2015

ECONOMIC REPORT *to the* GOVERNOR

PREPARED BY THE
UTAH ECONOMIC COUNCIL

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

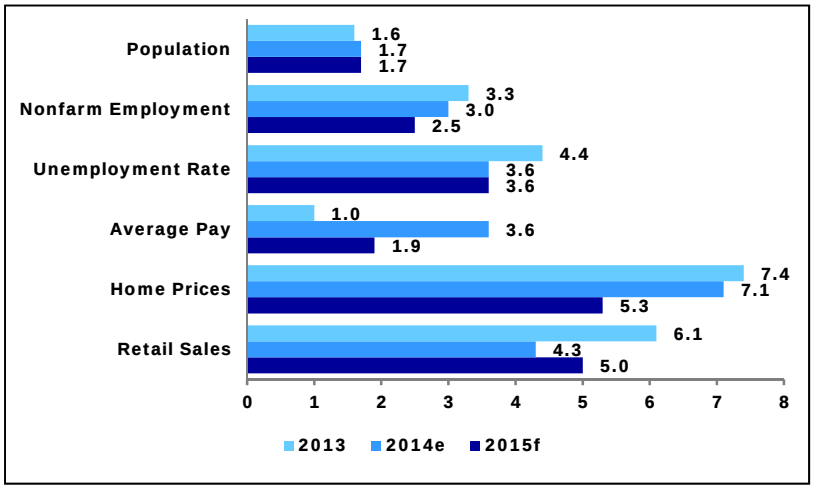
2015 Economic Report to the Governor Excerpts

Outlook

Overview of the Economy—Utah has recovered more rapidly than the nation after the Great Recession. For the U.S., employment grew 1.8 percent in 2014, compared to 3.0 percent for Utah. While employment increased during 2014, Utah's unemployment rate also improved to 3.6 percent, lower than the rate of 4.4 in 2013. Though housing stabilized, with16,000 building permits issued in 2014, home-building is not leading the economy as it does during a typical recovery.

Outlook 2015—Utah's employment is expected to grow at 2.5 percent, below its long-term average, while the nation remains at 1.8 percent. If wage growth accelerates in the early months of 2015 then employment growth could increase. The unemployment rate will remain stable at 3.6 percent. The residential construction sector will see modest improvement with dwelling unit permits expected to increase to 17,500.

Utah Economic Indicators: 2013-2015



Source: Council of Economic Advisors' Revenue Assumptions Working Group e = estimate f = forecast

Highlights

Personal Income—Utah's total personal income in 2014 was an estimated $110.7 billion, a 4.1 percent increase from $106.3 billion in 2013. Utah's estimated 2014 per capita income was $37,532, up 2.4 percent from the 2013 level of $36,640. These 2014 growth rates are markedly slower than the average annual state growth rates of 6.7 percent for total personal income and 5.2 percent for per capita income during the 2011 and 2012 period. However, Utah's slowdown has been slightly less pronounced than that of the U.S. economy as a whole during the 2011-2013 period. Utah personal income is expected to increase by 4.7 percent in 2015, on par with projected growth rates for the U.S. economy.

Utah Taxable Sales—In 2014, Utah total taxable sales were estimated to increase by 4.0 percent to an estimated $51.4 billion, the fifth consecutive year of growth following two years of decline. Taxable sales in 2014 were estimated to be 7.5 percent higher than pre-recession levels and nearly 27 percent higher than taxable sales in 2009. Growth in the range of 3.9 to 4.5 percent was expected across all three major components (retail sales, business investment purchases, and taxable services) of taxable sales in 2014. Although risks to the projections exist, moderate growth in Utah taxable sales is expected to continue through 2015.

Tax Collections—Total unrestricted state revenues increased 2.1 percent in fiscal year (FY) 2014 following a 7.6 percent increase in FY2013. Tax collections for both sales and income tax, which account for approximately 75 percent of all unrestricted revenue, increased in FY2014. The outlook for tax collections is positive with growth of 3.8 percent in total unrestricted tax revenue expected in FY2015. General Fund revenues are forecast to increase 3.4 percent led by a 4.1 percent increase in sales tax (5.6 percent when earmarks are included). Education Fund revenues are forecast to increase 4.5 percent with income tax revenue increasing 3.3 percent. Transportation Fund revenues are expected to remain relatively flat in FY2015, increasing by only 0.7 percent.

Construction—In 2014, home building construction continued its slow recovery from the Great Recession. Typically, four years after the trough, construction has recovered to about 80 percent of the pre-recession peak. In the current cycle however, the recovery is only about 50 percent of the pre-recession peak, 11,600 single family homes in 2014 versus 21,000 in 2005, despite historically low mortgage rates. The value of permit-authorized construction in Utah was $4.7 billion in 2014, down slightly from $5.0 billion in 2013. This estimate includes the value of residential and nonresidential construction and additions, alterations, and repairs. The value of nonresidential construction fell 11 percent from $1.08 billion to $970 million.

Utah Rankings

Demographic	State Rank	Value	Year
Population Growth Rate	3rd	1.6%	2013
Fertility Rate	1st	2.37	2012
Life Expectancy	10th	80.2	2010
Median Age	1st	30.2	2013
Household Size	1st	3.17	2013
Social Indicators			
Poverty Rate	49th	10.1%	2011-2013
Educational Attainment			
Persons 25+ w/high school degree	9th	91.5%	2013
Persons 25+ w/bachelor's degree	15th	31.3%	2013

Economic	State Rank	Value	Year
Rate of Job Growth	3rd	3.4%	Nov. 2014
Unemployment Rate	4th	3.6%	Nov. 2014
Urban Status	13th	86.7%	2010
Median Household Income	13th	$59,877	2011-2013
Average Annual Pay	37th	$41,790	2013
Per Capita Personal Income	44th	$36,640	2013

Notes: 1. Rankings are based on the most current national data available for all states and may differ from other data
2. Rank is high to low

Employment and Wages

Employment—Total nonfarm employment increased by 38,580 jobs (3.0 percent) in 2014 and is expected to increase by 33,400 jobs (2.5 percent) in 2015.

Unemployment—Utah's 2014 unemployment rate was 3.6 percent, down from 4.4 percent in 2013. In 2014, there were an average of 52,702 unemployed Utahns. The unemployment rate is anticipated to remain at 3.6 percent in 2015.

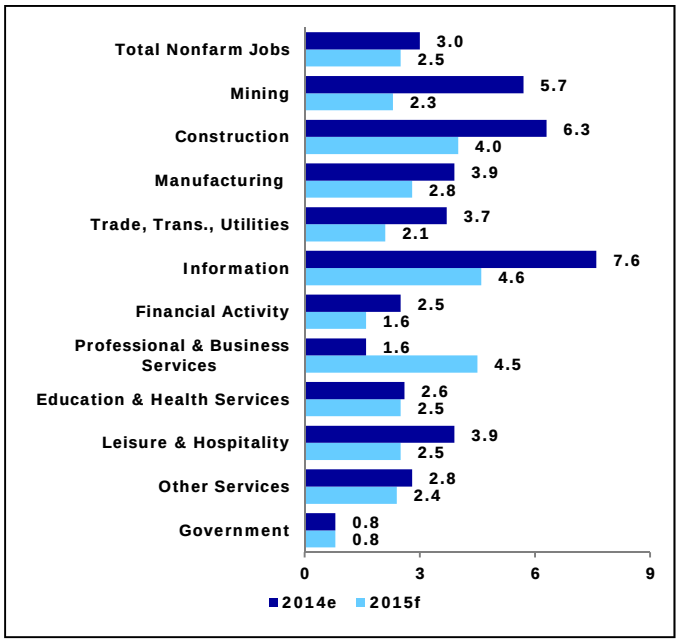
Average Wage—In 2014, Utah's average annual nonfarm wage was $42,529, an increase of 3.6 percent from 2013. The average annual wage is forecast to increase 1.9 percent in 2015.

Employment, Wages, and Income

Total Nonfarm Employment (2015)	**1,362,400**
Change (2014-2015)	33,400
Percent Change (2014-2015)	2.5%
Unemployment (2015)	3.6%
Total Nonfarm Wages (2015)	**$59.1 billion**
Percent Change (2014-2015)	4.5%
Average Annual Wage (2015)	**$43,356**
Percent Change (2014-2015)	1.9%
Total Personal Income (2015)	**$115.8 billion**
Percent Change (2014-2015)	4.7%
Per Capita Personal Income (2015)	**$38,641**
Percent Change (2014-2015)	3.0%

Source: Revenue Assumptions Working Group 2015 = Forecast

Percent Change in Utah Employment by Industry



Source: Utah Department of Workforce Services e = estimate f = forecast

Demographics

2013 Census Bureau State Population Estimates—At the end of December 2013, the U.S. Census Bureau released the July 1, 2013 population estimates for the nation and states. The total July 1, 2013 population estimate for the United States was 316,128,839. This represents a population increase of 2,255,154 people or 0.7 percent from 2012. This is the slowest national growth since the 1940s. Utah's 2013 total population estimate was 2,900,872. This represents a population increase of 46,001 people or 1.6 percent from 2012, ranking Utah third among states and the District of Columbia in population growth. Utah grew more than twice as fast as the nation from 2012 to 2013.

Utah and U.S. Population Estimates

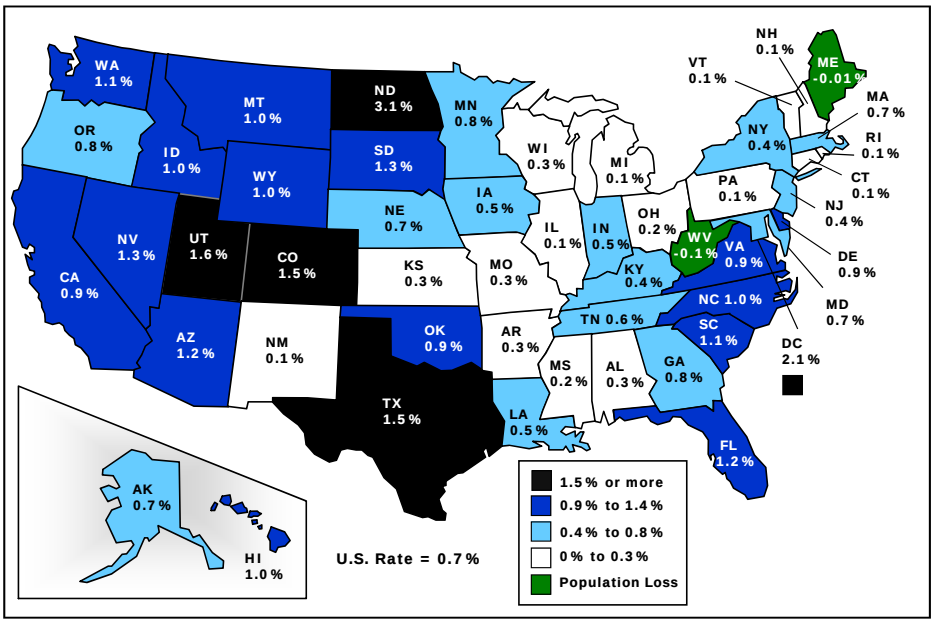
	Utah	United States
2012 Estimate	2,854,871	313,873,685
2013 Estimate	2,900,872	316,128,839
2012-2013 Percent Change	1.6%	0.7%
2012-2013 Absolute Change	46,001	2,255,154

Source: U.S. Census Bureau, Vintage 2013 Estimates

Rate of Growth—The majority of states with the highest growth rates from 2012 to 2013 were located in the West and South regions of the United States. The top ten states or equivalent with the highest growth rates include: North Dakota (3.1 percent), District of Columbia (2.1 percent), Utah (1.6 percent), Colorado (1.5 percent), Texas (1.5 percent), Nevada (1.3 percent), South Dakota (1.3 percent), Florida (1.2 percent), Arizona (1.2 percent), and Washington (1.1 percent).

2014 Outlook—Utah will continue to experience population growth at a rate higher than most states in 2014 on account of strong natural increase in addition to in-migration. Natural increase (births less deaths) is anticipated to add 37,200 people to Utah's population. While net in-migration has slowed during the economic recession, Utah's net migration is projected to increase to 11,700 people.

Population Growth Rates by State: 2012-2013



Source: U.S. Census Bureau, Vintage 2013 Estimates

Preface

The *2015 Economic Report to the Governor* is the 27th publication in this series. Through the last two decades, the *Economic Report to the Governor* has served as the preeminent source for data, research, and analysis related to the Utah economy. It includes a national and state economic overview, a summary of state government economic development activities, an analysis of economic activity based on the standard indicators, and a detailed review of industries and issues of particular interest. The primary goal of the report is to improve the reader's understanding of the Utah economy. With improved economic literacy, decision makers in the public and private sector will be able to plan, budget, and make policy decisions with an awareness of how their actions are both influenced by and impact economic activity.

Utah Economic Council/Collaboration

In addition to the customary review and commentary brought forth by the Bureau of Economic and Business Research (BEBR) at the University of Utah, the *2015 Economic Report to the Governor* will be the first to feature a new partnership with the Utah Economic Council, a joint venture between the Salt Lake Chamber, the David Eccles School of Business, and the Governor's Office of Management and Budget. The Council aims to guide data development, inform research activities, share economic commentary, provide peer review, and support an improved understanding of the Utah economy. The Utah Economic Council and BEBR, as well as additional authors from both the private and public sectors, devote a significant amount of time to the creation of this report, ensuring the latest economic and demographic information is included. More detailed information about the findings in each chapter can be obtained by contacting the authoring entity.

Data Used in This Report

The contents of this report come from a multitude of sources which are listed at the bottom of each table and figure. Data are generally for the most recent year or period available. There may be a quarter or more of lag time before economic data become final, therefore some statistics in this report are estimates based on data available as of mid-November 2014. Readers should refer to noted sources later in 2015 for final data. Forecasts are also included in some of the tables and figures. All of the 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. If there are questions about the sources, limitations, and appropriate use of the data included in this report, the relevant entity should be contacted.

Data for States and Counties

This report focuses on the state, multi-county, and county geographies. Additional data at the metropolitan, city, and other sub-county level may be available. For information about data for a different level of geography than shown in this report, the contributing entity should be contacted.

Electronic Access

This report is available on the Bureau of Economic and Business Research's web site at www.bebr.business.utah.edu as well as the Governor's Office of Management and Budget web site at www.gomb.utah.gov.

Suggestions and Comments

Users of the *Economic Report to the Governor* are encouraged to write with suggestions that will improve future editions. Suggestions and comments for improving the coverage and presentation of data and quality of research and analysis should be sent to the Bureau of Economic Research, 1655 Campus Center Drive, Room 1113, Salt Lake City, Utah 84112 or by email at bureau@business.utah.edu.

Content

Figures

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Map of Utah


Bear River
Cache
Rich
Box Elder
Weber
Morgan
Davis
Summit
Daggett
Wasatch Front
Salt Lake
Tooele
Wasatch
Utah
Duchesne
Uintah
Mountainland
Uintah Basin
Juab
Carbon
Central
Sanpete
Emery
Grand
Millard
Sevier
Southeastern
Beaver
Piute
Wayne
Iron
Garfield
Southwestern
San Juan
Washington
Kane

Economic Indicators for Utah and the United States

ECONOMIC INDICATORS	UNITS	2012 ACTUAL	2013 ACTUAL	2014 ESTIMATE	2015 FORECAST	PERECENT CHANGE 2013	2014	2015
PRODUCTION AND SPENDING								
U.S. Real Gross Domestic Product	Billion Chained $2009	15,369.2	15,710.3	16,057.0	16,521.5	2.2	2.2	2.9
U.S. Real Personal Consumption	Billion Chained $2009	10,449.7	10,699.7	10,938.1	11,231.0	2.4	2.2	2.7
U.S. Real Private Fixed Investment	Billion Chained $2009	2,368.0	2,479.2	2,613.9	2,800.2	4.7	5.4	7.1
U.S. Real Federal Defense Spending	Billion Chained $2009	768.7	717.7	696.3	692.1	-6.6	-3.0	-0.6
U.S. Real Exports	Billion Chained $2009	1,960.1	2,019.8	2,076.3	2,177.4	3.0	2.8	4.9
Utah Exports (NAICS, Census)	Million Dollars	19,255.8	16,111.4	12,257.7	13,017.5	-16.3	-23.9	6.2
Utah Coal Production	Million Tons	17.2	17.0	17.2	15.0	-0.9	1.2	-12.8
Utah Crude Oil Production	Million Barrels	30.2	35.0	40.5	43.7	15.9	15.7	7.9
Utah Natural Gas Production Sales	Billion Cubic Feet	436.2	409.5	405.0	395.0	-6.1	-1.1	-2.5
Utah Copper Mined Production	Million Pounds	373.9	486.9	550.0	465.8	30.2	13.0	-15.3
Utah Molybdenum Production	Million Pounds	20.6	12.7	14.5	20.0	-38.6	14.4	37.9
SALES AND CONSTRUCTION								
U.S. New Auto and Truck Sales	Millions	14.4	15.5	16.4	16.7	7.6	5.5	1.9
U.S. Housing Starts	Millions	0.8	0.9	1.0	1.3	18.6	9.9	26.1
U.S. Private Residential Investment	Billion Dollars	442.3	519.9	564.7	657.6	17.5	8.6	16.5
U.S. Nonresidential Structures	Billion Dollars	446.9	457.2	503.4	521.8	2.3	10.1	3.7
U.S. Home Price Index (FHFA)	1980Q1 = 100	311.8	324.6	348.3	360.2	4.1	7.3	3.4
U.S. Nontaxable & Taxable Retail Sales	Billion Dollars	4,863.3	5,066.9	5,262.8	5,468.0	4.2	3.9	3.9
Utah New Auto and Truck Sales	Thousands	96.8	107.5	113.4	118.0	11.0	5.5	4.0
Utah Dwelling Unit Permits	Thousands	11.2	14.9	16.5	17.5	33.1	10.7	6.1
Utah Residential Permit Value	Million Dollars	2,192.4	3,220.4	3,160.0	3,500.0	46.9	-1.9	10.8
Utah Nonresidential Permit Value	Million Dollars	1,016.6	1,087.2	970.0	1,100.0	6.9	-10.8	13.4
Utah Additions, Alterations and Repairs	Million Dollars	726.0	776.5	600.0	600.0	7.0	-22.7	0.0
Utah Home Price Index (FHFA)	1980Q1 = 100	308.5	331.4	355.1	373.8	7.4	7.1	5.3
Utah Taxable Retail Sales	Million Dollars	23,512	24,944	26,022	27,322	6.1	4.3	5.0
Utah All Taxable Sales	Million Dollars	47,531	49,404	51,369	54,255	3.9	4.0	5.6
DEMOGRAPHICS AND SENTIMENT								
U.S. July 1st Population	Millions	314.5	316.7	319.0	321.5	0.7	0.7	0.8
U.S. Consumer Sentiment (U of M)	Diffusion Index	76.5	79.2	83.2	90.7	3.5	5.1	8.9
Utah July 1st Population	Thousands	2854.9	2900.9	2949.2	2998.6	1.6	1.7	1.7
Utah Net Migration	Thousands	3.7	9.2	10.7	11.0	148.6	16.6	2.7
PROFITS AND RESOURCE PRICES								
U.S. Corporate Before Tax Profits	Billion Dollars	2,136.1	2,235.3	2,455.9	2,545.6	4.6	9.9	3.7
U.S. Corporate Profit [above less Fed. Res.]	Billion Dollars	2,064.4	2,155.8	2,364.3	2,450.6	4.4	9.7	3.6
West Texas Intermediate Crude Oil	$ Per Barrel	94.2	98.0	98.0	93.5	4.0	0.0	-4.6
U.S. Coal Producer Price Index	1982 = 100	211.4	208.2	201.1	207.0	-1.6	-3.4	2.9
Utah Coal Prices	$ Per Short Ton	35.8	34.2	33.1	32.0	-4.5	-3.2	-3.3
Utah Oil Prices	$ Per Barrel	82.7	84.8	77.5	53.0	2.5	-8.6	-31.6
Utah Natural Gas Prices	$ Per MCF	2.82	3.70	4.20	3.80	31.0	13.6	-9.5
Utah Copper Prices	$ Per Pound	3.60	3.40	3.15	3.00	-5.6	-7.4	-4.8
Utah Molybdenum Prices	$ Per Pound	13.0	10.3	12.8	13.0	-20.7	24.2	1.6
INFLATION AND INTEREST RATES								
U.S. CPI Urban Consumers (BLS)	1982-84 = 100	229.6	233.0	237.3	240.7	1.5	1.9	1.4
U.S. GDP Chained Price Index (BEA)	2005 = 100	105.2	106.7	108.5	110.4	1.5	1.6	1.8
U.S. Federal Funds Rate (FRB)	Effective Rate	0.14	0.11	0.09	0.31	-23.2	-18.9	257.9
U.S. 3-Month Treasury Bills (FRB)	Discount Rate	0.09	0.06	0.04	0.35	-32.0	-25.5	708.7
U.S. 10-Year Treasury Notes (FRB)	Yield (%)	1.80	2.35	2.61	3.23	30.4	11.2	23.4
30 Year Mortgage Rate (FHLMC)	Percent	3.66	3.98	4.24	4.91	8.9	6.5	15.7
EMPLOYMENT AND WAGES								
U.S. Establishment Employment (BLS)	Millions	134.1	136.4	138.9	141.4	1.7	1.8	1.8
U.S. Average Annual Pay (BLS)	Dollars	51,694	52,248	53,846	55,437	1.1	3.1	3.0
U.S. Total Wages & Salaries (BLS)	Billion Dollars	6,932	7,125	7,477	7,837	2.8	4.9	4.8
Utah Nonagricultural Employment (DWS)	Thousands	1,248.9	1,290.4	1,329.0	1,362.4	3.3	3.0	2.5
Utah Average Annual Pay (DWS)	Dollars	40,646	41,063	42,529	43,356	1.0	3.6	1.9
Utah Total Nonagriculture Wages (DWS)	Million Dollars	50,762	52,989	56,521	59,068	4.4	6.7	4.5
INCOME AND UNEMPLOYMENT								
U.S. Personal Income (BEA)	Billion Dollars	13,888	14,167	14,752	15,423	2.0	4.1	4.6
U.S. Unemployment Rate (BLS)	Percent	8.1	7.4	6.3	5.8	-9.0	-14.9	-7.4
Utah Personal Income (BEA)	Million Dollars	101,163	104,910	109,255	114,365	3.7	4.1	4.7
Utah Unemployment Rate (DWS)	Percent	5.4	4.4	3.6	3.6			

Sources: State of Utah Revenue Assumptions Working Group, Moody's Economy.Com, and IHS Global Insight

Executive Summary

National Overview

Across the United States, economic conditions are improving and are expected to continue to do so. Solid gains in employment propelled improvement in the labor market during 2014. These gains helped push the unemployment rate down, which was estimated to end the year under 6 percent. However, wage gains were sluggish and remain a concern. Subdued wage gains and a softening global economic picture all contributed to an environment that kept inflation in check throughout 2014. The normalization of monetary policy and the impact of central bank policy on longer term financial stability will remain a focus throughout 2015, due to the fact that the allocation of capital is influenced by interest rates.

The greatest near-term threats to growth on the national level come from abroad. Slowing emerging markets, China's transitioning growth model and Europe's on-going crisis will all pose risks to growth. In addition, geopolitical instability and the threat of terrorism have the potential to adversely affect U.S. economic growth. While risks remain, the outlook for the U.S. economy is positive. U.S. GDP growth is expected to reach 2.9 percent in 2015. This moderate growth will produce better economic conditions and represents an improvement over 2014.

Utah Overview

Utah's economy performed well in 2014 and the outlook for 2015 is positive. Concerns from abroad pose the greatest risk in 2015. These risks should be monitored due to Utah's increased global interconnectivity. Although uncertainty surrounding federal fiscal policy had a negative impact during the past several years, this is not expected to be the case in the near future. Utah's labor market improved in 2014, with unemployment falling into the mid-three percent range during the year. Employment growth during the year was moderate; however, even with an unemployment rate well below 4 percent, Utah has not reached full employment. Growth in Utah's labor market in 2015 is expected to taper off slightly at 2.5 percent. While this is below long-term averages, an improving national economy could lift current growth projections.

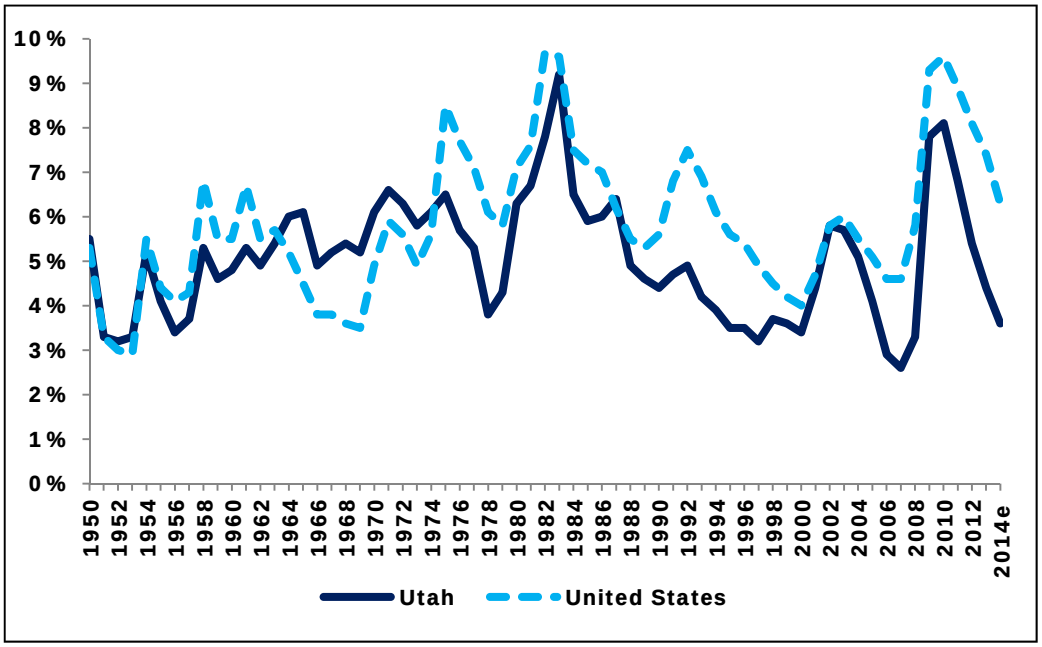
One sector that is having a transformative effect on areas of Utah is tech. Significant venture capital investments are indicative of the market's confidence in Utah's tech industry. In 2014, investments in area firms easily surpassed 2013 totals and several large venture capital deals in the state surpassed $100 million in value. In addition to impressive economic activity in the tech sector, large investments were made across the state in other sectors as well. On the public sector side, the most prominent project underway is the terminal redevelopment at Salt Lake City International Airport, which broke ground in 2014 and will be completed in 2022. Overall, 2014 was a good year for Utah's economy. Barring any major disruptions to the global and national economies, the state can look forward to continuing moderate growth and improving economic conditions in 2015.

Economic Indicators

Demographics

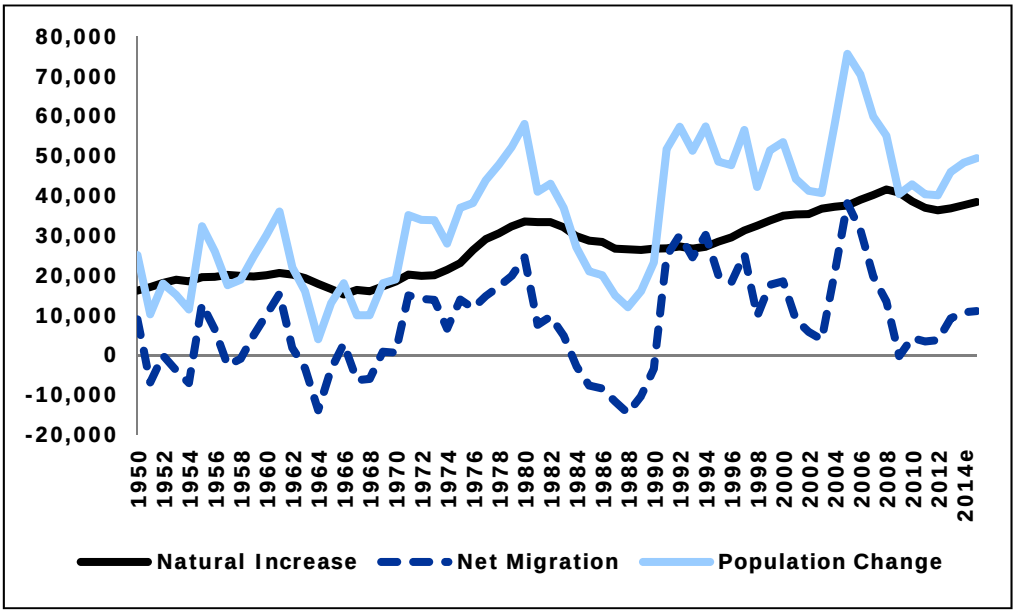
In 2013, the overall population of the State of Utah was estimated to be 2,900,872, an increase of 1.6 percent from 2012, according to the U.S. Census Bureau. This is lower than the decade high growth of 3.1 percent experienced in 2005. A total of 46,001 people were added to Utah's population, with 19.9 percent of this increase coming from those moving into the state. Utah's unique characteristics, including high fertility and low mortality rates, consistently contribute to strong

Figure 1.1
Utah Unemployment Below United States



Source: Utah Department of Workforce Services

Figure 1.2
State of Utah Components of Population Change



Sources: Utah Population Estimates Committee, U.S. Census Bureau, State of Utah Revenue Assumptions Working Group

natural increase, or the difference between births and deaths. Utah will continue to experience population growth at a rate higher than most states in 2015 due to a strong natural increase in addition to in-migration. Natural increase is anticipated to add 38,360 people to Utah's population. While net in-migration slowed during the economic recession, Utah's net migration is projected to increase to approximately 11,000 people.

Employment, Wages, and Labor Force
Utah's labor market for 2014 can best be described as expanding in a moderately strong fashion. New jobs developed at a far greater pace than the national average and unemployment continued to trend downward. Utah continuously ranks in the top five states for low unemployment and high job growth. New claims for unemployment insurance trended below 2013 levels, as did the amount of time for those drawing on a claim. Overall, 2014 was a constructive year for Utah labor markets. Employment projections for 2015 show approximately 33,400 jobs will be added to the Utah economy, a growth rate of 2.5 percent. While wage growth acceleration may be one of the more direct influences on the potential for greater employment growth, there are numerous factors that could keep employment growth above 2.5% in 2015.

Personal Income
Utah personal income is expected to increase by 4.7 percent in 2015, on par with the projected growth rate for the U.S. economy. Per capita personal income is forecast to increase 3.0 percent in 2015. This is slightly less than the projected growth in U.S. per capita income of about 3.5 percent over the same period. Given the slow growth that the U.S. economy continues to experience and the reduced monetary stimulus from the Federal Reserve in 2014, the Utah economy will likely continue to perform in step with the U.S. average.

Taxable Sales
In 2014, Utah taxable sales benefited from economic conditions including a growing labor market and relatively high consumer confidence. Total taxable sales are currently estimated to increase by 4.0 percent in 2014 and are projected to increase by 5.6 percent in 2015. Growth in taxable sales in 2014 and 2015 is expected in each of the three major components of taxable sales: retail sales, business investment purchases, and taxable services.

Tax Collections
Total unrestricted state revenues increased 2.1 percent in fiscal year (FY) 2014 following a 7.6 percent increase in FY2013. Tax collections for both sales and income tax, which account for approximately 75 percent of all unrestricted revenue, increased in FY2014. The outlook for tax collections is positive with continued growth in total unrestricted tax revenue of 3.8 percent is expected in FY2015.

Exports
In the face of declining gold prices, the value of Utah's total merchandise exports fell by 16 percent in 2013, bucking a decade long trend of steadily increasing export values. The long-term future of Utah's export industries is bright, however, as non-gold exports, the major job producer, continue to grow steadily and Utah's export profile will gradually become more diversified on both sectoral and regional dimensions.

Price Inflation and Cost of Living
Utah's cost of living is below the national average. Inflation rates over the past several years have remained well below historical levels, primarily due to the weak global markets and downturn in the labor market that began in 2008. Economic conditions have greatly improved over the past two years, but there are still several factors that will likely keep inflation in

check. The Consumer Price Index increased by 1.5 percent in 2013, measured on an annual average basis, compared to an increase of 2.1 percent in 2012. The CPI increased 1.7 percent during the first half of 2014 and was being driven higher by increasing food and housing prices. In the coming years, the improving economy will likely cause inflation to reach more normal levels around 2-3 percent.

Industry Focus

Construction

Home building construction continued its slow recovery from the Great Recession. Typically, four years after the trough construction has recovered to about 80 percent of the pre-recession peak. In the current cycle, however, the recovery is only about 50 percent of the pre-recession peak, 11,600 single family homes in 2014 versus 21,000 in 2005, despite historically low mortgage rates. The value of permit-authorized construction in Utah was $4.7 billion in 2014, down slightly from $5.0 billion in 2013. This estimate includes the value of residential and nonresidential construction and additions, alterations, and repairs. Residential construction declined by 2 percent despite an increase in the number of residential units. The decline in value was due, in part, to a shift in types of residential units receiving building permits, fewer single family homes and more apartments.

Utah's construction sector will see modest improvement in 2015. The value of permit authorized construction is expected to increase by about 10 percent to $5.2 billion in 2015. The value of residential construction will account for two-thirds of total permit authorized construction valuation. Residential construction activity will include 17,500 residential units valued at $3.5 billion. Single family units will increase from 11,600 units in 2014 to 13,000 units in 2015 while the number of multifamily units will remain largely unchanged at around 4,400 units.

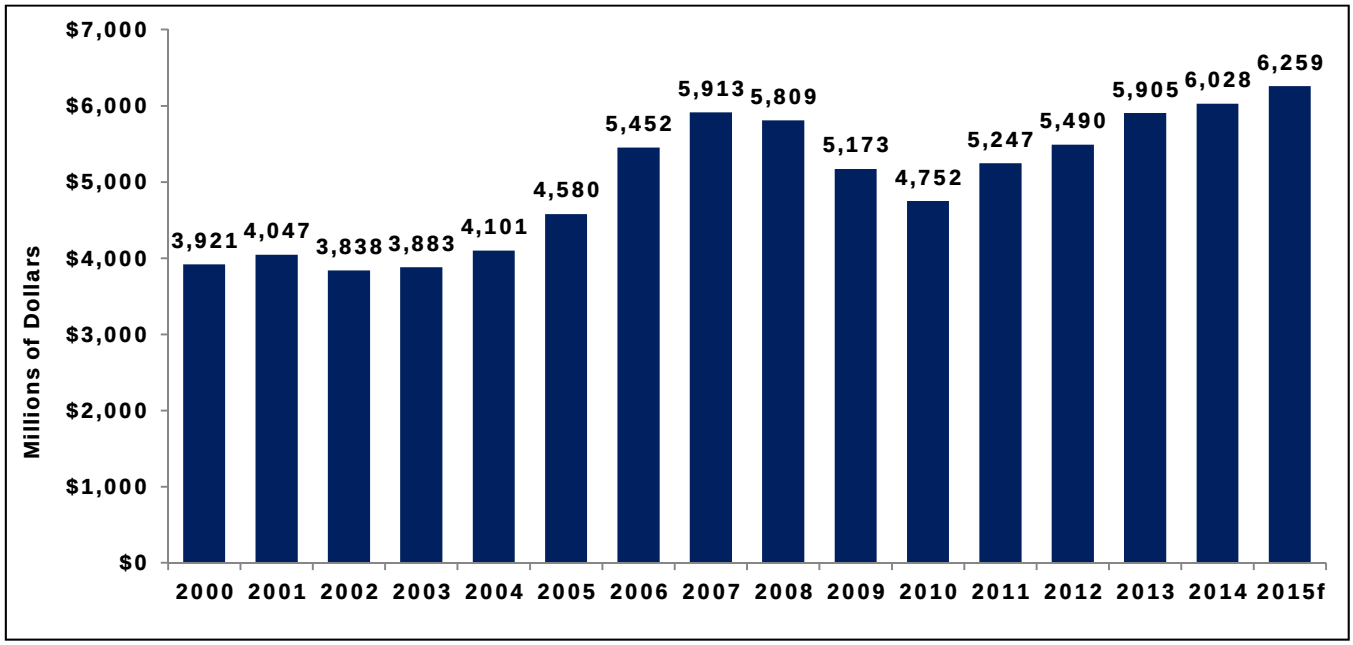
Energy

Utah continues to experience significant annual increases in crude oil production, stemming from healthy crude oil prices spurring exploration and development in the Uinta Basin. In contrast, natural gas production retreated from record-highs as prices have softened in the past few years. Coal production in 2014 is still near a 30-year low, as demand in Nevada and California diminishes as coal plants convert to natural gas. Production of electricity in Utah increased for the second straight year, lifted by a growing economy. Utah's average cost of electricity remained well below the national average, mainly due to our reliance on established, low-cost, coal-fired generation. Consumption of petroleum products and natural gas increased in 2014, whereas coal consumption dropped. Utah will continue to be a net-exporter of energy by producing more natural gas, coal, and electricity than is used in-state, but will remain reliant on other states and Canada to satisfy our demand for crude oil and petroleum products.

Minerals

The gross production value of nonfuel mineral commodities produced in Utah in 2014 totaled $4.3 billion, an increase of about $400 million over 2013 estimates. The estimate includes a base metals value of $2.46 billion (58 percent), an industrial

Figure 1.3
State of Utah Revenue Collections



Source: Utah State Tax Commission and Governor's Office of Management and Budget

minerals value of $1.37 billion (32 percent), and a precious metals value of $444 million (10 percent). The gross production value of Utah's nonfuel mineral commodities in 2015 will be flat to slightly below 2014 totals.

Tourism, Travel, and Recreation

Utah's tourism and travel sector experienced growth during the first half of 2014, including increases in state and local tourism-related tax revenues, leisure and hospitality taxable sales, tourism-related jobs and wages, and park and ski resort visits. Tourism-related taxes, such as transient room, restaurant, short term leasing, and resort communities sales taxes, increased from 8 percent to 19 percent from fiscal year 2013 to fiscal year 2014. Total taxable sales in the leisure and hospitality sector had increased 7 percent during the first half of 2014, while gas stations, grocery stores, and tourism-related retail sales increased anywhere from 2 to 4 percent. Ski Utah reported the third most skier visits on record during the 2013/14 ski season and 2014 national and state park visits were trending above total 2013 visits.

Nonprofit Sector

Nonprofits play a significant role in the social and economic fabric of Utah and the United States. Charitable organizations accounted for over 9 percent of Utah's GDP and employed more than 5.5 percent of Utah's workforce. The nonprofit sector is expected to continue to grow at an increasing rate, despite expenses that exceed revenues as organizations financially recover from the Great Recession.

Special Topics

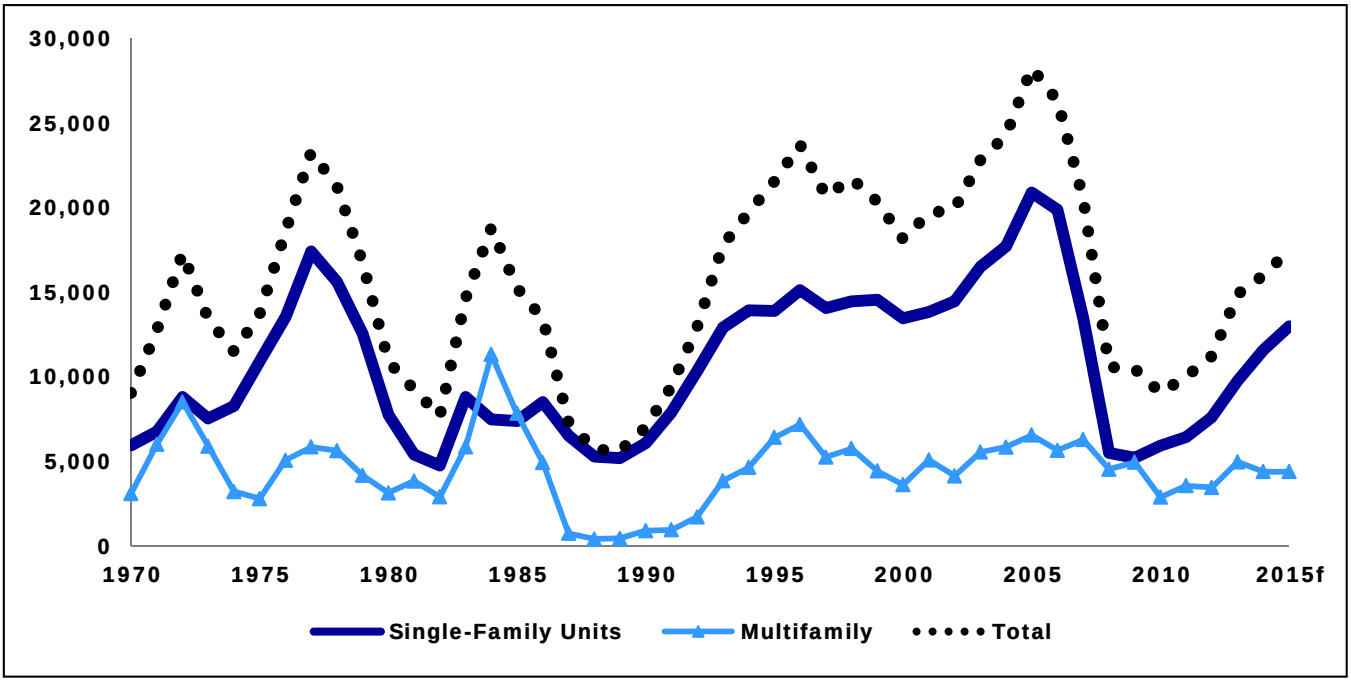
Intergenerational Poverty in Utah

Although Utah has emerged from the Great Recession and is experiencing economic growth, 10.1 percent of Utahns were living in poverty from 2011-2013. Fortunately, Utah's poverty rate is significantly lower than the national average. However, there are high societal and economic costs of allowing generations of families to remain in poverty. This jeopardizes not only their future but the state's future in lost human capital, should it fail to implement programs and policies designed to end the cycle of poverty for Utah children. The data related to families caught in the cycle of poverty and welfare dependence demonstrate that there are significant barriers beyond income that jeopardize their ability to emerge from the cycle.

Economic Mobility, Inequality, and "The American Dream"

Three interrelated concepts, economic mobility, inequality, and "The American Dream," have received a wealth of media coverage in recent years. These issues have also been popular in the local media. The Equality of Opportunity Project received broad attention in Utah for its work on income mobility. Using tax record data, the project examined economic mobility across the United States. Utah has consistently better mobility than the national average. The "American Dream" can be defined as a national ethos of the United States, a set of ideals in which freedom includes the opportunity for prosperity and success, and an upward social mobility achieved through hard work.

Figure 1.4
Utah Residential Construction Activity



Source: University of Utah, David Eccles School of Business, Bureau of Economic and Business Research

National Outlook

Today's world is changing quickly. Rapidly developing events in an unfamiliar economic landscape keeps forecasters, policymakers, businesses, and consumers on edge. Internationally, the economic picture remains complicated. Emerging markets are slowing and performance is mixed in developed economies. However, in the United States, economic conditions are improving and are expected to continue to do so.

United States Labor Market

Solid gains in employment propelled improvement in the labor market during 2014. These gains helped push the unemployment rate down, which was estimated to end the year under 6 percent. However, wage gains were sluggish and remain a concern. The drop in labor force participation, which occurred during and after the Great Recession, is also problematic. The White House attributes approximately half of the national decline to demographics. In essence, a lower national unemployment rate over-represents improvement in the labor economy.

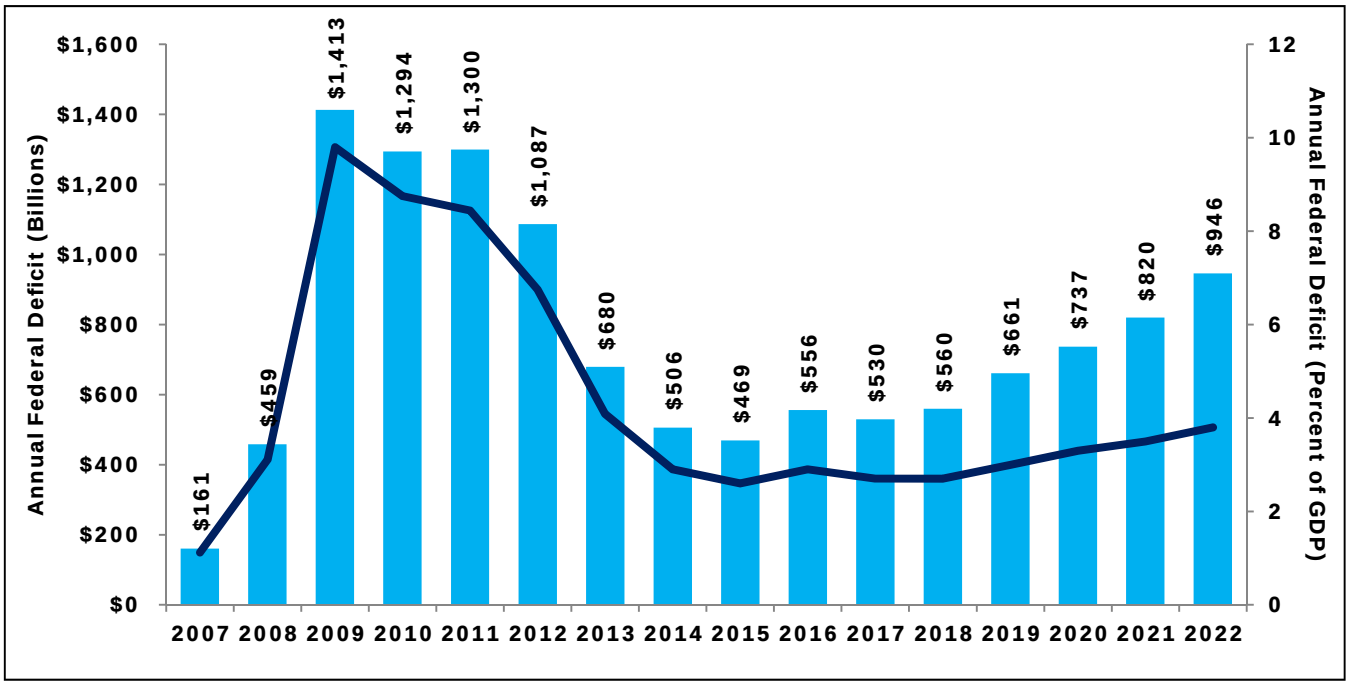
Monetary Policy

Subdued wage gains and a softening global economic picture all contributed to an environment that kept inflation in check throughout 2014. By late 2014, the price index for personal consumption expenditures, a preferred measurement of inflation for the Federal Reserve, remained below the bank's target, as it had for almost two and a half years. The danger of rapidly accelerating inflation in the near-term remains low.

It is important to consider such an environment in the context of the Federal Reserve's dual mandate, which aims to achieve both maximum employment and price stability. The combination of subdued inflation and room for improvement in the national labor market has allowed for, and motivated, the Federal Reserve's monetary policy. In October 2014, the Federal Open Market Committee (FOMC) saw enough improvement in the economy and corresponding employment gains to conclude its asset purchase program (also known as quantitative easing). However, the committee maintained its position that the federal funds rate would remain near zero for a "considerable time." The first increase in the federal funds rate is generally expected in 2015.

The normalization of monetary policy and the impact of central bank policy on longer term financial stability will remain in focus throughout 2015, due to the fact that the allocation of capital is influenced by interest rates. As such, riskier investments made in search of higher returns have the potential to create future instability in financial markets. This challenge highlights the complex environment in which these decisions are made, balancing consideration for short term improvement and long-term stability.

Figure 2.1
United States Annual Deficit

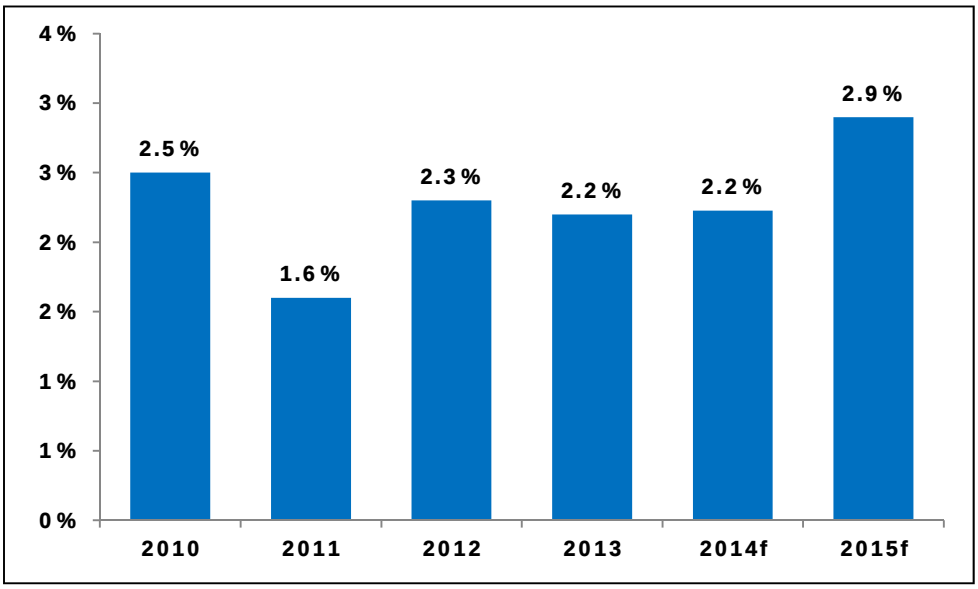


Source: Congressional Budget Office

Business Activity

Overall, business sentiment showed improvement in 2014 compared to the previous year. Generally speaking, businesses remain cautious, particularly with regard to future capital expenditures and hiring expectations.[1] However, as economic conditions continue to improve throughout 2015, businesses will likely be motivated to invest in equipment and continue hiring at healthy levels. Indeed, there are bright spots in the national economy.

Figure 2.2
United States Real GDP Growth



Source: Bureau of Economic Analysis & State of Utah Revenue Assumptions Working Group

Areas with significant exposure to the tech and energy sectors performed well in 2014. In 2015, lower oil prices will slow exploration and investment in the energy sector. Consequently, many areas of the country with significant exposure to the energy sector will experience lower growth levels. Negative effects of lower oil prices will largely remain on the regional level. Nationally, lower energy prices are a net gain for the economy as consumers enjoy more disposable income.

It is important to note lower prices will only temporarily restrain the U.S. energy sector. Many producers are hedged against lower prices and a large number of oil fields will remain profitable, even will lower oil prices.[2] Furthermore, new efficiencies and lower costs in established fields indicate that America's energy revolution is not likely to be derailed by price fluctuations such as those experienced at the end of 2014. In addition to these sectors, manufacturing continued to show strength in 2014 and industrial capacity utilization rose to levels not seen since 2008.[3]

Federal Government

On the public sector side, 2014 saw less disruptive governance as agreements were reached to lessen the impact of sequestration and the debt ceiling was suspended until March 2015. The precedence of these compromises, along with a narrowing budget deficit due to an improving economy, give reason to believe 2015 will not be a year in which policymaker action or inaction creates a significant drag on growth. However, the Congressional Budget Office expects declining deficits to reverse in 2016 and begin an upward trajectory. As such, it is important to note that long-term budgetary issues remain, and will need to be addressed.

Demographics

Shifting demographics are also affecting the U.S. economy and will continue to do so. The group known as "Gen Y" or "Millennials" will make up one-third of adults by 2020 and up to 75 percent of the workforce in the U.S. by 2025.[4] The preferences and challenges of this generation will influence economic dynamics in areas ranging from housing to retail, among others.

In addition, the aging of America's "Baby Boomers" will influence the nation's economy in coming years. Looking ahead, one out of every five Americans will be over the age of 65 by the year 2030.[5] This will affect everything from the demand for healthcare, to consumer preferences and federal deficits.

Outlook

Generally speaking, the greatest near-term threats to growth on the national level come from abroad. Slowing emerging markets, China's transitioning growth model and Europe's on -going crisis will all pose risks to growth. In addition, geopolitical instability and the threat of terrorism maintain the potential to adversely affect U.S. economic growth.

While risks remain, the outlook for the U.S. economy is positive. U.S. GDP growth is expected to reach 2.9 percent in 2015. This moderate growth will produce better economic conditions and represents an improvement over 2014.

1. Business Roundtable, CEO Survey. Q3 2014
2. Wall Street Journal, "Energy Boom Can Withstand Steeper Oil-Price Drop." October 2014.
3. U.S. Federal Reserve, "Industrial Production and Capacity Utilization." December 2014
4. The Brookings Institution, "How Millennials Could Upend Wall Street and Corporate America." May 2014.
5. U.S. Census Bureau, "The Baby Boom Cohort in the United States: 2012 to 2060." May 2014.

Utah Overview

Utah's economy performed well in 2014 and the outlook for 2015 is positive. Important factors to consider include demographic changes and impressive growth in the tech sector. Other sectors such as energy and manufacturing will influence growth dynamics in areas across the state as well. Although risks to a generally positive outlook remain, they originate outside of the state on the national and global level.

External Threats

Concerns from abroad pose the greatest risk in 2015. These risks should be monitored because Utah is more connected to the world than ever before. For example, hundreds of thousands of jobs in the state are tied to exports. On the conservative side, 217,000 positions in Utah are supported by exports; using a broader definition, the number reaches as high as 419,000 jobs.[1] One study puts the number of positions supported by international trade at over 350,000. Furthermore, the share of jobs tied to trade more than doubled over the last two decades, according to the same study.[2] Utah does business with 195 countries around the world and exported over $16 billion in goods to foreign destinations in 2013, with significant ties to countries in North America, Europe, and Asia.[3] Understanding this reality, it is important to note that developments far from the Mountain West affect the economic wellbeing of this area.

Although uncertainty surrounding federal fiscal policy had a negative impact during the past several years, this is not expected to be the case in the near future. However, one issue to monitor is the debt ceiling, which was suspended through March of 2015. If the issue is not handled in a prudent manner, it has potential to be highly disruptive to the broader economy. Sequestration, implemented as part of the Budget Control Act of 2011, is another policy area that should be monitored. The effects of these untargeted budget cuts were lessened by the Murray-Ryan deal of 2013; however, the long-term sustainability of the federal budget has not been sufficiently addressed and will be an increasing source of uncertainty as time passes.

Even with uncertainty on the federal level, some news for Utah has been positive. For example, the United States Air Force is consolidating maintenance work for the new F-22 fighter jet and allocating the work to Hill Air Force Base. The move will create hundreds of new jobs. Still, future changes in the nation's fiscal policy maintain the potential to adversely affect Utah's economy; but recent developments such as the expansion of work performed at Hill Air Force Base provide reason to believe that a worst case scenario will not play out in the state.

Utah Labor Market

Utah's labor market improved in 2014, with unemployment falling into the mid-three percent range during the year. Employment growth during the year was moderate; but even with an unemployment rate well below 4 percent; Utah has not reached full employment. Wage growth in the state remains lackluster and, similar to the national story, labor participation is problematic. In Utah, labor participation began to fall in 2007. The participation rate bottomed in 2011 and, while it has generally improved since then, has yet to fully recover. While a large portion of the decline nationally can be attributed to demographic factors (primarily baby boomers entering retirement), this is not the case in Utah. Analysis of participation rates reveals the greatest drop in participation occurred among younger workers. Although there is still room for improvement in the state's labor market, it should be noted that moderate growth is spurring improvement and is expected to continue doing so during the near term.

Growth in Utah's labor market in 2015 is expected to taper off slightly at 2.5 percent. While this is below long-term averages, an improving national economy could lift current growth projections. As improvements in the labor economy occur, discouraged workers will be drawn back into the labor force. This expected development will hold the unemployment rate near 2014 levels in the mid-three percent range. Beyond labor statistics, there are a number of other issues that will affect Utah's economy.

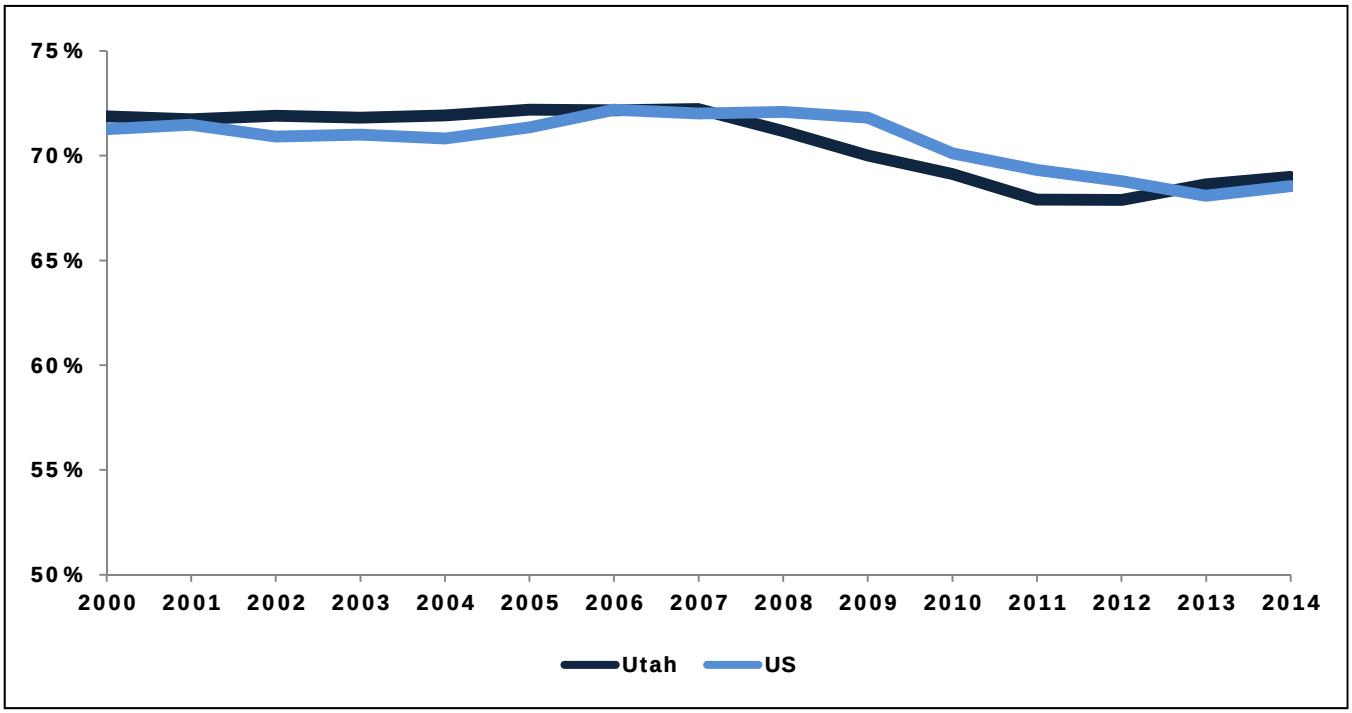
Demographics

Demographics will influence the Utah economy as generational differences shape behavior and experiences. When viewed collectively, life milestones such as marriage, birth of children, and home buying all influence economic growth. Inevitably, the purchase of goods, such as cars to accommodate a growing family or furniture and appliances for a new home, follow and create demand in the local economy. However, in recent years, trends in this regard have been disrupted as household formation lags. While there are undoubtedly many factors influencing these trends, Millennials continue to confront difficult economic realities. For example, while Utah's average student debt load is one of the lowest nationally, the state experienced the fifth largest percentage increase in the nation from 2005 to 2012.[4]

In addition to dealing with higher debt loads, entering the workforce during difficult economic times affects wages. Graduates entering the labor force in such times earn 6-7 percent less for every 100 basis point increase in the national

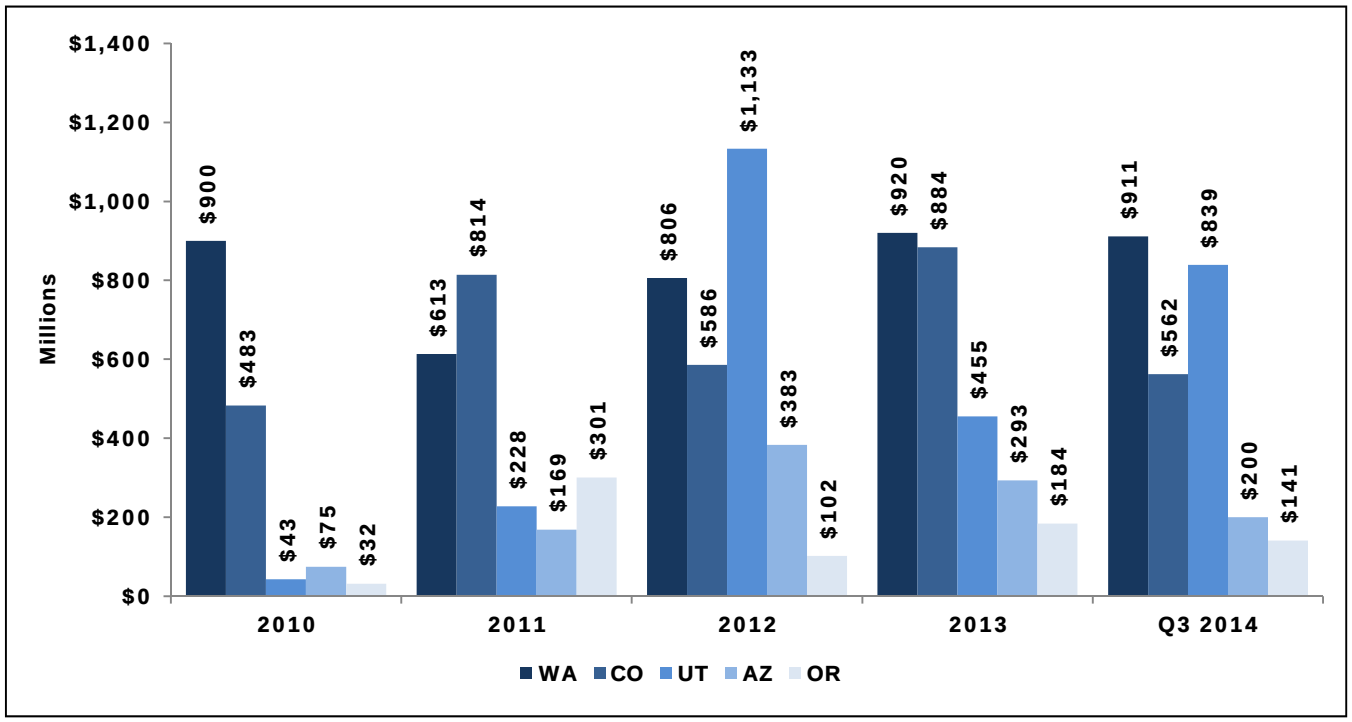
1. Utah Department of Workforce Services, Jobs Supported by Export Analysis. November 2014.
2. Business Routable, "How Utah's Economy Benefits from International Trade and Investment." 2014.
3. U.S. Census Bureau, State Exports via Utah. 2014.
4. College Insight, Student Debt Database. August 2014

Figure 3.1
Labor Force Participation Rate



Note: Axis does not start at zero
Source: Bureau of Labor Statistics, Employment status of the civilian non-institutional population, seasonally adjusted

Figure 3.2
Venture Capital Investments by State



Source: CB Insights

jobless rate. Furthermore, this initial reduction in earnings can impact future wages of these entrants for up to 15 years.[5]

Reduced earnings and more student debt will continue influencing the way in which Millennials experience young adulthood. The challenges, preferences and concerns of this generation will undoubtedly affect economic dynamics for years to come. This is of particular importance in Utah due to the fact that the state maintains a higher concentration of Millennials than the nation as a whole. In fact, Nielsen ranks the Salt Lake market as the number two market for Millennials, just behind Austin, Texas. As such, their importance to the Utah economy cannot be overstated.

Tech

One sector that is generating opportunities well-suited for Millennials and is having a transformative effect on areas of Utah is tech. The importance of this sector (commonly referred to as Silicon Slopes) in the state is growing and will continue to do so. Significant venture capital investments indicate the market's confidence in Utah's tech industry. In 2014, investments in area firms easily surpassed 2013 totals and several large venture capital deals in the state surpassed $100 million in value. Total venture capital investments climbed to record levels around $1 billion in 2014.[6] A unique characteristic of venture capital deals in Utah is that much of the capital is flowing to more established companies. This enables further growth, which will sustain the sector's impressive expansion going forward.

The high value of this innovative industry creates jobs that pay 167 percent of Utah's average annual wage.[7] As this rapidly growing industry continues to expand, it will spur growth in other areas. Research has shown that for every one job created in the sector, five more are created in others.[8] It should be noted that the market for tech innovation is global and tech exports from the state led the nation in growth between 2006 and 2012.[9]

Salt Lake City International Airport

In addition to impressive economic activity in the tech sector, large investments were made across the state in other sectors as well. On the public sector side, the most prominent project underway is the terminal redevelopment at Salt Lake City International Airport, which began construction in 2014 and will be completed in 2022. Redevelopment at the airport will allow for 4 million more travelers annually. Additionally, the new configuration will be better suited for hub operations, increase efficiency and provide a world class gateway to the region.

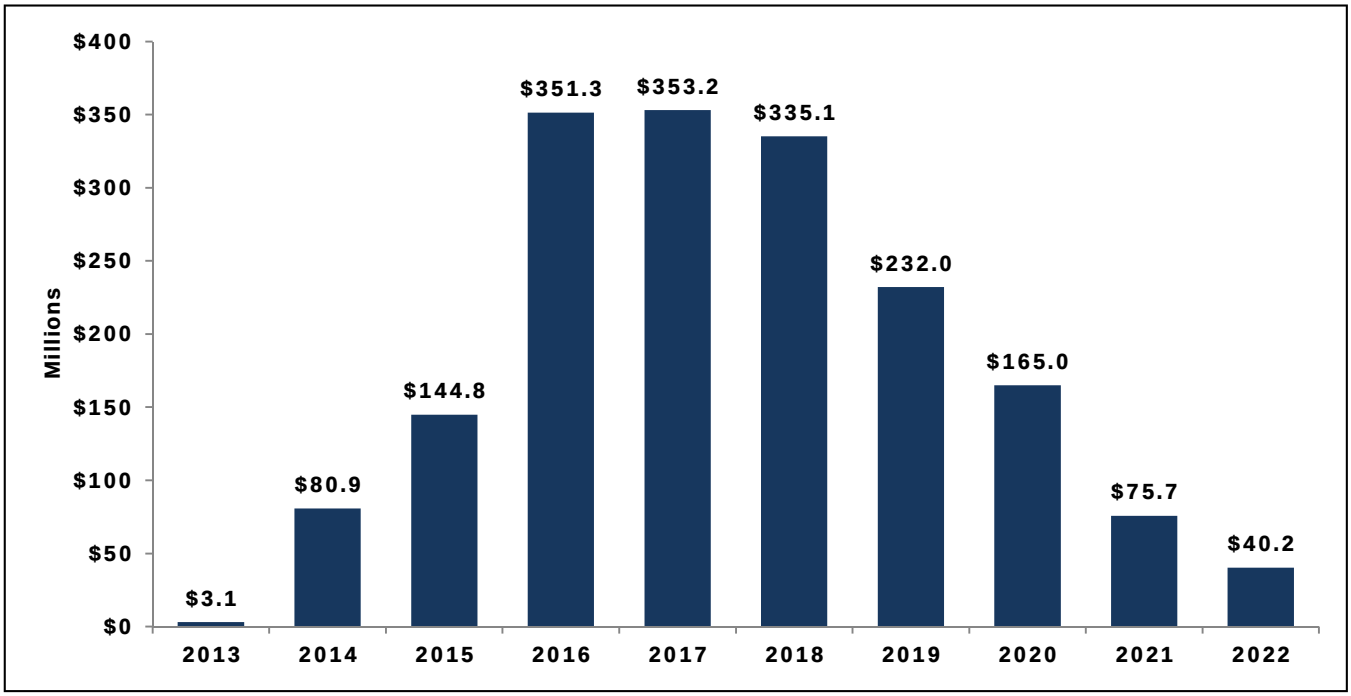
In addition to enabling future growth, the short-term impact of the airport rebuild will positively affect Utah's economy. By the fourth quarter of 2015, expenditures on the project will surpass $20 million per month, a level that will be sustained and exceeded through 2018. The $1.8 billion project will not use additional tax payer funds, but will be paid for by using existing airport funds, bonds, passenger fees, retail rents, and airport usage fees. The short-term impact of the project will be positive and significant. Furthermore, the redeveloped airport facilities will support the Utah economy for decades to come.[10]

Outlook

Overall, 2014 was a good year for Utah's economy. Barring any major disruptions to the global and national economies, the state can look forward to continuing moderate growth and improving economic conditions in 2015. While short-term threats to this outlook have origins far from the region, over the long term, care must be taken to invest in Utah's future. Issues such as preserving quality of life, environment, infrastructure and education are all areas that require a proactive policy stance in order to maintain desirable levels of growth in the future.

5. Wall Street Journal, "Lower Job Churn Hurts Young Workers." June 2014
6. SL Chamber & CBRE, "Moving Forward in a Dynamic Global Environment." 2014.
7. Governor's Office of Economic Development, Software Development and IT. August 2014.
8. Houghton Mifflin Harcourt, "The New Geography of Jobs." 2012
9. Governor's Office of Economic Development, Software Development and IT. August 2014
10. CBRE & SL Chamber, "Moving Forward In a Dynamic Global Environment." 2014

Figure 3.3
Terminal Redevelopment Annual Expenditures



Source: Salt Lake City International Airport

Demographics

As of July 1, 2013, the population of the State of Utah was estimated to be 2,900,872, an increase of 1.6 percent from 2012, according to the U.S. Census Bureau. This is lower than the decade high growth of 3.1 percent experienced in 2005. A total of 46,001 people were added to Utah's population, with 19.9 percent of this increase coming from those moving into the state. Utah's unique characteristics of a high fertility rate and low mortality consistently contribute to strong natural increase, the difference between births and deaths. 51,721 births led to a strong natural increase of 36,848. Deaths within the state totaled 14,873 in 2013. Natural increase accounted for 80.1 percent of total population growth.

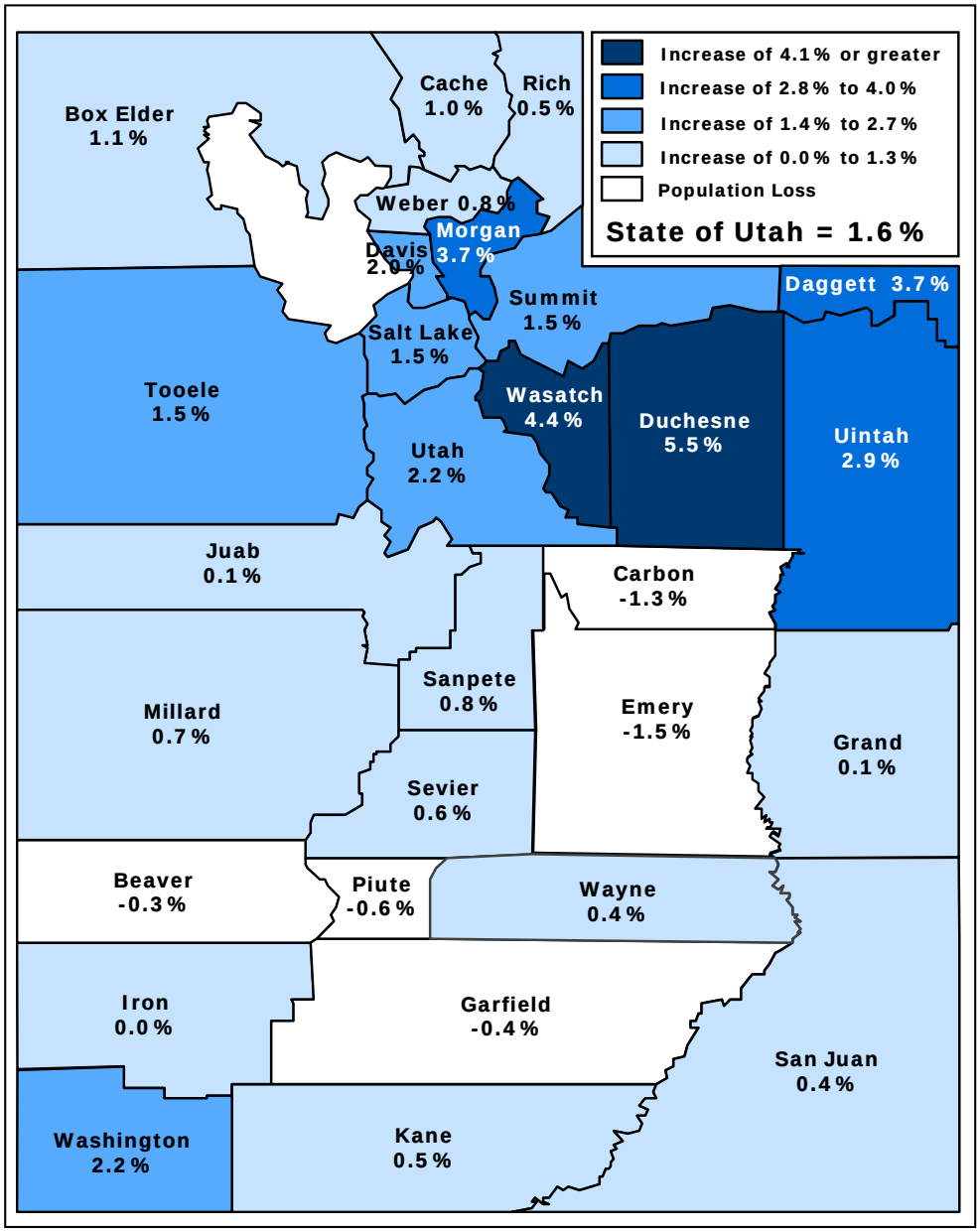
2013 County Population Estimates

Utah's counties experienced varying growth rates in 2013. Differing from the growth pattern of the 2000s, the most rapid growth rates occurred in counties along the Wasatch Back and in the Uintah Basin area of the state, as well as in counties adjacent to larger population centers. Counties that grew faster than the state rate of 1.6 percent were Duchesne, with the highest growth rate of 5.5 percent, followed by Wasatch (4.4 percent), Daggett (3.7 percent), Morgan (3.7 percent), Uintah (2.9 percent), Utah (2.2 percent), Washington (2.2 percent), and Davis (2.0 percent) counties. Five counties had a decrease in population from 2012 to 2013. These counties are located in the central and southwest areas of the state. They are Beaver (-0.3 percent), Garfield (-0.4 percent), Piute (-0.6 percent), Carbon (-1.3 percent), and Emery (-1.5 percent) counties.

Components of Population Change

Annual changes in population are comprised of two components: natural increase and net migration. In 2013, Utah had 51,721 births, below the record of 55,357 set in 2008. Deaths in 2013 totaled 14,873. The resulting natural increase of 36,848 persons accounted for 80.1 percent of Utah's population growth in 2013. This is a decrease from the previous year's share of 90.7 percent but higher than the ten-year average of 77.8 percent. Annual fluctuations in natural increase may result from changes in the size, age structure, and vital rates (fertility and mortality) of the population. The total fertility rate represents the average

Figure 4.1
Utah Population Growth Rates by County: 2012 to 2013



Source: U.S. Census Bureau

number of children expected to be born to a woman during her lifetime. Utah's fertility rate, 2.37 in 2012, continued to be the highest among states.

Net migration is the other component of population change. For a given period, net migration is in-migration minus out-migration, or the number of people moving into the state minus the number of people moving out. Net in-migration in 2013 was 9,153 people, or 19.9 percent of the total population increase.

Urban and Rural

Utah is an urban state with urban issues. According to the 2010 Census, the most recent data on the urban population, 2,503,595 people or 90.6 percent of Utah's population lives in an urban setting, an increase from 88.2 percent in 2000. Utah is the 13th most urban state in the nation. Salt Lake, Utah, Davis, and Weber counties, the four most populated counties, are home to 2,192,225 people or 75.6 percent of Utah's total population.

Utah's Young Population

Utah's population growth rate continues to exceed that of the nation. In comparison to other states, Utah's population is younger, women tend to have more children, households on average are larger, and people tend to live longer. All these factors lead to an age structure that is unique to Utah.

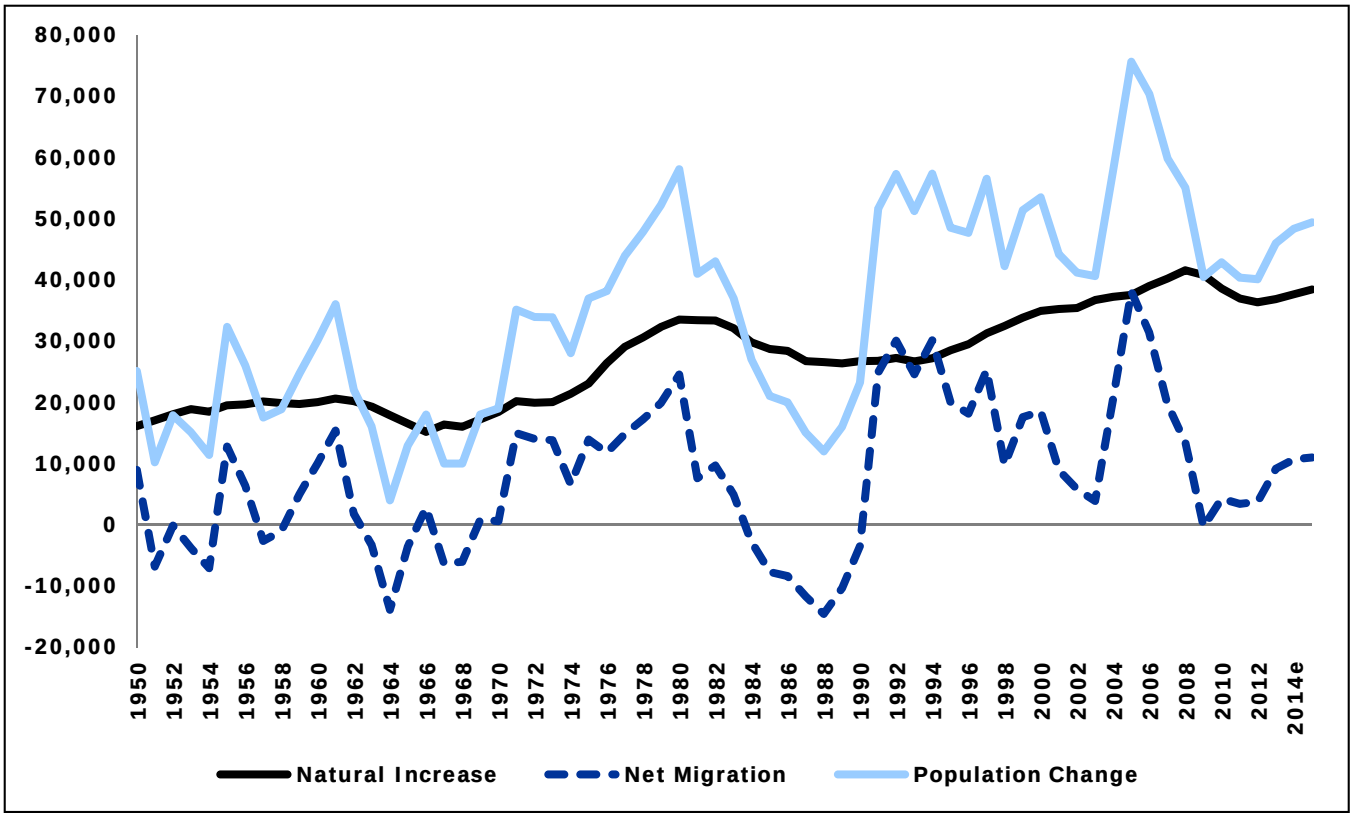
According to U.S. Census Bureau data, in 2013 Utah had the highest share of total population in the preschool age group of any state in the country at 9.3 percent. Utah also ranks first among states with 21.9 percent of its population in the school -age group of 5 to 17. Utah had the smallest working-age population in the nation, with 59.6 percent of Utahns between the ages of 18 and 64. With such a young population, Utah has one of the smallest retirement-age populations, with 9.2 percent of the total population age 65 and older; only the State of Alaska had a smaller share of retirees (8.1 percent).

