

UTAH INFORMED

VISUAL INTELLIGENCE FOR 2020

Kem C. Gardner Policy Institute

DAVID ECCLES SCHOOL OF BUSINESS | UNIVERSITY OF UTAH

In Partnership with the Salt Lake Chamber

KEM C. GARDNER POLICY INSTITUTE

We are an honest broker of
INFORMED
RESEARCH

that guides
INFORMED
DISCUSSIONS

and leads to
INFORMED
DECISIONS™

January 2020

Twenty twenty...it has a nice ring to it in more ways than one. We measure visual acuity with the numbers 20/20. People with 20/20 vision see with clarity and sharpness. The year 2020 also marks the start of a new decade. It's a time to begin anew. Some even think of 2020 as a combination of the past and future. William Shakespeare said, "What's past is prologue." Decision makers are advantaged when they understand the past 20 years as they plan for the next 20 years.

It is in the spirit of seeing more clearly, starting a new decade, and preparing for the future that we share this fifth edition of Utah Informed. In it, we provide relevant and interesting information to help you make INFORMED DECISIONS™ in the coming year.

For example, did you know...

- Utah's expansion in jobs since the 2009 recession outpaces all other states.
- The state of Utah "rainy-day funds" tallied a record \$772 million in 2019.
- Utah youth vaping rates exceed adult vaping rates and smoking rates for all ages.

- Global social media followers of the Chinese microblogging website Sina Weibo number more than twice the Jazz's Twitter followers.
- The percentage of Utah 8th graders proficient in math and who do not qualify for the school lunch program is nearly two-and-a-half times greater than those who do qualify.

The Kem C. Gardner Policy Institute serves as an honest broker of informed research, that guides informed discussions, and leads to INFORMED DECISIONS™.

We hope Utah Informed will help you make wise decisions in 2020.

Thanks for your interest,



Natalie Gochmour
Director, Kem C. Gardner Policy Institute



Taylor Randall
Dean, David Eccles School of Business



Derek Miller
President & CEO, Salt Lake Chamber

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Words and phrases to know in 2020

- **apex** – the uppermost point: *Has the economic expansion reached an **apex**?*
- **canceling** – an informal boycott of someone or something in the public eye: *Is it time to cancel **canceling**?*
- **cathedral thinking** – the careful planning and undertaking of long-term pursuits that will benefit future generations, based on the generation-spanning design and construction of cathedrals in medieval times: *Ensuring the long-term prosperity of rural Utah requires **cathedral thinking**.*
- **constitutional amendment** – a change in a government's constitution: *In Utah, a legislatively referred **constitutional amendment** requires that two-thirds of the legislature vote to place the proposed amendment before voters in the next general election and a vote of yea by the majority of citizens participating in the election.*
- **ecosystem** – in business, an economic community of interconnected individuals, organizations, and resources that share, grow, and transform together: *A sustainable tech **ecosystem** requires talent, infrastructure, capital, legal infrastructure, and supportive public policy.*
- **manaakitanga** – a Maori word meaning hospitality, kindness, generosity, support – and the process of showing respect and care for others: *Salt Lake City in 2030 will be a place of **manaakitanga**.*
- **microtransit** – a form of Demand Responsive Transit (DRT) that provides flexible routing and scheduling of minibus vehicles: *The Utah Transit Authority is currently piloting a **microtransit** service in southwest Salt Lake County.*
- **POWDER (Platform for Open Wireless Data-driven Experimental Research)** – a platform for experimenting on the future of wireless networking in a city-scale “living laboratory,” run by the University of Utah in partnership with Salt Lake City and the Utah Education and Telehealth Network: *The FCC has authorized city-scale testbeds for advanced wireless communications and network research, including 5G, in Salt Lake City and New York City; the Salt Lake test site will support the **POWDER** platform, covering the University Campus, downtown Salt Lake City, and the corridor between.*
- **prebate** – a preemptive rebate of tax credits and exemptions prior to the filing of taxes: *Recent Utah tax reforms include **prebates** for lower income taxpayers to offset the increase in the sales tax on food and for the new dependent exemption.*
- **user fee** – a fee charged to those who choose to use a government service to cover the costs of providing the service: *Many economists believe that charging **user fees** for certain public services can result in a more fair and efficient allocation of resources.*
- **white space** – dedicated time to pause, reflect, and recharge: *Making room for **white space** can fuel innovation and productivity. Like white space in design rests our eye, white space in our brain rests our mind.*

Discoveries in 2019

- **First image of a black hole** — The Event Horizon Telescope team published the first-ever image of a black hole, confirming that the name is indeed accurate.
- **Ice sheets disappearing** — A study released in April showed that the Greenland and Antarctica ice sheets are disintegrating even faster than before, losing ice at rates of 286 billion and 252 billion tons a year, respectively. This is more than five times the rate of just a few decades ago.
- **Bird populations in decline** — In the last 50 years, bird populations in North America have decreased by almost 3 billion, or 29%. This is likely due to habitat loss, pesticides, and other human factors.
- **Lost continent of Adria** — Formerly part of the supercontinent Pangea, the lost continent of Greater Adria was found under what is now southern Europe.
- **20 new moons for Saturn** — Saturn now holds the title for the most moons in the solar system. Astronomers discovered 20 more, bringing the total to 82.
- **New human species** — An ancient species of human was discovered in the Philippines, known as *Homo luzonensis*.
- **Google claims “Quantum Supremacy”** — Google announced they have passed a major milestone in quantum computing, completing a complex calculation in 200 seconds, a feat that would take normal supercomputers thousands of years. The new quantum computer is 1.5 trillion times faster.
- **New Horizons discovers mysterious object** — The New Horizons spacecraft sent back photographs of an oddly shaped object in the outer solar system, now named “Arrokoth.” Arrokoth is the size of a mountain and flat as a pancake.

Signs of our times

Top Google searches in the United States in 2019

All Searches

1. Disney Plus
2. Cameron Boyce
3. Nipsey Hussle
4. Hurricane Dorian
5. Antonio Brown
6. Luke Perry
7. Avengers: Endgame
8. Game of Thrones
9. iPhone 11
10. Jussie Smollett

News

1. Hurricane Dorian
2. Notre Dame Cathedral
3. Women's World Cup
4. Area 51 raid
5. Copa America
6. El Paso shooting
7. Sri Lanka
8. Government shutdown
9. Equifax data breach settlement
10. California earthquake

People

1. Antonio Brown
2. Jussie Smollett
3. James Charles
4. Kevin Hart
5. R. Kelly
6. 21 Savage
7. Lori Loughlin
8. Jordyn Woods
9. Bryce Harper
10. Robert Kraft

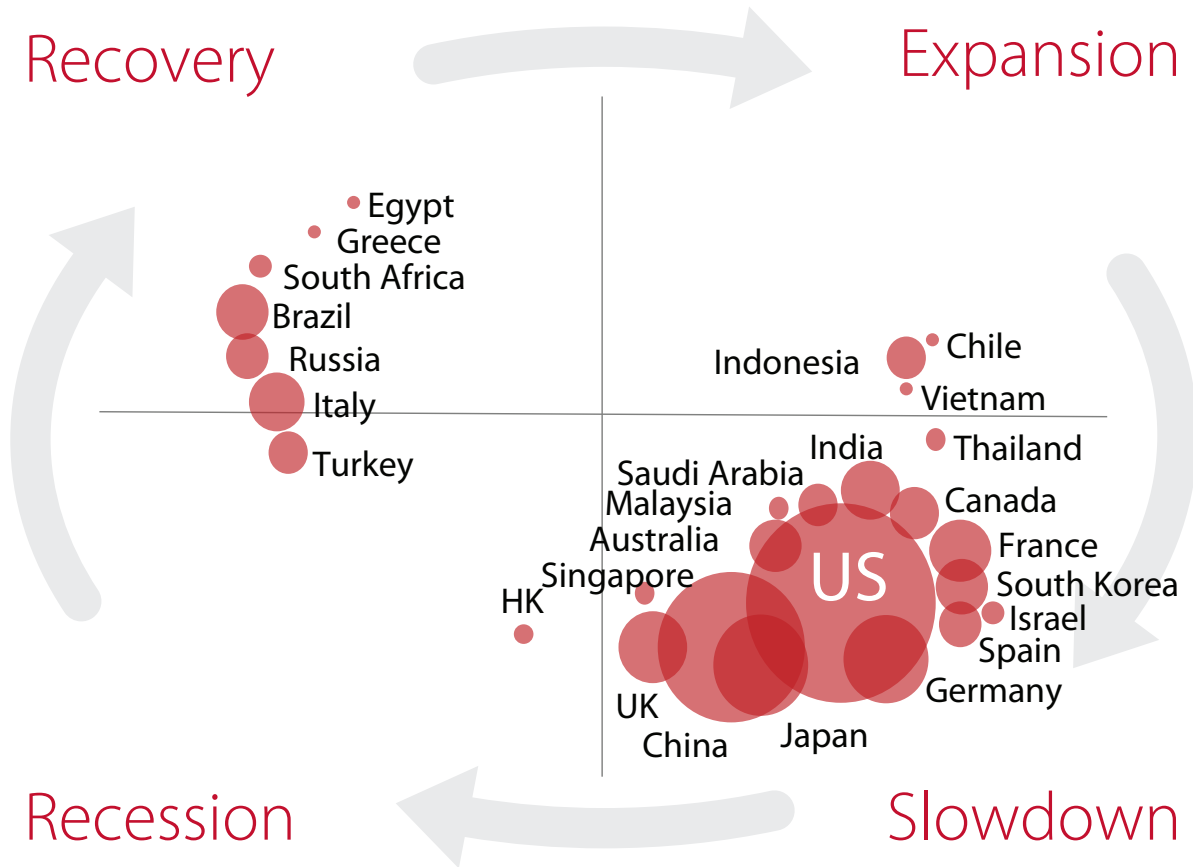
What is...?

1. What is Area 51
2. What is a VSCO girl
3. What is momo
4. What is a boomer
5. What is quid pro quo
6. What is camp fashion
7. What is Disney Plus
8. What is Bird Box about
9. What is a Mandalorian
10. What is Brexit

Source: Google

Slowing global economy

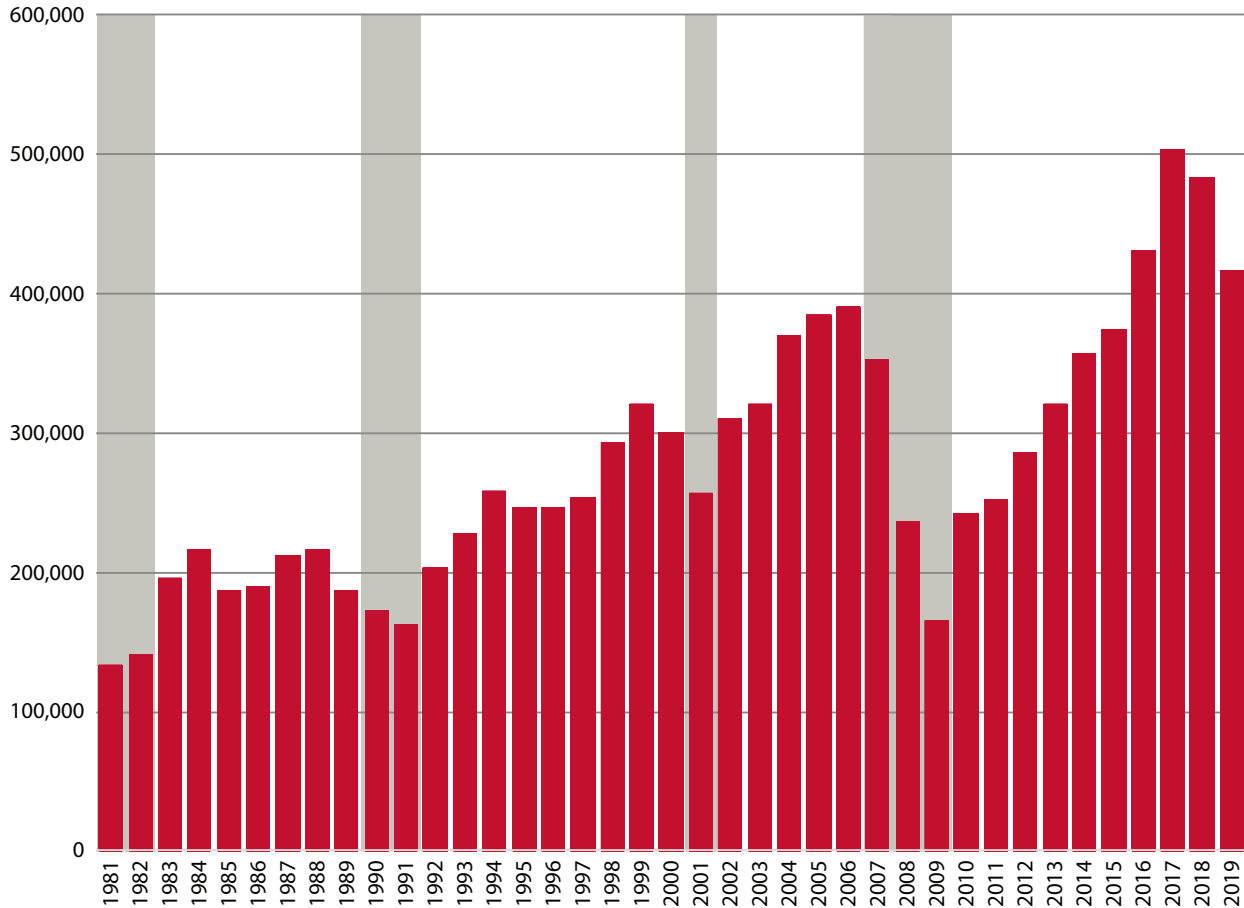
Moody's Analytics: status of global economies, end of 2019



Note: Circle size correlates with real GDP.
Source: Moody's Analytics

An alternative to tea leaves?

Recreational vehicle shipments



Notes: Grey bars indicate recessions. 2019 is a forecast by the source.
Source: Recreational Vehicle Industry Association

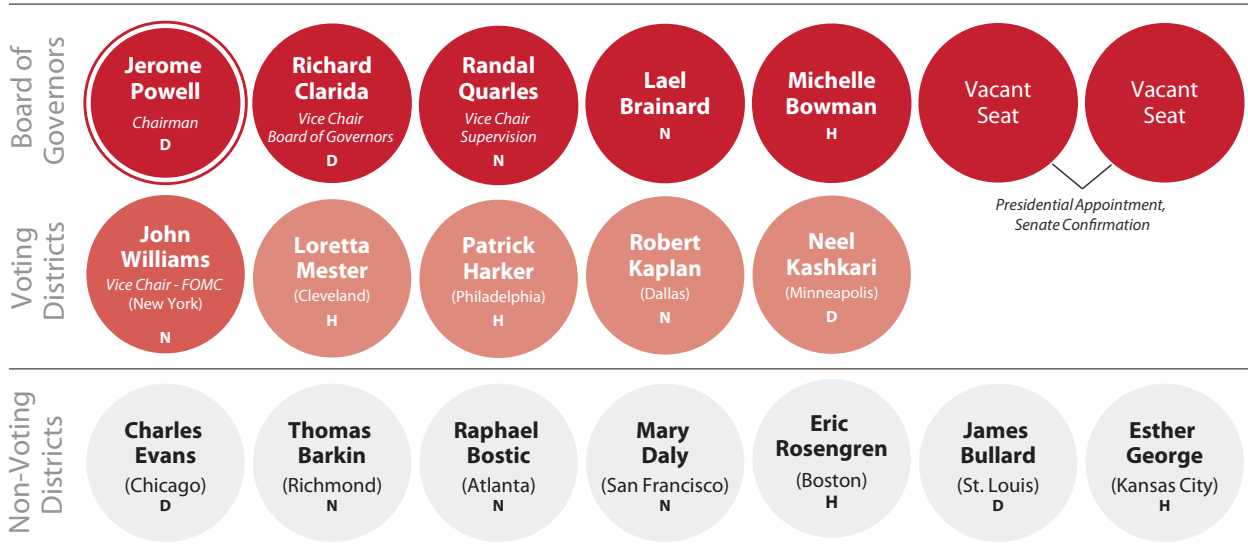
FOMC 101

Organization of the Federal Open Market Committee

The Federal Open Market Committee is composed of 12 members:

7 members of the Board of Governors + the New York Fed President + 4 rotating District Presidents

- **Chairman**
Serving a renewable 4-year term ending on February 4, 2022
- **Board of Governors**
Permanent voting seat
- **New York Fed President**
Vice Chair of FOMC, Permanent voting seat
- **Voting Districts**
Four voting regional presidents
- **Non-Voting Districts**
Seven non-voting regional presidents



POLICY INCLINATION:

Designated by Bloomberg LP as of December 2019

- H** = Hawk
- N** = Neutral
- D** = Dove

FEDERAL RESERVE VOTING DISTRICTS ROTATION:

2020	2021	2022
New York	New York	New York
Cleveland	Chicago	Cleveland
Philadelphia	Richmond	Boston
Dallas	Atlanta	St. Louis
Minneapolis	San Francisco	Kansas City

FOMC MEETING:

January 28-29, 2020	July 28-29, 2020
March 17-18, 2020	September 15-16, 2020
April 28-20, 2020	October 04-05, 2020
June 09-10, 2020	December 15-16, 2020

Note: The Salt Lake City Fed branch is part of the San Francisco district.
Source: Bloomberg LP, Federal Reserve Board and Wells Fargo Securities

“The big question that I’ve been wrestling with the last nine months is: what’s going to win, the data or the mood?”

Mary Daly, President

Federal Reserve Bank of San Francisco



Percent of adults who have used a ride-hailing service like Uber or Lyft

	2015	2018	Change
U.S. adults	15	36	+21

Age

18-29	28	51	+23
30-49	19	43	+24
50+	7	24	+17

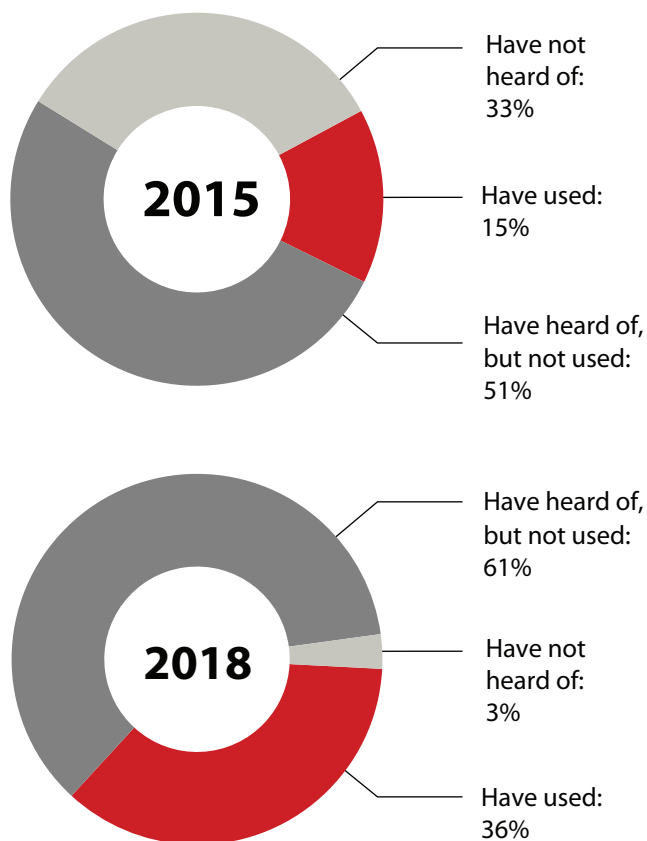
Education

HS or less	6	20	+14
Some college	15	36	+21
College grad +	29	55	+26

Household Income

Less than \$30k	10	24	+14
\$30k-\$74.9k	13	35	+22
\$75k or more	26	53	+27

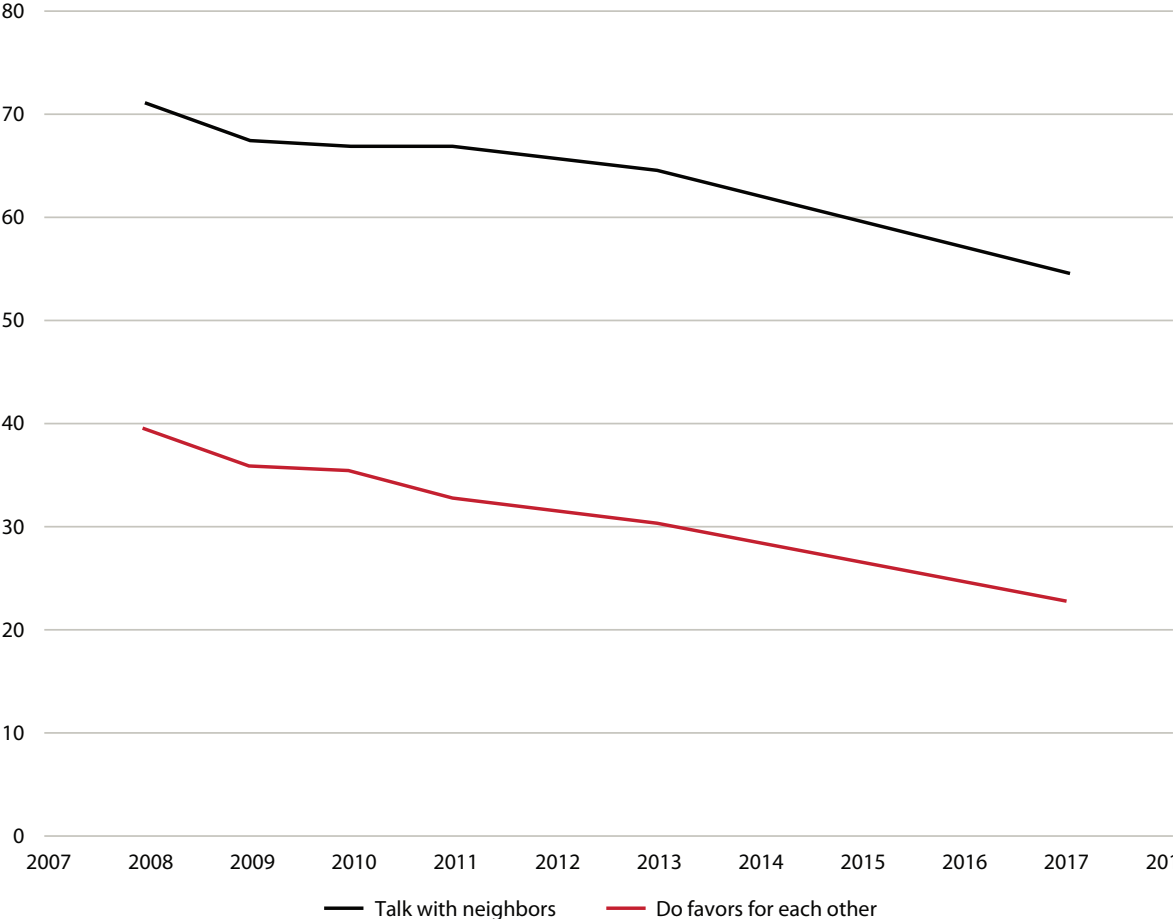
Awareness and usage of ride-hailing services like Uber or Lyft



Source: Pew Research Center Fact Tank

Please, won't you be my neighbor?

Percent of US adults who have informal interactions with neighbors a few times a month or more



Note: Trend lines interpolate across years with no data (2012, 2014-2016). The estimates potentially reflect survey changes that affect their comparability over time.
Source: United States Congress Joint Economic Committee Social Capital Project analysis of CPS Civic Engagement Supplement, 2008-2011 and 2013; CPS Volunteer & Civic Life Assessment, 2017

Save the date



Key Utah 2020 Election Dates

January 2	First day to declare intent to gather signatures to get on the primary ballot in Utah
February 3	Iowa Caucuses
March 3	Utah's inaugural Super Tuesday
March 13	First day to declare official candidacy for Utah office
March 19	Last day to declare intent to gather signatures; last day to declare official candidacy in Utah*
Late March/Mid April	Utah county conventions
April 25	State conventions
April 27	Last day to declare candidacy for Lieutenant Governor
June 1	Last day to register to vote by mail for the Primary Election
June 9	Ballots sent to voters for Primary Election
June 23	Last day for in-person or online voter registration for Utah Primary Election (cannot vote early)
June 30	Utah Primary Election
October 5	Last day to register to vote through the mail
October 7	Vice presidential debate at the University of Utah
October 13	First day General Election ballots may be sent by mail
October 20	General Election in-person early voting begins
October 27	Last day for in-person or online voter registration for General Election (cannot vote early)
November 3	General Election
November 17	Final General Election results certified by county clerks

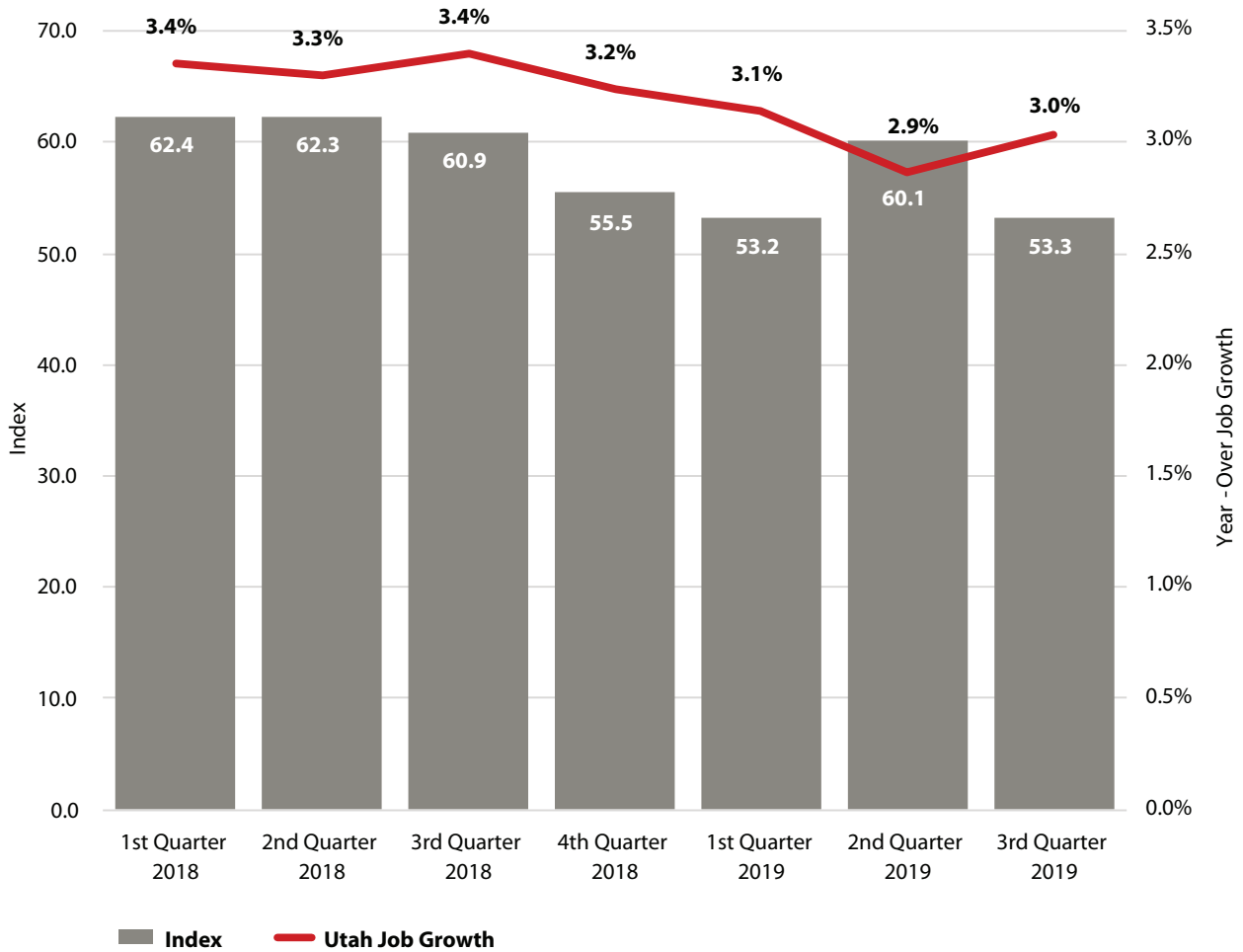
*2 weeks prior to state conventions: last day to submit petition signatures

Note: This is not an official calendar. Refer to <https://voteinfo.utah.gov/> for an official, current schedule.

