yrs.	Lead and Supporting Organizations
1. Research and learn from other communities who have been successful in revitalizing their town center.	X		Town of Payson
2. Recognize how the physical layout of a commercial district can impact businesses and customer traffic.		X	Old Town Merchant's Association
3. Promote sidewalk cafes and outdoor dining.		X	
4. Utilize common hardscape elements such as seating, bike racks, trash cans, etc. to promote the unique character.		X	
5. Foster entrepreneurial talent by allowing pop up retail to take place within designated areas.		X	

## Key Initiative: Town Center (Continued)

Strategies:	1-2 Yrs.	3-5 Yrs.	Lead and Supporting Organizations
6. Promote cooperation among business owners, property owners, volunteers, etc.		X	Town of Payson
7. Develop a recruitment campaign targeting specific restaurant and retail business establishments. <ol style="list-style-type: none"> <li>Research your primary consumer segments.</li> <li>Look for market gaps and niches.</li> <li>Survey the community to find out what they want in Old Town.</li> </ol>		X	
<b>Performance Measurements:</b> Creation of placemaking elements that foster revitalization; number of new tenants			
<b>Objective 3: Market Old Town Payson as unique and distinctive from other areas of the Town.</b>			
Strategies:	1-2 Yrs.	3-5 Yrs.	Lead and Supporting Organizations
1. Develop marketing materials that showcase the vision for Old Town Payson.		X	Town of Payson
2. Develop a logo or slogan to strengthen the Old Town brand.		X	
3. Encourage business to align their own advertising efforts with those promoting Old Town.		X	
4. Develop a social media and e-marketing campaigns.		X	
5. Secure a URL for Old Town Payson and include links of local business, calendar of events and promotions.		X	
<b>Performance Measurements:</b> Development of an Old Town marketing program			
<b>Objective 4: Enhance the Old Town experience.</b>			
Strategies:	1-2 Yrs.	3-5 Yrs.	Lead and Supporting Organizations
1. Create special events that celebrate arts and culture. Examples include: <ul style="list-style-type: none"> <li>Arts and crafts fairs.</li> <li>Outdoor studios allowing artists to showcase their work</li> <li>Outdoor live music and/or theater series.</li> </ul>		X	Rim Country Regional Chamber of Commerce  Old Town Merchants Association
2. Strategically program and manage the calendar of events.	X		
3. Encourage additional housing types and increased density within proximity to Old Town Payson, Green Valley Park, and the American Gulch project. <ol style="list-style-type: none"> <li>Identify appropriate locations.</li> </ol>		X	
4. Work with property owners and or developers	X		
<b>Performance Measurements:</b> Create and maintain a calendar of events; number of annual events; number of new housing units			

## Key Initiative: Town Center (Continued)

Objective 5: Implement the American Gulch Project as an economic development catalyst to Old Town Redevelopment.

Strategies:	1-2 Yrs.	3-5 Yrs.	Lead and Supporting Organizations
1. Implement the existing plan for the American Gulch project that promotes connectivity to the Town Center. <ul style="list-style-type: none"> <li>a. Maximize the potential of the American Gulch by incorporating walking/biking paths and wayfinding signage.</li> <li>b. Prepare a hardscape plan that includes benches, lighting, pet waste stations, and trash containers.</li> <li>c. Consider the placement of public art along the American Gulch project that reflects the western heritage of Payson.</li> </ul>	X		Town of Payson
2. Identify funding sources that can be used to the project and necessary infrastructure such as Community Facilities District (CFD) Municipal Improvement District (MID), General Obligation Bonds, grants and loans.	X		
<b>Performance Measurements:</b> Secure funding for the American Gulch			

## Key Initiative: Talent Development & Life-Long Learning

*Goal – Be the home to a competitive educational and workforce development system.*

Objective 1: Strengthen the collaboration with Northeastern Innovative Arizona Workforce Solutions.

Strategies:	1-2 Yrs.	3-5 Yrs.	Lead and Supporting Organizations
1. Identify and meet the key program administrators of the Northeastern Arizona Innovative Workforce Solutions (NEAZIWS).	X		Town of Payson
2. Provide the NEAZIWS with information on Payson’s targeted industry clusters.	X		NEAZIWS
3. Collaborate with the NEAZIWS to identify skill gaps of the targeted clusters and ways to fill the gaps.		X	
4. Work with the NEAZIWS on sector and cluster based approaches for the provision of specialized workforce training.		X	
5. Provide letters of support for grant opportunities that NEAZIWS pursues that could benefit Payson.	X		
6. Share the aggregated BRE survey results relating to the workforce.		X	
<b>Performance Measurements:</b> Regularly meet and work with NEAZIWS			

## Key Initiative: Talent Development & Life-Long Learning (Continued)

**Objective 2: Align workforce development activities and programs with economic development targets and the needs of the business community.**

Strategies:	1-2 Yrs.	3-5 Yrs.	Lead and Supporting Organizations
1. Enhance the communication between industry, education and government on short and long-term workforce needs.		X	Town of Payson PUSD
2. Based on the Town's industry targets, identify the education and skill requirements that are needed and work closely with K-12, CTE and Gila Community College to ensure education and training are aligned.		X	Gila Community College
3. Promote the Payson One-Stop services to local business.		X	NEAZIWS
4. Act as a liaison between manufacturers and training providers.		X	NAVIT
5. Link high school and college students with internship and job shadowing opportunities. a. Partner with educational institutions to create an online source of information. b. Outreach to business		X	CVIT
6. Help promote job fairs.		X	
7. Collaborate with the healthcare industry to assist them with recruiting doctors and other healthcare professions, as well as identifying jobs for the "trailing spouse."	X		

**Performance Measurements:** Number of jobs created; retention of area youth; number of companies serviced by the "One Stop"

**Objective 3: Expand paid and unpaid youth work experiences.**

Strategies:	1-2 Yrs.	3-5 Yrs.	Lead and Supporting Organizations
1. Help youth gain career readiness skills, increase their knowledge of workplace settings, and establish work history. a. Facilitate the creation of an internship program at the high schools. b. Identify opportunities for job shadowing with area employers (public and private) to help youth gain an up-close look at the world of work; facilitate the connections. c. Ask area employers to provide workplace visits and tours for small groups of students; show a range of occupations and career options (Examples include healthcare, finance, manufacturing, and government). d. Invite employers to come to the schools and be guest speakers and talk about their industry and careers. e. Work at the grass roots level through the Rim Country Regional Chamber of Commerce of Commerce, Rotary Clubs, and other local business groups to identify businesses that would provide internship opportunities.	X		Town of Payson PUSD Rim Country Regional Chamber of Commerce Private business

## Key Initiative: Talent Development & Life-Long Learning (Continued)

Strategies:	1-2 Yrs.	3-5 Yrs.	Lead and Supporting Organizations
2. Explore a summer youth employment program that combines classroom basic soft skills training with on-the-job work experience. Seek partnership with NEAZIWS and funding from Goodwill and other organizations.	X		Town of Payson  NEAZIWS
<b>Performance Measurements:</b> Number of internships created; establishment of a youth employment program			
<b>Objective 4: Support the efforts to improve the quality of K-12 education.</b>			
Strategies:	1-2 Yrs.	3-5 Yrs.	Lead and Supporting Organizations
1. Emphasize career pathway development that is student-centered and demand-driven.	X		NEAZIWS  PUSD
2. Encourage and support investments in Science, Technology, Engineering and Math (STEM) education programming to prepare students for future employment.	X		Gila Community College
3. Explore the creation of a joint plan for economic development between Payson and NEAZIWS to coordinate economic development, workforce development and education efforts.		X	Town of Payson
<b>Performance Measurements:</b> Creation of a STEM evaluation program by the PUSD; integrated curriculum that aligns with industry; alignment of career pathway with post-secondary education			
<b>Objective 5: Create the atmosphere for Life-Long Learning.</b>			
Strategies:	1-2 Yrs.	3-5 Yrs.	Lead and Supporting Organizations
1. Help education providers market programs, seminars, and classes aimed towards learners of all ages to acquire and apply knowledge and skills for self-improvement.	X		Town of Payson  PUSD  Gila Community College  SBDC
2. Encourage the use of multiple platforms of education delivery including small groups, on line instruction, cooperative learning and peer tutoring.		X	Town of Payson  PUSD  Gila Community College  SBDC  IDA

## Key Initiative: Talent Development & Life-Long Learning (Continued)

Strategies:	1-2 Yrs.	3-5 Yrs.	Lead and Supporting Organizations
3. Convene a meeting with local business, education providers and the SBDC. <ul style="list-style-type: none"> <li>• Discuss seminars that could be provided to improve skill gaps.</li> <li>• Continue to provide training for small business on various topics such as basic financial skills, business plan development, website design/analysis, press release writing, marketing and sales and graphic design. (Cross referenced with Job Creation and Entrepreneurship).</li> </ul>	X		Town of Payson  PUSD  Gila Community College  SBDC  IDA
<b>Performance Measurements:</b> Number of annual training programs conducted; number of participants in training programs			

## Key Initiative: Entrepreneurship & Innovation

***Goal – Create an entrepreneurial culture that stimulates the creation of new business.***

**Objective 1: Assess the entrepreneurial talent in Payson.**

Strategies:	1-2 Yrs.	3-5 Yrs.	Lead and Supporting Organizations
1. Conduct an opportunity assessment to determine the local entrepreneurial talent, development resources that are available, and likely stakeholders to support the effort. <ol style="list-style-type: none"> <li>a. Utilize the assessment tool resources from the Center for Rural Entrepreneurship to help you determine where to spend your time and effort.</li> <li>b. Target groups of entrepreneurs that best meet your objective.</li> <li>c. Develop a strategy for supporting entrepreneurs.</li> <li>d. Conduct outreach to targeted groups to create a pipeline.</li> </ol>		X	Town of Payson  SCORE  SBDC  Gila Community College  ACA  IDA
<b>Performance Measurements:</b> Creation and implementation of an assessment tool			

## Key Initiative: Entrepreneurship & Innovation (Continued)

### Objective 2: Build capacity in the system to help launch entrepreneurs.

Strategies:	1-2 Yrs.	3-5 Yrs.	Lead and Supporting Organizations
1. Become the single point of contact for entrepreneurial assistance. <ul style="list-style-type: none"> <li>a. Prepare a list of general resources and start up tools for entrepreneurs and provide links from the economic development website.</li> <li>b. Connect young and startup companies with mentors such as SCORE, Springboard Enterprises, and MicroMentor, a free online service.</li> <li>c. Consider the creation of an Entrepreneurs Club which brings together entrepreneurs to network, share strategies and find and share resources.</li> </ul>	X		Town of Payson  SCORE  SBDC  Gila Community College  ACA
2. Continue to work with the SBDC to offer entrepreneurial training and education programs, seminars and courses directed at young and startup companies on various topics that could include talent attraction, basic financial skills, business plan development, marketing plan, website design/analysis, press release writing/dissemination, marketing and sales, and graphic design. (Cross referenced with Job Creation and Lifelong Learning).	X		Town of Payson  SBDC  Gila Community College
3. Build internal capacity by having Staff attend training seminars on entrepreneurship to learn techniques and best practices.		X	Town of Payson
4. Tap into local philanthropy to provide seed capital for young and startup companies.		X	Town of Payson
5. Become familiar with the ACA innovation grant programs and market the grant opportunities to local entrepreneurs.		X	Town of Payson
<b>Performance Measurements:</b> number of new business establishments; number of training programs; number of participants in training programs; creation of a seed capital fund			

## Key Initiative: Entrepreneurship & Innovation (Continued)

Objective 3: Establish a strong economic development partnership with the future multiuniversity campus.

Strategies:	1-2 Yrs.	3-5 Yrs.	Lead and Supporting Organizations
1. Work with the multiuniversity as a critical economic development partner to identify and foster spin off business activity. <ul style="list-style-type: none"> <li>a. Establish a task force of key faculty and industry leaders who meet on a regular basis to discuss research and identify technology transfer and potential commercialization opportunities.</li> <li>b. Be the bridge that links entrepreneurs with the tech commercialization opportunity.</li> <li>c. Consider the establishment of an innovation zone within proximity to the university that includes incubator space to help launch new businesses.</li> <li>d. Identify grant monies and technical assistance to support early-stage technology companies.</li> <li>e. Develop relationships with the venture capital community.</li> </ul>	X		The Alliance  MHA  University  Elected Officials

**Performance Measurements:** Creation of a task force; value of commercialization launched; number of early stage startup companies

## Key Initiative: Livable Community

*Goal – Deliver the basic framework for a healthy and sustainable economy.*

Objective 1: Provide adequate infrastructure and public facilities to remain competitive and meet the needs of a growing community.

Strategies:	1-2 Yrs.	3-5 Yrs.	Lead and Supporting Organizations
1. Plan for and invest in a multi-generational recreational center that could include an aquatic facility, basketball court, workout area, meeting rooms and kitchen facility.		X	Town of Payson  Gila County
2. Expand McLane Road to connect Old Town with the Payson Event Center.		X	
3. Create a staging area outside of town for OHV's, which can be used to attract visitors who utilize the trails.		X	
4. Leverage trails and outdoor recreation in the region to attract visitors. <ul style="list-style-type: none"> <li>a. Work towards the completion of an integrated trails system within town for hiking and biking.</li> <li>b. Promote trails within the region for public use.</li> <li>c. Form a regional trails system by linking the town's trail system with Strawberry, Pine, Star Valley and Rye.</li> </ul>	X		



## Key Initiative: Livable Community (Continued)

Strategies:	1-2 Yrs.	3-5 Yrs.	Lead and Supporting Organizations
5. Facilitate development of neighborhood parks in underserved areas of the Town.		X	Town of Payson
6. Complete the improvements at the Payson Event Center, including covering the arena and adding rest room facilities.		X	Gila County
7. Beautify Highways 87 and 260 by enhancing the streetscape to improve the visual aesthetics		X	
8. Invest in a public arts program and capitalize on Payson’s western theme with art placement in Old Town Payson, along the American Gulch, and other public places.		X	
9. Review the infrastructure capabilities within key employment areas (Town Center, Airport industrial area, University area). <ul style="list-style-type: none"> <li>a. Identify deficiencies within these areas.</li> <li>b. Prepare an infrastructure plan that includes wet and dry utilities, telecom, streets and roads.</li> <li>c. Identify funding mechanisms and timing.</li> </ul>	X		
10. Support broadband initiatives that would upgrade the technology, provide redundancy in the system, and increase the number of service providers. <ul style="list-style-type: none"> <li>a. Collaborate with NEAZIWS on their broadband initiative.</li> <li>b. Form a regional Broadband Committee, which includes representatives from Northeastern Arizona, and collaborate on a solution.</li> <li>c. Work with Century Link and encourage them to utilize their Connect America Fund, which is a FCC subsidy aimed at rural America, to provide broadband internet access in Payson.</li> <li>d. Identify funding sources and partners to expand the fiber cable in the area.</li> <li>e. Continue to work with APS on fiber siting and potential management options.</li> <li>f. Incorporate internet hotspots within Town facilities.</li> </ul>	X		Town of Payson  NEAZIWS  APS  Coconino, Navajo and Apache Counties  Century Link
<b>Performance Measurements:</b> value and completion of transportation improvements; miles of trail system completed; preparation of an infrastructure plan; completion of event center improvements; creation of a public arts program; expansion of the broadband			

## Key Initiative: Livable Community (Continued)

Objective 3: Pursue catalyst projects that fulfill Payson’s economic development vision and values.