Another way to look at the age structure of a population is to examine the dependency ratio, which is the number of non-working-age persons (younger than 18 and older than 65) per 100 persons of working-age (18 to 64). Utah's total dependency ratio for 2013 was 68.6, the highest in the nation, compared to a national dependency ratio of 59.8.

2013 City Population Estimates

Salt Lake City continued to be the largest city in the state in 2013, with a population of 191,180, followed by West Valley

Figure 4.2
State of Utah Population Change



Source: Utah Population Estimates Committee, U.S. Census Bureau, State of Utah Revenue Assumptions Working Group

City (133,579), Provo (116,288), West Jordan (110,077), and Orem (91,648). Among the state's cities, with populations greater than 5,000 persons, North Logan was the state's fastest growing municipality with an increase of 10.0 percent from 2012 to 2013, followed by Herriman (7.9 percent), Saratoga Springs (7.6 percent), Roosevelt (6.2 percent) and South Jordan (6.1 percent).

Race and Hispanic Origin Counts

The Hispanic or Latino population in Utah increased 2.6 percent from 377,649 in 2012 to 387,569 in 2013. Utah's Hispanic population as a percent of total has continued to increase, from 4.9 percent in 1990, 9.0 percent in 2000, 13.0 percent in 2010, and 13.4 percent in 2013. Those of Hispanic or Latino origin may be of any race. In 2013, 97.7 percent of Utahns were identified as single race by the Census Bureau. Among those who were of a single race, the majority were White (91.6 percent), followed by Asian (2.3 percent), American Indian and Alaska Native (1.5 percent), Black or African American (1.3 percent), and Native Hawaiian or Other Pacific Islander (1.0 percent).

2015 Outlook

Utah will continue to experience population growth at a rate higher than most states in 2015 on account of strong natural increase in addition to in-migration. Natural increase (births minus deaths) is anticipated to add 38,360 people to Utah's population. While net in-migration slowed during the economic recession, Utah's net migration is projected to increase to approximately 11,000 people.

Figure 4.3
State of Utah Components of Population 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	2,774,424	1.6%	42,864	4,261	38,603	52,898	14,295
2011	2,814,784	1.5%	40,360	3,413	36,947	51,734	14,787
2012	2,854,871	1.4%	40,087	3,731	36,356	51,573	15,217
2013e	2,900,872	1.6%	46,001	9,153	36,848	51,721	14,873
2014f	2,949,213	1.7%	48,341	10,754	37,587	52,844	15,258
2015f	2,998,590	1.7%	49,377	11,017	38,360	54,019	15,659

Notes:

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. The July 1, 2012 estimate was the last produced by Utah Population Estimates Committee. The committee discontinued producing population estimates in July 2014.
4. Data in this table may differ from other tables due to different sources of data or rounding.

Sources:

1. 1980-2009: Utah Population Estimates Committee
2. 2010-2013: U.S. Census Bureau, Population Estimates
3. 2014-2015: State of Utah Revenue Assumptions Working Group
4. Birth and Death: Utah Department of Health

Figure 4.4
Utah Population Estimates by County

County	Census April 1, 2010	July 1, 2010	July 1, 2011	July 1, 2012	July 1, 2013	2012 - 2013 Absolute Change	2012 - 2013 Percent Change	2013 % of Total Population
Beaver	6,629	6,639	6,514	6,480	6,459	-21	-0.3%	0.2%
Box Elder	49,975	50,153	50,249	50,232	50,794	562	1.1%	1.8%
Cache	112,656	113,274	114,700	115,729	116,909	1,180	1.0%	4.0%
Carbon	21,403	21,417	21,333	21,256	20,988	-268	-1.3%	0.7%
Daggett	1,059	1,067	1,155	1,087	1,127	40	3.7%	0.0%
Davis	306,479	307,778	311,812	315,781	322,094	6,313	2.0%	11.1%
Duchesne	18,607	18,620	18,838	19,245	20,308	1,063	5.5%	0.7%
Emery	10,976	10,972	10,948	10,911	10,749	-162	-1.5%	0.4%
Garfield	5,172	5,184	5,176	5,102	5,083	-19	-0.4%	0.2%
Grand	9,225	9,313	9,293	9,347	9,360	13	0.1%	0.3%
Iron	46,163	46,266	46,665	46,773	46,780	7	0.0%	1.6%
Juab	10,246	10,261	10,342	10,342	10,348	6	0.1%	0.4%
Kane	7,125	7,153	7,240	7,227	7,260	33	0.5%	0.3%
Millard	12,503	12,521	12,618	12,570	12,662	92	0.7%	0.4%
Morgan	9,469	9,517	9,641	9,812	10,173	361	3.7%	0.4%
Piute	1,556	1,555	1,520	1,519	1,510	-9	-0.6%	0.1%
Rich	2,264	2,257	2,320	2,277	2,288	11	0.5%	0.1%
Salt Lake	1,029,655	1,032,954	1,048,032	1,064,069	1,079,721	15,652	1.5%	37.2%
San Juan	14,746	14,807	14,767	14,914	14,973	59	0.4%	0.5%
Sanpete	27,822	27,873	28,020	28,011	28,237	226	0.8%	1.0%
Sevier	20,802	20,805	20,912	20,727	20,852	125	0.6%	0.7%
Summit	36,324	36,483	37,447	37,904	38,486	582	1.5%	1.3%
Tooele	58,218	58,498	59,247	59,874	60,762	888	1.5%	2.1%
Uintah	32,588	32,427	33,157	34,540	35,555	1,015	2.9%	1.2%
Utah	516,564	519,605	530,126	539,888	551,891	12,003	2.2%	19.0%
Wasatch	23,530	23,699	24,376	25,311	26,437	1,126	4.4%	0.9%
Washington	138,115	138,429	141,537	144,656	147,800	3,144	2.2%	5.1%
Wayne	2,778	2,767	2,764	2,736	2,747	11	0.4%	0.1%
Weber	231,236	232,130	234,035	236,551	238,519	1,968	0.8%	8.2%
MCD								
Bear River	164,895	165,684	167,269	168,238	169,991	1,753	1.0%	5.9%
Central	75,707	75,782	76,176	75,905	76,356	451	0.6%	2.6%
Mountainland	576,418	579,787	591,949	603,103	616,814	13,711	2.3%	21.3%
Southeastern	56,350	56,509	56,341	56,428	56,070	-358	-0.6%	1.9%
Southwestern	203,204	203,671	207,132	210,238	213,382	3,144	1.5%	7.4%
Uintah Basin	52,254	52,114	53,150	54,872	56,990	2,118	3.9%	2.0%
Wasatch Front	1,635,057	1,640,877	1,662,767	1,686,087	1,711,269	25,182	1.5%	59.0%
State of Utah	2,763,885	2,774,424	2,814,784	2,854,871	2,900,872	46,001	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

Figure 4.5
U.S. Census Bureau National and State Population Estimates

Area	April 1, 2010 Population	Rank	July 1, 2012 Population	Rank	July 1, 2013 Population	Rank	2010-2013 Absolute Change	2010-2013 Percent Change	Percent Change Rank	2012-2013 Absolute Change	2012-2013 Percent Change	Percent Change Rank
U.S.	308,745,538	na	313,873,685	na	316,128,839	na	7,383,301	2.4%	na	2,255,154	0.7%	na
Region												
Northeast	55,317,240	4	55,771,792	4	55,943,073	4	625,833	1.1%	3	171,281	0.3%	4
Midwest	66,927,001	3	67,321,425	3	67,547,890	3	620,889	0.9%	4	226,465	0.3%	3
South	114,555,744	1	117,253,992	1	118,383,453	1	3,827,709	3.3%	1	1,129,461	1.0%	2
West	71,945,553	2	73,526,476	2	74,254,423	2	2,308,870	3.2%	2	727,947	1.0%	1
State												
Alabama	4,779,736	23	4,817,528	23	4,833,722	23	53,986	1.1%	38	16,194	0.3%	35
Alaska	710,231	47	730,307	47	735,132	47	24,901	3.5%	10	4,825	0.7%	27
Arizona	6,392,017	16	6,551,149	15	6,626,624	15	234,607	3.7%	9	75,475	1.2%	9
Arkansas	2,915,918	32	2,949,828	32	2,959,373	32	43,455	1.5%	30	9,545	0.3%	37
California	37,253,956	1	37,999,878	1	38,332,521	1	1,078,565	2.9%	19	332,643	0.9%	20
Colorado	5,029,196	22	5,189,458	22	5,268,367	22	239,171	4.8%	5	78,909	1.5%	4
Connecticut	3,574,097	29	3,591,765	29	3,596,080	29	21,983	0.6%	42	4,315	0.1%	44
Delaware	897,934	45	917,053	45	925,749	45	27,815	3.1%	18	8,696	0.9%	17
District of Columbia	601,723	50	633,427	49	646,449	49	44,726	7.4%	2	13,022	2.1%	2
Florida	18,801,310	4	19,320,749	4	19,552,860	4	751,550	4.0%	6	232,111	1.2%	8
Georgia	9,687,653	9	9,915,646	8	9,992,167	8	304,514	3.1%	17	76,521	0.8%	22
Hawaii	1,360,301	40	1,390,090	40	1,404,054	40	43,753	3.2%	16	13,964	1.0%	15
Idaho	1,567,582	39	1,595,590	39	1,612,136	39	44,554	2.8%	20	16,546	1.0%	13
Illinios	12,830,632	5	12,868,192	5	12,882,135	5	51,503	0.4%	45	13,943	0.1%	46
Indiana	6,483,802	15	6,537,782	16	6,570,902	16	87,100	1.3%	34	33,120	0.5%	30
Iowa	3,046,355	30	3,075,039	30	3,090,416	30	44,061	1.4%	31	15,377	0.5%	31
Kansas	2,853,118	33	2,885,398	33	2,893,957	34	40,839	1.4%	32	8,559	0.3%	39
Kentucky	4,339,367	26	4,379,730	26	4,395,295	26	55,928	1.3%	35	15,565	0.4%	34
Louisiana	4,533,372	25	4,602,134	25	4,625,470	25	92,098	2.0%	29	23,336	0.5%	29
Maine	1,328,361	41	1,328,501	41	1,328,302	41	-59	0.0%	50	-199	0.0%	50
Maryland	5,773,552	19	5,884,868	19	5,928,814	19	155,262	2.7%	21	43,946	0.7%	24
Massachusetts	6,547,629	14	6,645,303	14	6,692,824	14	145,195	2.2%	27	47,521	0.7%	25
Michigan	9,883,640	8	9,882,519	9	9,895,622	9	11,982	0.1%	48	13,103	0.1%	43
Minnesota	5,303,925	21	5,379,646	21	5,420,380	21	116,455	2.2%	28	40,734	0.8%	23
Mississippi	2,967,297	31	2,986,450	31	2,991,207	31	23,910	0.8%	41	4,757	0.2%	40
Missouri	5,988,927	18	6,024,522	18	6,044,171	18	55,244	0.9%	40	19,649	0.3%	36
Montana	989,415	44	1,005,494	44	1,015,165	44	25,750	2.6%	23	9,671	1.0%	16
Nebraska	1,826,341	38	1,855,350	38	1,868,516	37	42,175	2.3%	26	13,166	0.7%	26
Nevada	2,700,551	35	2,754,354	35	2,790,136	35	89,585	3.3%	12	35,782	1.3%	6
New Hampshire	1,316,470	42	1,321,617	42	1,323,459	42	6,989	0.5%	44	1,842	0.1%	42
New Jersey	8,791,894	11	8,867,749	11	8,899,339	11	107,445	1.2%	37	31,590	0.4%	33
New Mexico	2,059,179	36	2,083,540	36	2,085,287	36	26,108	1.3%	36	1,747	0.1%	48
New York	19,378,102	3	19,576,125	3	19,651,127	3	273,025	1.4%	33	75,002	0.4%	32
North Carolina	9,535,483	10	9,748,364	10	9,848,060	10	312,577	3.3%	13	99,696	1.0%	14
North Dakota	672,591	48	701,345	48	723,393	48	50,802	7.6%	1	22,048	3.1%	1
Ohio	11,536,504	7	11,553,031	7	11,570,808	7	34,304	0.3%	46	17,777	0.2%	41
Oklahoma	3,751,351	28	3,815,780	28	3,850,568	28	99,217	2.6%	22	34,788	0.9%	18
Oregon	3,831,074	27	3,899,801	27	3,930,065	27	98,991	2.6%	24	30,264	0.8%	21
Pennsylvania	12,702,379	6	12,764,475	6	12,773,801	6	71,422	0.6%	43	9,326	0.1%	49
Rhode Island	1,052,567	43	1,050,304	43	1,051,511	43	-1,056	-0.1%	51	1,207	0.1%	45
South Carolina	4,625,364	24	4,723,417	24	4,774,839	24	149,475	3.2%	15	51,422	1.1%	11
South Dakota	814,180	46	834,047	46	844,877	46	30,697	3.8%	7	10,830	1.3%	7
Tennessee	6,346,105	17	6,454,914	17	6,495,978	17	149,873	2.4%	25	41,064	0.6%	28
Texas	25,145,561	2	26,060,796	2	26,448,193	2	1,302,632	5.2%	3	387,397	1.5%	5
Utah	**2,763,885**	**34**	**2,854,871**	**34**	**2,900,872**	**33**	**136,987**	**5.0%**	**4**	**46,001**	**1.6%**	**3**
Vermont	625,741	49	625,953	50	626,630	50	889	0.1%	47	677	0.1%	47
Virginia	8,001,024	12	8,186,628	12	8,260,405	12	259,381	3.2%	14	73,777	0.9%	19
Washington	6,724,540	13	6,895,318	13	6,971,406	13	246,866	3.7%	8	76,088	1.1%	10
West Virginia	1,852,994	37	1,856,680	37	1,854,304	38	1,310	0.1%	49	-2,376	-0.1%	51
Wisconsin	5,686,986	20	5,724,554	20	5,742,713	20	55,727	1.0%	39	18,159	0.3%	38
Wyoming	563,626	51	576,626	51	582,658	51	19,032	3.4%	11	6,032	1.0%	12

Source: U.S. Census Bureau

Figure 4.6
Rankings of States by Selected Age Groups as a Percent of Total Population: July 1, 2013

	All Ages		Under Age 5			Ages 5 to 17			Ages 18 to 64			Ages 65+			
Rank	State	Population	State	Population	Percent of Total	State	Population	Percent of Total	State	Population	Percent of Total	State	Population	Percent of Total	State	Median Age
	United States	316,128,839	United States	19,868,088	6.5%	United States	53,717,784	17.3%	United States	197,838,893	63.0%	United States	44,704,074	13.3%	United States	37.6
1	California	38,332,521	**Utah**	**253,867**	**9.3%**	**Utah**	**642,722**	**21.9%**	District of Columbia	461,553	71.6%	Florida	3,647,617	17.6%	Maine	43.9
2	Texas	26,448,193	Texas	1,940,825	7.6%	Idaho	314,294	19.5%	Alaska	480,911	65.9%	Maine	235,067	16.3%	Vermont	42.4
3	New York	19,651,127	Alaska	55,392	7.5%	Texas	5,101,161	19.5%	Vermont	401,456	64.9%	West Virginia	320,041	16.2%	New Hampshire	42.3
4	Florida	19,552,860	Idaho	113,487	7.5%	Alaska	132,740	18.5%	New Hampshire	849,132	64.8%	Pennsylvania	2,091,330	15.6%	West Virginia	41.9
5	Illinois	12,882,135	South Dakota	59,957	7.2%	Georgia	1,821,201	18.4%	Colorado	3,383,044	64.7%	Montana	164,768	15.2%	Florida	41.5
6	Pennsylvania	12,773,801	Nebraska	130,160	7.1%	Mississippi	539,006	18.2%	Massachusetts	4,309,566	64.7%	Vermont	102,473	15.0%	Pennsylvania	40.7
7	Ohio	11,570,808	Kansas	200,406	7.1%	Arizona	1,185,056	18.1%	Virginia	5,290,489	64.6%	Iowa	480,879	14.9%	Connecticut	40.5
8	Georgia	9,992,167	Oklahoma	264,479	7.0%	Kansas	523,686	18.1%	Rhode Island	674,710	64.5%	Hawaii	219,557	14.7%	Montana	39.9
9	Michigan	9,895,622	Mississippi	198,426	7.0%	New Mexico	368,816	17.9%	Maryland	3,789,311	64.4%	Delaware	147,484	14.7%	Rhode Island	39.9
10	North Carolina	9,848,060	New Mexico	138,724	7.0%	Indiana	1,165,212	17.9%	New York	12,578,670	64.3%	Rhode Island	162,814	14.7%	Delaware	39.5
11	New Jersey	8,899,339	Georgia	668,508	7.0%	California	6,667,341	17.9%	Washington	4,424,527	64.2%	Arkansas	454,420	14.6%	Michigan	39.5
12	Virginia	8,260,405	Wyoming	38,347	7.0%	Nebraska	334,188	17.8%	California	24,365,913	63.7%	North Dakota	102,815	14.4%	Massachusetts	39.4
13	Washington	6,971,406	Arizona	431,758	6.9%	Oklahoma	682,548	17.7%	Georgia	6,306,503	63.7%	South Dakota	126,163	14.4%	New Jersey	39.4
14	Massachusetts	6,692,824	Louisiana	308,217	6.9%	Illinois	2,224,288	17.6%	Wyoming	366,290	63.5%	Connecticut	545,671	14.4%	Ohio	39.3
15	Arizona	6,626,624	Nevada	178,194	6.8%	Nevada	483,411	17.5%	North Dakota	457,890	63.5%	Oregon	607,395	14.3%	Oregon	39.0
16	Indiana	6,570,902	California	2,507,536	6.7%	Louisiana	804,740	17.5%	Maine	831,959	63.5%	Ohio	1,752,297	14.3%	Wisconsin	39.0
17	Tennessee	6,495,978	Colorado	335,136	6.7%	Arkansas	516,950	17.5%	Oregon	2,465,064	63.4%	Arizona	1,018,862	14.2%	South Carolina	38.6
18	Missouri	6,044,171	Arkansas	192,916	6.7%	South Dakota	148,002	17.4%	Illinois	8,115,187	63.2%	Missouri	907,777	14.2%	Kentucky	38.5
19	Maryland	5,928,814	Indiana	420,815	6.6%	Colorado	902,796	17.4%	Connecticut	2,264,843	63.2%	South Carolina	727,768	14.1%	Tennessee	38.5
20	Wisconsin	5,742,713	Minnesota	347,567	6.6%	Michigan	1,672,433	17.3%	Nevada	1,747,631	63.2%	Michigan	1,487,593	14.1%	Alabama	38.4
21	Minnesota	5,420,380	North Dakota	48,767	6.6%	Minnesota	931,544	17.3%	New Jersey	5,593,754	63.1%	Alabama	721,166	14.0%	Maryland	38.2
22	Colorado	5,268,367	North Carolina	612,295	6.5%	Ohio	1,959,009	17.2%	Hawaii	877,231	63.1%	Massachusetts	989,312	14.0%	Missouri	38.2
23	Alabama	4,833,722	Iowa	194,726	6.5%	North Carolina	1,673,310	17.2%	Kentucky	2,747,039	63.1%	New Hampshire	203,205	14.0%	New York	38.2
24	South Carolina	4,774,839	Washington	444,620	6.5%	Iowa	529,306	17.1%	North Carolina	6,155,356	63.1%	Wisconsin	849,967	13.9%	Iowa	38.1
25	Louisiana	4,625,470	South Carolina	292,316	6.5%	Alabama	814,377	17.1%	Louisiana	2,899,027	63.0%	Tennessee	952,376	13.7%	North Carolina	38.1
26	Kentucky	4,395,295	Hawaii	90,770	6.4%	Missouri	1,020,848	17.1%	West Virginia	1,152,585	63.0%	New Jersey	1,283,468	13.7%	Hawaii	38.0
27	Oregon	3,930,065	Illinois	799,019	6.4%	New Jersey	1,488,882	17.1%	Minnesota	3,385,192	63.0%	New York	2,832,481	13.7%	Arkansas	37.7
28	Oklahoma	3,850,568	Kentucky	274,874	6.4%	Wisconsin	963,445	17.0%	Tennessee	4,052,025	63.0%	Oklahoma	549,121	13.7%	Minnesota	37.7
29	Connecticut	3,596,080	Missouri	376,837	6.4%	Tennessee	1,091,900	17.0%	Wisconsin	3,584,970	62.9%	Nebraska	264,008	13.6%	Virginia	37.6
30	Iowa	3,090,416	Alabama	297,104	6.3%	Kentucky	739,130	16.9%	South Carolina	2,967,273	62.8%	New Mexico	306,661	13.6%	Washington	37.5
31	Mississippi	2,991,207	Tennessee	399,677	6.3%	Connecticut	593,629	16.9%	Pennsylvania	7,966,826	62.8%	Kentucky	634,252	13.5%	Indiana	37.4
32	Arkansas	2,959,373	Virginia	512,115	6.3%	Maryland	977,312	16.8%	Delaware	574,707	62.7%	Kansas	405,063	13.3%	Illinois	37.2
33	**Utah**	**2,900,872**	Maryland	367,210	6.3%	Wyoming	99,332	16.8%	Michigan	6,162,828	62.7%	North Carolina	1,407,099	13.2%	Nevada	37.2
34	Kansas	2,893,957	Wisconsin	344,331	6.2%	Washington	1,151,175	16.7%	Montana	626,416	62.6%	Indiana	915,033	13.2%	New Mexico	36.9
35	Nevada	2,790,136	Montana	61,272	6.2%	South Carolina	787,482	16.6%	Alabama	3,001,075	62.5%	Minnesota	756,077	13.1%	Arizona	36.8
36	New Mexico	2,085,287	Ohio	690,821	6.2%	Virginia	1,352,420	16.6%	Ohio	7,168,681	62.4%	Mississippi	416,300	13.0%	South Dakota	36.8
37	Nebraska	1,868,516	Delaware	56,319	6.1%	Delaware	147,239	16.4%	Texas	16,440,040	62.3%	Idaho	223,142	12.8%	Wyoming	36.8
38	West Virginia	1,854,304	Oregon	230,022	6.1%	Oregon	627,584	16.2%	Indiana	4,069,842	62.3%	Illinois	1,743,641	12.7%	Mississippi	36.5
39	Idaho	1,612,136	New Jersey	533,235	6.1%	New Hampshire	205,461	16.1%	Missouri	3,738,709	62.3%	Wyoming	78,689	12.7%	Colorado	36.4
40	Hawaii	1,404,054	New York	1,173,627	6.0%	Montana	162,709	16.1%	Mississippi	1,837,475	61.8%	Washington	951,084	12.7%	Nebraska	36.2
41	Maine	1,328,302	Michigan	572,768	5.9%	New York	3,066,349	16.0%	Oklahoma	2,354,420	61.7%	Maryland	794,981	12.5%	Oklahoma	36.2
42	New Hampshire	1,323,459	District of Columbia	40,967	5.9%	Pennsylvania	1,999,741	16.0%	New Mexico	1,271,086	61.5%	Louisiana	613,486	12.5%	Louisiana	36.1
43	Rhode Island	1,051,511	Pennsylvania	715,904	5.7%	Massachusetts	1,028,400	15.8%	Kansas	1,764,802	61.5%	Virginia	1,105,381	12.5%	Kansas	36.0
44	Montana	1,015,165	Florida	1,078,313	5.6%	Hawaii	216,496	15.7%	Nebraska	1,140,160	61.4%	Nevada	380,900	12.5%	Georgia	35.9
45	Delaware	925,749	West Virginia	102,194	5.6%	Rhode Island	159,355	15.6%	Florida	11,878,569	61.4%	California	4,791,731	11.7%	California	35.8
46	South Dakota	844,877	Massachusetts	365,546	5.6%	North Dakota	113,921	15.5%	Iowa	1,885,505	61.4%	District of Columbia	73,422	11.4%	Idaho	35.5
47	Alaska	735,132	Connecticut	191,937	5.5%	Florida	2,948,361	15.3%	Arkansas	1,795,087	61.2%	Colorado	647,391	11.3%	North Dakota	35.3
48	North Dakota	723,393	Rhode Island	54,632	5.3%	Maine	196,262	15.2%	South Dakota	510,755	60.9%	Georgia	1,195,955	11.0%	Texas	34.0
49	District of Columbia	646,449	New Hampshire	65,661	5.1%	West Virginia	279,484	15.2%	Arizona	3,990,948	60.7%	Texas	2,966,167	10.5%	District of Columbia	33.8
50	Vermont	626,630	Maine	65,014	5.1%	Vermont	92,223	15.1%	Idaho	961,213	60.2%	**Utah**	**283,635**	**9.2%**	Alaska	33.2
51	Wyoming	582,658	Vermont	30,478	5.0%	District of Columbia	70,507	11.2%	**Utah**	**1,720,648**	**59.6%**	Alaska	66,089	8.1%	**Utah**	**30.2**

Note: Totals may differ in this table from other tables in this report due to different release dates or data sources.

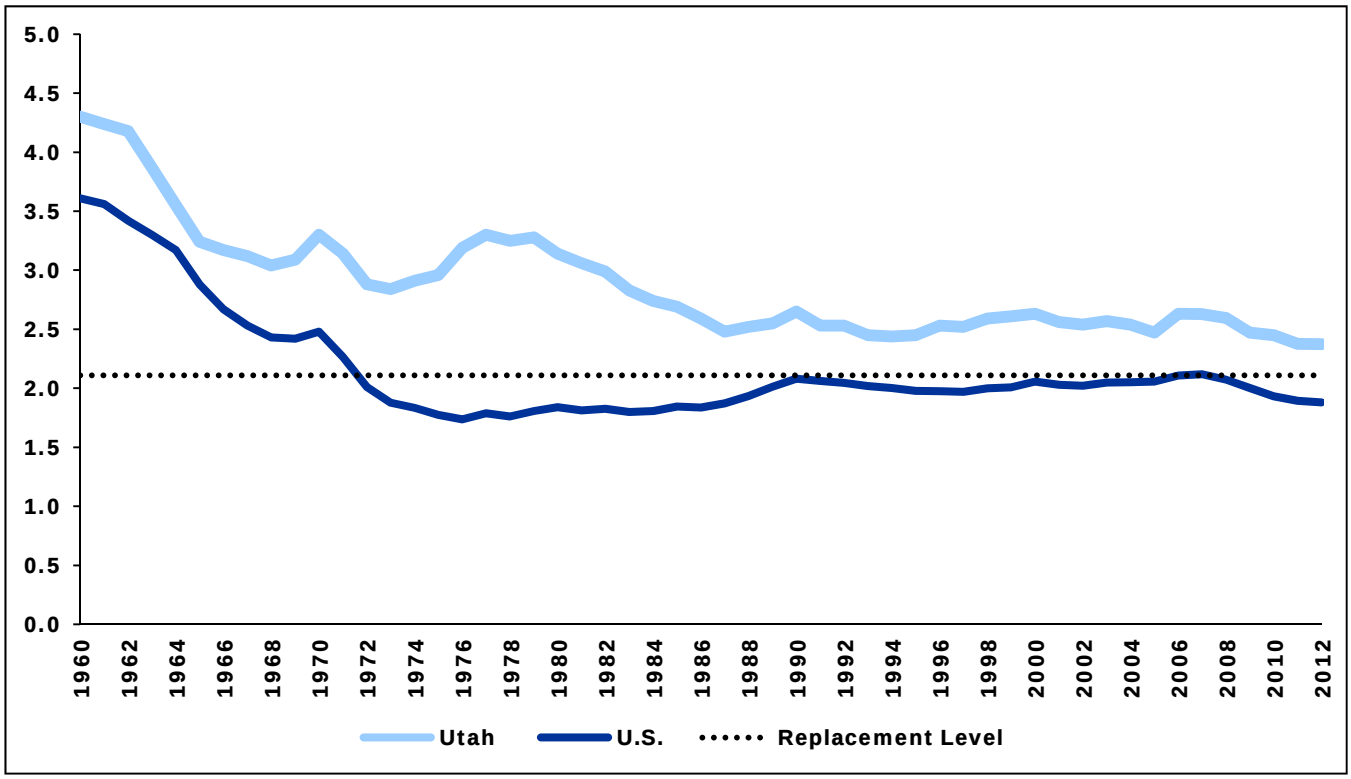
Source: U.S. Census Bureau

Figure 4.7
Dependency Ratios by State: July 1, 2013

Rank	State	Preschool-Age (under age 5) per 100 of Working Age	State	School-Age (5-17) per 100 of Working Age	State	Retirement-Age (65 & over) per 100 of Working Age	State	Total Non-Working Age per 100 of Working Age
	United States	10.0	United States	27.2	United States	22.6	United States	59.8
1	**Utah**	**14.8**	**Utah**	**37.4**	Florida	30.7	**Utah**	**68.6**
2	Idaho	11.8	Idaho	32.7	Maine	28.3	Idaho	67.7
3	Texas	11.8	Texas	31.0	West Virginia	27.8	Arizona	66.0
4	South Dakota	11.7	Arizona	29.7	Montana	26.3	South Dakota	65.4
5	Alaska	11.5	Kansas	29.7	Pennsylvania	26.3	Arkansas	64.9
6	Nebraska	11.4	Mississippi	29.3	Delaware	25.7	Florida	64.6
7	Kansas	11.4	Nebraska	29.3	Arizona	25.5	New Mexico	64.1
8	Oklahoma	11.2	New Mexico	29.0	Vermont	25.5	Kansas	64.0
9	New Mexico	10.9	Oklahoma	29.0	Iowa	25.5	Iowa	63.9
10	Arizona	10.8	South Dakota	29.0	Arkansas	25.3	Nebraska	63.9
11	Mississippi	10.8	Georgia	28.9	Hawaii	25.0	Oklahoma	63.5
12	Arkansas	10.7	Arkansas	28.8	South Dakota	24.7	Mississippi	62.8
13	North Dakota	10.7	Indiana	28.6	Oregon	24.6	Montana	62.1
14	Louisiana	10.6	Iowa	28.1	South Carolina	24.5	Missouri	61.7
15	Georgia	10.6	Louisiana	27.8	Ohio	24.4	Indiana	61.5
16	Wyoming	10.5	Nevada	27.7	Missouri	24.3	Ohio	61.4
17	Hawaii	10.3	Alaska	27.6	Michigan	24.1	Delaware	61.1
18	Indiana	10.3	Minnesota	27.5	Rhode Island	24.1	Alabama	61.1
19	Iowa	10.3	Illinois	27.4	New Mexico	24.1	South Carolina	60.9
20	California	10.3	California	27.4	Connecticut	24.1	West Virginia	60.9
21	Minnesota	10.3	Ohio	27.3	Alabama	24.0	Texas	60.9
22	Nevada	10.2	Missouri	27.3	New Hampshire	23.9	Michigan	60.6
23	Missouri	10.1	North Carolina	27.2	Wisconsin	23.7	Pennsylvania	60.3
24	Washington	10.0	Michigan	27.1	Tennessee	23.5	Tennessee	60.3
25	Kentucky	10.0	Alabama	27.1	Oklahoma	23.3	Wisconsin	60.2
26	North Carolina	9.9	Wyoming	27.1	Idaho	23.2	Minnesota	60.1
27	Colorado	9.9	Tennessee	26.9	Nebraska	23.2	Hawaii	60.1
28	Alabama	9.9	Kentucky	26.9	Kentucky	23.1	Kentucky	60.0
29	Tennessee	9.9	Wisconsin	26.9	Massachusetts	23.0	North Carolina	60.0
30	South Carolina	9.9	Colorado	26.7	Kansas	23.0	Maine	59.7
31	Illinois	9.8	New Jersey	26.6	New Jersey	22.9	Nevada	59.7
32	Delaware	9.8	South Carolina	26.5	North Carolina	22.9	Louisiana	59.6
33	Montana	9.8	Connecticut	26.2	Mississippi	22.7	Oregon	59.4
34	Maryland	9.7	Washington	26.0	New York	22.5	New Jersey	59.1
35	Virginia	9.7	Montana	26.0	Indiana	22.5	Wyoming	59.1
36	Ohio	9.6	Maryland	25.8	North Dakota	22.5	Connecticut	58.8
37	Wisconsin	9.6	Delaware	25.6	Minnesota	22.3	Illinois	58.7
38	New Jersey	9.5	Virginia	25.6	Nevada	21.8	Georgia	58.4
39	Oregon	9.3	Oregon	25.5	Washington	21.5	North Dakota	58.0
40	New York	9.3	Pennsylvania	25.1	Illinois	21.5	Washington	57.6
41	Michigan	9.3	North Dakota	24.9	Wyoming	21.5	California	57.3
42	Florida	9.1	Florida	24.8	Louisiana	21.2	Maryland	56.5
43	Pennsylvania	9.0	Hawaii	24.7	Maryland	21.0	New York	56.2
44	District of Columbia	8.9	New York	24.4	Virginia	20.9	Virginia	56.1
45	West Virginia	8.9	West Virginia	24.2	California	19.7	Vermont	56.1
46	Massachusetts	8.5	New Hampshire	24.2	Colorado	19.1	New Hampshire	55.9
47	Connecticut	8.5	Massachusetts	23.9	Georgia	19.0	Rhode Island	55.8
48	Rhode Island	8.1	Rhode Island	23.6	Texas	18.0	Colorado	55.7
49	Maine	7.8	Maine	23.6	**Utah**	**16.5**	Massachusetts	55.3
50	New Hampshire	7.7	Vermont	23.0	District of Columbia	15.9	Alaska	52.9
51	Vermont	7.6	District of Columbia	15.3	Alaska	13.7	District of Columbia	40.1

Source: U.S. Census Bureau, rate calculated by the Bureau of Economic and Business Research

Figure 4.8
Total Fertility for Utah and the United States



Note: The Replacement Level is the fertility level at which the current population is replaced.
Source: National Center for Health Statistics

Figure 4.9
Total Fertility Rates for Utah and the United States

Year	Utah	U.S.	Year	Utah	U.S.	Year	Utah	U.S.
1960	4.30	3.61	1978	3.25	1.76	1996	2.53	1.98
1961	4.24	3.56	1979	3.28	1.81	1997	2.52	1.97
1962	4.18	3.42	1980	3.14	1.84	1998	2.59	2.00
1963	3.87	3.30	1981	3.06	1.81	1999	2.61	2.01
1964	3.55	3.17	1982	2.99	1.83	2000	2.63	2.06
1965	3.24	2.88	1983	2.83	1.80	2001	2.56	2.03
1966	3.17	2.67	1984	2.74	1.81	2002	2.54	2.02
1967	3.12	2.53	1985	2.69	1.84	2003	2.57	2.05
1968	3.04	2.43	1986	2.59	1.84	2004	2.54	2.05
1969	3.09	2.42	1987	2.48	1.87	2005	2.47	2.06
1970	3.30	2.48	1988	2.52	1.93	2006	2.63	2.11
1971	3.14	2.27	1989	2.55	2.01	2007	2.63	2.12
1972	2.88	2.01	1990	2.65	2.08	2008	2.60	2.07
1973	2.84	1.88	1991	2.53	2.06	2009	2.47	2.00
1974	2.91	1.84	1992	2.53	2.05	2010	2.45	1.93
1975	2.96	1.77	1993	2.45	2.02	2011	2.38	1.89
1976	3.19	1.74	1994	2.44	2.00	2012	2.37	1.88
1977	3.30	1.79	1995	2.45	1.98			

Source: National Center for Health Statistics

Figure 4.10
Housing Units, Households, and Persons Per Household by State

State	2010 Total Housing Units	2010 Total Households	2010 Persons per Household	2010 Rank	2013 Total Housing Units	2013 Total Households	2013 Persons per Household	2013 Rank	2010 to 2013 Percent Change Total Housing Units	2010 to 2013 Percent Change Total Households
United States	131,704,730	116,716,292	2.58	-	132,808,137	116,291,033	2.65	-	0.8%	-0.4%
Alabama	2,171,853	1,883,791	2.48	27	2,190,027	1,822,439	2.59	21	0.8%	-3.3%
Alaska	306,967	258,058	2.65	7	307,417	246,015	2.88	4	0.1%	-4.7%
Arizona	2,844,526	2,380,990	2.63	9	2,892,359	2,400,809	2.70	10	1.7%	0.8%
Arkansas	1,316,299	1,147,084	2.47	33	1,329,777	1,125,899	2.56	26	1.0%	-1.8%
California	13,680,081	12,577,498	2.90	2	13,791,262	12,650,592	2.97	3	0.8%	0.6%
Colorado	2,212,898	1,972,868	2.49	22	2,247,291	2,002,800	2.57	25	1.6%	1.5%
Connecticut	1,487,891	1,371,087	2.52	19	1,488,072	1,339,860	2.60	19	0.0%	-2.3%
Delaware	405,885	342,297	2.55	15	412,015	339,071	2.66	13	1.5%	-0.9%
District of Columbia	296,719	266,707	2.11	51	302,975	271,651	2.23	51	2.1%	1.9%
Florida	8,989,580	7,420,802	2.48	27	9,047,973	7,211,584	2.65	15	0.6%	-2.8%
Georgia	4,088,801	3,585,584	2.63	9	4,110,162	3,546,965	2.74	7	0.5%	-1.1%
Hawaii	519,508	455,338	2.89	3	526,305	450,120	3.02	2	1.3%	-1.1%
Idaho	667,796	579,408	2.66	6	676,192	588,489	2.69	11	1.3%	1.6%
Illinois	5,296,715	4,836,972	2.59	12	5,289,653	4,783,421	2.63	17	-0.1%	-1.1%
Indiana	2,795,541	2,502,154	2.52	19	2,809,640	2,498,395	2.55	27	0.5%	-0.2%
Iowa	1,336,417	1,221,576	2.41	45	1,349,607	1,236,209	2.42	47	1.0%	1.2%
Kansas	1,233,215	1,112,096	2.49	22	1,239,755	1,113,729	2.53	32	0.5%	0.1%
Kentucky	1,927,164	1,719,965	2.45	37	1,936,634	1,705,623	2.50	35	0.5%	-0.8%
Louisiana	1,964,981	1,728,360	2.55	15	1,990,967	1,728,149	2.60	19	1.3%	0.0%
Maine	721,830	557,219	2.32	49	723,140	547,686	2.36	49	0.2%	-1.7%
Maryland	2,378,814	2,156,411	2.61	11	2,404,177	2,161,680	2.68	12	1.1%	0.2%
Massachusetts	2,808,254	2,547,075	2.48	27	2,813,641	2,536,321	2.54	30	0.2%	-0.4%
Michigan	4,532,233	3,872,508	2.49	22	4,525,266	3,832,466	2.52	33	-0.2%	-1.0%
Minnesota	2,347,201	2,087,227	2.48	27	2,368,754	2,119,954	2.49	37	0.9%	1.6%
Mississippi	1,274,719	1,115,768	2.58	13	1,283,192	1,091,002	2.66	13	0.7%	-2.2%
Missouri	2,712,729	2,375,611	2.45	37	2,719,109	2,362,853	2.48	40	0.2%	-0.5%
Montana	482,825	409,607	2.35	47	485,767	406,288	2.43	46	0.6%	-0.8%
Nebraska	796,793	721,130	2.46	35	806,888	730,579	2.49	37	1.3%	1.3%
Nevada	1,173,814	1,006,250	2.65	7	1,186,936	1,002,571	2.75	6	1.1%	-0.4%
New Hampshire	614,754	518,973	2.46	35	616,496	519,246	2.47	41	0.3%	0.1%
New Jersey	3,553,562	3,214,360	2.68	5	3,578,260	3,176,139	2.74	7	0.7%	-1.2%
New Mexico	901,388	791,395	2.55	15	905,134	753,507	2.71	9	0.4%	-4.8%
New York	8,108,103	7,317,755	2.57	14	8,126,399	7,219,356	2.64	16	0.2%	-1.3%
North Carolina	4,327,528	3,745,155	2.48	27	4,394,515	3,757,480	2.55	27	1.5%	0.3%
North Dakota	317,498	281,192	2.30	50	339,293	298,298	2.33	50	6.9%	6.1%
Ohio	5,127,508	4,603,435	2.44	40	5,124,126	4,564,745	2.47	41	-0.1%	-0.8%
Oklahoma	1,664,378	1,460,450	2.49	22	1,682,358	1,447,277	2.58	22	1.1%	-0.9%
Oregon	1,675,562	1,518,938	2.47	33	1,684,107	1,523,799	2.52	33	0.5%	0.3%
Pennsylvania	5,567,315	5,018,904	2.45	37	5,565,354	4,938,894	2.50	35	0.0%	-1.6%
Rhode Island	463,388	413,600	2.44	40	461,658	406,366	2.49	37	-0.4%	-1.7%
South Carolina	2,137,683	1,801,181	2.49	22	2,158,784	1,794,989	2.58	22	1.0%	-0.3%
South Dakota	363,438	322,282	2.42	43	370,207	331,406	2.45	43	1.9%	2.8%
Tennessee	2,812,133	2,493,552	2.48	27	2,840,998	2,490,249	2.55	27	1.0%	-0.1%
Texas	9,977,436	8,922,933	2.75	4	10,256,203	9,110,853	2.84	5	2.8%	2.1%
Utah	979,709	877,692	3.10	1	1,006,164	899,475	3.17	1	2.7%	2.5%
Vermont	322,539	256,442	2.34	48	323,936	253,234	2.37	48	0.4%	-1.3%
Virginia	3,364,939	3,056,058	2.54	18	3,412,577	3,055,863	2.62	18	1.4%	0.0%
Washington	2,885,677	2,620,076	2.51	21	2,928,300	2,644,557	2.58	22	1.5%	0.9%
West Virginia	881,917	763,831	2.36	46	879,424	738,653	2.44	44	-0.3%	-3.3%
Wisconsin	2,624,358	2,279,768	2.43	42	2,633,420	2,289,424	2.44	44	0.3%	0.4%
Wyoming	261,868	226,879	2.42	43	265,471	224,003	2.54	30	1.4%	-1.3%

Note: Numbers may not sum due to rounding.

Sources:
1. U.S. Census Bureau, 2010 Census
2. U.S. Census Bureau, 2013 American Community Survey

Figure 4.11
County Population by Race in Utah: 2013

Geographic Area	Total Population	Total Population by Race: Single Race: Total	White	Black/ African American	American Indian and Alaska Native	Asian	Native Hawaiian and Other Pacific Islander	Total Two or More Races	Hispanic Origin (of any race)	White Non-Hispanic	Total Minority
State	2,900,872	2,834,154	2,658,182	38,149	43,170	66,404	28,249	66,718	387,569	2,312,601	588,271
Percent of Population	100.0%	97.7%	91.6%	1.3%	1.5%	2.3%	1.0%	2.3%	13.4%	79.7%	20.8%
Beaver	6,459	6,363	6,116	23	115	81	28	96	674	5,557	902
Box Elder	50,794	49,887	48,469	246	609	460	103	907	4,547	44,462	6,332
Cache	116,909	114,870	109,522	972	1,076	2,715	585	2,039	11,953	99,085	17,824
Carbon	20,988	20,621	19,956	137	304	183	41	367	2,708	17,502	3,486
Daggett	1,127	1,109	1,082	4	16	6	1	18	48	1,048	79
Davis	322,094	314,245	299,066	4,579	2,100	6,286	2,214	7,849	28,380	274,097	47,997
Duchesne	20,308	19,814	18,596	118	935	86	79	494	1,561	17,372	2,936
Emery	10,749	10,651	10,437	48	104	52	10	98	681	9,820	929
Garfield	5,083	5,018	4,822	25	118	41	12	65	272	4,600	483
Grand	9,360	9,170	8,599	68	404	94	5	190	917	7,814	1,546
Iron	46,780	45,872	43,777	279	1,140	492	184	908	3,800	40,499	6,281
Juab	10,348	10,196	9,983	50	102	39	22	152	466	9,601	747
Kane	7,260	7,161	6,964	28	131	33	5	99	304	6,681	579
Millard	12,662	12,496	12,044	91	238	99	24	166	1,674	10,628	2,034
Morgan	10,173	10,081	9,952	27	39	53	10	92	294	9,695	478
Piute	1,510	1,495	1,468	3	14	8	2	15	122	1,360	150
Rich	2,288	2,269	2,246	0	14	8	1	19	101	2,151	137
Salt Lake	1,079,721	1,052,318	959,797	20,921	14,019	40,165	17,416	27,403	189,707	789,935	289,786
San Juan	14,973	14,637	7,518	57	6,984	66	12	336	737	7,026	7,947
Sanpete	28,237	27,791	26,671	271	451	229	169	446	2,697	24,359	3,878
Sevier	20,852	20,592	20,113	55	308	77	39	260	1,006	19,251	1,601
Summit	38,486	37,911	36,788	256	213	594	60	575	4,363	32,778	5,708
Tooele	60,762	59,478	57,378	497	789	522	292	1,284	7,238	50,852	9,910
Uintah	35,555	34,796	31,507	189	2,760	197	143	759	2,816	29,202	6,353
Utah	551,891	538,868	516,876	4,038	4,469	8,810	4,675	13,023	60,833	461,539	90,352
Wasatch	26,437	26,060	25,387	115	229	280	49	377	3,418	22,315	4,122
Washington	147,800	144,947	138,709	1,227	2,529	1,203	1,279	2,853	14,591	126,269	21,531
Wayne	2,747	2,707	2,646	4	28	22	7	40	147	2,525	222
Weber	238,519	232,731	221,693	3,821	2,932	3,503	782	5,788	41,514	184,578	53,941

Note: As a result of the revised standards for collecting data on race and ethnicity issued by the Office of Management and Budget in 1997, the federal government treats Hispanic origin and race as separate and distinct concepts. Thus Hispanics may be of any race. 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.

Source: U.S. Census Bureau

Figure 4.12
Total Population by City

	April 1, 2010		Population Estimate (July 1)				Change from 2010 Census		Change from 2012 to 2013	
	Census	Estimates Base	2010	2011	2012	2013	Percent	Number	Percent	Number
Utah	2,763,885	2,763,885	2,774,424	2,814,784	2,854,871	2,900,872	5.0%	136,987	1.6%	46,001
Beaver County	6,629	6,629	6,639	6,514	6,480	6,459	-2.6%	-170	-0.3%	-21
Beaver city	3,112	3,108	3,116	3,053	3,053	3,041	-2.3%	-71	-0.4%	-12
Milford city	1,409	1,408	1,408	1,380	1,366	1,360	-3.5%	-49	-0.4%	-6
Minersville town	907	907	907	891	883	882	-2.8%	-25	-0.1%	-1
Balance of Beaver County	1,201	1,206	1,208	1,190	1,178	1,176	-2.1%	-25	-0.2%	-2
Box Elder County	49,975	49,975	50,153	50,249	50,232	50,794	1.6%	819	1.1%	562
Bear River City city	853	853	855	849	838	842	-1.3%	-11	0.5%	4
Brigham City city	17,899	17,908	17,963	18,055	18,199	18,454	3.1%	555	1.4%	255
Corinne city	685	685	689	680	689	688	0.4%	3	-0.1%	-1
Deweyville town	332	332	333	329	326	327	-1.5%	-5	0.3%	1
Elwood town	1,034	1,034	1,039	1,036	1,032	1,034	0.0%	0	0.2%	2
Fielding town	455	453	454	446	439	437	-4.0%	-18	-0.5%	-2
Garland city	2,400	2,428	2,432	2,415	2,388	2,402	0.1%	2	0.6%	14
Honeyville city	1,441	1,441	1,447	1,433	1,421	1,421	-1.4%	-20	0.0%	0
Howell town	245	245	245	245	246	246	0.4%	1	0.0%	0
Mantua town	687	687	688	679	672	676	-1.6%	-11	0.6%	4
Perry city	4,512	4,512	4,526	4,508	4,490	4,531	0.4%	19	0.9%	41
Plymouth town	414	404	405	401	397	395	-4.6%	-19	-0.5%	-2
Portage town	245	245	245	248	245	246	0.4%	1	0.4%	1
Snowville town	167	167	167	168	164	164	-1.8%	-3	0.0%	0
Tremonton city	7,647	7,614	7,660	7,791	7,774	7,903	3.3%	256	1.7%	129
Willard city	1,772	1,772	1,775	1,764	1,751	1,761	-0.6%	-11	0.6%	10
Balance of Box Elder County	9,187	9,195	9,230	9,202	9,161	9,267	0.9%	80	1.2%	106
Cache County	112,656	112,656	113,274	114,700	115,729	116,909	3.8%	4,253	1.0%	1,180
Amalga town	488	488	490	492	495	493	1.0%	5	-0.4%	-2
Clarkston town	666	666	668	673	675	666	0.0%	0	-1.3%	-9
Cornish town	288	289	290	293	295	296	2.8%	8	0.3%	1
Hyde Park city	3,833	3,830	3,869	3,967	4,062	4,145	8.1%	312	2.0%	83
Hyrum city	7,609	7,609	7,653	7,719	7,765	7,745	1.8%	136	-0.3%	-20
Lewiston city	1,766	1,766	1,780	1,779	1,777	1,759	-0.4%	-7	-1.0%	-18
Logan city	48,174	48,174	48,375	49,020	49,017	48,913	1.5%	739	-0.2%	-104
Mendon city	1,282	1,282	1,286	1,281	1,275	1,267	-1.2%	-15	-0.6%	-8
Millville city	1,829	1,837	1,846	1,862	1,872	1,869	2.2%	40	-0.2%	-3
Newton town	789	789	791	788	789	782	-0.9%	-7	-0.9%	-7
Nibley city	5,438	5,438	5,530	5,720	5,828	5,938	9.2%	500	1.9%	110
North Logan city	8,269	8,269	8,306	8,375	8,780	9,659	16.8%	1,390	10.0%	879
Paradise town	904	904	910	919	924	922	2.0%	18	-0.2%	-2
Providence city	7,075	6,989	7,020	7,039	7,049	7,033	-0.6%	-42	-0.2%	-16
Richmond city	2,470	2,476	2,490	2,509	2,523	2,515	1.8%	45	-0.3%	-8
River Heights city	1,734	1,822	1,830	1,847	1,857	1,852	6.8%	118	-0.3%	-5
Smithfield city	9,495	9,628	9,683	9,869	10,132	10,466	10.2%	971	3.3%	334
Trenton town	464	464	465	468	470	469	1.1%	5	-0.2%	-1
Wellsville city	3,432	3,432	3,452	3,482	3,504	3,495	1.8%	63	-0.3%	-9
Balance of Cache County	6,651	6,504	6,540	6,598	6,640	6,625	-0.4%	-26	-0.2%	-15
Carbon County	21,403	21,403	21,417	21,333	21,256	20,988	-1.9%	-415	-1.3%	-268
East Carbon city	1,301	1,301	1,300	1,290	1,281	1,263	-2.9%	-38	-1.4%	-18
Helper city	2,201	2,196	2,200	2,196	2,192	2,171	-1.4%	-30	-1.0%	-21
Price city	8,715	8,715	8,717	8,667	8,627	8,491	-2.6%	-224	-1.6%	-136
Scofield town	24	24	24	24	24	23	-4.2%	-1	-4.2%	-1
Sunnyside city	377	377	377	376	375	371	-1.6%	-6	-1.1%	-4
Wellington city	1,676	1,676	1,677	1,677	1,674	1,659	-1.0%	-17	-0.9%	-15
Balance of Carbon County	7,109	7,114	7,122	7,103	7,083	7,010	-1.4%	-99	-1.0%	-73
Daggett County	1,059	1,061	1,067	1,155	1,087	1,127	6.4%	68	3.7%	40
Manila town	310	310	311	333	309	322	3.9%	12	4.2%	13
Balance of Daggett County	749	751	756	822	778	805	7.5%	56	3.5%	27
Davis County	306,479	306,479	307,778	311,812	315,781	322,094	5.1%	15,615	2.0%	6,313
Bountiful city	42,552	42,561	42,657	42,851	42,919	43,023	1.1%	471	0.2%	104
Centerville city	15,335	15,326	15,378	15,579	16,205	16,624	8.4%	1,289	2.6%	419

Figure 4.12
Total Population by City

	April 1, 2010		Population Estimate (July 1)				Change from 2010 Census		Change from 2012 to 2013	
	Census	Estimates Base	2010	2011	2012	2013	Percent	Number	Percent	Number
Clearfield city	30,112	30,118	30,198	30,391	30,396	30,467	1.2%	355	0.2%	71
Clinton city	20,426	20,426	20,508	20,690	20,809	20,924	2.4%	498	0.6%	115
Farmington city	18,275	18,275	18,462	19,313	20,753	21,599	18.2%	3,324	4.1%	846
Fruit Heights city	4,987	4,987	5,002	5,064	5,299	5,595	12.2%	608	5.6%	296
Kaysville city	27,300	27,410	27,529	28,097	28,400	28,876	5.8%	1,576	1.7%	476
Layton city	67,311	67,296	67,551	68,213	68,603	70,790	5.2%	3,479	3.2%	2,187
North Salt Lake city	16,322	16,322	16,419	16,567	16,682	17,017	4.3%	695	2.0%	335
South Weber city	6,051	6,051	6,080	6,209	6,377	6,525	7.8%	474	2.3%	148
Sunset city	5,122	5,122	5,132	5,146	5,140	5,137	0.3%	15	-0.1%	-3
Syracuse city	24,331	24,369	24,505	24,860	25,163	25,775	5.9%	1,444	2.4%	612
West Bountiful city	5,265	5,265	5,281	5,314	5,332	5,374	2.1%	109	0.8%	42
West Point city	9,511	9,511	9,562	9,757	9,822	9,936	4.5%	425	1.2%	114
Woods Cross city	9,761	9,761	9,829	10,083	10,212	10,756	10.2%	995	5.3%	544
Balance of Davis County	3,818	3,679	3,685	3,678	3,669	3,676	-3.7%	-142	0.2%	7
Duchesne County	18,607	18,607	18,620	18,838	19,245	20,308	9.1%	1,701	5.5%	1,063
Altamont town	225	228	228	230	234	248	10.2%	23	6.0%	14
Duchesne city	1,690	1,688	1,689	1,697	1,721	1,799	6.4%	109	4.5%	78
Myton city	569	569	568	572	582	604	6.2%	35	3.8%	22
Roosevelt city	6,046	6,049	6,064	6,171	6,353	6,750	11.6%	704	6.2%	397
Tabiona town	171	171	171	172	175	184	7.6%	13	5.1%	9
Balance of Duchesne County	9,906	9,902	9,900	9,996	10,180	10,723	8.2%	817	5.3%	543
Emery County	10,976	10,976	10,972	10,948	10,911	10,749	-2.1%	-227	-1.5%	-162
Castle Dale city	1,630	1,638	1,637	1,637	1,630	1,605	-1.5%	-25	-1.5%	-25
Clawson town	163	199	199	199	201	201	23.3%	38	0.0%	0
Cleveland town	464	464	464	466	467	460	-0.9%	-4	-1.5%	-7
Elmo town	418	423	423	425	424	426	1.9%	8	0.5%	2
Emery town	288	286	286	283	285	279	-3.1%	-9	-2.1%	-6
Ferron city	1,626	1,666	1,665	1,660	1,656	1,624	-0.1%	-2	-1.9%	-32
Green River city	952	952	949	948	945	929	-2.4%	-23	-1.7%	-16
Huntington city	2,129	2,138	2,140	2,132	2,113	2,075	-2.5%	-54	-1.8%	-38
Orangeville city	1,470	1,470	1,472	1,465	1,463	1,439	-2.1%	-31	-1.6%	-24
Balance of Emery County	1,836	1,740	1,737	1,733	1,727	1,711	-6.8%	-125	-0.9%	-16
Garfield County	5,172	5,172	5,184	5,176	5,102	5,083	-1.7%	-89	-0.4%	-19
Antimony town	122	122	122	122	120	119	-2.5%	-3	-0.8%	-1
Boulder town	226	226	227	225	221	222	-1.8%	-4	0.5%	1
Bryce Canyon City town	198	198	198	199	197	197	-0.5%	-1	0.0%	0
Cannonville town	167	167	167	166	164	162	-3.0%	-5	-1.2%	-2
Escalante city	797	797	798	796	784	779	-2.3%	-18	-0.6%	-5
Hatch town	133	146	146	146	143	142	6.8%	9	-0.7%	-1
Henrieville town	230	230	231	229	225	223	-3.0%	-7	-0.9%	-2
Panguitch city	1,520	1,523	1,528	1,526	1,509	1,507	-0.9%	-13	-0.1%	-2
Tropic town	530	530	531	531	521	519	-2.1%	-11	-0.4%	-2
Balance of Garfield County	1,249	1,233	1,236	1,236	1,218	1,213	-2.9%	-36	-0.4%	-5
Grand County	9,225	9,225	9,313	9,293	9,347	9,360	1.5%	135	0.1%	13
Castle Valley town	319	322	326	327	329	332	4.1%	13	0.9%	3
Moab city	5,046	5,071	5,117	5,101	5,131	5,130	1.7%	84	0.0%	-1
Balance of Grand County	3,860	3,832	3,870	3,865	3,887	3,898	1.0%	38	0.3%	11
Iron County	46,163	46,163	46,266	46,665	46,773	46,780	1.3%	617	0.0%	7
Brian Head town	83	85	86	86	86	86	3.6%	3	0.0%	0
Cedar City city	28,857	28,857	28,927	29,182	29,165	29,162	1.1%	305	0.0%	-3
Enoch city	5,803	5,803	5,824	5,928	5,989	6,005	3.5%	202	0.3%	16
Kanarraville town	355	355	355	356	356	360	1.4%	5	1.1%	4
Paragonah town	488	488	488	490	493	493	1.0%	5	0.0%	0
Parowan city	2,790	2,792	2,796	2,809	2,829	2,829	1.4%	39	0.0%	0
Balance of Iron County	7,787	7,783	7,790	7,814	7,855	7,845	0.7%	58	-0.1%	-10
Juab County	10,246	10,246	10,261	10,342	10,342	10,348	1.0%	102	0.1%	6
Eureka city	669	669	670	669	665	662	-1.0%	-7	-0.5%	-3
Levan town	841	841	842	856	854	854	1.5%	13	0.0%	0
Mona city	1,547	1,547	1,549	1,561	1,562	1,569	1.4%	22	0.4%	7

Figure 4.12
Total Population by City

	April 1, 2010		Population Estimate (July 1)				Change from 2010 Census		Change from 2012 to 2013	
	Census	Estimates Base	2010	2011	2012	2013	Percent	Number	Percent	Number
Nephi city	5,389	5,385	5,394	5,440	5,440	5,446	1.1%	57	0.1%	6
Rocky Ridge town	733	733	734	735	735	731	-0.3%	-2	-0.5%	-4
Santaquin city (pt.)	0	0	0	0	0	0	-	0	-	0
Balance of Juab County	1,067	1,071	1,072	1,081	1,086	1,086	1.8%	19	0.0%	0
Kane County	7,125	7,125	7,153	7,240	7,227	7,260	1.9%	135	0.5%	33
Alton town	119	119	119	121	119	119	0.0%	0	0.0%	0
Big Water town	475	475	476	479	471	468	-1.5%	-7	-0.6%	-3
Glendale town	381	381	382	386	381	377	-1.0%	-4	-1.0%	-4
Kanab city	4,312	4,324	4,343	4,394	4,423	4,468	3.6%	156	1.0%	45
Orderville town	577	577	579	587	578	575	-0.3%	-2	-0.5%	-3
Balance of Kane County	1,261	1,249	1,254	1,273	1,255	1,253	-0.6%	-8	-0.2%	-2
Millard County	12,503	12,503	12,521	12,618	12,570	12,662	1.3%	159	0.7%	92
Delta city	3,436	3,436	3,442	3,472	3,458	3,485	1.4%	49	0.8%	27
Fillmore city	2,435	2,461	2,463	2,484	2,491	2,499	2.6%	64	0.3%	8
Hinckley town	696	696	697	701	696	704	1.1%	8	1.1%	8
Holden town	378	378	378	380	376	378	0.0%	0	0.5%	2
Kanosh town	474	474	475	477	473	476	0.4%	2	0.6%	3
Leamington town	226	226	226	228	228	230	1.8%	4	0.9%	2
Lynndyl town	106	106	106	107	107	110	3.8%	4	2.8%	3
Meadow town	310	310	310	311	308	309	-0.3%	-1	0.3%	1
Oak City town	578	578	581	587	582	592	2.4%	14	1.7%	10
Scipio town	327	327	327	328	327	329	0.6%	2	0.6%	2
Balance of Millard County	3,537	3,511	3,516	3,543	3,524	3,550	0.4%	13	0.7%	26
Morgan County	9,469	9,469	9,517	9,641	9,812	10,173	7.4%	704	3.7%	361
Morgan city	3,687	3,683	3,693	3,698	3,724	3,903	5.9%	216	4.8%	179
Balance of Morgan County	5,782	5,786	5,824	5,943	6,088	6,270	8.4%	488	3.0%	182
Piute County	1,556	1,556	1,555	1,520	1,519	1,510	-3.0%	-46	-0.6%	-9
Circleville town	547	547	546	535	535	530	-3.1%	-17	-0.9%	-5
Junction town	191	191	191	187	187	185	-3.1%	-6	-1.1%	-2
Kingston town	173	173	173	169	169	168	-2.9%	-5	-0.6%	-1
Marysvale town	408	399	399	388	387	387	-5.1%	-21	0.0%	0
Balance of Piute County	237	246	246	241	241	240	1.3%	3	-0.4%	-1
Rich County	2,264	2,264	2,257	2,320	2,277	2,288	1.1%	24	0.5%	11
Garden City town	562	561	562	580	571	574	2.1%	12	0.5%	3
Laketown town	248	250	249	256	252	255	2.8%	7	1.2%	3
Randolph town	464	464	461	473	463	462	-0.4%	-2	-0.2%	-1
Woodruff town	180	180	179	185	181	182	1.1%	2	0.6%	1
Balance of Rich County	810	809	806	826	810	815	0.6%	5	0.6%	5
Salt Lake County	1,029,655	1,029,655	1,032,954	1,048,032	1,064,069	1,079,721	4.9%	50,066	1.5%	15,652
Alta town	383	383	383	386	388	390	1.8%	7	0.5%	2
Bluffdale city (pt.)	7,598	7,597	7,606	7,765	7,971	8,387	10.4%	789	5.2%	416
Cottonwood Heights city	33,433	33,433	33,445	33,744	34,022	34,238	2.4%	805	0.6%	216
Draper city (pt.)	40,532	40,532	40,668	41,485	42,368	43,395	7.1%	2,863	2.4%	1,027
Herriman city	21,785	21,785	22,538	23,400	24,429	26,362	21.0%	4,577	7.9%	1,933
Holladay city	26,472	26,472	26,482	26,720	26,949	27,137	2.5%	665	0.7%	188
Midvale city	27,964	27,948	28,269	28,621	30,245	30,764	10.0%	2,800	1.7%	519
Murray city	46,746	46,746	46,777	47,210	48,261	48,612	4.0%	1,866	0.7%	351
Riverton city	38,753	38,754	38,891	39,536	40,416	40,921	5.6%	2,168	1.2%	505
Salt Lake City city	186,440	186,443	186,505	188,091	189,462	191,180	2.5%	4,740	0.9%	1,718
Sandy city	87,461	87,710	87,760	88,648	89,521	90,231	3.2%	2,770	0.8%	710
South Jordan city	50,418	50,418	51,258	53,347	55,960	59,366	17.7%	8,948	6.1%	3,406
South Salt Lake city	23,617	23,617	23,690	23,999	24,350	24,702	4.6%	1,085	1.4%	352
Taylorsville city	58,652	58,656	58,715	59,740	60,191	60,519	3.2%	1,867	0.5%	328
West Jordan city	103,712	103,708	104,136	106,548	108,346	110,077	6.1%	6,365	1.6%	1,731
West Valley City city	129,480	129,480	129,616	130,994	132,349	133,579	3.2%	4,099	0.9%	1,230
Balance of Salt Lake County	146,209	145,973	146,215	147,798	148,841	149,861	2.5%	3,652	0.7%	1,020
San Juan County	14,746	14,746	14,807	14,767	14,914	14,973	1.5%	227	0.4%	59
Blanding city	3,375	3,375	3,389	3,389	3,494	3,581	6.1%	206	2.5%	87

Figure 4.12
Total Population by City

	April 1, 2010		Population Estimate (July 1)				Change from 2010 Census		Change from 2012 to 2013	
	Census	Estimates Base	2010	2011	2012	2013	Percent	Number	Percent	Number
Monticello city	1,972	1,975	1,983	1,973	1,978	1,975	0.2%	3	-0.2%	-3
Balance of San Juan County	9,399	9,396	9,435	9,405	9,442	9,417	0.2%	18	-0.3%	-25
Sanpete County	27,822	27,822	27,873	28,020	28,011	28,237	1.5%	415	0.8%	226
Centerfield town	1,367	1,367	1,370	1,375	1,375	1,376	0.7%	9	0.1%	1
Ephraim city	6,135	6,131	6,142	6,211	6,223	6,431	4.8%	296	3.3%	208
Fairview city	1,247	1,247	1,249	1,254	1,254	1,255	0.6%	8	0.1%	1
Fayette town	242	242	242	243	244	244	0.8%	2	0.0%	0
Fountain Green city	1,071	1,071	1,073	1,077	1,077	1,078	0.7%	7	0.1%	1
Gunnison city	3,285	3,285	3,289	3,298	3,264	3,269	-0.5%	-16	0.2%	5
Manti city	3,276	3,280	3,287	3,299	3,305	3,307	0.9%	31	0.1%	2
Mayfield town	496	496	497	499	500	500	0.8%	4	0.0%	0
Moroni city	1,423	1,423	1,426	1,431	1,432	1,433	0.7%	10	0.1%	1
Mount Pleasant city	3,260	3,259	3,265	3,276	3,278	3,280	0.6%	20	0.1%	2
Spring City city	988	988	990	994	994	994	0.6%	6	0.0%	0
Sterling town	262	272	273	274	274	275	5.0%	13	0.4%	1
Wales town	302	295	295	297	297	297	-1.7%	-5	0.0%	0
Balance of Sanpete County	4,468	4,466	4,475	4,492	4,494	4,498	0.7%	30	0.1%	4
Sevier County	20,802	20,802	20,805	20,912	20,727	20,852	0.2%	50	0.6%	125
Annabella town	795	795	795	801	794	799	0.5%	4	0.6%	5
Aurora city	1,016	1,016	1,016	1,023	1,014	1,019	0.3%	3	0.5%	5
Central Valley town	528	546	546	548	543	546	3.4%	18	0.6%	3
Elsinore town	847	847	847	853	845	850	0.4%	3	0.6%	5
Glenwood town	464	464	464	468	464	467	0.6%	3	0.6%	3
Joseph town	344	344	344	345	342	344	0.0%	0	0.6%	2
Koosharem town	327	327	327	322	314	319	-2.4%	-8	1.6%	5
Monroe city	2,256	2,256	2,258	2,272	2,255	2,267	0.5%	11	0.5%	12
Redmond town	730	730	730	733	732	738	1.1%	8	0.8%	6
Richfield city	7,551	7,557	7,554	7,588	7,512	7,555	0.1%	4	0.6%	43
Salina city	2,489	2,489	2,491	2,506	2,487	2,503	0.6%	14	0.6%	16
Sigurd town	429	431	431	433	429	431	0.5%	2	0.5%	2
Balance of Sevier County	3,026	3,000	3,002	3,020	2,996	3,014	-0.4%	-12	0.6%	18
Summit County	36,324	36,324	36,483	37,447	37,904	38,486	6.0%	2,162	1.5%	582
Coalville city	1,363	1,369	1,369	1,389	1,393	1,404	3.0%	41	0.8%	11
Francis town	1,077	1,077	1,082	1,108	1,118	1,140	5.8%	63	2.0%	22
Henefer town	766	761	766	783	799	814	6.3%	48	1.9%	15
Kamas city	1,811	1,811	1,820	1,854	1,891	1,921	6.1%	110	1.6%	30
Oakley city	1,470	1,470	1,476	1,503	1,517	1,544	5.0%	74	1.8%	27
Park City city (pt.)	7,547	7,547	7,616	7,764	7,848	7,950	5.3%	403	1.3%	102
Balance of Summit County	22,290	22,289	22,354	23,046	23,338	23,713	6.4%	1,423	1.6%	375
Tooele County	58,218	58,218	58,498	59,247	59,874	60,762	4.4%	2,544	1.5%	888
Grantsville city	8,893	8,911	8,958	9,110	9,399	9,617	8.1%	724	2.3%	218
Ophir town	38	38	38	38	38	40	5.3%	2	5.3%	2
Rush Valley town	447	447	451	456	462	474	6.0%	27	2.6%	12
Stockton town	616	616	618	617	616	616	0.0%	0	0.0%	0
Tooele city	31,605	31,588	31,711	32,043	32,099	32,342	2.3%	737	0.8%	243
Vernon town	243	243	244	247	250	257	5.8%	14	2.8%	7
Wendover city	1,400	1,400	1,402	1,395	1,392	1,394	-0.4%	-6	0.1%	2
Balance of Tooele County	14,976	14,975	15,076	15,341	15,618	16,022	7.0%	1,046	2.6%	404
Uintah County	32,588	32,586	32,427	33,157	34,540	35,555	9.1%	2,967	2.9%	1,015
Ballard town	801	801	802	828	871	906	13.1%	105	4.0%	35
Naples city	1,755	1,741	1,742	1,784	1,868	2,032	15.8%	277	8.8%	164
Vernal city	9,089	9,089	9,030	9,213	9,830	10,344	13.8%	1,255	5.2%	514
Balance of Uintah County	20,943	20,955	20,853	21,332	21,971	22,273	6.4%	1,330	1.4%	302
Utah County	516,564	516,564	519,605	530,126	539,888	551,891	6.8%	35,327	2.2%	12,003
Alpine city	9,555	9,557	9,598	9,733	9,853	10,024	4.9%	469	1.7%	171
American Fork city	26,263	26,439	26,563	26,993	27,307	27,813	5.9%	1,550	1.9%	506
Bluffdale city (pt.)	-	-	-	-	-	-	-	-	-	-
Cedar Fort town	368	368	369	373	375	378	2.7%	10	0.8%	3
Cedar Hills city	9,796	9,756	9,798	9,910	10,038	10,179	3.9%	383	1.4%	141

Figure 4.12
Total Population by City

	April 1, 2010		Population Estimate (July 1)				Change from 2010 Census		Change from 2012 to 2013	
	Census	Estimates Base	2010	2011	2012	2013	Percent	Number	Percent	Number
Draper city (pt.)	1,742	1,742	1,755	1,795	1,835	1,890	8.5%	148	3.0%	55
Eagle Mountain city	21,415	21,415	21,696	22,676	23,211	24,217	13.1%	2,802	4.3%	1,006
Elk Ridge city	2,436	2,436	2,457	2,534	2,690	2,850	17.0%	414	5.9%	160
Fairfield town	119	119	119	120	121	122	2.5%	3	0.8%	1
Genola town	1,370	1,370	1,375	1,385	1,390	1,397	2.0%	27	0.5%	7
Goshen town	921	921	925	927	927	935	1.5%	14	0.9%	8
Highland city	15,523	15,507	15,580	16,010	16,421	17,011	9.6%	1,488	3.6%	590
Lehi city	47,407	47,735	48,123	49,757	51,540	54,382	14.7%	6,975	5.5%	2,842
Lindon city	10,070	10,085	10,135	10,289	10,450	10,611	5.4%	541	1.5%	161
Mapleton city	7,979	8,029	8,082	8,291	8,491	8,784	10.1%	805	3.5%	293
Orem city	88,328	88,320	88,671	89,616	90,684	91,648	3.8%	3,320	1.1%	964
Payson city	18,294	18,335	18,436	18,749	18,950	19,154	4.7%	860	1.1%	204
Pleasant Grove city	33,509	33,540	33,704	34,127	34,519	34,988	4.4%	1,479	1.4%	469
Provo city	112,488	112,495	112,879	114,607	115,441	116,288	3.4%	3,800	0.7%	847
Salem city	6,423	6,423	6,455	6,605	6,755	6,928	7.9%	505	2.6%	173
Santaquin city (pt.)	9,128	9,137	9,228	9,514	9,668	9,843	7.8%	715	1.8%	175
Saratoga Springs city	17,781	17,802	18,038	19,056	21,147	22,749	27.9%	4,968	7.6%	1,602
Spanish Fork city	34,691	34,740	35,073	35,784	36,280	36,956	6.5%	2,265	1.9%	676
Springville city	29,466	29,500	29,703	30,274	30,625	31,205	5.9%	1,739	1.9%	580
Vineyard town	139	140	143	177	232	465	234.5%	326	100.4%	233
Woodland Hills city	1,344	1,344	1,353	1,380	1,405	1,436	6.8%	92	2.2%	31
Balance of Utah County	10,009	9,309	9,347	9,444	9,533	9,638	-3.7%	-371	1.1%	105
Wasatch County	23,530	23,530	23,699	24,376	25,311	26,437	12.4%	2,907	4.4%	1,126
Charleston town	415	417	419	426	434	445	7.2%	30	2.5%	11
Daniel town	938	938	943	994	1,013	1,037	10.6%	99	2.4%	24
Heber city	11,362	11,365	11,458	11,694	12,275	12,911	13.6%	1,549	5.2%	636
Hideout town	656	656	660	666	679	695	5.9%	39	2.4%	16
Independence town	164	164	165	167	170	174	6.1%	10	2.4%	4
Midway city	3,845	3,845	3,870	3,917	4,030	4,196	9.1%	351	4.1%	166
Park City city (pt.)	11	11	11	11	12	12	9.1%	1	0.0%	0
Wallsburg town	250	250	252	264	272	284	13.6%	34	4.4%	12
Balance of Wasatch County	5,889	5,884	5,921	6,237	6,426	6,683	13.5%	794	4.0%	257
Washington County	138,115	138,115	138,429	141,537	144,656	147,800	7.0%	9,685	2.2%	3,144
Apple Valley town	701	701	701	710	719	720	2.7%	19	0.1%	1
Enterprise city	1,711	1,711	1,715	1,736	1,753	1,758	2.7%	47	0.3%	5
Hildale city	2,726	2,736	2,765	2,905	2,923	2,916	7.0%	190	-0.2%	-7
Hurricane city	13,748	13,748	13,785	14,009	14,306	14,576	6.0%	828	1.9%	270
Ivins city	6,753	6,753	6,771	6,936	7,168	7,391	9.4%	638	3.1%	223
La Verkin city	4,060	4,060	4,064	4,126	4,209	4,161	2.5%	101	-1.1%	-48
Leeds town	820	814	814	822	829	830	1.2%	10	0.1%	1
New Harmony town	207	207	207	209	211	211	1.9%	4	0.0%	0
Rockville town	245	245	245	246	248	247	0.8%	2	-0.4%	-1
St. George city	72,897	72,761	72,873	73,982	75,335	76,817	5.4%	3,920	2.0%	1,482
Santa Clara city	6,003	6,145	6,150	6,294	6,421	6,526	8.7%	523	1.6%	105
Springdale town	529	529	531	542	547	548	3.6%	19	0.2%	1
Toquerville city	1,370	1,370	1,370	1,383	1,402	1,411	3.0%	41	0.6%	9
Virgin town	596	596	596	600	605	606	1.7%	10	0.2%	1
Washington city	18,761	18,761	18,857	19,968	20,830	21,890	16.7%	3,129	5.1%	1,060
Balance of Washington County	6,988	6,978	6,985	7,069	7,150	7,192	2.9%	204	0.6%	42
Wayne County	2,778	2,778	2,767	2,764	2,736	2,747	-1.1%	-31	0.4%	11
Bicknell town	327	328	327	326	322	322	-1.5%	-5	0.0%	0
Hanksville town	219	219	218	217	215	215	-1.8%	-4	0.0%	0
Loa town	572	572	569	570	566	569	-0.5%	-3	0.5%	3
Lyman town	258	258	257	256	253	254	-1.6%	-4	0.4%	1
Torrey town	182	182	181	181	178	179	-1.6%	-3	0.6%	1
Balance of Wayne County	1,220	1,219	1,215	1,214	1,202	1,208	-1.0%	-12	0.5%	6
Weber County	231,236	231,236	232,130	234,035	236,551	238,519	3.1%	7,283	0.8%	1,968
Farr West city	5,928	5,928	5,950	6,007	6,082	6,140	3.6%	212	1.0%	58
Harrisville city	5,567	5,585	5,626	5,732	5,819	5,915	6.3%	348	1.6%	96
Hooper city	7,218	7,218	7,317	7,538	7,718	7,957	10.2%	739	3.1%	239
Huntsville town	608	608	610	610	611	619	1.8%	11	1.3%	8

Figure 4.12
Total Population by City

	April 1, 2010		Population Estimate (July 1)				Change from 2010 Census		Change from 2012 to 2013	
	Census	Estimates Base	2010	2011	2012	2013	Percent	Number	Percent	Number
Marriott-Slaterville city	1,701	1,701	1,705	1,716	1,727	1,737	2.1%	36	0.6%	10
North Ogden city	17,357	17,339	17,405	17,556	17,766	18,019	3.8%	662	1.4%	253
Ogden city	82,825	82,827	83,031	83,334	83,903	84,249	1.7%	1,424	0.4%	346
Plain City city	5,476	5,476	5,510	5,688	5,891	6,049	10.5%	573	2.7%	158
Pleasant View city	7,979	7,985	8,034	8,145	8,308	8,571	7.4%	592	3.2%	263
Riverdale city	8,426	8,428	8,453	8,479	8,536	8,560	1.6%	134	0.3%	24
Roy city	36,884	36,884	36,985	37,246	37,557	37,733	2.3%	849	0.5%	176
South Ogden city	16,532	16,532	16,575	16,634	16,738	16,789	1.6%	257	0.3%	51
Uintah town	1,322	1,322	1,325	1,325	1,328	1,327	0.4%	5	-0.1%	-1
Washington Terrace city	9,067	9,065	9,083	9,104	9,146	9,164	1.1%	97	0.2%	18
West Haven city	10,272	10,275	10,410	10,711	11,056	11,248	9.5%	976	1.7%	192
Balance of Weber County	14,074	14,063	14,111	14,210	14,365	14,442	2.6%	368	0.5%	77

Source: U.S. Census Bureau

Employment, Wages, and Labor Force

Utah's labor market for 2014 can best be described as expanding in a moderately strong fashion. New jobs developed at a far greater pace than the national average and unemployment continued to trend downward. The governor's goal of creating 100,000 jobs in 1,000 days was attained ahead of schedule thanks to employment expansion across all industries. Utah continually ranked in the top five states for low unemployment and high job growth. New claims for unemployment insurance trended below 2013 levels, as did the amount of time for those drawing on a claim. Overall, 2014 was a constructive year for Utah labor markets. Yet challenges persist that could dampen growth in 2015 if not corrected by market forces. These challenges include weak wage growth and higher than normal levels of underemployment.

