ECONOMIC REPORT *to the* GOVERNOR

PREPARED BY THE
UTAH ECONOMIC COUNCIL

2021

A collaborative endeavor of
David Eccles School of Business
Governor's Office of Management and Budget

Utah Economic Council
DAVID ECCLES SCHOOL OF BUSINESS

Preface

The Utah Economic Report to the Governor serves as the preeminent source for data, research, and analysis about the Utah economy. This 2021 version marks 33 consecutive years of publication.

The report provides timely and relevant data and analysis about economic indicators, as well as a focus on critical industries in the state of Utah. The improved economic understanding and literacy helps decision-makers make economically informed decisions and helps Utah to prosper.

Utah Economic Council and Collaborators

The Utah Economic Council prepares and oversees the report's contents and publication, under the sponsorship and partnership of the Governor's Office of Management and Budget, the David Eccles School of Business, and the Salt Lake Chamber. This partnership brings together the strengths of government, academia, and business into a single report, providing a valuable economic asset to the community.

More detailed information about the findings in each chapter can be obtained by contacting the authoring entity, which is referenced at the beginning of each chapter.

Data Used in This Report

The contents of this report come from a multitude of sources. The authors source each table and figure and generally provide data for the most recent year or period available as of mid-November 2020. Readers will often encounter a quarter or more of lag time before economic data become final. Readers can refer to noted sources later in 2021 for final data.

Data in this report are subject to error arising from a variety of factors, including sampling variability, reporting errors, incomplete coverage, non-response, imputations, and processing error. Contact the authoring entity for information about sources, limitations, and appropriate use of the data included in this report.

Data for States and Counties

This report focuses on state and county geographies, but also includes some sub-county data. For information about data for a different level of geography than shown in this report contact the contributing entity.

Electronic Access

Visit the Kem C. Gardner Policy Institute's website at www.gardner.utah.edu for a digital version of this report.

Suggestions and Comments

The Utah Economic Council encourages suggestions and comments about the report. Send feedback to the Kem C. Gardner Policy Institute, 411 East South Temple Street, Salt Lake City, Utah 84111 or by email at gardnerinstitute@eccles.utah.edu.

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This report was edited and reviewed by Kem C. Gardner Policy Institute and GOMB staff.

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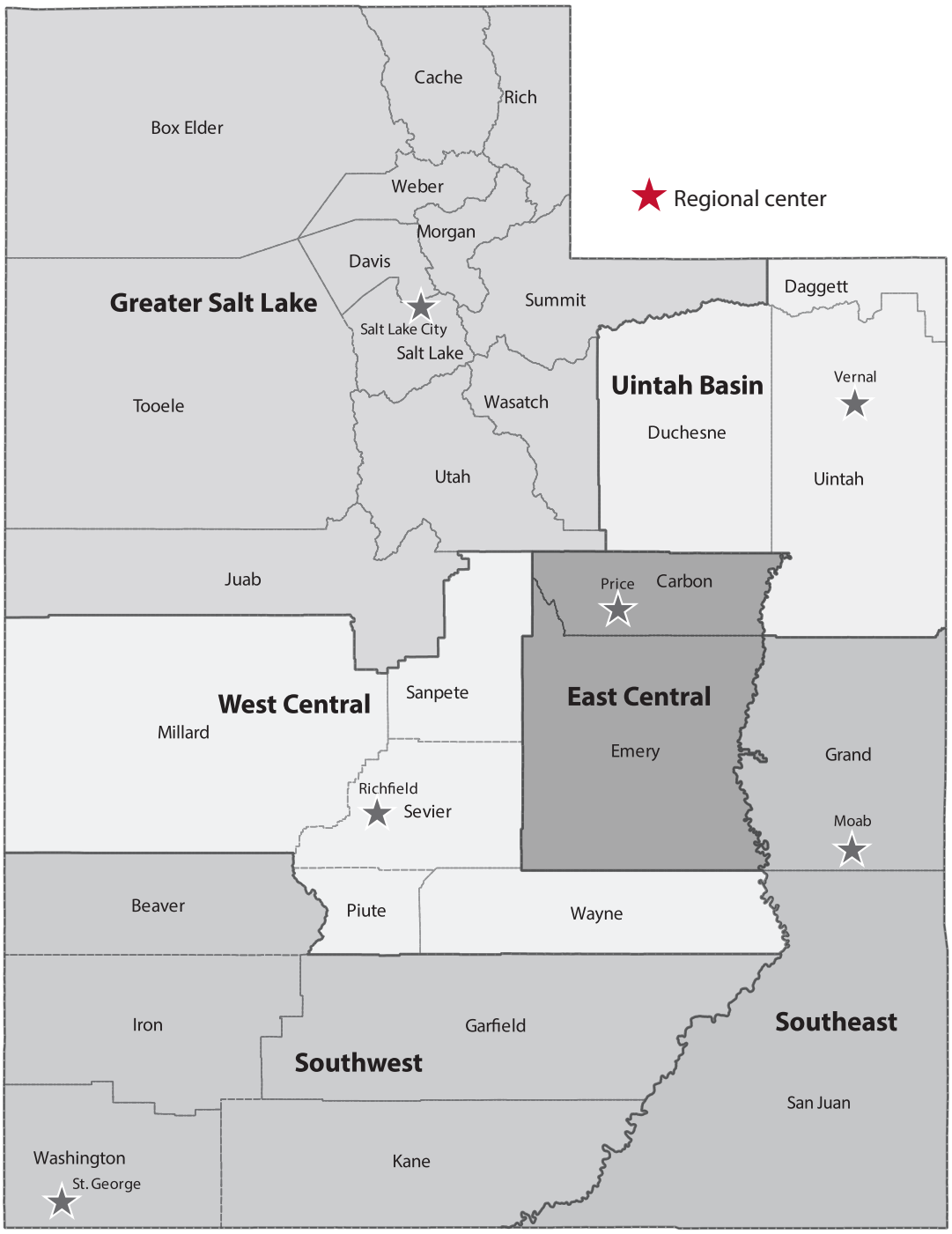
Utah's Economic Regions



Source: Kem C. Gardner Policy Institute

Economic Indicators for Utah and the United States, December 2020

	UNITS	2018 ACTUAL	2019 ACTUAL	2020 ESTIMATE	2021 FORECAST	PERCENT CHANGE 18 -19	19 - 20	20 - 21
DEMOGRAPHICS								
U.S. July 1st Population	Millions	327	328	329	335	0.3%	0.3%	1.8%
Utah July 1st Population	Thousands	3,167	3,220	3,273	3,324	1.7%	1.6%	1.6%
Utah Net Migration	Thousands	23.2	25	25.3	25	7.8%	1.2%	-1.2%
Utah Households	Thousands	1,061	1,085	1,110	1,136	2.3%	2.3%	2.3%
EMPLOYMENT AND WAGES								
U.S. Nonfarm Employment (BLS)	Millions	148.9	150.9	142.6	147.4	1.3%	-5.5%	3.4%
U.S. Unemployment Rate (BLS)	Percent	3.9%	3.7%	8.2%	6.4%			
U.S. Total Nonfarm Wages (BLS)	Billion Dollars	8,894	9,309	9,286	9,841	4.7%	-0.2%	6.0%
U.S. Average Annual Pay (BLS)	Dollars	59,737	61,678	65,110	66,768	3.2%	5.6%	2.5%
U.S. Personal Income (BEA)	Billion Dollars	17,852	18,552	19,917	19,431	3.9%	7.4%	-2.4%
Utah Nonfarm Employment (DWS)	Thousands	1,517	1,560	1,538	1,596	2.8%	-1.4%	3.8%
Utah Unemployment Rate (DWS)	Percent	3.1%	2.6%	4.9%	4.0%			
Utah Total Nonfarm Wages (DWS)	Million Dollars	72,270	77,400	82,020	88,520	7.1%	6.0%	7.9%
Utah Average Annual Pay (DWS)	Dollars	47,627	49,623	53,336	55,462	4.2%	7.5%	4.0%
Utah Personal Income (BEA)	Million Dollars	148,241	156,896	170,732	173,413	5.8%	8.8%	1.6%
PRODUCTION AND SALES								
U.S. Real Gross Domestic Product	Billion Chained $2012	18,688	19,092	18,415	19,091	2.2%	-3.5%	3.7%
U.S. Real Exports	Billion Chained $2012	2,550	2,547	2,234	2,456	-0.1%	-12.3%	9.9%
U.S. Retail Sales	Billion Dollars	6,005	6,216	6,190	6,617	3.5%	-0.4%	6.9%
Utah Exports (NAICS, Census)	Million Dollars	14,390	17,339	17,638	20,052	20.5%	1.7%	13.7%
Utah All Taxable Sales	Million Dollars	64,963	68,923	72,894	77,475	6.1%	5.8%	6.3%
REAL ESTATE AND CONSTRUCTION								
U.S. Private Residential Investment	Billion Dollars	798	807	870	934	1.1%	7.8%	7.4%
U.S. Nonresidential Structures	Billion Dollars	631	650	587	563	3.0%	-9.7%	-4.1%
U.S. Purchase-only Home Price Index	1991Q1 = 100	260	273	289	306	5.0%	5.9%	5.9%
Utah Dwelling Unit Permits	Thousands	24,245	27,610	30,745	30,000	13.9%	11.4%	-2.4%
Utah Residential Permit Value	Million Dollars	5,152	5,800	6,330	6,150	12.6%	9.1%	-2.8%
Utah Nonresidential Permit Value	Million Dollars	2,166	2,596	2,334	2,000	19.9%	-10.1%	-14.3%
Utah Purchase-only Home Price Index	1991Q1 = 100	472	507	558	588	7.4%	10.1%	5.4%
ENERGY PRODUCTION AND PRICES								
West Texas Intermediate Crude Oil	$ Per Barrel	64.9	57.0	38.7	46.0	-12.2%	-32.1%	18.9%
Utah Coal Production	Million Tons	13.8	14.3	13.5	14.5	3.6%	-5.6%	7.4%
Utah Coal Prices	$ Per Short Ton	36.3	38.0	36.0	35.0	4.7%	-5.3%	-2.8%
Utah Crude Oil Production	Million Barrels	37.1	36.9	32	33.5	-0.5%	-13.3%	4.7%
Utah Oil Prices	$ Per Barrel	56.9	48.3	33.0	37.0	-15.1%	-31.7%	12.1%
Utah Natural Gas Production Sales	Billion Cubic Feet	250	218	190	185	-12.8%	-12.8%	-2.6%
Utah Natural Gas Prices	$ Per MCF	2.77	2.5	2	2.75	-9.7%	-20.0%	37.5%
Utah Copper Mined Production	Million Pounds	466	410	330	380	-12.0%	-19.5%	15.2%
Utah Copper Prices	$ Per Pound	3	2.55	2.6	2.9	-15.0%	2.0%	11.5%
PRICES, INFLATION, AND INTEREST RATES								
U.S. CPI Urban Consumers	1982-84 = 100	251	256	259	266	2.0%	1.2%	2.7%
U.S. Federal Funds Rate	Effective Rate	1.83	2.16	0.38	0.1			
U.S. 3-Month Treasury Bills	Discount Rate	1.94	2.06	0.37	0.1			
U.S. 10-Year Treasury Notes	Yield (%)	2.91	2.14	0.85	0.9			
30-Year Fixed Mortgage Rate	Percent	4.54	3.94	3.18	3.09			

Sources: Utah Economic Council, State of Utah Revenue Assumptions Working Group, IHS Markit, U.S. Census Bureau, and Kem C. Gardner Policy Institute.

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Report Overview

Jim Wood, Kem C. Gardner Policy Institute
Darin Mellott, CBRE

UTAH

Utah's decade long expansion, the longest on record, ended in 2020 with the emergence of COVID-19. The public health crisis presented the greatest challenge to the Utah economy since the Great Recession. In the early spring, the forecast for 2020 was bleak as the unemployment rate in April climbed to roughly 10%. But as the year unfolded, the resiliency of the Utah economy was on full display. By November, Utah's year-over employment was down -0.2%, one of the smallest employment declines of any state, and the unemployment rate had dropped to 4.3%. Nationwide employment was -6.0% and the unemployment rate was 6.7%.

Although the job market in Utah has fared better than in any other state not all industries escaped the impact of COVID-19. Tourism has been hard hit, with national park visits down 32%. Bryce Canyon suffered the worst decline with a drop of 38% in visitations. Third-quarter data for accommodations services (hotels and motels) show a drop of 22% in lodging. Restaurants and fast food establishments have also been hurt, but the impact appears to be less than expected. Take-out and delivery have given some buffer to sit-down restaurants. Retail sales activity overall has been surprisingly strong. The 2020 forecast for taxable retail sales shows an increase of 13.3%, with building and garden establishments and grocery stores particularly strong.

Utah exports in 2020 are forecast to reach $17.6 billion, the third-highest year on record. Notably, the value of other export commodities (excludes gold) at $8.7 billion will be the highest ever, with electronics and agricultural products among Utah's major export products. The forecast for residential construction shows a record of 30,745 dwelling units, surpassing the previous record high of 28,285 in 2005. The value of residential construction will top $6.3 billion. The housing boom in apartments and condominiums continues, and single-family construction will have the best year since 2006. Housing demand has not slowed with COVID-19, as historically low mortgage rates attract buyers to the market. The strong demand has pushed up housing prices. The median sales price of a single-family home in Utah will be up by 11% to $385,000 in 2020. The construction boom includes nonresidential construction with $2.3 billion in value in 2020. The total value of permit authorized construction (residential, nonresidential, and additions, alterations and repairs) will be $10.3 billion in 2020, a record year as well.

While the public health crisis has been tragic, the impact of the pandemic on the Utah economy has been much milder than initially expected. And, a strong recovery is forecast for 2021, with employment increasing by 58,000 jobs, which would be the largest single-year increase in employment in Utah's history.

UNITED STATES

The spread of the SARS-CoV-2 virus that causes COVID-19 precipitated economic disruptions around the world. The U.S. economy was not spared with the sharpest quarterly drop in GDP on record, falling 31.4%, on an annualized basis, in Q2 2020. Policymakers met this crisis with an unprecedented amount of fiscal and monetary firepower. This included the $2.2 trillion CARES Act and a rapid expansion of the Fed's balance sheet. That response enabled a strong rebound in activity during Q3 2020 when the U.S. economy grew by 33.1%, on an annualized basis, in Q3 2020. This response was further fortified by the $900 billion COVID-relief package passed by Congress in late 2020.

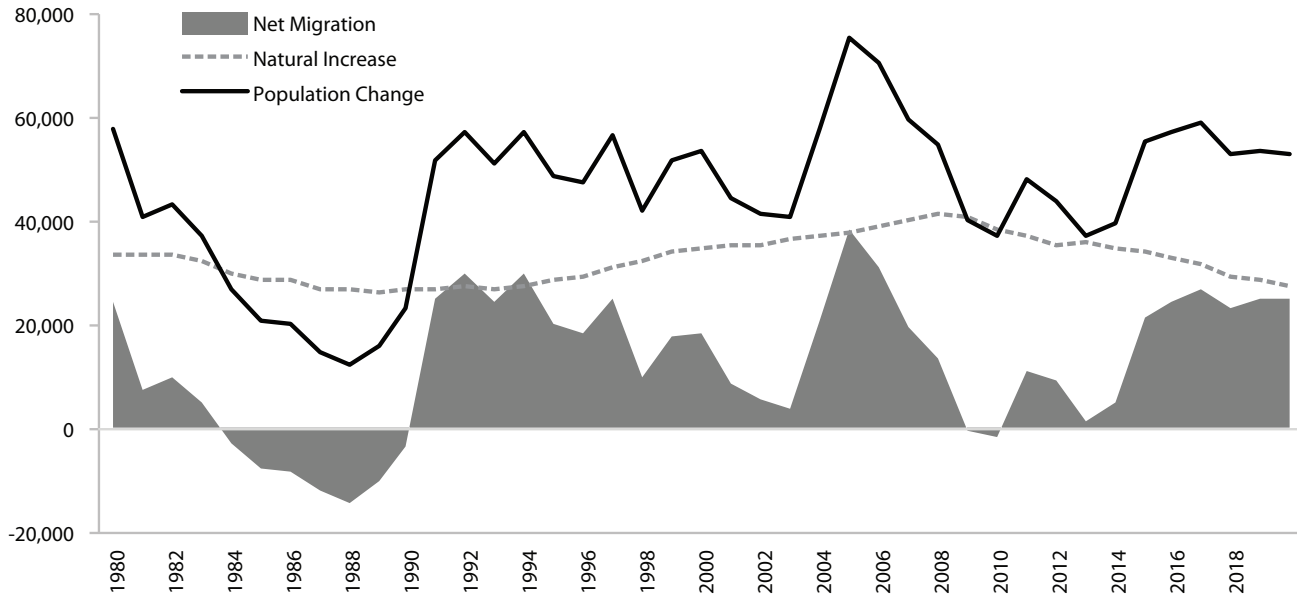
Looking ahead, a full economic recovery will depend on greater deployment of vaccines and therapeutics to end the pandemic. Fortunately, there is positive news on that front with two

vaccines already having received emergency use authorization in the U.S. Additional vaccines are likely to be approved during the first quarter of 2021. As such, current expectations are that the general public will have access to COVID-19 vaccines sometime in Q2 2021. As this occurs, normal activity levels will be able to resume and will fuel strong growth during the second and third quarters of 2021.

Mainstream projection sources have U.S. GDP contracting by 3.5% in 2020 and growing by 3.7% in 2021. In addition to pent up demand, this rebound will be supported by ultra-low interest rates that will further support consumer and business activity. Given the Fed's policy change to allow inflation to overshoot its 2% target after periods of subdued inflation, this support will remain in place until the economy is on firmer ground. Regarding the incoming Biden Administration, the President-elect has signaled a desire for additional fiscal stimulus. Should this occur, it would represent an upside opportunity to the current forecast. A return to a more normalized global trade environment, though tensions with China will remain, should further bolster business sentiment amid a strong recovery.

In summary, after a historically difficult year, the U.S. economy is poised to stage a strong recovery in 2021, with GDP growth approaching 4% for the year. This will be supported by interest rates that remain "lower for longer." In terms of risks to the outlook, if the vaccine rollout timeline were delayed, that would weigh on growth during the coming year. Should there be additional fiscal support for the economy, there would be notable upside opportunity to the current consensus forecast.

Utah Components of Population Change

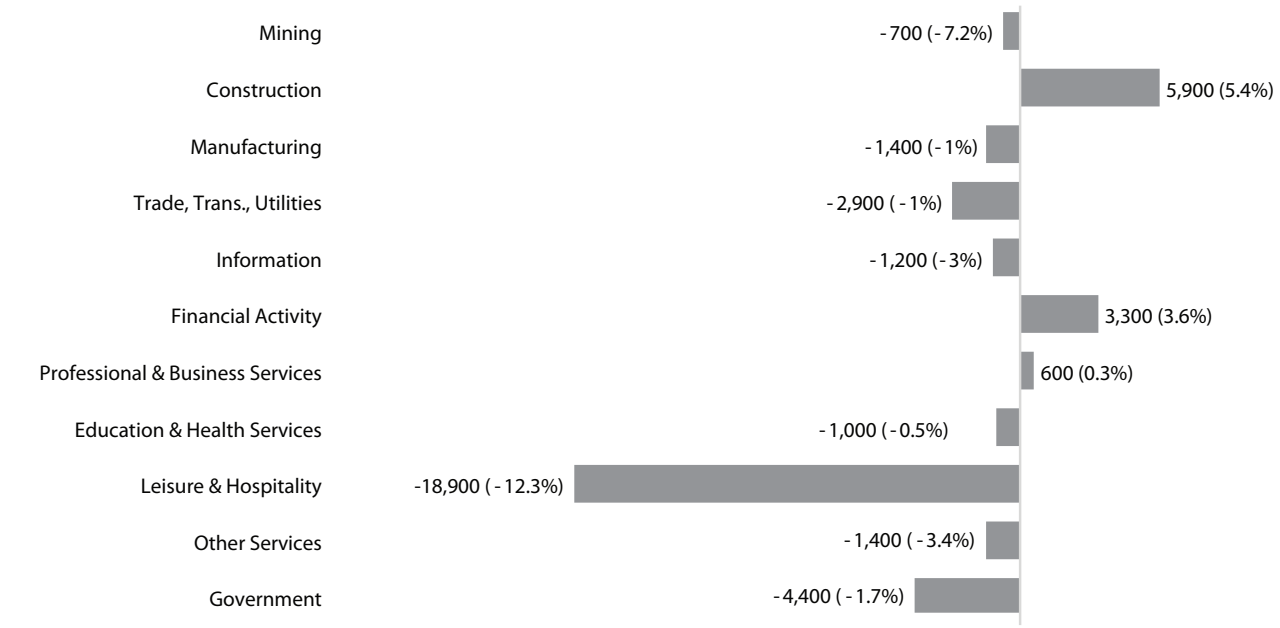


Source: Kem C. Gardner Policy Institute

Utah's Employment Growth Level and Percent by Industry

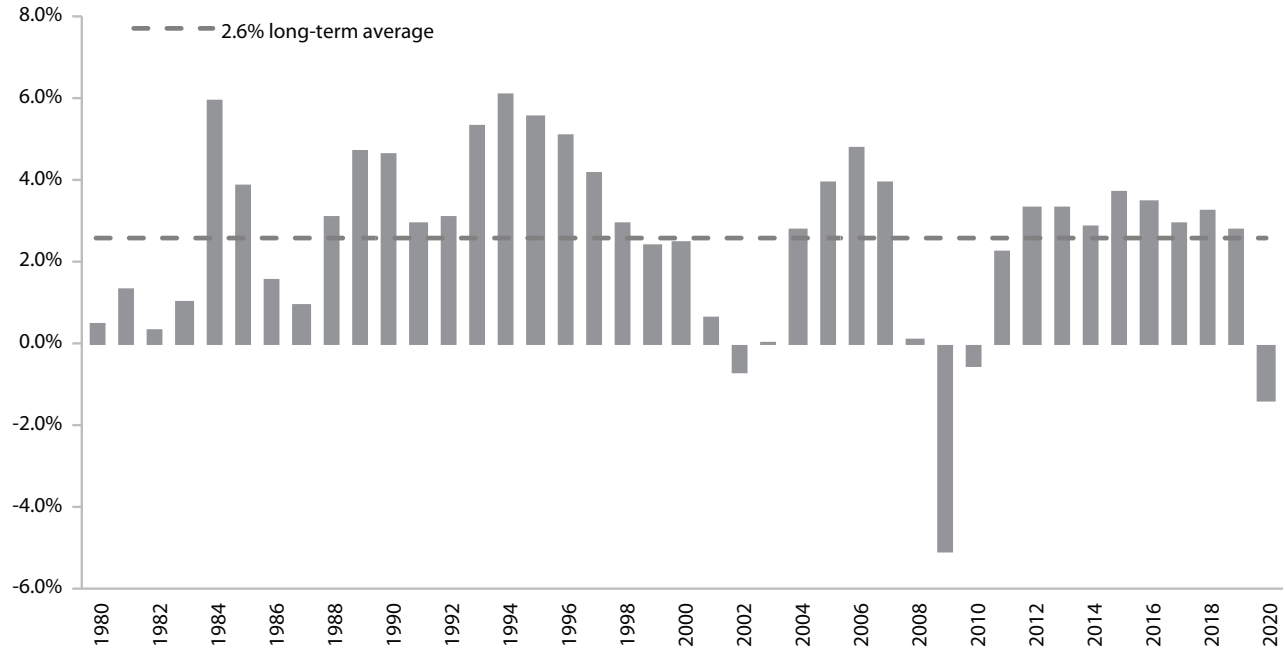
2019–2020

Total: -22,100 Jobs (-1.4%)



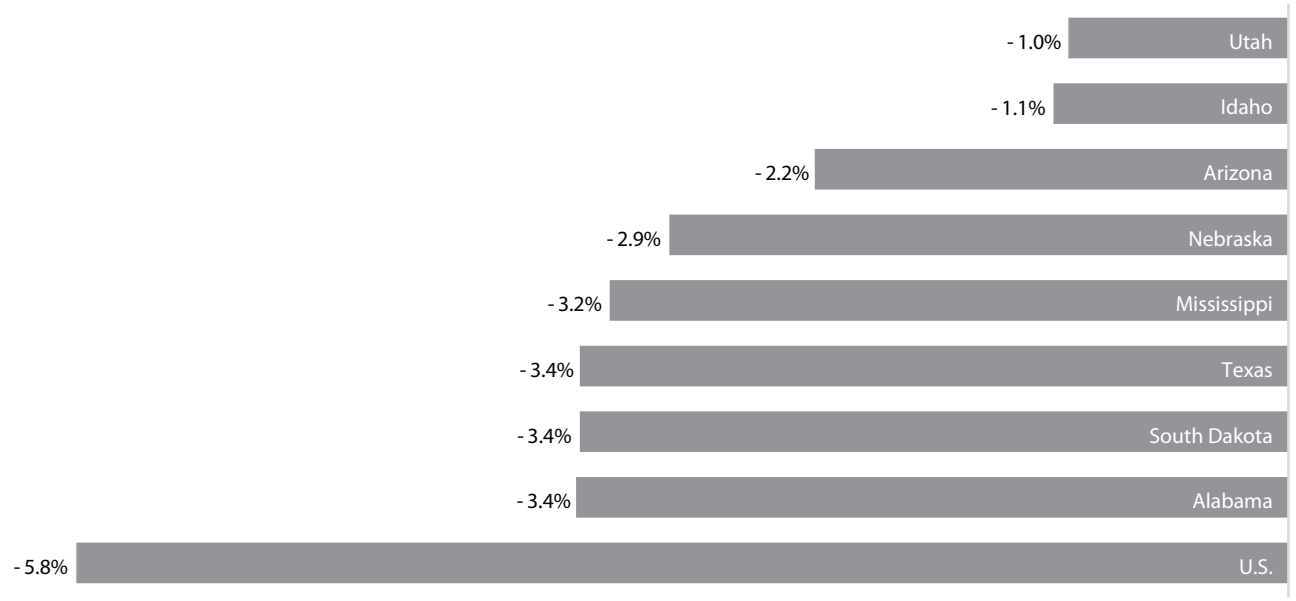
Source: Utah Department of Workforce Services, Workforce Research and Analysis

Utah Annual Job Growth History



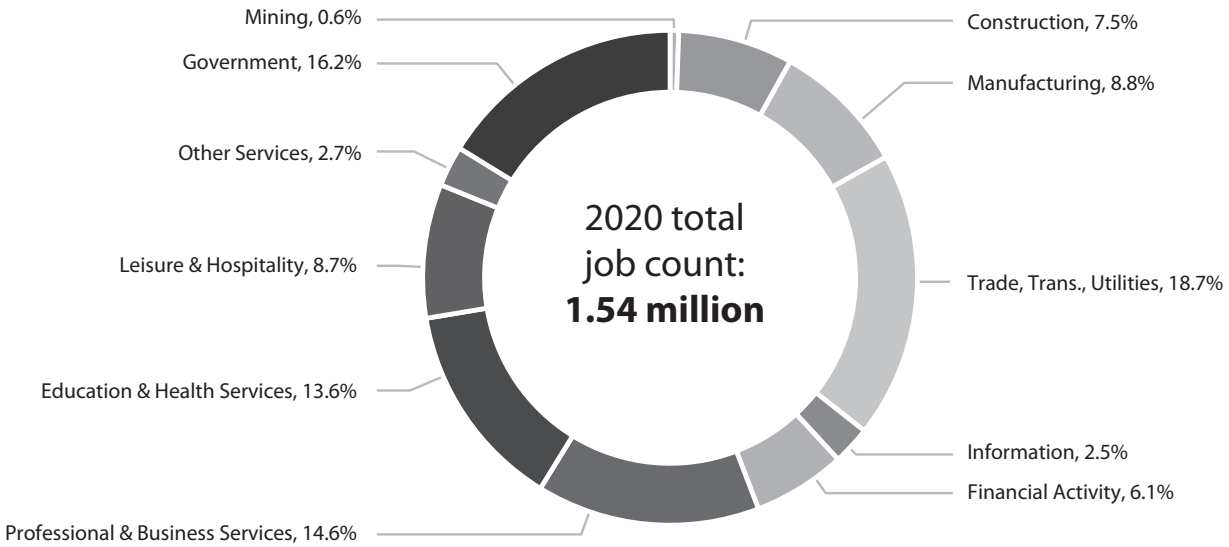
Source: Utah Department of Workforce Services, Workforce Research and Analysis

States with Strongest Job Growth
2019–2020



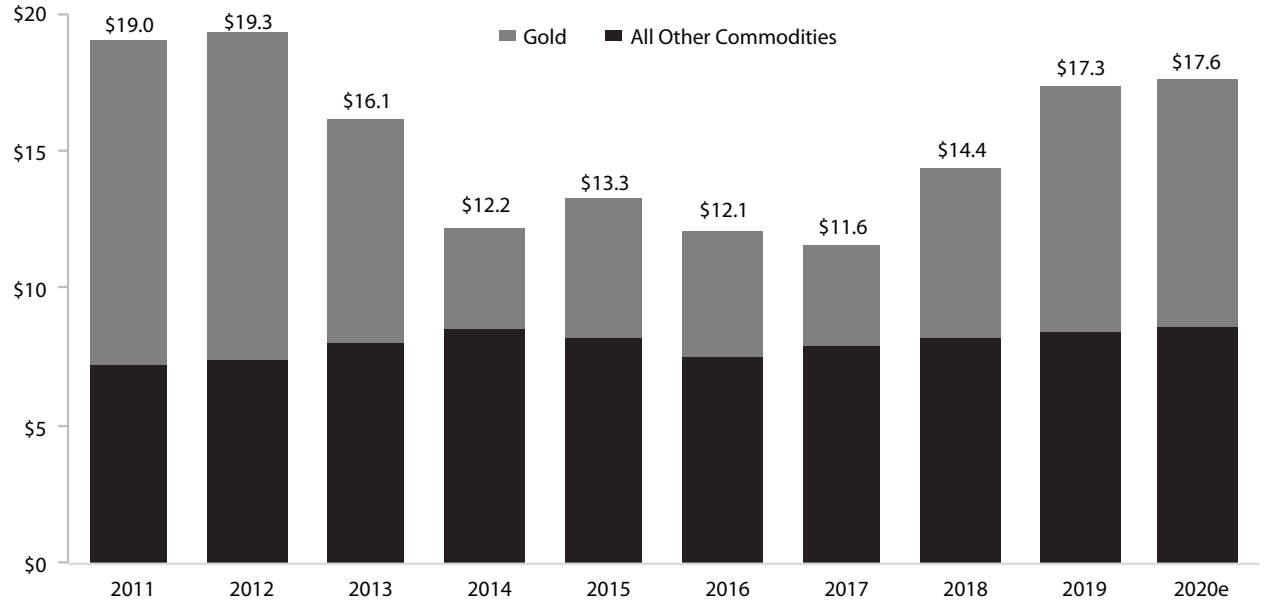
Source: U.S. Bureau of Labor Statistics, Current Employment Statistics

Total Share of Utah Jobs by Sector
2019–2020



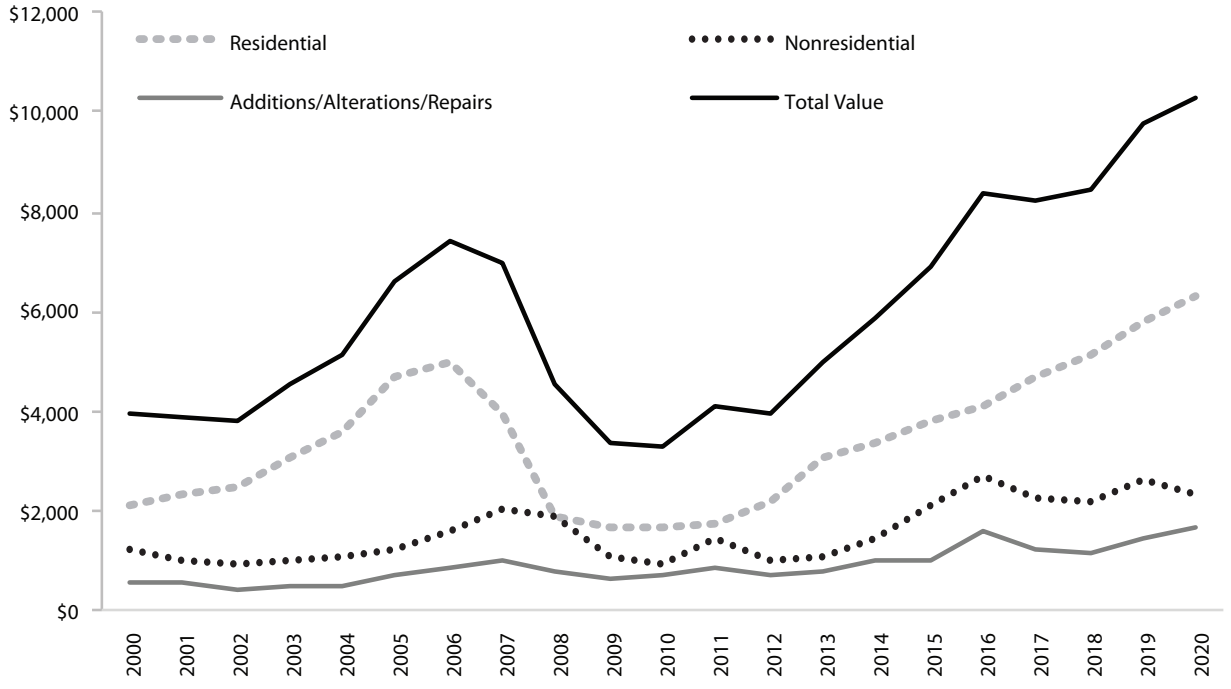
Source: Utah Department of Workforce Services, Workforce Research and Analysis.

Utah International Exports
($ billions)



Source: U.S. Census Bureau, USA Trade Online

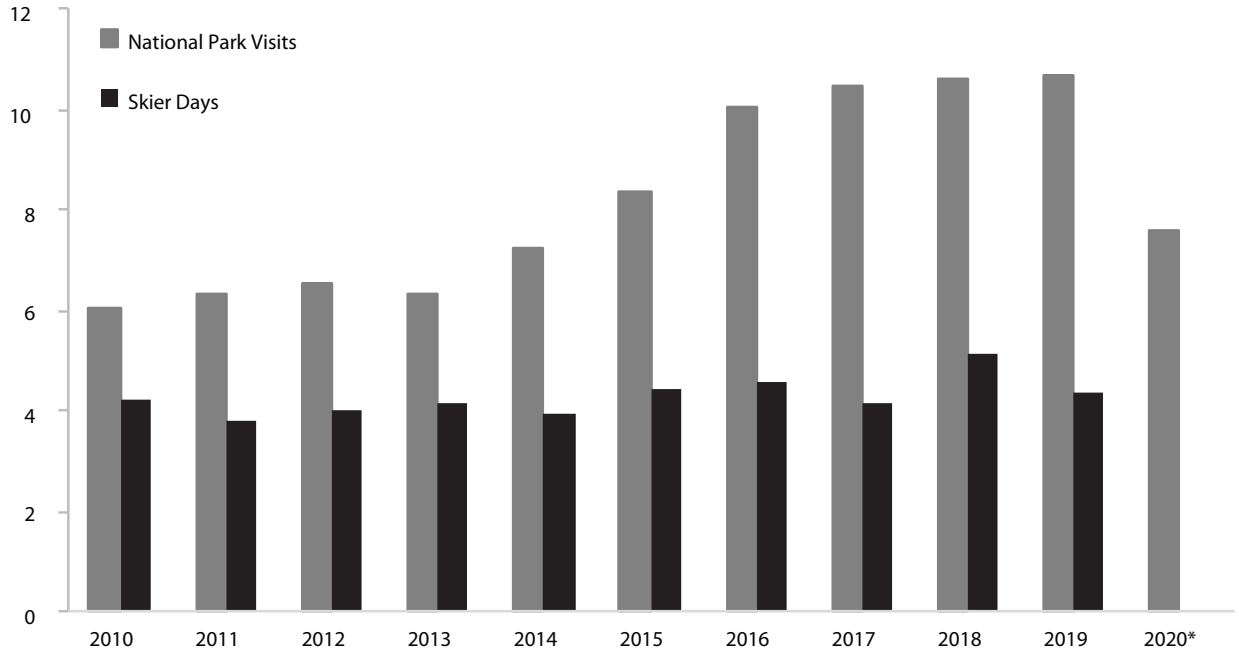
Utah Value of New Construction
($ millions)



Source: Ivory-Boyer Construction Database, Kem C. Gardner Policy Institute

Utah National Park and Skier Visits

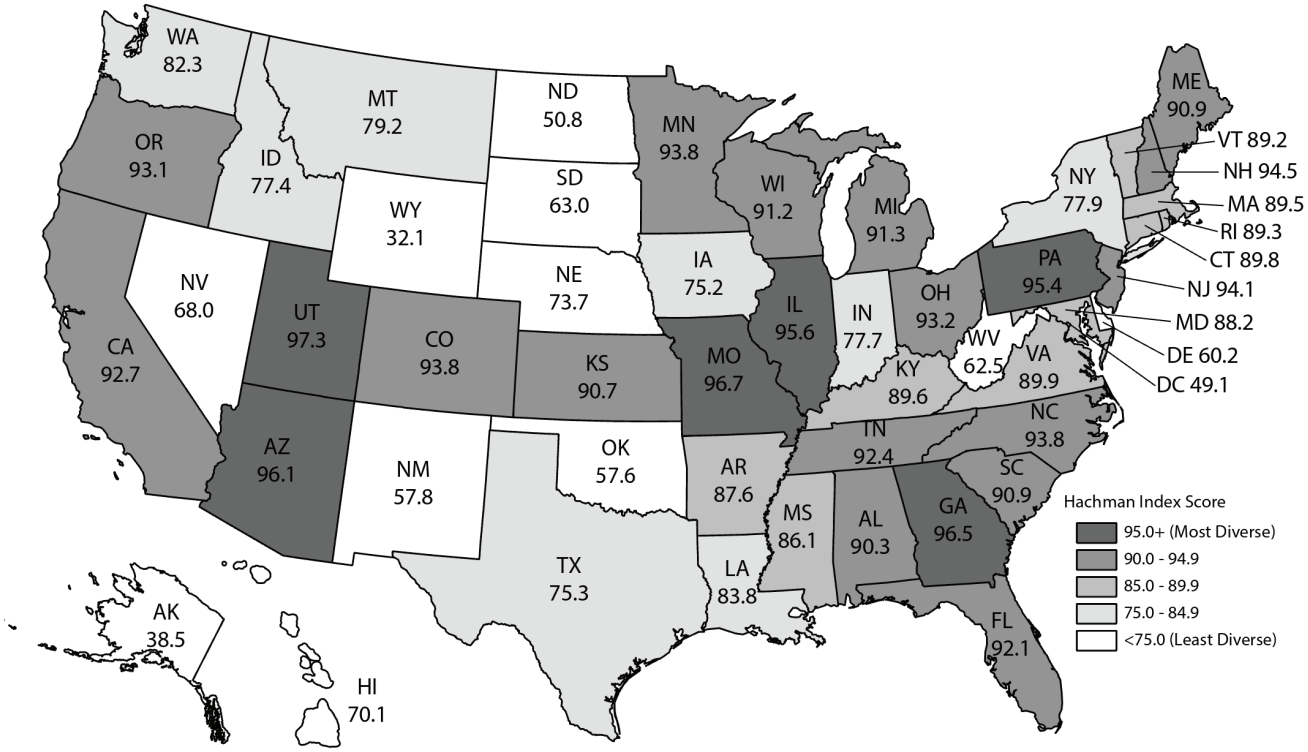
(millions)



* 2020 national park visits are estimated. 2020 skier days will be released in June 2020. Skier days include the season that begins with the year shown (e.g., 2019 = 2019–2020 ski season).
Source: U.S. National Park Service and Ski Utah

Hachman Index of Diversity

2019



Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Economic Analysis GDP data

Demographics

1

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2020 OVERVIEW

While 2020 was full of significant and unexpected events, the available data typically reflects only the first half of the year. A 1.64% growth rate between 2019 and 2020 indicates growth consistent with the last several years. Net in-migration increased slightly. Natural increase continued to decline while remaining positive. Utahns are continuing to age and become more diverse.

State Population Estimates

Utah's population grew by 52,829 and reached 3,273,000 by July 1, 2020, according to preliminary estimates prepared by the Utah Population Committee (UPC). This annual growth rate of 1.64% is barely lower than the previous year's percent growth, 1.69%. The 2020 estimates are preliminary and will be revised once Census 2020 data are released in late spring, 2021.

This moderated growth translates to an increase of 509,000 new Utahns since 2010. Census Bureau estimates indicate that Utah was the fastest-growing state in the nation throughout the decade at 17.6%. Since 2010, net migration (in-migration minus out-migration) contributed 35% of Utah's population growth. This year marked the largest influence of net migration in year-over-year growth, contributing 48%. While natural increase remains the larger contributor to statewide growth, contributing 27,573 persons, which is over half (52%), it has been declining throughout the decade.

Fertility rate

Despite a total fertility rate of 1.99 in the most recent data, Utah's rate only falls behind two other states (South Dakota and North Dakota), Both the total fertility rate and births have declined annually since 2008. Utah's 46,510 births in fiscal year 2020 are at the lowest level since 1999, however the decline has been moderating in recent years.

Age structure

Median age has been increasing nationwide as the Baby Boomer generation, the largest generational group before Millennials, ages. While Utah maintains its rank as the youngest state, its median age has increased from 29.2 years at the 2010 Census to 31.2 years in 2019. The national median age increased from 37.2 to 38.5 over this same period.

Differential age structures of the two largest generational groups, Baby Boomers and Millennials, illustrate Utah's younger population. The median age of both Utah's Baby Boomers and Millennials are younger than their national counterparts.

Utah's dependency ratio decreased slightly, from 68.3 in 2018 to 67.8 in 2019. This shift moved Utah from having the third-highest dependency ratio to 11th. A more significant decrease in the child-age ratio (from 49.6 to 48.7) than the increase to old-age dependency ratio (from 18.7 to 19.1) drove the overall reduction.

Households and housing units

There were an estimated 3.08 people in an average Utah household in 2019, the highest in the nation. This increase converges toward the 3.10 average household size in 2010, decreasing from an estimated increase in the first half of the decade. Nationally, an average household is 2.61 persons and has remained consistent for the past several years.

Utah continued to have the most rapid housing unit growth rate among all states in 2019. This 2.2% annual growth rate, which is unchanged from 2017-2018, translates to 23,897 additional housing units. Wasatch, Washington, and Utah counties experienced the most rapid housing unit growth rates between 2018 and 2019. Census Bureau analysis indicates growth in most Utah counties in the past year surpassed the decade average.

Race and Hispanic Origin

The Census Bureau estimates Utah's minority population (measured as the population that is not white alone and non-Hispanic) to be 22.2% of the July 1, 2019 population. San Juan County (55.7%), Salt Lake County (29.7%), and Weber County (24.4%) all had minority shares higher than the state between 2018 and 2019. Since the 2010 Census, the minority share of the population in Salt Lake (25.7%) and Weber (21.7%) counties have increased, while the proportion remained unchanged in San Juan County (56%). The minority population in San Juan County is predominantly the Native American population, while in Salt Lake and Weber counties, the dominant group is the Hispanic or Latino population.

Throughout the decade, growth in racial minorities and the Hispanic or Latino populations accounted for 39.5% of Utah's population increase. The Hispanic or Latino population contributed nearly one-quarter (23.5%) of statewide population growth. The non-Hispanic Asian population contributed 6%, and the non-Hispanic Two or More races population was responsible for 5% of state growth. The annual growth rate for the minority population was consistently higher than the non-Hispanic white population throughout the decade, ranging from 2.5% to 4.0% compared to 1.0% to 1.5%.

County Population Estimates

Several counties experienced significant growth between July 1, 2019 and 2020, according to the UPC estimates. Washington County experienced the highest population percentage increase for the second year in a row at 4.06% (7,328 residents). Utah County had the highest numeric growth, with the addition of an estimated 19,437 residents. Over two-thirds of statewide growth was in Wasatch Front counties.

Net migration drives population increase in the high growth counties. Historically, natural increase has been the primary source of Utah County's growth, but this is changing. For the second time this decade net migration exceeded natural increase.

Two counties have estimated population loss between 2019 and 2020: Emery and Grand counties. Both counties have a positive natural increase, which indicates the annual population decline is due to more people migrating out of, rather than into, the counties.

Subcounty Populations

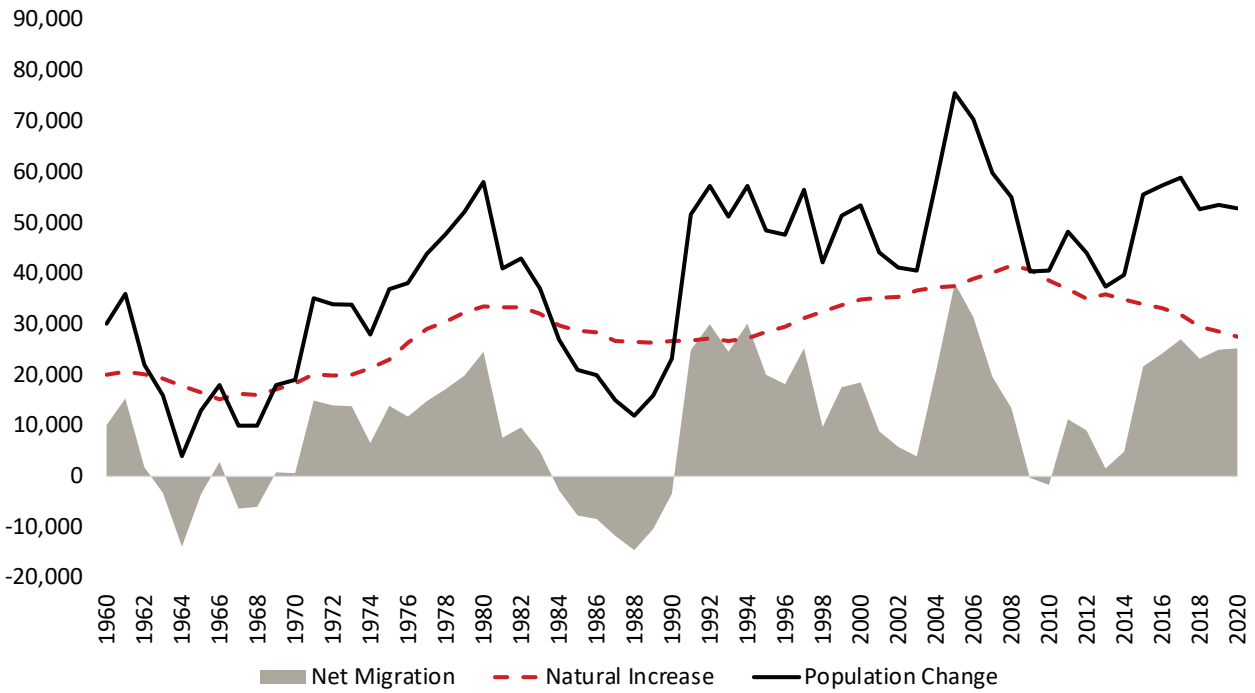
The Census Bureau estimates that four cities have populations exceeding 100,000 in 2019. These include Salt Lake City (200,567), West Valley City (135,248), Provo (116,618), and West Jordan (116,480). From 2018 to 2019, Salt Lake City and West Jordan showed marginal population growth, West Valley City declined slightly, and Provo was essentially unchanged.

For the entire decade, Herriman was ranked the fastest growing city in the nation among those places with a population of at least 50,000. Its population more than doubled since the 2010 census. South Jordan and Lehi were the 12th and 15th fastest in the same population-based categorization. Within the state, most of Utah's fastest-growing cities had populations of 50,000 or less. Vineyard and Bluffdale continued their growth trajectory between 2018 and 2019, with their populations increasing by over 10% in the year. Vineyard's population increased by 18.5% (1,852) and Bluffdale at 11.8% (1,730).

2021 Outlook

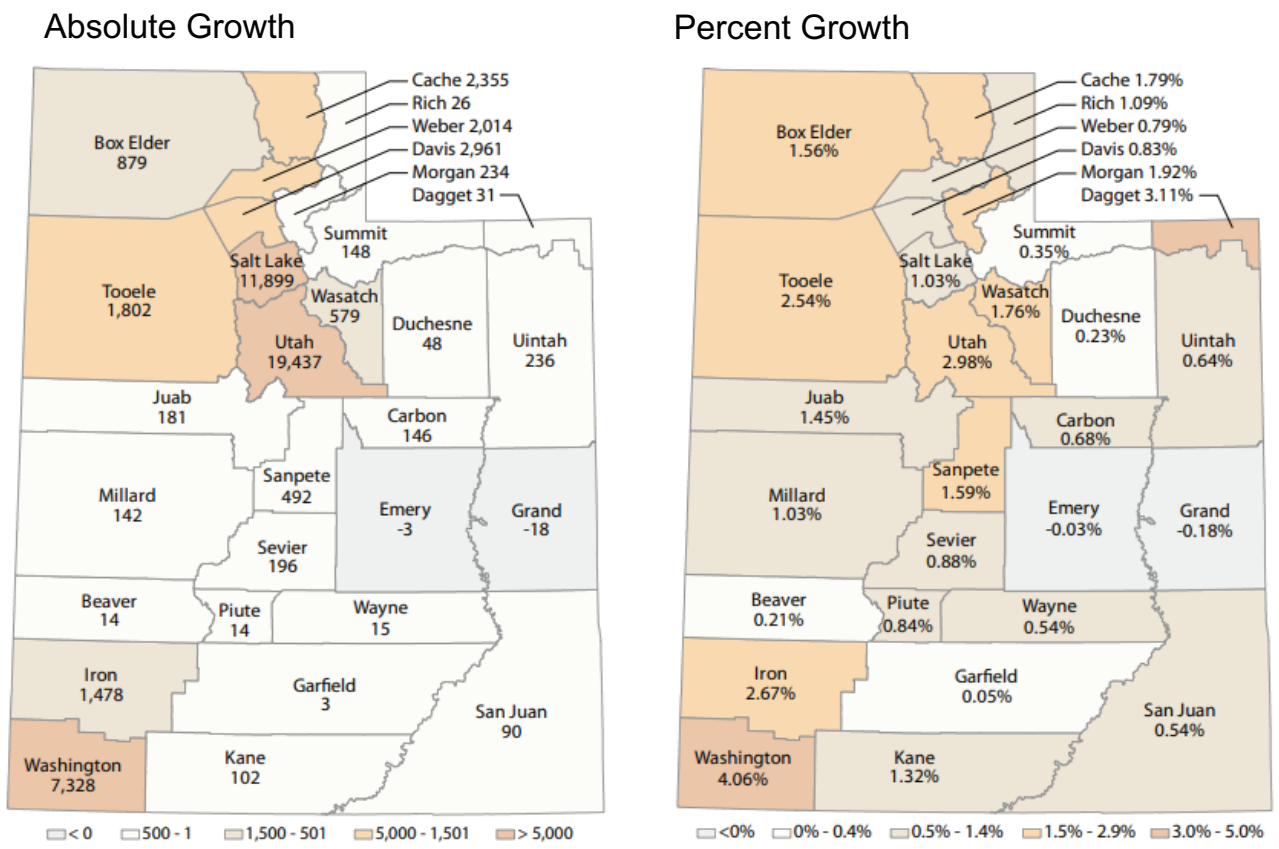
The population will continue to grow at a moderate pace to reach 3,324,500 by July 1, 2021. While both components of change should remain positive, projections indicate the absolute contributions to overall growth to decrease slightly from last year. Natural increase (births minus deaths) will remain slightly more dominant than net migration, contributing 26,500 people to Utah's population. Net migration will continue to be a stable force, contributing 25,000. The 2020 Census apportionment data, scheduled for release early 2021, will provide a new baseline to inform analysis of the 2020 decade.

Figure 1.1: Utah Components of Population Change



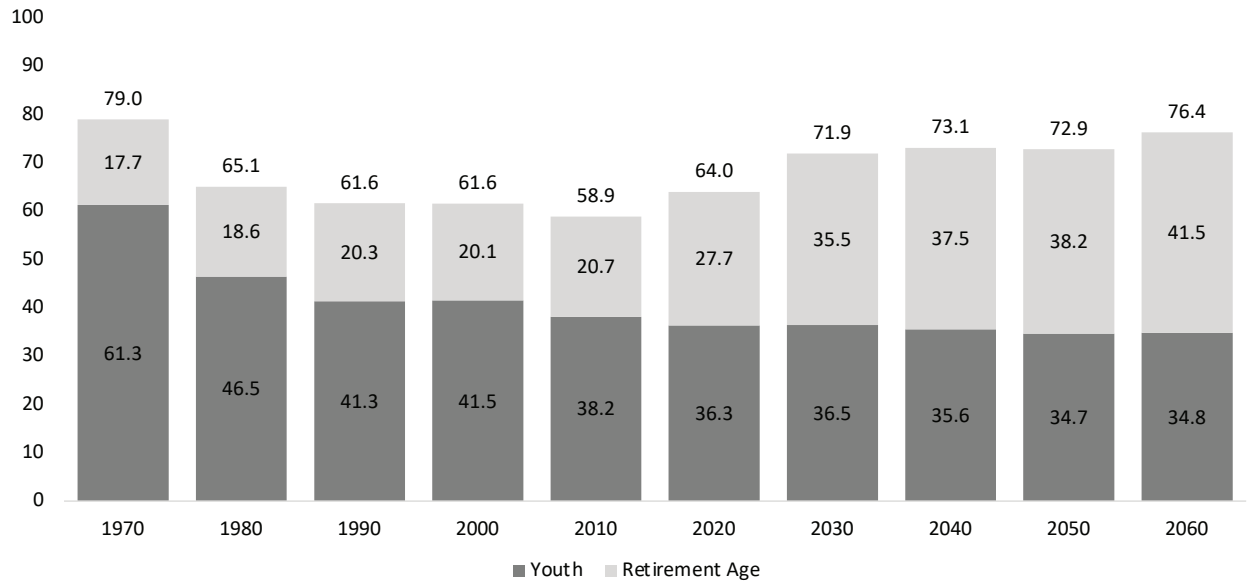
Source: Utah Population Estimates Committee and Utah Population Committee

Figure 1.2: Utah Population Growth by County: 2019–2020



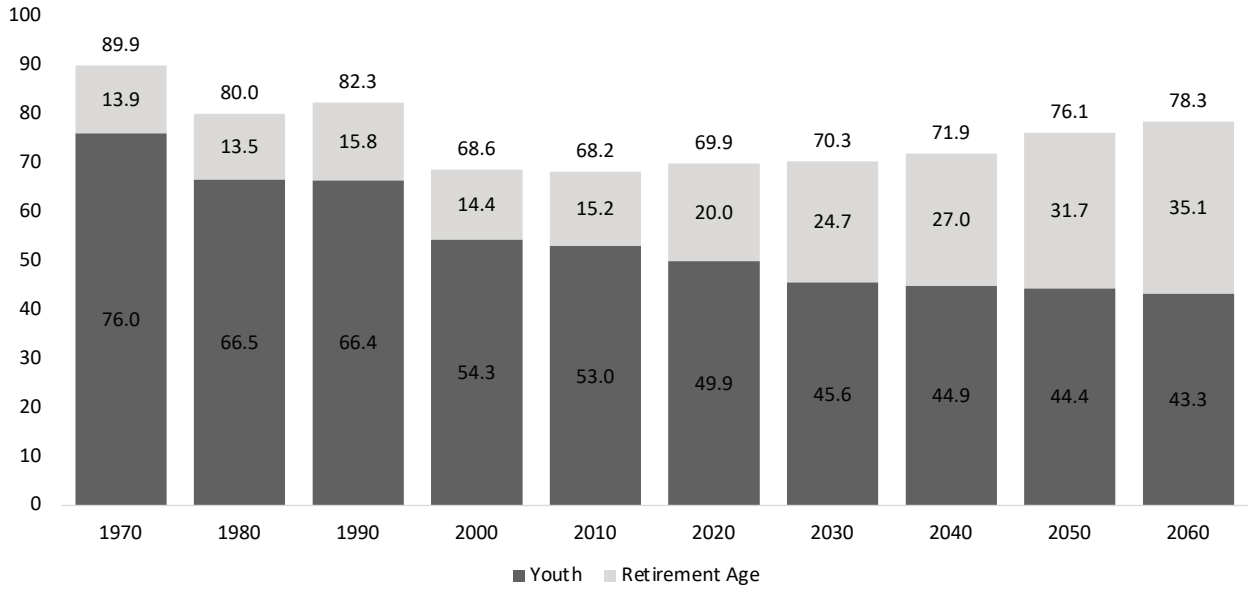
Source: Utah Population Committee

Figure 1.3: U.S. Dependency Ratios: 1970-2060



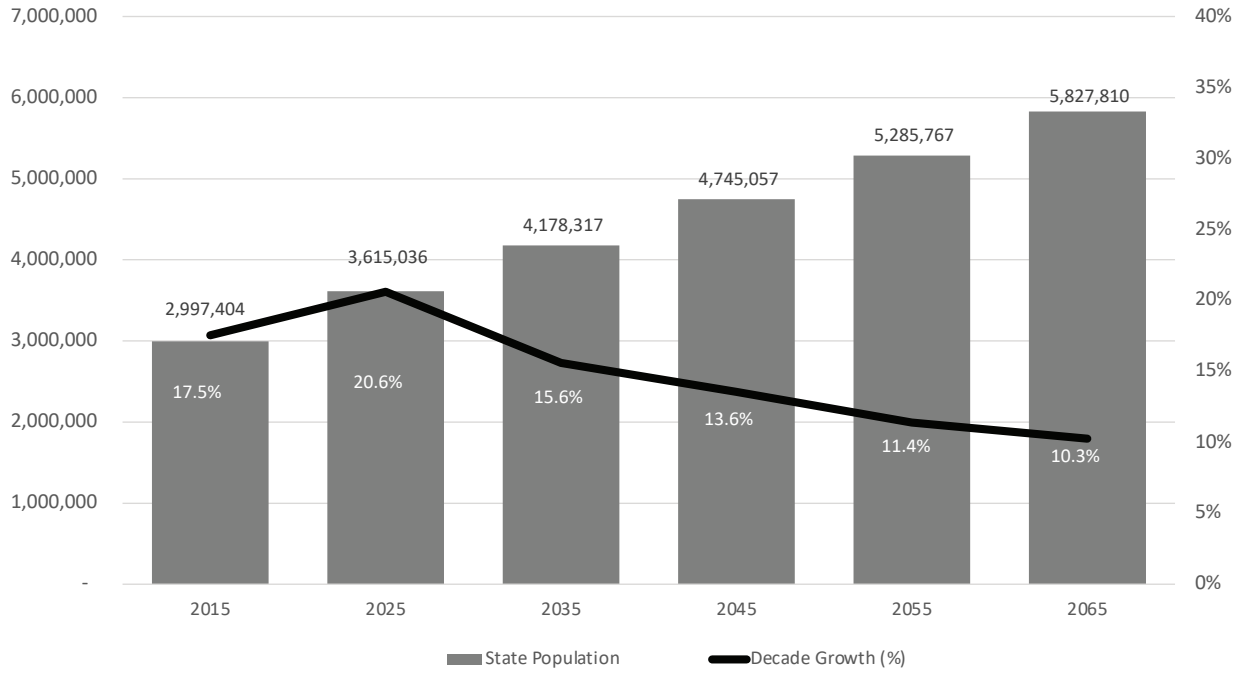
Note: Dependency Ratios are computed as the number of nonworking age persons per 100 working age (18-64 year old) persons in the population. Youth are less than 18 years old and retirement age is 65 years and older.
Source: Kem C. Gardner Policy Institute analysis of U.S. Census Bureau Decennial Census and Population Division data

Figure 1.4: Utah Dependency Ratios: 1970-2060



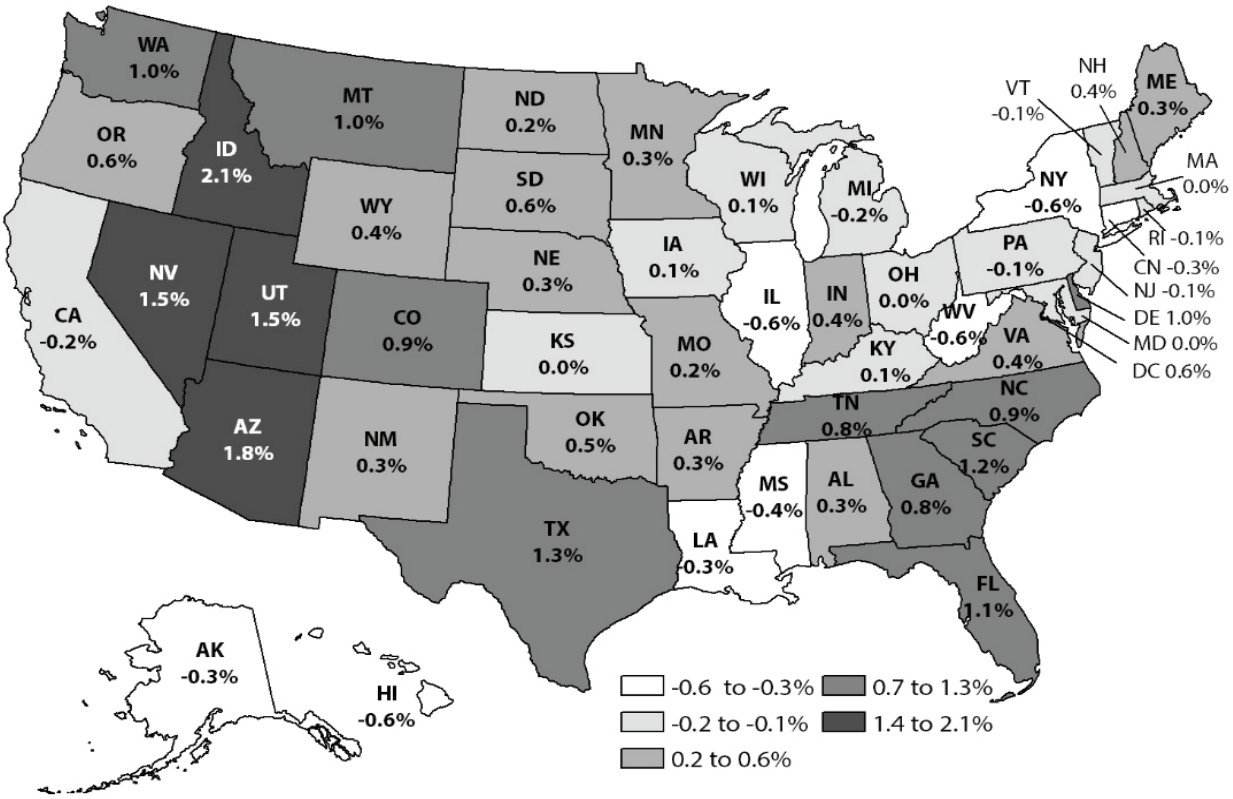
Note: Dependency Ratios are computed as the number of nonworking age persons per 100 working age (18-64 year old) persons in the population. Youth are less than 18 years old and retirement age is 65 years and older.
Source: Kem C. Gardner Policy Institute analysis of U.S. Census Bureau Decennial Census data and Kem C. Gardner Policy Institute State Projections

Figure 1.5: Utah Population and Growth Projections by Decade: 2015-2065



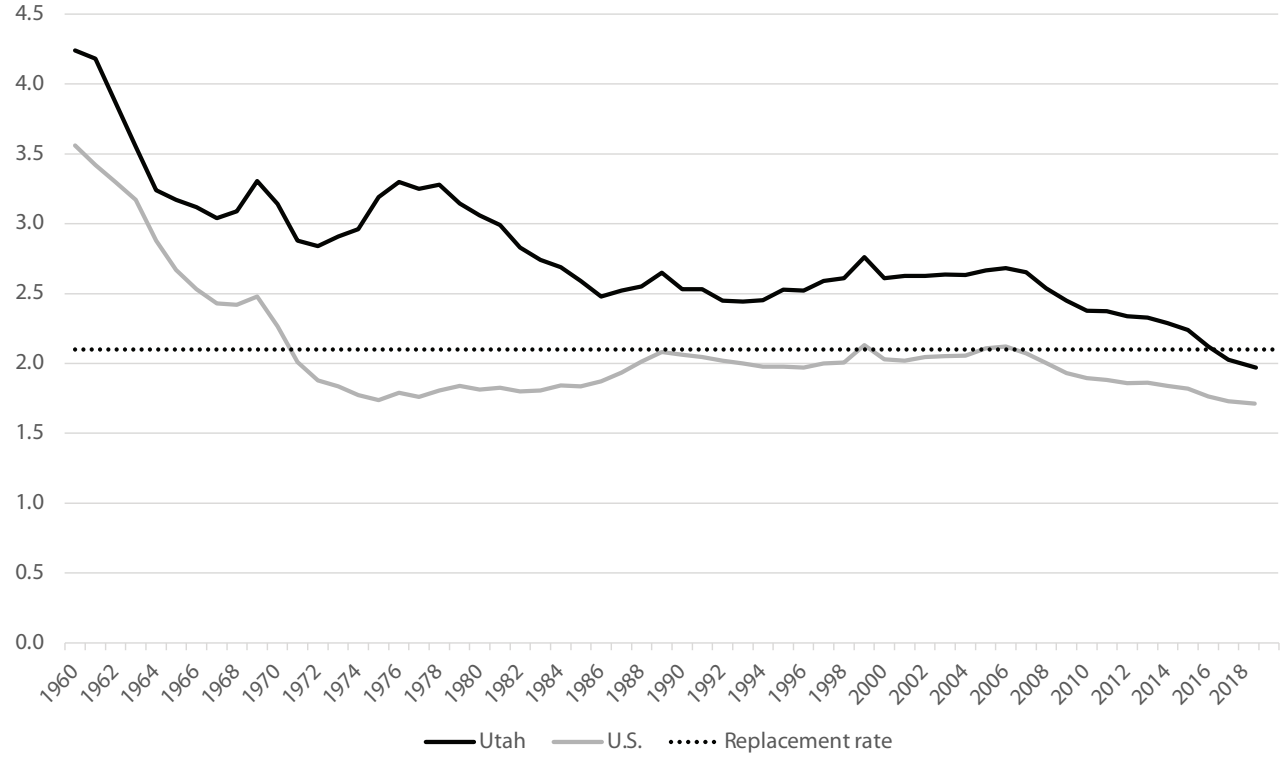
Source: Kem C. Gardner Policy Institute 2015-2065 State and County Projections

Figure 1.6: Annual Rate of Change: July 1, 2019 to July 1, 2020



Source: U.S. Census Bureau, Population Division

Figure 1.7: Total Fertility for Utah and the United States



Note: The Replacement Level is the fertility level at which the current population is replaced. This figure provides the latest available data. 2019 data was not available at time of publication.
Source: National Center for Health Statistics

Table 1.1: Utah Population Estimates by Components of Change

Year	July 1st Population	Percent Change	Increase	Net Migration	Natural Increase	Fiscal Year Births	Fiscal Year Deaths
1980	1,474,000	4.1%	58,050	24,536	33,514	41,645	8,131
1981	1,515,000	2.8%	41,000	7,612	33,388	41,509	8,121
1982	1,558,000	2.8%	43,000	9,662	33,338	41,773	8,435
1983	1,595,000	2.4%	37,000	4,914	32,086	40,555	8,469
1984	1,622,000	1.7%	27,000	-2,793	29,793	38,643	8,850
1985	1,643,000	1.3%	21,000	-7,714	28,714	37,664	8,950
1986	1,663,000	1.2%	20,000	-8,408	28,408	37,309	8,901
1987	1,678,000	0.9%	15,000	-11,713	26,713	35,631	8,918
1988	1,690,000	0.7%	12,000	-14,557	26,557	35,809	9,252
1989	1,706,000	0.9%	16,000	-10,355	26,355	35,439	9,084
1990	1,729,227	1.4%	23,227	-3,480	26,707	35,830	9,123
1991	1,780,870	3.0%	51,643	24,878	26,765	36,194	9,429
1992	1,838,149	3.2%	57,279	30,042	27,237	36,796	9,559
1993	1,889,393	2.8%	51,244	24,561	26,700	36,755	10,055
1994	1,946,721	3.0%	57,328	30,116	27,209	37,619	10,410
1995	1,995,228	2.5%	48,507	20,024	28,496	39,077	10,581
1996	2,042,893	2.4%	47,665	18,171	29,500	40,501	11,001
1997	2,099,409	2.8%	56,516	25,253	31,303	42,548	11,245
1998	2,141,632	2.0%	42,223	9,745	32,423	44,268	11,845
1999	2,193,014	2.4%	51,382	17,584	33,867	45,648	11,781
2000	2,246,468	2.4%	53,454	18,527	34,927	46,880	11,953
2001	2,290,634	2.0%	44,166	8,915	35,251	47,688	12,437
2002	2,331,826	1.8%	41,192	5,813	35,379	48,041	12,662
2003	2,372,458	1.7%	40,632	3,912	36,720	49,518	12,798
2004	2,430,223	2.4%	57,765	20,520	37,245	50,527	13,282
2005	2,505,843	3.1%	75,620	38,108	37,512	50,431	12,919
2006	2,576,229	2.8%	70,386	31,376	39,010	52,368	13,358
2007	2,636,075	2.3%	59,846	19,673	40,173	53,953	13,780
2008	2,691,122	2.1%	55,047	13,470	41,577	55,357	13,780
2009	2,731,560	1.5%	40,438	-325	40,763	54,548	13,785
2010	2,772,371	1.5%	40,569	-1,641	38,597	52,899	14,302
2011	2,820,613	1.7%	48,242	11,300	36,939	51,836	14,897
2012	2,864,744	1.6%	44,132	9,032	35,099	50,388	15,289
2013	2,902,179	1.3%	37,434	1,550	35,885	51,801	15,916
2014	2,941,964	1.4%	39,785	4,919	34,866	50,807	15,941
2015	2,997,584	1.9%	55,620	21,671	33,950	51,024	17,074
2016	3,054,994	1.9%	57,410	24,261	33,149	50,704	17,555
2017	3,113,905	1.9%	58,911	27,013	31,898	49,494	17,596
2018	3,166,587	1.7%	52,682	23,199	29,483	47,628	18,145
2019	3,220,171	1.7%	53,584	25,009	28,575	47,115	18,540
2020*	3,273,000	1.6%	52,829	25,256	27,573	46,510	18,937

* The 2020 Estimates are preliminary and will be revised upon receipt of the 2020 Census enumeration data. New intercensal and postcensal estimates will be released in late spring, 2021.

Note: 1. In 1996, the Utah Population Estimates Committee changed the convention on rounded estimates so it published unrounded estimates. Accordingly, the revised estimates for 1990 and thereafter are not rounded.

2. The Utah Population Estimates Committee revised the population estimates for the years from 2000 to 2009 following the results of the 2010 Census.

3. Data in this table may differ from other tables due to different sources of data or rounding.

Source: 1980-2009: Utah Population Estimates Committee. 2010-2020: Utah Population Committee, Kem C. Gardner Policy Institute.

Table 1.2: Utah Population Projections by Components of Change

Year	July 1st Population	Percent Change	Increase	Net Migration	Natural Increase	Births	Deaths
2022	3,449,985	1.8%	60,518	38,447	22,071	56,884	18,437
2023	3,507,364	1.7%	57,379	38,505	18,874	57,534	19,029
2024	3,562,226	1.6%	54,861	38,586	16,275	58,201	19,615
2025	3,615,036	1.5%	52,811	38,696	14,115	58,897	20,201
2026	3,669,342	1.5%	54,306	38,833	15,473	59,623	20,790
2027	3,723,441	1.5%	54,099	39,049	15,051	60,430	21,381
2028	3,778,152	1.5%	54,711	39,275	15,436	61,262	21,987
2029	3,833,308	1.5%	55,155	39,507	15,648	62,122	22,614
2030	3,889,310	1.5%	56,003	39,724	16,278	62,984	23,260
2031	3,946,122	1.5%	56,811	39,905	16,906	63,831	23,925
2032	4,004,069	1.5%	57,948	40,046	17,902	64,657	24,611
2033	4,062,343	1.5%	58,273	40,131	18,143	65,449	25,319
2034	4,120,490	1.4%	58,148	40,129	18,019	66,169	26,040
2035	4,178,317	1.4%	57,826	40,036	17,790	66,807	26,771
2036	4,235,865	1.4%	57,548	39,853	17,695	67,362	27,509
2037	4,293,208	1.4%	57,344	39,575	17,768	67,827	28,252
2038	4,350,268	1.3%	57,060	39,223	17,837	68,218	28,995
2039	4,407,155	1.3%	56,887	38,819	18,068	68,555	29,736
2040	4,463,950	1.3%	56,795	38,385	18,411	68,856	30,472
2041	4,520,678	1.3%	56,728	37,937	18,791	69,138	31,201
2042	4,577,247	1.3%	56,569	37,510	19,059	69,432	31,922
2043	4,633,568	1.2%	56,321	37,123	19,198	69,755	32,632
2044	4,689,532	1.2%	55,965	36,772	19,192	70,100	33,328
2045	4,745,057	1.2%	55,525	36,475	19,049	70,478	34,003
2046	4,800,120	1.2%	55,062	36,239	18,823	70,893	34,654
2047	4,854,748	1.1%	54,628	36,062	18,566	71,349	35,287
2048	4,909,089	1.1%	54,341	35,937	18,405	71,845	35,909
2049	4,963,211	1.1%	54,122	35,885	18,236	72,392	36,506
2050	5,017,232	1.1%	54,022	35,903	18,119	72,985	37,082
2051	5,071,236	1.1%	54,004	35,981	18,023	73,623	37,642
2052	5,125,126	1.1%	53,890	36,113	17,777	74,307	38,194
2053	5,178,833	1.0%	53,707	36,291	17,416	75,031	38,741
2054	5,232,327	1.0%	53,495	36,500	16,994	75,785	39,284
2055	5,285,767	1.0%	53,439	36,730	16,710	76,557	39,828
2056	5,339,307	1.0%	53,540	36,966	16,574	77,343	40,377
2057	5,393,004	1.0%	53,696	37,201	16,496	78,139	40,938
2058	5,446,925	1.0%	53,921	37,414	16,507	78,933	41,518
2059	5,501,088	1.0%	54,163	37,595	16,569	79,717	42,123
2060	5,555,423	1.0%	54,335	37,730	16,605	80,485	42,755
2061	5,609,943	1.0%	54,519	37,809	16,711	81,229	43,421
2062	5,664,555	1.0%	54,613	37,825	16,787	81,944	44,119
2063	5,719,145	1.0%	54,590	37,774	16,816	82,624	44,850
2064	5,773,599	1.0%	54,454	37,650	16,804	83,266	45,617
2065	5,827,810	0.9%	54,210	37,452	16,758	83,868	46,416

Note: Data in this table may differ from other tables due to different sources of data or rounding.
Source: Kem C. Gardner Policy Institute 2015-2065 State and County Projections

Table 1.3: Utah Demographic Projections by Selected Age Groups

	Total Population				School Age Population (5-17)			Working Age Population (18-64)			Retirement Age Population (65+)		
Year	Total	Absolute Growth	Growth Rate	Median Age	Total	Absolute Growth	Growth Rate	Total	Absolute Growth	Growth Rate	Total	Absolute Growth	Growth Rate
2022	3,449,985	60,518	1.8%	32.5	712,480	3,938	0.6%	2,027,389	33,934	1.7%	431,420	19,828	4.8%
2023	3,507,364	57,379	1.7%	32.8	715,336	2,856	0.4%	2,060,074	32,684	1.6%	450,715	19,295	4.5%
2024	3,562,226	54,861	1.6%	33.0	717,354	2,019	0.3%	2,091,879	31,805	1.5%	469,232	18,517	4.1%
2025	3,615,036	52,811	1.5%	33.3	718,210	856	0.1%	2,122,790	30,911	1.5%	487,659	18,427	3.9%
2026	3,669,342	54,306	1.5%	33.4	719,678	1,468	0.2%	2,155,321	32,531	1.5%	504,883	17,224	3.5%
2027	3,723,441	54,099	1.5%	33.6	721,751	2,073	0.3%	2,187,581	32,260	1.5%	521,321	16,438	3.3%
2028	3,778,152	54,711	1.5%	33.7	724,517	2,766	0.4%	2,220,156	32,575	1.5%	537,054	15,733	3.0%
2029	3,833,308	55,155	1.5%	33.8	729,200	4,683	0.6%	2,252,342	32,186	1.4%	551,460	14,406	2.7%
2030	3,889,310	56,003	1.5%	34.0	736,180	6,980	1.0%	2,284,097	31,755	1.4%	564,649	13,190	2.4%
2031	3,946,122	56,811	1.5%	34.1	742,719	6,540	0.9%	2,318,155	34,058	1.5%	576,640	11,991	2.1%
2032	4,004,069	57,948	1.5%	34.3	750,959	8,239	1.1%	2,351,322	33,167	1.4%	588,852	12,211	2.1%
2033	4,062,343	58,273	1.5%	34.4	759,942	8,983	1.2%	2,384,111	32,789	1.4%	601,095	12,244	2.1%
2034	4,120,490	58,148	1.4%	34.6	770,334	10,392	1.4%	2,414,778	30,667	1.3%	614,121	13,026	2.2%
2035	4,178,317	57,826	1.4%	34.8	779,026	8,692	1.1%	2,445,419	30,641	1.3%	628,814	14,693	2.4%
2036	4,235,865	57,548	1.4%	34.9	787,890	8,864	1.1%	2,475,620	30,201	1.2%	643,797	14,983	2.4%
2037	4,293,208	57,344	1.4%	35.1	797,104	9,214	1.2%	2,506,546	30,927	1.2%	657,890	14,093	2.2%
2038	4,350,268	57,060	1.3%	35.3	806,637	9,533	1.2%	2,537,729	31,183	1.2%	671,534	13,644	2.1%
2039	4,407,155	56,887	1.3%	35.5	816,444	9,807	1.2%	2,568,245	30,516	1.2%	685,764	14,229	2.1%
2040	4,463,950	56,795	1.3%	35.7	826,429	9,984	1.2%	2,597,226	28,981	1.1%	701,572	15,809	2.3%
2041	4,520,678	56,728	1.3%	35.8	836,467	10,039	1.2%	2,624,934	27,708	1.1%	718,784	17,212	2.5%
2042	4,577,247	56,569	1.3%	36.0	846,377	9,910	1.2%	2,650,884	25,950	1.0%	737,883	19,099	2.7%
2043	4,633,568	56,321	1.2%	36.2	855,987	9,610	1.1%	2,675,796	24,912	0.9%	758,145	20,261	2.7%
2044	4,689,532	55,965	1.2%	36.4	865,150	9,163	1.1%	2,700,610	24,814	0.9%	778,604	20,459	2.7%
2045	4,745,057	55,525	1.2%	36.6	873,751	8,601	1.0%	2,724,245	23,634	0.9%	800,316	21,712	2.8%
2046	4,800,120	55,062	1.2%	36.8	881,707	7,956	0.9%	2,748,346	24,101	0.9%	821,637	21,321	2.7%
2047	4,854,748	54,628	1.1%	36.9	888,990	7,283	0.8%	2,772,936	24,590	0.9%	842,566	20,929	2.5%
2048	4,909,089	54,341	1.1%	37.1	895,633	6,643	0.7%	2,798,125	25,189	0.9%	863,081	20,515	2.4%
2049	4,963,211	54,122	1.1%	37.2	901,673	6,040	0.7%	2,824,301	26,176	0.9%	882,794	19,713	2.3%
2050	5,017,232	54,022	1.1%	37.3	907,179	5,506	0.6%	2,849,739	25,438	0.9%	903,462	20,668	2.3%
2051	5,071,236	54,004	1.1%	37.4	912,247	5,068	0.6%	2,875,047	25,308	0.9%	924,451	20,990	2.3%
2052	5,125,126	53,890	1.1%	37.4	916,968	4,722	0.5%	2,900,854	25,807	0.9%	944,955	20,504	2.2%
2053	5,178,833	53,707	1.0%	37.5	921,447	4,479	0.5%	2,927,033	26,180	0.9%	964,935	19,980	2.1%
2054	5,232,327	53,495	1.0%	37.6	925,810	4,363	0.5%	2,952,816	25,783	0.9%	985,028	20,092	2.1%
2055	5,285,767	53,439	1.0%	37.7	930,229	4,419	0.5%	2,976,951	24,135	0.8%	1,006,482	21,454	2.2%
2056	5,339,307	53,540	1.0%	37.7	934,856	4,627	0.5%	2,999,376	22,424	0.8%	1,029,384	22,902	2.3%
2057	5,393,004	53,696	1.0%	37.8	939,808	4,952	0.5%	3,025,642	26,266	0.9%	1,048,149	18,765	1.8%
2058	5,446,925	53,921	1.0%	37.9	945,186	5,378	0.6%	3,054,385	28,744	1.0%	1,064,146	15,997	1.5%
2059	5,501,088	54,163	1.0%	38.0	951,062	5,876	0.6%	3,084,598	30,213	1.0%	1,078,369	14,224	1.3%
2060	5,555,423	54,335	1.0%	38.0	957,453	6,392	0.7%	3,115,001	30,403	1.0%	1,092,054	13,685	1.3%
2061	5,609,943	54,519	1.0%	38.1	964,370	6,917	0.7%	3,142,583	27,582	0.9%	1,108,251	16,197	1.5%
2062	5,664,555	54,613	1.0%	38.1	971,800	7,430	0.8%	3,167,041	24,459	0.8%	1,127,225	18,975	1.7%
2063	5,719,145	54,590	1.0%	38.2	979,706	7,906	0.8%	3,192,733	25,692	0.8%	1,144,582	17,356	1.5%
2064	5,773,599	54,454	1.0%	38.3	988,034	8,328	0.9%	3,217,796	25,063	0.8%	1,162,154	17,572	1.5%
2065	5,827,810	54,210	0.9%	38.3	996,717	8,683	0.9%	3,241,337	23,542	0.7%	1,180,818	18,664	1.6%

Source: Kem C. Gardner Policy Institute 2015-2065 State and County Projections

Table 1.4: Utah Population Estimates by County

	Census	UPC Estimates											2019-2020		2020
	April 1, 2010	July 1, 2010	July 1, 2011	July 1, 2012	July 1, 2013	July 1, 2014	July 1, 2015	July 1, 2016	July 1, 2017	July 1, 2018	July 1, 2019	July 1, 2020	Absolute Change	Percent Change	% of Total Population
Beaver	6,629	6,643	6,658	6,670	6,754	6,661	6,710	6,782	6,843	6,910	6,976	6,990	14	0.2%	0.2%
Box Elder	49,975	50,067	50,640	51,155	51,795	52,282	52,971	54,040	54,971	55,685	56,328	57,207	879	1.6%	1.7%
Cache	112,656	113,307	115,004	116,404	117,600	118,876	121,873	123,926	126,490	128,887	131,387	133,741	2,354	1.8%	4.1%
Carbon	21,403	21,419	21,505	21,590	21,341	21,203	21,168	21,193	21,209	21,396	21,481	21,628	147	0.7%	0.7%
Daggett	1,059	1,078	1,109	1,114	1,157	1,113	1,114	1,104	974	982	993	1,024	31	3.1%	0.0%
Davis	306,479	307,625	313,280	318,477	324,410	329,842	336,106	342,658	348,763	352,805	356,964	359,925	2,961	0.8%	11.0%
Duchesne	18,607	18,721	19,020	19,696	20,283	20,577	20,822	20,609	20,828	20,850	20,846	20,894	48	0.2%	0.6%
Emery	10,976	11,012	11,128	10,964	10,945	10,845	10,662	10,577	10,672	10,669	10,666	10,663	-3	-0.0%	0.3%
Garfield	5,172	5,171	5,203	5,226	5,220	5,194	5,164	5,191	5,240	5,229	5,226	5,229	3	0.1%	0.2%
Grand	9,225	9,238	9,395	9,529	9,553	9,631	9,764	9,943	10,059	10,262	10,118	10,100	-18	-0.2%	0.3%
Iron	46,163	46,221	46,955	47,311	47,622	48,193	49,412	50,747	52,278	54,151	55,401	56,878	1,477	2.7%	1.7%
Juab	10,246	10,280	10,380	10,485	10,604	10,824	11,072	11,542	11,798	12,177	12,454	12,635	181	1.5%	0.4%
Kane	7,125	7,116	7,200	7,302	7,321	7,268	7,272	7,583	7,558	7,718	7,715	7,817	102	1.3%	0.2%
Millard	12,503	12,535	12,706	12,816	12,956	13,023	13,105	13,291	13,477	13,586	13,742	13,884	142	1.0%	0.4%
Morgan	9,469	9,518	9,714	10,049	10,418	10,776	11,081	11,522	11,725	11,963	12,188	12,422	234	1.9%	0.4%
Piute	1,556	1,555	1,576	1,585	1,603	1,594	1,632	1,604	1,607	1,663	1,712	1,726	14	0.8%	0.1%
Rich	2,264	2,278	2,291	2,277	2,300	2,324	2,355	2,357	2,371	2,428	2,398	2,425	27	1.1%	0.1%
Salt Lake	1,029,655	1,031,697	1,046,461	1,060,336	1,070,815	1,080,905	1,094,681	1,108,910	1,128,271	1,142,081	1,152,960	1,164,859	11,899	1.0%	35.6%
San Juan	14,746	14,771	15,037	15,448	15,578	15,782	15,919	16,324	16,333	16,490	16,679	16,769	90	0.5%	0.5%
Sanpete	27,822	27,907	28,351	28,485	28,632	28,705	29,089	29,490	30,032	30,578	31,003	31,494	491	1.6%	1.0%
Sevier	20,802	20,814	20,893	21,053	21,021	21,102	21,240	21,519	21,765	21,928	22,218	22,414	196	0.9%	0.7%
Summit	36,324	36,562	37,396	37,936	38,212	38,678	39,280	40,051	40,771	41,285	41,823	41,970	147	0.4%	1.3%
Tooele	58,218	58,358	59,151	60,131	61,367	62,184	63,266	65,290	67,133	68,858	70,889	72,692	1,803	2.5%	2.2%
Uintah	32,588	32,760	33,943	35,047	36,146	36,981	37,398	36,583	36,612	36,921	36,972	37,208	236	0.6%	1.1%
Utah	516,564	518,872	532,753	544,892	554,405	567,218	585,719	603,385	617,735	633,582	651,407	670,844	19,437	3.0%	20.5%
Wasatch	23,530	23,652	24,484	25,542	26,390	27,344	28,616	29,998	31,224	32,138	32,865	33,444	579	1.8%	1.0%
Washington	138,115	138,579	141,797	144,061	147,061	150,508	154,615	160,371	165,592	171,042	180,549	187,878	7,329	4.1%	5.7%
Wayne	2,778	2,782	2,766	2,773	2,748	2,740	2,725	2,719	2,738	2,752	2,754	2,768	14	0.5%	0.1%
Weber	231,236	231,833	233,819	236,391	237,921	239,588	242,753	245,687	248,835	251,571	253,454	255,468	2,014	0.8%	7.8%
MCD															
Bear River	164,895	165,652	167,935	169,836	171,695	173,482	177,200	180,323	183,832	187,001	190,113	193,373	3,260	1.7%	5.9%
Central	75,707	75,873	76,672	77,197	77,563	77,988	78,863	80,165	81,418	82,683	83,883	84,923	1,040	1.2%	2.6%
Mountainland	576,418	579,086	594,633	608,371	619,007	633,241	653,614	673,433	689,730	707,004	726,095	746,259	20,164	2.8%	22.8%
Southeastern	56,350	56,440	57,065	57,531	57,418	57,462	57,514	58,037	58,273	58,817	58,945	59,160	215	0.4%	1.8%
Southwestern	203,204	203,730	207,812	210,569	213,978	217,825	223,173	230,673	237,511	245,051	255,867	264,792	8,925	3.5%	8.1%
Uintah Basin	52,254	52,559	54,072	55,857	57,586	58,672	59,334	58,295	58,414	58,754	58,811	59,126	315	0.5%	1.8%
Wasatch Front	1,635,057	1,639,031	1,662,423	1,685,383	1,704,932	1,723,295	1,747,887	1,774,067	1,804,727	1,827,277	1,846,456	1,865,366	18,911	1.0%	57.0%
State of Utah	2,763,885	2,772,371	2,820,613	2,864,744	2,902,179	2,941,964	2,997,584	3,054,994	3,113,905	3,166,587	3,220,171	3,273,000	52,829	1.6%	100.0%

Note: The MCDs are multi-county districts and are divided as follows: Bear River MCD: Box Elder, Cache, and Rich counties; Central MCD: Juab, Millard, Piute, Sanpete, Sevier, and Wayne counties; Mountainland MCD: Summit, Utah, and Wasatch counties;Southeastern MCD: Carbon, Emery, Grand, and San Juan counties; Southwestern MCD: Beaver, Garfield, Iron, Kane and Washington counties; Uintah Basin MCD: Daggett, Duchesne, and Uintah counties; Wasatch Front MCD: Davis, Morgan, Salt Lake, Tooele, and Weber counties.

Source: U.S. Census Bureau (April 1, 2010). Utah Population Committee, Kem C. Gardner Policy Institute (2010-2020).