Strategies:	1-2 Yrs.	3-5 Yrs.	Lead and Supporting Organizations
1. Begin implementing the American Gulch Project, including visioning, engineering and identifying funding sources and public-private partnerships. (Cross referenced with Town Center)	X		Town of Payson The Alliance
2. Determine the market feasibility of attracting a resort/conference facility that could accommodate small association meetings and conferences.	X		PUSD
3. Determine the feasibility of developing a small performing arts facility.		X	IDA
<b>Performance Measurements:</b> Progress towards American Gulch implementation; completion of feasibility studies			

## Key Initiative: Marketing & Promotion

*Goal – Create a robust economic development and tourism marketing program.*

Objective 1: Promote Payson as a Visitor Destination.

Strategies:	1-2 Yrs.	3-5 Yrs.	Lead and Supporting Organizations
1. Create a robust marketing campaign that promotes Payson as a year-round visitor destination for outdoor recreation; including birdwatching, camping, fishing, boating, hunting, hiking, and biking, <ol style="list-style-type: none"> <li>Secure funding to place advertising in targeted trade publications.</li> <li>Continue and expand the robust social media campaign and track web traffic.</li> <li>Continue to identify partners and tourism bloggers that can help promote Payson.</li> <li>Continue to utilize the services and the cooperative advertising program from the Arizona Office of Tourism.</li> <li>Collaborate and partner with other organizations.</li> </ol>	X		Town of Payson Arizona Office of Tourism (AOT) Rim Country Regional Chamber of Commerce
2. Provide gateway enhancements such as monument signage to promote a better sense of arrival in Payson.	X		Town of Payson
3. Continue to market the Payson Event Center Activities. <ol style="list-style-type: none"> <li>Expand marketing reach by identifying other geographic markets and consumers to target.</li> </ol>	X		Town of Payson

## Key Initiative: Marketing & Promotion (Continued)

Strategies:	1-2 Yrs.	3-5 Yrs.	Lead and Supporting Organizations
<p>4. Leverage the agritourism activity within the region to expand visitor options (wineries, orchards, ranches).</p> <ul style="list-style-type: none"> <li>a. Identify farm, ranch, and food processing operations within the region that could become regional attractions.</li> <li>b. Talk to the owners of farms and food processing operations and encourage them to establish visitor programs, such as demonstrations, educational activities, FAM tours, and “you pick it” activities.</li> <li>c. Encourage these operations to participate in the local Farmers Market.</li> <li>d. Help promote these agritourism destinations.</li> </ul>		X	Town of Payson  Rim Country Regional Chamber of Commerce  NGCEDC
<p>5. Stage an annual multi-day mountain biking event similar to Flagstaff’s Barn Burner.</p> <ul style="list-style-type: none"> <li>a. Create a working group of volunteers to identify areas for a single track trail and assist with programming and arrangements.</li> <li>b. Promote the event through the Payson tourism website, mountain bike associations, social media, etc.</li> <li>c. Use information from registration forms to begin developing a database of visitors.</li> </ul>		X	Town of Payson  Collaborative partners
<p>6. Work with the Arizona Office of Tourism and conduct a 12 month visitor survey to gain a better understanding of who your visitors are, where they are coming from, what they are doing, how long they are staying and how much money they are spending.</p>	X		Town of Payson  AOT
<b>Performance Measurements:</b> number of qualified leads; increase in sales tax generation; increase in hotel occupancy; completion of a visitor study			
<b>Objective 2: Enhance Payson’s image as a desirable location to start, locate and operate a business.</b>			
Strategies:	1-2 Yrs.	3-5 Yrs.	Lead and Supporting Organizations
<p>1. Develop a standard package to provide to new and expanding business that includes all aspects of site selection criteria such as labor, taxes, fees, real estate, vendors, suppliers, etc.</p>	X		Town of Payson
<p>2. Develop and deploy a print and digital marketing campaign.</p>	X		Town of Payson
<p>3. Market Payson sites and buildings on AZ Prospector, CoStar, Loopnet , etc.</p>	X		Town of Payson  APS
<p>4. Tap into the co-op advertising program offered through ACA in order to raise awareness of Payson as a business location.</p>		X	Town of Payson  ACA

## Key Initiative: Marketing & Promotion (Continued)

Strategies:	1-2 Yrs.	3-5 Yrs.	Lead and Supporting Organizations
5. Improve the economic development landing page on the Town’s website and update it regularly. <ul style="list-style-type: none"> <li>a. Include the services provided, demographic information, links to sites and buildings and other resources.</li> <li>b. Provide a downloadable map of the community</li> </ul>	X		Town of Payson
<b>Performance Measurements:</b> development of marketing materials; number of qualified leads; number of print and digital ads; website improvements			
<b>Objective 3: Develop a robust business recruitment campaign.</b>			
Strategies:	1-2 Yrs.	3-5 Yrs.	Lead and Supporting Organizations
1. Delineate a marketing message for economic development based on the Town’s vision for higher paying jobs.		X	Town of Payson
2. Implement content marketing strategies. <ul style="list-style-type: none"> <li>a. Choose content marketing goals that can be measured, such as increasing brand awareness in certain markets, drive traffic back to your website, drive readers to a lead-generation landing page, etc.</li> <li>b. Develop a print and digital marketing strategy</li> <li>c. Use “call to action” in collateral to promote engagement and facilitate performance tracking.</li> <li>d. Recycle your content on a number of channels and media types, i.e. take live webinar and record the video and put it on YouTube, put the presentation on Slide Share, etc.</li> <li>e. Create a targeted marketing program on social media.</li> </ul>		X	NGCEDC
3. Continue the social media marketing campaign. <ul style="list-style-type: none"> <li>a. Establish goals and objectives that Payson hopes to achieve.</li> <li>b. Assess the results of how the social media marketing is performing.</li> <li>c. Create a content plan and editorial calendar.</li> </ul>	X		Town of Payson
<b>Performance Measurements:</b> development of marketing materials; number of qualified leads; number of print and digital ads; number of hits tracked on social media			

# Appendix A – SWOT

## Payson SWOT Analysis Summary

### STRENGTHS

#### Quality of Life

- Natural environment
- Climate that consists of four seasons
- Small own feel, friendly and good family environment
- Great place to live with low crime rate
- Outdoor recreation
- Access to hunting, fishing, hiking, camping

#### Assets

- Green Valley Park
- Proximity to Phoenix
- Future C.C. Cragin pipeline and secure future water resource
- General aviation airport that can accommodate small corporate jets
- Progressive minded elected officials
- Pro-business government
- Capacity in the treatment facility
- The largest Ponderosa Pine Forest in the world.
- Proximity to Tonto Natural Bridge and the Tonto National Forest
- Existing trail system that can be expanded

#### Programs

- Tourism attraction program
- Annual events that are staged in Payson
- Relationship with Northern Arizona Vocational Institute of Technology (NAVIT)
- Industrial Development Authority that has the ability to issue bonds for financing
- Gila Community College's 2-year nursing program

## **WEAKNESSES**

### **Economic**

- Limited employment opportunities
- Lack of a skilled workforce
- Predominantly low wages
- Exodus of youth for higher education or job opportunities
- Inadequate funding or dedicated tax to implement key economic development projects
- Impact fee structure deters development or redevelopment in downtown along Main Street
- High land and development costs
- Lease rates are high and small locally owned business can't afford the rent
- Lack of diversity and quality in retail and restaurant offerings
- Tourists drive through Payson and don't stay since there is little to do once they are in Payson
- Jobs for trailing spouse are lacking
- Gila Community College (GCC) District in Payson is a provisional college and does not have its own budget
- Lack of state funding for education
- No state enabling legislation that allows for tax increment financing
- Economy that is highly reliant on tourism
- Proximity to Phoenix perpetuates trade leakage
- Seasonal tourism market
- Inconsistent business hours on Main Street
- Existing mix of business on Main Street

### **Social**

- Payson does not have an identify that everyone agrees on (eclectic mix of Western, vs Alpine vs Native American)
- Lack of a unified vision and economic vibrancy on Main Street
- Inconsistent political will to complete projects
- Disconnect between what the town wants in downtown and what is allowed
- Lagging school test scores
- Housing stock is expensive and lacks diversity
- Employment turnover of school teachers due to lower salaries
- 32% of home ownership is seasonal or recreational
- Increasing median age
- There is no transit system
- Business community is not working together

### **Physical**

- There is not an identifying gateway into the community
- There is no real "downtown"
- Main Street is not a walkable downtown and is missing a "sense of place" that people can embrace
- Absence of design guidelines specific to historic Main Street
- Circulation among the interior streets is not seamless since connections are missing
- Lack of large industrial parcels or fully serviced industrial sites
- Lack of a secure and redundant broadband infrastructure which is vulnerable to outages
- The Town is land locked and may be unable to secure additional Forest Service land to expand the tax base
- Absence of dedicated non-motorized trails
- No natural gas, which is less expensive than propane

## OPPORTUNITIES

### Main Street

- Development of vacant parcels in downtown
- Restore and repurpose older buildings on Main Street
- High density housing in downtown
- Create a pedestrian friendly downtown with a mix of retail and restaurants that people desire
- Review/update the Main Street Vision and Streetscape Plan and create a schedule for implementation
- Completion of the American Gulch Project in downtown
- Connecting Main Street to the American Gulch
- Develop a trail along the American Gulch
- Expansion of development standards for downtown American Gulch Project
- Parking improvements

### Outdoor Mecca

- Lighted softball fields to attract tournament play
- Complete improvements at the multi-event center (rodeo grounds)
- Designate single-track non-motorized trails
- Create an OHV staging area outside of town
- Complete the trails system for hiking and biking
- Link the trail system with Strawberry, Pine, Star Valley and Rye
- Expand McLane Road to connect with the rodeo grounds
- Expand recreation activities including zip line at Tonto Bridge, and rentals of Segway's, jet skis, paddle boards and kayaks

### Economic Development

- Development of the university campus and the supporting jobs that will be generated
- Creation of a firearms/munitions industry cluster
- Spin off activity generated by the university(s)
- Creation of a business retention program
- Attraction of a resort/conference center to attract small association conventions
- Small performing arts theater
- Completion of the C.C. Cragin pipeline water project
- Banner Payson Medical Center's future investment/expansion in Payson to stem the outflow of healthcare services
- Creation of an incentive program to recruit key business establishments
- Multi-generational recreational center that includes an aquatic center, basketball court, workout area, meeting rooms and kitchen facility
- Establish three economic centers: Main Street, University and the Airport
- Create a regional approach to economic development
- Expansion of tourism

### Workforce and Entrepreneurship Development

- Tap into retirees as angel investors
- Foster entrepreneurial spirit with area youth
- Creation of student internships with local business
- Expand articulation agreements between Payson Unified School District and GCC
- Adjusting the high school and college curriculum to create career pathways
- Raising the bar for education so students are better prepared
- Increase the educational attainment levels
- Creation of entrepreneurship programs at the high school and GCC
- Potential incubator to capture the maker movement
- Expansion of SBDC programs and counseling

### Marketing and Promotion

- Marketing campaigns that are directed at different demographic groups
- Position Payson as an Eco-tourism destination
- Promotion of arts and cultural opportunities
- Continue to promote Payson as a summer getaway and get people to stay overnight
- Promote the trails system to attract hikers and cyclists



## THREATS

### Economic

- Escalating land and housing prices which could deter economic development
- High cost of housing puts pressure on the ability to attract key personnel
- Market competition
- Potential economic downturn
- The growth of online retailing

### Social/Policies

- Resistance to change and maintaining the status quo
- Conflict between the desire of the younger versus the older generation
- Anti-growth campaign
- Waiting for the development of the university before moving ahead on other key economic development initiatives
- Perception of subpar education, which is a deterrent to investors
- Unwillingness to work with and include others
- Drug problem among area youth/workforce
- Aging population and potential demand for specialized programs/services