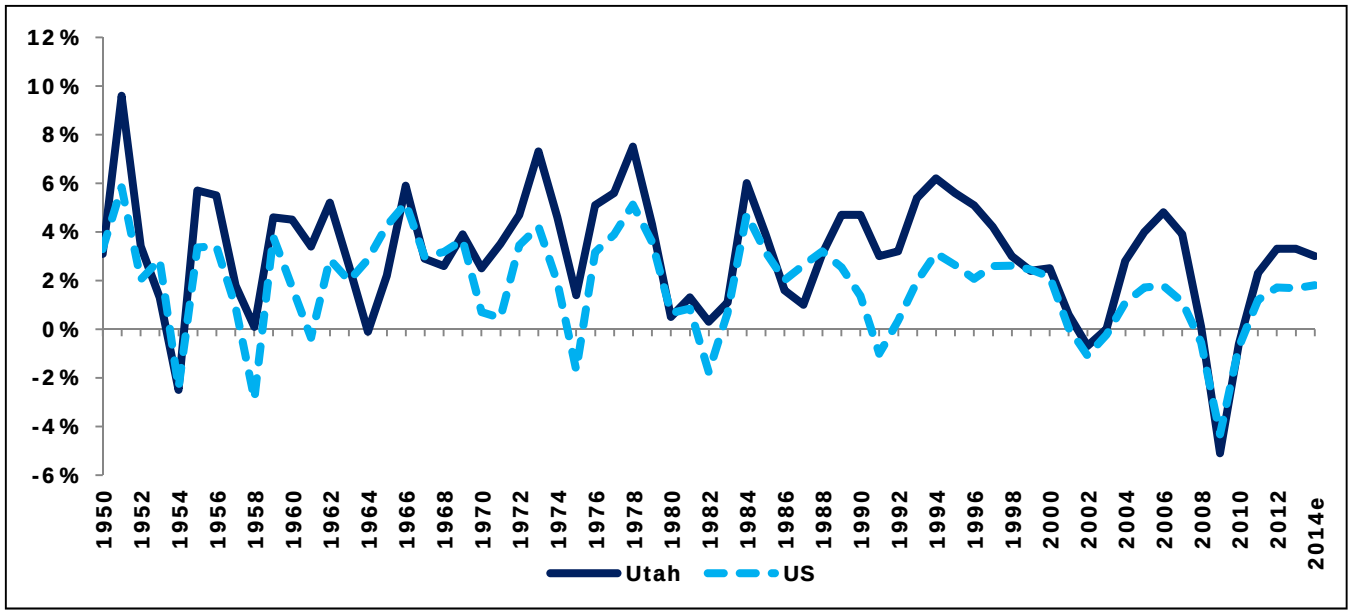
2014 Summary

The overall unemployment rate for 2014 was 3.6 percent, a full 1.2 percentage points lower than the prior year and 4.5 below the recession high of 8.1. The size of Utah's labor force grew by approximately 38,000 workers, but this barely moved the labor force participation rate for working-age adults, which currently stands at an annual average of 69.1 percent. In fact, current estimates show several months in latter-half 2014 exhibiting month-over declines in the rate. Future data benchmarking may show positive revisions in those month-over changes, but the state's working-age adults are still not participating in the labor force at the rate they were prior to the recession when over 72 percent of adults were engaged. The Utah economy expanded by approximately 38,600 jobs over the year with each of the state's industry sectors contributing to growth. Notable employment expansions for the year include the construction industry growing by roughly 7.0 percent above 2013, the transportation industry with growth of approximately 4.0 percent, and professional and business services posting growth of around 4.5 percent.

Significant Issues

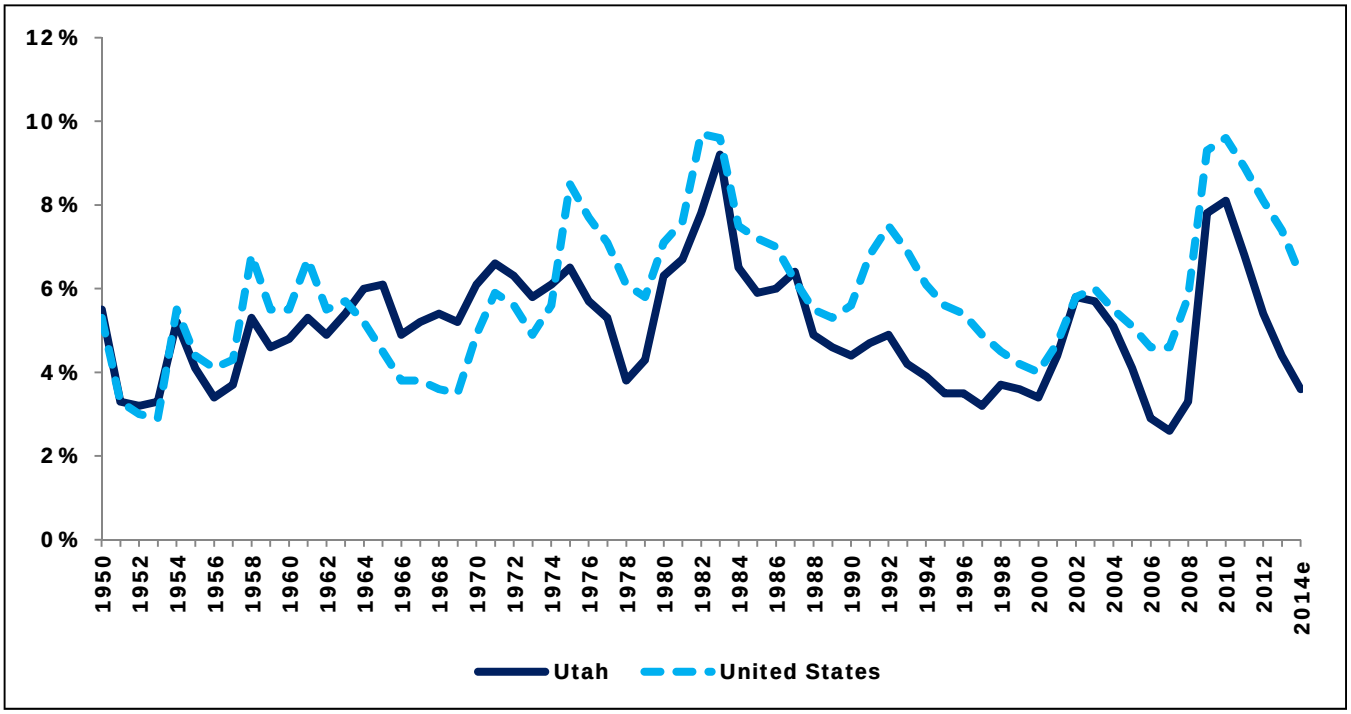
A lingering shadow over the state's labor market picture is slow wage growth, which was 1.0 percent for 2013 and roughly 2.5 percent for 2014. Economists generally expect soft wage growth during the initial economic recovery, but eventually as the economy transitions from recovery to expansion, which Utah did in late 2013, labor becomes scarcer and wage growth is expected to accelerate. On the surface, Utah's 2014 employment statistics suggest a tight labor market, with unemployment rates consistently below 4 percent. Yet market forces have failed to build momentum in wage growth. The probable explanation is the low labor force participation rate, which implies there is more potential labor supply available to employers than the low unemployment rate indicates. While it is an advantageous condition for the state's employers who have the ability to find the workers they need without having to bid up wages, the flipside is the lack of significant growth in disposable income that would allow those workers to increase their consumption. Market forces should eventually impel wage growth, but delays in that momentum raise concerns that lack of demand from those workers who aren't seeing their wages accelerate is a dampening force on the Utah economy.

Figure 5.1
Annual Average Job Growth Rate for Utah and the United States



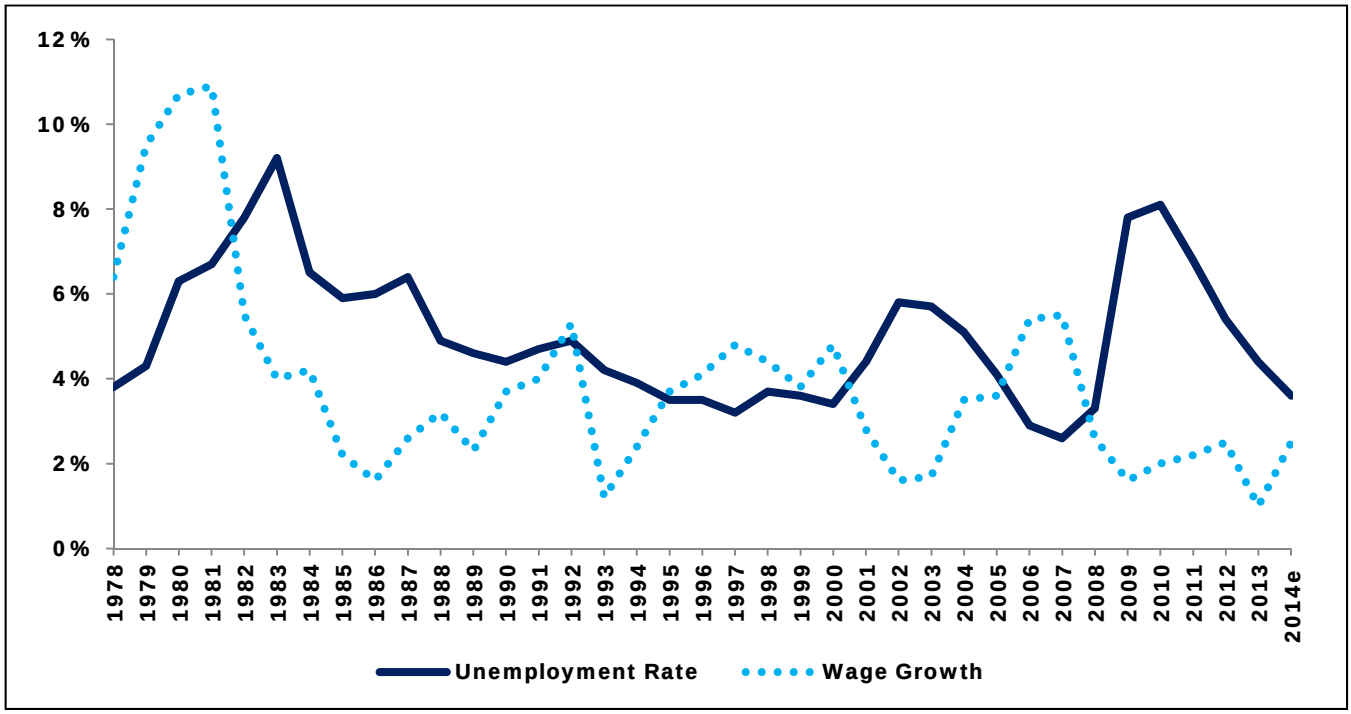
Source: Department of Workforce Services

Figure 5.2
Annual Unemployment Rate for Utah and the United States



Source: Department of Workforce Services

Figure 5.3
Annual Average Unemployment Rate and Wage Growth



Source: Department of Workforce Services

Figure 5.4
Utah Nonfarm Employment by Industry and Unemployment Rate

Year	Total Payroll Employment Number	Percent Change	Absolute Change	Unemployment Rate	Year	Total Payroll Employment Number	Percent Change	Absolute Change	Unemployment Rate
1950	189,153	3.1	5,653	5.5	1983	566,991	1.1	6,010	9.2
1951	207,386	9.6	18,233	3.3	1984	601,068	6.0	34,077	6.5
1952	214,409	3.4	7,023	3.2	1985	624,387	3.9	23,319	5.9
1953	217,194	1.3	2,785	3.3	1986	634,138	1.6	9,751	6.0
1954	211,864	-2.5	-5,330	5.2	1987	640,298	1.0	6,160	6.4
1955	224,007	5.7	12,143	4.1	1988	660,075	3.1	19,777	4.9
1956	236,225	5.5	12,218	3.4	1989	691,244	4.7	31,169	4.6
1957	240,577	1.8	4,352	3.7	1990	723,629	4.7	32,385	4.4
1958	240,816	0.1	239	5.3	1991	745,202	3.0	21,573	4.7
1959	251,940	4.6	11,124	4.6	1992	768,602	3.2	23,488	4.9
1960	263,307	4.5	11,367	4.8	1993	809,731	5.4	41,129	4.2
1961	272,355	3.4	9,048	5.3	1994	859,626	6.2	49,895	3.9
1962	286,382	5.2	14,027	4.9	1995	907,886	5.6	48,260	3.5
1963	293,758	2.6	7,376	5.4	1996	954,183	5.1	46,297	3.5
1964	293,576	-0.1	-182	6.0	1997	993,999	4.2	39,816	3.2
1965	300,164	2.2	6,588	6.1	1998	1,023,480	3.0	29,461	3.7
1966	317,771	5.9	17,607	4.9	1999	1,048,498	2.4	25,018	3.6
1967	326,953	2.9	9,182	5.2	2000	1,074,879	2.5	26,381	3.4
1968	335,527	2.6	8,574	5.4	2001	1,081,685	0.6	6,806	4.4
1969	348,612	3.9	13,085	5.2	2002	1,073,746	-0.7	-7,939	5.8
1970	357,435	2.5	8,823	6.1	2003	1,074,131	0.0	385	5.7
1971	369,836	3.5	12,401	6.6	2004	1,104,328	2.8	30,197	5.1
1972	387,271	4.7	17,435	6.3	2005	1,148,320	4.0	43,992	4.1
1973	415,641	7.3	28,370	5.8	2006	1,203,914	4.8	55,594	2.9
1974	434,793	4.6	19,152	6.1	2007	1,251,282	3.9	47,368	2.6
1975	441,082	1.4	6,289	6.5	2008	1,252,470	0.1	1,188	3.3
1976	463,658	5.1	22,576	5.7	2009	1,188,736	-5.1	-63,734	7.8
1977	489,580	5.6	25,922	5.3	2010	1,181,519	-0.6	-7,217	8.1
1978	526,400	7.5	36,820	3.8	2011	1,208,650	2.3	27,131	6.8
1979	549,242	4.3	22,842	4.3	2012	1,248,935	3.3	40,285	5.4
1980	551,889	0.5	2,647	6.3	2013	1,290,420	3.3	41,485	4.4
1981	559,184	1.3	7,295	6.7	2014e	1,329,000	3.0	38,580	3.6
1982	560,981	0.3	1,797	7.8	2015f	1,362,400	2.5	33,400	3.6

e = estimate
f = forecast

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

2015 Outlook

Current employment projections estimate approximately 33,400 jobs will be added to the Utah economy, a growth rate of 2.5 percent. This represents a slowing from the prior two years, and takes Utah employment growth below average. Current information from economic development experts indicates the potential for stronger than normal growth in jobs related to the information and professional and business services industries. By contrast, slight slowing in Utah's population projections suggest potential for a very slight slowdown in hiring for industries that tend to be population driven, such as health care, social assistance, and education.

Conclusion

Utah's business-friendly climate, educated and expanding workforce, and world-renown tourist attractions are the backbone to Utah's history of outperforming the national economy. However, should sluggish wage growth continue into the new year, the state could likely hit a tipping point where above-average growth will not be sustained without stronger consumer demand from Utah's 1.3 million wage and salary workers. Should wage growth accelerate in the early months of 2015, Utah may experience another year of average or above employment growth.

Figure 5.5
Utah Labor Force, Nonagricultural Jobs, and Wages

						Annual Percent Change			
	2011	2012	2013	2014e	2015f	2012	2013	2014e	2015f
Civilian Labor Force	1,353,257	1,376,628	1,418,522	1,456,683	1,489,342	1.7	3.0	2.7	2.2
Employed Persons	1,261,698	1,302,641	1,355,720	1,403,981	1,435,691	3.2	4.1	3.6	2.3
Unemployed Persons	91,559	73,987	62,802	52,702	53,651	-19.2	-15.1	-16.1	1.8
Unemployment Rate	6.8	5.4	4.4	3.6	3.6				
U.S. Rate	8.9	8.1	7.4	6.3	5.8				
Total Nonfarm Jobs	1,208,582	1,248,893	1,290,420	1,329,000	1,362,400	3.3	3.3	3.0	2.5
Mining	11,659	12,553	12,108	12,800	13,100	7.7	-3.5	5.7	2.3
Construction	65,168	69,225	73,463	78,100	81,200	6.2	6.1	6.3	4.0
Manufacturing	113,684	116,667	118,747	123,400	126,800	2.6	1.8	3.9	2.8
Trade, Trans., Utilities	233,248	241,870	246,900	256,100	261,400	3.7	2.1	3.7	2.1
Information	29,495	31,295	32,427	34,900	36,500	6.1	3.6	7.6	4.6
Financial Activity	68,390	69,540	72,942	74,800	76,000	1.7	4.9	2.5	1.6
Professional & Business Services	159,420	167,219	177,462	180,300	188,400	4.9	6.1	1.6	4.5
Education & Health Services	159,211	163,594	170,541	175,000	179,400	2.8	4.2	2.6	2.5
Leisure & Hospitality	113,511	118,618	123,539	128,400	131,600	4.5	4.1	3.9	2.5
Other Services	34,022	35,014	36,372	37,400	38,300	2.9	3.9	2.8	2.4
Government	220,775	223,298	225,920	227,800	229,700	1.1	1.2	0.8	0.8
Goods-producing	190,511	198,445	204,317	214,300	221,100	4.2	3.0	4.9	3.2
Service-producing	1,018,071	1,050,448	1,086,103	1,114,700	1,141,300	3.2	3.4	2.6	2.4
Percent Svc.-producing	84.2%	84.1%	84.2%	83.9%	83.8%				
U.S. Nonfarm Job Growth %	1.2	1.7	1.7	1.8	1.6				
Total Nonfarm Wages (millions)	$47,968	$50,762	$52,989	$56,521	$59,068	5.8	4.4	6.7	4.5
Average Annual Wage	$39,689	$40,646	$41,063	$42,529	$43,356	2.4	1.0	3.6	1.9
Average Monthly Wage	$3,307	$3,387	$3,422	$3,544	$3,613	2.4	1.0	3.6	1.9
Establishments (first quarter)	80,567	81,551	84,914	87,944	89,200				

Note: Numbers in this table may differ from other tables as not all industrial sectors are listed here.

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

Personal Income

Utah's total personal income in 2014 was an estimated $110.7 billion, a 4.1 percent increase from $106.3 billion in 2013. Utah's estimated 2014 per capita income was $37,532, up 2.4 percent from the 2013 level of $36,640. These 2014 growth rates are markedly slower than the average annual state growth rates of 6.7 percent for total personal income and 5.2 percent for per capita income during the 2011 and 2012 period. However, Utah's slowdown has been slightly less pronounced than that of the U.S. economy as a whole during the 2011-2013 period. With the Federal Reserve beginning to tighten its monetary policy and with no signs of U.S. inflation, Utah will likely continue to grow at its current moderate pace, although early 2014 data is showing signs of Utah strengthening. With a young, well-educated population, diversified high-tech industry, growing tourism industry, and business-friendly conditions, Utah will likely continue to grow in step with the U.S. average.

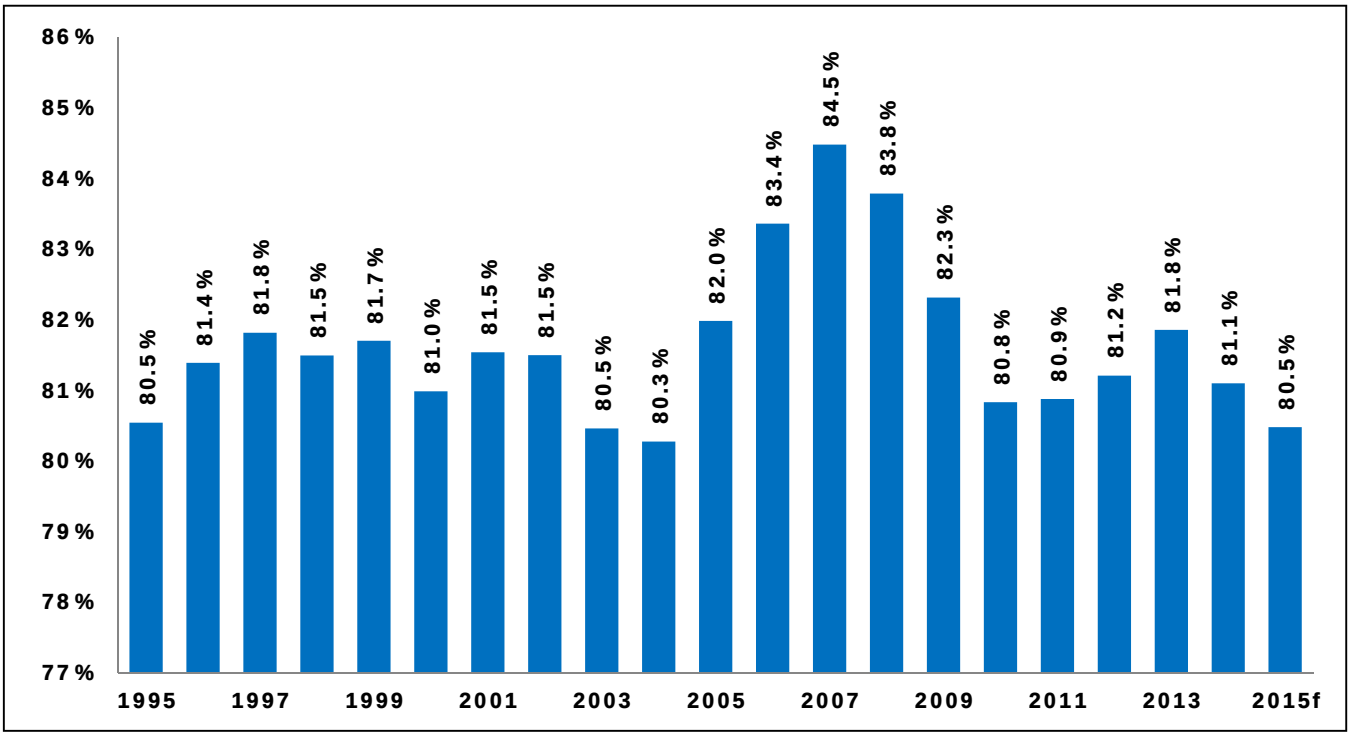
Total Personal Income

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 by residence; 2) income from dividends, interest and rent (DIR); and, 3) income from transfer receipts, such as social security, welfare and pensions. The largest component of TPI is typically earnings by place of residence, which consists of the total earnings from farm and nonfarm industries including contributions for social insurance. In 2014, Utah's TPI was an estimated $110.7 billion, a 4.1 percent increase from $106.3 billion in 2013. Of total personal income in 2013, 68 percent can be attributed to earnings by place of residence. Of this amount, 70 percent came from wages, 18 percent came from supplements to wages and salaries, and 12 percent came from proprietors' income.

In 2013, Utah's income from Dividends, Interest, and Rent (DIR) increased to $19.2 billion and income from transfer receipts was $14.5 billion. Utah transfer receipts comprise a much smaller portion of TPI than the national average (13.6 percent vs. 17.1 percent). Thus, Utahns rely more on wage earnings for income than their counterparts nationally. And all three subcategories of Utah total personal income have grown faster than the corresponding national measures.

In 2013, most nonfarm earnings in Utah were in the private sector, 82.2 percent of the earnings by place of residence, compared to 82.7 percent nationally. The Utah public sector accounted for 17.8 percent of nonfarm earnings, also roughly equal to the national proportion (17.3 percent). Within the

Figure 6.1
Utah Per Capita Income as a Percent of United States Per Capita Income



Note: Axis does not start a zero
Source: Bureau of Economic Analysis

Utah private sector, the manufacturing was the largest source of earnings, followed by health care and social services, and professional, scientific, and technical services, respectively. At the national level, health care accounted for the largest percentage of private sector earnings followed by professional, scientific, and technical services, and manufacturing.

In 2013, all of Utah's broad industry classifications experienced growth in earnings. Real estate, rental and leasing, professional, scientific, and technical services, administrative and waste management services, and arts, entertainment, and recreation all had annual earnings growth rates over 8 percent. The public sector experienced 1.5 percent growth in earnings.

Per Capita Income

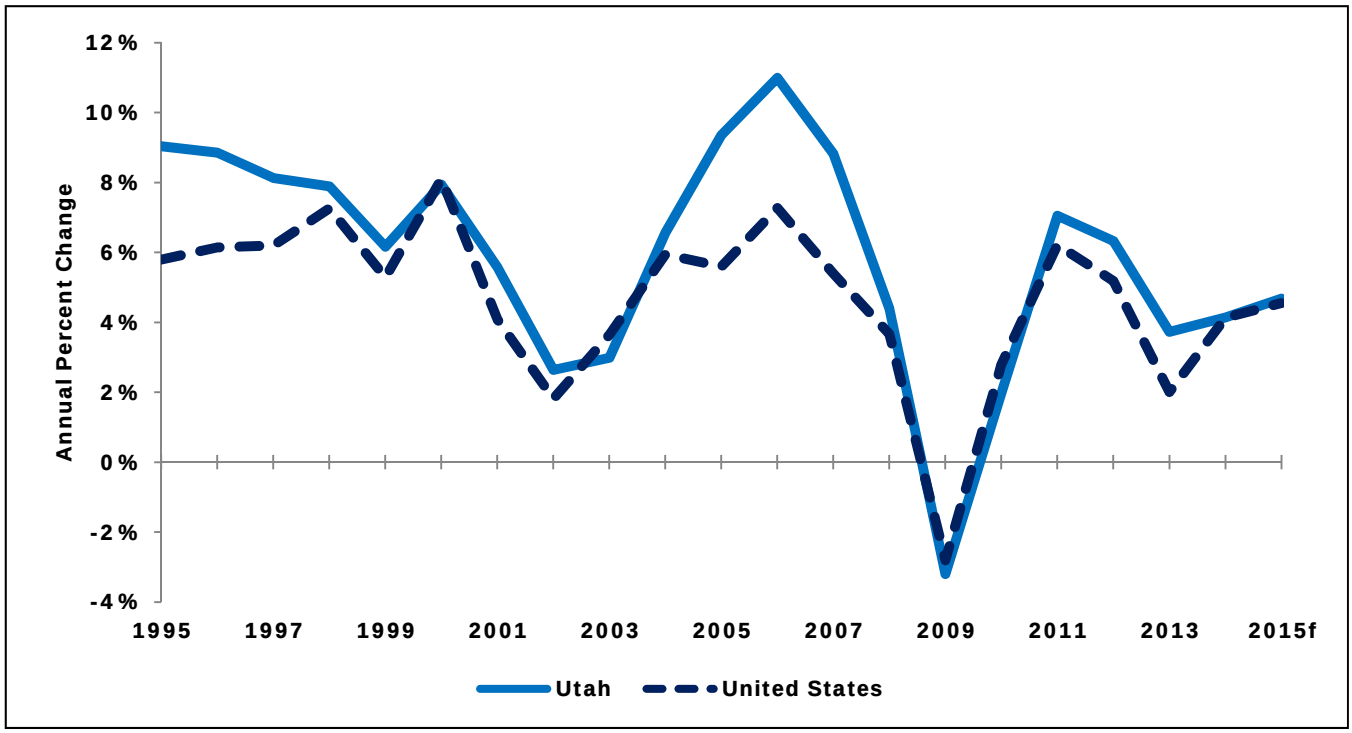
Per capita income (PCI) is a region's total personal income divided by its total population. Personal income and per capita earnings data are reported quarterly by the U.S. Bureau of Economic Analysis. Utah's estimated 2014 PCI was $37,532, up 2.4 percent from the 2013 level of $36,640. Utah's 2013 growth rate in per capita income of 2.1 percent ranked 44th among the 50 states and Washington, D.C. Since the early 1980s, Utah's PCI has averaged about 20 percent less than the national PCI. Utah's estimated 2014 PCI of $37,532 is 81.1 percent of the national PCI ($46,282). The state's PCI remains weak against the national for two reasons: 1) Utah's average wages are generally below the national average; and, 2) Utah's population is the nation's youngest. Utah's low PCI reflects the relatively larger proportion of non-wage earners in the denominator.

Personal and Per Capita Income by County

The U.S. Bureau of Economic Analysis has not yet released 2013 county level PI numbers so details for 2012 are discussed. As noted above, growth in 2011 and 2012 was more robust than 2013. Revised 2012 personal income numbers show that only two Utah counties, Emery and Wayne, experienced declines of -1.8 percent and -2.2 percent respectively. All 27 other Utah counties experienced personal income growth. Oil and gas dependent Duchesne and Uintah Counties had the largest growth of 11.5 percent and 7.2 percent, respectively. Summit, Morgan, Salt Lake, Wasatch, Davis, and Utah Counties all had growth between 5 percent and 7 percent.

In 2012, Summit County had the highest estimated per capita income of $77,468, the highest in the state, which was more than double the state average ($35,430) and was the only county which exceeded the national average ($44,200). Summit was followed by Duchesne ($41,832) and Salt Lake ($41,038) Counties. San Juan County ($22,644) had the lowest per capita income, only 64 percent of the Utah average. Per capita income in 2012 in Daggett County ($35,424) had the largest annual percentage increase of 11.2 percent among all Utah counties.

Figure 6.2
Utah vs. U.S. Total Personal Income Growth



Source: Bureau of Economic Analysis

Figure 6.3
Personal and Per Capita Income

Year	Total Personal Income (Millions of Dollars) Utah	United States	Utah as % of U.S.	Annual Growth Rates Utah	United States	Per Capita Personal Income (Dollars) Utah	United States	Utah as % of U.S.
1970	$3,767	$8,550,780	0.04%	11.1%	7.8%	$3,535	$4,196	84.2%
1971	4,219	9,239,640	0.05%	12.0%	8.1%	3,833	4,468	85.8%
1972	4,713	10,155,260	0.05%	11.7%	9.9%	4,154	4,853	85.6%
1973	5,240	11,312,130	0.05%	11.2%	11.4%	4,483	5,352	83.8%
1974	5,863	12,424,330	0.05%	11.9%	9.8%	4,891	5,824	84.0%
1975	6,542	13,599,980	0.05%	11.6%	9.5%	5,302	6,312	84.0%
1976	7,391	14,911,430	0.05%	13.0%	9.6%	5,809	6,854	84.8%
1977	8,356	16,466,080	0.05%	13.1%	10.4%	6,348	7,493	84.7%
1978	9,599	18,516,150	0.05%	14.9%	12.5%	7,036	8,337	84.4%
1979	10,848	20,685,590	0.05%	13.0%	11.7%	7,661	9,211	83.2%
1980	12,169	23,063,480	0.05%	12.2%	11.5%	8,263	10,150	81.4%
1981	13,721	25,837,250	0.05%	12.8%	12.0%	9,054	11,260	80.4%
1982	14,912	27,670,240	0.05%	8.7%	7.1%	9,569	11,944	80.1%
1983	15,952	29,573,470	0.05%	7.0%	6.9%	10,002	12,649	79.1%
1984	17,595	32,680,310	0.05%	10.3%	10.5%	10,846	13,858	78.3%
1985	18,877	35,014,530	0.05%	7.3%	7.1%	11,490	14,717	78.1%
1986	19,814	37,116,540	0.05%	5.0%	6.0%	11,916	15,457	77.1%
1987	20,738	39,403,300	0.05%	4.7%	6.2%	12,358	16,263	76.0%
1988	22,041	42,597,520	0.05%	6.3%	8.1%	13,047	17,422	74.9%
1989	23,687	46,023,300	0.05%	7.5%	8.0%	13,886	18,647	74.5%
1990	25,722	48,884,930	0.05%	8.6%	6.2%	14,858	19,584	75.9%
1991	27,610	50,534,900	0.05%	7.3%	3.4%	15,513	19,976	77.7%
1992	29,911	53,998,380	0.06%	8.3%	6.9%	16,284	21,051	77.4%
1993	32,298	56,375,580	0.06%	8.0%	4.4%	17,013	21,690	78.4%
1994	35,034	59,277,480	0.06%	8.5%	5.1%	17,871	22,528	79.3%
1995	38,202	62,712,530	0.06%	9.0%	5.8%	18,967	23,551	80.5%
1996	41,586	66,565,700	0.06%	8.9%	6.1%	20,109	24,709	81.4%
1997	44,968	70,694,640	0.06%	8.1%	6.2%	21,213	25,929	81.8%
1998	48,517	75,827,100	0.06%	7.9%	7.3%	22,400	27,488	81.5%
1999	51,505	79,835,930	0.06%	6.2%	5.3%	23,374	28,611	81.7%
2000	55,596	86,305,500	0.06%	7.9%	8.1%	24,770	30,587	81.0%
2001	58,698	89,833,980	0.07%	5.6%	4.1%	25,703	31,524	81.5%
2002	60,248	91,464,280	0.07%	2.6%	1.8%	25,915	31,800	81.5%
2003	62,047	94,797,630	0.07%	3.0%	3.6%	26,290	32,677	80.5%
2004	66,120	100,432,310	0.07%	6.6%	5.9%	27,532	34,300	80.3%
2005	72,310	106,055,950	0.07%	9.4%	5.6%	29,421	35,888	82.0%
2006	80,260	113,764,050	0.07%	11.0%	7.3%	31,780	38,127	83.4%
2007	87,348	119,901,040	0.07%	8.8%	5.4%	33,624	39,804	84.5%
2008	91,191	124,292,340	0.07%	4.4%	3.7%	34,243	40,873	83.8%
2009	88,273	120,802,230	0.07%	-3.2%	-2.8%	32,413	39,379	82.3%
2010	90,021	124,176,590	0.07%	2.0%	2.8%	32,447	40,144	80.8%
2011	96,365	131,899,350	0.07%	7.0%	6.2%	34,235	42,332	80.9%
2012	102,464	138,731,610	0.07%	6.3%	5.2%	35,891	44,200	81.2%
2013	106,289	141,514,270	0.08%	3.7%	2.0%	36,640	44,765	81.8%
2014e	110,691	147,357,256	0.08%	4.1%	4.1%	37,532	46,282	81.1%
2015f	115,868	154,063,149	0.08%	4.7%	4.6%	38,641	48,016	80.5%

e = estimate
f = forecast

Sources:
1. U.S. Department of Commerce, Bureau of Economic Analysis
2. Utah Revenue Assumptions Working Group
3. Utah State Tax Commission

Note: The TPI forecasts from the Utah Revenue Assumptions Working Group were calculated before BEA made revisions. Estimated TPI and PCI for 2014 and 2015 are based on forecasted percent changes, but not on the levels.

Figure 6.4
Total Per Capita Personal Income by County

						Percent Change			
	2008	2009	2010	2011	2012	2008-09	2009-10	2010-11	2011-12
Utah	$34,265	$32,412	$32,472	$34,173	$35,430	-5.4%	0.2%	5.2%	3.7%
Beaver	26,771	27,821	27,366	29,825	30,130	3.9%	-1.6%	9.0%	1.0%
Box Elder	30,224	29,074	28,768	30,325	31,481	-3.8%	-1.1%	5.4%	3.8%
Cache	28,247	26,970	27,276	28,829	29,243	-4.5%	1.1%	5.7%	1.4%
Carbon	32,525	31,382	31,675	33,084	33,375	-3.5%	0.9%	4.4%	0.9%
Daggett	28,576	30,071	30,176	31,842	35,424	5.2%	0.3%	5.5%	11.2%
Davis	34,762	33,837	33,762	35,727	37,124	-2.7%	-0.2%	5.8%	3.9%
Duchesne	39,764	34,744	34,471	38,284	41,832	-12.6%	-0.8%	11.1%	9.3%
Emery	25,628	25,959	27,904	32,751	27,065	1.3%	7.5%	17.4%	-17.4%
Garfield	26,961	26,865	27,593	29,044	29,621	-0.4%	2.7%	5.3%	2.0%
Grand	34,356	32,899	32,503	36,211	37,701	-4.2%	-1.2%	11.4%	4.1%
Iron	24,150	23,379	23,249	24,682	25,273	-3.2%	-0.6%	6.2%	2.4%
Juab	24,610	23,756	23,903	25,187	25,732	-3.5%	0.6%	5.4%	2.2%
Kane	32,746	31,689	31,533	33,168	34,534	-3.2%	-0.5%	5.2%	4.1%
Millard	28,909	26,638	28,048	30,439	30,857	-7.9%	5.3%	8.5%	1.4%
Morgan	32,264	31,266	32,241	36,124	37,474	-3.1%	3.1%	12.0%	3.7%
Piute	25,442	24,600	24,647	26,355	26,312	-3.3%	0.2%	6.9%	-0.2%
Rich	33,717	31,910	31,688	32,801	34,854	-5.4%	-0.7%	3.5%	6.3%
Salt Lake	39,870	37,512	37,744	39,475	41,038	-5.9%	0.6%	4.6%	4.0%
San Juan	20,060	21,241	21,973	22,644	22,818	5.9%	3.4%	3.1%	0.8%
Sanpete	22,198	21,018	21,618	22,464	23,346	-5.3%	2.9%	3.9%	3.9%
Sevier	25,832	25,509	25,971	27,063	28,044	-1.3%	1.8%	4.2%	3.6%
Summit	71,634	65,767	68,598	74,392	77,468	-8.2%	4.3%	8.4%	4.1%
Tooele	27,173	26,907	27,084	28,429	29,505	-1.0%	0.7%	5.0%	3.8%
Uintah	35,640	28,661	29,777	32,209	33,170	-19.6%	3.9%	8.2%	3.0%
Utah	27,351	25,404	25,141	26,495	27,624	-7.1%	-1.0%	5.4%	4.3%
Wasatch	30,533	28,277	27,247	29,473	29,946	-7.4%	-3.6%	8.2%	1.6%
Washington	28,141	27,184	26,933	27,920	28,597	-3.4%	-0.9%	3.7%	2.4%
Wayne	26,354	25,305	26,623	28,552	28,159	-4.0%	5.2%	7.2%	-1.4%
Weber	33,883	32,784	32,513	34,107	35,355	-3.2%	-0.8%	4.9%	3.7%

Source: Bureau of Economic Analysis

2015 Outlook

The annual growth rate for Utah personal income in the first two quarters of 2014 was 5.1 percent and 5.3 percent annual, respectively. This suggests Utah will have a better year in 2014 and 2015 than in 2013. Utah personal income is expected to increase by 4.1 percent in 2014 and by 4.7 percent in 2015, on par with the projected growth rates for the U.S. economy. Per capita personal income is forecast to increase 2.4 percent in 2014 and 3.0 percent in 2015. This is slightly less than the projected growth in U.S. per capita income of about 3.5 percent over the same period. The difference is primarily because Utah's population is projected to grow faster than the national population. Utah's per capita personal income relative to U.S. per capita personal income will decrease slightly to 81.1 percent in 2014 and 80.5 percent in 2015. Given the slow growth that the U.S. economy continues to experience and the reduced monetary stimulus from the Federal Reserve in 2014, the Utah economy will likely continue to perform in step with the U.S. average.

Gross Domestic Product by State

Gross domestic product (GDP) by state details the value of final goods and services produced in a state. It is the state-level counterpart to the national GDP. 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) of the U.S. Department of Commerce releases GDP data annually in June. In 2014, BEA revised state-level GDP measures for 1997 through 2012.

Nominal GDP

Utah's nominal GDP (measured in current dollars) was estimated to be $141.2 billion in 2013, up from $134.5 billion in 2012. This represents a growth rate of 5.0 percent. The Utah GDP growth rates of 5.0 percent, 6.9 percent, and 5.5 percent in 2013, 2012, and 2011, respectively, represent a marked improvement in the Utah economy compared to the average annual GDP growth rate of 0.7 percent between 2008 and 2010. However, Utah's growth rate over the last three years is still significantly below the 7.6 percent annual growth rate in state GDP that prevailed between 1998 and 2007.

Real GDP

Utah's real GDP (measured in 2009 chained dollars) was $131.0 billion in 2013, up from $126.2 billion in 2012. This represents a growth rate of 3.8 percent, the seventh highest in the nation. Utah's growth in 2013 was more than double the U.S. average of 1.8 percent. Of Utah's production in 2013, 87 percent came from private industry led by finance, insurance, real estate, and manufacturing.

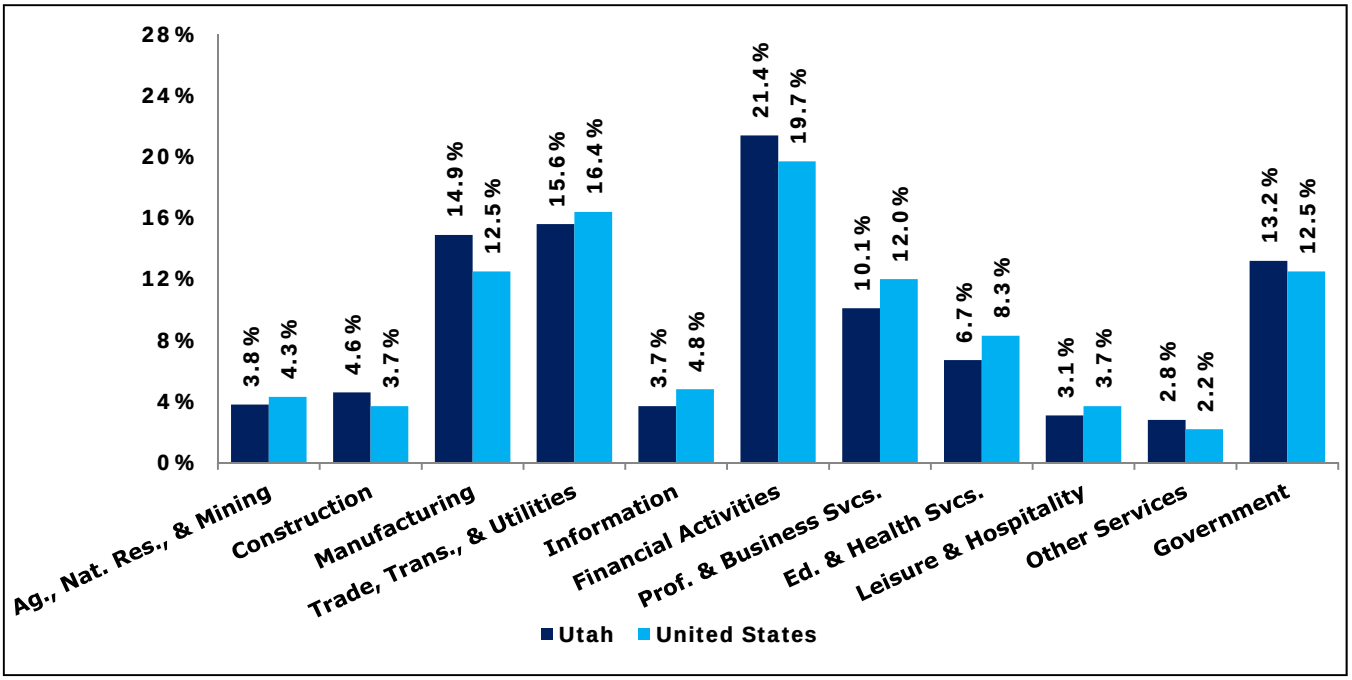
Industry Growth

The agriculture industry showed the strongest real GDP industry growth for the 2012 to 2013 period, growing from $466 million to $556 million, a 19 percent increase. Mining and manufacturing had industry GDP growth rates of 7.1 percent and 6.9 percent, respectively. The lowest growth industry in 2013 was government, with a growth rate of 0.7 percent.

Conclusion

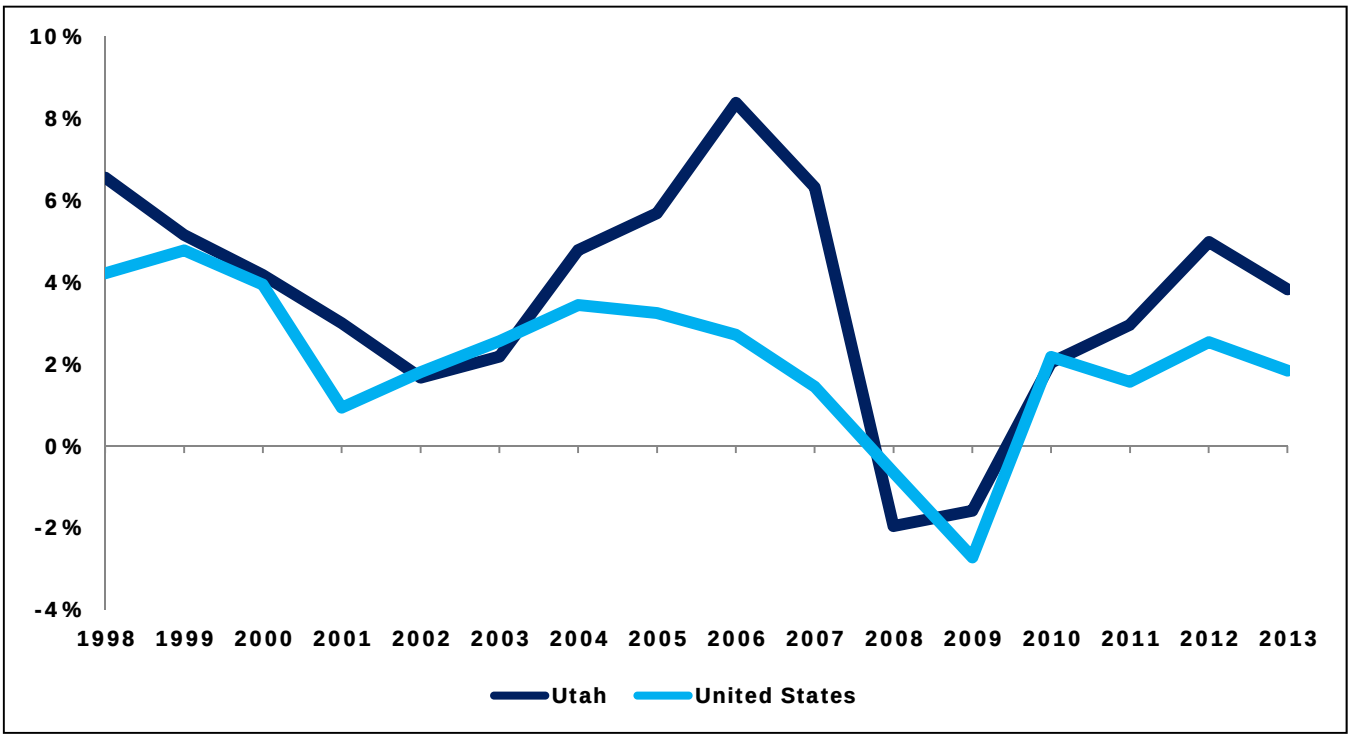
Utah's current real GDP growth rate of 3.8 percent is in line with the average growth rate of 3.9 percent in the state over the last three years. This is a marked increase from the negative Utah average real GDP growth rate of -0.5 percent during 2008-2010. Although the Federal Reserve's planned tightening of monetary policy in late 2014 and early 2015 will be a drag on the economy, the State of Utah is ideally positioned to maintain robust growth. Over the last 15 years, the state economy grew at a rate that was 1.5 percentage points higher on average than that of the U.S. economy. A likely set of contributors to Utah's economic success is its diversity of industries, strong tech sector, and educated workforce.

Figure 7.1
Percent of GDP by Industry: 2013



Source: Bureau of Economic Analysis

Figure 7.2
Utah vs. United States Real GDP Growth



Source: Bureau of Economic Analysis

Figure 7.3
Nominal Gross Domestic Product (GDP) by State

	Millions of Current Dollars						2013 Percent of Total	Percent Change 2012-2013
	2008	2009	2010	2011	2012	2013		
United States	$14,636,247	$14,328,006	$14,862,637	$15,431,583	$16,141,152	$16,701,415	100.0%	3.5%
Alabama	173,251	169,052	175,734	181,848	189,542	193,566	1.2%	2.1%
Alaska	54,770	49,954	53,251	58,581	59,643	59,355	0.4%	-0.5%
Arizona	259,058	243,331	247,752	258,187	271,503	279,024	1.7%	2.8%
Arkansas	107,854	105,841	111,355	115,582	118,993	124,218	0.7%	4.4%
California	1,978,113	1,906,376	1,953,411	2,030,468	2,125,717	2,202,678	13.2%	3.6%
Colorado	254,760	248,177	256,628	266,243	278,551	294,443	1.8%	5.7%
Connecticut	236,060	230,005	233,781	235,121	242,930	249,251	1.5%	2.6%
Delaware	54,156	56,090	57,628	58,612	60,650	62,703	0.4%	3.4%
District of Columbia	101,571	101,927	106,615	110,702	111,870	113,362	0.7%	1.3%
Florida	753,012	721,684	728,604	736,347	769,007	800,492	4.8%	4.1%
Georgia	408,682	404,045	410,902	421,564	438,324	454,532	2.7%	3.7%
Hawaii	66,423	65,084	67,285	69,755	72,512	75,235	0.5%	3.8%
Idaho	55,787	54,063	55,427	56,956	58,231	62,247	0.4%	6.9%
Illinois	642,245	636,975	652,681	676,911	704,138	720,692	4.3%	2.4%
Indiana	274,593	262,428	283,289	292,032	306,838	317,102	1.9%	3.3%
Iowa	135,907	136,511	141,814	148,997	156,606	165,767	1.0%	5.8%
Kansas	124,215	120,769	126,347	135,336	138,958	144,062	0.9%	3.7%
Kentucky	159,051	156,149	166,344	172,517	177,967	183,373	1.1%	3.0%
Louisiana	217,554	209,860	232,879	242,666	251,369	253,576	1.5%	0.9%
Maine	50,149	50,318	51,470	51,756	53,235	54,755	0.3%	2.9%
Maryland	299,239	304,414	316,164	326,237	336,481	342,382	2.1%	1.8%
Massachusetts	385,730	383,150	399,603	413,716	431,937	446,323	2.7%	3.3%
Michigan	387,299	366,302	387,730	400,924	416,769	432,573	2.6%	3.8%
Minnesota	265,086	259,412	272,244	285,669	298,272	312,081	1.9%	4.6%
Mississippi	94,790	92,162	94,649	96,224	101,549	105,163	0.6%	3.6%
Missouri	249,829	250,738	257,924	259,894	269,356	276,345	1.7%	2.6%
Montana	36,582	35,706	37,520	40,250	42,140	44,040	0.3%	4.5%
Nebraska	85,458	86,869	91,131	98,237	103,062	109,614	0.7%	6.4%
Nevada	130,043	120,100	120,579	123,365	128,896	132,024	0.8%	2.4%
New Hampshire	59,709	60,382	62,622	64,122	66,111	67,848	0.4%	2.6%
New Jersey	498,828	488,987	497,733	504,078	528,788	543,071	3.3%	2.7%
New Mexico	84,460	81,356	83,798	87,334	89,188	92,245	0.6%	3.4%
New York	1,126,960	1,151,659	1,198,004	1,231,470	1,280,737	1,310,712	7.8%	2.3%
North Carolina	407,008	409,453	420,876	429,793	452,358	471,365	2.8%	4.2%
North Dakota	32,125	32,137	35,482	40,508	49,509	56,329	0.3%	13.8%
Ohio	491,712	476,170	494,695	519,082	548,526	565,272	3.4%	3.1%
Oklahoma	160,607	146,987	154,062	165,424	171,432	182,086	1.1%	6.2%
Oregon	179,419	180,155	190,800	199,488	210,242	219,590	1.3%	4.4%
Pennsylvania	571,948	571,503	590,830	609,952	629,851	644,915	3.9%	2.4%
Rhode Island	46,954	47,592	49,265	49,921	51,566	53,184	0.3%	3.1%
South Carolina	161,779	160,046	163,836	171,546	177,985	183,561	1.1%	3.1%
South Dakota	37,386	36,979	38,940	42,453	43,758	46,732	0.3%	6.8%
Tennessee	249,621	247,465	253,987	264,940	280,485	287,633	1.7%	2.5%
Texas	1,243,331	1,167,233	1,248,511	1,357,298	1,463,021	1,532,623	9.2%	4.8%
Utah	116,955	114,433	119,249	125,754	134,483	141,240	0.8%	5.0%
Vermont	25,312	25,250	26,570	27,545	28,422	29,509	0.2%	3.8%
Virginia	398,120	406,066	421,325	430,103	445,090	452,585	2.7%	1.7%
Washington	351,857	350,125	360,680	370,359	390,918	408,049	2.4%	4.4%
West Virginia	61,928	62,752	66,111	69,463	69,711	73,970	0.4%	6.1%
Wisconsin	245,277	245,898	254,242	263,076	272,086	282,486	1.7%	3.8%
Wyoming	43,684	37,890	40,274	43,178	41,839	45,432	0.3%	8.6%

Notes:
1. In October of 2006, BEA renamed the gross state product (GSP) series to gross domestic product (GDP) by state.
2. GDP by state for 1997-2012 was revised June 2014.

Source: Bureau of Economic Analysis

Figure 7.4
Real Gross Domestic Product (GDP) by State

	Millions of Chained 2009 Dollars						2013 Percent of Total	Percent Change 2012-2013
	2008	2009	2010	2011	2012	2013		
United States	$14,728,947	$14,328,006	$14,639,748	$14,868,836	$15,245,906	$15,526,715	100.0%	1.8%
Alabama	175,037	169,052	172,998	175,159	179,312	180,727	1.2%	0.8%
Alaska	46,266	49,954	49,023	51,100	52,870	51,542	0.3%	-2.5%
Arizona	264,823	243,331	245,032	251,462	259,043	261,924	1.7%	1.1%
Arkansas	108,753	105,841	110,065	111,829	113,056	115,745	0.7%	2.4%
California	1,987,642	1,906,376	1,924,438	1,957,114	2,009,936	2,050,693	13.2%	2.0%
Colorado	252,723	248,177	252,035	255,866	263,593	273,721	1.8%	3.8%
Connecticut	241,691	230,005	231,643	229,513	231,809	233,996	1.5%	0.9%
Delaware	54,035	56,090	56,684	56,789	57,129	58,028	0.4%	1.6%
District of Columbia	103,244	101,927	104,407	106,484	105,989	105,465	0.7%	-0.5%
Florida	769,066	721,684	721,007	718,174	734,274	750,511	4.8%	2.2%
Georgia	417,376	404,045	406,992	410,811	416,927	424,606	2.7%	1.8%
Hawaii	67,419	65,084	66,432	67,660	68,825	70,110	0.5%	1.9%
Idaho	56,338	54,063	54,702	54,781	54,792	57,029	0.4%	4.1%
Illinois	654,944	636,975	645,829	656,145	665,613	671,407	4.3%	0.9%
Indiana	280,781	262,428	280,408	281,171	288,261	294,212	1.9%	2.1%
Iowa	138,130	136,511	140,473	142,760	146,336	150,512	1.0%	2.9%
Kansas	125,579	120,769	124,521	129,243	129,726	132,153	0.9%	1.9%
Kentucky	162,707	156,149	164,068	166,681	168,022	170,667	1.1%	1.6%
Louisiana	204,597	209,860	220,819	214,705	219,209	222,008	1.4%	1.3%
Maine	51,433	50,318	50,945	50,407	50,707	51,163	0.3%	0.9%
Maryland	305,480	304,414	313,016	318,242	322,188	322,234	2.1%	0.0%
Massachusetts	392,554	383,150	396,122	404,929	414,144	420,748	2.7%	1.6%
Michigan	399,656	366,302	385,779	394,201	400,232	408,218	2.6%	2.0%
Minnesota	269,762	259,412	268,941	275,663	281,284	289,125	1.9%	2.8%
Mississippi	95,357	92,162	93,027	92,267	95,474	96,979	0.6%	1.6%
Missouri	255,276	250,738	255,496	253,146	256,183	258,135	1.7%	0.8%
Montana	36,510	35,706	36,576	37,778	38,692	39,846	0.3%	3.0%
Nebraska	86,371	86,869	89,873	93,267	95,349	98,250	0.6%	3.0%
Nevada	132,383	120,100	119,242	120,217	122,698	123,903	0.8%	1.0%
New Hampshire	61,216	60,382	62,187	62,872	63,538	64,118	0.4%	0.9%
New Jersey	510,432	488,987	493,213	490,653	503,497	509,067	3.3%	1.1%
New Mexico	81,372	81,356	81,179	82,096	83,057	84,310	0.5%	1.5%
New York	1,138,182	1,151,659	1,182,857	1,197,378	1,217,512	1,226,619	7.9%	0.7%
North Carolina	416,316	409,453	418,473	419,683	429,707	439,672	2.8%	2.3%
North Dakota	31,559	32,137	34,564	37,735	45,385	49,772	0.3%	9.7%
Ohio	500,865	476,170	488,557	501,335	517,064	526,196	3.4%	1.8%
Oklahoma	150,225	146,987	148,038	153,104	157,737	164,303	1.1%	4.2%
Oregon	181,333	180,155	190,136	197,832	205,723	211,241	1.4%	2.7%
Pennsylvania	583,636	571,503	584,412	592,630	599,523	603,872	3.9%	0.7%
Rhode Island	47,890	47,592	48,719	48,649	49,262	49,962	0.3%	1.4%
South Carolina	166,467	160,046	162,616	167,704	170,212	172,176	1.1%	1.2%
South Dakota	36,467	36,979	37,960	39,804	39,906	41,142	0.3%	3.1%
Tennessee	256,518	247,465	252,035	258,988	267,554	269,602	1.7%	0.8%
Texas	1,173,481	1,167,233	1,201,992	1,252,007	1,338,578	1,387,598	8.9%	3.7%
Utah	116,272	114,433	116,761	120,211	126,193	131,017	0.8%	3.8%
Vermont	25,900	25,250	26,349	26,924	27,207	27,723	0.2%	1.9%
Virginia	406,303	406,066	417,978	420,802	426,133	426,423	2.7%	0.1%
Washington	358,158	350,125	356,398	358,869	371,156	381,017	2.5%	2.7%
West Virginia	63,263	62,752	64,553	66,138	65,221	68,541	0.4%	5.1%
Wisconsin	252,434	245,898	252,794	257,146	259,766	264,126	1.7%	1.7%
Wyoming	38,204	37,890	37,392	37,802	36,755	39,538	0.3%	7.6%

Notes:
1. In October of 2006, BEA renamed the gross state product (GSP) series to gross domestic product (GDP) by state.
2. GDP by state for 1997-2012 was revised June 2014.

Source: Bureau of Economic Analysis

Utah Taxable Sales

In 2014, Utah taxable sales benefited from economic conditions including a growing labor market and relatively high consumer confidence. Total taxable sales are currently estimated to increase by 4.0 percent in 2014 and are projected to increase by 5.6 percent in 2015. Growth in taxable sales in 2014 and 2015 is expected in each of the three major components of taxable sales: retail sales, business investment purchases, and taxable services. Projections are dependent on the improving economic conditions that have existed for most of 2014 continuing into 2015 and are subject to a number of national and global risk factors.

2014 Summary

In 2014 Utah total taxable sales were estimated to increase by 4.0 percent to an estimated $51.37 billion, the fifth consecutive year of growth following two years of decline. Taxable sales in 2014 were estimated to be 7.5 percent higher than pre-recession levels and nearly 27 percent higher than taxable sales in 2009. Growth in the range of 3.9 to 4.5 percent was expected across all three major components (retail sales, business investment purchases, and taxable services) of taxable sales in 2014. Growth in 2014 was restrained by slow growth in the first quarter of 2014 caused by a temporary national slowdown in economic activity during that quarter.

Retail Sales

Retail sales are a good indicator of economic activity, performing well during times of economic expansion and poorly during times of recession. Retail sales declined during the Great Recession but have grown in each of the five years since. In 2014, retail sales were estimated to increase by 4.3 percent to $26 billion. Retail sales are the largest component of total taxable sales, accounting for an estimated 50.7 percent of the total in 2014. Growth in retail sales for the three prior years (2011 to 2013) was in the range of 6.1 to 7.9 percent each year.

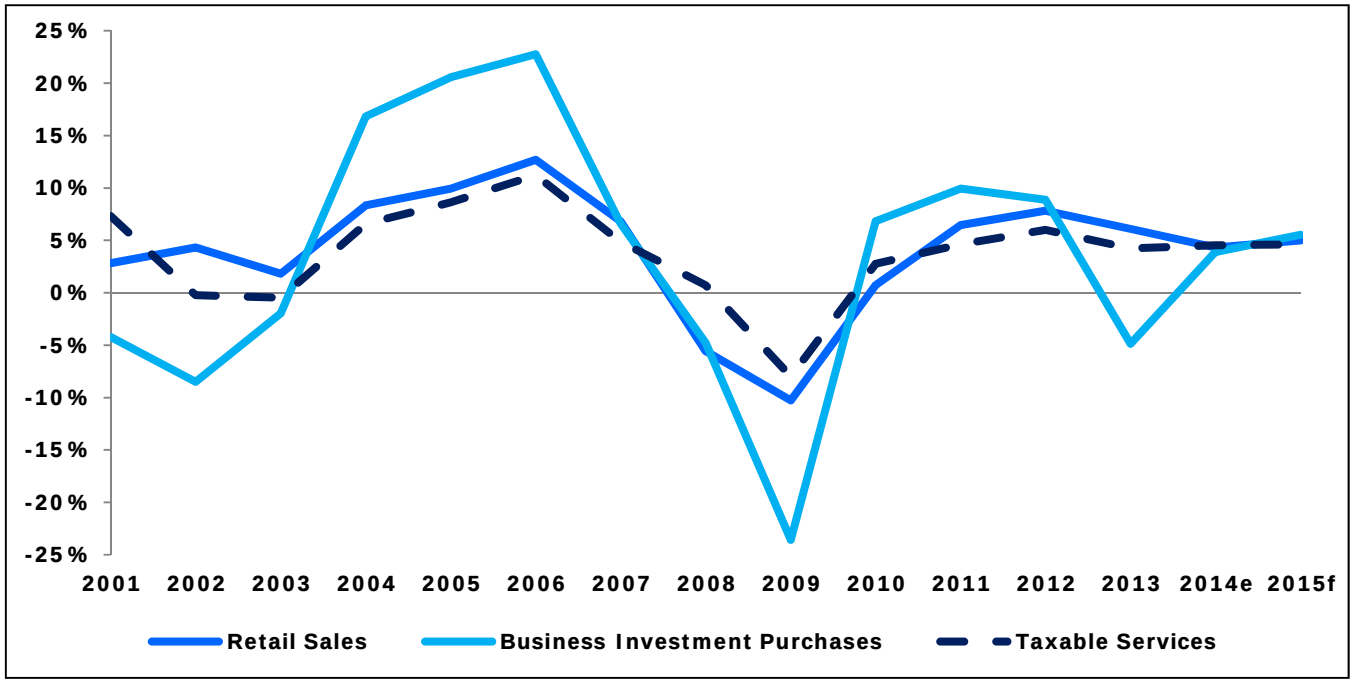
Business Investment Purchases

Following a down year in 2013, business investment purchases were estimated to rebound, increasing 3.9 percent in 2014. After being hindered by an environment of uncertainty in 2013, business investment purchases were estimated to grow in 2014. This category has historically been the most volatile of the three major components of taxable sales. Business investment purchases declined the most of any component during the recession and were the only major component of taxable sales to not reach or exceed pre-recession highs by 2014.

Taxable Services

In 2014 taxable services were estimated to account for 28.5 percent of total taxable sales. Taxable services were estimated to increase by 4.5 percent in 2014 to $14.65 billion. Growth since the recession has been steady with annual growth rates since 2011 ranging from 4.2 to 6 percent per year.

Figure 8.1
Percent Change in Utah Taxable Sales by Component



Source: Utah State Tax Commission

Significant Issues
Generally speaking, any event or change in conditions that impacts consumer confidence, or incomes will ultimately impact Utah taxable sales. In 2015, the greatest risks to projections originate outside of Utah's borders. Any significant changes in economic or political conditions nationally (federal fiscal policy, monetary policy, federal gridlock, etc.) or globally (European debt, conflict in the Middle East, economic slowdown in Asia, etc.) will impact 2015 forecasts for Utah taxable sales.

2015 Outlook
Positive trends seen in 2014 are expected to continue into 2015. Overall total taxable sales are projected to increase 5.6 percent. Economic factors contributing to expectations of continued growth in 2015 include: a strong labor market in Utah, growth in Utah personal income, and high consumer confidence. Growth is expected in all three major components of taxable sales. In 2015 retail sales are projected to grow by 5 percent, business investment purchases are projected to increase by 5.6 percent, and taxable services are projected to increase by 4.6 percent.

Conclusion
Improving economic conditions since the recession have led to significant growth in taxable sales. Although risks to the projections exist, moderate growth in Utah taxable sales is expected to continue through 2015, totaling six consecutive years of growth since 2009.

Figure 8.2
Utah Taxable Sales by Component

	Millions of Dollars					Percent Change				
Year	Retail Sales	Business Investment Purchases	Taxable Services	All Other	Total Taxable Sales	Retail Sales	Business Investment Purchases	Taxable Services	All Other	Total Taxable Sales
2000	$15,317	$5,953	$8,836	$1,376	$31,482					
2001	15,752	5,701	9,482	1,528	32,463	2.8	-4.2	7.3	11.0	3.1
2002	16,432	5,216	9,459	1,299	32,407	4.3	-8.5	-0.2	-14.9	-0.2
2003	16,730	5,115	9,414	1,268	32,527	1.8	-2.0	-0.5	-2.4	0.4
2004	18,128	5,977	10,035	1,287	35,427	8.4	16.8	6.6	1.5	8.9
2005	19,934	7,207	10,902	1,367	39,409	10.0	20.6	8.6	6.1	11.2
2006	22,464	8,848	12,125	1,621	45,057	12.7	22.8	11.2	18.6	14.3
2007	23,998	9,432	12,718	1,647	47,795	6.8	6.6	4.9	1.6	6.1
2008	22,659	8,981	12,811	1,483	45,934	-5.6	-4.8	0.7	-9.9	-3.9
2009	20,329	6,864	11,790	1,499	40,481	-10.3	-23.6	-8.0	1.1	-11.9
2010	20,475	7,333	12,114	1,465	41,387	0.7	6.8	2.8	-2.3	2.2
2011	21,801	8,063	12,676	1,556	44,097	6.5	10.0	4.6	6.3	6.5
2012	23,512	8,780	13,439	1,800	47,531	7.9	8.9	6.0	15.7	7.8
2013	24,944	8,352	14,008	2,100	49,404	6.1	-4.9	4.2	16.6	3.9
2014e	26,022	8,679	14,645	2,023	51,369	4.3	3.9	4.5	-3.6	4.0
2015f	27,322	9,161	15,322	2,450	54,255	5.0	5.6	4.6	21.1	5.6

Notes: 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: Ag 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, Admin. & Support & Waste Manag. & Remed. 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

Figure 8.3
Utah Taxable Sales by County

County	Millions of Dollars					Percent Change 2012-2013	2013 % of Total Taxable Sales
	2009	2010	2011	2012	2013		
Beaver	82.4	98.6	106.1	83.2	108.8	30.8%	0.2%
Box Elder	541.4	621.3	585.7	526.0	565.5	7.5%	1.1%
Cache	1,274.6	1,324.8	1,335.7	1,370.4	1,446.5	5.6%	2.9%
Carbon	413.4	436.8	464.3	420.0	403.6	-3.9%	0.8%
Daggett	14.7	15.5	13.2	15.4	18.7	21.6%	0.0%
Davis	3,590.7	3,599.4	3,784.5	4,001.7	4,268.2	6.7%	8.6%
Duchesne	402.9	471.4	626.9	830.3	876.6	5.6%	1.8%
Emery	162.3	187.8	178.4	141.9	127.7	-10.0%	0.3%
Garfield	98.2	102.4	84.8	122.0	111.1	-8.9%	0.2%
Grand	257.6	263.3	279.4	310.2	336.3	8.4%	0.7%
Iron	550.2	551.3	568.8	593.5	642.5	8.3%	1.3%
Juab	80.5	86.4	100.4	111.1	89.2	-19.7%	0.2%
Kane	125.7	137.9	148.0	152.4	157.3	3.2%	0.3%
Millard	142.3	173.9	168.8	159.5	179.8	12.7%	0.4%
Morgan	69.6	68.5	75.9	72.9	75.6	3.7%	0.2%
Piute	7.5	7.4	8.3	8.3	8.2	-0.9%	0.0%
Rich	26.4	41.6	103.0	26.8	29.7	10.8%	0.1%
Salt Lake	18,286.6	18,498.8	19,672.2	21,387.8	21,986.1	2.8%	44.5%
San Juan	148.6	181.6	205.5	205.1	212.1	3.4%	0.4%
Sanpete	191.4	183.5	195.9	209.3	211.0	0.8%	0.4%
Sevier	302.9	303.0	316.7	323.2	347.2	7.4%	0.7%
Summit	1,116.5	1,189.7	1,324.3	1,360.9	1,469.8	8.0%	3.0%
Tooele	541.6	581.2	600.9	656.3	618.9	-5.7%	1.3%
Uintah	1,079.3	1,158.1	1,353.8	1,649.6	1,453.7	-11.9%	2.9%
Utah	5,638.1	5,784.8	6,264.4	6,886.1	7,186.9	4.4%	14.5%
Wasatch	247.0	271.1	296.2	336.5	386.2	14.8%	0.8%
Washington	1,961.5	2,017.5	2,121.5	2,306.4	2,555.2	10.8%	5.2%
Wayne	30.4	32.4	33.8	34.6	39.4	13.9%	0.1%
Weber	3,155.1	3,075.4	3,166.5	3,342.0	3,527.3	5.5%	7.1%

Source: Utah State Tax Commission

Tax Collections

In 2014, the improving economic conditions that have existed since the Great Recession resulted in increases in tax collections in the State of Utah. Total unrestricted state revenues increased 2.1 percent in fiscal year (FY) 2014 following a 7.6 percent increase in FY2013. Tax collections for both sales and income tax, which account for approximately 75 percent of all unrestricted revenue, increased in FY2014. The outlook for tax collections is positive with continued growth in total unrestricted tax revenue expected in FY2015. Tax collections are highly dependent on economic conditions. Consequently, forecasts of tax collections are subject to a number of economic risks.

2014 Summary

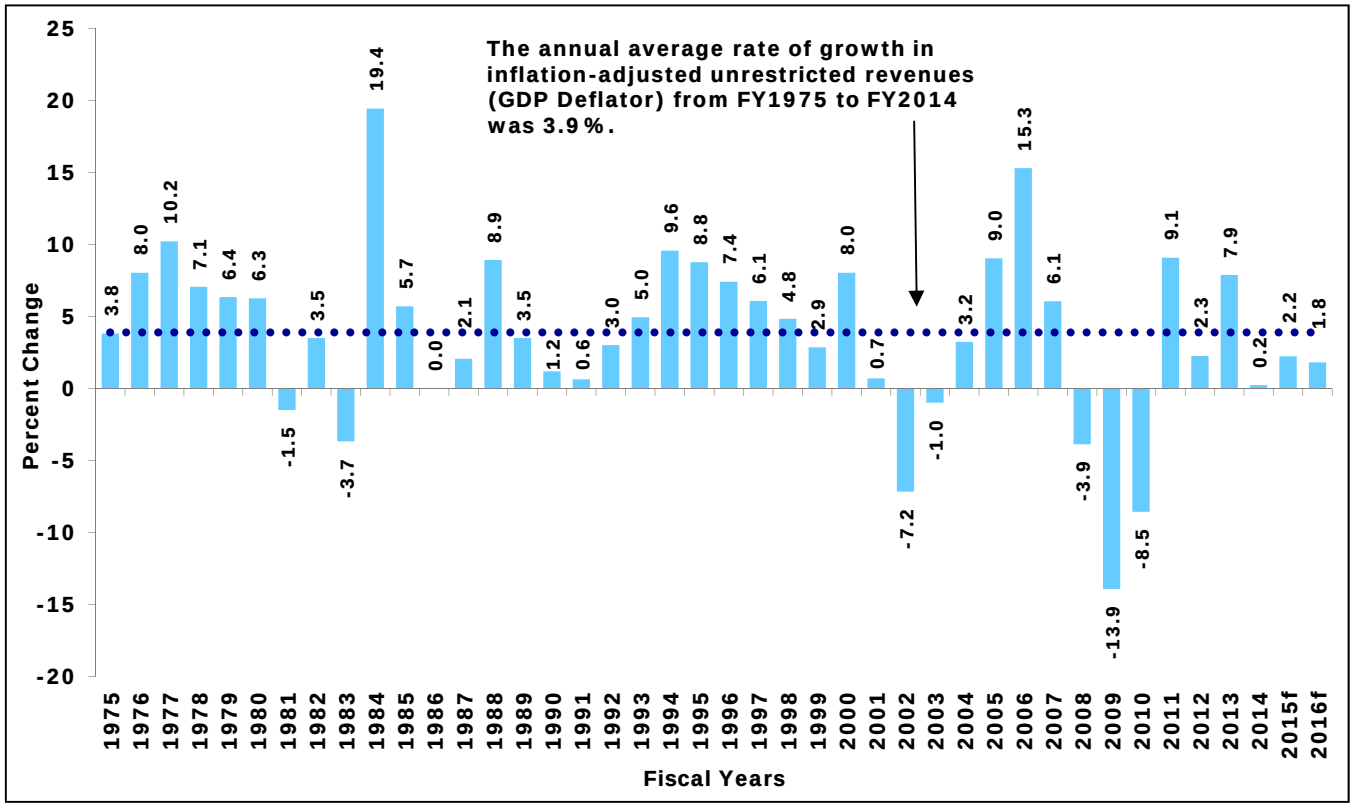
FY2014 brought the fourth consecutive year of positive growth in total unrestricted revenue. Total unrestricted revenues (from the General Fund, Education Fund, Transportation Fund, and mineral lease payments) of $6,027.84 million in FY2014 exceeded the February forecast (adjusted for legislation passed during the 2014 General Session) by $181.9 million. The General Fund grew by 3.6 percent while the Education Fund and Transportation Fund increased 0.5 percent and 0.3 percent, respectively.

General Fund

General Fund free revenue increased 3.6 percent to $2,160.8 million in FY2014. Sales tax free revenue, the largest source of revenue in the General Fund, grew 2.5 percent in FY2014. The growth in unrestricted sales tax revenue was restrained due to significant growth in sales tax earmarks in recent years. Sales tax earmarks grew 7.2 percent in FY2014 following a 27.1 percent increase in FY2013. In FY2014 sales tax revenues earmarked for various purposes including transportation, water, natural resources, and other purposes totaled $452.5 million, up significantly since 2011 when earmarks totaled $189.2 million. When earmarks are included, the state sales tax increased 3.5 percent in FY2014. Increases in sales tax revenues are driven by growth in Utah taxable sales which have benefited from increases in employment, personal income, and consumer confidence.

Other large General Fund revenue sources showing significant changes in FY2014 include liquor profits, oil and gas severance tax, and beer, cigarette, and tobacco. Total liquor profits jumped 7.9 percent as consumption, demographic patterns, and economic factors combined to push sales up. FY2014 oil and gas severance taxes jumped

Figure 9.1
Inflation-Adjusted Percentage Change in Unrestricted General and Education Fund Revenue



Source: Utah State Tax Commission f = forecast

67.7 percent after falling 18.9 percent in FY2013. Increases in Oil and Gas Severance tax are attributed to increases in oil production and oil and gas prices. FY2014 beer, cigarette, and tobacco taxes fell 6.4 percent, greater than the 3.6 percent decline forecasted in February. Most of the decrease is attributable to declining cigarette tax revenue, down 8.8 percent in FY2014 and down 4.5 percent in FY2013. Decreases in cigarette taxes may be due to changing consumer preferences, which include some users substituting electronic cigarettes in place of conventional cigarettes.

Education Fund

Education Fund revenues increased 0.4 percent to $3,258.9 million in FY2014. Most of the Education Fund revenues come from the individual income tax and corporate tax. Individual income taxes rose 1.3 percent in FY2014 compared to 16 percent growth in FY2013. Federal tax changes caused certain (higher income) individuals to shift income into tax year 2012 (FY2013) from future years to avoid higher tax rates on capital gains and dividends. Absent this change, income tax in FY2013 would have been lower and FY2014 higher. In FY2013 gross final payments were up $233 million or 33.8 percent from the prior year. In FY2014 final payments were able to retain much of those gains and only declined 4.3 percent (still up 28.1 percent from FY2012). Withholding grew 3.9 percent to $2,404.8 million and refunds which totaled $397.3 million rose 3.5 percent. Increases in withholding are due to increases in both employment and income.

Corporate tax collections finished the year down 7.3 percent, less severe than the 13.8 percent decline forecasted in February 2014. Some decline had been expected following near 26 percent growth in FY2013. Mineral production withholding jumped 24.1 percent from $26.1 million in FY2013 to $32.4 million in FY2014.

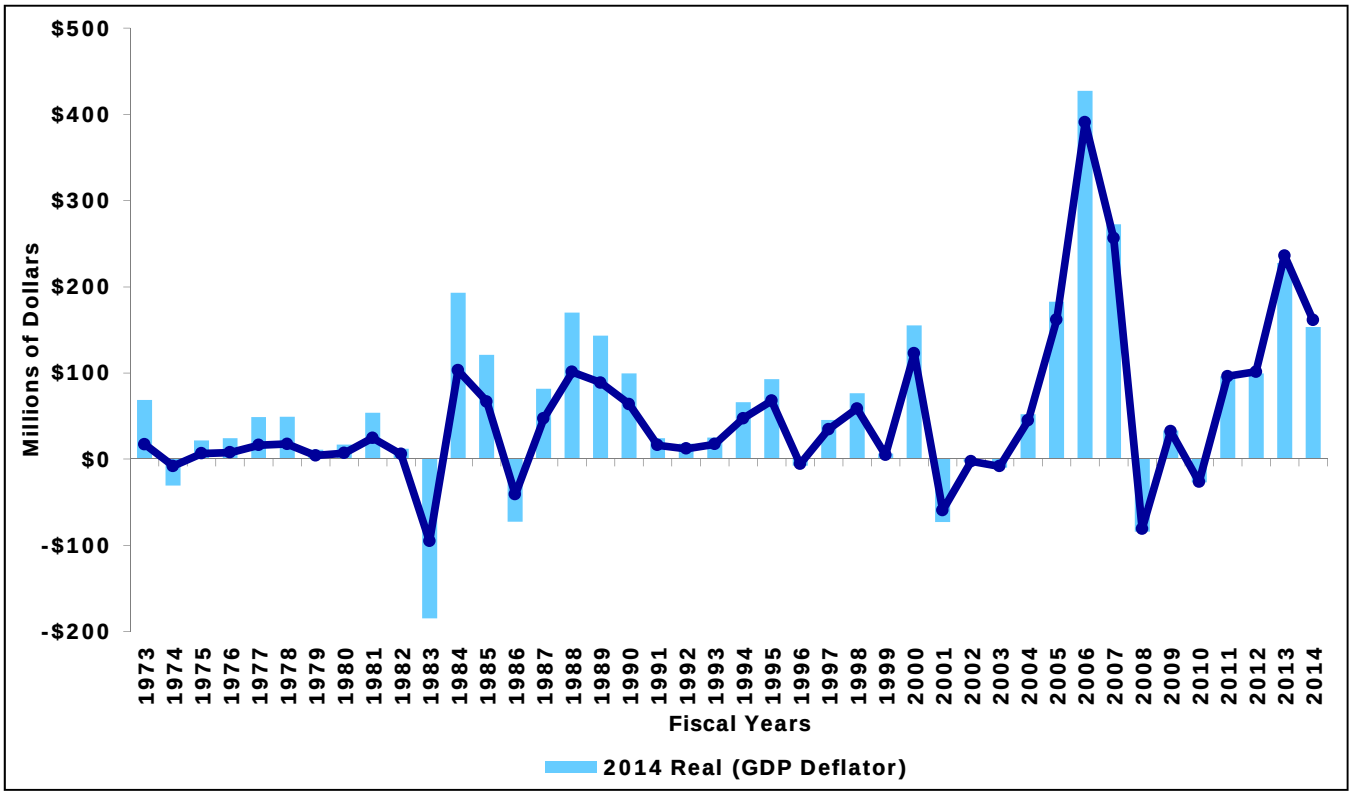
Transportation Fund

Transportation Fund revenues of $440.5 million were up 0.3 percent in FY2014. In FY2013 Transportation Fund revenues were up 0.7 percent. Growth in fuel tax revenues (both motor and special fuel) has been subdued in recent years as consumers switch to alternative fuel vehicles or vehicles that are more fuel efficient.