Sources: Utah Office of the Lieutenant Governor; Utah Democratic Party; Utah Republican Party

CEOs know best

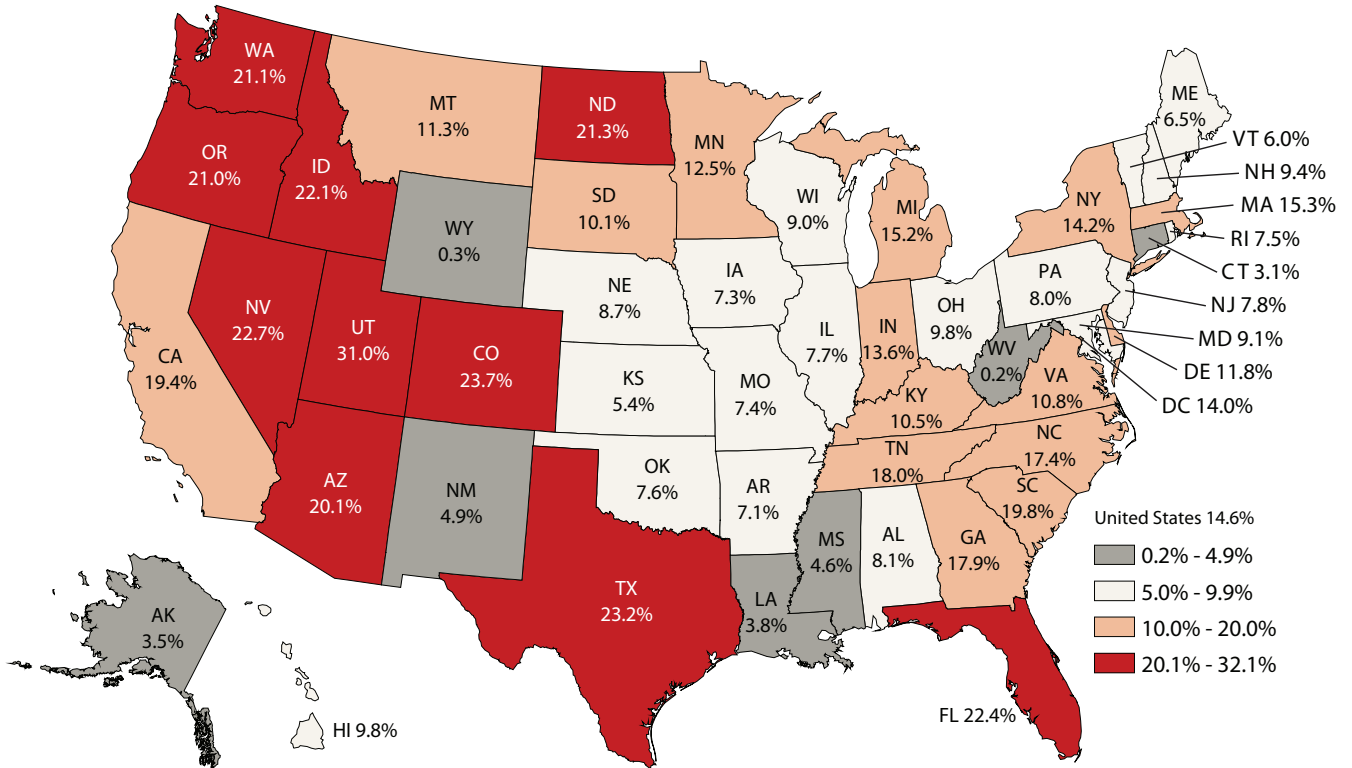
Salt Lake Chamber CEO Outlook Confidence Index and job growth



Note: An index score below 50 indicates executives believe the economy will worsen; a score above 50 indicates a belief among executives that the economy will improve.
 Source: Salt Lake Chamber's CEO Outlook with support from the Kem C. Gardner Policy Institute, including analysis of the U.S. Bureau of Labor Statistics seasonally adjusted series of current employment statistics

Utah's economic expansion strongest in the nation

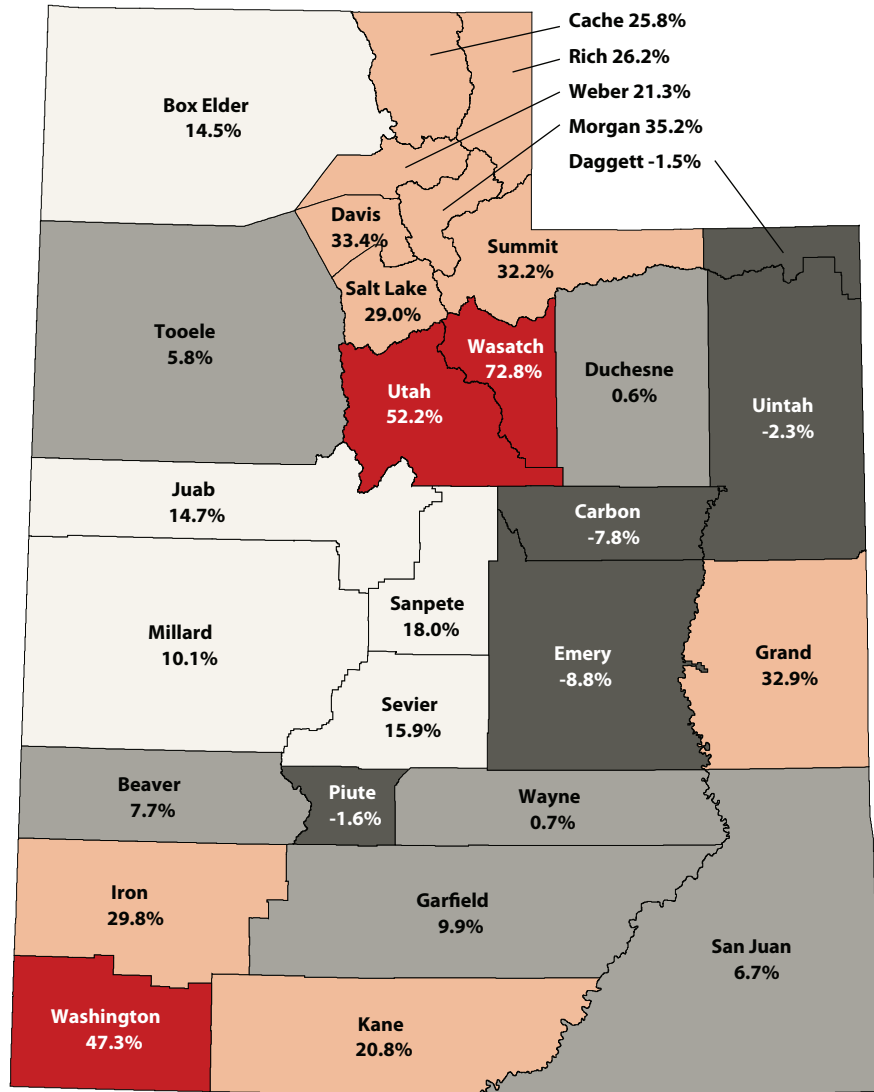
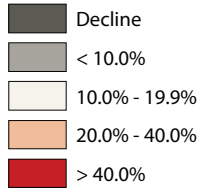
Change in employment since 2009 recession trough, Q2 2009 - Q2 2019



Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics data

The tale of two Utahs

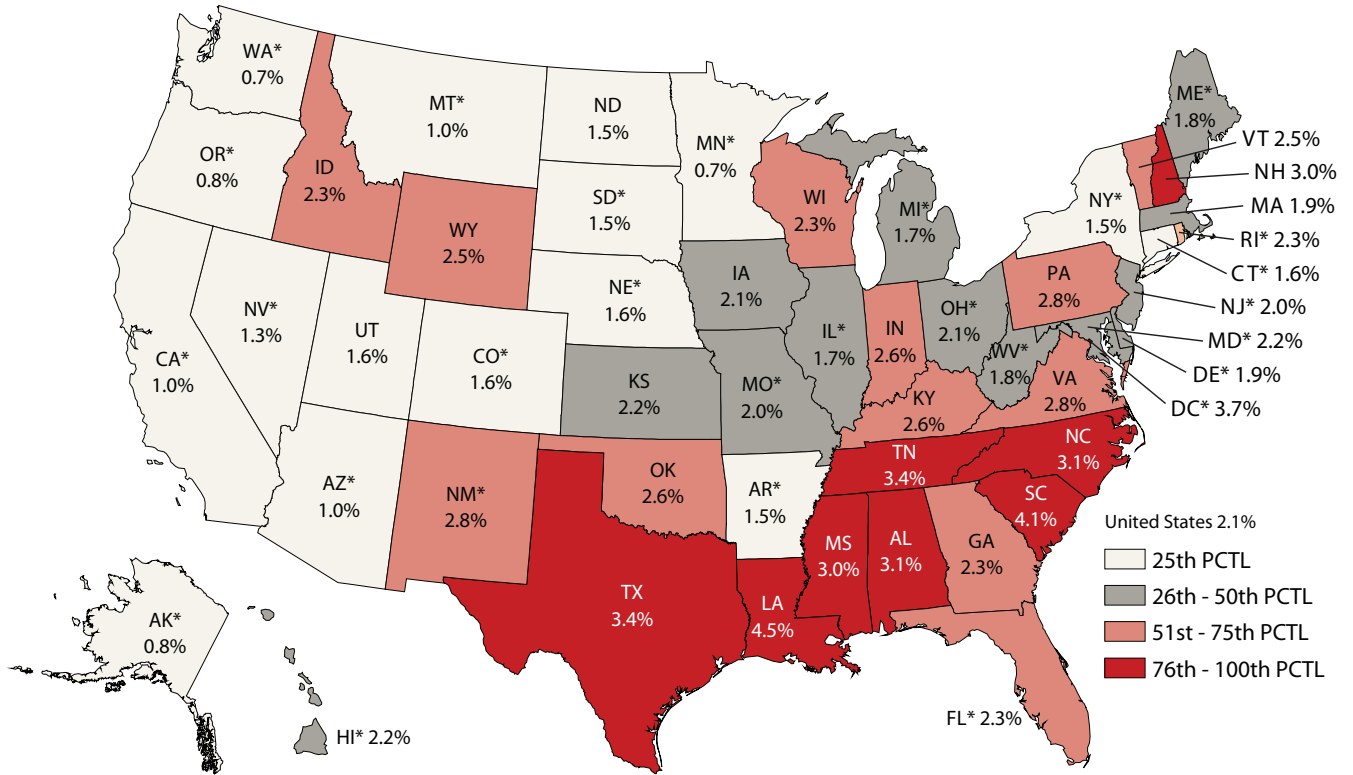
Change in Utah employment since 2009 recession trough, Q2 2009 - Q2 2019



Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics data

Looking under the hood of minimum wage laws

Percent of workers paid hourly rates with earnings below prevailing federal minimum wage
Aged 16 and over, 2018



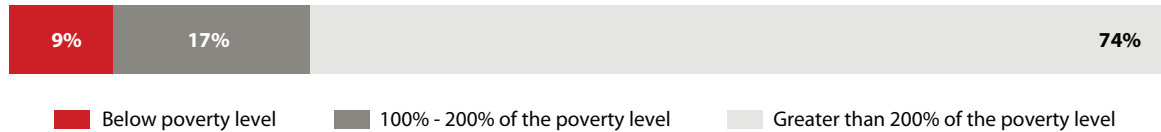
*Minimum wage higher than federal minimum wage in 2018
Sources: U.S. Bureau of Labor Statistics and U.S. Department of Labor

26% of Utahns at or below 200% FPL

Federal poverty thresholds and percent of Utahns by poverty status

		Percent of Poverty Level					
		100%	125%	138%	150%	175%	200%
Household/ Family Size	1	\$12,490	\$15,613	\$17,236	\$18,735	\$21,858	\$24,980
	2	\$16,910	\$21,138	\$23,336	\$25,365	\$29,593	\$33,820
	3	\$21,330	\$26,663	\$29,435	\$31,995	\$37,328	\$42,660
	4	\$25,750	\$32,188	\$35,535	\$38,625	\$45,063	\$51,500
	5	\$30,170	\$37,713	\$41,635	\$45,255	\$52,798	\$60,340
	6	\$34,590	\$43,238	\$47,734	\$51,885	\$60,533	\$69,180
	7	\$39,010	\$48,763	\$53,834	\$58,515	\$68,268	\$78,020
	8	\$43,430	\$54,288	\$59,933	\$65,145	\$76,003	\$86,860
	9	\$47,850	\$59,813	\$66,033	\$71,775	\$83,738	\$95,700
	10	\$52,270	\$65,338	\$72,133	\$78,405	\$91,473	\$104,540

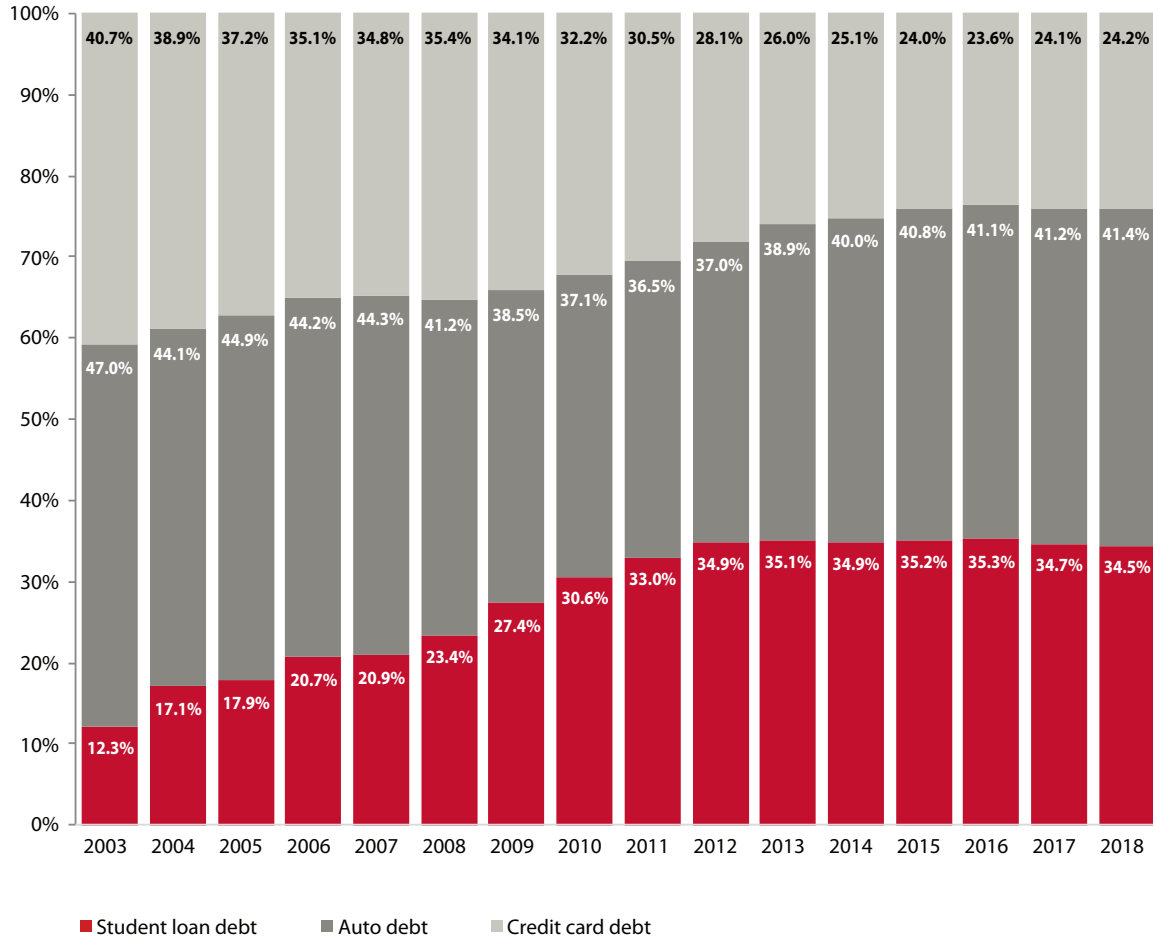
Add \$4,420 for each additional person to derive 100% level



Note: Thresholds are for 2019; poverty status estimates are for 2017.
Sources: Kaiser Family Foundation and U.S. Department of Health & Human Services

Student loans up postrecession

Distribution of non-mortgage household debt in Utah



Source: Kem C. Gardner Policy Institute analysis of Federal Reserve Bank of New York State Level Household Debt Statistics

Provident living?

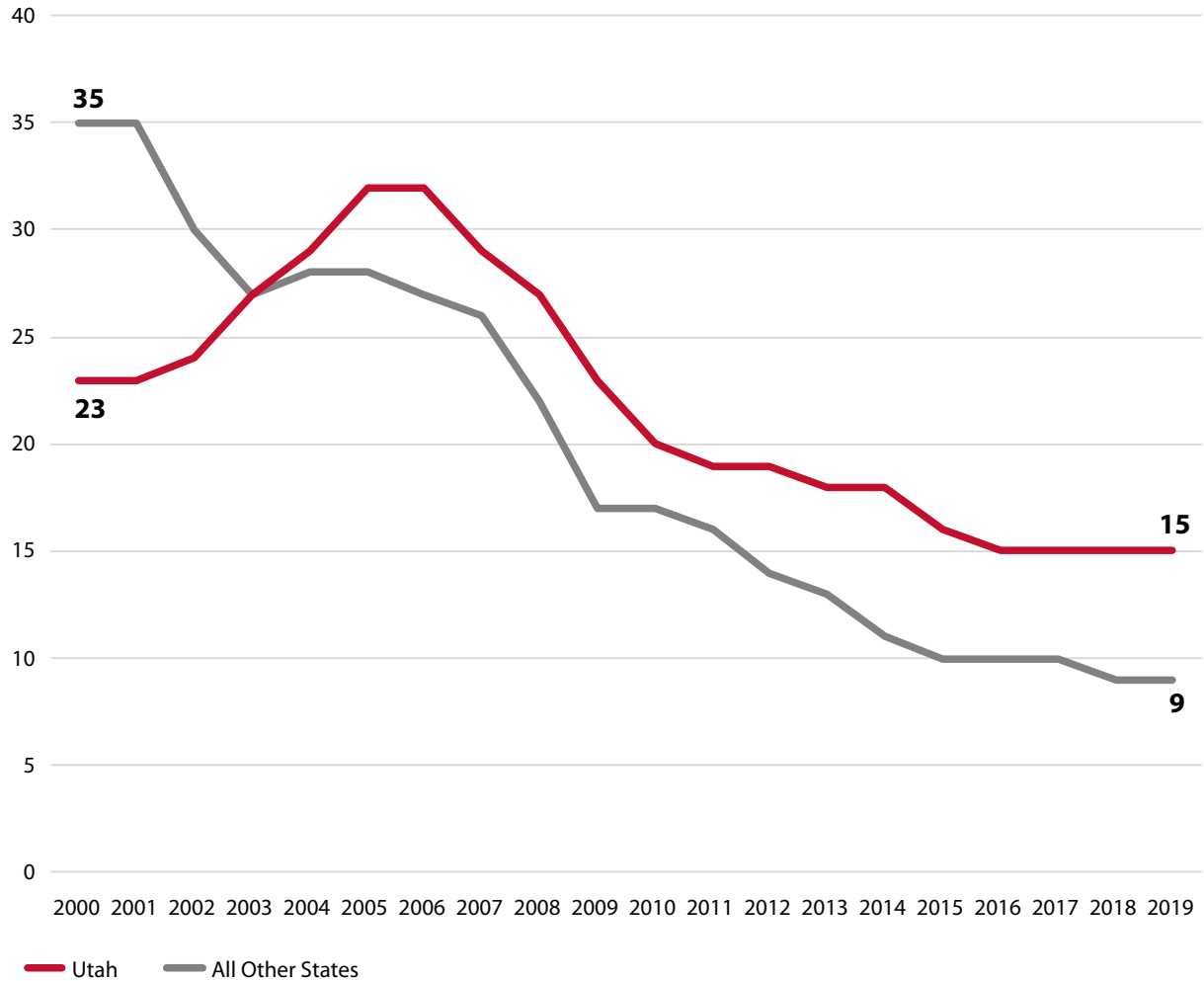
States with more than \$50,000 in household debt per capita in 2018

Metro Area	Debt per capita	% Change	
		1-year	10-year
District of Columbia	\$86,730	2.8%	13.5%
Hawaii	\$72,590	2.0%	5.8%
California	\$71,860	2.5%	-17.3%
Colorado	\$71,340	4.2%	3.6%
Maryland	\$71,120	1.6%	-3.2%
Virginia	\$65,480	0.7%	-2.2%
Washington	\$65,390	4.5%	-0.7%
Massachusetts	\$64,680	2.6%	4.0%
Connecticut	\$59,330	0.8%	-6.0%
Utah	\$59,320	4.2%	4.6%
New Jersey	\$58,590	1.3%	-7.9%
Alaska	\$58,550	1.2%	8.2%
New Hampshire	\$55,650	2.0%	-0.9%
Oregon	\$55,090	3.9%	1.6%
Delaware	\$54,200	1.5%	0.3%
Minnesota	\$54,190	1.7%	-3.1%
Arizona	\$53,060	3.4%	-19.4%
Nevada	\$52,770	4.9%	-28.4%

Notes: Household debt includes auto, credit card, mortgage, and student loans; per capita figures are based on adult population.
Source: Federal Reserve Bank of New York State Level Household Debt Statistics

More industrial banks in Utah than anywhere else

Industrial loan companies in the United States

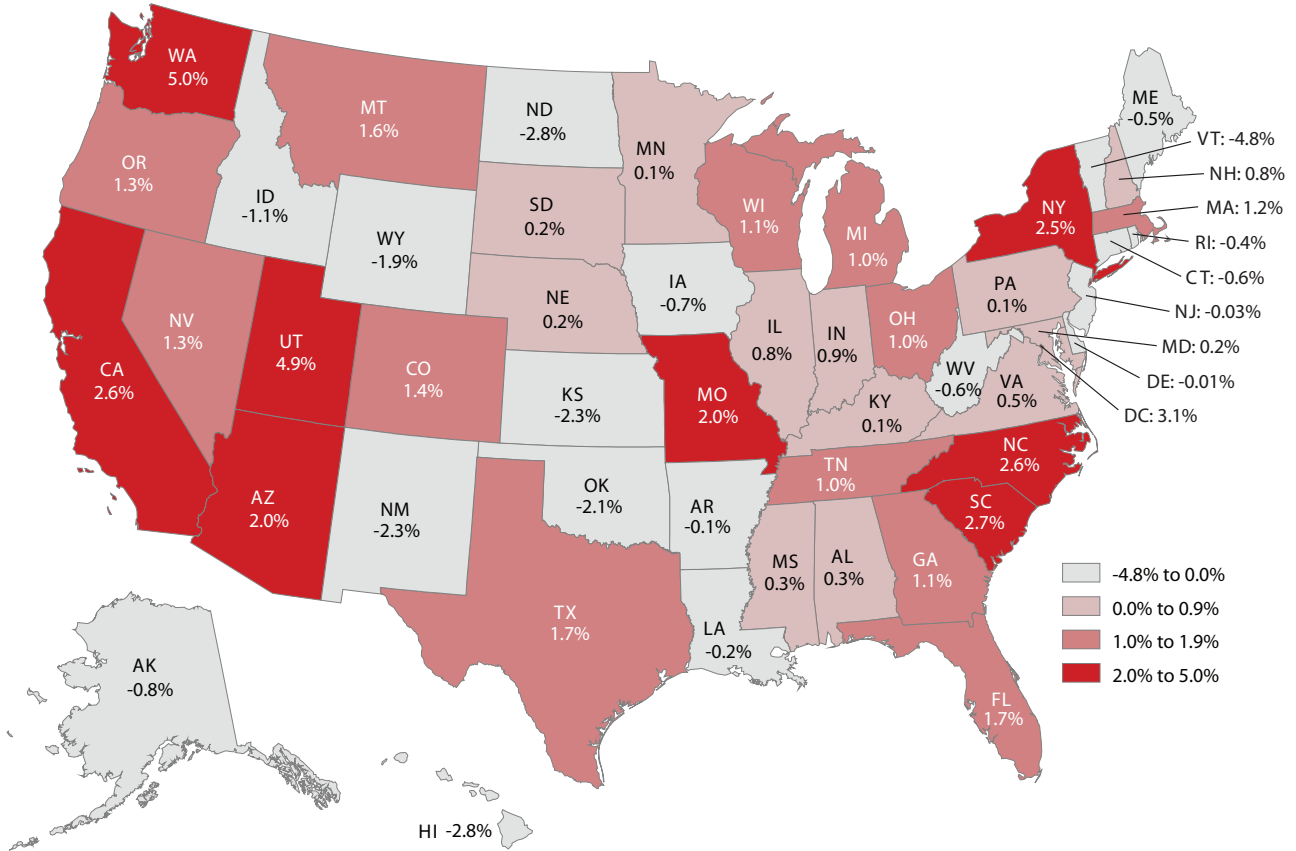


Sources: Federal Deposit Insurance Corporation (FDIC); IBISWorld; Utah Department of Financial Institutions

Look out Microsoft

Annual job growth/decline in the tech industry

2008-2018 average

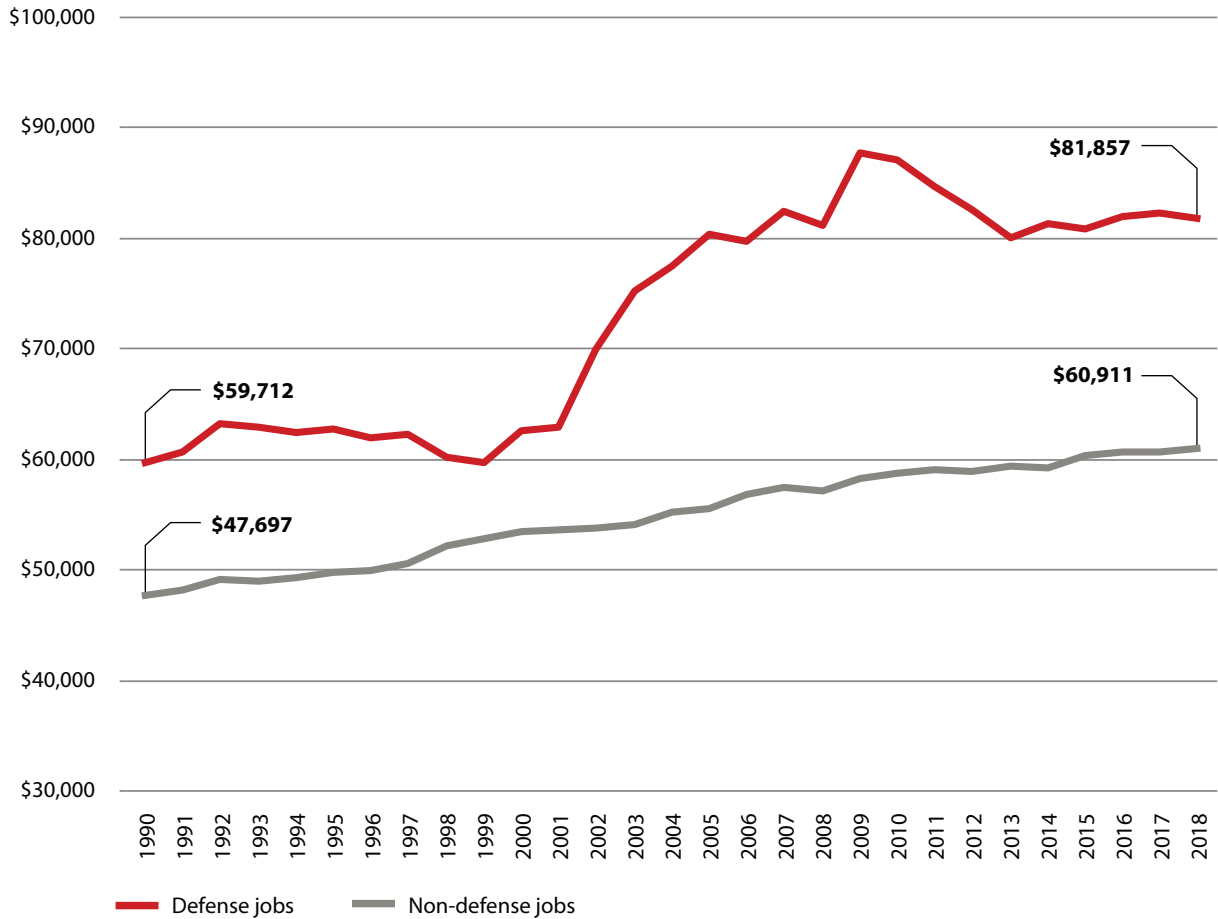


Source: U.S. Bureau of Labor Statistics

Be All That You Can Be

Average compensation per job in Utah's defense and non-defense industries

Constant 2018 dollars

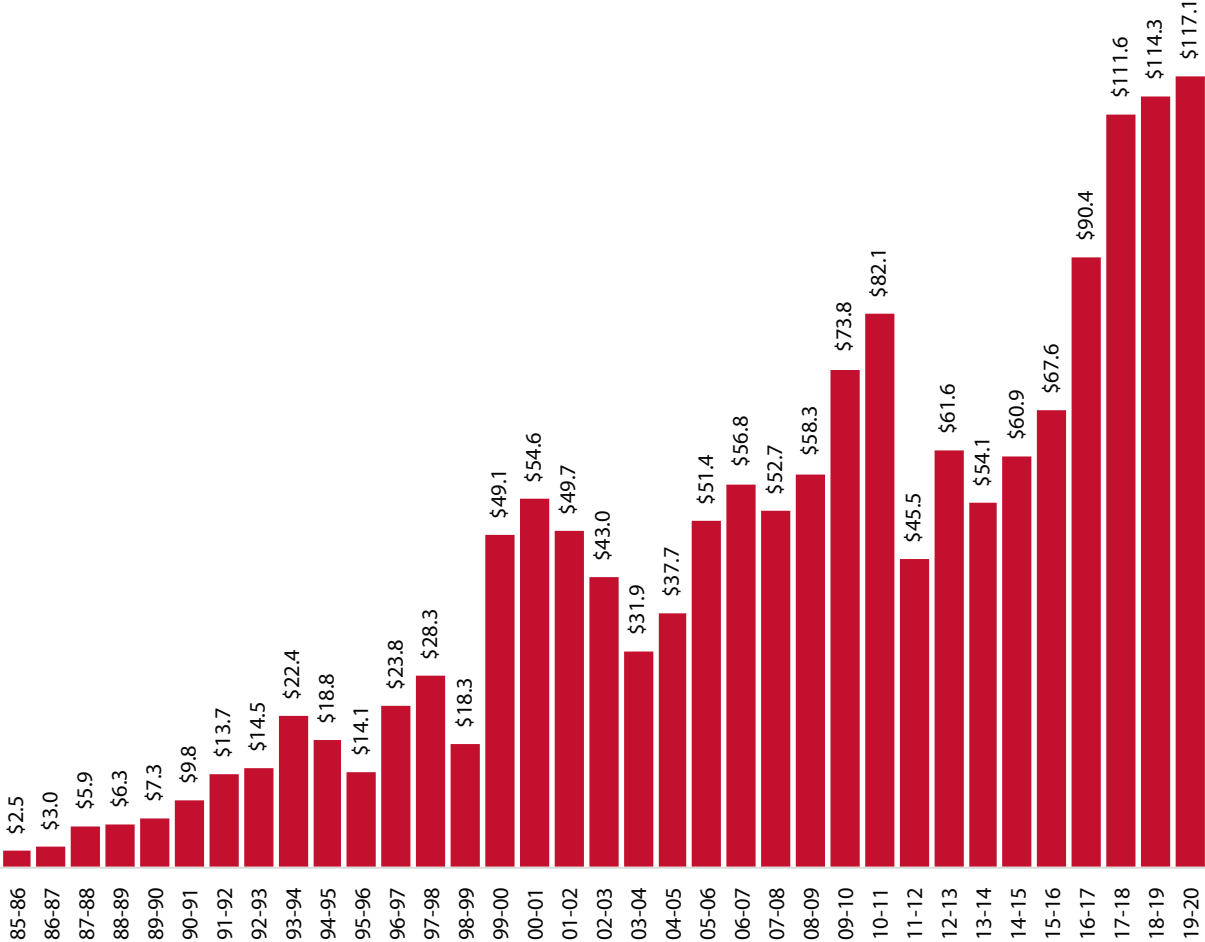


Notes: Compensation includes wages and salaries and employer-paid pension and government social insurance contributions. The defense industry encompasses military and federal civilian personnel.