Table 1.5: U.S. Census Bureau National and State Population Estimates

	April 1, 2010		July 1, 2019		July 1, 2020		2010-2020			2019-2020		
	Population	Rank	Population	Rank	Population	Rank	Absolute Change	Percent Change	% Change Rank	Absolute Change	Percent Change	% Change Rank
United States	308,745,538		328,329,953		329,484,123		20,738,585	6.7%		1,154,170	0.4%	
Region												
Northeast	55,317,240	4	56,002,934	4	55,849,869	4	532,629	1.0%	4	-153,065	-0.3%	4
Midwest	66,927,001	3	68,340,091	3	68,316,744	3	1,389,743	2.1%	3	-23,347	-0.0%	3
South	114,555,744	1	125,686,544	1	126,662,754	1	12,107,010	10.6%	1	976,210	0.8%	1
West	71,945,553	2	78,300,384	2	78,654,756	2	6,709,203	9.3%	2	354,372	0.5%	2
State												
Alabama	4,779,736	23	4,907,965	24	4,921,532	24	141,796	3.0%	33	13,567	0.3%	27
Alaska	710,231	47	733,603	48	731,158	48	20,927	2.9%	34	-2,445	-0.3%	46
Arizona	6,392,017	16	7,291,843	14	7,421,401	14	1,029,384	16.1%	6	129,558	1.8%	2
Arkansas	2,915,918	32	3,020,985	33	3,030,522	33	114,604	3.9%	27	9,537	0.3%	25
California	37,253,956	1	39,437,610	1	39,368,078	1	2,114,122	5.7%	23	-69,532	-0.2%	42
Colorado	5,029,196	22	5,758,486	21	5,807,719	21	778,523	15.5%	8	49,233	0.9%	12
Connecticut	3,574,097	29	3,566,022	29	3,557,006	29	-17,091	-0.5%	49	-9,016	-0.3%	44
Delaware	897,934	45	976,668	45	986,809	45	88,875	9.9%	15	10,141	1.0%	9
District of Columbia	601,723	50	708,253	49	712,816	49	111,093	18.5%	1	4,563	0.6%	15
Florida	18,801,310	4	21,492,056	3	21,733,312	3	2,932,002	15.6%	7	241,256	1.1%	7
Georgia	9,687,653	9	10,628,020	8	10,710,017	8	1,022,364	10.6%	14	81,997	0.8%	14
Hawaii	1,360,301	40	1,415,615	40	1,407,006	40	46,705	3.4%	30	-8,609	-0.6%	49
Idaho	1,567,582	39	1,789,060	39	1,826,913	38	259,331	16.5%	4	37,853	2.1%	1
Illinios	12,830,632	5	12,667,017	6	12,587,530	6	-243,102	-1.9%	50	-79,487	-0.6%	50
Indiana	6,483,802	15	6,731,010	17	6,754,953	17	271,151	4.2%	26	23,943	0.4%	22
Iowa	3,046,355	30	3,159,596	31	3,163,561	31	117,206	3.8%	28	3,965	0.1%	32
Kansas	2,853,118	33	2,912,635	35	2,913,805	35	60,687	2.1%	39	1,170	0.0%	34
Kentucky	4,339,367	26	4,472,345	26	4,477,251	26	137,884	3.2%	32	4,906	0.1%	33
Louisiana	4,533,372	25	4,658,285	25	4,645,318	25	111,946	2.5%	37	-12,967	-0.3%	45
Maine	1,328,361	41	1,345,770	42	1,350,141	42	21,780	1.6%	40	4,371	0.3%	23
Maryland	5,773,552	19	6,054,954	19	6,055,802	19	282,250	4.9%	25	848	0.0%	35
Massachusetts	6,547,629	14	6,894,883	15	6,893,574	15	345,945	5.3%	24	-1,309	-0.0%	36
Michigan	9,883,640	8	9,984,795	10	9,966,555	10	82,915	0.8%	43	-18,240	-0.2%	43
Minnesota	5,303,925	21	5,640,053	22	5,657,342	22	353,417	6.7%	20	17,289	0.3%	26
Mississippi	2,967,297	31	2,978,227	34	2,966,786	34	-511	-0.0%	46	-11,441	-0.4%	47
Missouri	5,988,927	18	6,140,475	18	6,151,548	18	162,621	2.7%	35	11,073	0.2%	30
Montana	989,415	44	1,070,123	43	1,080,577	43	91,162	9.2%	17	10,454	1.0%	10
Nebraska	1,826,341	38	1,932,571	37	1,937,552	37	111,211	6.1%	22	4,981	0.3%	28
Nevada	2,700,551	35	3,090,771	32	3,138,259	32	437,708	16.2%	5	47,488	1.5%	3
New Hampshire	1,316,470	42	1,360,783	41	1,366,275	41	49,805	3.8%	29	5,492	0.4%	19
New Jersey	8,791,894	11	8,891,258	11	8,882,371	11	90,477	1.0%	42	-8,887	-0.1%	39
New Mexico	2,059,179	36	2,099,634	36	2,106,319	36	47,140	2.3%	38	6,685	0.3%	24
New York	19,378,102	3	19,463,131	4	19,336,776	4	-41,326	-0.2%	47	-126,355	-0.6%	51
North Carolina	9,535,483	10	10,501,384	9	10,600,823	9	1,065,340	11.2%	12	99,439	0.9%	11
North Dakota	672,591	48	763,724	47	765,309	47	92,718	13.8%	10	1,585	0.2%	29
Ohio	11,536,504	7	11,696,507	7	11,693,217	7	156,713	1.4%	41	-3,290	-0.0%	37
Oklahoma	3,751,351	28	3,960,676	28	3,980,783	28	229,432	6.1%	21	20,107	0.5%	18
Oregon	3,831,074	27	4,216,116	27	4,241,507	27	410,433	10.7%	13	25,391	0.6%	17
Pennsylvania	12,702,379	6	12,798,883	5	12,783,254	5	80,875	0.6%	44	-15,629	-0.1%	41
Rhode Island	1,052,567	43	1,058,158	44	1,057,125	44	4,558	0.4%	45	-1,033	-0.1%	38
South Carolina	4,625,364	24	5,157,702	23	5,218,040	23	592,676	12.8%	11	60,338	1.2%	6
South Dakota	814,180	46	887,127	46	892,717	46	78,537	9.6%	16	5,590	0.6%	16
Tennessee	6,346,105	17	6,830,325	16	6,886,834	16	540,729	8.5%	18	56,509	0.8%	13
Texas	25,145,561	2	28,986,794	2	29,360,759	2	4,215,198	16.8%	3	373,965	1.3%	5
Utah	2,763,885	34	3,203,383	30	3,249,879	30	485,994	17.6%	2	46,496	1.5%	4
Vermont	625,741	49	624,046	50	623,347	50	-2,394	-0.4%	48	-699	-0.1%	40
Virginia	8,001,024	12	8,556,642	12	8,590,563	12	589,539	7.4%	19	33,921	0.4%	20
Washington	6,724,540	13	7,614,024	13	7,693,612	13	969,072	14.4%	9	79,588	1.0%	8
West Virginia	1,852,994	37	1,795,263	38	1,784,787	39	-68,207	-3.7%	51	-10,476	-0.6%	48
Wisconsin	5,686,986	20	5,824,581	20	5,832,655	20	145,669	2.6%	36	8,074	0.1%	31
Wyoming	563,626	51	580,116	51	582,328	51	18,702	3.3%	31	2,212	0.4%	21

Source: U.S. Census Bureau, Population Division, Vintage 2020 Estimates

Table 1.6: Rankings of States by Selected Age Groups as a Percent of Total Population: July 1, 2019

	All Ages		Under Age 5			Ages 5 to 17		
Rank	State	Population	State	Population	Percent of Total	State	Population	Percent of Total
	United States	328,239,523	United States	19,576,683	6.0%	United States	53,462,467	16.3%
1	California	39,512,223	Utah	247,803	7.7%	Utah	683,381	21.3%
2	Texas	28,995,881	North Dakota	54,101	7.1%	Texas	5,408,919	18.7%
3	Florida	21,477,737	Alaska	51,080	7.0%	Idaho	332,001	18.6%
4	New York	19,453,561	South Dakota	61,167	6.9%	Nebraska	345,194	17.8%
5	Pennsylvania	12,801,989	Texas	1,990,891	6.9%	Kansas	514,919	17.7%
6	Illinois	12,671,821	Nebraska	130,880	6.8%	South Dakota	155,934	17.6%
7	Ohio	11,689,100	Idaho	116,200	6.5%	Alaska	128,903	17.6%
8	Georgia	10,617,423	Louisiana	301,469	6.5%	Oklahoma	696,705	17.6%
9	North Carolina	10,488,084	Oklahoma	255,533	6.5%	Georgia	1,847,315	17.4%
10	Michigan	9,986,857	District of Columbia	45,368	6.4%	Mississippi	515,105	17.3%
11	New Jersey	8,882,190	Kansas	185,331	6.4%	Indiana	1,149,634	17.1%
12	Virginia	8,535,519	Arkansas	188,464	6.2%	Wyoming	98,803	17.1%
13	Washington	7,614,893	Minnesota	351,622	6.2%	Arkansas	511,691	17.0%
14	Arizona	7,278,717	Indiana	418,340	6.2%	New Mexico	354,852	16.9%
15	Massachusetts	6,892,503	Iowa	195,636	6.2%	Louisiana	786,161	16.9%
16	Tennessee	6,829,174	Georgia	656,566	6.2%	Minnesota	951,535	16.9%
17	Indiana	6,732,219	Mississippi	183,478	6.2%	Iowa	531,205	16.8%
18	Missouri	6,137,428	Kentucky	272,610	6.1%	Arizona	1,210,448	16.6%
19	Maryland	6,045,680	Wyoming	34,931	6.0%	North Dakota	126,070	16.5%
20	Wisconsin	5,822,434	California	2,383,716	6.0%	California	6,510,925	16.5%
21	Colorado	5,758,736	Nevada	185,575	6.0%	Nevada	507,064	16.5%
22	Minnesota	5,639,632	Hawaii	85,219	6.0%	Kentucky	730,261	16.3%
23	South Carolina	5,148,714	Alabama	294,357	6.0%	Illinois	2,070,941	16.3%
24	Alabama	4,903,185	Missouri	368,080	6.0%	Missouri	1,002,505	16.3%
25	Louisiana	4,648,794	Washington	456,476	6.0%	Alabama	793,949	16.2%
26	Kentucky	4,467,673	Maryland	361,937	6.0%	Ohio	1,887,191	16.1%
27	Oregon	4,217,737	Tennessee	408,605	6.0%	Tennessee	1,101,446	16.1%
28	Oklahoma	3,956,971	Virginia	505,477	5.9%	North Carolina	1,690,945	16.1%
29	Connecticut	3,565,287	Ohio	690,828	5.9%	Colorado	927,318	16.1%
30	Utah	3,205,958	Arizona	429,788	5.9%	Maryland	972,750	16.1%
31	Iowa	3,155,070	Illinois	746,934	5.9%	Wisconsin	936,101	16.1%
32	Nevada	3,080,156	North Carolina	609,770	5.8%	New Jersey	1,423,888	16.0%
33	Arkansas	3,017,804	New Jersey	514,690	5.8%	South Carolina	818,719	15.9%
34	Mississippi	2,976,149	New York	1,127,001	5.8%	Virginia	1,355,371	15.9%
35	Kansas	2,913,314	New Mexico	120,986	5.8%	Washington	1,206,585	15.8%
36	New Mexico	2,096,829	Colorado	332,201	5.8%	Michigan	1,577,491	15.8%
37	Nebraska	1,934,408	Montana	61,156	5.7%	Montana	167,432	15.7%
38	West Virginia	1,792,147	South Carolina	292,464	5.7%	Connecticut	545,730	15.3%
39	Idaho	1,787,065	Wisconsin	330,496	5.7%	Delaware	148,853	15.3%
40	Hawaii	1,415,872	Michigan	566,442	5.7%	Hawaii	214,649	15.2%
41	New Hampshire	1,359,711	Delaware	54,719	5.6%	Oregon	638,751	15.1%
42	Maine	1,344,212	Pennsylvania	697,924	5.5%	Pennsylvania	1,936,689	15.1%
43	Montana	1,068,778	Oregon	227,811	5.4%	New York	2,901,298	14.9%
44	Rhode Island	1,059,361	Florida	1,139,742	5.3%	West Virginia	266,542	14.9%
45	Delaware	973,764	West Virginia	93,025	5.2%	Massachusetts	995,438	14.4%
46	South Dakota	884,659	Massachusetts	357,362	5.2%	Florida	3,090,187	14.4%
47	North Dakota	762,062	Rhode Island	54,521	5.1%	Rhode Island	149,974	14.2%
48	Alaska	731,545	Connecticut	181,710	5.1%	New Hampshire	191,632	14.1%
49	District of Columbia	705,749	Maine	63,537	4.7%	Maine	185,305	13.8%
50	Vermont	623,989	New Hampshire	63,621	4.7%	Vermont	84,962	13.6%
51	Wyoming	578,759	Vermont	29,043	4.7%	District of Columbia	82,800	11.7%

Note: Totals may differ in this table from other tables in this report due to different release dates or data sources.
Source: U.S. Census Bureau, Population Division, Vintage 2019 Estimates

Table 1.6 (Continued): Rankings of States by Selected Age Groups as a Percent of Total Population: July 1, 2019

Ages 18 to 64			Ages 65+				
State	Population	Percent of Total	State	Population	Percent of Total	State	Median Age
United States	201,142,110	61.3%	United States	54,058,263	16.5%	United States	38.4
District of Columbia	490,238	69.5%	Maine	285,265	21.2%	Maine	45.0
Colorado	3,656,805	63.5%	Florida	4,497,337	20.9%	New Hampshire	43.1
Massachusetts	4,370,371	63.4%	West Virginia	367,011	20.5%	Vermont	43.0
Rhode Island	667,820	63.0%	Vermont	125,039	20.0%	West Virginia	42.9
Alaska	459,974	62.9%	Delaware	188,906	19.4%	Florida	42.5
California	24,779,467	62.7%	Montana	206,437	19.3%	Connecticut	41.1
New Hampshire	850,594	62.6%	Hawaii	268,448	19.0%	Delaware	41.1
New York	12,129,116	62.3%	Pennsylvania	2,393,362	18.7%	Pennsylvania	40.8
Virginia	5,315,765	62.3%	New Hampshire	253,864	18.7%	Montana	40.1
Washington	4,742,109	62.3%	South Carolina	937,023	18.2%	New Jersey	40.1
Georgia	6,596,588	62.1%	Oregon	766,080	18.2%	Rhode Island	40.1
Maryland	3,751,597	62.1%	New Mexico	377,606	18.0%	Michigan	39.9
Connecticut	2,207,603	61.9%	Arizona	1,308,633	18.0%	South Carolina	39.9
Vermont	384,945	61.7%	Michigan	1,765,401	17.7%	Wisconsin	39.8
Illinois	7,810,714	61.6%	Connecticut	630,244	17.7%	Hawaii	39.6
Texas	17,861,842	61.6%	Rhode Island	187,046	17.7%	Massachusetts	39.6
New Jersey	5,468,077	61.6%	Iowa	552,954	17.5%	Oregon	39.6
Nevada	1,891,545	61.4%	Ohio	2,046,320	17.5%	Ohio	39.5
North Carolina	6,436,275	61.4%	Wisconsin	1,017,243	17.5%	Alabama	39.4
Oregon	2,585,095	61.3%	Arkansas	523,882	17.4%	New York	39.2
Tennessee	4,175,730	61.1%	Alabama	849,837	17.3%	Kentucky	39.1
Michigan	6,077,523	60.9%	Missouri	1,062,037	17.3%	Maryland	39.1
Wisconsin	3,538,594	60.8%	South Dakota	151,871	17.2%	North Carolina	39.1
Kentucky	2,714,238	60.8%	Wyoming	99,179	17.1%	Tennessee	39.0
Pennsylvania	7,774,014	60.7%	Massachusetts	1,169,332	17.0%	Missouri	38.9
Louisiana	2,820,142	60.7%	New York	3,296,146	16.9%	Illinois	38.6
North Dakota	462,046	60.6%	Kentucky	750,564	16.8%	Virginia	38.6
Indiana	4,078,502	60.6%	Tennessee	1,143,393	16.7%	Arkansas	38.5
Minnesota	3,416,093	60.6%	North Carolina	1,751,094	16.7%	Iowa	38.5
Alabama	2,965,042	60.5%	New Jersey	1,475,535	16.6%	New Mexico	38.4
Ohio	7,064,761	60.4%	Mississippi	486,693	16.4%	Wyoming	38.4
Missouri	3,704,806	60.4%	Kansas	475,487	16.3%	Minnesota	38.3
Maine	810,105	60.3%	Minnesota	920,382	16.3%	Nevada	38.3
South Carolina	3,100,508	60.2%	Idaho	290,670	16.3%	Arizona	38.2
Mississippi	1,790,873	60.2%	Nebraska	312,458	16.2%	Mississippi	38.0
Oklahoma	2,369,601	59.9%	Indiana	1,085,743	16.1%	Indiana	37.9
Hawaii	847,556	59.9%	Illinois	2,043,232	16.1%	Washington	37.8
Wyoming	345,846	59.8%	Nevada	495,972	16.1%	Louisiana	37.5
Delaware	581,286	59.7%	Oklahoma	635,132	16.1%	South Dakota	37.4
Kansas	1,737,577	59.6%	Louisiana	741,022	15.9%	Colorado	37.1
Utah	1,908,902	59.5%	Virginia	1,358,906	15.9%	Georgia	37.1
Arizona	4,329,848	59.5%	Washington	1,209,723	15.9%	Kansas	37.1
West Virginia	1,065,569	59.5%	Maryland	959,396	15.9%	California	37.0
Arkansas	1,793,767	59.4%	North Dakota	119,845	15.7%	Idaho	36.9
Iowa	1,875,275	59.4%	California	5,838,115	14.8%	Oklahoma	36.9
Florida	12,750,471	59.4%	Colorado	842,412	14.6%	Nebraska	36.8
New Mexico	1,243,385	59.3%	Georgia	1,516,954	14.3%	North Dakota	35.3
Montana	633,753	59.3%	Texas	3,734,229	12.9%	Alaska	35.0
Nebraska	1,145,876	59.2%	Alaska	91,588	12.5%	Texas	35.0
Idaho	1,048,194	58.7%	District of Columbia	87,343	12.4%	District of Columbia	34.2
South Dakota	515,687	58.3%	Utah	365,872	11.4%	Utah	31.3

Note: Totals may differ in this table from other tables in this report due to different release dates or data sources.
Source: U.S. Census Bureau, Population Division, Vintage 2019 Estimates

Table 1.7: Dependency Ratios by State: July 1, 2019

Rank	Preschool-Age (Under Age 5) per 100 of Working Age		School-Age (5-17) per 100 of Working Age		Retirement-Age (65 & Over) per 100 of Working Age		Total Non-Working Age per 100 of Working Age	
	United States	9.7	United States	26.6	United States	26.9	United States	63.2
1	Utah	13.0	Utah	35.8	Florida	35.3	South Dakota	71.5
2	South Dakota	11.9	Idaho	31.7	Maine	35.2	Idaho	70.5
3	North Dakota	11.7	Texas	30.3	West Virginia	34.4	Nebraska	68.8
4	Nebraska	11.4	South Dakota	30.2	Montana	32.6	Montana	68.6
5	Texas	11.1	Nebraska	30.1	Delaware	32.5	New Mexico	68.6
6	Alaska	11.1	Kansas	29.6	Vermont	32.5	Florida	68.4
7	Idaho	11.1	Oklahoma	29.4	Hawaii	31.7	Iowa	68.2
8	Oklahoma	10.8	Mississippi	28.8	Pennsylvania	30.8	Arkansas	68.2
9	Louisiana	10.7	Wyoming	28.6	New Mexico	30.4	West Virginia	68.2
10	Kansas	10.7	New Mexico	28.5	Arizona	30.2	Arizona	68.1
11	Arkansas	10.5	Arkansas	28.5	South Carolina	30.2	Utah	67.9
12	Iowa	10.4	Iowa	28.3	New Hampshire	29.8	Kansas	67.7
13	Minnesota	10.3	Indiana	28.2	Oregon	29.6	Delaware	67.5
14	Indiana	10.3	Alaska	28.0	Iowa	29.5	Wyoming	67.3
15	Mississippi	10.2	Georgia	28.0	South Dakota	29.5	Hawaii	67.1
16	Wyoming	10.1	Arizona	28.0	Arkansas	29.2	Oklahoma	67.0
17	Hawaii	10.1	Louisiana	27.9	Michigan	29.0	Mississippi	66.2
18	Kentucky	10.0	Minnesota	27.9	Ohio	29.0	South Carolina	66.1
19	Georgia	10.0	North Dakota	27.3	Wisconsin	28.7	Maine	65.9
20	Missouri	9.9	Missouri	27.1	Wyoming	28.7	Missouri	65.7
21	Alabama	9.9	Kentucky	26.9	Missouri	28.7	Ohio	65.5
22	Arizona	9.9	Nevada	26.8	Alabama	28.7	Alabama	65.4
23	Nevada	9.8	Alabama	26.8	Connecticut	28.5	Minnesota	65.1
24	Tennessee	9.8	Ohio	26.7	Rhode Island	28.0	Indiana	65.1
25	Ohio	9.8	Illinois	26.5	Idaho	27.7	North Dakota	64.9
26	New Mexico	9.7	Wisconsin	26.5	Kentucky	27.7	Louisiana	64.8
27	Montana	9.6	Montana	26.4	Tennessee	27.4	Pennsylvania	64.7
28	Maryland	9.6	South Carolina	26.4	Kansas	27.4	Kentucky	64.6
29	Washington	9.6	Tennessee	26.4	Nebraska	27.3	Wisconsin	64.5
30	California	9.6	California	26.3	North Carolina	27.2	Michigan	64.3
31	Illinois	9.6	North Carolina	26.3	Mississippi	27.2	Tennessee	63.5
32	Virginia	9.5	New Jersey	26.0	New York	27.2	Oregon	63.2
33	North Carolina	9.5	Michigan	26.0	New Jersey	27.0	North Carolina	63.0
34	South Carolina	9.4	Maryland	25.9	Minnesota	26.9	Nevada	62.8
35	Delaware	9.4	Delaware	25.6	Oklahoma	26.8	New Jersey	62.4
36	New Jersey	9.4	Virginia	25.5	Massachusetts	26.8	Texas	62.3
37	Wisconsin	9.3	Washington	25.4	Indiana	26.6	Illinois	62.2
38	Michigan	9.3	Colorado	25.4	Louisiana	26.3	Vermont	62.1
39	New York	9.3	Hawaii	25.3	Nevada	26.2	Connecticut	61.5
40	District of Columbia	9.3	West Virginia	25.0	Illinois	26.2	Maryland	61.1
41	Colorado	9.1	Pennsylvania	24.9	North Dakota	25.9	Georgia	61.0
42	Pennsylvania	9.0	Connecticut	24.7	Maryland	25.6	Washington	60.6
43	Florida	8.9	Oregon	24.7	Virginia	25.6	Virginia	60.6
44	Oregon	8.8	Florida	24.2	Washington	25.5	New York	60.4
45	West Virginia	8.7	New York	23.9	California	23.6	New Hampshire	59.9
46	Connecticut	8.2	Maine	22.9	Colorado	23.0	California	59.5
47	Massachusetts	8.2	Massachusetts	22.8	Georgia	23.0	Alaska	59.0
48	Rhode Island	8.2	New Hampshire	22.5	Texas	20.9	Rhode Island	58.6
49	Maine	7.8	Rhode Island	22.5	Alaska	19.9	Massachusetts	57.7
50	Vermont	7.5	Vermont	22.1	Utah	19.2	Colorado	57.5
51	New Hampshire	7.5	District of Columbia	16.9	District of Columbia	17.8	District of Columbia	44.0

Source: U.S. Census Bureau, Population Division, Vintage 2019 Estimates; rate calculated by the Kem C. Gardner Policy Institute

Table 1.8: Total Fertility Rates for Utah and the United States

Year	Utah	U.S.
1960	4.30	3.61
1961	4.24	3.56
1962	4.18	3.42
1963	3.87	3.30
1964	3.55	3.17
1965	3.24	2.88
1966	3.17	2.67
1967	3.12	2.53
1968	3.04	2.43
1969	3.09	2.42
1970	3.30	2.48
1971	3.14	2.27
1972	2.88	2.01
1973	2.84	1.88
1974	2.91	1.84
1975	2.96	1.77
1976	3.19	1.74
1977	3.30	1.79
1978	3.25	1.76
1979	3.28	1.81
1980	3.14	1.84
1981	3.06	1.81
1982	2.99	1.83
1983	2.83	1.80
1984	2.74	1.81
1985	2.69	1.84
1986	2.59	1.84
1987	2.48	1.87
1988	2.52	1.93
1989	2.55	2.01
1990	2.65	2.08
1991	2.53	2.06
1992	2.53	2.05
1993	2.45	2.02
1994	2.44	2.00
1995	2.45	1.98
1996	2.53	1.98
1997	2.52	1.97
1998	2.59	2.00
1999	2.61	2.01
2000	2.76	2.13
2001	2.61	2.03
2002	2.63	2.02
2003	2.63	2.05
2004	2.64	2.05
2005	2.63	2.06
2006	2.67	2.11
2007	2.68	2.12
2008	2.65	2.07
2009	2.54	2.00
2010	2.45	1.93
2011	2.38	1.89
2012	2.37	1.88
2013	2.34	1.86
2014	2.33	1.86
2015	2.29	1.84
2016	2.24	1.82
2017	2.12	1.77
2018	2.03	1.73
2019	1.99	1.71

Note: This table provides the latest available data. 2019 data was not available at time of publication.
Source: National Center for Health Statistics

Table 1.9: Components of Population Change Annual Rates: July 1, 2019 to July 1, 2020

Rank	Total Population		Births		Deaths		Naural Increase		Net Migration	
	State	Rate	State	Rate	State	Rate	State	Rate	State	Rate
	United States	4.7	United States	11.6	United States	8.7	United States	2.9	United States	1.8
1	Idaho	20.7	Utah	15.3	West Virginia	12.5	Utah	9.8	Idaho	15.6
2	Nevada	17.3	North Dakota	13.9	Alabama	11.0	Alaska	7.1	Nevada	13.8
3	Arizona	16.7	Alaska	13.7	Maine	10.7	Texas	6.1	Arizona	13.7
4	Utah	16.5	South Dakota	13.5	Mississippi	10.6	North Dakota	5.6	South Carolina	11.5
5	Texas	12.7	District of Columbia	13.5	Pennsylvania	10.4	District of Columbia	5.4	Florida	10.4
6	South Carolina	12.6	Texas	13.1	Arkansas	10.4	South Dakota	5.2	Washington	8.1
7	Washington	12.0	Nebraska	13.1	Kentucky	10.3	Nebraska	5.1	North Carolina	7.8
8	Colorado	11.8	Louisiana	12.6	Oklahoma	10.2	Idaho	5.0	Colorado	7.3
9	Florida	10.9	Idaho	12.6	Ohio	10.1	California	4.6	Delaware	7.3
10	North Carolina	10.2	Oklahoma	12.3	Tennessee	10.0	Colorado	4.4	Oregon	6.9
11	Georgia	10.1	Kansas	12.2	Louisiana	10.0	Minnesota	4.3	Tennessee	6.7
12	Delaware	8.5	Arkansas	12.2	South Carolina	9.9	Georgia	3.9	Utah	6.7
13	Oregon	8.5	Georgia	12.1	Florida	9.9	Washington	3.9	Texas	6.6
14	Tennessee	8.5	Mississippi	12.1	Missouri	9.8	Kansas	3.5	Georgia	6.1
15	Montana	7.6	Minnesota	12.0	Delaware	9.8	Nevada	3.4	Montana	6.0
16	South Dakota	6.8	Indiana	12.0	Michigan	9.6	Virginia	3.4	Maine	5.6
17	District of Columbia	6.0	Kentucky	12.0	Montana	9.3	Maryland	3.1	New Hampshire	4.7
18	Minnesota	5.9	Iowa	12.0	Indiana	9.3	New York	3.0	Indiana	2.7
19	Indiana	5.5	Hawaii	11.9	Rhode Island	9.3	Arizona	3.0	Alabama	2.5
20	North Dakota	5.2	Tennessee	11.8	Iowa	9.1	Hawaii	2.9	Oklahoma	2.1
21	New Hampshire	4.6	Nevada	11.8	North Carolina	9.0	Wyoming	2.8	Minnesota	1.6
22	Nebraska	4.6	California	11.7	Vermont	9.0	Iowa	2.8	South Dakota	1.6
23	Oklahoma	4.2	Alabama	11.7	Hawaii	9.0	Indiana	2.8	Arkansas	0.9
24	Virginia	4.0	Missouri	11.6	New Hampshire	8.9	Illinois	2.7	Missouri	0.8
25	Maine	3.8	Washington	11.6	New Mexico	8.8	New Jersey	2.7	Virginia	0.7
26	Alabama	3.2	Maryland	11.6	Connecticut	8.7	Louisiana	2.6	District of Columbia	0.6
27	Arkansas	2.7	Virginia	11.6	Oregon	8.7	North Carolina	2.4	Rhode Island	0.4
28	Wisconsin	2.6	Ohio	11.5	Wisconsin	8.7	Wisconsin	2.3	Wisconsin	0.3
29	Missouri	2.6	New York	11.4	Illinois	8.7	New Mexico	2.3	Pennsylvania	-0.0
30	Iowa	2.0	North Carolina	11.4	Kansas	8.7	Oklahoma	2.2	Kentucky	-0.2
31	Wyoming	2.0	Wyoming	11.4	Wyoming	8.6	Missouri	1.8	Massachusetts	-0.3
32	New Mexico	2.0	Illinois	11.4	New Jersey	8.5	Tennessee	1.8	New Mexico	-0.3
33	Maryland	1.6	Arizona	11.4	Maryland	8.5	Arkansas	1.8	Ohio	-0.3
34	Kentucky	1.5	Colorado	11.3	Massachusetts	8.5	Massachusetts	1.7	North Dakota	-0.4
35	Massachusetts	1.4	New Jersey	11.2	New York	8.5	Kentucky	1.7	Vermont	-0.5
36	California	1.3	New Mexico	11.0	Nevada	8.4	Montana	1.6	Nebraska	-0.5
37	Ohio	1.1	Delaware	11.0	Arizona	8.4	Oregon	1.6	Iowa	-0.7
38	Rhode Island	1.0	South Carolina	11.0	South Dakota	8.3	Mississippi	1.5	Wyoming	-0.8
39	Kansas	0.7	Michigan	11.0	North Dakota	8.2	Ohio	1.4	Michigan	-1.1
40	Michigan	0.3	Wisconsin	11.0	Virginia	8.2	Michigan	1.4	Maryland	-1.4
41	Pennsylvania	0.1	Montana	10.9	Georgia	8.2	Delaware	1.3	Connecticut	-2.7
42	New Jersey	-0.4	Pennsylvania	10.6	Nebraska	8.1	South Carolina	1.1	Kansas	-2.8
43	Vermont	-0.6	Florida	10.4	District of Columbia	8.1	Connecticut	1.0	New Jersey	-3.1
44	Mississippi	-1.6	Oregon	10.3	Washington	7.7	Alabama	0.7	Mississippi	-3.1
45	Connecticut	-1.7	Massachusetts	10.2	Minnesota	7.7	Rhode Island	0.6	California	-3.3
46	Louisiana	-2.3	West Virginia	9.9	Idaho	7.5	Florida	0.5	West Virginia	-4.1
47	Hawaii	-3.3	Rhode Island	9.9	California	7.2	Pennsylvania	0.1	Louisiana	-4.9
48	New York	-3.9	Connecticut	9.7	Texas	7.0	Vermont	-0.1	Hawaii	-6.2
49	Illinois	-4.0	Maine	9.0	Colorado	6.8	New Hampshire	-0.1	Illinois	-6.8
50	Alaska	-4.9	Vermont	8.9	Alaska	6.6	Maine	-1.7	New York	-6.9
51	West Virginia	-6.8	New Hampshire	8.8	Utah	5.5	West Virginia	-2.6	Alaska	-12.0

Note : This table has not been updated, as new components of changed were not released for 2020. July 1, 2019 is the most recent data available. Rank is high to low. When states share the same rank, the next lower rank is omitted. Total population change includes a residual. This residual represents the change in population that cannot be attributed to any specific demographic component. Data in this table may differ from other tables due to different sources of data.
Dash (-) represents zero or rounds to zero.
Source: U.S. Census Bureau, Population Division, Vintage 2019 Estimates

Table 1.10: Housing Units, Households, and Persons Per Household by State

	2010				2019				2010 to 2019 Percent Change	
	Total Housing Units	Total Households	Persons Per HH	Rank of HH size	Total Housing Units	Total Households	Persons Per HH	Rank of HH size	Total Housing Units	Total HH
United States	131,704,730	116,716,292	2.58	-	139,686,209	122,802,852	2.61	-	6.1%	5.2%
Alabama	2,171,853	1,883,791	2.48	27	2,284,922	1,897,576	2.52	25	5.2%	0.7%
Alaska	306,967	258,058	2.65	7	319,867	252,199	2.79	47	4.2%	-2.3%
Arizona	2,844,526	2,380,990	2.63	9	3,076,048	2,670,441	2.67	44	8.1%	12.2%
Arkansas	1,316,299	1,147,084	2.47	33	1,389,159	1,163,647	2.52	25	5.5%	1.4%
California	13,680,081	12,577,498	2.90	2	14,367,012	13,157,873	2.94	49	5.0%	4.6%
Colorado	2,212,898	1,972,868	2.49	22	2,464,109	2,235,103	2.52	25	11.4%	13.3%
Connecticut	1,487,891	1,371,087	2.52	19	1,524,959	1,377,166	2.51	22	2.5%	0.4%
Delaware	405,885	342,297	2.55	15	443,764	376,239	2.52	25	9.3%	9.9%
District of Columbia	296,719	266,707	2.11	51	322,814	291,570	2.29	4	8.8%	9.3%
Florida	8,989,580	7,420,802	2.48	27	9,674,053	7,905,832	2.66	42	7.6%	6.5%
Georgia	4,088,801	3,585,584	2.63	9	4,378,350	3,852,714	2.69	46	7.1%	7.5%
Hawaii	519,508	455,338	2.89	3	550,328	465,299	2.95	50	5.9%	2.2%
Idaho	667,796	579,408	2.66	6	751,113	655,859	2.68	45	12.5%	13.2%
Illinois	5,296,715	4,836,972	2.59	12	5,388,210	4,866,006	2.54	31	1.7%	0.6%
Indiana	2,795,541	2,502,154	2.52	19	2,921,115	2,597,765	2.52	25	4.5%	3.8%
Iowa	1,336,417	1,221,576	2.41	45	1,418,600	1,287,221	2.38	5	6.1%	5.4%
Kansas	1,233,215	1,112,096	2.49	22	1,288,430	1,138,329	2.49	19	4.5%	2.4%
Kentucky	1,927,164	1,719,965	2.45	37	2,006,335	1,748,732	2.48	17	4.1%	1.7%
Louisiana	1,964,981	1,728,360	2.55	15	2,089,824	1,741,076	2.60	37	6.4%	0.7%
Maine	721,830	557,219	2.32	49	750,964	573,618	2.28	1	4.0%	2.9%
Maryland	2,378,814	2,156,411	2.61	11	2,470,307	2,226,767	2.65	40	3.8%	3.3%
Massachusetts	2,808,254	2,547,075	2.48	27	2,928,818	2,650,680	2.51	22	4.3%	4.1%
Michigan	4,532,233	3,872,508	2.49	22	4,629,605	3,969,880	2.46	16	2.1%	2.5%
Minnesota	2,347,201	2,087,227	2.48	27	2,477,515	2,222,568	2.48	17	5.6%	6.5%
Mississippi	1,274,719	1,115,768	2.58	13	1,339,047	1,100,229	2.62	39	5.0%	-1.4%
Missouri	2,712,729	2,375,611	2.45	37	2,819,334	2,458,337	2.43	13	3.9%	3.5%
Montana	482,825	409,607	2.35	47	519,938	437,651	2.38	5	7.7%	6.8%
Nebraska	796,793	721,130	2.46	35	851,167	771,444	2.44	14	6.8%	7.0%
Nevada	1,173,814	1,006,250	2.65	7	1,285,681	1,143,557	2.66	42	9.5%	13.6%
New Hampshire	614,754	518,973	2.46	35	642,298	541,396	2.44	14	4.5%	4.3%
New Jersey	3,553,562	3,214,360	2.68	5	3,641,854	3,286,264	2.65	40	2.5%	2.2%
New Mexico	901,388	791,395	2.55	15	948,470	793,420	2.59	36	5.2%	0.3%
New York	8,108,103	7,317,755	2.57	14	8,404,205	7,446,812	2.54	31	3.7%	1.8%
North Carolina	4,327,528	3,745,155	2.48	27	4,748,148	4,046,348	2.52	25	9.7%	8.0%
North Dakota	317,498	281,192	2.30	50	379,974	323,519	2.28	1	19.7%	15.1%
Ohio	5,127,508	4,603,435	2.44	40	5,232,943	4,730,340	2.40	8	2.1%	2.8%
Oklahoma	1,664,378	1,460,450	2.49	22	1,749,520	1,495,151	2.57	35	5.1%	2.4%
Oregon	1,675,562	1,518,938	2.47	33	1,808,482	1,649,352	2.50	20	7.9%	8.6%
Pennsylvania	5,567,315	5,018,904	2.45	37	5,732,580	5,119,249	2.42	11	3.0%	2.0%
Rhode Island	463,388	413,600	2.44	40	470,177	407,174	2.50	20	1.5%	-1.6%
South Carolina	2,137,683	1,801,181	2.49	22	2,351,364	1,975,915	2.54	31	10.0%	9.7%
South Dakota	363,438	322,282	2.42	43	401,749	353,799	2.40	8	10.5%	9.8%
Tennessee	2,812,133	2,493,552	2.48	27	3,028,437	2,654,737	2.51	22	7.7%	6.5%
Texas	9,977,436	8,922,933	2.75	4	11,283,892	9,985,126	2.84	48	13.1%	11.9%
Utah	979,709	877,692	3.10	1	1,133,543	1,023,855	3.08	51	15.7%	16.7%
Vermont	322,539	256,442	2.34	48	339,412	262,767	2.28	1	5.2%	2.5%
Virginia	3,364,939	3,056,058	2.54	18	3,562,258	3,191,847	2.60	37	5.9%	4.4%
Washington	2,885,677	2,620,076	2.51	21	3,195,098	2,932,477	2.55	34	10.7%	11.9%
West Virginia	881,917	763,831	2.36	46	894,983	728,175	2.40	8	1.5%	-4.7%
Wisconsin	2,624,358	2,279,768	2.43	42	2,725,153	2,386,623	2.38	5	3.8%	4.7%
Wyoming	261,868	226,879	2.42	43	280,281	233,128	2.42	11	7.0%	2.8%

Note: Numbers may not sum due to rounding.
Source: U.S. Census Bureau, 2010 Census, 2019 American Community Survey 1-Year Estimates.

Table 1.11: County Population by Race and Ethnicity in Utah: July 1, 2019

Geographic Area	Total Population	Race Alone (Not Hispanic or Latino)					Two or More Races (Not Hispanic or Latino)	Hispanic or Latino Origin (of any race)	Total Minority
		White	Black/ African American	American Indian and Alaska Native	Asian	Native Hawaiian and Other Pacific Islander			
State	3,205,958	2,493,759	712,199	462,051	38,056	30,401	81,646	31,393	68,652
Share of Total Population	100.0%	77.8%	1.2%	0.9%	2.5%	1.0%	2.1%	14.4%	22.2%
Beaver	6,710	83.8%	0.2%	0.9%	0.8%	0.3%	1.6%	12.4%	16.2%
Box Elder	56,046	86.7%	0.4%	0.7%	0.7%	0.2%	1.6%	9.7%	13.3%
Cache	128,289	83.5%	0.8%	0.5%	2.2%	0.4%	1.6%	10.9%	16.5%
Carbon	20,463	82.9%	0.5%	0.9%	0.6%	0.2%	1.5%	13.4%	17.1%
Daggett	950	92.2%	0.2%	0.7%	0.3%	0.1%	2.0%	4.4%	7.8%
Davis	355,481	83.2%	1.2%	0.4%	2.0%	0.7%	2.3%	10.2%	16.8%
Duchesne	19,938	84.6%	0.4%	3.7%	0.4%	0.3%	2.3%	8.3%	15.4%
Emery	10,012	90.6%	0.3%	0.8%	0.5%	0.1%	1.2%	6.5%	9.4%
Garfield	5,051	88.2%	0.4%	2.2%	1.0%	0.3%	1.4%	6.5%	11.8%
Grand	9,754	81.9%	0.7%	3.8%	1.5%	0.1%	1.5%	10.6%	18.1%
Iron	54,839	85.8%	0.6%	1.8%	0.8%	0.3%	1.7%	8.9%	14.2%
Juab	12,017	91.1%	0.3%	0.9%	0.4%	0.2%	1.3%	5.8%	8.9%
Kane	7,886	90.6%	0.6%	1.6%	0.9%	0.2%	1.5%	4.7%	9.4%
Millard	13,188	82.8%	0.3%	1.0%	1.4%	0.1%	1.4%	12.9%	17.2%
Morgan	12,124	94.4%	0.4%	0.3%	0.5%	0.2%	0.9%	3.2%	5.6%
Piute	1,479	89.5%	0.2%	0.5%	0.4%	0.2%	1.1%	8.0%	10.5%
Rich	2,483	91.2%	0.3%	0.5%	0.1%	0.1%	0.9%	6.8%	8.8%
Salt Lake	1,160,437	70.3%	1.8%	0.7%	4.4%	1.6%	2.3%	18.8%	29.7%
San Juan	15,308	44.3%	0.4%	47.0%	0.6%	0.1%	1.9%	5.8%	55.7%
Sanpete	30,939	86.0%	0.9%	1.0%	0.7%	0.5%	1.4%	9.5%	14.0%
Sevier	21,620	91.3%	0.5%	1.0%	0.3%	0.2%	1.1%	5.5%	8.7%
Summit	42,145	84.0%	1.0%	0.3%	1.7%	0.1%	1.5%	11.5%	16.0%
Tooele	72,259	82.5%	0.7%	0.8%	0.7%	0.6%	1.8%	12.9%	17.5%
Uintah	35,734	81.5%	0.5%	6.9%	0.5%	0.2%	2.0%	8.4%	18.5%
Utah	636,235	81.7%	0.6%	0.5%	1.8%	0.9%	2.4%	12.2%	18.3%
Wasatch	34,091	83.2%	0.5%	0.3%	0.9%	0.2%	1.3%	13.7%	16.8%
Washington	177,556	83.8%	0.7%	1.0%	0.9%	0.8%	1.8%	10.9%	16.2%
Wayne	2,711	89.9%	0.4%	0.6%	0.7%	0.2%	1.1%	7.0%	10.1%
Weber	260,213	75.6%	1.4%	0.5%	1.5%	0.3%	2.1%	18.7%	24.4%

Note: As a result of the revised standards for collecting data on race and ethnicity issued by the Office of Management and Also, respondents were allowed to select more than one race. Respondents who selected more than one race are included in the "Two or More Races" category. For postcensal population estimates, the "Some Other Race" category was omitted.
Budget in 1997, the federal government treats Hispanic origin and race as separate and distinct concepts.
Therefore people identifying as Hispanic or Latino may be of any race.
Source: U.S. Census Bureau, Population Division, Vintage 2018 Estimates

Table 1.12: Total Population By City

	2010 Census (April 1)	Population Estimate (July 1)										Change from 2010 Census to 2019		Change from 2018 to 2019	
		2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Percent	Number	Percent	Number
Utah	2,763,885	2,775,332	2,814,384	2,853,375	2,897,640	2,936,879	2,981,835	3,041,868	3,101,042	3,153,550	3,205,958	10.4%	337,157	1.7%	52,408
Beaver County	6,629	6,655	6,559	6,500	6,457	6,432	6,353	6,478	6,421	6,625	6,710	1.2%	81	1.3%	85
Beaver	3,112	3,136	3,092	3,068	3,048	3,040	3,002	3,047	3,006	3,125	3,185	2.3%	73	1.9%	60
Milford	1,409	1,412	1,388	1,374	1,361	1,352	1,337	1,368	1,358	1,389	1,394	-1.1%	-15	0.4%	5
Minersville	907	911	898	890	885	882	869	892	889	911	920	1.4%	13	1.0%	9
Balance of Beaver County	1,201	1,196	1,181	1,168	1,163	1,158	1,145	1,171	1,168	1,200	1,211	0.8%	10	0.9%	11
Box Elder County	49,975	50,175	50,239	50,201	50,727	51,300	51,826	52,975	53,977	54,906	56,046	12.1%	6,071	2.1%	1,140
Bear River City	853	856	851	840	844	846	853	874	882	886	898	5.3%	45	1.4%	12
Brigham City	17,899	17,965	18,043	18,163	18,421	18,548	18,647	18,900	19,162	19,401	19,601	9.5%	1,702	1.0%	200
Corinne	685	690	681	691	687	691	698	708	726	739	763	11.4%	78	3.2%	24
Deweyville	332	336	332	328	327	328	329	334	340	355	373	12.3%	41	5.1%	18
Elwood	1,034	1,077	1,073	1,069	1,070	1,072	1,074	1,085	1,095	1,097	1,103	6.7%	69	0.5%	6
Fielding	455	463	457	451	450	451	455	462	469	476	482	5.9%	27	1.3%	6
Garland	2,400	2,443	2,423	2,395	2,406	2,420	2,436	2,486	2,521	2,544	2,590	7.9%	190	1.8%	46
Honeyville	1,441	1,446	1,433	1,424	1,422	1,433	1,445	1,494	1,542	1,579	1,644	14.1%	203	4.1%	65
Howell	245	245	245	244	243	244	244	247	249	250	254	3.7%	9	1.6%	4
Mantua	687	690	681	675	679	688	722	779	821	878	963	40.2%	276	9.7%	85
Perry	4,512	4,528	4,500	4,475	4,508	4,584	4,658	4,809	4,966	5,095	5,248	16.3%	736	3.0%	153
Plymouth	414	405	402	400	399	400	407	426	436	446	460	11.1%	46	3.1%	14
Portage	245	245	249	246	246	249	252	254	261	264	273	11.4%	28	3.4%	9
Snowville	167	167	170	168	168	168	168	170	172	172	173	3.6%	6	0.6%	1
Tremonton	7,647	7,725	7,846	7,823	7,938	8,084	8,180	8,394	8,603	8,866	9,206	20.4%	1,559	3.8%	340
Willard	1,772	1,779	1,764	1,752	1,760	1,777	1,786	1,816	1,857	1,913	1,958	10.5%	186	2.4%	45
Balance of Box Elder County	9,187	9,115	9,089	9,057	9,159	9,317	9,472	9,737	9,875	9,945	10,057	9.5%	870	1.1%	112
Cache County	112,656	113,386	114,781	115,895	117,025	117,894	119,697	122,201	124,236	126,400	128,289	13.9%	15,633	1.5%	1,889
Amalga	488	495	496	501	500	503	510	515	528	539	558	14.3%	70	3.5%	19
Clarkston	666	680	686	689	682	684	696	714	727	729	740	11.1%	74	1.5%	11
Cornish	288	298	300	302	303	304	308	311	320	327	337	17.0%	49	3.1%	10
Hyde Park	3,833	3,882	3,974	4,070	4,157	4,267	4,341	4,484	4,575	4,676	4,797	25.2%	964	2.6%	121
Hyrum	7,609	7,667	7,728	7,780	7,772	7,832	7,905	7,995	8,198	8,366	8,619	13.3%	1,010	3.0%	253

Table 1.12 (Continued): Total Population By City

	2010 Census (April 1)	Population Estimate (July 1)										Change from 2010 Census to 2019		Change from 2018 to 2019	
		2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Percent	Number	Percent	Number
Lewiston	1,766	1,779	1,776	1,779	1,763	1,756	1,762	1,801	1,806	1,801	1,798	1.8%	32	-0.2%	-3
Logan	48,174	48,448	49,041	49,094	49,057	49,048	49,769	50,621	51,019	51,334	51,542	7.0%	3,368	0.4%	208
Mendon	1,282	1,346	1,340	1,335	1,329	1,329	1,344	1,381	1,399	1,403	1,396	8.9%	114	-0.5%	-7
Millville	1,829	1,918	1,931	1,945	1,940	1,954	1,973	1,996	2,045	2,088	2,150	17.6%	321	3.0%	62
Newton	789	797	797	797	793	791	792	810	815	817	817	3.5%	28	0.0%	0
Nibley	5,438	5,564	5,747	5,858	5,974	6,163	6,392	6,679	6,893	7,038	7,135	31.2%	1,697	1.4%	97
North Logan	8,269	8,347	8,401	8,798	9,676	9,871	10,108	10,497	10,634	11,122	11,237	35.9%	2,968	1.0%	115
Paradise	904	911	917	924	924	929	939	949	973	992	1,022	13.1%	118	3.0%	30
Providence	7,075	6,994	6,999	7,009	6,998	7,049	7,140	7,215	7,401	7,553	7,780	10.0%	705	3.0%	227
Richmond	2,470	2,494	2,512	2,531	2,527	2,547	2,570	2,599	2,668	2,722	2,803	13.5%	333	3.0%	81
River Heights	1,734	1,854	1,867	1,881	1,877	1,890	1,909	1,928	1,976	2,018	2,076	19.7%	342	2.9%	58
Smithfield	9,495	9,695	9,973	10,239	10,403	10,553	10,714	11,068	11,352	11,747	12,025	26.6%	2,530	2.4%	278
Trenton	464	494	497	499	499	502	509	514	527	536	552	19.0%	88	3.0%	16
Wellsville	3,432	3,514	3,542	3,566	3,560	3,586	3,620	3,657	3,750	3,828	3,941	14.8%	509	3.0%	113
Balance of Cache County	6,651	6,209	6,257	6,298	6,291	6,336	6,396	6,467	6,630	6,764	6,964	4.7%	313	3.0%	200
Carbon County	21,403	21,403	21,305	21,222	20,903	20,636	20,391	20,324	20,131	20,233	20,463	-4.4%	-940	1.1%	230
East Carbon-Sunnyside	A	1,679	1,673	1,668	1,648	1,616	1,583	1,571	1,558	1,569	1,584	N/A	N/A	1.0%	15
Helper	2,201	2,204	2,197	2,191	2,163	2,132	2,096	2,089	2,071	2,087	2,105	-4.4%	-96	0.9%	18
Price	8,715	8,716	8,656	8,609	8,446	8,361	8,322	8,308	8,208	8,223	8,332	-4.4%	-383	1.3%	109
Scofield	24	24	24	24	23	23	22	22	22	22	23	-4.2%		4.5%	1
Wellington	1,676	1,690	1,686	1,679	1,661	1,637	1,611	1,603	1,593	1,603	1,620	-3.3%	-56	1.1%	17
Balance of Carbon County	7,109	7,090	7,069	7,051	6,962	6,867	6,757	6,731	6,679	6,729	6,799	-4.4%	-310	1.0%	70
															0
Daggett County	1,059	1,077	1,162	1,095	1,140	1,124	1,107	1,076	1,013	974	950	-10.3%	-109	-2.5%	-24
Dutch John	A	148	161	151	157	154	152	146	147	144	141	N/A	N/A	-2.1%	-3
Manila	310	330	354	331	346	336	333	322	326	313	307	-1.0%	-3	-1.9%	-6
Balance of Daggett County	749	599	647	613	637	634	622	608	540	517	502	-33.0%	-247	-2.9%	-15
Davis County	306,479	307,910	311,852	315,926	322,228	328,714	334,597	341,000	346,658	351,101	355,481	16.0%	49,002	1.2%	4,380
Bountiful	42,552	42,672	42,840	42,898	42,920	43,279	43,583	43,908	43,998	44,025	43,981	3.4%	1,429	-0.1%	-44

Table 1.12 (Continued): Total Population By City

	2010 Census (April 1)	Population Estimate (July 1)										Change from 2010 Census to 2019		Change from 2018 to 2019	
		2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Percent	Number	Percent	Number
Centerville	15,335	15,360	15,550	16,169	16,552	16,748	16,820	17,233	17,610	17,673	17,587	14.7%	2,252	-0.5%	-86
Clearfield	30,112	30,041	30,241	30,259	30,299	30,291	30,632	30,838	31,285	31,923	32,118	6.7%	2,006	0.6%	195
Clinton	20,426	20,568	20,723	20,828	20,888	21,067	21,258	21,529	21,912	22,279	22,499	10.1%	2,073	1.0%	220
Farmington	18,275	18,422	19,257	20,672	21,464	22,020	22,443	23,008	23,994	24,472	25,339	38.7%	7,064	3.5%	867
Fruit Heights	4,987	5,054	5,116	5,353	5,640	5,904	6,054	6,148	6,201	6,225	6,221	24.7%	1,234	-0.1%	-4
Kaysville	27,300	27,697	28,243	28,534	28,947	29,559	30,295	31,074	31,674	32,033	32,390	18.6%	5,090	1.1%	357
Layton	67,311	67,813	68,479	68,899	70,978	72,360	73,929	75,482	76,447	77,181	78,014	15.9%	10,703	1.1%	833
North Salt Lake	16,322	16,326	16,547	16,804	17,721	18,960	19,647	20,188	20,439	20,800	20,948	28.3%	4,626	0.7%	148
South Weber	6,051	6,145	6,269	6,429	6,562	6,767	6,976	7,208	7,331	7,503	7,836	29.5%	1,785	4.4%	333
Sunset	5,122	5,159	5,172	5,165	5,153	5,166	5,180	5,217	5,270	5,333	5,364	4.7%	242	0.6%	31
Syracuse	24,331	24,518	24,847	25,130	25,681	26,539	27,234	28,236	29,430	30,352	31,458	29.3%	7,127	3.6%	1,106
West Bountiful	5,265	5,278	5,306	5,322	5,355	5,433	5,497	5,565	5,633	5,719	5,800	10.2%	535	1.4%	81
West Point	9,511	9,461	9,646	9,705	9,796	10,065	10,284	10,485	10,573	10,733	10,957	15.2%	1,446	2.1%	224
Woods Cross	9,761	9,837	10,089	10,217	10,740	11,082	11,252	11,330	11,341	11,317	11,431	17.1%	1,670	1.0%	114
Balance of Davis County	3,818	3,559	3,527	3,542	3,532	3,474	3,513	3,551	3,520	3,533	3,538	-7.3%	-280	0.1%	5
Duchesne County	18,607	18,647	18,700	19,000	19,960	20,199	20,748	20,242	19,868	19,943	19,938	7.2%	1,331	-0.0%	-5
Altamont	225	269	270	274	287	292	298	290	282	279	277	23.1%	52	-0.7%	-2
Duchesne	1,690	1,724	1,720	1,738	1,812	1,821	1,864	1,809	1,769	1,769	1,710	1.2%	20	-3.3%	-59
Myton	569	576	576	584	605	622	640	624	619	614	606	6.5%	37	-1.3%	-8
Roosevelt	6,046	6,203	6,243	6,378	6,732	6,829	7,047	6,944	6,924	7,076	7,233	19.6%	1,187	2.2%	157
Tabiona	171	156	157	158	166	168	173	166	162	162	159	-7.0%	-12	-1.9%	-3
Balance of Duchesne County	9,906	9,719	9,734	9,868	10,358	10,467	10,726	10,409	10,112	10,043	9,953	0.5%	47	-0.9%	-90
Emery County	10,976	11,005	10,985	10,939	10,759	10,638	10,359	10,206	10,006	10,003	10,012	-8.8%	-964	0.1%	9
Castle Dale	1,630	1,643	1,640	1,630	1,600	1,585	1,542	1,518	1,488	1,489	1,491	-8.5%	-139	0.1%	2
Clawson	163	199	198	199	197	195	189	188	184	186	186	14.1%	23	0.0%	0
Cleveland	464	471	473	473	466	462	451	445	438	439	440	-5.2%	-24	0.2%	1
Elmo	418	436	438	437	439	433	421	413	404	403	402	-3.8%	-16	-0.2%	
Emery	288	290	289	290	284	283	276	271	266	267	268	-6.9%	-20	0.4%	1
Ferron	1,626	1,671	1,666	1,660	1,625	1,604	1,559	1,531	1,498	1,497	1,495	-8.1%	-131	-0.1%	-2
Green River	952	1,032	1,033	1,031	1,012	1,000	972	954	935	935	935	-1.8%	-17	0.0%	0
Huntington	2,129	2,149	2,144	2,124	2,085	2,061	2,004	1,975	1,934	1,929	1,934	-9.2%	-195	0.3%	5

Table 1.12 (Continued): Total Population By City

	2010 Census (April 1)	Population Estimate (July 1)										Change from 2010 Census to 2019		Change from 2018 to 2019	
		2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Percent	Number	Percent	Number
Orangeville	1,470	1,481	1,472	1,467	1,439	1,419	1,381	1,361	1,334	1,330	1,326	-9.8%	-144	-0.3%	-4
Balance of Emery County	1,836	1,633	1,632	1,628	1,612	1,596	1,564	1,550	1,525	1,528	1,535	-16.4%	-301	0.5%	7
Garfield County	5,172	5,197	5,149	5,063	5,029	5,005	4,962	4,952	5,025	5,002	5,051	-2.3%	-121	1.0%	49
Antimony	122	125	125	122	121	121	120	119	121	120	121	-0.8%		0.8%	1
Boulder	226	228	224	220	221	225	224	227	237	235	241	6.6%	15	2.6%	6
Bryce Canyon City	198	231	229	225	223	222	219	219	221	220	222	12.1%	24	0.9%	2
Cannonville	167	179	178	173	173	172	171	170	173	172	173	3.6%	6	0.6%	1
Escalante	797	824	817	803	796	791	785	784	795	791	798	0.1%	1	0.9%	7
Hatch	133	146	145	143	142	141	140	139	141	141	142	6.8%	9	0.7%	1
Henrieville	230	231	229	226	225	221	219	219	222	223	225	-2.2%	-5	0.9%	2
Panguitch	1,520	1,735	1,718	1,690	1,678	1,670	1,656	1,650	1,671	1,666	1,682	10.7%	162	1.0%	16
Tropic	530	532	527	519	515	512	506	505	512	509	514	-3.0%	-16	1.0%	5
Balance of Garfield County	1,249	966	957	942	935	930	922	920	932	925	933	-25.3%	-316	0.9%	8
Grand County	9,225	9,312	9,298	9,358	9,376	9,481	9,551	9,622	9,589	9,686	9,754	5.7%	529	0.7%	68
Castle Valley	319	326	325	331	333	338	341	347	347	349	350	9.7%	31	0.3%	1
Moab	5,046	5,111	5,097	5,186	5,184	5,225	5,251	5,261	5,219	5,288	5,336	5.7%	290	0.9%	48
Balance of Grand County	3,860	3,875	3,876	3,841	3,859	3,918	3,959	4,014	4,023	4,049	4,068	5.4%	208	0.5%	19
Iron County	46,163	46,263	46,622	46,646	46,530	47,041	48,113	49,676	50,761	52,678	54,839	18.8%	8,676	4.1%	2,161
Brian Head	83	85	85	86	85	85	86	88	89	91	93	12.0%	10	2.2%	2
Cedar City	28,857	28,932	29,148	29,061	28,971	29,313	29,967	30,993	31,655	32,994	34,764	20.5%	5,907	5.4%	1,770
Cedar Highlands	N/A	60	60	61	60	61	62	64	65	67	68	N/A	N/A	1.5%	1
Enoch	5,803	5,891	5,988	6,033	6,030	6,096	6,244	6,531	6,731	7,024	7,180	23.7%	1,377	2.2%	156
Kanarraville	355	358	360	360	364	368	374	385	395	400	407	14.6%	52	1.8%	7
Paragonah	488	498	500	503	501	501	511	523	527	535	545	11.7%	57	1.9%	10
Parowan	2,790	2,805	2,816	2,833	2,826	2,853	2,921	2,981	3,035	3,107	3,165	13.4%	375	1.9%	58
Balance of Iron County	7,787	7,634	7,665	7,709	7,693	7,764	7,948	8,111	8,264	8,460	8,617	10.7%	830	1.9%	157
Juab County	10,246	10,264	10,313	10,295	10,261	10,410	10,551	11,016	11,293	11,629	12,017	17.3%	1,771	3.3%	388
Eureka	669	669	668	665	662	666	668	683	687	696	707	5.7%	38	1.6%	11

Table 1.12 (Continued): Total Population By City

	2010 Census (April 1)	Population Estimate (July 1)										Change from 2010 Census to 2019		Change from 2018 to 2019	
		2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Percent	Number	Percent	Number
Levan	841	846	855	851	847	859	872	901	908	931	954	13.4%	113	2.5%	23
Mona	1,547	1,538	1,544	1,540	1,539	1,564	1,586	1,654	1,690	1,744	1,807	16.8%	260	3.6%	63
Nephi	5,389	5,398	5,424	5,411	5,394	5,467	5,536	5,801	5,977	6,155	6,378	18.4%	989	3.6%	223
Rocky Ridge	733	734	736	738	734	749	763	795	811	839	858	17.1%	125	2.3%	19
Santaquin (pt.)	0	0	0	0	0	0	0	0	0	0	0	N/A	N/A	N/A	0
Balance of Juab County	1,067	1,079	1,086	1,090	1,085	1,105	1,126	1,182	1,220	1,264	1,313	23.1%	246	3.9%	49
Kane County	7,125	7,213	7,295	7,173	7,124	7,167	7,039	7,297	7,520	7,677	7,886	10.7%	761	2.7%	209
Alton	119	119	120	117	116	116	114	117	119	120	120	0.8%	1	0.0%	0
Big Water	475	480	483	474	471	474	467	480	492	499	511	7.6%	36	2.4%	12
Glendale	381	380	385	379	375	377	369	378	385	396	407	6.8%	26	2.8%	11
Kanab	4,312	4,412	4,462	4,387	4,359	4,384	4,308	4,500	4,661	4,784	4,931	14.4%	619	3.1%	147
Orderville	577	577	583	575	570	572	560	571	583	586	592	2.6%	15	1.0%	6
Balance of Kane County	1,261	1,245	1,262	1,241	1,233	1,244	1,221	1,251	1,280	1,292	1,325	5.1%	64	2.6%	33
Millard County	12,503	12,541	12,570	12,468	12,555	12,538	12,620	12,655	12,821	12,987	13,188	5.5%	685	1.5%	201
Delta	3,436	3,445	3,456	3,430	3,453	3,451	3,471	3,489	3,536	3,558	3,602	4.8%	166	1.2%	44
Fillmore	2,435	2,477	2,487	2,474	2,491	2,493	2,495	2,497	2,528	2,603	2,650	8.8%	215	1.8%	47
Hinckley	696	697	697	689	696	696	697	700	704	706	716	2.9%	20	1.4%	10
Holden	378	378	381	376	376	375	376	377	383	385	393	4.0%	15	2.1%	8
Kanosh	474	474	474	469	472	471	471	469	474	478	485	2.3%	11	1.5%	7
Leamington	226	226	226	224	225	224	227	227	231	234	239	5.8%	13	2.1%	5
Lynndyl	106	108	106	105	108	107	109	111	111	112	117	10.4%	11	4.5%	5
Meadow	310	310	310	309	311	308	313	314	318	323	328	5.8%	18	1.5%	5
Oak City	578	607	610	604	613	614	629	632	638	643	649	12.3%	71	0.9%	6
Scipio	327	327	327	326	328	327	327	326	328	329	332	1.5%	5	0.9%	3
Balance of Millard County	3,537	3,492	3,496	3,462	3,482	3,472	3,505	3,513	3,570	3,616	3,677	4.0%	140	1.7%	61
Morgan County	9,469	9,522	9,653	9,807	10,207	10,601	11,039	11,370	11,829	11,956	12,124	28.0%	2,655	1.4%	168
Morgan	3,687	3,674	3,685	3,705	3,903	3,962	4,053	4,142	4,235	4,229	4,273	15.9%	586	1.0%	44
Balance of Morgan County	5,782	5,848	5,968	6,102	6,304	6,639	6,986	7,228	7,594	7,727	7,851	35.8%	2,069	1.6%	124

Table 1.12 (Continued): Total Population By City

	2010 Census (April 1)	Population Estimate (July 1)										Change from 2010 Census to 2019		Change from 2018 to 2019	
		2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Percent	Number	Percent	Number
Piute County	1,556	1,565	1,499	1,497	1,488	1,467	1,491	1,459	1,407	1,438	1,479	-4.9%	-77	2.9%	41
Circleville	547	551	527	527	522	510	514	499	475	481	489	-10.6%	-58	1.7%	8
Junction	191	192	184	183	183	178	179	174	166	167	172	-9.9%	-19	3.0%	5
Kingston	173	174	166	167	165	163	164	158	151	151	155	-10.4%	-18	2.6%	4
Marysvale	408	400	382	380	380	382	398	399	394	416	437	7.1%	29	5.0%	21
Balance of Piute County	237	248	240	240	238	234	236	229	221	223	226	-4.6%	-11	1.3%	3
Rich County	2,264	2,254	2,294	2,257	2,263	2,273	2,300	2,313	2,395	2,456	2,483	9.7%	219	1.1%	27
Garden City	562	563	573	564	564	567	575	582	600	613	617	9.8%	55	0.7%	4
Lake	248	250	255	250	251	252	255	257	266	272	276	11.3%	28	1.5%	4
Randolph	464	466	473	466	464	465	470	470	489	502	508	9.5%	44	1.2%	6
Woodruff	180	193	197	194	196	197	198	199	205	211	212	17.8%	32	0.5%	1
Balance of Rich County	810	782	796	783	788	792	802	805	835	858	870	7.4%	60	1.4%	12
Salt Lake County	1,029,655	1,032,976	1,047,610	1,063,956	1,079,392	1,090,005	1,102,273	1,120,109	1,136,719	1,148,692	1,160,437	12.7%	130,782	1.0%	11,745
Alta	383	386	389	391	393	389	388	388	385	383	379	-1.0%	-4	-1.0%	-4
Bluffdale (pt.)	7,598	7,619	7,766	7,965	8,364	9,827	10,810	11,708	13,464	14,628	16,358	115.3%	8,760	11.8%	1,730
Copperton	A	822	831	837	843	842	843	845	842	838	835	N/A	N/A	-0.4%	-3
Cottonwood Heights	33,433	33,593	33,864	34,122	34,311	34,195	34,145	34,182	34,009	33,986	33,843	1.2%	410	-0.4%	-143
Draper (pt.)	40,532	40,594	41,530	42,292	43,271	44,135	44,614	44,892	45,501	45,939	46,367	14.4%	5,835	0.9%	428
Emigration Canyon	A	1,571	1,587	1,598	1,609	1,607	1,607	1,612	1,608	1,602	1,592	N/A	N/A	-0.6%	-10
Herriman	21,785	22,520	23,364	24,378	26,278	28,461	30,572	35,049	39,166	44,663	51,348	135.7%	29,563	15.0%	6,685
Holladay	26,472	30,138	30,390	30,636	30,830	30,763	30,737	30,799	30,729	30,588	30,325	14.6%	3,853	-0.9%	-263
Kearns	A	35,832	36,172	36,453	36,702	36,660	36,642	36,773	36,643	36,527	36,330	N/A	N/A	-0.5%	-197
Magna	A	26,560	26,813	27,025	27,213	27,182	27,172	27,272	27,180	27,096	26,949	N/A	N/A	-0.5%	-147
Midvale	27,964	28,320	28,655	30,260	30,762	31,637	32,450	32,969	33,557	33,506	34,124	22.0%	6,160	1.8%	618
Millcreek	A	58,853	59,397	59,853	60,253	60,176	60,147	60,354	60,718	61,060	61,450	N/A	N/A	0.6%	390
Murray	46,746	46,721	47,138	48,184	48,528	48,710	48,999	49,137	49,320	49,130	48,917	4.6%	2,171	-0.4%	-213
Riverton	38,753	38,962	39,560	40,399	40,859	41,306	41,601	42,625	43,365	44,257	44,440	14.7%	5,687	0.4%	183
Salt Lake City	186,440	186,643	188,265	190,183	192,121	191,837	192,163	194,680	200,932	200,435	200,567	7.6%	14,127	0.1%	132

Table 1.12 (Continued): Total Population By City

	2010 Census (April 1)	Population Estimate (July 1)										Change from 2010 Census to 2019		Change from 2018 to 2019	
		2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Percent	Number	Percent	Number
Sandy	87,461	90,227	91,076	91,929	92,599	93,341	94,537	96,444	96,406	96,737	96,380	10.2%	8,919	-0.4%	-357
South Jordan	50,418	51,301	53,309	55,842	59,142	62,446	66,034	68,545	70,929	73,837	76,598	51.9%	26,180	3.7%	2,761
South Salt Lake	23,617	23,574	23,895	24,254	24,602	24,598	24,649	24,635	24,960	25,274	25,582	8.3%	1,965	1.2%	308
Taylorsville	58,652	58,754	59,761	60,210	60,530	60,361	60,290	60,401	60,057	60,005	59,805	2.0%	1,153	-0.3%	-200
West Jordan	103,712	104,023	106,349	108,086	109,735	110,416	111,293	113,325	113,945	115,610	116,480	12.3%	12,768	0.8%	870
West Valley City	129,480	129,653	131,031	132,463	133,744	134,431	135,903	136,741	136,334	135,982	135,248	4.5%	5,768	-0.5%	-734
White City	A	5,697	5,751	5,793	5,833	5,823	5,821	5,843	5,821	5,800	5,768	N/A	N/A	-0.6%	-32
Balance of Salt Lake County	146,209	10,613	10,717	10,803	10,870	10,862	10,856	10,890	10,848	10,809	10,752	-92.6%	-135,457	-0.5%	-57
San Juan County	14,746	14,824	14,839	15,037	14,988	15,058	15,239	15,329	15,277	15,358	15,308	3.8%	562	-0.3%	-50
Blanding	3,375	3,380	3,390	3,506	3,568	3,640	3,677	3,684	3,668	3,671	3,633	7.6%	258	-1.0%	-38
Bluff	A	237	237	239	237	237	241	242	242	244	245	N/A	N/A	0.4%	1
Monticello	1,972	1,992	1,987	1,997	1,976	1,976	1,994	2,008	1,986	1,986	1,969	-0.2%	-3	-0.9%	-17
Balance of San Juan County	9,399	9,215	9,225	9,295	9,207	9,205	9,327	9,395	9,381	9,457	9,461	0.7%	62	0.0%	4
Sanpete County	27,822	27,940	28,003	27,961	28,128	28,297	28,654	29,232	29,921	30,503	30,939	11.2%	3,117	1.4%	436
Centerfield	1,367	1,378	1,367	1,361	1,360	1,370	1,386	1,413	1,439	1,472	1,495	9.4%	128	1.6%	23
Ephraim	6,135	6,150	6,352	6,439	6,634	6,645	6,808	7,006	7,121	7,264	7,308	19.1%	1,173	0.6%	44
Fairview	1,247	1,250	1,239	1,233	1,232	1,241	1,258	1,283	1,307	1,335	1,358	8.9%	111	1.7%	23
Fayette	242	242	240	241	240	240	243	249	253	260	263	8.7%	21	1.2%	3
Fountain Green	1,071	1,071	1,065	1,061	1,058	1,064	1,080	1,100	1,122	1,147	1,166	8.9%	95	1.7%	19
Gunnison	3,285	3,330	3,314	3,262	3,263	3,302	3,261	3,290	3,498	3,525	3,585	9.1%	300	1.7%	60
Manti	3,276	3,444	3,421	3,407	3,403	3,423	3,469	3,534	3,599	3,676	3,738	14.1%	462	1.7%	62
Mayfield	496	508	504	502	501	505	512	522	532	541	552	11.3%	56	2.0%	11
Moroni	1,423	1,429	1,419	1,413	1,412	1,421	1,438	1,466	1,494	1,525	1,552	9.1%	129	1.8%	27
Mount Pleasant	3,260	3,267	3,247	3,233	3,228	3,250	3,287	3,346	3,405	3,474	3,530	8.3%	270	1.6%	56
Spring City	988	993	987	983	980	988	1,000	1,020	1,040	1,063	1,080	9.3%	92	1.6%	17
Sterling	262	293	293	291	290	291	296	301	308	313	320	22.1%	58	2.2%	7
Wales	302	346	345	343	341	342	348	353	361	366	373	23.5%	71	1.9%	7
Balance of Sanpete County	4,468	4,239	4,210	4,192	4,186	4,215	4,268	4,349	4,442	4,542	4,619	3.4%	151	1.7%	77
Sevier County	20,802	20,798	20,870	20,658	20,747	20,735	20,858	21,131	21,292	21,497	21,620	3.9%	818	0.6%	123

Table 1.12 (Continued): Total Population By City

	2010 Census (April 1)	Population Estimate (July 1)										Change from 2010 Census to 2019		Change from 2018 to 2019	
		2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Percent	Number	Percent	Number
Annabella	795	781	786	779	782	781	785	794	800	804	810	1.9%	15	0.7%	6
Aurora	1,016	1,018	1,022	1,011	1,014	1,014	1,021	1,030	1,039	1,045	1,052	3.5%	36	0.7%	7
Central Valley	528	548	553	546	549	548	552	558	561	565	570	8.0%	42	0.9%	5
Elsinore	847	852	853	847	850	851	857	864	870	876	882	4.1%	35	0.7%	6
Glenwood	464	460	461	457	460	460	463	466	471	472	476	2.6%	12	0.8%	4
Joseph	344	344	346	344	344	345	345	349	352	353	358	4.1%	14	1.4%	5
Koosharem	327	322	319	310	314	328	319	332	334	332	330	0.9%	3	-0.6%	-2
Monroe	2,256	2,268	2,280	2,260	2,271	2,269	2,287	2,305	2,327	2,339	2,358	4.5%	102	0.8%	19
Redmond	730	729	731	729	734	733	737	739	742	737	747	2.3%	17	1.4%	10
Richfield	7,551	7,568	7,584	7,493	7,519	7,498	7,537	7,688	7,738	7,882	7,888	4.5%	337	0.1%	6
Salina	2,489	2,508	2,520	2,496	2,509	2,508	2,529	2,550	2,572	2,588	2,612	4.9%	123	0.9%	24
Sigurd	429	427	429	426	426	426	429	433	436	438	443	3.3%	14	1.1%	5
Balance of Sevier County	3,026	2,973	2,986	2,960	2,975	2,974	2,997	3,023	3,050	3,066	3,094	2.2%	68	0.9%	28
Summit County	36,324	36,500	37,421	37,864	38,420	39,113	39,640	40,512	41,330	41,890	42,145	16.0%	5,821	0.6%	255
Coalville	1,363	1,370	1,394	1,405	1,421	1,449	1,460	1,490	1,568	1,580	1,596	17.1%	233	1.0%	16
Francis	1,077	1,067	1,093	1,101	1,126	1,163	1,268	1,355	1,458	1,529	1,574	46.1%	497	2.9%	45
Henefer	766	790	808	826	843	873	875	886	929	956	979	27.8%	213	2.4%	23
Kamas	1,811	1,860	1,897	1,940	1,975	2,052	2,086	2,144	2,192	2,239	2,276	25.7%	465	1.7%	37
Oakley	1,470	1,511	1,539	1,556	1,583	1,622	1,638	1,669	1,702	1,716	1,740	18.4%	270	1.4%	24
Park City (pt.)	7,547	7,629	7,763	7,829	7,921	8,075	8,146	8,306	8,426	8,499	8,526	13.0%	979	0.3%	27
Balance of Summit County	22,290	22,273	22,927	23,207	23,551	23,879	24,167	24,662	25,055	25,371	25,454	14.2%	3,164	0.3%	83
Tooele County	58,218	58,502	59,190	59,792	60,633	61,442	62,639	64,612	67,486	69,989	72,259	24.1%	14,041	3.2%	2,270
Grantsville	8,893	8,974	9,122	9,408	9,623	9,840	10,004	10,455	11,018	11,599	12,064	35.7%	3,171	4.0%	465
Rush Valley	447	442	449	456	469	468	471	477	486	493	494	10.5%	47	0.2%	1
Stockton	616	634	632	632	633	643	646	655	672	682	682	10.7%	66	0.0%	0
Tooele	31,605	31,729	32,026	32,072	32,303	32,515	33,012	33,675	34,645	35,290	36,015	14.0%	4,410	2.1%	725
Vernon	243	249	254	259	265	273	282	296	318	339	356	46.5%	113	5.0%	17
Wendover	1,400	1,403	1,403	1,405	1,412	1,410	1,415	1,427	1,454	1,471	1,489	6.4%	89	1.2%	18
Balance of Tooele County	14,976	15,071	15,304	15,560	15,928	16,293	16,809	17,627	18,893	20,115	21,159	41.3%	6,183	5.2%	1,044

Table 1.12 (Continued): Total Population By City

	2010 Census (April 1)	Population Estimate (July 1)										Change from 2010 Census to 2019		Change from 2018 to 2019	
		2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Percent	Number	Percent	Number
Uintah County	32,588	32,467	33,241	34,641	35,682	36,918	37,791	36,264	35,228	35,405	35,734	9.7%	3,146	0.9%	329
Ballard	801	811	838	882	921	1,021	1,114	1,077	1,044	1,047	1,093	36.5%	292	4.4%	46
Naples	1,755	1,737	1,786	1,870	2,039	2,145	2,201	2,119	2,056	2,067	2,082	18.6%	327	0.7%	15
Vernal	9,089	9,086	9,274	9,887	10,393	10,843	11,107	10,636	10,326	10,365	10,438	14.8%	1,349	0.7%	73
Balance of Uintah County	20,943	20,833	21,343	22,002	22,329	22,909	23,369	22,432	21,802	21,926	22,121	5.6%	1,178	0.9%	195
Utah County	516,564	519,998	530,688	539,685	551,273	560,649	572,667	590,288	606,742	621,520	636,235	23.2%	119,671	2.4%	14,715
Alpine	9,555	9,811	9,939	10,042	10,186	10,285	10,361	10,495	10,547	10,497	10,498	9.9%	943	0.0%	1
American Fork	26,263	26,690	27,101	27,408	27,846	28,142	28,211	28,681	29,498	32,481	33,161	26.3%	6,898	2.1%	680
Bluffdale (pt.)		0	0	0	0	0	0	0	0	0	0	N/A	N/A	N/A	0
Cedar Fort	368	368	373	374	376	380	380	386	390	397	395	7.3%	27	-0.5%	-2
Cedar Hills	9,796	9,849	9,945	10,052	10,158	10,241	10,187	10,303	10,317	10,204	10,083	2.9%	287	-1.2%	-121
Draper (pt.)	1,742	1,830	1,869	1,908	1,955	2,000	2,121	2,162	2,199	2,194	2,220	27.4%	478	1.2%	26
Eagle Mountain	21,415	22,226	23,167	23,655	24,572	25,919	27,035	28,878	32,114	35,556	38,391	79.3%	16,976	8.0%	2,835
Elk Ridge	2,436	2,468	2,540	2,689	2,839	2,991	3,144	3,386	3,749	4,047	4,335	78.0%	1,899	7.1%	288
Fairfield	119	115	115	116	116	119	123	130	138	136	145	21.8%	26	6.6%	9
Genola	1,370	1,377	1,394	1,404	1,416	1,431	1,437	1,484	1,515	1,545	1,567	14.4%	197	1.4%	22
Goshen	921	911	917	921	931	940	931	939	942	927	915	-0.7%	-6	-1.3%	-12
Highland	15,523	15,645	16,055	16,437	16,969	17,392	17,808	18,472	18,923	19,167	19,175	23.5%	3,652	0.0%	8
Lehi	47,407	48,170	49,677	51,385	55,089	57,000	59,034	61,690	63,674	65,958	69,724	47.1%	22,317	5.7%	3,766
Lindon	10,070	10,096	10,238	10,386	10,518	10,619	10,722	10,860	10,948	10,963	11,100	10.2%	1,030	1.2%	137
Mapleton	7,979	8,128	8,331	8,521	8,791	9,061	9,204	9,493	9,793	10,197	10,731	34.5%	2,752	5.2%	534
Orem	88,328	88,722	89,605	90,578	91,318	91,362	93,777	96,902	97,674	97,430	97,828	10.8%	9,500	0.4%	398
Payson	18,294	18,631	18,950	19,153	19,333	19,485	19,494	19,768	19,847	19,789	20,303	11.0%	2,009	2.6%	514
Pleasant Grove	33,509	33,733	34,132	34,487	34,869	36,879	37,761	38,510	38,785	38,402	38,258	14.2%	4,749	-0.4%	-144
Provo	112,488	112,923	115,191	115,559	116,119	115,378	114,596	116,627	117,583	116,630	116,618	3.7%	4,130	-0.0%	-12
Salem	6,423	6,464	6,607	6,752	6,908	7,199	7,418	7,781	8,192	8,460	8,621	34.2%	2,198	1.9%	161
Santaquin (pt.)	9,128	9,274	9,561	9,912	10,071	10,318	10,569	11,062	11,638	12,271	12,865	40.9%	3,737	4.8%	594
Saratoga Springs	17,781	18,084	19,063	21,090	22,593	24,168	25,139	26,609	29,532	31,340	33,282	87.2%	15,501	6.2%	1,942
Spanish Fork	34,691	35,185	35,900	36,342	36,934	37,467	37,882	38,705	39,383	39,922	40,913	17.9%	6,222	2.5%	991
Springville	29,466	29,786	30,365	30,715	31,243	31,464	32,240	32,962	33,220	33,057	33,310	13.0%	3,844	0.8%	253
Vineyard	139	113	149	203	431	650	3,339	4,139	6,167	10,014	11,866	8436.7%	11,727	18.5%	1,852
Woodland Hills	1,344	1,369	1,394	1,415	1,436	1,455	1,468	1,510	1,546	1,566	1,590	18.3%	246	1.5%	24
Balance of Utah County	10,009	8,030	8,110	8,181	8,256	8,304	8,286	8,354	8,428	8,370	8,341	-16.7%	-1,668	-0.3%	-29

Table 1.12 (Continued): Total Population By City

	2010 Census (April 1)	Population Estimate (July 1)										Change from 2010 Census to 2019		Change from 2018 to 2019	
		2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Percent	Number	Percent	Number
Wasatch County	23,530	23,644	24,408	25,344	26,584	27,814	29,118	30,375	31,890	33,067	34,091	44.9%	10,561	3.1%	1,024
Charleston	415	427	431	439	451	456	469	472	480	479	487	17.3%	72	1.7%	8
Daniel	938	923	974	994	1,023	1,038	1,057	1,063	1,065	1,075	1,077	14.8%	139	0.2%	2
Heber	11,362	11,509	11,788	12,366	13,064	13,717	14,342	14,972	15,703	16,303	17,082	50.3%	5,720	4.8%	779
Hideout	656	658	693	715	747	778	824	864	937	972	998	52.1%	342	2.7%	26
Independence	164	142	152	154	161	168	178	187	200	200	198	20.7%	34	-1.0%	-2
Interlaken	A	157	166	172	178	187	197	207	220	230	235	N/A	N/A	2.2%	5
Midway	3,845	3,916	3,977	4,089	4,272	4,504	4,686	4,898	5,086	5,240	5,280	37.3%	1,435	0.8%	40
Park City (pt.)	11	0	0	0	0	0	0	0	0	0	0	N/A	-11		0
Wallsburg	250	259	272	282	295	307	325	339	361	377	385	54.0%	135	2.1%	8
Balance of Wasatch County	5,889	5,653	5,955	6,133	6,393	6,659	7,040	7,373	7,838	8,191	8,349	41.8%	2,460	1.9%	158
Washington County	138,115	138,389	141,249	144,139	146,987	151,081	154,650	159,352	165,929	171,567	177,556	28.6%	39,441	3.5%	5,989
Apple Valley	701	701	709	718	718	719	718	741	773	823	844	20.4%	143	2.6%	21
Enterprise	1,711	1,713	1,734	1,750	1,750	1,771	1,790	1,813	1,844	1,862	1,890	10.5%	179	1.5%	28
Hildale	2,726	2,771	2,909	2,926	2,916	2,901	2,897	2,914	2,934	2,910	2,896	6.2%	170	-0.5%	-14
Hurricane	13,748	13,795	14,017	14,311	14,571	15,006	15,485	16,163	17,150	18,184	19,074	38.7%	5,326	4.9%	890
Ivins	6,753	6,771	6,916	7,131	7,329	7,600	7,804	8,053	8,736	8,901	9,192	36.1%	2,439	3.3%	291
La Verkin	4,060	4,065	4,105	4,140	4,138	4,167	4,199	4,261	4,350	4,392	4,446	9.5%	386	1.2%	54
Leeds	820	810	814	821	821	831	836	849	863	863	873	6.5%	53	1.2%	10
New Harmony	207	212	215	216	217	219	221	226	229	231	234	13.0%	27	1.3%	3
Rockville	245	245	246	249	248	252	259	269	271	271	269	9.8%	24	-0.7%	-2
St. George	72,897	72,837	73,789	75,010	76,275	77,942	79,574	81,696	84,547	87,113	89,587	22.9%	16,690	2.8%	2,474
Santa Clara	6,003	6,144	6,268	6,375	6,451	6,602	6,757	6,974	7,430	7,865	8,417	40.2%	2,414	7.0%	552
Springdale	529	530	541	546	546	548	555	570	592	606	629	18.9%	100	3.8%	23
Toquerville	1,370	1,374	1,381	1,397	1,403	1,439	1,481	1,534	1,616	1,663	1,735	26.6%	365	4.3%	72
Virgin	596	600	603	608	608	608	610	615	635	643	658	10.4%	62	2.3%	15
Washington	18,761	18,867	19,978	20,845	21,880	23,318	24,258	25,326	26,475	27,699	29,174	55.5%	10,413	5.3%	1,475
Balance of Washington County	6,988	6,954	7,024	7,096	7,116	7,158	7,206	7,348	7,484	7,541	7,638	9.3%	650	1.3%	97

Table 1.12 (Continued): Total Population By City

	2010 Census (April 1)	Population Estimate (July 1)										Change from 2010 Census to 2019		Change from 2018 to 2019	
		2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Percent	Number	Percent	Number
Wayne County	2,778	2,772	2,742	2,705	2,712	2,695	2,690	2,671	2,702	2,671	2,711	-2.4%	-67	1.5%	40
Bicknell	327	348	344	339	340	335	334	329	331	329	336	2.8%	9	2.1%	7
Hanksville	219	218	217	215	214	213	215	215	218	215	220	0.5%	1	2.3%	5
Loa	572	616	610	600	602	594	586	580	581	574	575	0.5%	3	0.2%	1
Lyman	258	257	255	253	254	253	253	251	255	252	257	-0.4%		2.0%	5
Torrey	182	245	242	238	239	239	240	238	243	240	244	34.1%	62	1.7%	4
Balance of Wayne County	1,220	1,088	1,074	1,060	1,063	1,061	1,062	1,058	1,074	1,061	1,079	-11.6%	-141	1.7%	18
Weber County	231,236	232,133	233,847	236,251	238,062	240,152	242,872	247,131	251,576	255,697	260,213	12.5%	28,977	1.8%	4,516
Farr West	5,928	5,983	6,069	6,172	6,256	6,425	6,688	6,854	6,978	7,170	7,385	24.6%	1,457	3.0%	215
Harrisville	5,567	5,612	5,706	5,783	5,867	6,020	6,159	6,329	6,524	6,673	6,872	23.4%	1,305	3.0%	199
Hooper	7,218	7,246	7,455	7,627	7,855	8,005	8,139	8,396	8,630	8,882	9,152	26.8%	1,934	3.0%	270
Huntsville	608	618	619	622	630	630	636	640	639	639	642	5.6%	34	0.5%	3
Marriott-Slaterville	1,701	1,700	1,708	1,717	1,725	1,732	1,743	1,753	1,784	1,843	1,898	11.6%	197	3.0%	55
North Ogden	17,357	17,479	17,597	17,777	17,992	18,168	18,356	18,679	19,467	19,963	20,582	18.6%	3,225	3.1%	619
Ogden	82,825	83,100	83,312	83,874	84,180	84,406	85,295	86,742	87,061	87,202	87,773	6.0%	4,948	0.7%	571
Plain City	5,476	5,518	5,685	5,875	6,021	6,195	6,268	6,464	6,756	7,104	7,669	40.0%	2,193	8.0%	565
Pleasant View	7,979	7,999	8,127	8,309	8,583	8,914	9,278	9,751	10,242	10,668	10,839	35.8%	2,860	1.6%	171
Riverdale	8,426	8,505	8,536	8,602	8,632	8,659	8,684	8,747	8,760	8,773	8,838	4.9%	412	0.7%	65
Roy	36,884	37,555	37,783	38,070	38,216	38,353	38,422	38,704	39,184	39,262	39,613	7.4%	2,729	0.9%	351
South Ogden	16,532	16,605	16,639	16,720	16,746	16,818	16,863	17,017	17,096	17,111	17,199	4.0%	667	0.5%	88
Uintah	1,322	1,322	1,324	1,329	1,333	1,335	1,336	1,344	1,343	1,346	1,353	2.3%	31	0.5%	7
Washington Terrace	9,067	9,038	9,049	9,082	9,086	9,098	9,105	9,154	9,151	9,169	9,248	2.0%	181	0.9%	79
West Haven	10,272	10,422	10,716	11,055	11,236	11,569	11,874	12,291	13,495	15,170	16,109	56.8%	5,837	6.2%	939
Balance of Weber County	14,074	13,431	13,522	13,637	13,704	13,825	14,026	14,266	14,466	14,722	15,041	6.9%	967	2.2%	319

A - An "A" in the 2010 Census field indicates a locality that was formed or incorporated after the 2010 Census
Changes to the Vintage 2019 release include: removal of Ophir from Tooele County, addition of Bluff to San Juan County, addition of metro townships (Copperton, Emigration Canyon, Kearns, Magna, and White City) to Salt Lake County
Source: U.S. Census Bureau, Population Division, Vintage 2019 Estimates

Table 1.13: Utah Demographic Projections by Race and Ethnicity

		Race Alone (Not Hispanic or Latino)													
		White		Black/ African American		American Indian and Alaska Native		Asian		Native Hawaiian and Other Pacific Islander		Two or More Races (Not Hispanic or Latino)		Hispanic or Latino Origin (of any race)	
Year	Total	Estimate	Share	Estimate	Share	Estimate	Share	Estimate	Share	Estimate	Share	Estimate	Share	Estimate	Share
2022	3,449,985	2,660,341	77.1%	41,579	1.2%	32,753	0.9%	89,229	2.6%	34,519	1.0%	78,639	2.3%	512,926	14.9%
2023	3,507,364	2,694,104	76.8%	43,035	1.2%	33,258	0.9%	91,989	2.6%	35,371	1.0%	81,805	2.3%	527,803	15.0%
2024	3,562,226	2,725,561	76.5%	44,488	1.2%	33,738	0.9%	94,725	2.7%	36,203	1.0%	85,003	2.4%	542,508	15.2%
2025	3,615,036	2,755,075	76.2%	45,943	1.3%	34,198	0.9%	97,450	2.7%	37,020	1.0%	88,242	2.4%	557,107	15.4%
2026	3,669,342	2,785,324	75.9%	47,445	1.3%	34,671	0.9%	100,267	2.7%	37,857	1.0%	91,610	2.5%	572,169	15.6%
2027	3,723,441	2,815,007	75.6%	48,972	1.3%	35,141	0.9%	103,115	2.8%	38,694	1.0%	95,065	2.6%	587,448	15.8%
2028	3,778,152	2,844,736	75.3%	50,535	1.3%	35,614	0.9%	106,016	2.8%	39,542	1.0%	98,630	2.6%	603,079	16.0%
2029	3,833,308	2,874,374	75.0%	52,134	1.4%	36,090	0.9%	108,966	2.8%	40,399	1.1%	102,304	2.7%	619,041	16.1%
2030	3,889,310	2,904,211	74.7%	53,773	1.4%	36,572	0.9%	111,977	2.9%	41,272	1.1%	106,101	2.7%	635,405	16.3%
2031	3,946,122	2,934,210	74.4%	55,454	1.4%	37,059	0.9%	115,049	2.9%	42,157	1.1%	110,021	2.8%	652,172	16.5%
2032	4,004,069	2,964,602	74.0%	57,181	1.4%	37,554	0.9%	118,192	3.0%	43,061	1.1%	114,079	2.8%	669,399	16.7%
2033	4,062,343	2,994,778	73.7%	58,946	1.5%	38,050	0.9%	121,384	3.0%	43,974	1.1%	118,255	2.9%	686,955	16.9%
2034	4,120,490	3,024,402	73.4%	60,742	1.5%	38,543	0.9%	124,611	3.0%	44,894	1.1%	122,539	3.0%	704,761	17.1%
2035	4,178,317	3,053,334	73.1%	62,566	1.5%	39,029	0.9%	127,866	3.1%	45,817	1.1%	126,929	3.0%	722,775	17.3%
2036	4,235,865	3,081,616	72.8%	64,422	1.5%	39,511	0.9%	131,152	3.1%	46,743	1.1%	131,430	3.1%	740,991	17.5%
2037	4,293,208	3,109,308	72.4%	66,310	1.5%	39,988	0.9%	134,469	3.1%	47,676	1.1%	136,047	3.2%	759,410	17.7%
2038	4,350,268	3,136,365	72.1%	68,230	1.6%	40,459	0.9%	137,814	3.2%	48,612	1.1%	140,781	3.2%	778,006	17.9%
2039	4,407,155	3,162,882	71.8%	70,185	1.6%	40,926	0.9%	141,190	3.2%	49,553	1.1%	145,637	3.3%	796,781	18.1%
2040	4,463,950	3,188,934	71.4%	72,176	1.6%	41,390	0.9%	144,598	3.2%	50,496	1.1%	150,620	3.4%	815,736	18.3%
2041	4,520,678	3,214,551	71.1%	74,204	1.6%	41,850	0.9%	148,038	3.3%	51,445	1.1%	155,732	3.4%	834,858	18.5%
2042	4,577,247	3,239,686	70.8%	76,267	1.7%	42,305	0.9%	151,505	3.3%	52,396	1.1%	160,972	3.5%	854,116	18.7%
2043	4,633,568	3,264,294	70.4%	78,365	1.7%	42,755	0.9%	154,995	3.3%	53,349	1.2%	166,338	3.6%	873,473	18.9%
2044	4,689,532	3,288,321	70.1%	80,493	1.7%	43,197	0.9%	158,503	3.4%	54,300	1.2%	171,829	3.7%	892,889	19.0%
2045	4,745,057	3,311,731	69.8%	82,652	1.7%	43,631	0.9%	162,023	3.4%	55,250	1.2%	177,441	3.7%	912,330	19.2%
2046	4,800,120	3,334,533	69.5%	84,840	1.8%	44,057	0.9%	165,552	3.4%	56,192	1.2%	183,174	3.8%	931,771	19.4%
2047	4,854,748	3,356,761	69.1%	87,057	1.8%	44,474	0.9%	169,089	3.5%	57,131	1.2%	189,030	3.9%	951,206	19.6%
2048	4,909,089	3,378,535	68.8%	89,306	1.8%	44,884	0.9%	172,637	3.5%	58,066	1.2%	195,013	4.0%	970,648	19.8%
2049	4,963,211	3,399,922	68.5%	91,586	1.8%	45,286	0.9%	176,196	3.6%	58,994	1.2%	201,126	4.1%	990,100	19.9%
2050	5,017,232	3,421,016	68.2%	93,900	1.9%	45,683	0.9%	179,769	3.6%	59,920	1.2%	207,372	4.1%	1,009,572	20.1%
2051	5,071,236	3,441,888	67.9%	96,249	1.9%	46,074	0.9%	183,354	3.6%	60,843	1.2%	213,753	4.2%	1,029,075	20.3%
2052	5,125,126	3,462,482	67.6%	98,630	1.9%	46,459	0.9%	186,948	3.6%	61,761	1.2%	220,262	4.3%	1,048,584	20.5%
2053	5,178,833	3,482,762	67.2%	101,043	2.0%	46,836	0.9%	190,545	3.7%	62,672	1.2%	226,895	4.4%	1,068,081	20.6%
2054	5,232,327	3,502,715	66.9%	103,485	2.0%	47,206	0.9%	194,141	3.7%	63,578	1.2%	233,646	4.5%	1,087,556	20.8%
2055	5,285,767	3,522,454	66.6%	105,961	2.0%	47,570	0.9%	197,742	3.7%	64,476	1.2%	240,523	4.6%	1,107,042	20.9%
2056	5,339,307	3,542,085	66.3%	108,472	2.0%	47,928	0.9%	201,351	3.8%	65,373	1.2%	247,527	4.6%	1,126,571	21.1%
2057	5,393,004	3,561,647	66.0%	111,020	2.1%	48,283	0.9%	204,970	3.8%	66,266	1.2%	254,662	4.7%	1,146,155	21.3%
2058	5,446,925	3,581,183	65.7%	113,608	2.1%	48,633	0.9%	208,601	3.8%	67,160	1.2%	261,930	4.8%	1,165,810	21.4%
2059	5,501,088	3,600,706	65.5%	116,234	2.1%	48,980	0.9%	212,243	3.9%	68,052	1.2%	269,331	4.9%	1,185,543	21.6%
2060	5,555,423	3,620,164	65.2%	118,900	2.1%	49,321	0.9%	215,894	3.9%	68,941	1.2%	276,862	5.0%	1,205,341	21.7%
2061	5,609,943	3,655,691	65.2%	120,067	2.1%	49,805	0.9%	218,012	3.9%	69,617	1.2%	279,579	5.0%	1,217,170	21.7%
2062	5,664,555	3,691,280	65.2%	121,236	2.1%	50,290	0.9%	220,135	3.9%	70,295	1.2%	282,301	5.0%	1,229,019	21.7%
2063	5,719,145	3,726,853	65.2%	122,404	2.1%	50,775	0.9%	222,256	3.9%	70,972	1.2%	285,021	5.0%	1,240,863	21.7%
2064	5,773,599	3,762,338	65.2%	123,569	2.1%	51,258	0.9%	224,372	3.9%	71,648	1.2%	287,735	5.0%	1,252,678	21.7%
2065	5,827,810	3,797,664	65.2%	124,730	2.1%	51,740	0.9%	226,479	3.9%	72,321	1.2%	290,437	5.0%	1,264,440	21.7%

Source: Kem C. Gardner Policy Institute 2015-2065 State and County Projections

Measuring Economic Diversity

2

John C. Downen, Kem C. Gardner Policy Institute

HACHMAN OVERVIEW

The Hachman Index measures economic diversity. Using indicators such as gross domestic product (GDP) or employment, the index measures the mix of industries present in a particular region relative to a (well-diversified) reference region. Hachman Index scores are normalized from 0 to 100. A higher score indicates more economic diversity, while a lower score indicates less economic diversity. The Hachman Index is often applied at the national level, allowing for comparison between individual states. With reliable data, the index may also be applied to measure industrial distribution across counties. This chapter examines the results of a Hachman Index analysis at the state and county levels for 2019.