Significant Issues

Any disruption to local, national, or global economies has the potential to impact Utah tax collections. Currently, the most likely disruptions are found either nationally or globally. Concerns with the potential to negatively impact future

Figure 9.2
Actual and Inflation-Adjusted Unrestricted Revenue Surplus/Deficit for the General and Education Fund



Source: Governor's Office of Management and Budget

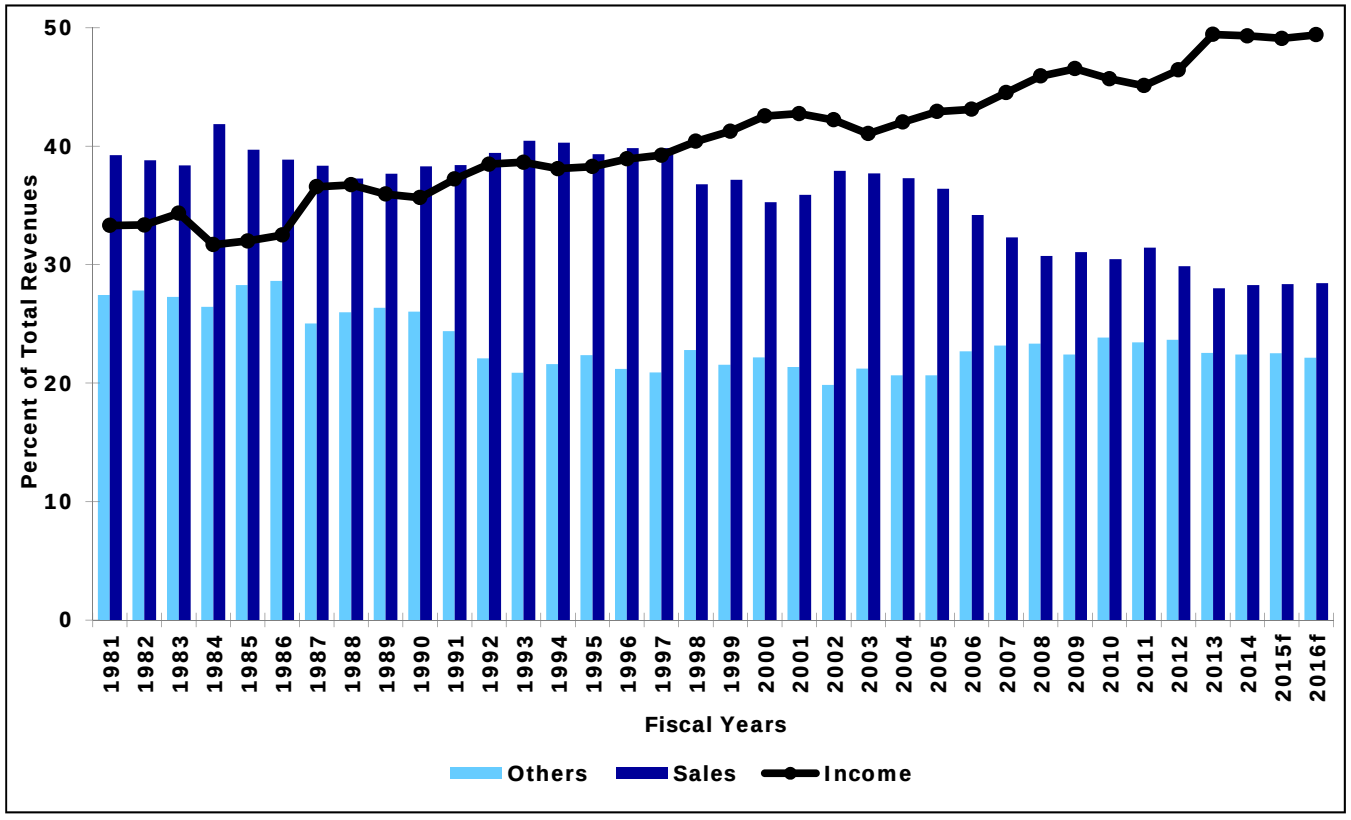
revenues include the following: economic weakness in China and the Eurozone, political turmoil in the Middle East, Eastern Europe, and abroad; monetary tightening by the Federal Reserve Bank and the resulting negative impact on interest rates; political gridlock in Washington; and a slowdown in the rate of growth in the labor market.

In addition to disruptions in economies, changes in legislation also have the potential to impact tax collections, negatively or positively. One item of note is the erosion of sales tax revenue from the growth in online or "remote" sales. There is currently legislation pending in Congress called the "Marketplace Fairness Act" that would allow states to collect sales and use tax from remote sellers with no nexus (physical presence) in the state. Utah has statute in place that would allow sales tax to be charged on non-nexus sales if Congress were to pass this act.

2015 Outlook

Forecasts of economic indicators for 2015 are generally positive. Forecasted growth in Utah personal income is expected to drive increases in Utah's two primary sources of revenue (sales and income taxes). The outlook for FY2015 is for a 3.8 percent increase in total unrestricted revenue. FY2015 General Fund revenues are forecasted to increase 3.4 percent led by a 4.1 percent increase in sales tax (5.6 percent when earmarks are included). Education Fund revenues are forecast to increase 4.5 percent in FY2015 with income tax revenue increasing 3.3 percent. Transportation Fund revenues are expected to continue to remain relatively flat in FY2015, increasing by only 0.7 percent.

Figure 9.3
Sales Tax, Income Tax, and All Other Unrestricted Revenues as a Percent of Total State Unrestricted Revenues



*Total State Unrestricted Revenues includes General Fund, Education Fund, and Transportation Fund revenues. Mineral lease revenues are not included. The "Others" category includes all other revenue sources in those funds except for Sales and Income tax.

Source: Utah State Tax Commission and Governor's Office of Management and Budget

Figure 9.4
Fiscal Year Revenue Collections

Revenue Source	Millions of Dollars																
	2000	**2001**	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015f**	**2016f**
Sales and Use Tax	$1,369.6	$1,431.4	$1,441.3	$1,444.0	$1,501.9	$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	$1,724.8	$1,790.4
Earmarked Sales and Use Tax	*39.2*	*43.7*	*43.2*	*29.0*	*39.1*	*42.0*	*100.2*	*250.0*	*325.3*	*276.3*	*301.0*	*189.2*	*332.1*	*422.1*	*452.5*	*502.9*	*551.6*
Total Sales and Use Tax	*1,408.8*	*1,475.1*	*1,484.5*	*1,472.9*	*1,541.1*	*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*	*2,227.7*	*2,342.0*
Cable/Satellite Excise Tax	0.0	0.0	0.0	0.0	0.0	11.7	20.5	20.8	24.1	24.8	25.3	25.4	28.7	26.9	26.0	26.4	26.4
Liquor Profits	28.7	30.3	32.6	31.7	37.7	38.1	47.3	53.2	59.7	59.7	58.4	62.3	70.8	81.4	87.8	92.9	96.5
Insurance Premiums	52.2	46.0	56.6	59.0	62.4	67.4	71.4	71.8	77.2	83.0	80.0	75.9	84.4	89.6	91.2	94.1	96.4
Beer, Cigarette, and Tobacco	58.0	57.9	60.0	54.2	62.8	61.9	60.8	62.4	62.8	60.6	58.7	125.5	125.4	120.9	113.1	109.0	104.8
Oil and Gas Severance Tax	17.3	39.4	18.9	26.7	36.7	53.5	71.5	65.4	65.5	71.0	56.2	59.9	65.5	53.2	89.2	92.2	96.5
Metal Severance Tax	5.7	6.2	5.0	5.8	6.0	11.4	17.0	23.6	26.5	14.6	20.9	27.1	25.4	16.9	15.9	18.0	18.6
Inheritance Tax	64.6	30.0	9.4	33.0	9.7	3.0	7.4	0.5	0.1	0.3	0.1	0.1	0.0	0.0	0.0	0.0	0.0
Investment Income	19.5	27.5	9.7	6.5	5.5	13.6	40.0	83.5	62.8	25.1	5.3	2.4	5.6	6.0	5.0	5.1	5.6
General Fund Other	40.8	46.0	45.3	46.7	45.6	46.4	50.8	58.0	53.4	54.4	80.3	72.3	95.9	80.4	81.8	77.4	78.9
Property and Energy Credit	-4.4	-5.4	-5.3	-5.5	-5.6	-5.9	-5.6	-6.2	-6.4	-6.2	-6.4	-6.0	-6.8	-6.3	-6.0	-6.2	-6.3
General Fund Total	**1,652.1**	**1,709.3**	**1,673.5**	**1,702.1**	**1,762.7**	**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**	**2,233.8**	**2,307.9**
GF & Earmarks Total	***1,691.3***	***1,753.0***	***1,716.7***	***1,731.1***	***1,801.8***	***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***	***2,736.7***	***2,859.5***
Individual Income Tax	1,651.4	1,705.3	1,605.3	1,572.5	1,692.3	1,926.6	2,277.6	2,561.4	2,598.8	2,319.6	2,104.6	2,298.2	2,459.4	2,852.02	2,889.8	2986.2	3110.0
Withholding	*1,452.7*	*1,527.5*	*1,571.9*	*1,544.6*	*1,617.9*	*1,741.6*	*1,929.6*	*2,124.0*	*2,138.2*	*1,962.3*	*1,942.1*	*2,035.3*	*2,151.8*	*2,313.7*	*2,404.8*	*2507*	*2607.3*
Final Payments	*487.9*	*487.5*	*396.1*	*381.5*	*432.2*	*549.8*	*745.2*	*902.1*	*962.7*	*753.4*	*613.8*	*669.3*	*689.0*	*922.0*	*882.2*	*874*	*907*
Refunds	*-289.2*	*-309.7*	*-362.7*	*-353.6*	*-357.8*	*-364.9*	*-397.2*	*-464.7*	*-502.1*	*-396.1*	*-451.3*	*-406.4*	*-381.4*	*-383.7*	*-397.3*	*-394.8*	*-404.3*
Corporate Taxes	181.1	171.1	119.0	156.3	158.2	204.2	366.6	414.1	405.1	255.4	258.4	260.7	268.9	338.2	313.5	360.4	370.1
Mineral Production Wittholding	9.3	19.5	13.2	7.2	17.3	16.7	22.7	23.1	23.8	32.5	24.6	26.7	28.3	26.1	32.4	34.8	35.6
Education Fund Other	8.5	9.7	5.6	5.0	4.5	0.0	9.8	18.2	20.1	19.3	24.6	26.6	25.2	27.8	23.2	22.6	23.2
Education Fund Total	**1,850.4**	**1,905.5**	**1,743.0**	**1,741.0**	**1,872.2**	**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**	**3,404.0**	**3,538.97**
GF/EF Total	**3,502.4**	**3,614.8**	**3,416.5**	**3,443.1**	**3,634.9**	**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**	**5,637.8**	**5,846.8**
GF/EF & Earmarks Total	***3,541.6***	***3,658.5***	***3,459.7***	***3,472.0***	***3,674.0***	***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***	***6,140.7***	***6,398.4***
Motor Fuel Tax	237.6	229.4	237.9	236.6	239.9	241.5	240.4	254.7	250.7	235.5	243.3	252.5	253.0	256.9	256.8	257.2	258.9
Special Fuel Tax	76.6	80.6	84.4	84.5	86.2	93.8	101.1	111.1	113.0	101.2	94.4	102.2	104.1	101.4	101.7	101.4	102.1
Other	64.9	64.2	62.8	65.4	64.9	70.0	76.6	78.8	82.4	85.4	73.6	80.7	79.2	81.2	82.0	84.9	86.4
Transportation Fund Total	**379.0**	**374.2**	**385.1**	**386.6**	**391.0**	**405.3**	**418.1**	**444.6**	**446.0**	**422.1**	**411.4**	**435.4**	**436.2**	**439.4**	**440.5**	**443.5**	**447.4**
Mineral Lease Payments	39.6	57.9	36.5	53.1	74.8	92.0	170.0	160.9	150.3	189.1	147.2	152.8	194.0	136.9	167.6	177.5	182.1
TOTAL	**3,921.1**	**4,046.8**	**3,838.1**	**3,882.7**	**4,100.7**	**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**	**6,027.84**	**6,258.8**	**6,476.4**
TOTAL & Eamarks	***3,960.3***	***4,090.5***	***3,881.3***	***3,911.7***	***4,139.8***	***4,622.3***	***5,552.6***	***6,163.2***	***6,134.6***	***5,449.0***	***5,053.2***	***5,435.9***	***5,821.6***	***6,327.44***	***6,480.31***	***6,761.7***	***7,027.9***

Source: Utah State Tax Commission and Governor's Office of Management and Budget

Figure 9.5
Percent Change of Fiscal Year Revenue Collections

Revenue Source	2010	2011	2012	2013	2014	2015f	2016f
Sales and Use Tax	-9.4%	14.2%	-1.2%	2.1%	2.5%	4.1%	3.8%
Earmarked Sales and Use Tax	*8.9*	*-37.2*	*75.6*	*27.1*	*7.2*	*11.1*	*9.7%*
Total Sales and Use Tax	*-6.6*	*5.1*	*6.9*	*6.4*	*3.5*	*5.6*	*5.1%*
Cable/Satellite Excise Tax	2.0	0.3	13.0	-6.1	-3.5	1.7	-0.1
Liquor Profits	-2.2	6.8	13.6	14.9	7.9	5.9	3.8
Insurance Premiums	-3.6	-5.2	11.2	6.1	1.8	3.2	2.5
Beer, Cigarette, and Tobacco	-3.1	113.8	-0.1	-3.6	-6.4	-3.7	-3.8
Oil and Gas Severance Tax	-20.8	6.5	9.5	-18.9	67.7	3.5	4.6
Metal Severance Tax	43.2	30.0	-6.3	-33.3	-6.4	13.3	3.5
Inheritance Tax	-81.1	113.8	-100.0	0.0	0.0	0.0	0.0
Investment Income	-78.8	-55.0	135.2	6.8	-16.3	1.4	10.2
General Fund Other	47.6	-9.9	32.7	-16.1	1.7	-5.4	2.0
Property and Energy Credit	2.4	-6.4	13.8	-7.7	-5.0	4.0	2.2
General Fund Total	**-7.9**	**14.9**	**1.5**	**0.4**	**3.6**	**3.4**	**3.3**
GF & Earmarks Total	***-5.8***	***7.3***	***7.8***	***4.0***	***4.2***	***4.7***	***4.5***
Individual Income Tax	-9.3	9.2	7.0	16.0	1.3	3.3	4.1
Withholding	*-1.0*	*4.8*	*5.7*	*7.5*	*3.9*	*4.2*	*4.0*
Final Payments	*-18.5*	*9.0*	*2.9*	*33.8*	*-4.3*	*-0.9*	*3.8*
Refunds	*13.9*	*-9.9*	*-6.2*	*0.6*	*3.5*	*-0.6*	*2.4*
Corporate Taxes	1.2	0.9	3.1	25.8	-7.3	15.0	2.7
Mineral Production Withholding	-24.4	8.7	6.2	-8.0	24.1	7.4	2.5
Education Fund Other	27.4	8.1	-5.4	10.4	-16.6	-2.4	2.6
Education Fund Total	**-8.2**	**8.3**	**6.5**	**16.6**	**0.5**	**4.5**	**4.0**
GF/EF Total	**-8.1**	**11.1**	**4.3**	**9.7**	**1.7**	**4.0**	**3.7**
GF/EF & Earmarks Total	***-7.1***	***7.9***	***7.1***	***10.8***	***2.1***	***4.6***	***4.2***
Motor Fuel Tax	3.3	3.8	0.2	1.5	0.0	0.2	0.7
Special Fuel Tax	-6.7	8.2	1.9	-2.6	0.3	-0.3	0.7
Other	-13.8	9.6	-1.9	2.5	1.1	3.5	1.8
Transportation Fund Total	**-2.5**	**5.8**	**0.2**	**0.7**	**0.3**	**0.7**	**0.9**
Mineral Lease Payments	-22.2	3.8	27.0	-29.4	22.4	5.9	2.6
TOTAL	**-8.1**	**10.4**	**4.6**	**7.6**	**2.1**	**3.8**	**3.5**
TOTAL & Eamarks	***-7.3***	***7.6***	***7.1***	***8.7***	***2.4***	***4.3***	***3.9***

Source: Utah State Tax Commission and Governor's Office of Management and Budget

Exports

In the face of declining gold prices, the value of Utah's total merchandise exports fell by 16 percent in 2013, bucking a decade long trend of steadily increasing export values. The long-term future of Utah's export industries is bright, however, as non-gold exports, the major job producer, continue to grow steadily and Utah's export profile will gradually become more diversified on both sectoral and regional dimensions. Exports of computers and electronics, food products, and electrical equipment are the main areas of growth on the sectoral dimension, while dynamic growth in East and Southeast Asia has opened up new exporting opportunities, with Hong Kong, China, Thailand, Singapore, and Japan developing into major export partners. According to International Trade Administration data, exports from Utah supported 61,000 jobs in the state in 2013.

2013 Summary

Utah's Merchandise Exports in a National and Local Context

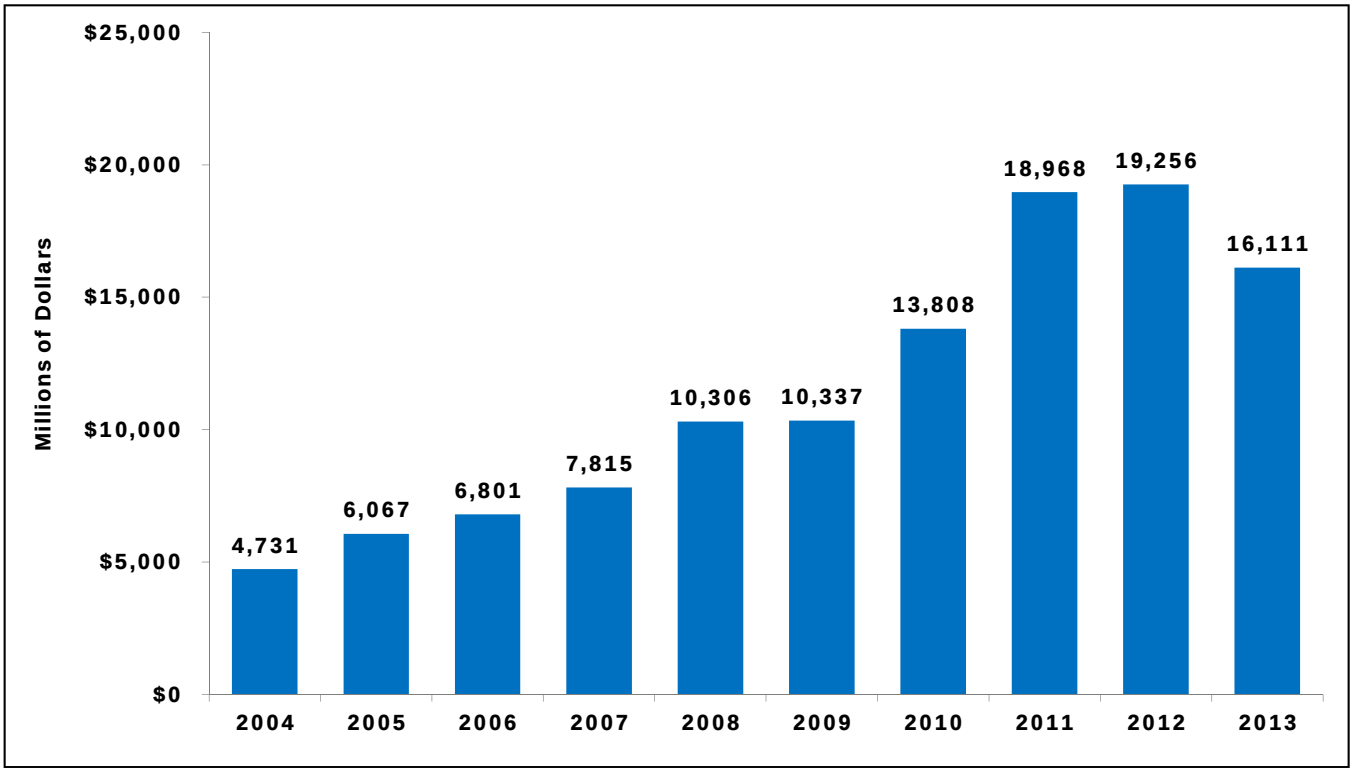
Utah's merchandise exports have grown by over 240 percent over the last ten years. This is the third highest rate of export growth in the nation, behind only Mississippi and North Dakota. Between 2012 and 2013, however, Utah joined almost half of the states in seeing its total merchandise exports decline, for the first time in a decade. The value of total merchandise exports from Utah in 2013 stood at $16 billion, or 1 percent of total national exports. Utah is currently the 26th largest exporting state in the nation, down from 22nd in 2012, but up from 31st position at the beginning of the decade. Texas and California lead the nation in merchandise exports with $279 billion and $168 billion, respectively, representing 18 percent and 11 percent of the nation's total merchandise exports.

The majority of Utah's exports are generated from Salt Lake City ($11.0 billion), followed by Provo-Orem ($2.8 billion), Ogden-Clearfield ($1.3 billion), Logan ($400 million), and St George ($54 million).

Utah's Merchandise Exports by Industry

Utah's leading export industry continues to be primary metal products, dominated by gold. This sector accounted for approximately 52 percent of Utah's total merchandise exports in 2013, down from 63 percent in 2012 but up from 32 percent a decade ago. The value of primary metal exports in 2013 stood at $8.3 billion, a fall of 32 percent from the previous year. Indeed, a sharp fall in the price of gold beginning in late 2012 and continuing in 2013 explains all of the decline in Utah's total merchandise export value over the previous year.

Figure 10.1
Utah Merchandise Exports



Source: U.S. Census Bureau, Foreign Trade

Utah's export profile is becoming increasingly diversified. The second largest export category in 2013 was computers and electronics, which at $2.5 billion accounted for 16 percent of Utah's total merchandise exports. Other major export categories in 2013 included food products ($955 million, 6 percent of total), chemicals ($831 million, 5 percent of total), transportation equipment ($817 million, 5 percent of total), and machinery ($558 million, 3.5 percent of total).

In addition to computers and electronics, in 2013 Utah had substantial export growth in the following merchandise categories: oil and gas (up over 7000 percent from a small base to $48 million), forestry products (up 102 percent to $1.7 million), livestock and livestock products (up 66 percent to $6.9 million), electrical equipment (up 41 percent to $252 million), and raw textiles (up 23 percent to $12 million). On the other hand, in addition to the decline in gold exports there were substantial contractions in the exports of petroleum and coal (down 67 percent to $13 million), wood products (down 64 percent to $3.4 million), publications (down 50 percent to $600,000), minerals (35 percent to $173 million), and scrap (down 24 percent to $141 million).

Gold vs Non Gold

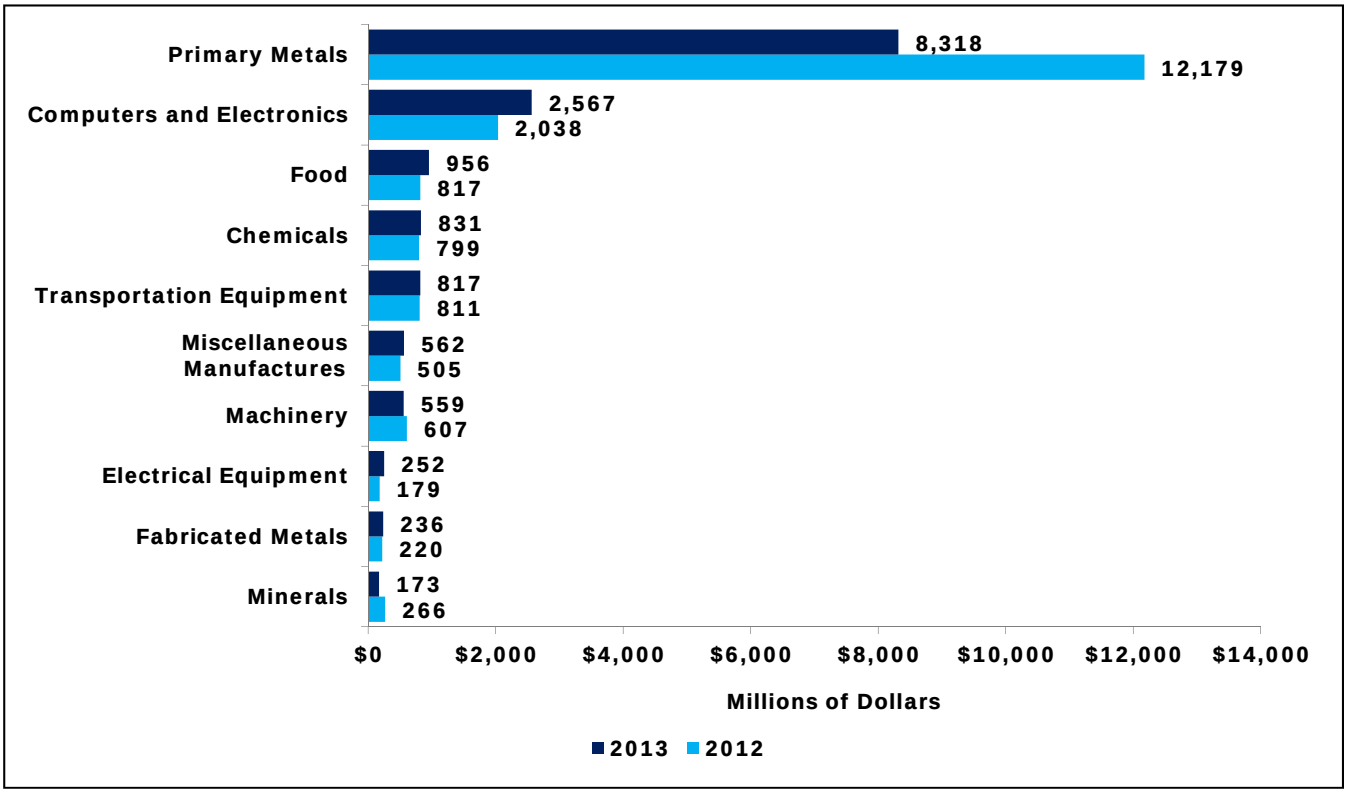
Utah continues to be a large exporter of gold, although much of the recorded export value represents partially refined ore shipped into Utah from other western states for final processing into pure gold and then shipping to customers worldwide. While the value of Utah's gold exports can fluctuate substantially with the price of gold on global markets, gold exports do not provide a substantial number of jobs for the state. Hence, it is important to consider the pattern of growth in Utah's exports both with and without gold shipments

While much of Utah's export growth has come from the increasing value of gold shipments over the last ten years, the value of shipments dropped substantially in 2013 (by nearly 30 percent). On the other hand, non-gold exports have exhibited steady growth over the last decade, and this continued in 2013. Excluding gold, Utah exports grew from $6.6 billion in 2012 to $7.3 billion in 2013, a 10.2 percent increase.

Destination of Utah's Merchandise Exports

In 2013, Hong Kong overtook the United Kingdom as Utah's single largest export destination, with exports totaling over $5.5 billion, a 32 percent rise over 2012 and representing over 34 percent of Utah's total exports. The commodity profile of exports to Hong Kong is dominated by gold. Utah's second largest export destination was China ($1.4 billion, 9 percent of total merchandise exports), which was

Figure 10.2
Utah Merchandise Exports of Top Ten Export Industries



Source: U.S. Census Bureau, Foreign Trade

Figure 10.3
Merchandise Exports by State

Rank	Geography	Millions of Dollars 2008	2009	2010	2011	2012	2013	2012-2013 Percent Change	2013 Share
22	Alabama	$15,879	$12,355	$15,495	$17,928	$19,577	$19,291	-1.5%	1.2%
40	Alaska	3,542	3,270	4,155	5,259	4,543	4,528	-0.3%	0.3%
21	Arizona	19,784	14,023	15,721	17,885	18,405	19,410	5.5%	1.2%
36	Arkansas	5,776	5,267	5,219	5,611	7,615	7,154	-6.1%	0.5%
2	California	144,806	120,080	143,208	159,421	161,746	168,045	3.9%	10.6%
34	Colorado	7,713	5,867	6,726	7,338	8,167	8,547	4.6%	0.5%
25	Connecticut	15,384	13,979	16,029	16,233	15,872	16,424	3.5%	1.0%
39	Delaware	4,898	4,312	4,945	5,516	5,114	5,343	4.5%	0.3%
45	District of Columbia	1,196	1,091	1,483	1,041	2,014	2,708	34.4%	0.2%
7	Florida	54,238	46,888	55,399	65,010	66,232	61,344	-7.4%	3.9%
11	Georgia	27,514	23,743	28,899	34,863	36,072	37,517	4.0%	2.4%
51	Hawaii	960	563	684	884	732	598	-18.3%	0.0%
38	Idaho	5,005	3,877	5,157	5,913	6,120	5,782	-5.5%	0.4%
5	Illinois	53,677	41,626	50,061	64,903	68,157	66,089	-3.0%	4.2%
13	Indiana	26,502	22,907	28,764	32,332	34,399	34,162	-0.7%	2.2%
27	Iowa	12,125	9,042	10,880	13,317	14,625	13,888	-5.0%	0.9%
29	Kansas	12,514	8,917	9,900	11,623	11,701	12,465	6.5%	0.8%
18	Kentucky	19,121	17,650	19,346	20,119	22,132	25,366	14.6%	1.6%
6	Louisiana	41,908	32,616	41,371	54,971	62,877	63,339	0.7%	4.0%
46	Maine	3,016	2,231	3,162	3,422	3,048	2,687	-11.9%	0.2%
31	Maryland	11,383	9,225	10,167	10,863	11,743	11,752	0.1%	0.7%
16	Massachusetts	28,369	23,593	26,305	27,871	25,615	26,823	4.7%	1.7%
8	Michigan	45,136	32,655	44,851	51,064	57,051	58,653	2.8%	3.7%
20	Minnesota	19,186	15,532	18,904	20,732	20,827	20,772	-0.3%	1.3%
30	Mississippi	7,323	6,316	8,224	10,939	11,793	12,391	5.1%	0.8%
28	Missouri	12,852	9,522	12,925	14,161	13,903	12,932	-7.0%	0.8%
49	Montana	1,395	1,053	1,393	1,592	1,576	1,506	-4.4%	0.1%
35	Nebraska	5,412	4,873	5,821	7,588	7,455	7,393	-0.8%	0.5%
32	Nevada	6,121	5,672	5,913	7,990	10,262	8,701	-15.2%	0.6%
41	New Hampshire	3,752	3,061	4,368	4,307	3,489	4,184	19.9%	0.3%
12	New Jersey	35,643	27,244	32,131	38,172	37,301	36,726	-1.5%	2.3%
44	New Mexico	2,783	1,270	1,543	2,096	2,958	2,728	-7.8%	0.2%
3	New York	81,386	58,743	69,685	84,999	81,341	86,523	6.4%	5.5%
15	North Carolina	25,091	21,793	24,918	27,067	28,839	29,340	1.7%	1.9%
43	North Dakota	2,772	2,193	2,532	3,393	4,309	3,729	-13.5%	0.2%
9	Ohio	45,628	34,104	41,505	46,458	48,645	50,799	4.4%	3.2%
37	Oklahoma	5,077	4,415	5,354	6,228	6,579	6,919	5.2%	0.4%
23	Oregon	19,352	14,907	17,684	18,317	18,388	18,640	1.4%	1.2%
10	Pennsylvania	34,649	28,381	34,943	41,103	38,850	41,161	5.9%	2.6%
47	Rhode Island	1,974	1,496	1,949	2,289	2,370	2,163	-8.7%	0.1%
17	South Carolina	19,853	16,488	20,336	24,733	25,103	26,253	4.6%	1.7%
48	South Dakota	1,654	1,011	1,259	1,462	1,557	1,586	1.8%	0.1%
14	Tennessee	23,238	20,484	25,948	30,016	31,142	32,315	3.8%	2.0%
1	Texas	192,222	162,995	206,992	251,104	264,667	279,491	5.6%	17.7%
26	Utah	10,306	10,337	13,808	18,968	19,256	16,111	-16.3%	1.0%
42	Vermont	3,697	3,219	4,278	4,275	4,139	4,026	-2.7%	0.3%
24	Virginia	18,942	15,052	17,169	18,125	18,286	17,945	-1.9%	1.1%
4	Washington	54,498	51,851	53,345	64,800	75,655	81,637	7.9%	5.2%
33	West Virginia	5,643	4,826	6,443	9,039	11,407	8,631	-24.3%	0.5%
19	Wisconsin	20,570	16,725	19,800	22,069	23,119	23,109	0.0%	1.5%
50	Wyoming	1,081	926	983	1,219	1,421	1,336	-6.0%	0.1%
	United States	1,287,442	1,056,043	1,278,495	1,482,508	1,545,703	1,579,593	2.2%	100.0%

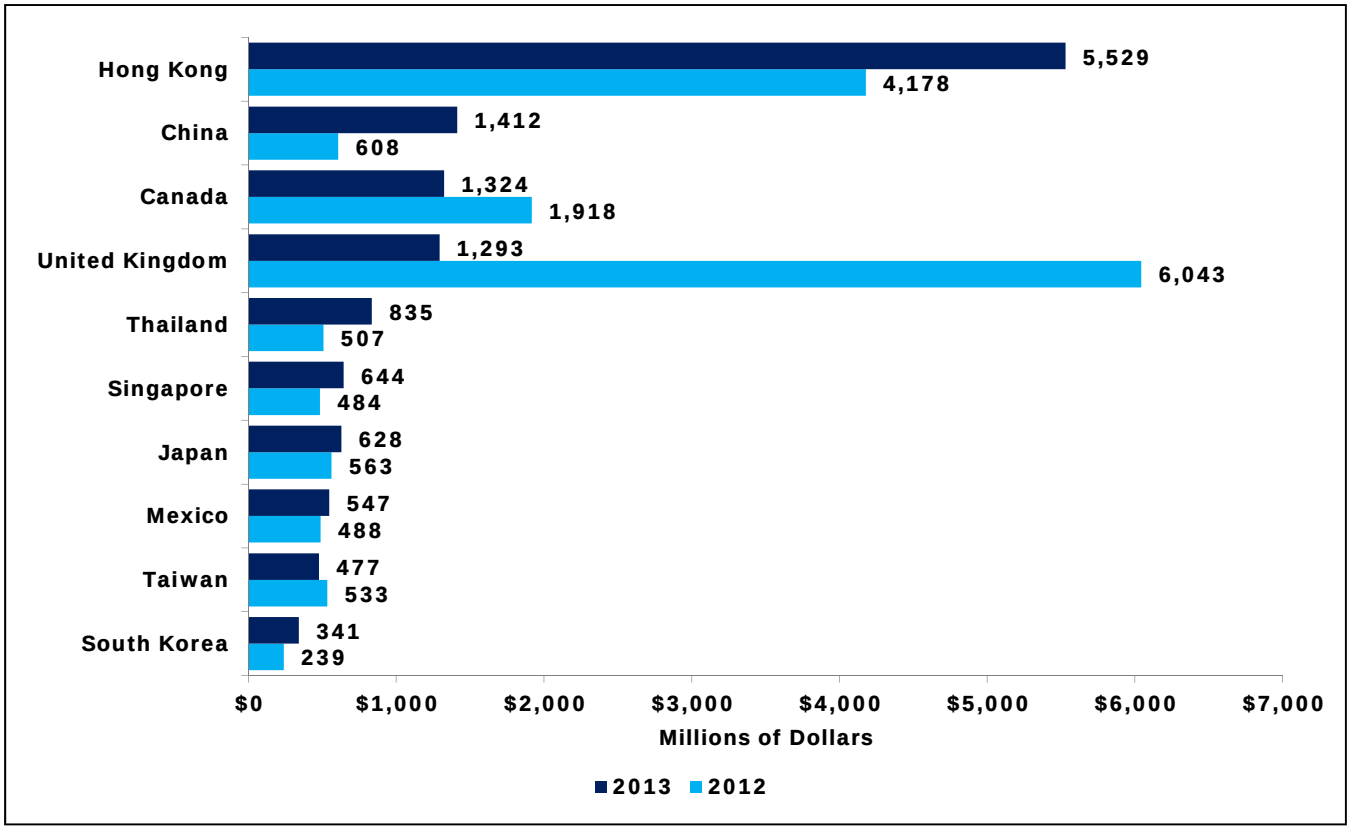
Source: U.S. Census Bureau, Foreign Trade

Figure 10.4
Utah Merchandise Exports by Industry

Industry			Millions of Dollars						2012-2013 Percent	2013
Rank	Code	Name	2008	2009	2010	2011	2012	2013	Change	Share
14	111	Agricultural Products	30.3	54.7	23.1	30.5	71.5	61.5	-14.0%	0.4%
27	112	Livestock and Livestock Products	0.9	4.0	7.9	6.8	4.1	6.9	65.8%	0.0%
29	113	Forestry Products	1.2	0.9	0.6	2.0	0.8	1.7	102.2%	0.0%
30	114	Fish and Marine Products	2.7	2.6	1.3	0.8	1.2	1.5	20.2%	0.0%
16	211	Oil and Gas	0.8	1.1	1.2	0.7	0.7	47.9	7207.6%	0.3%
10	212	Minerals	577.3	236.5	374.0	457.8	265.6	172.8	-34.9%	1.1%
3	311	Food	512.9	513.9	603.2	652.9	817.5	955.5	16.9%	5.9%
20	312	Beverages	28.0	50.4	40.8	23.8	16.5	20.1	21.4%	0.1%
25	313	Raw Textiles	6.0	5.8	21.6	12.7	9.8	12.0	22.6%	0.1%
21	314	Milled Textiles	15.7	16.2	11.8	11.8	17.6	19.5	10.8%	0.1%
26	315	Apparel	5.4	5.9	10.5	9.3	11.3	10.8	-4.5%	0.1%
22	316	Leather	10.3	8.3	8.0	12.9	16.7	18.3	9.7%	0.1%
28	321	Wood Products	9.0	4.3	4.3	3.1	9.4	3.4	-63.7%	0.0%
15	322	Paper	62.4	47.0	43.5	40.8	53.2	52.3	-1.7%	0.3%
19	323	Printed Material	29.7	29.7	20.5	17.1	21.3	23.0	7.9%	0.1%
24	324	Petroleum and Coal	7.1	3.6	4.6	13.3	39.3	13.1	-66.8%	0.1%
4	325	Chemicals	496.5	522.1	706.7	745.9	799.0	830.8	4.0%	5.2%
12	326	Plastics	96.4	81.7	108.5	148.3	155.3	160.6	3.4%	1.0%
18	327	Nonmetallic Minerals	24.9	22.5	26.6	23.4	32.0	29.0	-9.5%	0.2%
1	331	Primary Metals	4,240.4	5,466.2	7,621.5	12,112.1	12,178.9	8,318.3	-31.7%	51.6%
9	332	Fabricated Metals	167.6	168.0	209.6	220.6	219.7	236.5	7.6%	1.5%
7	333	Machinery	354.1	321.0	435.1	522.6	606.6	558.8	-7.9%	3.5%
2	334	Computers and Electronics	1,982.9	1,588.5	1,973.7	2,204.0	2,038.5	2,567.4	25.9%	15.9%
8	335	Electrical Equipment	126.9	112.5	148.9	185.4	178.6	252.0	41.1%	1.6%
5	336	Transportation Equipment	812.9	541.1	649.3	657.6	810.8	817.0	0.8%	5.1%
17	337	Furniture	55.0	38.9	30.9	36.2	34.9	32.1	-8.1%	0.2%
6	339	Miscellaneous Manufactures	427.3	358.3	431.3	459.3	505.3	561.8	11.2%	3.5%
31	511	Publications	9.3	5.9	7.9	2.6	1.2	0.6	-50.0%	0.0%
13	910	Scrap	111.6	65.0	202.5	289.8	185.6	141.0	-24.0%	0.9%
23	920	Used Merchandise	34.5	9.9	24.0	21.3	18.7	17.7	-5.6%	0.1%
11	980, 990	Unclassified	66.1	50.6	55.2	43.0	134.8	167.8	24.5%	1.0%
		Total	$10,306	$10,337	$13,808	$18,968	$19,256	$16,111	-16.3%	100.0%

Source: U.S. Census Bureau, Foreign Trade

Figure 10.5
Utah Merchandise Exports to Top Ten Purchasing Countries



Source: U.S. Census Bureau, Foreign Trade

the largest single destination for computers and electronics. China was followed closely by Canada ($1.3 billion, 8 percent of the total, with transportation equipment the largest category), and the United Kingdom ($1.3 billion, 8 percent of the total, mostly gold).

Substantial growth occurred in Utah's exports to Switzerland (up 171 percent to $269 million), China (up 132 percent), Indonesia (up 89 percent to $64 million) and Thailand (up 65 percent to $835 million). The largest contractions were observed in exports to the United Kingdom (down 79 percent), India (down 71 percent), and Australia (down 50 percent). Export diversification improved slightly, with the share of total exports to the top five destinations falling from 72 percent to 65 percent, and the share to the top 10 destinations falling from 85 percent to 81 percent between 2012 and 2013.

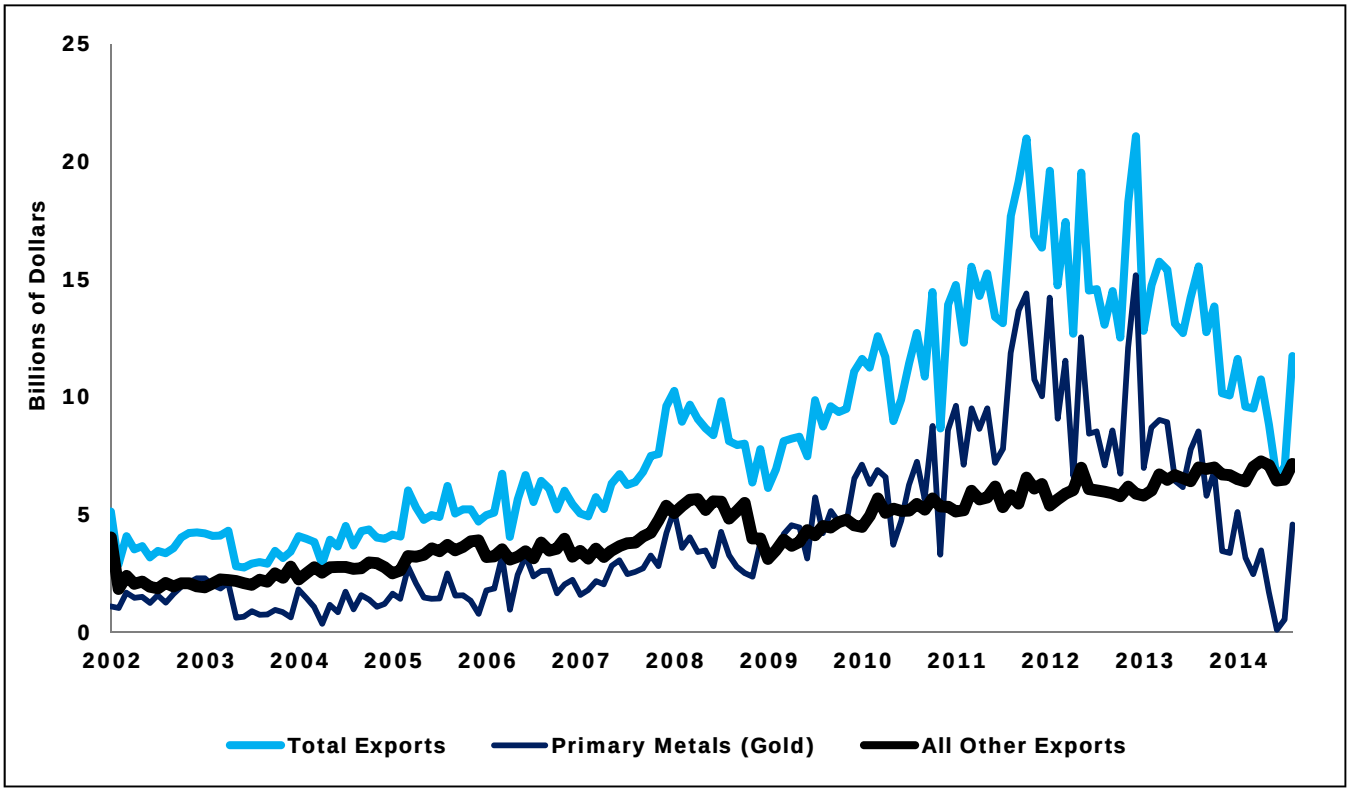
Exports to NAFTA Partners

It has now been twenty years since the North American Free Trade Agreement (NAFTA) took effect. Over the last ten years, Utah's exports to Canada and Mexico have grown by 51 percent and 348 percent, respectively. In 2013, exports to Canada fell from the previous year, by 31 percent, while those to Mexico grew by 12 percent. Nonetheless, these two markets remain important. In 2013, Canada and Mexico were the third and eighth largest export markets for Utah, respectively, similar to previous years, and together they account for 12 percent of Utah's total exports. The commodity composition of exports to both NAFTA partners is quite diverse, with Canada being a major importer of transportation equipment ($252 million), chemicals ($165 million), machinery ($143 million), and computers and electronics ($107 million), in addition to primary metals ($136 million). Major exports categories from Utah to Mexico in 2013 included transportation equipment ($168 million), food products ($79 million), machinery ($48 million), and minerals ($47 million).

The Trans-Pacific Partnership and the Tilt toward Asia

A notable trend in the regional pattern of Utah's exports is the increasing importance of East Asia. Hong Kong is now the largest single export destination for Utah, followed by China, and the top ten export destinations also include Thailand, Singapore, Japan, Taiwan, and South Korea. Moreover, other economies in the region are growing rapidly as export markets, including Indonesia and Malaysia. While traditional markets such as Canada and the United Kingdom

Figure 10.6
Utah Exports: With and Without Gold



Source: U.S. Census Bureau, Foreign Trade

remain important, over time the rapid income and import growth in Asia will mean more and more of Utah's exports will be destined for the Asia-Pacific region.

One of the more interesting developments in the region is the proposed Trans-Pacific Partnership (TPP). Current TPP member countries together account for 40 percent of global GDP and over one third of global trade. Moreover, China has expressed interest in joining. The agreement, which is currently being negotiated, would help open markets for Utah's exports in 11 partner economies, including Japan, Singapore and Malaysia. In 2013, $3.5 billion of Utah's exports were to TPP member economies, roughly double what they were a decade ago, and representing 22 percent of the total.

Outlook

Fluctuations in the value of Utah's total export values are driven largely by changes in the world market price of gold. After a precipitous drop in 2012-2013, gold prices have stabilized, and we expect to see steady gold exports in 2014. The contribution of non-gold exports will continue to grow as export markets, particularly in the Asia-Pacific region, continue to exhibit strong growth.

Figure 10.7
Utah Merchandise Exports by Purchasing Country and Region

Rank	Country	Millions of Dollars 2008	2009	2010	2011	2012	2013	2012-2013 Percent Change	2013 Share
1	Hong Kong	$133.4	$153.4	$947.4	$3,702.7	$4,177.8	$5,529.2	32.3%	34.3%
2	China	527.0	542.3	577.6	523.9	607.6	1,411.9	132.4%	8.8%
3	Canada	1,082.8	1,019.4	1,264.8	1,375.1	1,917.7	1,323.7	-31.0%	8.2%
4	United Kingdom	3,516.1	4,364.1	4,407.9	6,715.5	6,042.6	1,293.2	-78.6%	8.0%
5	Thailand	163.1	46.6	172.3	707.6	507.3	835.3	64.7%	5.2%
6	Singapore	373.2	253.3	524.5	570.7	484.0	644.4	33.1%	4.0%
7	Japan	375.9	342.2	406.1	408.8	563.0	628.2	11.6%	3.9%
8	Mexico	241.9	279.4	456.1	515.8	487.7	546.9	12.1%	3.4%
9	Taiwan	727.6	567.9	550.9	696.7	533.0	476.6	-10.6%	3.0%
10	South Korea	201.5	294.5	273.0	222.8	238.5	341.1	43.0%	2.1%
11	India	496.8	649.5	1,124.7	565.9	1,056.3	311.3	-70.5%	1.9%
12	Switzerland	64.3	94.8	718.6	102.4	99.2	268.5	170.5%	1.7%
13	Netherlands	175.7	92.7	110.3	125.1	164.6	254.5	54.6%	1.6%
14	Germany	234.0	165.9	226.4	283.5	294.2	228.3	-22.4%	1.4%
15	Italy	72.7	73.3	148.4	166.4	141.5	168.1	18.8%	1.0%
16	Australia	183.9	182.8	220.5	513.1	323.9	161.5	-50.2%	1.0%
17	Philippines	144.2	106.5	145.1	130.0	132.4	155.5	17.5%	1.0%
18	Belgium	543.4	208.7	290.1	271.0	221.5	141.3	-36.2%	0.9%
19	Brazil	100.5	99.8	78.1	101.2	98.3	117.5	19.5%	0.7%
20	France	86.5	77.8	109.1	136.8	104.2	109.0	4.7%	0.7%
21	Malaysia	51.8	69.4	152.0	93.9	83.5	102.7	23.0%	0.6%
22	Indonesia	10.2	12.7	16.2	22.0	33.7	63.7	89.0%	0.4%
23	Chile	30.1	23.1	31.0	138.0	46.6	61.3	31.4%	0.4%
24	Israel	80.3	45.5	58.8	53.9	50.0	56.1	12.1%	0.3%
25	Saudi Arabia	17.9	26.4	13.8	18.6	31.4	51.0	62.4%	0.3%
26	United Arab Emirates	99.3	63.7	128.3	44.3	50.5	46.9	-7.0%	0.3%
27	Spain	48.8	44.7	55.6	62.5	35.3	45.7	29.6%	0.3%
28	Sweden	38.1	34.3	44.3	41.4	67.2	43.1	-35.8%	0.3%
29	Russian Federation	39.7	23.8	40.0	22.5	36.6	40.7	11.1%	0.3%
30	Ireland	19.0	21.2	14.8	22.7	25.5	38.3	50.0%	0.2%
31	Turkey	38.6	18.2	60.9	126.9	40.4	35.1	-13.2%	0.2%
32	Costa Rica	18.6	24.8	17.1	17.9	26.0	34.3	31.7%	0.2%
33	South Africa	15.2	14.4	18.8	48.9	34.4	28.3	-17.6%	0.2%
34	Czech Republic	5.6	3.2	3.3	15.7	32.2	27.2	-15.5%	0.2%
35	Peru	12.9	12.0	22.1	16.1	33.7	25.1	-25.5%	0.2%
	World	10,306.0	10,337.1	13,808.5	18,968.3	19,256.2	16,111.4	-16.3%	100.0%

Source: U.S. Census Bureau, Foreign Trade

Figure 10.9
Utah Merchandise Exports to Top Ten Purchasing Countries by Industry: 2013

		Millions of Dollars										
Code	Industry Name	Hong Kong	China	Canada	United Kingdom	Thailand	Singapore	Japan	Mexico	Taiwan	South Korea	10-Country Industry Total
111	Agricultural Products	$0.5	$36.4	$1.6	$0.4	$0.0	$0.2	$5.9	$1.8	$0.8	$1.2	$48.8
112	Livestock and Livestock Products	$0.1	$1.0	$0.6	$0.0	$0.0	$0.0	$0.0	$1.9	$0.0	$0.0	$3.6
113	Forestry Products	$0.0	$0.0	$0.4	$0.0	$0.0	$0.0	$0.0	$0.0	$0.5	$0.0	$1.1
114	Fish and Marine Products	$0.0	$0.0	$0.0	$0.1	$0.0	$0.0	$0.0	$0.0	$0.5	$0.1	$0.8
211	Oil and Gas	$0.0	$0.0	$38.1	$0.0	$0.0	$0.0	$0.0	$9.9	$0.0	$0.0	$47.9
212	Minerals	$4.8	$1.4	$9.8	$0.6	$0.4	$0.3	$3.2	$47.1	$0.1	$1.1	$68.8
311	Food	$88.4	$51.8	$85.0	$5.7	$37.1	$44.4	$138.0	$78.5	$41.5	$66.0	$636.3
312	Beverages	$0.2	$0.0	$8.7	$0.5	$0.0	$0.2	$3.6	$0.0	$0.8	$0.1	$14.1
313	Raw Textiles	$0.1	$0.8	$2.6	$0.5	$0.0	$0.0	$0.1	$2.5	$0.0	$0.0	$6.7
314	Milled Textiles	$0.1	$0.1	$13.9	$0.3	$0.0	$0.0	$0.6	$1.0	$0.1	$0.2	$16.5
315	Apparel	$0.1	$0.2	$2.6	$0.3	$0.0	$0.0	$1.1	$1.5	$0.1	$0.2	$6.2
316	Leather	$0.7	$2.8	$6.8	$0.3	$0.0	$0.2	$3.1	$0.5	$0.0	$0.7	$15.3
321	Wood Products	$0.0	$0.0	$1.8	$0.2	$0.0	$0.0	$0.2	$0.1	$0.0	$0.3	$2.5
322	Paper	$0.8	$4.9	$14.9	$5.7	$0.0	$2.7	$1.4	$3.5	$0.5	$0.8	$35.2
323	Printed Material	$0.4	$0.3	$3.7	$1.0	$0.1	$0.7	$1.3	$2.5	$0.3	$0.1	$10.5
324	Petroleum and Coal	$0.0	$0.1	$10.2	$0.4	$0.0	$0.0	$0.1	$0.2	$0.0	$0.2	$11.1
325	Chemicals	$33.1	$27.5	$164.7	$21.2	$12.2	$5.5	$85.7	$38.1	$28.8	$124.0	$540.9
326	Plastics	$0.5	$8.3	$64.3	$6.1	$0.4	$2.5	$5.6	$16.8	$1.2	$3.0	$108.8
327	Nonmetallic Minerals	$0.1	$1.3	$16.1	$0.7	$0.0	$0.2	$0.7	$1.9	$0.0	$0.3	$21.3
331	Primary Metals	$5,323.3	$324.2	$135.5	$1,139.3	$770.1	$34.4	$6.8	$21.0	$0.0	$32.0	$7,786.6
332	Fabricated Metals	$0.3	$24.6	$98.0	$5.5	$0.2	$5.3	$3.4	$14.3	$0.2	$1.4	$153.0
333	Machinery	$11.7	$49.2	$143.3	$16.1	$3.0	$6.3	$15.9	$47.8	$10.5	$12.4	$316.2
334	Computers and Electronics	$27.0	$722.8	$106.6	$30.5	$2.8	$501.0	$225.2	$31.6	$380.5	$47.0	$2,075.0
335	Electrical Equipment	$4.3	$14.3	$49.9	$18.1	$1.2	$1.9	$5.3	$16.8	$1.2	$1.7	$114.6
336	Transportation Equipment	$4.3	$27.0	$251.9	$14.9	$3.1	$4.3	$37.1	$168.4	$2.3	$23.0	$536.4
337	Furniture	$0.0	$0.1	$11.5	$0.4	$0.0	$0.1	$0.2	$10.9	$0.1	$0.0	$23.3
339	Miscellaneous Manufactures	$11.4	$24.8	$68.6	$15.7	$3.9	$16.2	$78.2	$19.1	$2.5	$16.3	$256.6
511	Publications	$0.0	$0.0	$0.3	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.4
910	Scrap	$1.6	$50.9	$5.4	$0.0	$0.4	$0.2	$0.3	$4.0	$3.4	$2.0	$68.3
920	Used Merchandise	$0.8	$0.0	$2.8	$0.4	$0.1	$4.0	$0.1	$0.6	$0.0	$0.0	$8.9
990	Unclassified	$14.5	$36.7	$4.0	$8.2	$0.1	$14.1	$5.0	$4.6	$0.4	$7.0	$94.6
	Total	$5,529.2	$1,411.9	$1,323.7	$1,293.2	$835.3	$644.4	$628.2	$546.9	$476.6	$341.1	$13,030.4

Source: U.S. Census Bureau, Foreign Trade

Price Inflation and Cost of Living

A moderate amount of inflation, which is approximately 2-3 percent according to the Federal Reserve, is considered to be good for the economy as it generally signals that businesses are confident enough in consumer spending to raise prices. However, too much or too little inflation can cause havoc on the economy and the labor market. The best measure of inflation is the U.S. Consumer Price Index (CPI). The CPI measures price changes for a fixed basket of goods and services over time, and it is administered by the U.S. Bureau of Labor Statistics. Likewise, Utah-specific CPI data for the Wasatch Front is published by Zions Bank each month.

Regional Price Parities (RPPs) help determine cost of living and measure the differences in the price levels of goods and services across states and metropolitan areas for a given year. RPPs are expressed as a percentage of the overall national price level for each year, which is equal to 100.0. The most recent RPP data, published in 2014, contains data for 2008-2012.

Utah's cost of living is below the national average. Inflation rates over the past several years have remained well below historical levels, primarily due to the weak global markets and downturn in the labor market that began in 2008. Economic conditions have greatly improved over the past two years, but there are still several factors that will likely keep inflation in check.

2014 Summary

National Consumer Price Index

The CPI increased by 1.5 percent in 2013, measured on an annual average basis, compared to an increase of 2.1 percent in 2012. The CPI increased 1.7 percent during the first half of 2014 and was being driven higher by increasing food and housing prices. Many analysts predicted much higher inflation for 2014 due to rising food prices, an improved housing market, an improved labor market, and a continuation of quantitative easing by the Federal Reserve. However, these factors have not coalesced to accelerate inflation as anticipated due to a weaker global economic outlook and a reduced money supply from stricter-than-anticipated lending practices by banks.

The Zions Bank Wasatch Front CPI increased 1.9 percent in 2013, measured on an annual average basis, compared to an increase of 3.0 percent in 2012. Price inflation along the Wasatch Front for the first half of 2014 was slightly lower than the national average at 1.6 percent.

Regional Price Parities

Cost of living is determined by comparing income to expenditures. Spatial price indexes measure price level differences across regions for a specified time period. An example of these types of indexes are purchasing power parities (PPPs), which measure differences in price levels across countries for a given period. The Bureau of Economic Analysis (BEA) has developed regional price parities (RPPs) that compare regions within the United States. The RPPs are calculated using data from several sources, including prices from the U.S. CPI, and expenditure data from the BLS' Consumer Expenditure Survey and the BEA's Personal Consumption Expenditures (PCE).

Utah's RPP in 2012 was 96.8, meaning the cost of living was 3.2 points below the national average. Total real personal income for 2012 was just over $98.7 billion, which represents a 3.3 percent increase from 2011. Real per capita personal income was $34,580, an increase of 1.8 percent from the year before. The national average of real per capita personal income in 2012 was $41,282.

Significant Issues

Federal Reserve

With the improving economy and strengthening labor market, the Federal Reserve ended its bond-buying campaign, known as quantitative easing, in late 2014. Some analysts feared this program would cause rapid inflation due to lower interest rates and increased money supply, but that did not occur. In addition to ending quantitative easing due to a strengthening economy, the Fed is also considering raising short-term interest rates, which are currently very near to zero, in the coming years. In general, rising interest rates put downward pressure on price inflation, meaning that the Fed's recent moves likely will keep inflationary pressures in check.

Gasoline and Energy

After seeing gasoline prices rise in recent years, analysts do not expect prices to increase in the coming years and inflation should be minimal. The U.S. Energy Information Administration predicts that the average price per gallon of gasoline will decrease from $3.51 in 2013 to $3.45 in 2014 and $3.38 in 2015 primarily due to higher global oil production and relatively slack global demand. With regard to energy prices and household utilities, prices should remain relatively flat in the coming years due to slightly higher electricity prices being offset by flat or declining natural gas and heating oil prices. In general, expenditures for gasoline and energy consume about 10 percent of a family's outlays.

Housing

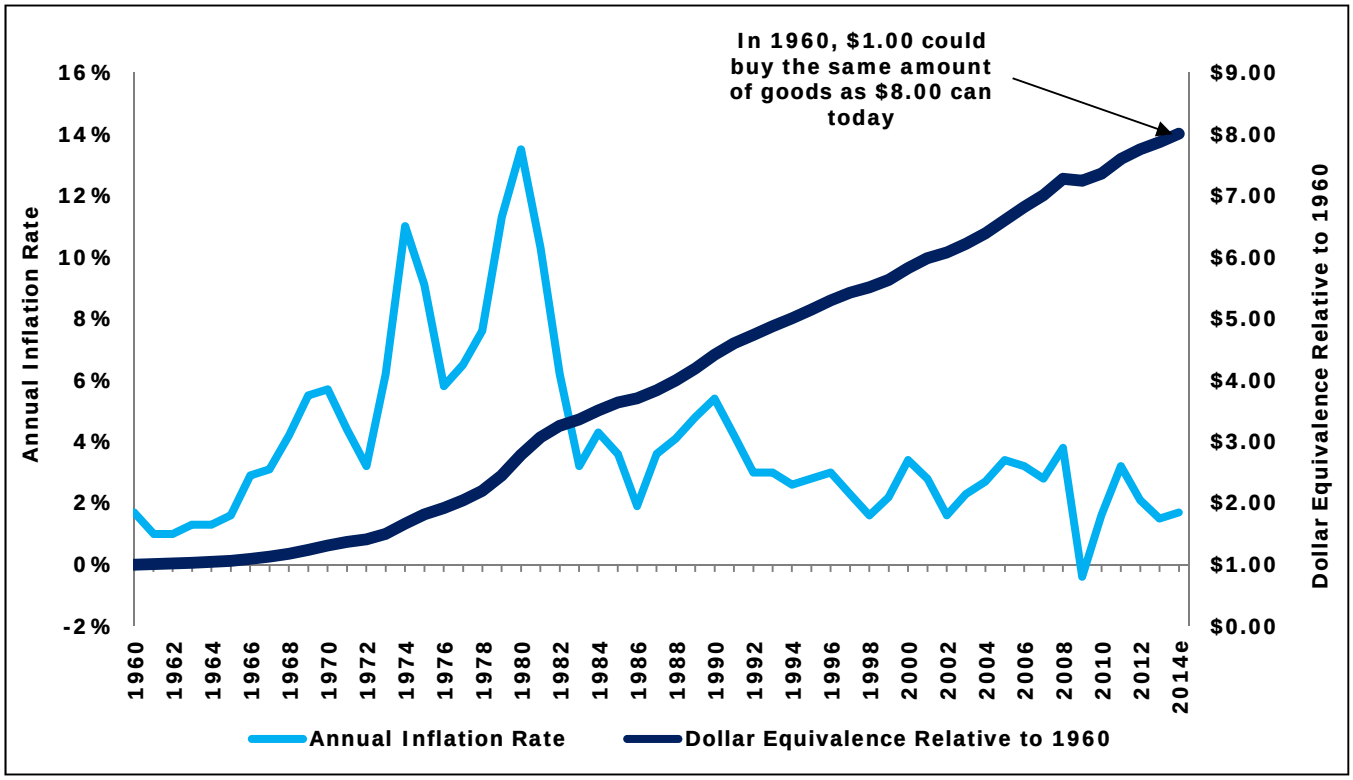
After years of holding back inflation rates due to decreased demand and excess supply, the housing market is finally boosting the rate of inflation. The housing component of the CPI, which is the largest component of the CPI, increased 2.1 percent nationally in 2013, up from 1.6 percent in 2012. More specifically, rental prices in the United States have increased 2.2 percent in 2013 and are 2.6 percent higher through the first half of 2014. Analysts expect continued upward pressure on rental prices through 2015.

Food
Representing about 14 percent of total household expenditures, food prices were relatively subdued in 2013, increasing only 1.4 percent nationally. Food-at-home prices (food purchased at a grocery store or supermarket) saw a very modest increase of 0.9 percent, much lower than the historical annual average of 2.6 percent, while food-away-from-home increased 2.2 percent in 2013. The USDA expects food price inflation to move closer to its historical norm in both 2014 and 2015, particularly due to drought conditions in various parts of the U.S. through the first half of 2014, food prices in the U.S. have increased 1.6 percent.

The Dollar
In 2014, the U.S. dollar has steadily gained strength relative to other major currencies. A stronger dollar generally means goods imported into the U.S. (such as oil and other commodities) become cheaper, reducing inflation. Many economists predict the U.S. dollar will continue to be strong relative to other currencies as the U.S. economy continues to outperform other major global economies.

2015 Outlook
Cost of living in Utah is low in comparison to other regions in the United States. Inflation has remained relatively subdued in 2013 and 2014 when compared to historical averages. In the coming years, the improving economy will likely cause inflation to reach more normal levels around 2-3 percent; however, due to the Fed's recent policy changes, consumers should expect inflation to remain at or below 2 percent through 2015, pending any unforeseen changes in economic conditions.

Figure 11.1
Consumer Price Index (CPI) Year-over-Year Price Change and Relative Value of a Dollar



Sources: U.S. Bureau of Economic Analysis and U.S. Bureau of Labor Statistics

Figure 11.2
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 Percent Change
1959	29.0	28.9	28.9	29.0	29.0	29.1	29.2	29.2	29.3	29.4	29.4	29.4	29.1	-
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	1.7%
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	1.0%
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	30.2	1.0%
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	1.3%
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	32.4	2.9%
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	3.1%
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	4.2%
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	5.7%
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	4.4%
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	3.2%
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	11.0%
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	5.8%
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	6.2%
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	3.6%
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	3.6%
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	3.0%
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	2.8%
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	-	-	-	-

Source: U.S. Bureau of Labor Statistics

Figure 11.3
Regional Price Parities by State: 2012

	Regional Price Parities			
			Services	
	All Items	Goods	Rents	Other
Alabama	88.1	96.7	64.3	93.1
Alaska	107.1	103.0	142.1	99.6
Arizona	98.1	100.6	93.6	98.0
Arkansas	87.6	95.6	63.0	92.4
California	112.9	103.1	147.4	105.6
Colorado	101.6	101.7	106.5	98.8
Connecticut	109.4	104.9	118.9	109.5
Delaware	102.3	102.3	98.9	104.4
District of Columbia	118.2	107.0	157.2	112.0
Florida	98.8	98.3	104.8	95.9
Georgia	92.0	97.1	79.8	93.8
Hawaii	117.2	107.5	159.0	104.2
Idaho	93.6	98.7	78.8	96.7
Illinois	100.6	101.4	100.5	99.7
Indiana	91.1	96.6	75.8	93.9
Iowa	89.5	93.7	74.8	91.3
Kansas	89.9	94.7	75.0	91.7
Kentucky	88.8	95.3	68.1	92.5
Louisiana	91.4	96.9	77.4	93.2
Maine	98.3	98.6	99.5	97.5
Maryland	111.3	103.4	125.1	111.0
Massachusetts	107.2	98.0	121.4	110.9
Michigan	94.4	97.7	82.4	97.2
Minnesota	97.5	98.5	95.7	97.2
Mississippi	86.4	95.1	62.1	92.0
Missouri	88.1	92.8	74.1	90.5
Montana	94.2	99.2	80.3	95.6
Nebraska	90.1	94.5	76.2	91.9
Nevada	98.2	97.4	98.8	98.9
New Hampshire	106.2	98.1	123.4	107.3
New Jersey	114.1	101.4	136.8	115.5
New Mexico	94.8	97.9	83.2	98.1
New York	115.4	108.1	134.9	113.2
North Carolina	91.6	96.7	79.1	93.1
North Dakota	90.4	93.5	79.3	91.1
Ohio	89.2	95.1	73.9	91.9
Oklahoma	89.9	96.2	70.3	92.8
Oregon	98.8	98.3	99.1	99.3
Pennsylvania	98.7	100.0	89.8	102.1
Rhode Island	98.7	98.4	101.6	97.3
South Carolina	90.7	96.9	76.3	93.3
South Dakota	88.2	93.2	70.8	90.8
Tennessee	90.7	96.6	75.5	93.1
Texas	96.5	97.9	89.3	99.0
Utah	96.8	97.7	92.1	98.4
Vermont	100.9	98.6	116.6	97.1
Virginia	103.2	100.2	114.6	100.8
Washington	103.2	103.1	111.0	99.9
West Virginia	88.6	95.7	63.3	93.6
Wisconsin	92.9	95.7	87.6	92.1
Wyoming	96.4	99.0	90.6	95.9
All States	100.0	99.4	101.2	100.0

Source: U.S. Bureau of Economic Analysis

Regional/National Comparison

The strengths and weakness of Utah's economy in relation to its neighbors and the rest of the United States can be found using a variety of measures and provide insights as to how the state is performing. Population growth can be viewed as an economic driver that affects the gross domestic product. Household size affects total personal income as well as median household and median family income.

2014 Summary

Utah's strong economy is often in the local news due to favorable comparisons with other cities across the nation. Utah was the "Best State for Business" in 2014 according to Forbes Magazine. Furthermore, Provo and Salt Lake City were ranked second and fifth, respectively, in the nation for being the best performing cities in 2013 according to the Milken Institute.

Population growth is one driver of the state's economy. Utah ranks third for gross domestic product growth, nearly twice the national average. In terms of median household income, Utah ranks 13th in the nation, but only 22nd for median family income. This discrepancy is explained by Utah's high number of workers per household and few single person households. Utah's employment growth was twice that of population growth in 2010, attesting to the fact that Utahns are now re-entering the labor force since having exited it due to the Great Recession. Finally, Utah moved to second place for unemployment and claims a relatively low poverty rate.

Significant Issues

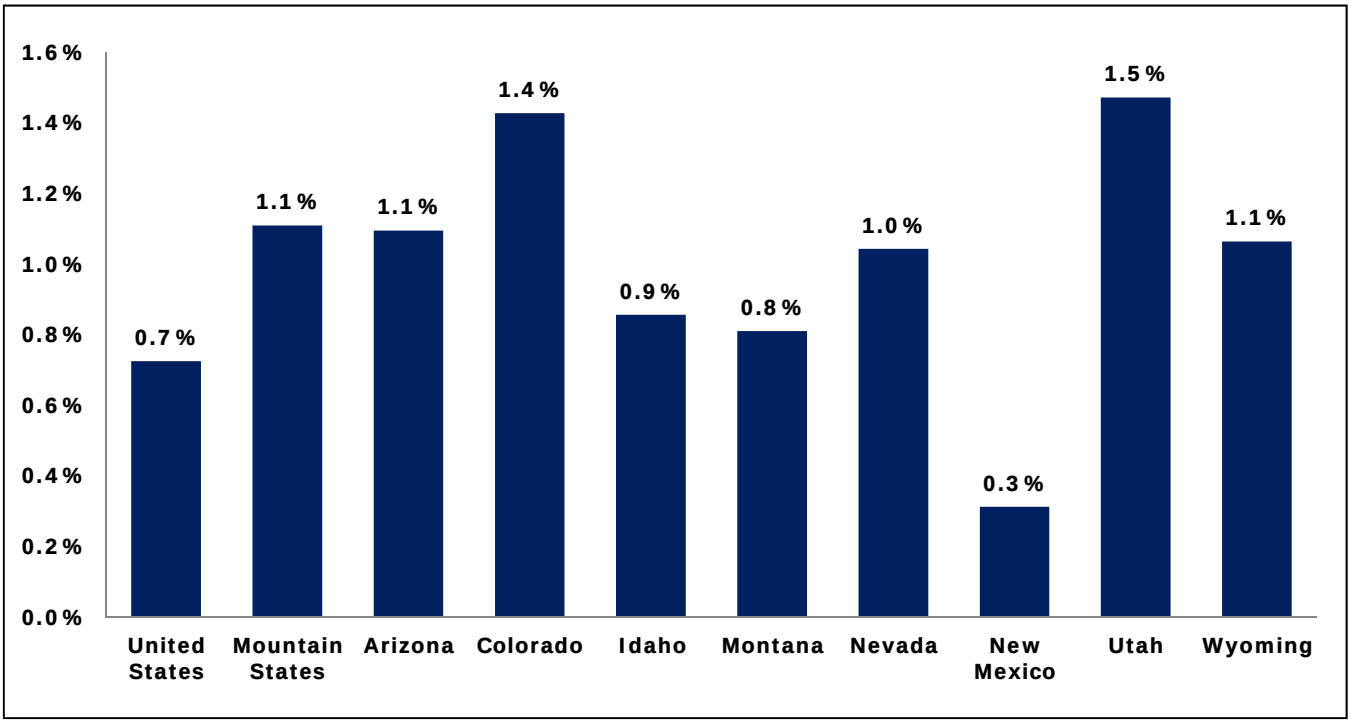
Population and Households

Utah continues to be one of the fastest growing states in the nation. While Utah only ranks 33rd for total population (2,900,872), it ranks fourth for population growth from 2010-2013, with an average annual rate of 1.5 percent. Utah's population growth rate is significantly higher than both the United States average (0.7 percent) and the Mountain States region average (1.1 percent). This growth can be attributed to Utah's high birth rate and migration into the state. Utah also continues to have the largest household size in the nation (3.2 persons per household), which is significantly higher than the United States (2.7) and the Mountain States region (2.8).

Gross Domestic Product and Total Personal Income

Utah's total real gross domestic product (GDP) measured just over $131 billion for 2013. Utah ranks third in the nation and first in the Intermountain West for average annual GDP growth between 2010 and 2013 with a rate of 3.9 percent; the United States average was 2.0 percent and Mountain States regional average was 2.4 percent. Utah's high growth rate signifies its thriving economy with growing economic activity. Per capita GDP measured $45,165 in 2013. Utah's per capita

Figure 12.1
Three-Year Average Annual Population Growth Rate: 2011-2013



Source: U.S. Census Bureau

Figure 12.2
Population and Households

Division/State	July 1 Population Estimate 2010	2011	2012	2013	2013 Rank	Three-Year Avg. Annual Growth Rate	Rank	Households 2013	Persons per Household 2013	Rank
United States	309,326,295	311,582,564	313,873,685	316,128,839	-	0.7%	-	116,291,033	2.58	-
Mountain States	22,125,089	22,346,709	22,611,082	22,881,245		1.1%		8,277,942		
Arizona	6,408,790	6,468,796	6,551,149	6,626,624	15	1.1%	8	2,400,809	2.63	9
Colorado	5,048,196	5,118,400	5,189,458	5,268,367	22	1.4%	5	2,002,800	2.49	22
Idaho	1,570,718	1,583,930	1,595,590	1,612,136	39	0.9%	20	588,489	2.66	6
Montana	990,527	997,600	1,005,494	1,015,165	44	0.8%	21	406,288	2.35	47
Nevada	2,703,230	2,717,951	2,754,354	2,790,136	35	1.1%	11	1,002,571	2.65	7
New Mexico	2,064,982	2,077,919	2,083,540	2,085,287	36	0.3%	38	753,507	2.55	15
Utah	**2,774,424**	**2,814,784**	**2,854,871**	**2,900,872**	**33**	**1.5%**	**4**	**899,475**	**3.10**	**1**
Wyoming	564,222	567,329	576,626	582,658	51	1.1%	10	224,003	2.42	43
Other States										
Alabama	4,785,570	4,801,627	4,817,528	4,833,722	23	0.3%	37	1,822,439	2.48	27
Alaska	713,868	723,375	730,307	735,132	47	1.0%	14	246,015	2.65	7
Arkansas	2,922,280	2,938,506	2,949,828	2,959,373	32	0.4%	32	1,125,899	2.47	33
California	37,333,601	37,668,681	37,999,878	38,332,521	1	0.9%	19	12,650,592	2.90	2
Connecticut	3,579,210	3,588,948	3,591,765	3,596,080	29	0.2%	44	1,339,860	2.52	19
Delaware	899,711	907,985	917,053	925,749	45	1.0%	17	339,071	2.55	15
District of Columbia	605,125	619,624	633,427	646,449	49	2.2%	2	271,651	2.11	51
Florida	18,846,054	19,083,482	19,320,749	19,552,860	4	1.2%	6	7,211,584	2.48	27
Georgia	9,713,248	9,810,181	9,915,646	9,992,167	8	0.9%	18	3,546,965	2.63	9
Hawaii	1,363,731	1,376,897	1,390,090	1,404,054	40	1.0%	15	450,120	2.89	3
Illinois	12,839,695	12,855,970	12,868,192	12,882,135	5	0.1%	45	4,783,421	2.59	12
Indiana	6,489,965	6,516,336	6,537,782	6,570,902	16	0.4%	33	2,498,395	2.52	19
Iowa	3,050,314	3,064,102	3,075,039	3,090,416	30	0.4%	30	1,236,209	2.41	45
Kansas	2,858,910	2,869,548	2,885,398	2,893,957	34	0.4%	34	1,113,729	2.49	22
Kentucky	4,347,698	4,366,869	4,379,730	4,395,295	26	0.4%	36	1,705,623	2.45	37
Louisiana	4,545,392	4,575,197	4,602,134	4,625,470	25	0.6%	29	1,728,149	2.55	15
Maine	1,327,366	1,327,844	1,328,501	1,328,302	41	0.0%	49	547,686	2.32	49
Maryland	5,787,193	5,840,241	5,884,868	5,928,814	19	0.8%	22	2,161,680	2.61	11
Massachusetts	6,563,263	6,606,285	6,645,303	6,692,824	14	0.7%	28	2,536,321	2.48	27
Michigan	9,876,149	9,874,589	9,882,519	9,895,622	9	0.1%	47	3,832,466	2.49	22
Minnesota	5,310,337	5,347,108	5,379,646	5,420,380	21	0.7%	27	2,119,954	2.48	27
Mississippi	2,970,047	2,977,886	2,986,450	2,991,207	31	0.2%	41	1,091,002	2.58	13
Missouri	5,996,063	6,010,065	6,024,522	6,044,171	18	0.3%	40	2,362,853	2.45	37
Nebraska	1,829,838	1,841,749	1,855,350	1,868,516	37	0.7%	26	730,579	2.46	35
New Hampshire	1,316,614	1,318,075	1,321,617	1,323,459	42	0.2%	42	519,246	2.46	35
New Jersey	8,802,707	8,836,639	8,867,749	8,899,339	11	0.4%	35	3,176,139	2.68	5
New York	19,398,228	19,502,728	19,576,125	19,651,127	3	0.4%	31	7,219,356	2.57	14
North Carolina	9,559,533	9,651,377	9,748,364	9,848,060	10	1.0%	12	3,757,480	2.48	27
North Dakota	674,344	684,867	701,345	723,393	48	2.4%	1	298,298	2.30	50
Ohio	11,545,435	11,549,772	11,553,031	11,570,808	7	0.1%	46	4,564,745	2.44	40
Oklahoma	3,759,263	3,785,534	3,815,780	3,850,568	28	0.8%	23	1,447,277	2.49	22
Oregon	3,837,208	3,867,937	3,899,801	3,930,065	27	0.8%	24	1,523,799	2.47	33
Pennsylvania	12,710,472	12,741,310	12,764,475	12,773,801	6	0.2%	43	4,938,894	2.45	37
Rhode Island	1,052,669	1,050,350	1,050,304	1,051,511	43	0.0%	51	406,366	2.44	40
South Carolina	4,636,361	4,673,509	4,723,417	4,774,839	24	1.0%	13	1,794,989	2.49	22
South Dakota	816,211	823,772	834,047	844,877	46	1.2%	7	331,406	2.42	43
Tennessee	6,356,683	6,398,361	6,454,914	6,495,978	17	0.7%	25	2,490,249	2.48	27
Texas	25,245,178	25,640,909	26,060,796	26,448,193	2	1.6%	3	9,110,853	2.75	4
Vermont	625,793	626,320	625,953	626,630	50	0.0%	48	253,234	2.34	48
Virginia	8,024,417	8,105,850	8,186,628	8,260,405	12	1.0%	16	3,055,863	2.54	18
Washington	6,742,256	6,821,481	6,895,318	6,971,406	13	1.1%	9	2,644,557	2.51	21
West Virginia	1,854,146	1,855,184	1,856,680	1,854,304	38	0.0%	50	738,653	2.36	46
Wisconsin	5,689,060	5,708,785	5,724,554	5,742,713	20	0.3%	39	2,289,424	2.43	42

Note: The three-year average annual growth rate is the average growth for each of the three years, not simply the change between 2010 and 2013.