Source: Kem C. Gardner Policy Institute analysis of U.S. Department of Commerce Bureau of Economic Analysis

Economic swish - over \$1.5 billion in Jazz salaries since 1985

Annual Utah Jazz player salaries
\$ millions

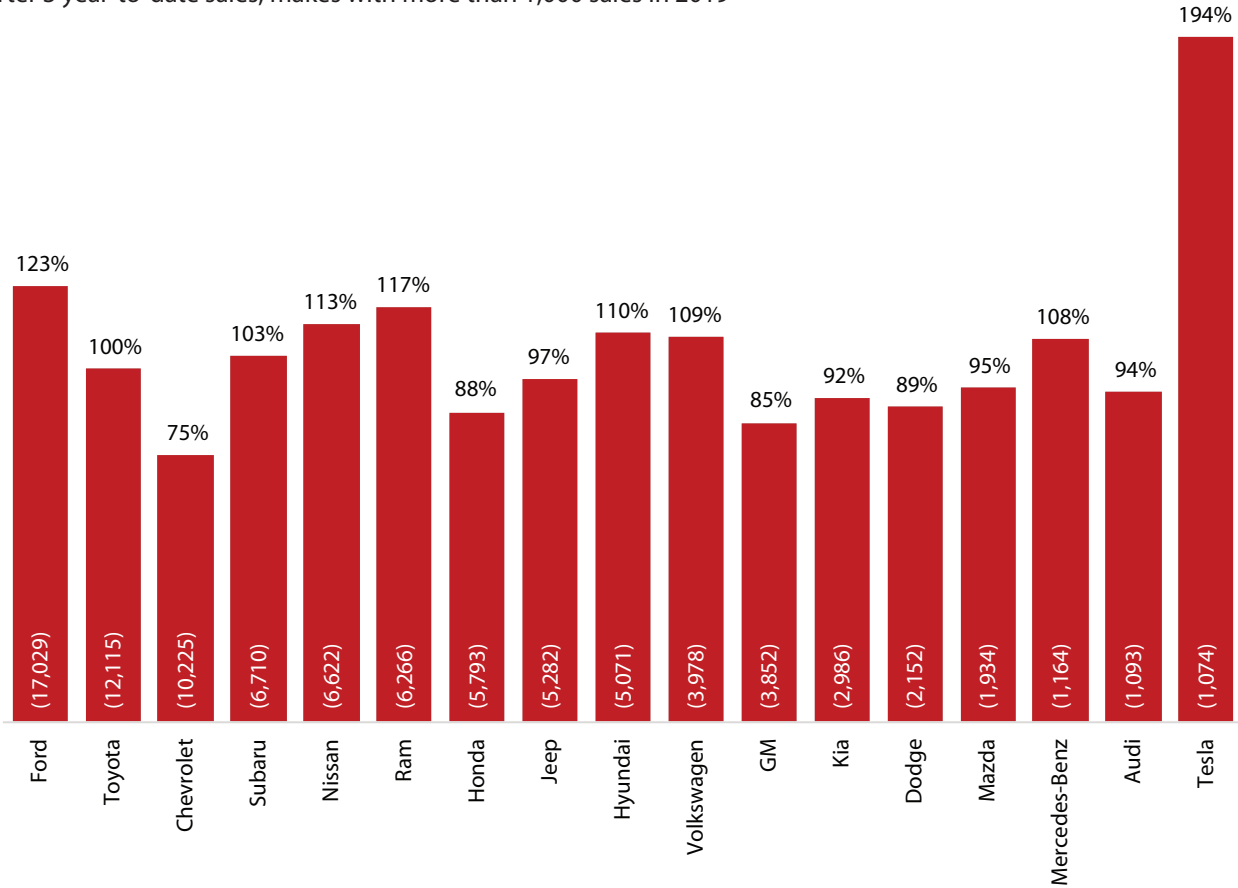


Source: Larry H. Miller Sports & Entertainment

Welcome to Utah, Elon

2019 car sales in Utah as a percent of 2018 sales for most popular makes

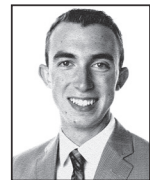
Quarter 3 year-to-date sales, makes with more than 1,000 sales in 2019



Note: 2019 sales through quarter three in parentheses.
Source: Kem C. Gardner Policy Institute analysis of Utah State Tax Commission data

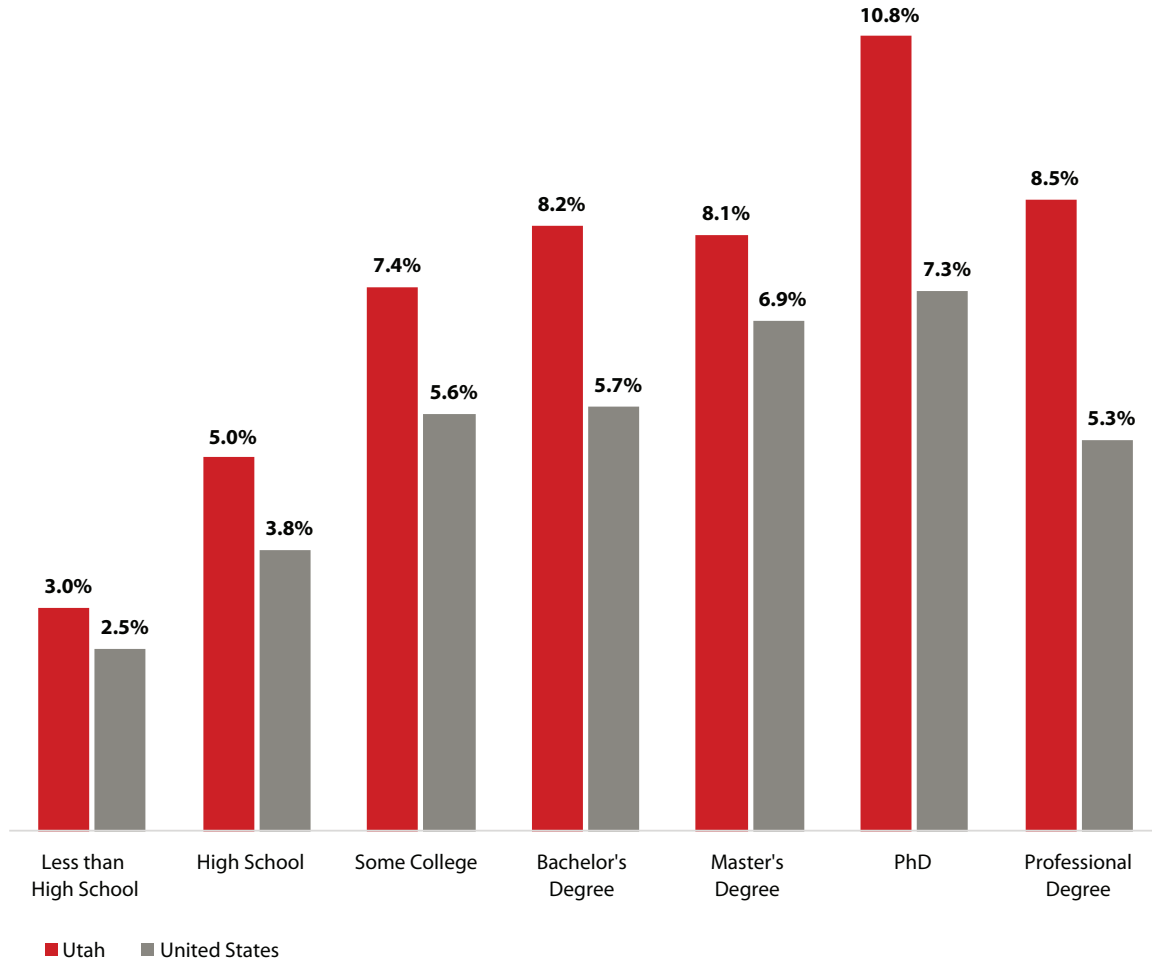
QAMO

STUDENT SUBMISSION
submitted by David Eccles School of Business
Quantitative Analysis of Markets & Organizations
(QAMO) student Tony Jeffs



Industrious Utah

Percentage of employed persons who hold more than one job by level of educational attainment

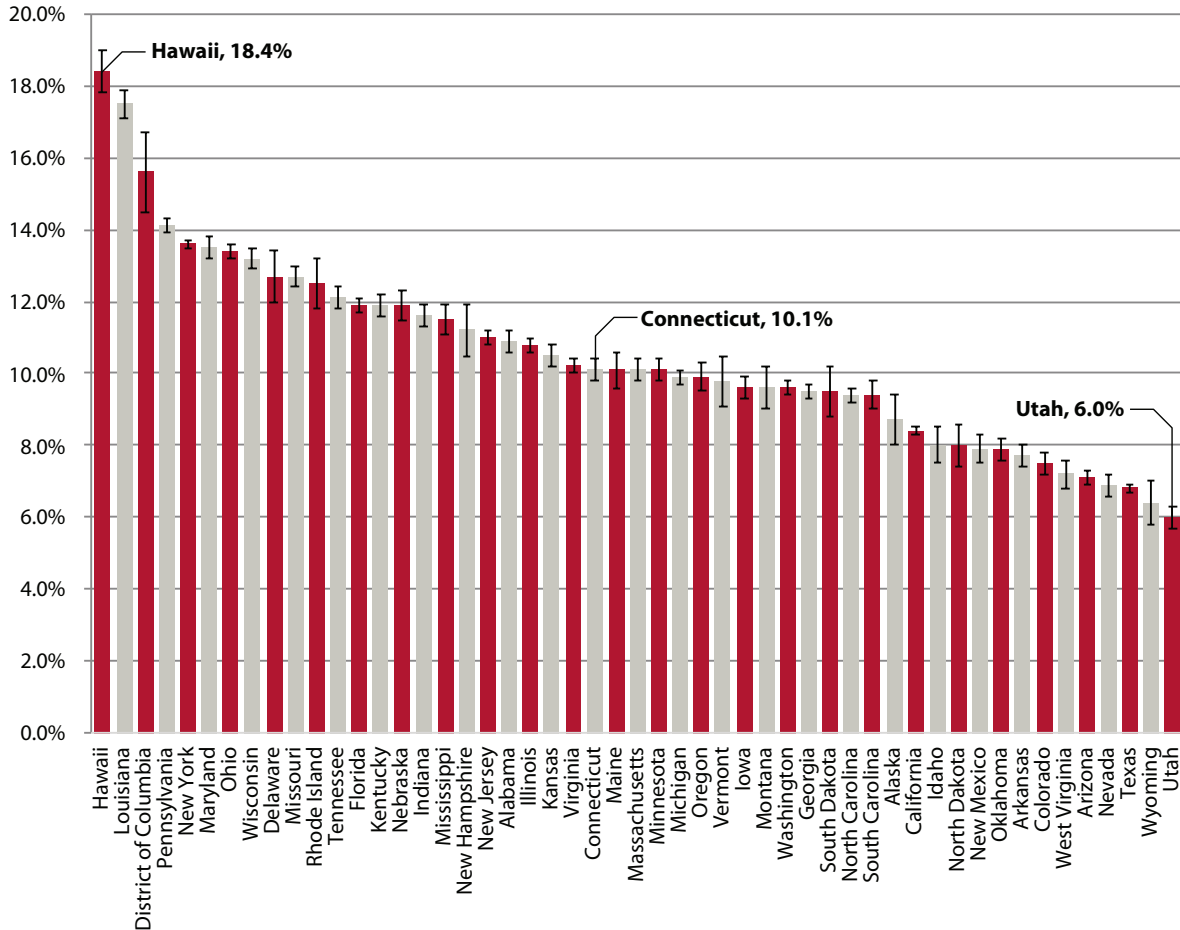


Note: Data from 2010-2018.

Source: Kem C. Gardner Policy Institute analysis of Integrated Public Use Microdata Series, Current Population Survey, 2010-2018

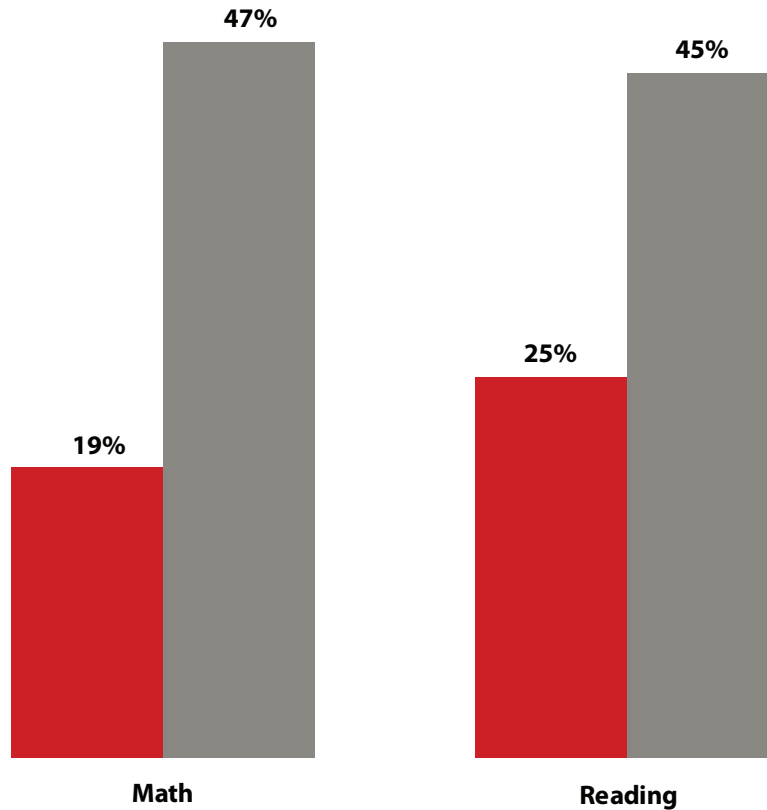
Public ed committment

Percent of K-12 students enrolled in private education or homeschooled, 2013-2017



Note: Error bars represent a 90% confidence interval.
 Source: U.S. Census Bureau 2013-2017 American Community Survey 5-year Estimates

Utah 8th graders proficient in reading and math, by National Free and Reduced School Lunch Program eligibility, 2019



■ Eligible for School Lunch Program

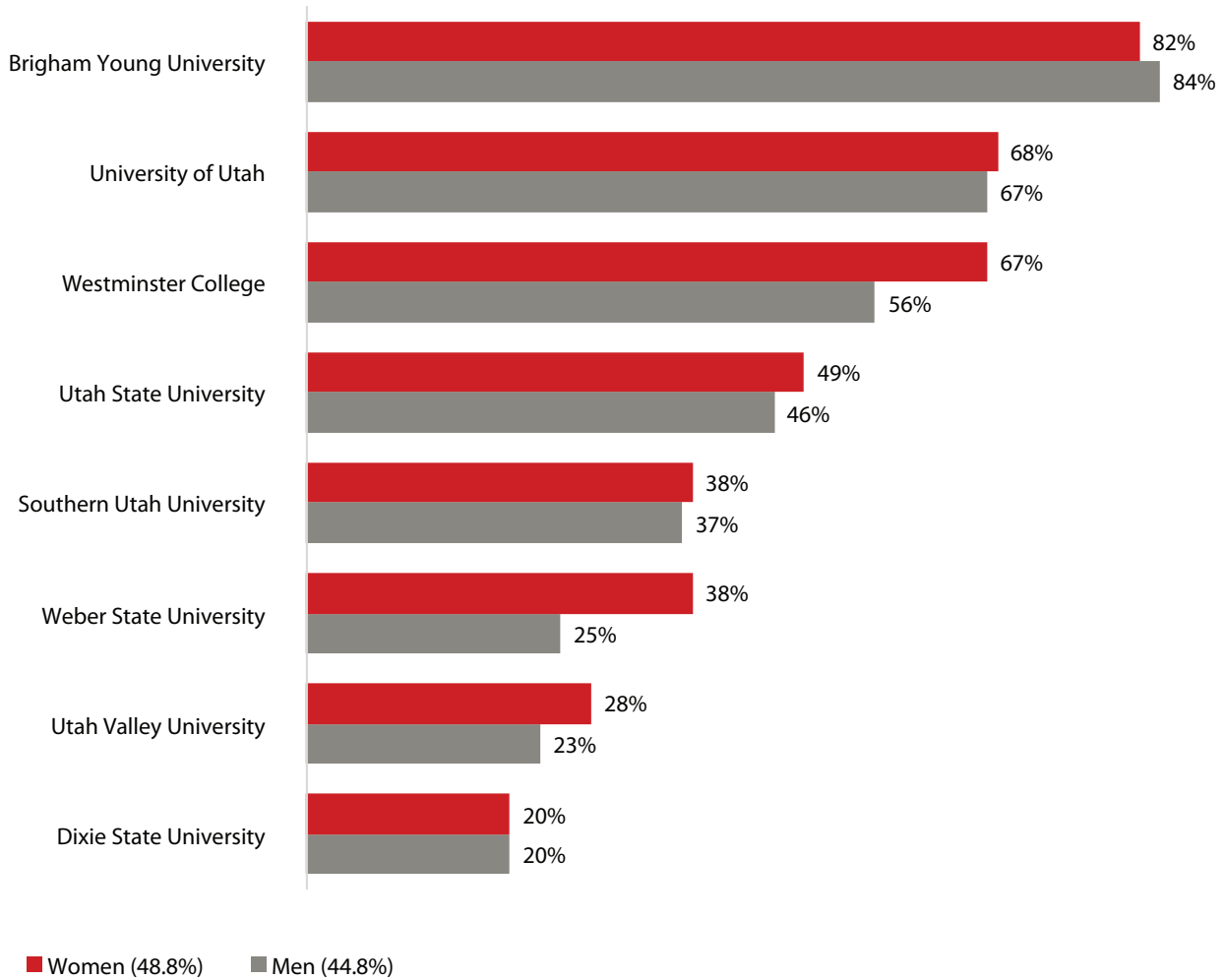
■ Not Eligible for School Lunch Program

Notes: Students may be eligible for the the National School Lunch Program: (1) if their family participates in other federal programs including SNAP, TANF or WIC; or (2) if the child is homeless, a migrant, runaway or foster child; or, (3) based on income and family size, children from families at or below 130% of the federal poverty line (for free lunch) and those between 130%-185% of the poverty line (for reduced lunch). Note: The National Center for Education Statistics defines 8th graders' achievement levels in reading and math as either "below basic," "basic," "proficient," or "advanced."

Source: National Center for Education Statistics, National Assessment of Educational Progress

Cougars finish what they start

Bachelor's degree 6-Year graduation rate by sex and institution in Utah

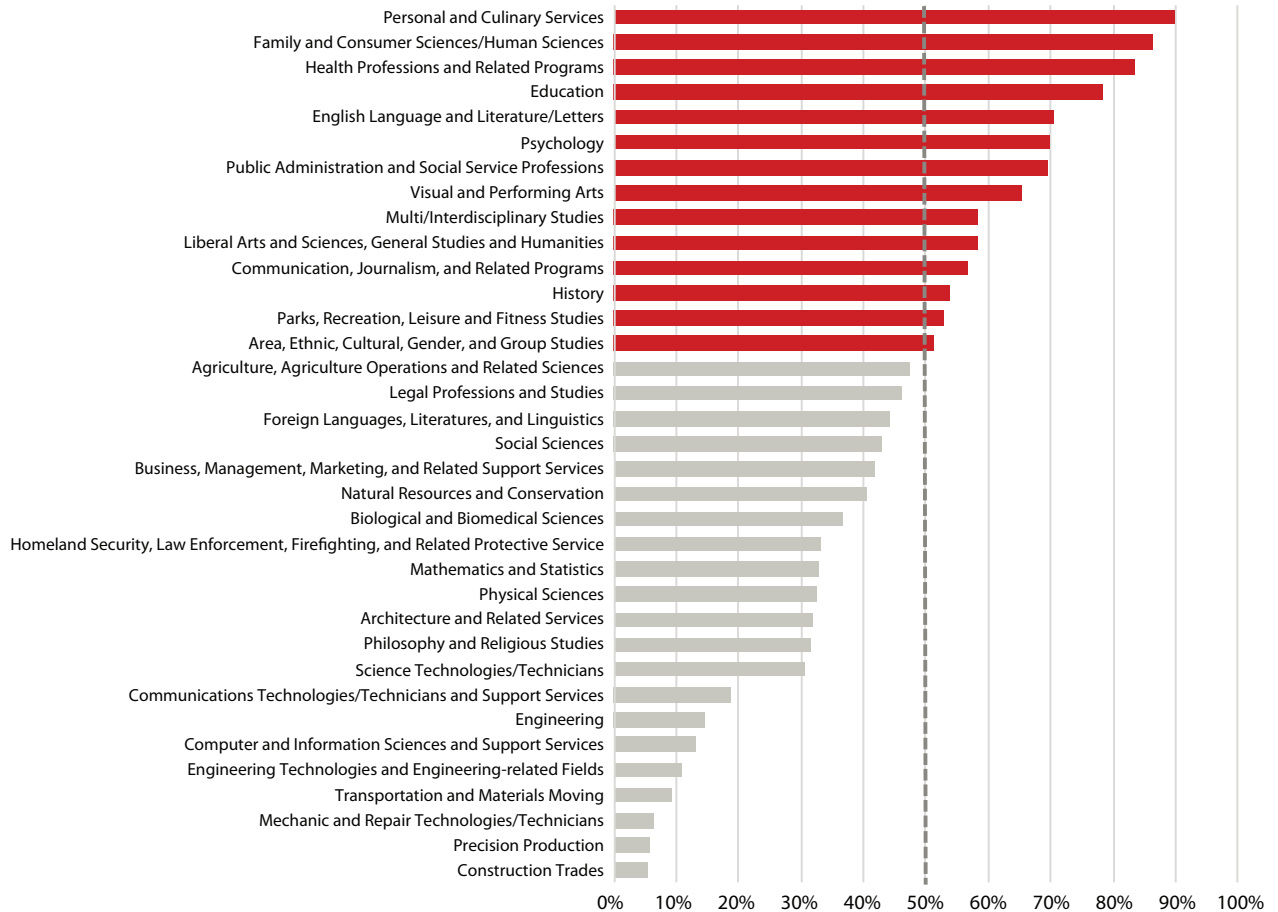


Source: National Center for Education Statistics, IPEDS database., 2017

Where's Rosie the Riveter?

Women's share of degree and certificate completions by field

Average completion rates for certificates, associate's degrees, bachelor's degrees, master's degrees, and doctorate degrees

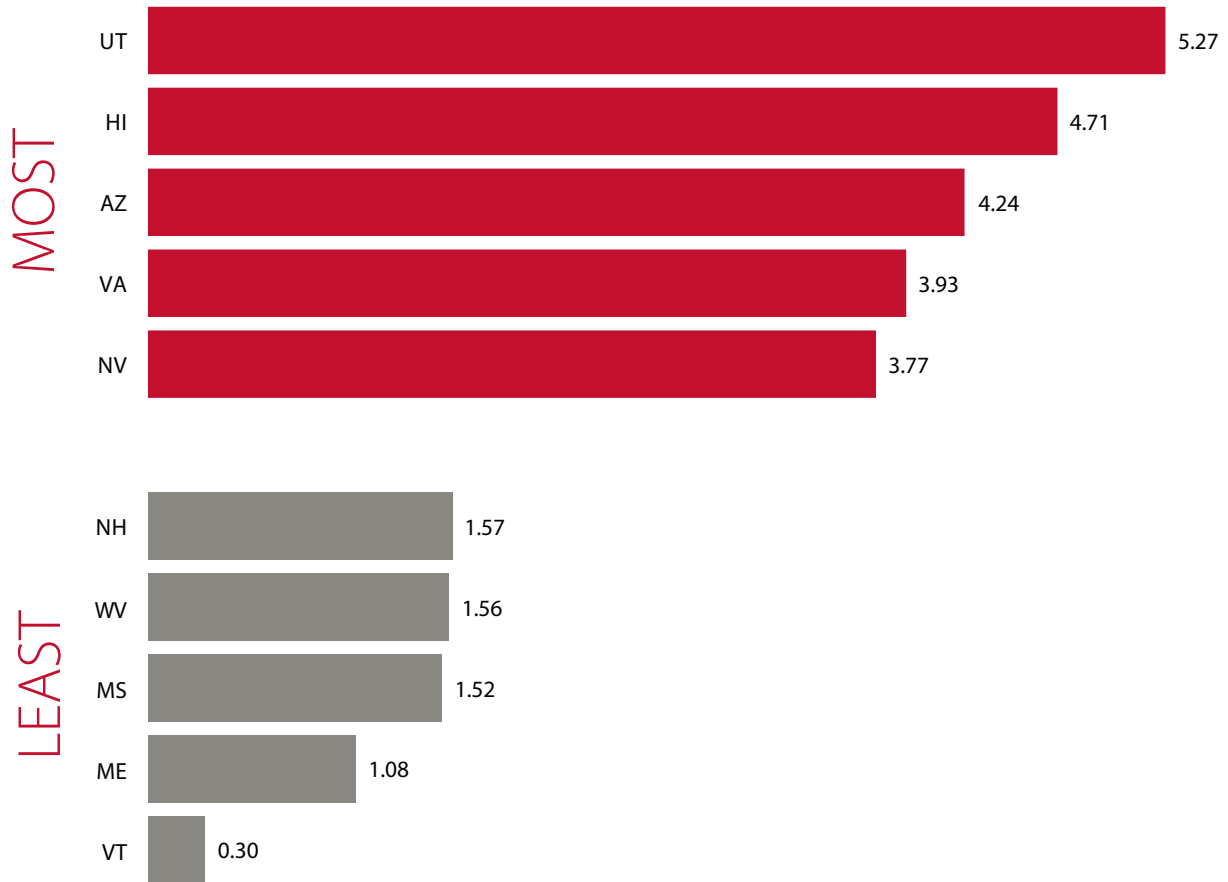


Note: Includes data only for public and private nonprofit institutions.
 Source: National Center for Education Statistics, IPEDS database, 2017

A lot of date nights

States with the highest and lowest per capita annual movie attendance

Tickets sold per person

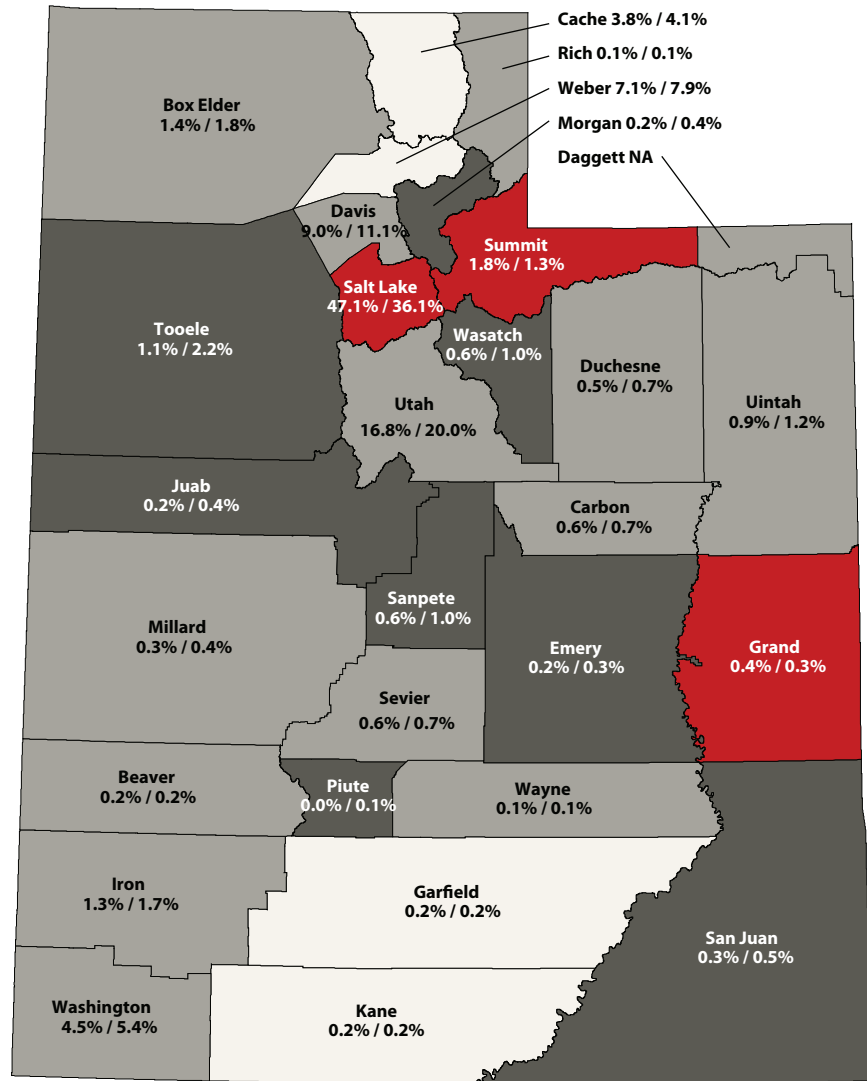
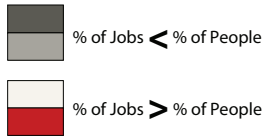