Utah's Midsized Economy Is the Most Diverse

Utah is a leader among U.S. states for industrial diversity. A Hachman Index analysis using 2019 GDP data reported by the Bureau of Economic Analysis and aggregated to the two-digit NAICS code, reveals that Utah's industrial distribution is very similar to that of the United States. Utah ranks first, with a score of 97.3, followed by Missouri and Georgia at 96.7 and 96.5, respectively (see Figure 1). Overall, six states (Utah, Missouri, Georgia, Arizona, Illinois, and Pennsylvania) have index scores above 95 (see Table 1). As the Hachman Index is a relative measure, it is not definitive that any one of these states is significantly more diverse than another.[1]

Utah leads the West for industrial diversity. Arizona, Colorado, and California all have larger economies than Utah, but have lower Hachman Index scores.[2] States with similar-sized economies include Oklahoma, Iowa, Nevada, and Kansas.[3] Of these, only Kansas has an index score above 90, indicating a very diverse economy. Kansas scores 90.7, Iowa 75.2, Nevada 68.0, and Oklahoma the lowest at 57.6. Despite Utah's midsized economy (31st largest), its industrial composition is more diverse than even the largest states.

Urban Counties More Diverse, Rural Counties More Specialized

Salt Lake, Weber, Davis, and Washington counties are the most economically diverse within Utah. Because adequate GDP data are not available at the county level, we used employment data. A Hachman Index analysis of Utah Department of Workforce Services and Bureau of Labor Statistics data using two-digit NAICS codes, shows the economic disparity of Utah's counties. Urban counties tend to have more diverse economies with a larger variety of employment opportunities and a wider range of industry sectors available to the population (see Figure 2). Salt Lake and Weber counties are two of the most populous counties in the state.[4] Washington County is the most populated county outside of the Wasatch Front, and adjacent Iron County is one of the fastest-growing counties in the state.[5] As more people move to these counties, the employment opportunities should increase and the industrial composition will continue to diversify.

Most of the counties bordering Salt Lake have relatively diverse economies. Davis, Utah, and Tooele all have index scores above 75, ranking in the top 10 most diverse counties (see Table 2). A notable exception is Summit County, which has high employment in arts, entertainment, and recreation and accommodations and food services, the result of a tourism-based economy centered on Park City.[6] Another exception is Morgan County, which has the state's highest concentration of employment in construction. In counties with small populations,

1 The variation among the top five state scores is 1.6 points. The Hachman Index is not an exact measure and small differences are not definitive. When comparing state scores, the exact score is less important than the rank and size of the variation in scores relative to other states.

2 When ranking state economies by size using total GDP, California is the largest in the nation, Colorado ranks 16th, and Arizona ranks 20th. Utah ranks as the 31st largest state economy.

3 When ranking state economies by size using total GDP, Oklahoma (29th) and Iowa (30th) rank just larger than Utah, and Nevada (32nd) and Kansas (33rd) rank just smaller.

4 Emily Harris, M.S., 2019, "State and County Population Estimates for Utah: 2019," Kem C. Gardner Policy Institute.

5 *Ibid*.

6 This concentration is measured by the comparison of the location quotients of each employment sector in the county. Arts, entertainment, and recreation ranks first, with a location quotient of 8.0, followed by real estate and rental and leasing (3.2), and accommodation and food services (2.4).

just a few large employers can have an outsized effect on the counties' overall employment mix.

Duchesne, Uintah, and Beaver are the least economically diverse counties. In Uintah and Duchesne, the low index scores are a result of a heavy concentration in oil and gas extraction.[7] These counties have a competitive advantage in the extractive industries due to their natural resources, which are geographically dependent and not found in every county. Beaver's highest concentration is in agriculture, due to the county's large hog farm. Like Morgan and Summit counties, all three have relatively small populations, so just a few large employers can have a significant effect on their industrial composition.

With a few exceptions, Utah's metropolitan counties have the most diverse economies in the state, followed by the adjacent ring counties. The rural counties with smaller populations and fewer industries have the least diverse economies. This highlights a clear urban-rural divide in the economic opportunities available to residents of the state. Urban counties offer a more diverse array of economic opportunities across a larger set of industries, while rural counties have fewer economic opportunities and fewer industries to choose from. While economic diversification is not a measure of economic prosperity, it is an indicator of greater economic choice and opportunity.

Calculating the Hachman index

The Hachman Index is the reciprocal sum, or mean location quotient, of the study area across all industries where the mean is generated by weighting the respective sectors' location quotients[8] by the sector shares in the region.[9] The Hachman Index for a given time period is calculated as follows:

$$HI = \frac{1}{\left(\sum_i \left(\frac{E_{Si}}{E_{Ri}} \right) x \left(E_{Si} \right) \right)}$$

E_{Si} is the share of the subject area employment in industry *i*.

E_{Ri} is the share of the reference region employment in industry *i*.

A Hachman Index score ranges from 0 to 100. A higher score indicates that the subject area's industrial distribution more closely resembles that of the reference geography, and is therefore diverse. A lower score indicates a region is less diverse than the reference area and more concentrated in fewer industries. Diversity in economic opportunities, as represented by a diverse set of industries, is generally considered a positive contributor to a region's economic stability.

The Hachman Index is not without its shortcomings. For one, the subject area is contained within the reference region, i.e. Utah is included in the U.S., and so, to some degree, the subject area is being compared to itself. Another limitation of the Hachman Index is that it does not account for the competitive advantages of a region. A region may have an advantage specializing in a specific industry, making a concentration in that industry economically justifiable over a more diversified economy.

Although diversification is usually considered a positive attribute for an economy, an increase in diversity may not be good for the labor market. As discussed in the 1995 *Economic Report to the Governor*, Utah had specialized in metal mining industries. In the mid-1980s Kennecott experienced major layoffs, which decreased its share of the overall Utah economy and therefore raised the measure of diversity in Utah. However, the effect on the labor market was negative, with lower employment levels. The transition to increased industrial diversity may not immediately result in improvements for residents of a region or imply economic growth.[10]

The Hachman Index is also affected by the measures used. The value of the Hachman Index will be affected if broader measures are used. For example, an index calculated from employment by industry will behave differently over time from one calculated from GDP, due to changes in labor productivity that lead to increased production using fewer employees.

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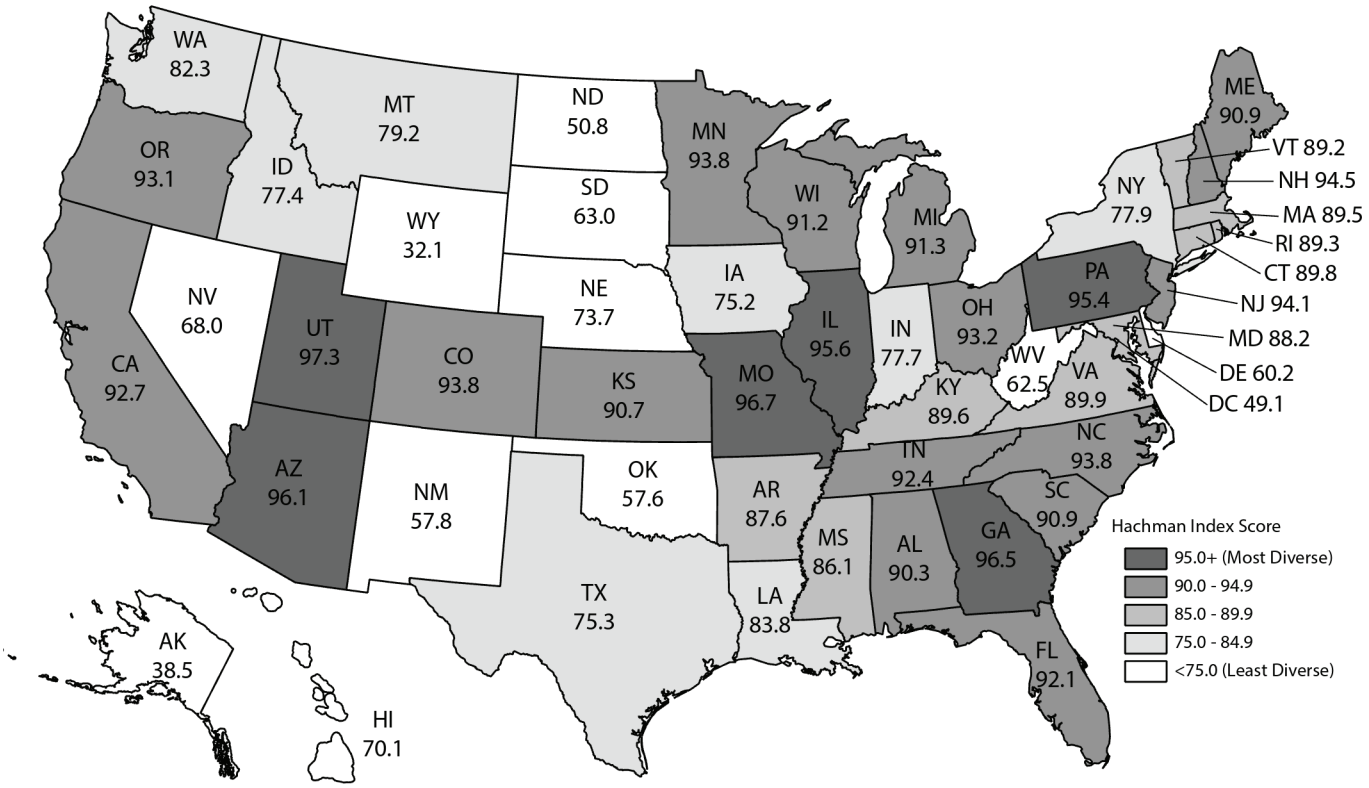
7 Duchesne has the highest mining location quotient of all counties in the state at 41.1, followed by Uintah at 31.9. The next highest are Carbon at 22.2 and Emery at 17.4, all well above other counties in the state.

8 A location quotient measures the relative concentration of an industry in one area compared with another. The Bureau of Labor Statistics defines it as a "ratio that compares the concentration of a resource or activity, such as employment, in a defined area to that of a larger area or base. For example, location quotients can be used to compare state employment by industry to that of the nation." It is calculated by dividing an industry's share of the total (employment, GDP, etc.) in the study region by its share in the reference region.

9 Frank Hachman, 2002, "The Degree of Similarity Index: A Measure of Diversification Superior to the Hachman Index," unpublished manuscript.

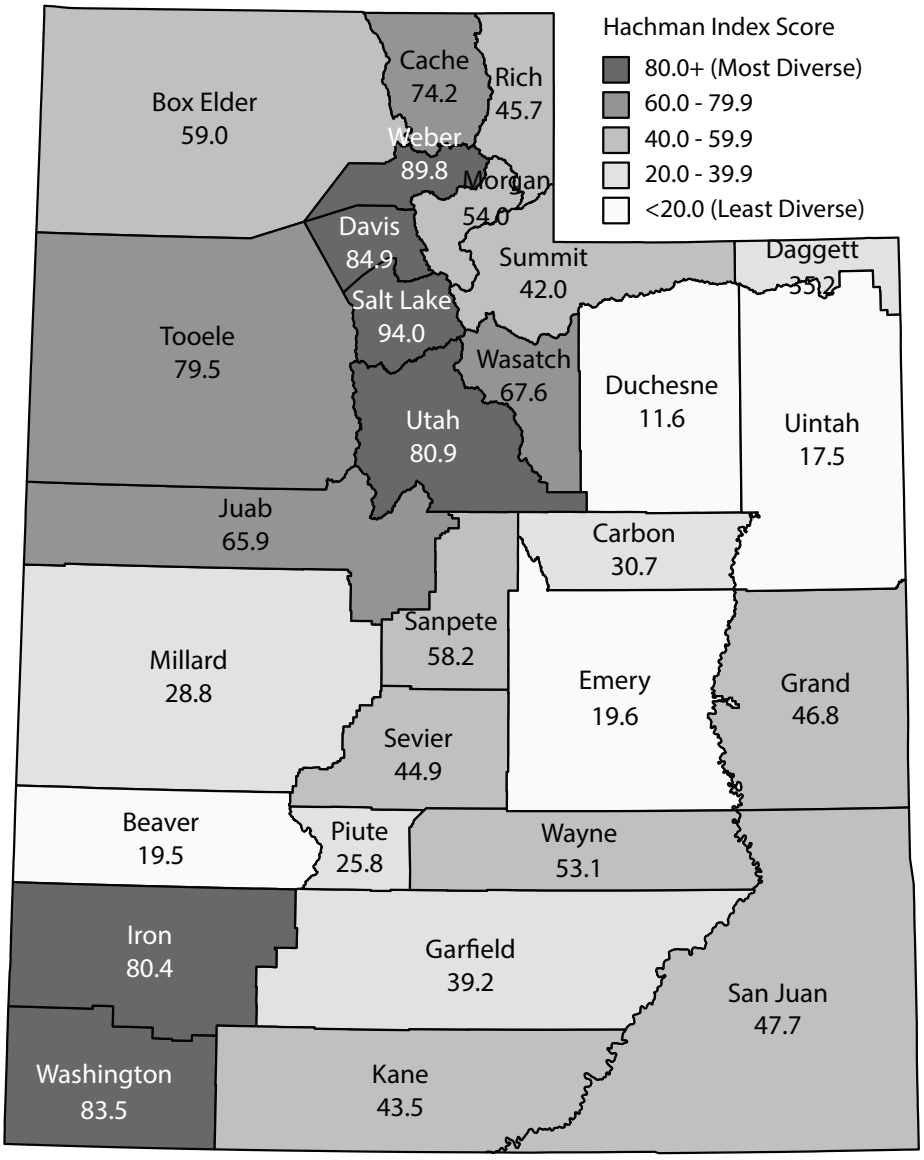
10 1995 *Economic Report to the Governor*, pages 207–214.

Figure 2.1: Hachman Index for States, 2019



Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Economic Analysis GDP data

Figure 2.2: Hachman Index for Utah Counties, 2019



Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics and Utah Department of Workforce Services employment data

Employment, Wages, and Labor Force

3

Mark Knold, Utah Department of Workforce Services

2020 OVERVIEW

Utah began 2020 with a high degree of economic momentum. Job growth was strong, all industry sectors were thriving, the labor market fully employed, and optimism abounded. Utah's vigorous economic performance was historic, and continued vitality seemed certain. Few if any envisioned what was about to unfold.

A health pandemic arose and forcefully swept the globe. As a result, business and regular commerce were significantly impacted. Uncertainty replaced optimism, and an immediate and dramatic disruption developed. In a month and a half, Utah's economy transformed from robust and expanding to restrained and contracting. This was Utah's most rapid economic reversal in its history.

COVID-19 prevalence was established in the second half of March, and by April's end historically low unemployment gave way to an historic spike. Utah's unemployment rate jumped to 10.4%--a height not seen since the Great Depression. Job losses amounted to around 140,000, and Utah's employment level contracted by 7.6%. Nearly all industry sectors were negatively impacted.

Service-based industries suffered the most. Any industry with close personal customer interaction, crowded environments, or travel dependency saw strict and lingering employment setbacks.

The broad leisure and hospitality sector contracted the most. Entertainment, recreation, dining out, and travel and accommodation were most affected by public health measures and consumer trepidation. Many tourism-based rural communities experienced disproportionate losses.

Healthcare, education, and retail trade were additional industries significantly impacted by the initial restrictions, but these made speedy recoveries after April's trough.

Construction and the financial sector were exceptions that may have benefitted from the economic response. Construction is largely outdoor work, and Utah's housing needs did not pause during the pandemic. Lowered interest rates stimulated home sales, and mortgage financing and re-financing accelerated.

Though Utah couldn't avoid the pandemic's setback, Utah's employment contraction was proportionally the nation's least. The state's strong economic position entering the pandemic paid dividends, providing Utah a cushion to absorb the economic reversals.

For the year, it is estimated that Utah's employment count will contract by around 1.4%, or roughly -22,000 jobs. Eight of 11 major industry sectors may record employment loss. The overall unemployment rate will likely settle around 4.9%, noticeably better than the nation's anticipated 2020 rate of 8.1%, but up from Utah's pre-pandemic full-employment of 2.5%.

The pandemic's economic impact is not as encompassing as was the Great Recession's ten years ago. It is anticipated that Utah's employment losses will be stabilized by the end of 2020, or eight months after the April slide. In contrast, it took Utah 23 months to recover from the Great Recession's employment low point.

The important underlying perspective is this was an external economic setback, not an internal market imbalance requiring restructuring; an adjustment that generally takes longer to transpire. Utah's fundamentals only need to overcome the pandemic's setbacks, not fundamentally rebuild. The economy will improve as promptly and aggressively as the market will allow. This is Utah's position entering 2021.

2021 OUTLOOK

As the new vaccine is distributed to more people, Utah's 2021 economy should be free to work towards its regular aggressive functionality. However, employment measures throughout much of the year will be compared against the deep trough of 2020 and are therefore unnaturally overstated.

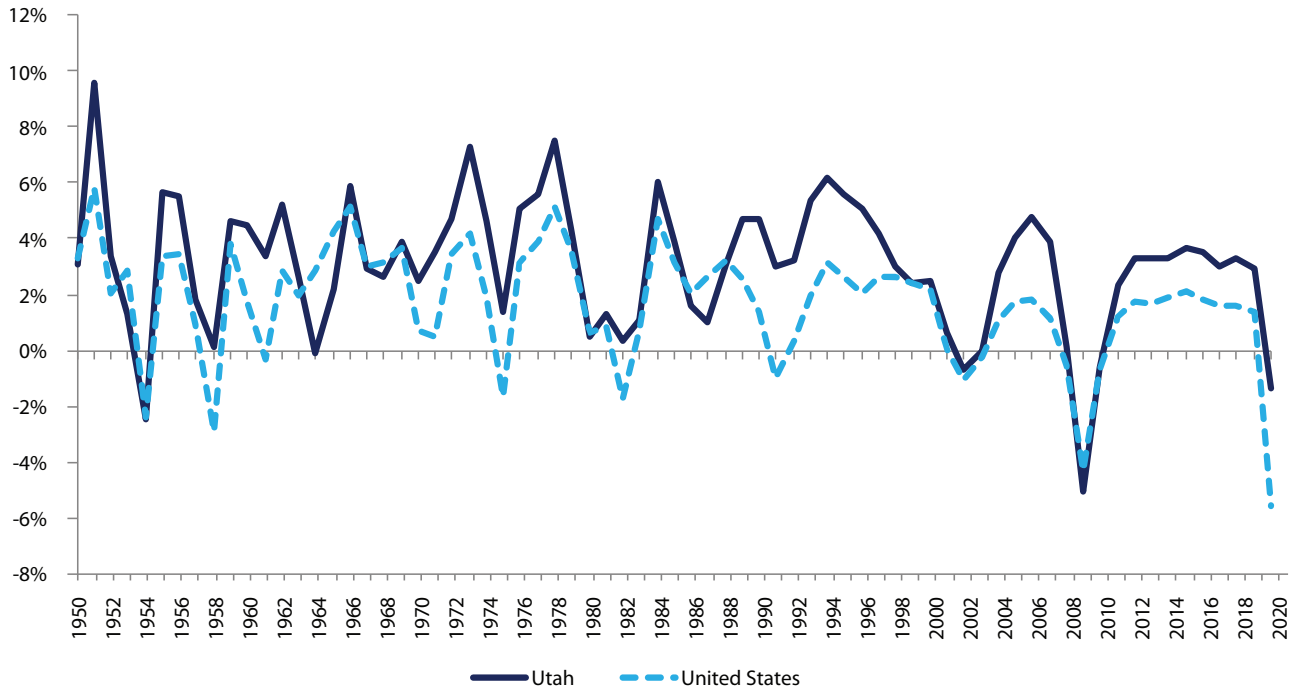
Approaching March and April, Utah's economic performance will still be subpar though incrementally improving. In contrast, without repeating the collapse of 2020, Utah's employment percentage will rise steeply. Beginning in April, high job growth rates will vastly exaggerate the actual, more modest economic performance trending under the surface.

The year's overall employment growth is estimated to measure around 3.8%. Only the mining industry is anticipated to remain lethargic. All other industries should improve and record growth. But again, will be obfuscated due to low prior year comparisons.

For a clearer perspective, these two-year up-and-down economies can be spanned to gauge the underlying impact. If Utah's estimated end-of-2021 employment is compared to the end-of-2019 employment, Utah will have grown its job base by around 2.3%. That is a just-below-average one-year Utah growth rate having taken two years to achieve. A shortfall, yes, but a commendable achievement nonetheless in the midst of a pandemic.

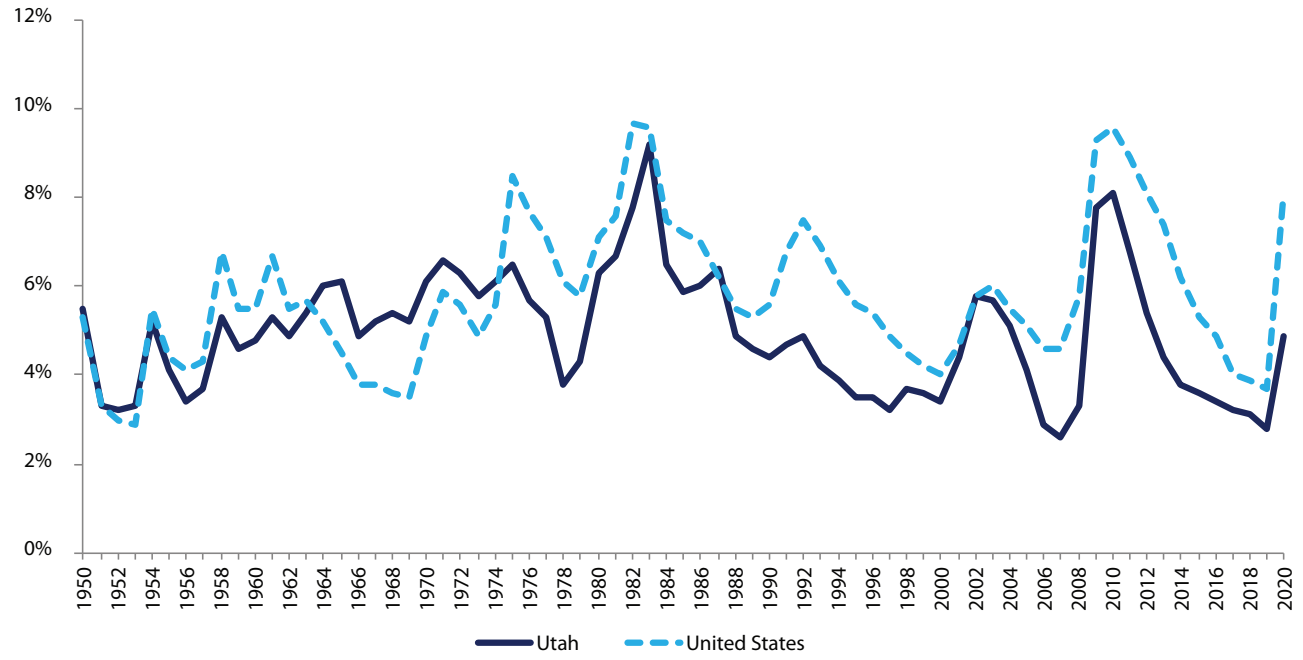
The labor market should continue to improve in 2021 but will not return to full employment. With only one year of job growth occurring (2021) instead of two (2020 and 2021), Utah's natural yearly labor force expansion will not be adequately absorbed. This should keep Utah's 2021 unemployment rate somewhat elevated around 4.0%.

Figure 3.1: Annual Average Job Growth Rate for Utah and the United States



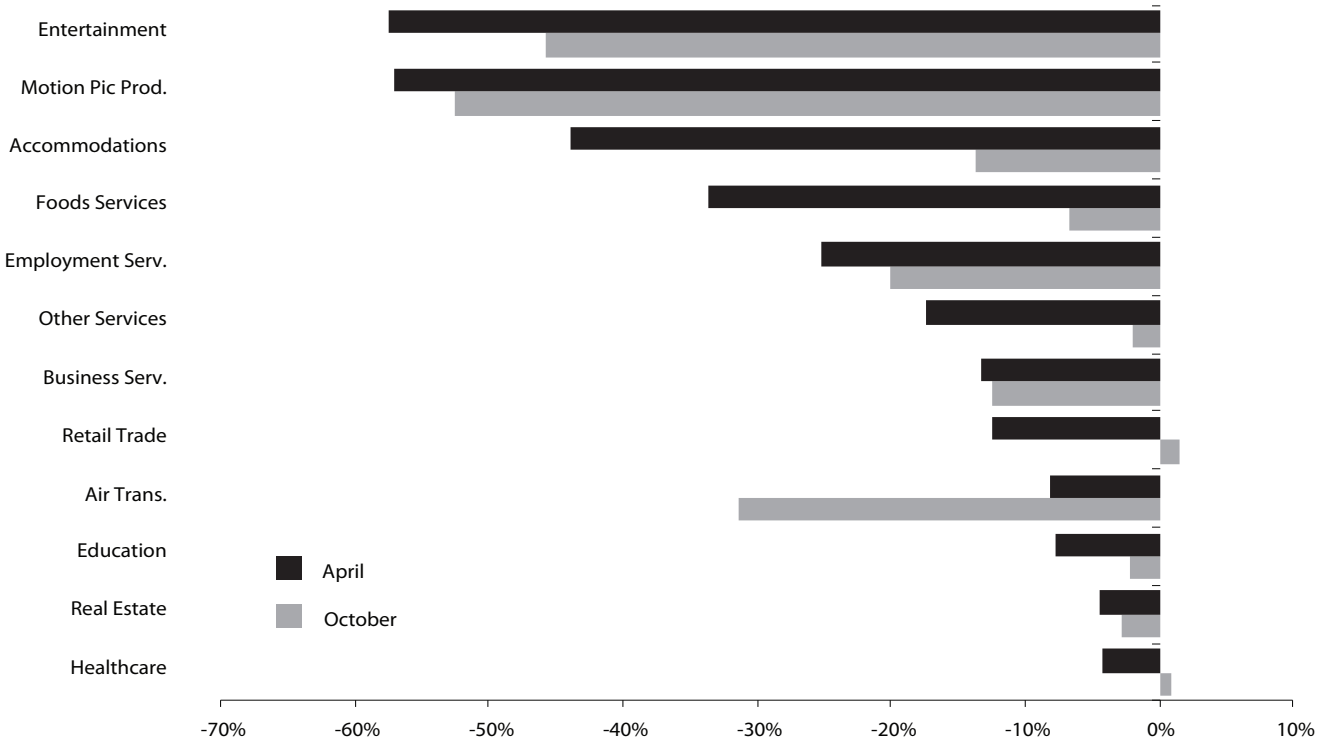
Source: Utah Department of Workforce Services

Figure 3.2: Annual Unemployment Rate for Utah and the United States



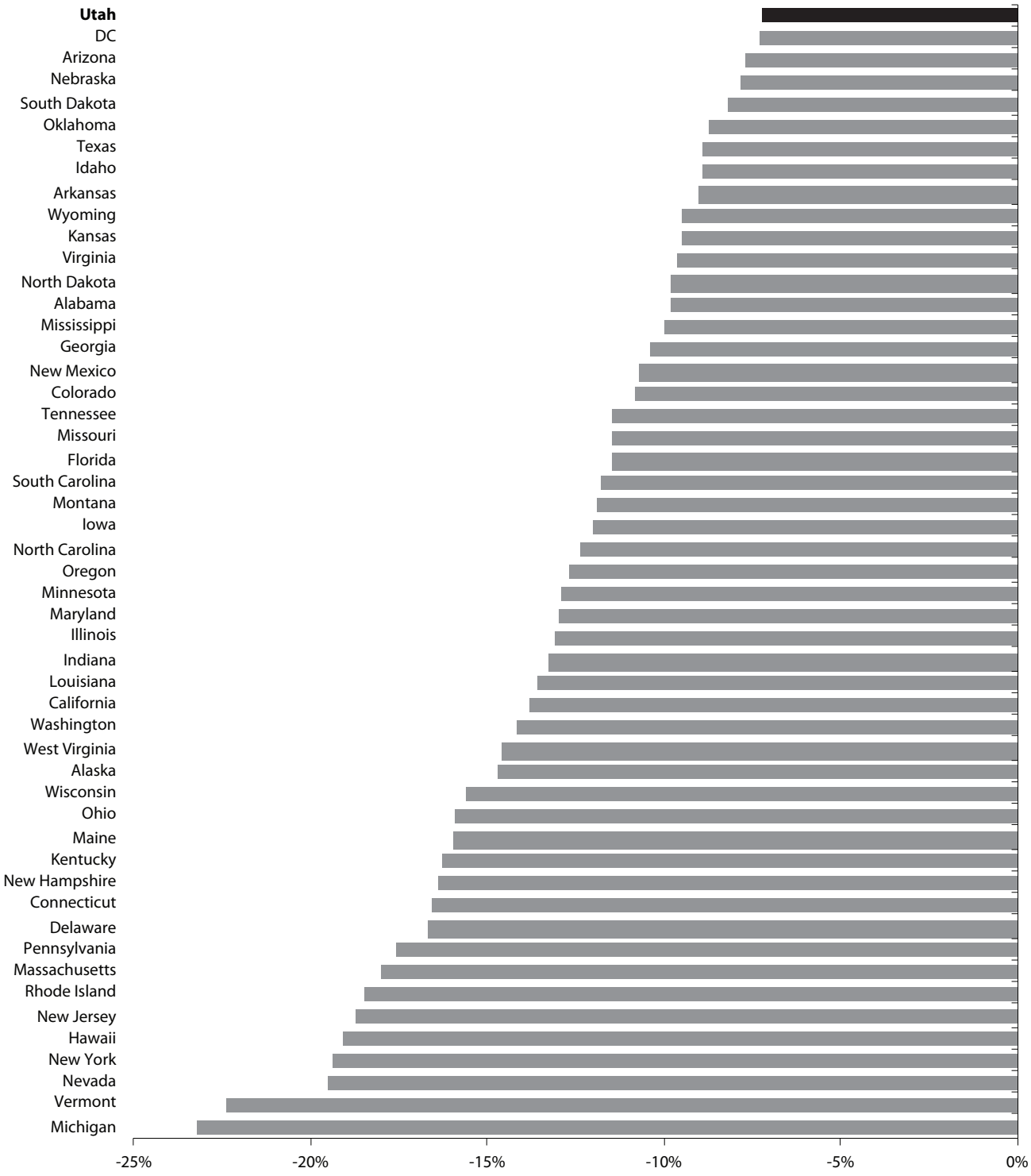
Source: Utah Department of Workforce Services

Figure 3.3: Utah Employment Comparison for Select Industries, Year-over Change, April 2020 and October 2020



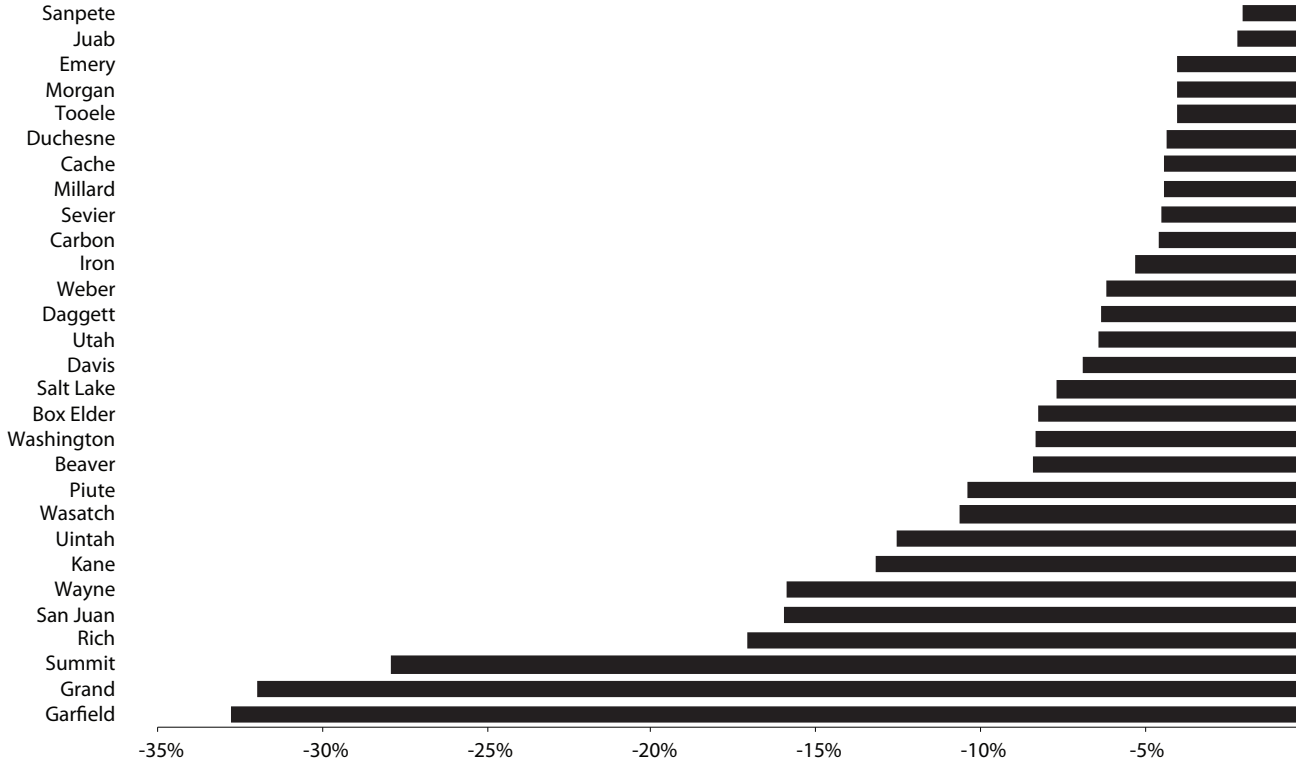
Source: U.S. Bureau of Labor Statistics; Utah Department of Workforce Services

Figure 3.4: Employment Percent Change by State, Year-over, April 2020



Source: U.S. Bureau of Labor Statistics

Figure 3.5: Utah Employment Percent Change by County, Year-over, April 2020



Source: Utah Department of Workforce Services

Table 3.1: Utah Nonfarm Employment and Unemployment Rate, and Labor Force Participation Rate

Year	Payroll Employment	Percent Change	Absolute Change	Unemployment Rate	Utah Labor Force Participation Rate	U.S. Labor Force Participation Rate
1950	189,153	3.1%	5,653	5.5		
1951	207,386	9.6%	18,233	3.3		
1952	214,409	3.4%	7,023	3.2		
1953	217,194	1.3%	2,785	3.3		
1954	211,864	-2.5%	-5,330	5.2		
1955	224,007	5.7%	12,143	4.1		
1956	236,225	5.5%	12,218	3.4		
1957	240,577	1.8%	4,352	3.7		
1958	240,816	0.1%	239	5.3		
1959	251,940	4.6%	11,124	4.6		
1960	263,307	4.5%	11,367	4.8		
1961	272,355	3.4%	9,048	5.3		
1962	286,382	5.2%	14,027	4.9		
1963	293,758	2.6%	7,376	5.4		
1964	293,576	-0.1%	-182	6.0		
1965	300,164	2.2%	6,588	6.1		
1966	317,771	5.9%	17,607	4.9		
1967	326,953	2.9%	9,182	5.2		
1968	335,527	2.6%	8,574	5.4		
1969	348,612	3.9%	13,085	5.2		
1970	357,435	2.5%	8,823	6.1		
1971	369,836	3.5%	12,401	6.6		
1972	387,271	4.7%	17,435	6.3		
1973	415,641	7.3%	28,370	5.8		
1974	434,793	4.6%	19,152	6.1		
1975	441,082	1.4%	6,289	6.5		
1976	463,658	5.1%	22,576	5.7	63.0	61.6
1977	489,580	5.6%	25,922	5.3	63.0	62.3
1978	526,400	7.5%	36,820	3.8	63.2	63.2
1979	549,242	4.3%	22,842	4.3	65.1	63.7
1980	551,889	0.5%	2,647	6.3	65.5	63.8
1981	559,184	1.3%	7,295	6.7	65.4	63.9
1982	560,981	0.3%	1,797	7.8	66.2	64.0
1983	566,991	1.1%	6,010	9.2	65.8	64.0
1984	601,068	6.0%	34,077	6.5	67.1	64.4
1985	624,387	3.9%	23,319	5.9	68.8	64.8
1986	634,138	1.6%	9,751	6.0	69.7	65.3
1987	640,298	1.0%	6,160	6.4	69.5	65.6
1988	660,075	3.1%	19,777	4.9	69.4	65.9
1989	691,244	4.7%	31,169	4.6	71.1	66.5
1990	723,629	4.7%	32,385	4.4	70.9	66.5
1991	745,202	3.0%	21,573	4.7	70.9	66.2
1992	768,602	3.2%	23,488	4.9	71.1	66.5
1993	809,731	5.4%	41,129	4.2	72.2	66.3
1994	859,626	6.2%	49,895	3.9	73.0	66.6
1995	907,886	5.6%	48,260	3.5	72.0	66.6
1996	954,183	5.1%	46,297	3.5	71.5	66.8
1997	993,999	4.2%	39,816	3.2	71.8	67.1
1998	1,023,480	3.0%	29,461	3.7	72.2	67.1
1999	1,048,498	2.4%	25,018	3.6	72.1	67.1
2000	1,074,879	2.5%	26,381	3.4	72.1	67.1
2001	1,081,685	0.6%	6,806	4.4	71.9	66.8
2002	1,073,746	-0.7%	-7,939	5.8	71.6	66.6
2003	1,074,131	0.0%	385	5.7	71.1	66.2
2004	1,104,328	2.8%	30,197	5.1	71.1	66.0
2005	1,148,320	4.0%	43,992	4.1	71.6	66.0
2006	1,203,914	4.8%	55,594	2.9	71.8	66.2
2007	1,251,282	3.9%	47,368	2.6	71.9	66.1
2008	1,252,470	0.1%	1,188	3.3	70.9	66.0
2009	1,188,736	-5.1%	-63,734	7.8	69.2	65.4
2010	1,181,519	-0.6%	-7,217	8.1	68.8	64.7
2011	1,208,650	2.3%	27,131	6.8	67.8	64.1
2012	1,248,935	3.3%	40,285	5.4	67.8	63.7
2013	1,290,523	3.3%	41,588	4.4	68.2	63.3
2014	1,328,143	2.9%	37,620	3.8	68.0	62.9
2015	1,377,744	3.7%	49,601	3.6	68.2	62.7
2016	1,426,450	3.5%	48,706	3.4	68.7	62.8
2017	1,469,134	3.0%	42,707	3.3	68.9	62.9
2018	1,517,602	3.3%	48,468	3.1	68.3	62.9
2019	1,559,859	2.8%	42,257	2.6	68.5	63.1
2020e	1,537,806	-1.4%	-22,053	4.9	67.6	
2021f	1,596,060	3.8%	58,254	4.0	68.3	

Note: e = estimate, f = forecast
Source: Utah Department of Workforce Services, Workforce Research and Analysis

Table 3.2: Utah Labor Force, Nonfarm Jobs, and Wages

Indicator	2017	2018	2019	2020e	2021f	Annual Percent Change			
						2018	2019	2020e	2021f
Civilian Labor Force	1,548,263	1,572,136	1,607,687	1,621,389	1,673,253	1.5%	2.3%	0.9%	3.2%
Employed Persons	1,497,812	1,523,158	1,565,782	1,541,414	1,606,153	1.7%	2.8%	-1.6%	4.2%
Unemployed Persons	50,450	48,978	41,906	79,975	67,100	-2.9%	-14.4%	90.8%	-16.1%
Unemployment Rate	3.3%	3.1%	2.6%	4.9%	4.0%				
U.S. Rate	4.4%	3.9%	3.7%	8.1%	5.7%				
Total Nonfarm Jobs	1,469,125	1,517,423	1,559,746	1,537,806	1,596,060	3.3%	2.8%	-1.4%	3.8%
Mining	8,618	9,470	9,359	8,688	8,600	9.9%	-1.2%	-7.2%	-1.0%
Construction	97,495	104,339	109,491	115,433	123,100	7.0%	4.9%	5.4%	6.6%
Manufacturing	129,198	132,978	136,921	135,549	138,275	2.9%	3.0%	-1.0%	2.0%
Trade, Trans., Utilities	278,526	286,343	290,944	288,090	295,600	2.8%	1.6%	-1.0%	2.6%
Information	38,429	38,052	39,579	38,411	40,450	-1.0%	4.0%	-3.0%	5.3%
Financial Activity	84,072	87,540	90,020	93,303	96,400	4.1%	2.8%	3.6%	3.3%
Professional & Business Services	206,987	217,555	223,900	224,523	230,745	5.1%	2.9%	0.3%	2.8%
Education & Health Services	198,251	203,495	210,018	209,052	212,940	2.6%	3.2%	-0.5%	1.9%
Leisure & Hospitality	143,029	148,503	153,458	134,546	146,500	3.8%	3.3%	-12.3%	8.9%
Other Services	40,209	41,253	42,266	40,826	43,320	2.6%	2.5%	-3.4%	6.1%
Government	244,311	247,895	253,790	249,385	260,130	1.5%	2.4%	-1.7%	4.3%
Goods-producing	235,311	246,787	255,771	259,670	269,975	4.9%	3.6%	1.5%	4.0%
Service-producing	1,233,814	1,270,636	1,303,975	1,278,136	1,326,085	3.0%	2.6%	-2.0%	3.8%
Percent Service-producing	84.0%	83.7%	83.6%	83.1%	83.1%				
U.S. Nonfarm Job Growth %	1.5%	1.7%	1.4%	-5.6%	3.6%				
Total Nonfarm Wages (thousands)	$67,180	$72,270	$77,400	$82,020	$88,520	7.6%	7.1%	6.0%	7.9%
Average Annual Wage	$45,727	$47,627	$49,623	$53,336	$55,462	4.2%	4.2%	7.5%	4.0%
Average Monthly Wage	$3,811	$3,969	$4,135	$4,445	$4,622				
Establishments (first quarter)	98,047	102,758	107,183	110,650	113,638				

Note: Numbers in this table may differ from other tables as not all industrial sectors are listed here.
e = estimate, f = forecast
Source: Utah Department of Workforce Services, Workforce Research and Analysis

Table 3.3: Utah's Largest Employers, Annual Average Employment 2019

Rank	Company Name	Industry	Employment Range
1	University of Utah (Including Hospital)	Higher Education	20,000 +
2	Intermountain Healthcare	Health Care	20,000 +
3	State of Utah	State Government	20,000 +
4	Brigham Young University	Higher Education	15,000-19,999
5	Wal-Mart Associates	Warehouse Clubs/Supercenters	15,000-19,999
6	Hill Air Force Base (civilian employment)	Federal Government	10,000-14,999
7	Amazon.com Services	Courier/Express Delivery Service	10,000-14,999
8	Davis County School District	Public Education	7,000-9,999
9	Utah State University	Higher Education	7,000-9,999
10	Smith's Food and Drug Centers	Grocery Stores	7,000-9,999
11	Granite School District	Public Education	7,000-9,999
12	Alpine School District	Public Education	7,000-9,999
13	Jordan School District	Public Education	7,000-9,999
14	Salt Lake County	Local Government	5,000-6,999
15	Utah Valley University	Higher Education	5,000-6,999
16	U.S. Department of Treasury	Federal Government	5,000-6,999
17	U.S. Postal Service	Federal Government	5,000-6,999
18	The Canyons School District	Public Education	5,000-6,999
19	Delta Airlines	Air Transportation	4,000-4,999
20	The Home Depot	Home Centers	4,000-4,999
21	United Parcel Service	Courier/Express Delivery Service	4,000-4,999
22	Weber County School District	Public Education	4,000-4,999
23	Zions Bancorporation	Banking	4,000-4,999
24	Autoliv	Motor Vehicle Equipment Manufacturing	3,000-3,999
25	ARUP Laboratories, Inc.	Medical Laboratory	3,000-3,999
26	ATK Launch/Space Systems	Aerospace	3,000-3,999
27	Vivint	Electrical Contractors	3,000-3,999
28	Wells Fargo Bank	Banking	3,000-3,999
29	VA Hospital	Health Care	3,000-3,999
30	Maceys	Department Stores	3,000-3,999
31	Discover Products, Inc.	Consumer Loans	3,000-3,999
32	Costco	Warehouse Clubs/Supercenters	3,000-3,999
33	Nebo School District	Public Education	3,000-3,999
34	Salt Lake City School District	Public Education	3,000-3,999
35	Washington County School District	Public Education	3,000-3,999
36	Weber State University	Higher Education	3,000-3,999
37	Salt Lake City Corporation	Local Government	3,000-3,999
38	Harmons	Grocery Stores	3,000-3,999
39	L3 Technologies	Electronics Manufacturing	3,000-3,999
40	SkyWest Airlines	Air Transportation	3,000-3,999
41	America First Credit Union	Banking	3,000-3,999
42	Salt Lake Community College	Higher Education	2,000-2,999
43	Maverick Country Stores	Convenience Stores	2,000-2,999
44	Deseret Industries	Vocational Rehabilitation Services	2,000-2,999
45	DoTERRA International	Direct Selling	2,000-2,999
46	Utah Transit Authority	Public Transportation	2,000-2,999
47	Goldman Sachs	Banking/Investments	2,000-2,999
48	Cache County School District	Public Education	2,000-2,999
49	Target Corporation	Supercenters	2,000-2,999
50	Sizzling Platter, LLC (Sizzler & Little Caesar's)	Restaurants	2,000-2,999

Source: Utah Department of Workforce Services, Workforce Research and Analysis

Personal Income

4

Robert Spendlove, Zions Bank
Drew Maggelet, Zions Bank

2020 OVERVIEW

Utah's total personal income in 2020 was an estimated $170.7 billion, an 8.8% increase from $156.9 billion in 2019. Utah's estimated 2020 per capita income was $52,533, up 7.3% from $48,939 in 2019. Thanks to copious federal aid, both measures of estimated personal income growth in Utah were well above their 2019 levels. Nationally, total personal income grew by 7.4% in 2020 and per capita personal income grew by 6.6%. Utah's 2019 estimated total personal income growth and per capita personal income growth were both higher than the national average.

Total Personal Income

Total personal income (TPI) is the sum of all individual personal income in a given region. There are three components of TPI: 1) net earnings by place of work, adjusted for place of residence; 2) property income, or income from dividends, interest, and rent; and 3) income from transfer receipts, which are benefits received from the government, including: Social Security, Medicare and Medicaid, and veteran's benefits. In 2019, Utah's TPI was $156.9 billion, and of that, net earnings by place of residence comprised the largest share (65.8%). This was followed by property income from dividends, interest, and rent (21.3%), and income from transfer receipts (13.0%).

While Utah's component share of net earnings and property income from dividends, interest, and rent were similar to the national average, its income from transfer receipts was the lowest of any state. Only the District of Columbia had a smaller share of transfer receipt income (12.1%). The three states with the lowest share of transfer receipt income were Utah (12.6%), Colorado (13.2%), and Connecticut (13.4%). The states with the highest share were West Virginia (29.0%), Mississippi (26.4%), and Kentucky (24.1%).

In 2019, Utah's TPI rose 5.8% from $148.2 billion to $156.9 billion. The fastest growing component was transfer receipt income, which grew 8.8% from $18.5 billion to $20.1 billion, and may have been influenced by the state's implementation of Medicaid expansion that year. Net earnings by place of residence rose 6.6% from $95.7 billion to $102.1 billion, and property income from dividends, interest, and rent rose 2.3% from $32.2 billion to $33 billion.

The majority of earnings by place of work, which includes government social insurance, came from wages and salaries (72.3%), followed by supplements to wages and salaries (17.4%), and proprietors' income (12.0%). Utah's earnings by place of work came primarily from nonfarm earnings (98.9%), versus farm earnings (1.1%). This is roughly equivalent to the nonfarm/farm split for the United States (97.2% and 2.8%, respectively).

Of Utah's nonfarm earnings, 84.6% came from the private sector and 15.4% came from the public sector. Within the Utah private sector, the professional, scientific, and technical services sector (12.5%) was the largest source of earnings; followed by manufacturing (11.8%), and health care and social assistance (10.5%). At the national level, health care and social assistance accounted for the largest percentage of private-sector earnings (13.7%); followed by professional, scientific, and technical services (12.4%); and manufacturing (11.6%).

In 2019, all of Utah's broad private-industry classifications experienced growth in earnings. The information sector had the highest year-over-year earnings growth of 11%. Other industries experiencing high growth included professional, scientific, and technical services (10.3%), utilities (8.9%), and construction (8.8%).

Earnings in Utah's public sector, which includes federal civilians, military, and state and local employees, expanded by 6.0% in 2019.

Per Capita Personal Income

Per capita personal income is a region's total personal income divided by its total population.

Personal income and per capita personal income data are reported quarterly by the U.S. Bureau of Economic Analysis. Utah's estimated 2020 per capita personal income was $52,533, up 7.3% from the 2019 level of $48,939. Utah's estimated 2020 per capita income was 87.0% of the national per capita income of $60,355.

In 2019, Utah's total personal income growth rate was the second-highest in the nation, while its per capita personal income level was the seventeenth lowest. This dynamic of high personal income growth but lower per capita income has largely been driven by Utah's young demographic. While total personal income is expanding, per capita personal income is weighed down by many young individuals who are counted in the population but have not yet entered the workforce. As Utah's population continues to age, as is projected, the gap between personal income growth and per capita should continue to narrow.

Per Capita Personal Income by County

Utah experienced per capita personal income growth of 4.1% in 2019, which was lower than its 6.4% growth in 2018. Twenty-eight out of twenty-nine counties experienced per capita personal income gains in 2019, versus 29 out of 29 counties in 2018. The only county to experience per capita personal income decline was Piute. Beaver County experienced the strongest year-over-year growth (12%), while Daggett (11.3%), Rich (7.5%), Box Elder (6.2%), and Millard (5.2%) rounded out the top five counties for growth.

In 2019, Summit County's per capita personal income was the highest in Utah at $151,326, more than three times the state average of $48,939. Summit, along with Wasatch ($59,584) and Grand ($59,196), were the only three counties with an average per capita personal income that exceeded the national average of $56,490. Morgan ($55,967) and Salt Lake ($55,446) were the only other counties to outpace the statewide per capita income average.

2021 OUTLOOK

Utah's total personal income in 2020 was estimated to have grown 8.8%, a massive increase from 5.8% growth in 2019. The state's estimated 2020 per capita personal income growth of 7.3% was also well above the 2019 mark of 4.1%. Utah's 2020 per capita personal income growth also exceeded the national growth of 6.6%.

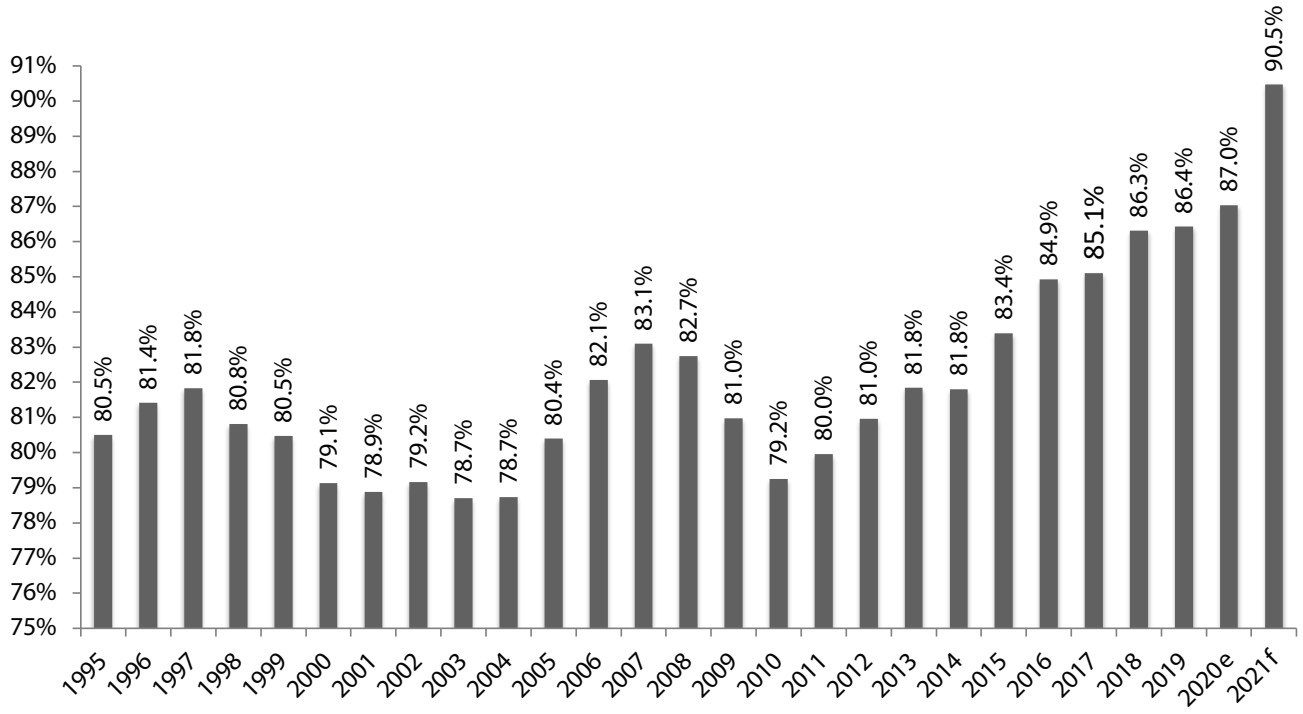
The CARES Act–passed at the end of March–accounted for much of the estimated growth in total personal income in 2020. The act provided support through stimulus checks, sent in varying amounts to most individuals making less than $100,000 and households making less than $200,000; and increased benefit payments for unemployed workers. Government transfers were the only component of personal income to grow in the second quarter, with property income from dividends, interest, and rents; and net earnings both dragging down personal income.

The economic uncertainty of the last year will continue into 2021, especially around personal income. On one hand, future federal stimulus could again stabilize economic growth in the state and nationally until a vaccine is in widespread distribution towards the middle of 2021. On the other hand, a lack of federal aid, combined with more lockdowns, could suppress personal income as businesses struggle to remain open and earnings shrink. Regardless of what happens, a decline in personal income seems likely in the national labor market. Whether that decline comes from a natural reversion to a personal income level expected in an economy that continued 2019 trends or from a deteriorating business environment will likely determine how much personal income contracts in 2021.

In contrast to the national level, Utah looks likely to continue personal income growth in 2021, albeit at a slower pace. Utah already had one of the fastest personal income growth rates in the nation in 2019 and the nearly full recovery of the Utah labor market is likely to contribute to the growth in personal income regardless of federal aid. However, it is possible that economic headwinds could prove too great and result in a slight decline in 2021. Given Utah's nearly full employment level, this seems unlikely.

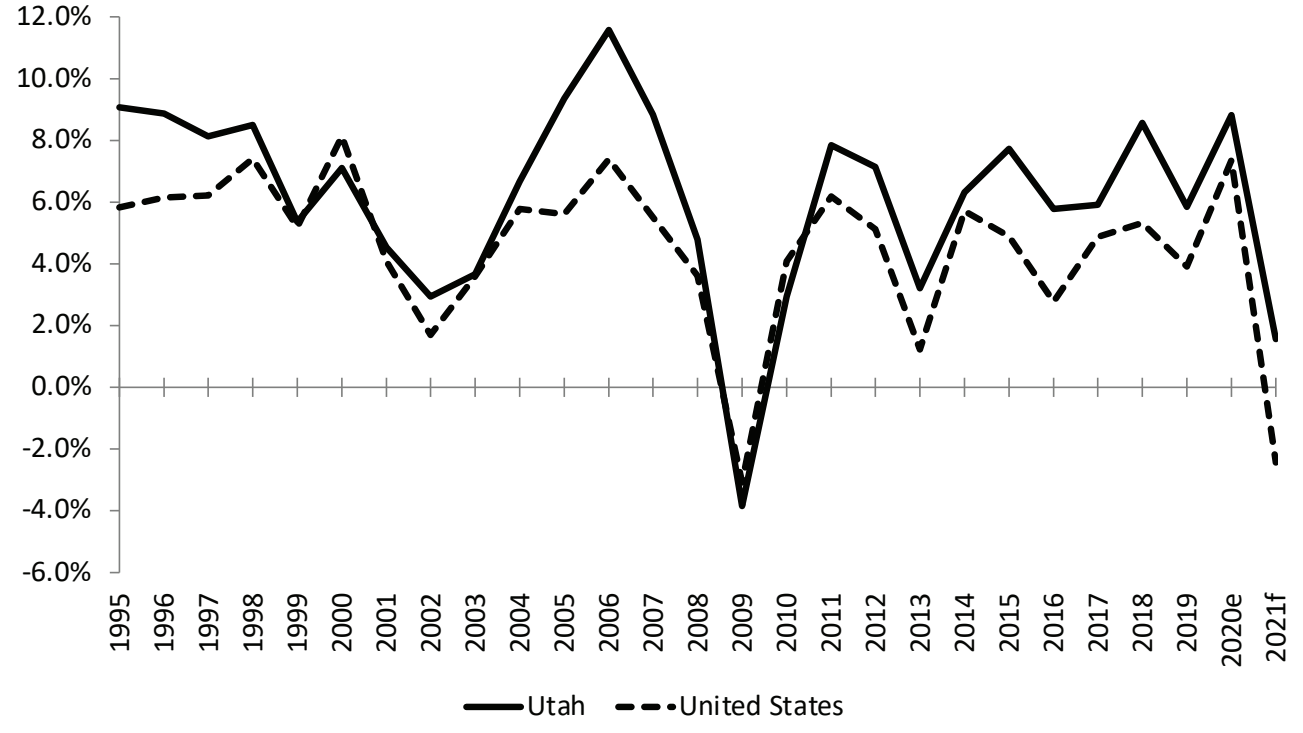
Personal income growth is likely to vary significantly among Utah industries. Those that experienced negative impacts and employment losses in 2020, such as leisure and hospitality, are likely to remain constrained in 2021 without further stimulus. Other relatively unimpacted industries, such as construction, are likely to experience stronger growth in 2021.

Figure 4.1: Utah Per Capita Income as Percent of U.S. Per Capita Income



Note: e = estimate, f = forecast
Source: U.S. Bureau of Economic Analysis and Utah Revenue Assumptions Working Group

Figure 4.2: Utah vs. U.S. Total Personal Income Growth



Note: e = estimate, f = forecast
Source: U.S. Bureau of Economic Analysis and Utah Revenue Assumptions Working Group

Table 4.1: Total and Per Capita Personal Income

Year	Total Personal Income (Millions of Dollars)			Annual Growth Rates		Per Capita Personal Income (Dollars)		
	Utah	United States	Utah as % of U.S.	Utah	United States	Utah	United States	Utah as % of U.S.
1970	$3,791	$865,045	0.44%	11.4%	8.1%	$3,558	$4,245	83.8%
1971	4,243	932,785	0.45%	11.9%	7.8%	3,855	4,510	85.5%
1972	4,741	1,024,456	0.46%	11.7%	9.8%	4,179	4,895	85.4%
1973	5,283	1,140,780	0.46%	11.4%	11.4%	4,520	5,398	83.7%
1974	5,910	1,251,819	0.47%	11.9%	9.7%	4,930	5,868	84.0%
1975	6,591	1,369,389	0.48%	11.5%	9.4%	5,341	6,356	84.0%
1976	7,464	1,502,647	0.50%	13.2%	9.7%	5,866	6,907	84.9%
1977	8,441	1,659,236	0.51%	13.1%	10.4%	6,412	7,550	84.9%
1978	9,712	1,863,721	0.52%	15.1%	12.3%	7,119	8,391	84.8%
1979	10,972	2,082,670	0.53%	13.0%	11.7%	7,748	9,274	83.5%
1980	12,319	2,323,645	0.53%	12.3%	11.6%	8,366	10,226	81.8%
1981	13,893	2,605,118	0.53%	12.8%	12.1%	9,167	11,353	80.7%
1982	15,067	2,791,597	0.54%	8.5%	7.2%	9,669	12,050	80.2%
1983	16,135	2,981,057	0.54%	7.1%	6.8%	10,116	12,751	79.3%
1984	17,820	3,292,716	0.54%	10.4%	10.5%	10,984	13,963	78.7%
1985	19,070	3,524,881	0.54%	7.0%	7.1%	11,607	14,815	78.3%
1986	20,042	3,733,084	0.54%	5.1%	5.9%	12,053	15,546	77.5%
1987	20,995	3,961,598	0.53%	4.8%	6.1%	12,511	16,351	76.5%
1988	22,330	4,283,399	0.52%	6.4%	8.1%	13,218	17,519	75.4%
1989	23,967	4,625,573	0.52%	7.3%	8.0%	14,050	18,741	75.0%
1990	25,985	4,913,791	0.53%	8.4%	6.2%	15,010	19,685	76.3%
1991	27,864	5,084,914	0.55%	7.2%	3.5%	15,656	20,100	77.9%
1992	30,126	5,420,868	0.56%	8.1%	6.6%	16,401	21,133	77.6%
1993	32,491	5,657,948	0.57%	7.9%	4.4%	17,115	21,768	78.6%
1994	35,157	5,947,110	0.59%	8.2%	5.1%	17,933	22,602	79.3%
1995	38,308	6,291,376	0.61%	9.0%	5.8%	19,019	23,627	80.5%
1996	41,739	6,678,529	0.62%	9.0%	6.2%	20,183	24,791	81.4%
1997	45,125	7,092,489	0.64%	8.1%	6.2%	21,288	26,013	81.8%
1998	48,266	7,606,662	0.63%	7.0%	7.2%	22,284	27,575	80.8%
1999	50,851	8,001,868	0.64%	5.4%	5.2%	23,078	28,676	80.5%
2000	54,466	8,652,601	0.63%	7.1%	8.1%	24,266	30,665	79.1%
2001	56,933	9,005,595	0.63%	4.5%	4.1%	24,930	31,602	78.9%
2002	58,605	9,158,965	0.64%	2.9%	1.7%	25,208	31,843	79.2%
2003	60,749	9,487,549	0.64%	3.7%	3.6%	25,739	32,704	78.7%
2004	64,803	10,035,076	0.65%	6.7%	5.8%	26,984	34,272	78.7%
2005	70,862	10,598,246	0.67%	9.3%	5.6%	28,832	35,863	80.4%
2006	79,063	11,381,708	0.69%	11.6%	7.4%	31,306	38,145	82.1%
2007	86,046	12,007,782	0.72%	8.8%	5.5%	33,123	39,862	83.1%
2008	90,162	12,442,208	0.72%	4.8%	3.6%	33,857	40,916	82.7%
2009	86,696	12,059,109	0.72%	-3.8%	-3.1%	31,833	39,310	81.0%
2010	89,242	12,551,597	0.71%	2.9%	4.1%	32,156	40,577	79.2%
2011	96,245	13,326,770	0.72%	7.8%	6.2%	34,200	42,772	80.0%
2012	103,121	14,010,140	0.74%	7.1%	5.1%	36,139	44,636	81.0%
2013	106,427	14,181,095	0.75%	3.2%	1.2%	36,725	44,869	81.8%
2014	113,141	14,991,715	0.75%	6.3%	5.7%	38,517	47,087	81.8%
2015	121,885	15,724,240	0.78%	7.7%	4.9%	40,867	49,004	83.4%
2016	128,929	16,160,714	0.80%	5.8%	2.8%	42,375	49,900	84.9%
2017	136,544	16,948,592	0.81%	5.9%	4.9%	44,178	51,911	85.1%
2018	148,241	17,851,832	0.83%	8.6%	5.3%	47,008	54,465	86.3%
2019	156,896	18,551,503	0.85%	5.8%	3.9%	48,939	56,618	86.4%
2020e	170,732	19,917,000	0.86%	8.8%	7.4%	52,533	60,355	87.0%
2021f	173,413	19,431,000	0.89%	1.6%	-2.4%	52,789	58,351	90.5%

Note: All dollar amounts are in current dollars (not adjusted for inflation).
e = estimate, f = forecast
Source: U.S. Bureau of Economic Analysis. Last updated: September 24, 2019—revised statistics for 1998–2018. 2019e and 2020f data from Utah Revenue Assumptions Working Group, September 2019 Short-Run Economic Forecast.

Table 4.2: Per Capita Personal Income by County

County	2014	2015	2016	2017	2018	2019	2014-15	2015-16	2016-17	2017-18	2018-19
State of Utah	$38,517	$40,867	$42,375	$44,178	$47,008	$48,939	6.1%	3.7%	4.3%	6.4%	4.1%
Summit	97,737	112,627	117,039	125,933	146,004	151,326	15.2%	3.9%	7.6%	15.9%	3.6%
Wasatch	41,030	42,997	46,350	51,161	57,452	59,584	4.8%	7.8%	10.4%	12.3%	3.7%
Grand	40,852	42,985	48,147	51,182	56,312	59,196	5.2%	12.0%	6.3%	10.0%	5.1%
Morgan	43,655	46,538	48,150	49,457	53,457	55,967	6.6%	3.5%	2.7%	8.1%	4.7%
Salt Lake	43,876	45,747	48,054	50,097	53,079	55,446	4.3%	5.0%	4.3%	6.0%	4.5%
Davis	38,797	40,789	42,833	43,944	46,281	48,423	5.1%	5.0%	2.6%	5.3%	4.6%
Daggett	35,209	37,029	38,222	40,423	42,920	47,753	5.2%	3.2%	5.8%	6.2%	11.3%
Piute	34,967	38,793	37,879	44,175	44,494	44,169	10.9%	-2.4%	16.6%	0.7%	-0.7%
Weber	33,269	35,683	37,454	39,915	41,916	43,707	7.3%	5.0%	6.6%	5.0%	4.3%
Utah	34,670	37,427	37,837	38,878	41,269	42,995	8.0%	1.1%	2.8%	6.2%	4.2%
Wayne	30,511	32,761	33,807	38,074	40,894	42,426	7.4%	3.2%	12.6%	7.4%	3.7%
Cache	32,527	34,456	35,600	37,662	40,325	41,811	5.9%	3.3%	5.8%	7.1%	3.7%
Kane	31,163	33,039	34,775	39,430	40,673	41,502	6.0%	5.3%	13.4%	3.2%	2.0%
Beaver	34,100	35,202	34,708	33,293	36,524	40,889	3.2%	-1.4%	-4.1%	9.7%	12.0%
Washington	32,821	33,718	34,463	37,043	40,053	40,886	2.7%	2.2%	7.5%	8.1%	2.1%
Rich	31,564	32,903	34,269	35,114	37,994	40,845	4.2%	4.2%	2.5%	8.2%	7.5%
Carbon	40,706	35,676	32,963	36,062	39,307	40,679	-12.4%	-7.6%	9.4%	9.0%	3.5%
Box Elder	31,720	34,189	34,750	36,102	38,237	40,621	7.8%	1.6%	3.9%	5.9%	6.2%
Garfield	29,856	32,557	33,159	37,715	38,305	39,900	9.0%	1.8%	13.7%	1.6%	4.2%
Juab	38,474	39,110	34,053	33,999	38,148	39,103	1.7%	-12.9%	-0.2%	12.2%	2.5%
Tooele	33,459	35,372	34,272	35,044	36,904	38,446	5.7%	-3.1%	2.3%	5.3%	4.2%
Millard	28,558	29,927	30,534	34,591	36,451	38,336	4.8%	2.0%	13.3%	5.4%	5.2%
Duchesne	33,748	30,850	28,722	35,610	36,171	37,869	-8.6%	-6.9%	24.0%	1.6%	4.7%
Sevier	27,434	29,323	31,175	33,057	36,126	37,558	6.9%	6.3%	6.0%	9.3%	4.0%
Emery	29,448	29,463	29,775	31,022	34,057	35,177	0.1%	1.1%	4.2%	9.8%	3.3%
Iron	28,000	29,063	29,410	31,119	33,195	34,353	3.8%	1.2%	5.8%	6.7%	3.5%
Uintah	34,107	30,715	28,580	30,173	31,688	32,241	-9.9%	-7.0%	5.6%	5.0%	1.7%
Sanpete	25,867	28,512	27,233	27,956	29,906	30,592	10.2%	-4.5%	2.7%	7.0%	2.3%
San Juan	23,403	23,727	24,069	25,591	26,863	28,074	1.4%	1.4%	6.3%	5.0%	4.5%

Note: All dollar amounts are in current dollars (not adjusted for inflation).
Source: U.S. Bureau of Economic Analysis. Last updated: November 17, 2020—new statistics for 2019; revised statistics for 1969–2018.

Gross Domestic Product by State

5

Andrea Wilko, Utah Legislative Fiscal Analyst Office

2019 OVERVIEW

Gross domestic product (GDP) by state details the value of final goods and services produced in a state. It is a common indicator used to track the economic health of the nation or a state. Conceptually, GDP by state is gross output less intermediate inputs, and as such it measures the economic activity within the state. Real GDP controls for inflation by using "chained" dollars (a weighted average of data in successive pairs of years), which is a more meaningful measure of GDP over time. The Bureau of Economic Analysis (BEA) releases GDP data annually in June.

Nominal GDP

Utah's nominal GDP (measured in current dollars) was estimated to be $192.5 billion in 2019, up from $181.6 billion in 2018. This represents a growth rate of 6.0% which ranked the 2nd highest in the nation. The Utah GDP growth rate of 6.0% is a deceleration in growth over the previous three years. National GDP grew about 3.0% in 2018, its biggest gain in more than a decade.

Real GDP

Utah's real GDP (measured in 2012 chained dollars) was $168.8 billion in 2019, up from $162.6 billion in 2018. This represents a growth rate of 3.8%. From 2018 to 2019 the nation's GDP grew by 2.1% after adjusting for inflation. At -0.5% in 2020 Utah's GDP growth is expected to remain above the national average of -3.5. From the first quarter in 2015 through the first quarter in 2020, Utah's economy grew at an annual rate of 3.4%, compared to the 1.9% national GDP growth rate.

Industry Growth

Financial activities represent the largest sector of GDP in Utah at 22.7% in 2019, followed by trade, transportation and utilities at 16.7% of total GDP.

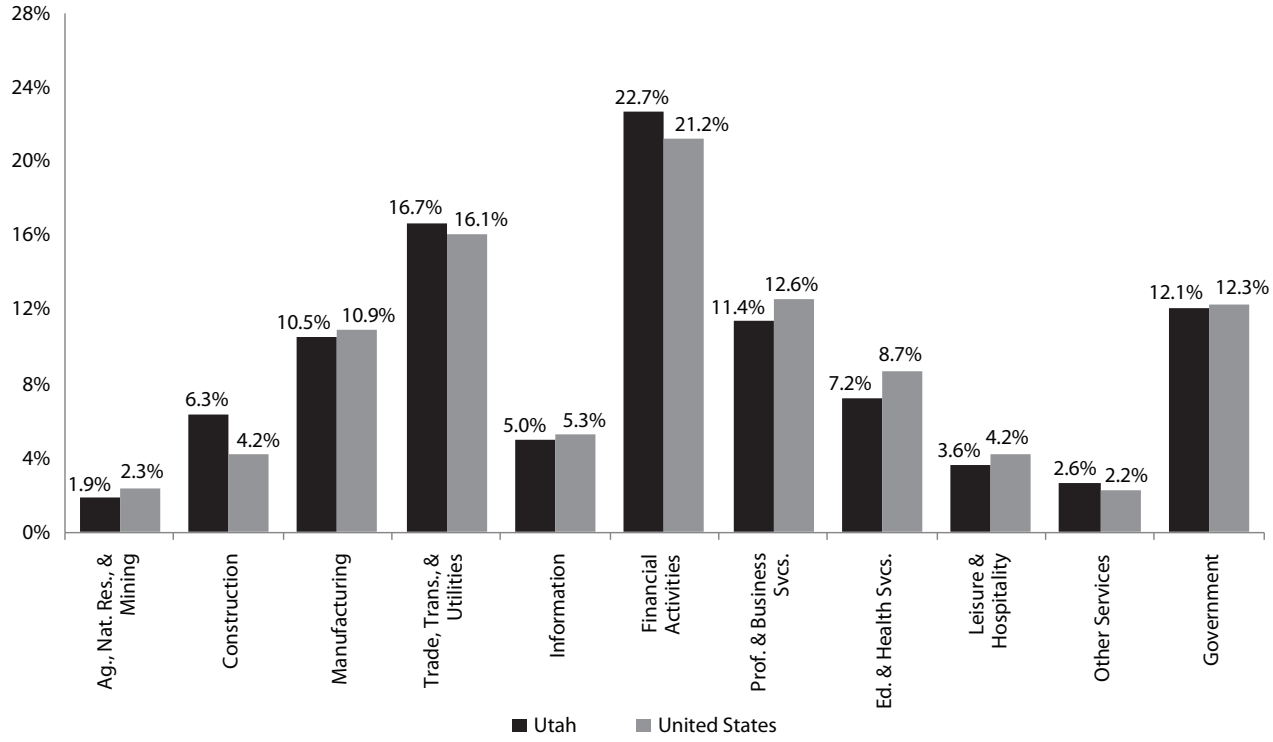
In 2019, the finance, insurance, real estate, rental, and leasing industries added the most real value to the gross domestic product of Utah. These industries added about 33.6 billion chained 2012 U.S. dollars to the GDP of Utah in 2019.

2020/2021 OUTLOOK

The pandemic is expected to create an unprecedented volatility in national and state GDP for 2020. U.S. GDP has not yet fully recovered from the losses suffered in the first six months of the year. As a result, U.S. GDP is expected to shrink by 3.5% in 2020. Utah has fared quite a bit better and its GDP is expected to shrink by only 0.5%.

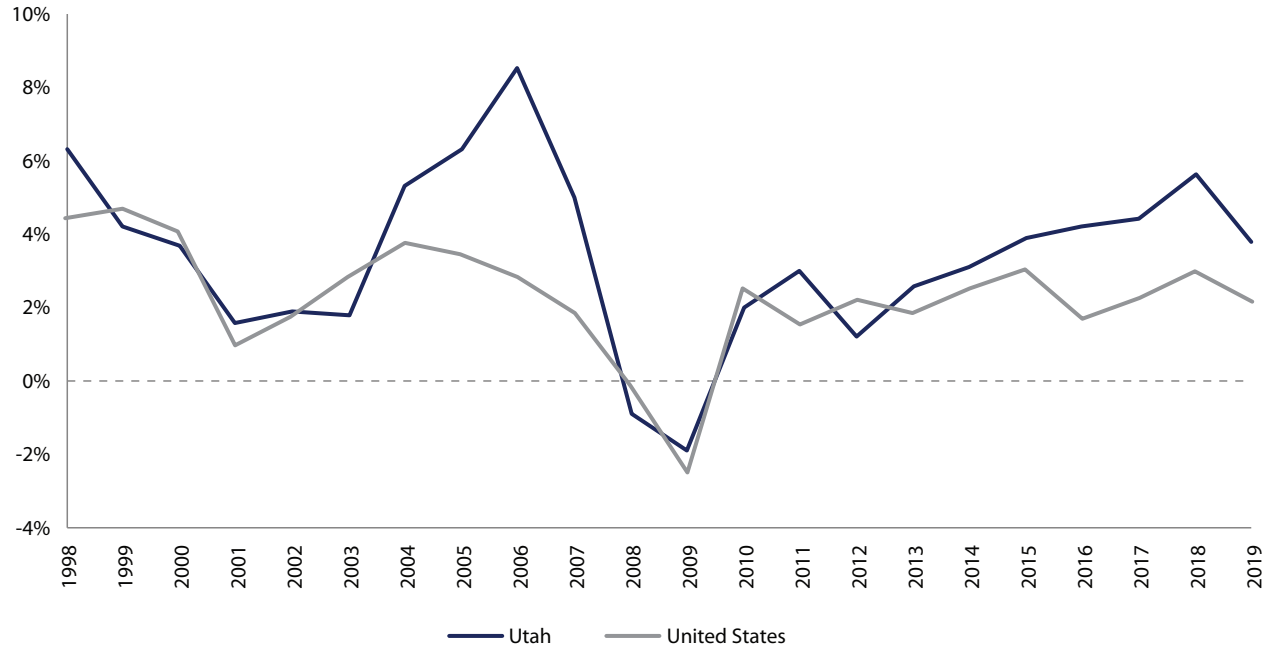
While both Utah and U.S. GDP have partially recovered from a contraction in the first half of 2020, a variety of factors will determine how the recovery unfolds in 2021. Key variables include: a) the scale of the ongoing COVID-19 resurgence and any resulting closures, b) the status of labor markets and household consumption, c) the size and timing of additional fiscal stimulus, d) the timing and availability of a COVID-19 vaccine, and e) the degree to which volatility in the US political transition affects consumer and business confidence. Currently GDP growth for Utah is expected to be 8.2% in 2021 and national GDP growth is expected to reach 3.7%.

Figure 5.1: Percent of Gross Domestic Product by Industry, 2019



Source: Bureau of Economic Analysis

Figure 5.2: Utah vs. United States Real Gross Domestic Product Growth



Source: Bureau of Economic Analysis

Table 5.1: Nominal Gross Domestic Product (GDP) by State

State	Millions of Dollars						2019 Share of Total	2018 –19 Change
	2014	2015	2016	2017	2018	2019		
United States	$17,527,258	$18,238,301	$18,745,075	$19,542,980	$20,611,861	$21,433,226	100.0%	4.0%
Alabama	195,038	200,198	204,455	210,896	221,031	228,143	1.1%	3.2%
Alaska	55,751	50,728	49,756	51,737	54,293	54,386	0.3%	0.2%
Arizona	284,851	298,615	313,057	330,147	350,718	370,119	1.7%	5.5%
Arkansas	116,152	117,734	119,192	122,979	127,761	130,954	0.6%	2.5%
California	2,399,078	2,559,643	2,671,101	2,831,038	2,975,083	3,132,801	14.6%	5.3%
Colorado	305,691	317,992	327,757	348,176	372,453	392,986	1.8%	5.5%
Connecticut	248,779	262,373	266,747	272,570	279,782	287,822	1.3%	2.9%
Delaware	67,550	71,548	69,284	69,899	74,187	77,082	0.4%	3.9%
District of Columbia	119,723	124,854	129,477	132,854	138,774	143,389	0.7%	3.3%
Florida	840,386	897,755	941,561	990,097	1,050,298	1,106,500	5.2%	5.4%
Georgia	485,283	515,753	541,292	568,399	602,024	625,714	2.9%	3.9%
Hawaii	77,819	82,644	85,900	89,619	93,101	95,744	0.4%	2.8%
Idaho	63,799	66,082	69,076	73,287	79,091	83,666	0.4%	5.8%
Illinois	766,121	795,326	803,944	823,776	863,040	885,583	4.1%	2.6%
Indiana	325,008	329,528	337,217	350,436	368,425	379,684	1.8%	3.1%
Iowa	172,122	179,459	179,940	182,151	190,147	194,658	0.9%	2.4%
Kansas	148,943	154,016	159,233	163,968	171,719	176,493	0.8%	2.8%
Kentucky	186,419	192,819	195,840	200,346	207,849	215,399	1.0%	3.6%
Louisiana	237,717	231,752	223,410	235,712	253,236	256,919	1.2%	1.5%
Maine	55,827	57,560	59,754	61,672	64,557	67,717	0.3%	4.9%
Maryland	353,249	370,768	387,620	399,738	411,619	426,747	2.0%	3.7%
Massachusetts	473,052	503,179	519,144	539,973	570,464	596,593	2.8%	4.6%
Michigan	448,572	473,150	488,963	501,915	521,803	536,888	2.5%	2.9%
Minnesota	322,690	333,066	341,696	353,416	371,930	383,777	1.8%	3.2%
Mississippi	103,520	105,428	106,493	109,431	113,579	115,971	0.5%	2.1%
Missouri	284,237	293,938	297,753	305,471	317,949	328,401	1.5%	3.3%
Montana	44,608	46,269	45,680	47,947	50,692	52,935	0.2%	4.4%
Nebraska	111,387	115,664	116,879	120,950	124,705	130,012	0.6%	4.3%
Nevada	134,518	143,554	150,287	158,503	169,180	178,199	0.8%	5.3%
New Hampshire	72,304	75,832	78,509	80,838	84,584	87,634	0.4%	3.6%
New Jersey	545,465	569,117	581,504	590,697	612,979	634,784	3.0%	3.6%
New Mexico	92,586	91,322	91,240	94,457	100,080	105,143	0.5%	5.1%
New York	1,425,724	1,485,621	1,545,988	1,608,890	1,705,010	1,772,261	8.3%	3.9%
North Carolina	476,260	502,808	520,357	541,041	567,452	591,601	2.8%	4.3%
North Dakota	58,680	55,069	50,792	52,607	56,287	57,181	0.3%	1.6%
Ohio	592,876	609,322	621,543	642,351	675,030	695,362	3.2%	3.0%
Oklahoma	193,546	184,140	177,813	185,486	198,596	202,036	0.9%	1.7%
Oregon	188,778	202,719	214,618	227,042	241,978	253,623	1.2%	4.8%
Pennsylvania	691,173	711,787	726,885	745,141	778,375	808,738	3.8%	3.9%
Rhode Island	54,298	56,561	57,529	58,117	59,925	61,884	0.3%	3.3%
South Carolina	191,982	204,000	213,585	223,414	235,287	247,544	1.2%	5.2%
South Dakota	46,370	47,631	48,731	50,343	53,239	54,941	0.3%	3.2%
Tennessee	303,789	323,659	334,436	346,283	362,737	376,582	1.8%	3.8%
Texas	1,568,071	1,564,374	1,567,687	1,665,428	1,795,635	1,843,803	8.6%	2.7%
Utah	141,528	148,918	157,443	167,613	181,623	192,519	0.9%	6.0%
Vermont	29,691	30,664	31,430	32,041	32,981	34,013	0.2%	3.1%
Virginia	464,514	484,531	496,570	511,876	533,510	556,905	2.6%	4.4%
Washington	442,930	471,703	493,635	527,708	575,417	612,997	2.9%	6.5%
West Virginia	71,769	70,816	70,006	72,853	77,633	78,864	0.4%	1.6%
Wisconsin	293,837	306,499	313,440	320,610	337,553	349,417	1.6%	3.5%
Wyoming	39,432	37,861	35,704	37,271	39,703	40,420	0.2%	1.8%

Last updated: October 2, 2020-- revised statistics for 1997-2019.
Source: Bureau of Economic Analysis

Table 5.2: Real Gross Domestic Product (GDP) by State

State	Millions of Chained 2012 Dollars						2019 Share of Total	2018–19 Change
	2014	2015	2016	2017	2018	2019		
United States	$16,912,038	$17,432,170	$17,730,509	$18,144,105	$18,687,786	$19,091,662	100.0%	2.2%
Alabama	187,568	189,429	191,523	193,693	198,054	200,829	1.1%	1.4%
Alaska	53,481	54,015	53,289	52,826	52,929	53,255	0.3%	0.6%
Arizona	274,113	281,936	291,260	302,118	314,016	323,598	1.7%	3.1%
Arkansas	111,730	112,939	113,490	114,951	116,699	117,447	0.6%	0.6%
California	2,316,331	2,437,367	2,519,134	2,628,315	2,708,967	2,800,505	14.7%	3.4%
Colorado	294,812	308,899	315,793	328,510	342,866	356,280	1.9%	3.9%
Connecticut	237,700	245,305	245,966	248,077	249,043	251,330	1.3%	0.9%
Delaware	64,124	66,527	62,889	61,851	63,163	64,319	0.3%	1.8%
District of Columbia	114,815	117,011	119,420	120,211	122,662	123,929	0.6%	1.0%
Florida	806,029	842,269	870,963	901,904	936,580	963,256	5.0%	2.8%
Georgia	465,138	484,378	500,909	519,453	538,731	547,423	2.9%	1.6%
Hawaii	74,491	77,177	79,094	81,040	82,204	82,471	0.4%	0.3%
Idaho	61,663	63,236	65,643	68,412	72,455	74,937	0.4%	3.4%
Illinois	735,876	747,667	746,370	752,459	769,631	773,136	4.0%	0.5%
Indiana	313,831	311,850	316,546	322,969	332,157	337,636	1.8%	1.6%
Iowa	165,641	170,546	169,489	168,977	172,845	173,515	0.9%	0.4%
Kansas	144,132	147,930	152,512	154,457	158,193	160,059	0.8%	1.2%
Kentucky	179,889	182,488	183,455	184,601	187,507	190,812	1.0%	1.8%
Louisiana	232,746	230,434	225,362	228,819	235,022	239,967	1.3%	2.1%
Maine	53,445	53,879	55,088	55,965	57,303	58,793	0.3%	2.6%
Maryland	339,991	349,147	359,988	365,857	368,810	374,039	2.0%	1.4%
Massachusetts	453,778	471,979	479,185	490,874	507,806	519,962	2.7%	2.4%
Michigan	430,936	442,288	451,026	457,342	467,828	471,648	2.5%	0.8%
Minnesota	312,084	316,863	321,980	327,668	337,216	341,041	1.8%	1.1%
Mississippi	99,501	100,014	100,412	101,072	102,062	102,656	0.5%	0.6%
Missouri	272,787	276,317	276,211	279,264	284,696	287,659	1.5%	1.0%
Montana	43,285	45,043	44,581	45,481	46,628	47,916	0.3%	2.8%
Nebraska	107,394	110,753	111,612	113,754	115,088	117,395	0.6%	2.0%
Nevada	129,405	134,892	138,639	143,591	149,663	153,729	0.8%	2.7%
New Hampshire	69,507	71,419	73,023	74,254	76,165	77,240	0.4%	1.4%
New Jersey	524,420	535,285	540,380	540,657	549,001	556,731	2.9%	1.4%
New Mexico	89,372	91,680	91,714	91,772	93,871	98,766	0.5%	5.2%
New York	1,347,560	1,372,232	1,397,724	1,424,906	1,467,077	1,490,679	7.8%	1.6%
North Carolina	455,296	469,536	477,524	489,027	501,955	511,540	2.7%	1.9%
North Dakota	56,555	55,067	51,137	51,291	53,473	53,930	0.3%	0.9%
Ohio	571,425	579,943	585,045	592,726	606,142	615,474	3.2%	1.5%
Oklahoma	186,307	193,238	188,063	188,157	193,205	197,900	1.0%	2.4%
Oregon	181,755	191,864	201,060	209,581	219,280	225,337	1.2%	2.8%
Pennsylvania	666,556	682,527	691,316	695,561	708,857	726,166	3.8%	2.4%
Rhode Island	52,006	52,958	53,030	52,728	53,136	53,668	0.3%	1.0%
South Carolina	183,580	190,294	196,477	202,645	209,013	214,934	1.1%	2.8%
South Dakota	44,450	45,372	45,734	46,024	47,287	47,560	0.2%	0.6%
Tennessee	291,662	302,970	308,157	314,850	323,317	328,406	1.7%	1.6%
Texas	1,518,614	1,595,970	1,606,580	1,651,330	1,715,231	1,764,357	9.2%	2.9%
Utah	136,325	141,602	147,556	153,986	162,574	168,793	0.9%	3.8%
Vermont	28,510	28,877	29,206	29,312	29,565	29,806	0.2%	0.8%
Virginia	446,791	455,830	460,185	468,125	478,835	489,168	2.6%	2.2%
Washington	426,482	446,628	463,974	489,435	524,487	548,687	2.9%	4.6%
West Virginia	69,721	70,333	69,276	69,743	71,859	72,340	0.4%	0.7%
Wisconsin	282,031	288,260	291,321	294,152	303,767	308,045	1.6%	1.4%
Wyoming	38,711	39,899	38,080	37,866	38,696	39,214	0.2%	1.3%

Last updated: October 2, 2020-- revised statistics for 1997-2019.
Source: Bureau of Economic Analysis

6. Utah Taxable Sales

6

Eric Cropper, Utah State Tax Commission

2020 OVERVIEW

The pandemic and recession of 2020 significantly impacted Utah taxable sales, which are comprised of sales and purchases subject to sales and use tax. Although growth in total taxable sales in 2020 was similar to past year (increasing by an estimated 5.8% over the prior year to $72.9 billion), there was significant variation in performance of the various sectors. Taxable services declined by an estimated 7.8% in 2020. This decline is attributed to a decrease in consumer spending in industries such as accommodation, recreation, entertainment, and food services where social distancing is more difficult. Conversely, retail sales increased by an estimated 13.3% in 2020. This sector benefited as consumers increased online spending as well as spending in certain segments such as grocery and home improvement. Retail sales also benefited significantly from recent legislation which required marketplace facilitators to begin collecting sales tax on facilitated transactions. Business investment purchases also performed well in 2020, growing by an estimated 7.3%. Conversely, all other sales, which only comprise a small portion of taxable sales, declined by an estimated 6.4%.