Source: U.S. Census Bureau, Population Estimates and U.S. Census Bureau, American Community Survey

GDP is lower than the United States ($49,115); its low per capita GDP is at least partially attributable to Utah's larger households and high proportion of children.

Another measure of the health of the economy is personal income. This is a subset of GDP, which measures the amount of funds available to individuals. Utah's total personal income measured over $106 million in 2013.

Income and Earnings

Per capita personal income is the average of the income available to individuals. A better measure for evaluating the income of a typical Utahn is median income. Median is the middle number, thus removing the extreme variables at the top end of the income spectrum. In addition to Utah's large proportion of children, Utah's relatively low per capita income is also due to Utah's lower level of income inequality due to Utah having relatively few "super-rich" individuals.

Utah ranks relatively high for median household income; the state's three-year average was $59,877, placing it as 13th highest in the nation and behind only Colorado ($60,727) in the Mountain States region. Utah's median household income is much higher than the United States average ($51,846). Utah ranks fourth in the nation for median household income growth at a rate of 4.7 percent, the United States grew 0.1 percent and Mountain States region grew 0.2 percent.

While household income measures the income of all workers within a household (regardless of relation), family income excludes single person households, measuring only the income of relatives within the same households. Accordingly, median family incomes are higher than median household incomes. Utah's three-year average median family income measures $66,009, with a national ranking of 22nd.

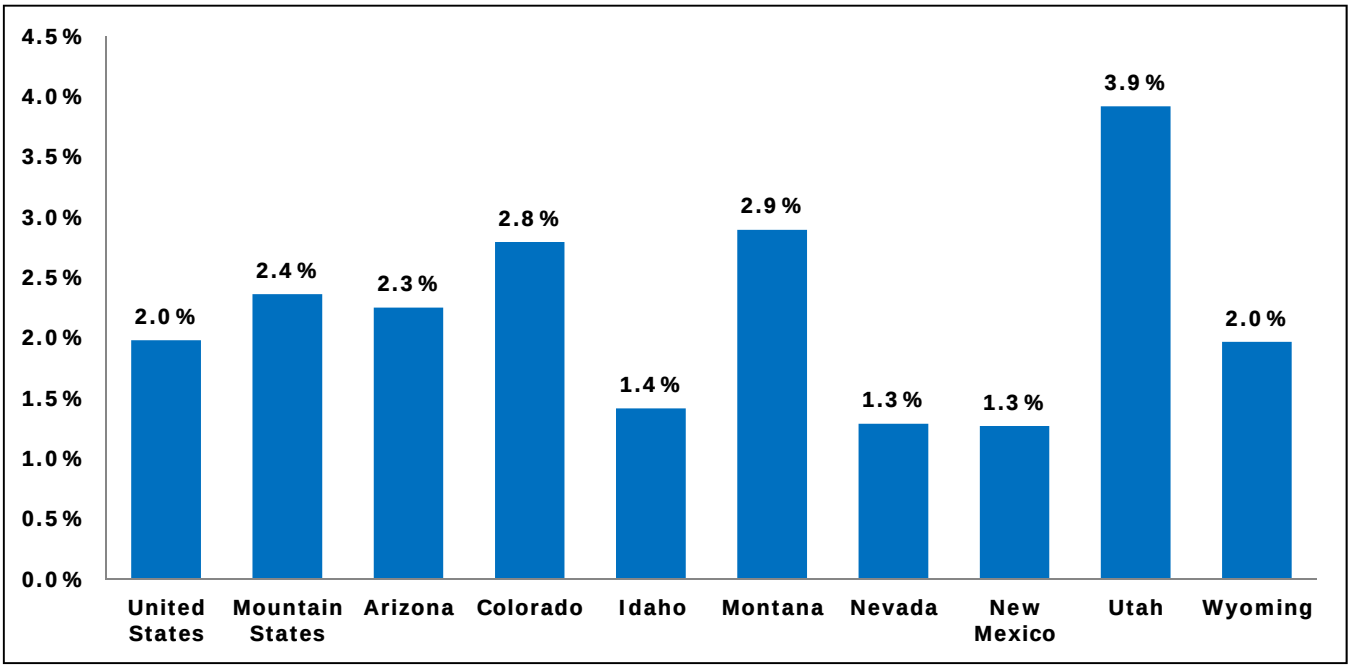
Median earnings of full-time workers have fallen in almost all states since 2010. Utah is no exception with a 0.9 percent decrease. Interestingly, only 64.9 percent of Utah's workers are full time, placing it at 48th in the nation.

Employment and Unemployment

Most analysts believe that nonfarm payroll jobs are an accurate employment indicator which closely reflects labor market conditions. In 2013, Utah employed about 1.29 million workers on nonfarm payrolls, which places Utah at 32nd in the nation (equal to Utah's population ranking). However, the average annual growth rate of employment is 2.9 percent during the period of 2010-2013, which ranks Utah as the second highest in the nation, behind only North Dakota, which is in the midst of an oil and gas boom. This growth rate is nearly two times the population growth rate (1.5 percent), indicating that people are reentering the workforce since having dropped out during the Great Recession. Utah's employment growth is significantly higher than the average in both the Mountain States region (1.9 percent) and the nation (1.6 percent).

Between 2010 and 2013 Utah progressed from a fairly average unemployment rate to a comparatively great one. In

Figure 12.3
Average Annual GDP Growth Rate: 2010-2013



Source: U.S. Bureau of Economic Analysis

Figure 12.4
Gross Domestic Product and Personal Income

	Real Gross Domestic Product (chained 2009 dollars)				Real GDP Per Capita					Personal Income (in 2013 Dollars*)		
			Avg. Annual Growth Rate					Avg. Annual Growth Rate				
Division/State	2010 (millions)	2013 (millions)	2010-13	Rank	2010	2013	Rank	2010-13	Rank	2013 (millions)	Per Capita 2013	Rank
United States	$14,639,748	$15,526,715	2.0%	-	$47,328	$49,115	-	1.2%	-	$14,151,427	$44,765	-
Mountain States	942,919	1,011,288	2.4%	-			-	-	-	911,910		-
Arizona	245,032	261,924	2.3%	15	38,222	39,526	41	1.1%	26	245,070	36,983	42
Colorado	252,035	273,721	2.8%	8	49,923	51,956	18	1.3%	18	247,069	46,897	18
Idaho	54,702	57,029	1.4%	32	34,825	35,375	50	0.5%	40	58,272	36,146	47
Montana	36,576	39,846	2.9%	7	36,918	39,251	42	2.1%	8	39,963	39,366	36
Nevada	119,242	123,903	1.3%	37	44,102	44,407	33	0.2%	42	109,471	39,235	37
New Mexico	81,179	84,310	1.3%	38	39,316	40,431	40	0.9%	29	74,996	35,965	48
Utah	**116,761**	**131,017**	**3.9%**	**3**	**42,075**	**45,165**	**30**	**2.4%**	**6**	**106,289**	**36,640**	**44**
Wyoming	37,392	39,538	2.0%	20	66,256	67,857	4	0.9%	32	30,779	52,826	8
Other States												
Alabama	172,998	180,727	1.5%	30	36,156	37,389	47	1.1%	27	176,341	36,481	45
Alaska	49,023	51,542	1.7%	24	68,656	70,113	2	0.7%	37	36,867	50,150	10
Arkansas	110,065	115,745	1.7%	26	37,658	39,111	43	1.3%	19	108,603	36,698	43
California	1,924,438	2,050,693	2.1%	16	51,546	53,497	13	1.2%	20	1,856,614	48,434	12
Connecticut	231,643	233,996	0.3%	49	64,766	65,070	5	0.2%	44	218,132	60,658	2
Delaware	56,684	58,028	0.8%	45	62,994	62,683	7	-0.2%	48	41,487	44,815	23
District of Columbia	104,407	105,465	0.3%	48	172,577	163,145	1	-1.9%	51	48,697	75,329	1
Florida	721,007	750,511	1.4%	34	38,258	38,384	46	0.1%	46	811,377	41,497	29
Georgia	406,992	424,606	1.4%	31	41,894	42,494	37	0.5%	41	378,156	37,845	41
Hawaii	66,432	70,110	1.8%	23	48,694	49,934	20	0.8%	35	63,468	45,204	22
Illinois	645,829	671,407	1.3%	36	50,296	52,119	17	1.2%	22	605,201	46,980	17
Indiana	280,408	294,212	1.6%	28	43,207	44,775	31	1.2%	21	253,779	38,622	40
Iowa	140,473	150,512	2.3%	12	46,052	48,703	21	1.9%	10	138,337	44,763	24
Kansas	124,521	132,153	2.0%	19	43,556	45,665	28	1.6%	14	128,541	44,417	25
Kentucky	164,068	170,667	1.3%	35	37,746	38,830	44	0.9%	28	159,172	36,214	46
Louisiana	220,819	222,008	0.2%	50	48,594	47,997	24	-0.4%	50	190,590	41,204	30
Maine	50,945	51,163	0.1%	51	38,374	38,517	45	0.1%	45	54,359	40,924	32
Maryland	313,016	322,234	1.0%	43	54,080	54,351	11	0.2%	43	319,125	53,826	6
Massachusetts	396,122	420,748	2.0%	18	60,354	62,866	6	1.4%	17	383,152	57,248	3
Michigan	385,779	408,218	1.9%	22	39,056	41,252	39	1.8%	11	386,471	39,055	38
Minnesota	268,941	289,125	2.4%	11	50,641	53,340	14	1.7%	12	257,466	47,500	14
Mississippi	93,027	96,979	1.4%	33	31,331	32,421	51	1.2%	23	101,442	33,913	51
Missouri	255,496	258,135	0.3%	47	42,610	42,708	35	0.1%	47	245,771	40,663	33
Nebraska	89,873	98,250	3.0%	6	49,119	52,582	15	2.3%	7	88,114	47,157	15
New Hampshire	62,187	64,118	1.0%	42	47,224	48,447	23	0.9%	34	67,513	51,013	9
New Jersey	493,213	509,067	1.1%	41	56,025	57,203	9	0.7%	38	492,897	55,386	4
New York	1,182,857	1,226,619	1.2%	39	60,974	62,420	8	0.8%	36	1,070,236	54,462	5
North Carolina	418,473	439,672	1.7%	27	43,778	44,646	32	0.7%	39	380,954	38,683	39
North Dakota	34,564	49,772	13.0%	1	51,254	68,804	3	10.4%	1	38,472	53,182	7
Ohio	488,557	526,196	2.5%	10	42,342	45,476	29	2.4%	5	474,973	41,049	31
Oklahoma	148,038	164,303	3.5%	5	39,377	42,670	36	2.7%	4	161,188	41,861	28
Oregon	190,136	211,241	3.6%	4	49,538	53,750	12	2.8%	3	156,605	39,848	34
Pennsylvania	584,412	603,872	1.1%	40	45,976	47,274	26	0.9%	30	590,171	46,202	19
Rhode Island	48,719	49,962	0.8%	44	46,277	47,515	25	0.9%	33	49,410	46,989	16
South Carolina	162,616	172,176	1.9%	21	35,078	36,059	49	0.9%	31	171,088	35,831	49
South Dakota	37,960	41,142	2.7%	9	46,507	48,696	22	1.6%	15	38,897	46,039	20
Tennessee	252,035	269,602	2.3%	13	39,649	41,503	38	1.5%	16	256,969	39,558	35
Texas	1,201,992	1,387,598	4.9%	2	47,617	52,465	16	3.3%	2	1,160,079	43,862	26
Vermont	26,349	27,723	1.7%	25	42,097	44,241	34	1.7%	13	28,501	45,483	21
Virginia	417,978	426,423	0.7%	46	52,084	51,623	19	-0.3%	49	403,425	48,838	11
Washington	356,398	381,017	2.3%	14	52,850	54,654	10	1.1%	25	332,655	47,717	13
West Virginia	64,553	68,541	2.1%	17	34,818	36,963	48	2.0%	9	65,889	35,533	50
Wisconsin	252,794	264,126	1.5%	29	44,431	45,993	27	1.2%	24	248,335	43,244	27

* Amounts are inflation-adjusted using CPI-U-RS. Calculations by Utah Foundation.

Source: U.S. Bureau of Economic Analysis, State Gross Domestic Product

Figure 12.5
Household Income

Division/State	Median Household Income (2013 Dollars) 2010	2011	2012	2013	2yr Average Difference*	% Change	Rank	3yr Average 2011-2013	Rank	Workers Per Household** 2013	Rank
United States	$52,646	$51,842	$51,758	$51,939	$49	0.1%	-	$51,846	-	1.4	-
Mountain States											
Arizona	50,103	50,358	47,728	50,602	122	0.2%	28	49,562	33	1.3	39
Colorado	64,353	60,724	58,087	63,371	1,324	2.2%	15	60,727	10	1.4	14
Idaho	50,268	49,154	48,618	51,767	1,307	2.7%	12	49,847	32	1.3	34
Montana	44,103	41,716	45,743	44,132	1,208	2.8%	10	43,864	41	1.3	40
Nevada	54,702	48,724	48,021	45,369	-1,677	-3.5%	44	47,371	38	1.4	12
New Mexico	48,221	43,482	44,055	42,127	-678	-1.5%	36	43,221	45	1.3	38
Utah	**60,579**	**57,475**	**59,189**	**62,967**	**2,746**	**4.7%**	**4**	**59,877**	**13**	**1.6**	**3**
Wyoming	55,771	56,456	58,348	55,700	-378	-0.7%	33	56,835	15	1.4	18
Other States											
Alabama	43,733	44,112	44,096	41,381	-1,366	-3.1%	42	43,196	46	1.2	48
Alaska	61,804	59,483	64,573	61,137	827	1.3%	21	61,731	7	1.6	1
Arkansas	41,226	42,778	39,585	39,919	-1,429	-3.5%	45	40,760	49	1.2	50
California	57,996	55,274	57,849	57,528	1,127	2.0%	19	56,883	14	1.5	4
Connecticut	70,512	67,752	65,181	67,781	14	0.0%	31	66,905	3	1.5	7
Delaware	58,990	56,613	49,684	52,219	-2,197	-4.1%	47	52,839	24	1.4	19
District of Columbia	60,822	57,225	66,194	60,675	1,725	2.8%	8	61,365	8	1.4	21
Florida	47,080	46,716	46,740	47,886	584	1.2%	22	47,114	39	1.3	33
Georgia	47,134	47,615	48,820	47,439	-88	-0.2%	32	47,958	35	1.4	22
Hawaii	63,611	61,156	57,081	61,408	126	0.2%	29	59,882	12	1.6	2
Illinois	54,198	52,446	52,490	57,196	2,375	4.5%	5	54,044	22	1.4	15
Indiana	49,295	46,033	46,829	50,553	2,260	4.9%	3	47,805	36	1.3	31
Iowa	52,368	52,013	54,219	54,855	1,421	2.7%	11	53,696	23	1.3	29
Kansas	49,204	47,796	50,730	51,485	1,844	3.7%	6	50,003	31	1.3	26
Kentucky	43,915	41,280	41,683	42,158	439	1.1%	24	41,707	48	1.2	49
Louisiana	41,988	42,111	39,653	39,622	-1,245	-3.0%	41	40,462	50	1.3	44
Maine	51,209	51,468	49,872	50,121	-673	-1.3%	34	50,487	29	1.3	46
Maryland	68,592	71,337	72,880	65,262	-3,037	-4.2%	48	69,826	1	1.5	5
Massachusetts	65,102	65,575	64,581	62,963	-1,306	-2.0%	38	64,373	6	1.5	8
Michigan	49,441	50,625	50,742	48,801	-912	-1.8%	37	50,056	30	1.3	45
Minnesota	55,899	59,886	62,693	60,907	511	0.8%	27	61,162	9	1.4	13
Mississippi	40,770	42,558	37,173	40,850	-854	-2.1%	40	40,194	51	1.2	47
Missouri	48,951	47,409	50,487	50,311	1,451	3.0%	7	49,403	34	1.3	36
Nebraska	56,095	57,603	52,954	53,774	-1,915	-3.5%	43	54,777	19	1.4	20
New Hampshire	71,190	68,234	68,805	71,322	1,544	2.3%	14	69,453	2	1.4	11
New Jersey	67,275	64,565	67,661	61,782	-1,391	-2.1%	39	64,670	5	1.5	6
New York	53,186	52,445	48,373	53,843	699	1.4%	20	51,554	27	1.4	17
North Carolina	46,828	46,821	42,157	41,208	-2,806	-6.3%	50	43,395	43	1.3	32
North Dakota	54,495	58,375	56,576	52,888	-2,744	-4.8%	49	55,946	16	1.4	24
Ohio	49,024	46,243	45,020	46,398	77	0.2%	30	45,887	40	1.3	42
Oklahoma	46,051	50,186	49,110	43,777	-3,204	-6.5%	51	47,691	37	1.3	41
Oregon	54,063	53,367	52,527	56,307	1,470	2.8%	9	54,067	21	1.3	37
Pennsylvania	51,618	51,693	52,658	53,952	1,129	2.2%	16	52,768	25	1.3	30
Rhode Island	55,154	50,785	56,880	57,812	3,514	6.5%	1	55,159	17	1.4	16
South Carolina	44,550	41,516	45,046	43,749	1,117	2.6%	13	43,437	42	1.3	35
South Dakota	48,454	48,910	50,133	54,453	2,772	5.6%	2	51,165	28	1.4	23
Tennessee	41,230	43,789	43,620	42,499	-645	-1.5%	35	43,303	44	1.3	43
Texas	50,499	50,799	52,681	53,027	1,114	2.2%	17	52,169	26	1.4	9
Vermont	59,753	53,715	56,390	54,842	564	1.0%	25	54,982	18	1.4	25
Virginia	64,496	64,853	65,571	67,620	1,383	2.1%	18	66,015	4	1.4	10
Washington	60,004	58,881	63,091	60,106	612	1.0%	26	60,692	11	1.3	27
West Virginia	45,703	43,315	44,186	40,241	-1,538	-3.5%	46	42,581	47	1.1	51
Wisconsin	53,795	53,918	53,850	55,258	670	1.2%	23	54,342	20	1.3	28

Note: Because the sample of households contacted in small population states like Utah is relatively few in number, the data collected for two or three years are combined to calculate less variable estimates. The Census Bureau recommends using two-year averages for evaluating changes in state estimates over time, and three-year averages when comparing the relative ranking of states.

*Two-year average difference is the difference between the 2011/2012 average and 2012/2013 average.
**Workers per household was calculated by dividing the total labor force count over the number of households. (Census ACS)

Sources:
1. U.S. Census Bureau, Current Population Survey, Annual Social and Economic Supplements
2. U.S. Census Bureau, American Community Survey

Figure 12.6
Family Income

Division/State	Median Family Income (in 2013 dollars*) 2010	2011	2012	2013	3 Year Average 2011-13	Rank	Workers Per Family* 2013	Rank
United States	$64,754	$63,650	$63,436	$64,030	$63,705	-	2.1	-
Mountain States								
Arizona	59,139	57,305	57,617	57,163	57,362	37	2.0	12
Colorado	72,437	71,579	72,116	72,043	71,913	12	2.2	43
Idaho	55,922	54,701	55,275	56,176	55,384	43	1.9	6
Montana	58,235	58,225	60,574	60,122	59,640	33	2.0	18
Nevada	64,309	58,564	57,782	59,462	58,603	35	2.2	45
New Mexico	54,510	53,593	52,197	54,565	53,451	48	2.0	17
Utah	65,832	65,053	65,743	67,231	66,009	22	2.1	27
Wyoming	70,344	71,081	69,827	71,446	70,785	16	2.1	31
Other States								
Alabama	53,878	53,848	53,466	54,045	53,786	47	1.8	5
Alaska	82,226	78,493	81,385	85,385	81,754	5	2.4	50
Arkansas	50,267	50,453	51,031	50,415	50,633	50	1.8	2
California	69,960	67,815	67,177	68,222	67,738	20	2.2	44
Connecticut	86,803	86,075	86,493	85,563	86,044	2	2.2	41
Delaware	73,448	72,152	71,682	69,394	71,076	15	2.1	26
District of Columbia	82,816	78,304	83,463	72,337	78,035	8	3.1	51
Florida	56,724	55,886	55,573	55,774	55,744	41	2.0	19
Georgia	58,985	56,966	57,508	57,458	57,311	38	2.0	22
Hawaii	81,341	76,886	78,572	80,316	78,591	7	2.3	49
Illinois	69,891	67,922	69,703	69,557	69,061	18	2.2	37
Indiana	59,155	59,190	59,447	59,428	59,355	34	2.0	14
Iowa	65,083	65,065	65,054	66,684	65,601	24	2.1	29
Kansas	65,186	64,160	63,870	64,969	64,333	26	2.0	20
Kentucky	53,839	53,772	53,782	54,690	54,081	46	1.8	4
Louisiana	56,044	55,516	54,845	55,871	55,410	42	1.9	10
Maine	62,177	60,460	59,542	60,141	60,048	32	2.0	21
Maryland	88,823	86,818	87,234	87,204	87,085	1	2.3	46
Massachusetts	84,032	83,298	84,183	83,813	83,765	4	2.3	48
Michigan	59,938	60,142	60,157	60,846	60,382	31	2.0	11
Minnesota	74,387	73,869	74,579	75,112	74,520	10	2.2	38
Mississippi	48,595	47,958	46,523	47,615	47,366	51	1.8	3
Missouri	60,059	58,639	58,106	58,754	58,500	36	2.0	16
Nebraska	64,971	65,759	64,364	64,763	64,962	25	2.1	36
New Hampshire	79,739	79,346	79,665	77,646	78,886	6	2.1	34
New Jersey	88,065	85,194	85,669	85,426	85,430	3	2.1	33
New York	70,404	69,240	69,389	70,485	69,705	17	2.2	42
North Carolina	56,539	56,014	55,794	56,111	55,973	40	2.0	13
North Dakota	69,667	69,315	71,599	73,844	71,586	13	2.3	47
Ohio	60,384	60,657	60,961	61,030	60,883	28	2.0	15
Oklahoma	55,512	55,662	55,787	56,655	56,035	39	1.9	8
Oregon	60,536	60,441	60,340	61,767	60,849	29	2.0	23
Pennsylvania	66,123	65,544	66,055	66,522	66,040	21	2.1	25
Rhode Island	72,452	72,091	72,329	71,608	72,009	11	2.2	39
South Carolina	55,240	54,106	53,530	54,686	54,107	45	1.9	9
South Dakota	64,090	64,276	62,399	61,299	62,658	27	2.1	32
Tennessee	54,577	54,140	54,117	54,691	54,316	44	1.9	7
Texas	60,444	60,089	60,633	61,208	60,643	30	2.1	24
Vermont	66,855	68,555	67,007	68,382	67,981	19	2.2	40
Virginia	77,433	77,162	75,567	75,524	76,084	9	2.1	35
Washington	71,933	71,080	70,953	71,371	71,135	14	2.1	28
West Virginia	52,273	51,468	52,066	51,596	51,710	49	1.7	1
Wisconsin	66,334	66,009	66,101	65,618	65,909	23	2.1	30

Note: Because the sample of households contacted in small population states like Utah is relatively few in number, the data collected for two or three years are combined to calculate less variable estimates. The Census Bureau recommends using two-year averages for evaluating changes in state estimates over time, and three-year averages when comparing the relative ranking of states.

* Workers per family was calculated by dividing the total labor force count over the number of families.

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

2013, the state unemployment rate was 4.4 percent, fourth lowest in the nation, and significantly lower than the national unemployment rate (7.4 percent). Utah's rate continued to drop through 2014.

Poverty

Utah's poverty rate in 2013 was 8.3 percent, and had the third lowest three-year average (10.1 percent). The poverty rate in Utah increased between 2010 and 2011, remained constant between 2011 and 2012, and then decreased significantly in 2013. When comparing the change in two-year average poverty rates from 2012 to 2013, Utah ranks sixth most improved in the nation.

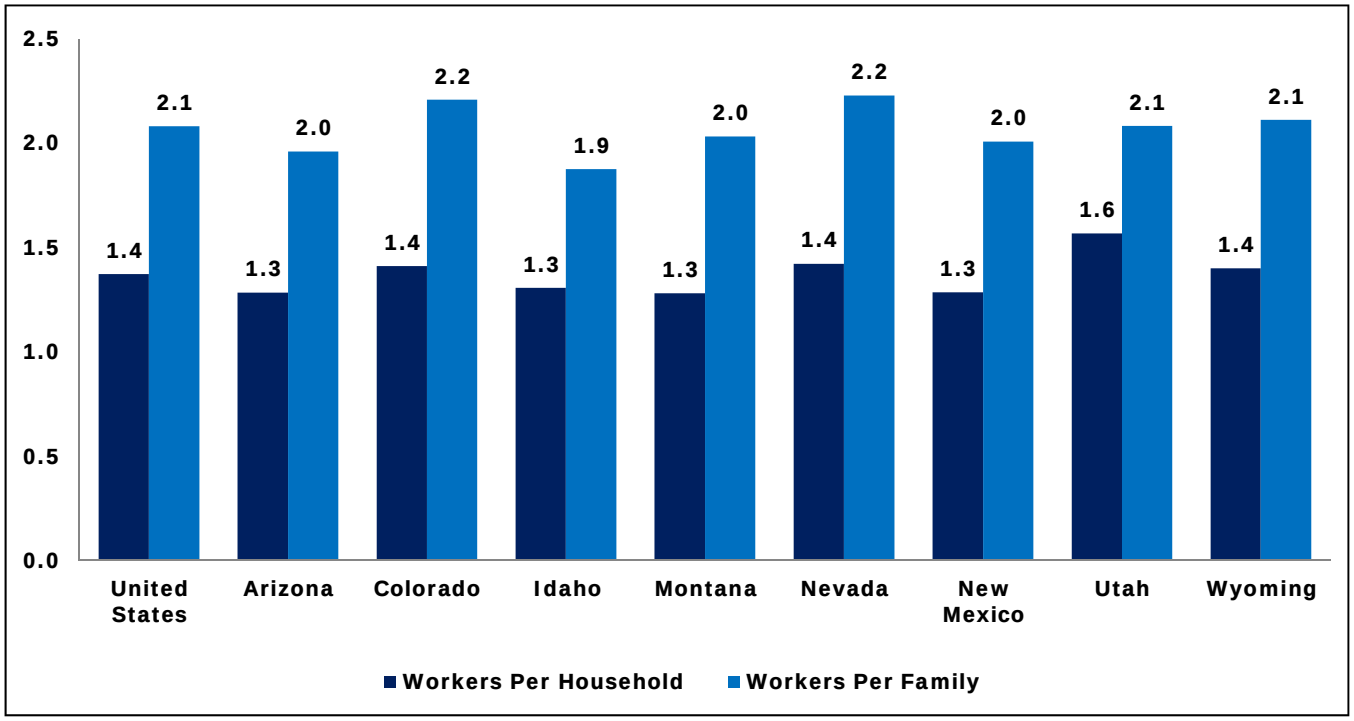
2015 Outlook

Utah's economy is likely to remain vibrant. Population growth will continue to outpace the western states and the nation as a whole. Utah's unemployment rate is projected to remain steady as more people reenter the workforce. As the labor force participation rate nears its peak, more of those who want to work full time will be able to, and Utah will likely see wages rise to attract workers. As this happens, poverty rates should continue to move downward.

Conclusion

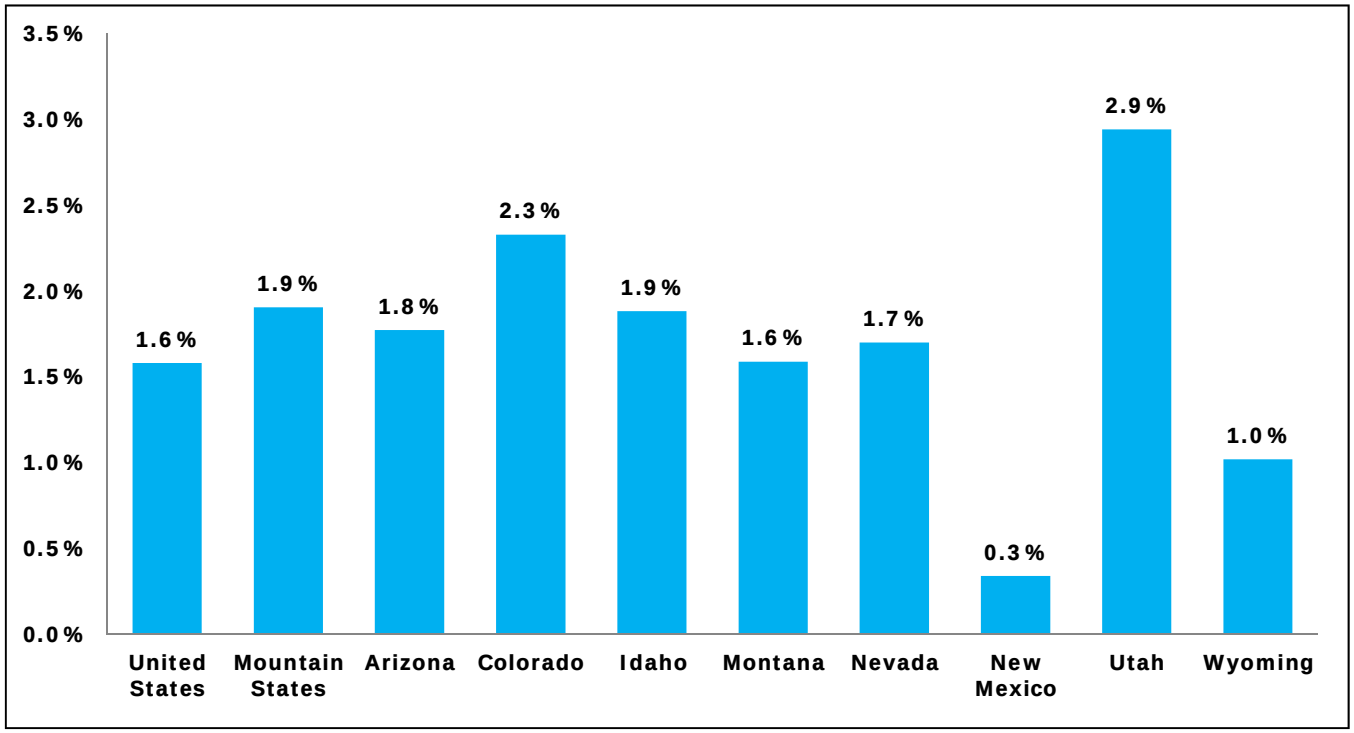
Utah has been experiencing relatively robust economic growth since the end of the Great Recession. State population has been increasing, which is consistent with large family size and desirability for employment. Utah's unemployment rate in November 2014 was 3.6 percent. While poverty rates are comparatively low, 250,000 people in the state do not earn enough to subsist. Accordingly, although Utah is experiencing an economic strength that is uncommon across the U.S., there is still work to be done.

Figure 12.7
Workers per Household and per Family: 2013



Source: U.S. Bureau of Economic Analysis

Figure 12.8
Average Annual Employment Growth Rate: 2010-2013



Source: U.S. Bureau of Labor Statistics

Figure 12.9
Average Annual Pay and Earnings

	Average Annual Pay (2013 dollars*)						Median Earnings of Full-Time Workers (2013 Dollars*)						Percent of Full-Time Workers	
			3yr Average		Adj. Annual Growth Rate				3yr Average		Adj. Annual Growth Rate			
Division/State	2010	2013	2011-13	Rank	2010-13	Rank	2010	2013	2011-13	Rank	2010-13	Rank	2013	Rank
United States	$49,949	$49,808	$49,858	-	-0.1%	-	$44,362	$42,498	$42,950	-	-1.4%	-	68.8%	-
Mountain States														
Arizona	46,260	45,921	46,117	21	-0.2%	35	43,183	41,093	41,296	27	-1.6%	45	68.6%	29
Colorado	51,142	50,873	51,002	13	-0.2%	27	48,145	46,347	46,820	14	-1.3%	39	67.2%	35
Idaho	37,287	36,836	36,804	50	-0.4%	38	38,596	36,992	37,515	47	-1.4%	44	65.8%	43
Montana	36,961	37,575	37,427	48	0.6%	5	38,712	38,221	37,961	44	-0.4%	23	64.5%	49
Nevada	45,420	44,119	44,354	26	-1.0%	50	42,813	40,010	40,295	35	-2.2%	51	68.5%	30
New Mexico	41,949	40,809	41,187	40	-0.9%	49	39,783	39,901	38,810	41	0.2%	7	68.0%	34
Utah	**42,083**	**41,792**	**41,804**	**36**	**-0.2%**	**32**	**43,537**	**42,326**	**42,512**	**22**	**-0.9%**	33	**64.9%**	**48**
Wyoming	44,833	44,972	45,048	23	0.1%	12	46,143	45,547	45,157	17	-0.4%	24	69.5%	20
Other States														
Alabama	43,045	42,276	42,511	34	-0.6%	44	39,421	39,026	38,950	39	-0.3%	17	71.3%	7
Alaska	51,529	51,566	51,354	12	0.0%	18	54,284	50,738	50,580	6	-2.1%	50	65.3%	44
Arkansas	38,734	38,941	38,778	47	0.2%	9	36,034	35,718	35,961	50	-0.3%	14	71.7%	5
California	56,929	57,111	57,233	6	0.1%	11	48,923	46,938	47,258	11	-1.4%	42	66.0%	42
Connecticut	63,532	62,357	62,891	3	-0.6%	45	55,674	54,206	55,017	2	-0.9%	32	66.5%	40
Delaware	51,998	52,040	52,276	10	0.0%	17	45,912	46,343	46,774	15	0.3%	4	69.1%	25
District of Columbia	85,685	83,054	83,827	1	-1.0%	51	63,675	65,361	64,560	1	0.9%	2	74.5%	1
Florida	44,425	43,649	43,771	30	-0.6%	43	39,258	37,176	37,803	45	-1.8%	48	69.2%	24
Georgia	46,901	46,760	46,800	20	-0.1%	25	42,463	40,328	41,011	31	-1.7%	47	71.3%	8
Hawaii	44,562	43,845	43,950	28	-0.5%	42	43,498	43,104	42,863	20	-0.3%	15	68.7%	27
Illinois	52,882	52,590	52,733	8	-0.2%	28	47,690	46,672	46,729	16	-0.7%	29	68.5%	31
Indiana	41,941	41,660	41,728	38	-0.2%	31	42,409	40,671	41,093	30	-1.4%	43	68.2%	33
Iowa	40,755	41,107	40,880	42	0.3%	8	41,010	41,000	41,273	28	0.0%	9	69.5%	21
Kansas	41,599	41,548	41,560	39	0.0%	21	41,744	40,958	40,914	32	-0.6%	28	70.2%	13
Kentucky	41,368	40,793	40,965	41	-0.5%	40	39,346	39,130	38,947	40	-0.2%	12	69.2%	22
Louisiana	44,297	44,008	43,942	29	-0.2%	30	40,189	40,718	40,454	34	0.4%	3	71.6%	6
Maine	39,892	39,279	39,275	46	-0.5%	41	41,452	40,090	40,711	33	-1.1%	35	65.0%	47
Maryland	55,278	54,052	54,591	7	-0.7%	48	55,227	53,412	53,572	5	-1.1%	36	72.6%	3
Massachusetts	61,721	61,790	61,792	4	0.0%	16	55,274	54,713	54,229	4	-0.3%	16	66.1%	41
Michigan	47,478	47,131	47,332	19	-0.2%	34	45,102	42,520	43,294	19	-1.9%	49	65.0%	46
Minnesota	49,987	50,116	49,917	15	0.1%	13	47,274	46,797	46,894	13	-0.3%	18	66.8%	38
Mississippi	36,692	36,455	36,359	51	-0.2%	29	35,336	35,234	35,595	51	-0.1%	10	71.1%	9
Missouri	43,461	43,066	43,108	32	-0.3%	37	40,465	40,006	39,937	37	-0.4%	21	69.1%	26
Nebraska	39,877	39,965	39,813	45	0.1%	14	39,854	40,198	39,998	36	0.3%	5	70.1%	14
New Hampshire	49,100	48,963	48,969	16	-0.1%	24	49,270	48,768	49,199	8	-0.3%	19	66.8%	37
New Jersey	60,238	59,467	59,522	5	-0.4%	39	55,476	54,487	54,744	3	-0.6%	27	70.0%	15
New York	64,415	63,089	63,556	2	-0.7%	46	49,165	48,648	48,473	9	-0.3%	20	69.6%	19
North Carolina	43,931	43,795	43,719	31	-0.1%	26	39,900	39,314	39,356	38	-0.5%	26	69.2%	23
North Dakota	40,736	47,779	45,875	22	5.5%	1	39,617	41,586	41,194	29	1.6%	1	69.7%	17
Ohio	44,646	44,671	44,688	25	0.0%	20	43,600	41,947	42,252	25	-1.3%	40	68.3%	32
Oklahoma	40,852	42,457	42,079	35	1.3%	2	38,009	37,020	37,235	48	-0.9%	31	73.0%	2
Oregon	44,525	45,019	44,850	24	0.4%	7	43,554	42,055	42,532	21	-1.2%	37	62.6%	51
Pennsylvania	48,861	49,077	48,964	17	0.1%	10	44,586	44,446	44,051	18	-0.1%	11	68.7%	28
Rhode Island	47,698	47,732	47,488	18	0.0%	19	47,474	47,732	47,243	12	0.2%	6	64.3%	50
South Carolina	40,121	39,792	39,816	44	-0.3%	36	39,225	37,243	37,786	46	-1.7%	46	69.6%	18
South Dakota	36,679	37,225	36,989	49	0.5%	6	36,830	36,397	36,864	49	-0.4%	22	69.7%	16
Tennessee	44,415	44,091	44,220	27	-0.2%	33	39,151	37,755	38,017	43	-1.2%	38	70.4%	12
Texas	50,163	51,201	50,997	14	0.7%	4	41,442	41,209	41,373	26	-0.2%	13	72.1%	4
Vermont	42,131	42,043	41,779	37	-0.1%	23	43,250	42,004	42,276	24	-1.0%	34	65.1%	45
Virginia	53,047	51,918	52,260	11	-0.7%	47	49,616	48,357	48,376	10	-0.8%	30	71.0%	10
Washington	51,834	53,050	52,606	9	0.8%	3	50,439	49,707	49,822	7	-0.5%	25	67.1%	36
West Virginia	40,252	40,201	40,331	43	0.0%	22	38,568	38,659	38,186	42	0.1%	8	70.6%	11
Wisconsin	42,699	42,777	42,607	33	0.1%	15	43,589	41,881	42,405	23	-1.3%	41	66.6%	39

Note: Because the sample of households contacted in small population states like Utah is relatively few in number, the data collected are combined to calculate variable estimates. The Census Bureau recommends using three-year averages when comparing the relative ranking of states.

* Amounts are inflation-adjusted using CPI-U-RS. Calculations by Utah Foundation.

Sources:
1. U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages
2. U.S. Census Bureau, American Community Survey

Figure 12.10
Employees and Unemployment

Division/State	Employees on Non-Farm Payrolls (thousands) 2010	2013	2013 Rank	Adj. Annual Growth Rate 2010-13	Rank	Unemployment Rate 2010	2011	2012	2013	Rank	Change 2010-13	Rank
United States	139,337	146,046	-	1.6%	-	9.6%	8.9%	8.1%	7.4%	-	-2.2%	-
Mountain States	9,025	9,551	-	1.9%	-							
Arizona	2,386	2,515	21	1.8%	9	10.4%	9.4%	8.3%	8.0%	39	-2.4%	15
Colorado	2,222	2,381	22	2.3%	4	9.0%	8.5%	7.8%	6.8%	26	-2.2%	18
Idaho	604	638	41	1.9%	7	8.7%	8.4%	7.3%	6.2%	15	-2.5%	14
Montana	428	449	45	1.6%	17	6.7%	6.5%	6.0%	5.6%	14	-1.1%	44
Nevada	1,118	1,176	34	1.7%	12	13.8%	13.2%	11.5%	9.8%	51	-4.0%	2
New Mexico	803	811	37	0.3%	51	8.0%	7.6%	7.1%	6.9%	27	-1.1%	45
Utah	**1,183**	**1,290**	**32**	**2.9%**	**2**	**8.1%**	**6.8%**	**5.4%**	**4.4%**	**4**	**-3.7%**	**4**
Wyoming	282	291	51	1.0%	38	7.0%	6.1%	5.4%	4.6%	6	-2.4%	15
Other States												
Alabama	1,871	1,903	24	0.6%	48	9.2%	8.5%	7.1%	6.5%	18	-2.7%	11
Alaska	324	336	49	1.2%	28	8.0%	7.6%	6.9%	6.5%	18	-1.5%	34
Arkansas	1,163	1,177	33	0.4%	50	7.9%	8.0%	7.5%	7.5%	33	-0.4%	51
California	14,210	15,147	1	2.2%	5	12.4%	11.8%	10.4%	8.9%	48	-3.5%	5
Connecticut	1,608	1,655	28	1.0%	39	9.3%	8.9%	8.3%	7.8%	38	-1.5%	33
Delaware	414	427	47	1.1%	33	8.0%	7.4%	7.1%	6.7%	23	-1.3%	40
District of Columbia	712	745	39	1.5%	20	10.1%	10.2%	9.1%	8.3%	44	-1.8%	28
Florida	7,173	7,579	4	1.9%	8	11.3%	10.3%	8.8%	7.2%	30	-4.1%	1
Georgia	3,861	4,033	10	1.5%	22	10.2%	9.9%	9.0%	8.2%	41	-2.0%	20
Hawaii	587	618	42	1.7%	11	6.7%	6.5%	5.7%	4.8%	8	-1.9%	24
Illinois	5,613	5,797	5	1.1%	34	10.5%	9.7%	8.9%	9.2%	49	-1.3%	38
Indiana	2,803	2,933	15	1.5%	19	10.0%	8.8%	8.1%	7.5%	33	-2.5%	13
Iowa	1,469	1,530	30	1.3%	26	6.3%	5.8%	5.2%	4.6%	6	-1.7%	30
Kansas	1,329	1,373	31	1.1%	32	7.1%	6.5%	5.8%	5.4%	11	-1.7%	31
Kentucky	1,770	1,835	26	1.2%	27	10.2%	9.5%	8.3%	8.3%	44	-1.9%	26
Louisiana	1,885	1,951	23	1.2%	29	7.4%	7.2%	6.5%	6.2%	15	-1.2%	43
Maine	593	602	43	0.5%	49	8.2%	7.7%	7.2%	6.7%	23	-1.5%	36
Maryland	2,517	2,596	20	1.0%	36	7.9%	7.3%	6.9%	6.6%	22	-1.3%	38
Massachusetts	3,218	3,356	13	1.4%	24	8.3%	7.3%	6.8%	7.1%	29	-1.2%	42
Michigan	3,863	4,105	8	2.0%	6	12.7%	10.4%	9.1%	8.8%	47	-3.9%	3
Minnesota	2,641	2,777	17	1.7%	13	7.4%	6.5%	5.6%	5.1%	9	-2.3%	17
Mississippi	1,093	1,112	35	0.6%	47	10.6%	10.6%	9.2%	8.6%	46	-2.0%	20
Missouri	2,658	2,730	19	0.9%	42	9.3%	8.5%	7.0%	6.5%	18	-2.8%	9
Nebraska	945	978	36	1.2%	30	4.7%	4.5%	4.0%	3.9%	3	-0.8%	50
New Hampshire	625	640	40	0.8%	43	6.2%	5.5%	5.5%	5.3%	10	-0.9%	47
New Jersey	3,848	3,935	11	0.7%	44	9.6%	9.3%	9.3%	8.2%	41	-1.4%	37
New York	8,557	8,909	3	1.4%	25	8.6%	8.2%	8.5%	7.7%	36	-0.9%	49
North Carolina	3,870	4,057	9	1.6%	18	10.8%	10.2%	9.2%	8.0%	39	-2.8%	9
North Dakota	376	444	46	5.7%	1	3.8%	3.4%	3.0%	2.9%	1	-0.9%	48
Ohio	5,031	5,252	7	1.4%	23	10.0%	8.7%	7.4%	7.4%	31	-2.6%	12
Oklahoma	1,556	1,633	29	1.6%	16	6.9%	5.9%	5.4%	5.4%	11	-1.5%	34
Oregon	1,602	1,674	27	1.5%	21	10.8%	9.7%	8.8%	7.7%	36	-3.1%	7
Pennsylvania	5,623	5,743	6	0.7%	45	8.5%	8.0%	7.9%	7.4%	31	-1.1%	45
Rhode Island	458	471	44	0.9%	40	11.7%	11.2%	10.3%	9.5%	50	-2.2%	19
South Carolina	1,807	1,897	25	1.6%	15	11.1%	10.3%	9.0%	7.6%	35	-3.5%	5
South Dakota	403	417	48	1.1%	31	5.1%	4.7%	4.2%	3.8%	2	-1.3%	40
Tennessee	2,615	2,750	18	1.7%	14	9.9%	9.3%	8.2%	8.2%	41	-1.7%	29
Texas	10,337	11,190	2	2.7%	3	8.2%	7.9%	6.8%	6.3%	17	-1.9%	25
Vermont	298	306	50	0.9%	41	6.4%	5.6%	4.9%	4.4%	4	-2.0%	20
Virginia	3,649	3,764	12	1.0%	37	7.1%	6.4%	5.9%	5.5%	13	-1.6%	32
Washington	2,837	2,987	14	1.7%	10	9.9%	9.2%	8.1%	7.0%	28	-2.9%	8
West Virginia	748	763	38	0.7%	46	8.5%	7.8%	7.2%	6.5%	18	-2.0%	20
Wisconsin	2,729	2,818	16	1.1%	35	8.5%	7.5%	6.9%	6.7%	23	-1.8%	27

Sources:
1. U.S. Bureau of Labor Statistics, State and Metro Area Employment, Hours, and Earnings
2. U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics

Figure 12.11
Poverty

Division/State	Percent of Persons in Poverty									
	Poverty Rate				Two-Year Average**				Three-Year Average**	
	2010	2011	2012	2013	2011-12	2012-13	Difference	Rank	2011-13	Rank
United States	15.1%	15.0%	15.0%	14.5%	15.0%	14.7%	-0.3%		14.8%	
Mountain States										
Arizona	18.6%	17.2%	19.0%	20.2%	18.1%	19.6%	1.5%	48	18.8%	47
Colorado	12.2%	13.2%	11.9%	10.6%	12.5%	11.2%	-1.3%	6	11.9%	16
Idaho	14.0%	15.7%	14.4%	12.9%	15.1%	13.7%	-1.4%	4	14.4%	28
Montana	14.0%	16.5%	13.4%	14.5%	15.0%	14.0%	-1.0%	9	14.8%	31
Nevada	16.4%	15.5%	15.8%	17.4%	15.6%	16.6%	1.0%	46	16.2%	38
New Mexico	18.6%	22.2%	20.4%	21.7%	21.3%	21.0%	-0.3%	23	21.4%	51
Utah	**10.0%**	**11.0%**	**11.0%**	**8.3%**	**11.0%**	**9.6%**	**-1.3%**	**6**	**10.1%**	3
Wyoming	9.6%	10.7%	9.6%	11.8%	10.2%	10.7%	0.5%	38	10.7%	9
Other States										
Alabama	17.3%	15.4%	16.2%	16.7%	15.8%	16.4%	0.7%	41	16.1%	37
Alaska	12.4%	11.7%	10.0%	10.9%	10.8%	10.5%	-0.4%	22	10.9%	12
Arkansas	15.5%	18.7%	20.1%	17.1%	19.4%	18.6%	-0.8%	13	18.7%	46
California	16.3%	16.9%	15.9%	14.9%	16.4%	15.4%	-1.0%	9	15.9%	35
Connecticut	8.3%	10.1%	10.3%	11.3%	10.2%	10.8%	0.6%	40	10.6%	7
Delaware	12.1%	13.7%	13.5%	14.0%	13.6%	13.7%	0.2%	34	13.7%	24
District of Columbia	19.9%	19.9%	18.4%	21.3%	19.1%	19.9%	0.7%	41	19.9%	48
Florida	16.0%	14.9%	15.3%	14.9%	15.1%	15.1%	0.0%	30	15.0%	33
Georgia	18.7%	18.4%	18.1%	16.3%	18.3%	17.2%	-1.1%	8	17.6%	43
Hawaii	12.1%	12.1%	13.8%	11.1%	13.0%	12.5%	-0.5%	19	12.3%	18
Illinois	14.1%	14.2%	12.6%	13.3%	13.4%	12.9%	-0.5%	19	13.4%	22
Indiana	16.3%	15.6%	15.2%	11.6%	15.4%	13.4%	-2.0%	2	14.1%	26
Iowa	10.3%	10.4%	10.3%	10.8%	10.4%	10.5%	0.2%	34	10.5%	5
Kansas	14.3%	14.3%	14.0%	13.2%	14.2%	13.6%	-0.6%	17	13.8%	25
Kentucky	17.7%	16.0%	17.9%	20.0%	16.9%	18.9%	2.0%	50	18.0%	45
Louisiana	21.6%	21.1%	21.1%	19.2%	21.1%	20.2%	-0.9%	12	20.5%	49
Maine	12.5%	13.4%	12.8%	12.3%	13.1%	12.5%	-0.6%	17	12.8%	20
Maryland	10.8%	9.3%	9.9%	10.3%	9.6%	10.1%	0.5%	38	9.8%	2
Massachusetts	10.6%	10.6%	11.3%	11.9%	10.9%	11.6%	0.7%	41	11.3%	14
Michigan	15.5%	15.0%	13.7%	14.5%	14.3%	14.1%	-0.2%	26	14.4%	28
Minnesota	10.5%	10.0%	10.0%	12.0%	10.0%	11.0%	1.0%	46	10.7%	9
Mississippi	22.7%	17.4%	22.0%	22.5%	19.7%	22.2%	2.6%	51	20.6%	50
Missouri	14.8%	15.4%	15.2%	13.7%	15.3%	14.5%	-0.8%	13	14.8%	31
Nebraska	10.2%	10.2%	12.2%	11.0%	11.2%	11.6%	0.4%	36	11.2%	13
New Hampshire	6.6%	7.6%	8.1%	9.0%	7.9%	8.6%	0.7%	41	8.3%	1
New Jersey	10.7%	11.4%	9.3%	11.1%	10.4%	10.2%	-0.2%	26	10.6%	7
New York	16.0%	16.0%	17.2%	14.5%	16.6%	15.9%	-0.7%	15	15.9%	35
North Carolina	17.4%	15.4%	17.2%	18.6%	16.3%	17.9%	1.6%	49	17.0%	39
North Dakota	12.2%	9.9%	11.4%	9.9%	10.7%	10.6%	0.0%	30	10.4%	4
Ohio	15.3%	15.1%	15.4%	13.7%	15.2%	14.5%	-0.7%	15	14.7%	30
Oklahoma	16.3%	13.9%	18.0%	14.0%	16.0%	16.0%	0.1%	32	15.3%	34
Oregon	14.2%	14.4%	13.5%	15.1%	13.9%	14.3%	0.4%	36	14.3%	27
Pennsylvania	12.2%	12.6%	13.9%	12.4%	13.2%	13.1%	-0.1%	28	13.0%	21
Rhode Island	13.6%	13.4%	13.6%	13.5%	13.5%	13.6%	0.1%	32	13.5%	23
South Carolina	17.0%	19.0%	16.7%	15.9%	17.8%	16.3%	-1.5%	3	17.2%	41
South Dakota	13.2%	14.5%	12.8%	10.3%	13.7%	11.5%	-2.1%	1	12.5%	19
Tennessee	16.7%	16.3%	18.6%	18.1%	17.4%	18.4%	0.9%	45	17.7%	44
Texas	18.4%	17.4%	17.0%	16.8%	17.2%	16.9%	-0.3%	23	17.1%	40
Vermont	10.8%	11.6%	11.2%	8.7%	11.4%	10.0%	-1.4%	4	10.5%	5
Virginia	10.7%	11.4%	10.6%	10.4%	11.0%	10.5%	-0.5%	19	10.8%	11
Washington	11.5%	12.5%	11.6%	12.0%	12.1%	11.8%	-0.3%	23	12.0%	17
West Virginia	16.9%	17.5%	16.7%	17.3%	17.1%	17.0%	-0.1%	28	17.2%	41
Wisconsin	9.9%	13.1%	11.4%	11.0%	12.2%	11.2%	-1.0%	9	11.8%	15

Note: Because the sample of households contacted in small population states like Utah is relatively few in number, the data collected for two or three years are combined to calculate less variable estimates. The Census Bureau recommends using two-year averages for evaluating changes in state estimates over time, and three-year averages when comparing the relative ranking of states.

Source: U.S. Census Bureau, Current Population Survey, Annual Social and Economic Supplements

Social Indicators

Social indicators and quality of life are subjective concepts and difficult to measure. The connection between economic performance and quality of life, however, is indisputable and with the recovering economy, Utah remained among the top states. Utah's transportation infrastructure has become more diverse and growing. Utah's violent crime rate remained among the lowest in the United States. The poverty rate was below the national average and educational attainment continued to be among the highest in the nation. Utah ranked 11th in the indicators of child well-being and sixth highest in overall health status. The combination of these and other measurable data show Utah's quality of life continues to be among the best in the nation.

Utah Quality of Life Information

Utah's Kids Count

The Annie E. Casey Foundation ranked Utah 11th in the nation in child well-being in its *2014 Kids Count Data Book*, higher than the 2013 rank of 14th. This foundation tracks indicators of child well-being and determines a state national composite rank by combining data from four areas: economic well-being, education, health, and family and community.

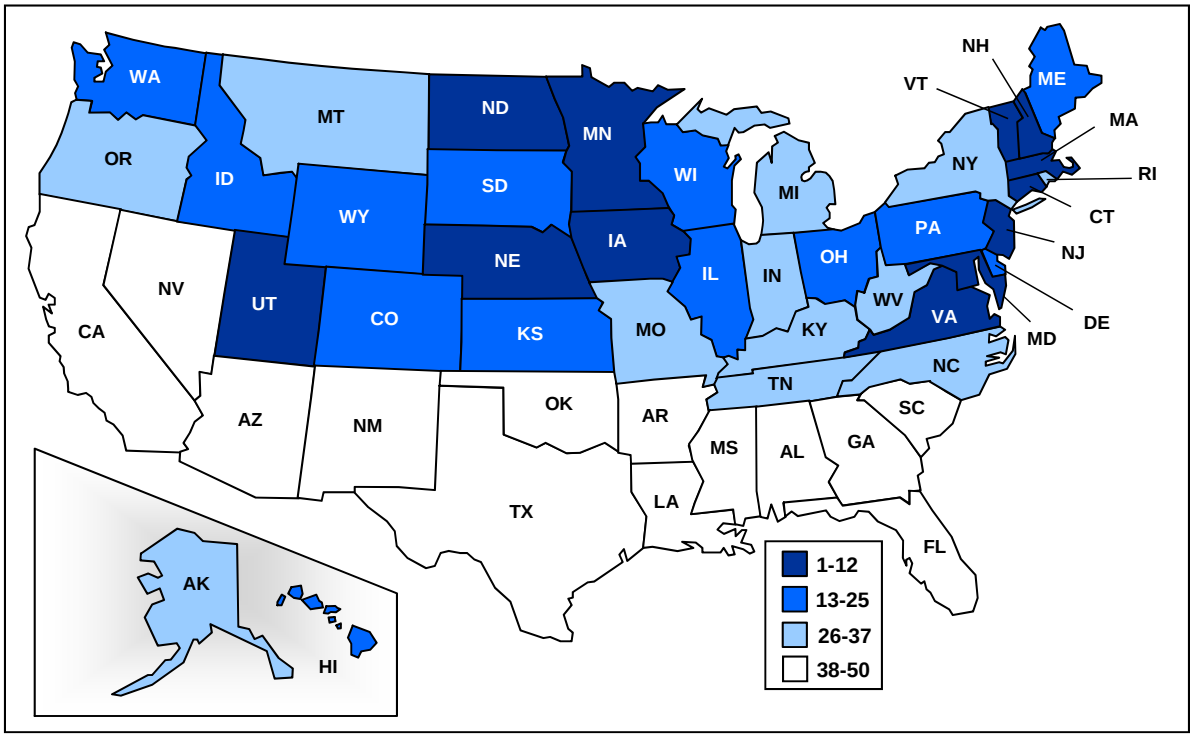
Transportation Choices

The 2013 American Community Survey showed 76 percent of working Utahns drove alone as their means of transportation to work, 11.8 percent carpooled, 2.3 percent used public transportation, 2.6 percent walked, and 5.1 percent worked at home. The mean travel time to work was 21.2 minutes, which is the tenth shortest in the nation. Between 2012 and 2013, the Utah Transit Authority reported total regular service increased by 3.1 percent. Light rail expansion helped contribute a 6.8 percent increase in the number of passengers using TRAX. There was a 4.1 percent decrease in the number of people using vanpools and a 4.3 percent increase in the number of people using Paratransit service. A 103.2 percent increase in the number of passengers using commuter rail service was due to the FrontRunner South expansion. The 8.4 percent decrease in the number of passengers using bus service was a result of decreased bus service and reduced commuter bus routes. The FrontLines 2015 project was completed in 2013 with the opening of the Airport and Draper TRAX lines.

Computers and Internet Use

Utah has the second highest percentage of households with broadband internet access, 79.6 percent or 713,703 households. Data from the 2013 American Community Survey estimates that 91 percent of households in Utah have a computer. Of those households with a computer, 86.9 percent have a broadband internet subscription, 1.1 percent, have a dial-up, and 12.0 percent have a computer without an

Figure 13.1
2014 Kids Count Data Book: Overall Ranking



Source: Annie E. Casey Foundation

Figure 13.2
Crime, Education, and Home Ownership

	Violent Crime* per 100,000 People 2012 [1]		Property Crime** per 100,000 People 2012 [1]		Educational Attainment Persons 25 Years Old and Over 2013 [2] High School or Higher		Bachelor's Degree or Higher		Home Ownership Rates Q2 2014 [3]	
	Rate	Rank	Rate	Rank	Percent	Rank	Percent	Rank	Percent	Rank
U.S.	386.9	-	2,859.2	-	86.6	-	29.6	-	64.7	-
Alabama	449.9	15	3,502.2	8	84.5	44	23.5	45	73.6	5
Alaska	603.2	4	2,739.4	28	91.6	6	28.0	27	66.7	28
Arizona	428.9	16	3,539.2	7	85.9	35	27.4	30	64.2	39
Arkansas	469.1	12	3,660.1	3	84.4	45	20.6	49	66.2	31
California	423.1	17	2,758.7	25	81.7	51	31.0	18	54.9	49
Colorado	308.9	29	2,684.7	29	90.5	14	37.8	3	64.7	36
Connecticut	283.0	33	2,140.0	46	89.7	20	37.2	5	68.5	21
Delaware	547.4	7	3,340.9	14	88.3	30	29.8	20	75.6	2
District of Columbia	1,243.7	1	4,860.8	1	90.1	16	55.1	1	41.1	51
Florida	487.1	9	3,276.7	16	86.8	33	27.2	31	65.3	33
Georgia	378.9	22	3,410.6	9	85.5	41	28.3	25	62.3	42
Hawaii	239.2	42	3,075.2	20	91.0	12	31.2	16	56.6	47
Idaho	207.9	45	1,983.5	50	89.4	22	26.2	39	68.2	22
Illinois	414.8	18	2,578.7	31	87.8	31	32.1	14	66.4	29
Indiana	345.7	26	3,029.2	21	87.6	32	23.8	43	71.9	10
Iowa	263.9	36	2,271.8	42	91.6	6	26.4	37	69.2	16
Kansas	354.6	23	3,143.2	18	90.1	16	31.1	17	61.3	44
Kentucky	222.6	44	2,552.9	34	84.1	47	22.6	46	68.9	17
Louisiana	496.9	8	3,540.6	6	83.1	48	22.5	47	64.7	36
Maine	122.7	51	2,509.9	36	91.8	5	28.2	26	70.2	14
Maryland	476.8	10	2,753.5	27	89.1	25	37.4	4	66.0	32
Massachusetts	405.5	21	2,153.0	45	89.9	19	40.3	2	62.4	41
Michigan	454.5	13	2,530.5	35	89.4	22	26.9	34	75.9	1
Minnesota	230.9	43	2,568.3	33	92.4	4	33.5	11	72.3	9
Mississippi	260.8	37	2,811.0	23	82.4	49	20.4	50	73.0	8
Missouri	450.9	14	3,314.4	15	88.7	27	27.0	33	70.6	12
Montana	272.2	35	2,583.7	30	92.7	3	29.0	22	68.0	24
Nebraska	259.4	38	2,754.9	26	90.2	15	29.4	21	68.2	22
Nevada	607.6	3	2,809.4	24	85.2	42	22.5	47	56.4	48
New Hampshire	187.9	49	2,324.0	40	92.8	2	34.6	9	73.2	7
New Jersey	290.2	32	2,047.3	48	88.5	28	36.6	6	65.0	35
New Mexico	559.1	5	3,600.7	5	84.3	46	26.4	37	63.9	40
New York	406.8	20	1,922.0	51	85.6	38	34.1	10	53.2	50
North Carolina	353.4	24	3,369.5	12	85.7	37	28.4	24	67.4	26
North Dakota	244.7	41	2,010.1	49	91.5	9	27.1	32	64.4	38
Ohio	299.7	30	3,117.4	19	89.0	26	26.1	40	68.7	19
Oklahoma	469.3	11	3,401.0	10	86.7	34	23.8	43	68.6	20
Oregon	247.6	40	3,224.2	17	89.7	20	30.7	19	60.8	45
Pennsylvania	348.7	25	2,166.3	43	89.2	24	28.7	23	68.9	17
Rhode Island	252.4	39	2,572.3	32	85.9	35	32.4	13	60.2	46
South Carolina	558.8	6	3,822.2	2	85.6	38	26.1	40	75.4	3
South Dakota	321.8	27	2,060.1	47	91.6	6	26.6	35	70.2	14
Tennessee	643.6	2	3,371.4	11	85.6	38	24.8	42	66.3	30
Texas	408.6	19	3,361.8	13	81.9	50	27.5	29	61.5	43
Utah	**205.8**	**46**	**2,991.8**	**22**	**91.5**	**9**	**31.3**	**15**	**70.4**	**13**
Vermont	142.6	50	2,398.7	38	91.5	9	35.7	8	73.4	6
Virginia	190.1	48	2,162.1	44	88.4	29	36.1	7	67.6	25
Washington	295.6	31	3,658.6	4	90.1	16	32.7	12	65.1	34
West Virginia	316.3	28	2,364.9	39	84.6	43	18.9	51	74.8	4
Wisconsin	280.5	34	2,453.8	37	90.9	13	27.7	28	67.3	27
Wyoming	201.4	47	2,293.8	41	93.5	1	26.6	35	71.3	11

Note: Rank is high to low. When states share the same rank, the next lower rank is omitted.
* Violent crimes are offenses of murder, forcible rape, robbery, and aggravated assault.
** Property crimes are offenses of burglary, larceny-theft, and motor-vehicle thefts.

Sources:
1. Federal Bureau of Investigation, "Crime in the United States, 2012."
2. U.S. Census Bureau, 2013 American Community Survey
3. U.S. Census Bureau, Current Population Survey/Housing Vacancy Survey

internet subscription. Only 8.7 percent of Utah households do not have a computer.

Social Well-Being

Crime

The Federal Bureau of Investigation's Uniform Crime Reports for 2012 reported the rate of violent crime (murder and non-negligent manslaughter, forcible rape, robbery, and aggravated assault) for Utah was 205.8 per 100,000 people, the sixth lowest in the nation. Compared with a national rate of 386.9 violent crimes per 100,000 people in 2012, Utah continued to have a significantly lower rate of violent crime than the U.S.

Education

In 2013, the U.S. Census Bureau's American Community Survey reported 91.5 percent of Utahns had at least a high school degree, ranking Utah as the ninth highest state in the nation. The national rate was 86.6 percent. Utah also ranked 15th in higher education attainment, with 31.3 percent of persons 25 years and over having obtained a bachelor's degree or higher. The national rate was 29.6 percent.

Home Ownership

Utah's home ownership rate for the second quarter of 2014 was 70.4 percent, 13th highest in the nation. The rate for the nation was 64.7 percent. The states with the highest home ownership were Michigan with a rate of 75.9 percent, Delaware at 75.6 percent, South Carolina at 75.4

percent, West Virginia at 74.8 percent, and Alabama at 73.5 percent. The lowest rates of home ownership occurred in the District of Columbia with a rate of 41.1 percent, New York at 53.2 percent, California at 54.9 percent, Nevada at 56.4 percent, and Hawaii at 56.6 percent.

Vital Statistics

Utah's unique age structure affects its ranking among other states on many vital statistics. Data from the U.S. Census Bureau's 2013 estimates show 30.9 percent of Utah's population was younger than 18 years old, the highest percentage in the nation. Utah also has the second lowest percentage of the population age 65 and over (9.2 percent), behind Alaska at 8.1 percent. Utah's median age of 30.2 is the lowest in the nation.

Births

Preliminary data for 2013 from the National Center for Health Statistics revealed Utah's birth rate was 17.6 births per 1,000 people, which is the highest in the nation and substantially higher than the national rate of 12.5. In 2013, Alaska and North Dakota ranked second and third in the nation with birth rates of 15.5 and 14.7 respectively. New Hampshire had the lowest birth rate in the nation at 9.4, preceded by Vermont at 9.5 and Maine at 9.7.

Deaths

Data from the National Center for Health Statistics showed the overall death rate in Utah was 5.3 per 1,000 people in 2010, the second lowest in the nation. The age-adjusted death rate in Utah was 7.0 per 1,000 people. Data from the American Cancer Society revealed the number of Utah deaths caused by cancer per 100,000 people was 98.9 in 2014, the lowest in the nation.

Figure 13.3
Vital Statistics and Health

	Births per 1,000 People 2013 [1]		Deaths per 1,000 People 2010 [2]		Estimated Deaths by Cancer per 100,000 People 2014 [3]		State Health Ranking [4]		Persons Without Health Insurance 2013 [5]	
	Rate	Rank	Rate	Rank	Rate	Rank	2012 Rank	2013 Rank	Percent	Rank
U.S.	12.5	-	8.0	-	185.3	-	-	-	14.5	-
Alabama	12.1	34	10.0	2	217.4	9	45	47	13.6	25
Alaska	15.5	2	5.2	51	134.7	50	24	25	18.5	6
Arizona	13.0	16	7.3	42	172.0	41	26	28	17.1	9
Arkansas	13.0	16	9.9	3	227.4	4	48	49	16.0	14
California	13.1	13	6.3	48	151.2	47	21	21	17.2	8
Colorado	12.4	28	6.3	49	142.0	49	9	8	14.1	19
Connecticut	10.0	48	8.0	29	191.3	27	7	7	9.4	43
Delaware	11.9	38	8.6	24	213.9	10	32	31	9.1	44
District of Columbia	14.4	6	7.8	34	156.2	46	-	-	6.7	49
Florida	11.0	44	9.2	11	218.6	7	31	33	20.0	3
Georgia	13.1	13	7.4	40	163.3	45	39	38	18.8	4
Hawaii	13.5	11	7.1	46	174.5	39	1	1	6.7	49
Idaho	13.9	8	7.3	43	169.3	44	19	12	16.2	13
Illinois	12.4	28	7.8	33	186.5	30	30	30	12.7	29
Indiana	12.6	21	8.8	19	203.5	19	41	41	14.0	20
Iowa	12.6	21	9.1	13	206.4	17	17	18	8.1	47
Kansas	13.4	12	8.6	23	188.7	29	27	27	12.3	30
Kentucky	12.7	20	9.7	7	230.5	3	43	45	14.3	18
Louisiana	13.7	10	9.0	16	195.4	24	49	48	16.6	11
Maine	9.7	49	9.6	8	248.4	2	15	16	11.2	35
Maryland	12.3	30	7.5	38	177.1	36	20	24	10.2	41
Massachusetts	10.7	46	8.0	30	191.4	26	4	4	3.7	51
Michigan	11.5	41	8.7	21	210.2	14	33	34	11.0	36
Minnesota	12.8	19	7.3	41	179.9	34	3	3	8.2	46
Mississippi	12.9	18	9.8	5	212.3	13	50	50	17.1	9
Missouri	12.5	25	9.2	12	212.9	12	40	39	13.0	28
Montana	12.1	34	8.9	17	197.0	23	28	23	16.5	12
Nebraska	14.0	7	8.3	27	186.2	31	11	11	11.3	33
Nevada	12.6	21	7.3	44	171.7	42	37	37	20.7	2
New Hampshire	9.4	51	7.7	35	201.7	21	5	5	10.7	38
New Jersey	11.7	39	7.9	31	183.7	32	10	10	13.2	27
New Mexico	12.6	21	7.7	36	172.6	40	36	32	18.6	5
New York	12.3	30	7.6	37	175.3	38	18	15	10.7	38
North Carolina	12.2	33	8.3	28	192.7	25	34	35	15.6	16
North Dakota	14.7	3	8.8	18	175.6	37	8	9	10.4	40
Ohio	12.1	34	9.4	9	218.3	8	38	40	11.0	36
Oklahoma	13.9	8	9.7	6	207.2	16	46	44	17.7	7
Oregon	11.5	41	8.3	25	202.0	20	14	13	14.7	17
Pennsylvania	11.0	44	9.8	4	224.4	5	29	29	9.7	42
Rhode Island	10.3	47	9.1	14	203.5	18	16	19	11.6	32
South Carolina	12.0	37	9.0	15	208.4	15	44	43	15.8	15
South Dakota	14.6	4	8.7	20	190.6	28	23	22	11.3	33
Tennessee	12.3	30	9.4	10	219.8	6	42	42	13.9	24
Texas	14.6	4	6.6	47	143.0	48	35	36	22.1	1
Utah	**17.6**	**1**	**5.3**	**50**	**98.9**	**51**	**6**	**6**	**14.0**	**20**
Vermont	9.5	50	8.6	22	213.8	11	2	2	7.2	48
Virginia	12.5	25	7.4	39	178.6	35	22	26	12.3	30
Washington	12.5	25	7.2	45	180.0	33	12	14	14.0	20
West Virginia	11.3	43	11.5	1	252.4	1	47	46	14.0	20
Wisconsin	11.6	40	8.3	26	197.8	22	13	20	9.1	44
Wyoming	13.1	13	7.9	32	169.9	43	25	17	13.4	26

Note: Rank is high to low. When states share the same rank, the next lower rank is omitted.

Sources:
1. National Center for Health Statistics, "National Vital Statistics Reports," Vol 63, No 02. Data are preliminary
2. National Center for Health Statistics, "National Vital Statistics Reports," Vol 60, No 04. Not age adjusted. Data are preliminary
3. American Cancer Society, Cancer Facts and Figures 2014. Rate calculated by Bureau of Economic and Business Research based on 2013 U.S. Census Bureau Population Estimates
4. United Health Foundation, "America's Health: United Health Foundation State Health Rankings 2013"
5. Source: U.S. Census Bureau, 2013 American Community Survey

Figure 13.4
Poverty and Public Assistance

	All Ages in Poverty 2011-2013 [1]		Temporary Assistance for Needy Families (TANF) (Average) 2013 [2]			Supplemental Nutrition Assistance Program FY 2013[3] Average Monthly Participation					
				Rate per 1,000			Rate per 1,000			Rate per 1,000	
	Percent	Rank	Recipients	people	Rank	Persons	People	Rank	Households	Households	Rank
U.S.	14.8	-	3,712,912	11.7	-	47,636,090	133.1	-	23,052,396	275.0	-
Alabama	16.1	15	46,161	9.5	23	915,322	128.8	21	421,302	279.9	15
Alaska	10.9	40	9,464	12.9	14	91,364	172.9	2	38,279	412.7	2
Arizona	18.8	5	35,310	5.3	38	1,111,105	123.6	40	476,689	288.1	13
Arkansas	18.7	6	15,165	5.1	39	504,621	120.9	46	224,454	271.7	24
California	15.9	16	1,341,168	35.0	1	4,159,031	151.4	3	1,905,869	330.5	3
Colorado	11.9	36	41,413	7.9	29	507,934	135.1	12	231,488	296.5	6
Connecticut	10.6	44	28,899	8.0	27	425,320	138.7	6	233,171	252.9	38
Delaware	13.7	28	13,884	15.0	8	153,137	127.9	26	72,244	271.1	27
District of Columbia	19.9	4	16,780	26.0	2	144,889	135.2	11	81,904	239.1	45
Florida	15.0	19	93,471	4.8	41	3,556,473	138.4	7	1,943,902	253.2	37
Georgia	17.6	9	34,005	3.4	47	1,948,189	136.4	10	907,896	292.7	11
Hawaii	12.3	34	26,269	18.7	4	189,350	217.5	1	96,022	428.9	1
Idaho	14.4	23	2,783	1.7	50	227,006	127.3	31	97,927	295.1	8
Illinois	13.4	30	45,725	3.5	45	2,040,053	138.0	8	1,017,190	276.8	18
Indiana	14.1	26	23,768	3.6	44	926,011	131.5	17	415,518	293.0	9
Iowa	10.5	46	36,653	11.9	16	420,344	116.3	49	198,500	246.2	42
Kansas	13.8	27	19,324	6.7	35	316,983	124.7	36	149,233	264.8	31
Kentucky	18.0	7	61,284	13.9	9	872,439	127.3	30	420,211	264.4	32
Louisiana	20.5	3	15,616	3.4	48	940,100	131.2	19	425,648	289.7	12
Maine	12.8	32	14,305	10.8	20	249,119	122.8	42	130,374	234.6	48
Maryland	9.8	50	51,973	8.8	24	771,021	127.4	29	392,184	250.4	41
Massachusetts	11.3	38	88,924	13.3	13	887,619	130.9	20	498,580	233.1	50
Michigan	14.4	23	78,202	7.9	28	1,775,646	136.6	9	909,764	266.7	30
Minnesota	10.7	42	45,851	8.5	25	552,928	116.3	50	274,236	234.4	49
Mississippi	20.6	2	20,273	6.8	33	668,624	123.8	39	305,005	271.3	25
Missouri	14.8	20	74,314	12.3	15	929,943	128.0	25	437,443	272.2	23
Montana	14.8	20	7,371	7.3	32	128,531	124.7	37	59,398	269.7	28
Nebraska	11.2	39	12,543	6.7	34	179,711	122.7	43	79,379	277.8	17
Nevada	16.2	14	27,849	10.0	22	360,953	123.6	41	174,638	255.4	36
New Hampshire	8.3	51	7,286	5.5	37	117,315	115.8	51	56,201	241.6	43
New Jersey	10.6	44	73,171	8.2	26	876,266	135.0	13	432,270	273.6	22
New Mexico	21.4	1	36,035	17.3	5	440,362	128.6	22	197,359	286.9	14
New York	15.9	16	273,727	13.9	10	3,170,465	147.8	4	1,710,501	273.9	21
North Carolina	17.0	13	37,988	3.9	43	1,703,700	121.9	45	786,064	264.1	33
North Dakota	10.4	48	3,529	4.9	40	56,523	126.1	32	26,270	271.3	26
Ohio	14.7	22	132,422	11.4	18	1,824,675	133.5	14	889,427	273.9	20
Oklahoma	15.3	18	16,544	4.3	42	621,831	128.5	23	287,398	278.0	16
Oregon	14.3	25	59,630	15.2	6	817,575	127.4	28	451,420	230.8	51
Pennsylvania	13.0	31	176,058	13.8	11	1,784,790	128.3	24	869,836	263.3	35
Rhode Island	13.5	29	14,326	13.6	12	179,925	140.3	5	100,543	251.0	40
South Carolina	17.2	10	28,236	5.9	36	875,866	131.5	18	416,724	276.3	19
South Dakota	12.5	33	6,340	7.5	31	104,052	132.2	15	45,312	303.5	5
Tennessee	17.7	8	121,656	18.7	3	1,342,089	132.1	16	662,204	267.8	29
Texas	17.1	12	88,015	3.3	49	4,041,891	122.4	44	1,674,350	295.4	7
Utah	**10.1**	**49**	**10,105**	**3.5**	**46**	**251,626**	**125.2**	**34**	**101,027**	**311.7**	**4**
Vermont	10.5	46	7,186	11.5	17	100,541	124.4	38	52,337	238.9	46
Virginia	10.8	41	62,248	7.5	30	940,932	127.7	27	456,489	263.3	34
Washington	12.0	35	105,588	15.1	7	1,113,441	125.6	33	591,113	236.7	47
West Virginia	17.2	10	19,512	10.5	21	350,695	119.9	47	167,014	251.7	39
Wisconsin	11.8	37	63,636	11.1	19	856,730	116.6	48	416,826	239.6	44
Wyoming	10.7	42	759	1.3	51	38,046	124.8	35	16,211	292.9	10

Note: Rank is high to low. When states share the same rank, the next lower rank is omitted.