Source: Larry H. Miller Sports & Entertainment

Where the jobs are, where the people are

Distribution of jobs and population in Utah, 2018

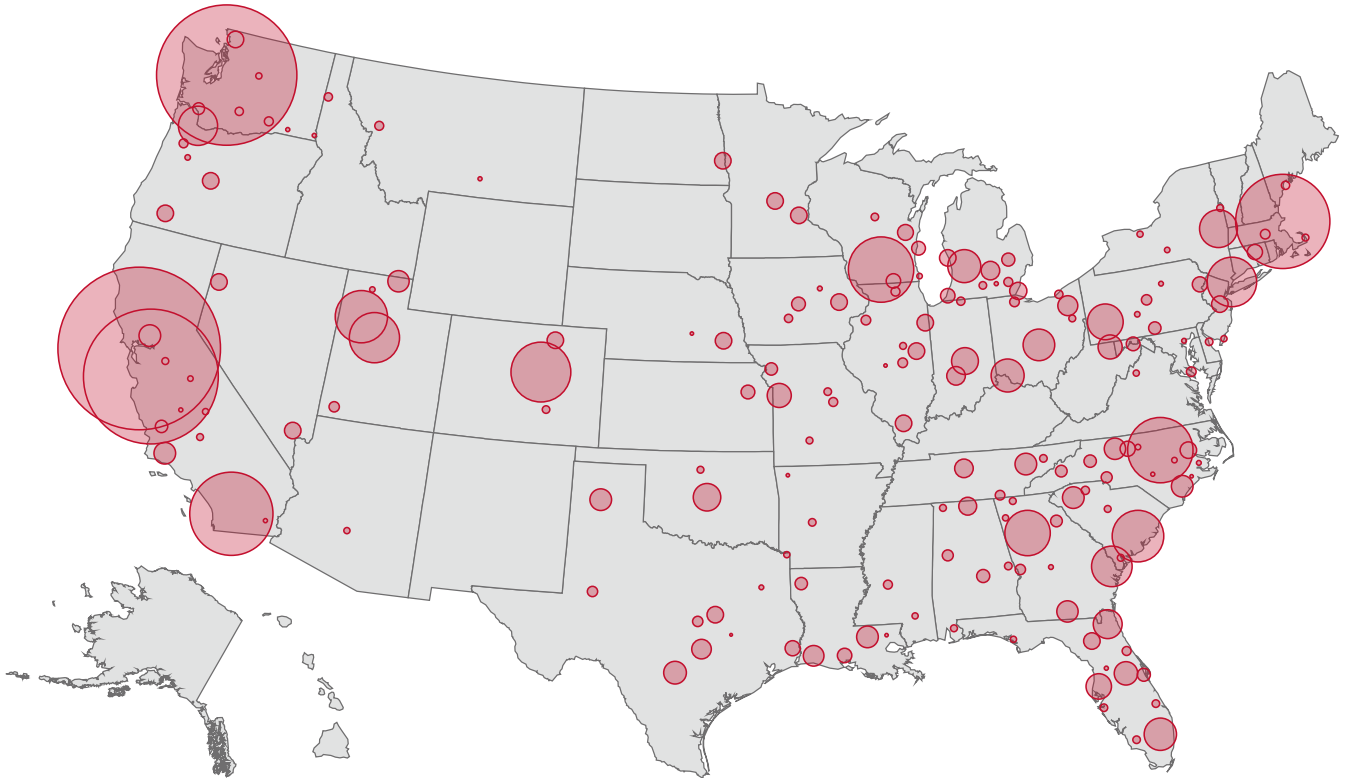
% of state's jobs /
% of state's population



Sources: U.S. Bureau of Labor Statistics and Utah Population Committee

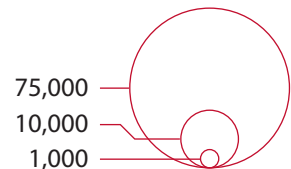
Intermountain West island of innovation

Metro areas with gains in innovation jobs, 2005-2017



Gained the most (in thousands)

1 San Francisco.....+77	6 Raleigh, N.C.....+12
2 Seattle.....+56	7 Madison, Wis.....+12
3 Silicon Valley.....+52	8 Denver.....+10
4 Boston.....+26	9 Salt Lake City.....+8
5 San Diego.....+20	10 Charleston, S.C.....+7

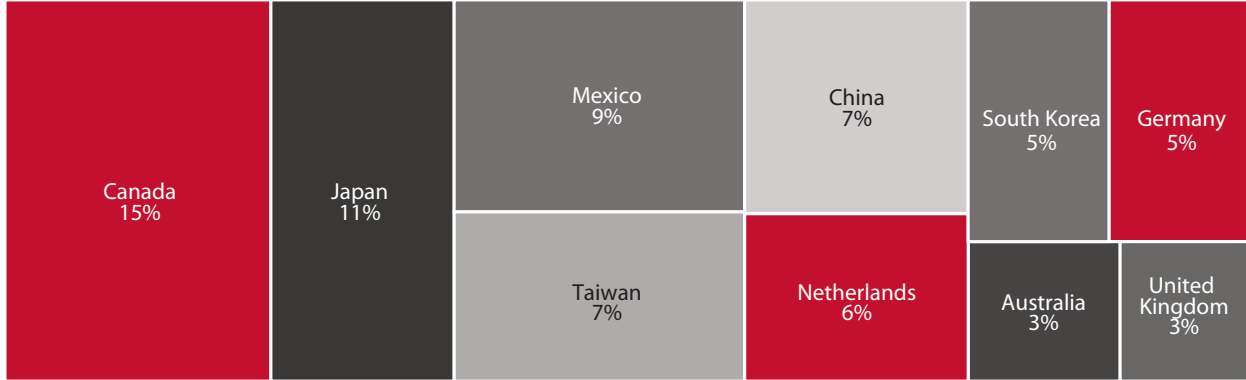


Source: Brookings Institution analysis of Emsi data published in the New York Times, December 9, 2019

Global connections

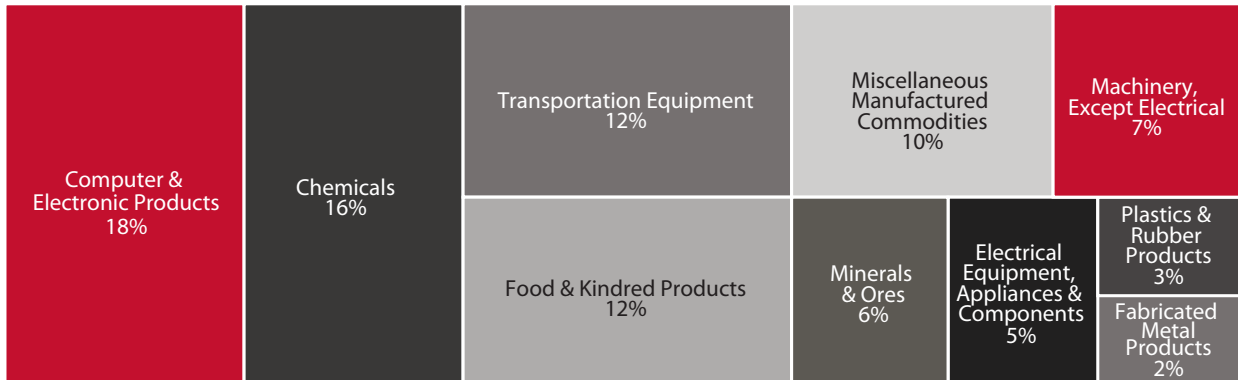
Utah's top 10 trading partners, 2019

Percent of total value excluding primary metals



Utah's top 10 exports, 2019

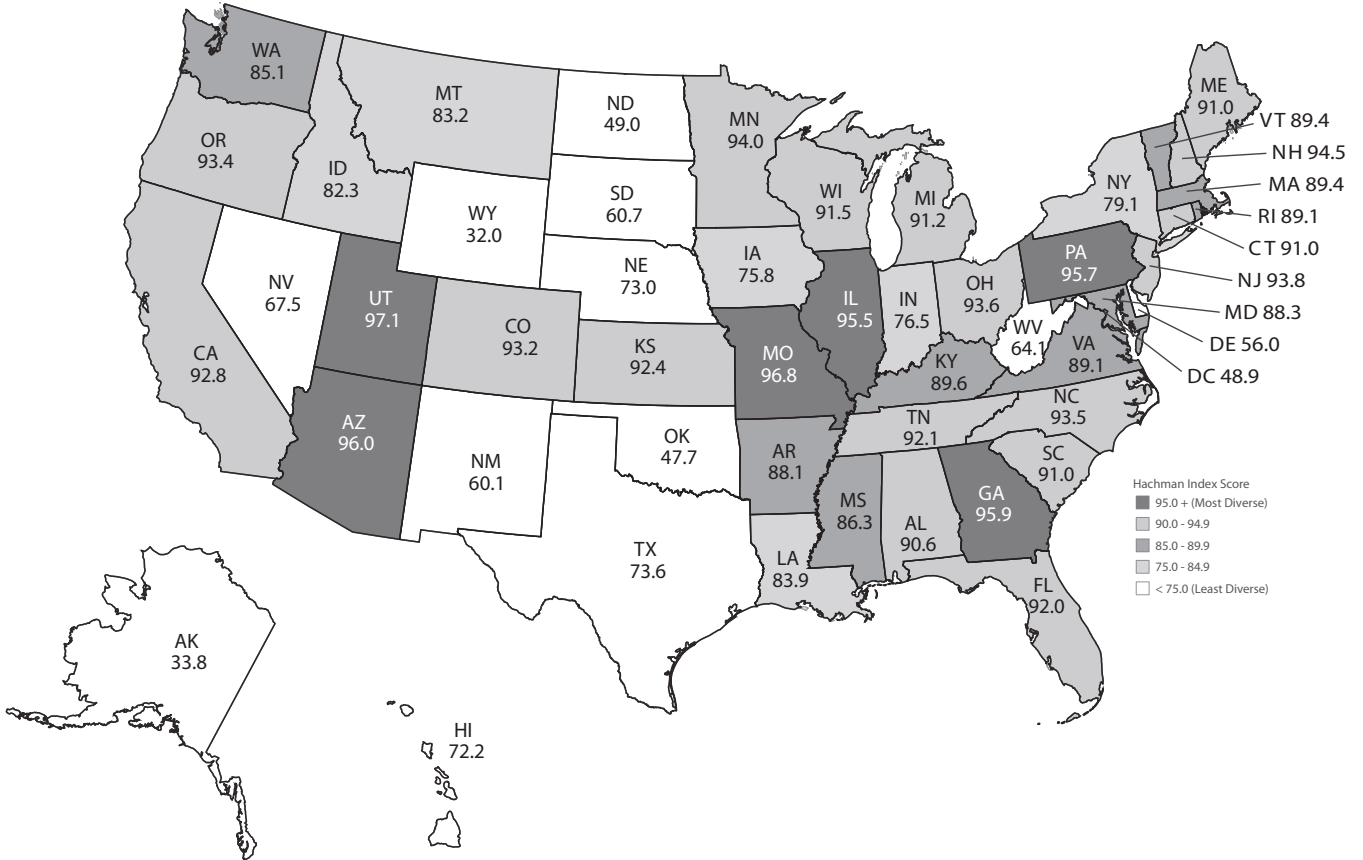
Percent of total value excluding primary metals



Note: 2019 estimate; Primary metals accounted for 47% of Utah's exports in the first three quarters of 2019; 93% of primary metal exports went to the United Kingdom during this time.
Source: USA Trade Online

Same story, different year

Hachman Index of Economic Diversity, 2018



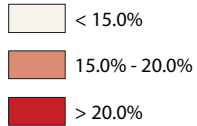
Hachman Index Score

- 95.0 + (Most Diverse)
- 90.0 - 94.9
- 85.0 - 89.9
- 75.0 - 84.9
- < 75.0 (Least Diverse)

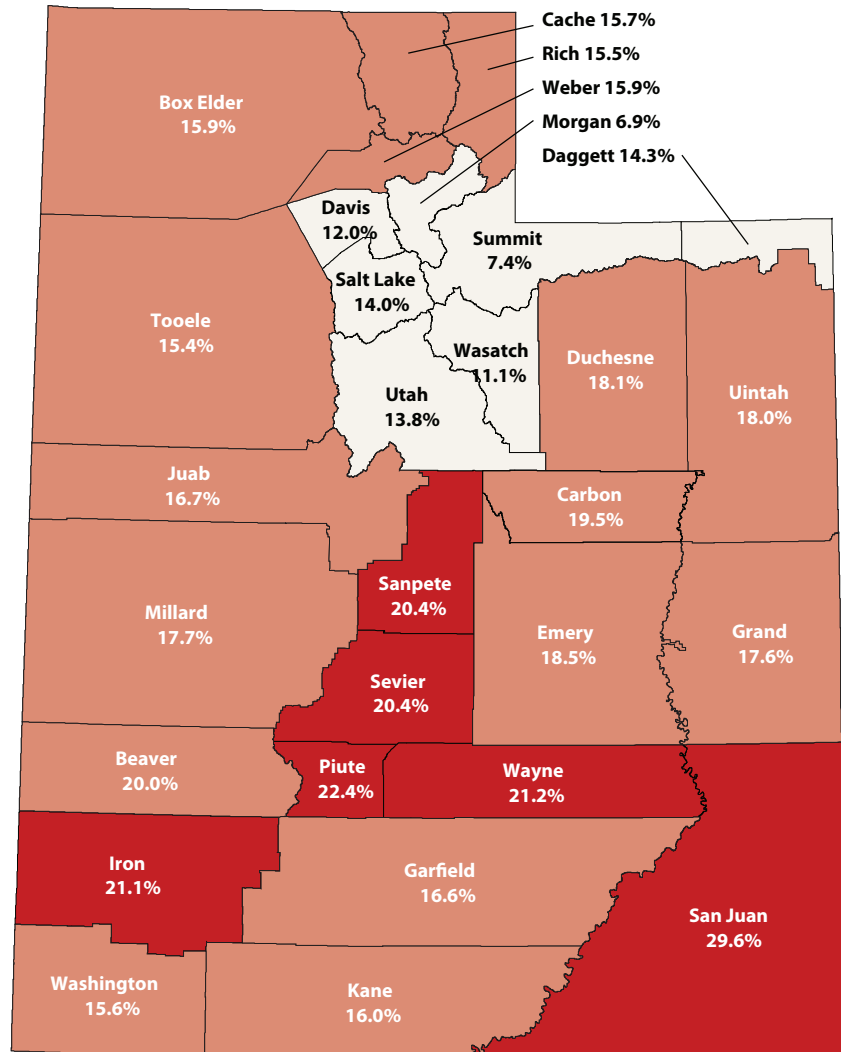
Note: Value of 100 would mean that a state's economic activity is distributed exactly like the nation's; more diverse economies have a higher index score.
 Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics data

Another way to measure the greater Wasatch?

Percent of 2017 federal individual income tax returns with an Earned Income Tax Credit



Statewide: 14.4%

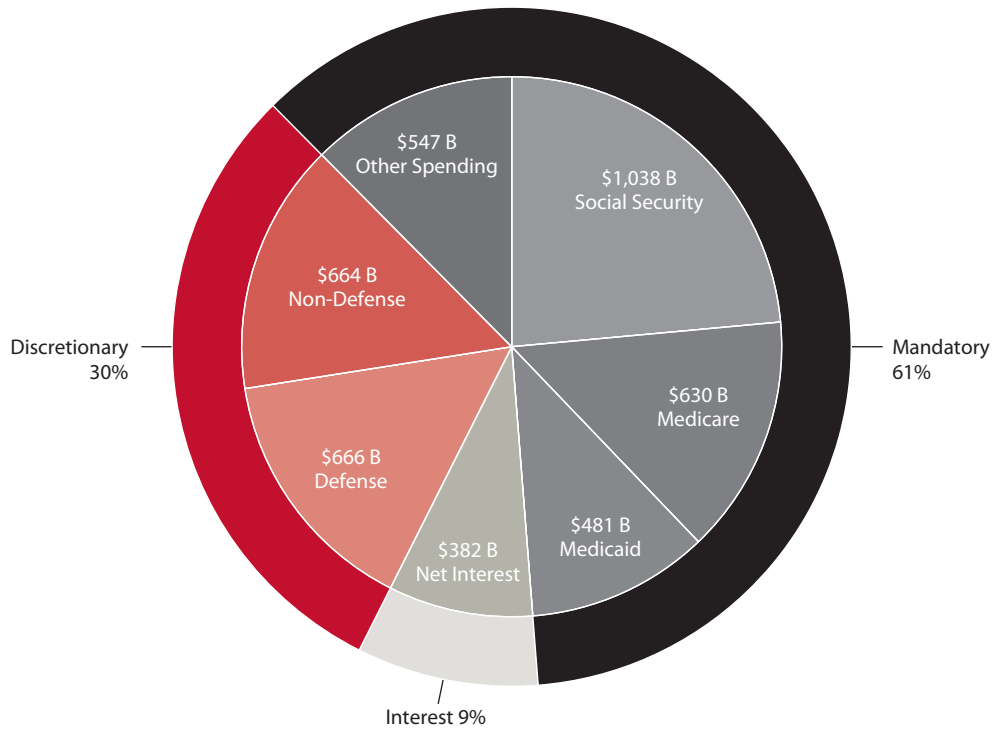


Source: Kem C. Gardner Policy Institute analysis of IRS Statistics of Income data

Mandatory and defense over 75% of budget

Allocation of the federal budget

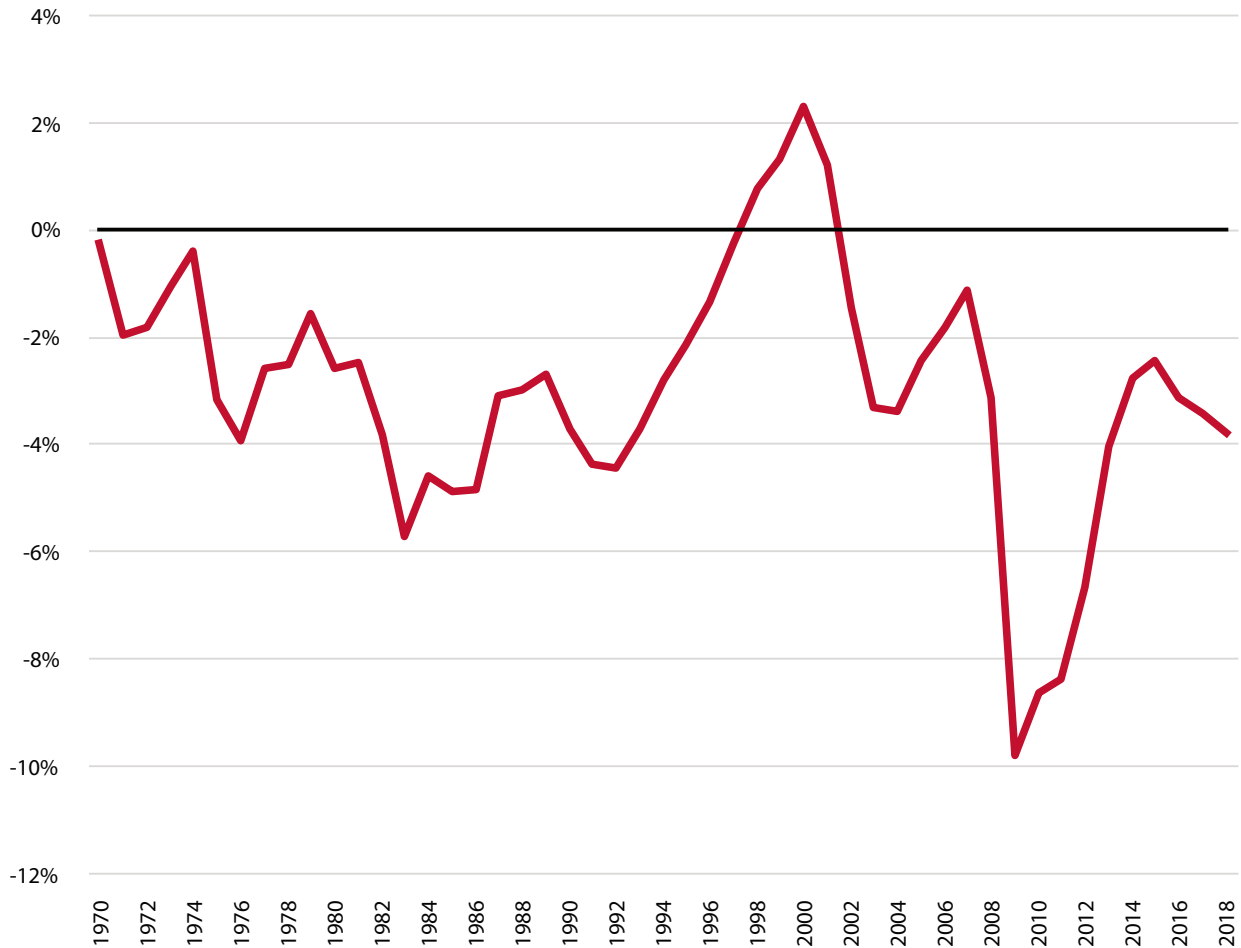
\$4.4 trillion total, FFY 2019



Source: Committee for a Responsible Federal Budget

Economy expands, federal budget deteriorates

Federal budget balance as a percent of GDP



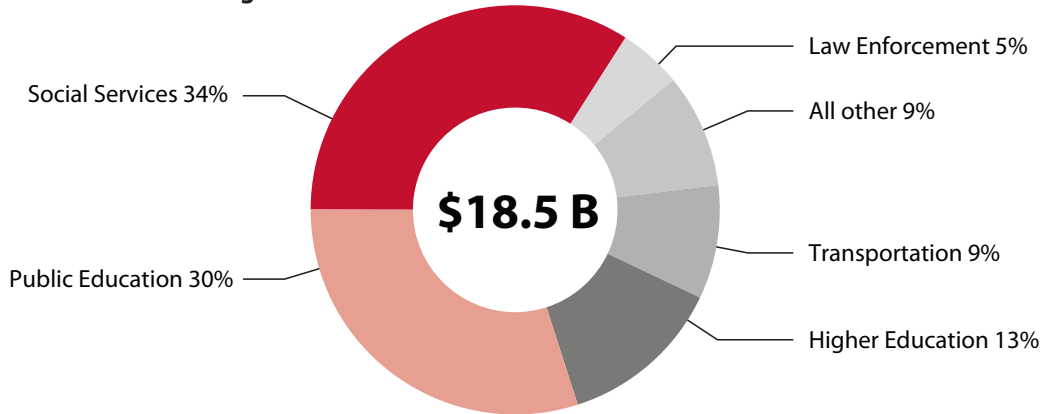
Source: Federal Reserve Bank of St. Louis

Education and social services dominate

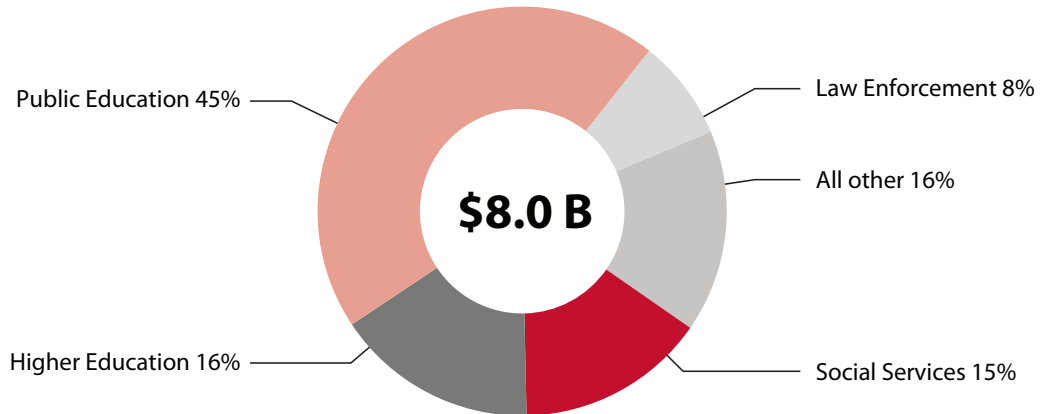
State of Utah FY 2020 Budget

Appropriated during the 2019 General Session

Use of funds, all sources of funding



Use of funds, unrestricted general and education funds (state funds)

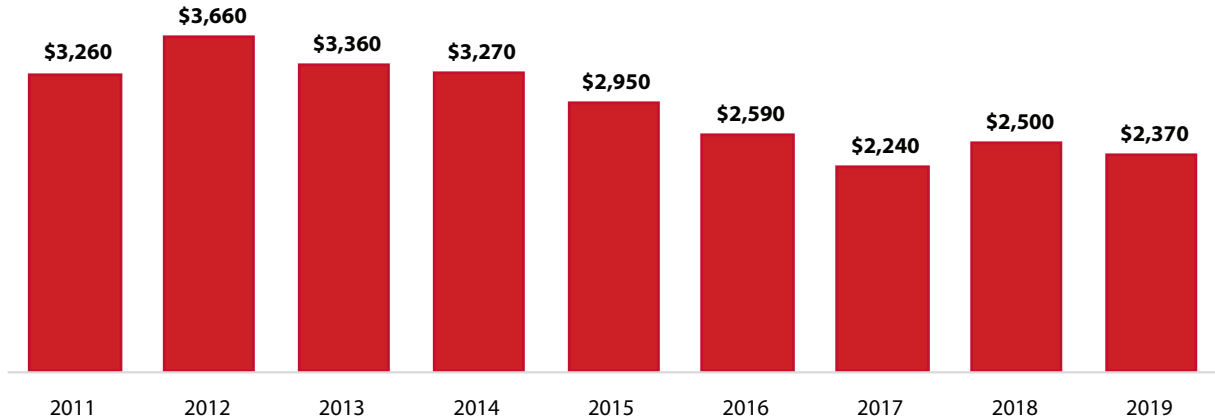


Source: Utah Office of the Legislative Fiscal Analyst

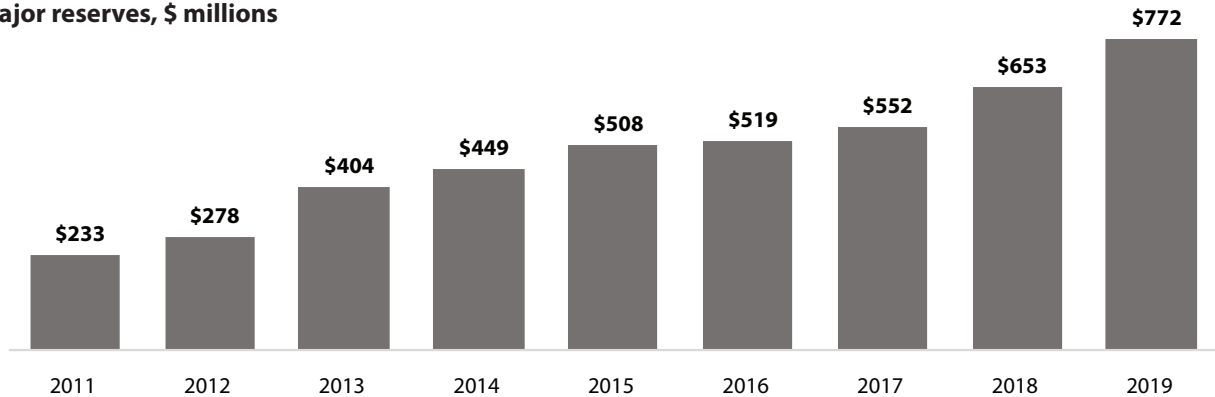
Moving in the right directions

State of Utah debt and reserves

General obligation debt, \$ millions



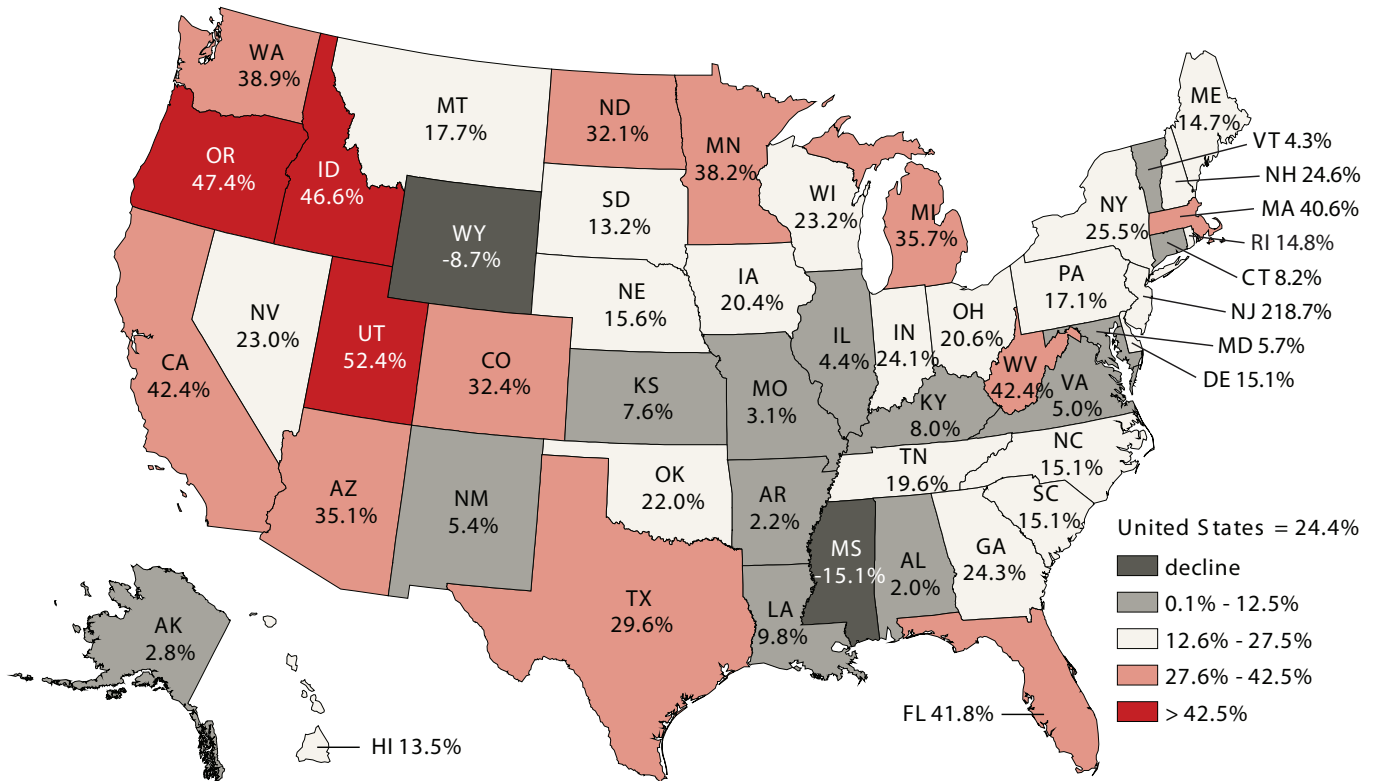
Major reserves, \$ millions



Note: Major reserves include Education Fund, General Fund, and Medicaid budget reserves
Source: Utah Office of the Legislative Fiscal Analyst