### Physical

- Increasing traffic congestion along SR 87 connecting to SR 260
- Wildfires



# Appendix B – Cluster Industry Analysis

Description	Payson Regional Employment		Arizona Employment		2009-14 Employment Growth		Payson Regional Payroll 2014	Arizona Payroll 2014	2014 Earnings Per Employee		Payson to Arizona LQ	
	2009	2014	2009	2014	Payson Regional	Arizona			Regional	Arizona	2009	2014
	9,049	10,777	3,192,286	3,463,720	19.1%	8.5%	\$286,803,711	\$155,847,343,761	\$ 26,613	\$ 44,994	1.00	1.00
<b>Agribusiness</b>												
Oilseed farming	0	0	0	0	0.0%	-100.0%	\$0	\$0	\$ -	\$ -	0.00	0.00
Grain farming	0	0	1,708	335	0.0%	-80.4%	\$472	\$2,954,498	\$ 1,015	\$ 8,832	0.00	0.45
Vegetable and melon farming	0	2	3,969	4,856	New	22.3%	\$21,028	\$159,326,004	\$ 10,781	\$ 32,811	0.00	0.13
Fruit farming	0	5	540	1,308	New	142.2%	\$30,218	\$25,103,130	\$ 5,596	\$ 19,195	0.00	1.33
Tree nut farming	1	1	429	533	-43.4%	24.2%	\$10,217	\$25,170,004	\$ 12,345	\$ 47,255	1.20	0.50
Greenhouse, nursery, and floriculture production	13	0	2,601	3,582	-99.7%	37.7%	\$921	\$134,392,822	\$ 22,555	\$ 37,524	1.73	0.00
Tobacco farming	0	0	0	0	0.0%	0.0%	\$0	\$0	\$ -	\$ -	0.00	0.00
Cotton farming	1	0	528	1,098	-100.0%	107.8%	\$0	\$84,094,864	\$ -	\$ 76,595	0.39	0.00
Sugarcane and sugar beet farming	0	0	0	0	0.0%	0.0%	\$0	\$0	\$ -	\$ -	0.00	0.00
All other crop farming	0	4	3,796	4,623	New	21.8%	\$8,660	\$84,791,016	\$ 2,135	\$ 18,341	0.00	0.28
Beef cattle ranching and farming, including feedlots and dual-purpose ranching a	8	33	4,111	8,869	320.3%	115.7%	\$41,647	\$38,277,317	\$ 1,276	\$ 4,316	0.67	1.18
Dairy cattle and milk production	0	0	2,968	2,926	0.0%	-1.4%	\$0	\$71,193,687	\$ -	\$ 24,331	0.00	0.00
Poultry and egg production	0	0	51	48	-18.8%	-6.5%	\$2,121	\$2,515,639	\$ 15,535	\$ 52,877	1.17	0.92
Animal production, except cattle and poultry and eggs	1	3	1,190	1,055	405.6%	-11.4%	\$13,624	\$14,440,728	\$ 5,149	\$ 13,693	0.16	0.81
Commercial fishing	0	0	27	335	0.0%	1138.5%	\$0	\$71,442	\$ -	\$ 213	0.00	0.00
Commercial hunting and trapping	0	18	90	271	0.0%	201.8%	\$5,924	\$152,466	\$ 337	\$ 562	0.00	20.83
Support activities for agriculture and forestry	4	0	14,030	14,790	-93.9%	5.4%	\$7,313	\$391,458,862	\$ 30,987	\$ 26,467	0.10	0.01
Dog and cat food manufacturing	0	0	262	300	0.0%	14.5%	\$0	\$27,486,334	\$ -	\$ 91,753	0.00	0.00
Other animal food manufacturing	0	0	119	129	0.0%	7.9%	\$0	\$5,008,605	\$ -	\$ 38,889	0.00	0.00
Flour milling	0	0	65	87	0.0%	32.9%	\$0	\$5,054,784	\$ -	\$ 58,256	0.00	0.00
Rice milling	0	0	18	0	0.0%	-100.0%	\$0	\$0	\$ -	\$ -	0.00	0.00
Malt manufacturing	0	0	5	5	0.0%	0.0%	\$0	\$600,721	\$ -	\$ 114,105	0.00	0.00
Wet corn milling	0	0	0	0	0.0%	0.0%	\$0	\$0	\$ -	\$ -	0.00	0.00
Soybean and other oilseed processing	0	0	22	82	0.0%	266.3%	\$0	\$7,428,592	\$ -	\$ 90,969	0.00	0.00
Fats and oils refining and blending	0	0	37	8	0.0%	-78.1%	\$0	\$426,537	\$ -	\$ 52,237	0.00	0.00
Breakfast cereal manufacturing	0	0	0	0	0.0%	0.0%	\$0	\$0	\$ -	\$ -	0.00	0.00
Beet sugar manufacturing	0	0	0	0	0.0%	0.0%	\$0	\$0	\$ -	\$ -	0.00	0.00
Sugar cane mills and refining	0	0	0	20	0.0%	0.0%	\$0	\$657,926	\$ -	\$ 33,221	0.00	0.00
Nonchocolate confectionery manufacturing	0	0	30	30	0.0%	0.0%	\$0	\$164,973	\$ -	\$ 5,480	0.00	0.00
Chocolate and confectionery manufacturing from cacao beans	0	0	0	0	0.0%	0.0%	\$0	\$0	\$ -	\$ -	0.00	0.00
Confectionery manufacturing from purchased chocolate	0	0	75	118	0.0%	56.0%	\$0	\$1,616,894	\$ -	\$ 13,751	0.00	0.00
Frozen fruits, juices and vegetables manufacturing	0	0	54	0	0.0%	-100.0%	\$0	\$0	\$ -	\$ -	0.00	0.00
Frozen specialties manufacturing	0	0	94	152	0.0%	62.0%	\$0	\$3,872,465	\$ -	\$ 25,468	0.00	0.00
Canned fruits and vegetables manufacturing	0	0	265	432	0.0%	63.1%	\$0	\$17,861,290	\$ -	\$ 41,335	0.00	0.00
Canned specialties	0	0	53	158	0.0%	201.0%	\$0	\$10,320,154	\$ -	\$ 65,264	0.00	0.00
Dehydrated food products manufacturing	0	0	40	0	0.0%	-100.0%	\$0	\$0	\$ -	\$ -	0.00	0.00
Fluid milk manufacturing	0	0	1,333	1,860	0.0%	39.5%	\$0	\$146,147,903	\$ -	\$ 78,573	0.00	0.00
Creamery butter manufacturing	0	0	50	0	0.0%	-100.0%	\$0	\$0	\$ -	\$ -	0.00	0.00
Cheese manufacturing	0	0	0	85	0.0%	New	\$0	\$1,452,853	\$ -	\$ 17,017	0.00	0.00
Dry, condensed, and evaporated dairy product manufacturing	0	0	759	427	0.0%	-43.8%	\$0	\$35,759,132	\$ -	\$ 83,779	0.00	0.00
Ice cream and frozen dessert manufacturing	0	0	170	93	0.0%	-45.7%	\$0	\$3,973,608	\$ -	\$ 42,930	0.00	0.00
Animal, except poultry, slaughtering	0	0	788	1,350	0.0%	71.3%	\$0	\$55,565,327	\$ -	\$ 41,156	0.00	0.00
Meat processed from carcasses	0	0	698	138	0.0%	-80.3%	\$0	\$3,370,145	\$ -	\$ 24,487	0.00	0.00
Rendering and meat byproduct processing	0	0	66	110	0.0%	66.9%	\$0	\$5,954,074	\$ -	\$ 54,185	0.00	0.00
Poultry processing	0	0	91	0	0.0%	-100.0%	\$0	\$0	\$ -	\$ -	0.00	0.00
Seafood product preparation and packaging	0	0	0	0	0.0%	0.0%	\$0	\$0	\$ -	\$ -	0.00	0.00
Bread and bakery product, except frozen, manufacturing	28	17	2,728	7,277	-38.7%	166.8%	\$686,624	\$234,980,637	\$ 40,030	\$ 32,289	3.62	0.76
Frozen cakes and other pastries manufacturing	2	0.28	175	490	-84.3%	180.1%	\$7,887	\$16,835,545	\$ 27,960	\$ 34,387	3.62	0.19
Cookie and cracker manufacturing	0	0	237	274	0.0%	15.5%	\$0	\$12,971,206	\$ -	\$ 47,416	0.00	0.00
Dry pasta, mixes, and dough manufacturing	0	0	164	141	0.0%	-14.3%	\$0	\$5,716,267	\$ -	\$ 40,655	0.00	0.00
Tortilla manufacturing	0	0	497	485	0.0%	-2.4%	\$0	\$11,860,551	\$ -	\$ 24,471	0.00	0.00

	Payson Regional Employment		Arizona Employment		2009-14 Employment Growth		Payson Regional Payroll 2014	Arizona Payroll 2014	2014 Earnings Per Employee		Payson to Arizona LQ		
	2009	2014	2009	2014	Payson Regional	Arizona			Payson Regional	Arizona		2009	2014
<b>Agribusiness (Continued)</b>													
Roasted nuts and peanut butter manufacturing	0	0	0	172	87	0.0%	-49.6%	\$0	\$4,496,297	\$	51,803	0.00	
Other snack food manufacturing	0	0	0	517	780	0.0%	51.0%	\$0	\$46,408,077	\$	59,477	0.00	
Coffee and tea manufacturing	0	0	0	59	148	0.0%	149.6%	\$0	\$4,197,263	\$	28,396	0.00	
Flavoring syrup and concentrate manufacturing	0	0	0	17	8	0.0%	-49.5%	\$0	\$176,246	\$	21,020	0.00	
Mayonnaise, dressing, and sauce manufacturing	0	0	0	60	32	0.0%	-45.7%	\$0	\$848,886	\$	26,165	0.00	
Spice and extract manufacturing	0	0	0	119	52	0.0%	-56.3%	\$0	\$159,762	\$	3,064	0.00	
All other food manufacturing	0	0	0	930	1,974	0.0%	112.2%	\$0	\$64,834,900	\$	32,851	0.00	
Bottled and canned soft drinks & water	0	0	0	3,272	3,112	0.0%	-4.9%	\$0	\$203,893,814	\$	65,524	0.00	
Manufactured ice	0	0	0	175	262	0.0%	49.2%	\$0	\$8,786,765	\$	33,560	0.00	
Breweries	0	0	0	21	196	0.0%	838.3%	\$0	\$4,073,021	\$	20,827	0.00	
Wineries	0	3	0	92	208	New	125.3%	\$0	\$3,911,258	\$	18,794	0.00	
Distilleries	0	0	0	0	13	0.0%	New	\$0	\$571,068	\$	45,157	0.00	
Tobacco product manufacturing	0	0	0	12	21	0.0%	69.7%	\$0	\$14,014	\$	665	0.00	
Nitrogenous fertilizer manufacturing	0	0	0	135	228	0.0%	69.6%	\$0	\$19,486,605	\$	85,389	0.00	
Phosphatic fertilizer manufacturing	0	0	0	131	0	0.0%	-100.0%	\$0	\$0	\$	-	0.00	
Fertilizer mixing	0	0	0	48	233	0.0%	386.0%	\$0	\$10,793,301	\$	46,288	0.00	
Pesticide and other agricultural chemical manufacturing	0	0	0	249	102	0.0%	-59.0%	\$0	\$6,013,143	\$	58,955	0.00	
<b>Arts, Entertainment, Recreation and Visitor Industries</b>													
Retail - Motor vehicle and parts dealers	89	68	39,543	30,832		-23.9%	-22.0%	\$2,228,835	\$1,590,972,290	\$	32,974	0.79	
Retail - Furniture and home furnishings stores	18	13	11,065	11,640		-27.3%	5.2%	\$192,578	\$406,533,386	\$	14,719	0.57	
Retail - Electronics and appliance stores	21	21	13,132	12,884		-3.3%	-1.9%	\$564,001	\$572,633,118	\$	27,273	0.57	
Retail - Building material and garden equipment and supplies stores	205	184	22,680	25,187		-10.4%	11.1%	\$4,693,482	\$867,772,095	\$	25,556	3.19	
Retail - Food and beverage stores	206	195	59,470	52,295		-5.7%	-12.1%	\$5,180,464	\$1,630,873,169	\$	26,627	1.22	
Retail - Health and personal care stores	45	83	21,879	23,604		84.7%	7.9%	\$2,249,691	\$975,426,270	\$	26,953	0.73	
Retail - Gasoline stores	86	67	16,064	17,548		-22.8%	9.2%	\$1,522,755	\$452,925,262	\$	22,834	1.90	
Retail - Clothing and clothing accessories stores	32	70	25,803	27,531		121.8%	6.7%	\$750,787	\$519,857,178	\$	10,668	0.43	
Retail - Sporting goods, hobby, musical instrument and book stores	11	44	14,737	14,716		309.4%	-0.1%	\$378,257	\$289,286,652	\$	8,651	0.26	
Retail - General merchandise stores	358	364	62,718	63,718		1.7%	1.6%	\$10,052,427	\$1,771,343,018	\$	27,638	2.01	
Retail - Miscellaneous store retailers	61	96	33,695	35,160		55.9%	4.3%	\$471,873	\$634,331,421	\$	4,930	0.64	
Retail - Nonstore retailers	66	246	39,997	44,721		269.5%	11.8%	\$676,858	\$966,058,838	\$	2,755	0.59	
Scenic and sightseeing transportation and support activities for transportation	54	25	11,340	13,560		-53.7%	19.6%	\$1,100,357	\$671,927,856	\$	44,354	1.67	
Motion picture and video industries	13	0	5,202	6,144		-100.0%	18.1%	\$0	\$122,041,153	\$	19,864	0.91	
Sound recording industries	0	0	288	508		0.0%	76.5%	\$0	\$14,164,463	\$	27,897	0.00	
Radio and television broadcasting	3	0	3,764	3,972		-100.0%	5.5%	\$0	\$255,631,561	\$	64,360	0.30	
Cable and other subscription programming	0	0	1,178	1,195		0.0%	1.4%	\$0	\$78,218,437	\$	65,442	0.00	
Travel arrangement and reservation services	0	3	8,227	9,585		New	16.5%	\$45,998	\$490,511,292	\$	14,354	0.00	
Performing arts companies	0	0	7,524	3,988		0.0%	-47.0%	\$6,673	\$54,666,134	\$	16,037	0.00	
Commercial Sports Except Racing	0	0	12,465	5,732		0.0%	-54.0%	\$0	\$531,774,719	\$	92,771	0.00	
Racing and Track Operation	0	0	825	705		0.0%	-14.5%	\$0	\$11,113,041	\$	15,768	0.00	
Promoters of performing arts and sports and agents for public figures	0	0	7,610	5,434		0.0%	-28.6%	\$0	\$81,258,591	\$	14,954	0.00	
Independent artists, writers, and performers	12	207	2,006	18,033		1656.4%	798.9%	\$79,771	\$33,369,686	\$	386	2.07	
Museums, historical sites, zoos, and parks	2	4	1,581	2,385		146.3%	50.9%	\$96,391	\$84,081,680	\$	35,254	0.40	
Amusement parks and arcades	5	0	4,971	1,003		-100.0%	-79.8%	\$0	\$12,827,307	\$	12,789	0.36	
Gambling industries (except casino hotels)	8	0	7,712	8,958		-100.0%	16.2%	\$0	\$289,074,066	\$	32,270	0.36	
Other amusement and recreation industries	29	31	11,865	14,517		8.2%	22.4%	\$651,251	\$327,698,608	\$	20,986	0.85	
Fitness and recreational sports centers	17	0	9,672	12,703		-98.2%	31.3%	\$5,148	\$186,031,448	\$	16,037	0.64	
Bowling centers	22	17	950	1,198		-23.9%	26.1%	\$209,029	\$22,178,722	\$	12,312	8.28	
Hotels and motels, including casino hotels	75	70	28,757	30,856		-7.3%	7.3%	\$1,027,037	\$990,818,115	\$	14,757	0.92	
Other accommodations	13	13	3,137	2,307		-4.3%	-26.5%	\$223,680	\$45,461,552	\$	17,420	1.51	
Full-service restaurants	323	404	90,795	98,408		25.2%	8.4%	\$6,996,870	\$2,106,696,045	\$	17,313	1.25	
Limited-service restaurants	343	317	96,543	96,690		-7.5%	0.2%	\$5,292,483	\$1,715,186,401	\$	16,673	1.25	
All other food and drinking places	40	61	11,204	47,213		53.2%	321.4%	\$1,473,153	\$1,073,856,201	\$	24,139	1.25	
Doll, toy, and game manufacturing	0	0	215	158		0.0%	-26.6%	\$0	\$3,309,566	\$	20,954	0.00	