Sources:
1. U.S. Bureau of the Census, Current Population Survey, Annual Social and Economic Supplements
2. U.S. Department of Health and Human Services, Administration for Children and Families, "Total Number of Recipients 2013" Welfore reform replaced the Aid to Families with Dependent Children (AFDC) program with Temporary Assistance to Needy Families (TANF) as of July 1, 1997. National total includes recipients in U.S. territories. Rates calculated by the Bureau of Economic and Business Research using 2013 U.S. Census Bureau population estimates
3. U.S. Department of Agriculture, Food and Nutrition Service

Economic Development

2014 has been a year of continued economic recovery across the United States. While gains have been marginal nationally, Utah continues to be at the forefront of sustainable growth. November 2014 data from the Utah Department of Workforce Services shows that Utah's job growth rate (3.6 percent change) almost doubled the national rate (2.0 percent change) since November 2013.[1] This job growth rate reflects a total of 43,400 jobs that were added to Utah's economy.[2] Utah's solid economic growth is in part a result of strong partnerships between local communities, the state, and private industry. Looking into next year, it is expected Utah's economy will continue to grow.[3]

2014 Summary

Job Growth

Quality professional and information jobs have increased substantially in the last year largely due to the success of those Utah businesses already located in the state as well as those relocating or expanding their presence. In the last year information jobs increased 7.3 percent.[4] Construction jobs have rebounded back with double digit 11.2 percent.[5] Both Economic Development Corporation of Utah and the Governor's Office of Economic Development worked together to support 37 companies who announced decisions to either relocate or expand in Utah, adding 8,326 jobs to the state's economy and retaining another 733 jobs during the 2014 fiscal year. This represents capital investments in Utah totaling more than $677.5 million.[6]

Major Projects

Notable expansions or relocations during the past year include: Allstate/Esurance with 650 jobs in Ogden; Varian Medical with 1,000 jobs in Salt Lake City; Cabela's with 600 jobs in Tooele County; Environmental Stoneworks with 124 jobs in St. George; and Oracle with 351 jobs in the state.[7] In addition to businesses expanding or relocating in Utah, infrastructure projects continue to enhance business development opportunities. The FrontLines 2015 program led by the Utah Transit Authority (UTA) added 70 miles to UTA's existing 64-mile rail network, providing all Wasatch Front residents with enhanced mobility and decreased traffic congestion on roads.[8] In addition, Salt Lake City is undergoing an eight-year, $1.8 billion makeover of its airport that is expected to pump $3.3 billion into the state's economy.[9]

Business Climate

Utah has been able to attract economic growth for several reasons; Utah's young and educated workforce continues to grow, state and local governments are fiscally responsible and stable, and the cost of doing business remains low. Additionally, Utah's transportation infrastructure is one of the best in the country.[10] Utah continues to receive recognition as a leading global business destination, enjoying significant accolades from the national media and organizations like CNBC, which ranked Utah third on its list of Top States for Business.[11]

Trends

According to GOED, Utah's six strategic industry clusters accounted for 187,281 jobs as of Q4 2013, up from 178,259 jobs the previous year demonstrating a growth rate of 5.1 percent. Utah's economic clusters include: aerospace and defense, energy and natural resources, financial services, life sciences, outdoor products, and software development/ information technology.[12] One industry that has seen considerable growth over the last year is the IT sector. The IT sector is maturing in Utah and many of the companies considering a move are in this sector.[13] 2014 was a record year for technology investments in Utah, for a total of $690.8 million by the third quarter, crushing the prior record of $565.5 million in 2000, according to data reported by Dow Jones VentureSource.[14]

Significant Issues

Education

Utah's school age population is projected to grow more than 14 percent from 2012 to 2020; in addition to growth, low standardized test scores and college readiness are detracting from Utah's advantage as being among the most highly-educated states in the nation.[15] Thus, Utah's 5-Year Plan for

1. Utah Department of Workforce Services. (2014). Employment Update. Retrieved November 3, 2014. https://jobs.utah.gov/wi/pubs/une/
2. Bureau of Labor Statistics. (November 3, 2014). State and Area Employment, Hours and Earnings. Retrieved November 3, 2014.
3. Economic Development Corporation of Utah (2014). 2013/14 Annual Report. Partnerships with State and Local Governments, 3.
4. Utah Department of Workforce Services. (2014, August). Utah Nonagricultural Jobs by Industry and Components of the Labor Force. Retrieved October 16, 2014
5. Ibid
6. Economic Development Corporation of Utah (2014). 2013/14 Annual Report. From our President and Chairman, 2
7. Economic Development Corporation of Utah (2014). 2013/14 Annual Report. Another Record Year for Jobs Created and Retained, 2.
8. Utah Transit Authority (2014). FrontLines 2015 Homepage. Accessed October 30, 2014. http://www.rideuta.com/mc/?page=Projects-Frontlines2015
9. Forbes (2014). Best Places for Business 2014. Retrieved October 30, 2014. www.forbes.com
10. Economic Development Corporation of Utah (2014). 2013/14 Annual Report. From our President and Chairman,
11. Ibid
12. Utah Governor's Office of Economic Development (2014). 2014 Annual Report and Business Resource Guide. Overview, 9.
13. Economic Development Corporation of Utah (2014). 2013/14 Annual Report. Another Record Year for Jobs Created and Retained, 2.
14. Forbes (September 9, 2014). Utah Technology Investments Achieve New Records in 2014. Retrieved October 30, 2014. http://www.forbes.com/sites/cherylsnappconner/2014/09/25/utah-technology-investments-achieve-new-records-in-2014/
15. Education First Utah (2014). Stats and Info. Retrieved October 30, 2014. http://educationfirstutah.org/stats-and-info/

Education is addressing these challenges through a number of targeted initiatives that will ensure quality education for Utah's workforce and continued economic growth for the state.[16]

Business Cost

Utah remains competitive nationally, with three "best" cities in Utah (Provo #3, Salt Lake City #8, Ogden #11) on the Best and Worst Places for Business in 2014 ranking by Forbes. The favorable rankings reflect high job growth (Provo was the top in the USA in 2013 at 5.3 percent), low business costs (fourth lowest in the U.S. at 24 percent below the national average in Ogden), and high levels of high school attainment (over 93 percent of adults possessing a degree in Utah).[17] Utah also ranked first place on The Pollina Corporate Top 10 Pro-Business States for 2014 for the third year in a row; factors that contributed to the ranking include a stable regulatory environment, low unemployment, ease of starting a business, low operation costs, a well-educated workforce and high quality of life.[18]

2015 Outlook

The landscape is looking positive for Utah in 2015, with expectations that the state's economy will speed up even faster this coming year. According to a Chase JP Morgan report, Utah is recovering considerably faster than the national economy. Because of Utah's diverse mix of industries, Utah's economy is expected to mirror the trends in the national economy, with the exceptions of construction durable manufacturing, retail and finance representing a slightly heavier footprint in Utah than in the national landscape.[19] Utah's potential for growth is sustainable, given that Utah has the fourth most diverse economy in the U.S., according to a recent University of Utah "Hachman Index." In regards to the housing market, Utah is poised for continued economic recovery and vitality, with prices in Utah expected to increase by 17 percent between 2012 and 2018, with the Salt Lake City metro area potentially rising by 21 percent. This growth indicates that Utah is experiencing a steady improvement indicating a sustainable housing recovery now and into the future.[20]

Conclusion

Throughout 2014, Utah continued to prosper and grow. All economic development indicators point towards another strong year in 2015. With the addition of 46,300 jobs in the state in 2014, competitive national business rankings, significant IT sector growth and investment, and infrastructure expansions such as TRAX and Salt Lake City International Airport upgrades, the future of Utah is looking bright for economic development.

16. Education First Utah (2014). 5 Year Plan. Retrieved October 30, 2014. http://educationfirstutah.org/5-year-plan/
17. Forbes (2014). Best and Worst Places for Business 2014. Retrieved October 30, 2014. http://www.forbes.com/pictures/mli45ekdjf/best-and-worst-places-for-business-2014-2/
18. American Economic Development Institute (2014). AEDI/Pollina Corporate Top 10 Pro-Business Study for 2014. Retrieved November 3, 2014. http://www.aedi.us/top-business-states-2014/
19. Chase JP Morgan (June 3, 2014). Regional Perspectives: Utah Economic Outlook. Retrieved October 30, 2014. https://www.chase.com/content/dam/chasecom/en/commercial-bank/documents/utah-economy.pdf
20. Zions Bank (April 2014). The Current: Real Time Indicators of Utah's Economic Outlook. Retrieved October 30, 2014. https://www.zionsbank.com/about-zions-bank/economic-outlook/pdfs/1403-098-the-current-utah-apr-digital-v4.pdf

Public Education

In fall 2014, there were 622,182 students in Utah's public education system, an increase of 9,631 students (1.6 percent) over 2013. Students were served in over 1,000 brick-and-mortar and/or virtual schools. In FY2011, the most recent year for which by-state figures are available, Utah's current expenditure per pupil was $6,326, the nation's lowest, where it has ranked 51st for many years. Nevertheless, the system continually evolves to better prepare its students for the future.

Enrollment
Utah's student enrollment growth has been moderate for several years. Enrollment grew by 9,631 students between 2013 and 2014, a 1.6 percent increase. Growth in student enrollment is expected for several years, as Utah continues to experience net in-migration and the nation's highest birth rate and fertility rate.

The growth in total student enrollment occurred in spite of a smaller incoming kindergarten class. For the first time in many years, the incoming kindergarten class was smaller than the previous year, down 1,495 students. This corresponds to a declining number of total births (-990) five years prior. Based on births, the declining kindergarten size is expected to continue until 2017.

Although Utah's student population is primarily white (92.1 percent), it is becoming slightly more diverse. In fall 2014, 16.3 percent of Utah's student body was Hispanic or Latino, 2.7 percent was Asian, 2.2 percent was Pacific Islander, 3.2 percent was American Indian and Alaska Native, and 2.2 percent was Black or African American.

Finances
In FY2011, Utah's current expenditure per pupil was $6,326, the nation's lowest (51st), a position the state has held for many years. Utah's public education finances are heavily influenced by its demographics: it has had the highest number of school-age children per working-age person for many years. In 2013 the Dependency Ratio was 37.4. One consequence of low per-pupil expenditure is a high number of pupils per teacher. Utah has the nation's highest at 22.8. Some consider Utah's effort to fund public education to be better reflected by its total current education expenditure as a percent of total personal income which is 3.9 percent and ranks Utah 31st.

Positively impacting Utah's public education system are the economies of scale of a highly urbanized population, household income, parents' education, and teacher qualifications. In 2013, Utah's median household income of $59,770 ranked 12th in the nation and above the national median; Utah ranked 15th in the percent of people 25 years of age and over with bachelor's degrees at 31.3 percent and ninth in the percent of people with high school diplomas at 91.5 percent. In FY2012, Utah ranked eighth highest in the number of teachers who are education specialists, meaning those who have completed one year or more of work beyond master's degree level.

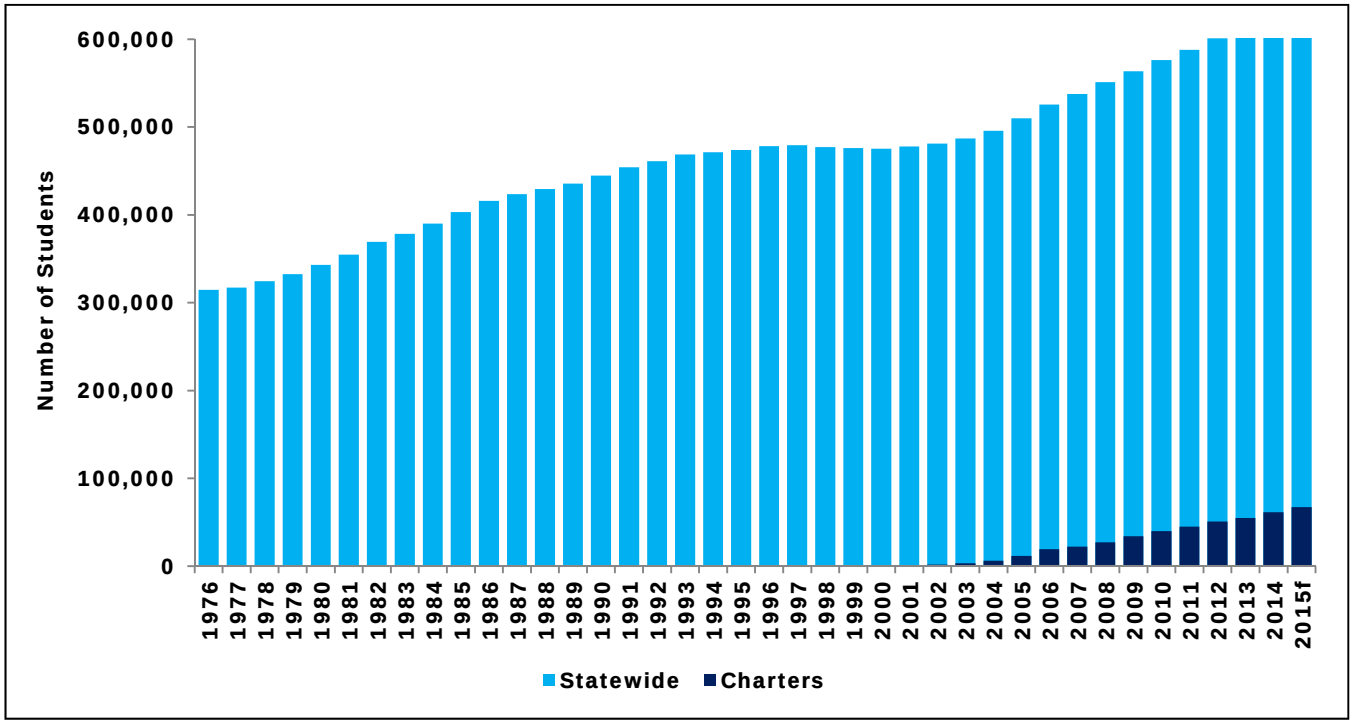
Achievement
In 2014, Utah ranked 31st in the nation with an ACT Average Composite Score of 20.8. Utah is one of only a dozen states in the country where 100 percent of high school graduates are tested. The ACT is a national college admissions examination that consists of subject area tests in English, Mathematics, Reading, and Science. ACT results are accepted by all four-year colleges and universities in the nation.

Fewer Utah public school students took the SAT college entrance exam in 2014, resulting in an 8.1 percent decrease in participation from the previous year. Utah SAT participation is waning as all students now take the ACT exam. In spite of this decrease in SAT participation, Utah's average scores increased in reading, math and writing; the mean scores in reading were up four points, math mean scores up seven points, and writing mean scores up four points. Comparative national scores showed reading as flat, math down two points, and writing also down two points.

A total of 21,774 Utah public school students took Advanced Placement (AP) Exams in 2014, representing a 5 percent increase over the participation rate in 2013. In 2014, 67 percent of Utah public school students scored a three, four, or five on the AP exams to earn college credit, compared to the national rate of 57 percent.

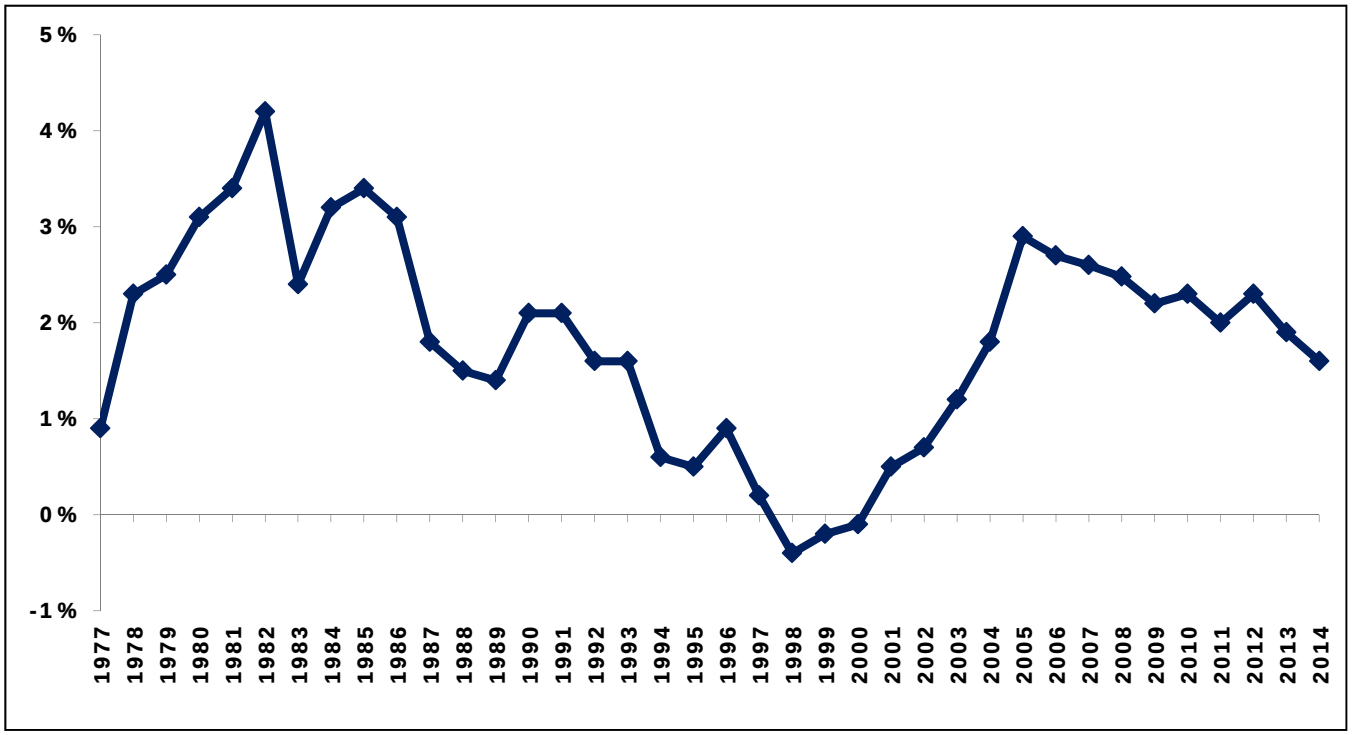
Charter Schools
Charter schools operate independently of school districts, with the exception of a few that are district-operated. They receive public funds and must adhere to federal and state laws as well as administrative rules for the use of those funds and for the operation of programs. The educational purposes of each vary. For example, Tuacahn High School near St. George offers arts programs, while the curriculum at the Academy of Math, Engineering, and Science in Salt Lake is geared toward college preparation. FY2000 was the first year that charter schools operated within the state. That year, eight schools opened with 390 students enrolled. In 2013-14, 100 charter schools educated 61,464 students, about 9.9 percent of all Utah students in public schools.

Figure 15.1
Utah Public Education Enrollment



Source: Utah State Office of Education, Finance and Statistics

Figure 15.2
Percent Change in Public Education Enrollment



Source: Utah State Office of Education, Finance and Statistics

Figure 15.3
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%	2,774,424	42,864	1.6%	20.8%
2011	587,745	11,410	2.0%	2,814,784	40,360	1.5%	20.9%
2012	600,985	13,240	2.3%	2,854,871	40,087	1.4%	21.1%
2013	612,551	11,566	1.9%	2,900,872	46,001	1.6%	21.1%
2014e	622,182	9,631	1.6%	2,949,213	48,341	1.7%	21.1%
2015f	630,104	7,922	1.3%	2,998,590	49,377	1.7%	21.0%

e = estimate f = forecast

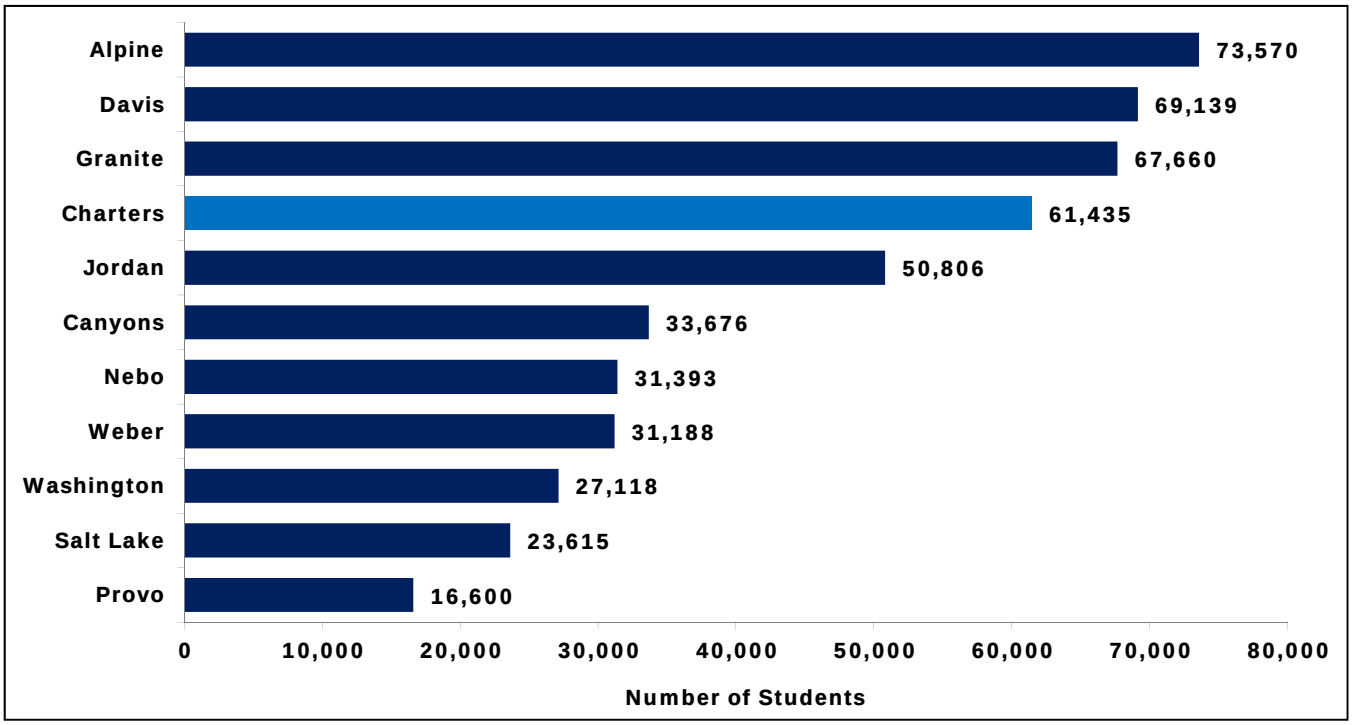
Sources:
1. Utah State Office of Education, School Enrollment Counts
2. Interagency Common Data Committee (county-level single-year enrollment projections model), October 2014

Figure 15.4
Fall Enrollment by District

District	2011	2012	2013	2014	2015f	Total Annual Change 2011-12	2012-13	2013-14	2014-15f	Percent Change 2011-12	2012-13	2013-14	2014-15f	2015 Rank Size	Total Change	Percent Change
Alpine	68,233	70,811	72,419	73,570	75,002	2,578	1,608	1,151	1,432	3.8%	2.3%	1.6%	1.9%	1	2	7
Beaver	1,540	1,544	1,579	1,516	1,474	4	35	-63	-42	0.3%	2.3%	-4.0%	-2.8%	34	33	38
Box Elder	11,273	11,001	11,131	11,238	11,255	-272	130	107	17	-2.4%	1.2%	1.0%	0.2%	15	21	25
Cache	15,605	15,890	16,038	16,457	16,658	285	148	419	201	1.8%	0.9%	2.6%	1.2%	12	7	12
Canyons	33,490	33,528	33,674	33,676	33,812	38	146	2	136	0.1%	0.4%	0.0%	0.4%	6	10	21
Carbon	3,423	3,435	3,369	3,384	3,337	12	-66	15	-47	0.4%	-1.9%	0.4%	-1.4%	24	34	30
Daggett	169	181	194	174	155	12	13	-20	-19	7.1%	7.2%	-10.3%	-10.9%	42	30	42
Davis	67,736	68,342	68,573	69,139	69,162	606	231	566	23	0.9%	0.3%	0.8%	0.0%	2	20	26
Duchesne	4,574	4,829	5,021	5,170	5,255	255	192	149	85	5.6%	4.0%	3.0%	1.6%	21	12	9
Emery	2,313	2,311	2,310	2,281	2,225	-2	-1	-29	-56	-0.1%	0.0%	-1.3%	-2.5%	31	36	35
Garfield	927	948	930	926	932	21	-18	-4	6	2.3%	-1.9%	-0.4%	0.6%	37	24	18
Grand	1,467	1,441	1,455	1,456	1,515	-26	14	1	59	-1.8%	1.0%	0.1%	4.1%	33	16	2
Granite	67,736	67,600	68,106	67,660	67,485	-136	506	-446	-175	-0.2%	0.7%	-0.7%	-0.3%	3	39	27
Iron	8,508	8,519	8,685	8,814	9,034	11	166	129	220	0.1%	1.9%	1.5%	2.5%	16	6	5
Jordan	50,581	52,043	52,855	51,806	50,977	1,462	812	-1,049	-829	2.9%	1.6%	-2.0%	-1.6%	5	42	32
Juab	2,297	2,283	2,287	2,322	2,311	-14	4	35	-11	-0.6%	0.2%	1.5%	-0.5%	30	27	28
Kane	1,175	1,209	1,212	1,193	1,171	34	3	-19	-22	2.9%	0.2%	-1.6%	-1.8%	35	31	34
Logan	6,120	6,063	5,987	5,965	6,041	-57	-76	-22	76	-0.9%	-1.3%	-0.4%	1.3%	20	14	10
Millard	2,815	2,782	2,841	2,852	2,773	-33	59	11	-79	-1.2%	2.1%	0.4%	-2.8%	28	38	37
Morgan	2,421	2,531	2,632	2,766	2,837	110	101	134	71	4.5%	4.0%	5.1%	2.6%	27	15	4
Murray	6,417	6,428	6,435	6,415	6,440	11	7	-20	25	0.2%	0.1%	-0.3%	0.4%	18	19	22
Nebo	29,724	30,494	31,230	31,393	32,087	770	736	163	694	2.6%	2.4%	0.5%	2.2%	7	3	6
North Sanpete	2,420	2,377	2,408	2,385	2,346	-43	31	-23	-39	-1.8%	1.3%	-1.0%	-1.6%	29	32	33
North Summit	983	977	990	1,004	1,013	-6	13	14	9	-0.6%	1.3%	1.4%	0.9%	36	23	15
Ogden	12,652	12,570	12,489	12,350	11,851	-82	-81	-139	-499	-0.6%	-0.6%	-1.1%	-4.0%	14	41	39
Park City	4,400	4,421	4,630	4,739	4,778	21	209	109	39	0.5%	4.7%	2.4%	0.8%	22	17	16
Piute	317	308	304	302	286	-9	-4	-2	-16	-2.8%	-1.3%	-0.7%	-5.3%	40	29	41
Provo	13,779	14,202	14,799	16,600	16,892	423	597	1,801	292	3.1%	4.2%	12.2%	1.8%	11	5	8
Rich	491	481	479	478	481	-10	-2	-1	3	-2.0%	-0.4%	-0.2%	0.6%	38	25	19
Salt Lake	23,919	23,759	23,965	23,615	23,752	-160	206	-350	137	-0.7%	0.9%	-1.5%	0.6%	10	9	20
San Juan	2,922	3,064	3,020	3,022	3,050	142	-44	2	28	4.9%	-1.4%	0.1%	0.9%	26	18	14
Sevier	4,546	4,629	4,585	4,609	4,551	83	-44	24	-58	1.8%	-1.0%	0.5%	-1.3%	23	37	29
South Sanpete	3,124	3,189	3,162	3,140	3,092	65	-27	-22	-48	2.1%	-0.8%	-0.7%	-1.5%	25	35	31
South Summit	1,457	1,468	1,495	1,510	1,524	11	27	15	14	0.8%	1.8%	1.0%	0.9%	32	22	13
Tintic	210	228	250	259	260	18	22	9	1	8.6%	9.6%	3.6%	0.4%	41	26	23
Tooele	13,675	14,034	14,107	13,873	13,970	359	73	-234	97	2.6%	0.5%	-1.7%	0.7%	13	11	17
Uintah	6,993	7,291	7,591	7,912	7,565	298	300	321	-347	4.3%	4.1%	4.2%	-4.4%	17	40	40
Wasatch	5,253	5,585	5,786	5,959	6,143	332	201	173	184	6.3%	3.6%	3.0%	3.1%	19	8	3
Washington	26,206	26,131	27,099	27,118	27,463	-75	968	19	345	-0.3%	3.7%	0.1%	1.3%	9	4	11
Wayne	539	525	501	482	470	-14	-24	-19	-12	-2.6%	-4.6%	-3.8%	-2.5%	39	28	36
Weber	30,423	30,732	31,028	31,188	31,269	309	296	160	81	1.0%	1.0%	0.5%	0.3%	8	13	24
Charter Schools	44,892	50,801	54,900	61,464	67,410	5,909	4,099	6,564	5,946	13.2%	8.1%	12.0%	9.7%	4	1	1
State of Utah	587,745	600,985	612,551	622,182	630,104	13,240	11,566	9,631	7,922	2.3%	1.9%	1.6%	1.3%			

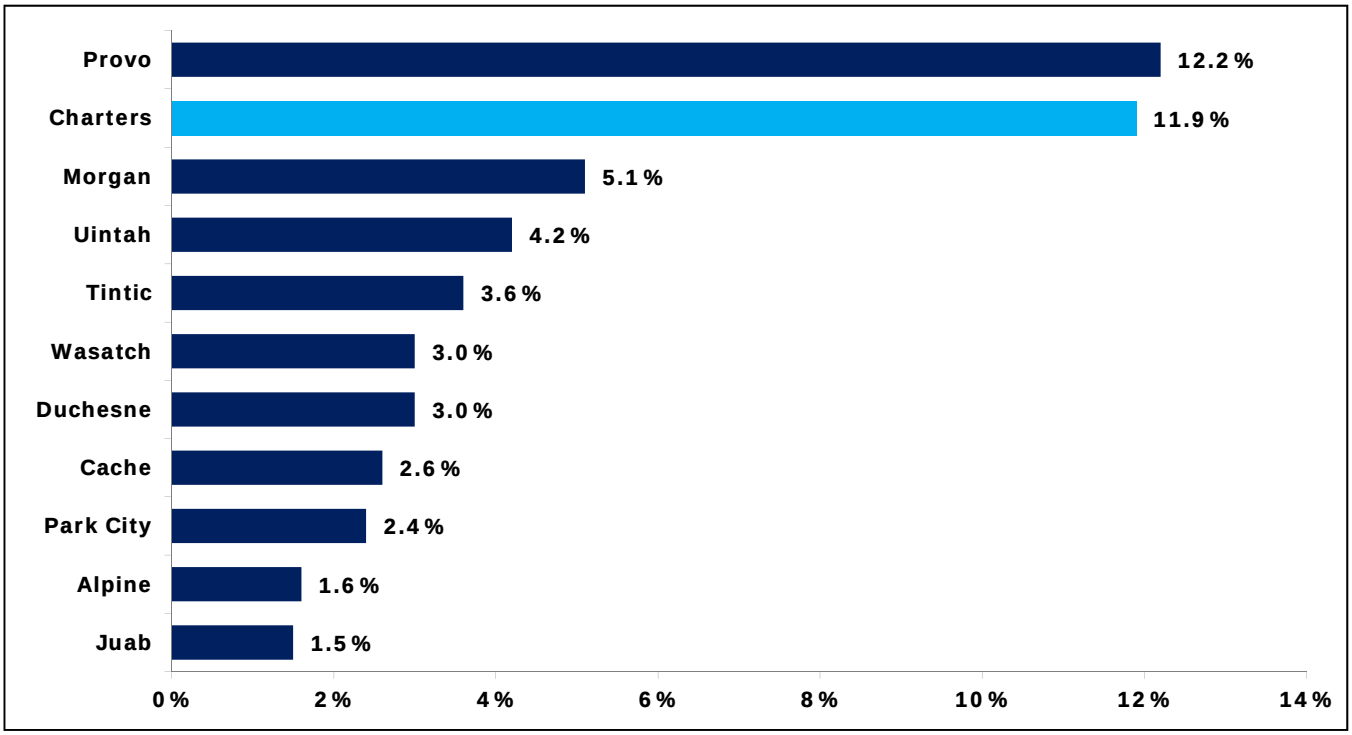
Source: Utah State Office of Education

Figure 15.5
Largest Enrollment in Utah: 2014



Source: Utah State Office of Education, Finance and Statistics

Figure 15.6
Fastest Growing Enrollment in Utah from 2013 to 2014



Source: Utah State Office of Education, Finance and Statistics

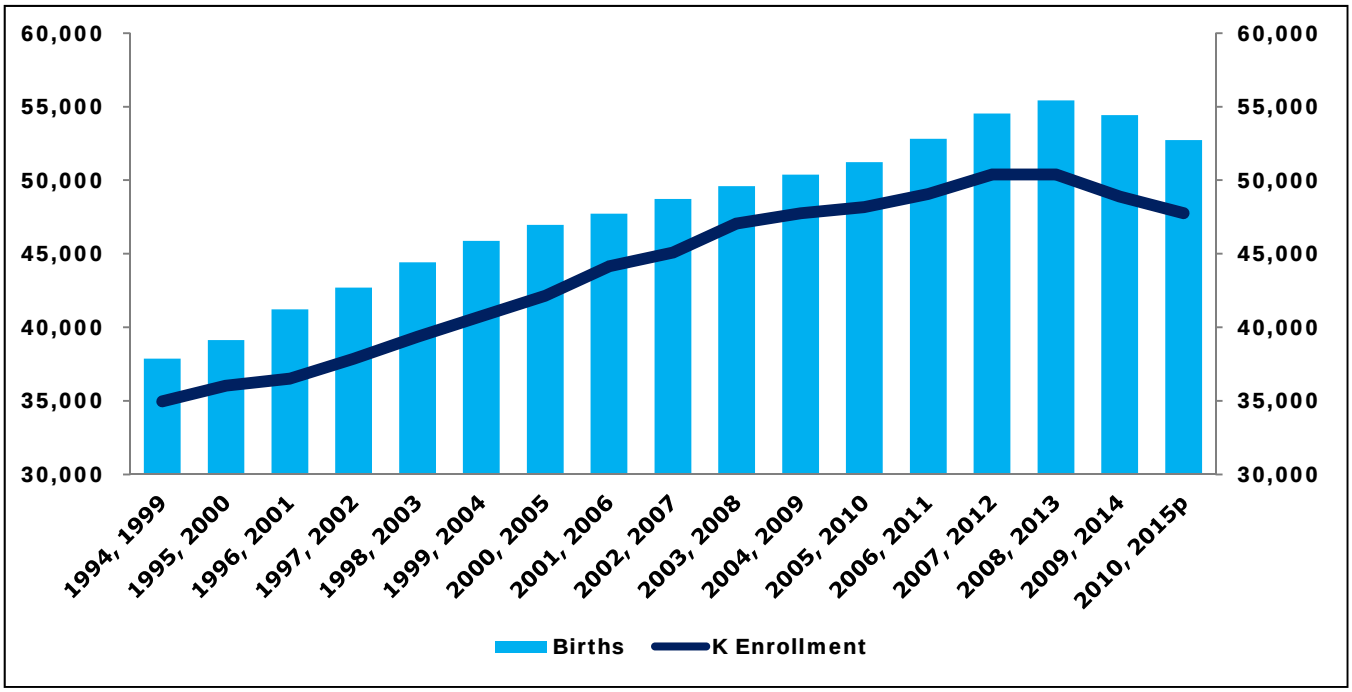
Figure 15.7
Utah Public Education Enrollment by Race and Ethnicity

District	2014 Total Student	African American or Black		American Indian		Asian		Hispanic/ Latino		Pacific Islander		White	
		Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Alpine	73,570	1,077	1.5%	1,249	1.7%	1,614	2.2%	7,321	10.0%	1,548	2.1%	70,560	95.9%
Beaver	1,516	3	0.2%	13	0.9%	14	0.9%	196	12.9%	6	0.4%	1,490	98.3%
Box Elder	11,238	128	1.1%	133	1.2%	111	1.0%	1,095	9.7%	73	0.6%	10,948	97.4%
Cache	16,457	154	0.9%	1,251	7.6%	194	1.2%	1,402	8.5%	136	0.8%	15,067	91.6%
Canyons	33,676	898	2.7%	1,271	3.8%	1,528	4.5%	5,004	14.9%	806	2.4%	31,216	92.7%
Carbon	3,384	27	0.8%	45	1.3%	14	0.4%	453	13.4%	9	0.3%	3,317	98.0%
Daggett	174	3	1.7%	6	3.4%	1	0.6%	8	4.6%	0	0.0%	172	98.9%
Davis	69,139	1,507	2.2%	940	1.4%	1,670	2.4%	6,285	9.1%	1,278	1.8%	64,760	93.7%
Duchesne	5,170	35	0.7%	306	5.9%	26	0.5%	316	6.1%	44	0.9%	4,873	94.3%
Emery	2,281	16	0.7%	21	0.9%	6	0.3%	165	7.2%	9	0.4%	2,243	98.3%
Garfield	926	3	0.3%	32	3.5%	3	0.3%	44	4.8%	1	0.1%	888	95.9%
Grand	1,456	15	1.0%	96	6.6%	14	1.0%	233	16.0%	5	0.3%	1,340	92.0%
Granite	67,660	2,525	3.7%	1,140	1.7%	3,005	4.4%	21,907	32.4%	2,707	4.0%	58,678	86.7%
Iron	8,814	102	1.2%	336	3.8%	102	1.2%	853	9.7%	91	1.0%	8,396	95.3%
Jordan	51,806	1,272	2.5%	2,474	4.8%	1,634	3.2%	7,015	13.5%	1,347	2.6%	47,394	91.5%
Juab	2,322	22	0.9%	73	3.1%	12	0.5%	75	3.2%	21	0.9%	2,235	96.3%
Kane	1,193	8	0.7%	24	2.0%	10	0.8%	42	3.5%	2	0.2%	1,161	97.3%
Logan	5,965	108	1.8%	125	2.1%	272	4.6%	1,589	26.6%	87	1.5%	5,480	91.9%
Millard	2,852	12	0.4%	45	1.6%	57	2.0%	459	16.1%	12	0.4%	2,779	97.4%
Morgan	2,766	17	0.6%	8	0.3%	9	0.3%	77	2.8%	17	0.6%	2,732	98.8%
Murray	6,415	354	5.5%	110	1.7%	226	3.5%	1,078	16.8%	125	1.9%	5,897	91.9%
Nebo	31,393	310	1.0%	246	0.8%	291	0.9%	3,262	10.4%	443	1.4%	30,651	97.6%
North Sanpete	2,385	20	0.8%	58	2.4%	16	0.7%	338	14.2%	12	0.5%	2,325	97.5%
North Summit	1,004	7	0.7%	118	11.8%	7	0.7%	115	11.5%	7	0.7%	899	89.5%
Ogden	12,350	424	3.4%	658	5.3%	167	1.4%	6,274	50.8%	110	0.9%	11,439	92.6%
Park City	4,739	35	0.7%	193	4.1%	125	2.6%	954	20.1%	22	0.5%	3,928	82.9%
Piute	302	5	1.7%	3	1.0%	1	0.3%	41	13.6%	0	0.0%	295	97.7%
Provo	16,600	267	1.6%	249	1.5%	484	2.9%	4,094	24.7%	652	3.9%	15,352	92.5%
Rich	478	1	0.2%	7	1.5%	0	0.0%	24	5.0%	1	0.2%	475	99.4%
Salt Lake	23,615	1,450	6.1%	3,433	14.5%	1,449	6.1%	9,727	41.2%	1,389	5.9%	16,936	71.7%
San Juan	3,022	17	0.6%	1,682	55.7%	9	0.3%	127	4.2%	11	0.4%	1,346	44.5%
Sevier	4,609	33	0.7%	81	1.8%	20	0.4%	231	5.0%	23	0.5%	4,452	96.6%
South Sanpete	3,140	37	1.2%	49	1.6%	16	0.5%	337	10.7%	32	1.0%	3,051	97.2%
South Summit	1,510	7	0.5%	20	1.3%	5	0.3%	174	11.5%	2	0.1%	1,495	99.0%
Tintic	259	2	0.8%	0	0.0%	0	0.0%	12	4.6%	0	0.0%	259	100.0%
Tooele	13,873	238	1.7%	222	1.6%	180	1.3%	1,852	13.3%	206	1.5%	13,401	96.6%
Uintah	7,912	63	0.8%	668	8.4%	62	0.8%	675	8.5%	72	0.9%	7,185	90.8%
Wasatch	5,959	39	0.7%	20	0.3%	54	0.9%	1,027	17.2%	21	0.4%	5,867	98.5%
Washington	27,118	359	1.3%	604	2.2%	287	1.1%	3,566	13.1%	574	2.1%	25,682	94.7%
Wayne	482	1	0.2%	4	0.8%	6	1.2%	19	3.9%	6	1.2%	473	98.1%
Weber	31,188	643	2.1%	1,156	3.7%	668	2.1%	3,769	12.1%	342	1.1%	28,210	90.5%
Charter	61,435	1,511	2.5%	817	1.3%	2,144	3.5%	9,197	15.0%	1,488	2.4%	57,436	93.5%
State of Utah	622,153	13,755	2.2%	19,986	3.2%	16,513	2.7%	101,432	16.3%	13,737	2.2%	572,783	92.1%

Note: Totals may not sum due to undeclared race/ethnicity. Percentages do not necessarily sum to 100 because students may choose to indicate more than one race in addition to indicating whether or not they are Hispanic.

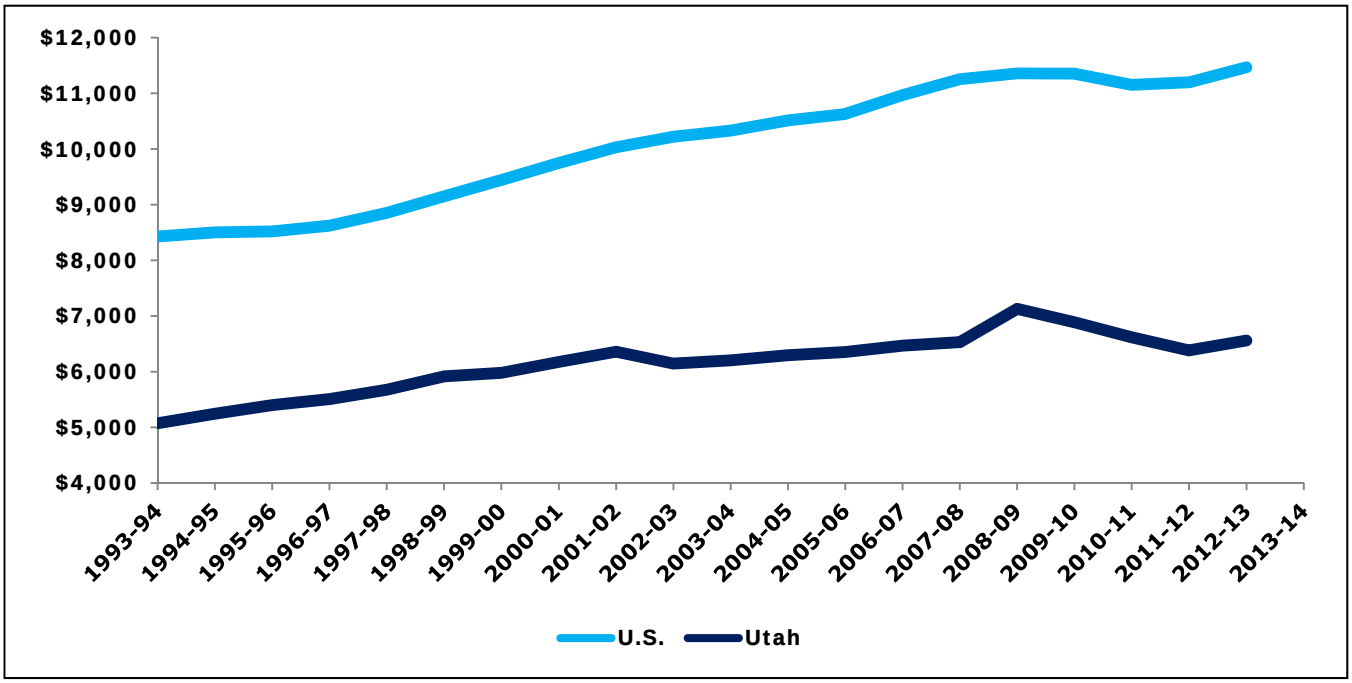
Source: Utah State Office of Education, Data & Statistics Section

Figure 15.8
Kindergarten Enrollment and Five Years Prior Births



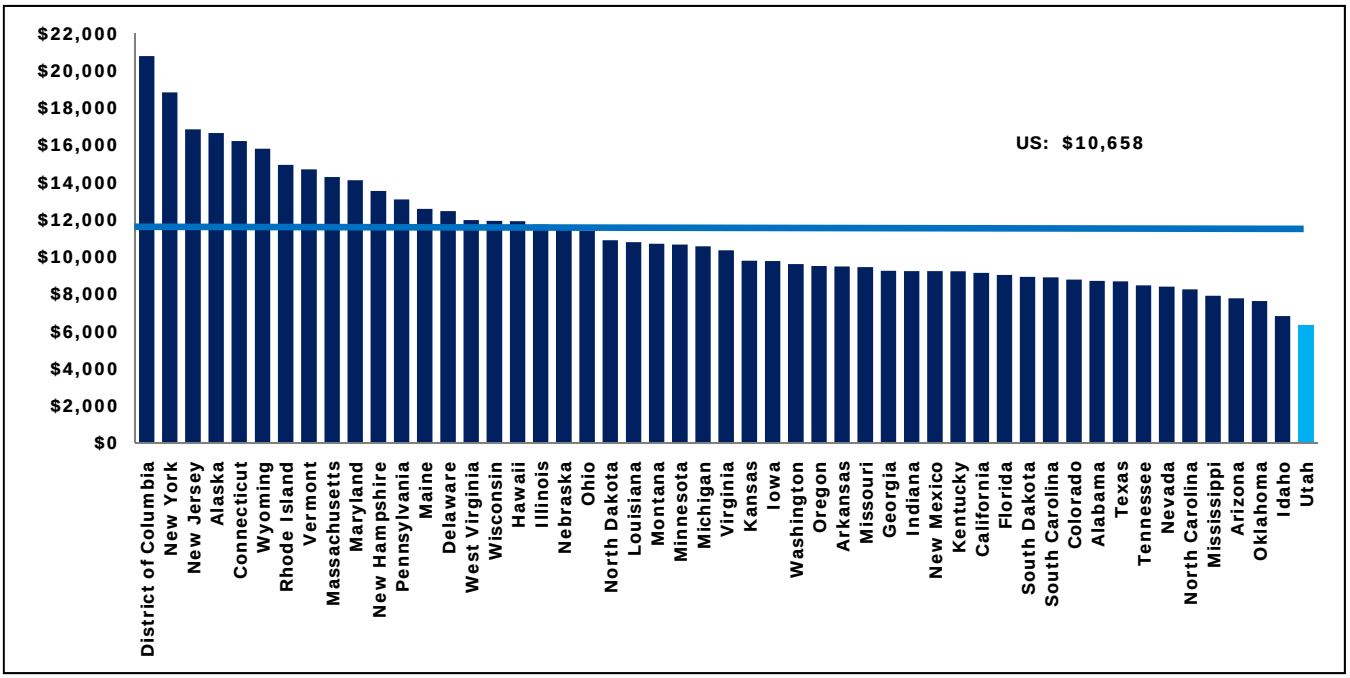
Note: Axis does not start at zero
Source: Utah State Office of Education, Finance and Statistics

Figure 15.9
FY 1994-2014 United States and Utah per Pupil Current Expenditures



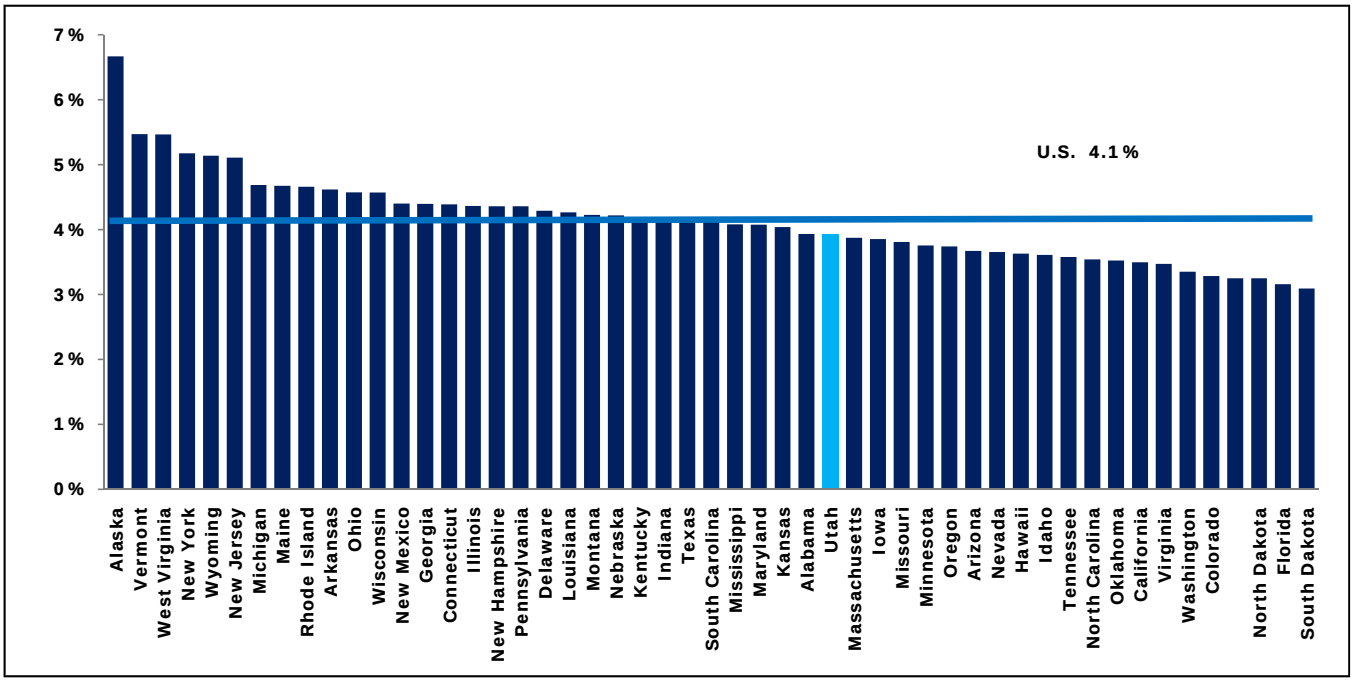
Notes: Figures are adjusted for inflation using FY2013 CPI. Axis does not start at zero.
Source: USOE, School Finance, US Department of Education, National Center for Education Statistics, and the Bureau of Labor Statistics

Figure 15.10
FY 2011 Current Expenditures per Pupil



Note: Figures are adjusted for inflation using FY2014 CPI
Source: USOE, School Finance, US Department of Education, National Center for Education Statistics, and the Bureau of Labor Statistics

Figure 15.11
FY 2011 Current Expenditures as a Percent of Personal Income



Note: Figures are adjusted for inflation using FY2014 CPI
Source: USOE, School Finance, US Department of Education, National Center for Education Statistics, and the Bureau of Labor Statistics

Figure 15.12
FY 2013 Statewide Selected Data

District	FY2013 Per Student Current Expenditures	Rank	Class of 2013 Graduation Rate	Rank	FY2013 Pupil-Teacher Ratio	Rank	School Meal Applications At or below 185% of the Poverty Level	Percent of District Enrollment	Rank
State of Utah	$6,561	-	81%	-	22.2	-	221,504	36.7%	-
Alpine	5,804	39	87%	20	23.5	4	18,956	26.2%	36
Beaver	8,215	18	85%	23	20.4	23	740	46.8%	17
Box Elder	6,589	31	86%	21	22.6	9	4,468	40.3%	23
Cache	6,284	35	92%	10	24.0	1	5,166	32.4%	33
Canyons	6,821	26	83%	28	22.9	6	1,619	44.2%	20
Carbon	8,641	15	96%	3	19.1	29	72	36.5%	28
Daggett	17,100	1	100%	1	12.3	41	18,179	25.4%	37
Davis	6,269	36	89%	17	23.9	3	1,539	30.2%	34
Duchesne	7,101	21	85%	24	21.6	17	1,049	44.8%	18
Emery	9,847	9	93%	8	17.6	34	382	41.2%	22
Garfield	9,712	10	87%	19	16.9	36	725	49.8%	9
Grand	8,650	14	79%	36	16.9	35	35,449	49.7%	10
Granite	6,761	28	71%	39	21.7	15	4,576	49.0%	12
Iron	6,787	27	80%	34	21.4	18	12,368	23.2%	38
Jordan	5,645	40	84%	27	24.0	2	847	37.0%	27
Juab	6,555	32	93%	7	22.4	10	576	48.0%	15
Kane	10,258	7	95%	4	18.0	32	1,582	44.7%	19
Logan	6,735	29	81%	32	21.9	13	383	14.4%	41
Millard	9,542	11	90%	13	20.0	27	11,596	36.2%	29
Morgan	5,971	38	93%	5	22.7	8	1,245	55.5%	6
Murray	6,726	30	84%	26	22.0	12	366	39.6%	24
Nebo	6,156	37	91%	11	23.5	5	1,013	21.3%	40
No. Sanpete	DNR	-	79%	35	20.6	22	242	73.8%	2
No. Summit	9,010	12	89%	15	18.7	30	242	50.2%	8
Ogden	8,040	19	69%	40	20.6	21	2,166	69.4%	3
Park City	10,968	5	88%	18	18.0	31	2,262	48.5%	13
Piute	13,623	3	89%	14	12.7	39	1,606	53.6%	7
Provo	6,910	25	69%	41	21.6	16	346	22.9%	39
Rich	13,014	4	93%	6	14.0	38	108	48.4%	14
Salt Lake	8,763	13	73%	38	20.4	24	5,405	37.5%	25
San Juan	10,663	6	83%	29	17.6	33	2,489	35.9%	30
Sevier	6,968	23	82%	30	21.8	14	1,822	33.6%	31
So. Sanpete	8,294	16	84%	25	20.9	20	12,926	41.5%	21
So. Summit	8,241	17	89%	16	19.4	28	262	49.2%	11
Tintic	14,401	2	80%	33	12.3	40	10,935	37.1%	26
Tooele	6,429	33	92%	9	21.3	19	15,232	59.0%	4
Uintah	6,936	24	75%	37	22.8	7	9,453	75.4%	1
Wasatch	7,509	20	90%	12	20.2	26	6,735	47.9%	16
Washington	6,976	22	85%	22	20.3	25	3,489	58.3%	5
Wayne	9,938	8	97%	2	14.6	37	2,137	32.6%	32
Weber	6,352	34	82%	31	22.1	11	10,095	30.1%	35
Charter Schools	5,541	-	33%-100%	-	21.1	-	10,637	36.7%	-

Source: Utah State Office of Education, Superintendent's Annual Report

Figure 15.13
College Entrance Exam Scores

Average ACT Scores by State: 2014

State	% of Graduates Tested	Average English Score	Average Math Score	Average Reading Score	Average Science Score	Average Composite Score	Rank
Alabama	80	20.7	19.5	21.3	20.4	20.6	34
Alaska	37	19.9	21.1	21.6	20.8	21.0	28
Arizona	55	18.8	20.2	20.0	19.5	19.7	46
Arkansas	93	20.1	19.9	20.8	20.3	20.4	39
California	29	21.8	22.8	22.3	21.7	22.3	16
Colorado	100	20.1	20.4	20.9	20.6	20.6	35
Connecticut	29	24.2	24.1	24.5	23.6	24.2	2
Delaware	18	22.7	23.2	23.7	22.9	23.2	6
District of Columbia	37	21.2	21.5	22.0	21.1	21.6	25
Florida	81	18.7	19.5	20.7	19.1	19.6	47
Georgia	53	20.3	20.5	21.4	20.7	20.8	30
Hawaii	90	16.9	19	18.3	18.1	18.2	51
Idaho	45	21.9	22	23.0	22.1	22.4	15
Illinois	100	20.3	20.7	20.8	20.5	20.7	32
Indiana	40	21.1	21.9	22.3	21.6	21.9	21
Iowa	68	21.5	21.4	22.5	22.2	22.0	18
Kansas	75	21.4	21.7	22.5	21.8	22.0	19
Kentucky	100	19.4	19.4	20.3	20	19.9	43
Louisiana	100	18.9	18.9	19.5	19.1	19.2	48
Maine	9	23.3	23.6	24.1	22.8	23.6	4
Maryland	22	22.1	22.5	23.0	22.2	22.6	14
Massachusetts	23	24.0	24.6	24.5	23.5	24.3	1
Michigan	100	19.3	19.9	20.2	20.4	20.1	41
Minnesota	76	22.1	23	23.1	22.9	22.9	10
Mississippi	100	18.8	18.3	19.4	18.9	19.0	49
Missouri	76	21.6	21.1	22.3	21.7	21.8	23
Montana	100	19.3	20.5	21.1	20.4	20.5	38
Nebraska	86	21.3	21.1	22.0	21.7	21.7	24
Nevada	36	20.2	21.2	21.7	21.1	21.2	27
New Hampshire	20	23.9	24.2	24.5	23.6	24.2	3
New Jersey	25	22.8	23.7	23.1	22.4	23.1	8
New Mexico	69	18.9	19.7	20.5	20.1	19.9	44
New York	27	22.7	23.8	23.6	23.2	23.4	5
North Carolina	100	17.5	19.6	19.0	18.9	18.9	50
North Dakota	100	19.6	20.7	20.8	20.6	20.6	36
Ohio	72	21.4	21.7	22.4	22	22.0	20
Oklahoma	75	20.3	19.9	21.5	20.8	20.7	33
Oregon	36	20.8	21.4	21.9	21.1	21.4	26
Pennsylvania	19	22.1	22.8	23.0	22.2	22.7	13
Rhode Island	16	22.7	22.8	23.6	22	22.9	11
South Carolina	58	19.7	20.3	20.9	20.4	20.4	40
South Dakota	78	21.0	21.8	22.3	22.1	21.9	22
Tennessee	100	19.6	19.2	20.1	19.6	19.8	45
Texas	40	19.8	21.4	21.1	21	20.9	29
Utah	**100**	**20.0**	**20.3**	**21.3**	**20.9**	**20.8**	**31**
Vermont	29	22.8	23	23.7	22.8	23.2	7
Virginia	28	22.4	22.7	23.4	22.4	22.8	12
Washington	22	22.3	23.3	23.4	22.7	23.0	9
West Virginia	65	20.4	19.5	21.4	20.6	20.6	37
Wisconsin	73	21.6	22	22.4	22.3	22.2	17
Wyoming	100	19.3	19.9	20.6	20.2	20.1	42
National	57	20.3	20.9	21.3	20.8	21.0	-

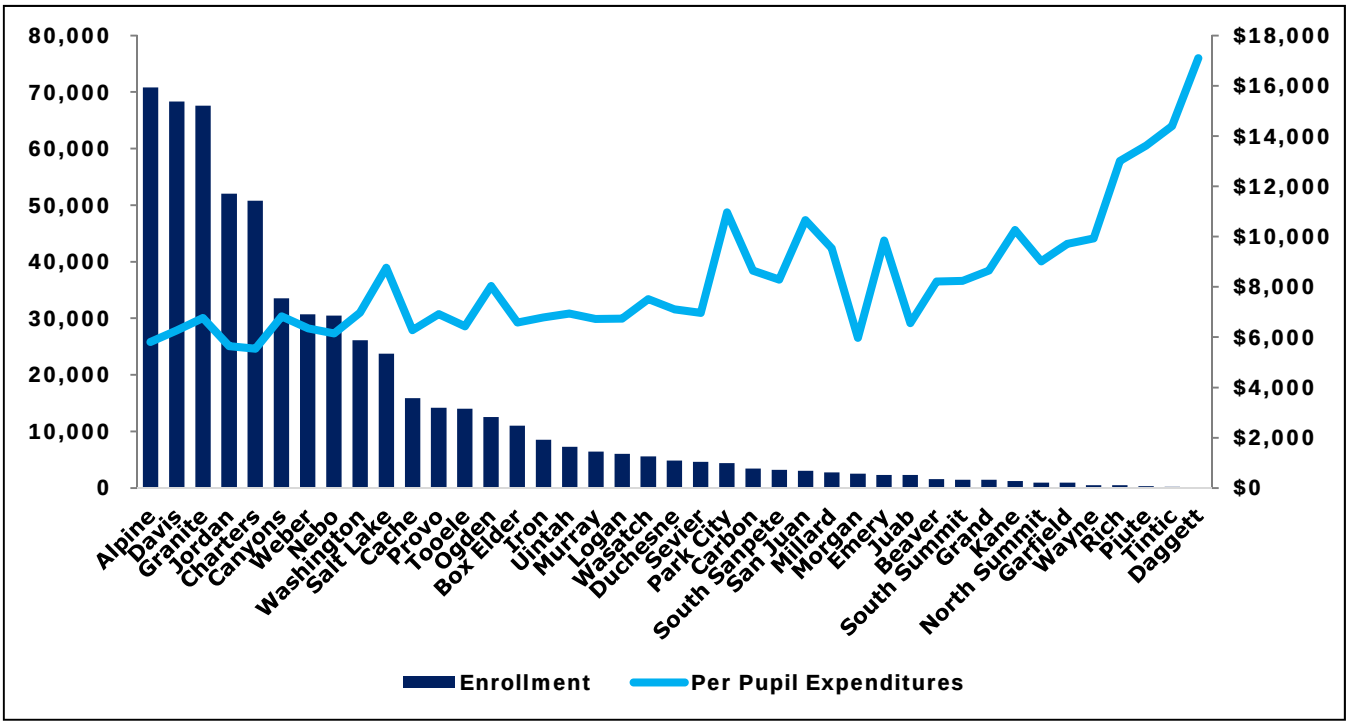
Source: ACT (http://www.act.org/newsroom/data/2014/states.html)

Figure 15.14
Selected Data by State

	October 2010 Enrollment	Current Expenditures (thousands)	Current Expenditures per Pupil	Rank	CY 2011 Total Personal Income (millions)	FY11 Current Exp. as a % of Personal Income	Rank	FY11 Pupil/ Teacher Ratio	Rank
United States	49,484,181	$527,166,106	$10,658	-	$12,949,905	4.1%	-	16.0	-
Alabama	755,552	6,592,925	8,726	42	167,517	3.9%	30	15.3	32
Alaska	132,104	2,201,270	16,663	4	33,003	6.7%	1	16.2	40
Arizona	1,071,751	8,340,211	7,782	48	227,287	3.7%	37	21.4	49
Arkansas	482,114	4,578,136	9,496	31	99,127	4.6%	10	14.1	19
California	6,289,578	57,526,835	9,146	37	1,645,138	3.5%	44	24.1	51
Colorado	843,316	7,409,462	8,786	41	225,410	3.3%	47	17.4	41
Connecticut	560,546	9,094,036	16,224	5	207,329	4.4%	15	13.1	10
Delaware	129,403	1,613,304	12,467	14	37,600	4.3%	19	14.5	22
District of Columbia	71,284	1,482,202	20,793	1	45,598	3.3%	48	12.0	3
Florida	2,643,347	23,870,090	9,030	38	755,358	3.2%	50	15.1	27
Georgia	1,677,067	15,527,907	9,259	33	353,142	4.4%	14	14.9	26
Hawaii	179,601	2,141,561	11,924	17	59,014	3.6%	39	15.8	34
Idaho	275,859	1,881,746	6,821	50	52,116	3.6%	40	17.6	42
Illinois	2,091,654	24,554,467	11,742	18	562,663	4.4%	16	15.7	33
Indiana	1,047,232	9,687,949	9,251	34	232,586	4.2%	24	18.0	45
Iowa	495,775	4,855,871	9,795	28	126,032	3.9%	33	14.3	20
Kansas	483,701	4,741,372	9,802	27	117,386	4.0%	29	14.0	18
Kentucky	673,128	6,211,453	9,228	36	148,510	4.2%	23	16.0	37
Louisiana	696,558	7,522,098	10,799	22	176,356	4.3%	20	14.3	21
Maine	189,077	2,377,878	12,576	13	50,869	4.7%	8	12.3	4
Maryland	852,211	12,035,719	14,123	10	295,235	4.1%	28	14.6	23
Massachusetts	955,563	13,649,965	14,285	9	352,243	3.9%	32	13.9	16
Michigan	1,587,067	16,786,444	10,577	25	358,152	4.7%	7	17.9	44
Minnesota	838,037	8,944,867	10,674	24	238,166	3.8%	35	15.9	35
Mississippi	490,526	3,887,981	7,926	47	95,313	4.1%	27	15.2	31
Missouri	918,710	8,691,887	9,461	32	228,218	3.8%	34	13.8	14
Montana	141,693	1,518,818	10,719	23	35,952	4.2%	21	13.7	13
Nebraska	298,500	3,298,536	11,540	19	78,220	4.2%	22	13.4	12
Nevada	437,149	3,676,997	8,411	45	100,665	3.7%	38	20.0	47
New Hampshire	194,711	2,637,911	13,548	11	60,481	4.4%	17	12.7	6
New Jersey	1,402,548	23,639,281	16,855	3	462,494	5.1%	6	12.7	7
New Mexico	338,122	3,127,463	9,250	35	71,073	4.4%	13	15.1	28
New York	2,734,955	51,509,285	18,834	2	995,185	5.2%	4	12.9	9
North Carolina	1,490,605	12,322,555	8,267	46	347,905	3.5%	42	15.2	30
North Dakota	96,323	1,049,772	10,898	21	32,306	3.2%	49	11.4	1
Ohio	1,754,191	19,988,921	11,395	20	436,818	4.6%	11	16.1	38
Oklahoma	659,911	5,036,031	7,631	49	142,862	3.5%	43	16.0	36
Oregon	570,720	5,430,888	9,516	30	145,300	3.7%	36	20.3	48
Pennsylvania	1,793,284	23,485,203	13,096	12	538,909	4.4%	18	13.8	15
Rhode Island	143,793	2,149,366	14,948	7	46,125	4.7%	9	12.8	8
South Carolina	725,838	6,461,884	8,903	40	156,231	4.1%	26	16.1	39
South Dakota	126,128	1,126,503	8,931	39	36,439	3.1%	51	13.3	11
Tennessee	987,422	8,377,599	8,484	44	234,154	3.6%	41	14.8	25
Texas	4,935,715	42,864,291	8,685	43	1,030,750	4.2%	25	14.7	24
Utah	585,552	3,704,133	6,326	51	94,401	3.9%	31	22.8	50
Vermont	96,858	1,424,507	14,707	8	26,042	5.5%	2	11.6	2
Virginia	1,251,440	12,968,457	10,363	26	373,312	3.5%	45	17.6	43
Washington	1,043,788	10,040,312	9,619	29	299,685	3.4%	46	19.4	46
West Virginia	282,879	3,388,294	11,978	15	61,976	5.5%	3	13.9	17
Wisconsin	872,286	10,333,016	11,946	16	226,042	4.6%	12	15.1	29
Wyoming	89,009	1,398,444	15,815	6	27,214	5.1%	5	12.5	5

Source: U.S. Department of Education, National Center for Education Statistics, Common Core of Data (CCD) and the Bureau of Economic Analysis

Figure 15.15
FY 2013 Total Enrollment and Current Expenditures per Pupil



Note: Figures are adjusted for inflation using FY2014 CPI
Source: USOE, School Finance, US Department of Education, National Center for Education Statistics, and the Bureau of Labor Statistics

Higher Education

The Utah System of Higher Education (USHE) consists of eight public colleges and universities governed system-wide by the Utah State Board of Regents, and on an institutional level by Boards of Trustees. The eight institutions allow students to choose where they wish to study, from research and regional universities to comprehensive community colleges, based on their individual learning styles, needs, expectations, and circumstances.

Benefits of Higher Education

New national reports and local data continue to reinforce the importance of a college education in today's post -recession economy. In fact, the demand and payoff of a college credential is greater than ever. In May 2014, the Federal Reserve Board published findings that a college degree earns an individual $830,000 more over a lifetime than someone with only a high school diploma. In February 2014, the Pew Charitable Trust reported college graduates are three times less likely to be unemployed and four times less likely to live in poverty than those with only a high school diploma. Additionally, this study shows that individuals who have parents and/or siblings who completed a postsecondary degree or certificate are significantly more likely to earn these types of credentials themselves.

Higher Education's Role in Supporting the State's Workforce

Utah's higher education institutions are the largest provider of certifications and degree holders to Utah's workforce. Of Utah high school students who enroll in college, eight out of 10 enroll in a USHE institution. During the 2013-2014 school year, 32,491 degrees and certificates were awarded. Student enrollment experienced a third year of decline with a Fall 2014 enrollment of 167,317 (106,816 FTE), a 0.2% decline from 2013. Enrollment peaked in 2011 with 174,013, but is expected to increase in the coming years. USHE employs over 34,000 employees, with less than 50 percent funded by state tax dollars.

When comparing the most popular college degrees from USHE institutions with the top "5-Star" occupations that

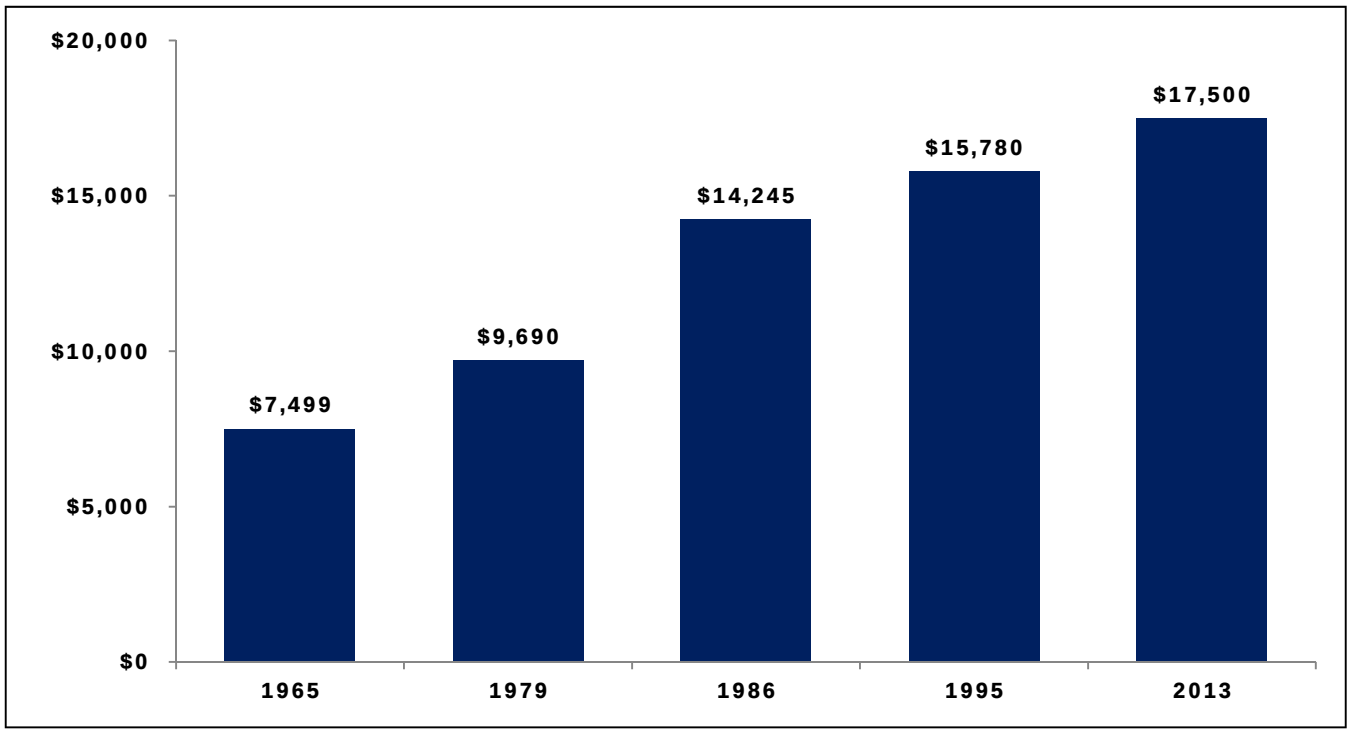
Figure 16.1
Utah System of Higher Education and State of Utah Population

Year	Fall Enrollment	Annual Change	Percent Change	State Population Estimate	Annual Change	Percent Change	Enrollment/ Population
1976	55,586			1,272,050			4.4%
1977	56,838	1,252	2.3%	1,315,950	43,900	3.5%	4.3%
1978	56,588	-250	-0.4%	1,363,750	47,800	3.6%	4.1%
1979	57,641	1,053	1.9%	1,415,950	52,200	3.8%	4.1%
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	121,053	5,006	4.3%	2,141,632	42,223	2.0%	5.7%
1999	113,704	-7,349	-6.1%	2,193,014	51,382	2.4%	5.2%
2000	122,417	8,713	7.7%	2,246,467	53,539	2.4%	5.4%
2001	126,377	3,960	3.2%	2,290,632	44,165	2.0%	5.5%
2002	134,939	8,562	6.8%	2,331,826	41,194	1.8%	5.8%
2003	138,625	3,686	2.7%	2,372,457	40,631	1.7%	5.8%
2004	140,933	2,308	1.7%	2,430,224	57,767	2.4%	5.8%
2005	144,937	4,004	2.8%	2,505,844	75,620	3.1%	5.8%
2006	144,302	-635	-0.4%	2,576,228	70,384	2.8%	5.6%
2007	140,397	-3,905	-2.7%	2,636,077	59,849	2.3%	5.3%
2008	152,228	11,831	8.4%	2,691,122	55,045	2.1%	5.7%
2009	164,860	12,632	8.3%	2,731,558	40,437	1.5%	6.0%
2010	171,178	6,318	3.8%	2,774,424	42,866	1.6%	6.2%
2011	174,013	2,835	1.7%	2,814,784	40,360	1.5%	6.2%
2012	171,291	-2,722	-1.6%	2,854,871	40,087	1.4%	6.0%
2013e	167,594	-3,697	-2.2%	2,900,872	46,001	1.6%	5.8%
2014f	167,317	-277	-0.2%	2,949,213	48,341	1.7%	5.7%

e = estimate
f = forecast

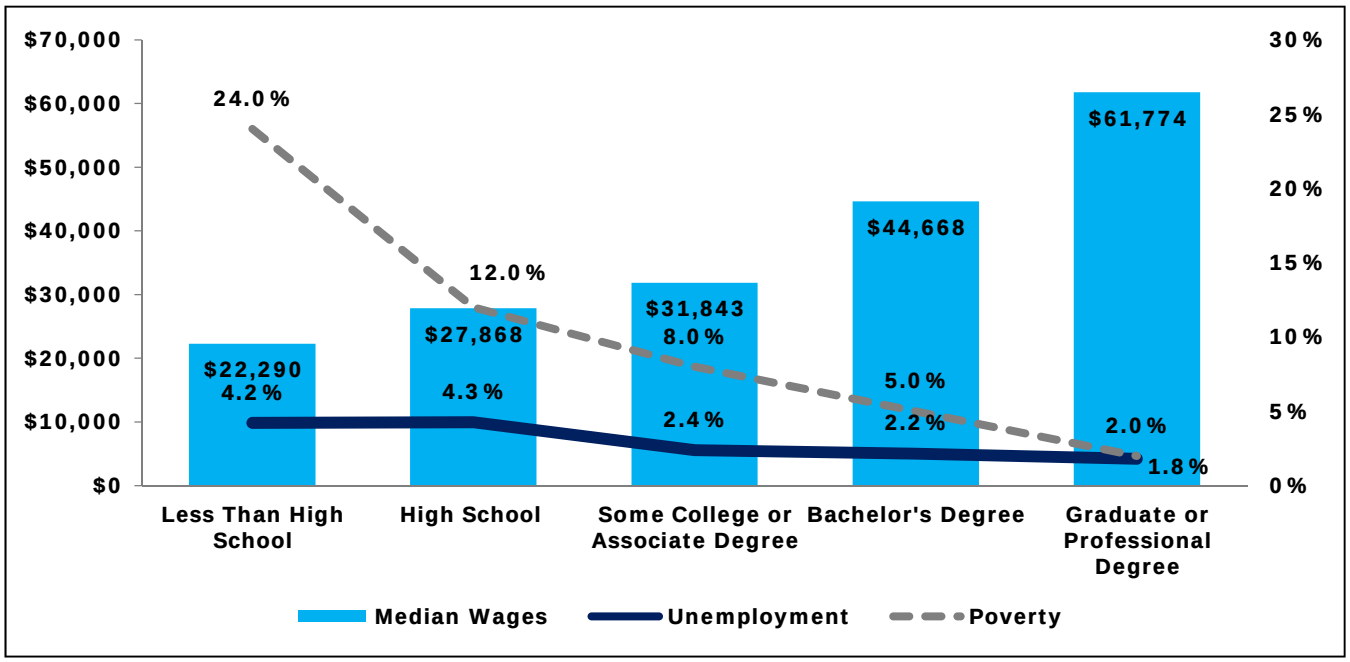
Sources:
1. Utah System of Higher Education
2. Common Data Committee
3. Utah Population Estimates Committee/ U.S. Census Bureau

Figure 16.2
Difference in Median Annual Earnings of College and High School Graduates Ages 25 to 32 (in 2012 dollars)



Source: Pew Research Center, February 2014. "The Rising Cost of Not Going to College"

Figure 16.3
Utahn's Wage Earnings and Unemployment by Educational Attainment



Note: Unemployment and Poverty rates for Graduate or Professional Degree are USHE estimates
Source: USHE, Department of Workforce Services, U.S. Census Bureau American Community Survey

require a college degree, as defined by the Utah Department of Workforce Services, there is a strong correlation between degrees and occupations.

Cost of Higher Education in Utah

With the cost of education rising across the nation, Utah remains one of the best deals for higher education in the country. Utah ranks second in the number of degrees awarded per $100,000 spent. According to WalletHub.com, Utah was the "Best State for Student Debt", had the third lowest student debt as a percentage of the cost of living, and had the fourth lowest percentage of student loan borrowers age 50+. Utah also has the third lowest tuition rates in the country for four-year public institutions, according to the College Board.

Improving College Preparation

In recent years, USHE has implemented key strategies to improve preparation and access for college. There is still tremendous work and resources required, especially to reach low-income and underserved populations.

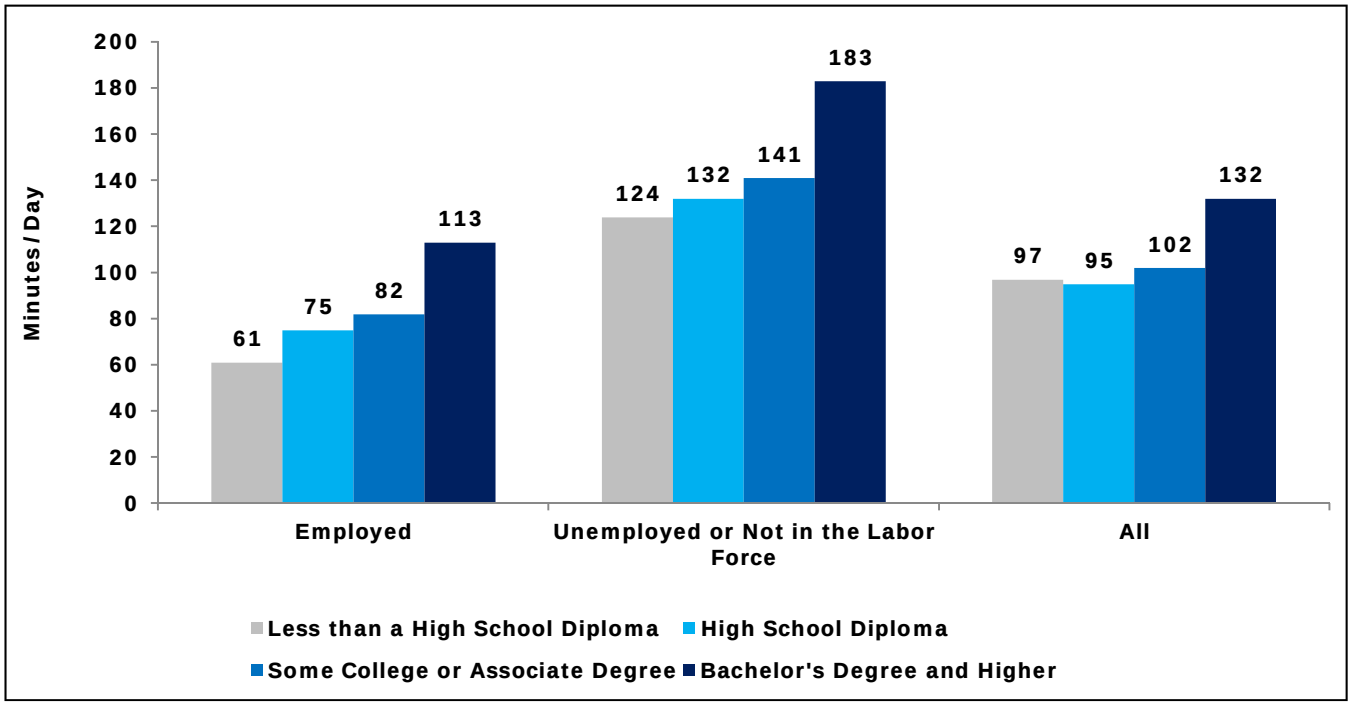
Concurrent enrollment has allowed 27,444 high school juniors and seniors to earn college credit. The amount of tuition they would have paid as traditional college students is equivalent to $27.7 million. The Regents' Scholarship, a statewide college preparatory scholarship, has had an average year-over-year growth of 54 percent since the 2008 inception. Utah Scholars is a college preparatory message delivered via volunteers from the business sector to the classroom, reaching 29,404 eighth graders in 133 junior high schools in 14 districts. The Postsecondary Counselor Conference gathered 617 high school and junior high counselors to receive college preparatory updates from higher education experts. "College Application Week" events targeted an estimated 20,000 first generation and low-income high school seniors in 49 high schools to apply to college in November 2014. "Financial Aid Nights" held 20 regional events for students and parents to get current information on paying for college. Finally, the Board of Regents formally adopted high school math course recommendations for college readiness, including four years of math during high school.