Retail Sales

In 2020, retail sales, which account for just over 57% of all taxable sales, increased by an estimated 13.3% to approximately $41.7 billion. This is one of the largest year-over-year growth rates ever recorded in retail sales. High growth in this sector was driven by changing consumer spending patterns due to the pandemic, federal fiscal stimulus, and recent state legislation. For much of 2020, consumers shifted spending from service-based industries where social distancing was difficult to retail industries related to "at home" expenditures such as grocery stores, home improvement, and online shopping. Additionally, despite the recession brought on by the pandemic, overall personal income and consumer spending remained relatively strong, partially due to the injection of federal fiscal stimulus. Retail sales also benefited significantly in 2020 from recent state legislation which required marketplace facilitators that meet certain requirements to begin collecting and remitting sales and use tax on each sale the marketplace facilitator makes on its own behalf or that it makes or facilitates on behalf of a marketplace seller. It is estimated that taxable sales from marketplace facilitators accounted for approximately $2.4 billion in 2020, with the majority of those sales occurring in the retail sector.

Business Investment Purchases

Notwithstanding the pandemic and a recession, business investment purchases increased by an estimated 7.3% to $11.1 billion in 2020. Growth in this sector was led by the construction, manufacturing, and wholesale durable goods industries. These industries also appear to have benefited from changing consumption patterns due to the pandemic as businesses and consumers purchased goods and equipment for both working and recreating at home. While most business investment industries had strong growth in 2020, the oil and gas industry saw a significant decline. The decline in this industry was triggered by record low oil prices during portions of the year. These low oil prices are attributed to global supply and demand issues brought on largely by the pandemic.

Taxable Services

In Utah, only a limited number of service industries are subject to sales tax. In 2020 overall taxable services decreased by an estimated 7.8% to $17.6 billion. Many of the largest industries in this sector, which include accommodations, recreation, entertainment, and food services, were among the hardest hit industries due to the pandemic. These industries decreased the most in April when some of the most restrictive health orders were in place. In April the accommodation industry was down approximately 86% over the prior year, the arts entertainment and recreation industry was down 71%, and the food service industry was down 37%. These industries have made substantial progress in recovering from these lows but are still down

compared to the prior year as of the end of 2020. The utility industry, which is also included in the taxable services sector, maintained positive growth in 2020 which offset some of the decreases from the other hard-hit industries in this sector.

All Other

The category "All Other" consists of transaction types such as private motor vehicle sales and prior period refunds/payments that do not fit into the other sectors. This category also includes sales remitted by taxpayers where an industry NAICS code could not be determined. In 2020, this sector, which comprises less than 4% of total taxable sales, decreased by an estimated 6.4%. This decrease is primarily due to a decline in prior period payments, which varies significantly from year to year. The decrease is also partially attributable to a decline in special event sales which have also been significantly impacted by the pandemic.

2021 OUTLOOK

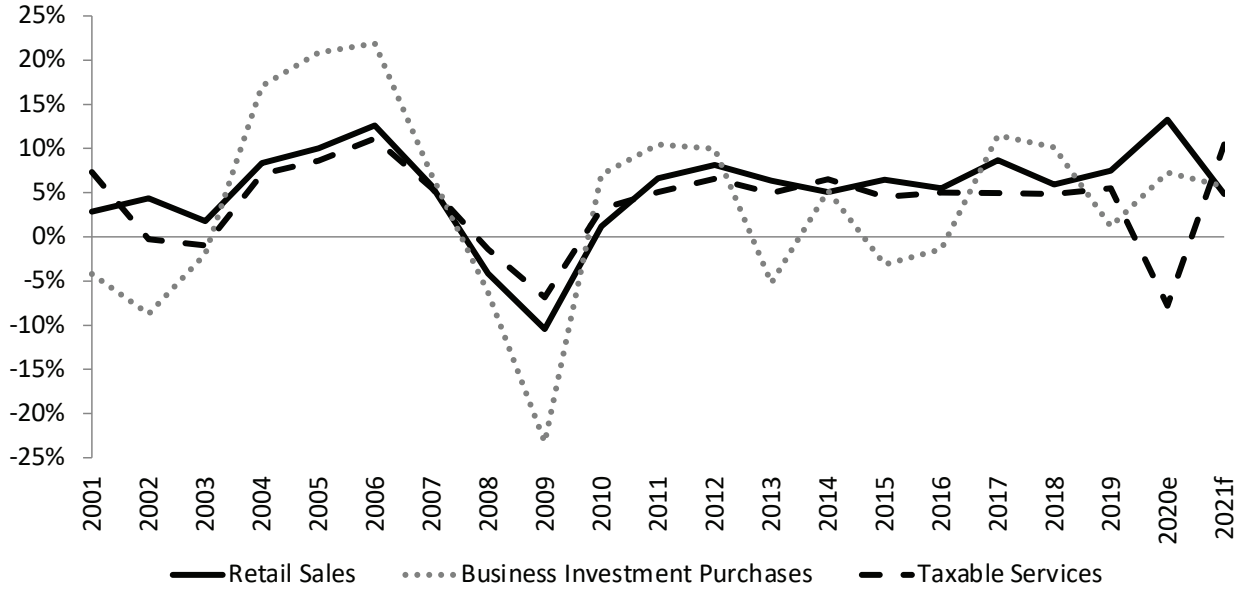
Despite a tumultuous 2020, progress in the fight against COVID-19, a relatively strong labor market, and strong consumer spending is forecasted to drive solid growth in Utah's taxable sales in the coming year. Total taxable sales are forecasted to increase by 6.3% to $77.5 billion in 2021. The potential impact of a vaccine points to the beginning of a recovery for the taxable services sector which is forecasted to increase by 10.5% in 2021. A labor market that is one of the strongest in the nation and continued growth in consumer spending are forecasted to drive another year of growth in retail sales and business investment which are forecasted to increase by 4.9% and 5.7%, respectively.

Although solid growth is forecasted in 2021, significant uncertainty due to the COVID-19 pandemic presents a risk to the forecast. Any changes in the course of the pandemic, such as an acceleration in cases or a setback in the progress for an effective vaccine, has the potential to impact Utah taxable sales by altering the speed of the economic recovery for impacted industries. Other conditions with the potential to impact 2021 taxable sales are also primarily external in nature. These conditions include, but are not limited to, monetary and tax policy decisions, national political climate, commodity prices, and geopolitical instability. Any significant changes in these and other economic or political conditions could result in changes to employment, disposable income, and consumer confidence, which will in turn affect Utah taxable sales.

Summary

In 2020, Utah taxable sales saw another year of solid growth despite a worldwide pandemic and recession. Near-record growth in retail sales and strong growth in business investment more than made up for the decline in taxable services. A labor market which is among the nation's best and strong consumer spending are expected to drive another year of growth in taxable sales in 2021. Absent any changes in the course of the virus, an effective vaccine is expected to lead to the beginning of a recovery in taxable sales for the hardest-hit industries. The overall outlook for 2021 taxable sales is hopeful.

Figure 6.1: Percent Change in Utah Taxable Sales by Component



e = estimate, f = forecast
Source: Utah State Tax Commission

Table 6.1: Utah Taxable Sales by Component

Year	Millions of Dollars					Utah Taxable Sales by Component				
	Retail Sales	Business Investment Purchases	Taxable Services	All Other	Total Taxable Sales	Retail Sales	Business Investment Purchases	Taxable Services	All Other	Total Taxable Sales
2001	$15,664.1	$5,661.3	$9,371.8	$1,780.5	$32,477.6					
2002	16,351.6	5,168.2	9,348.6	1,552.2	32,420.5	4.4	-8.7	-0.2	-12.8	-0.2
2003	16,639.1	5,068.9	9,258.7	1,565.3	32,532.0	1.8	-1.9	-1.0	0.8	0.3
2004	18,028.2	5,934.8	9,918.9	1,529.1	35,411.0	8.3	17.1	7.1	-2.3	8.8
2005	19,833.9	7,171.7	10,774.0	1,632.4	39,412.0	10.0	20.8	8.6	6.8	11.3
2006	22,334.1	8,741.9	11,972.8	1,915.5	44,964.4	12.6	21.9	11.1	17.3	14.1
2007	23,634.2	9,359.4	12,635.3	2,230.7	47,859.6	5.8	7.1	5.5	16.5	6.4
2008	22,656.9	8,767.7	12,459.5	1,944.6	45,828.6	-4.1	-6.3	-1.4	-12.8	-4.2
2009	20,292.1	6,729.3	11,609.5	1,936.2	40,567.1	-10.4	-23.2	-6.8	-0.4	-11.5
2010	20,535.6	7,204.1	11,976.6	1,689.7	41,405.9	1.2	7.1	3.2	-12.7	2.1
2011	21,899.9	7,958.6	12,582.1	1,674.4	44,115.0	6.6	10.5	5.1	-0.9	6.5
2012	23,678.0	8,751.9	13,411.4	1,685.4	47,526.8	8.1	10.0	6.6	0.7	7.7
2013	25,187.6	8,292.4	14,076.6	1,835.6	49,392.2	6.4	-5.3	5.0	8.9	3.9
2014	26,459.1	8,725.8	14,993.6	1,529.9	51,708.4	5.0	5.2	6.5	-16.7	4.7
2015	28,168.6	8,454.4	15,672.7	1,686.2	53,981.9	6.5	-3.1	4.5	10.2	4.4
2016	29,721.2	8,337.3	16,461.2	1,923.0	56,442.7	5.5	-1.4	5.0	14.0	4.6
2017	32,304.5	9,296.2	17,274.2	2,170.5	61,045.4	8.7	11.5	4.9	12.9	8.2
2018	34,219.6	10,236.5	18,115.3	2,392.1	64,963.4	5.9	10.1	4.9	10.2	6.4
2019	36,785.3	10,358.5	19,107.2	2,672.1	68,923.1	7.5	1.2	5.5	11.7	6.1
2020e	41,662.6	11,112.6	17,618.8	2,500.2	72,894.2	13.3	7.3	-7.8	-6.4	5.8
2021f	43,686.0	11,745.0	19,461.0	2,583.0	77,475.0	4.9	5.7	10.5	3.3	6.3

Note: The major components of taxable sales are composed of NAICS categories as follows: Retail Trade Sales: All retail categories in NAICS Codes 44-45; Business Investment Purchases: Agriculture Forestry Fishing & Hunting, Mining Quarrying & Oil & Gas Extraction, Construction, Manufacturing, Wholesale Trade, and Transportation & Warehousing; Taxable Services: Information, Finance & Insurance, Real Estate Rental & Leasing, Professional Scientific & Technical Services, Management of Companies & Enterprises, Administration & Support & Waste Management & Remediation Services, Educational Services, Health Care & Social Assistance, Arts Entertainment & Recreation, Accommodation, Food Services & Drinking Places, Other Services, and Utilities; All Other: composed of all other NAICS categories, as well as Private Motor Vehicle Sales, Special Event Sales, Nonclassifiable Sales, and Prior Period Payments & Refunds.
e = estimate, f = forecast
Source: Utah State Tax Commission

Table 6.2: Utah Taxable Sales by County

County	Millions of Dollars						Percent Change 2018-2019	% of Total 2019
	2014	2015	2016	2017	2018	2019		
Beaver	$105.3	$108.5	$119.9	$99.6	$104.5	$114.8	9.9%	0.2%
Box Elder	566.4	641.0	707.1	769.9	791.1	828.5	4.7%	1.2%
Cache	1,512.7	1,638.4	1,721.6	1,874.9	1,955.0	2,090.9	7.0%	3.0%
Carbon	424.0	391.1	362.4	382.7	411.3	420.1	2.1%	0.6%
Daggett	16.6	18.4	16.5	19.7	21.2	21.6	2.1%	0.0%
Davis	4,554.2	4,902.9	5,132.1	5,483.5	5,703.9	6,028.6	5.7%	8.7%
Duchesne	895.1	442.8	372.9	478.9	531.1	537.2	1.2%	0.8%
Emery	138.9	127.8	136.5	129.1	153.5	154.0	0.3%	0.2%
Garfield	121.1	128.9	139.1	154.1	157.4	168.6	7.1%	0.2%
Grand	390.2	367.7	389.4	424.3	451.0	485.5	7.6%	0.7%
Iron	656.6	724.0	783.8	842.6	921.9	995.4	8.0%	1.4%
Juab	96.9	107.0	108.5	117.0	128.2	142.1	10.8%	0.2%
Kane	165.2	180.9	195.3	216.5	239.9	264.3	10.2%	0.4%
Millard	189.3	168.4	181.5	190.5	195.0	201.9	3.5%	0.3%
Morgan	93.4	104.6	107.0	120.1	122.5	139.9	14.2%	0.2%
Piute	10.0	9.9	9.1	9.6	11.0	14.3	30.6%	0.0%
Rich	19.7	36.1	40.0	47.1	54.3	62.7	15.4%	0.1%
Salt Lake	22,940.8	24,282.4	25,391.5	27,078.0	28,846.0	30,093.2	4.3%	43.7%
San Juan	184.5	150.7	156.3	157.8	189.3	198.5	4.9%	0.3%
Sanpete	228.2	237.9	246.1	272.9	285.3	305.1	7.0%	0.4%
Sevier	377.2	365.9	364.3	391.3	417.4	435.2	4.3%	0.6%
Summit	1,572.3	1,745.2	1,869.9	2,002.2	2,102.3	2,286.9	8.8%	3.3%
Tooele	633.8	702.3	694.2	766.9	799.2	895.3	12.0%	1.3%
Uintah	1,470.2	972.2	728.5	909.5	941.1	895.7	-4.8%	1.3%
Utah	7,557.4	8,151.6	8,670.9	9,565.8	10,164.4	11,242.7	10.6%	16.3%
Wasatch	429.3	476.3	520.8	594.8	667.0	738.4	10.7%	1.1%
Washington	2,732.1	2,971.9	3,245.6	3,611.1	3,946.5	4,204.6	6.5%	6.1%
Wayne	39.8	43.6	47.8	55.1	59.6	63.1	5.9%	0.1%
Weber	3,719.1	3,924.2	4,117.4	4,385.9	4,654.4	4,923.3	5.8%	7.1%
Indeterminate*	-132.0	-140.6	-133.3	-106.1	-61.7	-29.2	-52.6%	-0.0%
State of Utah	51,708.4	53,981.9	56,442.7	61,045.4	64,963.4	68,923.1	6.1%	100.0%

* "Indeterminate" includes taxable sales and refunds where a county nexus could not be determined. These refunds exceeded sales each year, resulting in negative values for net taxable sales where no county was identified.
Source: Utah State Tax Commission

Tax Collections

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Leslee Katayama, Utah State Tax Commission
Jacoba Larsen, Utah State Tax Commission

2020 OVERVIEW

Although Utah fared relatively well in comparison to other states in fiscal year (FY) 2020, tax collections declined 3.9% as events precipitated by the coronavirus pandemic negatively impacted revenues. However, most of the FY 2020 decline was not an actual decrease in revenues but a shift of revenues from FY 2020 into FY 2021 due to an extension of the income tax filing deadline from April 15, 2020 to July 15, 2020. This filing date change pushed approximately $795 million in Education Fund revenues from FY 2020 into FY 2021. After correcting for income tax timing, tax collections would have grown 5.7% in FY 2020, continuing many years of uninterrupted growth.

Unrestricted revenues totaled $7,918.5 million in FY 2020, exceeding the June 2020 forecast (adjusted for legislation) of $7,810.8 million by $107.7 million. Total General Fund revenues rose 7.4%, while Education Fund revenues fell 10.1% due to the income tax filing extension (6.1% growth after adjusting for the filing extension). Transportation Fund and mineral lease revenues decreased 1.0% and 24.3%, respectively.

General Fund

Despite the pandemic, the majority of General Fund revenue sources posted positive growth in FY 2020. Investment income was the exception, declining 12.4% as interest rates dropped to among the lowest ever seen. Unrestricted General Fund revenues totaled $2,829.0 million in FY 2020, an increase of 7.4% compared with 3.7% growth in FY 2019. Unrestricted sales tax revenue grew 7.0% in FY 2020. Total sales tax, including earmarked revenue, increased 9.7% in FY 2020 due to a new 0.15% earmark for Medicaid expansion that took effect at the end of FY 2019 but largely impacted growth in FY 2020. Federal stimulus payments, extended unemployment benefits, pandemic-related stocking up, and new revenue from marketplace facilitators were major factors in boosting sales tax collections. Sales tax earmarks, which have increased steadily since FY 2011 (when they were $189.2 million), totaled $815.0 million in FY 2020, an 18.0% increase over the prior year.

In FY 2020, revenue from beer, cigarette, and tobacco taxes grew 2.3%, liquor profits grew 3.1%, and unrestricted insurance premium tax collections grew 4.1%. FY 2020 mining severance tax revenue rose 7.2% on the heels of a 31.7% increase in FY 2019. Oil and gas severance tax collections rebounded 34.8% in FY 2020 after declining 16.9% in FY 2019.

Education Fund

Education Fund revenues fell 10.1% to $4,415.4 million in FY 2020. Individual income taxes declined 7.7%, and corporate income tax collections fell 31.7% as individual and corporate tax payments were shifted from April 2020 to July 2020.

Were it not for the income tax filing extension, individual income taxes would have grown at a strong 9.3% in FY 2020, and corporate income taxes would have declined just over 20%. Although some of the corporate tax decline may be due to the impacts of the pandemic on corporate profits, much of the decline is the result of one-time repatriation revenues stemming from the federal Tax Cuts and Jobs Act of 2017, which boosted FY 2019 corporate tax revenues.

Transportation Fund

Revenues in the Transportation Fund totaled $614 million in FY 2020, a 1.0% decline compared to FY 2019. Motor fuel tax collections fell 5.5% in FY 2020 as fewer workers commuted to work and more people stayed home. Special fuel tax revenue, however, rose 7.8% in FY 2020. Other Transportation Fund revenue increased 3.4%.

2021 OUTLOOK

Utah tax collections are forecasted to increase 21.6% in FY 2021 (1.4% after correcting for the income tax timing shift). General Fund revenue is expected to increase by 3.4% (3.5% including earmarks). Buoyed by a relatively strong labor market and strong consumer spending, sales taxes are forecasted to rise 5.8%. Total sales tax, including earmarks, is forecasted to grow 5.4%. Transportation Fund revenues are expected to increase 4.1% in FY 2021 as people resume work commutes and travel. Total Education Fund revenues are expected to increase 36.3%, with individual income taxes jumping 39.6% and corporate franchise and income taxes increasing 11.4% as a result of the filing date extension. After correcting for the income tax timing shift, Education Fund revenues are forecasted to increase 0.2% in FY 2021. While solid wage and withholding growth are forecasted in FY 2021, final tax year 2020 income tax payments due in FY 2021 are estimated to be weaker than previous years.

Potential Risks to the Economy

While Utah is relatively well positioned to weather the storm caused by the coronavirus pandemic, there are developments at the national and international level which have the potential to weaken the economic picture. These risks include sharp increases in COVID-19 virus cases prompting individuals to stay home more, political gridlock in Washington, D.C. and failure to enact a second stimulus package, a correction in equities or asset values leading to a decline in business and consumer confidence, fiscal or monetary policy changes such as rising interest rates or tax policy changes, a decline in one or more international economies, political or military conflicts, geopolitical events, and a deterioration of U.S. labor markets.

Legislation and Court Actions

In addition, legislative changes or court decisions have the potential to impact tax collections. Senate Bill 168 in the 2019 General Session required marketplace facilitators that met certain criteria (over $100,000 in gross collections and 200 separate transactions) to collect and remit sales and use tax on each sale the marketplace facilitator makes on its own behalf or that it makes or facilitates on behalf of a marketplace seller beginning October 1, 2019. This boosted sales tax revenues for FY 2020.

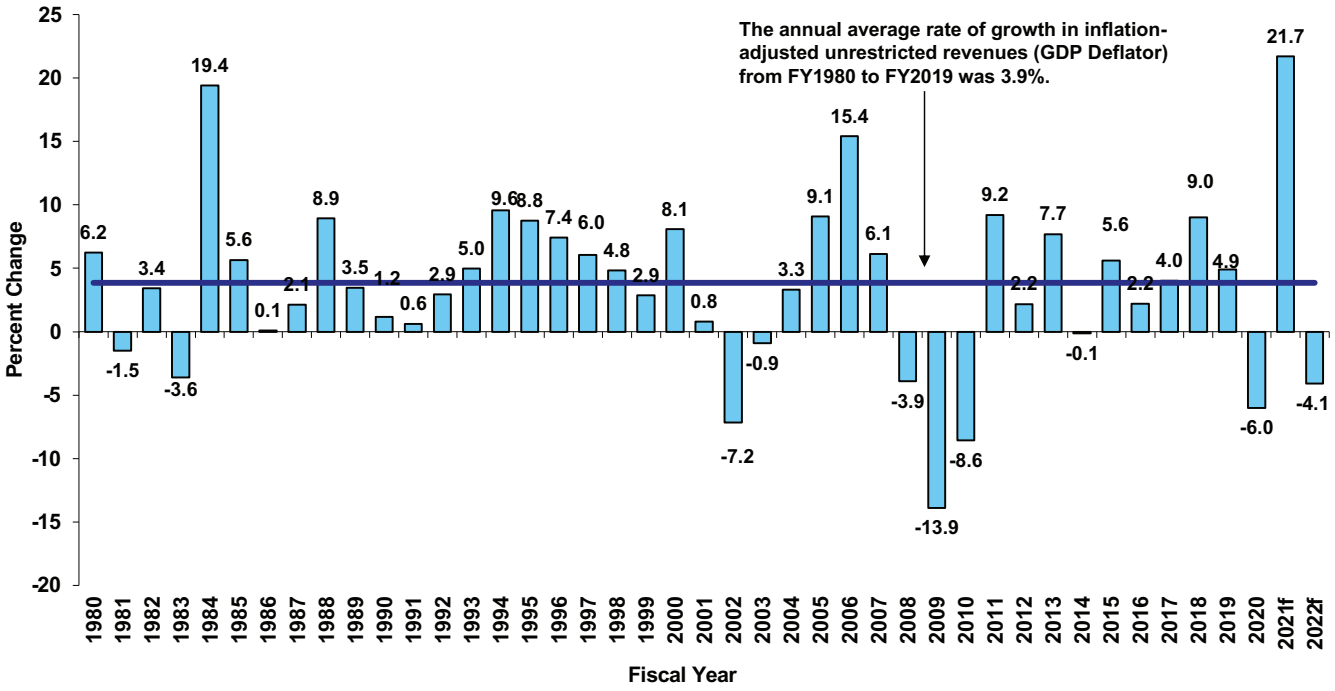
Also, amidst the coronavirus pandemic, the federal government extended the filing deadline for individual income and corporate franchise taxes from April 15, 2020, to July 15, 2020. Utah followed suit, pushing revenues into FY 2021 from FY 2020.

These or other actions have the potential to affect tax collections.

Summary

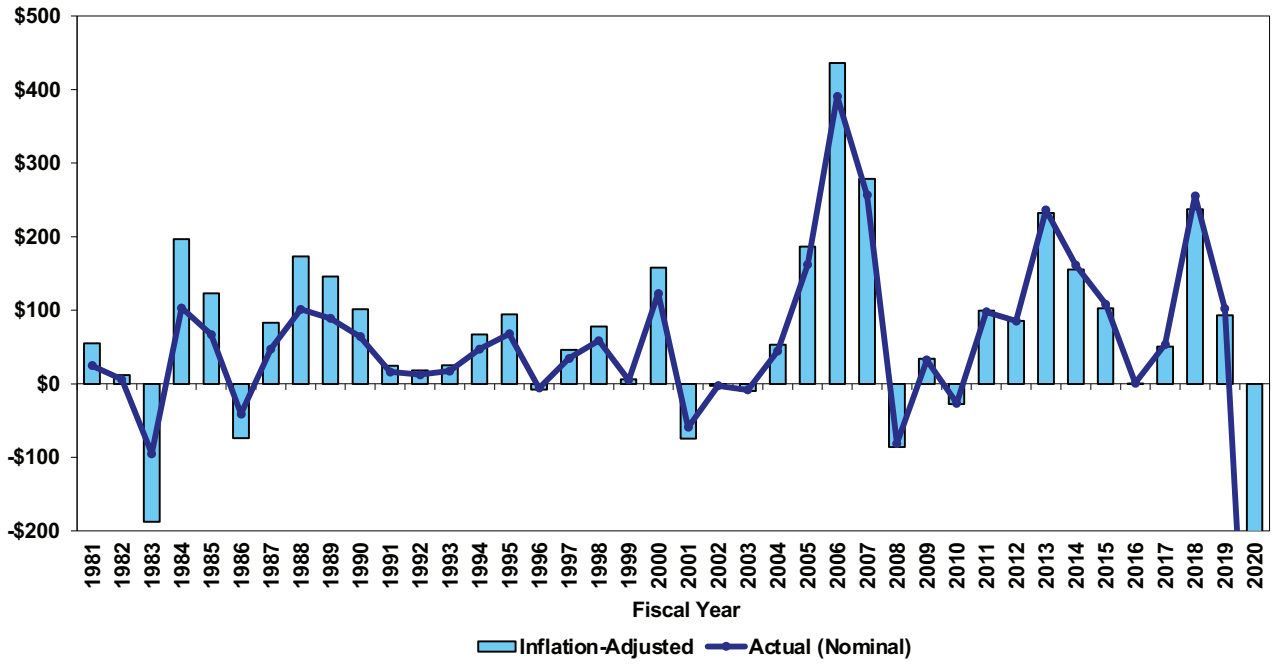
Actual FY 2020 tax collections declined due to the income tax filing extension from April 15 to July 15, which pushed approximately $795 million in Education Fund revenues from FY 2020 into FY 2021. After correcting for income tax timing, Utah tax collections realized a solid 5.7% growth, even in the midst of a worldwide pandemic and recession. While Utah is well positioned for recovery and had a strong economy going into the pandemic, there remains a great deal of uncertainty and risk, particularly since the coronavirus pandemic is largely uncharted territory. We expect total tax collections to increase 21.6% percent in FY 2021. However, much of this is due to the aforementioned tax shift in individual income and corporate franchise taxes.

Figure 7.1: Unrestricted General and Education Fund Revenues
Inflation-Adjusted Annual Percentage Change



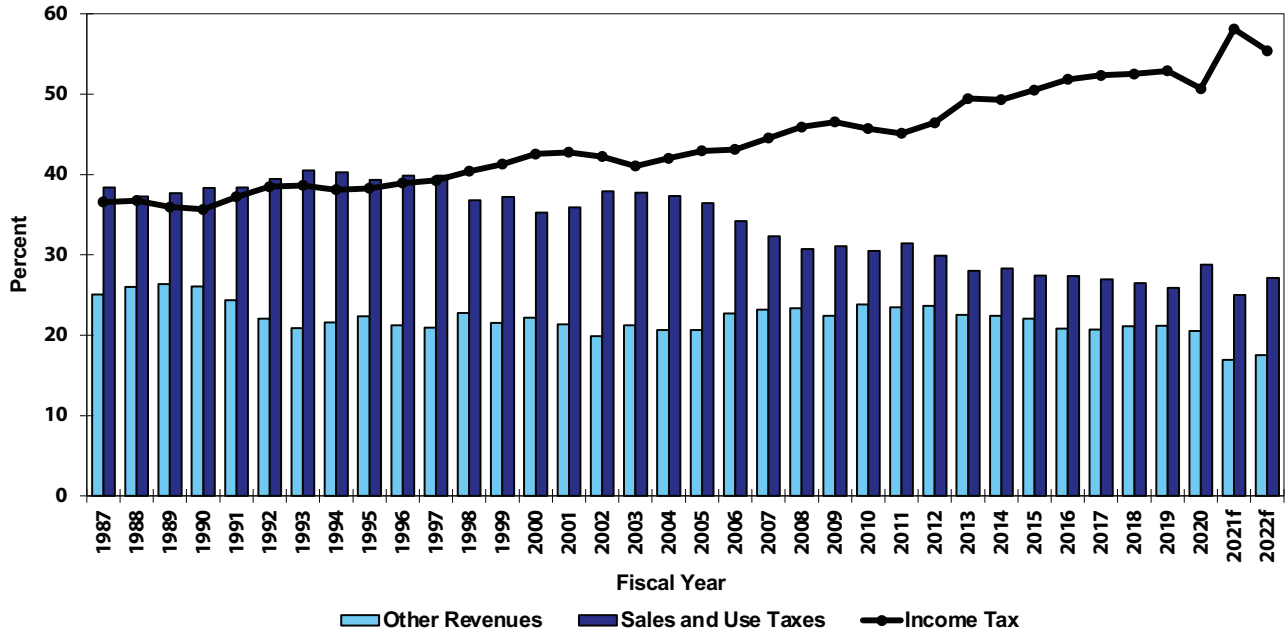
f = forecast
Source: Utah State Tax Commission

Figure 7.2: Actual and Inflation-Adjusted Unrestricted Revenues
Surplus/Deficit for the General and Education Fund (Millions of 2012 Dollars)



Note: Dollars amounts adjusted for inflation from nominal amounts using the GDP implicit price deflator.
Source: Governor's Office of Management and Budget

Figure 7.3: Sales and Use Taxes, Income Tax, and All Other Unrestricted Revenues
Percent of Total State Unrestricted Revenues



Note: Total State Unrestricted Revenues includes General Fund, Education Fund, and Transportation Fund revenues. Mineral lease revenues are not included.
The "Other" category includes all other revenue sources in those funds except for Sales and Use and Income tax.
f = forecast
Source: Utah State Tax Commission and Governor's Office of Management and Budget

Table 7.1: Fiscal Year Revenue Collections
(Millions of Current Dollars)

Revenue Source	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021f	2022f
Sales and Use Tax	$1,634.5	$1,806.3	$1,857.8	$1,739.4	$1,547.5	$1,402.7	$1,601.4	$1,582.5	$1,615.9	$1,656.8	$1,715.0	$1,778.5	1,856.8	2018.7	2116.3	2,265.3	2,397.6	2,543.6
Earmarked Sales and Use Tax	42.0	100.2	250.0	325.3	276.3	301.0	189.2	332.1	422.1	452.5	495.8	543.1	585.4	643.5	690.6	815.0	847.7	891.4
Total Sales and Use Tax	1,676.5	1,906.4	2,107.8	2,064.7	1,823.8	1,703.7	1,790.6	1,914.6	2,038.0	2,109.3	2,210.7	2,321.6	2,442.1	2,662.3	2,806.9	3,080.3	3,245.4	3,434.9
Cable/Satellite Excise Tax	11.7	20.5	20.8	24.1	24.8	25.3	25.4	28.7	26.9	26.0	28.4	28.6	31.3	29.3	28.2	28.4	28.1	28.0
Liquor Profits	38.1	47.3	53.2	59.7	59.7	58.4	62.3	70.8	81.4	87.8	95.4	104.0	106.3	112.3	118.1	121.7	123.6	130.9
Insurance Premiums	67.4	71.4	71.8	77.2	83.0	80.0	75.9	84.4	89.6	91.2	92.4	111.7	122.0	133.6	136.6	142.2	148.1	155.5
Beer, Cigarette, and Tobacco	61.9	60.8	62.4	62.8	60.6	58.7	125.5	125.4	120.9	113.1	115.9	118.3	116.3	112.1	106.0	108.5	106.7	105.4
Oil and Gas Severance Tax	53.5	71.5	65.4	65.5	71.0	56.2	59.9	65.5	53.2	89.2	69.7	20.8	9.3	17.4	14.5	19.5	10.8	12.7
Mining Severance Tax	11.4	17.0	23.6	26.5	14.6	20.9	27.1	25.4	16.9	15.9	16.3	7.0	6.8	7.6	10.0	10.8	9.1	10.7
Inheritance Tax	3.0	7.4	0.5	0.1	0.3	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Investment Income	13.6	40.0	83.5	62.8	25.1	5.3	2.4	5.6	6.0	5.0	6.6	7.9	14.3	22.2	34.8	30.5	14.0	12.9
General Fund Other	46.4	50.8	58.0	53.4	54.4	80.3	72.3	95.9	80.4	81.8	90.9	69.8	83.8	91.4	75.4	108.0	92.7	93.6
Property and Energy Credit	-5.9	-5.6	-6.2	-6.4	-6.2	-6.4	-6.0	-6.8	-6.3	-6.0	-5.4	-6.0	-5.6	-5.6	-5.8	-5.9	-6.0	-6.0
General Fund Total	1,935.4	2,187.5	2,290.9	2,165.1	1,934.6	1,781.4	2,046.3	2,077.5	2,084.9	2,160.8	2,225.2	2,240.7	2,341.3	2,539.1	2,634.2	2,829.0	2,924.7	3,087.5
GF & Earmarks Total	1,977.4	2,287.6	2,540.9	2,490.4	2,210.9	2,082.4	2,235.4	2,409.6	2,507.0	2,613.3	2,721.0	2,783.8	2,926.7	3,182.6	3,324.8	3,644.0	3,772.4	3,978.9
Individual Income Tax	1,926.6	2,277.6	2,561.4	2,598.8	2,319.6	2,104.6	2,298.2	2,459.4	2,852.0	2,889.8	3,157.7	3,370.3	3,609.5	3,999.0	4,320.0	3,985.4	5,562.1	5,193.9
Corporate Taxes	204.2	366.6	414.1	405.1	255.4	258.4	260.7	268.9	338.2	313.5	373.9	338.3	328.5	447.9	520.9	355.9	396.4	371.4
Mineral Production Withholding	16.7	22.7	23.1	23.8	32.5	24.6	26.7	28.3	26.1	32.4	27.1	15.6	15.1	21.6	28.8	26.0	22.2	22.8
Education Fund Other	0.0	9.8	18.2	20.1	19.3	24.6	26.6	25.2	27.8	23.2	21.5	25.4	27.1	30.9	39.0	48.0	35.4	30.1
Education Fund Total	2,147.6	2,676.8	3,016.8	3,047.8	2,626.8	2,412.2	2,612.2	2,781.9	3,244.1	3,258.9	3,580.2	3,749.6	3,980.1	4,499.4	4,908.7	4,415.4	6,016.2	5,618.2
GF/EF Total	4,083.0	4,864.2	5,307.7	5,212.9	4,561.4	4,193.6	4,658.5	4,859.3	5,329.0	5,419.7	5,805.4	5,990.3	6,321.4	7,038.5	7,543.0	7,244.4	8,940.8	8,705.7
GF/EF & Earmarks Total	4,125.0	4,964.4	5,557.7	5,538.2	4,837.7	4,494.6	4,847.7	5,191.4	5,751.1	5,872.2	6,301.2	6,533.4	6,906.8	7,682.1	8,233.6	8,059.4	9,788.6	9,597.0
Motor Fuel Tax	241.5	240.4	254.7	250.7	235.5	243.3	252.5	253.0	256.9	256.8	261.7	305.2	348.8	354.0	371.6	351.0	367.9	387.0
Special Fuel Tax	93.8	101.1	111.1	113.0	101.2	94.4	102.2	104.1	101.4	101.7	100.1	115.5	134.9	134.9	142.3	153.4	159.6	164.3
Other	70.0	76.6	78.8	82.4	85.4	73.6	80.7	79.2	81.2	82.0	85.1	89.7	89.8	95.5	106.0	109.6	112.0	116.6
Transportation Fund Total	405.3	418.1	444.6	446.0	422.1	411.4	435.4	436.2	439.4	440.5	446.9	510.5	573.5	584.4	619.9	614.0	639.5	667.8
Mineral Lease Payments	92.0	170.0	160.9	150.3	189.1	147.2	152.8	194.0	136.9	167.6	141.7	71.4	75.3	78.8	79.5	60.2	47.0	50.4
TOTAL	4,580.3	5,452.4	5,913.2	5,809.2	5,172.7	4,752.2	5,246.7	5,489.5	5,905.3	6,027.8	6,394.1	6,572.2	6,970.2	7,701.8	8,242.4	7,918.5	9,627.3	9,423.9
TOTAL & Earmarks	4,622.3	5,552.6	6,163.2	6,134.6	5,449.0	5,053.2	5,435.9	5,821.6	6,327.4	6,480.3	6,889.8	7,115.3	7,555.6	8,345.3	8,933.0	8,733.5	10,475.0	10,315.3

Note: GF = General Fund; EF = Education Fund; f = forecast
Source: Utah State Tax Commission & Governor's Office of Management and Budget

Table 7.2: Fiscal Year Revenue Collections
(Annual Percent Change)

Revenue Source	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021f	2022f
Sales and Use Tax	10.5%	2.9%	-6.4%	-11.0%	-9.4%	14.2%	-1.2%	2.1%	2.5%	3.5%	3.7%	4.4%	8.7%	4.8%	7.0%	5.8%	6.1%
Earmarked Sales and Use Tax	138.5%	149.6%	30.1%	-15.1%	8.9%	-37.2%	75.6%	27.1%	7.2%	9.6%	9.5%	7.8%	9.9%	7.3%	18.0%	4.0%	5.1%
Total Sales and Use Tax	13.7%	10.6%	-2.0%	-11.7%	-6.6%	5.1%	6.9%	6.4%	3.5%	4.8%	5.0%	5.2%	9.0%	5.4%	9.7%	5.4%	5.8%
Cable/Satellite Excise Tax	75.8%	1.7%	15.5%	3.0%	2.0%	0.3%	13.0%	-6.1%	-3.5%	9.5%	0.6%	9.4%	-6.3%	-3.7%	0.5%	-1.1%	-0.2%
Liquor Profits	24.2%	12.5%	12.2%	-0.0%	-2.2%	6.8%	13.6%	14.9%	7.9%	8.7%	9.0%	2.2%	5.6%	5.2%	3.1%	1.6%	5.9%
Insurance Premiums	6.0%	0.5%	7.6%	7.5%	-3.6%	-5.2%	11.2%	6.1%	1.8%	1.3%	20.9%	9.3%	9.5%	2.3%	4.1%	4.2%	5.0%
Beer, Cigarette, and Tobacco	-1.8%	2.6%	0.7%	-3.6%	-3.1%	113.8%	-0.1%	-3.6%	-6.4%	2.5%	2.1%	-1.7%	-3.5%	-5.4%	2.3%	-1.7%	-1.2%
Oil and Gas Severance Tax	33.7%	-8.5%	0.1%	8.4%	-20.8%	6.5%	9.5%	-18.9%	67.7%	-21.8%	-70.2%	-55.2%	87.4%	-16.9%	34.8%	-44.6%	17.4%
Mining Severance Tax	48.9%	38.5%	12.5%	-45.1%	43.2%	30.0%	-6.3%	-33.3%	-6.4%	3.1%	-57.3%	-1.9%	11.3%	31.7%	7.2%	-15.8%	18.3%
Inheritance Tax	152.3%	-93.3%	-80.9%	236.7%	-81.1%	113.8%											
Investment Income	194.1%	108.7%	-24.8%	-60.1%	-78.8%	-55.0%	135.2%	6.8%	-16.3%	30.4%	21.0%	80.3%	55.0%	56.9%	-12.4%	-54.1%	-7.4%
General Fund Other	9.5%	14.3%	-8.0%	1.8%	47.6%	-9.9%	32.7%	-16.1%	1.7%	11.1%	-23.2%	20.0%	9.1%	-17.5%	43.2%	-14.2%	1.0%
Property and Energy Credit	-5.7%	9.9%	3.8%	-2.6%	2.4%	-6.4%	13.8%	-7.7%	-5.0%	-9.2%	10.2%	-6.4%	0.9%	3.1%	0.8%	1.9%	0.0%
General Fund Total	13.0%	4.7%	-5.5%	-10.6%	-7.9%	14.9%	1.5%	0.4%	3.6%	3.0%	0.7%	4.5%	8.4%	3.7%	7.4%	3.4%	5.6%
GF & Earmarks Total	15.7%	11.1%	-2.0%	-11.2%	-5.8%	7.3%	7.8%	4.0%	4.2%	4.1%	2.3%	5.1%	8.7%	4.5%	9.6%	3.5%	5.5%
Individual Income Tax	18.2%	12.5%	1.5%	-10.7%	-9.3%	9.2%	7.0%	16.0%	1.3%	9.3%	6.7%	7.1%	10.8%	8.0%	-7.7%	39.6%	-6.6%
Corporate Taxes	79.6%	13.0%	-2.2%	-36.9%	1.2%	0.9%	3.1%	25.8%	-7.3%	19.3%	-9.5%	-2.9%	36.4%	16.3%	-31.7%	11.4%	-6.3%
Mineral Production Withholding	35.8%	1.4%	3.4%	36.3%	-24.4%	8.7%	6.2%	-8.0%	24.1%	-16.1%	-42.6%	-3.0%	42.7%	33.3%	-9.5%	-14.7%	2.6%
Education Fund Other	23,989.4%	85.9%	10.4%	-3.8%	27.4%	8.1%	-5.4%	10.4%	-16.6%	-7.4%	18.0%	6.8%	14.2%	26.2%	23.1%	-26.3%	-15.0%
Education Fund Total	24.6%	12.7%	1.0%	-13.8%	-8.2%	8.3%	6.5%	16.6%	0.5%	9.9%	4.7%	6.1%	13.0%	9.1%	-10.1%	36.3%	-6.6%
GF/EF Total	19.1%	9.1%	-1.8%	-12.5%	-8.1%	11.1%	4.3%	9.7%	1.7%	7.1%	3.2%	5.5%	11.3%	7.2%	-4.0%	23.4%	-2.6%
GF/EF & Earmarks Total	20.3%	12.0%	-0.4%	-12.6%	-7.1%	7.9%	7.1%	10.8%	2.1%	7.3%	3.7%	5.7%	11.2%	7.2%	-2.1%	21.5%	-2.0%
Motor Fuel Tax	-0.4%	5.9%	-1.6%	-6.1%	3.3%	3.8%	0.2%	1.5%	-0.0%	1.9%	16.6%	14.3%	1.5%	5.0%	-5.5%	4.8%	5.2%
Special Fuel Tax	7.7%	9.9%	1.7%	-10.4%	-6.7%	8.2%	1.9%	-2.6%	0.3%	-1.6%	15.4%	16.8%	-0.0%	5.5%	7.8%	4.0%	3.0%
Other	9.5%	2.8%	4.6%	3.7%	-13.8%	9.6%	-1.9%	2.5%	1.1%	3.7%	5.4%	0.1%	6.4%	10.9%	3.4%	2.2%	4.1%
Transportation Fund Total	3.2%	6.3%	0.3%	-5.4%	-2.5%	5.8%	0.2%	0.7%	0.3%	1.5%	14.2%	12.3%	1.9%	6.1%	-1.0%	4.1%	4.4%
Mineral Lease Payments	84.8%	-5.4%	-6.5%	25.8%	-22.2%	3.8%	27.0%	-29.4%	22.4%	-15.4%	-49.6%	5.4%	4.7%	0.8%	-24.3%	-21.8%	7.2%
TOTAL	19.0%	8.5%	-1.8%	-11.0%	-8.1%	10.4%	4.6%	7.6%	2.1%	6.1%	2.8%	6.1%	10.5%	7.0%	-3.9%	21.6%	-2.1%
TOTAL & Earmarks	20.1%	11.0%	-0.5%	-11.2%	-7.3%	7.6%	7.1%	8.7%	2.4%	6.3%	3.3%	6.2%	10.5%	7.0%	-2.2%	19.9%	-1.5%

Note: GF = General Fund; EF = Education Fund; f = forecast
Source: Utah State Tax Commission and Governor's Office of Management and Budget

Exports

8

John Gilbert, Utah State University
Jace Jones, Utah State University
Thomas Martineau, Utah State University
Amanda Ortega, Utah State University

2019 OVERVIEW

Utah's total merchandise export value continued the upward trend we have seen since 2017. Total export value in 2019 grew by 20.5% over 2018, to a total of $17.3 billion dollars. In doing so, Utah bucked the overall trend in US merchandise exports, which were down in 2019 by 1.4% over 2018. In fact, Utah's export growth rate was the second highest in the nation, behind only New Mexico, and Utah was one of only a handful of states to achieve double digit growth in 2019. As might be expected then, relative to the export performance of other states, Utah made significant gains, rising from 27th in 2018 (29th in 2017) to become the 25th largest exporting state in the nation in terms of overall merchandise export value.

The Salt Lake City Metropolitan area continues to comprise the majority of exports in Utah, generating 75.6% of the state's exports. This dominance was extended in 2019. In value terms, Salt Lake City Metropolitan area exports totaled $13.3 billion dollars, representing growth of 37.1% from 2018's total of $9.7 billion. By contrast, exports from the Provo area were stagnant, with in 2019's export value roughly matching 2018's total at just under $1.8 billion dollars. Given the strong growth Salt Lake City's exports, the Provo region's share of state exports dropped to 10.3%. Similarly, the Ogden area saw a 4.4% decrease in exports from $1.8 billion dollars down to $1.7 billion dollars (approximately 9.9% of the Utah total). The Logan area did see modest growth in exports, from $573 million dollars in 2018 to $592 million dollars in 2019 (an increase of 3.4%, and 3.4% of Utah's total exports).

Turning to the industrial composition of Utah's exports, as expected primary metals remains Utah's single largest export category by a very large margin, with a total export value in 2019 of $9.1 billion. This represents an increase of 41.8% over 2018, and a continuation of the growth of the year before. Primary metals currently comprise 52.5% of Utah's exports, and growth in this sector accounts for the majority of Utah's total export growth in 2019, an increase in the state's export reliance on this sector from 2018. Other significant export sectors in 2019 include computers and electronics ($1.5 billion, 8.5% of total exports), chemicals ($1.3 billion, 7.5% of total exports), transportation equipment ($1.1 billion, 6.1%), and food products ($975 million, 5.6% of total exports).

2019 saw a 5.6% decline in exports of computers and electronics (an $87 million decrease). Exports of chemicals increased by 5.1% ($62.7 million). Transportation equipment grew to become third largest export sector, a rank held by food products in 2018. Exports of petroleum and coal products increased by over 40% ($2 million) in 2019, while exports of oil and gas by contrast dropped by nearly 60% ($2.9 million). Other notable changes in 2019 include an increase of 34.3% ($39.7 million) in agricultural product exports and a 47.6% ($7 million) rise in apparel exports.

The United Kingdom remains the largest consumer of Utah's exports, with 2019 export values at $8.8 billion, making up 50.5% of Utah's total exports. In second place is Canada with 2019 export values at $1.4 billion, making up only 8% of Utah's total exports. Japan comes third with $839 million and 4.8% of the total. Mexico follows closely behind Japan with $762 million and 4.4% of the total, with Taiwan next with $639.5 million (3.7% of the total).

The regional pattern of exports exhibited significant changes relative to 2018. There was substantial growth in exports from Utah to the United Kingdom, up from $5.1 billion to $8.8 billion in 2019, a rise of 71%. The vast majority of this increase was in primary metals. Exports to Switzerland grew from $165 million to $402.9 million, a rise of 144.2%, moving from being Utah's 15th largest export market to 9th. Exports to Jordan grew from $1.5 million in 2018 to $50.2 million in

2019, but this does not represent a new market development opportunity. Rather, the detailed Census data indicates that it represents the export of donated articles for relief operations. By contrast, there was a dramatic decline in exports from Utah to Hong Kong (down 80.4%), which dropped from being Utah's 4th largest export market to 15th. Exports to China, Utah's 6th largest export market and one of its most important for agricultural products, were essentially static, after falling dramatically last year.

2020 OUTLOOK

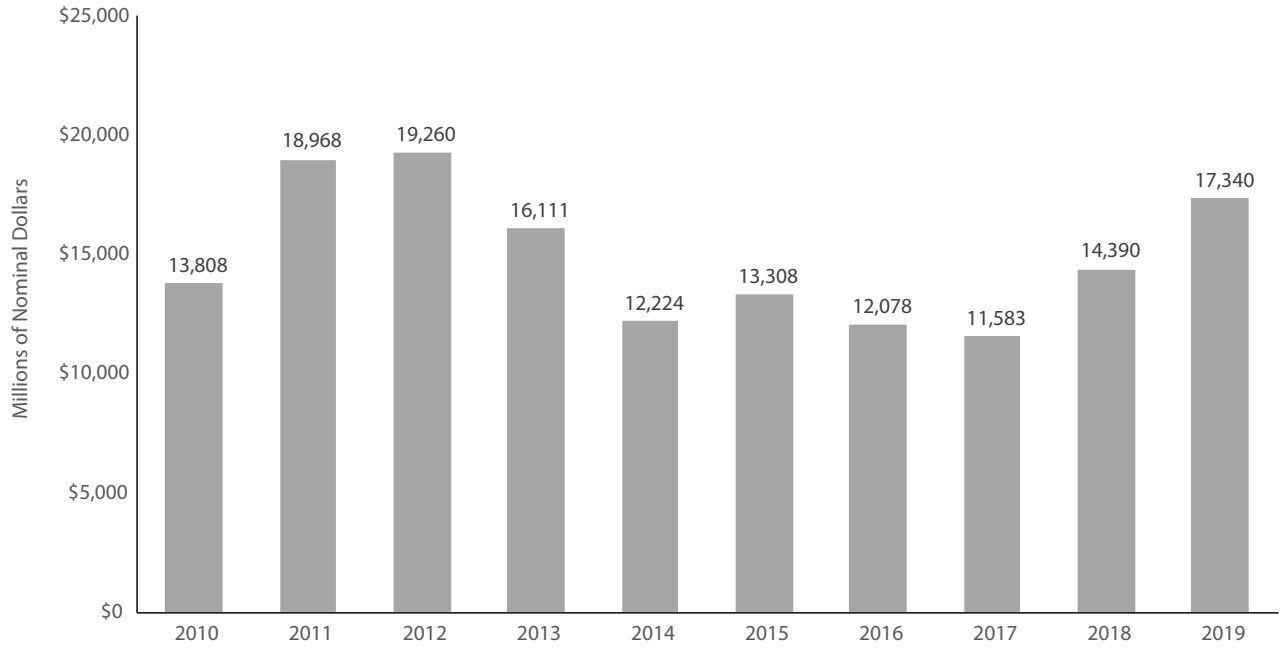
As we noted in last year's report, Utah has benefited greatly from international trade and open markets in terms of job creation over the last decade, and the current anti-trade sentiment the US puts those gains in jeopardy.

The recent US trend, exemplified by the withdrawal from the Trans-Pacific Partnership and on-going trade disputes with China, Canada and the EU is an exception to global trends, an exception with serious consequences for the US, global and Utah economies. The US, traditionally a leader in the push for more open trade, has been left largely on the sidelines as China and Europe have greatly expanded their influence. This represents both an opportunity lost and a challenge for the US to regain its former authority.

The ongoing trade dispute with China remains particularly problematic. Utah's exports to China and Hong Kong (much of which is ultimately directed to the mainland) have fallen by nearly 70% since 2017, a loss of $1.6 billion in export value over that period. This is particularly concerning given that China has been a high growth export market, and also one to which Utah's exports have been relatively diverse along the sectoral dimension. The damage to Utah's agricultural exports has been substantial.

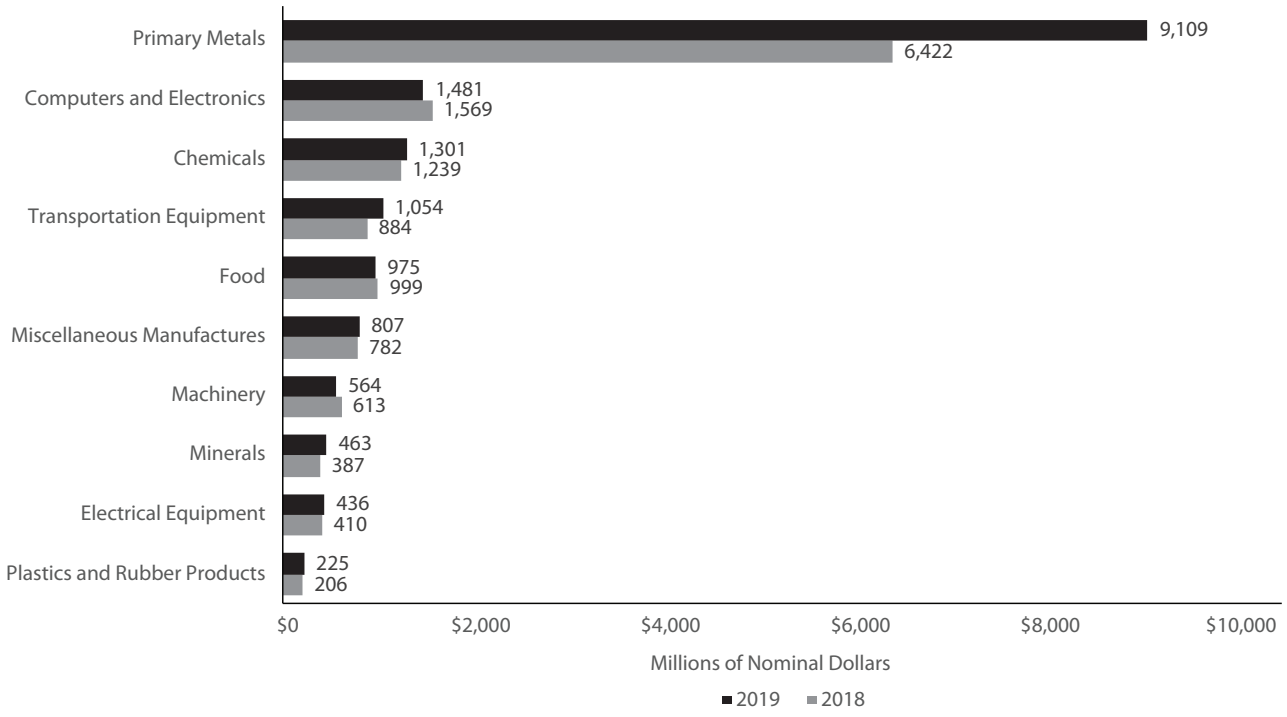
COVID-19 has exacerbated an already precarious position. We don't yet know the full impact the pandemic will have on trade, but it may be substantial. The WTO has projected that global trade will decline by up to 32% as a result of COVID-19, and early US figures are not encouraging. US merchandise exports, already down in 2019 due to rising trade tensions, fell 10% for the first 4 months of 2020, and 30% in April (year on year). The early Utah figures suggest that it has so far managed to avoid such a dramatic downturn (like in many other measures), in large part because of its heavy reliance on primary metal exports, which are somewhat countercyclical, but significant uncertainty remains.

Figure 8.1: Utah Merchandise Exports



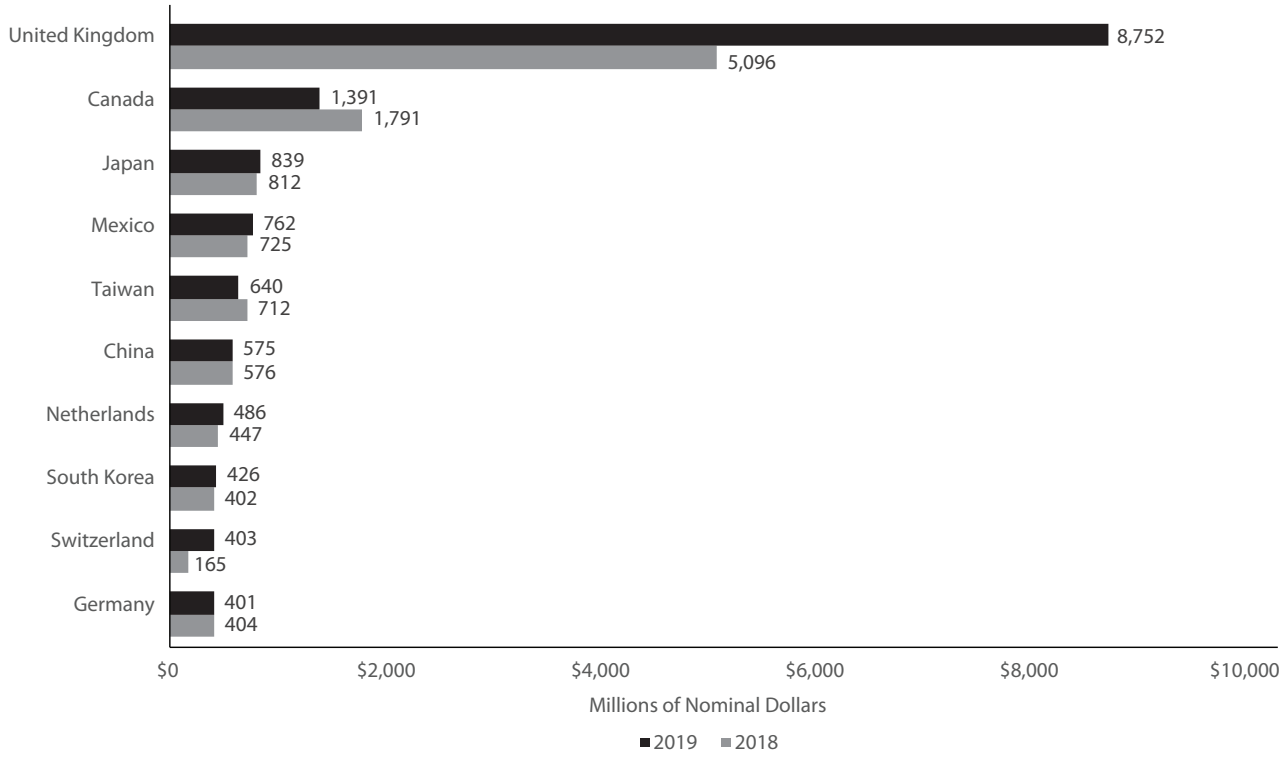
Source: U.S. Census Bureau, USA Trade Online

Figure 8.2: Utah Merchandise Exports of Top Ten Export Industries



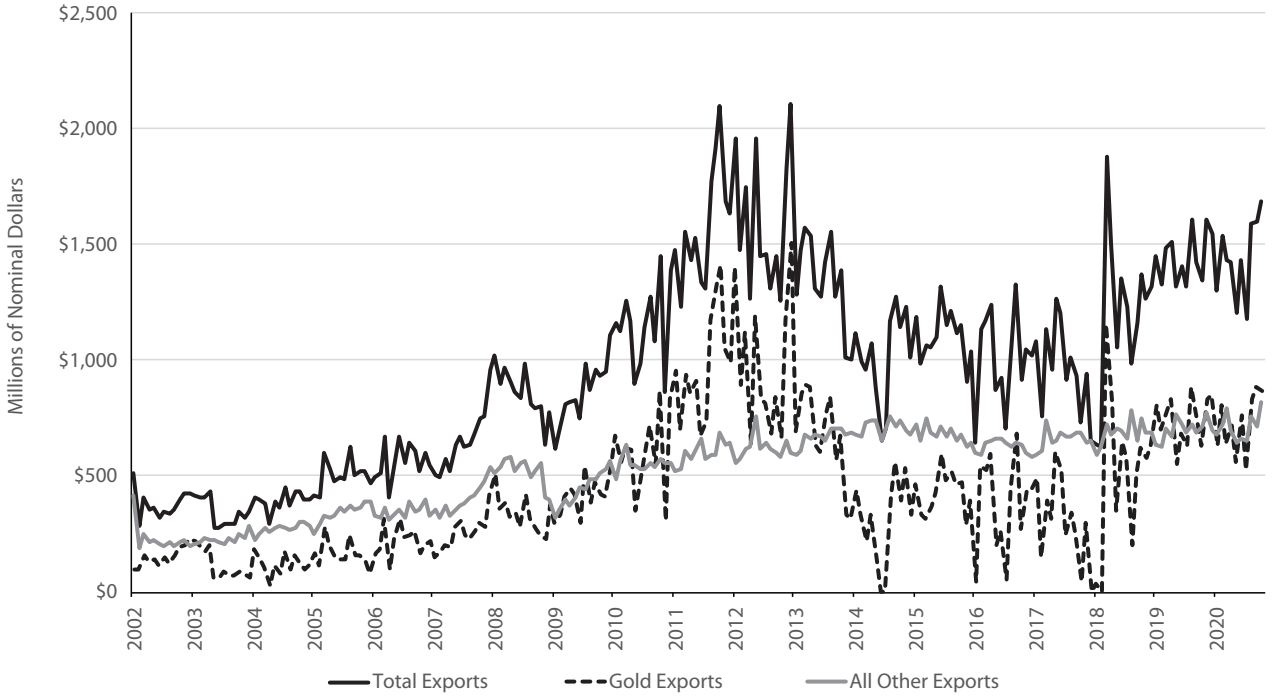
Source: U.S. Census Bureau, USA Trade Online

Figure 8.3: Utah Merchandise Exports to Top Ten Purchasing Countries



Source: U.S. Census Bureau, USA Trade Online

Figure 8.4: Utah Monthly Exports: With and Without Gold



Source: U.S. Census Bureau, USA Trade Online

Table 8.1: U.S. Merchandise Exports by State

Rank	Geography	Millions of Current Dollars						Percent Change 2018–2019	2019 Share
		2014	2015	2016	2017	2018	2019		
	United States	$1,621,874	$1,503,101	$1,451,011	$1,546,273	$1,665,992	$1,643,160	-1.4%	100%
23	Alabama	19,450.4	19,328.2	20,422.1	21,786.3	21,416.7	20,799.8	-2.9%	1.3%
40	Alaska	5,111.2	4,619.7	4,347.5	4,942.5	4,840.5	4,990.1	3.1%	0.3%
19	Arizona	21,247.3	22,655.4	22,016.2	20,916.9	22,508.7	24,669.0	9.6%	1.5%
36	Arkansas	6,866.2	5,869.5	5,707.5	6,234.4	6,447.0	6,231.6	-3.3%	0.4%
2	California	173,868.6	165,379.6	163,512.8	172,012.4	178,181.1	174,026.0	-2.3%	10.6%
33	Colorado	8,363.7	7,950.3	7,580.3	8,054.1	8,328.8	8,097.3	-2.8%	0.5%
26	Connecticut	15,962.8	15,242.4	14,394.2	14,783.7	17,403.4	16,242.5	-6.7%	1.0%
42	Delaware	5,267.4	5,407.8	4,532.4	4,565.6	4,713.6	4,407.2	-6.5%	0.3%
43	Dist of Columbia	940.2	1,088.1	1,330.7	1,483.1	2,724.6	3,690.0	35.4%	0.2%
7	Florida	58,438.8	53,899.6	52,049.4	54,914.3	57,236.6	55,995.4	-2.2%	3.4%
12	Georgia	39,412.7	38,595.3	35,644.3	37,223.8	40,613.3	41,252.4	1.6%	2.5%
51	Hawaii	1,447.5	1,896.4	795.5	952.4	659.8	453.8	-31.2%	0.0%
44	Idaho	5,137.8	4,294.8	4,876.8	3,864.1	4,021.7	3,433.9	-14.6%	0.2%
6	Illinois	68,394.0	63,401.9	59,757.9	65,187.0	65,491.4	59,723.5	-8.8%	3.6%
13	Indiana	35,589.1	33,818.8	34,655.0	37,737.1	39,330.3	39,282.7	-0.1%	2.4%
28	Iowa	15,111.5	13,233.6	12,115.4	13,399.0	14,377.1	13,221.3	-8.0%	0.8%
31	Kansas	12,021.9	10,690.2	10,181.4	11,243.5	11,586.7	11,658.5	0.6%	0.7%
16	Kentucky	27,757.4	27,643.9	29,199.2	30,857.3	31,809.8	32,991.4	3.7%	2.0%
4	Louisiana	64,770.1	48,685.9	48,418.8	57,005.3	67,297.1	63,700.0	-5.3%	3.9%
46	Maine	2,811.1	2,763.0	2,875.3	2,711.9	2,836.6	2,723.7	-4.0%	0.2%
29	Maryland	12,228.3	10,051.8	9,658.2	9,317.5	12,102.3	13,054.6	7.9%	0.8%
18	Massachusetts	27,384.2	25,290.1	25,891.7	27,565.8	27,158.0	26,130.4	-3.8%	1.6%
8	Michigan	57,573.1	53,954.0	54,713.5	59,870.4	58,034.8	55,802.1	-3.8%	3.4%
21	Minnesota	21,397.6	20,016.2	19,202.4	20,691.9	22,677.0	22,188.2	-2.2%	1.4%
30	Mississippi	11,484.9	10,848.4	10,494.7	10,994.6	11,630.2	11,859.3	2.0%	0.7%
27	Missouri	14,189.6	13,647.8	13,934.6	14,206.2	14,530.5	13,405.7	-7.7%	0.8%
48	Montana	1,544.9	1,404.1	1,360.1	1,616.0	1,666.4	1,684.8	1.1%	0.1%
34	Nebraska	7,889.7	6,663.4	6,380.4	7,206.4	7,952.2	7,453.4	-6.3%	0.5%
32	Nevada	7,691.7	8,666.5	9,763.2	12,162.5	11,094.3	8,976.1	-19.1%	0.5%
39	New Hampshire	4,233.2	4,001.3	4,143.0	5,147.9	5,306.1	5,828.6	9.8%	0.4%
14	New Jersey	36,587.0	32,063.6	31,222.8	34,486.3	35,354.2	35,674.9	0.9%	2.2%
41	New Mexico	3,801.6	3,781.3	3,631.6	3,609.6	3,656.8	4,679.2	28.0%	0.3%
3	New York	88,834.3	83,134.5	76,720.2	77,914.6	84,683.2	75,653.3	-10.7%	4.6%
15	North Carolina	31,420.0	30,201.8	30,161.3	32,622.5	32,761.5	34,335.9	4.8%	2.1%
35	North Dakota	5,513.1	4,026.8	5,313.3	5,835.5	7,894.1	6,977.0	-11.6%	0.4%
9	Ohio	52,641.4	51,156.6	49,298.8	50,102.8	54,403.8	53,229.3	-2.2%	3.2%
37	Oklahoma	6,308.3	5,250.7	5,047.9	5,364.4	6,108.4	6,142.6	0.6%	0.4%
20	Oregon	20,888.8	20,085.7	21,752.6	21,895.2	22,334.8	23,599.2	5.7%	1.4%
10	Pennsylvania	40,410.8	39,437.3	36,484.4	38,701.9	41,192.6	42,722.4	3.7%	2.6%
47	Rhode Island	2,388.5	2,132.7	2,277.8	2,391.7	2,406.6	2,675.4	11.2%	0.2%
11	South Carolina	29,773.0	30,988.7	31,321.9	32,199.1	34,628.6	41,462.4	19.7%	2.5%
50	South Dakota	1,577.6	1,420.0	1,223.4	1,359.7	1,436.7	1,357.0	-5.5%	0.1%
17	Tennessee	33,250.9	32,587.8	31,432.7	33,246.1	32,710.5	31,076.4	-5.0%	1.9%
1	Texas	285,559.3	248,605.7	231,106.7	264,541.4	315,938.5	328,864.0	4.1%	20.0%
25	Utah	12,224.1	13,308.4	12,077.7	11,583.3	14,388.7	17,339.5	20.5%	1.1%
45	Vermont	3,669.6	3,181.5	2,989.8	2,776.0	2,920.0	3,021.4	3.5%	0.2%
24	Virginia	19,390.8	17,801.3	16,313.2	16,508.6	18,352.9	17,842.9	-2.8%	1.1%
5	Washington	90,558.3	86,378.7	79,559.5	76,413.7	77,968.2	60,309.7	-22.6%	3.7%
38	West Virginia	7,597.0	5,833.1	5,045.4	7,110.5	8,216.9	5,936.6	-27.8%	0.4%
22	Wisconsin	23,425.6	22,438.3	21,021.2	22,306.1	22,721.3	21,668.5	-4.6%	1.3%
49	Wyoming	1,757.3	1,175.0	1,098.1	1,196.4	1,356.9	1,366.7	0.7%	0.1%

Source: U.S. Census Bureau, USA Trade Online

Table 8.2: Utah Merchandise Exports by Industry

Rank	Code	Industry Name	Millions of Current Dollars						Percent Change 2018–2019	2019 Share
			2014	2015	2016	2017	2018	2019		
		All Commodities	$12,224.1	$13,307.6	$12,077.6	$11,583.3	$14,390.0	$17,339.5	20.5%	100%
13	111	Agricultural Products	77.1	101.6	90.7	86.1	115.8	155.5	34.3%	0.9%
25	112	Livestock and Livestock Products	10.4	6.0	4.5	5.3	8.2	11.2	37.2%	0.1%
29	113	Forestry Products	10.4	6.0	4.5	5.3	8.2	11.2	37.2%	0.1%
30	114	Fish and Other Marine Products	0.8	0.6	0.9	1.0	1.7	0.6	-64.3%	0.0%
28	211	Oil and Gas	5.9	0.0	0.0	0.3	5.0	2.1	-58.3%	0.0%
8	212	Minerals	370.2	317.5	128.6	325.5	386.9	463.3	19.8%	2.7%
5	311	Food	992.7	932.4	922.0	909.7	999.4	975.1	-2.4%	5.6%
17	312	Beverages	29.4	38.7	29.7	29.6	39.1	39.5	1.0%	0.2%
19	313	Raw Textiles	15.7	39.1	79.4	61.6	26.5	25.1	-5.1%	0.1%
21	314	Milled Textiles	25.4	21.1	22.1	22.3	19.0	21.7	14.4%	0.1%
22	315	Apparel and Accessories	13.7	14.8	12.1	13.1	14.7	21.7	47.6%	0.1%
20	316	Leather	20.5	18.8	17.1	22.4	23.1	22.3	-3.4%	0.1%
27	321	Wood Products	4.4	3.4	5.4	7.9	9.4	6.9	-26.4%	0.0%
16	322	Paper	31.7	28.1	32.0	29.2	32.7	41.7	27.6%	0.2%
24	323	Printed Material	28.0	18.7	23.2	21.2	24.9	16.4	-33.9%	0.1%
26	324	Petroleum and Coal Products	8.8	11.4	19.4	5.7	4.9	6.9	40.4%	0.0%
3	325	Chemicals	1,047.0	1,095.5	1,063.3	1,110.0	1,238.5	1,301.2	5.1%	7.5%
10	326	Plastics and Rubber Products	191.3	178.0	161.9	175.7	206.1	225.1	9.2%	1.3%
15	327	Nonmetallic Minerals	44.7	42.9	43.1	61.4	59.8	54.1	-9.5%	0.3%
1	331	Primary Metals	4,113.4	5,562.5	4,854.4	3,888.7	6,422.3	9,109.5	41.8%	52.5%
11	332	Fabricated Metals	221.4	198.7	174.2	155.5	192.5	203.4	5.7%	1.2%
7	333	Machinery	495.3	522.1	497.9	523.4	612.8	563.6	-8.0%	3.3%
2	334	Computers and Electronics	2,349.4	2,121.4	1,718.1	1,848.3	1,569.3	1,481.5	-5.6%	8.5%
9	335	Electrical Equipment	307.9	331.5	371.9	379.5	410.5	436.0	6.2%	2.5%
4	336	Transportation Equipment	905.5	811.9	865.4	945.7	884.3	1,053.8	19.2%	6.1%
18	337	Furniture and Fixtures	35.2	48.2	34.9	26.3	30.9	32.6	5.5%	0.2%
6	339	Miscellaneous Manufactures	656.0	634.7	702.1	739.9	782.1	807.2	3.2%	4.7%
32	511	Publications	0.0	0.0	0.0	0.0	0.0	0.0	0.0%	0.0%
12	910	Waste and Scrap	121.8	168.6	159.3	136.5	221.5	160.3	-27.6%	0.9%
23	920, 930	Used Merchandise	34.5	13.4	12.3	15.9	19.7	18.5	-5.9%	0.1%
31	980	Goods Returned	0.5	0.2	0.1	0.2	0.2	0.2	2.7%	0.0%
14	990	Other Special Classification	63.8	24.6	29.9	33.8	27.1	80.9	198.3%	0.5%

Source: U.S. Census Bureau, USA Trade Online

Table 8.3: Utah Merchandise Exports by Purchasing Country and Region

Rank	Country	Millions of Current Dollars						Percent Change 2018–2019	2019 Share
		2014	2015	2016	2017	2018	2019		
	World Total	$12,224.1	$13,307.6	$12,077.6	$11,583.3	$14,390.0	$17,339.5	20.5%	100%
1	United Kingdom	1,415.2	3,036.6	3,074.0	2,318.7	5,096.2	8,751.8	71.7%	50.5%
2	Canada	1,423.1	1,491.9	1,322.7	1,212.6	1,790.7	1,391.2	-22.3%	8.0%
3	Japan	552.7	547.7	504.0	611.4	811.7	839.1	3.4%	4.8%
4	Mexico	742.0	853.9	740.9	674.7	725.5	762.3	5.1%	4.4%
5	Taiwan	676.8	710.2	610.1	636.1	712.2	639.5	-10.2%	3.7%
6	China	891.7	841.0	648.3	738.0	575.9	575.0	-0.2%	3.3%
7	Netherlands	387.8	364.9	448.6	406.7	446.9	485.7	8.7%	2.8%
8	South Korea	403.7	376.8	318.3	346.7	401.6	426.3	6.1%	2.5%
9	Switzerland	254.7	219.1	209.0	98.5	165.0	402.9	144.2%	2.3%
10	Germany	255.8	266.5	343.3	394.0	404.5	400.7	-0.9%	2.3%
11	Australia	184.3	190.5	189.5	250.5	273.2	258.1	-5.5%	1.5%
12	France	113.6	129.8	172.0	180.9	216.1	214.8	-0.6%	1.2%
13	Singapore	545.4	358.7	291.2	396.1	180.9	204.0	12.8%	1.2%
14	Belgium	268.0	127.5	87.6	98.0	128.4	167.2	30.2%	1.0%
15	Hong Kong	1,760.6	1,947.3	1,506.8	1,618.1	738.3	144.5	-80.4%	0.8%
16	India	240.3	201.7	101.5	58.7	224.3	138.3	-38.4%	0.8%
17	Italy	139.9	167.4	173.4	194.0	162.2	128.4	-20.9%	0.7%
18	Malaysia	97.4	98.1	75.9	91.3	84.2	110.4	31.2%	0.6%
19	Brazil	113.7	92.8	103.2	155.8	103.7	105.8	2.1%	0.6%
20	Spain	52.4	44.8	63.2	79.9	93.3	78.3	-16.1%	0.5%
21	Israel	59.3	40.6	49.4	57.1	63.5	60.4	-4.9%	0.3%
22	Chile	73.5	66.2	34.0	59.1	42.9	55.5	29.2%	0.3%
23	Austria	10.6	46.5	58.5	48.2	45.5	55.4	21.7%	0.3%
24	Philippines	164.2	112.6	47.8	49.2	63.2	54.7	-13.4%	0.3%
25	Ireland	24.6	44.0	36.6	40.3	32.5	53.7	65.5%	0.3%
26	Jordan	11.4	1.3	4.9	2.0	1.5	50.2	3283.9%	0.3%
27	Indonesia	36.8	58.5	33.7	37.8	41.0	45.7	11.6%	0.3%
28	Ecuador	22.8	18.5	22.1	26.4	31.4	38.3	21.9%	0.2%
29	Turkey	77.4	26.5	36.2	34.1	34.9	38.1	9.1%	0.2%
30	Thailand	532.9	147.6	129.7	63.4	57.7	37.3	-35.3%	0.2%
31	Afghanistan	0.3	0.8	0.6	2.7	12.7	36.3	186.7%	0.2%
32	Finland	24.5	25.9	30.3	29.6	25.1	33.8	34.5%	0.2%
33	United Arab Emirates	38.3	68.9	38.5	38.5	41.3	32.9	-20.3%	0.2%
34	Viet Nam	21.5	28.6	26.2	30.5	37.6	29.0	-23.0%	0.2%
35	South Africa	24.5	37.1	24.8	21.7	22.0	28.5	29.5%	0.2%

Source: U.S. Census Bureau, USA Trade Online

Table 8.4: Utah Merchandise Exports to Top Ten Purchasing Countries by Industry: 2019
(Millions of Current Dollars)

Code	Industry Name	United Kingdom	Canada	Japan	Mexico	Taiwan	China	Netherlands	South Korea	Switzerland	Germany	10-Country Industry Total
	All Commodities	$8,751.8	$1,391.2	$839.1	$762.3	$639.5	$575.0	$485.7	$426.3	$402.9	$400.7	$14,674.5
111	Agricultural Products	0.1	1.3	41.9	2.6	3.9	81.8	0.0	15.9	0.0	0.2	147.8
112	Livestock and Livestock Products	0.0	0.2	0.0	5.2	0.0	0.0	0.0	0.0	0.0	0.0	5.4
113	Forestry Products	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7
114	Fish and Other Marine Products	0.2	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4
211	Oil and Gas	0.0	0.7	0.0	1.3	0.0	0.0	0.0	0.0	0.0	0.0	2.1
212	Minerals	0.2	7.7	214.9	68.3	0.3	0.3	6.8	27.9	0.0	0.8	327.1
311	Food	5.8	91.6	65.8	69.1	76.8	37.1	35.2	161.5	0.0	1.6	544.5
312	Beverages	0.4	3.7	2.5	5.3	5.1	0.1	10.0	0.4	0.0	0.1	27.6
313	Raw Textiles	0.2	1.9	1.3	13.4	0.1	0.4	0.3	0.0	0.0	0.6	18.3
314	Milled Textiles	0.5	10.8	1.3	1.9	0.7	0.2	0.8	1.0	0.0	0.3	17.6
315	Apparel and Accessories	1.0	2.9	2.5	1.8	0.2	0.7	0.8	3.4	0.0	2.7	16.0
316	Leather	0.6	3.1	2.3	0.8	0.0	0.3	8.7	2.9	0.0	0.4	19.1
321	Wood Products	0.0	4.4	0.0	1.8	0.0	0.0	0.0	0.0	0.0	0.1	6.4
322	Paper	1.7	13.3	0.4	5.3	0.1	4.0	1.5	0.3	0.0	3.7	30.4
323	Printed Material	0.9	4.5	0.2	2.3	0.0	0.1	0.4	0.3	0.0	0.4	9.2
324	Petroleum and Coal Products	0.0	5.7	0.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	6.7
325	Chemicals	21.2	228.7	87.2	56.6	50.9	121.4	105.2	101.4	3.0	18.1	793.8
326	Plastics and Rubber Products	28.6	73.4	12.6	26.7	1.1	13.3	4.7	5.9	0.3	3.1	169.7
327	Nonmetallic Minerals	0.7	20.8	0.3	2.2	0.9	1.6	0.3	0.1	1.4	0.0	28.3
331	Primary Metals	8,533.6	116.4	3.9	16.6	0.0	0.7	0.2	11.2	320.1	0.3	9,003.0
332	Fabricated Metals	3.1	67.3	5.4	16.1	0.9	8.8	1.3	1.7	0.7	24.6	129.9
333	Machinery	27.9	137.4	22.2	31.6	15.8	50.6	14.9	13.2	1.1	23.4	338.2
334	Computers and Electronics	44.9	121.0	173.8	47.2	468.8	113.6	38.5	26.1	5.3	77.0	1,116.4
335	Electrical Equipment	18.4	63.8	10.7	75.0	4.8	15.2	40.6	3.0	0.9	62.7	295.0
336	Transportation Equipment	34.6	263.2	59.8	258.5	1.4	9.0	2.4	20.4	57.8	141.0	848.2
337	Furniture and Fixtures	0.9	13.1	0.9	10.2	0.3	0.4	0.1	0.3	0.1	0.3	26.5
339	Miscellaneous Manufactures	25.0	54.8	124.1	20.5	1.3	91.1	212.5	21.4	11.8	35.0	597.5
511	Publications	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
910	Waste and Scrap	0.0	65.6	3.4	19.1	5.8	23.2	0.0	7.7	0.0	0.4	125.3
920, 930	Used Merchandise	0.3	6.8	0.1	1.4	0.0	0.0	0.2	0.0	0.1	2.9	11.9
980	Goods Returned	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2
990	Other Special Classification	0.9	6.2	1.6	0.4	0.2	0.9	0.2	0.3	0.1	0.8	11.4

Source: U.S. Census Bureau, USA Trade Online

Price Inflation and Cost of Living

9

David Stringfellow, Office of the Utah State Auditor

INTRODUCTION

Inflation is a measure of how prices of goods and services change. It is connected to the total amount of money in an economy. As an economy grows, the amount of money should also grow if prices are to remain stable. Stable prices are desirable because it allows people to plan and use their resources for exchange in a predictable way. Low inflation (near 2.0% a year) appears to allow an economy to function efficiently and effectively.

The Federal Reserve governs money in the United States. It targets an inflation rate of 2.0% a year as most consistent with its mandate for price stability and maximum employment, conditions associated with economic growth and prosperity, and warns that an inflation rate "that is too high may reduce the public's ability to make accurate long term economic decisions." Conversely, an inflation rate that is too low would elevate the "probability of falling into deflation" —a harmful economic phenomenon where prices, and perhaps wages, fall.

A common measure of inflation is the U.S. Consumer Price Index (CPI), which measures price changes for a fixed group of similar quality goods and services over time. The U.S. Bureau of Labor Statistics calculates the CPI. Several measures of inflation exist; various agencies use a given index for a wide array of purposes. For example, the Federal Reserve utilizes the Personal Consumption Expenditures (PCE) index as their preferred measure of inflation.

2020 OVERVIEW

The global pandemic affected relative prices throughout 2020 –inflation slowed while the money supply expanded dramatically. Headline CPI grew 1.2% through October compared to 1.8% over the same period in 2019. This is a significant slowing of inflation following a serious economic shock. Other measures of inflation, like the CPE, also read 1.2% growth in the year through Third-quarter 2020. Inflation also affected economic sectors in different ways.

Motor fuel prices collapsed 30% initially and are still down 20%. Vehicle price accelerated into the fall at nearly 5%, while related maintenance consistently grew over 3% all year. Car insurance and public transit prices also fell dramatically throughout 2020–and fell respectively 7% and 14% this year. Clothing also became cheaper by about 6%.

Housing, food, medical care, and communications became more expensive from excess demand given a pandemic; inflation grew in these sectors at about twice the general rate. Education prices have grown nearly 40% this decade, but price growth only moved at 1.3% so far this year–a 25-year low.

While the long-term trend of inflation is clear, about $12 in 1960 could buy the same amount of similar goods as $100 today. Items that cost $50 in 1990 would now cost around $100 to purchase. Deflation is still a concern in a post-pandemic economic recovery.

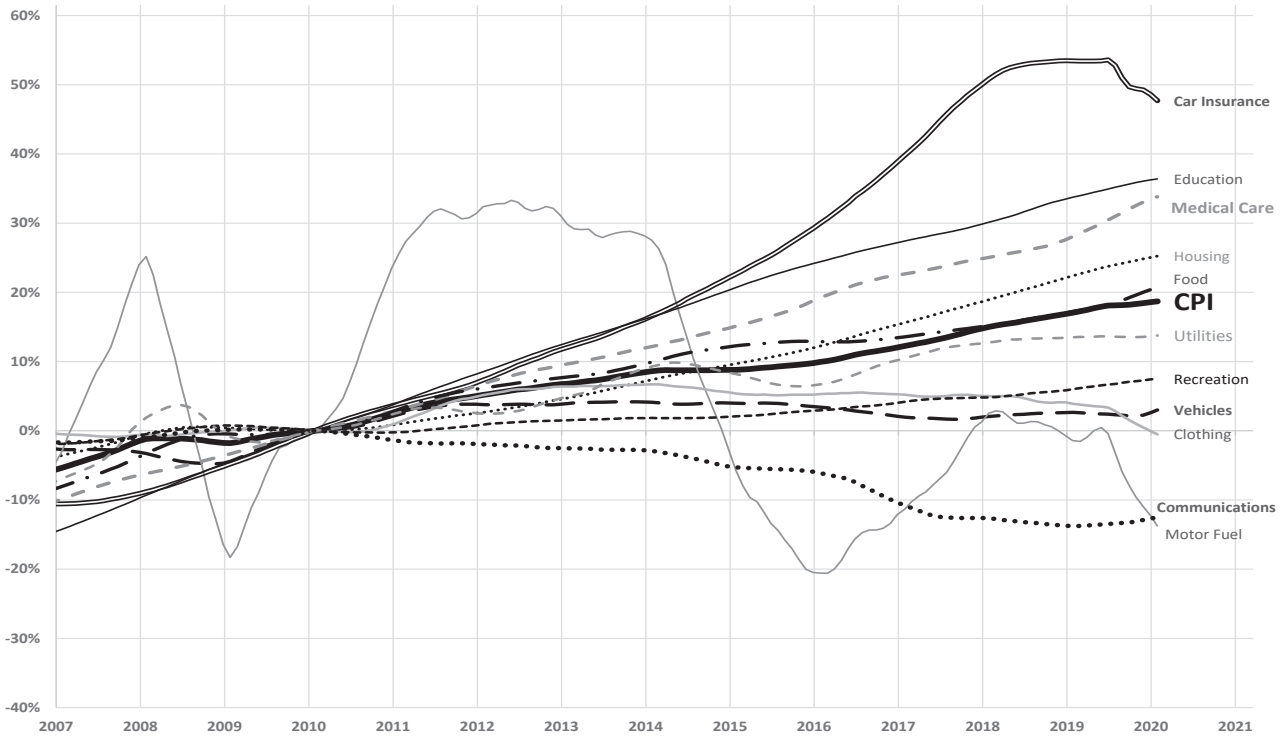
The Federal Reserve aggressively cut interest rates in response to the pandemic and unleashed liquidity to keep dollar markets functioning. Worldwide this year, central banks have injected nearly $4 trillion in new money, keeping yields on government debt at 0%. The Federal Open Market Committee (FOMC) has also signaled extraordinarily loose policy into the future.

Regional Price Parities (RPPs), updated this May, show Utah's 2018 RPP fell slightly to 96.6, indicating that the cost of living here is lower than the national average and 15% lower than California. The relative prices of goods fell, while rents accelerated from 2017.

2021 OUTLOOK

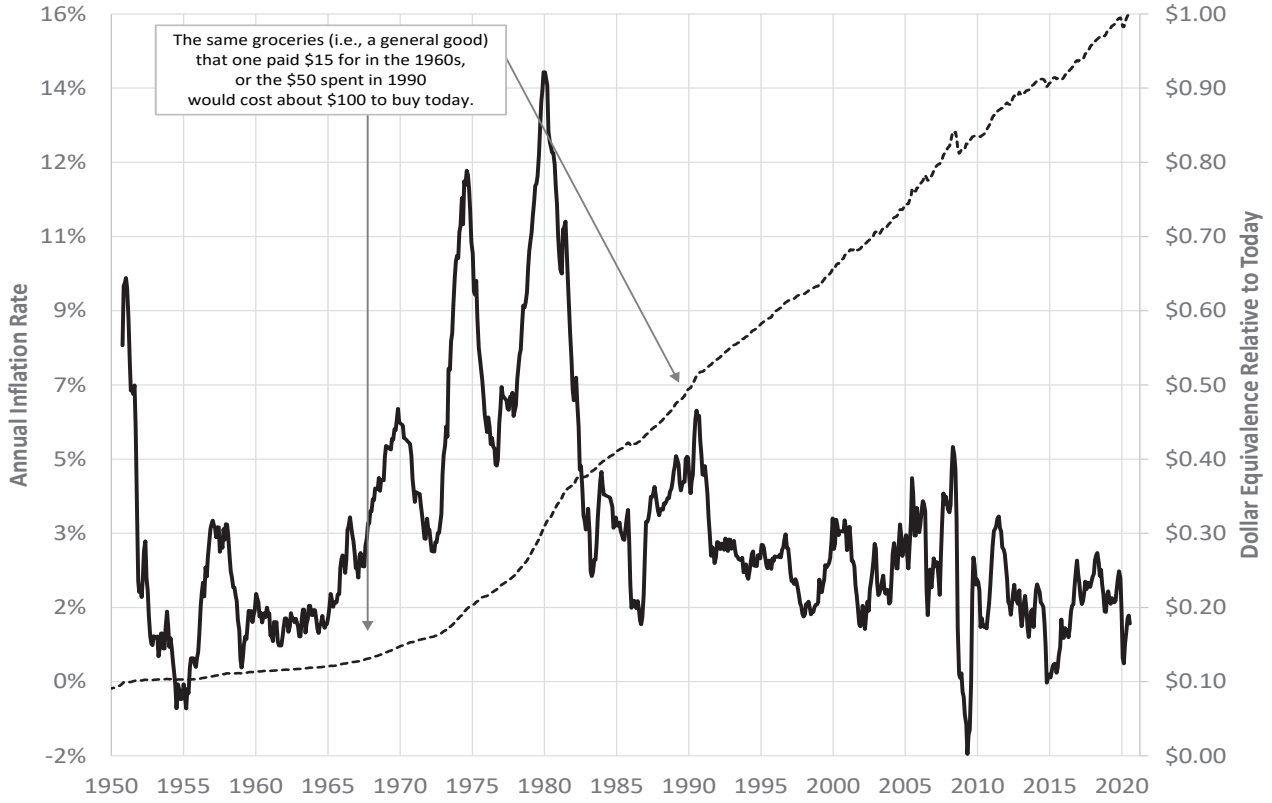
Inflation for 2021 may fall short of a 2% target as the pandemic weighs on future expectations. Asset markets have absorbed new money, as the world socks away savings. The pandemic compounds long-term pressure on low interest rates. Future inflation may be affected as much by government debts as by how consumers behave.