Build Utah

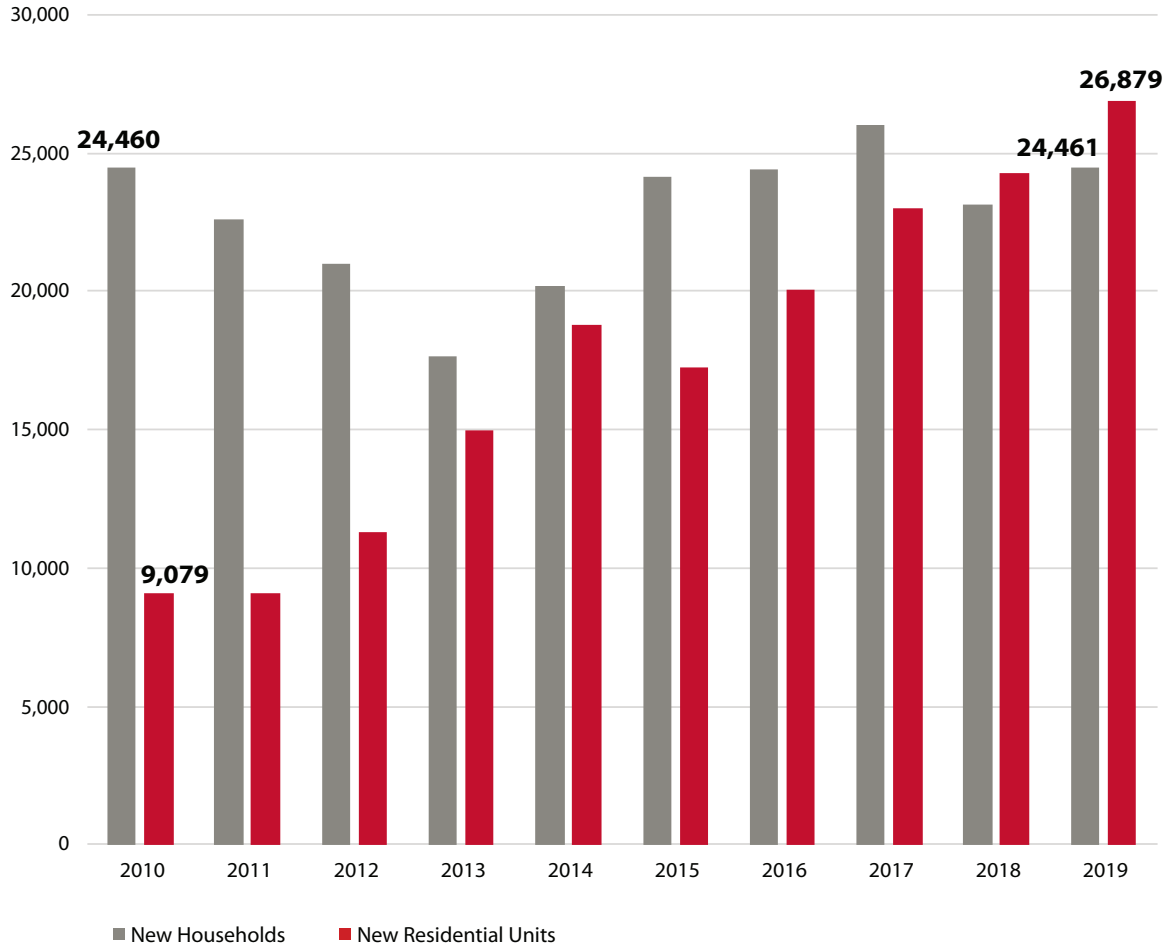
Change in construction employment since the end of the recession



Note: Percent change between 2009 and 2019, 2019 is estimated.
 Source: Kem C. Gardner Policy Institute analysis of U.S. Bureau of Labor Statistics data

Playing catch-up

Annual growth in households and housing units in Utah



Source: Kem C. Gardner Policy Institute

Boise catching up

Home price growth in the West's largest metro areas

Single family existing home median prices

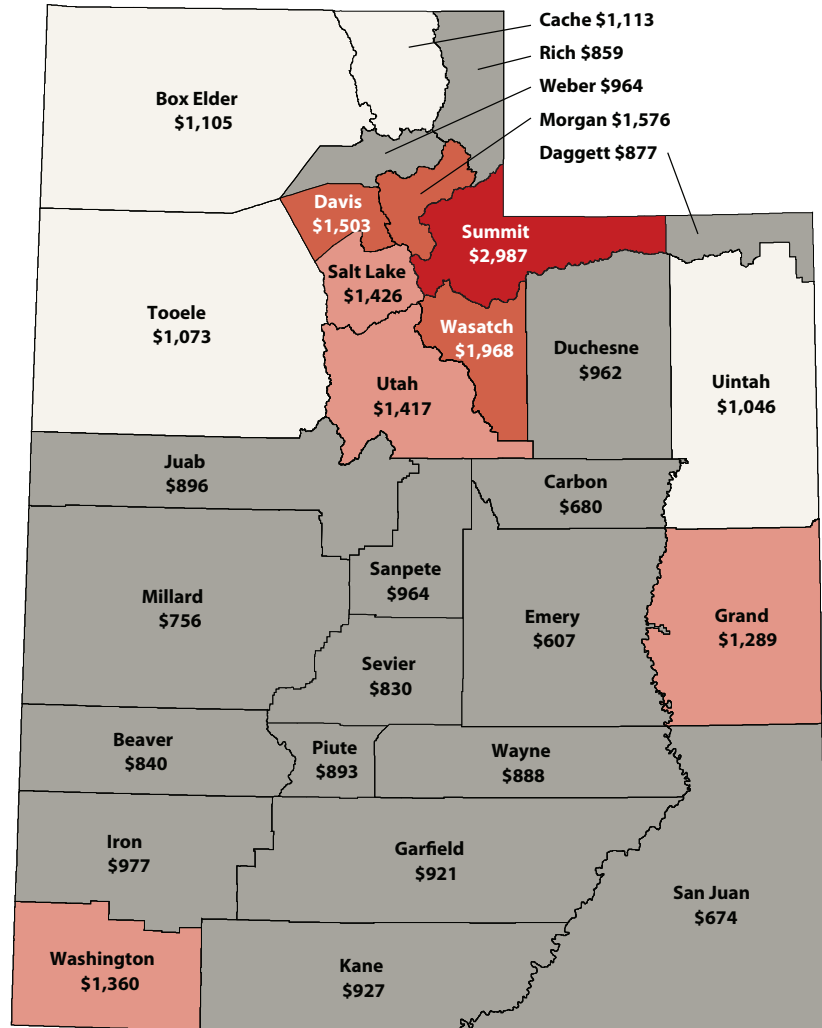
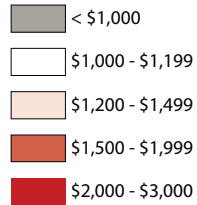
Metro Area	Q3 2019 Median Price	% Change	
		1-year	10-year
Salt Lake City, UT	\$361,000	12.0%	64.9%
Boise City, ID	\$303,100	10.3%	97.6%
Albuquerque, NM	\$228,900	9.6%	24.7%
Las Vegas-Henderson-Paradise, NV	\$313,300	6.3%	126.2%
Phoenix-Mesa-Scottsdale, AZ	\$289,200	6.1%	102.7%
Portland-Vancouver-Hillsboro, OR-WA	\$416,000	4.2%	70.1%
Reno, NV	\$401,100	4.0%	108.7%
Seattle-Tacoma-Bellevue, WA	\$520,500	3.5%	61.9%
Denver-Aurora-Lakewood, CO	\$465,700	3.5%	103.3%
Los Angeles-Long Beach-Glendale, CA	\$649,600	3.3%	88.0%
San Jose-Sunnyvale-Santa Clara, CA	\$1,240,000	-4.6%	119.1%
United States	\$280,200	5.1%	57.2%

Source: National Association of Realtors

All real estate is local

Monthly mortgage payments in Utah's counties

Payment associated with the median existing home sales price, Q3 2019



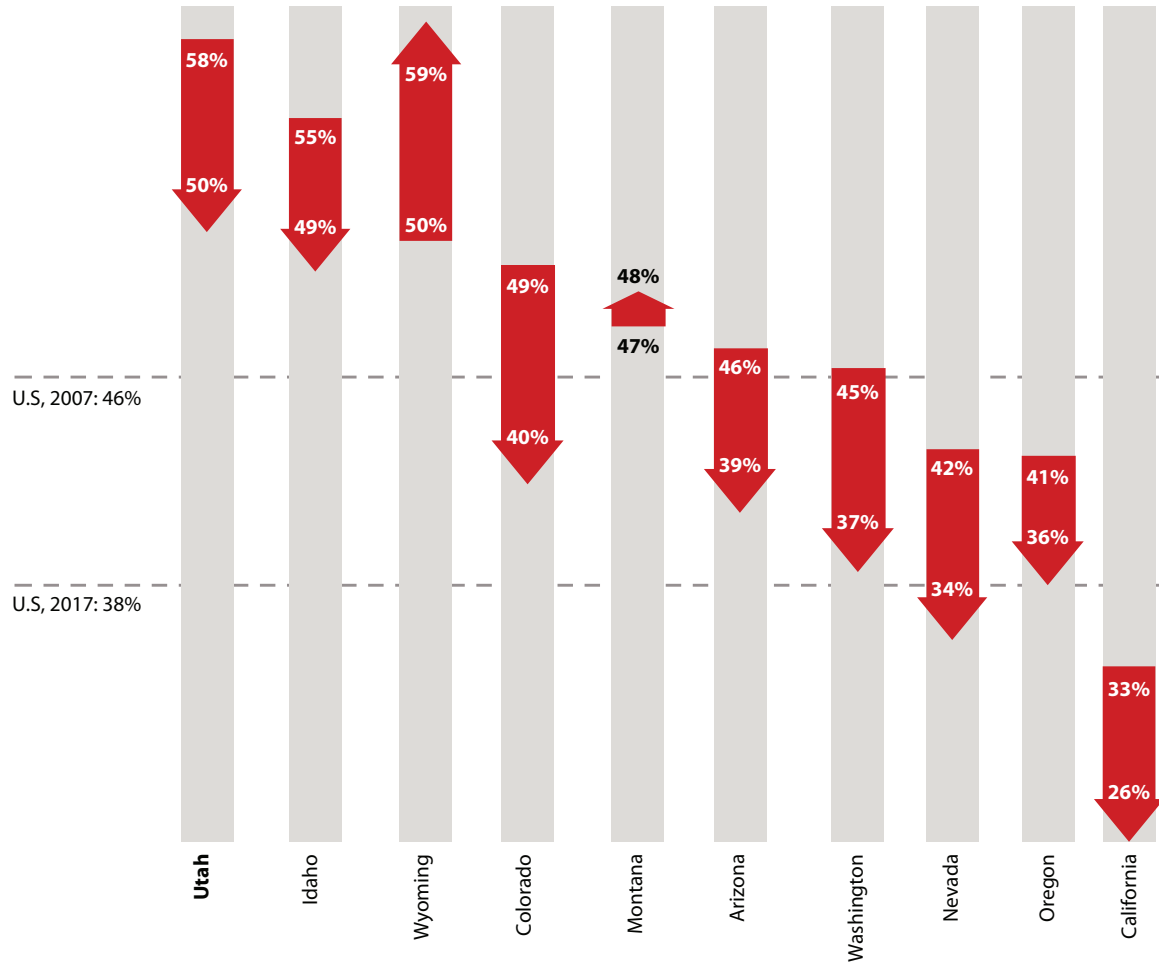
State of Utah = \$1,374

Note: Figures assume a 20% downpayment and the conventional mortgage composite effective interest rate for the quarter, 3.94%.
 Source: Kem C. Gardner Policy Institute analysis of Moody's data

Homeownership harder in most places

Change in young householder homeownership rates between 2007 and 2017

Western state rates for households with head aged 25-34 years

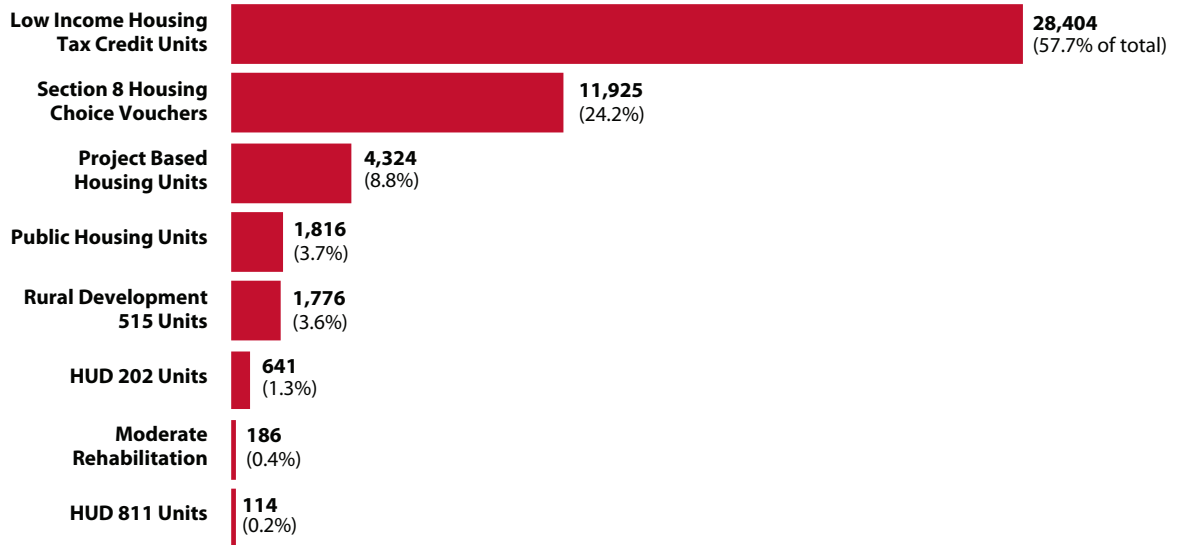


Note: The homeownership rate is the proportion of occupied dwellings which are occupied by the owners.
Source: U.S. Census Bureau American Community Survey

Housing assistance in Utah

Rent-assisted units and housing vouchers in Utah, 2019

49,186 total assisted units and vouchers



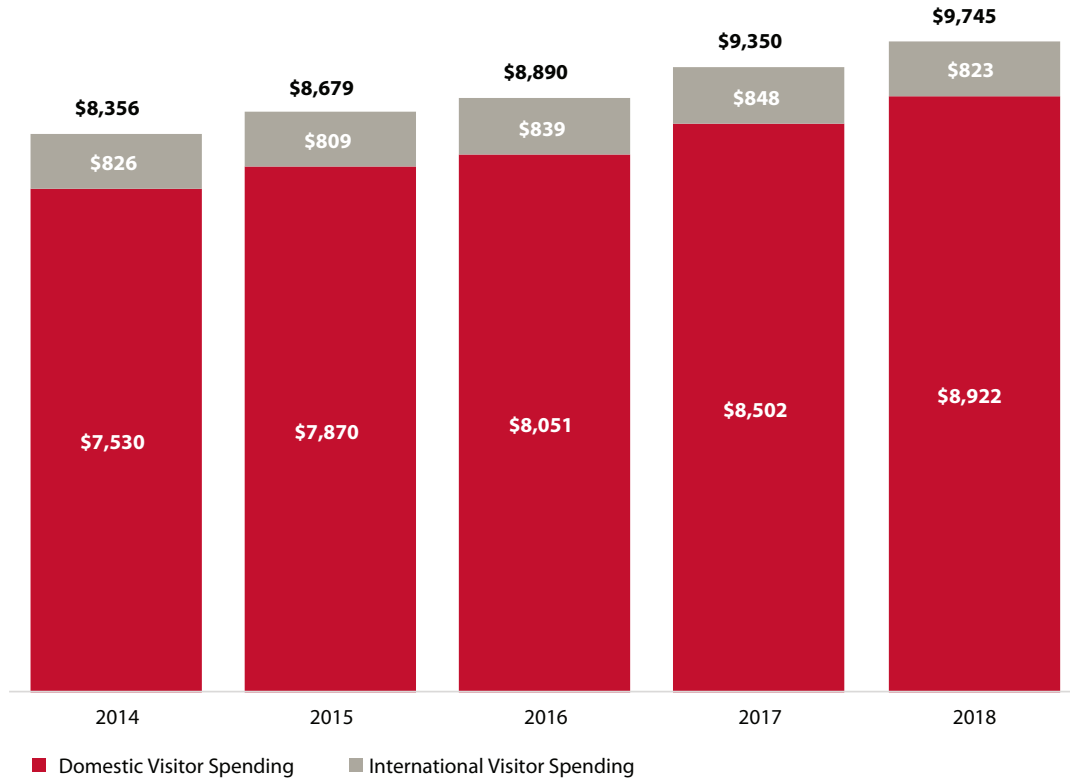
Low Income Housing Tax Credit Program	A program which incentivizes private investment in affordable housing units through federal tax credits.
Section 8 Housing Choice Vouchers	Voucher subsidies that can be used at a rental unit of the tenant's choosing.
Project Based Housing Program	A program which attaches a housing voucher subsidy to a specific rental unit.
Public Housing Units	Units owned by a local housing authority for subsidized rent to qualifying individuals or families.
Rural Development 515	A program that provides loans or guarantees loans for affordable housing and community development in rural areas.
HUD 202	A program that develops and subsidizes housing with access to supportive services for low-income, elderly adults.
Moderate Rehabilitation	A program that upgrades existing housing stock which then provides subsidized rent to low-income families.
HUD 811	A program that develops and subsidizes housing with access to supportive services for low-income, disabled adults.

Sources: Assisted Housing National and Local Estimates, HUD portal, Utah Housing Corporation, and USDA Rural Development

Welcome to Utah!

Domestic and international visitor spending in Utah

Millions of 2018 dollars

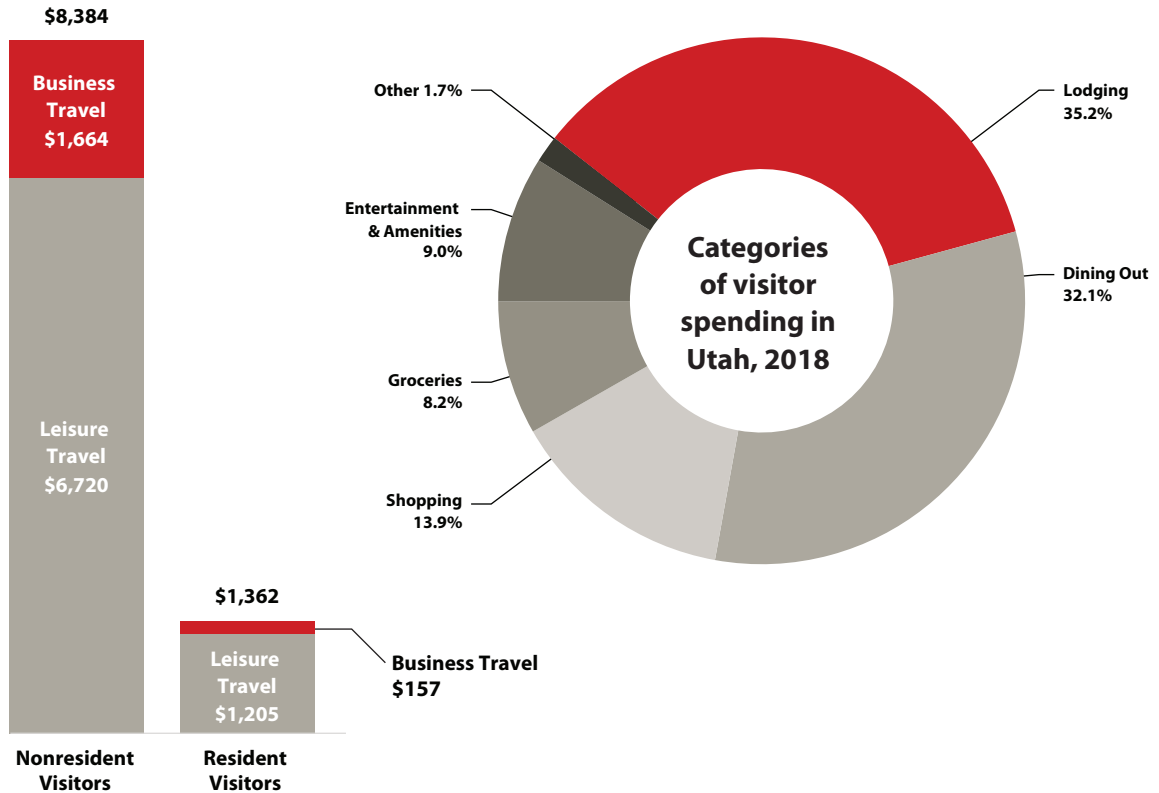


Note: Domestic visitors include both Utah residents and non-residents.
Source: U.S. Travel Association

Bienvenido a Utah!

Nonresident and resident visitor spending in Utah, 2018

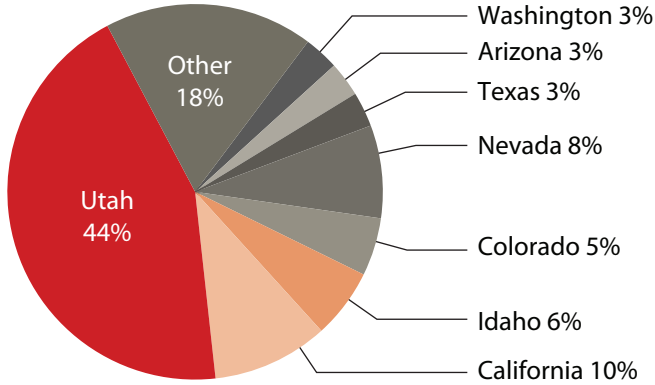
Millions of 2018 dollars



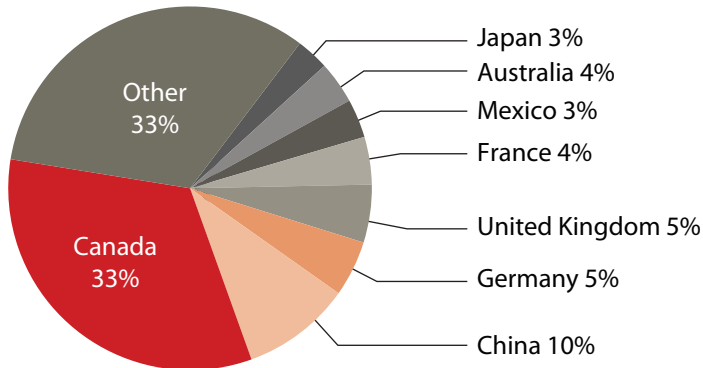
Note: Visitor spending allocation excludes public transportation spending (airfare, train, bus, taxi, etc.).
Source: Kem C. Gardner Policy Institute analysis of U.S. Travel Association data

Yá'at'ééh Áshjì'bitó Hahodzo'gi

Share of total domestic visitors by state, 2018

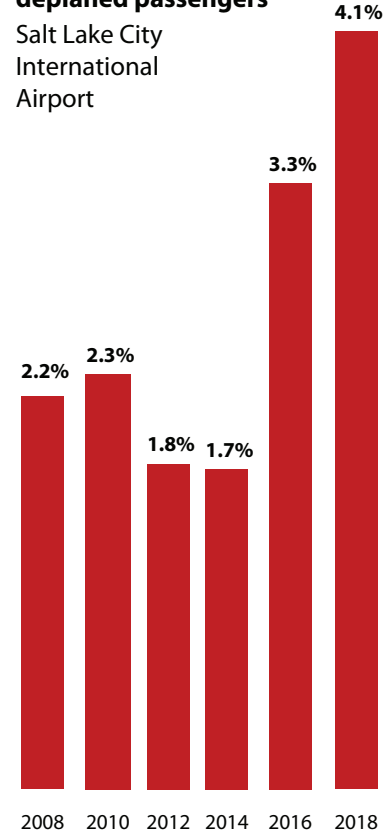


Share of total international arrivals by country, 2018



International share of
deplanned passengers

Salt Lake City
International
Airport

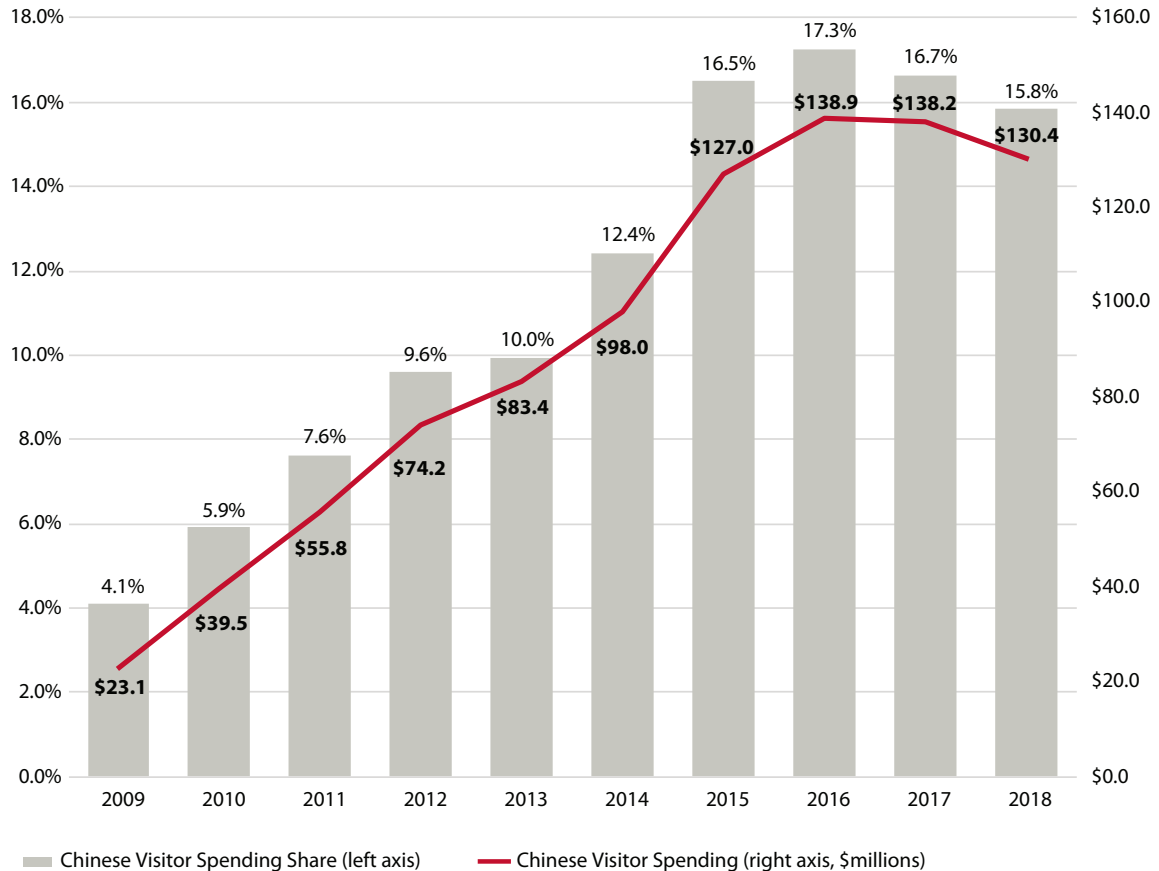


Sources: TNS Global

欢迎来到犹他州

Chinese visitor spending in Utah

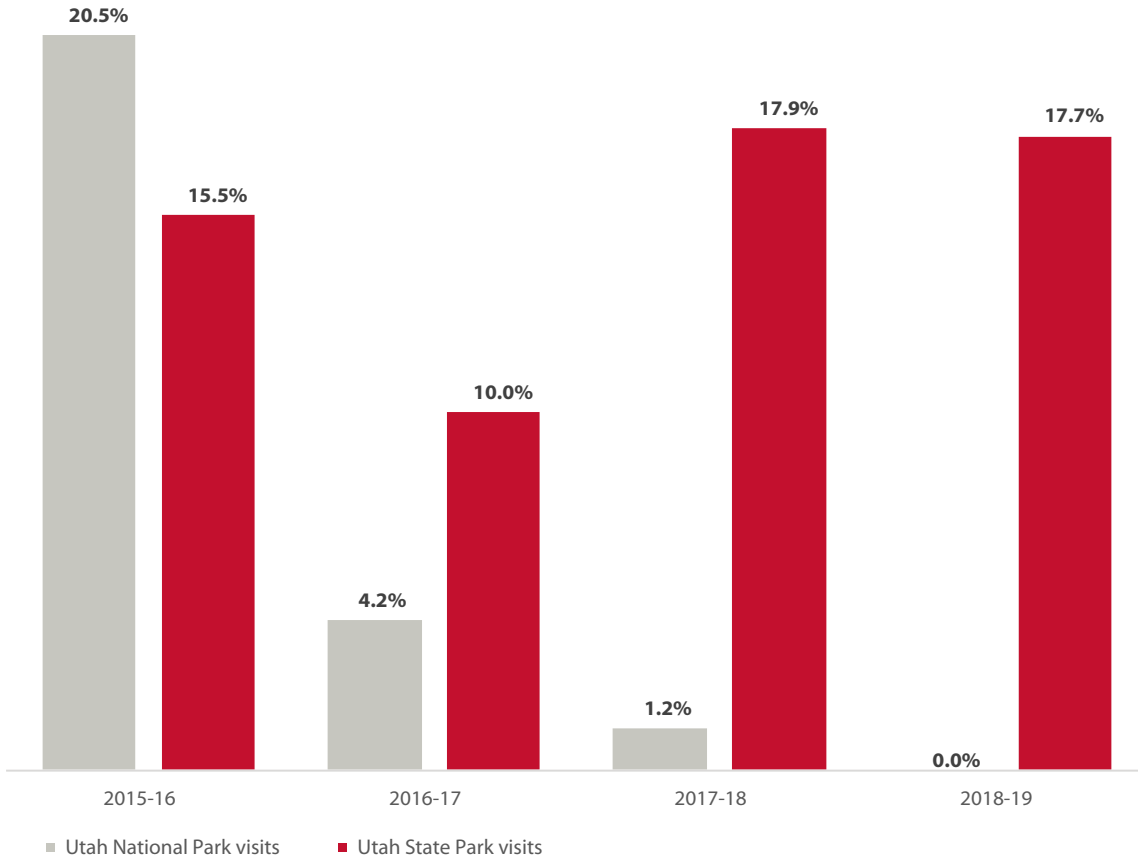
Total and share of all international visitor spending in Utah



Source: Tourism Economics

Willkommen in Utah!