Improving College Completions

Approximately half of USHE students eventually complete a degree or certificate. In 2013, the Board approved specific strategies focused on improving student completion rates. This is a multi-year strategy structured to build on existing best practices at USHE institutions as well as instill long-term changes to improve a college students' likelihood of succeeding in what they endeavored to complete when starting college.

In July 2014, the Board of Regents directed each USHE institution to identify metrics and benchmarks by January 2015 to measure progress towards continued improvement in

Figure 16.4
Amount of Time (mins/day) Mothers Spend with Children under age 18 by Employment Status and Education Level: 2003 – 2012



Source: American Time Use Survey in Building Utah's Wealth through Higher Education, USHE 2014

these areas:

- 15 credits is equivalent to "full-time" status
- Plateau tuition focused on 12–15 credit hours
- Encourage students to enroll in math during the first year
- Accessible graduation maps for each major
- Increase reverse transfer/stackable credentials, general education transfer

66by2020

The State Board of Regents and USHE support the aggressive goal set by the Governor and supported by the Legislature that by the year 2020, 66 percent of Utah's adult population will have earned a post-secondary degree or certificate. Also known as 66by2020, the success of this program is dependent on the ongoing support of the governor and legislature to continue expanding capacity and efficiency at institutions. Acute Equity funding in the 2014 legislative session was a critical step to achieving this goal.

The projected cost to achieve 66by2020 includes an increase of 9 percent annually of State tax funds for higher education and an increase of 4 percent annually of investment in facilities. The projections assume total revenue from student tuition would increase an average of 6 percent annually.

Return on Investment of 66by2020

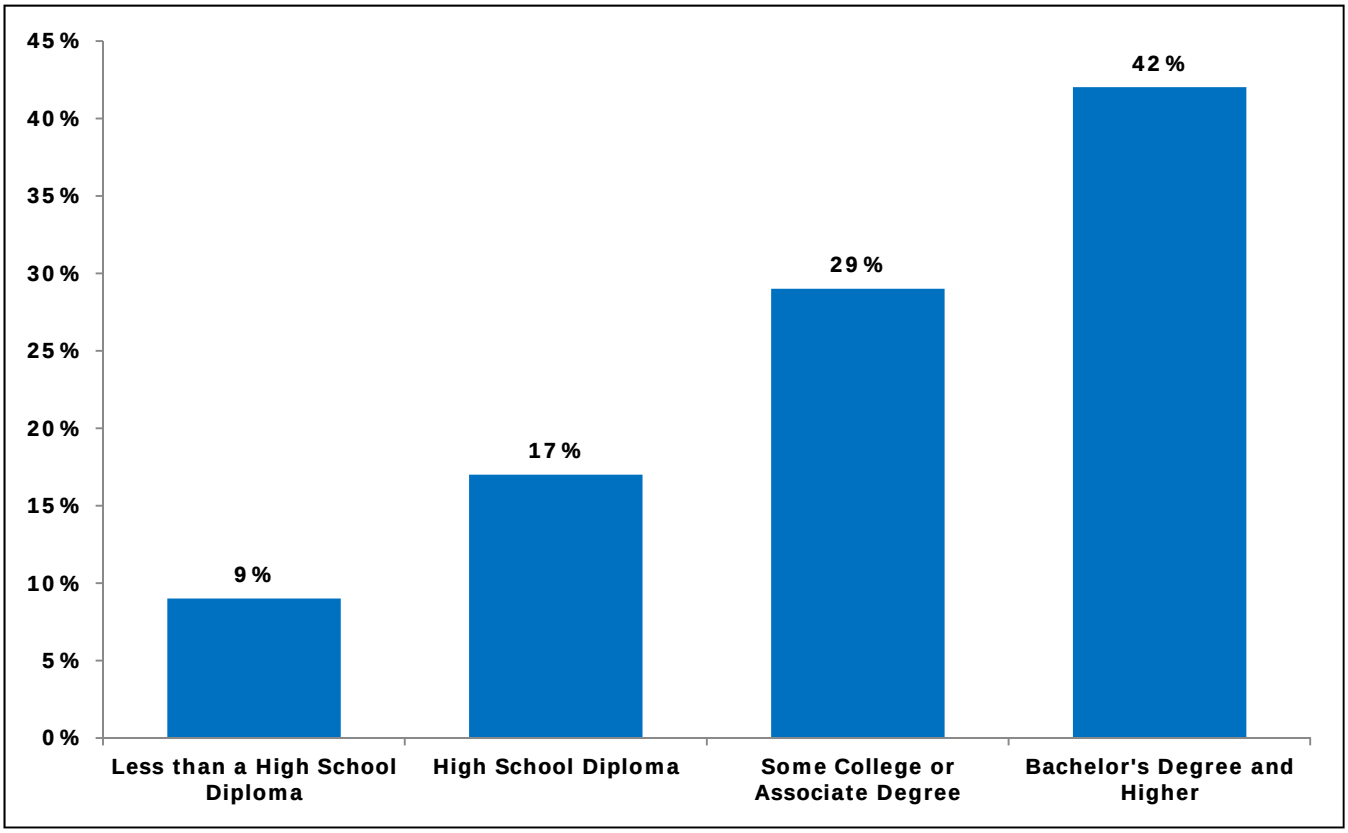
With those costs, there's a clear return on the state's investment in higher education. As the educational attainment of the state's workforce increases, so do median wages.

Figure 16.5
Utah System of Higher Education Enrollment by County

					Total Annual Change			Percent Change		
County	Fall 2011	Fall 2012	Fall 2013	Fall 2014	2011 to 2012	2012 to 2013	2013 to 2014	2011 to 2012	2012 to 2013	2013 to 2014
Beaver	350	401	333	278	51	-68	-55	14.6%	-17.0%	-16.5%
Box Elder	2,387	2,183	2,005	1,964	-204	-178	-41	-8.5%	-8.2%	-2.0%
Cache	5,471	5,724	5,564	5,332	253	-160	-232	4.6%	-2.8%	-4.2%
Carbon	717	824	883	863	107	59	-20	14.9%	7.2%	-2.3%
Daggett	26	31	26	28	5	-5	2	19.2%	-16.1%	7.7%
Davis	17,591	17,936	17,249	17,295	345	-687	46	2.0%	-3.8%	0.3%
Duchesne	526	549	487	477	23	-62	-10	4.4%	-11.3%	-2.1%
Emery	520	503	531	487	-17	28	-44	-3.3%	5.6%	-8.3%
Garfield	209	255	201	227	46	-54	26	22.0%	-21.2%	12.9%
Grand	227	248	282	267	21	34	-15	9.3%	13.7%	-5.3%
Iron	2,738	2,673	2,442	2,495	-65	-231	53	-2.4%	-8.6%	2.2%
Juab	661	629	604	530	-32	-25	-74	-4.8%	-4.0%	-12.3%
Kane	242	269	223	223	27	-46	0	11.2%	-17.1%	0.0%
Millard	934	902	774	703	-32	-128	-71	-3.4%	-14.2%	-9.2%
Morgan	561	594	524	548	33	-70	24	5.9%	-11.8%	4.6%
Piute	103	117	80	85	14	-37	5	13.6%	-31.6%	6.3%
Rich	105	113	135	120	8	22	-15	7.6%	19.5%	-11.1%
Salt Lake	46,529	45,400	46,372	46,834	-1,129	972	462	-2.4%	2.1%	1.0%
San Juan	438	520	562	551	82	42	-11	18.7%	8.1%	-2.0%
Sanpete	1,704	1,594	1,377	1,333	-110	-217	-44	-6.5%	-13.6%	-3.2%
Sevier	1,237	1,197	1,133	1,017	-40	-64	-116	-3.2%	-5.3%	-10.2%
Summit	1,500	1,541	1,648	1,546	41	107	-102	2.7%	6.9%	-6.2%
Tooele	2,051	1,978	2,173	2,145	-73	195	-28	-3.6%	9.9%	-1.3%
Uintah	695	727	644	586	32	-83	-58	4.6%	-11.4%	-9.0%
Utah	27,309	26,829	25,781	26,150	-480	-1,048	369	-1.8%	-3.9%	1.4%
Wasatch	1,216	1,286	1,263	1,265	70	-23	2	5.8%	-1.8%	0.2%
Washington	7,527	7,418	6,715	6,502	-109	-703	-213	-1.4%	-9.5%	-3.2%
Wayne	157	187	138	130	30	-49	-8	19.1%	-26.2%	-5.8%
Weber	11,384	11,565	10,800	10,910	181	-765	110	1.6%	-6.6%	1.0%
Other US Locations	24,460	22,735	22,841	23,042	-1,725	106	201	-7.1%	0.5%	0.9%
Foreign Locations	6,985	7,973	7,929	7,174	988	-44	-755	14.1%	-0.6%	-9.5%
Unknown/Unidentified	7,453	6,390	5,875	6,210	-1,063	-515	335	-14.3%	-8.1%	5.7%
Total	174,013	171,291	167,594	167,317	-2,722	-3,697	-277	-1.6%	-2.2%	-0.2%

Source: Utah System of Higher Education

Figure 16.6
Volunteer Rates by Educational Attainment Age 25 and Over



Source: Bureau of Labor Statistics, 2013c, Tables 1 and 2. in Building Utah's Wealth through Higher Education, USHE 2014

Figure 16.7
Degrees and Awards by Race/Ethnicity at Public Institutions in Utah: Academic Year: 2013-2014

	Total Degrees Awarded	White, Non-Hispanic	Black, Non-Hispanic	American Indian or Alaskan Native	Asian	Pacific Islander	Hispanic	Multiple	Non-Resident Alien	Race/ Ethnicity Unknown
University of Utah	8,023	6,047	95	39	325	31	595	138	547	206
Utah State University	5,795	4,652	77	65	59	20	239	57	256	370
Weber State University	4,690	3,628	54	20	75	19	173	56	83	582
Southern Utah University	1,565	1,389	19	21	16	19	51	0	24	26
Snow College	745	668	4	3	4	10	19	0	21	16
Dixie State University	2,003	1,694	29	21	19	23	123	26	32	36
Utah Valley State College	5,242	4,465	27	51	94	31	338	102	31	103
Salt Lake Community College	4,428	3,214	74	29	163	33	441	0	64	410
Total Public	32,491	25,757	379	249	755	186	1,979	379	1,058	1,749
Percent of Total	100.0%	79.3%	1.2%	0.8%	2.3%	0.6%	6.1%	1.2%	3.3%	5.4%

Notes:
1. Does not include UCAT Data.
2. Institutions are sorted by the type of institution and the year they were founded.

Source: IPEDS Completions Surveys

Figure 16.8
Fall Semester 2014 (Third Week) Total Headcount Enrollment By County of Origin and Ethnicity

County	Total		Indian or Alaskan Native		Hispanic Origin		Asian		Pacific Islander		Black/African American		White		Unknown		Non Resident Alien		Multiple	
	Students		Students		Students		Students		Students		Students		Students		Students		Students		Students	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Beaver	278	0.2%	5	1.8%	21	7.6%	3	1.1%	1	0.4%	-	-	235	84.5%	13	4.7%	-	-	-	-
Box Elder	1,964	1.2%	11	0.6%	104	5.3%	21	1.1%	5	0.3%	10	0.5%	1,655	84.3%	135	6.9%	2	0.1%	21	1.1%
Cache	5,332	3.2%	14	0.3%	327	6.1%	60	1.1%	11	0.2%	37	0.7%	4,210	79.0%	602	11.3%	7	0.1%	64	1.2%
Carbon	863	0.5%	8	0.9%	83	9.6%	10	1.2%	1	0.1%	1	0.1%	707	81.9%	46	5.3%	1	0.1%	6	0.7%
Daggett	28	0.0%	-	-	-	-	-	-	-	-	-	-	26	92.9%	2	7.1%	-	-	-	-
Davis	17,295	10.3%	50	0.3%	1,262	7.3%	249	1.4%	70	0.4%	127	0.7%	10,695	61.8%	4,620	26.7%	12	0.1%	210	1.2%
Duchesne	477	0.3%	8	1.7%	12	2.5%	-	-	-	-	1	0.2%	435	91.2%	14	2.9%	-	-	7	1.5%
Emery	487	0.3%	5	1.0%	9	1.8%	2	0.4%	1	0.2%	-	-	420	86.2%	46	9.4%	-	-	4	0.8%
Garfield	227	0.1%	4	1.8%	9	4.0%	1	0.4%	-	-	-	-	208	91.6%	5	2.2%	-	-	-	-
Grand	267	0.2%	3	1.1%	17	6.4%	1	0.4%	-	-	1	0.4%	228	85.4%	13	4.9%	2	0.7%	2	0.7%
Iron	2,495	1.5%	39	1.6%	145	5.8%	18	0.7%	14	0.6%	17	0.7%	2,094	83.9%	153	6.1%	10	0.4%	5	0.2%
Juab	530	0.3%	2	0.4%	13	2.5%	3	0.6%	2	0.4%	2	0.4%	493	93.0%	11	2.1%	2	0.4%	2	0.4%
Kane	223	0.1%	3	1.3%	6	2.7%	1	0.4%	1	0.4%	-	-	193	86.5%	19	8.5%	-	-	-	-
Millard	703	0.4%	4	0.6%	45	6.4%	4	0.6%	-	-	-	-	634	90.2%	12	1.7%	1	0.1%	3	0.4%
Morgan	548	0.3%	-	-	12	2.2%	1	0.2%	1	0.2%	1	0.2%	492	89.8%	37	6.8%	-	-	4	0.7%
Piute	85	0.1%	2	2.4%	5	5.9%	-	-	-	-	2	2.4%	73	85.9%	3	3.5%	-	-	-	-
Rich	120	0.1%	-	-	5	4.2%	-	-	-	-	1	0.8%	100	83.3%	14	11.7%	-	-	-	-
Salt Lake	46,834	28.0%	311	0.7%	5,651	12.1%	2,037	4.3%	503	1.1%	827	1.8%	34,021	72.6%	3,262	7.0%	62	0.1%	160	0.3%
San Juan	551	0.3%	207	37.6%	22	4.0%	6	1.1%	1	0.2%	2	0.4%	284	51.5%	24	4.4%	1	0.2%	4	0.7%
Sanpete	1,333	0.8%	13	1.0%	85	6.4%	4	0.3%	6	0.5%	8	0.6%	1,171	87.8%	29	2.2%	12	0.9%	5	0.4%
Sevier	1,017	0.6%	18	1.8%	35	3.4%	2	0.2%	4	0.4%	4	0.4%	916	90.1%	35	3.4%	-	-	3	0.3%
Summitt	1,546	0.9%	3	0.2%	106	6.9%	10	0.6%	-	-	8	0.5%	1,227	79.4%	183	11.8%	2	0.1%	7	0.5%
Tooele	2,145	1.3%	18	0.8%	209	9.7%	9	0.4%	11	0.5%	18	0.8%	1,727	80.5%	127	5.9%	1	0.0%	25	1.2%
Unitah	586	0.4%	14	2.4%	34	5.8%	-	-	1	0.2%	4	0.7%	485	82.8%	38	6.5%	1	0.2%	9	1.5%
Utah	26,150	15.6%	150	0.6%	2,682	10.3%	306	1.2%	217	0.8%	161	0.6%	19,078	73.0%	3,068	11.7%	71	0.3%	417	1.6%
Wasach	1,265	0.8%	5	0.4%	96	7.6%	11	0.9%	5	0.4%	4	0.3%	999	79.0%	137	10.8%	1	0.1%	7	0.6%
Washington	6,502	3.9%	63	1.0%	481	7.4%	62	1.0%	74	1.1%	43	0.7%	5,435	83.6%	215	3.3%	10	0.2%	119	1.8%
Wayne	130	0.1%	-	-	-	-	-	-	1	0.8%	-	-	125	96.2%	4	3.1%	-	-	-	-
Weber	10,910	6.5%	45	0.4%	1,257	11.5%	137	1.3%	24	0.2%	83	0.8%	6,025	55.2%	3,171	29.1%	17	0.2%	151	1.4%
Other US Locations	23,042	13.8%	404	1.8%	2,040	8.9%	531	2.3%	209	0.9%	714	3.1%	15,875	68.9%	2,710	11.8%	168	0.7%	391	1.7%
Foreign Locations	7,174	4.3%	5	0.1%	406	5.7%	256	3.6%	17	0.2%	75	1.0%	338	4.7%	634	8.8%	5,440	75.8%	3	0.0%
Unknown/Unidentified	6,210	3.7%	58	0.9%	314	5.1%	80	1.3%	22	0.4%	28	0.5%	4,942	79.6%	613	9.9%	73	1.2%	80	1.3%
Total	167,317	100.0%	1,472	0.9%	15,493	9.3%	3,825	2.3%	1,202	0.7%	2,179	1.3%	115,546	69.1%	19,995	12.0%	5,896	3.5%	1,709	1.0%

Note: Students who were listed with both an race/ethnicity code and as non-resident aliens are reported as non-resident aliens.

Source: Utah System of Higher Education

Figure 16.9
Full Cost Study Summary (Appropriated Funds Only): 2012-2013

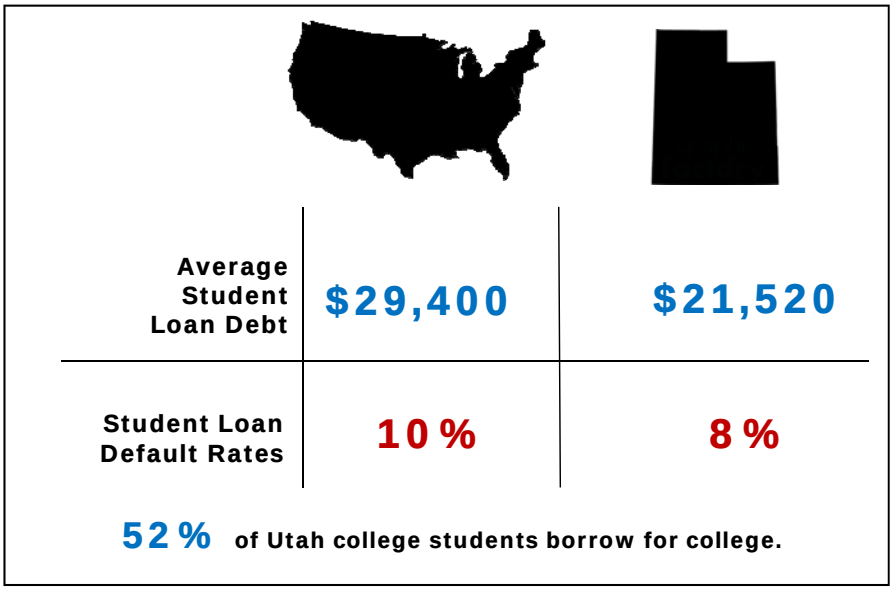
Institution	Founded	Direct Cost of Instruction	Full Cost of Instruction	FTE Students 2013-14	Student/ Faculty Ratio	Direct Cost of Instruction per FTE	Full Cost of Instruction per FTE
University of Utah[1]	1850	$218,732,468	$298,572,745	28,682	19.4	$7,626	$10,410
Utah State University	1888	131,091,896	200,370,732	20,305	21.5	$6,456	$9,868
Weber State University	1889	58,718,879	123,947,148	15,297	16.1	$3,839	$8,103
Southern Utah University	1897	26,459,319	64,721,702	6,380	18.3	$4,147	$10,144
Snow College	1888	11,504,577	33,371,193	3,067	18.9	$3,751	$10,881
Dixie State University	1911	18,158,464	50,015,251	6,258	17.8	$2,902	$7,993
Utah Valley University	1941	80,092,514	167,974,316	20,712	19.2	$3,867	$8,110
Salt Lake Community College	1947	54,989,708	111,478,705	17,928	20.0	$3,067	$6,218
Total		599,747,825	1,050,451,793	118,629	19.1	$5,056	$8,855

FTE = Full-Time Equivalent

Note: Institutions are sorted by the type of institution and the year they were founded.
[1] Does not include the School of Medicine
[2] Data is part of Utah State University Cost-Study
Source: Utah System of Higher Education

Building capacity at USHE institutions will help provide expanded access to quality higher education in Utah that will not only expand economic opportunity for residents, but also will strengthen the overall state economy in the long-term. It is projected that by reaching the 66by2020 goal, $14.2 billion in wages would be added to the Utah economy over 30 years, an increase of $358 million, $1.4 billion in additional tax revenue, and an estimated 42,057 Utahns can avoid the cycle of intergenerational poverty. There are also indirect returns in the form of reducing the need for public assistance, lowering crime and incarceration rates, and increasing volunteerism.

Figure 16.10
Low Student Debt and Default Rates



Source: Project on Student Debt

Current Progress of 66by2020
USHE awarded 32,491 degrees and certificates in 2013-14. USHE continues its increased number of awards and is currently on track to achieve its 2020 goal of 336,950 degrees and awards between 2010 and2020. USHE is hopeful this trajectory continues with ongoing support of the governor and legislature to continue expanding capacity at institutions.

While early successes towards the 66by2020 goal have been achieved, upcoming years will require additional resources, greater focus, and increased efficiencies. USHE anticipates continued growth in student enrollments in fall 2015, followed by more moderate growth in subsequent years, highlighting the need to improve USHE's rates of completion of a degree and certificate. In addition, Utah's population continues to become increasingly diverse, which means more low-income and first generation students who generally require more resources to prepare for and complete a college education.

Figure 16.11
USHE Summary of Tuition and Fees by Institution

	2000-01	2001-02	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
University of Utah															
Resident	$2,895	$3,043	$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
Nonresident	8,828	9,299	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
Utah State University															
Resident	2,401	2,590	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
Nonresident	7,279	7,897	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
Utah State University - Eastern															
Resident	1,476	1,529	1,630	1,740	1,861	1,980	2,091	2,161	2,242	2,470	2,670	2,922	3,070	3,221	3,373
Nonresident	5,097	5,353	5,762	6,228	6,666	7,120	7,670	7,964	4,142	4,540	4,940	5,394	5,691	5,938	6,275
Weber State University															
Resident	2,106	2,252	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
Nonresident	6,283	6,718	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
Southern Utah University															
Resident	2,067	2,194	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
Nonresident	6,543	6,776	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
Snow College															
Resident	1,354	1,414	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
Nonresident	5,601	5,884	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
Dixie State University															
Resident	1,481	1,544	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
Nonresident	5,483	5,764	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
Utah Valley University															
Resident	1,682	1,882	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
Nonresident	5,262	5,922	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
Salt Lake Community College															
Resident	1,636	1,762	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
Nonresident	5,131	5,450	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

Notes:
1. Tuition is equal to two semesters at 15 credit hours each.
2. Lower division (freshman & sophomore) rate only. Higher differential rate for upper division (junior and senior) for University of Utah.
3. Rate for undergraduate returning students. Higher differential rate for new students, international students and students enrolling in Business and Engineering courses for Utah State University.
4. Institutions are sorted by the type of institution and the year they were founded.

Source: Utah System of Higher Education

Figure 16.12
Public Institutions in Utah Total Degrees and Awards

Degrees and Awards	2009-10	2010-11	2011-12	2012-13	2013-14	Change 2013-14	% Change 2013-14
Total							
University of Utah	7,111	7,483	7,825	8,155	8,023	-132	-1.6%
Utah State University[1]	4,842	5,142	5,515	5,483	5,795	312	5.7%
Weber State University	4,125	4,145	4,505	4,736	4,690	-46	-1.0%
Southern Utah University	1,609	1,778	1,606	1,743	1,565	-178	-10.2%
Snow College	720	1,041	1,088	936	745	-191	-20.4%
Dixie State University	2,087	2,019	2,051	2,028	2,003	-25	-1.2%
Utah Valley University	3,739	4,188	4,559	4,611	5,242	631	13.7%
Salt Lake Community College	4,175	4,180	4,190	4,049	4,428	379	9.4%
Total Public	28,408	29,976	31,339	31,741	32,491	750	2.4%
Certificates & Awards*							
University of Utah	292	302	379	369	397	28	7.6%
Utah State University[1]	63	71	82	71	205	134	188.7%
Weber State University	64	57	59	80	75	-5	-6.3%
Southern Utah University	13	20	15	19	9	-10	-52.6%
Snow College	67	293	281	205	44	-161	-78.5%
Dixie State University	875	557	437	384	344	-40	-10.4%
Utah Valley University	59	85	92	35	85	50	142.9%
Salt Lake Community College	791	767	640	564	646	82	14.5%
Total Certificates & Awards	2,224	2,152	1,985	1,727	1,805	78	4.5%
Associate's							
Utah State University[1]	815	860	973	851	1,000	149	17.5%
Weber State University	1,850	1,798	1,997	1,995	1,994	-1	-0.1%
Southern Utah University	317	359	352	421	337	-84	-20.0%
Snow College	653	748	807	731	694	-37	-5.1%
Dixie State College	894	1,080	1,131	1,132	1,150	18	1.6%
Utah Valley University	1,689	1,809	1,831	1,768	2,280	512	29.0%
Salt Lake Community College	3,384	3,413	3,550	3,485	3,782	297	8.5%
Total Associate's	9,602	10,067	10,641	10,383	11,237	854	8.2%
Baccalaureate							
University of Utah	4,622	4,801	4,919	5,139	5,092	-47	-0.9%
Utah State University	3,040	3,232	3,371	3,557	3,548	-9	-0.3%
Weber State University	1,980	2,029	2,157	2,360	2,349	-11	-0.5%
Southern Utah University	927	979	925	988	954	-34	-3.4%
Snow College					7		
Dixie State College	318	382	483	512	509	-3	-0.6%
Utah Valley University	1,980	2,276	2,612	2,739	2,825	86	3.1%
Total Baccalaureate	12,867	13,699	14,467	15,295	15,284	-11	-0.1%
Master's							
University of Utah	1,565	1,657	1,809	1,921	1,823	-98	-5.1%
Utah State University	831	862	990	895	927	32	3.6%
Weber State University	231	261	292	301	272	-29	-9.6%
Southern Utah University	352	420	314	315	265	-50	-15.9%
Utah Valley University	11	18	24	69	52	-17	-24.6%
Total Master's	2,990	3,218	3,429	3,501	3,339	-162	-4.6%
Doctorate							
University of Utah	279	304	339	324	330	6	1.9%
Utah State University	88	111	94	105	109	4	3.8%
Total Doctorate	367	415	433	429	439	10	2.3%
First Professional							
University of Utah	353	419	379	402	381	-21	-5.2%
Utah State University	5	6	5	4	6	2	50.0%
Total First Professional	358	425	384	406	387	-19	-4.7%

*Includes Post-Baccalaureate and Post-Master's Certificates for the University of Utah and Utah State University
Note: Institutions are sorted by the type of institution and the year they were founded.
[1] Completions counts include Utah State Univeristy - Eastern
Source: IPEDS Completions Surveys

Figure 16.13
Public Institutions in Utah Total Degrees and Awards by Instructional Program: 2013-2014

Classification of Instructional Program (CIP)	U of U	USU	WSU	SUU	SNOW	DSU	UVU	SLCC	USHE Total
Agriculture & Natural Resources	48	209	0	22	12	0	1	0	292
Architecture & Related Studies	78	49	0	0	0	0	0	0	127
Area, Ethnic & Cultural Studies	38	45	0	0	0	0	0	0	83
Biological Sciences/Life Sciences	243	150	66	70	9	27	112	23	700
Business & Marketing	1,069	770	500	199	44	161	780	289	3,812
Communications	419	70	83	66	13	75	139	134	999
Computer & Info Sciences	316	149	133	15	8	38	221	196	1,076
Education	209	717	262	289	29	72	373	59	2,010
Engineering & Related Technologies	632	430	118	30	22	1	96	118	1,447
English Language & Literature	163	141	93	28	3	28	89	17	562
Family and Consumer Sciences	263	257	48	61	10	0	0	6	645
Foreign Languages	147	34	34	9	1	5	41	13	284
Health Professions	976	565	1,467	68	128	453	277	643	4,577
History	95	45	27	23	1	1	46	13	251
Law & Legal Studies	138	21	0	7	0	0	33	50	249
Liberal Arts & Sciences/Gen. Studies	56	950	1,231	345	354	953	1,224	2,059	7,172
Mathematics	121	41	13	5	2	0	16	12	210
Other [1]	555	171	3	37	3	54	285	16	1,124
Other Vocational Studies [2]	0	65	254	59	32	68	846	411	1,735
Philosophy	33	12	6	2	0	0	17	0	70
Physical Sciences & Science Tech.	226	68	45	16	1	0	31	63	450
Psychology	451	169	89	77	14	41	364	81	1,286
Social Sciences & Public Admin.	1,324	515	160	86	12	0	84	86	2,267
Visual & Performing Arts	423	152	58	51	47	26	167	139	1,063
Total degrees and awards completed	8,023	5,795	4,690	1,565	745	2,003	5,242	4,428	32,491

Notes:
1. Includes Library Science, Military Technologies, Multi/Interdisciplinary Studies, and Parks & Recreation.
2. Includes Personal Services, Vocational Home Economics, Protective Services, Construction Trades, Mechanics & Repairers, Precision Production Trades, Transportation & Materials Moving.

Source: IPEDS Completions Surveys - Academic Year 2013-2014

Figure 16.14
USHE Fall Semester Student and FTE Growth: 2013 - 2014

	Total Headcount			Full-Time Equivalent Students		
USHE Institution	2013	2014	% Change	2013	2014	% Change
University of Utah	32,080	31,515	-1.76%	26,933	26,742	-0.71%
Utah State University	27,812	27,662	-0.54%	20,557	20,889	1.62%
Weber State University	25,301	26,266	3.81%	15,617	15,989	2.38%
Southern Utah University	7,745	7,656	-1.15%	6,183	6,150	-0.54%
Snow College	4,605	4,779	3.78%	3,581	3,746	4.62%
Dixie State University	8,350	8,570	2.63%	6,184	6,405	3.56%
Utah Valley University	30,564	31,332	2.51%	20,697	21,335	3.08%
Salt Lake Community College	31,137	29,537	-5.14%	16,924	15,932	-5.86%
Total	167,594	167,317	-0.17%	116,676	117,189	0.44%

Note: Institutions are sorted by the type of institution and the year they were founded.
Full-time Equivalent Students are based on Budget-related enrollments only (rounded)

Source: Utah System of Higher Education

Agriculture

In 2013, Utah had an estimated 11 million acres of farmland, or 4.8 percent of Utah's land area. There are 18,200 farm and ranch operations with an average size of 604 acres. It is estimated that there were 777,000 cattle and calves in January 2014, 700,000 hogs and pigs in December 2013, and 275,000 sheep and lambs in January 2014. Utah milk cows produced 2,036,000 pounds of milk in 2013, an increase of 4.3 percent over 2012. This makes up 0.9 percent of total U.S. milk production. The market value, or farm gate sales, of Utah agricultural products sold was $1,816,147 in 2012. Livestock, livestock products and poultry made up $1,242,049 or 68 percent of total sales, an increase of 3 percent over 2011. Crop sales, which included nursery and greenhouse production, contributed $574,099, or 32 percent of total sales in 2012. This is an increase of 14 percent over 2011. Total agriculture sales figures do not reflect the value of commodities produced and used on Utah farms and ranches, such as hay and corn fed to livestock. By incorporating this value, production agriculture accounts for $3.8 billion in total economic output or 3.1 percent of the state GDP in 2012.

The farm share of each dollar spent by consumers increased from 14.1 percent in 2010 to 15.5 percent in 2011. Non-farm food costs including transportation, manufacturing, packaging, and food consumed in restaurants and other fast food outlets continues to account for the majority of the consumer dollar spent on food at 84.5 percent. Even with the recent increase to 15.5 percent, it is still only half of the 31 percent farmer share of the consumer dollar in 1980.

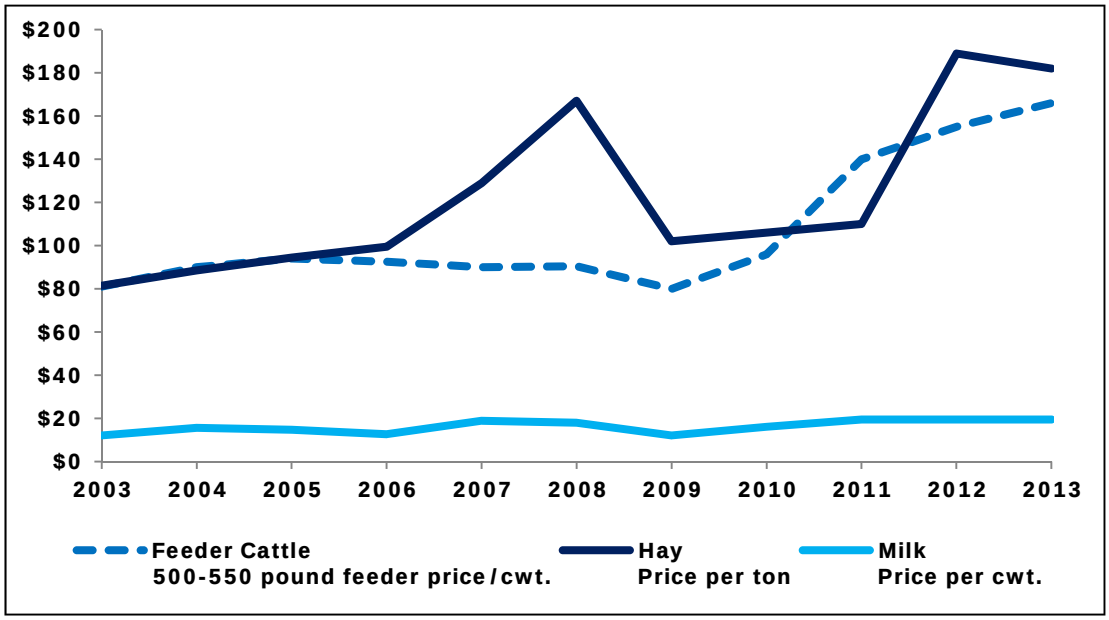
The agricultural production sector and agricultural processing sector together in 2011 accounted for $17.5 billion in total economic output in Utah, or 14.1 percent of total state GDP. Agricultural production and processing accounted for 78,200 jobs with income compensation of $2.7 billion.

FY 2012 Summary

Sales

Livestock and poultry are the foundation of Utah agriculture: cattle and calves are the leading livestock sector with $361 million in sales in 2012, an increase of 7 percent over 2011. Vast rangelands are the foundation of livestock production across Utah and for the 6,458 cattle ranching operations statewide. Dairy production topped $326 million in sales in 2012, down 9 percent in value from 2011. With 90,000 dairy cows on 254 farms, wide fluctuations in milk and cheese prices have a dramatic impact on the financial well-being of Utah's dairy industry. Pork sales for Utah's 581 hog farms hit $291 million in 2012, ranking 14th nationally among the states and a dramatic increase of 38 percent over 2011. Growing demand for pork and lower hog numbers nationally has increased prices to consumers and profitability for hog producers. For the 991 producers, poultry and egg sales of $140 million in 2012 was down 3 percent from 2011. Utah's 1,622 sheep ranches, like cattle ranches, are dependent on grazing federally owned rangelands. Sheep and goat sales in 2012 topped $36 million, ranking Utah the eighth largest sheep producing state in the nation. Increasing national and international demand for mink allowed Utah's 268 producers to follow national trends increasing production by 25 percent to $292 million in sales in 2011. Utah ranks second in mink pelt sales among the states. Crop production was again led by strong hay sales of $297 million produced on 6,811 farms, an increase of 23 percent in sales value over 2011. Nursery, greenhouse, floriculture, and sod from 298 farms had sales of $108 million in 2012, about equal to 2011.

Figure 17.1
Average Annual Price Received in Major Utah Agricultural Sectors



Source: U.S. Department of Agriculture

Top Counties
Utah's five top agricultural counties based on sales value in 2012 were: Beaver County with $289 million; Utah County with $223 million; Millard County with $180 million; Box Elder County with $170 million; and Sanpete County with $147 million.

Exports
Utah exported $489 million in 2013. The top five importing countries were: Japan at $68.5 million; Canada at $48.9 million; Hong Kong at $44 million; Mexico at $39 million; and China at $39 million. Utah's top five agriculture exports were: Other products (hides, horticulture, and prepared foods) at $222 million; pork at $57 million; dairy products at $47 million; beef and veal at $29 million; and wheat at $26 million.

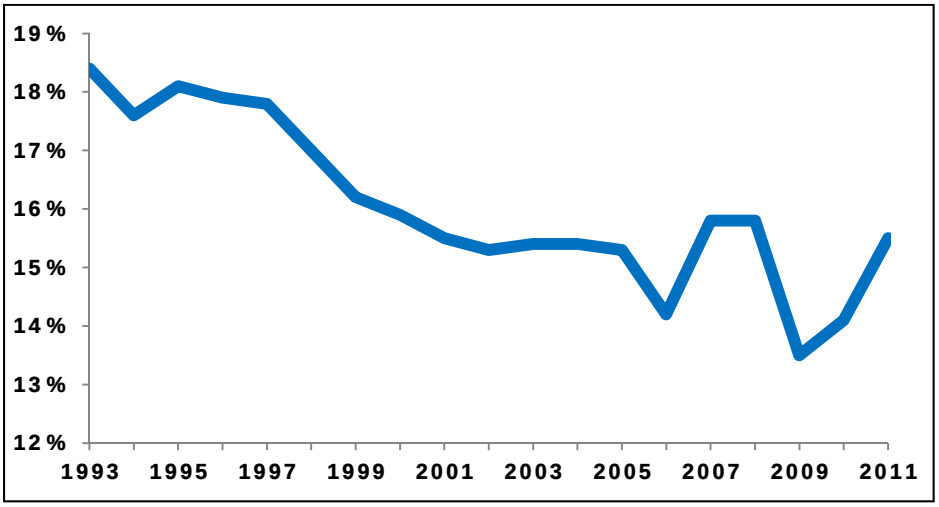
Livestock/Poultry Inventory
Based on January 2013 numbers, Utah ranks second in the nation in mink production with 699,000 head; fifth in sheep production with 275,000 head; 12th in turkey production with 2,895,000 head; 15th in hogs and pigs with 732,000 head; 23rd in dairy cows with 90,000 head; and 36th in cattle and calves with 777,000.

Prices
The U.S. cattle inventory is at a 60-year low, contributing to escalating consumer beef prices. Generally, Utah's ranchers produce feeder cattle (500 to 700 pounds) for sale to finishing feedlots. Prices for feeder cattle have increased dramatically in recent years peaking at more than $245/cwt in late summer of 2014, up more than 48% from 2013. Milk prices in 2014 are up nearly 20% over 2013 exceeding $25.00/cwt and improving the economic position of Utah dairy farmers. Hay prices were reported in both December 2011 and 2012 at $192/ton, misleading if observed without further explanation for each market year. Average hay prices for the entire 12-months of 2011 was $164/ton. Average hay prices for same 12-month period of 2012 were $189/ton, an average increase of 15 percent. This year-over-year average price increase is a good indicator of strong economic growth.

Significant Issues
Grazing Utah's rangelands and harvesting renewable grasses and forage is critical to the financial survival of Utah ranchers and their continued economic contribution. Of Utah's 45 million acres of rangeland, 33 million acres are owned and managed by the federal government, while only 8 million acres are privately owned. Economically viable sheep and cattle operations must combine private grazing lands with leasing federally managed grazing rights or permitted AUMs (Animal Unit Months) on public lands. Federal land managers have systematically cut grazing rights and AUMs, dramatically affecting ranching operations through statewide cuts in sheep and cattle numbers and ultimately reducing the livestock sector's contribution to Utah's economy. Federal land managers have cut or suspended rancher's use of 72 percent of their historic 5.3 million AUMs on Forest Service and Bureau of Land Management (BLM) administered lands. More than 3 million AUMs have been cut outright and an additional 550,000 active AUMs are currently suspended from livestock use. Utah's sheep inventory that peaked at over 3 million head is now only 275,000 head – or more than a 90 percent reduction. Cuts and uncertainty are leading causes of Utah's beef herd dropping by 15,000 head between 2012 and 2013. That reduction directly correlated to the loss of $25 million from the Utah economy. Predator losses continued to plague sheep producers in 2013.These losses, led by coyotes, cost sheep ranchers $4.4 million and the deaths of more than 27,000 sheep and lambs, or about that 10 percent of the total population.

Conclusion
Agriculture production and processing is a significant economic contributor in Utah. Federal land management policies on Forest Service and BLM lands are adversely impacting Utah's livestock industry, increasing uncertainty, reducing production and ultimately increasing consumer prices for meat protein. As consumer prices have increased, the 2012 farmer's share was 15.5 percent, up from 14.1 percent in 2011, reversing a long downward trend.

Figure 17.2
Farmer Share of Food Spending



Note: Axis does not start at zero
Source: U.S. Department of Agriculture

Construction

The value of permit-authorized construction in Utah was $4.7 billion in 2014, down slightly from $5.0 billion in 2013. This estimate includes the value of residential and nonresidential construction and additions, alterations, and repairs. Residential construction declined by 2 percent despite an increase in number of residential units. The decline in value was due, in part, to a shift in types of residential units receiving building permits, fewer single family homes and more apartments. In addition to the lower residential value the value of additions, alterations, and repairs dropped from $776 million in 2013 to $600 million in 2014 while the value of nonresidential construction fell 11 percent from $1.08 billion to $970 million. Modest weakness in single family construction; additions, alterations and repairs; and nonresidential construction accounted for the drop in construction value in 2014. Residential activity accounted for two-thirds of permit-authorized construction value in 2014 while nonresidential activity captured at 20 percent share. The remaining 13 percent included additions, alterations, and repairs.

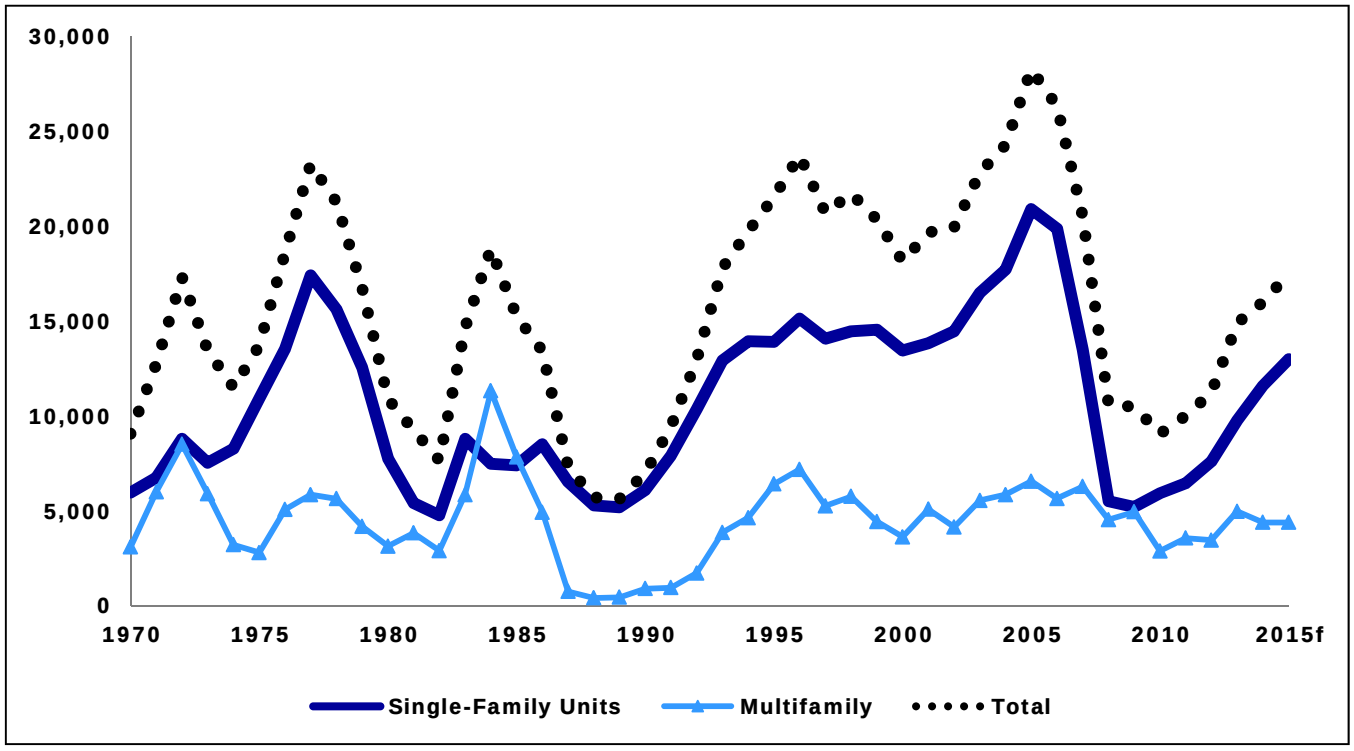
2014 Summary

In 2014, home building construction continued its slow recovery from the Great Recession. Typically, four years after the trough, construction has recovered to about 80 percent of the pre-recession peak. In the current cycle however, the recovery is only about 50 percent of the pre-recession peak, 11,600 single family homes in 2014 versus 21,000 in 2005, despite historically low mortgage rates.

The recovery has been hindered by a set of distinctive characteristics: (1) a record number of foreclosures; in none of the previous four housing cycles were foreclosures a factor; (2) the 6 percent decline in jobs over the two-year period 2009-2010 totaling a loss of 70,000 jobs, creating the weakest labor market since the Great Depression; (3) four consecutive years (2008-2011) of unprecedented falling housing prices; and (4) the doubling-up of households, which reduced housing demand. The level of residential construction in 2014 was weaker than expected due to the lingering effects of the Great Recession.

While home builders struggled with weak demand, the apartment market was thriving. Vacancy rates in most markets dropped below 5 percent and rental rates increased 3 to 5 percent. The strong rental demand was a result of a number of factors; renting was easier and often the only option for households with credit issues and low FICO scores, the release of pent-up demand in doubled-up households, and a modest shift in preferences, particularly

Figure 18.1
Utah Residential Construction Activity



Source: University of Utah, David Eccles School of Business, Bureau of Economic and Business Research

among young households, from owning to renting. The number of apartments units receiving building permits in 2014 reached 4,400 units, a 75 percent increase over 2013.

Permit authorized non-residential construction has yet to find much post-recession traction. The value of non-residential construction in 2014 was $970 million, about eight percent below 2013. Permit value of new office and retail construction declined in 2014 but industrial and hospital construction were both up. The highest value sector was hospitals with $103 million in new construction value.

Although commercial permit activity was soft in 2014, actual construction activity showed some improvement. This divergence can occur due to lag time between the permit process and commencement of construction among other factors. Favorable conditions in capital markets and commercial real estate fundamentals improved throughout 2014. Consequently, developers were able to execute on many planned projects. Across all property types, construction levels were up in 2014, but completions were similar to those experienced in 2013. A large amount of completions is expected in 2015.

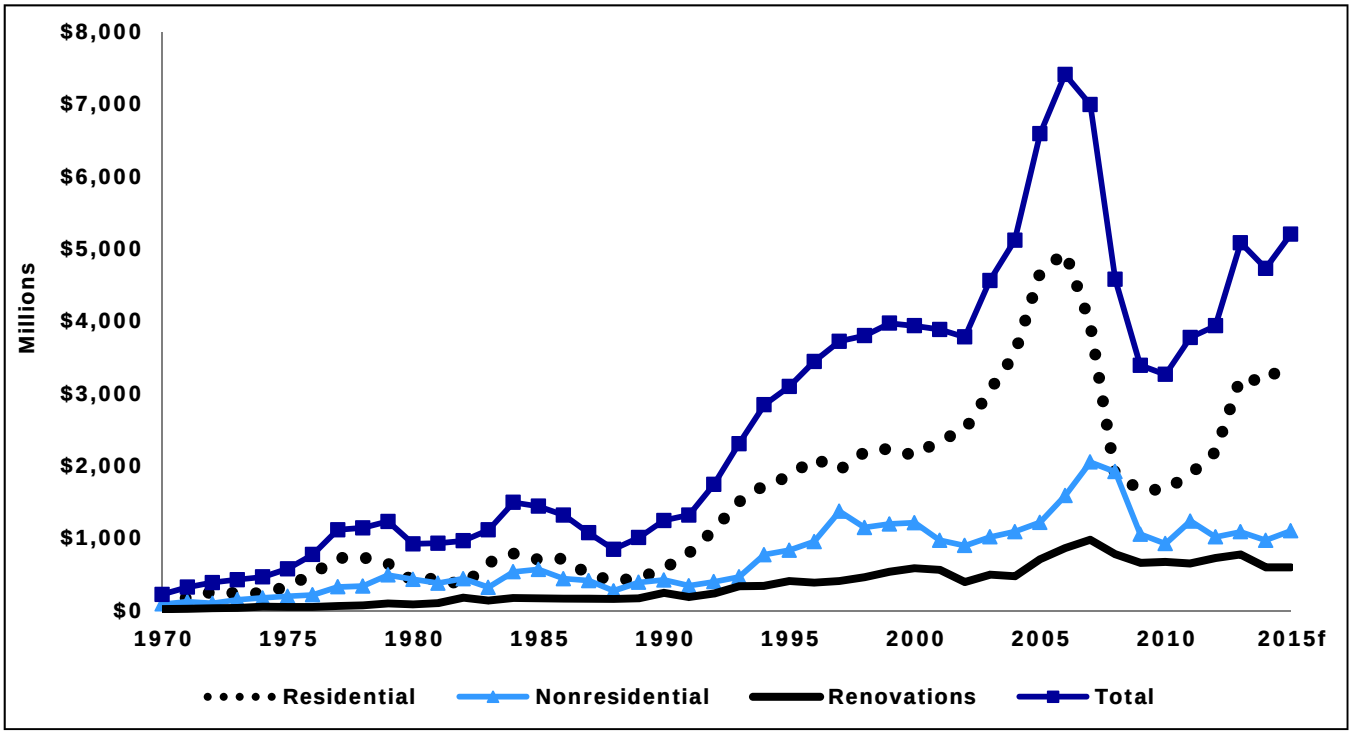
With regard to the office market, construction activity remains most robust in southern Salt Lake County and northern Utah County. This growth is being amplified by rapid growth in the tech sector. The single largest project underway at year-end 2014 was the 439,611 square foot downtown office tower, 111 S. Main Street. This project is expected to be completed in mid-2016. Thanks in part to 111 S. Main, the amount of leasable space under construction in the Salt Lake market surpassed 1 million square feet in 2014, with the majority of this total expected to reach completion in 2015.

Construction activity in the industrial sector (including distribution warehouses and manufacturing facilities) was most concentrated in the northwest quadrant of Salt Lake County. Over 2.5 million square feet of new product broke ground in the Salt Lake valley in 2014, the majority of which was speculative. In addition, there are several other large projects planned. High levels of construction are expected to continue through mid-2015 in this sector.

New retail construction is most concentrated in the southwest quadrant of Salt Lake County. However, the redevelopment of the Cottonwood Mall in Salt Lake and renovations to the University Mall in Orem are two other notable projects that will both reach completion in 2016. In the Salt Lake market, over 500,000 square feet of new retail space was completed in 2014 representing an increase over 2013. However, this level is expected to taper off in 2015.

Healthy levels of construction activity across commercial real estate property types reflect a strong Utah economy. At the

Figure 18.2
Value of New Construction



Source: University of Utah, David Eccles School of Business, Bureau of Economic and Business Research

Figure 18.3
Residential and Nonresidential Construction Activity

Year	Single-Family Units	Multi-Family Units	Mobile Homes/ Cabins	Total Units	Value of Residential Construction (millions)	Value of Nonresidential Construction (millions)	Value of Add., Alt., and Repairs (millions)	Total Valuation (millions)
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	7,305	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	5,632	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
1991r	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	970.0	562.8	3,885.5
2002	14,466	4,149	926	19,941	2,491.0	897.0	393.0	3,781.0
2003	16,515	5,555	766	22,836	3,046.4	1,017.4	497.0	4,560.8
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	1,588.0	865.3	7,408.8
2007	13,510	6,290	739	20,539	3,963.2	2,051.0	979.7	6,993.9
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	1,054.3	660.1	3,388.4
2010	5,936	2,890	240	9,066	1,667.0	925.1	672.0	3,264.1
2011	6,454	3,568	na	10,023	1,885.4	1,236.0	652.0	3,773.4
2012	7,614	3,464	155	11,233	2,192.4	1,016.6	726.0	3,935.0
2013	9,782	4,982	142	14,906	3,220.4	1,087.2	776.5	5,084.1
2014e	11,600	4,400	na	16,000	3,160.0	970.0	600.0	4,730.0
2015f	13,000	4,400	100	17,500	3,500.0	1,100.0	600.0	5,200.0

e = estimate
f = forecast

Source: University of Utah, David Eccles School of Business, Bureau of Economic and Business Research

Figure 18.4
Average Rates for 30-year Mortgages

Year	Mortgage Rates	Year	Mortgage Rates	Year	Mortgage Rates
1968	7.03%	1984	13.87%	2000	8.06%
1969	7.82%	1985	12.42%	2001	6.97%
1970	8.35%	1986	10.18%	2002	6.54%
1971	7.55%	1987	10.19%	2003	5.80%
1972	7.38%	1988	10.33%	2004	5.84%
1973	8.04%	1989	10.32%	2005	5.87%
1974	9.19%	1990	10.13%	2006	6.40%
1975	9.04%	1991	9.25%	2007	6.38%
1976	8.86%	1992	8.40%	2008	6.10%
1977	8.84%	1993	7.33%	2009	5.04%
1978	9.63%	1994	8.36%	2010	4.69%
1979	11.19%	1995	7.95%	2011	4.45%
1980	13.77%	1996	7.81%	2012	3.66%
1981	16.63%	1997	7.60%	2013	3.98%
1982	16.09%	1998	6.95%	2014*	4.22%
1983	13.23%	1999	7.43%		

* Through October

Source: Freddie Mac

present time, construction activity is appropriate for market demand and is needed in order to maintain a healthy supply-demand balance in many areas. High levels of construction, while tapering off somewhat in some sectors, are expected in 2015.

2015 Outlook

Utah's construction sector will see modest improvement in 2015. The value of permit authorized construction is expected to increase by about 10 percent to $5.2 billion in 2015. The value of residential construction will account for two-thirds of total permit authorized construction valuation. Residential construction activity will include 17,500 residential units valued at $3.5 billion. Single family units will increase from 11,600 units in 2014 to 13,000 units in 2015 while the number of multifamily units will remain largely unchanged at around 4,400 units.

As job growth and reduced vacancies in office, retail and industrial buildings spur new development permit authorized non-residential construction activity will increase marginally to about $1.1 billion, up from $970 million in 2014. Additions, alterations, and repairs (residential and non-residential) will add another $600 million to constructional valuation in 2015.

The largest construction project for the near-future will be the Terminal Redevelopment Program at Salt Lake City International Airport, which commenced development in late 2014. Like all government projects the airport expansion is not a permit authorized project; consequently the construction value is not included in the non-residential permit authorized data. Nevertheless, the expansion of the Salt Lake International Airport will be one of the largest construction projects in Utah's history. The ten year project has an estimated cost of $1.8 billion. Big-D Construction/ Holder Construction was awarded the construction contract in October 2013. In 2015, construction on the rental car facility will be completed and construction of the new terminal and west concourse will begin.

Only a few projects have been larger than the redevelopment of the Salt Lake International Airport. The Intermountain Power Plant near Delta Utah built in the 1980s at an inflation adjusted cost of over $3 billion. The reconstruction of I-15 in Salt Lake County prior to the 2002 Olympics with a price tag over $2 billion. The Central Utah Water Project, built over decades, at a cost of $2 billion, and the recently completed $1.8 billion reconstruction of I-15 in Utah County. Two other recent projects are close in size: City Creek Center in downtown Salt Lake City at $1.5 billion and the National Security Administration (NSA) data center near Bluffdale completed in 2013 at $1.5 billion.

Figure 18.5
Housing Price Index for Utah

Year	Index	Year-Over Percent Change	Year	Index	Year-Over Percent Change
1992	110.1	8.0%	2004	218.1	5.7%
1993	125.7	14.2%	2005	243.0	11.4%
1994	146.3	16.3%	2006	284.1	16.9%
1995	159.9	9.3%	2007	319.0	12.3%
1996	172.5	7.9%	2008	304.6	-4.5%
1997	178.8	3.7%	2009	273.0	-10.4%
1998	185.0	3.4%	2010	255.7	-6.3%
1999	189.9	2.6%	2011	239.0	-6.5%
2000	194.0	2.2%	2012	257.0	5.6%
2001	197.6	1.8%	2013	285.0	11.1%
2002	201.1	1.8%	2014e	297.9	5.0%
2003	206.3	2.6%			

e = estimate

Notes:
1. 1991 Q1 = 100
2. Includes Purchases Only

Sources: Federal Housing Finance Agency

Energy

Utah continues to experience significant annual increases in crude oil production, stemming from healthy crude oil prices spurring exploration and development in the Uinta Basin. In contrast, natural gas production retreated from record-highs as prices have softened in the past few years. Coal production in 2014 is still near a 30-year low, as demand in Nevada and California diminishes as coal plants convert to natural gas. Production of electricity in Utah increased for the second straight year, lifted by a growing economy. Utah's average cost of electricity remained well below the national average, mainly due to our reliance on established, low-cost, coal-fired generation. Consumption of petroleum products and natural gas increased in 2014, whereas coal consumption dropped. Utah will continue to be a net-exporter of energy by producing more natural gas, coal, and electricity than is used in-state, but will remain reliant on other states and Canada to satisfy our demand for crude oil and petroleum products.

Petroleum

Production

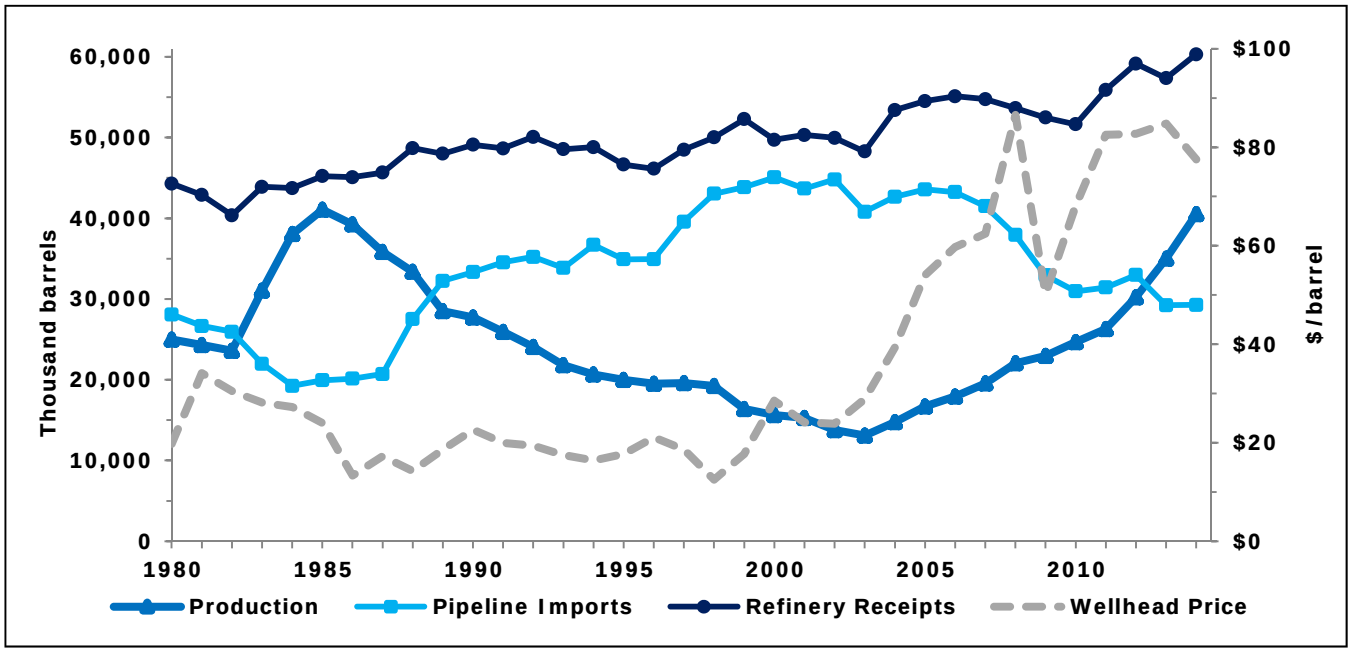
Crude oil production in Utah has experienced a substantial resurgence over the past 11 years due to new discoveries in central Utah and increased exploration and development in the Uinta Basin, the latter fueled by dramatic increases in crude oil prices over the years. Crude oil production increased to 40.5 million barrels in 2014, up 15.7 percent from 2013, and over triple the production achieved in 2003. Total crude oil pipeline imports have dropped significantly in the past few years from an average of 42.6 million barrels between 2000 and 2008 to 29.3 million barrels in 2014, making room at Utah refineries for the increase in statewide production. Of particular note, imports from Canada continue to decrease, dropping from 3.1 million barrels in 2013 to 3.0 million barrels in 2014, significantly less than the record 12.2 million barrels delivered in 2002. Refinery receipts, the amount of crude oil delivered to Utah's five refineries, increased in 2014 to a new record-high of 60.3 million barrels of crude oil. This increase is the result of greater demand from a recovering economy, increasing crude supply from the Uinta Basin, and a small increase in overall refinery capacity.

Historically, crude oil from southeastern Utah was the only crude exported out of state via pipeline to New Mexico. The waxy nature of the Uinta Basin's crude oil always precluded it from easy export; however, due to the dramatic increase in Uinta Basin production coupled with limited capacity at Utah refineries, crude oil from the basin has recently been loaded onto trains, using heated rail cars, for export to California and markets in the east. Crude oil exports ticked up to about 8.4 million barrels in 2014 and will continue to rise with increasing production in the Uinta Basin.

Prices and Value

Utah's crude oil price was strong for most of 2014 (in the mid -$80 per barrel range), but then decreased dramatically at the end of the year, collapsing to the mid-$40 per barrel range.

Figure 19.1
Utah's Crude Oil Production, Pipeline Imports, and Refinery Receipts Plotted with Wellhead Price



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

Figure 19.2
Supply, Disposition, Price, and Value of Crude Oil in Utah

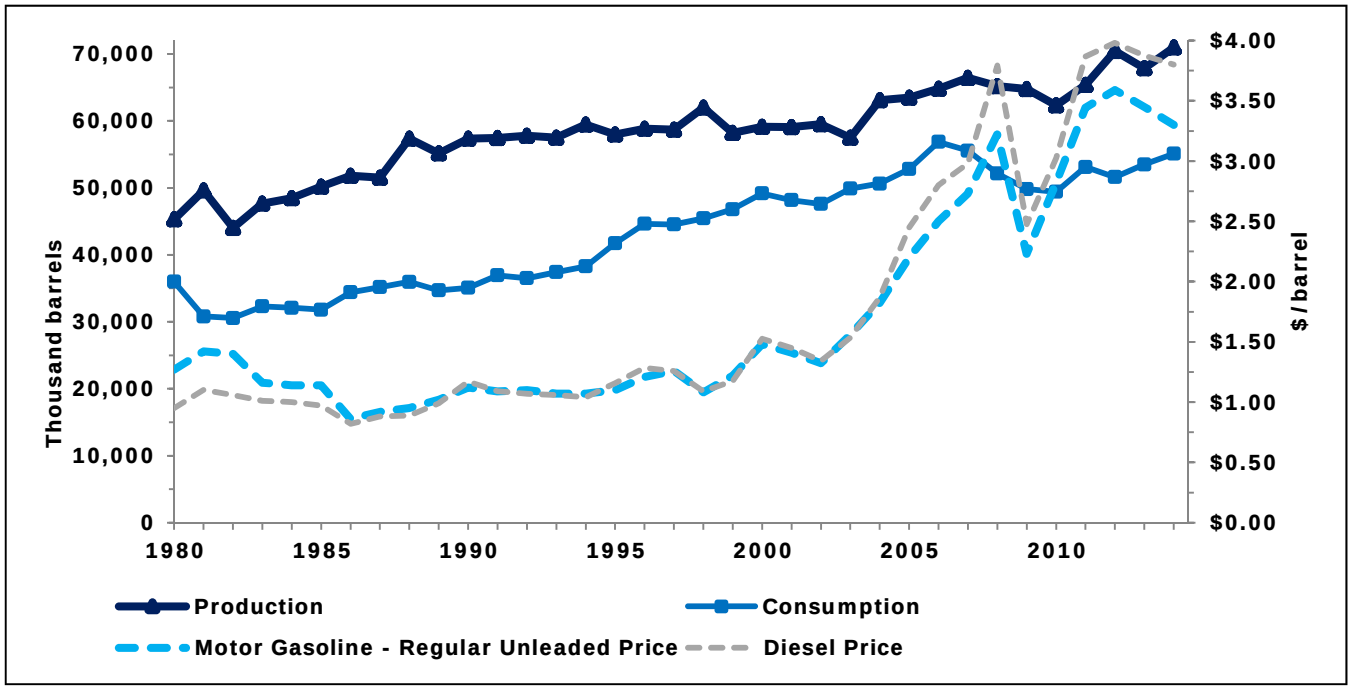
	Supply[1]				Disposition				Price	Value
Year	Utah Crude Production	Colorado Imports	Wyoming Imports	Canadian Imports	Utah Crude Exports[2]	Refinery Receipts	Refinery Inputs	Refinery Beginning Stocks	Wellhead	Value of Utah Crude Oil
	Thousand barrels				Thousand barrels				$/barrel	Million $
1980	24,979	15,846	12,233	0	8,767	44,291	44,421	665	19.79	494.3
1981	24,309	14,931	11,724	0	8,088	42,876	43,007	762	34.14	829.9
1982	23,595	13,911	12,033	0	9,167	40,372	40,368	593	30.50	719.7
1983	31,045	14,696	7,283	0	9,123	43,901	43,844	632	28.12	873.0
1984	38,054	13,045	6,195	0	13,549	43,745	43,544	606	27.21	1,035.4
1985	41,080	13,107	6,827	0	15,790	45,224	45,357	695	23.98	985.1
1986	39,243	12,567	7,574	0	14,298	45,086	45,034	559	13.33	523.1
1987	35,829	13,246	7,454	0	10,875	45,654	45,668	613	17.22	617.0
1988	33,365	12,783	14,739	0	12,197	48,690	48,604	599	14.24	475.1
1989	28,504	13,861	18,380	0	12,756	47,989	47,948	626	18.63	531.0
1990	27,705	14,494	18,844	0	11,939	49,104	48,977	656	22.61	626.4
1991	25,928	14,423	20,113	0	11,817	48,647	48,852	749	19.99	518.3
1992	24,074	13,262	21,949	0	9,206	50,079	49,776	513	19.39	466.8
1993	21,826	11,575	22,279	0	7,126	48,554	48,307	645	17.48	381.5
1994	20,668	10,480	26,227	0	8,573	48,802	48,486	691	16.38	338.5
1995	19,976	9,929	24,923	60	8,247	46,641	46,634	806	17.71	353.8
1996	19,529	9,857	24,297	783	8,340	46,126	46,265	768	21.10	412.1
1997	19,593	8,565	28,162	2,858	10,686	48,492	48,477	633	18.57	363.8
1998	19,218	8,161	28,779	6,097	12,238	50,017	49,476	613	12.52	240.6
1999	16,362	7,335	28,461	8,067	7,954	52,271	50,556	704	17.69	289.4
2000	15,609	7,163	26,367	11,528	10,951	49,716	49,999	786	28.53	445.3
2001	15,269	7,208	25,100	11,364	8,631	50,310	50,143	457	24.09	367.8
2002	13,771	7,141	25,455	12,215	8,620	49,962	49,987	591	23.87	328.7
2003	13,097	6,964	24,152	9,690	5,636	48,267	48,284	547	28.88	378.3
2004	14,744	7,559	22,911	12,195	4,009	53,400	53,180	532	39.35	580.2
2005	16,681	8,214	24,372	10,991	5,744	54,513	54,544	767	53.98	900.4
2006	17,929	9,355	23,256	10,633	6,054	55,119	55,192	728	59.70	1,070.4
2007	19,537	10,708	22,012	8,769	6,261	54,764	54,952	662	62.48	1,220.7
2008	22,041	10,259	21,316	6,382	6,361	53,637	53,165	473	86.58	1,908.3
2009	22,942	7,409	20,000	5,520	3,396	52,475	52,479	519	50.22	1,152.2
2010	24,669	6,525	20,144	4,278	3,978	51,637	51,678	511	68.09	1,679.7
2011	26,285	6,997	20,536	3,894	1,812	55,900	55,656	473	82.53	2,169.3
2012	30,195	7,805	20,769	4,394	4,010	59,153	58,961	692	82.73	2,498.0
2013	35,002	7,601	18,509	3,111	6,879	57,345	56,921	669	84.78	2,967.5
2014e	40,500	7,750	18,550	2,975	9,475	60,300	60,550	798	77.50	3,138.8

e = estimate
[1]Out-of-state imports only include pipeline shipments; minor imports may arrive by truck, and additional minor imports may come from other states.
[2]Estimated by subtracting refinery receipts from total supply; it is assumed that all crude oil imports are 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

Figure 19.3
Utah's Petroleum Product Production and Consumption Plotted with Motor Gasoline and Diesel Prices



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

Overall, the average 2014 price per barrel of crude oil equaled about $78, still well above historical averages. Healthy prices for most of the year, coupled with increasing production, pushed the value of Utah's produced crude oil to a new all-time high of $3.1 billion in 2014, even when accounting for inflation. Utah's average price for regular unleaded motor gasoline and diesel in 2014 decreased to $3.30 and $3.80 per gallon, respectively, down as a result of the year-end collapse in crude oil prices.

Consumption
Utah's refined petroleum production increased to 71.0 million barrels in 2014, a new all-time high. As a result, refined petroleum product imports from Wyoming via the Pioneer pipeline decreased 16.6 percent to 12.7 million barrels in 2014 and are 37 percent lower than peak imports of 20.3 million barrels recorded in 2005. As demand increases with the growing economy, Utah's total petroleum product consumption is estimated to increase for the second straight year to 55.1 million barrels. In 2014, Utah refineries exported 26.7 million barrels of petroleum products via pipeline to other states. Utah exports increased in 2012 as petroleum products started flowing via a new pipeline from Salt Lake City to Las Vegas.

Natural Gas
Production
Utah's natural gas production peaked in 2012 at 491 billion cubic feet (Bcf), but has since retreated to 460 Bcf in 2014, as prices have softened. Dry production and actual natural gas sales also decreased to 445 and 405 Bcf, respectively, while natural gas liquids have increased to 9.1 million barrels as companies seek more valuable "wet" gas. Roughly 9 percent of natural gas production was from coalbed methane wells, but this percentage has been decreasing as numerous new conventional wells are drilled in the Uinta Basin and existing coalbed methane wells have declining production rates. Several shale gas exploratory wells have been drilled in Utah over the past few years, but only a few wells in the Uinta Basin have recorded minor natural gas production from a shale formation.

Prices and Value
The average wellhead price for natural gas in Utah increased 13.6 percent, from $3.70 per thousand cubic feet (Mcf) in 2013 to $4.20 in 2014. However, this increase has yet to translate into higher production rates. The average price of residential natural gas was $9.44 per Mcf in 2014, 10.4 percent higher than the 2013 price of $8.55. Even with declining production, the higher average price of natural gas in 2014, coupled with an increase in the production of natural gas liquids, pushed the overall value of natural gas production to $2.3 billion, the second highest value in nominal dollars.

Consumption
Estimated 2014 natural gas consumption in Utah increased 3.5 percent in 2014 to 255 Bcf, a new record high. Consumption decreased in the residential and commercial

Figure 19.4
Supply, Disposition, and Select Prices of Petroleum Products in Utah

	Supply			Consumption by Product					Exports	Prices	
Year	Refined Product Production	Refinery Beginning Stocks	Refined Product Pipeline Imports[1,2]	Motor Gasoline	Jet Fuel	Distillate Fuel	All Other	Total	Pipeline Exports to Other States[1,3]	Motor Gasoline - Regular Unleaded	Diesel
	Thousand barrels			Thousand barrels					Thousand barrels	$/gallon	
1980	45,340	3,202	6,427	15,534	2,637	8,401	9,412	35,984	22,136	1.27	0.95
1981	49,622	3,376	7,401	15,548	2,424	7,098	5,742	30,812	23,630	1.42	1.10
1982	44,011	2,979	8,933	15,793	2,801	6,438	5,531	30,563	22,119	1.40	1.06
1983	47,663	3,153	6,943	15,954	3,284	6,387	6,691	32,316	25,298	1.16	1.01
1984	48,493	2,842	8,215	16,151	3,413	6,107	6,430	32,101	24,121	1.14	1.00
1985	50,188	2,989	8,030	16,240	3,808	5,715	6,046	31,809	23,365	1.14	0.97
1986	51,822	2,803	8,766	17,541	4,335	6,978	5,552	34,406	20,027	0.86	0.82
1987	51,519	2,661	8,695	17,623	4,969	6,507	6,074	35,172	20,359	0.92	0.88
1988	57,354	2,306	8,926	18,148	4,977	7,060	5,787	35,971	22,031	0.95	0.89
1989	55,184	2,685	9,550	17,311	5,095	5,917	6,372	34,694	21,409	1.02	0.99
1990	57,349	3,000	10,647	16,724	5,281	7,162	5,915	35,082	21,419	1.12	1.17
1991	57,446	2,758	11,459	17,395	5,917	7,038	6,583	36,933	21,918	1.09	1.09
1992	57,786	2,746	10,534	17,905	5,607	7,286	5,726	36,524	21,087	1.10	1.07
1993	57,503	2,840	10,707	18,837	5,518	7,422	5,645	37,422	19,539	1.07	1.06
1994	59,458	3,173	11,555	19,433	5,270	7,653	5,919	38,275	21,326	1.07	1.04
1995	57,974	2,907	12,289	20,771	5,658	8,469	6,820	41,718	20,512	1.10	1.16
1996	58,852	3,253	12,692	21,170	6,303	8,746	8,410	44,628	20,512	1.21	1.29
1997	58,677	2,640	12,949	22,024	6,279	9,976	6,249	44,529	22,444	1.26	1.26
1998	62,012	2,908	12,842	22,735	6,379	10,398	5,940	45,452	22,474	1.08	1.09
1999	58,201	2,780	14,509	23,141	7,443	9,793	6,429	46,806	22,887	1.22	1.18
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	48,167	23,937	1.41	1.45
2002	59,514	2,739	16,848	24,158	6,416	11,482	5,394	47,607	24,082	1.32	1.34
2003	57,511	2,846	16,515	24,325	6,758	11,731	6,916	49,897	22,729	1.56	1.54
2004	63,071	2,599	18,486	24,744	7,137	12,264	6,288	50,625	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	6,438	52,136	21,619	3.22	3.79
2009	64,752	2,715	13,138	25,324	5,751	12,852	5,904	49,831	21,043	2.23	2.48
2010	62,310	2,665	12,307	24,761	5,875	12,707	6,071	49,414	21,490	2.82	3.03
2011	65,369	2,689	11,383	25,568	5,767	15,448	6,330	53,113	23,058	3.44	3.87
2012	70,456	2,860	13,316	25,037	5,572	14,776	6,229	51,614	26,695	3.59	3.98
2013^	67,892	3,077	15,204	25,411	6,399	15,376	6,307	53,493	26,654	3.45	3.88
2014e	70,956	2,676	12,687	26,553	5,866	16,087	6,590	55,096	26,734	3.30	3.80

^Refined product production and consumption was estimated
e = estimate
[1]Amounts shipped by truck are unknown.
[2]The Pioneer pipeline, originating from Sinclair, WY, 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 gets 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

sectors, but greatly increased (27.2 percent) in the electric utilities sector with the startup of additional units at PacifiCorp's Lakeside power plant. Consumption in the industrial sector also increased by 6.0 percent in 2014 to 40.3 Bcf, but still well below peak industrial consumption of 45.5 Bcf reached in 1998. Utah only consumes 56 percent of in-state production, making Utah a net exporter of natural gas.

Coal

Production

Utah coal production increased slightly by 1.5 percent in 2014 to 17.2 million short tons, well below the 24.5 million tons averaged in the 2000s. This decrease started during the 2008 recession, but demand has not rebounded like other energy commodities, as coal has dropped out of favor as a fuel for electric and industrial needs. The Dugout Canyon mine suspended longwall operations in 2012 due to low domestic demand, but the Skyline and Sufco mines both increased production slightly after finding modest export markets. The West Ridge mine is scheduled to shutdown in early 2016 and shift longwall operations to the Lila Canyon mine. Production at the Deer Creek mine has decreased due to labor disputes and depletion of reserves (with an announced closure in mid-2015), while the nearby Castle Valley mine has kept steady production of one million tons per year. The Horizon mine closed in 2012 after filing for bankruptcy, whereas the Coal Hollow mine (Alton) has increased production to about 600,000 tons per year from their open pit mine.

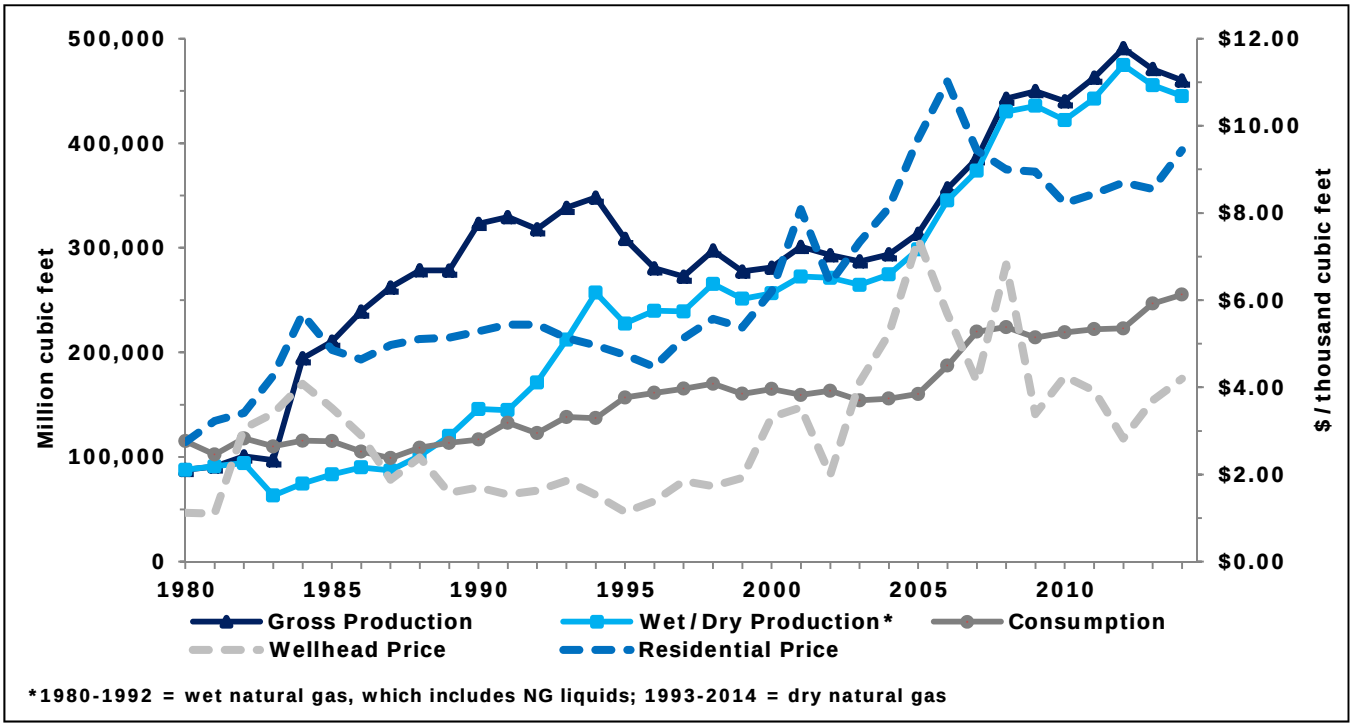
Prices and Value

The average mine-mouth price for Utah coal decreased 3.2 percent in 2014 to $33.08 per short ton, still a relatively-high price in nominal dollars (third highest in history), but well below the inflation-adjusted high of $96 per ton reached in 1976. Prices will most likely soften over the next few years as demand remains weak. In contrast, the end-use price of coal at Utah electric utilities, which includes transportation costs, increased 2.4 percent to $46.50 per ton in 2014, a new record in nominal dollars. The value of coal produced in Utah totaled $569 million in 2014, well below the inflation-adjusted high of $1.2 billion recorded in 1982.