Figure 9.1: Cumulative Percent Change in Consumer Price Index (CPI) this Decade



Source: Calculations from CPI data

Figure 9.2: Consumer Price Index (CPI) Year-over Price Change and Relative Value of Dollar



Source: Calculations from CPI data

Table 9.1: Consumer Price Index for All Urban Consumers

(1982–1984=100) Not Seasonally Adjusted

Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Annual	Annual Change
1960	29.3	29.4	29.4	29.5	29.5	29.6	29.6	29.6	29.6	29.8	29.8	29.8	29.6	-
1961	29.8	29.8	29.8	29.8	29.8	29.8	30.0	29.9	30.0	30.0	30.0	30.0	29.9	1.1%
1962	30.0	30.1	30.1	30.2	30.2	30.2	30.3	30.3	30.4	30.4	30.4	30.4	30.3	1.2%
1963	30.4	30.4	30.5	30.5	30.5	30.6	30.7	30.7	30.7	30.8	30.8	30.9	30.6	1.2%
1964	30.9	30.9	30.9	30.9	30.9	31.0	31.1	31.0	31.1	31.1	31.2	31.2	31.0	1.3%
1965	31.2	31.2	31.3	31.4	31.4	31.6	31.6	31.6	31.6	31.7	31.7	31.8	31.5	1.6%
1966	31.8	32.0	32.1	32.3	32.3	32.4	32.5	32.7	32.7	32.9	32.9	32.9	32.5	3.0%
1967	32.9	32.9	33.0	33.1	33.2	33.3	33.4	33.5	33.6	33.7	33.8	33.9	33.4	2.8%
1968	34.1	34.2	34.3	34.4	34.5	34.7	34.9	35.0	35.1	35.3	35.4	35.5	34.8	4.3%
1969	35.6	35.8	36.1	36.3	36.4	36.6	36.8	37.0	37.1	37.3	37.5	37.7	36.7	5.5%
1970	37.8	38.0	38.2	38.5	38.6	38.8	39.0	39.0	39.2	39.4	39.6	39.8	38.8	5.8%
1971	39.8	39.9	40.0	40.1	40.3	40.6	40.7	40.8	40.8	40.9	40.9	41.1	40.5	4.3%
1972	41.1	41.3	41.4	41.5	41.6	41.7	41.9	42.0	42.1	42.3	42.4	42.5	41.8	3.3%
1973	42.6	42.9	43.3	43.6	43.9	44.2	44.3	45.1	45.2	45.6	45.9	46.2	44.4	6.2%
1974	46.6	47.2	47.8	48.0	48.6	49.0	49.4	50.0	50.6	51.1	51.5	51.9	49.3	11.1%
1975	52.1	52.5	52.7	52.9	53.2	53.6	54.2	54.3	54.6	54.9	55.3	55.5	53.8	9.1%
1976	55.6	55.8	55.9	56.1	56.5	56.8	57.1	57.4	57.6	57.9	58.0	58.2	56.9	5.7%
1977	58.5	59.1	59.5	60.0	60.3	60.7	61.0	61.2	61.4	61.6	61.9	62.1	60.6	6.5%
1978	62.5	62.9	63.4	63.9	64.5	65.2	65.7	66.0	66.5	67.1	67.4	67.7	65.2	7.6%
1979	68.3	69.1	69.8	70.6	71.5	72.3	73.1	73.8	74.6	75.2	75.9	76.7	72.6	11.3%
1980	77.8	78.9	80.1	81.0	81.8	82.7	82.7	83.3	84.0	84.8	85.5	86.3	82.4	13.5%
1981	87.0	87.9	88.5	89.1	89.8	90.6	91.6	92.3	93.2	93.4	93.7	94.0	90.9	10.3%
1982	94.3	94.6	94.5	94.9	95.8	97.0	97.5	97.7	97.9	98.2	98.0	97.6	96.5	6.1%
1983	97.8	97.9	97.9	98.6	99.2	99.5	99.9	100.2	100.7	101.0	101.2	101.3	99.6	3.2%
1984	101.9	102.4	102.6	103.1	103.4	103.7	104.1	104.5	105.0	105.3	105.3	105.3	103.9	4.3%
1985	105.5	106.0	106.4	106.9	107.3	107.6	107.8	108.0	108.3	108.7	109.0	109.3	107.6	3.5%
1986	109.6	109.3	108.8	108.6	108.9	109.5	109.5	109.7	110.2	110.3	110.4	110.5	109.6	1.9%
1987	111.2	111.6	112.1	112.7	113.1	113.5	113.8	114.4	115.0	115.3	115.4	115.4	113.6	3.7%
1988	115.7	116.0	116.5	117.1	117.5	118.0	118.5	119.0	119.8	120.2	120.3	120.5	118.3	4.1%
1989	121.1	121.6	122.3	123.1	123.8	124.1	124.4	124.6	125.0	125.6	125.9	126.1	124.0	4.8%
1990	127.4	128.0	128.7	128.9	129.2	129.9	130.4	131.6	132.7	133.5	133.8	133.8	130.7	5.4%
1991	134.6	134.8	135.0	135.2	135.6	136.0	136.2	136.6	137.2	137.4	137.8	137.9	136.2	4.2%
1992	138.1	138.6	139.3	139.5	139.7	140.2	140.5	140.9	141.3	141.8	142.0	141.9	140.3	3.0%
1993	142.6	143.1	143.6	144.0	144.2	144.4	144.4	144.8	145.1	145.7	145.8	145.8	144.5	3.0%
1994	146.2	146.7	147.2	147.4	147.5	148.0	148.4	149.0	149.4	149.5	149.7	149.7	148.2	2.6%
1995	150.3	150.9	151.4	151.9	152.2	152.5	152.5	152.9	153.2	153.7	153.6	153.5	152.4	2.8%
1996	154.4	154.9	155.7	156.3	156.6	156.7	157.0	157.3	157.8	158.3	158.6	158.6	156.9	2.9%
1997	159.1	159.6	160.0	160.2	160.1	160.3	160.5	160.8	161.2	161.6	161.5	161.3	160.5	2.3%
1998	161.6	161.9	162.2	162.5	162.8	163.0	163.2	163.4	163.6	164.0	164.0	163.9	163.0	1.6%
1999	164.3	164.5	165.0	166.2	166.2	166.2	166.7	167.1	167.9	168.2	168.3	168.3	166.6	2.2%
2000	168.8	169.8	171.2	171.3	171.5	172.4	172.8	172.8	173.7	174.0	174.1	174.0	172.2	3.4%
2001	175.1	175.8	176.2	176.9	177.7	178.0	177.5	177.5	178.3	177.7	177.4	176.7	177.1	2.8%
2002	177.1	177.8	178.8	179.8	179.8	179.9	180.1	180.7	181.0	181.3	181.3	180.9	179.9	1.6%
2003	181.7	183.1	184.2	183.8	183.5	183.7	183.9	184.6	185.2	185.0	184.5	184.3	184.0	2.3%
2004	185.2	186.2	187.4	188.0	189.1	189.7	189.4	189.5	189.9	190.9	191.0	190.3	188.9	2.7%
2005	190.7	191.8	193.3	194.6	194.4	194.5	195.4	196.4	198.8	199.2	197.6	196.8	195.3	3.4%
2006	198.3	198.7	199.8	201.5	202.5	202.9	203.5	203.9	202.9	201.8	201.5	201.8	201.6	3.2%
2007	202.4	203.5	205.4	206.7	207.9	208.4	208.3	207.9	208.5	208.9	210.2	210.0	207.3	2.9%
2008	211.1	211.7	213.5	214.8	216.6	218.8	220.0	219.1	218.8	216.6	212.4	210.2	215.3	3.8%
2009	211.1	212.2	212.7	213.2	213.9	215.7	215.4	215.8	216.0	216.2	216.3	215.9	214.5	-0.4%
2010	216.7	216.7	217.6	218.0	218.2	218.0	218.0	218.3	218.4	218.7	218.8	219.2	218.1	1.6%
2011	220.2	221.3	223.5	224.9	226.0	225.7	225.9	226.5	226.9	226.4	226.2	225.7	224.9	3.2%
2012	226.7	227.7	229.4	230.1	229.8	229.5	229.1	230.4	231.4	231.3	230.2	229.6	229.6	2.1%
2013	230.3	232.2	232.8	232.5	232.9	233.5	233.6	233.9	234.1	233.5	233.1	233.0	233.0	1.5%
2014	233.9	234.8	236.3	237.1	237.9	238.3	238.3	237.9	238.0	237.4	236.2	234.8	236.7	1.6%
2015	233.7	234.7	236.1	236.6	237.8	238.6	238.7	238.3	237.9	237.8	237.3	236.5	237.0	0.1%
2016	236.9	237.1	238.1	239.3	240.2	241.0	240.6	240.8	241.4	241.7	241.4	241.4	240.0	1.3%
2017	242.8	243.6	243.8	244.5	244.7	245.0	244.8	245.5	246.8	246.7	246.7	246.5	245.1	2.1%
2018	247.9	249.0	249.6	250.5	251.6	252.0	252.0	252.1	252.4	252.9	252.0	251.2	251.1	2.4%
2019	251.7	252.8	254.2	255.5	256.1	256.1	256.6	256.6	256.8	257.3	257.2	257.0	255.7	1.8%
2020	258.0	258.7	258.1	256.4	256.4	257.8	259.1	259.9	260.3	260.4				

Source: U.S. Bureau of Labor Statistics

Table 9.2: Regional Price Parities by State, 2018

State	All items	Goods	Services	
			Rents	Other
Alabama	86.4	96.2	61.8	91.7
Alaska	104.8	101.9	125.9	97.3
Arizona	96.5	95.7	94.3	99.1
Arkansas	85.3	95.0	60.8	92.5
California	115.4	103.8	152.5	107.4
Colorado	101.9	98.0	120.7	96.5
Connecticut	106.1	103.0	109.4	107.2
Delaware	98.8	98.8	92.3	103.4
District of Columbia	116.1	105.5	146.1	108.3
Florida	100.6	98.3	107.9	98.3
Georgia	93.0	97.2	82.0	96.1
Hawaii	118.1	110.9	148.9	104.6
Idaho	92.5	97.0	80.1	96.2
Illinois	98.1	98.5	96.5	98.6
Indiana	89.3	96.4	74.3	91.9
Iowa	89.2	94.9	74.3	91.3
Kansas	90.0	95.2	75.3	93.0
Kentucky	87.8	94.8	67.8	91.8
Louisiana	89.1	96.4	73.8	92.4
Maine	100.0	99.0	97.7	102.5
Maryland	108.4	103.1	119.1	106.0
Massachusetts	109.7	102.2	124.0	108.3
Michigan	92.4	97.3	80.2	94.5
Minnesota	97.5	101.7	94.7	94.7
Mississippi	86.0	94.4	63.1	91.8
Missouri	88.8	95.2	72.3	92.2
Montana	93.3	98.0	82.8	94.4
Nebraska	89.5	95.0	75.7	91.4
Nevada	97.5	94.5	99.2	99.9
New Hampshire	106.0	101.2	113.7	106.1
New Jersey	115.2	102.6	131.1	116.3
New Mexico	91.1	95.5	76.3	98.4
New York	116.4	108.5	131.4	114.4
North Carolina	91.8	96.4	79.0	94.5
North Dakota	90.6	94.9	80.9	91.2
Ohio	88.4	96.0	72.0	91.2
Oklahoma	88.4	95.6	70.1	92.5
Oregon	101.1	100.4	107.8	97.8
Pennsylvania	97.5	99.7	87.3	101.3
Rhode Island	99.3	98.9	95.6	102.3
South Carolina	91.1	96.6	76.7	94.5
South Dakota	87.9	94.8	69.9	91.1
Tennessee	89.9	96.2	75.1	91.7
Texas	96.8	96.9	94.5	98.2
Utah	96.6	95.1	96.1	99.0
Vermont	103.0	98.9	112.5	102.3
Virginia	102.0	99.4	108.8	100.8
Washington	107.8	104.8	123.8	102.2
West Virginia	87.8	94.8	62.9	96.1
Wisconsin	91.9	96.2	83.7	92.4
Wyoming	92.7	97.7	80.7	94.9

Source: U.S. Bureau of Economic Analysis

Social Indicators

10

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2020 OVERVIEW

Social indicators provide insights into dimensions of Utah life that are "noneconomic" in nature, but may impact the economy. This chapter includes information on social indicators from the Utah Foundation's Quality of Life Index project as well as its Social Capital Index project, which is currently in development and will be released in 2021.

Quality of Life

Since 2011, the Utah Foundation has measured community well-being through its Community Quality of Life Index. The index measures Utahns' perceptions of 20 different factors that affect their local communities, such as traffic, schools, and the cost of living. Utahns' perceptions of their "community quality of life" declined from 73 to 70 on a 100-point scale between 2013 and 2018 (the latest year this survey was issued). Declines in three measures led to this change: (1) the availability of affordable, quality housing, (2) air and water quality, and (3) good parks and recreation.

The Utah Foundation also developed a Personal Quality of Life Index in 2018. Being "secure financially" is the lowest scoring measure among the Personal Quality of Life questions. Comparatively, Utahns score high on happiness and finding meaning in life. Higher incomes and religious affiliation are tightly linked to higher Personal Quality of Life scores. Being young also has a strong, but lesser positive effect on scores.

Social Capital

Social capital is "the productive value of social connections […] not only in the narrow sense of the production of market goods and services, […] but in terms of the production of a broad range of well-being outcomes."[1]

Social capital measures the value of relationships at the individual level and within and among the broader community. These relationships are the "glue" that holds society together, the "oil" that reduces friction between groups, and the relationships that "connect people of different levels of power or social status."[2]

Utah Foundation's Social Capital Index, informed by three other indices,[3] will consist of roughly 30 metrics in seven discrete categories. The metrics are mostly "noneconomic," but are closely related to economic factors. For instance, while having graduated from college may not be a direct economic metric, college graduates tend to enjoy higher incomes and lower unemployment rates than those who have not attended college. Accordingly, many of the social capital metrics included in the index are related to households' economic well-being.

The seven categories in the Utah Foundation's Social Capital Index are (1) civic engagement, (2) social trust, (3) participation in communal life, (4) family health, (5) social cohesion, (6) focus on future generations, and (7) social mobility. This chapter briefly covers one metric from each group, with comparisons to Utah's neighboring Mountain States and the national average.

Civic Engagement: Voter Turnout

Nationally, voter turnout in the 2020 general election is expected to surpass every election since 1908, with two-thirds of the voting-eligible population casting ballots. Utah's turnout is projected to fall just short of the national rate, but be higher than any previous Utah election since at least 1980.[4] Utah's median voter turnout is just above the median rate for the Mountain States.

1 Four Interpretations of Social Capital: An Agenda for Measurement. (2013, June). Organisation for Economic Co-operation and Development, p. 9.
2 Ibid., p. 32
3 The Joint Economic Committee's Social Capital Index, the Bowling Alone Social Capital Index, and the Penn State Index.
4 United States Election Project, Voter Turnout. Available from http://www.electproject.org/home/voter-turnout/voter-turnout-data.

Social Trust: Violent Crimes per 100,000

While Utah's property crime levels, including larceny and motor vehicle theft, are above the national average, Utah Foundation uses violent crime (murder and non-negligent manslaughter, forcible rape, robbery, and aggravated assault) in its Social Capital Index. In 2019, there were approximately 236 incidents of violent crime in Utah per 100,000 people. That said, Utah's rate of violent crime is comparatively low; the Mountain State average is 422 per 100,000 people, while the national rate is 379.

Participation in Communal Life: Volunteering

Utah has long led the nation in volunteerism, primarily due to its high levels of religious-related volunteering. While the rates change from year to year and from data source to data source, Utah consistently remains at the top of all states in volunteerism. Nearly half of all residents volunteer in Utah. Idaho and Montana come in second and third among the Mountain States, with just over a third of residents volunteering.

Family Health: Families Eating Together

Family health can be measured in terms of family unity and family interaction. These interactions might include screen time on electronic devices, reading to children, and family meals. Utah Foundation has found that the state performs well in terms of family unity (such as the low percentage of single-parent families), but struggles with family interaction relative to its neighboring states. For instance, only 40% of Utah families who live together eat at least one meal together daily—the lowest percentage in the Mountain States. The percent in other Mountain States ranges from 42% in Montana to 54% in New Mexico. The national average is 44%.

Social Cohesion: Share of Population Born in the State of Current Residence

The strength of extended families is an integral part of social capital, as is the length of friendships and having a diversity of colleagues. As such, living in one place, or at least one state, can positively impact social cohesion. There are clear differences among the Mountain States on this metric. Utah has the highest percentage, with 61% of residents being native to Utah. The percent in other Mountain States ranges from 55% (New Mexico) to 27% (Nevada).

A higher proportion of Utah's population is also born in the state compared to the national average: 61% vs. 58%. While the national average has held steady since 2005, the percent of Utah's population born in the state fell from 63% to 61% during this period. The state's strong economy has led to higher in-net migration levels.

Focus on Future Generations: Investment in Public Schools

Utah has the lowest K-12 per-pupil spending in the nation. However, when measuring student spending per $1,000 of personal income (which can be interpreted as the amount of effort the state devotes to students given its available resources), Utah ranks much higher. In 2018, Utah spent $33 per $1,000 of personal income, just under the Mountain State average.

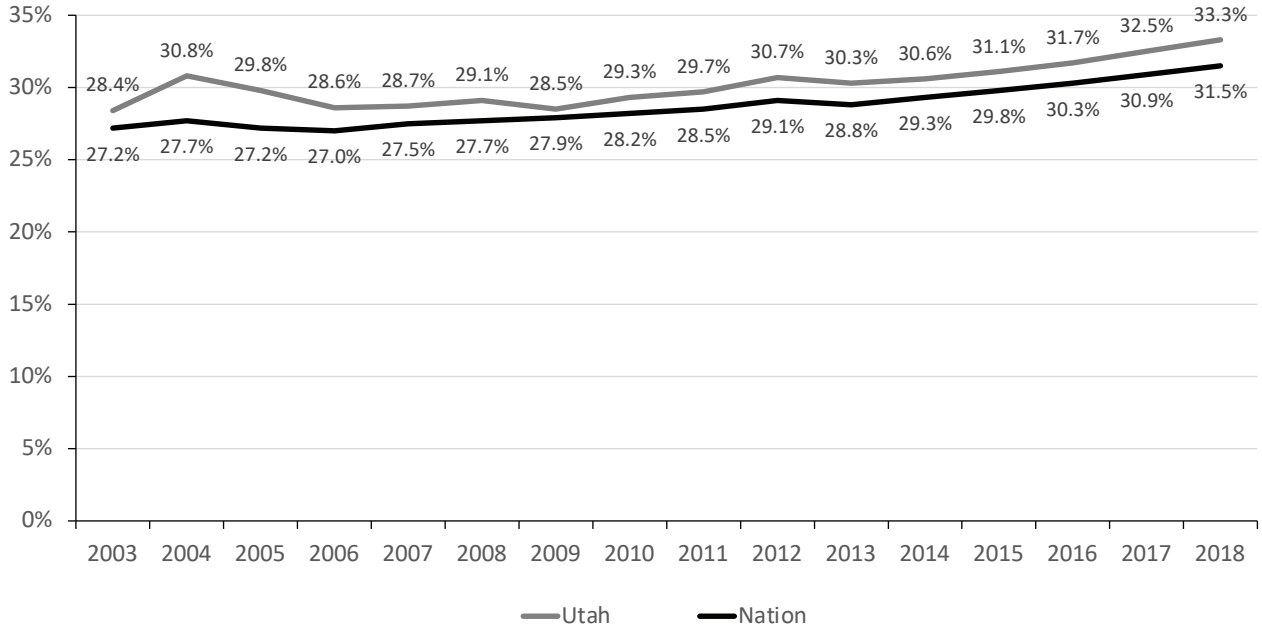
The Mountain State average is led by Wyoming, which spends $47 per $1,000 of personal income. Arizona is at the bottom, at $25 per $1,000.

Social Mobility: Share of Population that are College Graduates

Post-secondary education is one of the strongest predictors of social mobility due to the social capital gained through education. Colorado leads the Mountain States with the highest share of college graduates age 25 years or older (40%), followed by Utah (33%). Nevada has the lowest share of college graduates, with less than one-quarter of its residents age 25 years or older holding a bachelor's degree or higher.

The share of the population with bachelor's degrees has increased by more than 5% in both Utah and nationally since the turn of the millennium.

Figure 10.1: Share of Population Age 25 Years or Older with a Bachelor's Degree or Higher, 2003–2018



Source: U.S. Census Bureau, American Community Survey.

Table 10.1: Social Capital Indicators

Area	Voter Turnout 2016 (Percent)	Voter Turnout 2020(e) (Percent)	Violent Crime Rate 2019 (Rate per 100,000)	Volunteerism 2017 (Percent)	Share of Families Eating a Meal Together Every Day 2017–2018 (Percent)	Share of Population Born in the State of Current Residence 2018 (Percent)	State & Local Public School Education Spending per $1,000 of Personal Income, 2018 (Percent)	Share of Population Age 25 Years or Older with a Bachelor's Degree or Higher, 2018 (Percent)
Utah	62.7%	66.2%	235.6%	45.1%	40.1%	61.3%	33.1%	33.3%
Arizona	60.4%	65.5%	455.3%	25.5%	49.3%	39.7%	25.4%	28.9%
Colorado	69.5%	76.4%	381.0%	30.2%	45.2%	41.9%	29.2%	40.1%
Idaho	62.1%	67.7%	223.7%	35.1%	45.7%	46.5%	30.4%	26.9%
Montana	65.9%	73.1%	404.9%	33.5%	42.0%	52.8%	35.9%	31.2%
Nevada	60.5%	63.6%	493.8%	21.2%	47.6%	27.0%	30.2%	24.2%
New Mexico	54.8%	61.0%	832.2%	25.0%	53.9%	55.1%	36.8%	27.1%
Wyoming	64.8%	64.6%	217.4%	30.7%	47.0%	42.4%	46.6%	26.9%
Mtn. State avg.	62.6%	65.9* %	422.0%	30.8%	46.4%	45.9%	33.5%	29.8%
National avg.	61.4%	66.4%	379.4%	n/a%	43.7%	58.1%	37.0%	31.5%

Note: e = estimate. *Median.

Sources:

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National Survey of Children's Health, combined 2017–2018 data from Child and Family Health Measures. Available from https://www.childhealthdata.org/browse/survey.

American Community Survey, "American Community Survey Data Profiles" (2018). Utah Foundation calculations and Table S0501: Selected Characteristics of the Native and Foreign-Born Populations, Utah Foundation calculations.

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Economic Development

11

Utah Governor's Office of Economic Development
Economic Development Corporation of Utah

2020 OVERVIEW

Job Growth

With the onset of the COVID-19 pandemic throughout the U.S. and the shutdown of non-essential businesses, job growth fluctuated wildly in 2020. Despite this, Utah ranked second best in the nation for year-over job growth at -0.2% during the month of November, with the national average at -6.0% that month.[1] This corresponds to a decrease of 2,800 Utah jobs as of November 2020.[2]

In 2019, the Utah Governor's Office of Economic Development (GOED) and the Economic Development Corporation of Utah (EDCUtah) worked together to support 33 company relocations or expansions in Utah, adding over 9,100 jobs to the state's economy and retaining over 500 additional jobs.[3] These projects created capital investments in Utah totaling more than $1.2 billion.[4]

Major Projects

Notable expansions or relocations in 2019 include Northrop Grumman adding over 2,200 jobs in Weber County, Malouf adding over 1,100 jobs in Cache County, GoHealth adding over 1,100 jobs in Utah County, and Proctor & Gamble, adding over 200 jobs and over $300 million in capital investment in Box Elder County.[5]

Business Climate

Utah's young, educated workforce continues to grow, state and local governments remain fiscally responsible and stable, and the cost of doing business in Utah remains lower than the national average. Utah continues to receive recognition as a leading global business destination, enjoying accolades from national sources like *Forbes*, which has ranked Utah in the Top 10 Best States for Business since their rankings began, placing Utah third in 2019.[6] In Nov. 2019, *Forbes* also named Utah the Best State for Entrepreneurs in 2020.[7]

Utah also ranked fourth on *CNBC*'s "America's Top States for Business 2019." Factors contributing to this ranking include a strong economy, high quality of life, business friendliness, and quality infrastructure.[8] In Dec. 2019, *The Wall Street Journal* named Utah America's "economic star".[9]

Trends

Utah's targeted industries employed over 274,000 Utahns in 2020, up from 265,000 in 2019, demonstrating 3.3% growth.[10] Utah updated their targeted industries in 2020 to include Advanced Manufacturing, Aerospace and Defense, Energy, Financial Services, Life Sciences and Healthcare Innovation, Outdoor Products and Recreation, Software and IT, and Tourism and Film.

Utah-based companies raised $1.46 billion in venture capital in 2019. Strong investment activity continued in 2020, with companies raising over $1.27 billion as of Dec. 2. Utah also saw over $7 billion worth of mergers and acquisitions by Dec. 2, 2020.[11]

1 Change in total nonfarm employment by state, over-the-month and over-the-year, seasonally adjusted. (n.d.). Retrieved from https://www.bls.gov/web/laus/statewide_otm_oty_change.htm. 2 Dec. 2020.
2 State and Metro Area Employment, Hours, & Earnings. CES National News Releases. (n.d.). Retrieved from https://www.bls.gov/ces/. 2 Dec. 2020.
3 Project Report. *The Economic Development Corporation of Utah*. Internal data. 2 Dec. 2020.
4 ibid.
5 Newsroom. (n.d.). Retrieved from https://business.utah.gov/news/. 2 Dec. 2020.
6 Best States For Business. (n.d.). Retrieved from https://www.forbes.com/best-states-for-business/list/. 2 Dec. 2020.
7 DePietro, A. (2019, November 13). The Best And Worst States For Entrepreneurs In 2020. Retrieved from https://www.forbes.com/sites/andrewdepietro/2019/11/13/best-worst-states-entrepreneurs-2020/#28c26df246a6. 2 Dec. 2020.
8 Fukada, S. (2019, July 26). Top States for Business. Retrieved from https://www.cnbc.com/americas-top-states-for-business/. 2 Dec. 2020.
9 Moore, S. (2019, December 6). Why Utah Has Become America's Economic Star. Retrieved from https://www.wsj.com/articles/why-utah-has-become-americas-economic-star-11575676394
10 *The Economic Development Corporation of Utah*. Internal data. 2 Dec. 2020.
11 PitchBook. (n.d.). Retrieved from https://pitchbook.com/. 2 Dec. 2020.

Utah's Unified Response to the Coronavirus Pandemic

The coronavirus pandemic created unique and dynamic economic and health challenges. One constant factor is citizens' unwavering desire for state officials to keep them informed of the latest COVID-19 news. The state continually distributes relevant information about the pandemic with the firm belief that timely and consistent communication is the key to surviving the crisis.

Utah created coronavirus.utah.gov, where it maintains resources and information on health and maintaining business and education operations. Additionally, GOED hosts a coronavirus page where companies find the latest information on federal, state, and local loans and grant programs., while also maintaining inutah.org, focused on safe economic reactivation and elevating consumer confidence.

Keeping Utahns Informed of Economic Relief Programs

At the onset of the pandemic, GOED was given state officials' directive to disperse economic relief monies to as many qualifying small businesses and entrepreneurs as possible. The result is an impressive list of diverse grant programs designed to provide an immediate lifeline to many struggling companies.

<u>Loan and Grant Programs Include:</u>

Small Business Bridge Loan

The Utah Leads Together Small Business Bridge Loan used $11 million in state funds and a $1 million donation from WCF Foundation to provide gap funding early in the pandemic to Utah's small businesses. The program served more than 1,149 Utah small businesses and nonprofits and positively impacted approximately 15,000 jobs.

Commercial Rental & Mortgage Assistance Program

The COVID-19 Commercial Rental Assistance Program, known as ComRent, provided rental relief to Utah small businesses that lost revenue due to measures taken during the pandemic to minimize the public's exposure to COVID-19. After a couple of legislative adjustments, the program was funded with $23 million. Since ComRent's inception, GOED has awarded $20,135,751 to help companies with rent and mortgage payments.

In Utah

GOED partnered with Salt Lake City-based RUMOR Advertising on several outreach and education programs. The nearly $2 million, award-winning 'In Utah' campaign used federal CARES Act money and focused on intentional connections between consumers, businesses, and Utah experiences. GOED and RUMOR collaborated on In Utah, Healthy In Utah, and Learn & Work In Utah to support economic reactivation, pandemic health guidance and workforce training for Utahns.

Healthy In Utah

This $1 million initiative encouraged healthy activity during the COVID-19 pandemic, such as following current CDC, state and local health guidelines, and not forgoing other preventive or urgent medical care. During the fall, the campaign focused exclusively on promoting flu vaccines.

Impacted Businesses Grant Program

Known as Shop In Utah, this popular grant program helped support businesses and provided discounts to consumers. After legislative adjustments, $62,000,000 in federal CARES Act funds were allocated to the program. Nearly 1,000 Utah businesses participated in the program.

COVID-19 PPE Support Grant Program

Known as 'Safe In Utah,' this $5 million grant program helped businesses keep employees and customers safe. It provided grants for a company's COVID-19 response consisting of the purchase of personal protective equipment (PPE), implementation of workplace redesigns, additional signage, new technology solutions for distance working, and other items to comply with COVID-19 public health guidelines on safely returning employees to work.

Displaced Worker Grant Program

This $16.5 million initiative, called "Learn & Work In Utah," provided training for workers displaced due to COVID-19 by funding GOED's Utah Works program within Talent Ready Utah. It included several workforce training programs and local colleges and universities to provide education and training to displaced workers.

COVID-19 Oil, Gas, and Mining Grant

This $5 million grant program helped businesses in the oil, gas, and mining industries.

Tourism Recovery Programs

This $12 million grant helped Utah's tourism companies and included "Meet In Utah," with specific consideration for meeting and convention facilities and businesses.

Hospital Grants

$20 million in hospital grants helped Utah hospitals maintain their response to the pandemic.

Learn more about GOED's coronavirus initiatives at business.utah.gov/coronavirus.

2021 OUTLOOK

Because of Utah's diverse mix of industries, the state economy is expected to mirror trends in the national economy, but at a greater rate.[12]

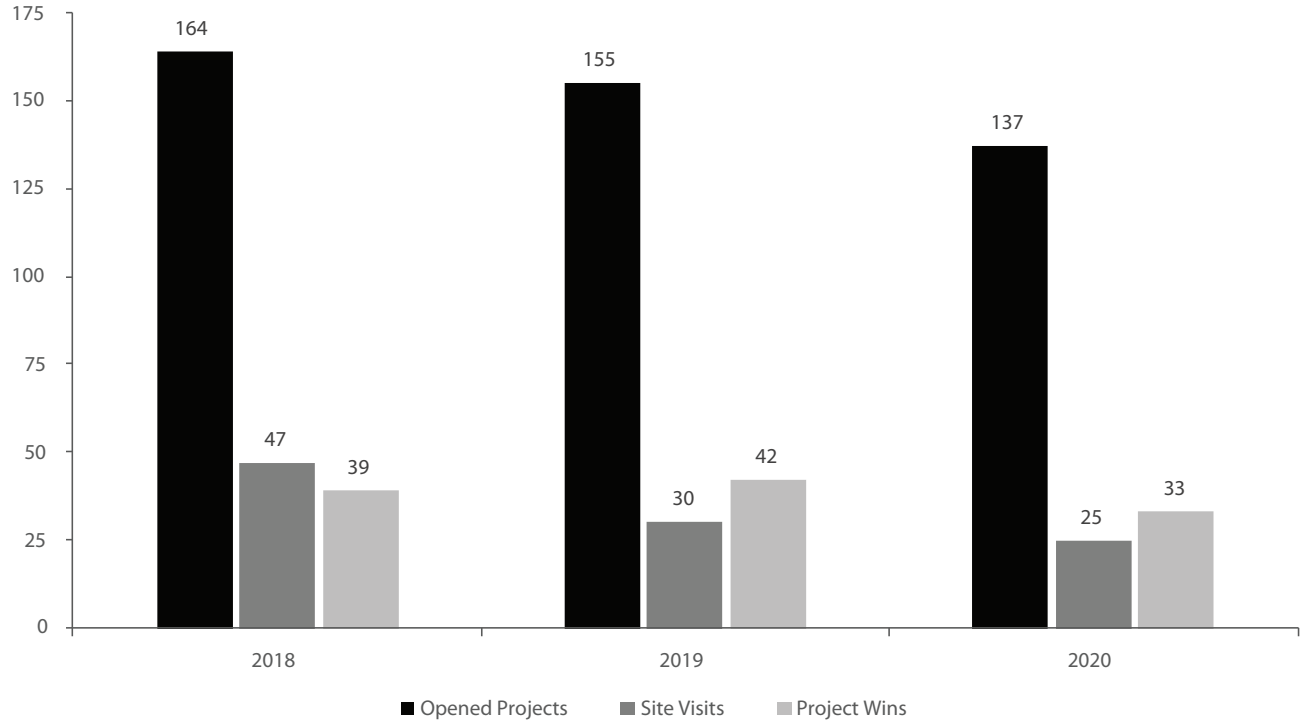
As economic recovery from the global COVID-19 pandemic continues in 2021, Utah is poised to lead in economic growth and prosperity. Rich States, Poor States lists Utah as its No. 1 state for Economic Outlook.[13] WalletHub listed Utah as the 7th highest state whose unemployment rate has bounced back most from the initial declines due to the 2020 COVID-10 global pandemic.[14] These signs and others point to an excellent recovery for Utah in 2021 and beyond.

12 "Utah's Economy among the Most Diverse in the Nation," Kem C. Gardner Policy Institute. Utah Informed: Visual Intellection for 2020. Jan. 2019.

13 "Examining the latest movements in state economic growth and competition," Rich States Poor States. Retrieved from https://www.richstatespoorstates.org/states/UT/. 2 Dec. 2020.

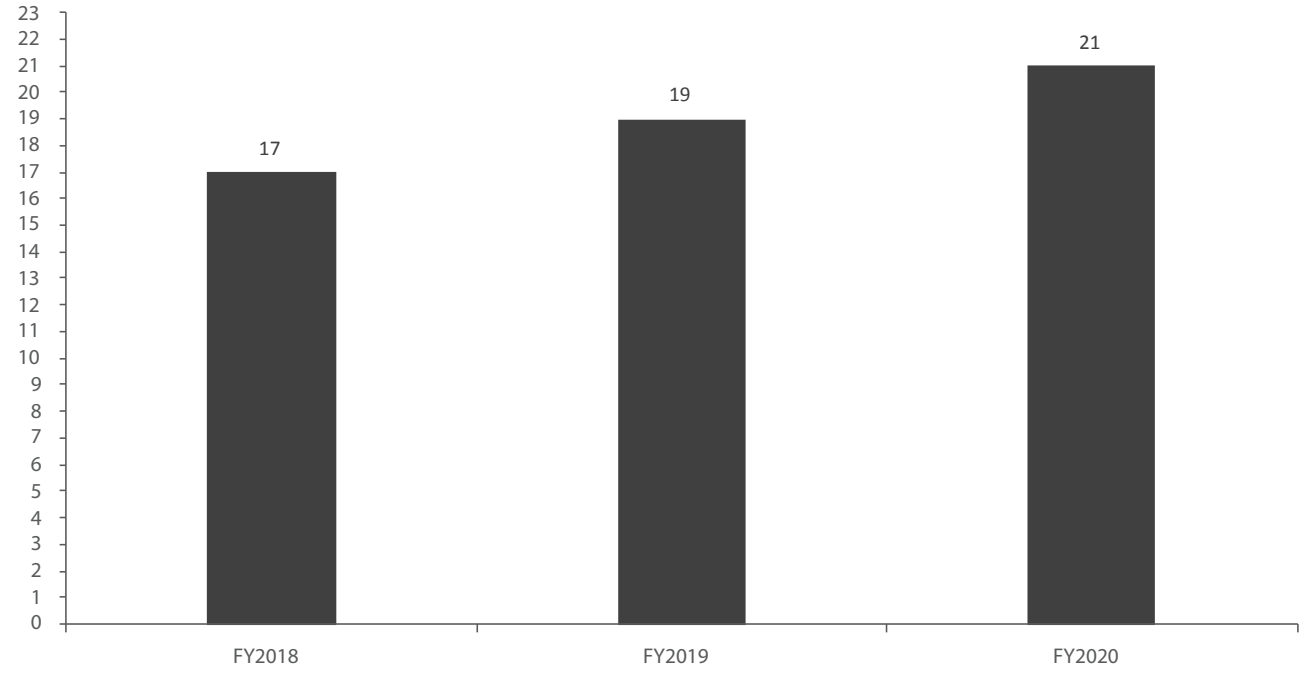
14 "States Whose October Unemployment Rates Are Bouncing Back Most," WalletHub. Retrieved from https://wallethub.com/edu/states-unemployment-rates/74907. 2 Dec. 2020.

Figure 11.1: Economic Development Project Summary



Source: U.S. Census Bureau, American Community Survey.

Figure 11.2: Economic Development Tax Incentive Fund Project Summary, Board Approved



Source: U.S. Census Bureau, American Community Survey.

Public Education

12

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2020 OVERVIEW

Enrollment

In fall 2020, there were 666,609 students in Utah's public education system, a decrease of 794 students (0.1%) from fall 2019. There were 46,903 kindergarten students, a decrease of 1,910 students, or 1.0%, from the previous fall 2019 (48,813).

Although Utah's student population is primarily white (73.2 percent), it is becoming more diverse. In fall 2020, 17.9 percent of Utah's student body was Hispanic or Latino, 1.7 percent was Asian, 1.6 percent was Pacific Islander, 1.0 percent was American Indian and Alaska Native, 1.4 percent was African American or Black, and the remaining students (3.1 percent) identified with multiple ethnicities. According to state population projections, within the school-age population (5 to 17 years of age) individuals identifying as non-White will grow from 25% in 2015 to 42% in 2065.

In 2020, there were 112 operating charter schools in Utah. Charter schools operate independently of school districts but receive public funds and must adhere to federal and state laws in using those funds for operations. Charter schools are educating 79,255 students, about 8.4 percent of all Utah students in public schools.

Transportation

In Fall 2019, the state's 2,987 school buses transported 195,191 students 27,624,588 miles to and from school. 30% of students are transported on school buses to and from school.

Construction

In 2020, the Utah State Board of Education issued 54 construction project numbers to 12 school districts and 14 charter schools located throughout the state. These construction projects include new or replacement schools composed of 4 junior high/middle schools, 5 elementary schools and 1 charter school.

Finances

In fiscal year 2017, the most recent year for which National Center for Education Statistics data are available by state, Utah's net current expenditure per pupil was $7,206 (the nation's lowest). Net current expenditures do not include capital spending. Including capital spending raises total expenditure per pupil for fiscal year 2017 to $8,794. However, some consider current expenditure as a percent of total personal income as a better measure of Utah's effort to fund public education. Using this measure, Utah ranks 36th nationally, at 3.5%. Utah's per pupil net current expenditures for fiscal year 2020 was $8,506.

For fiscal year 2021, the Legislature appropriated funds for a $64 increase (1.8 percent) in the regular Weighted Pupil Unit (WPU) value, increasing it from $3,532 to $3,596 for fiscal year 2021. The cost of the Basic School Program is estimated to be $3,187,445,100. Of these funds $557,252,600 come from local property tax revenues and $2,635,292,500 come from state income tax revenues.

Achievement

In 2020, Utah ranked 30th in the nation with an ACT Average Composite Score of 20.2. Utah is one of only 15 states in the nation where the test is offered to 100% of high school students.

Statewide, the class of 2020 graduation rate was 88.0%, a 1.0% increase over the previous year's rate.

In 2020, Utah's pupil-teacher ratio was 21.6, which is a slight 0.1% decrease compared with the previous year's ratio.

A total of 43,916 Utah students earned 323,754 hours of college credit in 2020 through Utah's concurrent enrollment program. This total represents a 12.9% increase in students over 2019. Ninety-five percent of the credits attempted are passed.

A total of 28,136 Utah public school students took 42,289 Advanced Placement (AP) exams in 2020 with 28,337 earning a score of 3-5 (a 67% pass rate, meaning the scores were good enough to earn college credit). Nationally, the pass rate at public schools is 62.5%.

Utah has 14 schools involved in the International Baccalaureate (IB) program, including 8 that offer IB diplomas. There are 1,683 students enrolled in the Primary Years Program, 778 in the Middle Years Program, 962 in the Diploma Program and 24 in the Career-Related Program.

220 Utah schools—or about 21.0% of all Utah schools—offer dual immersion programs in French (23), German (2), Mandarin Chinese (53), Russian (2), Portuguese (9), Arabic (1), and Spanish (107). Twenty-five additional schools offer more than one language.

2021–2022 Outlook

Enrollment

For the 2022 school year, growth in student enrollment is expected, as Utah is expected to continue experiencing net in-migration, and has among the nation's highest birth rate and fertility rate. Total enrollment in Utah's public education system in fall 2022 is forecasted to increase by 7,245 students (1.1%) to 673,854. An estimated total cost for fiscal year 2022 is $27.8 million ongoing and $5.3 million one-time funding.

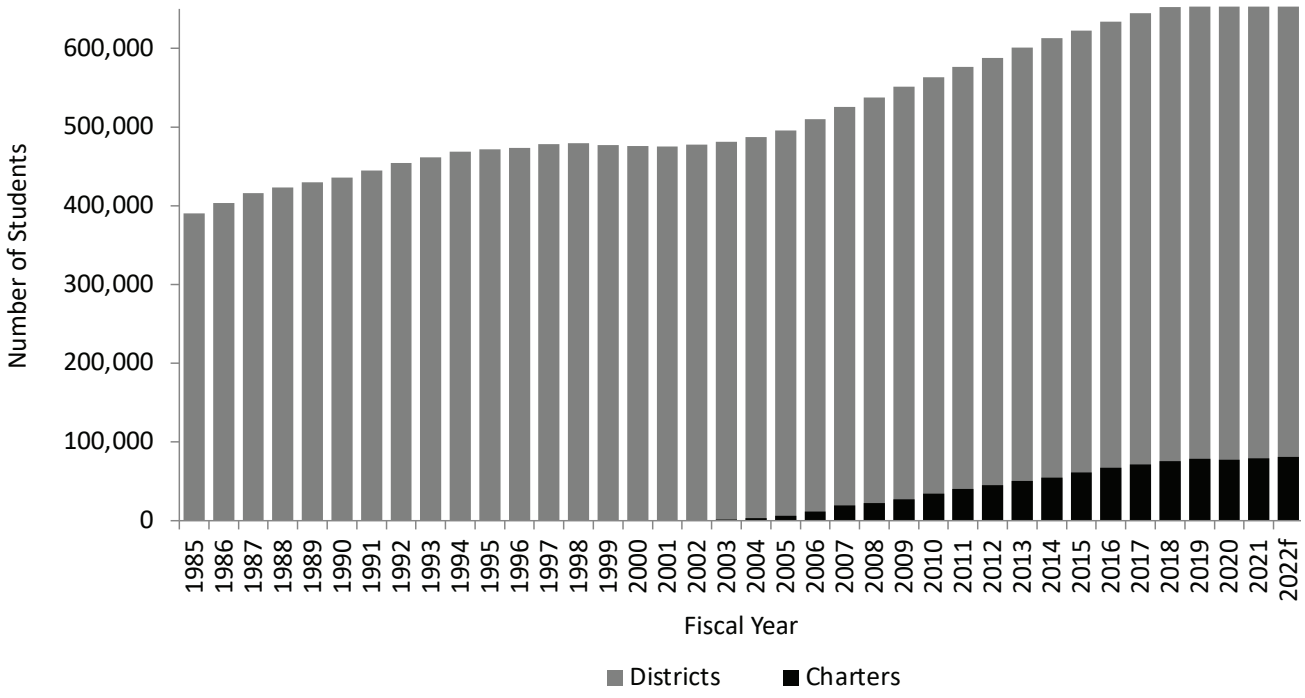
In most of the past five school years, the incoming kindergarten class was smaller than in the prior year. This change corresponds to a declining number of total births five years prior. Based on birth trends, declining kindergarten class size is expected to continue.

Utah's charter school enrollment has increased by approximately 2.6% per year, on average, over the last four years. It is forecasted that enrollment in charter schools in Utah will grow by 1.9% in the fall of 2021.

Impacts of COVID-19

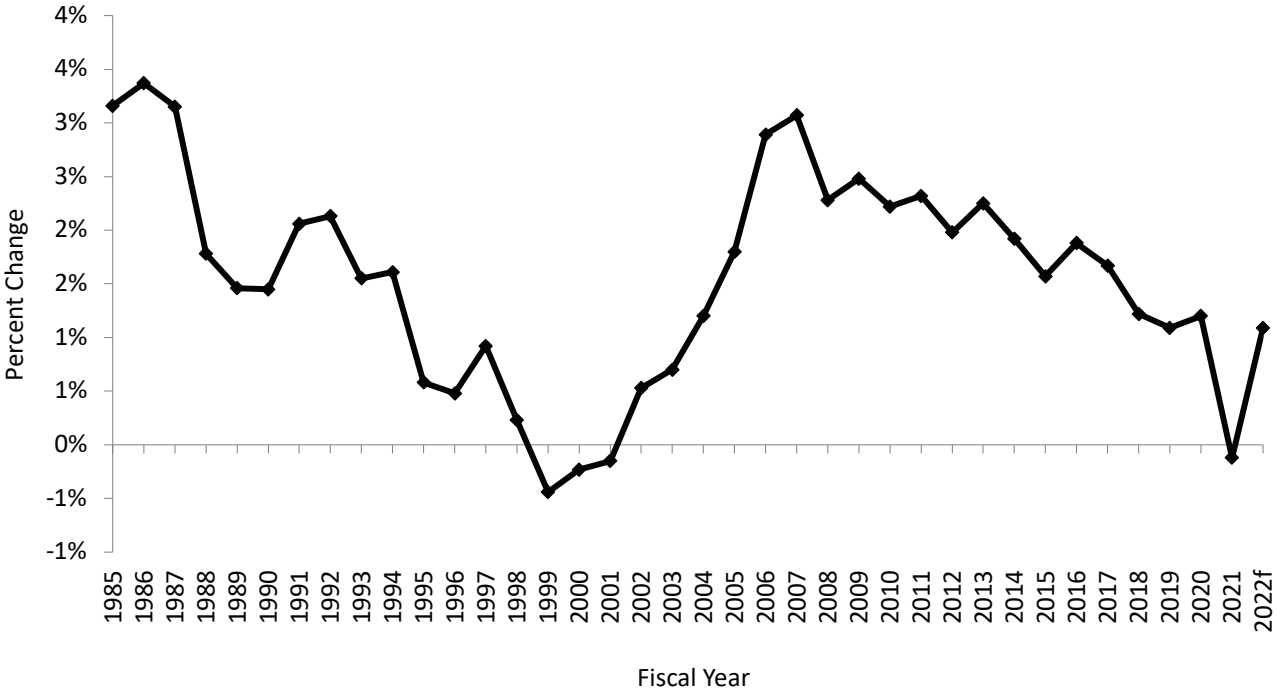
The COVID-19 pandemic presented unprecedented challenges to public education in 2020. Utah K-12 students transitioned to an online learning environment in March 2020 to complete the 2019-2020 school year. School districts continue to use a virtual component to varying degrees in the 2020-2021 school year. The direct and indirect impacts of this disruption on K-12 students are still unfolding. 2021 will likely bring more insight into what these impacts are, their effects on different student groups, and how they will be addressed.

Figure 12.1: Utah Public Education Enrollment, FY 1985–FY 2022f



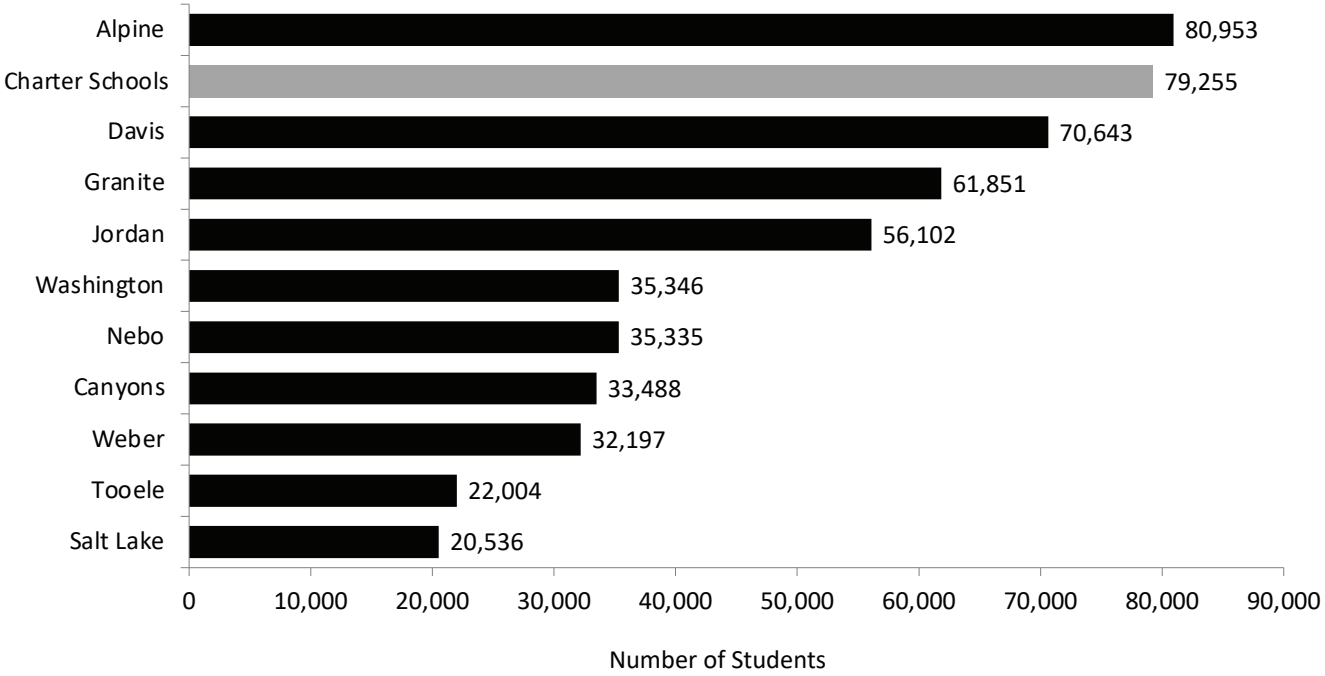
Note: f = forecast
Source: Utah State Board of Education, School Finance & Data and Statistics

Figure 12.2: Percent Change in Public Education Enrollment, FY 1985–FY 2022



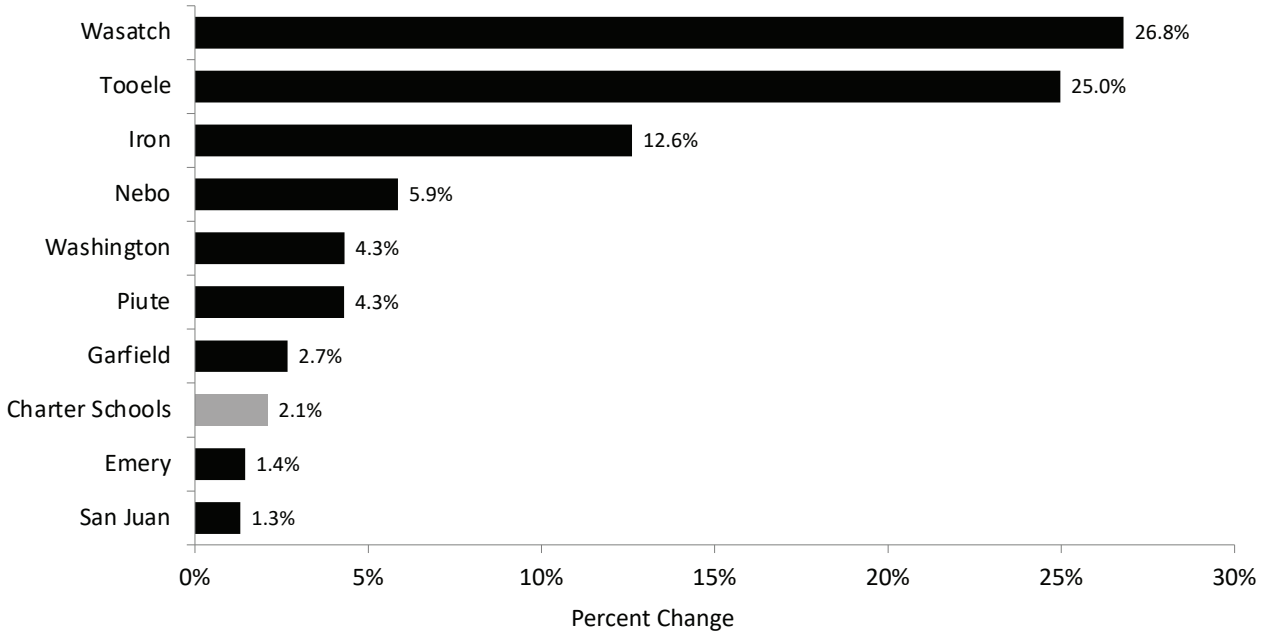
Note: f = forecast
Source: Utah State Board of Education, School Finance & Data and Statistics

Figure 12.3: Largest Enrollment by District, FY 2021



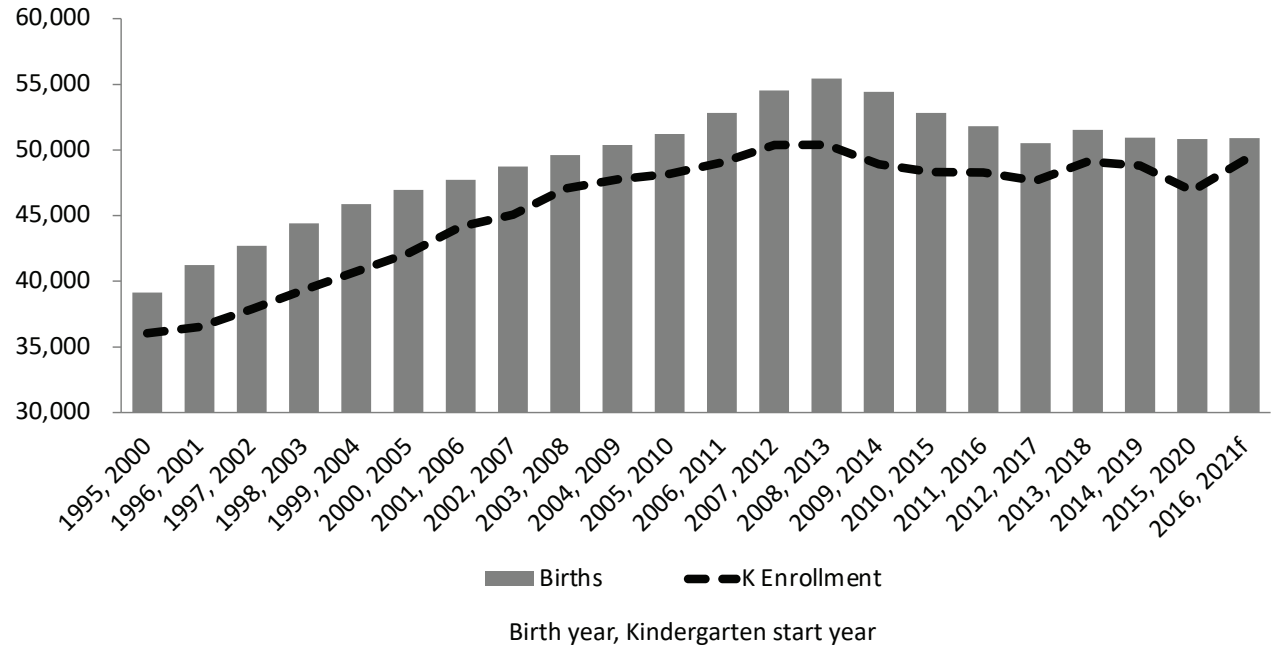
Source: Utah State Board of Education, School Finance & Data and Statistics

Figure 12.4: Largest Enrollment Growth by District, FY 2020–FY 2021



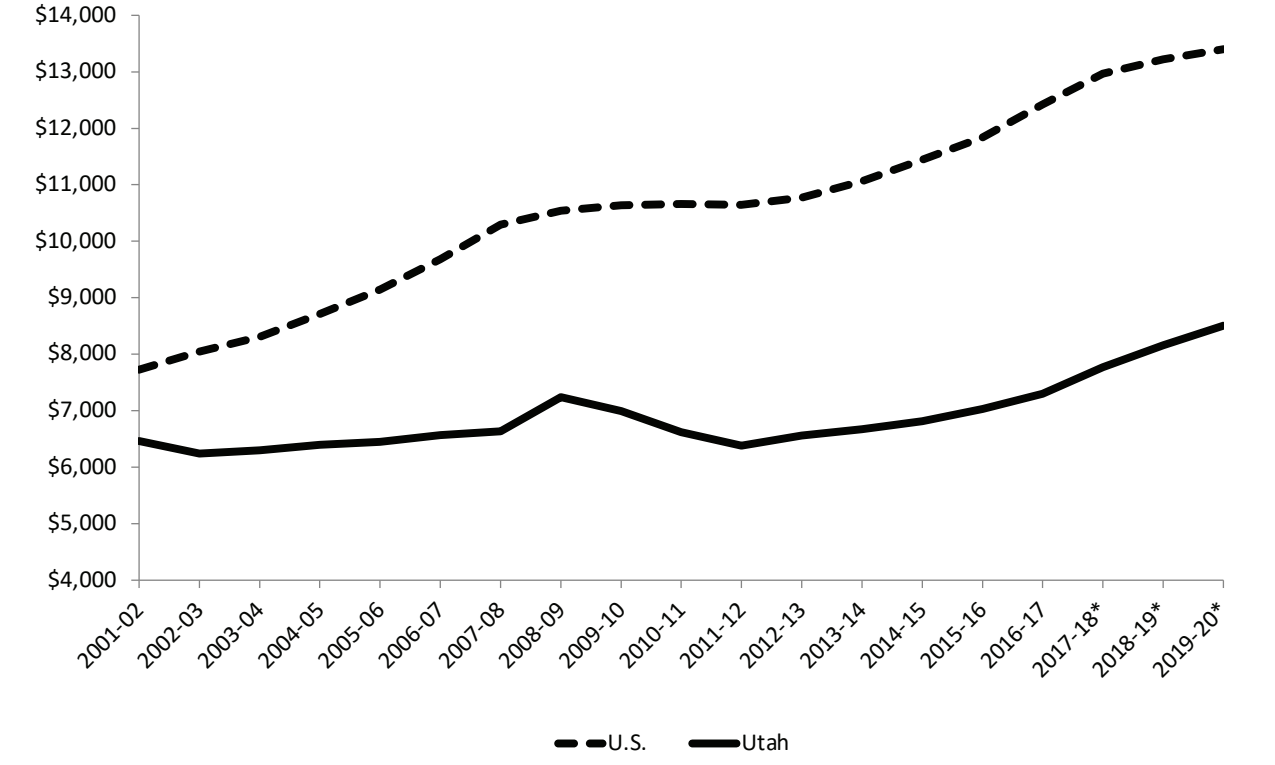
Note: Due to the COVID pandemic, there were uncommon changes in enrollment whereby some districts showed dramatic growth and others dramatic losses. Therefore, enrollment growth by district from FY20 to FY21 is not likely indicative of any forecasted trend.
Source: Utah State Board of Education, School Finance & Data and Statistics

Figure 12.5: Kindergarten Enrollment and Five Years Prior Births, 2000–2021



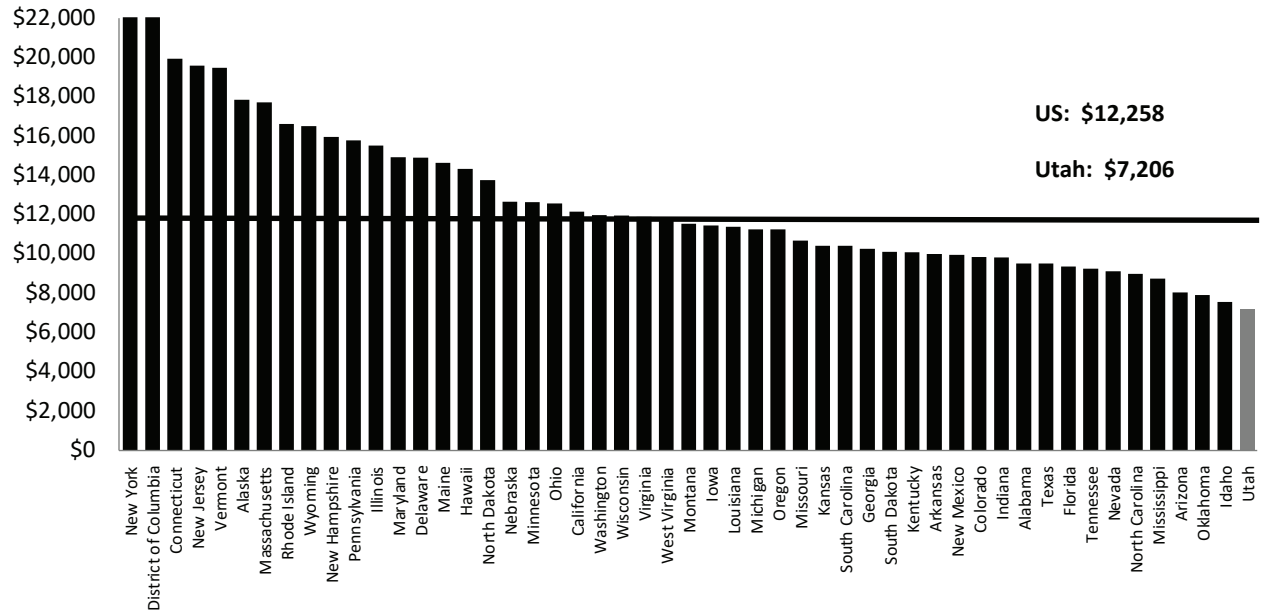
Source: Utah State Board of Education - School Finance & Data and Statistics, Interagency Common Data Committee, and Utah Department of Health

Figure 12.6: U.S. FY 2020 Projection and Utah Current Expenditures per Pupil in Enrollment, FY 2002–FY 2020



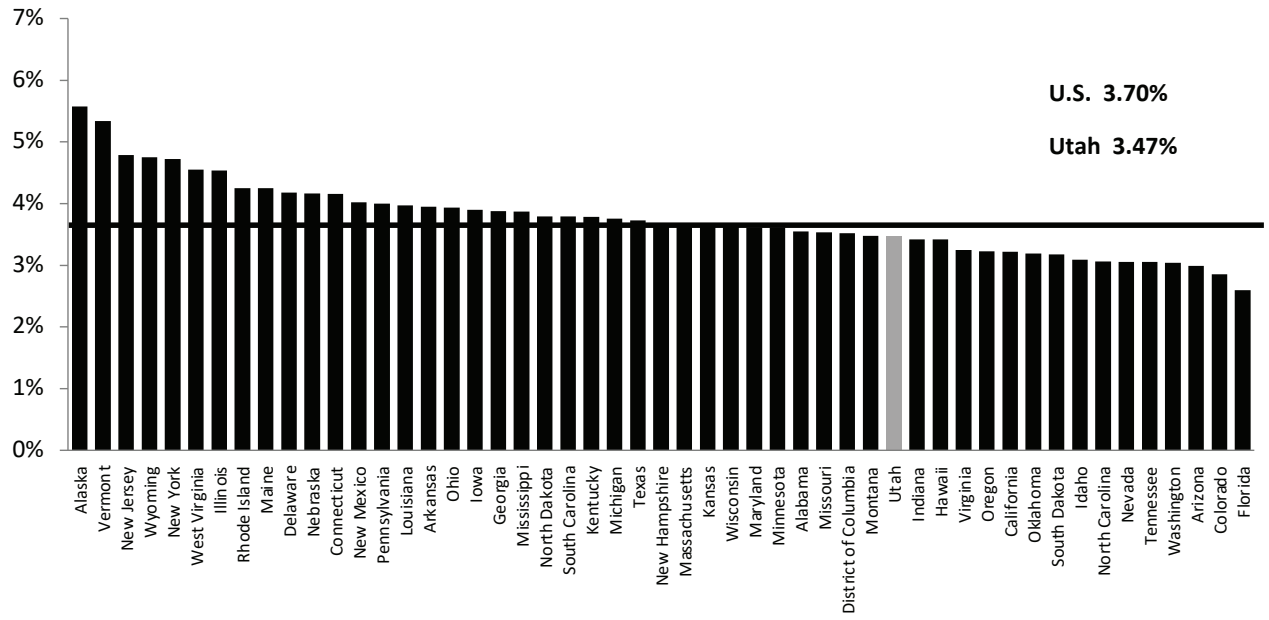
Note: U.S. expenditures are in constant 2018-19 dollars based on the Consumer Price Index adjusted to a school-year basis.
* For Fiscal Years 2018-2020*, U.S. data is projected at time of publication.
Source: USBE, School Finance, and U.S. Department of Education, National Center for Education Statistics

Figure 12.7: Current Expenditures per Pupil, by State, FY 2017



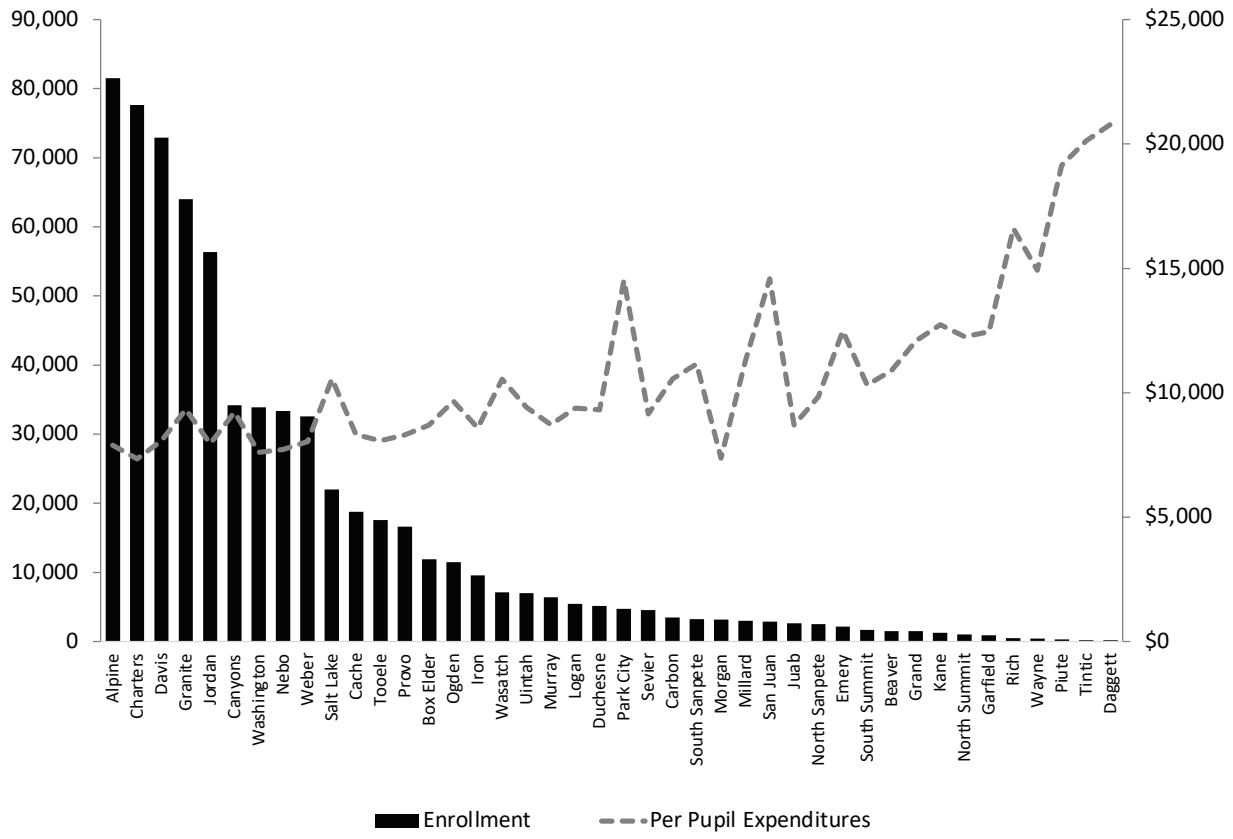
Source: USBE, School Finance, and U.S. Department of Education, National Center for Education Statistics

Figure 12.8: Current Expenditures as a Percentage of Personal Income, by State, FY 2017



Source: USBE, School Finance, U.S. Department of Education, National Center for Education Statistics, and the Bureau of Economic Analysis

Figure 12.9: Utah Total Enrollment and Current Expenditures per Pupil by District, FY 2020



Source: USBE, School Finance

Table 12.1: Utah Public School Enrollment and State of Utah Population

Year	October 1 Enrollment	Annual Change	Percent Change	July 1 State Pop	Annual Change	Percent Change	Enrollment/ Population
1980	342,885	10,310	3.1%	1,474,000	58,050	4.1%	23.3%
1981	354,540	11,655	3.4%	1,515,000	41,000	2.8%	23.4%
1982	369,338	14,798	4.2%	1,558,000	43,000	2.8%	23.7%
1983	378,208	8,870	2.4%	1,595,000	37,000	2.4%	23.7%
1984	390,141	11,933	3.2%	1,622,000	27,000	1.7%	24.1%
1985	403,305	13,164	3.4%	1,643,000	21,000	1.3%	24.5%
1986	415,994	12,689	3.1%	1,663,000	20,000	1.2%	25.0%
1987	423,386	7,392	1.8%	1,678,000	15,000	0.9%	25.2%
1988	429,551	6,165	1.5%	1,690,000	12,000	0.7%	25.4%
1989	435,762	6,211	1.4%	1,706,000	16,000	0.9%	25.5%
1990	444,732	8,970	2.1%	1,729,227	23,227	1.4%	25.7%
1991	454,218	9,486	2.1%	1,780,870	51,643	3.0%	25.5%
1992	461,259	7,041	1.6%	1,838,149	57,279	3.2%	25.1%
1993	468,675	7,416	1.6%	1,889,393	51,244	2.8%	24.8%
1994	471,402	2,727	0.6%	1,946,721	57,328	3.0%	24.2%
1995	473,666	2,264	0.5%	1,995,228	48,507	2.5%	23.7%
1996	478,028	4,362	0.9%	2,042,893	47,665	2.4%	23.4%
1997	479,151	1,123	0.2%	2,099,409	56,516	2.8%	22.8%
1998	477,061	-2,090	-0.4%	2,141,632	42,223	2.0%	22.3%
1999	475,974	-1,087	-0.2%	2,193,014	51,382	2.4%	21.7%
2000	475,269	-705	-0.1%	2,246,468	53,454	2.4%	21.2%
2001	477,801	2,532	0.5%	2,290,634	44,166	2.0%	20.9%
2002	481,143	3,342	0.7%	2,331,826	41,192	1.8%	20.6%
2003	486,938	5,795	1.2%	2,372,458	40,632	1.7%	20.5%
2004	495,682	8,744	1.8%	2,430,223	57,765	2.4%	20.4%
2005	510,012	14,330	2.9%	2,505,843	75,620	3.1%	20.4%
2006	525,660	15,648	3.1%	2,576,229	70,386	2.8%	20.4%
2007	537,653	11,993	2.3%	2,636,075	59,846	2.3%	20.4%
2008	551,013	13,360	2.5%	2,691,122	55,047	2.1%	20.5%
2009	563,273	12,260	2.2%	2,731,560	40,438	1.5%	20.6%
2010	576,335	13,062	2.3%	2,772,371	40,811	1.5%	20.8%
2011	587,745	11,410	2.0%	2,820,613	48,242	1.7%	20.8%
2012	600,985	13,240	2.3%	2,864,744	44,131	1.6%	21.0%
2013	612,551	11,566	1.9%	2,902,179	37,435	1.3%	21.1%
2014	622,182	9,631	1.6%	2,941,964	39,785	1.4%	21.1%
2015	633,896	11,714	1.9%	2,997,584	55,620	1.9%	21.1%
2016	644,476	10,580	1.7%	3,054,994	57,410	1.9%	21.1%
2017	652,347	7,871	1.2%	3,113,983	58,989	1.9%	20.9%
2018	659,438	7,091	1.1%	3,166,647	52,664	1.7%	20.8%
2019	667,403	7,965	1.2%	3,219,116	52,469	1.7%	20.7%
2020	666,609	-794	-0.1%	3,270,729	51,613	1.6%	20.4%
2021f	673,854	7,245	1.1%	3,326,920	56,191	1.7%	20.3%

Note: f = forecast
Source: Utah State Board of Education (enrollment counts). Interagency Common Data Committee (2021 enrollment forecast). State Population and 2021 Forecast: Pam Perlich, Ph.D., Demography Utah Population Committee (DUPC) Short-Term Projections for 2018-2028 and Kem C. Gardner Policy Institute, University of Utah.

Table 12.2: Fall Enrollment by District

	FY 2018 10/1/17	FY 2019 10/1/18	FY 2020 10/1/19	FY 2021 10/1/20	FY 2022f 10/1/21f	Total Annual Change				Percent Change				FY 2021 Rank		
						FY18-19	FY19-20	FY20-21	FY21-22f	FY18-19	FY19-20	FY20-21	FY21-22f	Size	Total Annual Change	Percent Change
Alpine	78,853	79,748	81,532	80,953	82,475	895	1,784	-579	1,522	1.1%	2.2%	-0.7%	1.9%	1	36	22%
Beaver	1,540	1,527	1,524	1,519	1,509	-13	-3	-5	-10	-0.8%	-0.2%	-0.3%	-0.7%	33	20	18%
Box Elder	11,671	11,770	11,914	11,832	11,969	99	144	-82	137	0.8%	1.2%	-0.7%	1.2%	14	26	21%
Cache	17,895	18,270	18,802	18,833	19,000	375	532	31	167	2.1%	2.9%	0.2%	0.9%	12	9	14%
Canyons	33,907	34,134	34,178	33,488	33,221	227	44	-690	-267	0.7%	0.1%	-2.0%	-0.8%	8	37	28%
Carbon	3,364	3,484	3,472	3,289	3,300	120	-12	-183	11	3.6%	-0.3%	-5.3%	0.3%	24	31	38%
Daggett	163	178	189	187	182	15	11	-2	-5	9.2%	6.2%	-1.1%	-2.7%	42	18	23%
Davis	71,908	72,263	72,897	70,643	71,963	355	634	-2,254	1,320	0.5%	0.9%	-3.1%	1.9%	3	41	31%
Duchesne	5,103	5,142	5,164	4,987	5,017	39	22	-177	30	0.8%	0.4%	-3.4%	0.6%	21	30	34%
Emery	2,184	2,181	2,141	2,172	2,152	-3	-40	31	-20	-0.1%	-1.8%	1.4%	-0.9%	31	9	9%
Garfield	909	899	899	923	927	-10	0	24	4	-1.1%	0.0%	2.7%	0.4%	37	11	7%
Grand	1,451	1,520	1,498	1,379	1,394	69	-22	-119	15	4.8%	-1.4%	-7.9%	1.1%	34	29	41%
Granite	66,024	64,281	63,989	61,851	60,299	-1,743	-292	-2,138	-1,552	-2.6%	-0.5%	-3.3%	-2.5%	4	40	33%
Iron	9,169	9,395	9,544	10,748	11,038	226	149	1,204	290	2.5%	1.6%	12.6%	2.7%	15	6	3%
Jordan	53,519	54,865	56,339	56,102	56,497	1,346	1,474	-237	395	2.5%	2.7%	-0.4%	0.7%	5	32	19%
Juab	2,510	2,587	2,655	2,590	2,641	77	68	-65	51	3.1%	2.6%	-2.4%	2.0%	29	24	29%
Kane	1,250	1,269	1,275	1,287	1,302	19	6	12	15	1.5%	0.5%	0.9%	1.2%	35	12	12%
Logan	5,555	5,569	5,420	5,484	5,400	14	-149	64	-84	0.3%	-2.7%	1.2%	-1.5%	20	7	11%
Millard	2,884	2,916	2,973	2,973	3,007	32	57	0	34	1.1%	2.0%	0.0%	1.1%	27	15	15%
Morgan	3,069	3,178	3,194	3,201	3,301	109	16	7	100	3.6%	0.5%	0.2%	3.1%	25	14	13%
Murray	6,416	6,264	6,425	6,097	6,054	-152	161	-328	-43	-2.4%	2.6%	-5.1%	-0.7%	19	34	37%
Nebo	32,809	33,117	33,379	35,335	34,831	308	262	1,956	-504	0.9%	0.8%	5.9%	-1.4%	7	2	4%

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Table 12.2 (Continued): Fall Enrollment by District

	FY 2018 10/1/17	FY 2019 10/1/18	FY 2020 10/1/19	FY 2021 10/1/20	FY 2022f 10/1/21f	Total Annual Change				Percent Change				FY 2021 Rank		
						FY18-19	FY19-20	FY20-21	FY21-22f	FY18-19	FY19-20	FY20-21	FY21-22f	Size	Total Annual Change	Percent Change
North Sanpete	2,438	2,471	2,507	2,445	2,474	33	36	-62	29	1.4%	1.5%	-2.5%	1.2%	30	23	30%
North Summit	1,048	1,044	1,014	1,011	1,006	-4	-30	-3	-5	-0.4%	-2.9%	-0.3%	-0.5%	36	19	17%
Ogden	11,736	11,553	11,460	10,617	10,568	-183	-93	-843	-49	-1.6%	-0.8%	-7.4%	-0.5%	16	38	40%
Park City	4,816	4,780	4,757	4,696	4,681	-36	-23	-61	-15	-0.7%	-0.5%	-1.3%	-0.3%	22	22	25%
Piute	274	273	279	291	289		6	12	-2	-0.4%	2.2%	4.3%	-0.7%	40	12	6%
Provo	15,991	16,165	16,603	13,317	13,715	174	438	-3,286	398	1.1%	2.7%	-19.8%	3.0%	13	42	42%
Rich	494	507	498	498	496	13	-9	0	-2	2.6%	-1.8%	0.0%	-0.4%	38	15	15%
Salt Lake	22,845	22,401	22,017	20,536	21,217	-444	-384	-1,481	681	-1.9%	-1.7%	-6.7%	3.3%	11	39	39%
San Juan	2,889	2,876	2,891	2,929	2,904	-13	15	38	-25	-0.4%	0.5%	1.3%	-0.9%	28	8	10%
Sevier	4,560	4,538	4,548	4,461	4,470	-22	10	-87	9	-0.5%	0.2%	-1.9%	0.2%	23	27	27%
South Sanpete	3,263	3,268	3,230	3,127	3,154	5	-38	-103	27	0.2%	-1.2%	-3.2%	0.9%	26	28	32%
South Summit	1,650	1,694	1,701	1,635	1,688	44	7	-66	53	2.7%	0.4%	-3.9%	3.2%	32	25	35%
Tintic	239	226	214	213	203	-13	-12		-10	-5.4%	-5.3%	-0.5%	-4.7%	41	17	20%
Tooele	16,154	16,903	17,608	22,004	23,360	749	705	4,396	1,356	4.6%	4.2%	25.0%	6.2%	10	1	2%
Uintah	6,986	7,069	6,989	6,668	6,590	83	-80	-321	-78	1.2%	-1.1%	-4.6%	-1.2%	18	33	36%
Wasatch	6,826	7,040	7,146	9,061	9,442	214	106	1,915	381	3.1%	1.5%	26.8%	4.2%	17	3	1%
Washington	30,015	31,074	33,884	35,346	36,485	1,059	2,810	1,462	1,139	3.5%	9.0%	4.3%	3.2%	6	5	5%
Wayne	447	444	436	429	422	-3	-8	-7	-7	-0.7%	-1.8%	-1.6%	-1.6%	39	21	26%
Weber	31,957	32,171	32,588	32,197	32,434	214	417	-391	237	0.7%	1.3%	-1.2%	0.7%	9	35	24%
Charter Schools	75,566	78,384	77,630	79,255	80,777	2,818	-754	1,625	1,522	3.7%	-1.0%	2.1%	1.9%	2	4	8%
State of Utah	652,347	659,438	667,403	666,609	673,854	7,091	7,965	-794	7,245	1.1%	1.2%	-0.1%	1.1%			

Source: Utah State Board of Education, Data and Statistics

Table 12.3: Utah Public Education Enrollment by Race and Ethnicity

	FY 2021 Enrollment	African American or Black		American Indian		Asian		Hispanic/Latino		Pacific Islander		Two or More Races		White	
	10/1/20	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
State of Utah	666,609	9,335	1.4%	6,702	1.0%	11,376	1.7%	119,522	17.9%	10,747	1.6%	20,681	3.1%	488,246	73.2%
Alpine	80,953	555	0.7%	238	0.3%	692	0.9%	10,205	12.6%	1,062	1.3%	3,238	4.0%	64,963	80.2%
Beaver	1,519	2	0.1%	8	0.5%	6	0.4%	262	17.2%	13	0.9%	22	1.4%	1,206	79.4%
Box Elder	11,832	42	0.4%	66	0.6%	49	0.4%	1,332	11.3%	47	0.4%	206	1.7%	10,090	85.3%
Cache	18,833	97	0.5%	137	0.7%	134	0.7%	1,888	10.0%	93	0.5%	379	2.0%	16,105	85.5%
Canyons	33,488	529	1.6%	112	0.3%	874	2.6%	5,691	17.0%	376	1.1%	1,780	5.3%	24,126	72.0%
Carbon	3,289	11	0.3%	29	0.9%	6	0.2%	445	13.5%	7	0.2%	36	1.1%	2,755	83.8%
Daggett	187	0	0.0%	2	1.1%	0	0.0%	9	4.8%	0	0.0%	4	2.1%	172	92.0%
Davis	70,643	798	1.1%	247	0.3%	800	1.1%	7,629	10.8%	892	1.3%	2,148	3.0%	58,129	82.3%
Duchesne	4,987	22	0.4%	317	6.4%	15	0.3%	482	9.7%	11	0.2%	190	3.8%	3,950	79.2%
Emery	2,172	4	0.2%	10	0.5%	1	0.0%	201	9.3%	0	0.0%	13	0.6%	1,943	89.5%
Garfield	923	2	0.2%	24	2.6%	2	0.2%	79	8.6%	2	0.2%	10	1.1%	804	87.1%
Grand	1,379	5	0.4%	69	5.0%	7	0.5%	276	20.0%	2	0.1%	24	1.7%	996	72.2%
Granite	61,851	2,395	3.9%	792	1.3%	2,723	4.4%	21,812	35.3%	2,825	4.6%	889	1.4%	30,415	49.2%
Iron	10,748	54	0.5%	200	1.9%	69	0.6%	1,196	11.1%	60	0.6%	243	2.3%	8,926	83.0%
Jordan	56,102	603	1.1%	188	0.3%	956	1.7%	9,293	16.6%	1,027	1.8%	2,483	4.4%	41,552	74.1%
Juab	2,590	9	0.3%	13	0.5%	10	0.4%	130	5.0%	6	0.2%	43	1.7%	2,379	91.9%
Kane	1,287	4	0.3%	24	1.9%	10	0.8%	74	5.7%	1	0.1%	24	1.9%	1,150	89.4%
Logan	5,484	143	2.6%	66	1.2%	150	2.7%	1,684	30.7%	99	1.8%	128	2.3%	3,214	58.6%
Millard	2,973	1	0.0%	30	1.0%	28	0.9%	475	16.0%	2	0.1%	56	1.9%	2,381	80.1%
Morgan	3,201	17	0.5%	8	0.2%	6	0.2%	86	2.7%	6	0.2%	49	1.5%	3,029	94.6%
Murray	6,097	210	3.4%	43	0.7%	128	2.1%	1,244	20.4%	55	0.9%	303	5.0%	4,114	67.5%
Nebo	35,335	194	0.5%	94	0.3%	103	0.3%	4,710	13.3%	252	0.7%	1,095	3.1%	28,887	81.8%

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Table 12.3 (Continued): Utah Public Education Enrollment by Race and Ethnicity

	FY 2021 Enrollment	African American or Black		American Indian		Asian		Hispanic/Latino		Pacific Islander		Two or More Races		White	
	10/1/20	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
North Sanpete	2,445	4	0.2%	23	0.9%	2	0.1%	417	17.1%	13	0.5%	44	1.8%	1,942	79.4%
North Summit	1,011	2	0.2%	4	0.4%	0	0.0%	162	16.0%	0	0.0%	8	0.8%	835	82.6%
Ogden	10,617	208	2.0%	89	0.8%	71	0.7%	5,407	50.9%	52	0.5%	315	3.0%	4,475	42.1%
Park City	4,696	26	0.6%	3	0.1%	83	1.8%	967	20.6%	3	0.1%	142	3.0%	3,472	73.9%
Piute	291	3	1.0%	1	0.3%	0	0.0%	38	13.1%	0	0.0%	4	1.4%	245	84.2%
Provo	13,317	147	1.1%	105	0.8%	250	1.9%	3,982	29.9%	474	3.6%	550	4.1%	7,809	58.6%
Rich	498	0	0.0%	0	0.0%	0	0.0%	20	4.0%	1	0.2%	12	2.4%	465	93.4%
Salt Lake	20,536	1,021	5.0%	317	1.5%	944	4.6%	7,517	36.6%	1,035	5.0%	787	3.8%	8,915	43.4%
San Juan	2,929	9	0.3%	1,608	54.9%	5	0.2%	170	5.8%	1	0.0%	66	2.3%	1,070	36.5%
Sevier	4,461	38	0.9%	84	1.9%	9	0.2%	221	5.0%	37	0.8%	0	0.0%	4,072	91.3%
South Sanpete	3,127	17	0.5%	17	0.5%	5	0.2%	414	13.2%	31	1.0%	62	2.0%	2,581	82.5%
South Summit	1,635	2	0.1%	4	0.2%	1	0.1%	211	12.9%	1	0.1%	12	0.7%	1,404	85.9%
Tintic	213	2	0.9%	2	0.9%	1	0.5%	14	6.6%	0	0.0%	5	2.3%	189	88.7%
Tooele	22,004	158	0.7%	138	0.6%	118	0.5%	2,742	12.5%	227	1.0%	448	2.0%	18,173	82.6%
Uintah	6,668	26	0.4%	554	8.3%	29	0.4%	662	9.9%	31	0.5%	157	2.4%	5,209	78.1%
Wasatch	9,061	33	0.4%	18	0.2%	39	0.4%	1,519	16.8%	22	0.2%	199	2.2%	7,231	79.8%
Washington	35,346	361	1.0%	452	1.3%	329	0.9%	5,155	14.6%	528	1.5%	672	1.9%	27,849	78.8%
Wayne	429	2	0.5%	3	0.7%	5	1.2%	30	7.0%	2	0.5%	11	2.6%	376	87.6%
Weber	32,197	286	0.9%	104	0.3%	301	0.9%	4,205	13.1%	221	0.7%	903	2.8%	26,177	81.3%
Charter Schools	79,255	1,293	1.6%	459	0.6%	2,415	3.0%	16,466	20.8%	1,230	1.6%	2,921	3.7%	54,471	68.7%

Source: Utah State Board of Education, Data and Statistics

Table 12.4: Statewide Selected Data, FY 2020

School District	FY20 Per Pupil Current Expenditures	Rank	Class of 2020 Graduation Rate	Rank	FY20 Pupil-Teacher Ratio	Rank	FY20 Share of Free and Reduced Students	Rank
State of Utah	$8,506		88%		21.6		32.1%	
Alpine	7,884	38	93%	11	24.9	2	21.5%	37
Beaver	10,890	15	92%	17	19.1	25	43.7%	13
Box Elder	8,704	29	81%	35	21.7	12	32.6%	29
Cache	8,311	32	95%	6	23.4	4	24.8%	34
Canyons	9,223	26	90%	20	21.8	11	27.2%	33
Carbon	10,564	16	87%	28	19.1	26	43.0%	14
Daggett	20,788	1	93%	11	11.4	40	22.5%	36
Davis	8,074	34	94%	8	23.6	3	20.7%	38
Duchesne	9,312	25	81%	35	19.5	21	39.4%	18
Emery	12,486	9	85%	29	17.2	32	48.0%	9
Garfield	12,457	10	95%	6	15.4	36	44.6%	11
Grand	12,095	12	85%	29	15.7	35	35.4%	24
Granite	9,336	24	76%	42	21.5	13	47.0%	10
Iron	8,585	31	88%	26	21.1	15	41.3%	17
Jordan	7,959	37	90%	20	22.2	10	19.5%	39
Juab	8,695	30	98%	3	22.5	9	36.4%	23
Kane	12,741	8	96%	4	18.4	30	38.6%	19
Logan	9,385	23	79%	40	19.8	20	54.6%	6
Millard	11,268	13	96%	4	19.0	28	50.0%	7
Morgan	7,372	41	93%	11	21.1	16	11.8%	42
Murray	8,721	28	80%	39	21.0	18	33.2%	27
Nebo	7,724	39	94%	8	22.9	7	27.6%	32
No. Sanpete	9,846	20	79%	40	21.1	17	55.2%	5
No. Summit	12,247	11	88%	26	17.0	33	23.1%	35
Ogden	9,660	21	82%	33	19.2	24	72.5%	2
Park City	14,519	7	93%	11	15.3	37	17.4%	41
Piute	19,136	3	90%	20	10.7	42	61.2%	3
Provo	8,309	33	89%	24	23.0	6	42.0%	16
Rich	16,602	4	100%	1	14.4	38	37.7%	21
Salt Lake	10,564	16	81%	35	19.3	23	55.7%	4
San Juan	14,570	6	92%	17	16.3	34	72.8%	1
Sevier	9,154	27	85%	29	20.6	19	42.4%	15
So. Sanpete	11,164	14	93%	11	19.3	22	48.3%	8
So. Summit	10,317	19	94%	8	18.0	31	17.9%	40
Tintic	20,122	2	91%	19	10.9	41	33.7%	25
Tooele	8,068	35	81%	35	25.2	1	33.4%	26
Uintah	9,413	22	82%	33	23.2	5	44.4%	12
Wasatch	10,538	18	90%	20	19.0	27	28.6%	30
Washington	7,602	40	93%	11	22.5	8	38.6%	19
Wayne	14,926	5	100%	1	13.9	39	37.3%	22
Weber	8,041	36	89%	24	21.3	14	28.3%	31
Charter Schools	7,343	42	84%	32	19.0	29	33.0%	28

Source: Utah State Board of Education, School Finance (Expenditures); Utah State Board of Education, Data and Statistics (Graduation Rate, Pupil-Teacher Ratio); Utah State Board of Education, Child Nutrition Programs (Free & reduced students include directly certified, categorically certified, and income-based National School Lunch Program School Meal applications based on October Survey, 2019).