Annual growth in visits to Utah's state and national parks

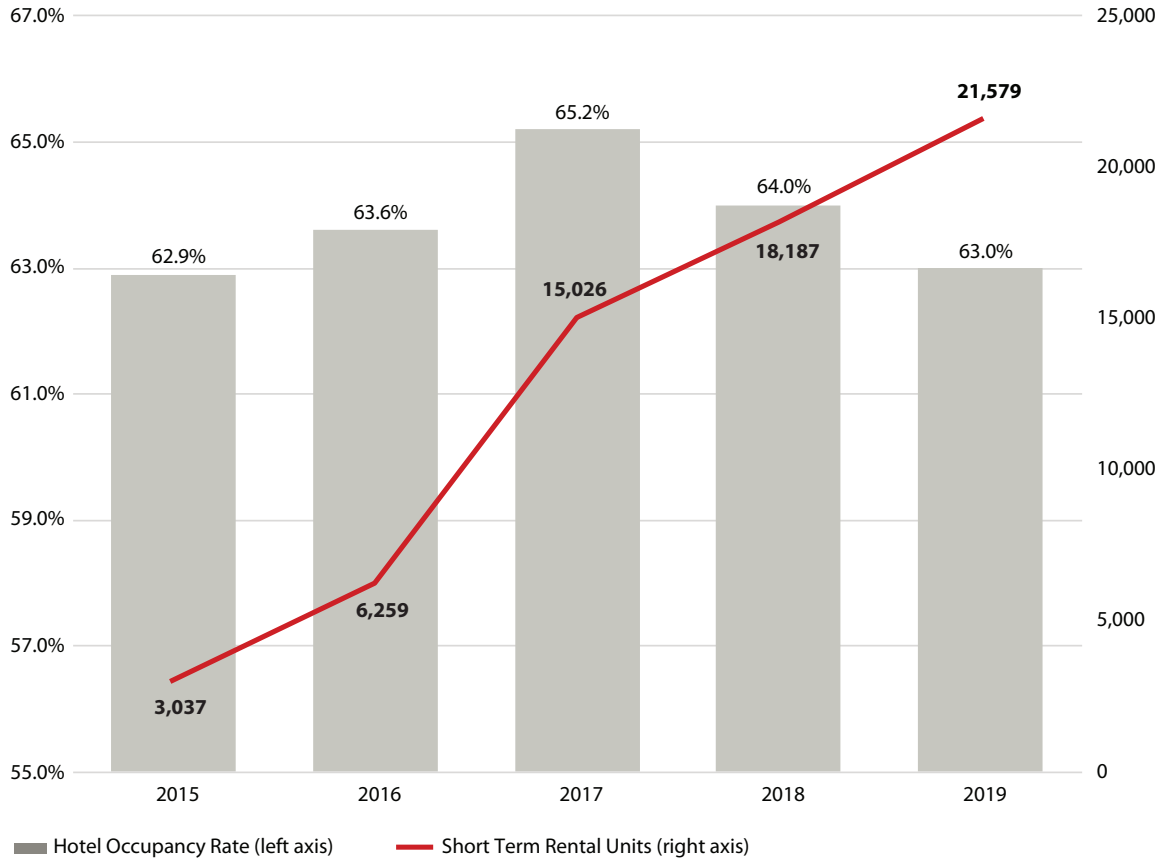


Note: 2018-19 covers January-August visitation only.

Source: Kem C. Gardner Policy Institute analysis of National Park Service and Utah State Parks data

Nau mai ki Utah!

Hotel occupancy rates and short-term rental units in Utah

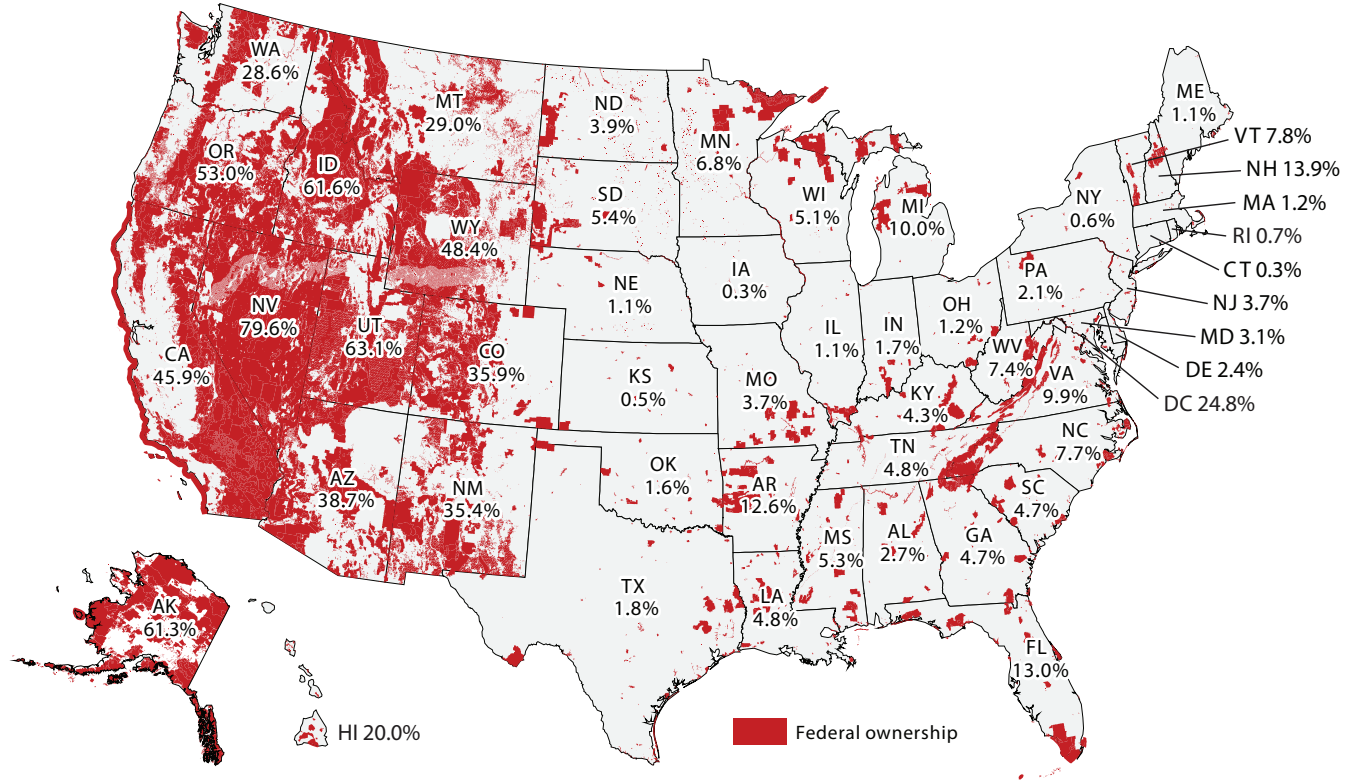


Note: Short term rental units include Airbnb and HomeAway/VRBO properties only; units shown are number available at least one night during the month of July; the 2019 hotel occupancy rate is an estimate.

Source: Kem C. Gardner Policy Institute analysis of AirDNA and STR, Inc. data

Federal government Utah's largest landlord

Percent of state land area that is owned by the federal government, 2015

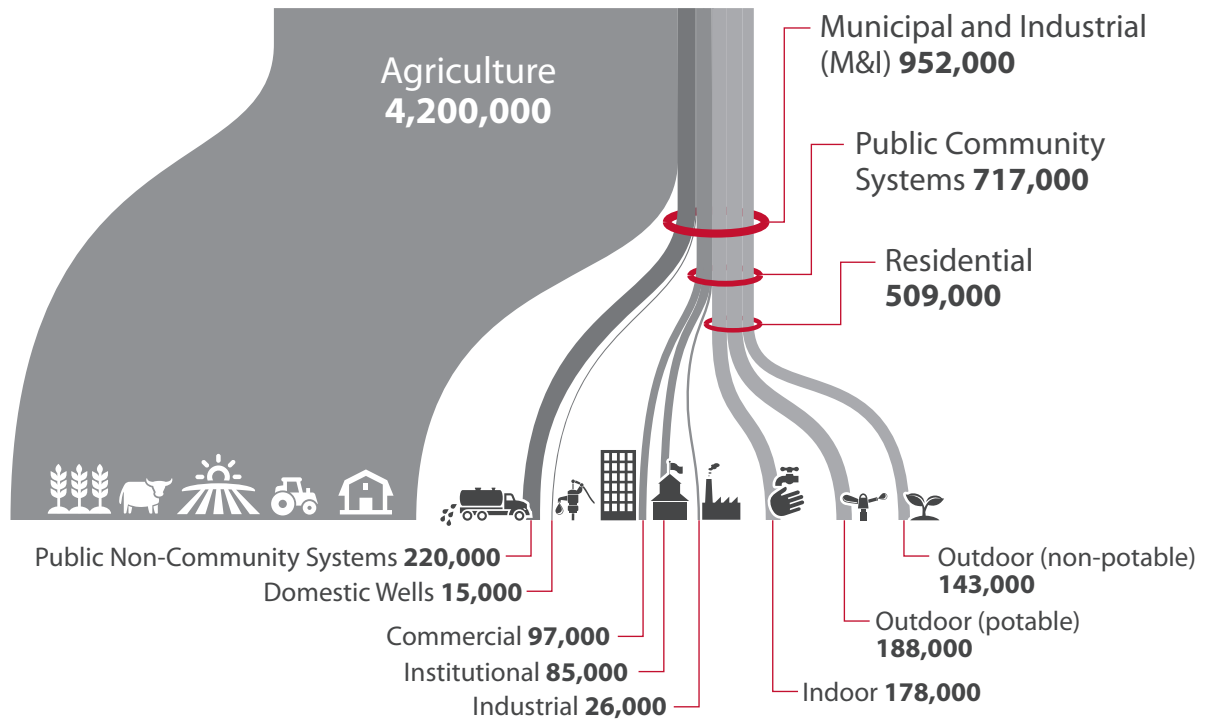


Note: Figures cover five departments with most land: Bureau of Land Management, Forest Service, Fish and Wildlife Service, National Park Service, and Department of Defense.
Source: Congressional Research Service

Aquanomics

Uses of diverted water in Utah

Acre-feet per year



Source: Utah Governor's Office of Management and Budget

Energy a major employer in Utah

Energy industry employment by sector, 2017

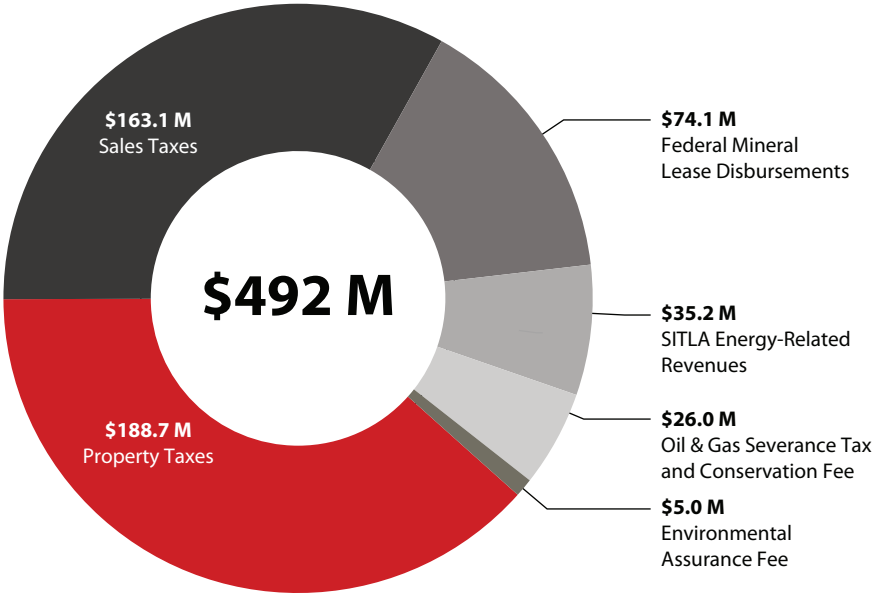
Sector	Jobs
Energy Efficiency.....	14,626
Oil & Gas Development and Production.....	7,999
Solar.....	6,170
Electricity Distribution	2,602
Energy Distribution	1,710
Coal Mining.....	1,496
Electricity Generation	1,188
Oil & Gas Refining.....	1,223
Energy Trade.....	809
Mining Machinery Manufacturing	601
All other / nondisclosed.....	90
Total.....	38,514

Note: Energy efficiency jobs are those where workers spend at least half of their time on energy efficiency-related tasks.

Sources: Utah Department of Workforce Services; Bureau of Labor Statistics, Quarterly Census of Employment and Wages; Bureau of Economic Analysis; National Association of State Energy Officials; Energy Futures Initiative; Solar Foundation; Energy Fuels

Energy a major source of revenue for Utah

Major energy-related state and local revenue in Utah, 2017

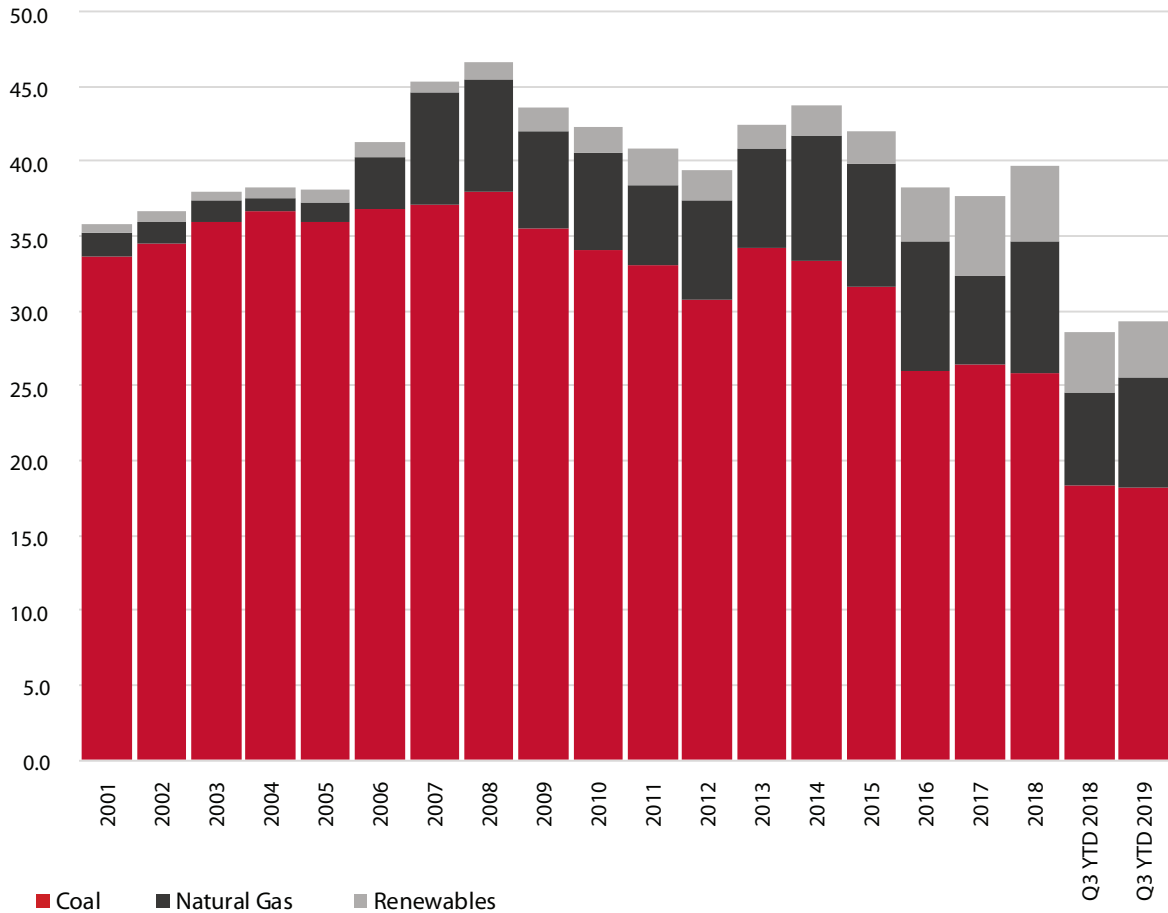


Notes: Sales taxes comprise estimated state and local taxes collected on energy-related business investment and municipal energy sales and use taxes. Oil and gas severance tax and conservation fee includes environmental assurance fee revenues. All data are for calendar year 2017.
Sources: U.S. Department of the Interior, Office of Natural Resources Revenue; Utah State Tax Commission; State of Utah School and Institutional Trust Lands Administration

Renewables' share of generation growing

Electricity generation in Utah by fuel type

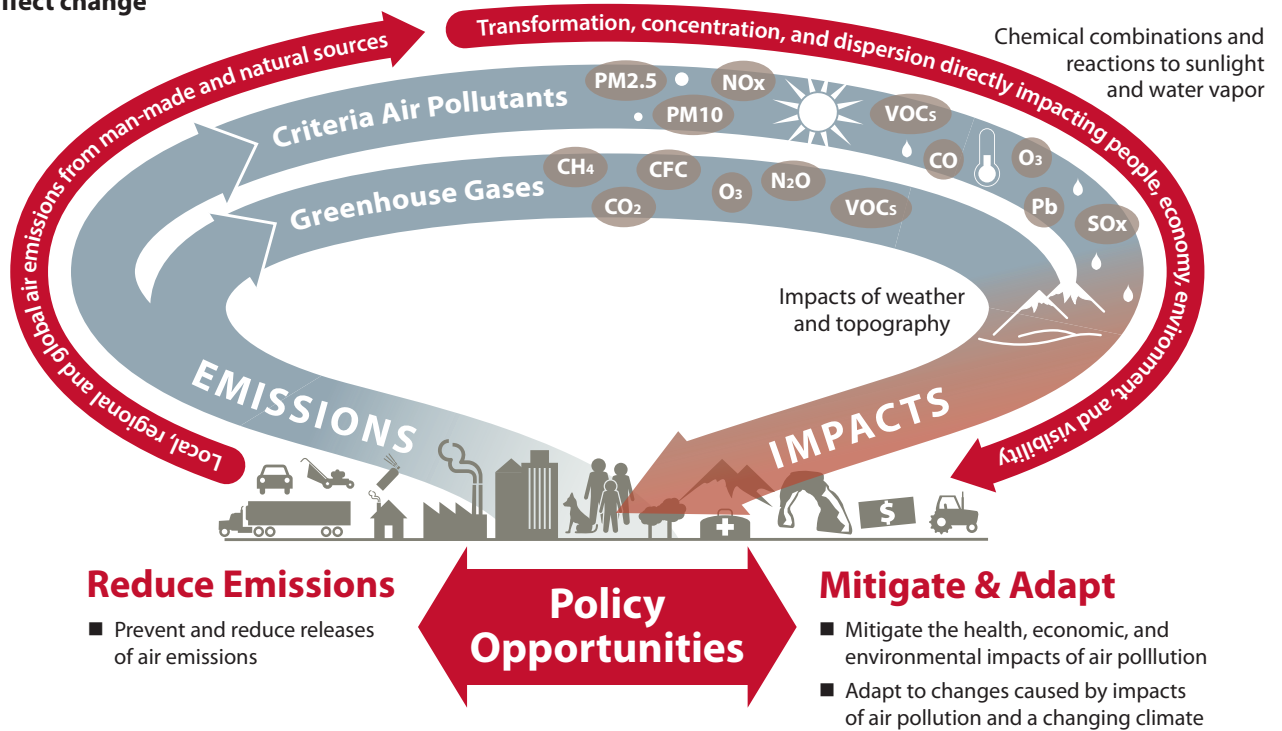
Thousand gigawatt hours



Note: Natural gas includes petroleum liquids and other gases, which represented 0.5% of the category in 2018.
 Source: U.S. Energy Information Administration

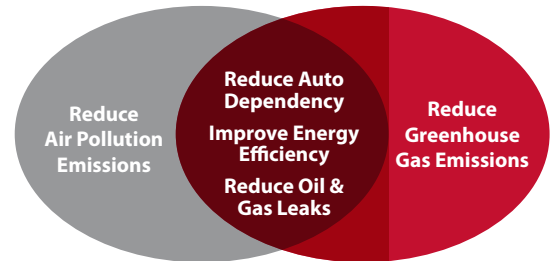
From emissions to impacts

How policymakers can affect change



The air quality/changing climate connection

Reducing air emissions throughout Utah benefits both air quality and changing climate issues. Some emissions-reduction strategies, such as those in the center of the diagram, directly address this connection, improving air quality and the climate.



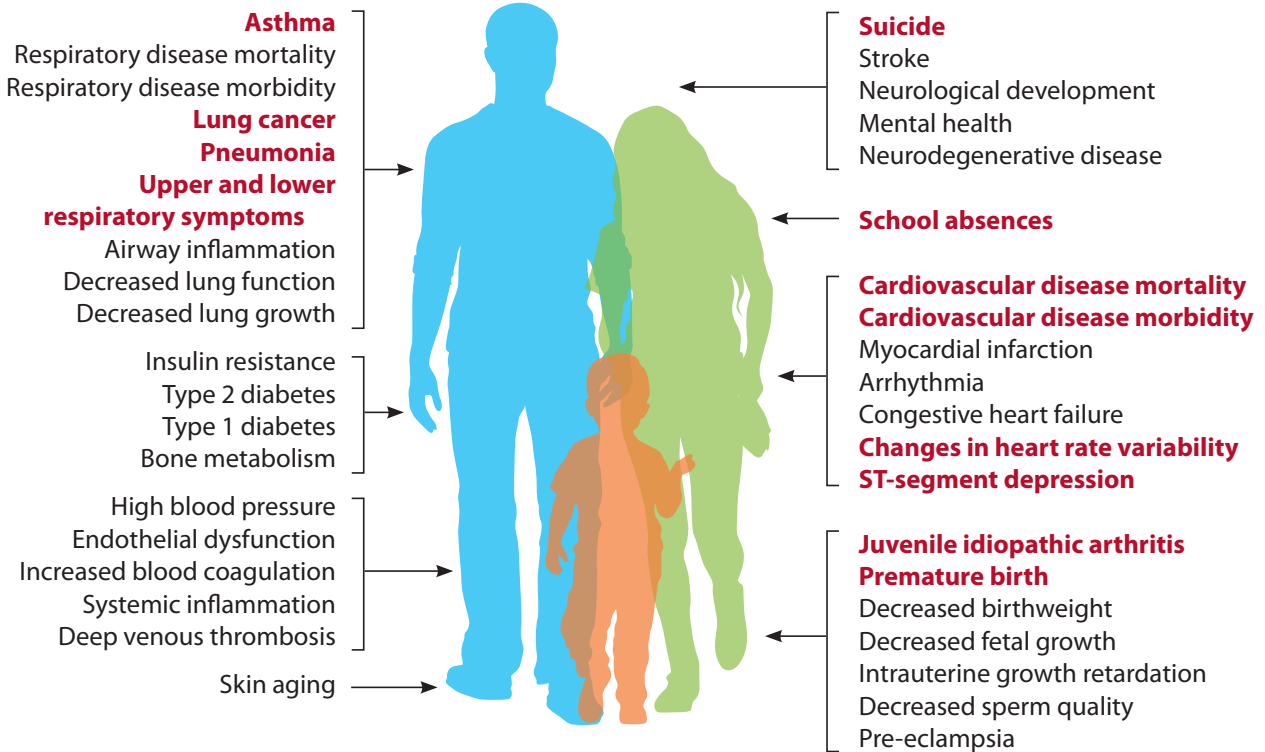
Source: Kem C. Gardner Policy Institute

Emissions impact everyone

Health effects of air emissions and pollutants

Recent Utah-based health studies highlighted in **red**

Air pollutants, individually and in combinations, can both cause and worsen health conditions



Source: Adapted from Thurston et al., 2017

Utah's mental health crisis

Mental health in Utah: key statistics



Close to one in five adults experience poor mental health.

Suicide

is the leading cause of death for Utahns ages 10 to 17.

Over
100,000
adults in Utah experience Serious Mental Illness (SMI).

SAFEUT chats increased by more than

54%

between January 2018 and January 2019, and SAFEUT tips increased by almost

100%

Veteran suicides

account for **13%** of all suicides in Utah.

Almost

40%

of Utah's depressed youth age 12–17 did not receive treatment for depression.

Over half of Utah adults with mental illness did not receive mental health treatment or counseling.



About
15%
of new mothers experience postpartum depression symptoms.

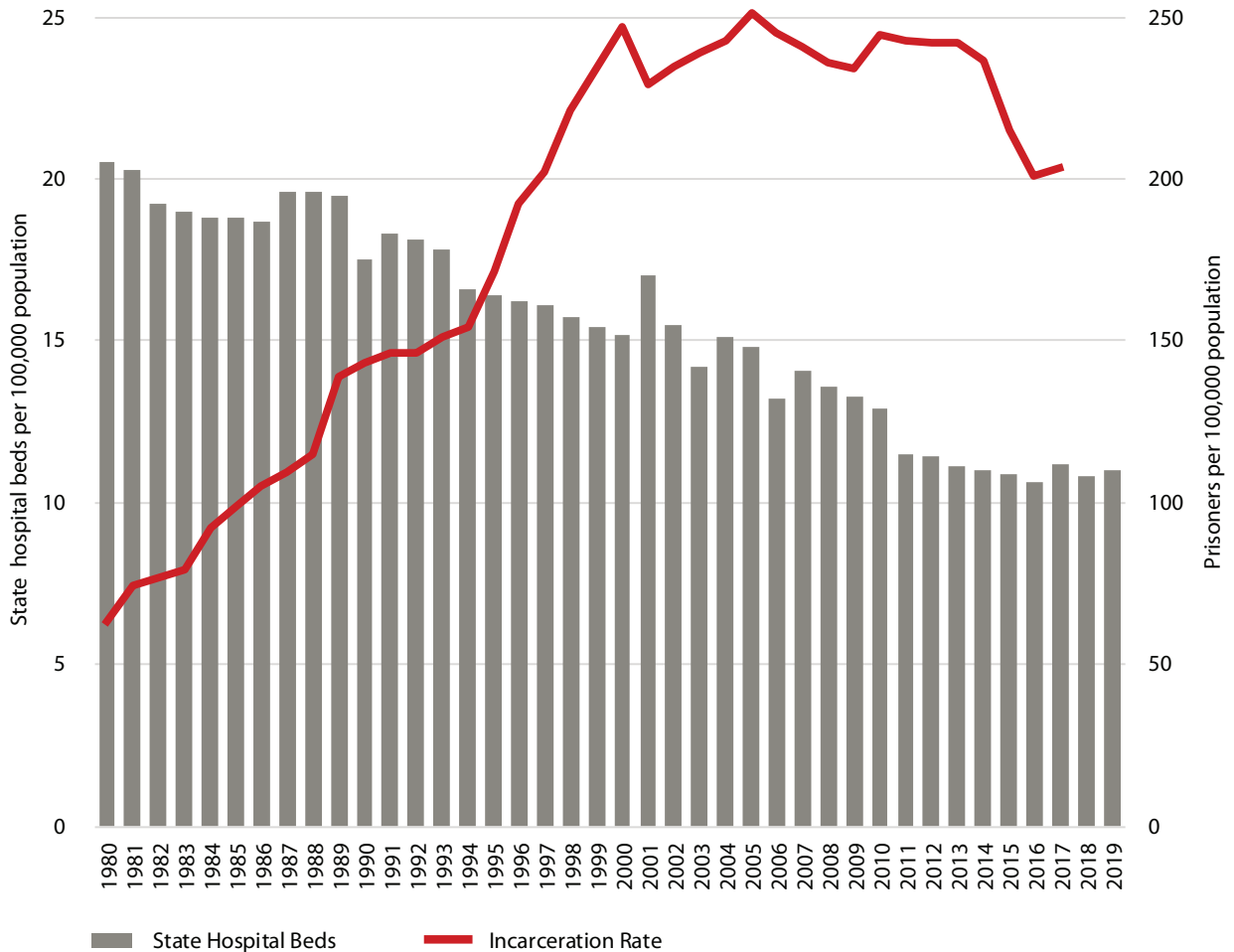
▼
The percent increases to
21%
for low-income mothers.

Source: Kem C. Gardner Policy Institute

A need unmet?