	Payson Regional Employment		Arizona Employment		2009-14 Employment Growth		Payson Regional Payroll 2014	Arizona Payroll 2014	2014 Earnings Per Employee		Payson to Arizona LQ		
	2009	2014	2009	2014	Payson Regional	Arizona			Payson Regional	Arizona		Regional	Arizona
<b>Business and Financial Services</b>													
Monetary authorities and depository credit intermediation	70	57	30,934	41,394	-18.7%	33.8%	\$2,477,354	\$3,083,327,637	\$ 43,743	\$ 74,487	0.79	0.44	
Nondepository credit intermediation and related activities	9	9	44,059	42,834	3.4%	-2.8%	\$322,396	\$2,950,134,521	\$ 35,472	\$ 68,874	0.07	0.07	
Securities and commodity contracts intermediation and brokerage	50	13	21,842	15,736	-74.7%	-28.0%	\$294,404	\$1,344,302,124	\$ 23,022	\$ 85,426	0.81	0.26	
Other financial investment activities	61	187	26,517	51,441	205.7%	94.0%	\$766,616	\$859,564,209	\$ 4,095	\$ 16,710	0.81	1.17	
Insurance carriers	8	0	23,015	24,192	-97.9%	5.1%	\$8,852	\$1,928,667,236	\$ 50,680	\$ 79,723	0.13	0.00	
Insurance agencies, brokerages, and related activities	59	80	24,184	31,155	35.4%	28.8%	\$1,652,310	\$1,380,308,472	\$ 20,606	\$ 44,305	0.86	0.83	
Funds, trusts, and other financial vehicles	6	46	9,547	14,516	632.0%	52.0%	\$1,190,666	\$245,583,191	\$ 26,114	\$ 16,918	0.23	1.01	
Real estate	237	942	181,125	197,209	297.0%	8.9%	\$1,452,499	\$1,827,297,974	\$ 1,542	\$ 9,266	0.46	1.53	
Lessors of nonfinancial intangible assets	1	8	2,141	2,787	1099.9%	30.2%	N/D	\$140,839,966	N/D	\$ 50,536	0.11	0.93	
Legal services	16	54	27,862	23,625	237.5%	-15.2%	\$864,770	\$1,585,756,958	\$ 16,017	\$ 67,121	0.20	0.73	
Accounting, tax preparation, bookkeeping, and payroll services	21	100	29,312	26,077	387.0%	-11.0%	\$490,829	\$965,847,229	\$ 4,904	\$ 37,038	0.25	1.23	
Architectural, engineering, and related services	10	13	39,872	30,193	37.3%	-24.3%	\$183,295	\$2,593,354,004	\$ 14,026	\$ 85,893	0.08	0.14	
Specialized design services	1	0	3,092	5,950	-100.0%	92.4%	\$0	\$79,799,202	\$ -	\$ 13,412	0.13	0.00	
Management consulting services	47	83	29,761	31,712	77.9%	6.6%	\$661,967	\$1,417,856,934	\$ 7,996	\$ 44,711	0.55	0.84	
Environmental and other technical consulting services	0	23	2,784	5,518	New	98.2%	\$35,477	\$248,288,651	\$ 1,565	\$ 44,995	0.00	1.32	
Advertising, public relations, and related services	3	36	11,777	11,600	1207.9%	-1.5%	\$3,097,585	\$464,280,121	\$ 86,297	\$ 40,025	0.08	0.99	
Photographic services	0	23	1,715	3,563	New	107.8%	\$4,684	\$24,459,818	\$ 206	\$ 6,865	0.00	2.05	
Marketing research and all other miscellaneous professional, scientific, and tech	0	28	7,440	24,645	New	231.2%	\$12,388	\$281,748,047	\$ 442	\$ 11,432	0.00	0.37	
Management of companies and enterprises	29	47	28,049	34,517	60.4%	23.1%	\$491,730	\$3,275,458,252	\$ 10,551	\$ 94,895	0.37	0.43	
Office administrative services	8	0	14,077	22,326	-100.0%	58.6%	\$0	\$1,375,383,057	\$ -	\$ 61,606	0.19	0.00	
Facilities support services	0	24	7,314	5,437	New	-25.7%	\$594,139	\$249,051,605	\$ 24,768	\$ 45,810	0.00	1.42	
Employment services	33	2	104,267	98,845	-94.1%	-5.2%	\$56,041	\$3,731,644,043	\$ 29,065	\$ 37,753	0.11	0.01	
Business support services	8	62	35,274	43,549	653.9%	23.5%	\$219,428	\$1,324,658,203	\$ 3,520	\$ 30,418	0.08	0.46	
Investigation and security services	1	49	18,271	19,599	4543.4%	7.3%	\$932,727	\$558,858,459	\$ 19,057	\$ 28,515	0.02	0.80	
Services to buildings	22	154	28,489	47,712	609.5%	67.5%	\$537,432	\$716,834,595	\$ 3,496	\$ 15,024	0.27	1.04	
Landscape and horticultural services	15	158	19,593	26,140	959.6%	33.4%	\$547,736	\$546,194,275	\$ 3,469	\$ 20,895	0.27	1.94	
Other support services	36	46	3,594	6,738	26.3%	87.5%	\$52,041	\$168,133,270	\$ 1,130	\$ 24,954	3.58	2.20	
Waste management and remediation services	56	16	4,851	5,962	-71.7%	22.9%	\$694,713	\$389,372,314	\$ 44,134	\$ 65,307	4.04	0.85	
<b>Construction</b>													
Construction of new health care structures	21	18	7,298	6,686	-14.4%	-8.4%	\$387,564	\$265,886,322	\$ 21,779	\$ 39,765	1.00	0.86	
Construction of new manufacturing structures	39	19	12,514	8,412	-52.3%	-32.8%	\$574,210	\$388,627,411	\$ 30,569	\$ 46,197	1.11	0.72	
Construction of new power and communication structures	76	85	26,450	15,535	12.7%	-41.3%	\$3,838,763	\$581,835,754	\$ 45,090	\$ 37,452	1.01	1.76	
Construction of new educational and vocational structures	39	25	13,722	8,062	-36.2%	-41.2%	\$391,673	\$269,507,050	\$ 15,708	\$ 33,429	1.00	0.99	
Construction of new highways and streets	57	30	19,902	11,416	-47.4%	-42.6%	\$671,726	\$460,834,198	\$ 22,476	\$ 40,369	1.01	0.84	
Construction of new commercial structures, including farm structures	58	31	20,324	12,485	-46.1%	-38.6%	\$850,523	\$531,826,965	\$ 27,265	\$ 42,597	1.00	0.80	
Construction of other new nonresidential structures	57	86	19,838	32,264	52.7%	62.6%	\$1,927,564	\$1,269,526,001	\$ 22,293	\$ 39,347	1.01	0.86	
Construction of new single-family residential structures	36	65	17,332	24,447	81.3%	41.1%	\$1,235,687	\$875,286,438	\$ 19,021	\$ 35,803	0.73	0.85	
Construction of new multifamily residential structures	4	13	1,815	4,838	254.3%	166.5%	\$273,600	\$187,072,876	\$ 20,572	\$ 38,670	0.73	0.88	
Construction of other new residential structures	36	75	17,208	14,758	111.5%	-14.2%	\$130,869	\$89,481,438	\$ 1,739	\$ 6,063	0.73	1.64	
Maintenance and repair construction of nonresidential structures	57	76	18,714	26,963	34.1%	44.1%	\$1,473,853	\$1,011,130,127	\$ 19,357	\$ 37,501	1.07	0.91	
Maintenance and repair construction of residential structures	19	27	9,343	10,086	41.9%	8.0%	\$576,974	\$394,503,235	\$ 21,052	\$ 39,113	0.73	0.87	
Maintenance and repair construction of highways, streets, bridges, and tunnels	10	21	3,159	7,507	121.2%	137.7%	\$410,341	\$281,512,695	\$ 19,357	\$ 37,501	1.07	0.91	
<b>Education and Knowledge Creation</b>													
Periodical publishers	0	0	1,720	1,676	0.0%	-2.6%	\$0	\$87,119,911	\$ -	\$ 51,985	0.00	0.00	
Book publishers	0	4	345	535	New	55.2%	\$69,514	\$21,277,378	\$ 16,560	\$ 39,751	0.00	2.52	
Elementary and secondary schools	33	34	20,638	22,843	1.3%	10.7%	\$767,297	\$827,074,524	\$ 22,819	\$ 36,207	0.57	0.47	
Junior colleges, colleges, universities, and professional schools	0	0	20,606	16,030	0.0%	-22.2%	\$0	\$924,431,152	\$ -	\$ 57,668	0.00	0.00	
Other educational services	20	9	17,790	28,494	-53.8%	60.2%	\$64,834	\$873,301,636	\$ 7,203	\$ 30,648	0.39	0.10	
Employment and payroll of state govt, education	151	0	43,410	33,675	-100.0%	-22.4%	\$0	\$1,769,633,179	\$ -	\$ 52,550	1.23	0.00	
Employment and payroll of local govt, education	476	504	136,953	145,576	5.9%	6.3%	\$26,287,670	\$8,056,705,078	\$ 52,182	\$ 55,344	1.23	1.11	

	Payson Regional Employment		Arizona Employment		2009-14 Employment Growth		Payson Regional Payroll 2014	Arizona Payroll 2014	2014 Earnings Per Employee		Payson to Arizona LQ		
	2009	2014	2009	2014	Payson Regional	Arizona			Payson Regional	Arizona		Payson	
												2009	2014
<b>Energy</b>													
Extraction of natural gas and crude petroleum	3	16	3,389	4,551	428.8%	34.3%	\$0	\$7,138,968	\$ -	\$ 1,569	0.31		
Extraction of natural gas liquids	0	0	118	1,906	0.0%	1513.9%	\$0	\$1,109,404	\$ -	\$ 582	0.00		
Coal mining	0	0	600	402	0.0%	-32.9%	\$0	\$42,646,652	\$ -	\$ 105,979	0.00		
Drilling oil and gas wells	0	3	190	1,186	New	523.5%	\$0	\$17,307,039	\$ -	\$ 14,591	0.00		
Support activities for oil and gas operations	13	5	1,023	556	-61.8%	-45.6%	\$40,426	\$10,560,135	\$ 8,310	\$ 18,986	4.39		
Other nonmetallic minerals services	0	0	85	149	0.0%	76.1%	\$0	\$15,728,785	\$ -	\$ 105,558	0.00		
Electric power generation - Hydroelectric	0	0	156	0	0.0%	-100.0%	\$0	\$0	\$ -	\$ -	0.00		
Electric power generation - Fossil fuel	0	0	2,380	1,482	0.0%	-37.7%	\$0	\$262,504,639	\$ -	\$ 177,104	0.00		
Electric power generation - Nuclear	0	0	1,469	4	0.0%	-99.7%	\$0	\$1,015,952	\$ -	\$ 257,844	0.00		
Electric power generation - Solar	0	0	18	94	0.0%	427.6%	\$0	\$15,770,143	\$ -	\$ 168,628	0.00		
Electric power generation - Wind	0	0	73	28	0.0%	-61.8%	\$0	\$4,094,002	\$ -	\$ 146,366	0.00		
Electric power generation - Geothermal	0	0	26	0	0.0%	-100.0%	\$0	\$0	\$ -	\$ -	0.00		
Electric power generation - Biomass	0	0	25	28	0.0%	11.7%	\$0	\$2,274,647	\$ -	\$ 80,318	0.00		
Electric power generation - All other	0	0	23	59	0.0%	151.5%	\$0	\$9,005,846	\$ -	\$ 153,751	0.00		
Electric power transmission and distribution	0	0	5,140	7,265	0.0%	41.3%	\$0	\$1,076,939,453	\$ -	\$ 148,241	0.00		
Natural gas distribution	0	32	1,316	1,262	New	-4.1%	\$2,104,944	\$125,270,416	\$ 66,673	\$ 99,257	0.00		
Water, sewage and other systems	2	10	1,875	2,380	420.5%	26.9%	\$548,622	\$170,485,291	\$ 55,715	\$ 71,635	0.36		
Petroleum refineries	0	0	13	18	0.0%	37.6%	\$0	\$1,105,841	\$ -	\$ 61,136	0.00		
Pipeline transportation	0	0	256	282	0.0%	10.2%	\$9,205	\$34,100,456	\$ 66,667	\$ 121,121	0.16		
Federal electric utilities	0	0	0	0	0.0%	0.0%	\$0	\$0	\$ -	\$ -	0.00		
Local government electric utilities	0	0	198	5,461	0.0%	2654.0%	\$0	\$661,999,512	\$ -	\$ 121,226	0.00		
<b>Healthcare and Biomedical</b>													
Offices of physicians	206	195	63,072	58,531	-5.7%	-7.2%	\$9,992,429	\$5,368,573,730	\$ 51,360	\$ 91,722	1.15		
Offices of dentists	54	78	16,556	20,206	43.7%	22.0%	\$2,793,295	\$1,011,384,460	\$ 35,867	\$ 50,053	1.15		
Offices of other health practitioners	42	128	12,740	25,641	207.7%	101.3%	\$1,510,110	\$728,640,442	\$ 11,772	\$ 28,417	1.15		
Outpatient care centers	31	22	18,774	23,444	-31.0%	24.9%	\$646,808	\$1,504,564,575	\$ 29,941	\$ 64,177	0.59		
Medical and diagnostic laboratories	14	0	8,488	7,475	-100.0%	-11.9%	\$0	\$474,300,232	\$ -	\$ 63,456	0.59		
Home health care services	22	39	23,157	25,916	81.5%	11.9%	\$206,516	\$725,829,102	\$ 5,238	\$ 28,007	0.33		
Other ambulatory health care services	12	40	7,391	10,079	226.8%	36.4%	\$590,564	\$531,109,070	\$ 14,661	\$ 52,693	0.59		
Hospitals	288	199	74,157	89,028	-31.1%	20.1%	\$13,984,051	\$6,311,101,563	\$ 70,447	\$ 70,889	1.37		
Nursing and community care facilities	206	382	34,119	37,908	85.7%	11.1%	\$13,399,005	\$1,270,765,991	\$ 35,111	\$ 33,522	2.13		
Residential mental retardation, mental health, substance abuse and other facilities	51	50	8,518	15,078	-2.2%	77.0%	\$1,803,115	\$495,212,402	\$ 35,948	\$ 32,843	2.13		
Medicinal and botanical manufacturing	0	0	100	108	0.0%	7.6%	\$0	\$5,551,735	\$ -	\$ 51,606	0.00		
Pharmaceutical preparation manufacturing	0	0	956	1,495	0.0%	56.4%	\$0	\$102,891,098	\$ -	\$ 68,802	0.00		
In-vitro diagnostic substance manufacturing	0	0	7	13	0.0%	86.1%	\$0	\$2,597,082	\$ -	\$ 200,871	0.00		
Biological product (except diagnostic) manufacturing	0	0	27	37	0.0%	38.9%	\$0	\$7,723,174	\$ -	\$ 207,974	0.00		
Dental laboratories	0	0	1,242	1,099	0.0%	-11.5%	\$0	\$46,254,658	\$ -	\$ 42,090	0.00		
Scientific research and development services	2	0	7,456	24,987	-100.0%	235.1%	\$0	\$2,114,311,279	\$ -	\$ 84,617	0.12		
Veterinary services	67	43	8,924	6,733	-35.7%	-24.5%	\$1,103,218	\$264,815,796	\$ 25,421	\$ 39,329	2.67		
<b>Software and Information Technology</b>													
Software and other prerecorded and record reproducing	0	0	154	43	0.0%	-72.3%	\$0	\$2,222,164	\$ -	\$ 51,991	0.00		
Software publishers	0	0	3,430	4,096	0.0%	19.4%	\$0	\$319,924,347	\$ -	\$ 78,107	0.00		
Wired telecommunications carriers	8	12	10,290	11,060	46.9%	7.5%	\$209,767	\$884,893,555	\$ 17,620	\$ 80,007	0.28		
Wireless telecommunications carriers (except satellite)	5	0	6,294	5,351	-100.0%	-15.0%	\$0	\$312,900,116	\$ -	\$ 58,473	0.28		
Satellite, telecommunications resellers, and all other telecommunications	1	0	1,032	2,240	-100.0%	117.1%	\$0	\$150,969,650	\$ -	\$ 67,383	0.28		
Data processing, hosting, and related services	0	18	5,060	11,602	New	129.3%	\$742,826	\$979,783,203	\$ 41,589	\$ 84,453	0.00		
Custom computer programming services	17	49	23,985	21,557	190.5%	-10.1%	\$1,191,847	\$1,663,100,464	\$ 24,507	\$ 77,150	0.25		
Computer systems design services	3	24	17,303	13,688	608.1%	-20.9%	\$195,389	\$1,051,510,010	\$ 8,142	\$ 76,820	0.07		
Other computer related services, including facilities management	1	8	3,195	7,991	647.1%	150.1%	\$108,922	\$574,434,753	\$ 13,766	\$ 71,885	0.12		