Table 12.5: College Entrance Exam Scores

Average ACT Scores by State: 2020

	% of Graduates Tested	Average English Score	Average Mathematic Score	Average Reading Score	Average Science Score	Average Composite Score	Rank
United States	49%	19.9	20.2	21.2	20.6	20.6	
Alabama	100%	18.5	18.1	19.3	18.8	18.8	44
Alaska	33%	18.8	20.0	21.0	20.1	20.1	32
Arizona	71%	18.0	19.3	19.5	19.1	19.1	42
Arkansas	100%	18.7	18.4	19.4	19.1	19.0	43
California	19%	23.1	22.9	23.8	22.8	23.3	15
Colorado	25%	23.6	23.1	24.4	23.4	23.7	13
Connecticut	19%	26.3	25.1	26.5	25.3	25.9	2
Delaware	11%	24.4	23.2	25.1	23.7	24.2	11
District of Columbia	33%	23.2	22.3	23.9	22.6	23.1	17
Florida	46%	20.1	19.8	21.7	20.2	20.6	28
Georgia	43%	21.3	21.0	22.5	21.6	21.7	21
Hawaii	82%	17.2	18.6	19.1	18.7	18.5	48
Idaho	28%	22.1	21.9	23.8	22.4	22.7	19
Illinois	31%	24.9	24.1	25.1	24.1	24.7	7
Indiana	25%	21.9	22.4	23.3	22.2	22.6	20
Iowa	68%	20.1	20.5	22.0	21.3	21.1	24
Kansas	82%	19.5	20.0	21.0	20.4	20.4	29
Kentucky	100%	18.9	19.0	20.1	19.6	19.5	39
Louisiana	100%	18.3	18.1	19.1	18.9	18.7	46
Maine	5%	25.0	24.0	25.8	24.2	24.9	4
Maryland	19%	23.7	22.9	24.6	23.4	23.8	12
Massachusetts	18%	26.0	25.6	26.6	25.4	26.0	1
Michigan	17%	24.6	24.1	25.0	24.1	24.6	8
Minnesota	92%	20.0	21.3	21.8	21.5	21.3	23
Mississippi	100%	17.8	17.7	18.5	18.4	18.2	50
Missouri	78%	20.1	20.1	21.3	20.8	20.7	27
Montana	100%	18.7	19.8	20.4	20.0	19.9	34
Nebraska	100%	19.2	19.7	20.2	20.0	19.9	34
Nevada	100%	16.7	18.0	18.3	18.1	17.9	51
New Hampshire	12%	25.7	25.2	26.2	25.3	25.7	3
New Jersey	23%	24.5	24.0	24.7	23.7	24.4	9
New Mexico	56%	18.1	18.8	20.1	19.6	19.3	40
New York	20%	24.5	24.5	25.4	24.6	24.9	4
North Carolina	100%	17.3	18.9	19.5	18.9	18.8	44
North Dakota	94%	18.2	19.6	20.1	20.1	19.6	38
Ohio	100%	18.8	19.8	20.4	20.0	19.9	34
Oklahoma	100%	17.9	18.0	19.5	18.9	18.7	46
Oregon	42%	20.0	20.6	21.9	20.8	21.0	25
Pennsylvania	15%	23.4	23.2	24.3	23.4	23.7	13
Rhode Island	11%	25.1	23.9	25.7	24.1	24.8	6
South Carolina	76%	17.3	18.3	19.0	18.6	18.4	49
South Dakota	70%	20.7	21.5	22.4	21.9	21.7	21
Tennessee	100%	19.1	18.7	19.6	19.1	19.3	40
Texas	38%	19.1	20.1	20.8	20.4	20.2	30
Utah	100%	19.3	19.7	21.0	20.3	20.2	30
Vermont	23%	23.0	22.4	24.5	23.0	23.3	15
Virginia	19%	24.2	23.5	25.2	24.0	24.4	9
Washington	20%	22.2	22.5	23.7	22.6	22.9	18
West Virginia	38%	20.6	19.8	21.8	20.9	20.9	26
Wisconsin	100%	19.1	19.9	20.5	20.3	20.1	32
Wyoming	100%	18.6	19.3	20.2	20.0	19.7	37

Source: ACT

Table 12.6: Selected Data by State, FY 2017

	Fall 2016 Enrollment	2016-17 Current Expenditures (Thousands)	2016-17 Current Expenditures Per Pupil	Rank	CY 2017 Personal Income (Millions)	Current Exp as % of Personal Income	Rank	Fall 2016 Pupil/ Teacher Ratio	Rank
United States	50,615,189	$619,164,572	$12,258	-	$16,937,582	3.7%	-	16.0	..
Alabama	744,930	7,097,472	9,528	41	200,000	3.5%	32	17.5	43
Alaska	132,737	2,367,707	17,838	6	42,454	5.6%	1	17.0	40
Arizona	1,123,137	8,966,684	8,053	48	300,007	3.0%	49	23.3	51
Arkansas	493,447	4,936,465	10,004	37	125,026	3.9%	16	13.8	15
California	6,309,138	76,663,731	12,151	21	2,383,131	3.2%	41	23.3	50
Colorado	905,019	8,913,931	9,849	39	312,045	2.9%	50	17.4	41
Connecticut	535,118	10,664,567	19,929	3	256,349	4.2%	12	12.6	7
Delaware	136,264	2,029,229	14,892	14	48,604	4.2%	10	14.8	24
District of Columbia	85,850	1,936,852	22,561	2	55,051	3.5%	34	12.8	8
Florida	2,816,791	26,404,135	9,374	43	1,016,819	2.6%	51	15.1	26
Georgia	1,764,346	18,126,272	10,274	34	467,359	3.9%	19	15.4	30
Hawaii	181,550	2,600,074	14,322	16	76,110	3.4%	38	15.4	31
Idaho	297,200	2,245,167	7,554	50	72,605	3.1%	44	18.3	45
Illinois	2,026,718	31,449,028	15,517	12	693,274	4.5%	7	15.7	35
Indiana	1,049,547	10,309,827	9,823	40	301,238	3.4%	37	17.4	42
Iowa	509,831	5,840,808	11,456	27	149,732	3.9%	18	14.2	21
Kansas	494,347	5,154,894	10,428	32	142,186	3.6%	28	13.7	14
Kentucky	684,017	6,897,155	10,083	36	182,116	3.8%	23	16.3	37
Louisiana	716,293	8,150,463	11,379	28	205,188	4.0%	15	14.8	23
Maine	180,512	2,641,420	14,633	15	62,146	4.3%	9	12.2	4
Maryland	886,221	13,233,589	14,933	13	365,998	3.6%	30	14.8	25
Massachusetts	964,514	17,089,142	17,718	7	469,501	3.6%	27	13.3	11
Michigan	1,528,666	17,206,122	11,256	29	458,247	3.8%	24	18.3	44
Minnesota	875,021	11,056,128	12,635	19	305,921	3.6%	31	15.4	32
Mississippi	483,150	4,229,767	8,755	47	109,190	3.9%	20	15.1	27
Missouri	915,040	9,776,478	10,684	31	276,888	3.5%	33	13.5	12
Montana	146,375	1,688,944	11,538	26	48,623	3.5%	35	13.9	16
Nebraska	319,194	4,041,479	12,662	18	97,032	4.2%	11	13.5	13
Nevada	473,744	4,320,504	9,120	45	141,516	3.1%	46	20.0	47
New Hampshire	180,888	2,886,649	15,958	10	79,253	3.6%	26	12.3	5
New Jersey	1,410,421	27,622,861	19,585	4	577,408	4.8%	3	12.2	3
New Mexico	336,263	3,345,338	9,949	38	83,142	4.0%	13	15.8	36
New York	2,729,776	60,905,055	22,861	1	1,289,263	4.7%	5	13.1	9
North Carolina	1,550,062	13,943,070	8,995	46	455,997	3.1%	45	15.5	33
North Dakota	109,706	1,510,292	13,767	17	39,813	3.8%	21	11.8	2
Ohio	1,710,143	21,494,254	12,569	20	546,006	3.9%	17	16.7	38
Oklahoma	693,903	5,496,402	7,921	49	172,170	3.2%	42	16.9	39
Oregon	606,277	6,514,334	11,252	30	202,052	3.2%	40	20.4	48
Pennsylvania	1,727,497	27,263,106	15,782	11	681,659	4.0%	14	14.1	19
Rhode Island	142,150	2,362,463	16,620	8	55,575	4.3%	8	13.3	10
South Carolina	771,250	8,035,426	10,419	33	212,034	3.8%	22	15.2	28
South Dakota	136,302	1,379,026	10,117	35	43,457	3.2%	43	13.9	17
Tennessee	1,001,562	9,260,615	9,246	44	303,461	3.1%	47	15.6	34
Texas	5,360,849	51,033,537	9,520	42	1,369,329	3.7%	25	15.2	29
Utah	659,801	4,754,714	7,206	51	136,997	3.5%	36	22.9	49
Vermont	88,428	1,722,621	19,480	5	32,277	5.3%	2	10.8	1
Virginia	1,287,026	15,296,646	11,885	24	470,836	3.2%	39	14.0	18
Washington	1,101,711	13,188,097	11,971	22	433,796	3.0%	48	18.7	46
West Virginia	273,855	3,216,323	11,745	25	70,730	4.5%	6	14.1	20
Wisconsin	864,432	10,340,697	11,962	23	285,250	3.6%	29	14.6	22
Wyoming	94,170	1,555,016	16,513	9	32,724	4.8%	4	12.5	6

Source: National Center for Education Statistics, Digest of Education Statistics
Bureau of Economic Analysis (personal income)

Higher Education

13

Trisha Dugovic, Utah System of Higher Education
Carrie Mayne, Utah System of Higher Education

2020 OVERVIEW

Higher education constitutes one of the most significant influences to the state's economy, consistently producing the labor supply powering the strong economic momentum of the 2010 decade. As we move into the next decade, the institutions of Utah's System of Higher Education (USHE) are poised to continue supporting the state's growth, with enrollment projected to expand at roughly 3% per year over the next 10 years.

During the 2020 Legislative Session, the Legislature passed S.B. 111, *Higher Education Amendments*, which merged the Utah System of Higher Education and the Utah System of Technical Colleges into one system. Beginning July 1, 2020, Utah's two systems of postsecondary education combined as the joint Utah System of Higher Education, overseen by a single governing Board, the Utah Board of Higher Education. The Utah System of Higher Education is now comprised of eight technical colleges, two community colleges, four regional universities, and two research universities.

Enrollments and Completions

Utah's public degree-granting colleges and universities enrolled approximately 4,800 fewer students in Fall Semester 2020 for a net decrease of 2.5% from Fall 2019. Collectively, Utah's public colleges and universities enroll nearly 190,000 students each academic year. Despite the current downturn, USHE's enrollment growth at degree-granting institutions is expected to outpace the country, with an anticipated 57,000 additional students enrolling in USHE schools over the next 10 years.

USHE colleges and universities issued 44,031 certificates and degrees to the class of 2019, a 14.0%% increase over the prior year. Certificates grew at the fastest rate as institutions expanded offerings and employed general education certificates as a tool for increasing *stackability* in educational pathways.

Utah's eight technical colleges enrolled 14,280 students in certificate seeking programs during fiscal year 2020, an increase of 4.4% over fiscal year 2019. An additional 9,831 secondary students enrolled in technical education during the 2020 fiscal year.

Technical college students earned 6,333 certificates in fiscal year 2020. The most common certificates were in the fields of certified nurse's assistants, licensed practical nurses, cosmetology, welding, and medical/clinical assistants. These five fields comprised 27.0% of the total certificate volume for the technical colleges.

COVID-19

The coronavirus pandemic that spread throughout the world in 2020 affected students, faculty, staff and all facets of higher education in the state of Utah. Data on enrollments and completions in the previous section exhibit just some impacts resulting from employing temporary adaptive measures in the name of slowing the spread of COVID-19 among Utah college populations.

Institutional changes employed to cope with the pandemic include alternatives to standardized test scores as part of admissions and USHE scholarship criteria, as well as delayed tuition increases among some higher education institutions.

In support of economic recovery from the effects of COVID-19, USHE received $13 million in Coronavirus Aid, Relief, and Economic Security (CARES) Act funds which were allocated across the system to support students receiving training in high demand fields. Over the last five months of the year, 5,640 students enrolled in training programs supported by the CARES Act funds.

USHE's New Attainment Goal

In the 2018 Legislative Session, H.B. 300, *Higher Education Modifications*, established the Higher Education Strategic Planning Commission. In

January 2020, the commission created a workgroup led by the Office of the Commissioner of Higher Education to formulate a new statewide educational attainment goal informed by forecasts of the future economic and workforce needs of the state. The workgroup, consisting of representatives from higher education institutions, industry, the Office of the Governor, and other government agencies, met to discuss the lessons learned from the previous attainment goal, how to shape the new attainment goal to guide institutions in the direction of Utah's changing workforce needs, and the appropriate data needed to measure progress toward the goal.

The attainment goal workgroup recommended focusing on the quality of the higher education system, using measureable goals that accurately reflect the efficiency and efficacy of the full expanse of the education experience, beginning with pipeline entry and ending with the transition to workforce. To that end, three quantifiable goals were identified:

- Access—increase the 3-year college going rate of high school graduates by 10% in 10 years
- Timely Completion—increase the share of degrees and awards completed within 150% of expected time by 10% in 10 years
- High-Yield Awards—increase the share of degrees and awards that align with Utah's high-wage, high-demand occupations by 20% in 10 years

In 2021, USHE will gather baseline data and prepare to track system progress toward the goals over the next decade, including institution-specific contributions toward goal progress.

Strategic Planning for a Newly Merged Higher Education System

In accordance with the aforementioned S.B. 111, *Higher Education Amendments* of 2020, USHE drafted an organizational mission, vision, values and principles, as well as priorities, to guide the Utah Board of Higher Education in developing a five-year strategic plan. The system-wide strategy will emphasize legislatively outlined areas of focus, including quality; affordability; educational opportunity, access, equity, and completion; workforce alignment and preparation for high-quality jobs; and economic growth.

System priorities that support the statewide attainment goals include:

- Access
- Completion
- Affordability
- Workforce Alignment & Economic Impact

Equity, Diversity, and Inclusion

Utah's colleges and universities have long been engaged on issues of equity, diversity, and inclusion. Given recent events highlighting the country's struggle with racial inequities in 2020, USHE recognized its responsibility to continue facilitating dialogue and prompting action between state leaders, researchers, and industry experts on educational equity gaps to ensure all Utahns can access higher education and contribute to the overall state workforce.

Utah population projections predict an increase in demographic diversity in the coming decades. By 2065, the percentage of people of color in Utah, ages 18-35, will nearly double. Currently, disparities already exist in postsecondary education enrollment and completions at USHE's institutions. Without intentional and significant changes to address growing disparities within USHE, the attainment gap at Utah's postsecondary colleges and universities will continue to increase as the population grows.

2021 OUTLOOK

COVID-19 will continue to dictate the focus for Utah's higher education institutions with the arrival of 2021. COVID-19 testing, social distancing, and vaccine distribution will drive the institutions' and students' abilities to continue the education process.

With an eye toward a future where the pandemic is successfully contained, USHE's focus will be on driving economic success in our state through strategies focused in the areas outlined by the statewide attainment goals and the Board of Higher Education's Strategic Plan. Multi-dimensional strategies will be used to increase the system's positive contribution to workforce development with a specific focus on closing equity gaps that inhibit the full realization of our state's workforce and economic potential.

Table 13.1: Utah System of Higher Education Enrollments and State of Utah Population

Year	Fall Enrollment	Annual Change		Estimated State Pop.	Annual Change		Enrollment/ Population
		Absolute	Percent		Absolute	Percent	
1980	61,115	3,474	6.0%	1,474,000	58,050	4.1%	4.1%
1981	63,090	1,975	3.2%	1,515,000	41,000	2.8%	4.2%
1982	67,056	3,966	6.3%	1,558,000	43,000	2.8%	4.3%
1983	69,579	2,523	3.8%	1,595,000	37,000	2.4%	4.4%
1984	69,212	-367	-0.5%	1,622,000	27,000	1.7%	4.3%
1985	70,615	1,403	2.0%	1,643,000	21,000	1.3%	4.3%
1986	72,674	2,059	2.9%	1,663,000	20,000	1.2%	4.4%
1987	73,088	414	0.6%	1,678,000	15,000	0.9%	4.4%
1988	74,929	1,841	2.5%	1,690,000	12,000	0.7%	4.4%
1989	74,884	-45	-0.1%	1,706,000	16,000	0.9%	4.4%
1990	80,430	5,546	7.4%	1,729,227	23,227	1.4%	4.7%
1991	86,843	6,413	8.0%	1,780,870	51,643	3.0%	4.9%
1992	94,923	8,080	9.3%	1,838,149	57,279	3.2%	5.2%
1993	99,163	4,240	4.5%	1,889,393	51,244	2.8%	5.2%
1994	103,633	4,470	4.5%	1,946,721	57,328	3.0%	5.3%
1995	110,594	6,961	6.7%	1,995,228	48,507	2.5%	5.5%
1996	112,666	2,072	1.9%	2,042,893	47,665	2.4%	5.5%
1997	116,047	3,381	3.0%	2,099,409	56,516	2.8%	5.5%
1998	129,755	13,708	11.8%	2,141,632	42,223	2.0%	6.1%
1999	139,249	9,494	7.3%	2,193,014	51,382	2.4%	6.3%
2000	142,116	2,867	2.1%	2,246,468	53,539	2.4%	6.3%
2001	155,539	13,423	9.4%	2,290,634	44,166	2.0%	6.8%
2002	154,192	-1,347	-0.9%	2,331,826	41,192	1.8%	6.6%
2003	156,162	1,970	1.3%	2,372,458	40,632	1.7%	6.6%
2004	162,553	6,391	4.1%	2,430,223	57,765	2.4%	6.7%
2005	160,316	-2,237	-1.4%	2,505,843	75,620	3.1%	6.4%
2006	157,837	-2,479	-1.5%	2,576,229	70,386	2.8%	6.1%
2007	158,382	545	0.3%	2,636,075	59,846	2.3%	6.0%
2008	163,627	5,245	3.3%	2,691,122	55,047	2.1%	6.1%
2009	175,880	12,253	7.5%	2,731,560	40,438	1.5%	6.4%
2010	179,894	4,014	2.3%	2,772,371	40,811	1.5%	6.5%
2011	179,965	71	0.0%	2,820,613	48,242	1.7%	6.4%
2012	179,871	-94	-0.1%	2,864,744	44,131	1.6%	6.3%
2013	177,688	-2,183	-1.2%	2,902,179	37,435	1.3%	6.1%
2014	174,010	-3,678	-2.1%	2,941,964	39,785	1.4%	5.9%
2015	175,138	1,128	0.6%	2,997,584	55,620	1.9%	5.8%
2016	179,935	4,797	2.7%	3,054,994	57,410	1.9%	5.9%
2017	186,161	6,226	3.5%	3,113,983	58,989	1.9%	6.0%
2018	189,179	3,018	1.6%	3,166,666	45,132	1.4%	6.0%
2019	193,863	4,684	2.5%	3,220,262	53,596	1.7%	6.0%
2020	189,021	-4,842	-2.5%	3,273,000	52,738	1.6%	5.8%

Source: Utah System of Higher Education, Utah Population Committee
Note: Enrollment figures prior to 1998 sourced from Fall term 3rd week enumeration. Thereafter, enrollment figures are sourced from Fall end of term enumeration.

Table 13.2: Utah System of Higher Education Enrollment by County

County	Fall 2016	Fall 2017	Fall 2018	Fall 2019	Fall 2020	Total Annual Change				Percent Change			
						2016 to 2017	2017 to 2018	2018 to 2019	2019 to 2020	2016 to 2017	2017 to 2018	2018 to 2019	2019 to 2020
Beaver	302	318	313	280	349	16	-5	-33	69	5.3%	-1.6%	-10.5%	24.6%
Box Elder	1,769	1,704	1,622	1,492	2,100	-65	-82	-130	608	-3.7%	-4.8%	-8.0%	40.8%
Cache	4,666	4,336	3,943	3,570	6,308	-330	-393	-373	2,738	-7.1%	-9.1%	-9.5%	76.7%
Carbon	665	581	525	402	850	-84	-56	-123	448	-12.6%	-9.6%	-23.4%	111.4%
Daggett	27	28	28	30	30	1	0	2	0	3.7%	0.0%	7.1%	0.0%
Davis	18,314	18,825	19,211	19,750	21,418	511	386	539	1,668	2.8%	2.1%	2.8%	8.4%
Duchesne	463	413	456	423	599	-50	43	-33	176	-10.8%	10.4%	-7.2%	41.6%
Emery	359	332	365	320	540	-27	33	-45	220	-7.5%	9.9%	-12.3%	68.8%
Garfield	223	211	208	184	202	-12	-3	-24	18	-5.4%	-1.4%	-11.5%	9.8%
Grand	212	195	199	185	285	-17	4	-14	100	-8.0%	2.1%	-7.0%	54.1%
Iron	2,736	2,617	2,429	2,426	2,477	-119	-188	-3	51	-4.3%	-7.2%	-0.1%	2.1%
Juab	539	544	554	511	530	5	10	-43	19	0.9%	1.8%	-7.8%	3.7%
Kane	265	275	296	323	348	10	21	27	25	3.8%	7.6%	9.1%	7.7%
Millard	621	662	641	656	658	41	-21	15	2	6.6%	-3.2%	2.3%	0.3%
Morgan	582	569	604	642	714	-13	35	38	72	-2.2%	6.2%	6.3%	11.2%
Piute	64	60	81	80	73	-4	21		-7	-6.3%	35.0%	-1.2%	-8.8%
Rich	97	98	103	77	124	1	5	-26	47	1.0%	5.1%	-25.2%	61.0%
Salt Lake	47,805	48,680	48,166	48,150	48,420	875	-514	-16	270	1.8%	-1.1%	-0.0%	0.6%
San Juan	496	472	450	367	553	-24	-22	-83	186	-4.8%	-4.7%	-18.4%	50.7%
Sanpete	1,401	1,447	1,545	1,486	1,645	46	98	-59	159	3.3%	6.8%	-3.8%	10.7%
Sevier	979	1,100	1,153	1,183	1,180	121	53	30	-3	12.4%	4.8%	2.6%	-0.3%
Summit	1,494	1,767	1,862	1,922	2,082	273	95	60	160	18.3%	5.4%	3.2%	8.3%
Tooele	2,169	2,116	2,084	1,946	2,602	-53	-32	-138	656	-2.4%	-1.5%	-6.6%	33.7%
Uintah	535	527	574	490	861	-8	47	-84	371	-1.5%	8.9%	-14.6%	75.7%
Utah	25,175	29,946	31,281	32,402	34,044	4,771	1,335	1,121	1,642	19.0%	4.5%	3.6%	5.1%
Wasatch	1,371	1,575	1,783	1,741	1,837	204	208	-42	96	14.9%	13.2%	-2.4%	5.5%
Washington	6,570	6,902	7,138	7,821	8,267	332	236	683	446	5.1%	3.4%	9.6%	5.7%
Wayne	121	108	121	103	96	-13	13	-18	-7	-10.7%	12.0%	-14.9%	-6.8%
Weber	10,608	10,900	10,690	11,039	11,464	292	-210	349	425	2.8%	-1.9%	3.3%	3.8%
Other US Locations	22,747	26,729	28,022	28,264	29,611	3,982	1,293	242	1,347	17.5%	4.8%	0.9%	4.8%
Foreign Locations	7,683	5,648	5,503	5,832	5,167	-2,035	-145	329	-665	-26.5%	-2.6%	6.0%	-11.4%
Unknown/ Unidentified	14,107	10,349	11,999	15,254	3,587	-3,758	1,650	3,255	-11,667	-26.6%	15.9%	27.1%	-76.5%
Total	175,165	180,034	183,949	189,351	189,021	4,869	3,915	5,402	-330	2.8%	2.2%	2.9%	-0.2%

Source: Utah System of Higher Education

Table 13.3: Degrees and Awards by Race/Ethnicity at Degree-Granting Public Institutions in Utah: Academic Year 2019–2020

USHE Institution	Total Degrees Awarded	American Indian or Alaskan Native	Asian	Black or African American	Hispanic or Latino	Native Hawaiian or Pacific Islander	Non-resident Alien	Two or more races	White	Race/ Ethnicity Not Specified
University of Utah	9,147	33	484	114	919	31	712	420	6,164	270
Utah State University	7,128	110	107	47	400	22	132	136	5,886	288
Weber State University	5,782	14	112	63	581	23	102	186	4,351	350
Southern Utah University	3,027	31	52	62	196	33	100	22	2,419	112
Snow College	1,434	14	7	11	80	21	41	13	1,245	2
Dixie State University	2,538	16	32	41	276	0	60	55	2,010	48
Utah Valley State College	9,917	26	180	73	956	45	105	306	8,097	129
Salt Lake Community College	5,058	40	236	76	893	33	78	161	3,490	51
Total	44,031	284	1,210	487	4,301	208	1,330	1,299	33,662	1,250
Percent of Total		0.6%	2.7%	1.1%	9.8%	0.5%	3.0%	3.0%	76.5%	2.8%

Note: Does not include data from the Utah System of Technical Colleges (USTC). Institutions are sorted by the type of institution and the year they were founded.
Source: Utah System of Higher Education

Table 13.4: Full Cost Study Summary (Appropriated Funds Only), 2018–2019

USHE Institution	Founded	Direct Cost of Instruction	Full Cost of Instruction	E & G FTE Students 2016–17	Student/ Faculty Ratio	Direct Cost of Instruction per FTE	Full Cost of Instruction per FTE
University of Utah[1]	1850	$266,871,472	$446,002,429	$28,399	16.7	$9,397	$15,705
Utah State University	1888	$179,114,051	$283,105,238	$21,518	20.9	$8,324	$13,157
Weber State University	1889	$72,386,176	$141,983,118	$14,476	17.3	$5,000	$9,808
Southern Utah University	1897	$31,072,399	$72,126,422	$7,385	20.5	$4,207	$9,766
Snow College[2]	1888	$14,717,619	$33,362,270	$4,136	18.2	$3,558	$8,066
Dixie State University	1911	$25,549,274	$58,353,569	$6,699	16.2	$3,814	$8,711
Utah Valley University	1941	$108,899,390	$238,443,168	$23,243	20.5	$4,685	$10,259
Salt Lake Community College[3]	1947	$66,631,099	$139,461,451	$14,963	17.7	$4,453	$9,320
Total		$765,241,480	$1,412,837,665	$120,820	18.3	$6,352	$11,747

Note: FTE = Full-Time Equivalent, E&G = Education and General Fund
Institutions are sorted by the type of institution and the year they were founded.
1 Does not include the School of Medicine and the Regional Dental Education Program
2 Does not include Applied Technology Education
3 Does not include the School of Applied Technology
Source: Utah System of Higher Education

Table 13.5: USHE Summary of Tuition and Fees by Institution

USHE Institution	2002–03	2003–04	2004–05	2005–06	2006–07	2007–08	2008–09	2009–10	2010–11	2011–12	2012–13	2013–14	2014–15	2015–16	2016–17	2017–18	2018–19	2019-20	2019-20
University of Utah																			
Resident	$3,325	$3,646	$4,000	$4,298	$4,663	$4,987	$5,287	$5,746	$6,274	$6,763	$7,139	$7,457	$7,876	$8,197	$8,518	$8,824	$9,222	$9,500	$9,500
Nonresident	$10,182	$11,292	$12,410	$13,370	$14,593	$15,662	$16,600	$18,136	$19,841	$21,388	$22,642	$24,019	$25,208	$26,022	$27,039	$28,067	$29,215	$30,134	$30,134
Utah State University																			
Resident	$2,834	$3,071	$3,247	$3,615	$3,949	$4,199	$4,274	$4,828	$5,150	$5,563	$5,931	$6,185	$6,383	$6,664	$6,866	$7,175	$7,424	$7,659	$7,859
Nonresident	$8,199	$8,946	$9,533	$10,431	$11,449	$12,224	$12,725	$13,802	$14,797	$16,078	$17,077	$17,888	$18,490	$19,133	$19,772	$20,727	$21,505	$22,197	$22,805
Weber State University																			
Resident	$2,427	$2,632	$2,876	$3,165	$3,432	$3,664	$3,854	$4,088	$4,311	$4,547	$4,761	$4,990	$5,183	$5,339	$5,523	$5,712	$5,859	$5,986	$6,106
Nonresident	$7,295	$7,958	$8,736	$9,599	$10,415	$11,135	$11,161	$11,555	$11,901	$12,258	$12,858	$13,311	$13,837	$14,252	$14,749	$15,260	$15,646	$15,969	$16,288
Southern Utah University																			
Resident	$2,350	$2,794	$3,054	$3,358	$3,565	$3,796	$4,028	$4,269	$4,736	$5,198	$5,576	$5,924	$6,138	$6,300	$6,530	$6,676	$6,770	$6,770	$6,770
Nonresident	$7,344	$8,158	$9,008	$9,877	$10,603	$11,327	$12,082	$12,847	$14,386	$15,910	$16,984	$17,902	$18,596	$19,132	$19,810	$20,288	$20,586	$20,586	$20,586
Snow College																			
Resident	$1,523	$1,670	$1,794	$1,996	$2,164	$2,262	$2,348	$2,542	$2,746	$2,910	$3,086	$3,220	$3,388	$3,484	$3,592	$3,692	$3,742	$3,836	$3,912
Nonresident	$5,742	$6,372	$6,556	$7,210	$7,498	$7,889	$8,228	$8,238	$8,984	$9,586	$10,230	$10,722	$11,342	$11,676	$12,070	$12,382	$12,562	$12,876	$12,876
Dixie State University																			
Resident	$1,612	$1,778	$1,886	$1,984	$2,492	$2,728	$2,893	$3,145	$3,489	$3,888	$4,089	$4,285	$4,456	$4,620	$4,840	$5,080	$5,253	$5,496	$5,662
Nonresident	$6,038	$6,554	$7,034	$7,390	$9,056	$9,447	$10,063	$10,897	$12,117	$13,536	$11,721	$12,307	$12,792	$13,206	$13,855	$14,548	$15,051	$15,792	$16,260
Utah Valley University																			
Resident	$2,196	$2,450	$2,788	$3,022	$3,308	$3,528	$3,752	$4,048	$4,288	$4,584	$4,786	$5,086	$5,270	$5,386	$5,530	$5,432	$5,726	$5,820	$5,906
Nonresident	$6,802	$7,630	$8,718	$9,472	$10,338	$11,029	$11,514	$11,888	$12,246	$12,940	$13,518	$14,256	$14,802	$15,202	$15,690	$16,066	$16,296	$16,570	$16,806
Salt Lake Community College																			
Resident	$1,890	$2,035	$2,174	$2,312	$2,404	$2,536	$2,660	$2,790	$2,932	$3,052	$3,170	$3,342	$3,468	$3,568	$3,689	$4,009	$3,843	$3,929	$3,989
Nonresident	$5,800	$6,277	$6,754	$7,232	$7,519	$7,958	$8,374	$8,730	$9,172	$9,604	$10,012	$10,594	$11,010	$11,020	$11,728	$12,020	$12,206	$12,460	$12,709

Note: Tuition is equal to two semesters at 15 credit hours each. Lower division (freshman & sophomore) rate only. Higher differential rate for upper division (junior and senior) for University of Utah. Higher differential rates may apply based on institution and program of study. Institutions are sorted by the type of institution and the year they were founded.
Source: Utah System of Higher Education

Table 13.6: History of Degrees by Public Degree-Granting Institutions in Utah

Degree	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	1-Year Change		5-Year Change	
									Absolute	Percent	Absolute	Percent
University Totals												
University of Utah	8,155	8,023	8,183	8,169	8,554	8,604	8,758	9,147	389	4.4%	964	11.8%
Utah State University[1]	5,483	5,795	6,082	6,231	6,446	6,642	6,978	7,128	150	2.1%	1,046	17.2%
Weber State University	4,736	4,690	5,086	5,105	5,191	5,380	5,615	5,782	167	3.0%	696	13.7%
Southern Utah University	1,743	1,565	1,545	1,736	2,177	2,357	2,763	3,027	264	9.6%	1,482	95.9%
Snow College	936	745	856	968	1,020	1,055	1,142	1,434	292	25.6%	578	67.5%
Dixie State University	2,028	2,003	1,941	1,919	1,935	2,034	2,309	2,538	229	9.9%	597	30.8%
Utah Valley University	4,611	5,242	5,082	5,107	5,024	6,084	6,304	9,917	3,613	57.3%	4,835	95.1%
Salt Lake Community College	4,049	4,428	4,022	4,587	6,354	5,600	4,753	5,058	305	6.4%	1,036	25.8%
Total Public	31,741	32,491	32,797	33,822	36,701	37,756	38,622	44,031	5,409	14.0%	11,234	34.3%
Certificates & Awards*												
University of Utah	369	397	222	386	410	430	488	674	186	38.1%	452	203.6%
Utah State University1	71	205	247	237	214	258	390	568	178	45.6%	321	130.0%
Weber State University	80	75	90	118	110	144	163	168	5	3.1%	78	86.7%
Southern Utah University	19	9	21	31	113	163	282	404	122	43.3%	383	1823.8%
Snow College	205	44	47	79	74	125	126	395	269	213.5%	348	740.4%
Dixie State University	384	344	316	299	288	390	594	709	115	19.4%	393	124.4%
Utah Valley University	35	85	113	178	204	331	352	3,567	3,215	913.4%	3,454	3056.6%
Salt Lake Community College	564	646	640	900	2,667	2,428	1,533	1,665	132	8.6%	1,025	160.2%
Total Certificates & Awards	1,727	1,805	1,696	2,228	4,080	4,269	3,928	8,150	4,222	107.5%	6,454	380.5%
Associate												
Utah State University1	851	1,000	1,272	1,252	1,451	1,346	1,100	1,209	109	9.9%	-63	-5.0%
Weber State University	1,995	1,994	2,216	2,245	2,361	2,473	2,670	2,678	8	0.3%	462	20.8%
Southern Utah University	421	337	294	532	641	821	906	963	57	6.3%	669	227.6%
Snow College	731	694	801	864	929	910	979	1,010	31	3.2%	209	26.1%
Dixie State University	1,132	1,150	1,013	974	923	894	901	863	-38	-4.2%	-150	-14.8%
Utah Valley University	1,768	2,280	1,996	1,929	1,784	2,336	2,231	2,352	121	5.4%	356	17.8%
Salt Lake Community College	3,485	3,782	3,382	3,687	3,687	3,172	3,220	3,393	173	5.4%	11	0.3%
Total Associate	10,383	11,237	10,974	11,483	11,776	11,952	12,007	12,468	461	3.8%	1,494	13.6%
Baccalaureate												
University of Utah	5,139	5,092	5,246	5,167	5,214	5,263	5,237	5,310	73	1.4%	64	1.2%
Utah State University	3,557	3,548	3,551	3,810	3,846	3,952	4,531	4,411	-120	-2.6%	860	24.2%
Weber State University	2,360	2,349	2,505	2,488	2,458	2,414	2,451	2,603	152	6.2%	98	3.9%
Southern Utah University	988	954	928	895	1,043	961	1,157	1,210	53	4.6%	282	30.4%
Snow College		7	8	25	17	20	37	29	-8	-21.6%	21	262.5%
Dixie State University	512	509	612	646	724	750	814	936	122	15.0%	324	52.9%
Utah Valley University	2,739	2,825	2,915	2,903	2,940	3,224	3,471	3,713	242	7.0%	798	27.4%
Total Baccalaureate	15,295	15,284	15,765	15,934	16,242	16,584	17,698	18,212	514	2.9%	2,447	15.5%
Masters												
University of Utah	1,921	1,823	1,948	1,901	2,140	2,155	2,198	2,296	98	4.5%	348	17.9%
Utah State University	895	927	904	830	838	979	839	837	-2	-0.2%	-67	-7.4%
Weber State University	301	272	275	254	262	349	331	333	2	0.6%	58	21.1%
Southern Utah University	315	265	302	278	380	412	418	450	32	7.7%	148	49.0%
Dixie State University	-	-	-	-	-	-	-	30	-	-	-	-
Utah Valley University	69	52	58	97	96	193	250	285	35	14.0%	227	391.4%
Total Masters	3,501	3,339	3,487	3,360	3,716	4,088	4,036	4,231	195	4.8%	744	21.3%
Doctorate												
University of Utah	324	330	384	331	339	346	376	371	-5	-1.3%	-13	-3.4%
Utah State University	105	109	102	94	95	99	113	96	-17	-15.0%	-6	-5.9%
Total Doctorate	429	439	486	425	434	445	489	467	-22	-4.5%	-19	-3.9%
First Professional												
University of Utah	402	381	383	384	451	410	459	496	37	8.1%	113	29.5%
Utah State University	4	6	6	8	2	8	5	7	2	40.0%	1	16.7%
Total First Professional	406	387	389	392	453	418	464	503	39	8.4%	114	29.3%

Note: Institutions are sorted by the type of institution and the year they were founded.

*Includes Post-Baccalaureate and Post-Master's Certificates for the University of Utah and Utah State University

1. Completions counts include Utah State Univeristy - Eastern

Source: IPEDS Completions Surveys

Table 13.7: Technical College Certificates Awarded

	2007-2008	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020
Bridgerland	367	484	695	537	806	912	829	862	918	847	797	906	925
Davis	604	1,142	1,561	1,356	1,310	1,371	1,419	1,468	1,769	1,403	1,299	1,468	1,455
Dixie	67	418	155	255	455	258	471	631	781	292	306	370	341
Mountainland	1,141	1,138	1,398	1,512	1,529	1,636	1,776	2,182	2,194	1,925	1,712	2,178	1,660
Ogden-Weber	687	722	1,015	1,018	1,022	1,029	1,129	1,240	1,348	891	854	952	882
Southwest	115	201	120	124	145	126	270	211	341	319	371	451	309
Tooele		93	199	171	132	99	200	206	228	221	196	222	193
Uintah Basin	226	278	287	413	447	487	877	782	571	522	542	574	568
Total	3,207	4,476	5,430	5,386	5,846	5,918	6,971	7,582	8,150	6,420	6,077	7,121	6,333

Source: Utah System of Higher Education

Table 13.8: Public Institutions in Utah Total Degrees and Awards by Instructional Program 2019-2020

Classification of Instructional Program (Cip)	U of U	USU	WSU	SUU	SNOW	DSU	UVU	SLCC	TOTAL
Agricultural/Animal/Plant/Veterinary Science and Related Fields	0	244	0	26	27	0	0	0	297
Architecture And Related Services	60	17	0	0	0	0	0	15	92
Area, Ethnic, Cultural, Gender, and Group Studies	72	61	0	0	0	0	0	0	133
Biological and Biomedical Sciences	271	178	98	88	9	65	152	18	879
Business, Management, Marketing, and Related Support Services	1539	733	654	291	88	231	1193	417	5,146
Communication, Journalism, and Related Programs	365	178	158	98	9	119	198	52	1,177
Communications Technologies/Technicians and Support Services	0	0	0	0	0	0	16	76	92
Computer and Information Sciences and Support Services	575	251	320	51	14	54	457	665	2,387
Construction Trades	0	2	0	0	7	0	61	43	113
Culinary, Entertainment, and Personal Services	0	7	0	0	10	0	36	24	77
Education	250	725	180	247	64	56	356	73	1,951
Engineering	806	412	61	15	51	8	125	56	1,534
Engineering/Engineering-Related Technologies/Technicians	3	446	148	44	2	0	145	65	853
English Language and Literature/Letters	136	121	66	39	14	33	97	27	533
Family And Consumer Sciences/Human Sciences	143	204	87	72	32	0	67	11	616
Foreign Languages, Literatures, and Linguistics	105	39	115	18	5	8	47	6	343
Health Professions and Related Programs	1111	715	1868	68	408	524	381	542	5,617
History	80	50	30	14	7	4	39	13	237
Homeland Security, Law Enforcement, Firefighting & Protective Svcs	1	26	130	53	13	54	463	113	853
Legal Professions and Studies	147	17	0	6	2	0	12	21	205
Liberal Arts and Sciences, General Studies And Humanities	279	1085	1348	1369	499	1140	4597	2165	12,482
Library Science	0	1	0	0	0	0	0	0	1
Mathematics and Statistics	149	57	44	6	3	5	34	3	301
Mechanic and Repair Technologies/Technicians	0	63	22	0	13	1	52	87	238
Military Technologies and Applied Sciences	0	0	0	0	0	0	10	0	10
Multi/Interdisciplinary Studies	220	206	0	47	0	59	47	2	581
Natural Resources and Conservation	102	113	0	0	9	0	9	0	233
Parks, Recreation, Leisure, Fitness, and Kinesiology	297	27	42	96	6	40	120	11	639
Philosophy and Religious Studies	30	17	5	5	1	0	26	0	84
Physical Sciences	287	60	44	23	5	2	34	24	479
Precision Production	0	21	0	0	7	0	4	55	87
Psychology	493	265	85	91	17	46	448	151	1,596
Public Administration and Social Service Professions	374	114	65	54	15	0	95	25	742
Science Technologies/Technicians	0	0	50	0	0	0	0	23	73
Social Sciences	848	528	82	64	8	7	69	106	1,712
Transportation and Materials Moving	0	34	0	39	0	0	216	73	362
Visual and Performing Arts	404	111	80	103	89	82	311	96	1,276
Total	9,147	7,128	5,782	3,027	1,434	2,538	9,917	5,058	44,031

Source: Utah System of Higher Education

Table 13.9: History of Fall Enrollment at Public Degree-Granting Institutions in Utah

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020 (est.)
Student Headcount										
University of Utah	32,722	33,291	36,226	32,003	32,155	32,451	33,153	33,369	33,152	33,080
Utah State University1	29,908	29,694	28,698	28,707	29,319	28,986	29,026	29,367	29,093	27,691
Weber State University	26,256	27,381	25,886	26,913	26,252	27,236	28,379	28,700	29,969	29,596
Southern Utah University	8,264	8,706	8,227	8,200	9,145	9,598	10,245	10,772	12,210	12,582
Snow College	4,459	4,598	4,581	4,805	5,107	5,414	5,589	5,574	5,450	5,800
Dixie State University	8,840	8,587	8,147	8,342	8,464	8,991	9,707	9,986	11,177	12,043
Utah Valley University	32,734	31,810	30,880	31,589	33,565	35,126	37,785	40,471	42,030	40,936
Salt Lake Community College	36,782	35,804	35,043	33,451	31,131	32,133	32,277	30,940	30,782	27,293
Total	179,965	179,871	177,688	174,010	175,138	179,935	186,161	189,179	193,863	189,021
Full-Time Equivalent										
University of Utah	26,962	27,576	27,588	27,015	27,187	27,683	28,188	28,594	28,629	28,736
Utah State University1	21,323	21,136	20,674	21,286	22,415	22,390	22,813	23,153	22,899	22,072
Weber State University	16,166	16,781	15,742	16,133	16,108	16,557	17,221	17,465	18,022	18,260
Southern Utah University	6,361	6,653	6,331	6,277	7,025	7,396	7,761	8,268	8,758	9,360
Snow College	3,488	3,556	3,530	3,777	3,982	4,041	4,097	4,022	3,931	4,074
Dixie State University	6,506	6,443	6,176	6,318	6,377	6,851	7,398	7,539	8,146	8,887
Utah Valley University	22,078	21,692	20,780	21,402	22,693	23,761	25,198	26,770	27,636	27,202
Salt Lake Community College	18,727	18,347	17,676	16,897	16,045	15,904	16,297	15,621	15,544	14,359
Total	121,611	122,184	118,497	119,105	121,832	124,583	128,973	131,432	133,565	132,950

Source: Utah System of Higher Education

Table 13.10 History of Enrollment at Technical Colleges in Utah by Student Headcount

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Bridgerland	5,151	4,891	4,253	3,860	3,527	3,741	3,815	3,940	3,793	3,526
Davis	6,661	6,204	5,197	4,923	5,160	4,743	4,604	4,528	4,547	4,723
Dixie	6,017	5,836	6,108	5,693	6,693	7,569	4,333	4,920	6,146	2,001
Mountainland	3,449	2,702	2,375	2,456	2,925	2,868	2,840	2,919	3,442	3,664
Ogden-Weber	4,232	4,066	4,008	3,924	4,221	4,392	4,173	4,257	4,187	4,015
Southwest	945	1,035	789	743	669	990	1,452	1,351	1,515	1,196
Tooele	424	413	401	563	555	617	661	721	840	763
Uintah Basin	5,202	5,374	4,440	4,542	3,791	2,870	2,324	2,450	2,356	2,271
UTech Totals	32,081	30,521	27,571	26,704	27,541	27,790	24,202	25,086	26,826	22,159

Source: Utah System of Higher Education
Note: Enrollments include certificates and all other occupational training

Table 13.11: Summary of Tuition and Fees for Major Private Institutions

Institution	2013–14	2014–15	2015–16	2016–17	2017–18	2018–19	2019-20
Brigham Young University							
LDS Student	$4,850	$5,000	$5,150	$5,300	$5,460	$5,620	$5,790
Non-LDS Student	$9,700	$10,000	$10,300	$10,600	$10,920	$11,240	$11,580
LDS Business College							
LDS Student	$3,060	$3,060	$3,160	$3,240	$3,340	$3,440	$3,440
Non-LDS Student	$6,120	$6,120	$6,320	$6,480	$6,680	$6,880	$6,880
Westminster College							
Full-time Rate	$28,992	$29,856	$30,720	$32,104	$32,520	$33,480	$34,984
Western Governor's University							
Rate per calendar year*					$6,958	$7,573	$7,657

*Average tuition across colleges
Note: Tuition is equal to two semesters at 15 credit hours each. Lower division (freshman & sophomore) rate only. Higher differential rate for upper division (junior and senior) for University of Utah. Higher differential rates may apply based on institution and program of study. Institutions are sorted by the type of institution and the year they were founded.
Source: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS)

Agriculture

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Caroline Hargraves, Utah Department of Agriculture and Food

2020 OVERVIEW

General

Total agriculture receipts, or the market value of agricultural commodities, totaled $1.82 billion in 2019, up 7.7% from 2018's $1.69 billion. The farm, forestry, fishing, and related activities sectors provided 25,148 jobs earning a total of $320.3 million.[1]

In 2019, Utah had an estimated 11 million acres in farmland, including 8.6 million acres of pastureland, 20.9% of Utah's total 52.6 million acres of land. This ranks Utah as 26th in the country in total land in farms. Utah is home to 17,800 agriculture operations (ranked 37th nationally), down 300 operations from 2018. Utah's average farm size is 601 acres (ranked 12th nationally), up slightly (1.7%) compared with 591 acres in 2018.

Top Counties

Utah's top five counties for 2019 agricultural sales were Utah ($205 million), Beaver ($173 million), Millard ($172 million), Sanpete ($165 million), and Box Elder ($150 million).[2]

Utah's top five counties in total number of farms are Utah (2,589), Cache (1,397), Weber (1,260), Box Elder (1,187), and Uintah (1,114). Daggett County had the fewest at 52.[3]

Production

In terms of revenue generated, Utah's top five agricultural products are beef cattle and calves, dairy products, hogs, hay, and greenhouse and nursery. Over three-quarters of Utah's agricultural income is generated by livestock and livestock products, with beef cattle and milk leading this sector. Livestock is the foundation of Utah agriculture. Abundant rangelands support livestock production and more than 6,000 cattle-ranching families.

Hay is Utah's largest crop, grown to feed beef and dairy cattle. Leading fruits are apples, cherries, peaches, apricots, and pears. Leading vegetables are onions, potatoes, and dry beans. Mushrooms and safflower are also grown in Utah.

Nationally, Utah ranks second in mink pelt production, second in tart cherry production, fourth in wool production, fourth in safflower production, 15th in hog and pig production, 21st in dairy cow production, and 27th in beef cows.

Sales and Prices

In 2019, there were 810,000 beef cattle and calves, up from 790,000 in 2018, a 2.5% increase. Cattle and calf sales also increased over the same period from $450 million to $493 million, a 9.4% increase. There were also 960,000 hogs on Utah farms in 2019, a 35.2% year-over increase. Pork sales increased 34.2% from $124 million in 2018 to $166 million in 2019. Sheep and lambs totaled 290,000 in 2019, a year-over increase of 5.5%. There were 98,000 milk cows in 2019, compared with 100,000 milk cows in 2018, a 2.0% decrease. The compensation price for milk increased over the same period from $16.10/cwt to $18.50/cwt, a 14.9% increase.

Livestock, livestock products, and poultry sales increased 6.4% from $1.2 billion in 2018 to $1.3 billion in 2019. Total crop sales grew from $486 million in 2018 to $541 million in 2019, an 11.4% increase.

Total agriculture sales figures do not reflect the value of commodities produced and used on Utah farms and ranches, such as hay, grain, and corn fed to livestock. By incorporating this value, the overall contribution of agriculture production would increase by approximately 40%.

1. U.S. Bureau of Economic Analysis
2. *2020 Utah Agriculture Statistics* and *Utah Department of Agriculture and Food Annual Report*
3. Ibid.

Significant Issues

Animal agriculture is the foundation of Utah agriculture. Ranching operations require a combination of private and public lands to be sustainable and economically viable. Ranchers face tremendous uncertainty with 63% of Utah lands under federal control.

Predation, led by coyotes, continues to be a problem for sheep, cattle, and poultry producers, especially on or near public lands. Predator control funding comes from state and federal sources, as well as from ranchers who pay a per-head assessment. The focus of the program is to protect livestock, primarily adult sheep, lambs, and calves, from predators, including coyotes, cougars, bears, and ravens. In 2019, 14,200 sheep were lost solely to coyotes, down 30.0% from 2018. In addition, during that same year, 7,700 sheep were lost to cougars and bears, down 3.8% from 2018.

Agriculture Sustainability

Each Utah farm or ranch is unique. Often, we think of ranchers on horseback surrounded by their animals or a farmer in a large field with a tractor; these types of farms still account for the majority of agricultural products in Utah. However, urban farms are also adding to our local food supply.

Utah's population growth, land prices, and fluctuating operating costs and market prices for agricultural products continue to pressure conversion of fruit, vegetable, and other farmland for residential and commercial development. Agriculture diverts approximately 82% of developed water, but returns more than half back into the ecosystem. In the nation's second most arid state, growth continues to pressure conversion of agricultural water to municipal and industrial uses.

Farmers continue to face economic uncertainty. In 2018, the farmer share of food spending rose slightly to 14.6 cents per dollar, up from 14.4 in 2017. In the same period, farm production costs per food dollar rose to 8 cents in 2018, up from 7.7 cents in 2017 and the first year-to-year increase since 2013.[4]

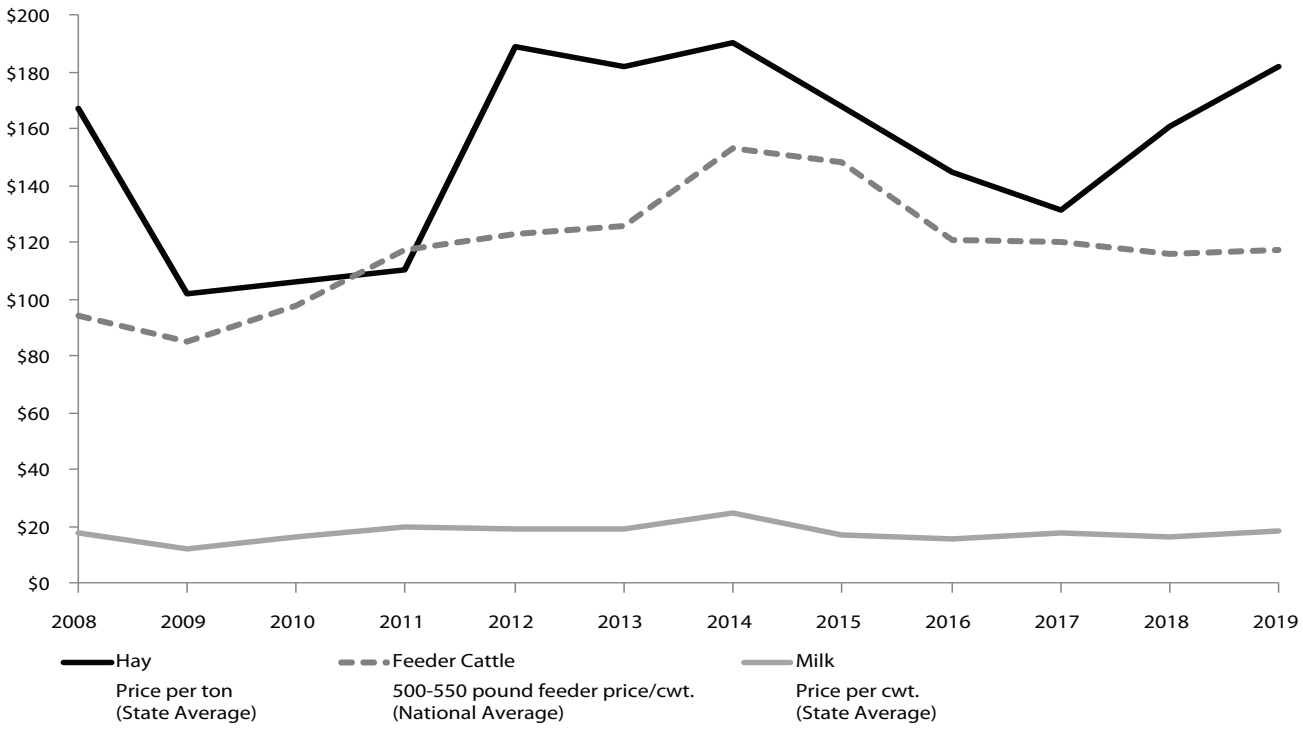
2021 OUTLOOK

Agriculture production and processing play a significant role in Utah's diverse economy. The impacts of COVID-19 have exposed new vulnerabilities, brought past vulnerabilities to the surface, and promoted discussion concerning the costs and benefits of a locally controlled food supply chain. The meat supply chain in particular is at risk from market disruptions. Expanding infrastructure for meat processing, fruit processing and packaging, and co-packing and bottling presents unique opportunities to capture manufacturing dollars for agricultural products in Utah.

Developing countries, expanding global markets, and changing consumer food purchasing behaviors keep Utah's production agriculture industry evolving and in demand. Additionally, farms and ranches provide open space and are highly valued contributors to Utahns' quality of life. Population growth in a state with limited water and private land continues to put pressure on these natural resources to transition from food production to urban development.

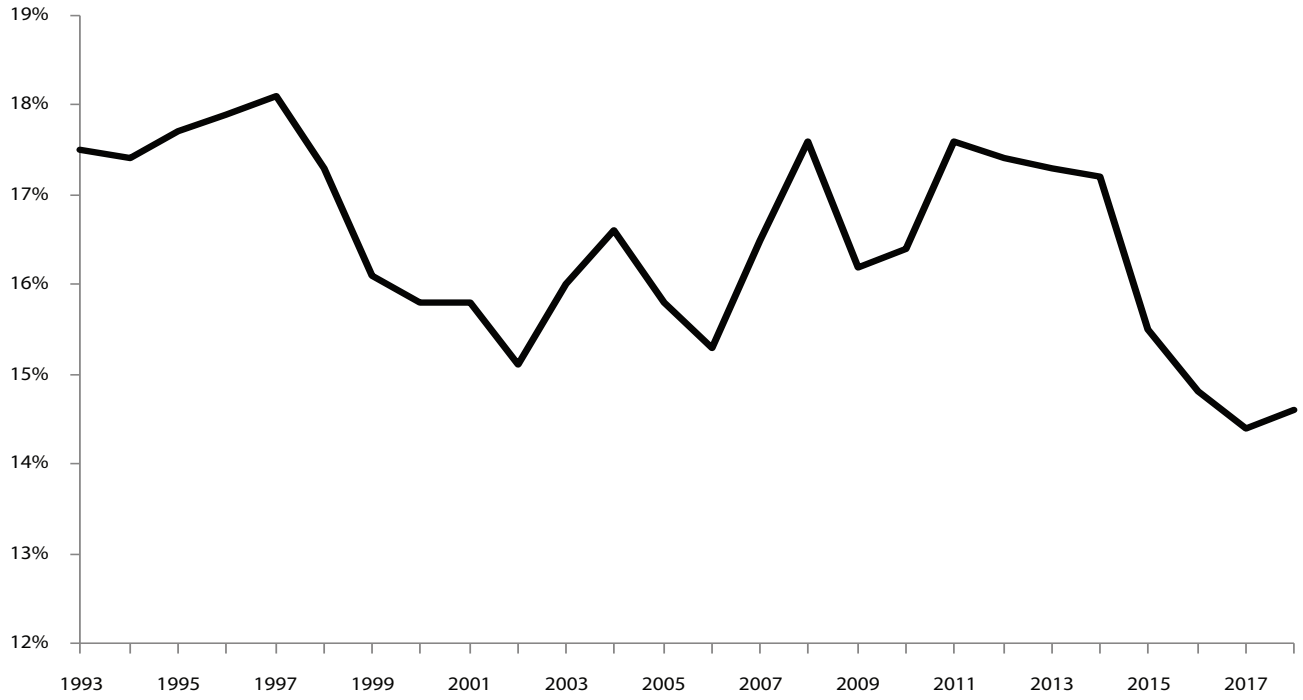
4. United States Department of Agriculture, Economic Research Service

Figure 14.1: Average Annual Price Received in Major Utah Agricultural Sectors



Source: U.S. Department of Agriculture & Utah Department of Agriculture and Food

Figure 14.2: Farmers' Share of Food Spending



Source: U.S. Department of Agriculture , Economic Research Service

Real Estate and Residential Construction 15

James A. Wood, Kem C. Gardner Policy Institute

2020 OVERVIEW

In 2020, the value of permit-authorized construction in Utah was $10.3 billion, the highest year ever, in both current and inflation-adjusted dollars. The previous peak was in 2019, with a total value of $9.8 billion. Construction value includes the value of permit-authorized residential and nonresidential construction and the construction value of additions, alterations, and repairs to existing structures. Permit-authorized construction does not include most public construction, such as roads, highways, prisons, and schools.

Residential Construction

Sixty-one percent of the $10.3 billion in total construction value in 2020 was for residential construction activity. The value of residential construction in 2020 was $6.3 billion, 9.1% higher than the previous year. The strong growth in value reflects the 11.0% increase in residential permits issued for new units. The number of residential permits issued in 2020 was 30,745 compared with 27,610 in 2019. In March, with the emergence of COVID-19, the outlook for the housing market appeared bleak. But by May, the Federal Reserve dropped interest rates to prevent a pandemic-induced recession. Historically low interest rates have brought buyers into the market and led to the hottest housing market in at least 15 years; since August, mortgage rates have been below 3.0%, dipping to as low as 2.77% in November.

The boom in multifamily (apartments, condominiums, and townhomes) construction continued in 2020, but there was a shift in type of multifamily permits. Apartment permits dropped by 10.0%, while condominium and townhome permits increased by 27.0%. For only the fourth time in Utah's housing history, multifamily permits exceeded single-family permits. Three of those occurrences have been in the past six years. Multifamily permits totaled 15,850, accounting for 51.0% of all residential permits in 2020. The number of multifamily units increased from 15,365 in 2019 to 15,850 in 2020, a gain of 3.2%.

Both condominium and apartment construction drove the strong performance of the multifamily sector in 2020. Since the beginning of the residential boom in 2014, 45,300 permits have been issued for apartment units statewide and 32,360 for condominiums. Apartments and condominiums combined account for 48.0% of all residential building permits issued since 2014.

Single-family permits increased by 21.4% in 2020, the largest increase in seven years. The number of single-family permits was 14,550 in 2020 compared with 11,985 in 2019, the highest level since the run-up to the Great Recession in 2006. The strong demand for housing has led to an increase in the price of a new single-family home. According to Metrostudy, the median sales price of a new, detached, single-family home in the Wasatch Front counties was $430,000 in 2020, an increase of 74.0% since 2012.

2021 OUTLOOK

The value of permit-authorized construction in Utah in 2021 is forecast at $9.65 billion, a decline of 6.4% from 2020. The number of residential units is forecast at 30,000 units, down slightly from the 30,745 in 2020. The small decline is due to an expected lower level of apartment permit activity. The value of residential construction will hold steady at around $6.1 billion, while the value of nonresidential construction and additions, alterations, and repairs will likely see modest declines. Nonresidential construction value is forecast at $2.0 billion, a drop of over $300 million from 2020. Additions, alterations, and repairs value is forecast at $1.5 billion, a decline of $150 million.

Table 15.1: Residential and Nonresidential Construction Activity

Year	Single-Family Units	Multi-Family Units	Mobile Homes/ Cabins	Total Units	Value (nominal millions)			
					Residential	Nonresidential	Add., Alt., and Repairs	Total
1970	5,962	3,108	na	9,070	$117.0	$87.3	$18.0	$222.3
1971	6,768	6,009	na	12,777	176.8	121.6	23.9	322.3
1972	8,807	8,513	na	17,320	256.5	99.0	31.8	387.3
1973	7,546	5,904	na	13,450	240.9	150.3	36.3	427.5
1974	8,284	3,217	na	11,501	237.9	174.2	52.3	464.4
1975	10,912	2,800	na	13,712	330.6	196.5	50.0	577.1
1976	13,546	5,075	na	18,621	507.0	216.8	49.4	773.2
1977	17,424	5,856	na	23,280	728.0	327.1	61.7	1,116.8
1978	15,618	5,646	na	21,264	734.0	338.6	70.8	1,143.4
1979	12,570	4,179	na	16,749	645.8	490.3	96.0	1,232.1
1980	7,760	3,141	na	10,901	408.3	430.0	83.7	922.0
1981	5,413	3,840	na	9,253	451.5	378.2	101.6	931.3
1982	4,767	2,904	na	7,671	347.6	440.1	175.7	963.4
1983	8,806	5,858	na	14,664	657.8	321.0	136.3	1,115.1
1984	7,496	11,327	na	18,823	786.7	535.2	172.9	1,494.8
1985	7,403	7,844	na	15,247	706.2	567.7	167.6	1,441.5
1986	8,512	4,932	na	13,444	715.5	439.9	164.1	1,319.5
1987	6,530	755	na	7,285	495.2	413.4	166.4	1,075.0
1988	5,297	418	na	5,715	413.0	272.1	161.5	846.6
1989	5,197	453	na	5,650	447.8	389.6	171.1	1,008.5
1990	6,099	910	na	7,009	579.4	422.9	243.4	1,245.7
1991	7,911	958	572	9,441	791.0	342.6	186.9	1,320.5
1992	10,375	1,722	904	13,001	1,113.6	396.9	234.8	1,745.3
1993	12,929	3,865	1,010	17,804	1,504.4	463.7	337.3	2,305.4
1994	13,947	4,646	1,154	19,747	1,730.1	772.2	341.9	2,844.2
1995	13,904	6,425	1,229	21,558	1,854.6	832.7	409.0	3,096.3
1996	15,139	7,190	1,408	23,737	2,104.5	951.8	386.3	3,442.6
1997	14,079	5,265	1,343	20,687	1,943.5	1,370.9	407.1	3,721.5
1998	14,476	5,762	1,505	21,743	2,188.7	1,148.4	461.3	3,798.4
1999	14,561	4,443	1,346	20,350	2,238.0	1,195.0	537.0	3,970.0
2000	13,463	3,629	1,062	18,154	2,140.1	1,213.0	583.3	3,936.4
2001	13,851	5,089	735	19,675	2,352.7	969.8	562.8	3,885.3
2002	14,466	4,149	926	19,541	2,491.0	897.2	393.0	3,781.2
2003	16,515	5,555	766	22,836	3,046.4	1,017.5	497.0	4,560.9
2004	17,724	5,853	716	24,293	3,552.6	1,089.9	476.0	5,118.5
2005	20,912	6,562	811	28,285	4,662.6	1,217.8	707.6	6,588.0
2006	19,888	5,658	776	26,322	4,955.5	1,588.4	865.3	7,409.2
2007	13,510	6,290	739	20,539	3,963.2	2,051.4	979.7	6,994.3
2008	5,513	4,544	546	10,603	1,877.0	1,919.1	781.2	4,577.3
2009	5,217	4,951	320	10,488	1,674.0	1,056.1	660.1	3,390.2
2010	5,936	2,890	240	9,066	1,667.0	925.1	672.0	3,264.1
2011	5,391	3,518	176	9,085	1,769.7	1,456.5	846.4	4,072.5
2012	7,655	4,108	156	11,919	2,205.0	1,020.2	728.9	3,954.0
2013	9,858	5,008	143	15,009	3,087.1	1,106.0	785.1	4,978.2
2014	8,715	9,864	231	18,810	3,390.4	1,475.9	1,034.5	5,900.8
2015	9,940	7,143	211	17,294	3,819.2	2,076.5	1,006.4	6,902.1
2016	10,692	9,170	202	20,064	4,082.0	2,680.1	1,624.2	8,386.2
2017	12,146	10,530	326	23,002	4,696.1	2,280.6	1,214.6	8,191.3
2018	12,947	11,059	239	24,245	5,153.0	2,166.5	1,136.0	8,455.5
2019	11,985	15,365	260	27,610	5,800.2	2,595.9	1,413.7	9,809.8
2020e	14,550	15,850	345	30,745	6,330.0	2,334.0	1,649.0	10,313.0
2021f	14,500	15,200	300	30,000	6,150.0	2,000.0	1,500.0	9,650.0

Notes: e = estimate, f = forecast. Beginning in 2011, single-family counts include other residential units; beginning in 2016, multi-family counts include group quarters units.
Source: Ivory-Boyer Construction Database, Kem C. Gardner Policy Institute, University of Utah

Table 15.2: Average Rates for 30-Year Mortgages

Year	Mortgage Rate
1968	7.03%
1969	7.82%
1970	8.35%
1971	7.55%
1972	7.38%
1973	8.04%
1974	9.19%
1975	9.04%
1976	8.86%
1977	8.84%
1978	9.63%
1979	11.19%
1980	13.77%
1981	16.63%
1982	16.09%
1983	13.23%
1984	13.87%
1985	12.42%

Year	Mortgage Rate
1986	10.18%
1987	10.19%
1988	10.33%
1989	10.32%
1990	10.13%
1991	9.25%
1992	8.40%
1993	7.33%
1994	8.36%
1995	7.95%
1996	7.81%
1997	7.60%
1998	6.95%
1999	7.43%
2000	8.06%
2001	6.97%
2002	6.54%
2003	5.80%

Year	Mortgage Rate
2004	5.84%
2005	5.87%
2006	6.40%
2007	6.38%
2008	6.10%
2009	5.04%
2010	4.69%
2011	4.45%
2012	3.66%
2013	3.98%
2014	4.17%
2015	3.85%
2016	3.65%
2017	3.99%
2018	4.54%
2019	3.94%
2020*	3.16%

Note: *through November
Source: Freddie Mac

Table 15.3: Housing Price Index for Utah

Year	Index	Year-Over Change
1992	110.2	8.1%
1993	125.8	14.1%
1994	146.4	16.3%
1995	159.9	9.3%
1996	172.8	7.9%
1997	179.1	3.6%
1998	185.4	3.5%
1999	190.1	2.6%
2000	194.2	2.2%
2001	197.9	1.9%
2002	201.2	1.7%
2003	206.4	2.6%
2004	218.3	5.8%
2005	242.9	11.3%
2006	283.8	16.8%

Year	Index	Year-Over Change
2007	318.1	12.1%
2008	303.0	-4.7%
2009	270.9	-10.6%
2010	255.1	-5.9%
2011	239.6	-6.1%
2012	256.3	7.0%
2013	282.9	10.4%
2014	296.6	4.8%
2015	315.8	6.5%
2016	343.0	8.6%
2017	370.1	8.0%
2018	408.3	10.2%
2019	437.8	7.2%
2020	475.9	8.7%

Note: Four-quarter average; 2020 is three-quarter average. Not seasonally adjusted; purchase only.
Source: Federal Housing Finance Agency

Nonresidential Construction

16

Dejan Eskic, Kem C. Gardner Policy Institute

2020 OVERVIEW

A year that began with optimism quickly changed as the global health pandemic ended a decade of economic growth. Job loss acceleration in the second quarter brought uncertainty to the nonresidential, commercial real estate market. With the implementation of business and commerce restrictions, office-using employment shifted to working from home, retailers closed with many shifting to online commerce, and hotel rooms sat empty. However, demand for industrial and warehouse space grew, driven by an increased demand for online, retail distribution space. The loss of nearly 22,000 jobs led to a 10.1% decrease in permitted construction value in 2020. The value of Utah's 2020 permit-authorized nonresidential construction is estimated at $2.3 billion. Approximately 83.0% of total nonresidential construction activity occurred in Salt Lake, Utah, and Davies counties, respectively.

Office, Bank, Professional Construction

After a record-setting 2019, with over $693.2 million in permitted construction value, the office sector suffered a 43.6% drop over last year. The total permitted construction value for office, bank, and professional buildings in 2020 is estimated at $391.0 million, a record decline in absolute change when compared to a previous year. While office-using employment did not suffer major job loss, the shift to working from home has put this real estate sector at a crossroads as occupiers are still deciding how to approach future space needs.

Retail, Mercantile, Restaurant Construction

The retail sector has experienced a mixed recovery since the last recession and the events of 2020 have added new challenges to its recovery. While retail stores regained jobs later in the year, the restaurant sector continues to struggle, likely leading to an increase in empty space. The sector is estimated to permit $146.5 million in construction value in 2020, a 5.0% decrease compared with last year.

Industrial, Warehouse, Manufacturing Construction

The industrial, warehouse, and manufacturing sector is a bright spot in the 2020 commercial real estate market. The sector surpassed its record-setting 2019 with a 1.7% increase in permitted construction value in 2020, totaling $683.7 million. The increase in logistics warehousing and retail distribution and storage space pushed demand to a new record.

Structures Other Than Buildings

Coming off a record 2019, structures other than buildings experienced a 37.3% decrease in 2020. Permitted construction value in 2020 is estimated at $222.0 million—a figure that is still 17.6% higher than the 10-year annual average of 188.7million.

Remaining Nonresidential Buildings

Twelve individual building types constitute this sector; together, they accounted for $891.1 million in 2020 permitted construction, a 23.3% increase over 2019. Several projects led to a near-record year. Construction began on a new convention hotel in Salt Lake City this year, setting a record for hotel permitted construction value and masking the struggles experienced due to COVID-19 impacts. Additional public building projects set a near-record this year as well.

2021 OUTLOOK

The 2021 forecast for the value of permit-authorized nonresidential construction in Utah is $2.0 billion, a 14.3% decrease from 2020. While the labor market will continue to recover next year, it will not be a full recovery. The job losses of 2020 will likely lead to an increase in vacant space. As the job market recovers in 2021, this empty space will need to be reabsorbed before new space is built.

The 2021 value of permit-authorized nonresidential construction is forecasted to decline by 13.1% in the office-bank-professional sector; decline by 18.1% in the retail-mercantile-restaurant sector; and decline by 7.1% in the industrial-warehouse-manufacturing sector.

Table 16.1: Nonresidential Construction Activity

Year	Value of Office/Bank/ Professional Construction (millions)	Value of Retail/ Mercantile/ Restaurant Construction (millions)	Value of Industrial/ Warehouse/ Manufacturing Construction (millions)	Value of Structures Other Than Buildings Construction* (millions)	Value of Remaining Nonres. Buildings Construction** (millions)	Total Value of Nonresidential Construction (millions)	Year-Over % Change
2000	$212.5	$192.2	$191.0	$44.4	$572.8	$1,213.0	
2001	$166.7	$182.2	$133.1	$39.2	$448.7	$969.8	-20.0%
2002	$184.2	$144.2	$85.0	$47.4	$436.3	$897.2	-7.5%
2003	$110.9	$205.6	$165.3	$32.8	$503.0	$1,017.5	13.4%
2004	$145.7	$212.7	$133.6	$62.8	$535.2	$1,089.9	7.1%
2005	$218.9	$164.6	$228.9	$58.7	$546.7	$1,217.8	11.7%
2006	$299.5	$284.2	$295.2	$75.4	$634.2	$1,588.4	30.4%
2007	$399.8	$267.9	$434.8	$164.2	$784.8	$2,051.4	29.1%
2008	$249.8	$358.1	$449.0	$102.4	$759.8	$1,919.1	-6.5%
2009	$104.6	$123.6	$356.0	$43.5	$428.4	$1,056.1	-45.0%
2010	$127.1	$94.2	$127.4	$67.7	$508.8	$925.1	-12.4%
2011	$414.2	$104.6	$324.8	$63.6	$549.3	$1,456.5	57.4%
2012	$114.0	$133.7	$235.3	$54.1	$483.2	$1,020.2	-30.0%
2013	$214.9	$145.3	$176.8	$46.3	$522.6	$1,106.0	8.4%
2014	$354.5	$194.5	$270.3	$71.7	$584.9	$1,475.9	33.4%
2015	$442.0	$155.7	$502.4	$330.6	$645.9	$2,076.5	40.7%
2016	$380.7	$279.1	$289.1	$413.4	$1,317.8	$2,680.1	29.1%
2017	$489.1	$224.8	$405.9	$264.5	$896.3	$2,280.6	-14.9%
2018	$629.1	$152.5	$454.2	$188.0	$742.7	$2,166.5	-5.0%
2019	$693.2	$154.3	$672.2	$353.7	$722.5	$2,595.9	19.8%
2020e	$391.0	$146.5	$683.7	$222.0	$891.1	$2,334.3	-10.1%
2021f	$340.0	$120.0	$635.0	$180.0	$725.0	$2,000.0	-14.3%

Note: Nonresidential Construction Activity.
e = estimate, f = forecast
* Includes any new structure that requires a permit that is not a building and otherwise does not fit into another building or permit category, such as solar & alt. energy, retaining walls, signs, fences, etc.
** Includes: Agricultural Bldg. & Sheds, Amusement & Recreation, Churches & Other Religious, Hospital & Institutional, Hotels & Motels, Other Nonresidential Buildings, Parking Structures, Public Buildings & Projects, Public Utility (Private), Residential Garages/Carports, School & Educational (Private), Service Station/Repair Garages
Source: Ivory-Boyer Construction Database, Kem C. Gardner Policy Institute, University of Utah.

Energy

17

Michael Vanden Burg, Utah Geological Survey

2020 OVERVIEW

The story of Utah's energy economy in 2020 is linked to the worldwide response to the COVID-19 pandemic. Energy metrics across the board were impacted as stay-at-home directives were implemented starting in March 2020, with restrictions continuing well into the fall. Energy demand in nearly all downstream areas declined in 2020, which rippled through upstream sectors affecting both prices and production. The petroleum sector was hardest hit as plunging prices coupled with plummeting demand resulted in laid down drill rigs, shut-in wells, and layoffs in Utah's energy communities.

Utah crude oil prices averaged $34 per barrel in 2020, but experienced significant swings; starting the year near $50, then dropped briefly below $10 after the initial onset of the pandemic, before rebounding to the low $30 range later in the year. The volatility in oil prices coupled with decreased demand for petroleum products related to travel restrictions resulted in decreased Utah oil production, down 14% to 31.6 million barrels in 2020. COVID-19 restrictions did not influence natural gas markets as severely as the oil sector. Natural gas prices decreased in 2020, but this was mostly the result of continued oversupply from prolific U.S. shale reservoirs. As a result, drilling for natural gas in Utah virtually stopped years ago and production has declined by 50% since the 2012 peak.

Construction of new utility-scale solar facilities continued in 2019 and 2020 with the addition of over 400 megawatts (MW) of capacity, with nearly 1000 MW additional capacity slated for development in the next few years. Solar now dominates Utah's renewable energy portfolio providing 63% of total renewable capacity. This surge in solar has also occurred in the residential sector; the total installed residential PV capacity in Utah has increased from just 6 MW in 2013 to more than 315 MW in 2019.

Decreases in the demand for electricity in 2020 were disproportionately felt by coal-fired power plants, resulting in a decrease in coal demand which translated into a decrease in Utah coal production, down to 13.2 million tons, the lowest level since 1985. The establishment of a foreign export coal market continues to be a challenge as access to West Coast ports remain in question. Overall, generation of electricity in Utah has decreased 20% in the past 12 years, mostly from coal-fired power plants, whereas natural gas-fired power plants and renewable resources have greatly increased their share of total generation.

Numerous uncertainties still linger as to how Utah's energy industry, in particular the oil and gas sector, will recover from the dramatic disruptions in 2020. However, several signs indicate a reason for optimism. Oil prices rebounded much faster than most expected in early summer, and though not yet back to pre-COVID levels, the higher prices resulted in operators turning their oil wells back to full production and the completing of several wells that were drilled pre-COVID-19. In addition, drill rigs returned to the Uinta Basin starting in August and three to four rigs have continued drilling through the fall. Demand for petroleum products in Utah has mostly rebounded and impacts to electricity demand have been minimal and short lived.

Petroleum

Production Crude oil production dropped in 2016 to 30.5 million barrels following a significant drop in oil prices but rebounded back to about 37 million barrels in 2018 and 2019. In early 2020, the petroleum industry in Utah was poised to have another high production year, but in March, the COVID-19 pandemic caused major global disruptions to petroleum prices and demand, which rippled through Utah. By May 2020, all drill rigs ceased operations in Utah (eight rigs were drilling in early March) and companies shut-in or reduced flow from hundreds of wells. This restriction in activities resulted in production

dropping from 95,000 barrels per day in early 2020 down to 69,000 barrels per day in May. Production in Utah rebounded rather quickly, following strengthening crude oil prices in the early summer. By August 2020, production had returned to over 84,000 barrels per day and is expected to continue to climb through the remainder of the year. Crude oil production for 2020 is expected to reach 31.6 million barrels, a 14% decrease from 2019.

Total crude oil pipeline imports from Colorado, Wyoming, and Canada decreased 15% to 34 million barrels in 2020, as refineries adjusted to COVID-19-related decreases in petroleum product demand. Similarly, refinery receipts—the amount of crude oil delivered to Utah's five refineries—decreased 14% to 60 million barrels. Estimated exports of Utah crude oil peaked in 2014 at 15 million barrels coinciding with a peak in production. With the drop in production in 2020, exports of Utah crude oil dropped to an estimated 5.8 million barrels.

Prices and Value The COVID-19 pandemic, coupled with price wars between Russia and Saudi Arabia, created turmoil in the international oil markets. Oil prices dropped significantly in early spring 2020, with futures prices briefly plunging below $0 per barrel on April 20. These conditions rippled through Utah, where oil prices started the year just under $50 per barrel, dropped to $18 per barrel in May 2020, before rebounding to $35–$40 per barrel. Overall, Utah oil prices are estimated to average $34 per barrel in 2020, down 30% from the 2019 price. The overall decrease in price, coupled with a resultant slowing of production, pushed the value of Utah's produced crude oil down to $1.1 billion in 2020, down 40% from 2019. Following suit, Utah's average price for regular unleaded motor gasoline and diesel also decreased in 2020 to $2.32 and $2.50 per gallon, respectively.

Consumption Petroleum product demand plummeted in the spring of 2020 as travel restrictions and stay-at-home directives went into effect due to the COVID-19 pandemic. Utah's refined petroleum product production reached record highs in 2019 at 80 million barrels but decreased 13% to 70 million barrels in 2020. Refined petroleum product imports from Wyoming via the Pioneer pipeline decreased 6% from 16 million barrels to 15 million barrels in 2020, and Utah refineries exported an estimated 28 million barrels of petroleum products via pipeline to other states. Utah's total petroleum product consumption also reached record highs in 2019 at 61 million barrels but retreated in 2020 to 54 million barrels, 50% of which was motor gasoline and 30% diesel fuel.

Natural Gas

Production Utah's natural gas production peaked in 2012 at 491 billion cubic feet (Bcf) but has since retreated to 245 Bcf in 2020, the lowest in the past 34 years. The 10% decrease in production between 2019 and 2020 is the result of continued low prices, lack of drilling, and a decrease in associated gas (natural gas produced from crude oil wells) as crude oil production dropped due to pandemic-related disruptions. Dry production and actual natural gas sales also decreased to 236 and 200 Bcf, respectively. Similarly, natural gas liquids production decreased to about 3.3 million barrels. Nearly all of Utah's natural gas production comes from conventional reservoirs; only a few unconventional shale gas exploratory wells have been drilled, all before natural gas prices declined in 2015. With the sustained low natural gas prices, drill rigs in Utah are focused on liquid-rich plays with no significant drilling targeting natural gas since 2015.

Prices and Value The average wellhead price for natural gas in Utah decreased 24% in 2020 to about $1.90 per thousand cubic feet (Mcf), the first-time prices have been below $2 since 2002. Natural gas prices near $2 per Mcf provide no economic justification for natural gas exploration or development. In contrast, the residential natural gas price increased over 8% in 2020 to $8.45 per Mcf. Lower production of natural gas and natural gas liquids, coupled with the low prices, resulted in a 2020 natural gas production value of $514 million, the lowest since 1999.

Consumption Natural gas consumption in Utah has been volatile over the past few years mostly due to large swings in the electric utility market. After reaching a record high of 264 Bcf in 2019, consumption decreased 5% in 2020 to 251 Bcf, including 9% decreases in the residential sector and

13% decreases in the commercial sector (possibly related to moderate winter temperatures in 2020). In contrast, consumption in the electric utility sector increased slightly (0.5%) in 2020. For the first time since the early 1980s, Utah consumed more gas than it produced in 2020 and is no longer a net-exporter.

Coal

Production At the end of 2020, Utah has six active coal mines, the fewest number since mining operations in Utah began nearly 150 years ago. Overall, coal production is expected to decrease by 8% in 2020 to 13.2 million short tons, well below the 24.5 million tons averaged in the 2000s. Declining Utah coal production started during the 2008 recession, but demand has not rebounded like other energy commodities since coal has dropped out of favor as a fuel for electric and industrial needs. Production at the two remaining Wolverine mines—Skyline and Sufco—accounted for 63% (8.3 million tons) of Utah's total coal production; Wolverine's Dugout mine was idled in fall 2019 (production from this mine was minor, only about 500,000 per year, compared with Skyline and Sufco). Emery County Coal Resources took over ownership of the Lila Canyon mine in 2020 and produced 3.1 million tons of coal. Rhino Resources, the owner of the Castle Valley mines, went into bankruptcy in mid-2020 and its mines were bought by COP Coal Development, which produced 700,000 tons in 2020. The Coal Hollow mine in southern Utah ramped up production to 600,000 tons in 2020 from their surface mine after receiving long-sought federal coal leases. Bronco Energy's Emery mine produced about 500,000 tons of coal in 2020, down slightly from the 700,000 tons produced in 2019.

Prices and Value The average mine-mouth price for Utah coal decreased slightly to about $37 per short ton in 2020, still a relatively high price in nominal dollars but well below the inflation-adjusted high of $103 per ton reached in 1976. The end-use price of coal at Utah electric utilities, which includes transportation costs, increased slightly to $43 per ton in 2020. The value of coal produced in Utah totaled $488 million in 2020, 10% lower than 2019, and well below the inflation-adjusted high of $1.3 billion recorded in 1982.

Consumption Approximately 11 million short tons of coal was consumed in Utah in 2020, 97% of which was burned at electric utilities. Demand for coal in Utah dropped 17% between 2015 and 2016, then remained steady until 2020 when it dropped another 11%. Coal sales for industrial use mostly by cement and lime producers dropped to roughly 350,000 tons per year, a quarter of peak demand of 1.4 million tons reached in 2005. Utah was a significant net exporter of coal, but out-of-state domestic demand has dropped from a high of 16 million tons in 2001 down to about 1.5 million tons in 2020. Utah's foreign exports peaked in the mid-1990s at about 5 million tons, then dropped to near zero in the mid-2000s. Demand from the foreign market has increased over the last decade, totaling an estimated 2 million tons in 2020; however, overseas transportation options are limited.

Electricity (Including Renewable Resources)

Production Electricity generation in Utah decreased 4.6% to 37,310 gigawatthours (GWh) in 2020, nearly all of which was a result of lower generation at Utah's coal fired power plants. Overall, 2020 generation is about 20% below peak generation reached in 2008. Reductions in electricity generation over the past 12 years are the result of recession-related and pandemic-related decreases in demand, increased energy efficiency measures, an exponential increase in residential rooftop solar, and a reduction in demand for coal-fired generation from out-of-state users such as California. Coal-fired electric generation once dominated Utah's electric portfolio, providing 94% of electric generation in 2005. In 2020, coal accounted for only 62% of electric generation; significant increases in natural gas generation (26%) and renewable sources (12%) have broadened Utah's generation portfolio. The largest change in Utah's electricity sector is the recent exponential increase in utility-scale PV solar capacity. Between mid-2015 and the end of 2016, 855 MW of utility-scale solar capacity came online, more than wind, hydroelectric, geothermal, and biomass combined. By the end of 2020, an additional 400 MW of solar should be online with another 1000+ MW in development. Solar now accounts for 6.0% of Utah's total electric generation. In contrast, Utah's fleet of coal-fired power plants has experienced a nearly 40% reduction in net generation since 2008.

Prices The overall price of electricity in Utah has remained mostly steady over the past eight years. Utah's 2020 average electric rate of 8.4 cents per kilowatt-hour (kWh) for all sectors of the economy is 21% lower than the national average of 10.7 cents. This lower rate is mostly attributed to Utah's established fleet of coal-fired power plants, which still supply 62% of electricity generation in the state, as well as low natural gas prices. The residential price of Utah's electricity increased a modest 1.9% in 2020 to 10.6 cents per kWh, which is lower than the national average of 13.2 cents per kWh.

Consumption In general, from 1980 to 2013, electricity consumption averaged a 3.3% increase annually, mirroring Utah's population rate increase (2.1% per year) combined with the increasing rate of consumption per capita (1.3% per year). However, after an initial 1.4% decrease from 2013 to 2014, total electricity consumption climbed more slowly to reach a new record high in 2018 of 31,242 GWh, before falling 0.3% in 2019 and 0.8% in 2020. The slow-down in electricity consumption is related to the implementation of energy efficiency measures plus a dramatic increase in residential rooftop solar. Pandemic restrictions played a role in redistributing demand in 2020; residential demand increased 5.8% as Utahns spent more time at home, whereas commercial demand decreased 6.8% as many businesses had to temporarily close. Industrial demand stayed steady as industrial services continued through the shutdowns. Utah remains a net exporter of electricity, using 83% of in-state electric generation.

2021 OUTLOOK

Production and Consumption 2020 was dominated by the impact of the COVID-19 pandemic on Utah's energy industry. The uncertain outlook for 2021 will be determined by the availability and effectiveness of a vaccine and the eventual return to a more normal life. Oil prices in Utah will most likely linger in the low- to mid-$30 range as uncertainty in the petroleum market continues; high enough for minor drilling but far from the prices needed for extensive oil field development and significant increased oil production. Demand for petroleum products is projected to increase in 2021 as travel restrictions are lifted and people feel more comfortable leaving their homes. Looking to the future, plans have been proposed to build a railway spur into the Uinta Basin; the federal Surface Transportation Board recently released a draft Environmental Impact Statement (EIS) that is currently (December 2020) out for public comment. If approved and financed, the proposed railway could open new out-of-state markets for Utah's crude oil, creating potential for increased crude oil production.

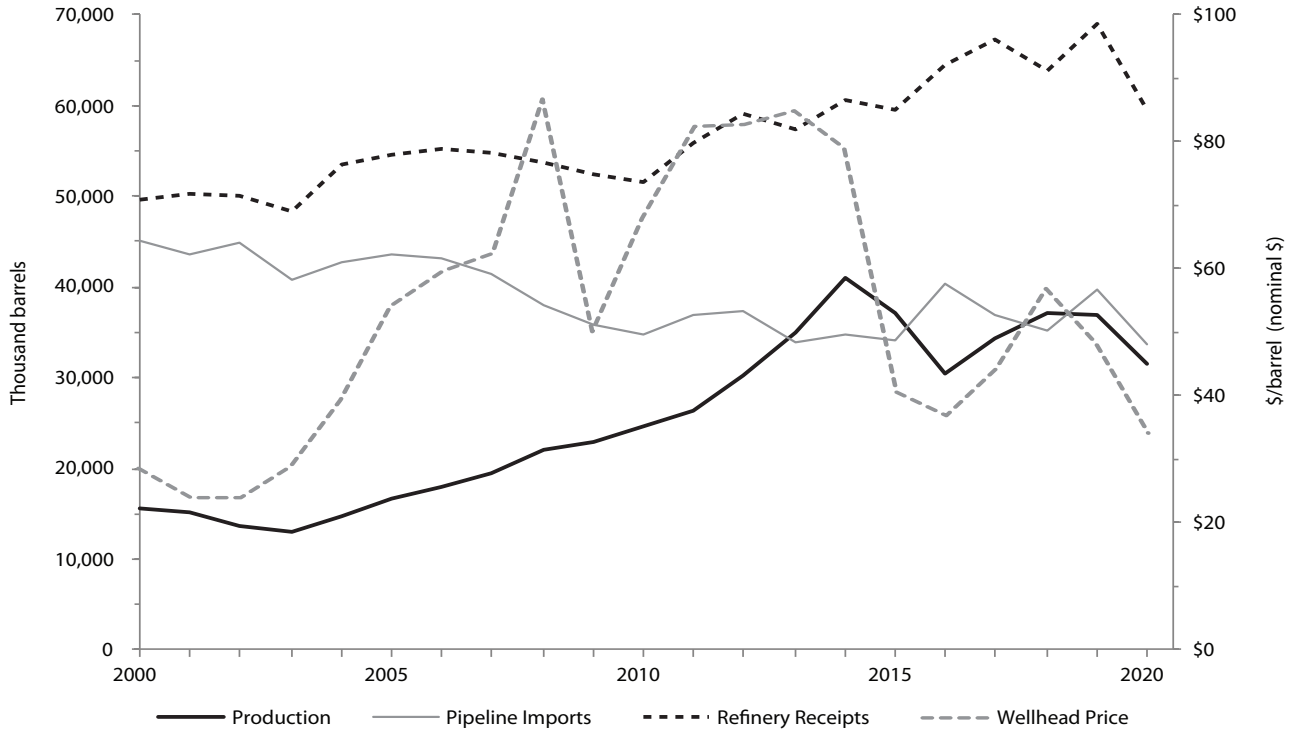
The COVID-19 pandemic exacerbated the problems faced by the already struggling natural gas industry. Production for natural gas in Utah will continue to fall, albeit not as sharply as years prior, as prices remain below $3 per Mcf. Although Utah had record high consumption of natural gas in 2019, U.S. supply remains high and prices have stayed low. Several groups have sought new markets for Rocky Mountain natural gas to help alleviate the oversupply, including access to proposed liquefied natural gas (LNG) facilities in Oregon and Baja California, Mexico, to tap into Asian markets.

Coal production in Utah is expected to remain in the 13- to 14-million-ton per year range for the near future, as in-state demand has stabilized around 11 to 12 million tons a year, and out-of-state demand continues to be weak (less than 2 million tons per year). This current supply-demand balance will change in a few years when the coal-fired Intermountain Power Plant will convert to natural gas and hydrogen, removing demand for 3 to 4 million tons of coal from the Utah market. Utah coal deliveries to the foreign export market have experienced a modest jump in the past few years, and potential remains for access to a strong overseas market which could push production higher in coming years. West Coast port facilities are vital for accessing the Asian coal market, but current capacity at existing ports is limited and additional capacity could be a challenge to build.

Utah's electric generation portfolio continues to evolve as demand for carbon-neutral electricity increases and several new utility-scale solar farms are installed in 2021 and beyond. This intensified emphasis on renewable energy has spurred research and development into large-scale electric storage facilities (e.g., compressed air storage in salt domes near Delta, Utah), the generation of electricity from "renewable" natural gas sources (e.g., large-scale anaerobic digesters), the continued development of enhanced geothermal systems at the Frontier Observatory for Research into Geothermal Energy (FORGE) site in central Utah, and the production of carbon-neutral hydrogen for electricity generation or vehicle fuel. Consumption of electricity should only modestly increase in the next few years as more rooftop solar is installed (offsetting residential demand) and energy efficiency measures continue to offset demands from a growing population.

Prices Uncertainties linger about when and if crude oil prices might return to pre-pandemic levels. Utah prices will likely remain in the $30–$40 range for the foreseeable future as the worldwide supply-demand balance equilibrates. The price of natural gas has remained in the mid- to upper $2-per-Mcf range for the past five years before dipping below $2 in 2020. Projections indicate the price will likely stay in the $2 to $3 range. Utah's mine-mouth coal price will remain relatively flat and is expected to average in the mid-$30-per-ton range in coming years. Despite recent changes, Utah's well-established coal-fired power plants (which still provide 62% of Utah's electricity generation), as well as an established fleet of natural-gas plants and nearly 1.5 gigawatts of new solar capacity, will assure affordable, reliable electric power for the near future and keep Utah's electricity prices nearly 20% below the national average.

Figure 17.1: Utah's Crude Oil Production, Pipeline Imports, and Refinery Receipts Plotted with Wellhead Price, 2000–2020



Source: Utah Geological Survey, Utah Division of Oil, Gas and Mining; U.S. Energy Information Administration, Baker Hughes (rig data)

Table 17.1: Supply, Disposition, Price, and Value of Crude Oil in Utah

	Supply[1] (Thousand barrels)				Drilling	Disposition (Thousand barrels)				Price	Value
Year	UT Crude Prod.	CO Imports	WY Imports	Canadian Imports	Avg. # of rigs operating in Utah	Utah Crude Exports[2]	Refinery Receipts	Refinery Inputs	Refinery Beginning Stocks	Wellhead ($/barrel)	Value of Utah Crude Oil (Million $)
2000	15,608	7,163	26,367	11,528	15	10,950	49,716	49,999	786	$28.53	$445
2001	15,271	7,208	25,100	11,364	21	8,633	50,310	50,143	457	$24.09	$368
2002	13,770	7,141	25,455	12,215	13	8,619	49,962	49,987	591	$23.87	$329
2003	13,096	6,964	24,152	9,690	14	5,635	48,267	48,284	547	$28.88	$378
2004	14,742	7,559	22,911	12,195	22	4,007	53,400	53,180	532	$39.35	$580
2005	16,675	8,214	24,372	10,991	28	5,739	54,513	54,544	767	$53.98	$900
2006	17,926	9,355	23,256	10,633	40	6,051	55,119	55,192	728	$59.70	$1,070
2007	19,534	10,708	22,012	8,769	41	6,258	54,764	54,952	662	$62.48	$1,220
2008	22,040	10,259	21,316	6,382	42	6,360	53,637	53,165	473	$86.58	$1,908
2009	22,941	7,409	23,000	5,520	18	6,395	52,475	52,479	519	$50.22	$1,152
2010	24,666	6,525	24,000	4,278	27	7,832	51,637	51,678	511	$68.09	$1,679
2011	26,276	6,997	26,050	3,894	28	7,318	55,900	55,656	473	$82.53	$2,169
2012	30,204	7,805	25,118	4,394	37	8,368	59,153	58,961	692	$82.73	$2,499
2013	35,002	7,601	23,124	3,111	29	11,493	57,345	56,921	669	$84.79	$2,968
2014	40,914	7,662	23,425	3,636	25	15,090	60,548	60,677	798	$79.04	$3,234
2015	37,136	7,048	22,211	4,963	7	11,809	59,549	59,568	660	$40.69	$1,511
2016	30,528	7,110	27,318	5,873	3	6,348	64,482	64,496	719	$36.92	$1,127
2017	34,438	5,763	26,187	4,967	9	4,043	67,311	67,526	826	$44.24	$1,524
2018	37,117	5,616	23,819	5,803	7	8,575	63,780	63,805	730	$56.85	$2,110
2019	36,934	5,253	26,059	8,308	6	7,487	69,067	69,033	821	$48.32	$1,785
2020e	31,600	4,800	22,000	6,900	3	5,800	59,500	60,300	978	$34.00	$1,074

e = estimate

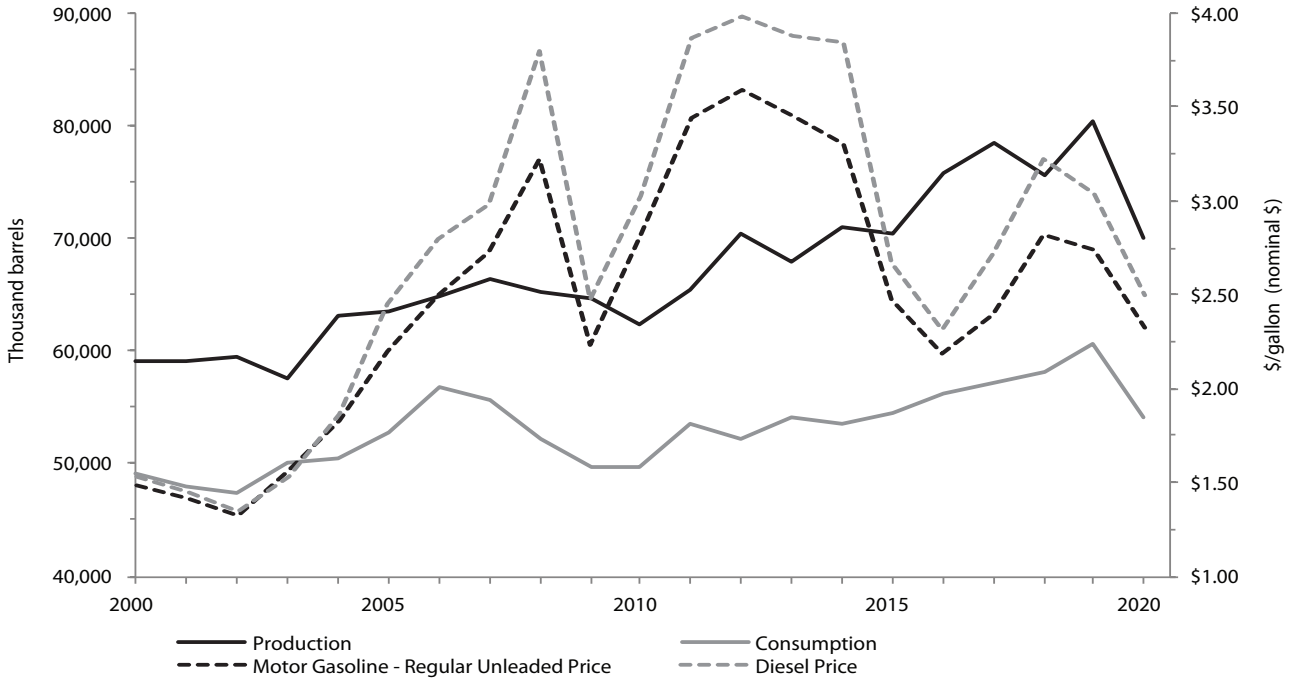
1Out-of-state imports only include pipeline shipments; minor imports may arrive by truck, and additional minor imports may come from other states.