State mental health hospital beds and incarcerated population in Utah, 1980-2019

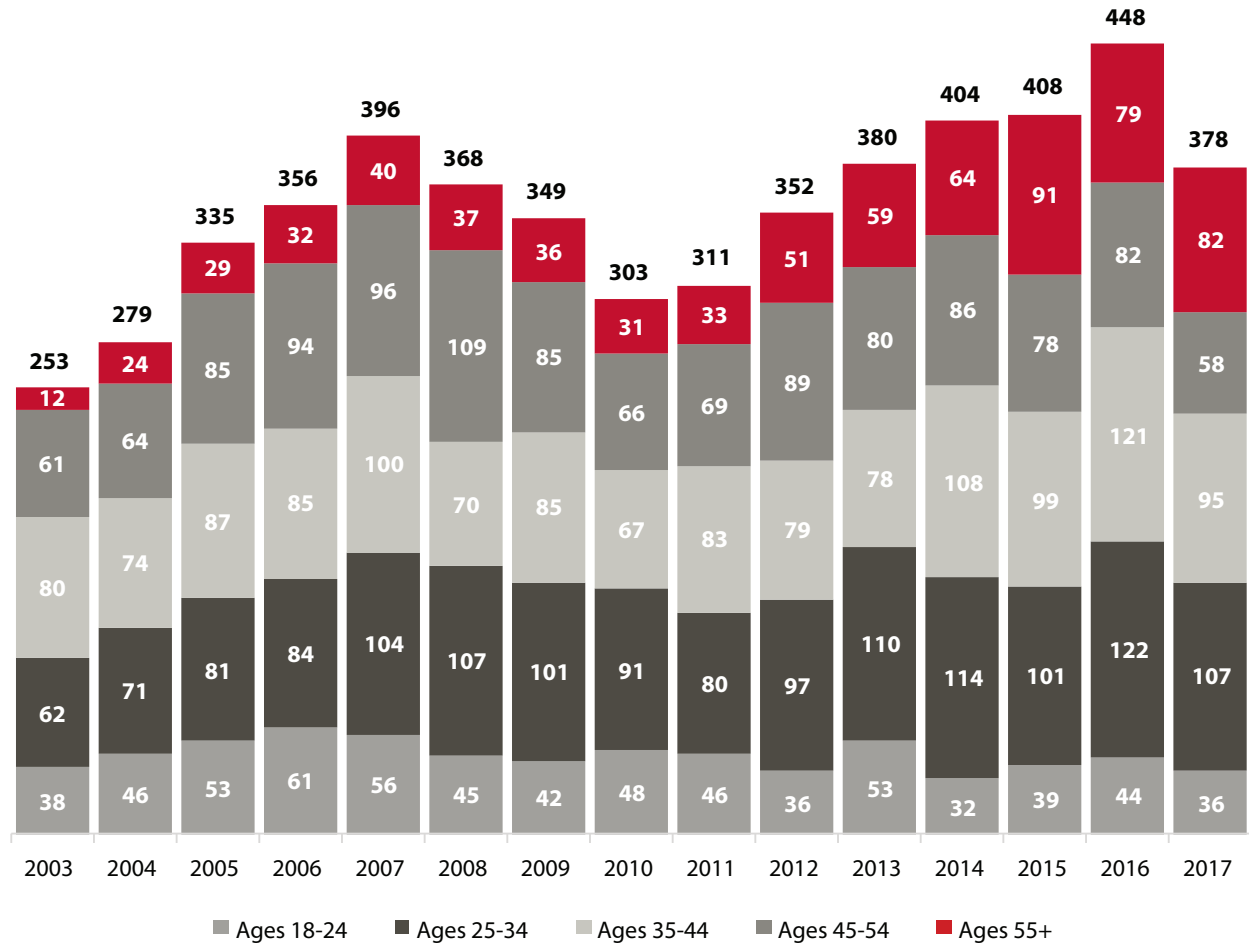
Rates per 100,000 people



Source: Utah Department of Human Services and U.S. Bureau of Justice

The problem of our age for all ages

Number of opioid deaths in Utah by age group, 2000–2017



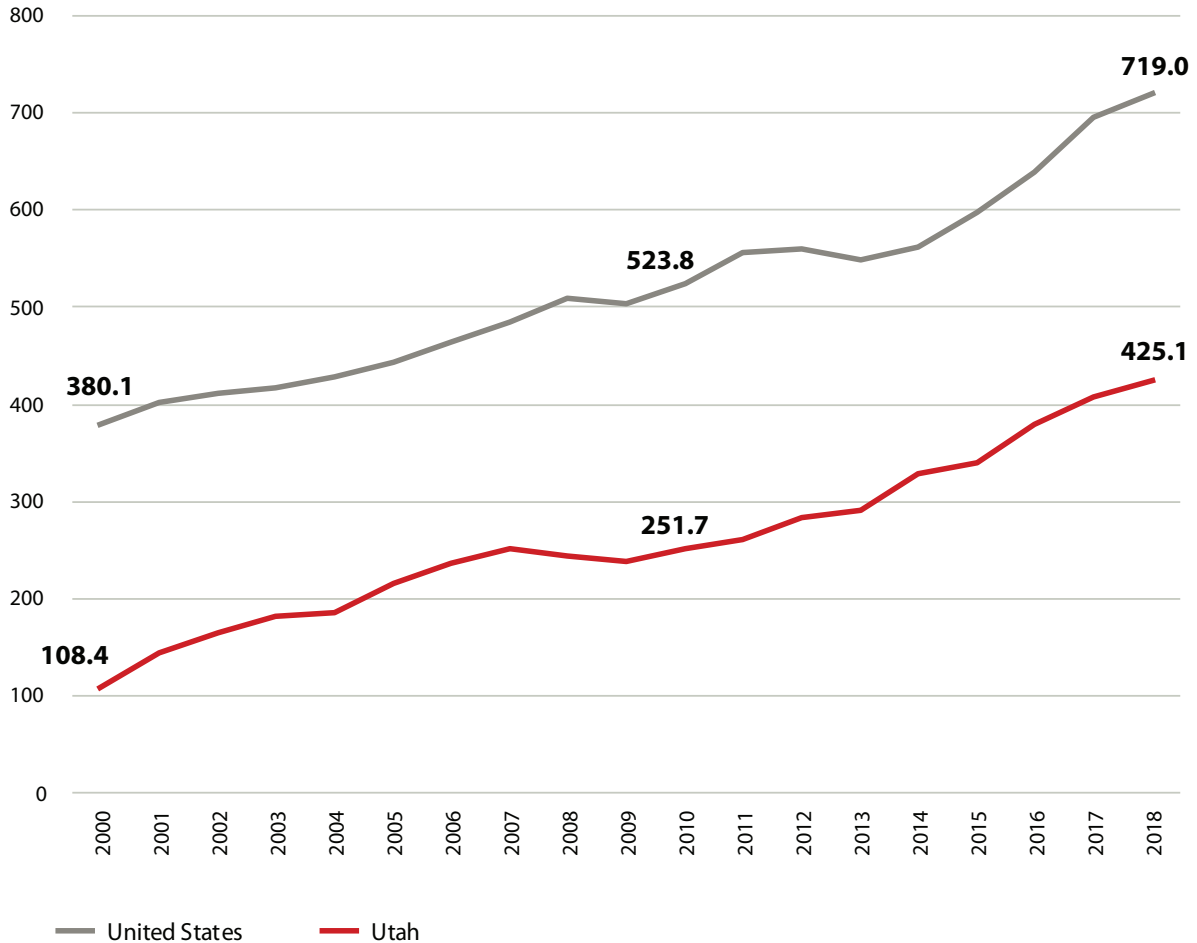
Note: Undetermined and unintentional opioid deaths only.

Source: Utah Death Certificate Database, Utah Medical Examiner Database, US Census Bureau

STDs on the rise

Rates of sexually transmitted diseases in Utah and the United States

Cases of Chlamydia and Gonorrhea per 100,000 people

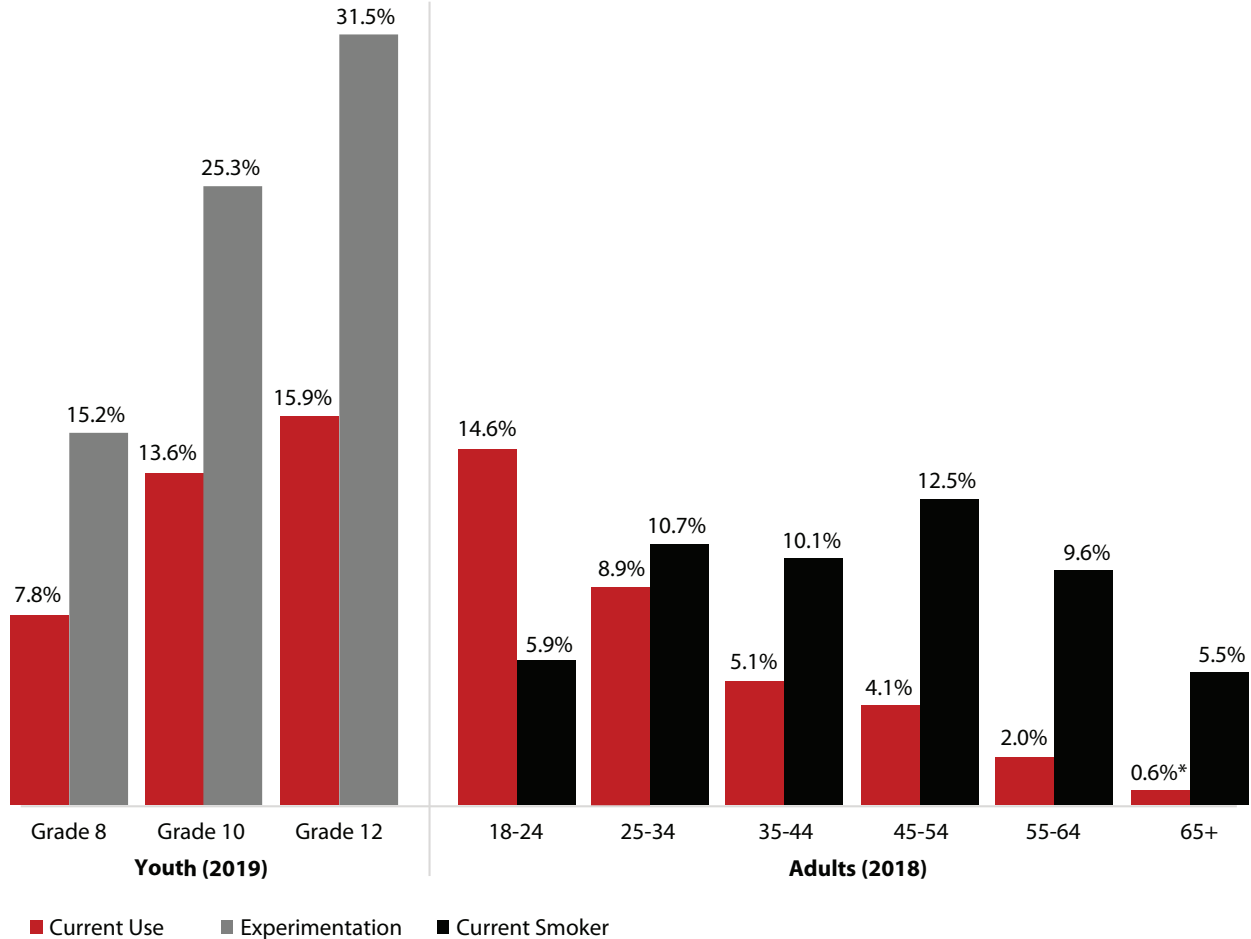


Source: Utah Department of Health, Bureau of Epidemiology

Youth vaping alarmingly high

Electronic cigarette or vaping use and experimentation in Utah by grade and age

Percent of population

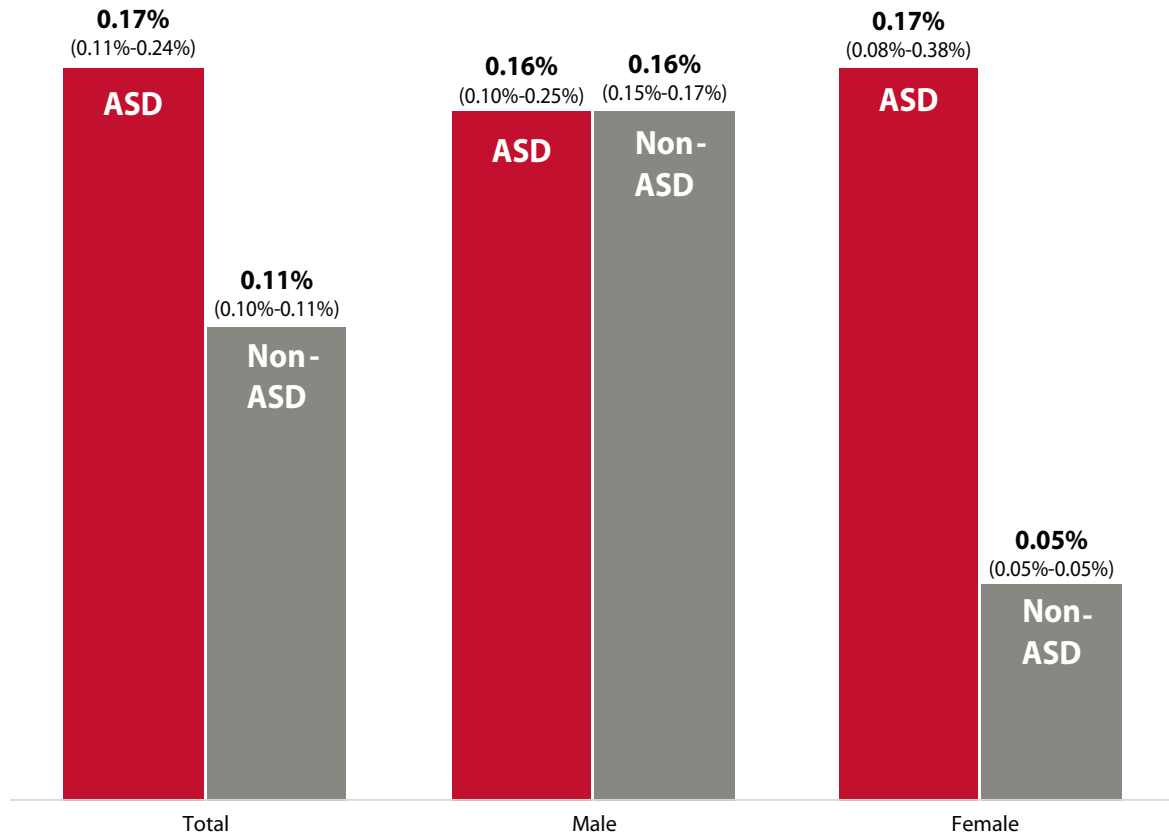


*Use caution in interpreting; the estimate has a coefficient of variation > 30% and is therefore deemed unreliable by Utah Department of Health standards.
 Notes: Experimentation is defined as "ever tried"; current use is defined as use in the past 30 days. Current smoker is defined as currently using "every day" or "some days."
 Sources: Utah Prevention Needs Assessment Survey, Utah Behavioral Risk Factor Surveillance System, Office of Public Health Assessment, Utah Department of Health

Suicide incidence high for females with ASD

Cumulative incidence of suicide in Utah populations with and without Autism Spectrum Disorder (ASD), 2013-2017

With 95% Confidence Intervals



Source: Kirby, A. V., Bakian, A. V., Zhang, Y., Bilder, D. A., Keeshin, B. R., & Coon, H. (2019). A 20-year study of suicide death in a statewide autism population. *Autism Research*, 12(4), 658–666.

Many languages, one home

Non-English primary languages spoken at home in Utah

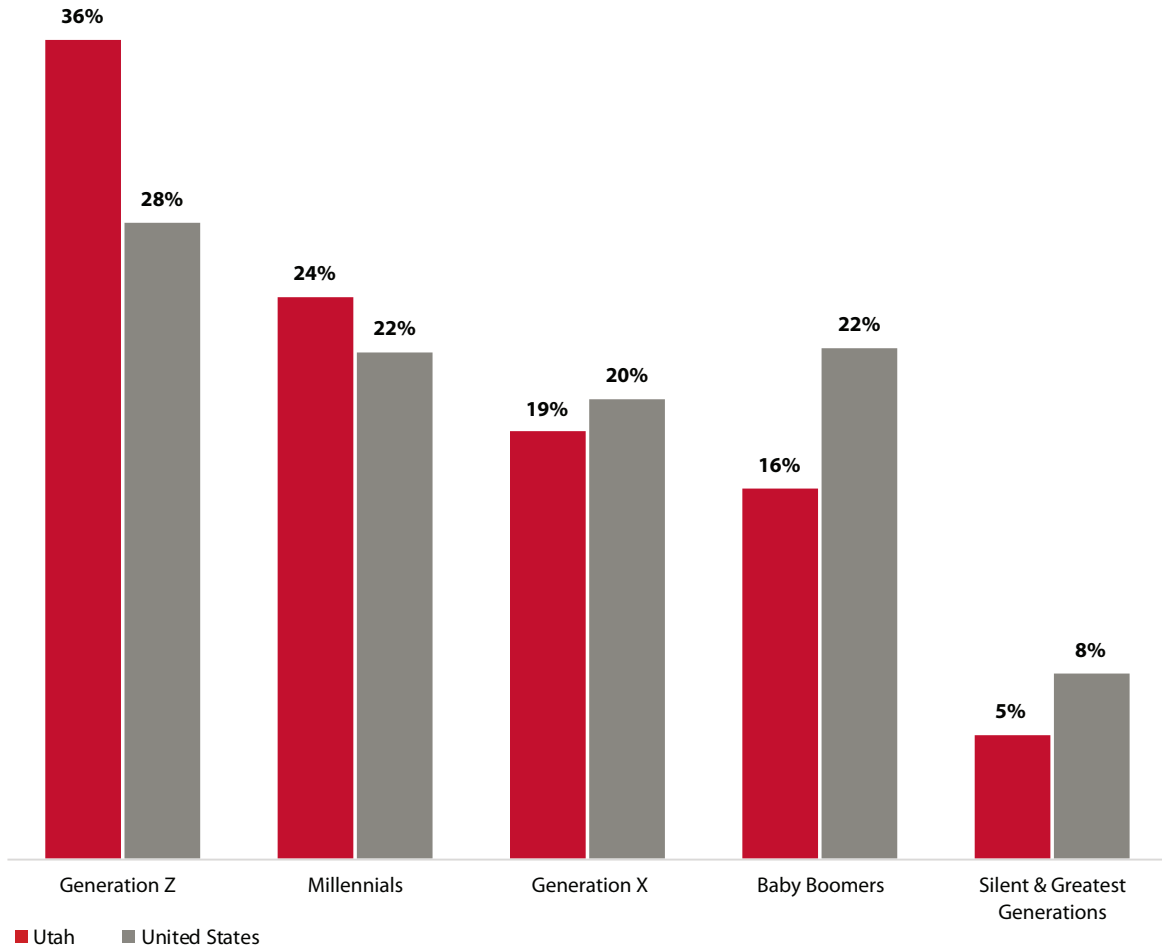


Source: U.S. Census Bureau

Ok Boomer?

Generations in Utah and the United States

Share of population from each generation

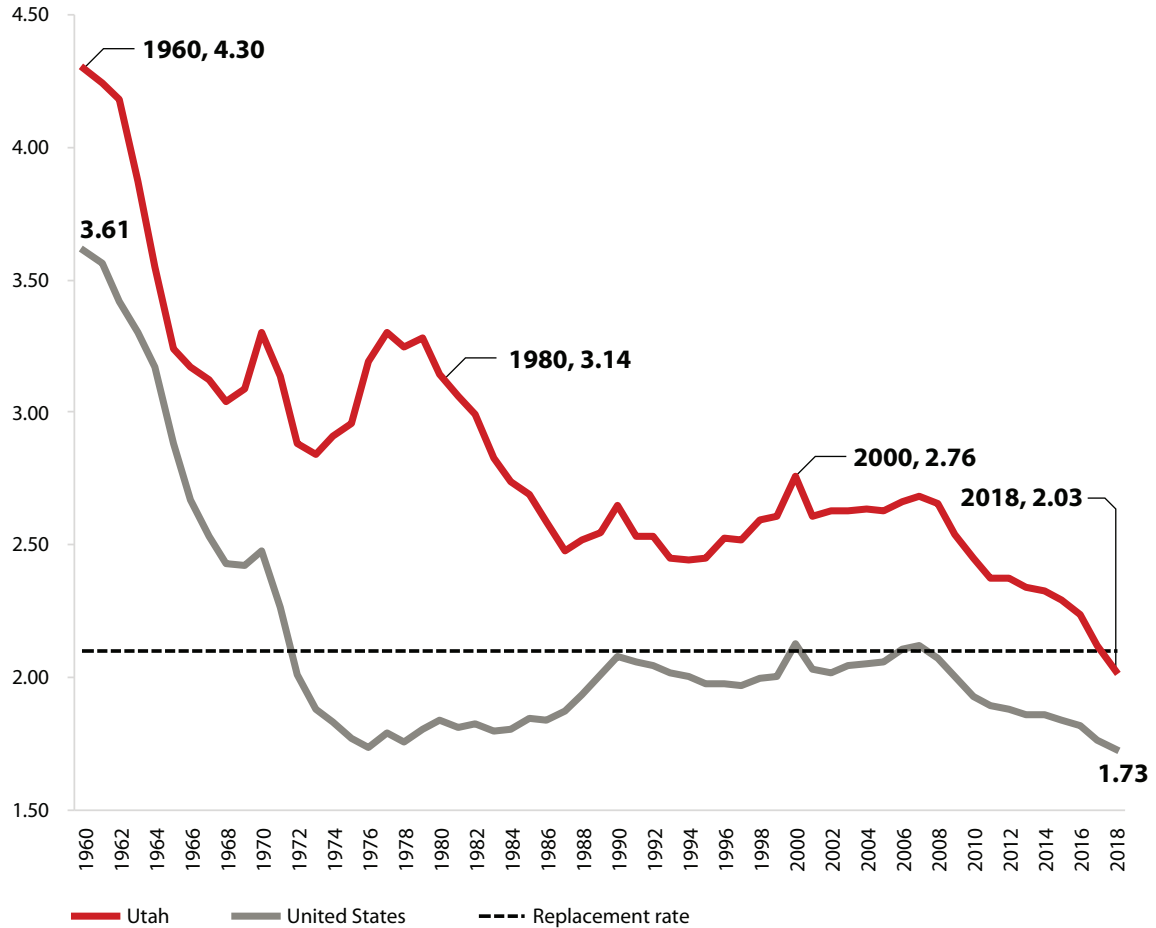


Note: 2018 data.

Source: Kem C. Gardner Policy Institute analysis of U.S. Census Bureau and Utah Population Committee data

The birth of a new normal

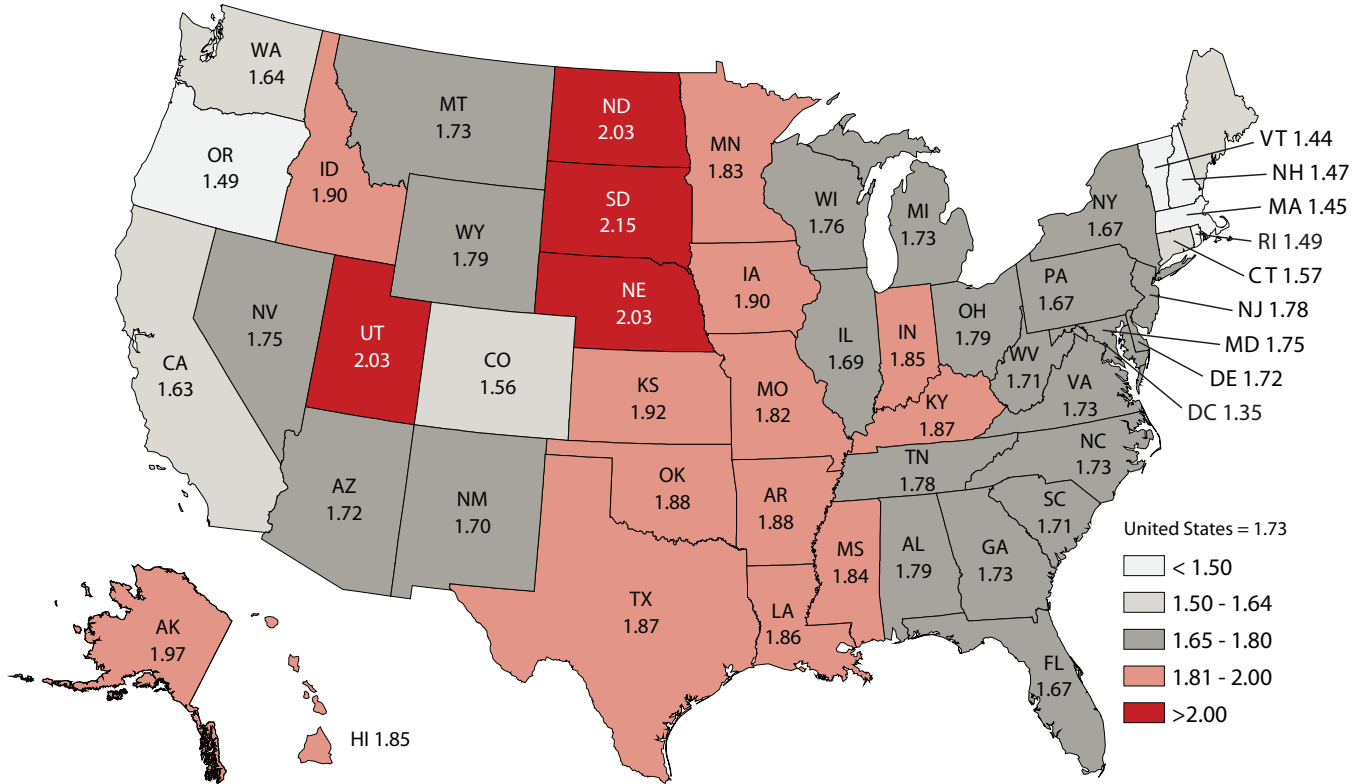
Total fertility rates in Utah and the United States over time



Notes: The total fertility rate is the the average number of children a woman would have assuming that current age-specific birth rates remain constant throughout her/ their childbearing years. The replacement rate is the total fertility rate at which a population exactly replaces itself from one generation to the next, without migration.
Source: National Center for Health Statistics

We're not #1...

Total fertility rates, 2018



Note: The total fertility rate is the the average number of children a woman would have assuming that current age-specific birth rates remain constant throughout her/ their childbearing years.

Source: National Center for Health Statistics National Vital Statistics System

...and here's why

Teen fertility rates, 2018

Births per 1,000 women aged 15-19

State	Rate
Arkansas	30.4
Mississippi	27.8
Louisiana	27.5
Kentucky	27.3
Oklahoma	27.2
West Virginia	25.4
New Mexico	25.3
Tennessee	25.3
Texas	25.3
Alabama	25.2
South Carolina	22.0
Indiana	21.8
Missouri	21.6
Wyoming	20.8
Georgia	20.6
Nevada	20.5
South Dakota*	20.4

State	Rate
Arizona	20.1
Kansas	20.0
Alaska	19.3
District of Columbia	19.3
Ohio	18.9
North Carolina	18.7
Hawaii	17.2
Montana	17.2
Delaware	16.7
Florida	16.7
Nebraska*	16.7
North Dakota*	16.4
Idaho	16.0
Illinois	15.8
Michigan	15.8
Iowa	15.3
Colorado	14.3

State	Rate
Virginia	14.3
Maryland	14.1
Pennsylvania	14.1
California	13.6
Oregon	13.3
Utah*	13.1
Wisconsin	13.0
Washington	12.7
New York	11.7
Rhode Island	11.5
Maine	11.1
New Jersey	10.3
Minnesota	10.2
Vermont	8.8
Connecticut	8.3
New Hampshire	8.0
Massachusetts	7.2

United States = 17.4

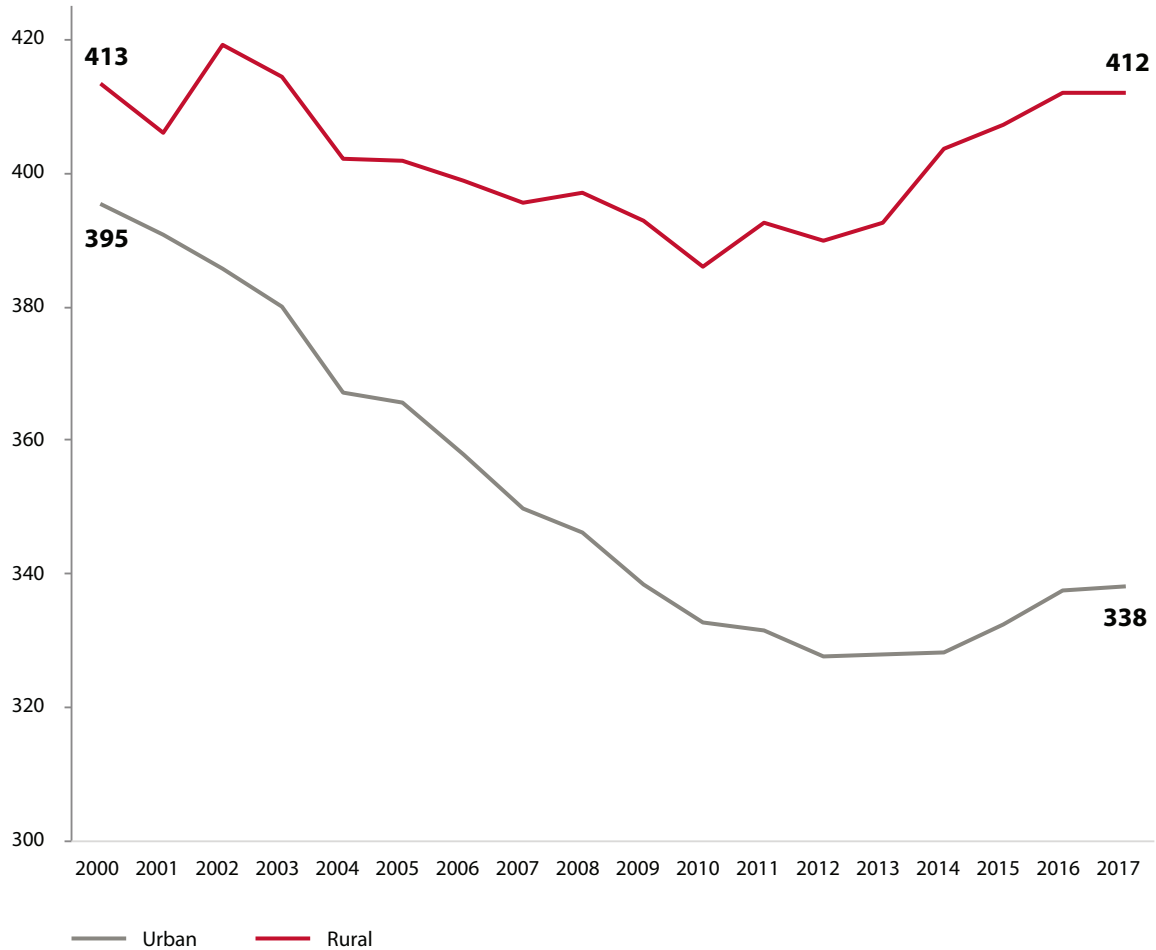
*Total fertility rate > 2.00

Source: National Center for Health Statistics National Vital Statistics System

Another urban-rural divide...