	Payson Regional Employment		Arizona Employment		2009-14 Employment Growth		Payson Regional Payroll 2014	Arizona Payroll 2014	2014 Earnings Per Employee		Payson to Arizona LQ		
	2009	2014	2009	2014	Payson Regional	Arizona			Payson Regional	Arizona		Payson	
												Regional	Arizona
<b>Manufacturing Super Cluster</b>													
<b>Machinery Manufacturing</b>													
Farm machinery and equipment manufacturing	0	0	0	364	233	0.0%	-36.0%	\$0	\$22,473,286	\$ -	\$ 96,423	0.00	
Lawn and garden equipment manufacturing	0	0	0	292	255	0.0%	-12.6%	\$0	\$16,798,504	\$ -	\$ 65,820	0.00	
Construction machinery manufacturing	0	0	0	324	422	0.0%	30.4%	\$0	\$33,459,084	\$ -	\$ 79,287	0.00	
Mining machinery and equipment manufacturing	0	0	0	10	156	0.0%	1470.5%	\$0	\$8,234,070	\$ -	\$ 52,860	0.00	
Oil and gas field machinery and equipment manufacturing	0	0	0	74	3	0.0%	-96.0%	\$0	\$35,283	\$ -	\$ 11,886	0.00	
Food product machinery manufacturing	0	0	0	47	8	0.0%	-82.3%	\$0	\$345,598	\$ -	\$ 41,885	0.00	
Semiconductor machinery manufacturing	0	0	0	533	804	0.0%	51.0%	\$0	\$105,862,137	\$ -	\$ 131,602	0.00	
Sawmill, woodworking, and paper machinery	0	0	0	10	28	0.0%	181.4%	\$0	\$751,722	\$ -	\$ 26,922	0.00	
Printing machinery and equipment manufacturing	0	0	0	30	71	0.0%	134.9%	\$0	\$3,648,713	\$ -	\$ 51,319	0.00	
All other industrial machinery manufacturing	0	7	0	286	212	New	-26.0%	\$0	\$10,434,533	\$ -	\$ 49,302	0.00	
Optical instrument and lens manufacturing	0	0	0	1,052	510	0.0%	-51.6%	\$0	\$48,019,814	\$ -	\$ 94,175	0.00	
Photographic and photocopying equipment manufacturing	0	0	0	78	65	0.0%	-16.5%	\$0	\$6,263,258	\$ -	\$ 96,517	0.00	
Other commercial service industry machinery manufacturing	0	0	0	480	513	0.0%	7.0%	\$0	\$26,216,345	\$ -	\$ 51,080	0.00	
Air purification and ventilation equipment manufacturing	0	0	0	117	175	0.0%	49.1%	\$0	\$12,686,861	\$ -	\$ 72,491	0.00	
Heating equipment (except warm air furnaces) manufacturing	0	0	0	24	34	0.0%	38.7%	\$0	\$887,699	\$ -	\$ 26,141	0.00	
Air conditioning, refrigeration, and warm air heating equipment manufacturing	0	0	0	903	706	0.0%	-21.8%	\$0	\$38,854,164	\$ -	\$ 55,028	0.00	
Industrial mold manufacturing	0	0	0	364	330	0.0%	-9.4%	\$0	\$18,068,472	\$ -	\$ 54,706	0.00	
Special tool, die, jig, and fixture manufacturing	0	0	0	414	379	0.0%	-8.4%	\$0	\$19,016,876	\$ -	\$ 50,127	0.00	
Cutting tool and machine tool accessory manufacturing	0	0	0	97	165	0.0%	69.8%	\$0	\$7,124,203	\$ -	\$ 43,294	0.00	
Machine tool manufacturing	0	0	0	631	754	0.0%	19.5%	\$0	\$49,863,674	\$ -	\$ 66,145	0.00	
Rolling mill and other metalworking machinery manufacturing	0	0	0	123	65	0.0%	-47.1%	\$0	\$2,614,454	\$ -	\$ 40,316	0.00	
Turbine and turbine generator set units manufacturing	0	0	0	165	213	0.0%	29.3%	\$0	\$13,581,859	\$ -	\$ 63,677	0.00	
Speed changer, industrial high-speed drive, and gear manufacturing	0	0	0	29	14	0.0%	-52.6%	\$0	\$394,676	\$ -	\$ 28,705	0.00	
Mechanical power transmission equipment manufacturing	0	0	0	0	0	0.0%	0.0%	\$0	\$0	\$ -	\$ -	0.00	
Other engine equipment manufacturing	0	0	0	11	28	0.0%	157.9%	\$0	\$1,071,356	\$ -	\$ 37,863	0.00	
Pump and pumping equipment manufacturing	0	0	0	46	122	0.0%	163.5%	\$0	\$8,932,774	\$ -	\$ 73,489	0.00	
Air and gas compressor manufacturing	0	0	0	0	0	0.0%	0.0%	\$0	\$0	\$ -	\$ -	0.00	
Measuring and dispensing pump manufacturing	0	0	0	4	0	0.0%	-100.0%	\$0	\$0	\$ -	\$ -	0.00	
Elevator and moving stairway manufacturing	0	0	0	17	0	0.0%	-100.0%	\$0	\$0	\$ -	\$ -	0.00	
Conveyor and conveying equipment manufacturing	0	0	0	60	150	0.0%	151.0%	\$0	\$7,046,525	\$ -	\$ 47,071	0.00	
Overhead cranes, hoists, and monorail systems manufacturing	0	0	0	27	7	0.0%	-73.3%	\$0	\$197,296	\$ -	\$ 26,910	0.00	
Industrial truck, trailer, and stacker manufacturing	0	0	0	39	48	0.0%	23.5%	\$0	\$947,423	\$ -	\$ 19,881	0.00	
Power-driven handtool manufacturing	0	0	0	5	5	0.0%	0.0%	\$0	\$66,960	\$ -	\$ 13,392	0.00	
Welding and soldering equipment manufacturing	0	0	0	21	24	0.0%	13.2%	\$0	\$633,874	\$ -	\$ 26,209	0.00	
Packaging machinery manufacturing	0	0	0	8	19	0.0%	136.2%	\$0	\$111,826	\$ -	\$ 5,972	0.00	
Industrial process furnace and oven manufacturing	0	0	0	12	0	0.0%	-100.0%	\$0	\$0	\$ -	\$ -	0.00	
Fluid power cylinder and actuator manufacturing	0	0	0	29	49	0.0%	71.6%	\$0	\$2,338,730	\$ -	\$ 47,755	0.00	
Fluid power pump and motor manufacturing	0	0	0	41	3	0.0%	-92.4%	\$0	\$86,140	\$ -	\$ 27,822	0.00	
Scales, balances, and miscellaneous general purpose machinery manufacturing	0	0	0	57	261	0.0%	354.6%	\$0	\$12,558,372	\$ -	\$ 48,099	0.00	
<b>Primary Metals Manufacturing</b>													
Iron and steel mills and ferroalloy manufacturing	0	0	0	183	335	0.0%	82.8%	\$0	\$22,947,176	\$ -	\$ 68,503	0.00	
Iron, steel pipe and tube manufacturing from purchased steel	0	0	0	152	232	0.0%	52.9%	\$0	\$12,455,845	\$ -	\$ 53,599	0.00	
Rolled steel shape manufacturing	0	0	0	156	116	0.0%	-25.6%	\$0	\$7,874,865	\$ -	\$ 67,718	0.00	
Steel wire drawing	0	0	0	55	136	0.0%	148.6%	\$0	\$6,519,275	\$ -	\$ 48,082	0.00	
Alumina refining and primary aluminum production	0	0	0	102	288	0.0%	183.6%	\$0	\$21,901,863	\$ -	\$ 75,931	0.00	
Secondary smelting and alloying of aluminum	0	0	0	0	0	0.0%	0.0%	\$0	\$0	\$ -	\$ -	0.00	
Aluminum sheet, plate, and foil manufacturing	0	0	0	235	65	0.0%	-72.5%	\$0	\$4,052,067	\$ -	\$ 62,787	0.00	
Other aluminum rolling, drawing and extruding	0	0	0	468	512	0.0%	9.3%	\$0	\$33,597,824	\$ -	\$ 65,611	0.00	
Nonferrous metal (exc aluminum) smelting and refining	303	0	0	633	1,683	-100.0%	165.9%	\$0	\$160,374,710	\$ -	\$ 95,298	168.80	
Copper rolling, drawing, extruding and alloying	0	0	0	170	99	0.0%	-41.9%	\$0	\$6,702,743	\$ -	\$ 68,040	0.00	
Nonferrous metal, except copper and aluminum, shaping	8	0	0	112	37	-100.0%	-67.2%	\$0	\$1,725,822	\$ -	\$ 46,912	24.34	
Secondary processing of other nonferrous metals	6	0	0	86	110	-100.0%	27.7%	\$0	\$6,913,421	\$ -	\$ 62,725	24.34	