2Estimated by subtracting refinery receipts from total supply; all crude oil imports are assumed to be accounted for.

Note: Prices and values are in nominal dollars.

Source: Utah Geological Survey; Utah Division of Oil, Gas and Mining; U.S. Energy Information Administration, Baker Hughes (rig data)

Figure 17.2: Utah's Petroleum Product Production and Consumption Plotted with Motor Gasoline and Diesel Prices, 2000–2020



Source: Utah Geological Survey, U.S. Energy Information Administration, Federal Energy Regulatory Agency

Table 17.2: Supply, Disposition, and Select Prices of Petroleum Products in Utah

	Supply (Thousand barrels)			Consumption by Product (Thousand barrels)					Exports	Prices ($/gallon)	
Year	Refined Product Production	Refinery Beg. Stocks	Refined Prod. Pipeline Imports[1,2]	Motor Gasoline	Jet Fuel	Distillate Fuel	All Other	Total	Pipeline Exports to Other States[1,3] (Thousand barrels)	Motor Gasoline - Regular Unleaded	Diesel
2000	59,125	2,426	14,568	23,895	7,701	10,629	6,954	49,179	22,811	$1.48	$1.53
2001	59,094	2,306	15,764	22,993	6,880	11,236	6,904	48,013	23,937	$1.41	$1.45
2002	59,514	2,739	16,848	24,158	6,416	11,482	5,394	47,450	24,082	$1.32	$1.34
2003	57,511	2,846	16,515	24,325	6,758	12,082	6,917	50,082	22,729	$1.56	$1.54
2004	63,071	2,599	18,486	24,744	7,137	12,264	6,289	50,434	24,475	$1.82	$1.87
2005	63,487	2,806	20,258	24,677	7,394	13,717	7,015	52,803	24,482	$2.20	$2.45
2006	64,806	2,587	18,976	25,312	7,560	17,292	6,699	56,863	23,321	$2.50	$2.80
2007	66,443	2,924	15,991	26,054	7,085	15,946	6,465	55,550	22,851	$2.73	$2.98
2008	65,178	2,513	14,854	25,051	6,509	14,138	6,415	52,113	21,619	$3.22	$3.79
2009	64,752	2,715	13,138	25,324	5,751	12,852	5,854	49,781	21,043	$2.23	$2.48
2010	62,310	2,665	12,307	24,761	5,875	12,707	6,366	49,709	21,490	$2.82	$3.03
2011	65,369	2,689	11,383	25,568	5,767	15,448	6,771	53,554	23,058	$3.44	$3.87
2012	70,456	2,860	13,316	25,228	5,572	14,776	6,693	52,269	26,695	$3.59	$3.98
2013	67,892	3,077	15,204	26,085	6,399	15,317	6,361	54,162	26,654	$3.45	$3.88
2014	70,931	2,676	13,853	26,469	5,716	15,169	6,263	53,617	27,260	$3.30	$3.85
2015	70,385	2,980	16,615	27,776	6,204	14,293	6,157	54,430	28,972	$2.47	$2.67
2016	75,780	2,771	16,402	28,535	6,944	14,248	6,564	56,291	30,966	$2.19	$2.31
2017	78,473	2,652	15,530	28,769	6,678	15,043	6,743	57,233	32,666	$2.39	$2.71
2018	75,506	2,918	15,876	28,725	7,080	15,700	6,647	58,152	31,164	$2.82	$3.22
2019*	80,371	2,762	16,370	30,100	7,555	16,000	6,900	60,555	33,025	$2.74	$3.04
2020e	70,000	3,316	14,900	27,300	4,600	15,900	6,300	54,100	27,900	$2.32	$2.50

*Consumption was estimated.

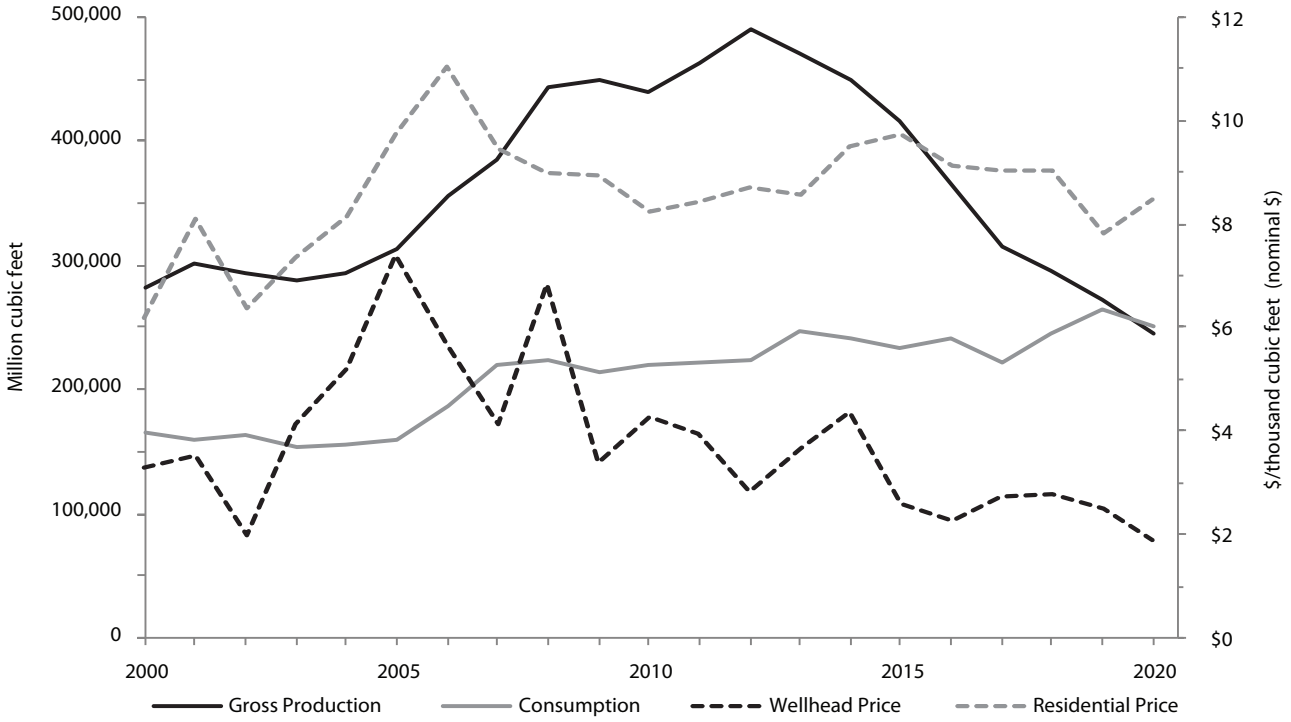
e = estimate

1. Amounts shipped by truck are unknown.
2. The Pioneer pipeline, originating from Sinclair, Wyoming, is the only pipeline importing petroleum products into Utah.
3. Prior to 2012, only the Chevron Petroleum pipeline exported product to the northwest (Idaho and Washington); in 2013 this line was sold to Tesoro. Starting in 2012, the UNEV pipeline started shipping product to the Las Vegas area; however, a minor amount of product is offloaded near Cedar City (amount estimated).

Note: Prices are in nominal dollars.

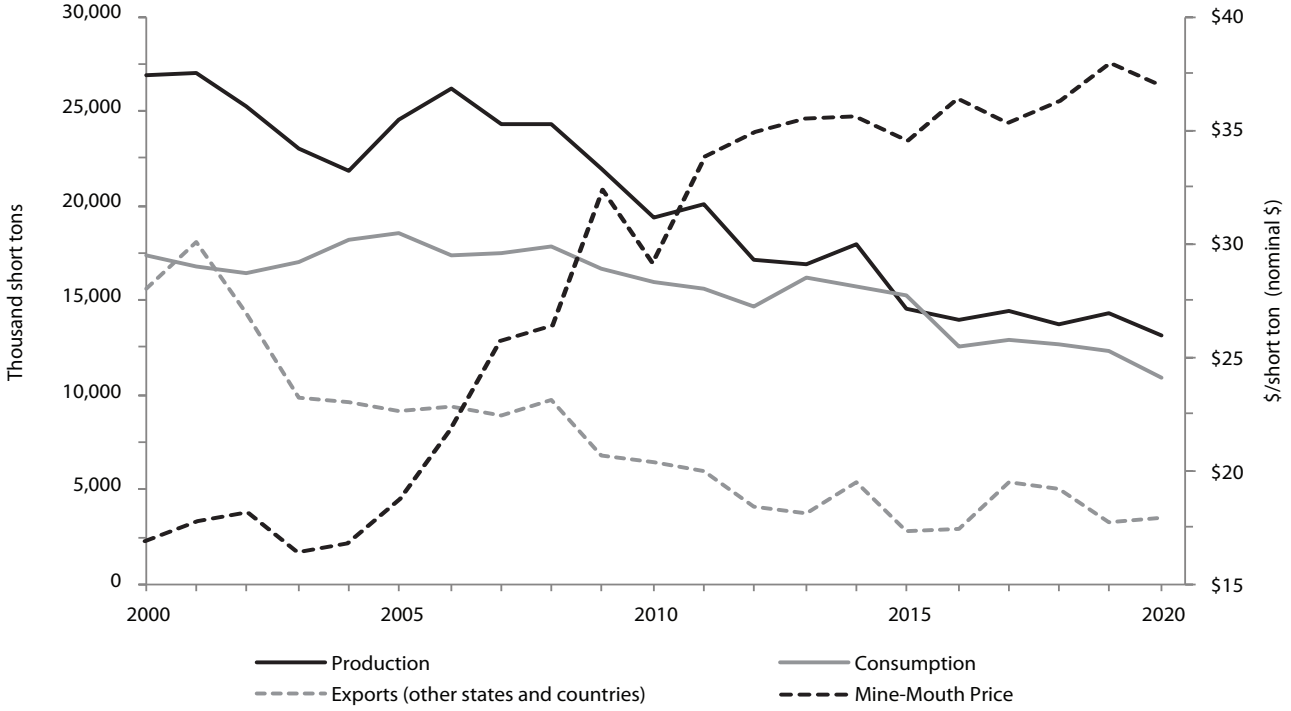
Source: Utah Geological Survey, U.S. Energy Information Administration, Federal Energy Regulatory Agency

Figure 17.3: Utah's Natural Gas Production and Consumption Plotted with Wellhead and Residential Prices, 2000–2020



Source: Utah Geological Survey; Utah Tax Commission; Utah Division of Oil, Gas and Mining; U.S. Energy Information Administration

Figure 17.4: Utah's Coal Production, Consumption, and Exports Plotted with Mine-Mouth Price, 2000–2020



Source: Utah Geological Survey, U.S. Energy Information Administration

Table 17.3: Supply, Disposition, Prices, and Value of Natural Gas in Utah

Year	Production				Consumption by End Use (Million cubic feet)							Prices ($/thousand cubic feet)					Value
	Gross Production (Million cubic feet)	Dry Production (Million cubic feet)	Actual Sales (Million cubic feet)	Natural Gas Liquids Production (Thousand bbl)	Residential	Commercial	Vehicle Fuel	Industrial	Electric Utilities	Lease, Plant, & Pipeline	Total	Wellhead	End-Use Residential	End-Use Commercial	End-Use Industrial	Natural Gas Liquids ($/bbl)	Value of NG and NGL (Million $)
2000	281,170	256,490	140,226	5,150	55,626	31,282	848	39,378	10,544	27,344	165,022	$3.31	$6.20	$4.92	$3.93	$11.31	$907
2001	300,966	272,534	219,138	4,641	55,008	30,917	474	33,584	15,141	24,175	159,300	$3.54	$8.09	$6.78	$5.29	$12.47	$1,023
2002	293,030	271,387	250,172	3,542	59,398	33,501	482	26,879	15,439	27,681	163,380	$1.99	$6.39	$5.20	$3.91	$8.91	$572
2003	287,141	264,654	224,327	3,080	54,632	30,994	589	25,200	14,484	28,226	154,125	$4.12	$7.33	$5.95	$5.04	$12.18	$1,128
2004	293,807	274,588	253,855	3,196	60,527	31,156	661	26,674	9,423	27,450	155,891	$5.22	$8.12	$6.75	$5.90	$19.66	$1,496
2005	313,491	298,408	269,062	2,310	58,044	34,447	187	25,370	12,239	29,989	160,276	$7.40	$9.71	$8.23	$7.33	$32.31	$2,283
2006	356,339	345,409	320,163	1,925	60,017	34,051	186	29,076	28,953	35,116	187,399	$5.69	$11.02	$9.61	$8.02	$31.40	$2,026
2007	385,517	373,680	350,285	1,769	60,563	34,447	209	31,578	56,438	36,464	219,699	$4.14	$9.44	$8.03	$6.35	$45.16	$1,627
2008	442,524	430,286	382,960	2,564	65,974	37,612	208	33,112	55,374	31,907	224,187	$6.82	$9.00	$7.74	$7.21	$68.15	$3,109
2009	449,675	435,673	390,475	4,817	65,184	37,024	149	29,845	49,984	32,034	214,220	$3.38	$8.95	$7.57	$5.62	$38.87	$1,660
2010	439,929	422,067	387,593	5,869	66,087	38,461	203	32,079	48,399	33,985	219,214	$4.25	$8.22	$6.83	$5.57	$49.98	$2,087
2011	462,495	442,615	406,323	7,571	70,076	40,444	290	33,633	40,138	37,646	222,227	$3.92	$8.44	$7.05	$5.50	$60.99	$2,197
2012	490,575	474,756	436,090	8,106	59,801	35,363	289	36,350	47,138	44,098	223,039	$2.82	$8.70	$7.00	$4.69	$50.49	$1,748
2013	470,349	455,454	409,704	8,132	70,491	41,398	224	38,009	49,562	47,602	247,286	$3.68	$8.55	$7.13	$5.22	$54.03	$2,115
2014	450,024	435,893	391,536	9,693	62,458	38,156	256	38,330	58,780	43,758	241,738	$4.35	$9.48	$7.71	$5.87	$46.13	$2,343
2015	417,023	401,722	360,018	7,286	58,562	35,772	326	37,189	56,449	44,315	232,613	$2.60	$9.72	$7.97	$5.93	$22.84	$1,213
2016	365,281	352,437	319,056	5,573	63,929	39,066	305	38,568	59,684	38,562	240,114	$2.24	$9.12	$7.43	$5.52	$25.51	$932
2017	315,197	304,266	278,015	4,813	66,700	41,264	354	40,007	40,830	32,679	221,834	$2.72	$9.05	$7.40	$5.51	$31.94	$981
2018	295,825	284,264	249,763	3,817	67,415	42,367	348	39,935	61,161	32,831	244,057	$2.77	$9.04	$7.37	$5.31	$46.33	$964
2019	272,752	262,219	218,137	3,975	75,938	47,336	324	41,348	67,774	31,328	264,048	$2.50	$7.82	$6.35	$5.00	$23.97	$751
2020e	245,000	236,000	200,000	3,300	69,400	41,200	390	40,300	68,100	31,500	250,890	$1.90	$8.45	$6.90	$5.10	$20.00	$514

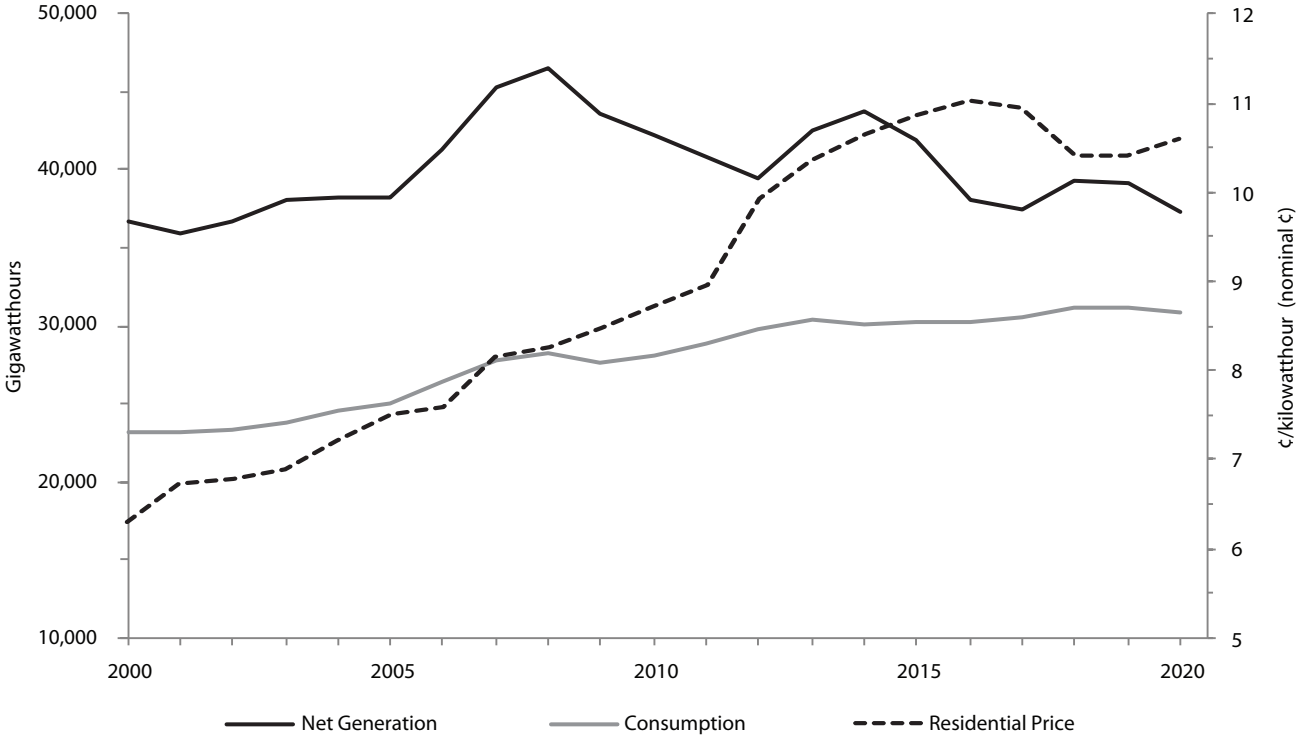
e = estimate
NG = natural gas, NGL = natural gas liquids, bbl = barrels
Note: Prices and values are in nominal dollars.
Source: Utah Geological Survey; Utah Tax Commission; Utah Division of Oil, Gas and Mining; U.S. Energy Information Administration

Table 17.4, Supply, Disposition, Price, and Value of Coal in Utah

	Supply (Thousand short tons)		Distribution (Thousand short tons)	Consumption by End Use (Thousand short tons)					Exports (Thousand short tons)		Prices ($/short ton)		Value (Million $)
Year	Production	Imports	Total Distribution of Utah Coal	Residential & Commercial	Coke Plants	Other Industrial	Electric Utilities	Total	To Other U.S. States	To Canada and/or Overseas	Mine Mouth	End-Use Electric Utilities	Value of Utah Coal
2000	26,920	2,535	27,955	59	984	1,166	15,164	17,373	12,553	3,073	$16.93	$23.16	$456
2001	27,024	3,062	26,906	60	547	1,235	14,906	16,748	15,920	2,144	$17.76	$25.48	$480
2002	25,299	2,251	24,392	198	0	592	15,644	16,434	13,170	1,142	$18.20	$21.84	$460
2003	23,069	2,039	23,551	61	0	611	16,302	16,974	9,584	318	$16.36	$23.20	$377
2004	21,818	3,033	23,145	214	0	1,330	16,606	18,150	9,294	346	$16.82	$24.95	$367
2005	24,556	2,776	23,025	45	0	1,431	17,118	18,594	8,835	351	$18.71	$24.52	$459
2006	26,131	1,925	24,520	35	0	680	16,609	17,324	9,279	55	$21.77	$27.34	$569
2007	24,288	1,596	24,451	23	0	911	16,593	17,527	8,877	0	$25.69	$30.33	$624
2008	24,275	2,528	25,426	0	0	873	16,927	17,800	9,219	541	$26.39	$30.66	$641
2009	21,927	4,251	20,487	0	0	718	15,925	16,643	6,643	148	$32.32	$33.96	$709
2010	19,406	1,775	19,220	0	0	717	15,233	15,950	5,807	634	$29.15	$37.68	$566
2011	20,073	2,020	19,039	0	0	598	15,005	15,603	4,841	1,081	$33.80	$39.21	$678
2012	17,155	1,708	16,140	0	0	588	14,084	14,672	3,012	1,080	$34.92	$41.84	$599
2013	16,953	1,864	16,896	0	0	645	15,529	16,174	2,673	1,110	$35.52	$44.73	$602
2014	17,933	1,967	17,829	0	0	614	15,062	15,676	2,543	2,869	$35.59	$46.03	$638
2015	14,513	3,098	14,938	0	0	662	14,580	15,242	2,116	735	$34.53	$42.12	$501
2016	13,978	1,908	14,620	0	0	575	12,001	12,576	1,890	1,049	$36.40	$41.36	$509
2017	14,417	2,314	15,020	0	0	485	12,438	12,923	2,242	3,123	$35.28	$41.56	$509
2018	13,753	1,907	14,084	0	0	378	12,332	12,710	1,907	3,148	$36.31	$42.83	$499
2019	14,347	1,800	13,496	0	0	382	11,891	12,273	2,071	1,228	$37.95	$41.77	$544
2020e	13,200	2,000	13,300	0	0	350	10,600	10,950	1,500	2,000	$37.00	$43.46	$488

e = estimate
Note: Prices and values are in nominal dollars.
Source: Utah Geological Survey, U.S. Energy Information Administration

Figure 17.5: Utah's Electricity Net Generation and Consumption Plotted with End-Use Residential Price, 2000–2020



Source: Utah Geological Survey, U.S. Energy Information Administration

Table 17.5: Supply, Disposition, and Price of Electricity in Utah

	Net Generation by Fuel Type (Gigawatthours)										Consumption by End Use (Gigawatthours)					Prices by End Use (¢/kilowatthour)			
Year	Coal	Petroleum	Natural Gas	Hydro	Geo-thermal	Wind	Solar	Biomass1	Other2	Total	Residential	Commercial	Industrial	Total	Residential Consumption Per Capita (MWh/person)	Residential	Commercial	Industrial	All Sectors
2000	34,491	58	890	746	186	0	0	9	258	36,639	6,514	8,754	7,917	23,185	2.90	6.3	5.2	3.4	4.8
2001	33,679	58	1,446	508	186	0	0	5	4	35,887	6,693	9,113	7,411	23,217	2.92	6.7	5.6	3.5	5.2
2002	34,488	54	1,380	458	247	0	0	6	5	36,638	6,938	9,309	7,019	23,267	2.98	6.8	5.6	3.8	5.4
2003	35,979	33	1,383	421	198	0	0	5	4	38,024	7,166	9,048	7,646	23,860	3.02	6.9	5.6	3.8	5.4
2004	36,618	33	910	450	195	0	0	4	3	38,212	7,325	9,370	7,816	24,512	3.01	7.2	5.9	4.0	5.7
2005	35,970	41	1,178	784	185	0	0	4	3	38,165	7,567	9,444	7,989	25,000	3.02	7.5	6.1	4.2	5.9
2006	36,856	62	3,389	747	191	0	0	15	5	41,263	8,232	9,778	8,356	26,366	3.20	7.6	6.2	4.2	6.0
2007	37,171	39	7,424	539	164	0	0	31	5	45,373	8,752	10,275	8,759	27,785	3.32	8.2	6.5	4.5	6.4
2008	38,020	44	7,366	668	254	24	0	24	179	46,579	8,786	10,319	9,086	28,192	3.26	8.3	6.7	4.6	6.5
2009	35,526	36	6,444	835	279	160	0	48	215	43,543	8,725	10,268	8,594	27,587	3.19	8.5	7.0	4.8	6.8
2010	34,057	50	6,455	696	277	448	0	56	210	42,249	8,834	10,402	8,808	28,044	3.19	8.7	7.2	4.9	6.9
2011	33,138	54	5,256	1,230	330	573	0	58	197	40,836	8,947	10,579	9,333	28,859	3.17	9.0	7.4	5.1	7.1
2012	30,799	40	6,580	748	335	704	2	60	137	39,403	9,188	10,841	9,694	29,723	3.21	9.9	8.1	5.6	7.8
2013	34,285	26	6,606	505	319	540	2	71	163	42,517	9,402	11,062	10,010	30,474	3.24	10.4	8.3	5.9	8.2
2014	33,377	24	8,376	633	522	660	2	73	118	43,785	8,964	11,114	9,965	30,043	3.05	10.7	8.5	6.1	8.4
2015	31,656	20	8,218	769	430	626	32	85	114	41,949	9,117	11,670	9,405	30,192	3.04	10.9	8.6	6.2	8.5
2016	25,939	32	8,691	760	485	822	1,054	84	267	38,134	9,371	11,622	9,187	30,180	3.07	11.0	8.8	6.3	8.7
2017	26,390	38	5,871	1,294	481	858	2,211	78	191	37,412	9,511	11,795	9,283	30,589	3.05	11.0	8.7	6.1	8.6
2018	25,912	37	8,724	927	446	795	2,224	79	232	39,375	9,715	12,135	9,393	31,242	3.07	10.4	8.2	5.9	8.2
2019	25,241	40	9,369	875	310	819	2,186	71	206	39,117	9,740	11,912	9,491	31,143	3.02	10.4	8.3	6.0	8.2
2020e	23,200	40	9,600	930	350	750	2,250	80	110	37,310	10,300	11,100	9,500	30,900	3.15	10.6	8.5	6.0	8.4

e = estimate
MWh = megawatthours
1Includes landfill gas, biogenic municipal solid waste, and other biogenic gases.
2Includes blast furnace gas, propane gas, and other manufactured and waste gases derived from fossil fuels, as well as nonbiogenic municipal solid waste.
Note: Prices are in nominal dollars.
Source: Utah Geological Survey, U.S. Energy Information Administration

Minerals

18

Andrew Rupke, Utah Geological Survey
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2020 SUMMARY

The Utah Geological Survey (UGS) projects an estimated gross production value of metallic and industrial mineral commodities of $3.3 billion in 2020, a decrease of about 4% from the $3.4 billion value in 2019. However, 2020 projections come with higher than normal uncertainty because of the COVID-19 pandemic.

The U.S. Geological Survey reports the 2019 value of Utah's nonfuel (metallic and industrial) minerals production ranks seventh nationally, accounting for 3.9% of the total U.S. nonfuel minerals production. The UGS's 2020 production values are derived primarily from annual industry production surveys, corporate quarterly reports, and discussions with mining industry professionals.

Utah's 2020-estimated $3.3 billion total includes a metals value of $1.9 billion (58%) and an industrial minerals value of $1.4 billion (42%). Utah's base metal production includes copper, molybdenum, magnesium, and beryllium in decreasing order of importance. Gold is Utah's top precious metal, followed by silver. Utah also produces a long list of industrial mineral commodities including potash, salt, sand and gravel, crushed stone, portland cement, lime, limestone, phosphate, gilsonite, gypsum, and a variety of other mineral products.

Rio Tinto's Bingham Canyon open-pit mine remains the most important contributor to base and precious metal production in the state. Bingham is consistently the leading producer of copper and gold in Utah, and in 2019 was the only producer of silver and molybdenum. In December 2019, Rio Tinto announced a $1.5 billion investment in a second phase of the south wall pushback, the first $900 million phase of which is due to be completed in 2021. The second phase of the south wall pushback is expected to extend mine life to 2032. Both mined and refined copper production in 2020 were strongly impacted by the Magna earthquake in March, which damaged the flash converting furnace. The furnace required a full rebuild, and the smelter was also shut down for planned maintenance from May to June, after which there were delays restarting. Maintenance and repairs are now complete, and the refinery stream is expected to return to previous capacity by the end of the year. As a result of variable copper and precious metal grade in the current east wall mining and the extended smelter shut down, mined copper output has dropped by nearly one-third and refined copper output has dropped by over two-thirds. Copper and precious metal grades are expected to remain low until mining shifts to the south wall in 2021, though high molybdenum grade and recovery from the east wall will help offset the decrease in copper grade.

Lisbon Valley copper mine produced minor copper in 2019 from reprocessing existing leach pad material. No active mining took place. Future mine plans focused on progressing a plan for in-situ mining, which would allow mining of deeper parts of the ore body. However, in March 2020 funding for the mine fell through and the mine was abruptly shut down, resulting in a repeal of active mining permits and access of the surety bond to prevent any environmental damage from the cessation of operations. Lisbon Valley Mining Company has since secured funding and is currently reapplying for a mine permit with intentions to begin operations again in 2021.

US Magnesium continues to be the only producer of magnesium metal in the United States but is currently producing below capacity due in part to the 2016 closure of the adjacent titanium plant, an important consumer of magnesium. Materion Resources' Spor Mountain mining district in Juab County continued as a global leader of beryllium, producing 65% of global beryllium in 2019. Beryllium production is expected to remain relatively consistent in 2020 and 2021.

Based on available information and company projections, change in production of most

industrial mineral commodities from 2019 to 2020 will not be significant. However, U.S. Geological Survey data for the first half of 2020 indicate that construction aggregate production in Utah was up significantly (nearly 22%) compared to the first half of 2019. Construction aggregate, consisting of sand and gravel and crushed stone, is one of the more significant commodities in Utah and is an indicator of the overall construction market. However, the increase in aggregate production in the first half of 2020 is likely to be tempered somewhat in the second half of 2020 by the pandemic. If the construction industry experiences significant slowing due to the pandemic some of Utah's other industrial mineral markets such as cement, lime, and gypsum could experience decreases as well.

Metals exploration experienced significant disruption with the onset of the COVID-19 pandemic in early 2020; however, given improved commodity prices, many projects restarted by summer. Major drilling programs have taken place in the San Francisco, greater Tintic, Deer Trail, and Drum Mountain districts (Beaver, Juab, and Piute Counties) with additional active exploration projects in Emery, Garfield, Grand, Iron, Utah, Millard, Salt Lake, San Juan, Tooele, and Washington Counties. Overall exploration drilling footage is expected to increase from 2019 to 2020. Base and precious metals exploration, particularly for copper and gold, remains consistently active in Utah, and there was an increase in exploration activity for vanadium and uranium projects in 2020.

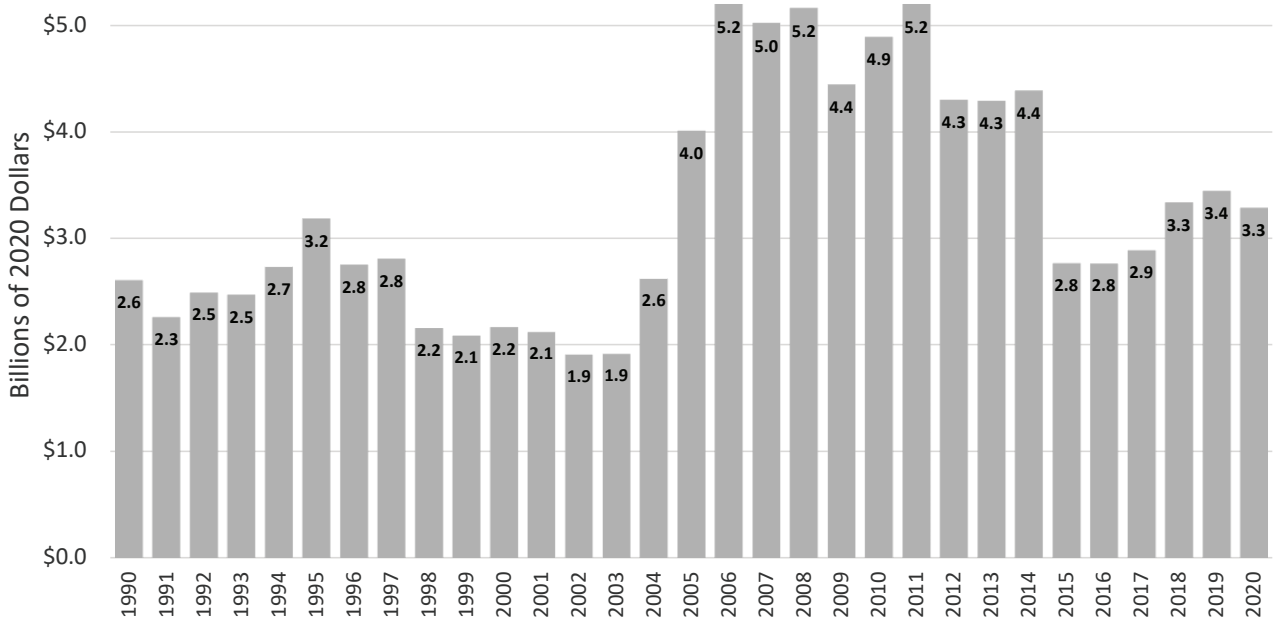
After completing significant permitting milestones in 2018 and 2019, including receiving a Record of Decision from the U.S. Bureau of Land Management, Crystal Peak Minerals' potash project at Sevier Lake in Millard County failed to attract sufficient capital investment to move the project forward and meet contractual requirements of a major creditor. Crystal Peak Minerals' plan for the project was to produce potassium sulfate, a more valuable type of potash than the typical potassium chloride. The future of the project is unclear. Earlier in the decade, several potash exploration projects were active in Utah, but interest in potash overall has waned due to lower prices and changing market dynamics.

Other industrial mineral exploration and development in Utah has focused on fluorspar, frac sand, and lithium. Utah is poised to become the nation's only producer of fluorspar, a designated critical mineral. Ares Strategic Mining is reviving the Lost Sheep Mine, Utah's largest historical producer of fluorspar. They are working towards expanding the resource at the mine and restarting production. Interest in frac sand is a response to the oil and gas industry's trend of using increasing amounts of sand in hydraulic fracturing of wells. Several areas in Utah have been investigated for frac sand resources in recent years, but current interest is focused on the Uinta Basin. One project near Vernal began producing in late 2019 and other potential deposits in the area are being investigated. Recent reductions in oil demand may slow development of other projects. Due to rising demand and prices at the time, a brief lithium boom led to several thousand lithium claims being filed in 2016 and 2017 on Utah BLM land, but activity has dropped off since then. However, one company, Anson Resources, continues to pursue a potential lithium resource in subsurface brines of the Paradox Basin. Anson has been re-entering old oil and gas wells in the Paradox Basin to test lithium concentrations in brines with some success. Globally, interest in lithium projects has waned as existing large producers and advanced exploration projects in Australia and South America increase production and move toward development.

2021 OUTLOOK

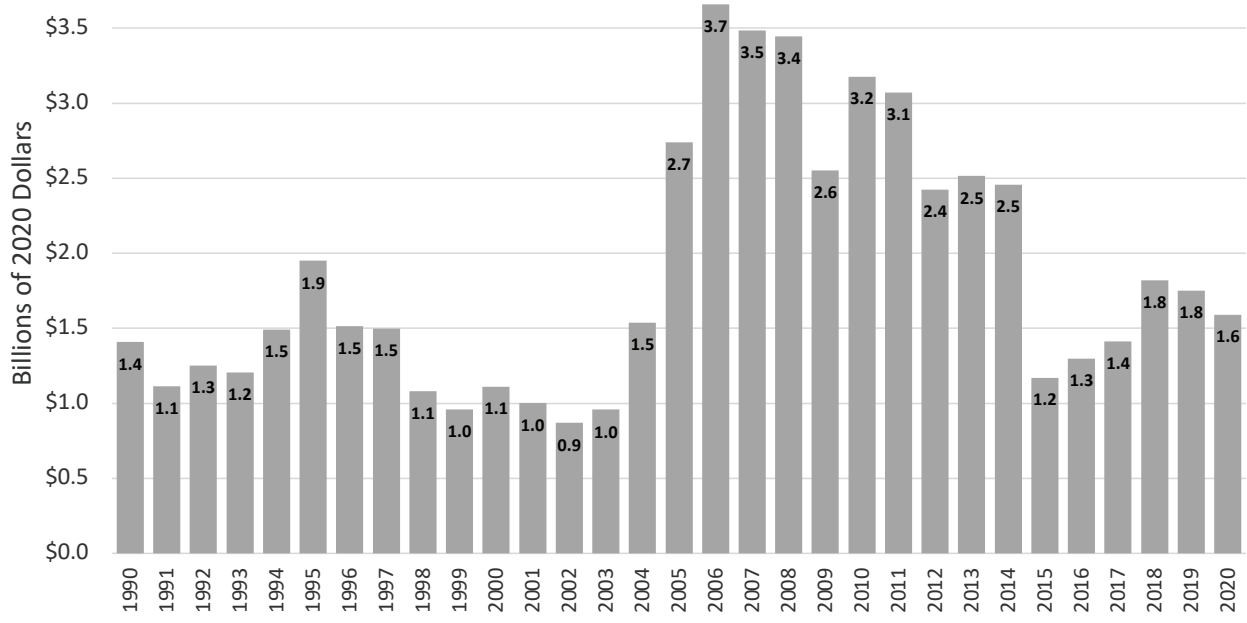
Access to higher grade ore at Bingham Canyon in 2021 due to the shift from east wall to south wall mining will drive increased metal production in 2021 and beyond. If approved for in-situ mining, Lisbon Valley will also resume active copper production. The strong price of gold and copper are likely to drive small-scale precious metal mining operations and stabilize or slightly increase metals exploration expenditure in 2021. Major swings in production and commodity prices are not expected for industrial minerals in 2021, but continued pandemic-related slowdowns or post-pandemic booms are possible. In summary, the UGS estimates that the gross production value of Utah's metallic and industrial mineral commodities in 2021 will be higher than 2020 totals driven by higher production at the Bingham Canyon mine and possible resumption of smaller-scale base and precious metal operations.

Figure 18.1: Total Value of Utah's Annual Metallic and Industrial Mineral Production



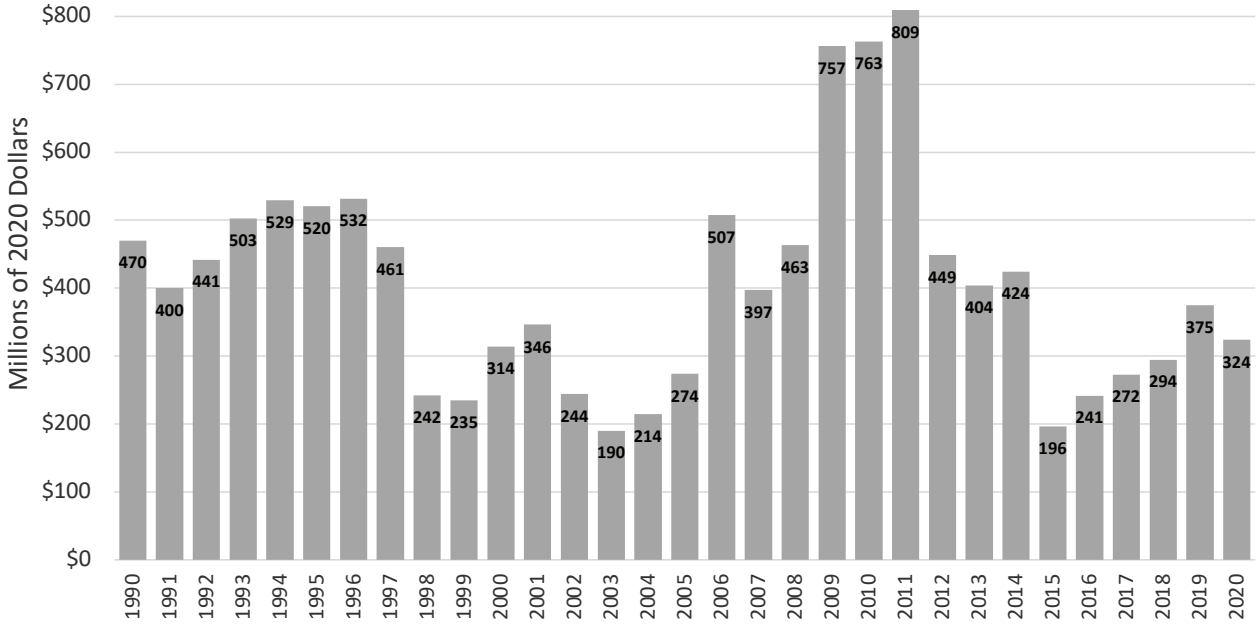
Note: The value presented for 2020 is an estimate.
Source: Utah Geological Survey.

Figure 18.2: Value of Utah's Annual Base Metal Production



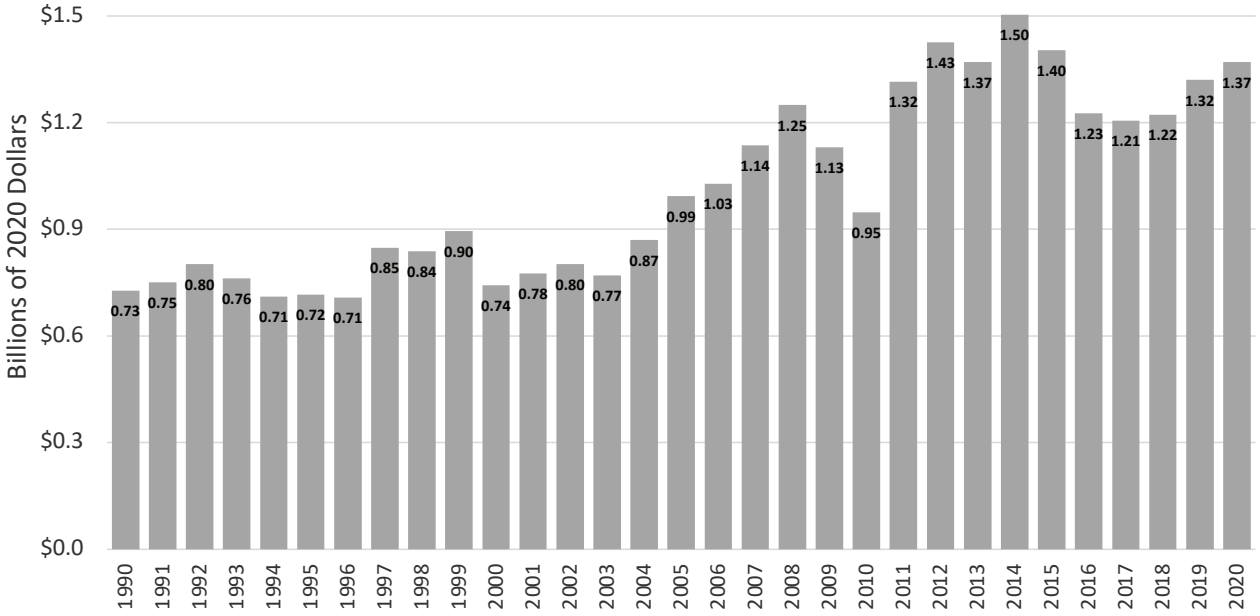
Note: The value presented for 2020 is an estimate; Copper production value for 2020 (part of total base metals value) is calculated from mined copper.
Source: Utah Geological Survey.

Figure 18.3: Value of Utah's Annual Precious Metal Production



Note: The value presented for 2020 is an estimate.
Source: Utah Geological Survey.

Figure 18.4: Value of Utah's Annual Industrial Mineral Production



Note: The value presented for 2020 is an estimate.
Source: Utah Geological Survey.

Tourism and Travel

19

Jennifer Leaver, Kem C. Gardner Policy Institute

2020 OVERVIEW

The COVID-19 pandemic upended Utah's travel and tourism economy in 2020. As the virus surfaced in the U.S. in February, travel restrictions, flight cancellations, stay-at-home orders, and service-oriented business closures directly impacted visitor spending, tourism-related jobs, and visitation trends.

Year-to-date travel-related sales tax revenues, such as transient room, restaurant, and motor vehicle leasing taxes, were trending 26.0-35.0% lower than 2019 revenues. During the first three quarters of 2020, 22 of Utah's 29 counties experienced year-over declines in county transient room tax revenue. Additionally, total taxable sales in the leisure and hospitality sector decreased 16.6% during the first three quarters of 2020. Year-over-year retail sales, however, including gas, groceries, and miscellaneous sales, were up 5.0-16.0%, reflecting a pandemic-influenced shift from public transportation, dining out, and service purchases, to auto travel, grocery shopping, and goods purchases.

During the first three quarters of 2020, there was a 13.6% decline in Utah's private leisure and hospitality sector jobs. For context, all other private sector jobs remained flat (-0.4%) during the same time period.

Despite the pandemic's arrival in March, Utah's 2019-2020 ski season was on course to experiencing another record year. The nearly $1.6 billion in skier and snowboarder spending was the second highest Utah resort visitor spending ever. During the 2019-2020 ski season, the Utah Office of Tourism (UOT) continued its "Mountain Time" marketing campaign for the third year. According to Strategic Marketing & Research Insights, the UOT's winter ad campaign generated 135,000 incremental (ad-influenced) skier and snowboarder visits and $377.0 million in spending.

With the pandemic's arrival, the UOT realized the need to pivot the three-season messaging while maintaining a market presence. In late April, the UOT launched their "Immediate" and "Renaissance" advertising, aiming to connect consumers' pandemic experiences to Utah's natural wonders.

During the pandemic, Utah state park visitation fared better than national park visitation due in part to spring national park closures, which diverted visitors to Utah's open state parks. State parks also benefited from outdoor recreation's growing popularity as a safe and socially-distanced activity. From January to August 2020, Utah state parks experienced a 25.6% year-over-year increase in visitation, while national parks visitation was down 43.4%.

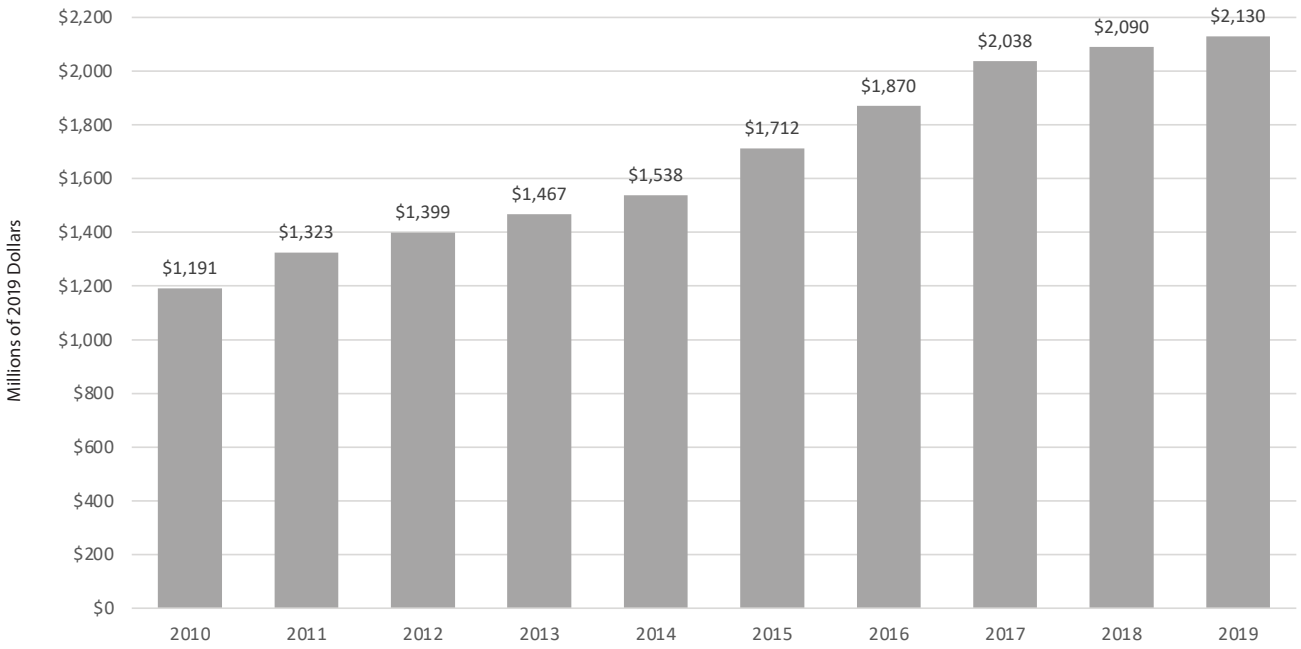
In 2020, Utah's Board of Tourism Development allocated more than $5.0 million in cooperative marketing matching funds statewide, half of which consisted of CARES Act funding. The Board also distributed $2.0 million in CARES Act money through a Meet in Utah grant to Utah's convention center districts. This grant acted as a stimulus package to incentivize group gatherings and counteract the pandemic's negative impact on business travel.

Despite the pandemic's impacts on Utah's leisure and hospitality sector, construction continued on Salt Lake's new convention hotel. In September, the Salt Lake City International Airport completed and publicly opened the first phase of its long-term redevelopment project, The New SLC.

2021 OUTLOOK

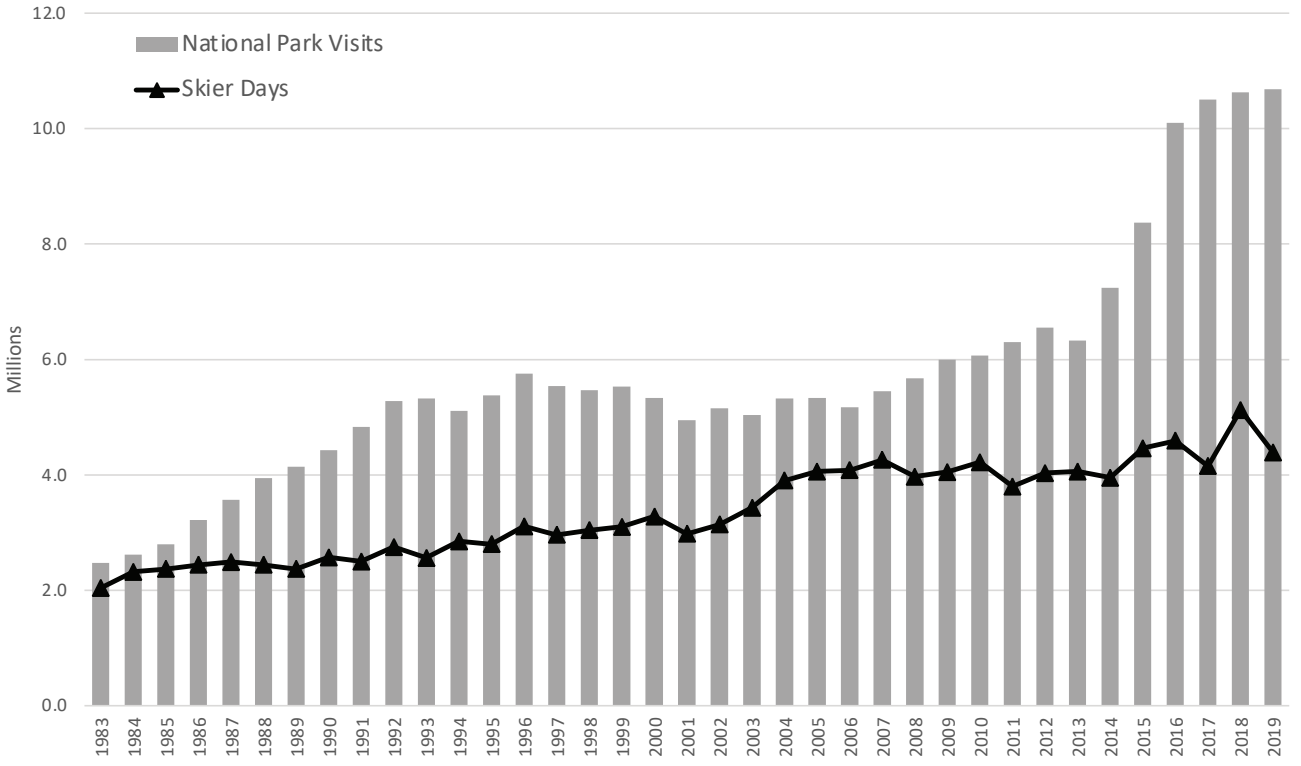
Domestic and international travel are anticipated to rebound in 2021.Travel experts predict a 20.0% year-over increase in U.S. domestic person-trips and a 73.0% increase in international arrivals, with leisure travel rebounding more quickly than business travel. Auto travel will remain the preferred transportation mode with a forecasted 19.0% year-over increase after a year of being down 26.0%. Air travel is predicted to rebound 16.0% after a year-over decline of more than 60.0%. Of course, increased 2021 travel in depends largely on the production and widespread distribution of accessible and effective COVID-19 vaccines.

Figure 19.1: Accommodations Taxable Sales, 2010–2019



Source: Kem C. Gardner Policy Institute analysis of Utah State Tax Commission data

Figure 19.2: Utah National Park and Skier Visits, 1983–2019



Note: Ski seasons include December of the year noted through late spring of the following year (i.e., 2019 represents the 2019-2020 ski season)
Source: U.S. National Park Service and Ski Utah

Table 19.1: Historical Utah Tourism Data

Year	Accommodations Taxable Sales (millions*)	National Park Visits	State Park Visits	Salt Lake Int'l. Airport Passengers	Skier Days	Travel- Related Employment	Visitor Spending (millions*)	International Visitor Spending (millions*)	Travel-Related Tax Revenue (millions*)
1983	$141	2,465,294	5,214,498	7,059,964	2,369,901	na	na	na	na
1984	$161	2,616,301	4,400,103	7,514,113	2,436,544	na	na	na	na
1985	$165	2,804,693	4,846,637	8,984,780	2,491,191	na	na	na	na
1986	$176	3,224,694	5,387,791	9,990,986	2,440,668	na	na	na	na
1987	$197	3,566,069	5,489,539	10,163,883	2,368,985	na	na	na	na
1988	$221	3,941,791	5,072,123	10,408,233	2,572,154	na	na	na	na
1989	$241	4,135,399	4,917,615	11,898,847	2,500,134	na	na	na	na
1990	$261	4,425,086	5,033,776	11,982,276	2,751,551	na	na	na	na
1991	$295	4,829,317	5,425,129	12,477,926	2,560,805	na	na	na	na
1992	$313	5,280,166	5,908,000	13,870,609	2,839,650	na	na	na	na
1993	$352	5,319,760	6,950,063	15,894,404	2,808,148	na	na	na	na
1994	$378	5,111,428	6,953,400	17,564,149	3,113,072	na	na	na	na
1995	$429	5,381,717	7,070,702	18,460,000	2,954,690	na	na	na	na
1996	$477	5,749,156	7,478,764	21,088,482	3,042,767	na	na	na	na
1997	$519	5,537,260	7,184,639	21,068,314	3,101,735	na	na	na	na
1998	$677	5,466,090	6,943,780	20,297,371	3,095,347	na	na	na	na
1999	$692	5,527,478	6,768,016	19,944,556	2,959,778	na	na	na	na
2000	$743	5,332,266	6,555,299	19,900,770	3,278,291	na	na	na	na
2001	$763	4,946,487	6,075,456	18,367,961	2,984,574	na	na	na	na
2002	$840	5,147,950	5,755,782	18,662,030	3,141,212	na	na	na	na
2003	$766	5,042,756	4,570,393	18,466,756	3,429,141	na	na	na	na
2004	$820	5,318,157	4,413,702	18,352,495	3,895,578	na	$5,648	na	$758
2005	$900	5,329,931	4,377,041	22,237,936	4,062,188	na	$5,779	na	$772
2006	$921	5,165,498	4,494,990	21,557,646	4,082,094	na	$5,908	na	$785
2007	$1,006	5,445,591	4,925,277	22,044,533	4,249,190	na	$6,769	$628	$905
2008	$1,049	5,670,851	4,564,770	20,790,400	3,972,984	na	$6,925	$697	$908
2009	$909	6,002,104	4,820,930	20,432,218	4,048,153	na	$5,689	$565	$771
2010	$1,015	6,072,900	4,842,891	21,016,686	4,223,064	na	$6,317	$667	$867
2011	$1,161	6,304,838	4,803,876	20,389,474	3,826,130	na	$6,955	$731	$942
2012	$1,248	6,555,833	5,093,740	20,096,549	4,031,621	109,300	$7,318	$774	$989
2013	$1,323	6,328,040	4,063,382	20,186,474	4,148,573	110,900	$7,507	$838	$1,058
2014	$1,406	7,239,149	3,740,896	21,141,610	3,946,762	115,200	$7,805	$789	$1,097
2015	$1,571	8,369,533	4,482,866	22,141,026	4,457,575	119,700	$8,259	$770	$1,150
2016	$1,732	10,087,077	5,175,615	23,155,527	4,584,658	125,900	$8,535	$805	$1,113
2017	$1,932	10,507,960	5,690,677	24,199,351	4,145,321	129,400	$9,148	$830	$1,202
2018	$2,038	10,600,000	6,711,932	25,554,244	5,125,441	136,600	$9,745	$823	$1,277
2019	$2,130	10,682,894	7,423,513	26,808,104	4,390,831	141,500	$10,064	$812	$1,340
Percent Change, 2018-2019									
	4.5%	0.8%	10.6%	4.9%	-14.3%	2.2%	3.3%	-1.4%	4.9%
Average Annual Rate of Change, 1983-2019									
	7.8%	4.2%	1.0%	3.8%	1.7%	3.8%	3.9%	2.2%	3.9%

*Dollar amounts reported in nominal dollars

Notes: Utah State Parks employed a new methodology in 2013 and began reporting fiscal year instead of calendar year.
Accommodations taxable sales from 1998 to 2016 were updated February 2018.
Spending estimates provided by D.K. Shifflet (2004-2008) and U.S. Travel Association (2009-present); visitor spending includes international spending.
Tax revenue estimates provided by GOMB (2004-2008) and Kem C. Gardner Policy Institute (2009-present); new methodology employed in 2016.
Sources: National Park Service; Utah State Tax Commission; Utah Department of Transportation; Department of Workforce Services; Department of Natural Resources; Salt Lake International Airport; Ski Utah; Department of Community & Economic Development; Governor's Office of Economic Development; Kem C. Gardner Policy Institute - University of Utah; Governor's Office of Management and Budget; Utah Office of Tourism; D.K Shiflet and Associates Ltd; U.S. Travel Association; and Tourism Economics.

Defense

20

Joshua Spolsdoff, Kem C. Gardner Policy Institute
Kevin Sullivan, Utah Defense Alliance

2020 OVERVIEW

Employment

In 2019, there were 34,693 total federal defense employees in Utah: 16,661 military personnel and 18,032 civilian employees. This was a 3.6% increase from 2018. Over the past five years, Utah has seen a net gain of 1,906 federal civilian jobs (11.8% increase) and 587 military personnel (3.7% increase). The installations that employ most of Utah's federal defense employees are Hill Air Force Base, Dugway Proving Ground, Tooele Army Depot, Utah National Guard, the Reserves, and Veteran Affairs (benefits office, hospital, clinics, and centers). Federal defense employment does not include defense-related private sector employment, such as jobs at defense contractors.

Federal defense employment in Utah shrank from 42,474 in 1990 to a low of 29,276 in 1999. In 2019, defense employment reached 34,693, its highest-level post-1993. However, defense's share of total employment was 2.1% in 2019, significantly lower than its share of 5.5% in 1990. Even with recent employment gains since 2014, defense's share of total employment has fallen due to the rest of Utah's economy growing faster.

In 2019, 84.4% of federal defense employment in Utah was located in three counties: 18,203 jobs in Davis County (52.5%), 8,595 jobs in Salt Lake County (24.8%), and 2,475 jobs in Tooele County (7.1%). Davis County's large share of defense employment is attributed to Hill Air Force Base, the largest military installation in Utah. Hill AFB was the state's sixth-largest employer in 2019. The largest installations in Salt Lake and Tooele counties were the reserve branches of the armed forces and Dugway Proving Ground, respectively.

Compensation

Compensation per federal defense job in Utah has historically been considerably higher than Utah's average compensation rate, with the gap widening by over 50% in 2009. Even with some tapering in recent years, federal defense jobs in Utah offered an average of $85,377 in compensation, 35.7% more than the $62,929 at non-defense jobs in 2019.

In 2019, federal civilian jobs accounted for more than two-thirds (70.3%) of total federal defense compensation. For the same year, 81.6% of federal civilian defense compensation came from national security jobs, down from 84.4% in 2014. In the last five years, civilian compensation from federal medical centers for veterans and service members in Utah increased by 2.7%.

Veterans

The National Center for Veterans Analysis and Statistics estimated 130,817 veterans lived in Utah in 2019, 17,762 of whom were military retirees. The largest numbers of veterans were in Salt Lake, Davis, Utah, and Weber counties. Retirees are concentrated in Davis, Salt Lake, and Weber counties, with relatively strong presences in Utah and Washington counties. By 2045, the veteran population is expected to decline to 100,000 individuals.

Contracts and Grants

At $2.0 billion in FY 2019, the total value of Department of Defense (DOD) and Veteran Affairs (VA) contracts and grants in Utah has increased steadily over the past few years, but it still well below peak spending of $4.0 billion in 2007. Annual amounts vary considerably, driven primarily by changes in DOD contracting levels. Even with fluctuations from year to year, DOD contracting consistently makes up a majority share of total awards, ranging between 87% to 97% depending on the year. Total grant awards typically are between 1% and 11% of total awards. In 2019, DOD contracts and grants accounted for 95% of total Utah awards; the split was 95% to the DOD and 5% to the VA.

2021 OUTLOOK

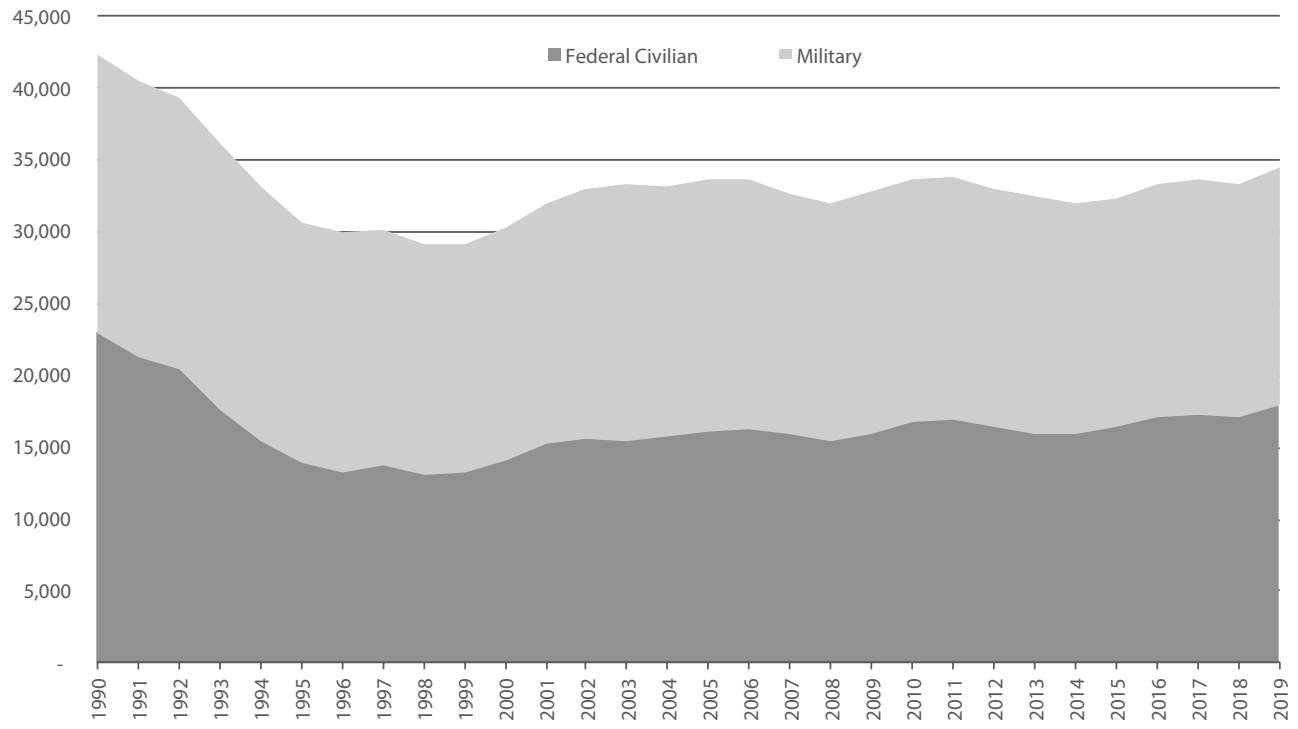
Recent history has shown small gains in total defense employment in Utah; we anticipate this to continue to increase due to expected growth pockets over the next several years in some areas. Hill Air Force Base continues to forecast growth of up to 2,000 mostly federal civilian jobs, many of them in high paying software development occupations.

Northrop Grumman was awarded $13.3 billion in September 2020 for the Ground Based Strategic Deterrent (GBSD) Engineering and Manufacturing Design (EMD) contract. Northrop has elected to locate its operations in the Falcon Hill National Aerospace Research Park adjacent to Hill. With one 210,000 square foot office building completed and occupied, two similar buildings under construction, and a fourth on the drawing board, the GBSD prime contractor is projecting the addition of 3,000 new jobs in the next 5 years.

The GBSD EMD project is the first contract in what is projected to be an $80 billion program. There will be additional growth of several hundred jobs in the Hill Air Force Base Program Office which manages that contract.

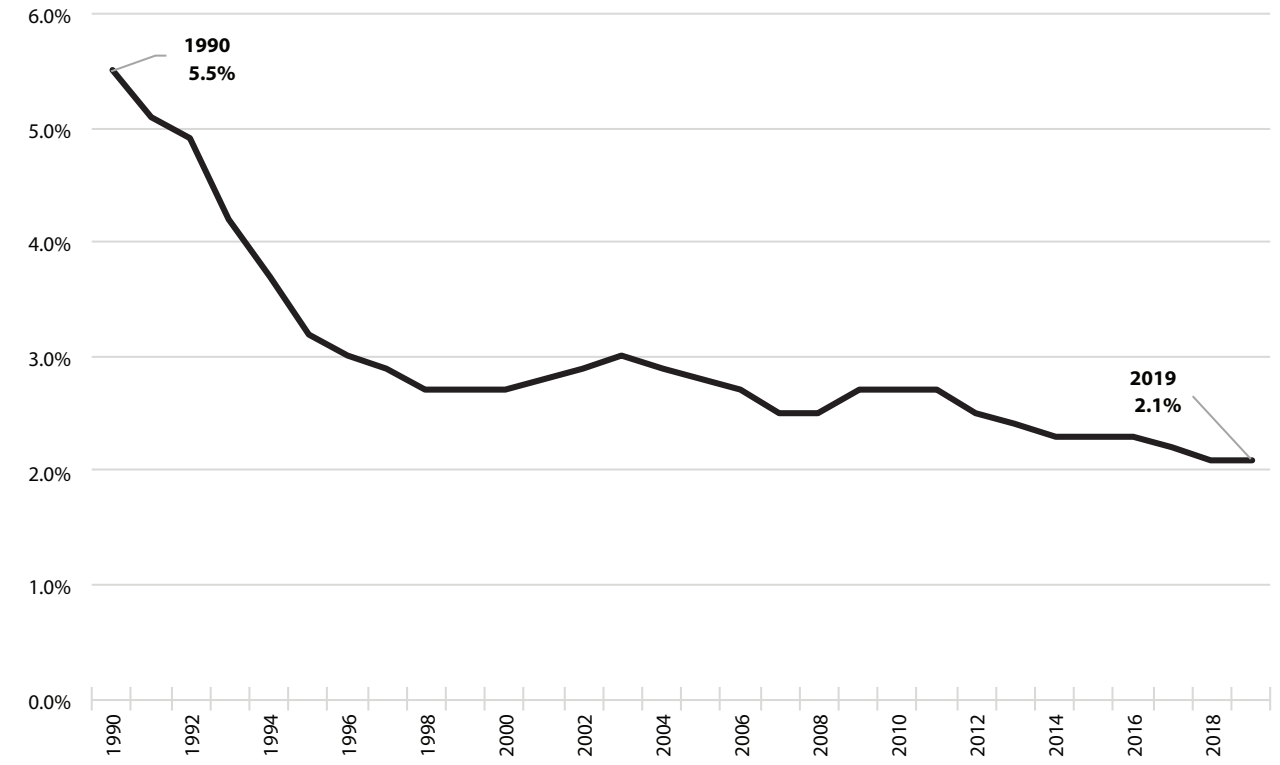
The growth internal to Hill Air Force Base, combined with defense contractors relocating to Utah to support the GBSD EMD program will significantly increase the defense industry impact to the northern Utah economy for many years to come.

Figure 20.1: Military and Federal Civilian Defense Employment in Utah, 1990–2019



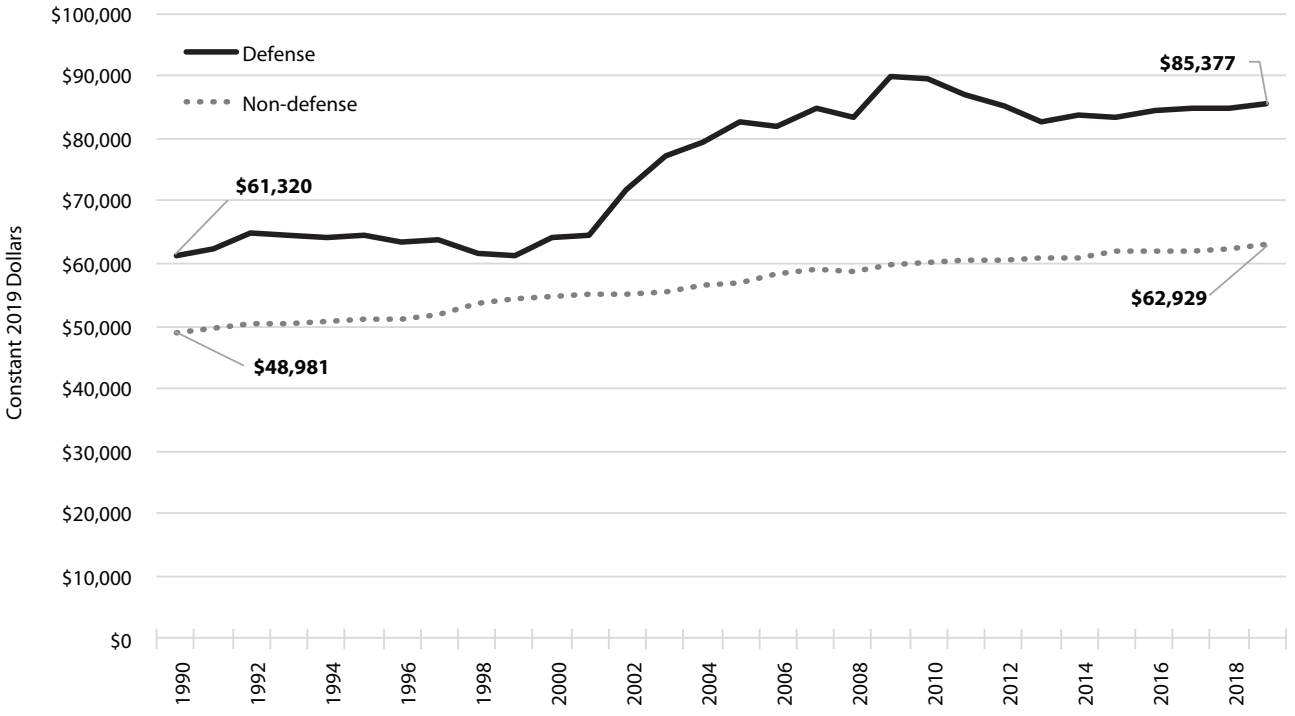
Note: Federal defense employment includes the military, whether active-duty employment or part-time employment in reserve or National Guard units. It also includes federal civilian employment for national security and medical care provided by the VA and DOD.
Source: Bureau of Economic Analysis, Bureau of Labor Statistics.

Figure 20.2: Defense Share of Total Employment in Utah, 1990–2019



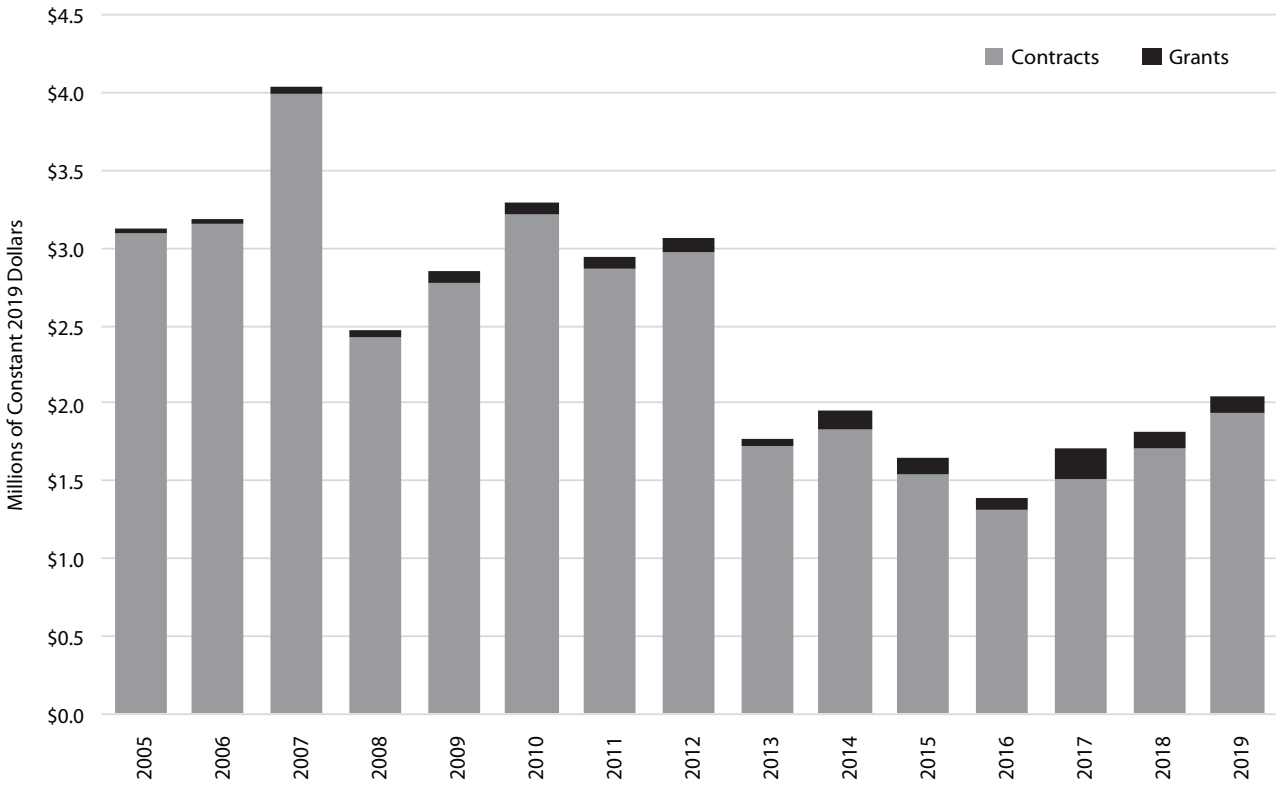
Source: Bureau of Economic Analysis, Bureau of Labor Statistics.

Figure 20.3: Compensation per Utah Job, Defense versus Non-Defense, 1990–2019



Notes: Compensation includes wages and salaries and employer-paid pension and government social insurance contributions. The defense industry encompasses military and federal civilian personnel.
Source: Bureau of Economic Analysis, Bureau of Labor Statistics.

Figure 20.4: Total DoD and VA Prime Contracts and Grants Performed in Utah, 2005–2019



Note: Amounts include dollars obligated each federal fiscal year for prime awards for contracts and grants funded by the U.S. Department of Defense (DoD) and U.S. Department of Veterans Affairs (VA) for which Utah was given as the primary place of performance. All amounts are in constant 2019 dollars.
Source: USAspending.gov by the U.S. Department of Treasury.

Table 20.1: Defense Employment and Compensation in Utah, Selected Years 1990–2019

Year	Employment				Compensation (Millions of Dollars)			
	Military	Federal Civilian	Total Defense	Share of All Utah Jobs	Military	Federal Civilian	Total Defense	Share of Utah Compensation
1990	19,399	23,075	42,474	5.5%	$771.3	$1,833.2	$2,604.5	6.8%
1991	19,336	21,387	40,723	5.1%	$786.4	$1,750.9	$2,537.3	6.4%
1992	18,938	20,619	39,557	4.9%	$787.1	$1,781.4	$2,568.5	6.2%
1993	18,406	17,850	36,256	4.2%	$729.9	$1,611.4	$2,341.3	5.4%
1994	17,748	15,570	33,318	3.7%	$701.5	$1,436.8	$2,138.3	4.6%
1995	16,695	14,134	30,829	3.2%	$673.9	$1,310.6	$1,984.5	4.0%
1996	16,676	13,472	30,148	3.0%	$687.8	$1,228.3	$1,916.1	3.7%
1997	16,261	13,975	30,236	2.9%	$666.6	$1,266.4	$1,933.0	3.6%
1998	16,033	13,277	29,310	2.7%	$542.3	$1,268.0	$1,810.3	3.1%
1999	15,922	13,354	29,276	2.7%	$550.8	$1,242.3	$1,793.2	3.0%
2000	16,222	14,291	30,513	2.7%	$570.2	$1,389.2	$1,959.4	3.2%
2001	16,761	15,375	32,136	2.8%	$610.3	$1,463.5	$2,073.7	3.3%
2002	17,334	15,825	33,159	2.9%	$777.2	$1,602.8	$2,380.1	3.8%
2003	17,918	15,618	33,536	3.0%	$963.5	$1,629.6	$2,593.1	4.1%
2004	17,500	15,874	33,374	2.9%	$978.8	$1,674.5	$2,653.2	4.0%
2005	17,608	16,232	33,840	2.8%	$1,058.3	$1,734.3	$2,792.6	4.0%
2006	17,326	16,464	33,790	2.7%	$989.4	$1,778.9	$2,768.3	3.7%
2007	16,768	16,072	32,840	2.5%	$958.3	$1,825.3	$2,783.6	3.6%
2008	16,540	15,638	32,178	2.5%	$966.3	$1,713.6	$2,679.8	3.5%
2009	16,959	16,069	33,028	2.7%	$1,062.3	$1,912.8	$2,975.1	3.9%
2010	16,886	16,881	33,767	2.7%	$1,052.2	$1,976.6	$3,028.8	4.0%
2011	16,896	17,115	34,011	2.7%	$972.8	$1,991.2	$2,964.0	3.8%
2012	16,570	16,561	33,131	2.5%	$914.2	$1,905.1	$2,819.3	3.5%
2013	16,432	16,171	32,603	2.4%	$875.8	$1,813.8	$2,689.5	3.3%
2014	16,074	16,126	32,200	2.3%	$821.8	$1,876.3	$2,698.1	3.2%
2015	15,962	16,603	32,565	2.3%	$787.0	$1,931.5	$2,718.4	3.0%
2016	16,232	17,297	33,529	2.3%	$817.9	$2,018.2	$2,836.1	3.1%
2017	16,361	17,434	33,795	2.2%	$808.4	$2,057.4	$2,865.8	3.0%
2018	16,133	17,346	33,479	2.1%	$829.3	$2,015.1	$2,844.4	2.9%
2019	16,661	18,032	34,693	2.1%	$880.5	$2,081.4	$2,962.0	2.9%

Note: Federal defense employment includes the military, whether active-duty employment or part-time employment in reserve or National Guard units. It also includes federal civilian employment for national security and medical care provided by the VA and DOD. Total Utah employment consists of total full- and part-time employment. All dollars are in millions of constant 2019 dollars.
Source: Bureau of Economic Analysis, Bureau of Labor Statistics.

Table 20.2: Total DoD and VA Prime Contracts and Grants Performed in Utah, 2005–2019 (Millions)

Fiscal Year	Contracts			Grants			Contracts & Grants			DoD contracts share
	DoD	VA	Total	DoD	VA	Total	DoD	VA	Total	
2005	$3,003.8	$82.8	$3,086.6	$39.1	$2.3	$41.3	$3,042.9	$85.0	$3,127.9	96%
2006	$3,081.5	$67.0	$3,148.5	$28.2	$2.3	$30.5	$3,109.7	$69.3	$3,179.0	97%
2007	$3,925.3	$67.3	$3,992.6	$35.7	$0.0	$35.7	$3,961.0	$67.3	$4,028.3	97%
2008	$2,347.6	$70.9	$2,418.5	$52.8	$0.1	$52.9	$2,400.4	$71.0	$2,471.4	95%
2009	$2,661.4	$110.9	$2,772.3	$76.1	$0.0	$76.1	$2,737.6	$110.9	$2,848.4	93%
2010	$3,092.3	$128.9	$3,221.2	$53.2	$16.4	$69.6	$3,145.5	$145.3	$3,290.8	94%
2011	$2,740.4	$119.5	$2,859.9	$72.1	$11.5	$83.7	$2,812.5	$131.1	$2,943.6	93%
2012	$2,869.4	$104.6	$2,973.9	$56.2	$27.8	$83.9	$2,925.5	$132.3	$3,057.9	94%
2013	$1,629.6	$95.2	$1,724.8	$48.7	$1.4	$50.1	$1,678.3	$96.6	$1,774.9	92%
2014	$1,735.2	$99.9	$1,835.1	$99.0	$21.0	$119.9	$1,834.2	$120.8	$1,955.0	89%
2015	$1,447.7	$92.8	$1,540.6	$86.3	$29.5	$115.9	$1,534.1	$122.4	$1,656.5	87%
2016	$1,207.0	$109.0	$1,316.0	$74.5	$2.1	$76.6	$1,281.5	$111.0	$1,392.5	87%
2017	$1,451.1	$67.8	$1,518.9	$165.7	$30.6	$196.2	$1,616.7	$98.4	$1,715.1	85%
2018	$1,642.4	$68.3	$1,710.7	$75.3	$27.2	$102.5	$1,717.7	$95.5	$1,813.2	91%
2019	$1,876.9	$68.1	$1,945.0	$60.8	$35.0	$95.9	$1,937.7	$103.1	$2,040.8	92%

Note: Amounts include dollars obligated each federal fiscal year for prime awards for contracts and grants funded by the U.S. Department of Defense (DoD) and U.S. Department of Veterans Affairs (VA) for which Utah was given as the primary place of performance. All dollars are in millions of constant 2019 dollars.
Source: USAspending.gov by the U.S. Department of Treasury.

Health Care

21

Laura Summers, Kem C. Gardner Policy Institute

2020 OVERVIEW

In 2020, Utah ranked as the sixth healthiest state in America's Health Rankings' health outcomes category.[1] Health outcomes include behavioral health, mortality, and physical health measures. America's Health Rankings changed its methodology in 2020, and the new edition does not have an overall state score that is comparable to previous years. However, Utah ranks in the top 10 states in three of the five categories on which states' health is measured under the new methodology. These categories include healthy behaviors (Utah ranks 2nd), social and economic factors (2nd), health outcomes (6th), physical environment (12th), and clinical care (25th).

Health Outcomes

Measures that influence Utah's favorable rankings include high levels of physical activity among Utah adults, a low ratio of income inequality, a high percentage of households with high-speed internet, high rates of volunteerism, and low smoking rates.

Measures that negatively influence Utah's rankings include a low number of primary care physicians per 100,000 population, a high percentage of adults with non-medical drug use, and a high suicide rate. In terms of increasing health needs, the report highlights a 38% increase in Utah adults reporting frequent mental distress between 2014–2019, a 16% increase in adult obesity between 2017–2019, and a 7% decline in adults who reported that their health was very good or excellent between 2013–2019.

To address some of these issues, the Utah Department of Health identified three priority improvement areas for 2017–2020: reducing obesity and obesity-related chronic conditions; reducing prescription drug misuse, abuse, and overdose; and improving mental health and reducing suicide.[2]

Obesity

Utah has a relatively low share of adults who are obese compared with other states (Utah ranks 13th in America's Health Rankings). However, the percentage has been steadily increasing since the 1990s.

The percent of Utah's youth who are overweight or obese mirrors this trend, with the total share of Utah high school students who are overweight or obese increasing from 14.2% in 1999 to 22.1% in 2019. Boys are more likely than girls to be overweight or obese (24.7% vs. 19.4%). In terms of race and ethnicity, 33.6% of high school students identifying as non-White/non-Hispanic are overweight or obese, compared with 26.7% of Hispanic students (all races) and 19.9% of White/non-Hispanic students.

Drug Misuse, Abuse, and Overdose

Utah has long experienced high rates of drug-related deaths; however, its opioid death rate has decreased in recent years. In 2018, Utah's age-adjusted opioid overdose death rate was 14.8 per 100,000 population, down from 15.5 in 2017 and a high of 16.8 in 2014.[3] In 2018, Utah had the 27th highest opioid death rate in the country, which fell slightly above the national average of 14.6 (2019 data had not been provided at the time this report was published).

Suicide and Mental Health

Utah has one of the country's highest suicide rates (Utah ranked fifth highest in 2018; 2019 data was not available).[4] In terms of race and ethnicity, suicide rates are highest among Utah's American Indian/Native Alaskan and White populations (22.4

1. America's Health Rankings Annual Report, 2020 Edition. ©2020 United Health Foundation. All Rights Reserved.
2. Utah Health Status Update: The Utah Health Improvement Plan Implementation Process. (2019, May). UDOH.
3. Kaiser Family Foundation analysis of Centers for Disease Control and Prevention (CDC), National Center for Health Statistics. Multiple Cause of Death 1999-2018 on CDC WONDER Online Database, released 2020.
4. Health Indicator Report of Suicide. (2019, Nov). UDOH.

and 21.7 per 100,000 population, respectively).[5] These rates compare to 9.1 for Asians, 11.9 for Blacks, and 13.7 for Pacific Islanders.

Data show that 16.4% of high school students seriously considered attempting suicide in 2019 compared with 16.0% in 2017 and 14.4% in 2015 (data is collected every other year).[6]

Current Health Care Concerns

COVID-19 was the leading public health issue in Utah and the world in 2020. As of December 1, 2020, the state had 198,216 total COVID-19 cases, 1,432,225 total people tested, 8,279 hospitalizations, and 890 deaths from COVID-19. The highest number of daily positive tests to date was on November 19, 2020 (4,607). The state surpassed its intensive care unit utilization threshold on November 10, 2020. Potential sources of reported exposure are highest among households and from social gatherings.

As of December 1, 2020, individuals age 25–44 make up the largest share of COVID-19 cases (36%), followed by 15–24-year-olds (25%) and 45–64-year-olds (22%). Individuals age 85 and older are most likely to be hospitalized, with a case-hospitalization rate of 26.6% (followed by 65–84-year-olds, 18.6%, and 45–64-year-olds, 6.0%). Utahns with pre-existing conditions are more likely to be hospitalized with severe complications from COVID-19. The top two most common conditions include hypertension and diabetes (primarily type 2 diabetes).

In terms of race and ethnicity, Utah's minority populations are disproportionately impacted by COVID-19. For example, Utah's Hispanic population makes up only 14.2% of Utah's population, but 24.8% of all COVID-19 cases (as of December 1, 2020). Some of Utah's minority populations are also hospitalized from COVID-19 at disproportionately high rates. Figure 21.5 shows Utah's COVID-19 hospitalization rates by race and ethnicity. Utah's American Indian/Alaska Native population has the highest mortality rate (76.2 per million people), followed by Native Hawaiian/Pacific Islanders (71.4), and Hispanic or Latino populations (36.9). The statewide average is 28.7.

Utah experienced a surge in COVID-19 cases in fall 2020, and as of December 1, 2020, Utah had the sixth-highest rate of COVID-19 cases per million people in the country (61,044).[7] That said, Utah's fatality rate is low compared with other states. Part of this may be due to its young and relatively healthy population.

Health Insurance

The majority of Utahns receive health insurance through their employers. Utah continues to have the highest rate of employer-sponsored insurance (ESI) in the nation, with more than 60.5% of Utahns having ESI compared with the national average of 49.6% (2019).[8]

The purchase of health savings account (HSA)-qualified high-deductible health plans (HDHPs) has also significantly increased in Utah since the mid-2000s. In 2019, HSA-qualified HDHPs accounted for 37.5% of Utah's commercial health insurance market, compared with 34.1% in 2018 and only 3.0% in 2007. HSAs make up 43.9% of Utah's large group market (defined as employers with 51 or more employees), 41.7% of the state's small group market, and 23.7% of health plans purchased in the individual market.[9] These percentages represent an increase in market share in every group size compared with 2018.

Racial and Ethnic Differences in Health

In 2019, Utah's uninsured rate was 9.7%. While this rate is relatively low compared with other states that have not expanded Medicaid (Utah did not fully expand Medicaid until January 2020), the low rate is not consistent for all population groups. For example, data show Utah's Hispanic/Latino adult population has uninsured rates as high as 35.9%.[10]

5. 2016–2018 average. Age-adjusted to U.S. 2000 standard population using 3 age adjustment age groups. Utah Death Certificate Database, Office of Vital Records and Statistics, Utah Department of Health.
6. 2019 Student Health and Risk Prevention, Prevention Needs Assessment Survey. State of Utah Department of Human Services. Division of Substance Abuse and Mental Health.
7. Kaiser Family Foundation estimates based on Johns Hopkins University's COVID-19 Dashboard by the Center for Systems Science and Engineering (CSSE) and 2019 Population data from U.S. Census Bureau.
8. Kaiser Family Foundation estimates based on the Census Bureau's American Community Survey 2019 1-Year Estimates.
9. Hawley, J. (2020, December). 2020 Health Insurance Market Report, State of Utah Insurance Department.
10. 2017–2019 average. Age-adjusted for population age 18 and older. Behavioral Risk Factor Surveillance System (BRFSS), Utah Department of Health.

Other groups with uninsured rates above the state average include Native Hawaiian or other Pacific Islanders (23.5%), Black or African American (20.0%), and American Indian or Alaska Natives (16.3%). Figure 21.9 shows similar trends among Utah's uninsured children.

Rates of infant mortality are also higher among Utah's minority populations. For example, the infant mortality rate for Blacks is nearly double the rate for Whites (8.9 vs. 4.8 infant deaths under one year of age per 1,000 live births).[11] Asians and Pacific Islanders also have relatively high infant mortality rates (8.2 and 7.6).