Premature death rates in urban and rural regions in the United States

Deaths of persons aged 75 and younger per 100,000 population



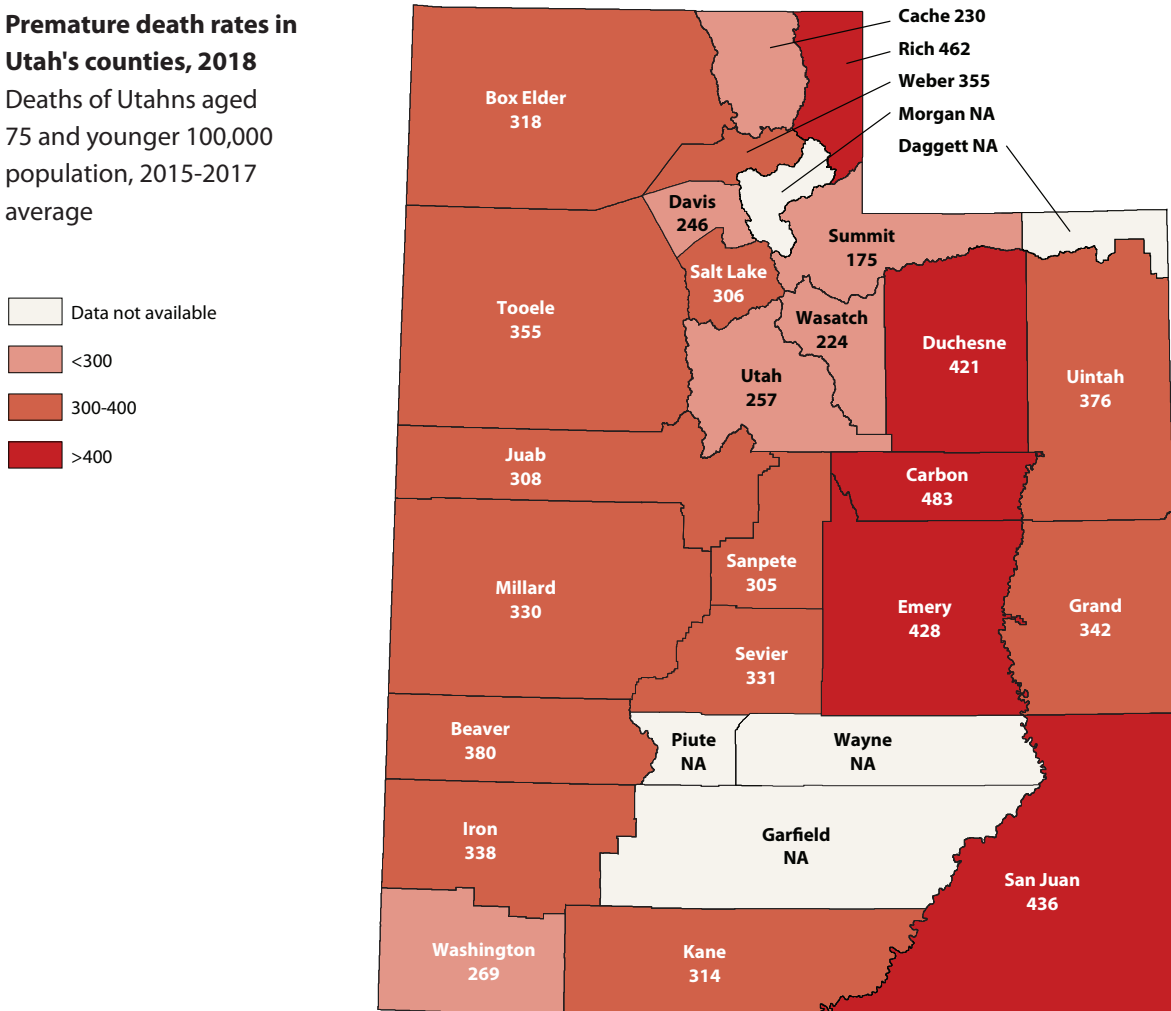
Note: Rural defined as counties with no more than 15 persons per square mile.

Source: Kem C. Gardner Policy Institute analysis of FRED, U.S. Census Bureau, and National Cancer Institute Surveillance, Epidemiology, and End Results Program data

...and another

Premature death rates in Utah's counties, 2018

Deaths of Utahns aged 75 and younger 100,000 population, 2015-2017 average



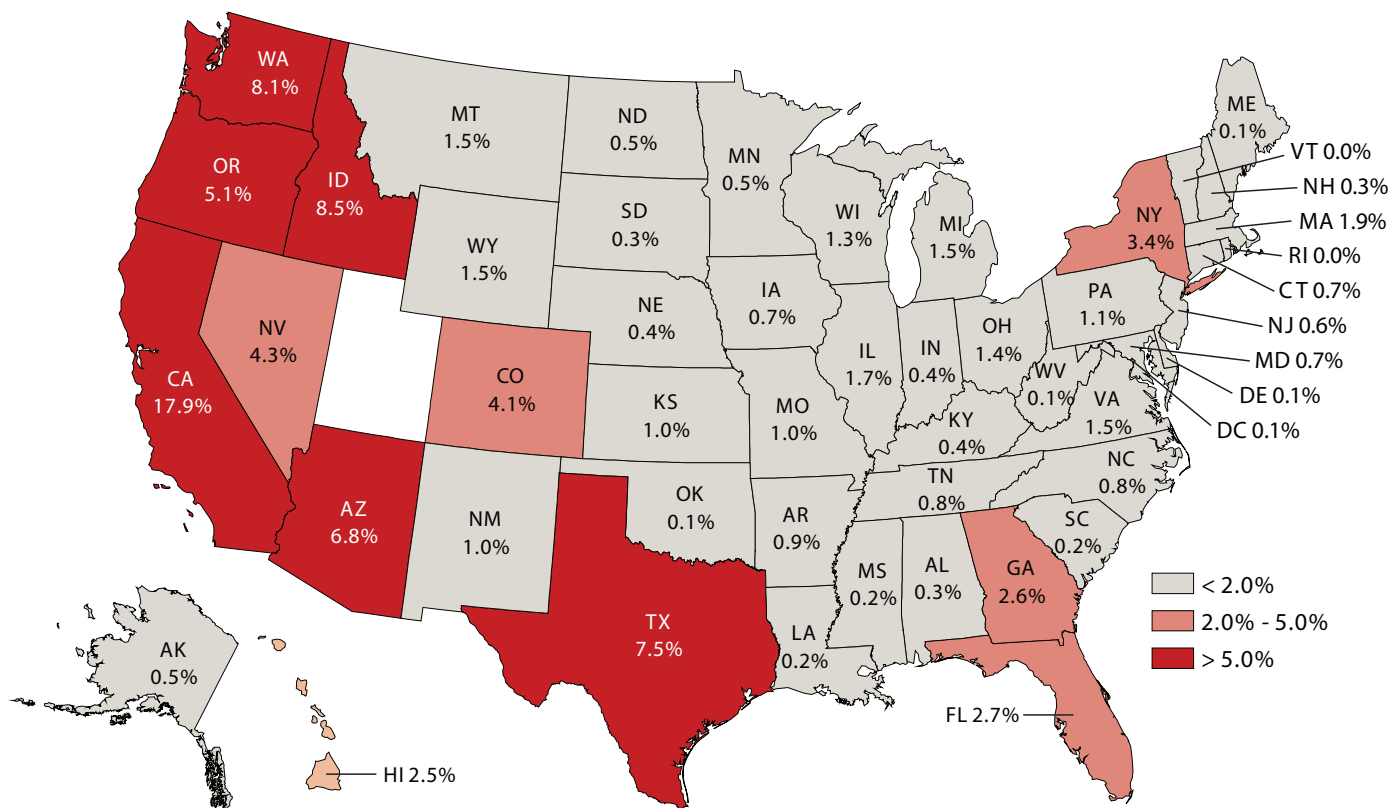
Note: Rates are age-adjusted, i.e. they represent the weighted averages of the age-specific death rates, where the weights represent a fixed population by age. This allows for a comparison of relative mortality risk among counties. Age-adjusted rates should be viewed as relative indexes rather than as direct or actual measures of mortality risk.

Source: Kem C. Gardner Policy Institute analysis of FRED, U.S. Census Bureau, and National Cancer Institute Surveillance, Epidemiology, and End Results Program data

This is the place

Where Utah's domestic migrants come from

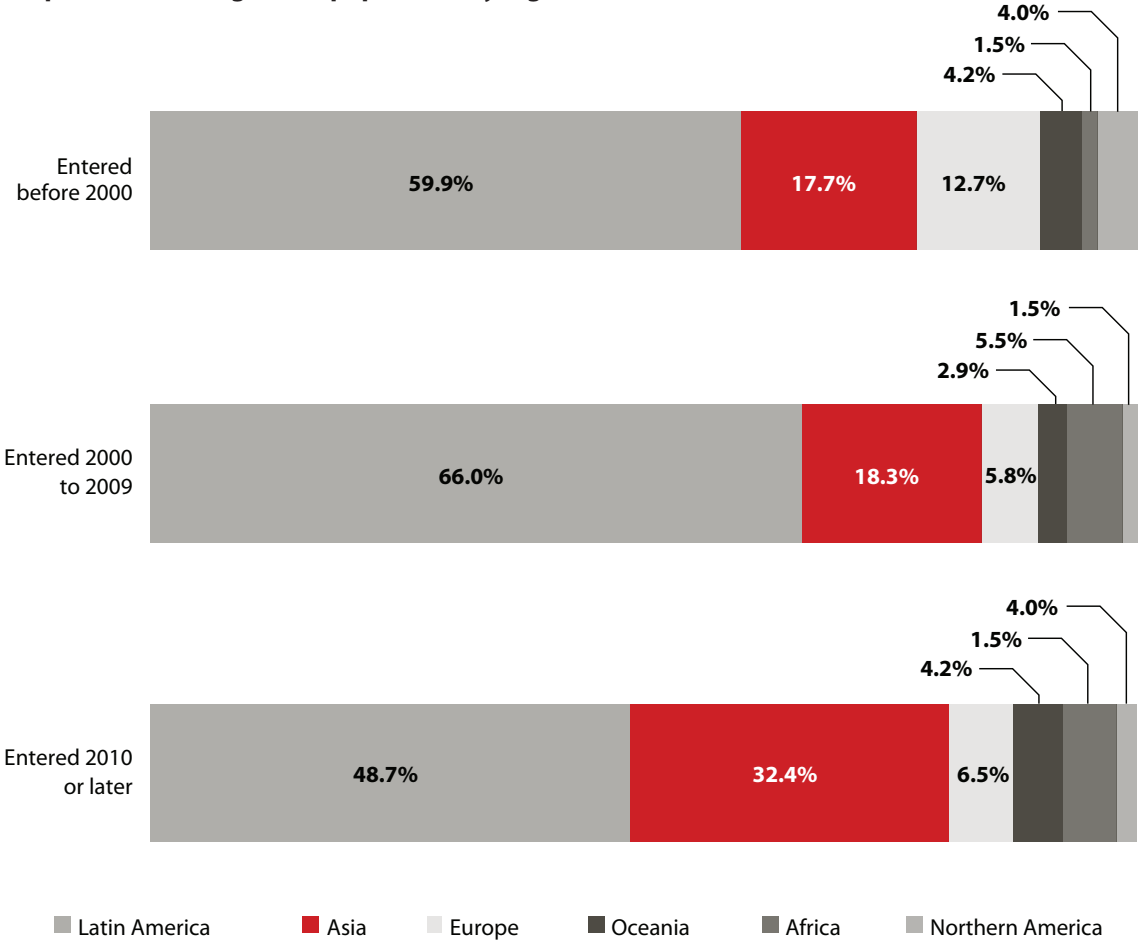
Percent of all domestic migrants to Utah by state, 2017-2018



Source: U.S. Census Bureau American Community Survey 2018 1-Year Estimates

Increasing share of foreign born Utahns from Asia

Makeup of Utah's foreign born population by region of birth, 2018

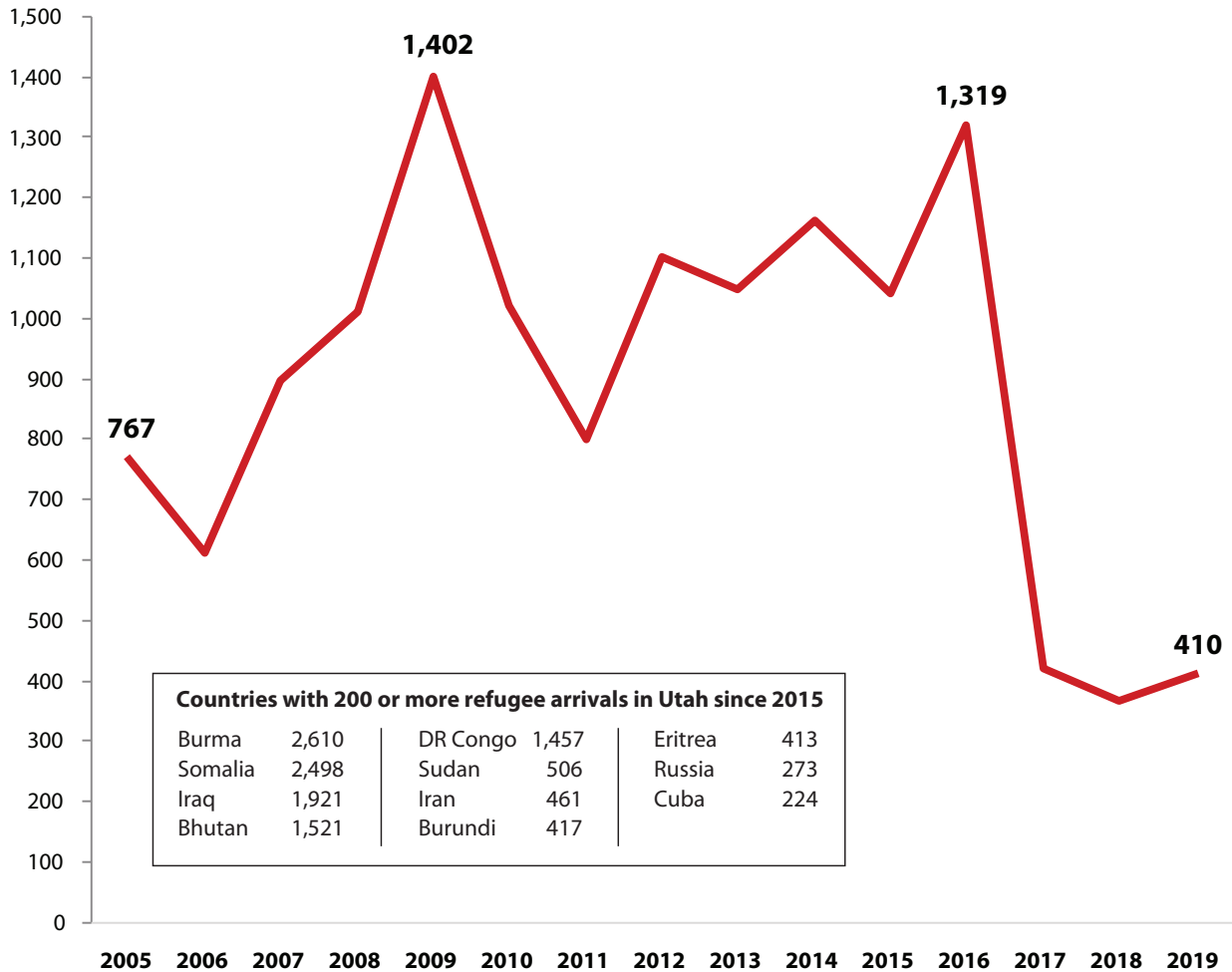


Source: U.S. Census Bureau American Community Survey 2018 1-Year Estimates

"I encourage you to allow us to accept more international refugees in Utah."

-Letter from Governor Gary R. Herbert to President Donald J. Trump, October 2019

Refugee arrivals in Utah, 2005-2019

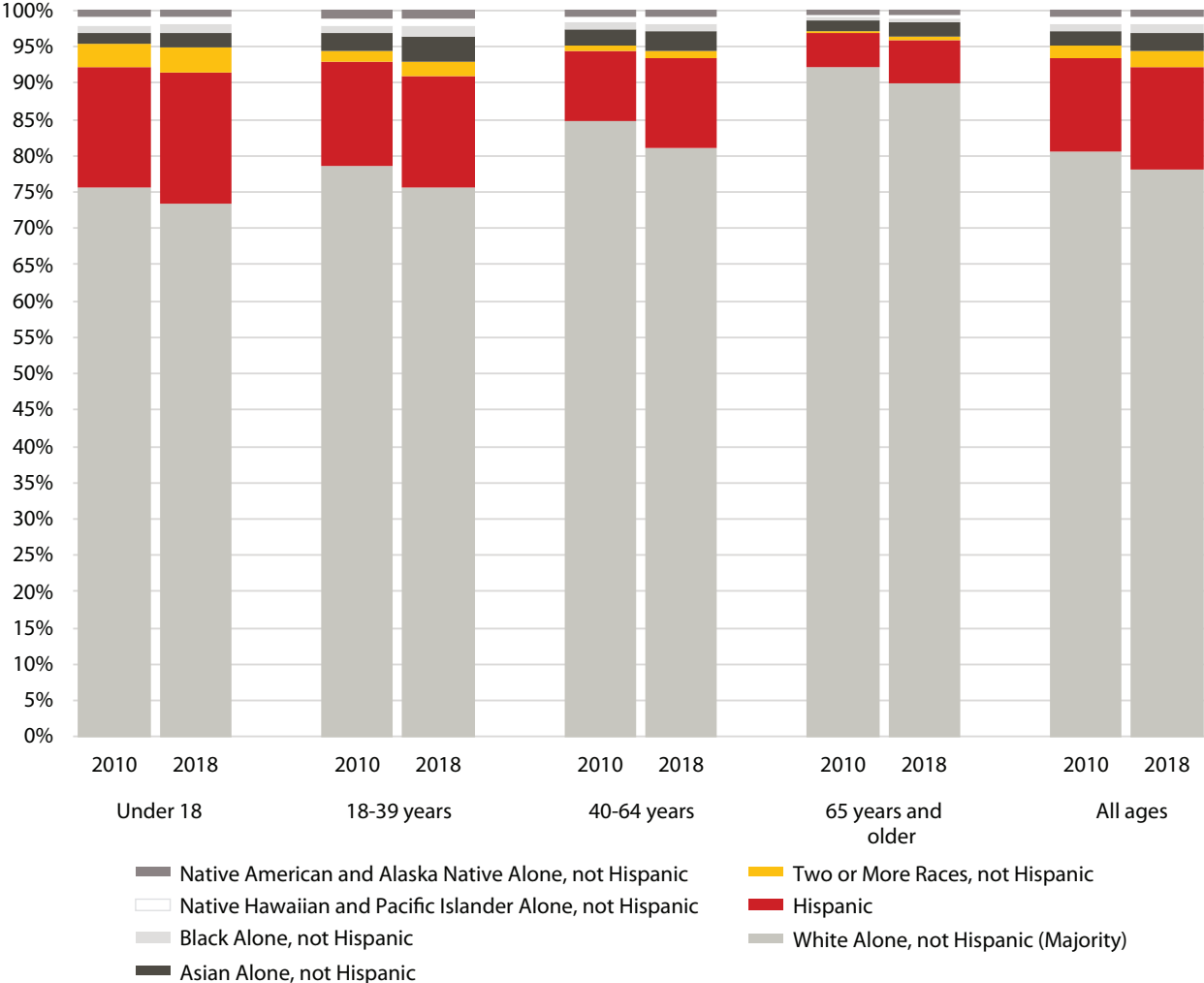


Source: U.S. Department of State Worldwide Refugee Admissions Processing System

Diversity driven by younger population

Distribution of race and Hispanic origin by age group in Utah

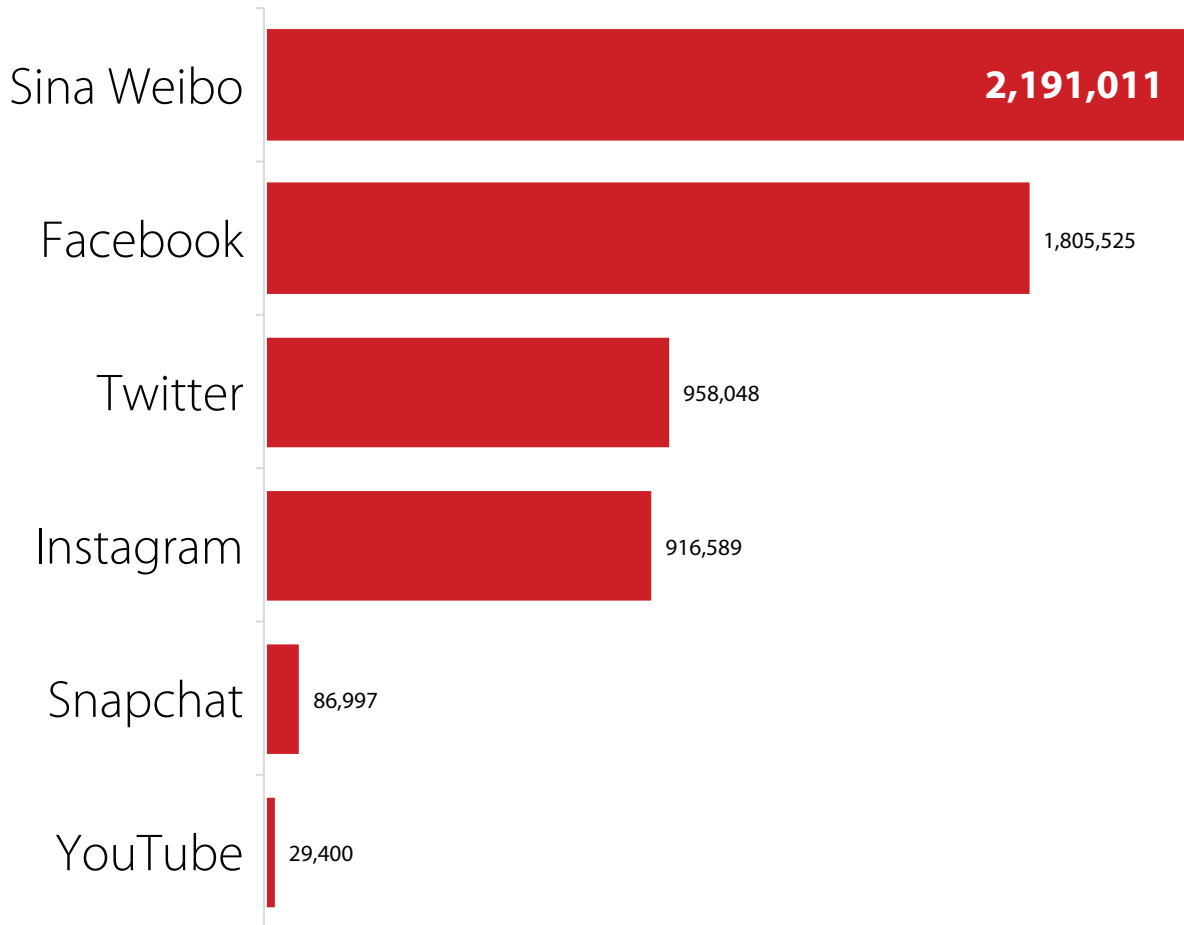
Share of total population



Source: Kem C. Gardner Policy Institute

Sina Weibo?

Global social media followers of the Utah Jazz in 2019

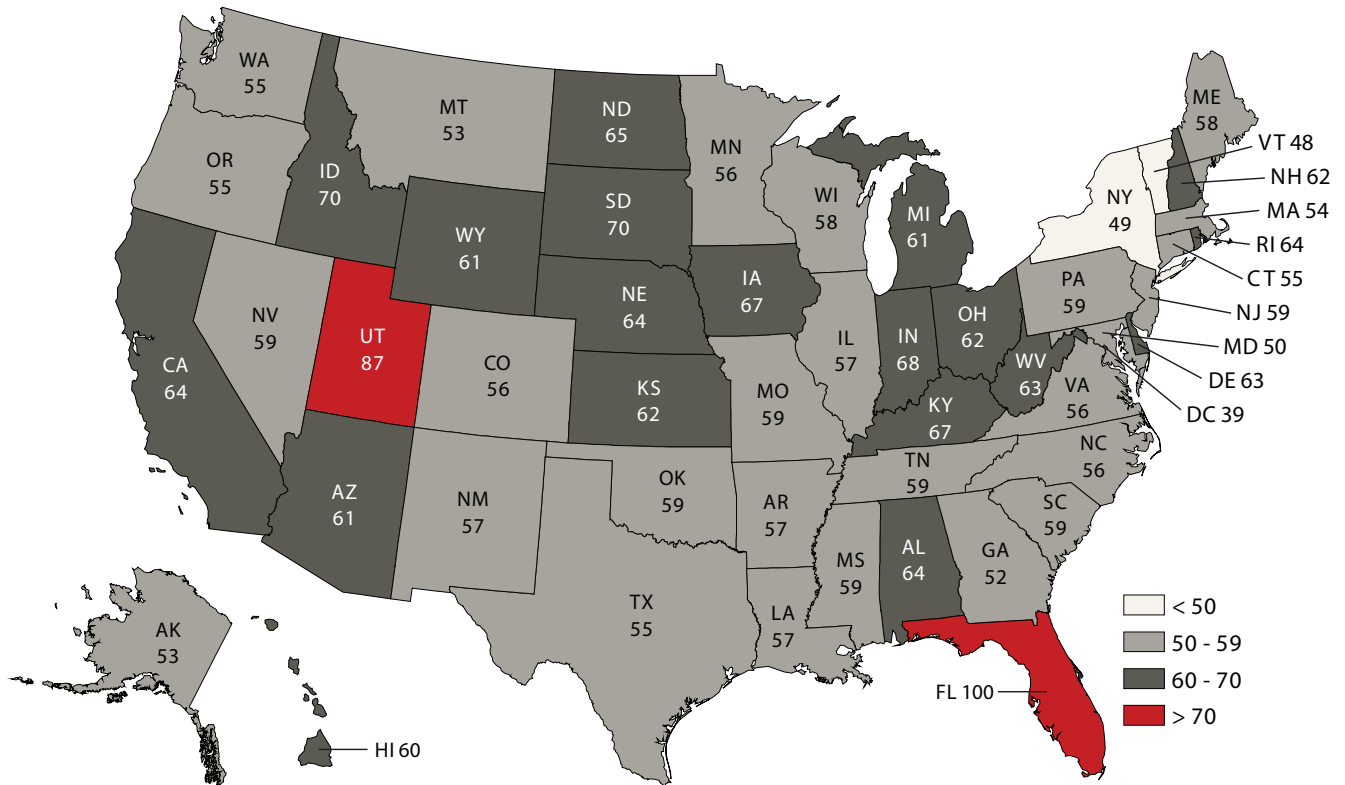


Note: Like Twitter, Sina Weibo is a Chinese microblogging website.
Source: Larry H. Miller Sports & Entertainment

Utah: where dreams come true

Disney+ search popularity on Google in November, 2019

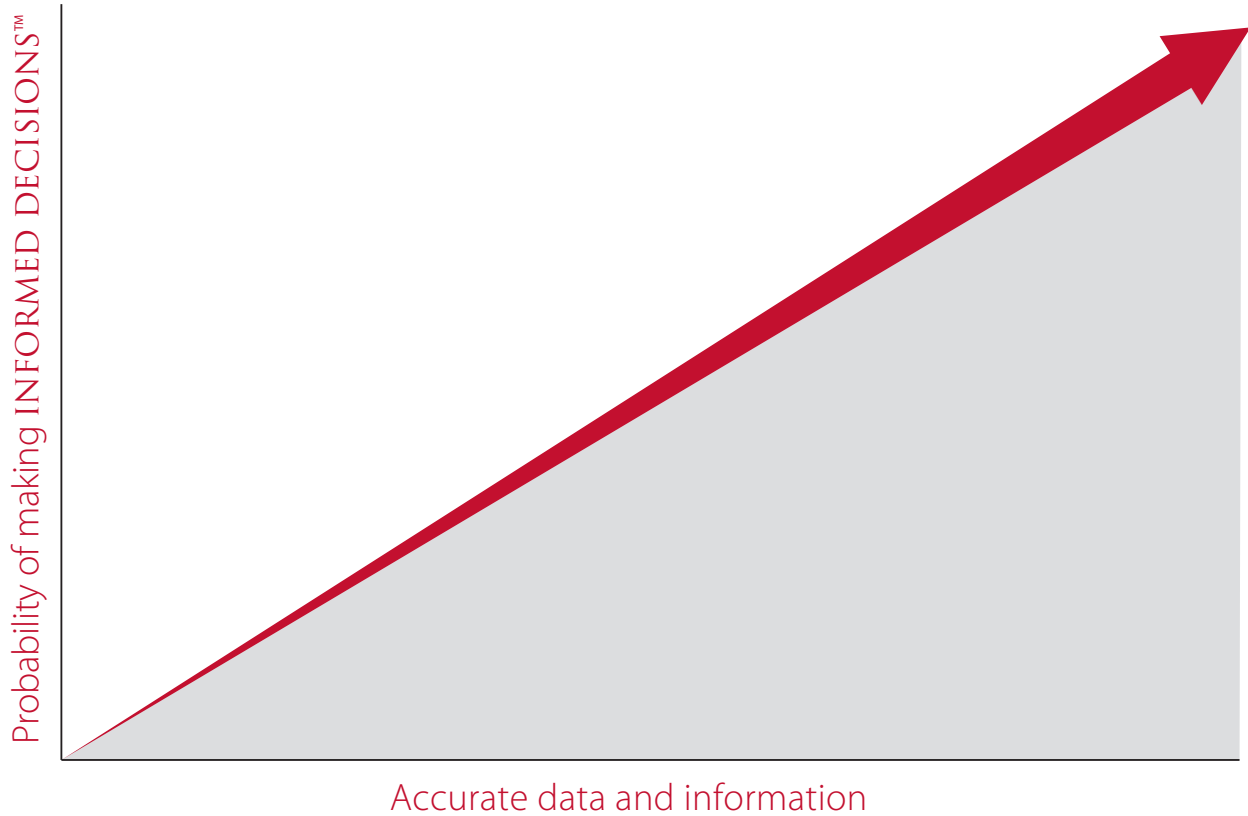
Search popularity score



Note: Search popularity scores are calculated on a scale from 0 to 100, where 100 is the location with the most popularity as a fraction of total searches in that location, a value of 50 indicates a location which is half as popular.

Source: Google Trends

The whole point



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