	Payson Regional Employment		Arizona Employment		2009-14 Employment Growth		Payson Regional Payroll 2014	Arizona Payroll 2014	2014 Earnings Per Employee		Payson to Arizona LQ		
	2009	2014	2009	2014	Payson Regional	Arizona			Payson Regional	Arizona		2009	2014
<b>Manufacturing Super Cluster (Continued)</b>													
Ferrous metal foundries	0	0	0	1,043	441	0.0%	-57.7%	\$0	\$29,140,045	\$ -	\$ 66,003	0.00	
Nonferrous metal foundries	0	0	0	572	819	0.0%	43.2%	\$0	\$42,381,329	\$ -	\$ 51,726	0.00	
<b>Fabricated Metal Product Manufacturing</b>													
Iron and steel forging	0	0	0	17	7	0.0%	-57.5%	\$0	\$236,718	\$ -	\$ 32,757	0.00	
Nonferrous forging	0	0	0	4	0	0.0%	-100.0%	\$0	\$0	\$ -	\$ -	0.00	
Custom roll forming	0	0	0	0	0	0.0%	0.0%	\$0	\$0	\$ -	\$ -	0.00	
Crown and closure manufacturing and metal stamping	0	0	0	657	752	0.0%	14.5%	\$0	\$40,954,536	\$ -	\$ 54,480	0.00	
Cutlery, utensil, pot, and pan manufacturing	0	0	0	54	92	0.0%	70.2%	\$0	\$6,111,956	\$ -	\$ 66,272	0.00	
Handtool manufacturing	0	0	0	190	136	0.0%	-28.5%	\$0	\$5,641,546	\$ -	\$ 41,475	0.00	
Prefabricated metal buildings and components manufacturing	0	0	0	281	522	0.0%	85.6%	\$0	\$46,934,372	\$ -	\$ 89,918	0.41	
Fabricated structural metal manufacturing	1	3	1	902	1,435	158.8%	59.1%	\$101,414	\$73,806,915	\$ 37,371	\$ 51,442	0.41	
Plate work manufacturing	1	0	0	561	516	-100.0%	-8.0%	\$0	\$26,133,457	\$ -	\$ 50,656	0.41	
Metal window and door manufacturing	0	0	0	1,028	1,710	0.0%	66.4%	\$0	\$88,206,459	\$ -	\$ 51,592	0.00	
Sheet metal work manufacturing	0	0	0	2,212	2,573	0.0%	16.3%	\$0	\$138,186,829	\$ -	\$ 53,711	0.00	
Ornamental and architectural metal work manufacturing	0	0	0	759	964	0.0%	26.9%	\$0	\$38,370,590	\$ -	\$ 39,821	0.00	
Power boiler and heat exchanger manufacturing	0	0	0	45	66	0.0%	45.5%	\$0	\$5,131,676	\$ -	\$ 77,566	0.00	
Metal tank (heavy gauge) manufacturing	0	0	0	84	94	0.0%	10.8%	\$0	\$5,143,102	\$ -	\$ 54,953	0.00	
Metal cans manufacturing	0	0	0	332	353	0.0%	6.2%	\$0	\$27,952,641	\$ -	\$ 79,247	0.00	
Metal barrels, drums and pails manufacturing	0	0	0	177	91	0.0%	-48.7%	\$0	\$4,116,242	\$ -	\$ 45,433	0.00	
Hardware manufacturing	0	0	0	39	82	0.0%	111.5%	\$0	\$4,336,419	\$ -	\$ 53,119	0.00	
Spring and wire product manufacturing	0	0	0	416	308	0.0%	-26.1%	\$0	\$13,886,948	\$ -	\$ 45,115	0.00	
Machine shops	13	14	13	3,550	4,454	12.3%	25.5%	\$506,744	\$244,117,859	\$ 35,833	\$ 54,805	1.25	
Turned product and screw, nut, and bolt manufacturing	0	0	0	285	358	0.0%	25.7%	\$0	\$17,360,632	\$ -	\$ 48,470	0.00	
Valve and fittings, other than plumbing, manufacturing	0	0	0	968	1,984	0.0%	105.0%	\$0	\$159,749,390	\$ -	\$ 80,501	0.00	
Plumbing fixture fitting and trim manufacturing	0	0	0	8	8	0.0%	0.0%	\$0	\$273,144	\$ -	\$ 34,143	0.00	
Ball and roller bearing manufacturing	0	0	0	4	0	0.0%	-100.0%	\$0	\$0	\$ -	\$ -	0.00	
Fabricated pipe and pipe fitting manufacturing	0	0	0	56	68	0.0%	21.8%	\$0	\$2,207,075	\$ -	\$ 32,523	0.00	
Other fabricated metal manufacturing	0	0	0	404	814	0.0%	101.5%	\$0	\$44,647,015	\$ -	\$ 54,817	0.00	
<b>Transportation Equipment Manufacturing</b>													
Automobile manufacturing	0	0	0	19	38	0.0%	95.1%	\$0	\$4,592,264	\$ -	\$ 122,078	0.00	
Light truck and utility vehicle manufacturing	0	0	0	1	8	0.0%	522.7%	\$0	\$919,966	\$ -	\$ 114,785	0.00	
Heavy duty truck manufacturing	0	0	0	116	125	0.0%	8.2%	\$0	\$11,927,156	\$ -	\$ 95,178	0.00	
Motor vehicle body manufacturing	0	0	0	150	67	0.0%	-55.4%	\$0	\$2,685,679	\$ -	\$ 40,056	0.00	
Truck trailer manufacturing	0	0	0	183	64	0.0%	-64.8%	\$0	\$2,392,359	\$ -	\$ 37,197	0.00	
Motor home manufacturing	0	0	0	9	144	0.0%	1479.6%	\$0	\$8,057,648	\$ -	\$ 56,116	0.00	
Travel trailer and camper manufacturing	0	0	0	104	131	0.0%	25.5%	\$0	\$5,335,221	\$ -	\$ 40,832	0.00	
Motor vehicle gasoline engine and engine parts manufacturing	0	0	0	292	169	0.0%	-42.1%	\$0	\$16,535,479	\$ -	\$ 97,880	0.00	
Motor vehicle electrical and electronic component manufacturing	0	0	0	194	182	0.0%	-6.0%	\$0	\$9,723,218	\$ -	\$ 53,321	0.00	
Motor vehicle steering, suspension component (except spring), and brake system	0	0	0	258	474	0.0%	83.3%	\$0	\$18,025,459	\$ -	\$ 38,050	0.00	
Motor vehicle transmission and power train parts manufacturing	0	0	0	429	108	0.0%	-74.9%	\$0	\$6,429,156	\$ -	\$ 59,788	0.00	
Motor vehicle seating and interior trim manufacturing	0	0	0	283	1,011	0.0%	257.0%	\$0	\$74,000,526	\$ -	\$ 73,226	0.00	
Motor vehicle metal stamping	0	0	0	280	4	0.0%	-98.4%	\$0	\$180,081	\$ -	\$ 41,037	0.00	
Other motor vehicle parts manufacturing	0	0	0	639	915	0.0%	43.2%	\$0	\$57,655,762	\$ -	\$ 63,042	0.00	
Aircraft manufacturing	0	0	0	4,484	5,185	0.0%	15.6%	\$0	\$641,789,307	\$ -	\$ 123,777	0.00	
Aircraft engine and engine parts manufacturing	0	0	0	8,155	5,184	0.0%	-36.4%	\$0	\$600,324,219	\$ -	\$ 115,808	0.00	
Other aircraft parts and auxiliary equipment manufacturing	158	0	0	3,357	3,746	-100.0%	11.6%	\$0	\$330,169,037	\$ -	\$ 88,134	16.64	
Propulsion units and parts for space vehicles and guided missiles manufacturing	0	0	0	249	1,703	0.0%	584.7%	\$0	\$189,988,220	\$ -	\$ 111,578	0.00	
Railroad rolling stock manufacturing	0	0	0	15	58	0.0%	293.9%	\$0	\$3,266,641	\$ -	\$ 56,137	0.00	
Ship building and repairing	0	0	0	0	0	0.0%	0.0%	\$0	\$0	\$ -	\$ -	0.00	
Boat building	0	0	0	104	109	0.0%	4.2%	\$0	\$4,008,957	\$ -	\$ 36,846	0.00	
Motorcycle, bicycle, and parts manufacturing	0	0	0	164	105	0.0%	-36.0%	\$0	\$3,511,680	\$ -	\$ 33,360	0.00	
All other transportation equipment manufacturing	0	0	0	24	41	0.0%	72.8%	\$0	\$1,403,057	\$ -	\$ 34,515	0.00	

	Payson Regional Employment		Arizona Employment		2009-14 Employment Growth		Payson Regional Payroll 2014	Arizona Payroll 2014	2014 Earnings Per Employee		Payson to Arizona LQ			
	2009	2014	2009	2014	Payson Regional	Arizona			Payson Regional	Arizona	Payson Regional	Arizona	2009	2014
<b>Manufacturing Super Cluster (Continued)</b>														
<b>Computer and Electronic Product Manufacturing</b>														
Electronic computer manufacturing	0	0	0	328	277	0.0%	-15.7%	\$0	\$32,671,680	\$ -	\$ 118,046	0.00		
Computer storage device manufacturing	0	0	0	27	40	0.0%	49.9%	\$0	\$4,697,303	\$ -	\$ 117,813	0.00		
Computer terminals and other computer peripheral equipment manufacturing	0	0	0	348	178	0.0%	-49.0%	\$0	\$10,768,178	\$ -	\$ 60,660	0.00		
Telephone apparatus manufacturing	0	0	0	62	3	0.0%	-94.7%	\$0	\$124,195	\$ -	\$ 37,834	0.00		
Broadcast and wireless communications equipment manufacturing	0	0	0	916	872	0.0%	-4.8%	\$0	\$86,031,349	\$ -	\$ 98,657	0.00		
Audio and video equipment manufacturing	0	0	0	240	326	0.0%	35.9%	\$0	\$23,489,531	\$ -	\$ 72,010	0.00		
Bare printed circuit board manufacturing	0	0	0	1,387	713	0.0%	-48.6%	\$0	\$47,293,976	\$ -	\$ 66,376	0.00		
Semiconductor and related device manufacturing	0	0	0	18,256	18,595	0.0%	1.9%	\$0	\$2,865,957,275	\$ -	\$ 154,129	0.00		
Capacitor, resistor, coil, transformer, and other inductor manufacturing	92	1	1	248	169	-98.9%	-31.7%	\$96,330	\$7,676,553	\$ 93,661	\$ 45,364	130.50		
Electronic connector manufacturing	0	0	0	514	464	0.0%	-9.6%	\$0	\$28,826,605	\$ -	\$ 62,063	0.00		
Printed circuit assembly (electronic assembly) manufacturing	0	3	3	638	557	New	-12.7%	\$425,390	\$38,880,867	\$ 161,482	\$ 69,750	0.00		
Other electronic component manufacturing	0	0	0	1,302	868	0.0%	-33.3%	\$0	\$67,996,605	\$ -	\$ 78,298	0.00		
Electromedical and electrotherapeutic apparatus manufacturing	0	12	12	772	732	New	-5.2%	\$1,404,653	\$51,959,232	\$ 113,809	\$ 71,001	0.00		
Automatic environmental control manufacturing	0	0	0	245	873	0.0%	256.3%	\$0	\$118,437,752	\$ -	\$ 135,682	0.00		
Industrial process variable instruments manufacturing	0	0	0	453	552	0.0%	21.9%	\$0	\$34,831,829	\$ -	\$ 63,142	0.00		
Totalizing fluid meter and counting device manufacturing	0	0	0	57	342	0.0%	498.5%	\$0	\$42,077,614	\$ -	\$ 122,880	0.00		
Electricity and signal testing instruments manufacturing	0	0	0	844	242	0.0%	-71.3%	\$0	\$21,274,670	\$ -	\$ 87,738	0.00		
Analytical laboratory instrument manufacturing	0	0	0	129	145	0.0%	12.5%	\$0	\$12,182,809	\$ -	\$ 83,748	0.00		
Irradiation apparatus manufacturing	0	0	0	462	49	0.0%	-89.5%	\$0	\$6,261,736	\$ -	\$ 128,651	0.00		
Watch, clock, and other measuring and controlling device manufacturing	0	0	0	335	239	0.0%	-28.5%	\$0	\$11,000,289	\$ -	\$ 45,942	0.00		
Blank magnetic and optical recording media manufacturing	0	0	0	24	66	0.0%	169.2%	\$0	\$3,511,560	\$ -	\$ 53,566	0.00		
<b>Defense and Security</b>														
Uranium-radium-vanadium ore mining	0	0	0	0	53	0.0%	New	\$0	\$2,021,593	\$ -	\$ 37,921	0.00		
Explosives manufacturing	0	0	0	35	0	0.0%	-100.0%	\$0	\$0	\$ -	\$ -	0.00		
Small arms ammunition manufacturing	0	38	38	1	38	New	3487.6%	\$1,292,307	\$1,292,307	\$ 34,168	\$ 34,168	0.00		
Ammunition, except for small arms, manufacturing	0	0	0	2	20	0.0%	800.4%	\$0	\$689,739	\$ -	\$ 34,957	0.00		
Small arms, ordnance, and accessories manufacturing	0	0	0	440	942	0.0%	114.1%	\$0	\$88,283,211	\$ -	\$ 93,730	0.00		
Other communications equipment manufacturing	0	0	0	192	236	0.0%	23.4%	\$0	\$18,211,861	\$ -	\$ 77,033	0.00		
Search, detection, and navigation instruments manufacturing	0	0	0	8,220	6,655	0.0%	-19.0%	\$0	\$832,620,667	\$ -	\$ 125,108	0.00		
Guided missile and space vehicle manufacturing	0	0	0	13,422	9,887	0.0%	-26.3%	\$0	\$1,430,833,740	\$ -	\$ 144,718	0.00		
Military armored vehicle, tank, and tank component manufacturing	0	0	0	343	77	0.0%	-77.5%	\$0	\$5,297,454	\$ -	\$ 68,592	0.00		
Employment and payroll of federal govt, military	57	49	49	38,207	35,008	-13.4%	-8.4%	\$1,629,873	\$2,307,677,002	\$ 32,959	\$ 65,918	0.53		
<b>Electrical Equipment, Appliance and Component Manufacturing</b>														
Electric lamp bulb and part manufacturing	0	0	0	0	22	0.0%	New	\$0	\$1,300,287	\$ -	\$ 58,279	0.00		
Lighting fixture manufacturing	0	0	0	233	324	0.0%	39.1%	\$0	\$16,342,060	\$ -	\$ 50,477	0.00		
Small electrical appliance manufacturing	0	0	0	58	93	0.0%	59.2%	\$0	\$5,775,472	\$ -	\$ 62,194	0.00		
Household cooking appliance manufacturing	0	0	0	6	18	0.0%	207.1%	\$0	\$258,053	\$ -	\$ 14,094	0.00		
Household refrigerator and home freezer manufacturing	0	0	0	376	588	0.0%	56.3%	\$0	\$46,756,161	\$ -	\$ 79,559	0.00		
Household laundry equipment manufacturing	0	0	0	0	0	0.0%	0.0%	\$0	\$0	\$ -	\$ -	0.00		
Other major household appliance manufacturing	0	0	0	0	6	0.0%	New	\$0	\$83,597	\$ -	\$ 13,983	0.00		
Power, distribution, and specialty transformer manufacturing	0	0	0	215	237	0.0%	10.2%	\$0	\$16,520,922	\$ -	\$ 69,670	0.00		
Motor and generator manufacturing	0	0	0	253	193	0.0%	-23.7%	\$0	\$14,162,351	\$ -	\$ 73,308	0.00		
Switchgear and switchboard apparatus manufacturing	0	0	0	75	113	0.0%	50.6%	\$0	\$7,231,501	\$ -	\$ 63,923	0.00		
Relay and industrial control manufacturing	7	0	0	88	236	-100.0%	168.8%	\$0	\$12,617,188	\$ -	\$ 53,543	26.82		
Storage battery manufacturing	0	0	0	239	132	0.0%	-44.6%	\$0	\$9,087,156	\$ -	\$ 68,711	0.00		
Primary battery manufacturing	0	0	0	45	0	0.0%	-100.0%	\$0	\$0	\$ -	\$ -	0.00		
Fiber optic cable manufacturing	0	0	0	39	0	0.0%	-100.0%	\$0	\$0	\$ -	\$ -	0.00		
Other communication and energy wire manufacturing	0	0	0	47	174	0.0%	268.9%	\$0	\$12,669,175	\$ -	\$ 72,939	0.00		
Wiring device manufacturing	0	0	0	319	259	0.0%	-18.8%	\$0	\$13,086,457	\$ -	\$ 50,567	0.00		
Carbon and graphite product manufacturing	0	0	0	28	51	0.0%	81.7%	\$0	\$2,256,925	\$ -	\$ 43,949	0.00		
All other miscellaneous electrical equipment and component manufacturing	0	0	0	429	640	0.0%	49.2%	\$0	\$43,427,540	\$ -	\$ 67,902	0.00		