These differences in health outcomes exist over a population's lifetime as well. Using life expectancy as a measure of a population's overall health and well-being illustrates the disparities that exist among Utah's minority populations. Data show more than a 10-year difference in life expectancy between Utah's minority populations with the longest life expectancy (Asians) and the shortest life expectancy (Pacific Islanders).[12]

Mental health is one area where some minority groups have relatively low rates; 16.4% of Utah's Hispanic population experienced depression compared with 24.1% of Utah's non-Hispanic population in 2019.[13] That said, there is growing concern about the short- and long-term impacts of COVID-19 on mental health. Some data suggest that the share of U.S. adults experiencing anxiety disorder symptoms has quadrupled during the pandemic, increasing from roughly 8% in 2019 to over 30% in 2020.[14] Utah mirrors this national trend. As of November 23, 2020, 38.0% of Utahns reported having anxiety disorder symptoms.

2021 OUTLOOK

COVID-19 dominated Utah's health care focus and public health efforts in 2020. Attention to this issue will continue into 2021 as the state prepares for and refines its vaccine distribution plans. These plans will likely change, however, as more vaccines become available, more people are vaccinated, outcomes from vaccinations become known, and the timelines for large-scale distribution become clearer.[15]

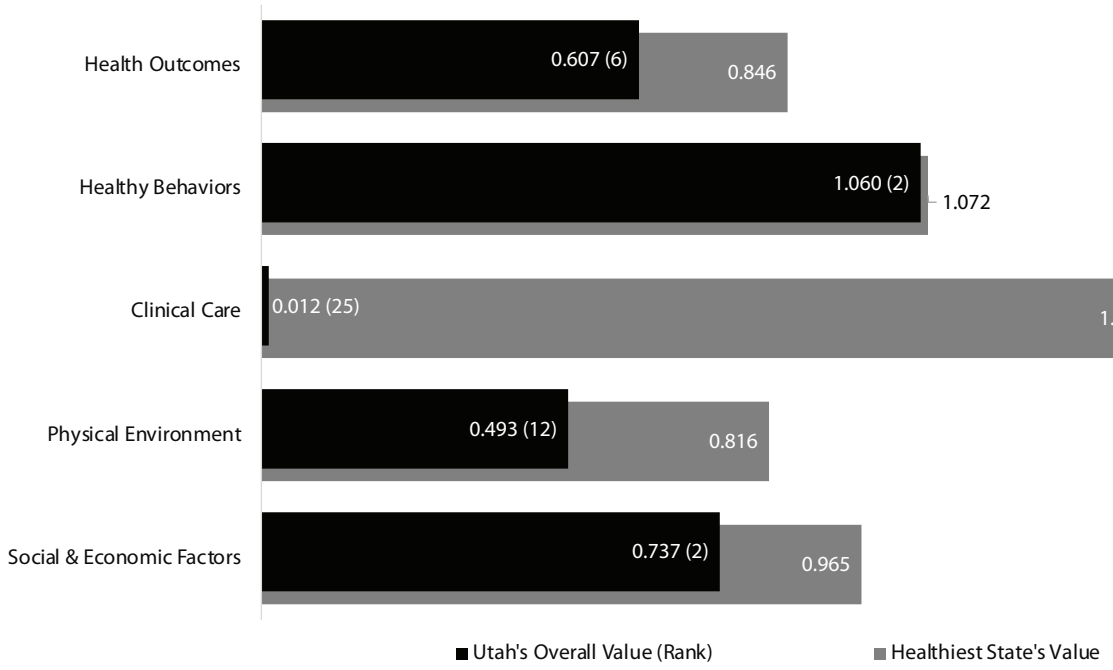
2021 will also be a time to proactively address many of the direct and indirect health issues that emerged from the pandemic. This includes a focus on preventive and primary care that many people delayed in 2020 (e.g., dental care, immunizations, cancer screenings, etc.). This pent-up need for care may have resulted in some missed early diagnoses, leading to health conditions that are harder to treat or manage, or lead to premature death. The long-term effects of COVID-19 are also still mostly unknown, but there is concern that many individuals could experience lasting complications.

The state must also attend to increased mental and behavioral health needs among Utah's adults and children. Additional resources may be necessary to address the increase in anxiety and other behavioral health needs that emerged or were exacerbated during COVID-19. Addressing ongoing COVID-19 health issues as well as a pent-up demand for care could place increased burdens on Utah's already strained physical, mental, and behavioral health systems.

2021 will also be a time for Utah to address the racial/ ethnic, income, and regional disparities in health and health care that existed before the pandemic but were elevated due to COVID-19. Addressing health care access and affordability will be vital to ensuring people can receive necessary care for ongoing COVID-19 and other health issues. This could include transitioning to value-based care and other solutions that lower health care costs while increasing access and maintaining quality of care.

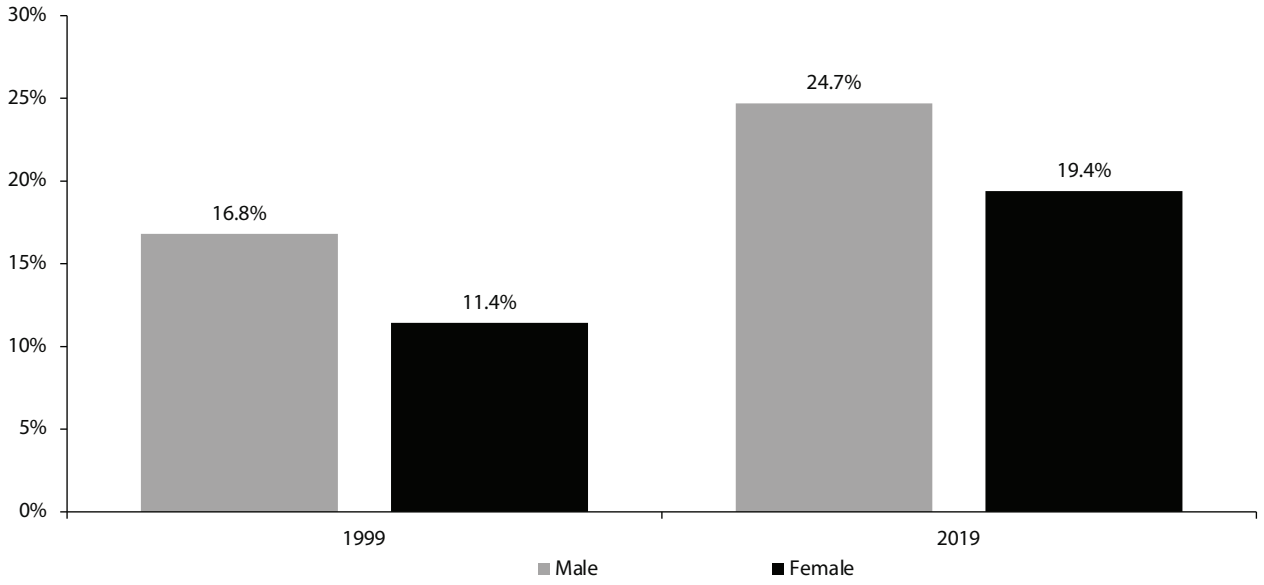
11. 2016–2018 average. Utah Death Certificate Database & Utah Birth Certificate Database, Office of Vital Records and Statistics, Utah Department of Health.
12. 2014–2018 average. Center for Health Data and Informatics, Utah Department of Health.
13. Utah Behavioral Risk Factor Surveillance System, Office of Public Health Assessment, Utah Department of Health.
14. U.S. Census Bureau, Household Pulse Survey, 2020; National Center for Health Statistics, National Health Interview Survey, 2019.
15. For more information see COVID-19 Vaccine Information at https://coronavirus.utah.gov/vaccine/

Figure 21.1: Utah's Scores on America's Health Rankings Categories, 2020



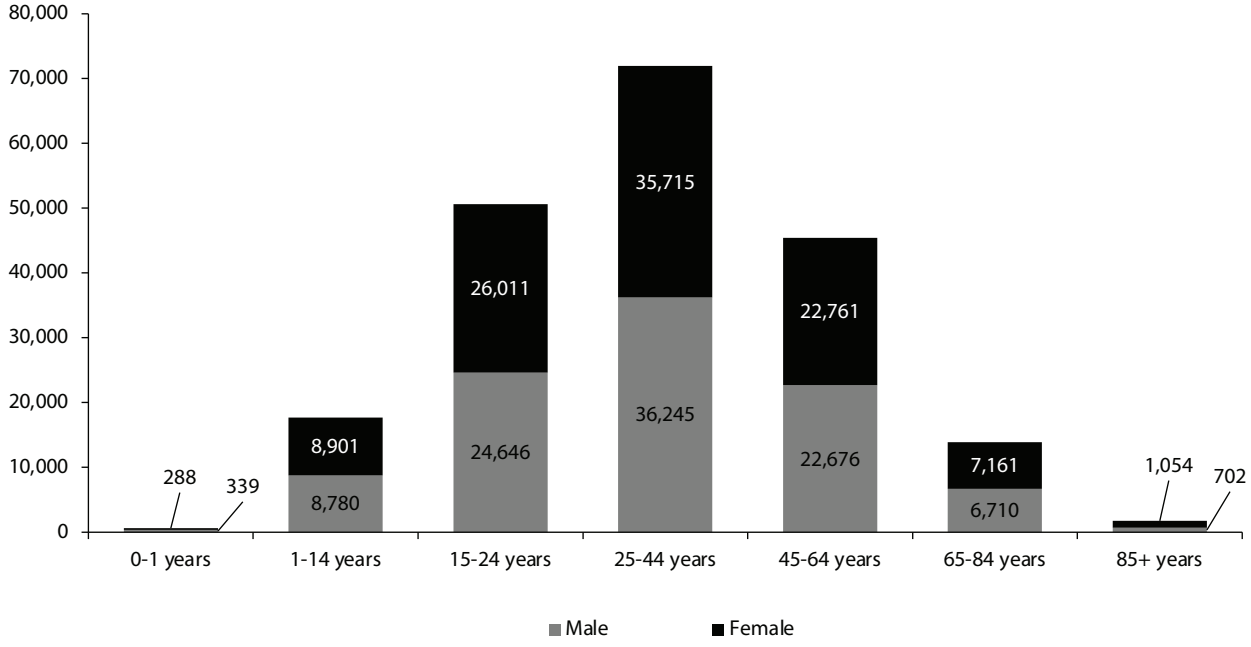
Note: A state's overall score is calculated by adding the products of the score for each ranked measure multiplied by its assigned weight.
Source: America's Health Rankings Annual Report, 2020 Edition. ©2020 United Health Foundation. All Rights Reserved.

Figure 21.2: Share of Utah Students Grades 9–12 Who Are Overweight or Obese, 1999 vs. 2019



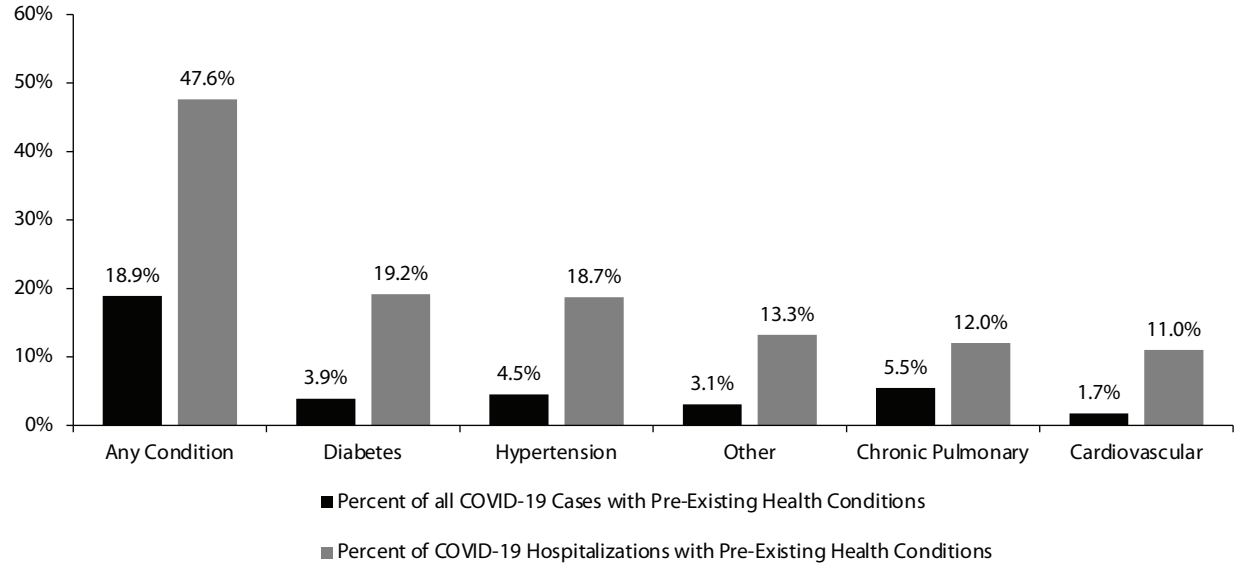
Note: Overweight or Obese is defined as at or above the 85th percentile for Body Mass Index. Data are self-reported. Comparisons of annual rates must be interpreted cautiously as methods used to collect data may vary from year to year.
Source: Utah Youth Risk Behavior Surveillance System, Utah State Office of Education.

Figure 21.3: Utah COVID-19 Cases by Age and Gender, December 1, 2020



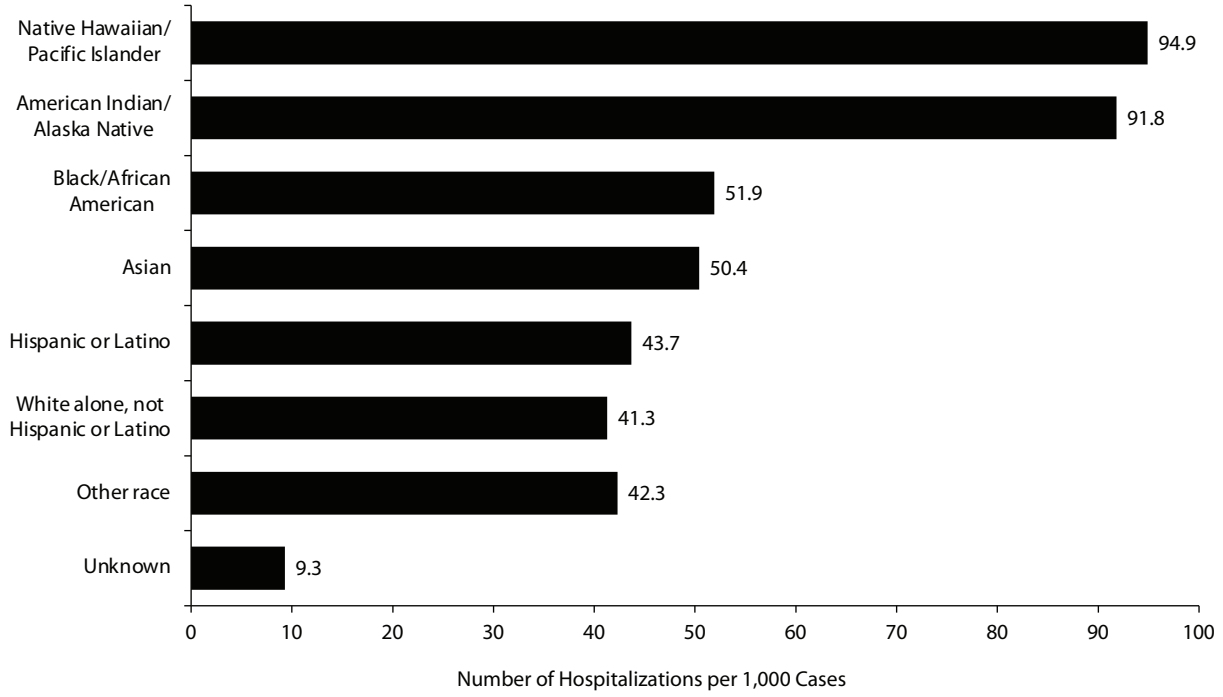
Source: Utah Department of Health COVID-19 Surveillance.

Figure 21.4: Share of Hospitalized COVID-19 Cases in Utah with Pre-Existing Health Conditions Compared with Percent of all Utah Cases, December 1, 2020



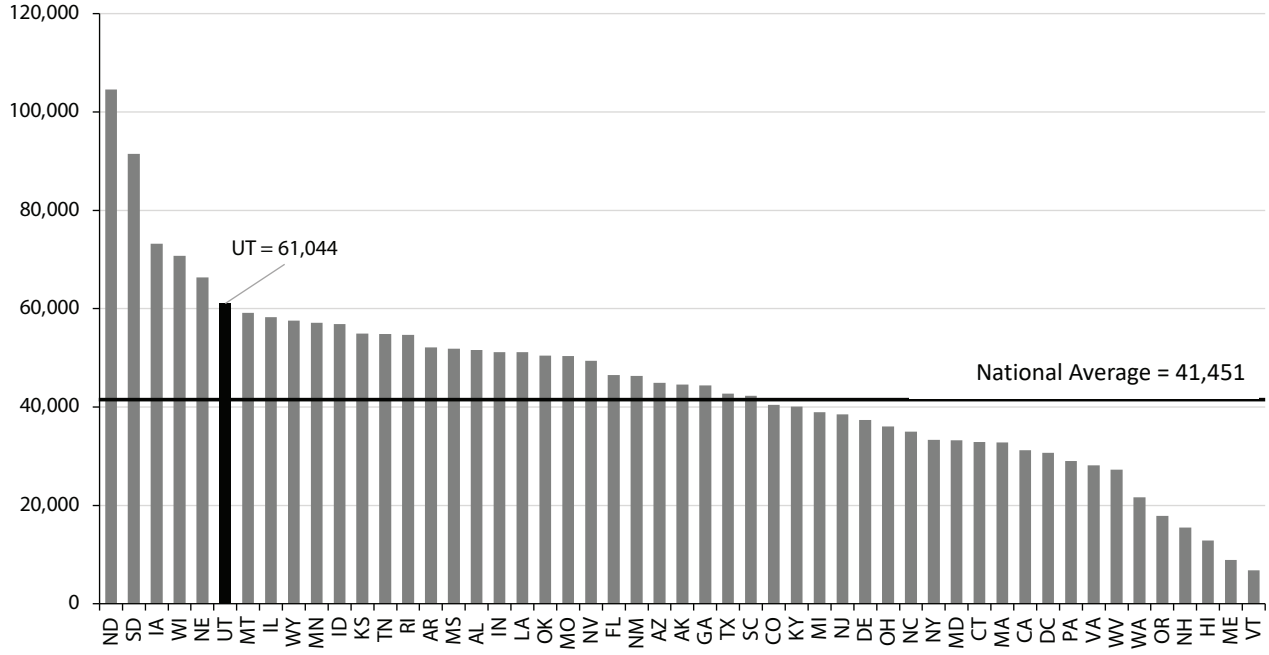
Note: Graph shows the top five most common pre-existing health conditions among individuals hospitalized for COVID-19 (besides "Any Condition").
Source: Utah Department of Health COVID-19 Surveillance.

Figure 21.5: Utah COVID-19 Hospitalization Rate Per 1,000 Cases by Race and Ethnicity, December 1, 2020



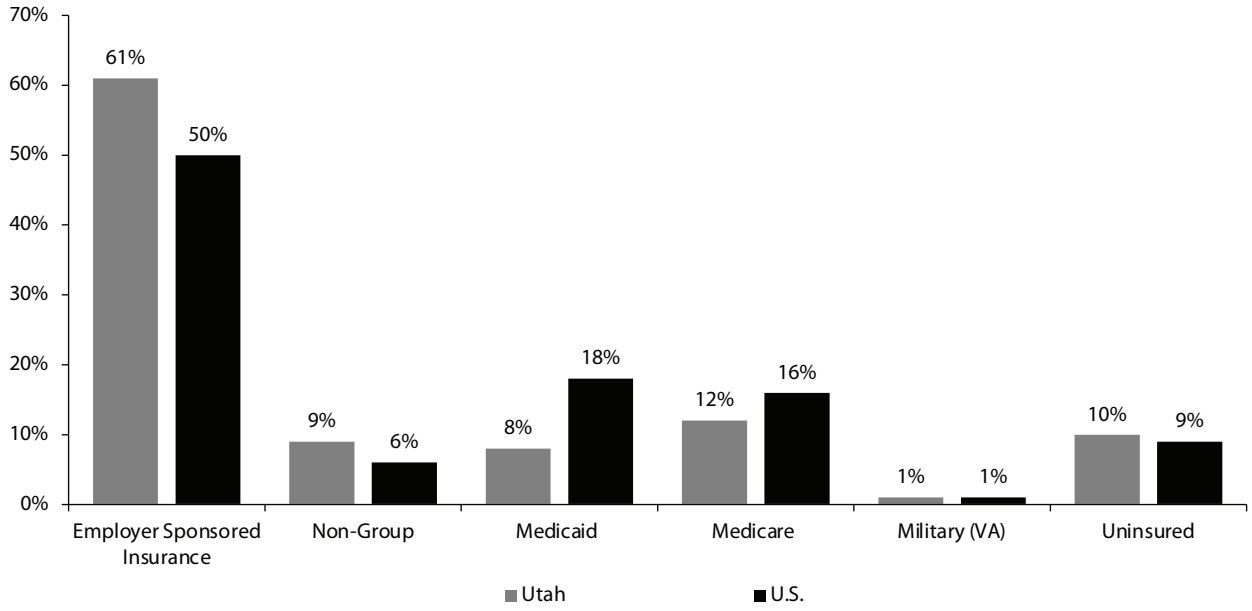
Note: Utah's statewide average hospitalization rate as of December 1, 2020 is 41.7 per 1,000 cases.
Source: Utah Department of Health COVID-19 Surveillance.

Figure 21.6: COVID-19 Cases per 1,000,000 Population by State, December 1, 2020



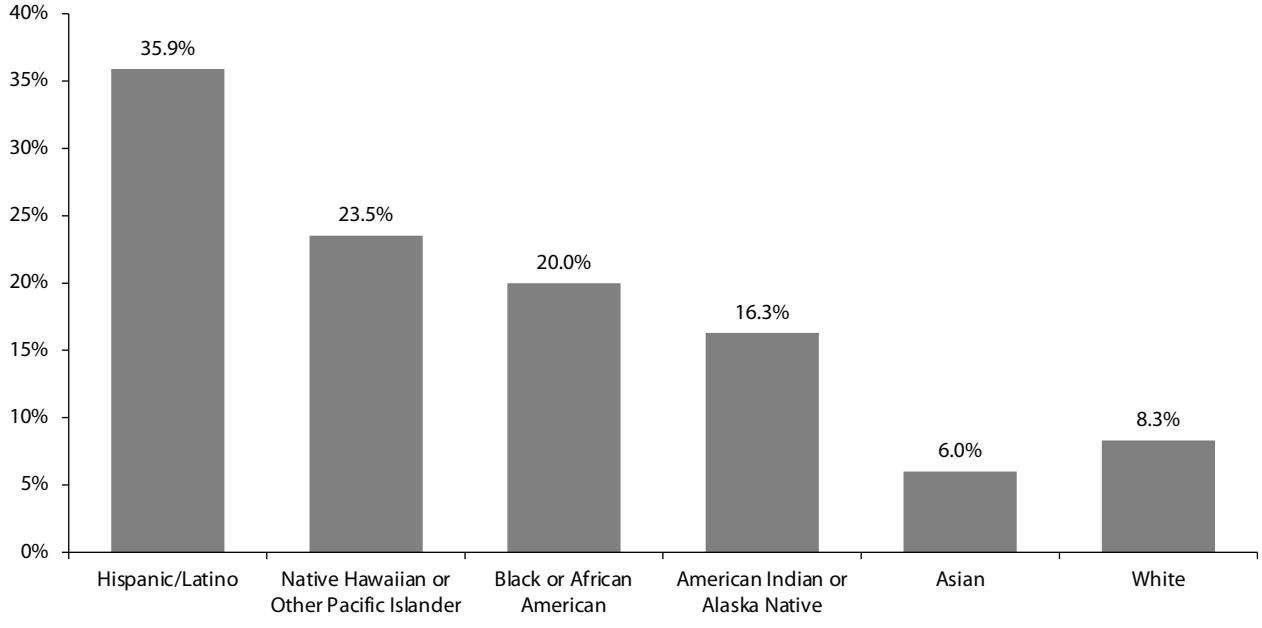
Source: Kaiser Family Foundation estimates based on Johns Hopkins University's COVID-19 Dashboard by the Center for Systems Science and Engineering (CSSE) and 2019 Population data from U.S. Census Bureau.

Figure 21.7: Share of Utah's Population with Health Insurance by Coverage Type, 2019



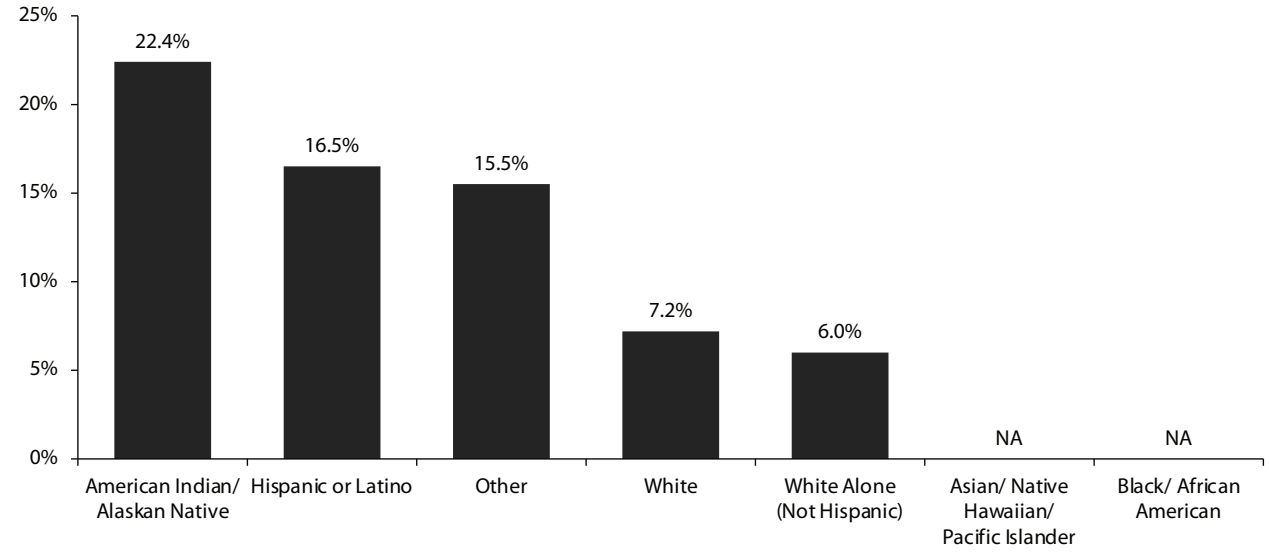
Note: Data may not sum to totals due to rounding. Data may differ from estimates in Tables 21.2 and 21.3 due to different data sources.
Source: Kaiser Family Foundation estimates based on the Census Bureau's American Community Survey 2019 1-Year Estimates.

Figure 21.8: Utah Uninsured Rates Age 18 or Older by Race and Ethnicity, 2017–2019 Average



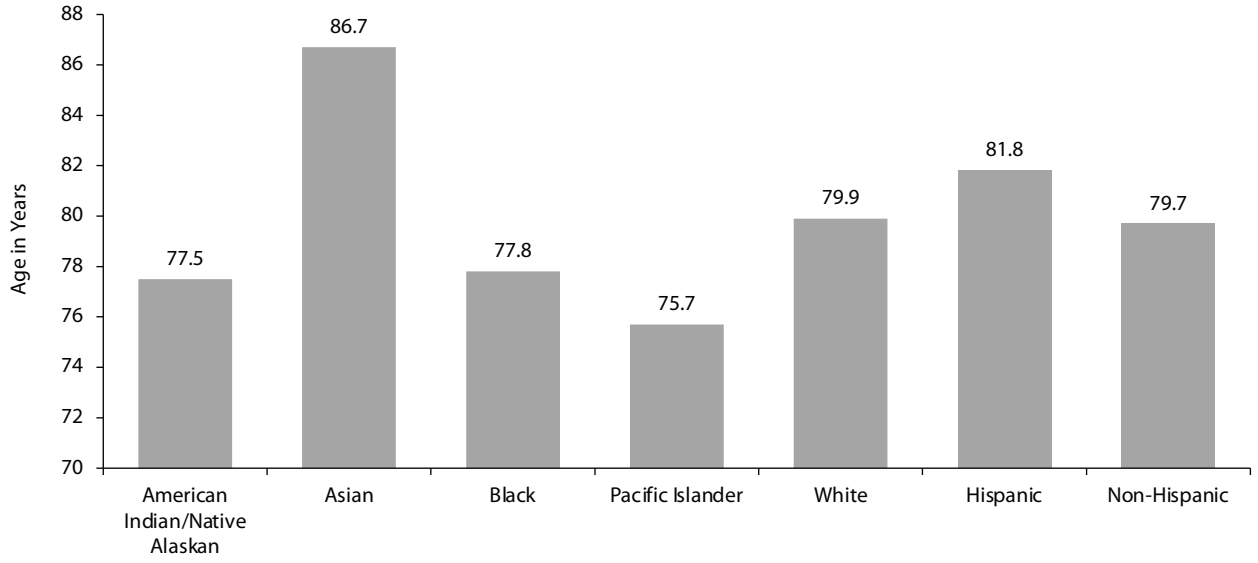
Note: Age-adjusted. Adults age 18 and older.
Source: Utah Department of Health Behavioral Risk Factor Surveillance System (BRFSS).

Figure 21.9: Utah Uninsured Rates Among Children by Race and Ethnicity, 2019



Note: State average is 8.3%
Source: Source: Georgetown University Center for Children and Families analysis of the U.S. Census 2019 American Community Survey (ACS) data using 1-year estimates from Data.Census.Gov (C27001A-I).

Figure 21.10: Utah Life Expectancy by Race and Ethnicity, 2014–2018 Average



Note: Life expectancy can be used to gauge the overall health of a community. Life expectancy at birth by race and ethnicity was calculated using death counts over a span of five years (2014–2018). Life expectancy for the state as a whole is 79.8 years and the national average is 78.6.
Source: Utah Death Certificate Database, Office of Vital Records and Statistics, Utah Department of Health. National Center for Health Statistics.

Table 21.1: Prevalence of Common Diseases Among Utah Adults Age 18 Years and Older, 2011–2019

	Arthritis (Percent)		Asthma (Percent)		Skin Cancer (Percent)		Cancer (all others besides skin cancer) (Percent)		Chronic Obstructive Pulmonary Disease (COPD) (Percent)		Diabetes (Percent)		Depression (Percent)		Heart Disease (Percent)		High Blood Pressure (Percent)		General Health Status (Percent)		Poor Oral Health (Percent)	
Year	**Male**	**Female**	**Male**	**Female**	**Male**	**Female**	**Male**	**Female**	**Male**	**Female**	**Male**	**Female**	**Male**	**Female**	**Male**	**Female**	**Male**	**Female**	**Male**	**Female**	**Male**	**Female**
2011	18.8%	25.0%	6.9%	10.5%	7.9%	7.1%	5.4%	6.4%	4.0%	4.6%	8.2%	6.9%	15.3%	28.6%	8.9%	5.6%	28.6%	22.0%	85%	86.5%	NA	NA
2012	18.6%	25.2%	6.7%	11.2%	7.4%	6.6%	4.8%	6.3%	3.4%	4.8%	8.7%	7.5%	15.0%	26.6%	7.7%	5.4%	27.1%	22.7%	86.9%	85.7%	34.1%	33.6%
2013	18.1%	24.3%	7.2%	10.9%	8.0%	7.2%	5.2%	7.1%	3.7%	4.7%	8.5%	7.2%	15.5%	28.0%	8.1%	5.3%	29.6%	22.6%	88%	85.7%	NA	NA
2014	18.4%	25.0%	6.9%	10.4%	7.9%	6.7%	5.0%	6.9%	3.4%	4.2%	8.5%	7.2%	14.7%	26.8%	8.0%	5.1%	28.1%	22.0%	88.1%	86.5%	32.8%	33.6%
2015	18.4%	23.7%	6.5%	11.4%	8.5%	6.8%	5.5%	6.8%	3.5%	4.1%	8.4%	7.0%	14.4%	27.1%	7.4%	4.9%	28.8%	21.4%	87%	87.1%	NA	NA
2016	18.4%	23.9%	6.4%	10.2%	8.5%	7.2%	5.1%	6.8%	4.0%	4.1%	8.7%	7.0%	14.8%	28.3%	7.4%	4.5%	NA	NA	88.1%	87.4%	34.3%	33.9%
2017	17.6%	23.1%	6.3%	11.4%	8.3%	7.1%	4.7%	7.4%	4.1%	4.0%	8.1%	6.9%	16.1%	29.0%	7.7%	5.4%	29.7%	21.7%	86.3%	85.9%	NA	NA
2018	19.8%	25.9%	7.5%	11.1%	9.8%	6.5%	5.6%	7.5%	4.5%	4.3%	9.6%	8.0%	17.3%	31.3%	7.9%	4.8%	NA	NA	85.1%	85.0%	33.2%	32.0%
2019	21.8%	26.7%	7.7%	12.0%	9.2%	7.3%	4.6%	6.7%	4.2%	4.3%	9.1%	7.8%	16.5%	29.3%	7.1%	4.8%	31.9%	22.2%	85.5%	85.0%	NA	NA

Note: Age-adjusted data. Heart Disease includes angina or coronary heart disease, a heart attack or myocardial infarction, and stroke.
General Health Status is responding that, in general, your health is excellent, very good, or good.
Poor Oral Health is percent of adults that have had any permanent teeth extracted (crude prevalence).
Source: Utah Behavioral Risk Factor Surveillance System, Office of Public Health Assessment, Utah Department of Health.

Table 21.2: Utah's Uninsured Rate by County, Percent, 2006–2018

Year	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Beaver	23.6%	22.6%	21.6%	19.5%	20.7%	20.8%	18.7%	18.9%	15.9%	14.6%	12.0%	12.5%	12.4%
Box Elder	14.0%	13.3%	14.1%	14.7%	15.0%	14.3%	13.7%	12.7%	11.6%	9.1%	8.4%	8.8%	8.8%
Cache	19.8%	18.0%	15.9%	14.8%	15.9%	15.8%	15.1%	14.5%	12.6%	9.5%	9.3%	10.1%	9.8%
Carbon	12.1%	11.6%	13.9%	13.3%	13.9%	14.4%	14.4%	12.6%	14.0%	10.9%	9.4%	10.3%	9.2%
Daggett	24.1%	23.5%	24.5%	19.4%	18.0%	18.7%	15.9%	17.0%	12.8%	11.2%	9.7%	8.8%	8.5%
Davis	11.9%	10.5%	11.8%	11.5%	11.5%	12.0%	10.3%	10.8%	9.6%	8.4%	6.7%	7.0%	6.9%
Duchesne	17.0%	16.6%	20.6%	18.2%	18.7%	19.3%	17.1%	16.4%	17.4%	17.1%	13.7%	15.5%	15.4%
Emery	16.3%	15.5%	16.2%	14.8%	15.7%	15.4%	14.6%	14.4%	13.7%	10.9%	8.7%	9.1%	8.7%
Garfield	20.0%	20.0%	19.6%	17.3%	18.8%	18.1%	18.1%	20.5%	16.9%	15.2%	14.7%	16.3%	14.3%
Grand	19.9%	20.5%	25.3%	22.0%	23.2%	23.6%	21.6%	22.1%	18.1%	16.2%	13.9%	13.2%	12.9%
Iron	19.7%	19.1%	19.5%	18.5%	22.8%	22.3%	18.3%	19.8%	18.2%	16.2%	11.9%	13.7%	12.1%
Juab	13.5%	13.7%	19.3%	15.7%	17.0%	16.1%	14.5%	14.6%	15.0%	12.7%	10.2%	10.6%	10.5%
Kane	18.6%	17.7%	19.7%	20.1%	17.7%	16.8%	18.0%	15.6%	14.2%	10.1%	8.6%	9.6%	9.8%
Millard	21.6%	17.8%	17.2%	20.3%	23.6%	21.8%	20.3%	20.0%	18.8%	17.5%	13.1%	14.9%	14.1%
Morgan	18.3%	16.9%	15.4%	13.1%	12.7%	12.0%	11.3%	10.0%	8.8%	8.2%	6.5%	7.2%	6.9%
Piute	26.9%	19.5%	22.2%	22.5%	25.0%	22.9%	22.1%	25.2%	22.4%	16.0%	12.8%	12.4%	14.6%
Rich	25.5%	26.2%	22.4%	20.1%	20.8%	18.1%	15.9%	18.4%	14.8%	12.5%	10.2%	11.8%	10.1%
Salt Lake	16.6%	16.9%	16.6%	17.0%	17.9%	17.2%	16.9%	16.7%	14.8%	12.2%	10.9%	11.0%	11.8%
San Juan	17.5%	18.1%	26.1%	23.7%	22.5%	23.4%	22.9%	20.8%	20.2%	19.9%	17.1%	17.0%	16.2%
Sanpete	20.7%	19.6%	19.4%	19.2%	23.0%	20.6%	19.5%	19.8%	18.6%	13.6%	12.7%	12.7%	13.4%
Sevier	15.0%	15.1%	17.3%	15.6%	17.0%	18.4%	17.6%	15.5%	16.5%	13.4%	10.6%	12.7%	11.1%
Summit	21.1%	18.0%	13.6%	14.6%	16.0%	14.8%	14.9%	14.5%	13.7%	10.9%	9.5%	9.6%	9.2%
Tooele	14.0%	13.6%	15.5%	14.3%	13.4%	14.2%	12.5%	12.4%	11.8%	9.2%	8.1%	8.4%	10.1%
Uintah	19.6%	19.8%	21.0%	21.0%	20.4%	20.7%	18.1%	16.6%	16.5%	15.7%	12.9%	15.7%	14.8%
Utah	18.0%	15.1%	16.0%	14.1%	15.1%	16.0%	14.4%	13.7%	12.1%	10.5%	7.9%	8.1%	8.8%
Wasatch	19.5%	18.6%	18.5%	18.9%	21.4%	20.8%	18.9%	19.2%	17.7%	15.7%	12.4%	11.9%	11.2%
Washington	21.2%	17.9%	20.7%	19.7%	20.7%	21.25	20.3%	19.4%	19.6%	16.9%	11.6%	13.9%	13.5%
Wayne	22.6%	20.6%	19.3%	16.9%	22.2%	24.2%	22.5%	20.7%	16.8%	16.2%	13.6%	15.2%	13.8%
Weber	15.2%	14.8%	16.65	18.1%	17.7%	17.0%	16.9%	15.3%	14.0%	11.6%	9.6%	10.1%	10.2%
Utah	16.7%	15.7%	16.3%	15.9%	16.7%	16.6%	15.7%	15.3%	13.8%	11.6%	9.7%	10.0%	10.4%
U.S.	17.1%	16.6%	16.6%	17.3%	17.7%	17.3%	17.0%	16.8%	13.5%	10.9%	10.0%	10.2%	10.4%

Note: Uninsured rate is for those age 65 and younger.
Data may differ from estimates in Figure 21.7 and Table 21.3 due to different data sources.
Source: U.S. Census Bureau Small Area Health Insurance Estimates.

Table 21.3: Percent of Utah's Population with Health Insurance by Coverage Type, 2007–2019

	Employer-Sponsored Self-Funded Plans			Commercial Health Insurance		Government-Sponsored Health Plans					
Year	Public Employees Health Plan (PEHP)	Federal Employee Health Benefit Plan (FEHBP)	Other Self-Funded Health Plans	Group	Individual	Medicare	Medicaid	CHIP	PCN	HIP Utah	Uninsured
2007	5.9%	3.4%	30.7%	27.1%	5.3%	9.4%	5.9%	0.9%	0.7%	0.1%	10.6%
2008	5.8%	3.5%	30.4%	26.5%	5.4%	9.6%	6.0%	1.3%	0.7%	0.1%	10.7%
2009	5.8%	3.5%	30.8%	24.5%	5.1%	9.7%	7.0%	1.5%	0.9%	0.1%	11.2%
2010	4.7%	3.6%	26.2%	24.9%	5.0%	10.1%	8.0%	1.5%	0.5%	0.1%	15.3%
2011	4.6%	3.8%	27.9%	23.6%	5.6%	10.3%	8.7%	1.3%	0.6%	0.1%	13.4%
2012	4.5%	3.4%	29.5%	22.2%	5.5%	10.7%	9.0%	1.3%	0.6%	0.1%	13.2%
2013	4.3%	3.3%	31.4%	21.9%	5.4%	10.9%	9.3%	1.2%	0.6%	0.1%	11.6%
2014	4.2%	3.3%	32.7%	20.6%	7.0%	11.2%	9.8%	0.5%	0.5%	NA	10.3%
2015	4.3%	3.4%	33.7%	20.0%	7.6%	11.4%	9.9%	0.6%	0.4%	NA	8.8%
2016	4.4%	3.4%	35.0%	18.1%	7.8%	11.7%	9.8%	0.6%	0.6%	NA	8.7%
2017	4.5%	3.7%	35.0%	17.7%	6.6%	12.0%	9.6%	0.6%	0.4%	NA	9.8%
2018	4.7%	3.4%	36.2%	16.3%	6.5%	12.6%	9.6%	0.6%	0.4%	NA	9.5%
2019	4.8%	3.5%	36.2%	15.7%	6.6%	13.2%	9.9%	0.5%	NA	NA	9.7%

Note: The employer-sponsored self-funded membership estimate is based on limited data from commercial insurers and employers. It is not a complete count of the self-funded membership in Utah and should be used with caution. Estimates may not total exactly due to rounding and differences in methodology.
PCN (Primary Care Network) is a limited-benefit health plan offered by the Utah Department of Health to adults who are not traditionally eligible for Medicaid.
The PCN program closed on March 31, 2019. Members previously enrolled in PCN were automatically enrolled in Medicaid.
HIP Utah (Utah Comprehensive Health Insurance Pool) was discontinued in 2014 with the Affordable Care Act.
Data may differ from estimates in Figure 21.7 and Table 21.2 due to different data sources.
Source: State of Utah Health Insurance Market Reports.

Table 21.4: Utah's Private Sector Health Care Employment by Facility Type, 2001–2019

Year	Provider Offices					Mental Health Provider Offices			
	Physicians	Dentists	Chiropractors	Podiatrists	Optometrists	Mental Health Physicians	Mental Health Practitioners	Specialty Therapists	Miscellaneous Health Practitioner Offices
2001	12,046	7,779	898	209	506	138	358	1,578	298
2002	12,555	8,098	1,011	228	505	133	374	1,722	316
2003	13,301	8,459	1,040	242	525	136	369	1,775	378
2004	13,793	8,708	1,030	257	545	149	406	1,864	414
2005	14,446	8,981	1,052	256	573	148	434	1,976	500
2006	16,416	9,431	1,051	273	618	138	446	1,985	586
2007	17,393	9,800	1,097	287	647	117	449	1,989	726
2008	18,551	10,109	1,099	284	690	123	482	2,084	822
2009	19,140	10,408	1,123	292	726	127	523	2,157	868
2010	19,624	10,676	1,123	299	751	148	541	2,308	875
2011	19,800	10,976	1,189	286	766	174	571	2,503	1,052
2012	20,213	11,272	1,246	294	804	197	635	2,568	971
2013	20,515	11,527	1,303	298	868	217	686	2,696	985
2014	19,660	11,737	1,376	288	915	336	774	2,890	1,154
2015	20,123	12,116	1,397	303	959	360	837	2,970	1,316
2016	20,855	12,401	1,464	310	999	415	922	3,061	1,558
2017	20,973	12,701	1,591	316	1,040	442	966	3,155	1,577
2018	21,660	13,166	1,678	329	1,090	444	1,064	3,234	1,332
2019	21,084	13,457	1,753	346	1,144	467	1,240	3,319	1,145
Avg. Annual % Increase									
	3.2%	3.1%	3.8%	2.8%	4.6%	7.0%	7.1%	4.2%	7.8%

Note: Mental Health Practitioners: This industry comprises establishments of independent mental health practitioners (except physicians) primarily engaged in (1) the diagnosis and treatment of mental, emotional, and behavioral disorders and/or (2) the diagnosis and treatment of individual or group social dysfunction brought about by such causes as mental illness, alcohol and substance abuse, physical and emotional trauma, or stress. These practitioners operate private or group practices in their own offices (e.g., centers, clinics) or in the facilities of others, such as hospitals or HMO medical centers.
Specialty Therapists: This industry comprises establishments of independent health practitioners primarily engaged in one of the following: (1) providing physical therapy services to patients who have impairments, functional limitations, disabilities, or changes in physical functions and health status resulting from injury, disease or other causes, or who require prevention, wellness or fitness services; (2) planning and administering educational, recreational, and social activities designed to help patients or individuals with disabilities regain physical or mental functioning or adapt to their disabilities; and (3) diagnosing and treating speech, language, or hearing problems. These practitioners operate private or group practices in their own offices (e.g., centers, clinics) or in the facilities of others, such as hospitals or HMO medical centers.
Miscellaneous Health Practitioners: This U.S. industry comprises establishments of independent health practitioners (except physicians; dentists; chiropractors; optometrists; mental health specialists; physical, occupational, and speech therapists; audiologists; and podiatrists). These practitioners operate private or group practices in their own offices (e.g., centers, clinics) or in the facilities of others, such as hospitals or HMO medical centers. Examples include acupuncturists' (except MDs or DOs) offices, hypnotherapists' offices, and dental hygienists' offices
Source: U.S. Bureau of Labor Statistics Quarterly Census of Employment and Wages.

Table 21.4 (Continued): Utah's Private Sector Health Care Employment by Facility Type, 2001–2019

Year	Medical Services				Medical Facilities			Hospitals			Health and Medical Insurance Carriers
	Outpatient Care Centers	Medical and Diagnostic Laboratories	Home Health Care Services	Other Ambulatory Health Care Services	Skilled Nursing Care Facilities	Residential Mental Health Facilities	Assisted Living Facilities	General Medical and Surgical Hospitals	Psychiatric and Substance Use Disorder Hospitals	Other Specialty Hospitals	
2001	1,428	1,864	2,953	927	8,474	3,984	2,440	22,655	NA	NA	2,713
2002	1,619	2,039	3,239	958	8,411	4,329	2,608	23,201	NA	NA	2,673
2003	1,471	2,175	3,647	908	8,482	4,586	2,804	24,156	536	2,954	2,529
2004	1,688	2,410	3,960	861	8,689	4,853	3,113	24,693	596	2,992	2,456
2005	1,902	2,491	4,161	916	8,825	5,143	3,286	25,400	NA	NA	2,443
2006	2,189	2,621	4,564	1,017	8,770	5,503	3,454	24,961	554	3,147	2,268
2007	2,315	2,800	4,693	1,093	8,870	5,950	3,583	25,808	539	3,314	2,490
2008	2,486	3,080	5,005	1,272	9,350	6,214	3,813	26,822	526	3,538	2,501
2009	2,432	3,251	5,595	1,350	9,331	6,444	4,257	27,346	428	3,646	2,437
2010	2,546	3,515	5,804	1,248	9,412	6,291	4,457	27,910	474	3,631	2,280
2011	2,569	3,546	6,344	1,327	9,382	6,486	4,664	28,389	668	3,569	2,359
2012	2,726	3,483	6,826	1,625	9,262	6,787	4,888	29,027	727	3,521	2,501
2013	2,789	3,543	7,339	1,832	9,194	7,016	5,264	29,528	702	3,645	2,735
2014	3,097	3,621	7,485	2,024	9,404	7,399	5,466	29,728	697	3,800	2,839
2015	3,022	3,714	7,653	2,268	9,492	8,159	5,883	30,824	744	3,824	2,622
2016	3,157	4,080	7,947	2,329	9,428	8,388	6,351	32,218	745	3,878	2,772
2017	3,352	4,403	8,065	2,499	9,463	8,604	6,912	33,315	771	3,972	2,633
2018	3,530	4,556	8,168	2,750	9,349	9,414	7,392	32,758	833	3,933	2,582
2019	3,759	4,886	8,408	2,659	9,161	9,600	7,802	34,476	854	3,994	2,690
Avg. Annual % Increase											
	5.5%	5.5%	6.0%	6.0%	0.4%	5.0%	6.7%	2.4%	3.4%	1.9%	-0.0%

Note: Other Ambulatory Health Care Services: This U.S. industry comprises establishments primarily engaged in providing ambulatory health care services (except offices of physicians, dentists, and other health practitioners; outpatient care centers; medical and diagnostic laboratories; home health care providers; ambulances; and blood and organ banks). Examples include health screening services (except by offices of health practitioners), physical fitness evaluation services (except by offices of health practitioners), hearing testing services (except by offices of audiologists), and smoking cessation programs.
Other Specialty Hospitals: This industry comprises establishments known and licensed as specialty hospitals primarily engaged in providing diagnostic and medical treatment to inpatients with a specific type of disease or medical condition (except psychiatric or substance abuse). Hospitals providing long-term care for the chronically ill and hospitals providing rehabilitation, restorative, and adjustive services to physically challenged or disabled people are included in this industry. These establishments maintain inpatient beds and provide patients with food services that meet their nutritional requirements. They have an organized staff of physicians and other medical staff to provide patient care services. These hospitals may provide other services, such as outpatient services, diagnostic X-ray services, clinical laboratory services, operating room services, physical therapy services, educational and vocational services, and psychological and social work services.
Source: U.S. Bureau of Labor Statistics Quarterly Census of Employment and Wages.

Economic Regions

22

Michael Hogue, Kem C. Gardner Policy Institute

2020 OVERVIEW

New Economic Regions

In 2020, the Kem C. Gardner Policy Institute published a report with updated economic regions for the state[1], based on a county-level analysis of commuting patterns, where Utahns travel to receive healthcare, and industry similarity (among other considerations). This set of regions is shown in Table 22.1 and Figure 22.1, along with two others: the Utah Association of Governments (AOGs) and a set of regions proposed in 1966 (Proposed 1966) that served as their forerunner.

Although the Gardner 2020 regions were created to facilitate modeling and reporting of Utah's long-term demographic and economic projections, we believe they could be useful more broadly. This chapter summarizes our approach and results.

Overview

In general, a region is a set of areas that are connected or related to each other in ways that are important for understanding, discussing, or acting on some particular issue. Areas within the same region will tend to be more strongly related than areas in different regions, but there may be as many "ways that are important" as there are issues.

The regions that make up Gardner 2020 are based, in large part, on the idea of grouping Utah's counties together in such a way as to minimize commuting between counties in different groups. Such groups are sometimes called "commuter sheds" or "local labor markets." Commuting connections are important because they indicate that a portion of the income earned by residents of one county depend on jobs located in another county. Our focus on delineating local labor markets addresses analytical and reporting needs for work at the Policy Institute.

Another type of connection exists among counties that are specialized in the same sorts of industries, such as the tourism-oriented counties in the southern part of the state. Their similar industry composition may mean they experience certain kinds of economic shocks similarly.

The geographical pattern of consumption links the income earned by one county to the income and jobs of another. We glimpse this through data on healthcare travel, showing the number of trips made by residents of one county to receive healthcare in another county.

Comparisons with Existing Regions

In terms of boundaries, there is a great deal of common ground between the older delineations and ours. This is particularly interesting given that the other delineations are 50 years old. In areas where there are differences, these differences generally contribute to improved performance as economic regions.

Compared with AOGs and Proposed 1966, Gardner 2020 unites northern Utah into a single region—Greater Salt Lake. In AOGs and Proposed 1966, Box Elder, Cache, and Rich are together in the same region, but not the same region as Salt Lake.

Beaver, Garfield, Iron, Kane, and Washington counties constitute a single region in all three delineations. This region is called "Southwest" in Gardner 2020, "Southwestern" in Proposed 1966, and "Five County" in AOGs. Other counties that are part of the same region in all three delineations include Carbon and Emery; Daggett, Duchesne, and Uintah; Grand and San Juan; Summit, Utah, and Wasatch; Millard, Piute, Sanpete, Sevier, and Wayne; Salt Lake and Tooele; and Morgan and Davis.

1. The full report is available on the Policy Institute's website: https://gardner.utah.edu/wp-content/uploads/EconRegions-Nov2020.pdf.

Commuting to Work

We delineate local labor markets by gathering together counties with strong commuting connections. The algorithm we use to accomplish this is called hierarchical agglomerative clustering and has been used in numerous studies with objectives similar to ours. The full report provides further details. We carry out this algorithm using data from the 2011–2015 American Community Survey, which provides estimates of the number of commutes between each pair of counties in the U.S.[2]

Summary measures of how successfully Gardner 2020 encloses local labor markets are shown in Table 22.2. There are two senses in which a region can be enclosed with respect to commuting. First, a large share of those working in the region are residents of the region. This is called the inflow percent. Second, a large share of the working residents of a region work in the region. This is called the outflow percent. In a good delineation, the minimum and average inflow percent should be large within regions, and the maximum and average should be small between regions. Likewise, for the outflow percent. Note that the "within" of the inflow percent refers to the percent of a region's workers who live in that region, while the "between" refers to the percentage of a region's workers who live in a different region. Similarly, the "within" of the outflow percent refers to the percent of a region's employed residents who commute to work within that same region, while the "between" refers to the percentage of a region's employed residents who commute to work in a different region. On the measures presented in Table 22.2, Gardner 2020 performs better than Proposed 1966 and AOGs across the board.

Table 22.3 shows outflow commuting patterns between Gardner 2020 regions. For all but two counties, at least 90% of commuting is contained within the county's region.

Health Care

We created regions that enclose health care visits using the same method we used for commuting.[3] In the early 1990s this method was used by the National Center for Health Statistics (NCHS) to create such regions (called "health service areas") for the U.S.[4] The NCHS regions are based on outpatient visits and only for those using Medicare. We follow the NCHS approach by considering trips only for outpatient services but, unlike NCHS, include visits from all types of payees, not just Medicare.

Tables 22.4 and 22.5 are analogous to Tables 22.2 and 22.3, referring to health care trips rather than commuting. These tables show that Gardner 2020 regions also make for reasonably good health service areas. In fact, as health service areas, Gardner 2020 is competitive with the delineation we created specifically to enclose health care visits.

Industry Similarity

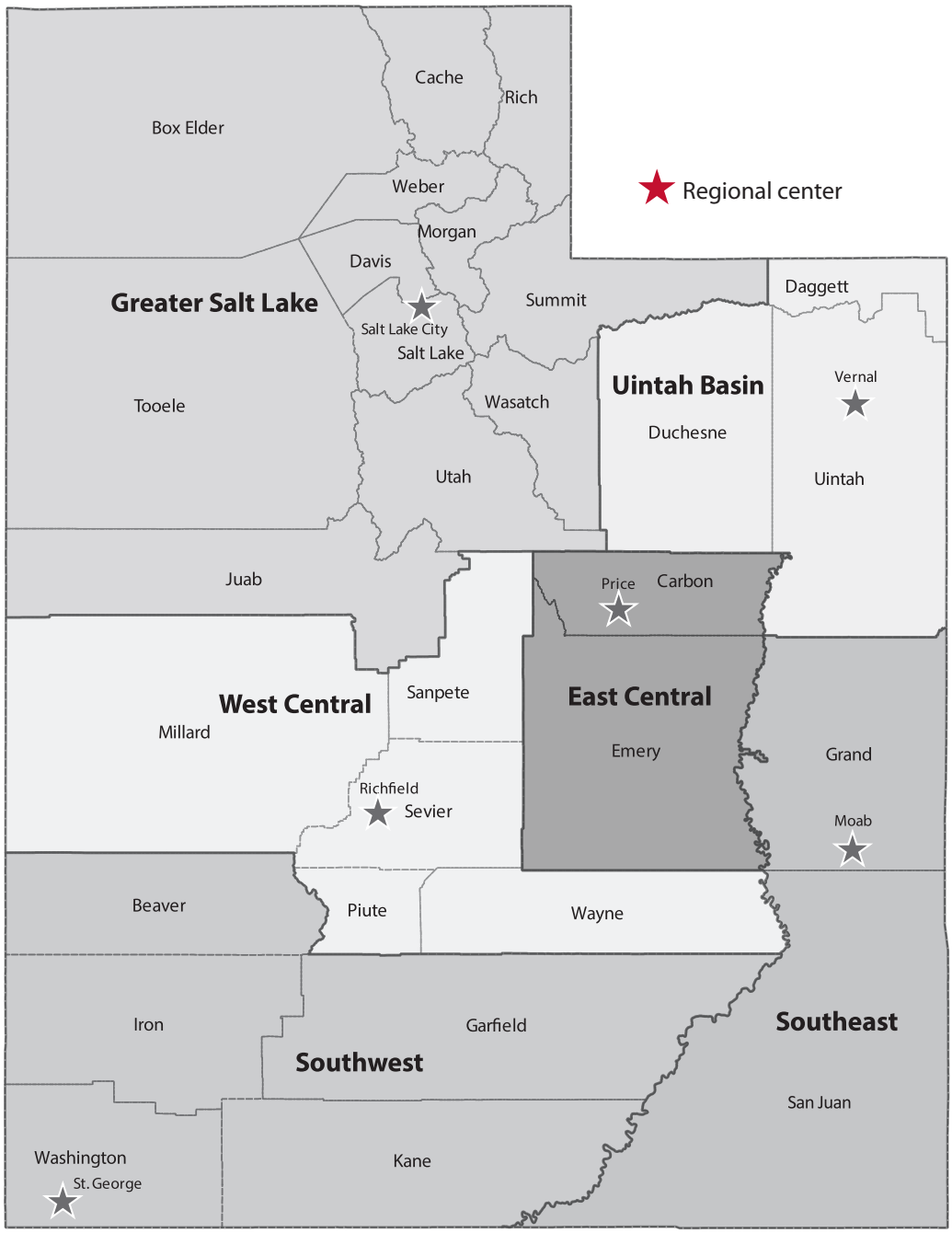
Compared with commuting, and to a lesser extent health care travel, there is less of a tendency for counties that are close in geographical space to be close in terms of industry similarity. Unlike the cases of commuting and health care, hierarchical clustering does not yield regions consisting of contiguous counties without adding a penalty for the distance between counties. We instead use an approach that guarantees the contiguity constraint is satisfied.

In general, while Gardner 2020 regions perform slightly better on industry similarity than AOGs and Proposed 1966, they do not bring together counties with similar industry compositions with the same success as they enclose commuting and health care travel.

Decision-makers can use these economic regions to inform public and private investment, planning, and policy decisions.

2. American Community Survey, 2011–2015, U.S. Census Bureau.
3. Data for this analysis was provided by the Utah Office of Health Care Statistics.
4. See: Makuc, D. M., Haglund, B. J. A., Ingram, D. D., Kleinman, J. C., & Feldman, J. J. (1991). Health Service Areas for the United States. U.S. Department of Health and Human Services, Public Health Service, Centers for Disease Control, National Center for Health Statistics.

Figure 22.1: Utah's Economic Regions



Source: Kem C. Gardner Policy Institute

Table 22.1: Utah Regional Delineations

Deliniation	Region	Counties
Gardner 2020	East Central	Carbon and Emery
	Greater Salt Lake	Box Elder, Cache, Davis, Juab, Morgan, Rich, Salt Lake, Summit, Tooele, Utah, Wasatch, and Weber
	Southeast	Grand and San Juan
	Southwest	Beaver, Garfield, Iron, Kane, and Washington
	Uintah Basin	Daggett, Duchesne, and Uintah
	West Central	Millard, Piute, Sanpete, Sevier, and Wayne
Proposed 1966	Eastern	Carbon, Daggett, Duchesne, Emery, Grand, San Juan, and Uintah
	North Central	Salt Lake, Summit, Tooele, Utah, and Wasatch
	North	Box Elder, Cache, Davis, Morgan, Rich, and Weber
	South Central	Juab, Millard, Piute, Sanpete, Sevier, and Wayne
	Southwestern	Beaver, Garfield, Iron, Kane, and Washington
AOGs	Bear River	Box Elder, Cache, and Rich
	Five County	Beaver, Garfield, Iron, Kane, and Washington
	Mountainland	Summit, Utah, and Wasatch
	Six County	Juab, Millard, Piute, Sanpete, Sevier, and Wayne
	Southeast Utah	Carbon, Emery, Grand, and San Juan
	Uintah Basin	Daggett, Duchesne, and Uintah
	Wasatch Front Regional Council	Davis, Morgan, Salt Lake, Tooele, and Weber

Source: Kem C Gardner Policy Institute.

Table 22.2: Commuting Containment

	Inflow Percent				Outflow Percent			
	Within		Between		Within		Between	
Delineation	Min	Average	Max	Average	Min	Average	Max	Average
Proposed 1966	92.4%	95.4%	7.1%	1.1%	81.5%	93.0%	18.4%	1.8%
AOGs	90.2%	95.0%	8.8%	0.8%	83.9%	93.4%	15.5%	1.1%
Gardner 2020	94.6%	96.8%	4.6%	0.6%	91.5%	97.3%	6.0%	0.5%

Source: Kem C. Gardner Policy Institute Source: Kem C. Gardner Policy Institute analysis of data from the U.S. Census Bureau, 2011–2015 American Community Survey.

Table 22.3: Commuting Patterns Between Gardner 2020 Regions

Region/County	East Central	Greater Salt Lake	Southeast	Southwest	Uintah Basin	West Central
East Central						
Carbon	96.4%	2.6%	0.0%	0.2%	0.5%	0.4%
Emery	96.8%	1.3%	1.2%	0.1%	0.4%	0.2%
Greater Salt Lake						
Box Elder	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%
Cache	0.0%	99.9%	0.0%	0.0%	0.0%	0.0%
Davis	0.0%	99.9%	0.0%	0.0%	0.1%	0.0%
Juab	0.5%	95.3%	0.0%	0.1%	0.1%	4.1%
Morgan	0.0%	99.6%	0.0%	0.0%	0.4%	0.0%
Rich	0.0%	99.7%	0.0%	0.3%	0.0%	0.0%
Salt Lake	0.0%	99.8%	0.0%	0.0%	0.1%	0.0%
Summit	0.0%	99.7%	0.0%	0.0%	0.2%	0.0%
Tooele	0.0%	99.8%	0.0%	0.0%	0.2%	0.0%
Utah	0.1%	99.6%	0.0%	0.1%	0.1%	0.1%
Wasatch	0.0%	98.8%	0.0%	0.0%	1.2%	0.0%
Weber	0.0%	99.9%	0.0%	0.0%	0.0%	0.0%
Southeast						
Grand	0.0%	1.3%	98.7%	0.0%	0.0%	0.0%
San Juan	0.2%	0.3%	99.0%	0.1%	0.4%	0.0%
Southwest						
Beaver	0.0%	0.9%	0.0%	96.3%	0.0%	2.9%
Garfield	0.0%	0.3%	5.2%	91.3%	0.0%	3.2%
Iron	0.0%	1.3%	0.3%	97.9%	0.2%	0.3%
Kane	0.0%	0.1%	0.7%	99.1%	0.1%	0.0%
Washington	0.0%	1.1%	0.0%	98.8%	0.0%	0.1%
Uintah Basin						
Daggett	0.0%	2.2%	0.0%	0.0%	97.8%	0.0%
Duchesne	0.1%	2.0%	0.0%	0.0%	97.9%	0.0%
Uintah	0.0%	0.7%	0.0%	0.0%	99.1%	0.1%
West Central						
Millard	0.0%	3.3%	0.0%	1.0%	0.1%	95.6%
Piute	0.0%	1.7%	0.0%	15.4%	0.0%	82.9%
Sanpete	2.5%	11.7%	0.0%	0.3%	0.6%	84.9%
Sevier	0.3%	1.8%	0.0%	0.9%	0.0%	97.0%
Wayne	0.0%	1.4%	1.4%	1.6%	0.0%	95.6%

Source: Kem C. Gardner Policy Institute Source: Kem C. Gardner Policy Institute analysis of data from the U.S. Census Bureau, 2011–2015 American Community Survey.

Table 22.4: Health Care Containment

	Inflow Percent				Outflow Percent			
	Within		Between		Within		Between	
Delineation	Min	Average	Max	Average	Min	Average	Max	Average
Proposed 1966	86.0%	89.8%	10.4%	2.5%	56.3%	75.7%	37.4%	6.1%
AOGs	83.6%	89.8%	8.1%	1.7%	56.3%	74.8%	27.2%	4.2%
Gardner 2020	87.4%	92.2%	9.1%	1.6%	54.1%	73.7%	40.0%	5.3%

Source: Kem C. Gardner Policy Institute analysis of data from the Utah Office of Health Care Statistics.

Table 22.5: Health Care Travel Patterns Among Gardner 2020 Regions

Region/County	East Central	Greater Salt Lake	Southeast	Southwest	Uintah Basin	West Central
East Central						
Carbon	59.9%	38.4%	0.2%	0.9%	0.3%	0.3%
Emery	59.6%	37.0%	0.5%	1.1%	0.1%	1.6%
Greater Salt Lake						
Box Elder	0.0%	98.8%	0.0%	1.1%	0.0%	0.1%
Cache	0.0%	98.1%	0.0%	1.8%	0.0%	0.1%
Davis	0.0%	99.4%	0.0%	0.5%	0.1%	0.1%
Juab	0.1%	95.7%	0.0%	0.7%	0.0%	3.5%
Morgan	0.0%	99.5%	0.0%	0.5%	0.0%	0.0%
Rich	0.0%	96.9%	0.0%	3.1%	0.0%	0.0%
Salt Lake	0.0%	99.4%	0.0%	0.4%	0.1%	0.1%
Summit	0.0%	99.4%	0.0%	0.4%	0.0%	0.1%
Tooele	0.0%	99.2%	0.0%	0.5%	0.1%	0.2%
Utah	0.1%	98.9%	0.0%	0.7%	0.1%	0.2%
Wasatch	0.0%	98.5%	0.0%	0.9%	0.2%	0.3%
Weber	0.0%	99.4%	0.0%	0.4%	0.1%	0.1%
Southeast						
Grand	4.1%	31.0%	64.1%	0.6%	0.1%	0.1%
San Juan	0.6%	20.2%	77.8%	1.1%	0.1%	0.0%
Southwest						
Beaver	0.0%	14.6%	0.0%	82.6%	0.1%	2.7%
Garfield	0.0%	20.1%	0.0%	74.7%	0.0%	5.2%
Iron	0.0%	12.5%	0.0%	86.6%	0.2%	0.6%
Kane	0.0%	30.9%	0.0%	68.9%	0.1%	0.1%
Washington	0.0%	15.6%	0.1%	84.0%	0.1%	0.2%
Uintah Basin						
Daggett	0.1%	46.6%	0.2%	1.2%	51.7%	0.3%
Duchesne	0.5%	25.7%	0.0%	0.8%	72.8%	0.2%
Uintah	0.8%	25.4%	0.1%	0.5%	72.9%	0.2%
West Central						
Millard	0.1%	52.0%	0.0%	5.4%	0.1%	42.4%
Piute	0.0%	18.7%	0.0%	38.0%	0.3%	43.0%
Sanpete	0.1%	50.1%	0.0%	2.0%	0.1%	47.7%
Sevier	0.2%	27.3%	0.0%	7.4%	0.1%	65.0%
Wayne	0.9%	24.0%	0.0%	8.0%	0.3%	66.8%

Source: Kem C. Gardner Policy Institute analysis of data from the Utah Office of Health Care Statistics.

Nonprofit Sector

23

Collyn Mosquito, Utah Nonprofits Association
Brandy Strand, Utah Nonprofits Association
Kate Rubalcava, Utah Nonprofits Association

2020 OVERVIEW

IRS exempt organization data show that Utah has 10,707 nonprofits operating within the state, with combined assets worth $33.9 billion, a 4.3% increase from the year prior.[1] The sector also reported a combined total income of $27.0 billion, a 14.1% increase from the year previous, and a combined total revenue of $16.8 billion, a 12.8% increase.[2] According to the IRS, income is revenue with expenses added back in[3] and revenue is simply the gross receipts of all sources of revenue.[4]

There are 8,939 501(c)(3) tax exempt organizations in Utah, a 3.9% increase from 2019.[5] Of the total 501(c)(3) organizations, the IRS designated 6,205 (69.4%) of them as charitable organizations, 1,844 (20.6%) as educational, and 802 (9.0%) as religious.[6] The remaining 89 organizations were designated as literary organizations, organizations to prevent cruelty to animals, organizations to prevent cruelty to children, organizations for public safety training, scientific organizations, and other/unclassified. Of the 26 National Taxonomy of Exempt Entity (NTEE) code groups, besides unknown/unclassified: 1,112 organizations (10.4% of all nonprofits) were classified as education organizations, 912 (8.5%) were classified as philanthropy, voluntarism, and grant-making foundations, and 854 (8.0%) were arts organizations.[7]

The COVID-19 pandemic has dramatically altered the economic landscape for nonprofits. The Utah Nonprofits Association surveyed 199 nonprofits in August 2020 to gauge the pandemic's ongoing impact. About one in seven respondents said their organizations could only continue operating for five or fewer months, and 26.0% of respondents said their organizations would not survive the pandemic at all.[8] According to the Bureau of Labor Statistics, nonprofits accounted for 6.7% of all jobs in Utah in 2016.[9] Assuming the share has not changed, the closing of 26.0% of Utah's nonprofits could amount to over 27,000 lost jobs.[10] Furthermore, of those nonprofits outside the Wasatch Front, 19.0% predicted the end of their services within five months, compared with 13.0% along the Wasatch Front, an increased closure rate of over 46.0%.[11] Organizations providing health and human services saw an increase in donations in the immediate aftermath of the pandemic, directing these funds to cover the increased demand for food and other necessities.[12]

Qualitative case studies[13] of nonprofits located in various parts of the state also indicate that nonprofits are facing serious economic damage. A Salt Lake City-based nonprofit reported losing 2.5 months of revenue, as well as all its onsite and off-site programming, resulting in a 40% loss in revenue for 2020. An environmental conservation nonprofit has seen its existing membership step up their giving, but at the same time, it saw a 22% drop in donations from new donors and an $80,000 loss in revenue because of a canceled fundraising campaign. An arts nonprofit reported comparable results, with current donors stepping up and new

1 "Exempt Organizations Business Master File Extract." Internal Revenue Service, October 15, 2020.
2 Ibid.
3 "EO BMF Information Sheet," *Internal Revenue Service,* April 2014.
4 "Instructions for Form 990 Return of Organization Exempt From Income Tax (2019)," *Internal Revenue Service*, 2019.
5 "Exempt Organizations Business Master File Extract." *Internal Revenue Service*, October 15, 2020.
6 Ibid.
7 Ibid.
8 Kate Rubalcava, M·Ed., "Economy Threatens Nonprofit Closures and 20,000 Job Losses," *Utah Nonprofits Association*, August 19, 2020.
9 "Nonprofits Account for 12.3 million Jobs, 10.2 Percent of Private Sector Employment, in 2016." *United States Bureau of Labor Statistics*, August 31, 2018.
10 Rubalcava, "Economy Threatens Nonprofit Closures."
11 Ibid.
12 Ibid.
13 "Qualitative Study on Nonprofits in Utah," *Utah Nonprofits Association,* November 2020.

donors being hard to come by, but it has also reported that some of the foundations it relies on had to step back from giving. Lastly, a statewide civic engagement nonprofit has reported having to merge with another nonprofit because of steep revenue losses from the pandemic.

According to the latest available federal Paycheck Protection Program (PPP) data, 550 nonprofit organizations in Utah received a total of $23,150,001 in PPP loans less than $150,000, which has potentially protected 4,710 jobs.[14] For PPP loans greater than $150,000, 206 nonprofits were reported receiving these larger loans, potentially protecting 17,715 jobs (data on the total amount for all loans made above $150,000 was not available).[15] A partnership between UServeUtah and the Utah Nonprofits Association distributed 20 grants totaling $92,915 to nonprofits.[16] The Utah Department of Heritage and Arts has provided $18,193,900 in grants to artists, arts organizations, and museum organizations, with most of the funding coming from CARES act appropriations.[17] Finally, as of November 20, 2020, the Governor's Office of Economic Development has distributed a total of $4,504,154 in grants and loans to 77 nonprofits in rural counties and 158 nonprofits in urban counties (Davis, Salt Lake, Utah, Weber).[18]

2021 OUTLOOK

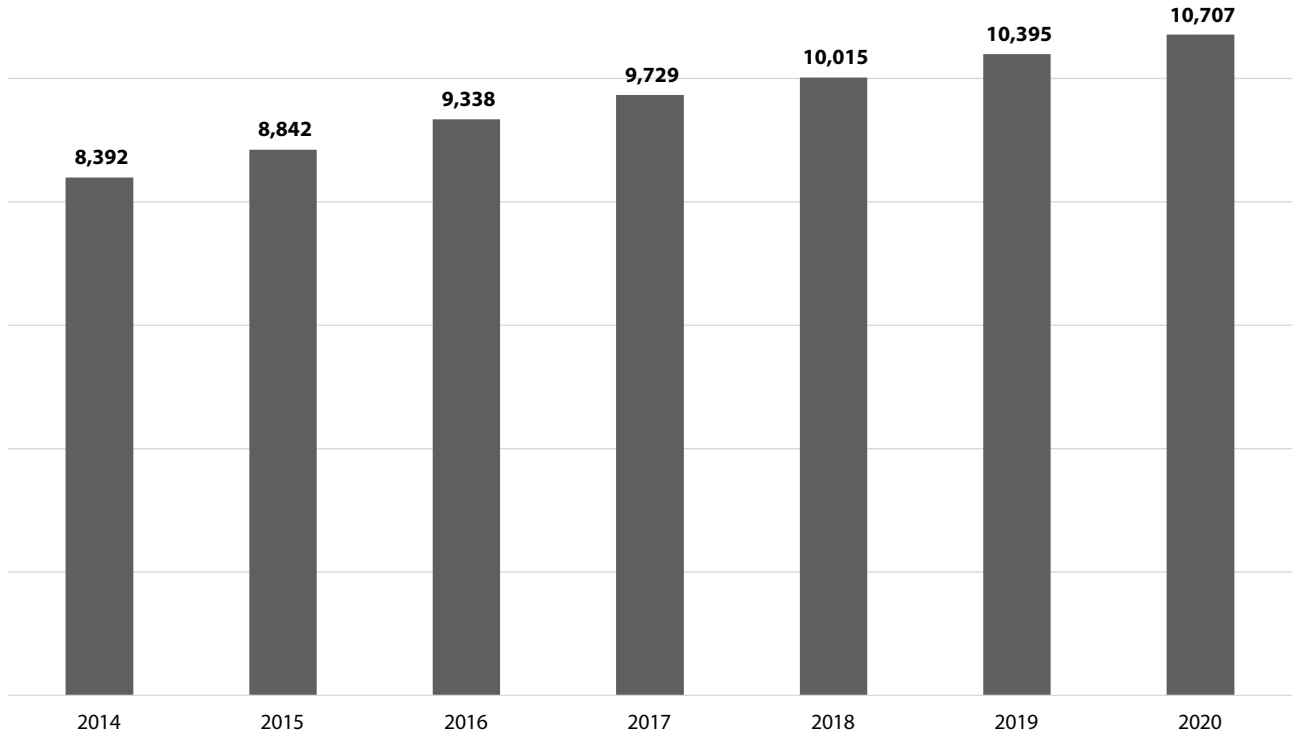
The COVID-19 pandemic has exacerbated the need for the services provided by nonprofits while decreasing their resources. With PPP loans no longer available, supplemental unemployment benefits expiring, and other aid ending, the economic damage done by the pandemic may lengthen recovery for many nonprofits. Increased demand for nonprofit services will likely continue for most of 2021, but economic conditions may lead to more revenue loss and nonprofit mergers and closures.

Further dampening recovery is the increasingly complicated charitable giving landscape. A recent survey conducted by Give.org, an arm of the Better Business Bureau, found the pandemic has significantly altered giving attitudes. Respondents said they were more likely to support businesses, social ventures, and to give to family and friends more in 2020 than in 2019.[19] Yet, one out of four respondents said they are likely to give more to charity, a 6.4% drop from March 2020. Furthermore, between March and August 2020, the number of young people who expressed intent to give more dropped from 60.8% to 41.7%. While most respondents indicate they want to maintain or increase their giving to houses of worship and charities, the giving landscape rapidly becomes much more nuanced because of the economic downturn, especially between age groups. While intentions to invest in nonprofits are high, the ongoing economic environment is requiring individuals to make tough decisions on where to give their limited resources.

Utah's economy remains one of the strongest in the nation.[20] With the Provo-Orem, Ogden-Clearfield, and Salt Lake City metro areas remaining the top most giving metro areas in the country,[21] current and new donors could continue giving to nonprofits across the state.

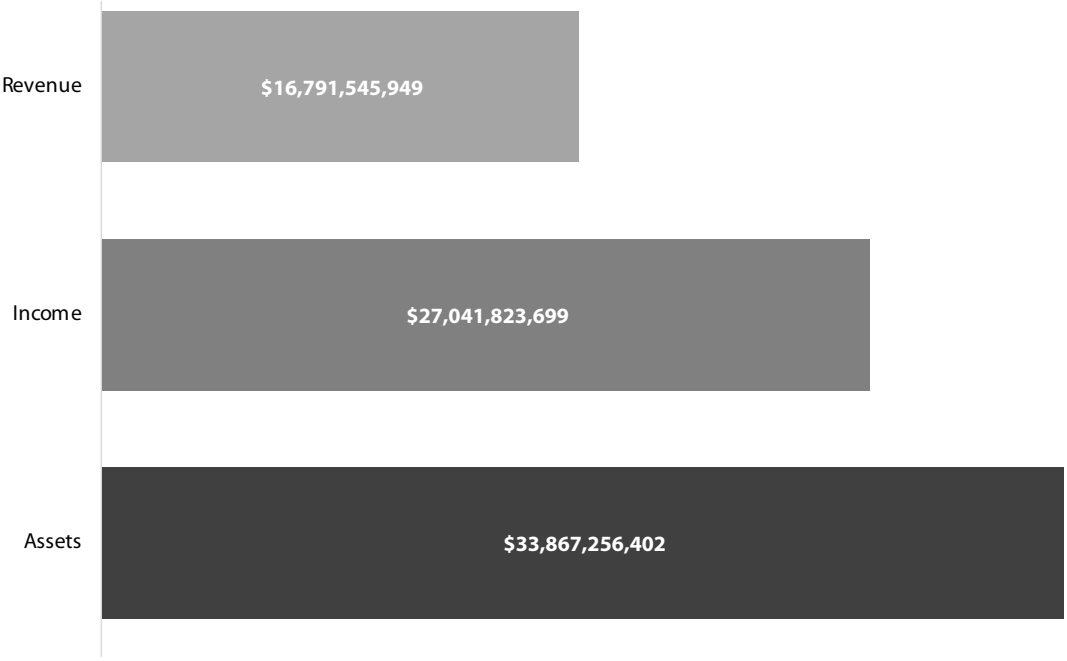
14 "Paycheck Protection Program Data Up To 150k," *Small Business Administration*, August 8, 2020.
15 "Paycheck Protection Program Data 150k Plus," *Small Business Administration*, August 8, 2020.
16 "UServe Utah Nonprofit COVID-19 Relief Grants Data," *UServe Utah and Utah Nonprofits Association*, November 2020.
17 "Create in Utah Grants Data," *Utah Department of Heritage and Arts,* November 20, 2020.
18 "COVID Relief Grants and Loans Data for Nonprofits," *Governor's Office of Economic Development,* November 2020.
19 Give.org, "Donor Trust Report 2020: Trust and Giving During the COVID-19 Outbreak," *BBB Wise Giving Alliance*.
20 Jasen Lee, "Despite 'Mind Blowing' Jobless Claims, Utah Economy Still Strong, Economist Says," *Deseret News*, November 12, 2020, final edition.
21 Ben Geler, "Places Where Americans Give the Most to Charity–2020 Edition," *SmartAsset*, November 17, 2020.

Figure 23.1: Number of Utah Tax Exempt Nonprofit Organizations



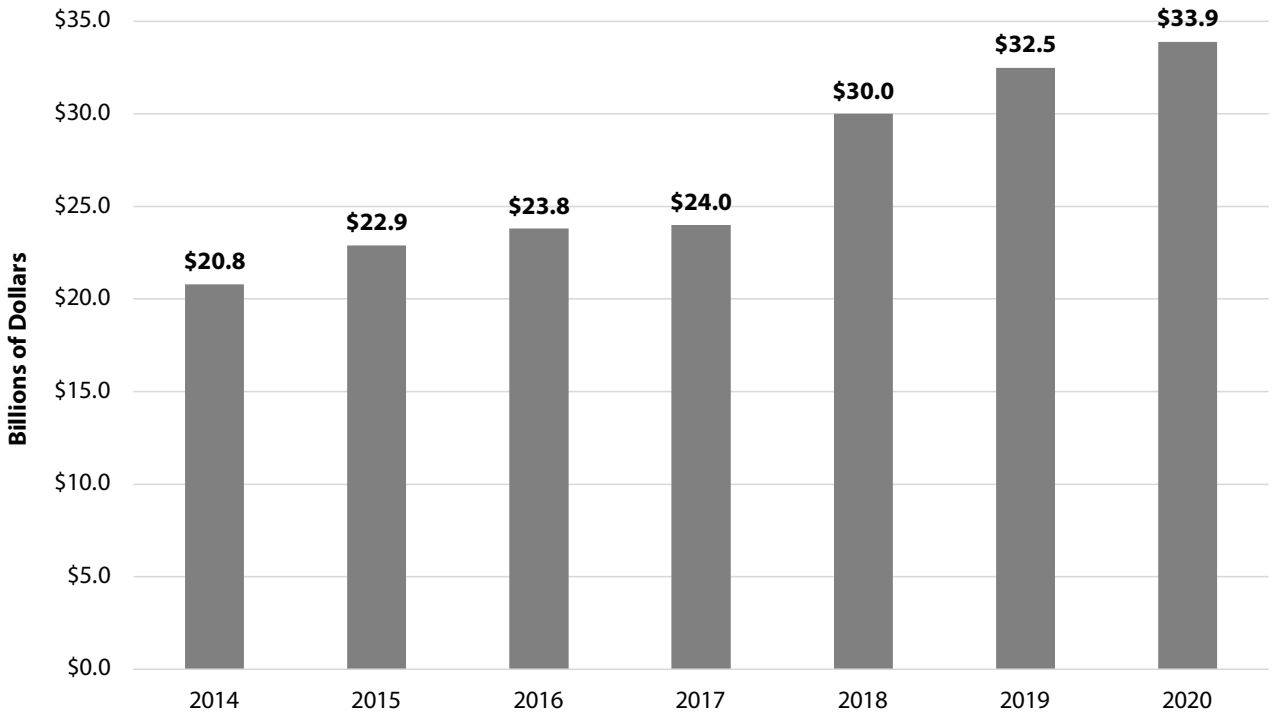
Sources: Internal Revenue Service, (October 2020, October 2019, October 2018, July 2017, November 2016, December 2015, December 2014) Exempt Organizations Business Master File

Figure 23.2: Utah's Nonprofit Sector by Combined Revenue, Income, and Assets



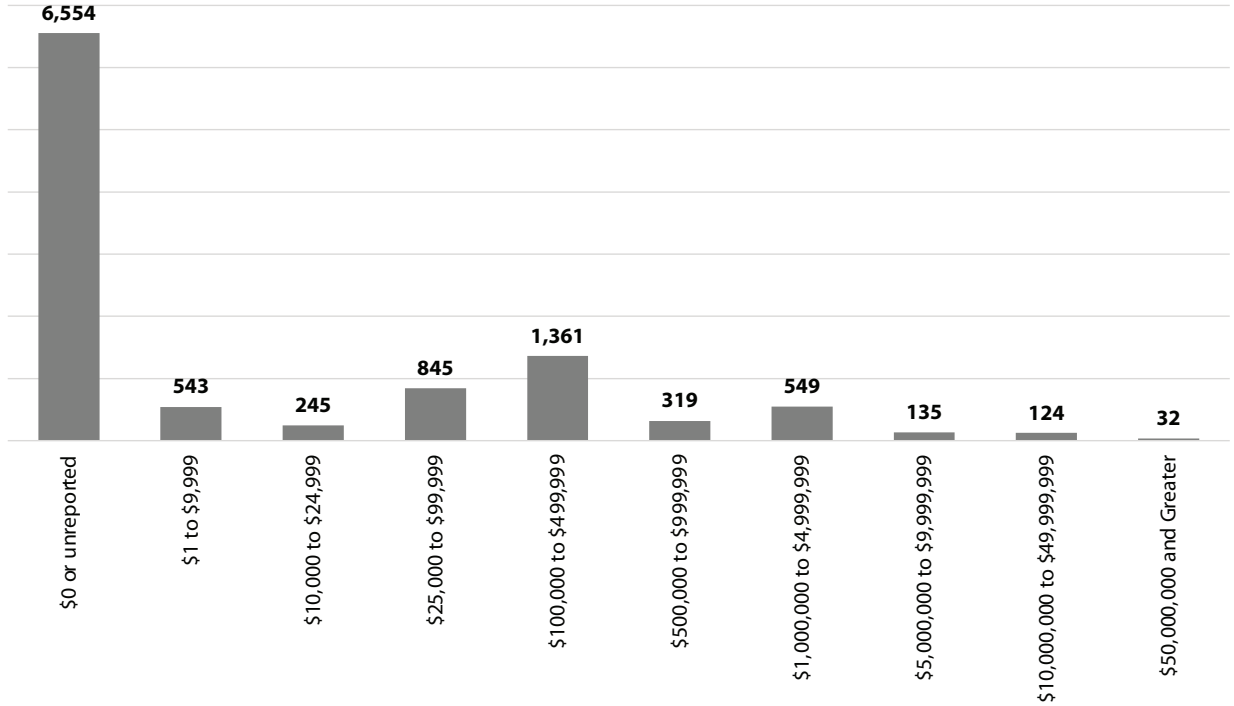
Sources: Internal Revenue Service, (October 2020) Exempt Organizations Business Master File

Figure 23.3: Utah Tax Exempt Nonprofit Organization Assets



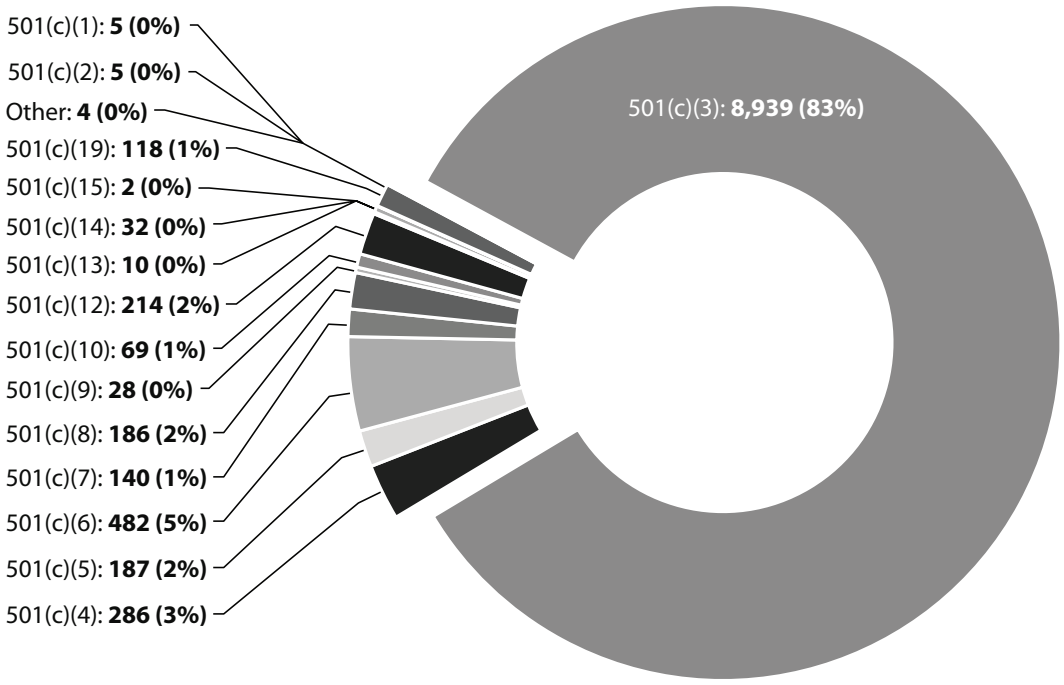
Sources: Internal Revenue Service, (October 2020, October 2019, October 2018, July 2017, November 2016, December 2015, December 2014) Exempt Organizations Business Master File

Figure 23.4: Utah's Nonprofit Sector by Income Group



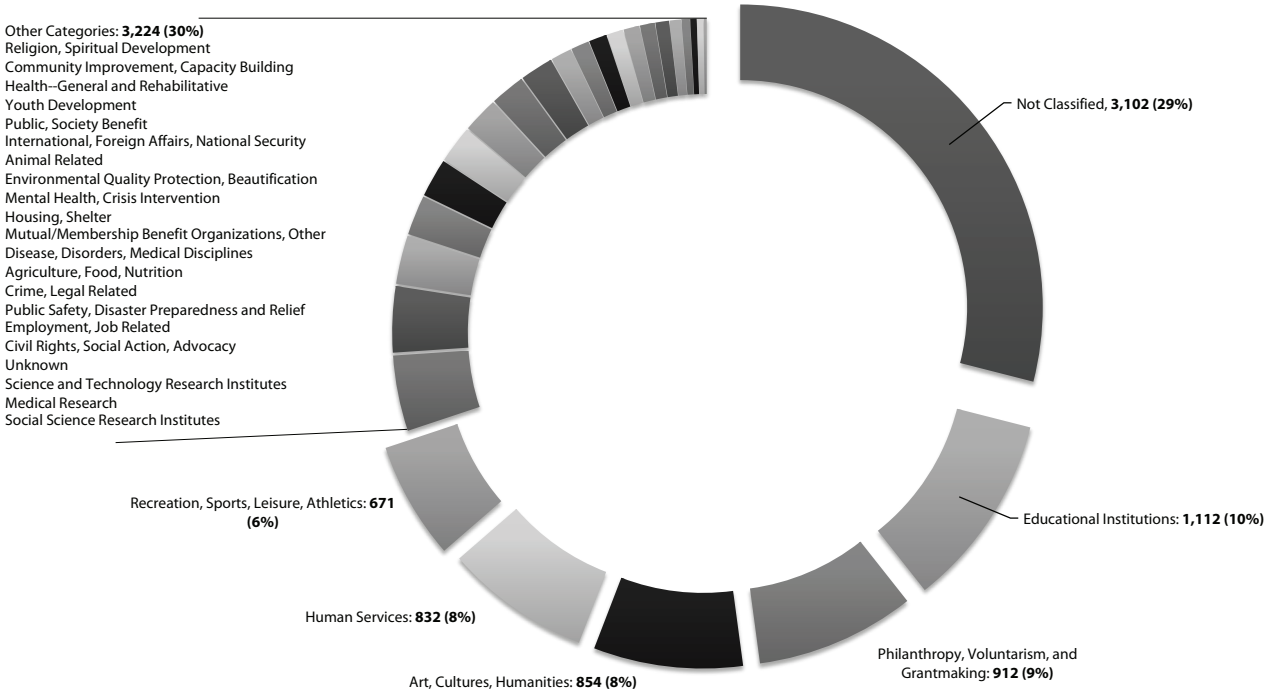
Sources: Internal Revenue Service, (October 2020) Exempt Organizations Business Master File

Figure 23.5: Utah's Nonprofit Sector by IRS Subsection Designation



Sources: Internal Revenue Service, (October 2020) Exempt Organizations Business Master File

Figure 23.6: Utah's Nonprofit Sector by NTEE Codes



Sources: Internal Revenue Service, (October 2020) Exempt Organizations Business Master File

Table 23.1: Loans and Grants Given Primarily to Nonprofits Thus Far, During the COVID-19 Pandemic

	PPP Loans Under $150,000	**PPP Loans Over $150,000**	**UServe Utah**	**Utah Department of Heritage and Arts** (as of Nov 2020)	**Governor's Office of Economic Development**
Number of Loans or Grants Given	550	206	20	709	77 (rural counties) 158 (urban counties)
Total Dollar Amount Given	$23,150,001	(Data Unavailable)	$92,215	$18,193,900	$4,504,154

Source: U.S. Small Business Administration, (November 2020) Paycheck Protection Program Data Files; UServe Utah, (November 2020) Nonprofit Grant Program Total; Utah Department of Heritage and Arts, (November 2020) latest numbers on grants given to arts organizations and artists; Governor's Office of Economic Development, (November 2020) latest numbers on grants and loans given to nonprofits in rural and urban counties