	Payson Regional Employment		Arizona Employment		2009-14 Employment Growth		Payson Regional Payroll 2014	Arizona Payroll 2014	2014 Earnings Per Employee		Payson to Arizona LQ	
	2009	2014	2009	2014	Payson Regional	Arizona			Payson Regional	Arizona	2009	2014
<b>Manufacturing Super Cluster (Continued)</b>												
<b>Advanced Materials</b>												
Asphalt paving mixture and block manufacturing	0	0	123	136	0.0%	10.1%	\$0	\$8,822,287	\$ -	\$ 65,059	0.00	0.00
Asphalt shingle and coating materials manufacturing	14	0	67	84	-100.0%	24.8%	\$0	\$8,169,822	\$ -	\$ 97,608	72.51	0.00
Petroleum lubricating oil and grease manufacturing	0	0	2	6	0.0%	146.6%	\$0	\$110,100	\$ -	\$ 19,620	0.00	0.00
All other petroleum and coal products manufacturing	0	0	1	0	0.0%	-100.0%	\$0	\$0	\$ -	\$ -	0.00	0.00
Petrochemical manufacturing	0	0	8	47	0.0%	485.6%	\$0	\$12,707,596	\$ -	\$ 269,077	0.00	0.00
Industrial gas manufacturing	0	0	194	167	0.0%	-14.1%	\$0	\$18,723,511	\$ -	\$ 112,247	0.00	0.00
Synthetic dye and pigment manufacturing	0	0	30	47	0.0%	60.1%	\$0	\$9,121,305	\$ -	\$ 192,963	0.00	0.00
Other basic inorganic chemical manufacturing	0	0	100	235	0.0%	134.8%	\$0	\$18,550,974	\$ -	\$ 79,091	0.00	0.00
Other basic organic chemical manufacturing	0	0	94	91	0.0%	-2.7%	\$0	\$4,924,950	\$ -	\$ 53,987	0.00	0.00
Plastics material and resin manufacturing	0	0	53	226	0.0%	329.7%	\$0	\$12,355,210	\$ -	\$ 54,606	0.00	0.00
Synthetic rubber manufacturing	0	0	182	321	0.0%	77.0%	\$0	\$19,065,268	\$ -	\$ 59,327	0.00	0.00
Artificial and synthetic fibers and filaments manufacturing	0	0	474	96	0.0%	-79.8%	\$0	\$4,760,777	\$ -	\$ 49,805	0.00	0.00
Surgical and medical instrument manufacturing	0	0	529	1,719	0.0%	224.9%	\$0	\$144,959,946	\$ -	\$ 84,323	0.00	0.00
Surgical appliance and supplies manufacturing	0	8	3,570	3,333	New	-6.7%	\$679,282	\$320,127,289	\$ 87,539	\$ 96,057	0.00	0.75
Dental equipment and supplies manufacturing	0	0	24	13	0.0%	-44.8%	\$0	\$557,008	\$ -	\$ 42,596	0.00	0.00
Ophthalmic goods manufacturing	0	0	105	91	0.0%	-13.6%	\$0	\$5,510,165	\$ -	\$ 60,671	0.00	0.00
Gasket, packing, and sealing device manufacturing	0	0	114	175	0.0%	53.8%	\$0	\$10,678,896	\$ -	\$ 61,145	0.00	0.00
Musical instrument manufacturing	0	0	90	79	0.0%	-12.5%	\$0	\$1,398,703	\$ -	\$ 17,798	0.00	0.00
<b>Apparel and Textiles</b>												
Fiber, yarn, and thread mills	0	0	130	92	0.0%	-29.6%	\$0	\$5,498,298	\$ -	\$ 60,041	0.00	0.00
Broadwoven fabric mills	0	0	32	69	0.0%	120.3%	\$0	\$1,776,336	\$ -	\$ 25,564	0.00	0.00
Narrow fabric mills and schiffli machine embroidery	0	0	5	71	0.0%	1430.3%	\$0	\$2,717,307	\$ -	\$ 38,240	0.00	0.00
Nonwoven fabric mills	0	0	11	27	0.0%	138.1%	\$0	\$1,368,542	\$ -	\$ 50,176	0.00	0.00
Knit fabric mills	0	0	21	23	0.0%	8.8%	\$0	\$912,570	\$ -	\$ 39,008	0.00	0.00
Textile and fabric finishing mills	0	0	144	126	0.0%	-12.8%	\$0	\$4,252,421	\$ -	\$ 33,880	0.00	0.00
Fabric coating mills	0	0	138	48	0.0%	-65.2%	\$0	\$9,422,800	\$ -	\$ 196,453	0.00	0.00
Carpet and rug mills	0	0	90	55	0.0%	-38.5%	\$0	\$2,802,591	\$ -	\$ 50,614	0.00	0.00
Curtain and linen mills	0	0	186	269	0.0%	44.6%	\$0	\$9,886,084	\$ -	\$ 36,738	0.00	0.00
Textile bag and canvas mills	0	0	147	165	0.0%	12.6%	\$0	\$5,410,963	\$ -	\$ 32,774	0.00	0.00
Rope, cordage, twine, tire cord and tire fabric mills	0	0	81	0	0.0%	-100.0%	\$0	\$0	\$ -	\$ -	0.00	0.00
Other textile product mills	0	0	590	355	0.0%	-39.8%	\$0	\$11,411,493	\$ -	\$ 32,106	0.00	0.00
Hosiery and sock mills	0	0	28	0	0.0%	-100.0%	\$0	\$0	\$ -	\$ -	0.00	0.00
Other apparel knitting mills	0	0	21	0	0.0%	-100.0%	\$0	\$0	\$ -	\$ -	0.00	0.00
Cut and sew apparel contractors	0	0	525	429	0.0%	-18.3%	\$0	\$3,285,122	\$ -	\$ 7,660	0.00	0.00
Men's and boys' cut and sew apparel manufacturing	0	0	208	102	0.0%	-50.9%	\$0	\$742,970	\$ -	\$ 7,286	0.00	0.00
Women's and girls' cut and sew apparel manufacturing	0	0	51	156	0.0%	209.1%	\$0	\$1,646,680	\$ -	\$ 10,547	0.00	0.00
Other cut and sew apparel manufacturing	0	0	71	71	0.0%	0.0%	\$0	\$187,198	\$ -	\$ 2,637	0.00	0.00
Apparel accessories and other apparel manufacturing	0	0	35	49	0.0%	40.8%	\$0	\$364,428	\$ -	\$ 7,408	0.00	0.00
Leather and hide tanning and finishing	0	0	22	125	0.0%	478.4%	\$0	\$1,049,209	\$ -	\$ 8,415	0.00	0.00
Footwear manufacturing	0	0	87	84	0.0%	-3.0%	\$0	\$895,830	\$ -	\$ 10,667	0.00	0.00
Other leather and allied product manufacturing	0	0	254	385	0.0%	51.7%	\$0	\$8,801,149	\$ -	\$ 22,875	0.00	0.00
Mattress manufacturing	0	0	503	697	0.0%	38.6%	\$0	\$35,593,330	\$ -	\$ 51,034	0.00	0.00
Jewelry and silverware manufacturing	0	0	223	463	0.0%	107.9%	\$0	\$7,805,104	\$ -	\$ 16,846	0.00	0.00
Sporting and athletic goods manufacturing	0	0	1,918	1,682	0.0%	-12.3%	\$0	\$88,961,006	\$ -	\$ 52,895	0.00	0.00
Fasteners, buttons, needles, and pins manufacturing	2	0	96	164	-100.0%	71.7%	\$0	\$4,414,925	\$ -	\$ 26,892	6.62	0.00
<b>Chemicals and Chemical-Based Products</b>												
Paint and coating manufacturing	0	0	182	263	0.0%	45.1%	\$0	\$16,190,912	\$ -	\$ 61,485	0.00	0.00
Adhesive manufacturing	0	0	56	102	0.0%	83.7%	\$0	\$5,655,424	\$ -	\$ 55,439	0.00	0.00
Soap and other detergent manufacturing	0	0	113	340	0.0%	200.4%	\$0	\$18,172,928	\$ -	\$ 53,521	0.00	0.00
Polish and other sanitation good manufacturing	0	0	123	137	0.0%	11.0%	\$0	\$4,536,384	\$ -	\$ 33,173	0.00	0.89
Surface active agent manufacturing	0	0	26	62	0.0%	133.9%	\$0	\$6,519,624	\$ -	\$ 105,965	0.00	0.00
Toilet preparation manufacturing	0	0	596	646	0.0%	8.3%	\$0	\$30,308,929	\$ -	\$ 46,939	0.00	0.00

	Payson Regional Employment		Arizona Employment		2009-14 Employment Growth		Payson Regional Payroll 2014	Arizona Payroll 2014	2014 Earnings Per Employee		Payson to Arizona LQ			
	2009	2014	2009	2014	Payson Regional	Arizona			Payson Regional	Arizona	Payson Regional	Arizona	2009	2014
<b>Manufacturing Super Cluster (Continued)</b>														
Printing ink manufacturing	0	0	0	23	35	0.0%	52.4%	\$0	\$1,035,334	\$	-	\$ 29,425	0.00	
Custom compounding of purchased resins	0	0	0	131	205	0.0%	56.2%	\$0	\$11,806,646	\$	-	\$ 57,668	0.00	
<b>Chemicals and Chemical-Based Products (Continued)</b>														
Photographic film and chemical manufacturing	0	0	0	162	273	0.0%	68.2%	\$0	\$15,265,574	\$	-	\$ 55,906	0.00	
Other miscellaneous chemical product manufacturing	0	0	0	385	146	0.0%	-62.1%	\$0	\$8,245,860	\$	-	\$ 56,417	0.00	
Plastics packaging materials and unlaminated film and sheet manufacturing	0	0	0	163	135	0.0%	-17.2%	\$0	\$7,094,749	\$	-	\$ 52,495	0.00	
Unlaminated plastics profile shape manufacturing	0	0	0	169	153	0.0%	-9.3%	\$0	\$6,690,581	\$	-	\$ 43,687	0.00	
Plastics pipe and pipe fitting manufacturing	0	0	0	328	283	0.0%	-14.0%	\$0	\$18,772,678	\$	-	\$ 66,444	0.00	
Laminated plastics plate, sheet (except packaging), and shape manufacturing	0	0	0	30	28	0.0%	-5.6%	\$0	\$1,166,220	\$	-	\$ 41,449	0.00	
Polystyrene foam product manufacturing	0	0	0	473	408	0.0%	-13.8%	\$0	\$20,227,833	\$	-	\$ 49,584	0.00	
Urethane and other foam product (except polystyrene) manufacturing	0	0	0	160	210	0.0%	31.2%	\$0	\$7,737,942	\$	-	\$ 36,809	0.00	
Plastics bottle manufacturing	0	0	0	442	416	0.0%	-5.8%	\$0	\$27,952,227	\$	-	\$ 67,168	0.00	
Other plastics product manufacturing	0	0	0	1,961	2,188	0.0%	11.6%	\$0	\$106,303,246	\$	-	\$ 48,580	0.00	
Tire manufacturing	0	0	0	213	99	0.0%	-53.8%	\$0	\$5,395,822	\$	-	\$ 54,704	0.00	
Rubber and plastics hoses and belting manufacturing	0	0	0	116	106	0.0%	-9.2%	\$0	\$9,604,392	\$	-	\$ 90,831	0.00	
Other rubber product manufacturing	0	0	0	237	247	0.0%	4.3%	\$0	\$15,816,076	\$	-	\$ 63,947	0.00	
Lime manufacturing	0	0	0	61	117	0.0%	91.9%	\$0	\$9,379,999	\$	-	\$ 79,861	0.00	
Gypsum product manufacturing	0	0	0	121	56	0.0%	-54.0%	\$0	\$3,331,037	\$	-	\$ 59,783	0.00	
Abrasive product manufacturing	0	0	0	94	91	0.0%	-2.2%	\$0	\$6,420,393	\$	-	\$ 70,176	0.00	
Cut stone and stone product manufacturing	0	0	0	225	636	0.0%	183.2%	\$0	\$23,349,567	\$	-	\$ 36,709	0.00	
Mineral wool manufacturing	0	0	0	173	115	0.0%	-33.5%	\$0	\$5,079,293	\$	-	\$ 44,147	0.00	
<b>Forest and Wood Products</b>														
Forestry, forest products, and timber tract production	0	0	0	139	76	0.0%	-45.6%	\$0	\$3,215,954	\$	-	\$ 42,409	0.00	
Commercial logging	28	13	612	612	323	-53.5%	-47.3%	N/D	\$4,424,312	N/D	N/D	\$ 13,713	15.90	
Sawmills	0	0	334	334	156	0.0%	-53.2%	\$0	\$3,875,372	\$	-	\$ 24,821	0.00	
Wood preservation	0	0	41	41	76	0.0%	82.9%	\$0	\$2,964,714	\$	-	\$ 39,233	0.00	
Veneer and plywood manufacturing	0	0	18	18	30	0.0%	69.0%	\$0	\$845,228	\$	-	\$ 27,813	0.00	
Engineered wood member and truss manufacturing	0	0	574	574	572	0.0%	-0.2%	\$0	\$20,647,100	\$	-	\$ 36,068	0.00	
Reconstituted wood product manufacturing	0	0	12	12	56	0.0%	377.6%	\$0	\$2,136,393	\$	-	\$ 38,120	0.00	
Wood windows and door manufacturing	0	0	653	653	880	0.0%	34.7%	\$0	\$44,676,464	\$	-	\$ 50,774	0.00	
Cut stock, resawing lumber, and planing	0	0	155	155	33	0.0%	-78.7%	\$0	\$755,816	\$	-	\$ 22,936	0.00	
Other millwork, including flooring	0	0	485	485	462	0.0%	-4.8%	\$0	\$13,859,912	\$	-	\$ 30,027	0.00	
Wood container and pallet manufacturing	6	0	406	406	731	-100.0%	79.9%	\$0	\$22,094,667	\$	-	\$ 30,213	5.32	
Manufactured home (mobile home) manufacturing	0	0	1,228	1,228	933	0.0%	-24.1%	\$0	\$45,881,771	\$	-	\$ 49,194	0.00	
Prefabricated wood building manufacturing	0	0	247	247	363	0.0%	46.8%	\$0	\$13,574,173	\$	-	\$ 37,420	0.00	
All other miscellaneous wood product manufacturing	0	0	206	206	415	0.0%	101.3%	\$0	\$12,355,845	\$	-	\$ 29,757	0.00	
Pulp mills	0	0	37	37	0	0.0%	-100.0%	\$0	\$0	\$0	-	\$ -	0.00	
Paper mills	0	0	356	356	47	0.0%	-86.7%	\$0	\$3,128,460	\$	-	\$ 65,916	0.00	
Paperboard mills	0	0	40	40	20	0.0%	-50.7%	\$0	\$1,389,758	\$	-	\$ 69,981	0.00	
Paperboard container manufacturing	0	0	646	646	633	0.0%	-2.0%	\$0	\$37,346,130	\$	-	\$ 58,981	0.00	
Paper bag and coated and treated paper manufacturing	0	0	377	377	501	0.0%	32.8%	\$0	\$32,260,017	\$	-	\$ 64,422	0.00	
Stationery product manufacturing	0	0	132	132	168	0.0%	27.7%	\$0	\$8,768,591	\$	-	\$ 52,215	0.00	
Sanitary paper product manufacturing	0	0	673	673	769	0.0%	14.3%	\$0	\$43,124,222	\$	-	\$ 56,086	0.00	
All other converted paper product manufacturing	0	0	11	11	46	0.0%	310.1%	\$0	\$2,643,067	\$	-	\$ 57,577	0.00	
Wood kitchen cabinet and countertop manufacturing	4	0	1,853	1,853	2,368	-100.0%	27.8%	\$0	\$85,405,998	\$	-	\$ 36,060	0.77	
Upholstered household furniture manufacturing	0	0	84	84	288	0.0%	242.5%	\$0	\$9,323,956	\$	-	\$ 32,362	0.00	
Nonupholstered wood household furniture manufacturing	5	4	1,175	1,175	1,103	-20.9%	-6.1%	\$180,155	\$35,311,234	\$	41,643	\$ 32,006	1.64	
Other household nonupholstered furniture manufacturing	0	0	342	342	186	0.0%	-45.6%	\$0	\$5,613,250	\$	-	\$ 30,149	0.00	
Institutional furniture manufacturing	0	0	57	57	41	0.0%	-26.8%	\$0	\$2,268,602	\$	-	\$ 54,761	0.00	
Wood office furniture manufacturing	0	0	225	225	174	0.0%	-22.5%	\$0	\$6,177,191	\$	-	\$ 35,498	0.00	
Custom architectural woodwork and millwork	0	0	218	218	420	0.0%	92.4%	\$0	\$19,383,076	\$	-	\$ 46,188	0.00	
Office furniture, except wood, manufacturing	0	0	354	354	152	0.0%	-57.0%	\$0	\$6,899,283	\$	-	\$ 45,304	0.00	
Showcase, partition, shelving, and locker manufacturing	0	0	419	419	331	0.0%	-20.8%	\$0	\$11,877,994	\$	-	\$ 35,832	0.00	

	Payson Regional Employment		Arizona Employment		2009-14 Employment Growth		Payson Regional Payroll 2014	Arizona Payroll 2014	2014 Earnings Per Employee		Payson to Arizona LQ		
	2009	2014	2009	2014	Payson Regional	Arizona			Payson Regional	Arizona		2014 Earnings Per Employee	
												2009	2014
<b>Manufacturing Super Cluster (Continued)</b>													
Blind and shade manufacturing	0	0	0	266	437	0.0%	64.2%	\$0	\$17,670,679	\$ -	\$ 40,460	0.00	
Broom, brush, and mop manufacturing	0	0	0	13	0	0.0%	-100.0%	\$0	\$0	\$ -	\$ -	0.00	
Burial casket manufacturing	2	0	0	90	39	-100.0%	-56.2%	\$0	\$1,507,154	\$ -	\$ 38,372	6.62	
All other miscellaneous manufacturing	22	4	4	1,196	1,397	-80.8%	16.8%	\$47,439	\$47,512,249	\$ 11,040	\$ 34,004	6.62	
<b>Glass and Ceramics</b>													
Pottery, ceramics, and plumbing fixture manufacturing	0	0	0	121	174	0.0%	44.4%	\$0	\$3,776,580	\$ -	\$ 21,670	0.00	
Brick, tile, and other structural clay product manufacturing	0	0	0	397	213	0.0%	-46.3%	\$0	\$8,665,045	\$ -	\$ 40,650	0.00	
Flat glass manufacturing	0	0	0	11	139	0.0%	1164.7%	\$0	\$8,721,169	\$ -	\$ 62,918	0.00	
Other pressed and blown glass and glassware manufacturing	0	0	0	127	851	0.0%	571.8%	\$0	\$66,183,342	\$ -	\$ 77,792	0.00	
Glass container manufacturing	0	0	0	4	0	0.0%	-100.0%	\$0	\$0	\$ -	\$ -	0.00	
Glass product manufacturing made of purchased glass	0	0	0	301	619	0.0%	105.9%	\$0	\$27,836,039	\$ -	\$ 44,959	0.00	
Cement manufacturing	0	0	0	298	326	0.0%	9.1%	\$0	\$23,521,893	\$ -	\$ 72,256	0.00	
Ready-mix concrete manufacturing	0	69	69	2,862	2,393	New	-16.4%	\$3,087,213	\$146,691,711	\$ 45,036	\$ 61,305	0.00	
Concrete block and brick manufacturing	0	0	0	546	624	0.0%	14.4%	\$0	\$41,194,473	\$ -	\$ 65,968	0.00	
Concrete pipe manufacturing	0	0	0	256	169	0.0%	-33.7%	\$0	\$9,304,194	\$ -	\$ 54,918	0.00	
Other concrete product manufacturing	0	0	0	731	492	0.0%	-32.7%	\$0	\$23,767,401	\$ -	\$ 48,316	0.00	
Ground or treated mineral and earth manufacturing	0	0	0	38	224	0.0%	483.0%	\$0	\$12,666,364	\$ -	\$ 56,470	0.00	
Miscellaneous nonmetallic mineral products manufacturing	0	0	0	132	142	0.0%	7.2%	\$0	\$7,267,919	\$ -	\$ 51,274	0.00	
Metal heat treating	0	0	0	271	157	0.0%	-42.0%	\$0	\$9,134,862	\$ -	\$ 58,085	0.00	
Metal coating and nonprecious engraving	0	0	0	591	807	0.0%	36.6%	\$0	\$29,338,522	\$ -	\$ 36,340	0.00	
Electroplating, anodizing, and coloring metal	0	0	0	675	672	0.0%	-0.5%	\$0	\$31,881,033	\$ -	\$ 47,458	0.00	
<b>Mining</b>													
Iron ore mining	0	0	0	8	0	0.0%	-100.0%	\$0	\$0	\$ -	\$ -	0.00	
Gold ore mining	0	0	0	8	411	0.0%	4898.1%	\$0	\$10,933,241	\$ -	\$ 26,613	0.00	
Silver ore mining	0	0	0	0	0	0.0%	0.0%	\$0	\$0	\$ -	\$ -	0.00	
Lead and zinc ore mining	55	0	0	2,024	23	-100.0%	-98.8%	\$0	\$344,645	\$ -	\$ 14,705	9.66	
Copper ore mining	215	0	0	7,840	10,408	-100.0%	32.7%	\$0	\$955,923,828	\$ -	\$ 91,849	9.66	
Other metal ore mining	0	0	0	4	87	0.0%	1899.6%	\$0	\$2,336,823	\$ -	\$ 26,712	0.00	
Stone mining and quarrying	1	26	26	837	963	4209.3%	15.0%	\$362,656	\$30,042,324	\$ 13,774	\$ 31,193	0.26	
Sand and gravel mining	0	0	0	413	1,033	0.0%	149.9%	\$0	\$30,252,531	\$ -	\$ 29,299	0.00	
Other clay, ceramic, refractory minerals mining	0	0	0	30	24	0.0%	-19.5%	\$0	\$169,857	\$ -	\$ 7,009	0.00	
Potash, soda, and borate mineral mining	4	0	0	101	94	-100.0%	-7.1%	\$0	\$9,248,705	\$ -	\$ 98,608	12.70	
Phosphate rock mining	2	0	0	61	0	-100.0%	-100.0%	\$0	\$0	\$ -	\$ -	12.70	
Other chemical and fertilizer mineral mining	1	10	10	30	118	839.2%	300.9%	\$51,883	\$804,608	\$ 5,198	\$ 6,799	12.70	
Other nonmetallic minerals	2	0	0	48	290	-100.0%	503.2%	\$0	\$6,363,380	\$ -	\$ 21,943	12.70	
Metal mining services	0	1	1	47	242	New	411.2%	\$66,537	\$10,046,639	\$ 55,393	\$ 41,507	0.00	
<b>Personal Services</b>													
Automotive equipment rental and leasing	15	0	0	6,010	8,099	-100.0%	34.8%	\$0	\$312,396,851	\$ -	\$ 38,571	0.88	
General and consumer goods rental except video tapes and discs	44	12	12	4,853	6,165	-73.0%	27.0%	\$213,701	\$240,119,385	\$ 18,213	\$ 38,949	3.16	
Video tape and disc rental	28	0	0	2,366	214	-99.2%	-91.0%	\$6,176	\$6,256,563	\$ 27,958	\$ 29,292	4.24	
Commercial and industrial machinery and equipment rental and leasing	19	0	0	4,072	4,641	-100.0%	14.0%	\$0	\$185,218,735	\$ -	\$ 39,907	1.66	
Individual and family services	12	40	40	27,167	31,115	238.2%	14.5%	\$346,655	\$756,350,220	\$ 8,599	\$ 24,308	0.15	
Community food, housing, and other relief services, including rehabilitation serv	20	35	35	11,509	8,818	78.7%	-23.4%	\$1,015,038	\$277,289,185	\$ 29,074	\$ 31,447	0.60	
Child day care services	14	102	102	17,093	23,121	630.5%	35.3%	\$187,649	\$257,671,783	\$ 1,844	\$ 11,145	0.29	
Automotive repair and maintenance, except car washes	169	167	167	24,545	33,459	-0.8%	36.3%	\$3,337,578	\$1,294,198,608	\$ 19,974	\$ 38,680	2.42	
Car washes	0	7	7	5,867	6,579	New	12.1%	\$97,724	\$197,938,202	\$ 13,165	\$ 30,086	0.00	
Electronic and precision equipment repair and maintenance	7	4	4	4,321	4,181	-48.5%	-3.2%	\$123,024	\$207,851,151	\$ 31,910	\$ 49,716	0.61	
Commercial and industrial machinery and equipment repair and maintenance	5	0	0	6,404	6,367	-100.0%	-0.6%	\$0	\$370,875,519	\$ -	\$ 58,247	0.25	
Personal and household goods repair and maintenance	2	32	32	3,464	13,522	1784.8%	290.4%	\$294,818	\$153,491,348	\$ 9,245	\$ 11,351	0.17	
Personal care services	27	120	120	19,158	30,262	341.9%	58.0%	\$92,821	\$293,261,444	\$ 774	\$ 9,691	0.50	
Death care services	20	11	11	2,264	1,509	-43.1%	-33.4%	\$250,575	\$55,334,072	\$ 22,192	\$ 36,670	3.09	
Dry-cleaning and laundry services	27	5	5	9,905	6,097	-81.6%	-38.4%	\$19,207	\$175,108,597	\$ 3,933	\$ 28,718	0.94	
Other personal services	13	165	165	7,307	27,298	1190.0%	273.6%	\$306,667	\$219,448,700	\$ 1,863	\$ 8,039	0.62	

	Payson Regional Employment		Arizona Employment		2009-14 Employment Growth		Payson Regional Payroll 2014	Arizona Payroll 2014	2014 Earnings Per Employee		Payson to Arizona LQ	
	2009	2014	2009	2014	Payson Regional	Arizona			Payson Regional	Arizona	2009	2014
<b>Personal Services (Continued)</b>												
Religious organizations	0	12	9,590	9,724	New	1.4%	\$294,004	\$350,018,921	\$ 25,496	\$ 35,995	0.00	0.38
Grantmaking, giving, and social advocacy organizations	56	7	11,190	6,267	-86.9%	-44.0%	\$70,767	\$286,032,135	\$ 9,581	\$ 45,644	1.78	0.38
Business and professional associations	64	13	9,822	2,907	-79.0%	-70.4%	\$196,628	\$137,483,826	\$ 14,718	\$ 47,288	2.29	1.48
Labor and civic organizations	71	16	11,018	8,987	-77.4%	-18.4%	\$151,050	\$226,722,061	\$ 9,346	\$ 25,228	2.29	0.58
<b>Printing and Publishing</b>												
Printing	0	0	5,760	7,618	0.0%	32.3%	\$0	\$310,099,396	\$ -	\$ 40,706	0.00	0.00
Support activities for printing	0	0	922	905	0.0%	-1.8%	\$0	\$43,920,582	\$ -	\$ 48,550	0.00	0.00
Office supplies (except paper) manufacturing	0	0	47	113	0.0%	137.9%	\$0	\$2,180,676	\$ -	\$ 19,336	0.00	0.00
Sign manufacturing	5	1	1,603	2,189	-76.3%	36.5%	\$40,577	\$73,413,551	\$ 34,011	\$ 33,539	1.11	0.18
Newspaper publishers	30	25	5,573	3,865	-16.8%	-30.6%	\$592,172	\$192,715,683	\$ 23,802	\$ 49,862	1.89	2.07
Directory, mailing list, and other publishers	0	0	341	496	0.0%	45.6%	\$0	\$16,754,658	\$ -	\$ 33,763	0.00	0.00
Greeting card publishing	0	0	29	21	0.0%	-27.7%	\$0	\$302,938	\$ -	\$ 14,284	0.00	0.00
News syndicates, libraries, archives and all other information services	3	4	1,677	954	20.3%	-43.1%	\$76,626	\$51,997,353	\$ 18,805	\$ 54,481	0.71	1.37
Internet publishing and broadcasting and web search portals	3	4	1,599	1,569	62.2%	-1.9%	\$123,531	\$109,615,494	\$ 29,053	\$ 69,877	0.58	0.87
<b>Transportation and Logistics</b>												
Air transportation	7	18	14,392	14,147	147.5%	-1.7%	\$1,078,103	\$1,211,502,563	\$ 59,883	\$ 85,638	0.18	0.41
Rail transportation	57	63	2,653	2,698	10.5%	1.7%	\$8,539,598	\$351,050,934	\$ 136,524	\$ 130,132	7.53	7.45
Water transportation	5	0	58	4	-100.0%	-93.5%	\$0	\$255,441	\$ -	\$ 67,734	28.06	0.00
Truck transportation	22	48	27,188	28,613	122.8%	5.2%	\$2,067,374	\$1,141,641,968	\$ 42,834	\$ 39,899	0.28	0.54
Transit and ground passenger transportation	0	15	10,999	12,649	New	15.0%	\$0	\$318,979,401	\$ -	\$ 25,218	0.00	0.39
Couriers and messengers	31	29	15,290	15,959	-7.4%	4.4%	\$202,835	\$478,580,627	\$ 7,082	\$ 29,987	0.71	0.58
Warehousing and storage	0	0	8,696	13,020	0.0%	49.7%	\$0	\$530,257,141	\$ -	\$ 40,726	0.00	0.00
Local government passenger transit	5	8	335	551	44.9%	64.3%	\$312,791	\$39,081,417	\$ 41,293	\$ 70,896	5.50	4.42
Wholesale trade	107	132	105,463	105,438	23.1%	0.0%	\$4,064,120	\$7,786,861,816	\$ 30,792	\$ 73,852	0.36	0.40
<b>Government</b>												
Postal service	48	34	11,272	9,160	-29.6%	-18.7%	\$2,683,451	\$785,587,708	\$ 78,998	\$ 85,767	1.51	1.19
Other federal government enterprises	0	0	3,328	1,972	0.0%	-40.7%	\$0	\$55,591,610	\$ -	\$ 28,186	0.00	0.00
State government passenger transit	1	0	46	0	-100.0%	-100.0%	\$0	\$0	\$ -	\$ -	5.50	0.00
State government electric utilities	0	0	11	0	0.0%	-100.0%	\$0	\$0	\$ -	\$ -	0.00	0.00
Other state government enterprises	13	0	828	0	-100.0%	-100.0%	\$0	\$0	\$ -	\$ -	5.71	0.00
Other local government enterprises	258	730	15,961	30,064	182.5%	88.4%	\$31,353,645	\$2,274,657,959	\$ 42,968	\$ 75,660	5.71	7.80
* Employment and payroll of state govt, non-education	453	108	57,318	46,279	-76.2%	-19.3%	\$6,679,221	\$3,263,706,299	\$ 62,072	\$ 70,522	2.79	0.75
* Employment and payroll of local govt, non-education	879	890	111,388	86,877	1.2%	-22.0%	\$41,374,134	\$6,243,672,852	\$ 46,502	\$ 71,868	2.79	3.29
* Employment and payroll of federal govt, non-military	209	153	44,123	42,509	-26.7%	-3.7%	\$13,590,405	\$4,534,062,500	\$ 88,799	\$ 106,660	1.67	1.16