Consumption

Approximately 15.7 million short tons of coal were consumed in Utah in 2014, 96 percent of which was burned at electric utilities. Demand for coal in Utah has declined in recent years with decreasing demand for electricity and will decrease by another 600,000 tons after PacifiCorp's Carbon plant shuts down in 2015. Coke consumption in Utah ended in 2002 when Geneva Steel went out of business, while coal sales for industrial use, mostly cement and lime companies, rebounded slightly to 654,000 tons, but is only half of peak demand of 1.3 million tons reached in 1998. Although Utah imports some coal, it has always been a net exporter, with 3.5 million tons of coal going to other states and countries in 2014, down 6.4 percent from 2013 and down a dramatic 64 percent from

Figure 19.5
Utah's Natural Gas Production and Consumption Plotted with Wellhead and Residential Prices



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

Figure 19.6
Supply, Disposition, Prices, and Value of Natural Gas in Utah

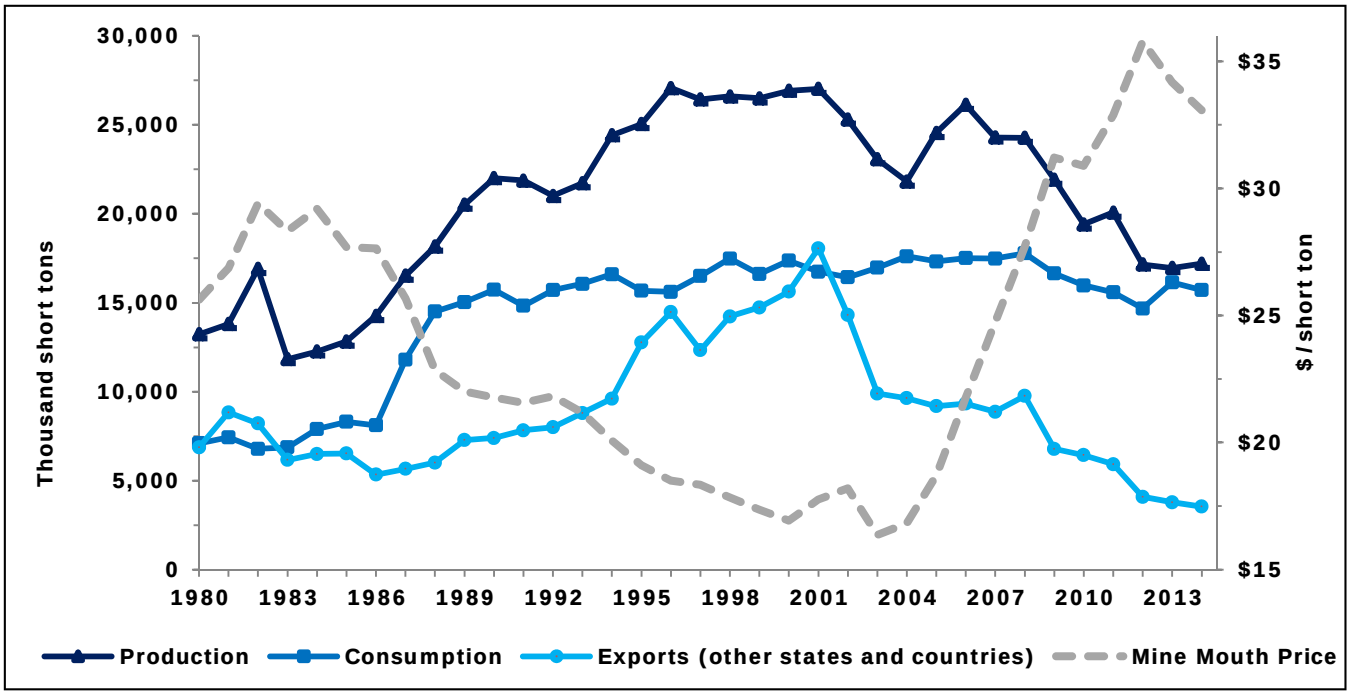
	Supply				Consumption by End Use							Prices					Value
Year	Gross Production	Wet/Dry Production[1]	Actual Sales	Natural Gas Liquids Production	Residential	Commercial	Vehicle Fuel	Industrial	Electric Utilities	Lease, Plant, & Pipeline	Total	Wellhead	End-Use Residential	End-Use Commercial	End-Use Industrial	Natural Gas Liquids	Value of NG and NGL
	Million cubic feet			Thousand bbl	Million cubic feet							$/thousand cubic feet				$/bbl	Million $
1980	87,766	87,766	na	na	45,735	12,234	0	43,545	5,133	8,445	115,092	1.12	2.74	5.59	2.26	na	98.3
1981	90,936	91,191	na	na	43,497	11,635	0	42,779	3,097	1,232	102,240	1.10	3.23	5.35	2.58	na	100.3
1982	100,628	94,255	na	na	53,482	14,306	0	39,804	3,023	7,091	117,706	3.06	3.41	3.43	2.45	na	288.4
1983	96,933	63,158	na	na	49,645	13,279	0	40,246	1,259	5,756	110,185	3.40	4.26	4.32	3.15	na	214.7
1984	194,448	74,698	na	na	49,869	13,339	0	42,709	271	9,390	115,578	4.08	5.68	4.96	3.52	na	304.8
1985	210,267	83,405	na	na	53,043	14,189	0	37,448	235	10,202	115,117	3.52	4.86	4.91	3.23	na	293.6
1986	239,259	90,013	na	na	49,144	13,146	0	28,264	230	14,391	105,175	2.90	4.64	4.73	3.00	na	261.0
1987	262,084	87,158	na	na	41,536	14,811	0	23,884	263	18,493	98,987	1.88	4.97	4.98	3.20	na	163.9
1988	278,578	101,372	na	na	42,241	17,911	0	30,354	196	18,251	108,953	2.39	5.11	4.08	3.10	na	242.3
1989	278,321	120,089	na	na	45,168	16,522	0	33,963	636	17,248	113,537	1.58	5.14	4.16	3.30	na	189.7
1990	323,028	145,875	63,336	na	43,424	16,220	1	35,502	907	20,594	116,648	1.70	5.28	4.30	3.62	na	248.0
1991	329,464	144,817	65,288	na	50,572	19,276	6	43,120	5,190	14,602	132,766	1.54	5.44	4.50	3.69	na	223.0
1992	317,763	171,293	94,725	na	44,701	16,584	150	40,878	6,576	13,895	122,785	1.63	5.44	4.40	3.91	na	279.2
1993	338,276	212,101	137,864	5,365	51,779	22,588	188	42,300	6,305	15,039	138,199	1.86	5.13	4.06	3.67	5.35	422.2
1994	348,140	257,078	160,967	5,374	48,922	26,501	201	36,618	8,900	16,080	137,222	1.53	4.96	3.84	2.74	6.04	425.6
1995	308,695	227,611	164,059	6,360	48,975	26,825	286	42,335	8,707	29,843	156,971	1.14	4.74	3.64	2.34	4.82	289.8
1996	280,439	239,797	179,943	7,204	54,344	29,543	378	42,213	4,087	30,720	161,285	1.39	4.47	3.38	2.10	6.63	380.1
1997	272,554	239,267	183,427	6,007	58,108	31,129	273	44,162	4,079	27,554	165,305	1.85	5.13	3.92	2.55	6.94	484.1
1998	297,503	265,539	201,416	5,750	56,843	30,955	636	45,501	5,945	30,254	170,134	1.73	5.57	4.35	3.00	4.26	483.2
1999	277,494	251,207	205,036	5,574	55,474	30,361	889	40,858	6,478	26,371	160,431	1.92	5.37	4.13	2.94	6.18	517.0
2000	281,170	256,490	225,958	5,150	55,626	31,282	848	39,378	10,544	27,344	165,023	3.31	6.20	4.92	3.93	11.31	908.1
2001	300,961	272,534	247,056	4,641	55,008	30,917	474	33,584	15,141	24,175	159,299	3.54	8.09	6.78	5.29	12.47	1,021.9
2002	293,030	271,387	247,561	3,542	59,398	33,501	482	26,879	15,439	27,681	163,379	1.99	6.39	5.20	3.91	8.91	571.1
2003	287,141	264,654	242,234	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	1,126.8
2004	293,831	274,588	251,841	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	1,494.9
2005	313,519	298,408	275,630	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	2,282.5
2006	356,874	345,409	318,714	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	2,024.6
2007	385,555	373,680	344,534	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	1,627.7
2008	442,573	430,286	401,964	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	3,109.3
2009	449,729	435,673	405,621	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	1,661.1
2010	440,154	422,067	389,168	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	2,087.1
2011	462,619	442,615	404,233	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	2,196.3
2012	490,859	474,756	436,222	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	1,748.8
2013^	470,847	455,454	409,497	8,022	70,491	41,398	324	38,009	48,812	47,690	246,724	3.70	8.55	7.13	5.22	53.69	2,114.6
2014e	460,000	445,000	405,000	9,100	65,700	38,900	320	40,300	62,100	48,000	255,320	4.20	9.44	7.49	5.80	49.00	2,314.9

^Dry production and consumption was estimated
e = estimate
na = not available, NG = natural gas, NGL = natural gas liquids
[1]1980-1992 = wet natural gas, which includes NG liquids; 1993-2014 = dry natural gas.

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

Figure 19.7
Utah's Coal Production, Consumption, and Exports Plotted with Mine Mouth Price



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

2008. The economic downturn hit other states, particularly Nevada and California, the largest out-of-state consumers of Utah coal, much harder than Utah, resulting in much lower demand for coal at electric power facilities and industrial plants. Post-recession, these states have converted many of their coal-fired plants to natural gas, permanently eliminating that demand.

Electricity (Including Renewable Resources)

Production

Electric generation in Utah continues to rebound since the recession-related low posted in 2012. Generation increased 3.1 percent to 44,144 gigawatthours (GWh) in 2014, mostly from increases in natural gas generation from PacifiCorp's new Lakeside expansion. The vast majority of electric generation (77 percent,) came from coal-burning power plants; however, generation from natural gas plants has increased its share of total generation to 18 percent, eight times greater than just nine years ago. Petroleum accounted for 0.1 percent, mainly used as start-up fuel at coal-burning plants, while renewable resources, mostly hydroelectric (1.6 percent), wind (1.6 percent), and geothermal (1.2 percent), provided 4.5 percent of Utah's total electric generation.

Prices

The higher price of coal at electric utilities, the predominant fuel at electric plants, helped increase overall electricity prices in Utah by 3.4 percent in 2014. However, Utah's 2014 average electric rate of 8.5 cents per kilowatthour (kWh) for all sectors of the economy is still 20 percent lower than the national average of 10.4 cents. This is due to Utah's well established coal-fired power plants, which supply 77 percent of electricity generation in the state. The residential price of Utah's electricity increased 2.7 percent in 2014 to 10.7 cents per kWh and is much lower than the national average of 12.6 cents per kWh.

Consumption

After recording the first electricity consumption decline in over 20 years in 2009, demand has continued to increase each year, totaling 30,460 GWh in 2014. In fact, since 1980, electricity consumption has averaged a 3.2 percent increase annually, mirroring Utah's population rate increase (2.1 percent) combined with the increasing rate of consumption per capita (1.2 percent). Utah is a net exporter of electricity, using only 69 percent of in-state electric generation.

Conclusion and Outlook for Utah Energy

Production and Consumption

Crude oil production in Utah is expected to continue to rise next year, albeit not as rapidly as previous years. Any effects on production from lower crude oil prices will take time to materialize and will be dependent on the duration of the lower prices. With Utah refineries at or near capacity, companies will continue to seek other markets (i.e., rail to out -of-state markets). Demand for petroleum products in Utah

Figure 19.8
Supply, Disposition, Price, and Value of Coal in Utah

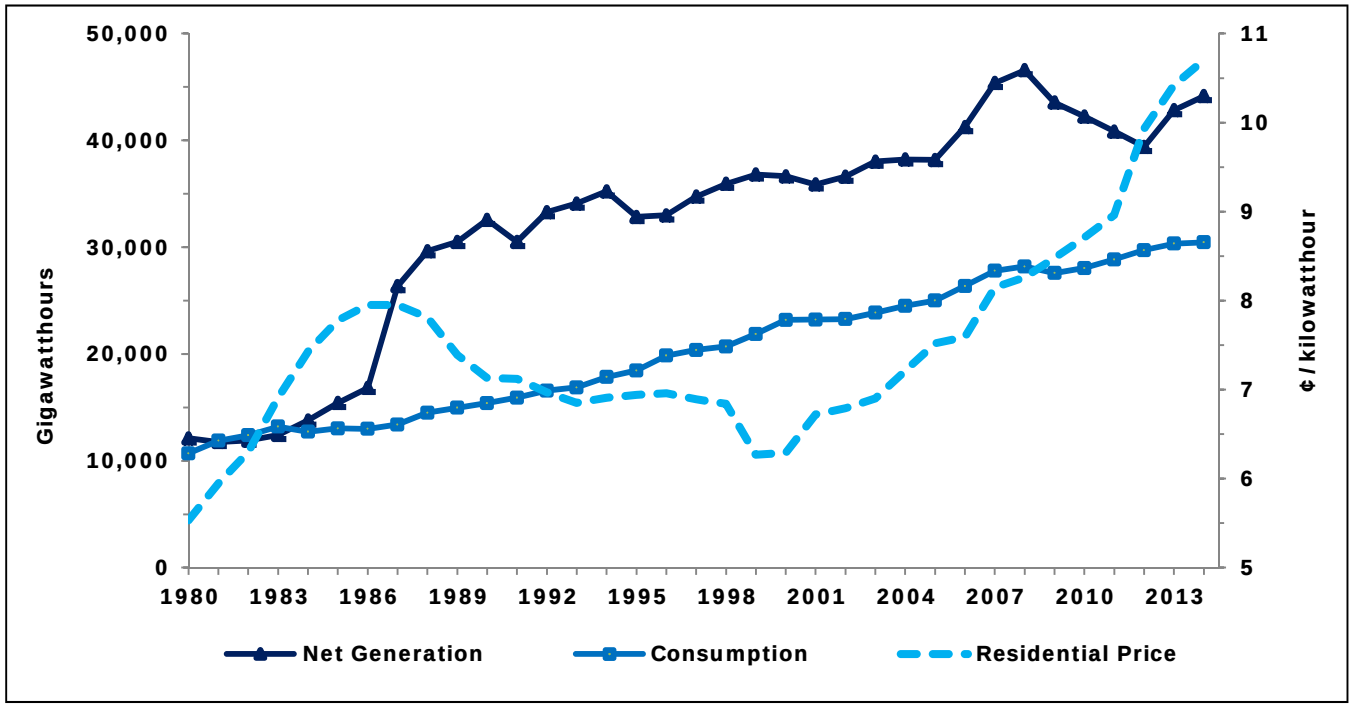
	Supply		Distribution	Consumption by End Use					Exports		Prices		Value
Year	Production	Imports	Total Distribution of Utah Coal	Residential & Commercial	Coke Plants	Other Industrial	Electric Utilities	Total	To Other U.S. States	To Canada and/or Overseas	Mine Mouth	End-Use Electric Utilities	Value of Utah Coal
	Thousand short tons		Thousand short tons	Thousand short tons					Thousand short tons		$/short ton		Million $
1980	13,236	1,214	13,014	237	1,473	501	4,895	7,106	6,100	776	25.63	26.11	339.2
1981	13,808	1,136	14,627	196	1,477	804	4,956	7,433	5,369	3,472	26.87	28.88	371.0
1982	16,912	798	15,397	177	845	818	4,947	6,787	6,044	2,177	29.42	32.55	497.6
1983	11,829	937	12,188	191	831	627	5,223	6,872	4,818	1,346	28.32	30.87	335.0
1984	12,259	1,539	12,074	259	1,326	608	5,712	7,905	5,651	849	29.20	30.63	358.0
1985	12,831	1,580	14,361	252	1,254	472	6,325	8,303	5,901	625	27.69	32.34	355.3
1986	14,269	1,145	13,243	191	785	380	6,756	8,112	4,790	551	27.64	32.39	394.4
1987	16,521	1,358	16,989	124	0	507	11,175	11,806	5,107	555	25.67	29.05	424.1
1988	18,164	2,191	18,204	196	1,176	597	12,544	14,513	4,973	1,044	22.85	28.96	415.0
1989	20,517	2,344	20,289	231	1,178	686	12,949	15,044	5,108	2,175	22.01	28.49	451.6
1990	22,012	2,121	21,507	267	1,231	676	13,563	15,737	5,649	1,751	21.78	26.91	479.4
1991	21,875	2,014	21,435	305	1,192	508	12,829	14,834	5,744	2,086	21.56	27.24	471.6
1992	21,015	2,672	21,036	223	1,114	525	13,857	15,719	5,741	2,260	21.83	27.59	458.8
1993	21,723	2,076	22,221	121	1,005	727	14,210	16,063	5,844	2,959	21.17	27.15	459.9
1994	24,422	2,427	23,196	105	1,007	835	14,656	16,603	6,912	2,698	20.07	25.85	490.1
1995	25,051	1,847	25,522	77	990	915	13,693	15,675	8,837	3,930	19.11	24.84	478.7
1996	27,071	1,785	23,861	94	1,047	512	13,963	15,616	9,167	5,305	18.50	24.36	500.8
1997	26,428	2,840	26,270	123	1,020	709	14,654	16,506	8,898	3,436	18.34	24.87	484.7
1998	26,600	2,543	26,764	113	971	1,304	15,094	17,482	11,698	2,535	17.83	25.66	474.3
1999	26,491	1,938	25,716	114	741	744	15,011	16,610	12,424	2,313	17.36	23.60	459.9
2000	26,920	2,535	27,955	59	984	1,166	15,164	17,373	12,553	3,073	16.93	23.16	455.8
2001	27,024	3,062	26,906	60	547	1,235	14,906	16,748	15,920	2,144	17.76	25.48	479.9
2002	25,299	2,251	24,392	198	0	592	15,644	16,434	13,170	1,142	18.20	21.84	460.4
2003	23,069	2,039	23,551	61	0	611	16,302	16,974	9,584	318	16.36	23.20	377.4
2004	21,818	3,032	23,145	214	0	795	16,606	17,615	9,294	346	16.82	24.95	367.0
2005	24,556	2,776	23,026	45	0	800	16,484	17,329	8,835	351	18.71	24.52	459.4
2006	26,131	1,926	24,520	35	0	871	16,609	17,515	9,279	55	21.77	27.34	568.9
2007	24,288	1,597	24,452	23	0	870	16,593	17,486	8,877	0	24.75	30.33	601.1
2008	24,275	2,528	25,415	0	0	852	16,927	17,779	9,219	541	27.70	30.66	672.4
2009	21,927	4,251	20,489	0	0	722	15,925	16,647	6,643	148	31.21	33.96	684.3
2010	19,406	1,775	19,220	0	0	743	15,233	15,976	5,807	634	30.89	37.68	599.5
2011	20,073	2,020	19,039	0	0	583	15,005	15,588	4,841	1,081	32.89	39.21	660.2
2012	17,155	1,708	16,140	0	0	599	14,084	14,683	3,012	1,080	35.78	42.53	613.8
2013	16,953	1,864	15,206	0	0	593	15,557	16,150	2,674	1,110	34.17	45.39	579.3
2014e	17,200	1,723	14,835	0	0	654	15,057	15,711	2,341	1,200	33.08	46.50	569.0

e = estimate

Note: Prices and values are in nominal dollars.

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

Figure 19.9
Utah's Electricity Net Generation and Consumption Plotted with End-use Residential Price



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

should continue its upward trend as the economy continues to improve. Utah's natural gas production has declined in recent years as prices have softened, but expectations are that natural gas production should rebound in 2016 or 2017 if prices continue their upward trend. There are currently no plans for additional natural-gas power plants in Utah, so consumption should remain relatively steady. Coal production in Utah is expected to drop to the 15 to 16 million ton a year range for the near future, as in-state demand remains steady and out-of-state demand continues to be weak. Production could increase if new foreign export markets are established. Electricity generation should continue to increase in the next few years as the economy improves resulting in higher demand, while electricity consumption in Utah should continue on its upward trend.

Prices

Crude oil prices decreased in 2014 to $78 per barrel following a year-end collapse. It is unclear how long prices will stay at this lower level, but it is possible for 2015 prices to average in the $50 per barrel range. The price of natural gas increased in 2014 to $4.20 per Mcf and is expected to at least stay steady, if not increase slightly, in the coming years. Utah's mine-mouth coal price continues to decrease as demand goes down and is expected to average in the low $30 per ton range in coming years. With regard to electricity, Utah's well established coal-fired power plants will assure affordable, reliable electric power for the foreseeable future and help keep Utah's electricity prices well below the national average.

Figure 19.10
Supply, Disposition, and Price of Electricity in Utah

	Net Generation by Fuel Type									Consumption by End Use					Prices by End Use			
Year	Coal	Petroleum	Natural Gas	Hydro	Geo-thermal	Wind	Other Renewables[1]	Other[2]	Total	Residential	Commercial	Industrial	Total	Residential Consumption Per Capita	Residential	Commercial	Industrial	All Sectors
	Gigawatthours									Gigawatthours				MWh/person	¢/kilowatthour			
1980	10,870	63	358	821	0	0	0	0	12,112	3,116	3,141	4,448	10,705	2.11	5.5	4.3	3.3	4.3
1981	10,869	40	230	623	0	0	0	0	11,762	3,436	2,999	5,451	11,886	2.27	6.0	5.0	3.7	4.7
1982	10,635	29	203	1,024	0	0	0	0	11,891	3,785	3,207	5,399	12,391	2.43	6.3	5.7	4.2	5.2
1983	10,921	40	69	1,394	0	0	0	0	12,424	3,804	3,350	6,040	13,194	2.38	6.9	6.3	4.4	5.6
1984	12,321	30	8	1,391	38	0	0	0	13,788	3,856	4,269	4,592	12,717	2.38	7.4	6.5	4.6	6.0
1985	14,229	40	14	1,019	110	0	0	0	15,412	3,985	4,596	4,458	13,039	2.43	7.8	6.9	5.0	6.4
1986	15,155	74	6	1,413	172	0	0	0	16,819	3,989	4,682	4,318	12,989	2.40	8.0	7.1	5.2	6.6
1987	25,221	92	13	856	164	0	0	0	26,346	3,980	4,863	4,555	13,398	2.37	8.0	7.1	4.9	6.5
1988	28,806	59	5	593	174	0	0	0	29,637	4,151	5,035	5,321	14,507	2.46	7.8	7.0	4.6	6.2
1989	29,676	48	37	562	173	0	0	0	30,496	4,163	5,173	5,629	14,965	2.44	7.4	6.7	4.1	5.8
1990	31,523	52	146	508	152	0	0	182	32,564	4,246	5,389	5,766	15,402	2.46	7.1	6.3	3.8	5.5
1991	28,888	51	550	627	186	0	0	204	30,506	4,460	5,571	5,876	15,907	2.50	7.1	6.1	3.9	5.5
1992	31,553	34	631	602	233	0	0	230	33,284	4,505	5,850	6,212	16,567	2.45	7.0	6.0	3.7	5.3
1993	32,126	37	606	860	187	0	0	281	34,097	4,726	5,920	6,221	16,867	2.50	6.9	6.0	3.8	5.3
1994	33,131	33	807	750	233	0	0	281	35,235	5,009	6,340	6,498	17,847	2.57	6.9	5.9	3.8	5.4
1995	30,611	36	791	969	168	0	0	261	32,836	5,041	6,462	6,957	18,460	2.53	6.9	5.9	3.7	5.3
1996	31,101	47	324	1,049	223	0	0	239	32,983	5,481	6,717	7,660	19,858	2.68	7.0	5.9	3.7	5.3
1997	32,544	47	328	1,344	203	0	0	281	34,747	5,661	7,285	7,430	20,376	2.70	6.9	5.7	3.5	5.2
1998	33,588	35	528	1,315	195	0	0	285	35,945	5,756	7,433	7,511	20,700	2.69	6.8	5.7	3.5	5.2
1999	34,534	31	610	1,255	186	0	8	191	36,815	6,236	8,075	7,568	21,879	2.84	6.3	5.3	3.4	4.9
2000	34,491	58	890	746	186	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	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	218	0	6	5	36,608	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	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	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	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	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	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	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	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	56	210	42,249	8,834	10,402	8,808	28,044	3.18	8.7	7.2	4.9	6.9
2011	33,138	54	5,256	1,230	330	573	58	197	40,836	8,947	10,579	9,333	28,859	3.18	9.0	7.4	5.1	7.1
2012	30,799	40	6,580	748	335	704	61	137	39,403	9,189	10,841	9,694	29,723	3.22	9.9	8.1	5.6	7.8
2013	34,505	35	6,544	634	348	536	59	164	42,825	9,352	10,930	10,051	30,333	3.22	10.4	8.4	5.9	8.2
2014e	33,800	35	8,100	720	520	700	64	205	44,144	9,100	11,110	10,250	30,460	3.09	10.7	8.7	6.2	8.5

e = estimate

[1] Includes solar, landfill gas, and biogenic municipal solid waste.

[2] Includes nonbiogenic municipal solid waste and other manufactured and waste gases derived from fossil fuels.

Note: Prices are in nominal dollars.

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

Minerals

The Utah Geological Survey (UGS) estimates the gross production value of nonfuel mineral commodities produced in Utah in 2014 totaled $4.3 billion, an increase of about $400 million over 2013 estimates. The U.S. Geological Survey reports the 2013 value of Utah's nonfuel minerals production ranks seventh nationally with 4.5 percent of the total U.S. production. The 2014 data were derived primarily from corporate third quarter reports, 2014 corporate production projections reported in 2013, and other sources where available.

2014 Summary

The estimated $4.3 billion total value of mineral industry sectors includes a base metals value of $2.46 billion (58 percent), an industrial minerals value of $1.37 billion (32 percent), and a precious metals value of $444 million (10 percent). Of the nonfuel mineral-producing companies surveyed in 2013, 50 percent of them projected duplicating 2013 production in 2014, 36 percent planned on some production increase, and 14 percent projected less production.

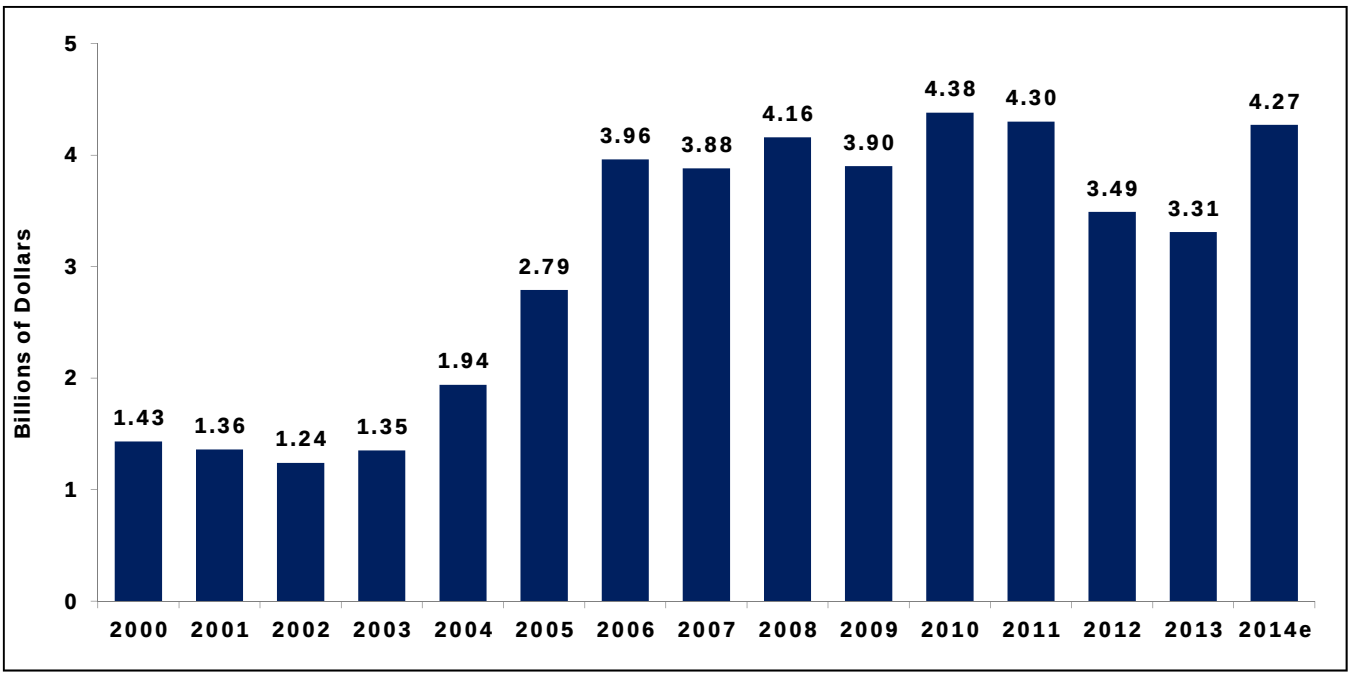
The massive April 2013 Manefay Landslide at Kennecott Utah Copper's (KUC) Bingham Canyon open pit copper-gold -molybdenum-silver mine had a significant negative impact on Utah's nonfuel mineral production value for 2013, and these negative impacts carried over in a smaller way into 2014. Metal production from the Materion beryllium mine, Lisbon Valley copper mine, and CS Mining copper mine remain largely unchanged. However, the CML iron mine west of Cedar City closed in October 2014. Overall, the generally rebounding of 2014 production was partly offset by largely decreasing metal prices.

Continuing low uranium prices resulted in a continued shut down of all uranium mining operations in Utah, which also resulted in the loss of byproduct vanadium production. Nonfuel mineral exploration activities in Utah were lower again in 2014 than the previous year. Industrial minerals value is estimated to increase modestly in 2014 based on company projections from early 2014 and first half reports.

2015 Outlook

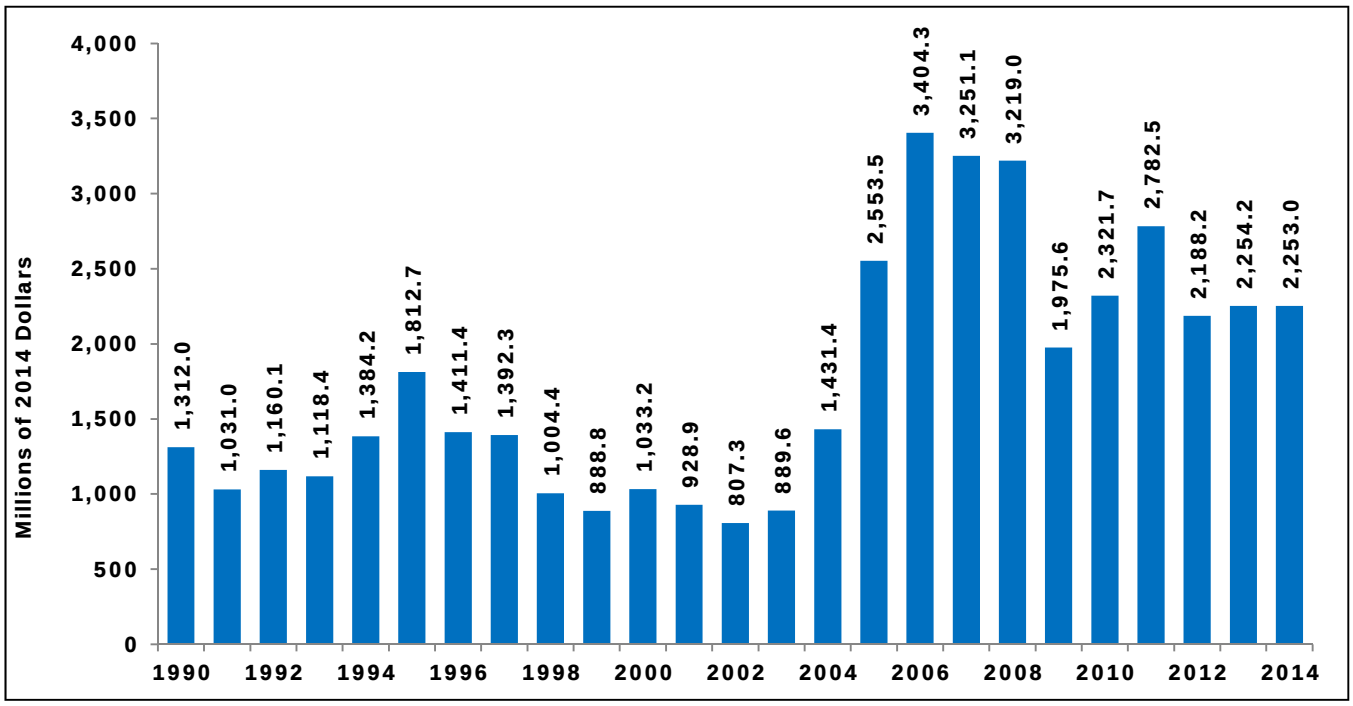
Despite expected modest increases in base and precious metal production, primarily from a recovering Bingham Canyon mine, the projected decline in metal prices will likely result in a small decrease in the total overall value of these metals in 2015. Following significant price drops in late 2013 and early 2014, muriate of potash prices are stabilizing, which should continue into 2015. Other industrial minerals production and value are expected to be relatively stable in 2015, assuming no large swings in the construction industry. The UGS estimates that the gross production value of Utah's nonfuel mineral commodities in 2015 will be flat to slightly below 2014 totals.

Figure 20.1
Total Annual Value of Utah's Nonfuel Mineral Production



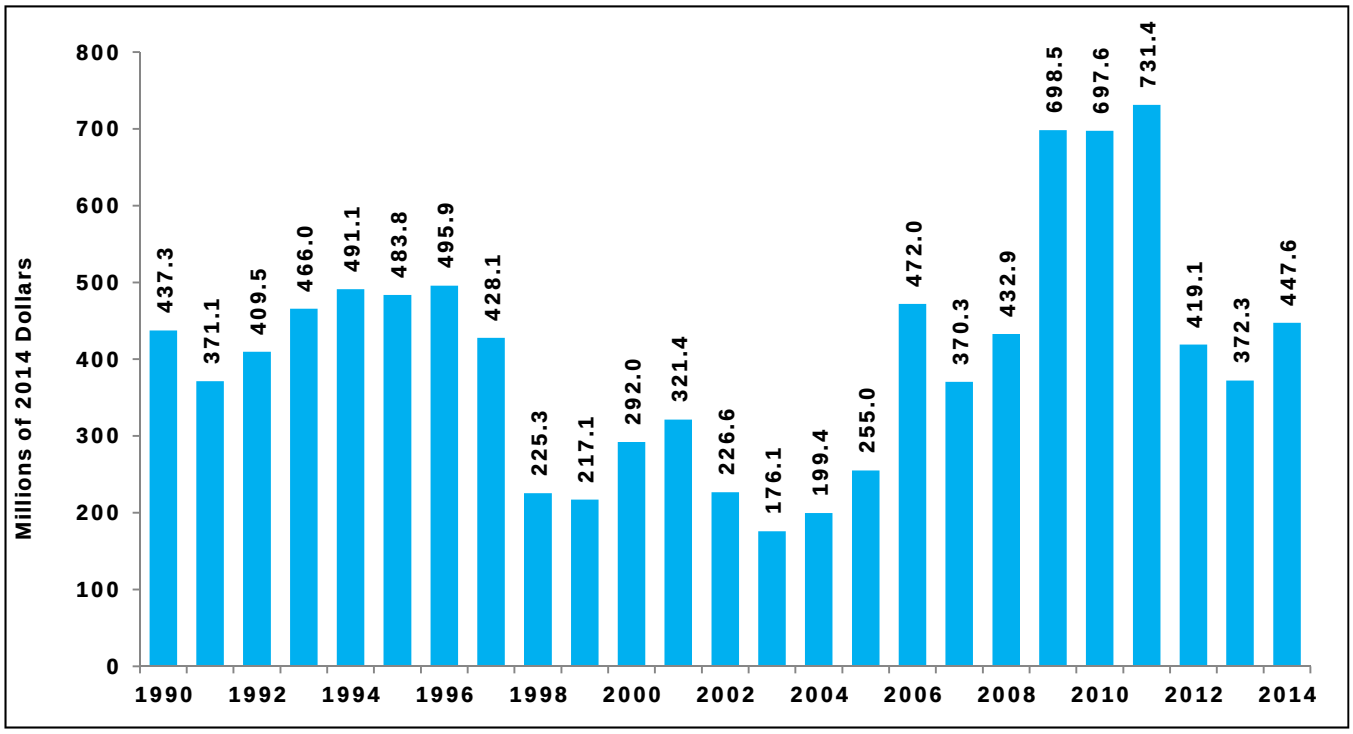
Source: U.S. Geological Survey; estimate by Utah Geological Survey e = estimate

Figure 20.2
Value of Utah's Annual Base Metal Production



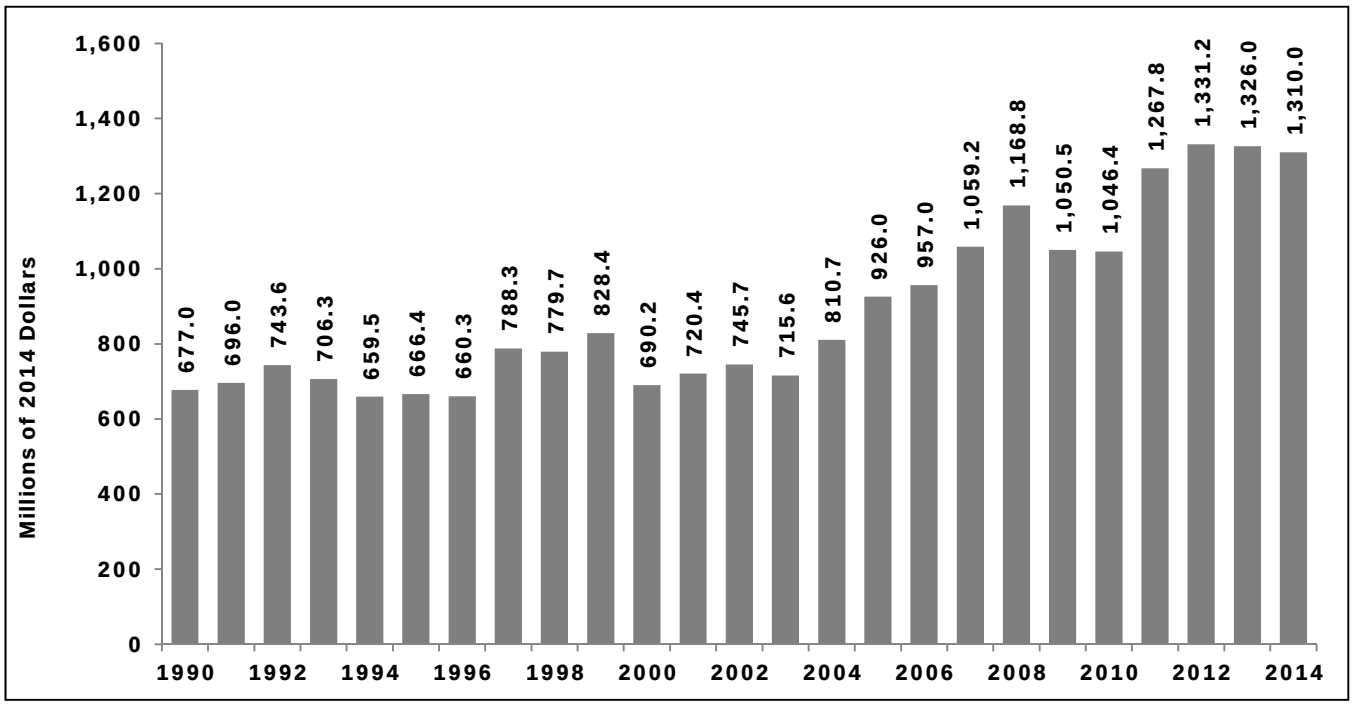
Source: Utah Geological Survey

Figure 20.3
Value of Utah's Annual Precious Metal Production



Source: Utah Geological Survey

Figure 20.4
Value of Utah's Annual Industrial Metal Production



Source: Utah Geological Survey

Tourism, Travel, and Recreation

Utah's tourism and travel sector experienced year-over growth during the first half of 2014, including increases in state and local tourism-related tax revenues, leisure and hospitality taxable sales, tourism-related jobs and wages, and park and ski resort visits. Tourism and travel sector increases mirror the success of the Utah Office of Tourism's 2013/14 "Mighty 5" and winter advertising campaigns, which were funded by the state's Tourism Marketing Performance Fund and promote Utah's five national parks and accessible world-class ski resorts. Compared to the first half of 2013, during the first half of 2014, visitors purchased more Utah hotel rooms and spent more money on arts, entertainment, recreation, restaurants, and retail, which in turn created additional tourism-related jobs. Ski Utah reported the third most skier visits on record during the 2013/14 ski season and 2014 national and state park visits were trending above 2013 visits.

2014 Summary

Tourism-related taxes, such as transient room, restaurant, short term leasing, and resort communities sales taxes, increased from 8 percent to 19 percent from fiscal year 2013 to fiscal year 2014. In many instances, relatively large tourism-related tax revenue increases are due to a greater number of localities enacting the tourism taxes or raising their tourism tax rates. During the first half of 2014, 22 of 29 counties in Utah experienced increases in tourism-related tax revenues.

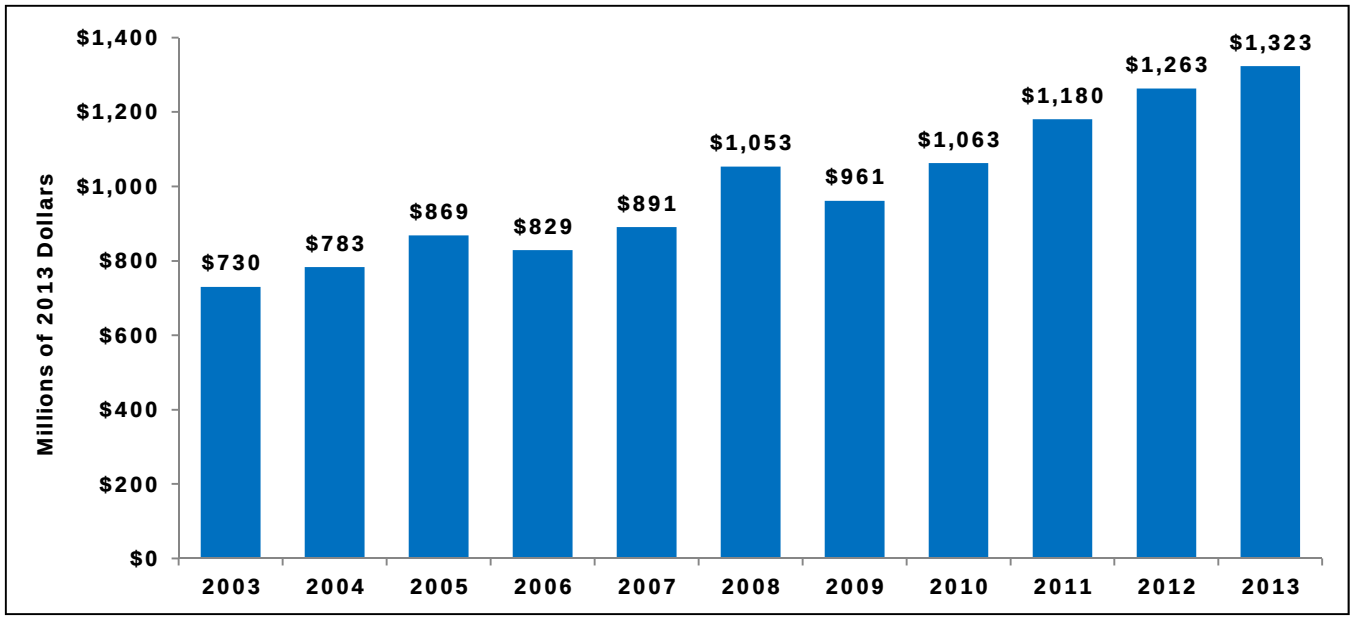
Total taxable sales in the leisure and hospitality sector increased 7 percent during the first half of 2014, while gas stations, grocery stores, and tourism-related retail sales increased anywhere from 2 to 4 percent. Likewise, 25 of 29 counties reported growth in leisure and hospitality taxable sales.

Tourism-related jobs in Utah's private leisure and hospitality sector increased 6 percent, double the growth rate of all other private Utah jobs combined (3 percent). However, leisure and hospitality sector wages, adjusted for inflation, increased 4 percent while wages for all other private jobs increased 5 percent. Tourism-related employment and wages are expected to increase at a similar pace in future years.

According to Smith Travel Research, during the first half of 2014, statewide occupancy, average daily rate and revenue per available room increased 3 percent, 4 percent, and 8 percent, respectively. Within the same period of time, 15 of 24 counties in Utah reported improved hotel performance measures. The greatest increases in overall Utah hotel performance occurred during the second quarter of 2014 (April, May and June). In fact, Smith Travel Research reported that, on a national basis, average occupancy was at a record high in July of 2014.

Travel research firm TNS Global, reported total Utah person-trips during the first six months of 2014 had increased an estimated 12 percent from 2013, with an 18 percent increase in nonresident visitors. Similarly, during the first three quarters of 2014, total visits to Utah's five national parks and places had increased 10 percent from the previous year, while

Figure 21.1
Hotel Room Rents



Source: Bureau of Economic and Business Research Analysis of Utah State Tax Commission data

Grand Staircase-Escalante National Monument reported a 16 percent increase in visitation in federal fiscal year 2014. Arches National Park visitation had reported the greatest increase in visitation (14 percent) at the time of this publication. State park visits in July and August of 2014 had increased 12 percent from the same two months in 2013. Ski Utah reported 4.2 million skier visits during the 2013/14 ski season, making it the third best season on record.

There have been several newsworthy tourism-related events in 2014. In February, the Utah State Legislature passed legislation that provides an incentive for the construction of a new convention hotel in Salt Lake City. According to Visit Salt Lake, the existing Salt Palace Convention Center in downtown Salt Lake City experienced record-setting attendance in 2014, not only at the Outdoor Retailer Summer Market, but also at six other tradeshows and conventions. It is estimated that attendees of the over 54 national, international and regional events hosted at the Salt Palace in 2014 spent close to $300 million in the local economy, stimulating additional jobs, income and tax revenue.

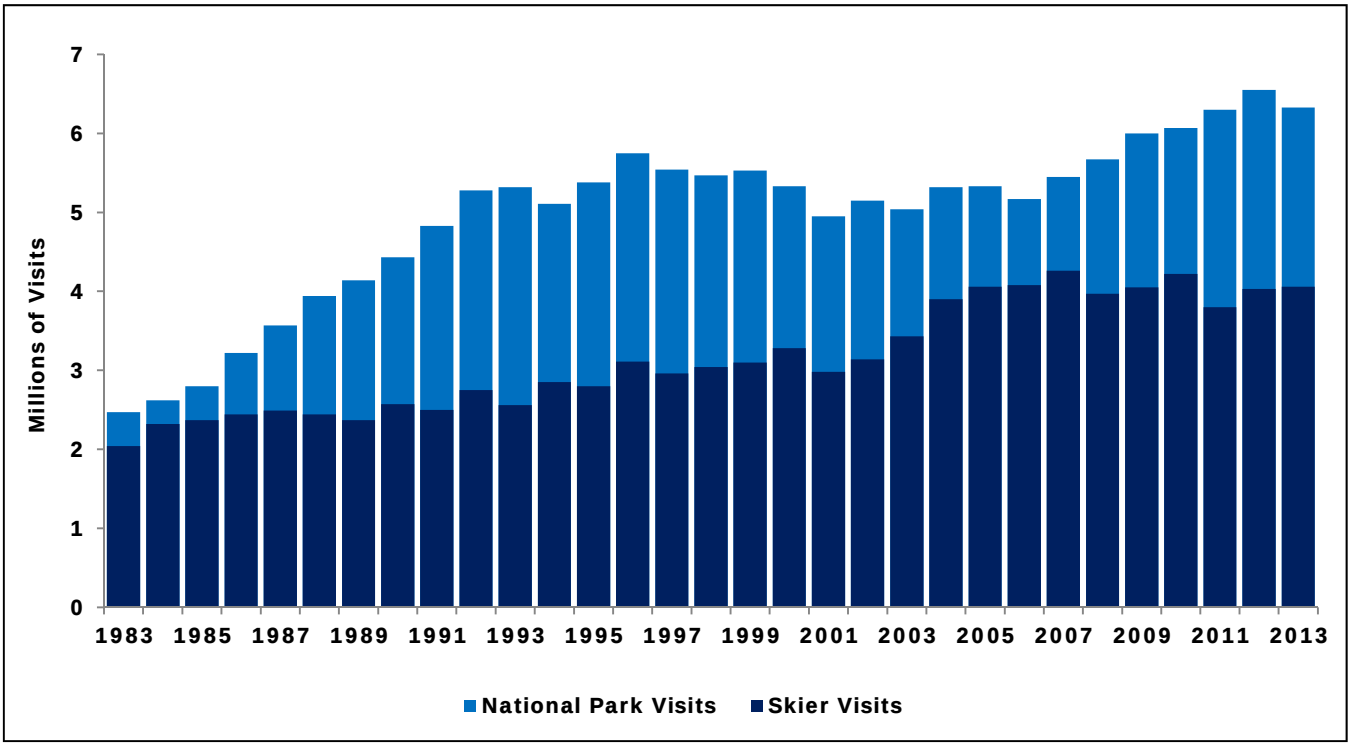
In September, Visit Salt Lake announced its "Ski City" marketing campaign to promote the proximity of an urban hub to four world-class ski areas. During the same month, Colorado-based Vail Resorts announced its purchase of Park City Mountain Resort and its future plans to combine with Canyons Resort (currently managed by Vail). One month later, Deer Valley in Summit County announced that it had bought Solitude Ski Resort in Salt Lake County, and newly-constructed ski resort, Cherry Peak, planned to open in Cache County in late 2014, bringing Utah's ski resort count to 15. Utah ski industry leaders are optimistic regarding the effects these changes will have on Utah's ski industry economy.

In addition, the Salt Lake City International Airport began the first phase of construction on its $1.8 billion redevelopment plan, which is expected to create 24,000 Utah jobs with $1 billion in income. Meanwhile, the Ogden-Hinckley Airport announced recently it will be offering twice-daily roundtrip flights to Utah's national parks. In other parts of the state, the city of Provo, Utah, was voted the second "Best City in the Nation" in a 2014 *Outside* magazine online poll, Moab, Utah opened two new hotels (Hampton Inn and Marriott) along with over 100 new condo units, and rural counties like Daggett, Uintah, and San Juan began constructing new trail systems to promote recreational opportunities and showcase their area's natural and cultural assets.

2015 Outlook

The Utah travel and tourism outlook for 2015 remains optimistic. The U.S. Travel Association predicts total national travel expenditures to increase around 5 percent, domestic leisure person-trips to increase 2 percent, and total

Figure 21.2
Utah National Park and Skier Visits



Sources: U.S. National Park Service and Ski Utah

Figure 21.3
Utah Tourism Indicators

Year	Hotel Room Rents (millions)	National Park Visits	State Park Visits	Salt Lake Int'l. Airport Passengers	Skier Visits	Hotel Occupancy Rate	Travel-Related Employment	Travel-Related Wages (millions)	Traveler Spending (millions)	Travel-Related Tax Revenue (millions)
1983	$140,728,877	2,465,294	5,214,498	7,059,964	2,038,544	-	-	-	-	-
1984	161,217,797	2,616,301	4,400,103	7,514,113	2,317,255	-	-	-	-	-
1985	165,280,248	2,804,693	4,846,637	8,984,780	2,369,901	-	-	-	-	-
1986	175,807,344	3,224,694	5,387,791	9,990,986	2,436,544	-	-	-	-	-
1987	196,960,612	3,566,069	5,489,539	10,163,883	2,491,191	-	-	-	-	-
1988	220,687,694	3,941,791	5,072,123	10,408,233	2,440,668	-	-	-	-	-
1989	240,959,095	4,135,399	4,917,615	11,898,847	2,368,985	-	-	-	-	-
1990	261,017,079	4,425,086	5,033,776	11,982,276	2,572,154	63.8%	-	-	-	-
1991	295,490,324	4,829,317	5,425,129	12,477,926	2,500,134	69.4%	-	-	-	-
1992	312,895,967	5,280,166	5,908,000	13,870,609	2,751,551	70.3%	-	-	-	-
1993	352,445,691	5,319,760	6,950,063	15,894,404	2,560,805	71.9%	-	-	-	-
1994	378,024,547	5,111,428	6,953,400	17,564,149	2,850,000	73.7%	-	-	-	-
1995	429,189,045	5,381,717	7,070,702	18,460,000	2,800,000	73.5%	-	-	-	-
1996	477,409,577	5,749,156	7,478,764	21,088,482	3,113,800	73.1%	-	-	-	-
1997	519,160,181	5,537,260	7,184,639	21,068,314	2,954,690	68.0%	-	-	-	-
1998	540,424,182	5,466,090	6,943,780	20,297,371	3,042,767	63.8%	-	-	-	-
1999	545,328,875	5,527,478	6,768,016	19,944,556	3,095,347	61.6%	-	-	-	-
2000	567,708,954	5,332,266	6,555,299	19,900,770	3,278,291	57.1%	-	-	-	-
2001	578,445,705	4,946,487	6,075,456	18,367,961	2,984,574	56.0%	-	-	-	-
2002	666,718,674	5,147,950	5,755,782	18,662,030	3,141,212	57.3%	-	-	-	-
2003	599,476,406	5,042,756	4,570,393	18,466,756	3,429,141	54.2%	-	-	-	-
2004	660,606,509	5,318,157	4,413,702	18,352,495	3,895,578	56.6%	127,739	-	$5,648	$758
2005	753,689,699	5,329,931	4,377,041	22,237,936	4,062,188	60.7%	126,151	-	5,779	772
2006	739,621,493	5,165,498	4,494,990	21,557,646	4,082,094	63.4%	124,482	-	5,908	785
2007	819,803,181	5,445,591	4,925,277	22,044,533	4,258,900	63.7%	138,848	-	6,769	905
2008	1,002,664,837	5,670,851	4,564,770	20,790,400	3,972,984	59.4%	136,893	-	6,925	908
2009	909,333,228	6,002,104	4,820,930	20,432,218	4,048,153	53.1%	125,380	$3,151	5,689	771
2010	1,015,280,514	6,072,900	4,842,891	21,016,686	4,223,064	56.1%	124,952	3,263	6,317	867
2011	1,160,845,531	6,304,838	4,803,876	20,389,474	3,802,536	57.8%	126,821	3,413	6,955	942
2012	1,248,313,080	6,554,057	5,093,740	20,096,549	4,031,621	59.0%	129,592	3,523	7,318	989
2013	1,322,791,104	6,328,040	4,063,382	20,186,474	4,063,382	59.1%	132,681	3,722	7,507	1,017
Percent Change										
2012-2013	6.0%	-3.4%	-20.2%	0.4%	0.8%	0.2%	2.4%	5.6%	2.6%	2.8%
Average Annual Rate of Change										
1983-2013	7.8%	3.2%	-0.8%	3.6%	2.3%	-0.3%	0.4%	4.3%	3.1%	3.1%

Notes: In 2013, Utah State Parks employed a new methodology to calculate recreational visitation.
Hotel occupancy rates provided by Rocky Mountain Lodging (1990-1999) and Smith Travel Research (2000-present).
Employment estimates provided by GOMB (2004-2008) and BEBR (2009-present).
Wage estimates provided by BEBR (2009-present).
Spending estimates provided by D.K. Shifflet (2004-2008) and TNS Global (2009-present).
Tax revenue estimates provided by GOMB (2004-2008) and BEBR (2009-present).

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; Rocky Mountain Lodging Report; Smith Travel Research; Department of Community and Economic Development; Governor's Economic Development; Bureau of Economic and Business Research - University of Utah; Governor's Office of Management and Budget; Governor's Office of Economic Development - Office of Tourism; D.K Shifflet and Associates Ltd; and TNS Global

international visitation to increase 4 percent in 2015. Continued growth is expected in the Chinese travel market not only in Utah, but also across the nation, due to more relaxed Chinese travel visa regulations. It is also anticipated that the Utah Office of Tourism's continued efforts to market Utah via their "Mighty 5" and "Find Your Greatest" campaigns, which include digital advertising and the placement of TV, outdoor, and print ads in several large U.S. cities, will continue to have a positive impact on incremental nonresident travel to both urban and rural Utah in 2015.

Nonprofit Sector

Nonprofits play a significant role in the social and economic fabric of Utah and the United States. Charitable nonprofits earn their tax exempt status every day by giving back to the community, dedicating themselves to the public good, and working in collaboration with business and government to solve our communities' most intractable problems.

There were 8,281 registered tax-exempt nonprofit organizations in the state of Utah in 2014. 4,313 of these organizations were active registered 501(c)3 public charities whose work addresses needs within our communities and throughout the world.[1] Charitable organizations accounted for over 9 percent of Utah's Gross Domestic Product and employed more than 5.5 percent of Utah's workforce.[2] The nonprofit sector is expected to continue to grow at an increasing rate, despite expenses that exceed revenues as organizations financially recover from the Great Recession.

Through 2015, public charities will continue to see a steady or increased demand for services from the public and will continue to work towards creating financially stable and sustainable organizations by diversifying their funding streams, improving outcome measurement and reporting and expanding their marketing and outreach efforts to further engage with local communities.

2014 Summary

When speaking about the nonprofit sector as a whole, this includes all organizations that qualify for an exemption from paying federal income tax under 34 categories established in the U.S. Code of Federal Regulations, Title 26, section 501. There were over 1.4 million tax exempt organizations registered in the United States as of September 2014. The largest category of exempt organizations is the 501(c)3 category, which includes 1.09 million public charities that serve religious, educational, scientific, and public purposes. While this IRS category includes public charities and foundations, this chapter will focus specifically on 501(c)3 public charities, because they make up the largest portion of the nonprofit sector in Utah. However, it is important to note that religious institutions and state funded universities are either not included or under-represented in this group due to their tax filing status, despite their sizable charitable contributions and impact within the state. For example, universities in Utah are most often categorized within the government sector and religions are not required to file an IRS 990 form unless they request government grants. Both of these entities have substantial impact on Utah's economy and community.

In 2013, 371,000 reporting public charities in the U.S. spent $1.56 trillion and held $2.99 trillion in assets. From 2000-2010, nonprofit revenues and assets increased 42 percent, after adjusting for inflation, while the U.S. gross domestic product grew only 16 percent after adjusting for inflation. The number of reporting public charities grew from 249,859 in 2000 to 366,086 in 2010 representing a 47 percent increase over ten years, an average growth rate of 4.6 percent per year. However, most growth in the sector occurred from 2000-2005 and from 2010 to 2012 the number of public charities grew to 371,320, so the sector grew at a rate of only 0.7 percent per year. Thus, while the number of reporting public charities continues to grow, the rate of growth in the sector has slowed considerably. This may be due to the fact that while public charities revenues and assets increased at approximately 42 percent, their expenses increased at 53 percent after adjusting for inflation.

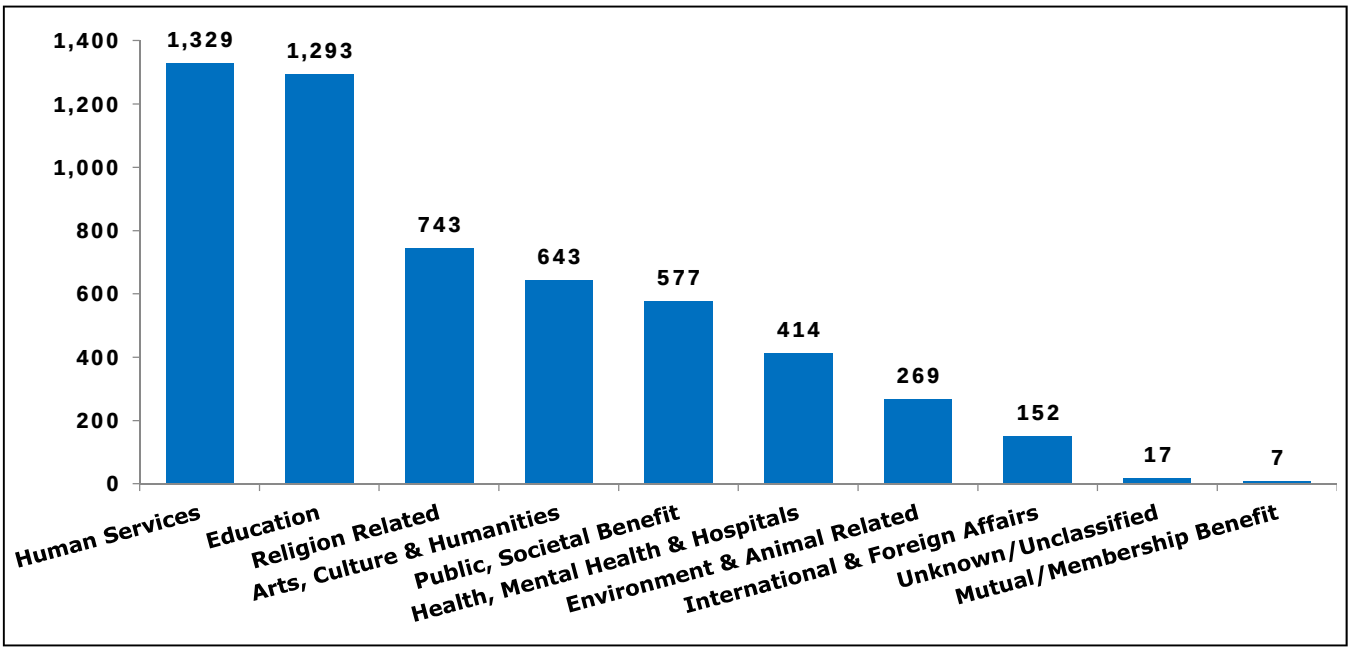
According to IRS records there are 8,281 nonprofit organizations filing as tax exempt in the state of Utah as of October 2014. Between 2003 and 2013 the number of registered public charities in Utah increased by 16.9 percent, an average growth rate of 1.7 percent annually. However, from October 2013 to September 2014, the total number of public charities registered in Utah increased by 4.1 percent, while the number of reporting public charities grew by 2.8 percent indicating a steady and increasing rate of growth in Utah throughout 2014.

Public charities are classified into nine subsectors and the number of organizations in each subsector in Utah closely resembles the demographics of the sector across the nation, with Human Service organizations accounting for the largest majority, or one third of the field, while education organizations account for about 16 percent and health organizations for 12 percent. The three largest charitable organizations in the state are Intermountain Healthcare, Edward Hospital, and the Center for Excellence in Higher Education, a group of colleges that includes Stevens-Henager College. These three public charities reported more than $9.3 billion in gross revenues for 2013. The total gross revenues reported by all 501(c)3 organizations in Utah was more than $12 billion in 2013, which represents 9.1 percent of Utah's 2013 Gross Domestic Product.

Nationally, nonprofit organizations contributed 5.5 percent of the country's gross domestic product in 2012. While there are many nonprofits in Utah, only a handful have a significant impact on the economy. Most public charities in the United States and more than three quarters in Utah report annual revenues of less than $500,000. Less than 9 percent of Utah charities reported total revenues of over $1 million annually, yet these public charities bring in 96 percent of revenues

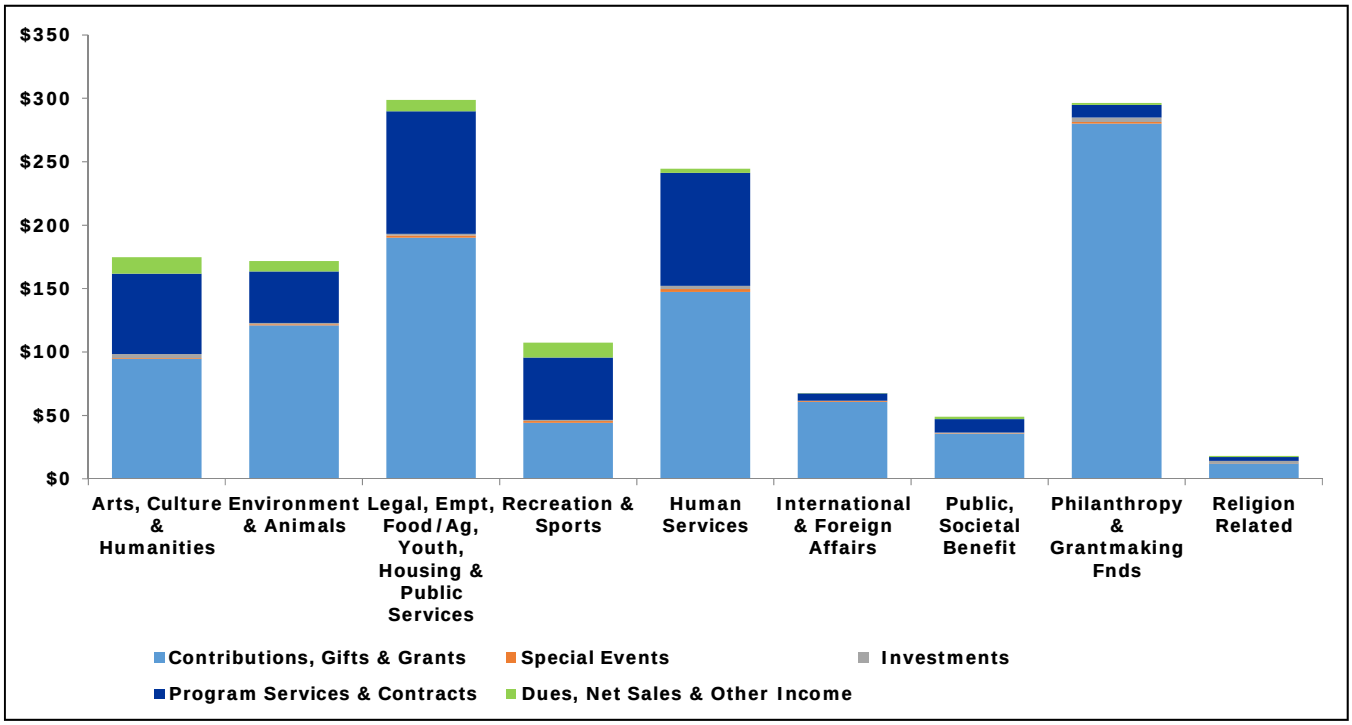
1. Internal Revenue Service, Exempt Organizations Business Master File (2014, Oct) The Urban Institute, National Center for Charitable Statistics, http://nccsdataweb.urban.org/
2. Independent Sector. The Nonprofit Sector in Utah. https://independentsector.org/uploads/Policy_PDFs/stateprofiles/utah.pdf

Figure 22.1
Registered 501(c)3 Organizations by Major Purpose/Activity: September 2014



Sources: Internal Revenue Service, Exempt Organizations Business Master File (2014, Sep); The Urban Institute, National Center for Charitable Statistics

Figure 22.2
Revenue Sources of Utah 501(c)3 Organizations Filing Form 990



Sources: NCCS Core File (Public Charities, circa 2012) The Urban Institute, National Center for Charitable Statistics, http://nccsdataweb.urban.org/

Figure 22.3
Revenue Sources of Reporting 501(c)3 Public Charities: 2012

Organizations by Major Purpose or Activity	Number of Organizations	Contributions, Gifts & Grants	Special Events	Investments	Program Services & Contracts	Dues, Net Sales & Other Income	Total Revenue
Health Care/Hospitals	108	$154,619,023	$277,901	$73,260,357	$5,089,604,421	$105,433,360	$5,423,195,062
Education	318	$343,812,948	$2,237,107	$6,491,779	$382,440,348	$17,070,044	$752,052,226
Legal, Employment, Food/Agriculture, Youth Development, Housing & Public Safety Services	257	$190,149,165	$1,675,575	$1,380,154	$96,659,272	$8,833,673	$298,697,839
Philanthropy, Voluntarism & Grantmaking Foundations	120	$280,029,440	$1,399,971	$3,556,475	$9,893,695	$1,500,504	$296,380,085
Human Services	221	$147,494,324	$2,097,555	$2,539,544	$89,149,119	$3,226,544	$244,507,086
Mental Health, Voluntary Health Associations & Medical Research	135	$97,326,511	$3,172,147	$2,957,066	$721,763,852	$12,477,470	$207,697,046
Arts, Culture & Humanities	271	$94,533,564	$736,877	$3,142,442	$63,317,767	$13,081,200	$174,811,850
Environment & Animal Related	130	$120,952,437	$897,552	$1,143,236	$40,463,162	$8,374,409	$171,830,796
Recreation & Sports	187	$44,291,434	$1,355,205	$830,411	$49,264,368	$11,572,858	$107,314,276
International & Foreign Affairs	76	$60,849,155	$652,150	$60,692	$5,872,566	$135,647	$67,570,210
Public, Societal Benefit	119	$35,622,244	$450,598	$309,621	$10,709,312	$1,890,545	$48,982,320
Religion Related	70	$12,193,726	$71,970	$1,860,306	$3,045,397	$991,540	$18,162,939
Other/Unknown	3	$112,542	$0	$662	$69,894	$0	$183,098
Totals	**2,015**	**$1,581,986,513**	**$15,024,608**	**$97,532,745**	**$6,562,253,173**	**$184,587,794**	**$7,811,384,833**

Notes:
1. Organizations are grouped by their NTEE Codes and include data from registered, active tax-exempt organizations with over $50,000in gross receipts who filed IRS forms 990, 990-EZ or 990-PF
2. Contributions, Gifts & Grants include direct and indirect public support and money received from government grants reported on Part I, line 1d, Form 990.
3. Special events includes the net income or loss from special events the organizations hosted, reported in Part 1, Line 9 of Form 990.
4. Investments includes dividends and interest on savings, temporary cash investments securities etc. reported on Part 1, Form 990.
5. Program Services & Contracts includes revenue generated from fee for service programs and government fees and contracts, reported on Part VII, line 93, Form 990.
6. Dues, Net Sales & Other Income accounts for membership dues and assessments, sales of other assets and income from Part 1, Form 990.
7. Total Revenue includes all revenue reported on Part I, line 12 of Form 990.

Source: NCCS Core File (Public Charities, circa 2012); The Urban Institute, National Center for Charitable Statistics, http://nccsdataweb.urban.org/

Figure 22.4
Number of Nonprofit Organizations in Utah: 2003-2013

	2003		2013		2003-2013
	Number of Orgs.	Percent of All Orgs.	Number of Orgs.	Percent of All Orgs.	Percent Change
All Nonprofit Organizations	**7,718**	**100.0%**	**7,993**	**100.0%**	**3.6%**
501(c)(3) Public Charities	4,559	59.1%	5,331	66.7%	16.9%
501(c)(3) Private Foundations	793	10.3%	803	10.0%	1.3%
Other 501(c) Nonprofit Organizations	2,366	30.7%	1,859	23.3%	-21.4%
Small community groups and partnerships, etc.	Unknown	NA	Unknown	NA	NA
501(c)(3) Public Charities	4,559	59.1%	5,331	66.7%	16.9%
501(c)(3) Public Charities Registered with the IRS (including registered congregations)	4,559	59.1%	5,331	66.7%	16.9%
Reporting Public Charities	1,588	20.6%	4,209	52.7%	165.1%
Operating Public Charities	1,310	17.0%	3,776	47.2%	188.2%
Supporting Public Charities	278	3.6%	433	5.4%	55.8%
Non-Reporting, or with less than $25,000 in	2,971	38.5%	1,122	14.0%	-62.2%
*Congregations (about half are registered with IRS)**	-	0.0%	0	0.0%	NA
501(c)(3) Private Foundations	793	10.3%	803	10.0%	1.3%
Private Grantmaking (Non-Operating) Foundations	732	9.5%	721	9.0%	-1.5%
Private Operating Foundations	61	0.8%	82	1.0%	34.4%
Other 501(c) Nonprofit Organizations	2,366	30.7%	1,859	23.3%	-21.4%
Civic leagues, social welfare orgs, etc.	493	6.4%	296	3.7%	-40.0%
Fraternal beneficiary societies	278	3.6%	263	3.3%	-5.4%
Business leagues, chambers of commerce, etc.	532	6.9%	511	6.4%	-3.9%
Labor, agricultural, horticultural orgs	265	3.4%	199	2.5%	-24.9%
Social and recreational clubs	174	2.3%	134	1.7%	-23.0%
Post or organization of war veterans	218	2.8%	145	1.8%	-33.5%
All Other Nonprofit Organizations	406	5.3%	311	3.9%	-23.4%

Note: The number of congregations is from the website of American Church Lists (http://list.infousa.com/acl.htm), 2004. These numbers are excluded from the totals for the state since approximately half of the congregations are included under registered public charities.

Source: IRS Business Master File 10/2013 (with modifications by the National Center for Charitable Statistics at the Urban Institute to exclude foreign and governmental organizations)

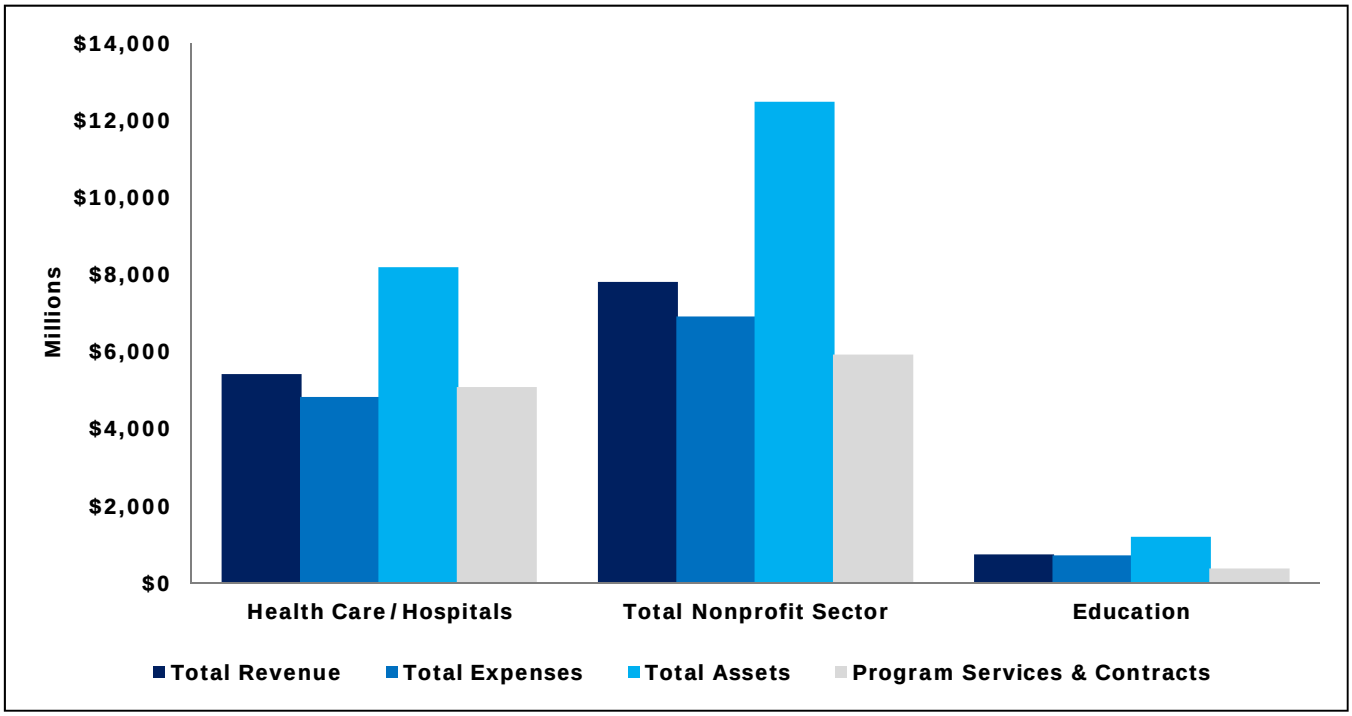
earned by the sector in the state. The economic impact of Utah's public charities is driven by these large organizations which are primarily hospitals and higher education organizations.

In 2010, the nonprofit sector paid $587.7 billion or 9.2 percent of all wages in the United States.[3] Of paid nonprofit employees, 54 percent worked in the health or social assistance sectors. Nonprofit wages increased 29 percent over the decade from 2000-2010 and employment in the sector grew by 17 percent, with growth continuing throughout the recession. In terms of growth rate, wages and employment numbers, the nonprofit sector grew faster than both the business and government sectors. According to the Utah Compensation Report, nonprofit organizations reported an 8.7 percent average increase in their salary budgets from 2013 to 2014, thus it can be assumed wages are growing within the state's sector as well.[4] Currently, it is difficult to extrapolate wage and employment data representative of the nonprofit sector in Utah and the United States because there is no single source that collects or requires reporting of this type of data. The Utah Department of Workforce services compiles data solely based on NAICS sector codes which does not have any direct correlation to the National Taxonomies of Exempt Entities. All information currently collected about the nonprofit sector comes primarily from IRS reports or from close examination of labor statistics and unemployment reports. This missing data makes it difficult to describe the complete impact of the nonprofit sector on Utah's economy and workforce.

Significant Issues: Government Contracting and Grants
In 2012, 255 public charities in Utah received $265 million in funding from government contracts and grants. The largest portion of this funding, 46 percent or $121.9 million, was awarded to human services organizations and arts, culture and humanities organizations accounted for another 23 percent or $60.9 million. The Great Recession and the federal

3. Roeger, K., Blackwook, A. S. and Pettijohn, S. L. (2012). The Nonprofit Almanac 2012, Urban Institute.
4. Columbia Books and Association. (2014). TRENDS - The Compensation Report: An Analysis of Utah Nonprofits 2014

Figure 22.5
Health and Education Charities Compared to the Whole Public Charity Sector



Note: Total Revenue includes all revenue reported on Part I, line 12 of Form 990. Total Expenses is the total reported from Part I, line 17 on Form 990. Total Assets includes cash, savings, property etc. reported from Part IV of Form 990. Program Services and Contracts includes revenue generated from fee for service programs and government fees and contracts.

Source: NCCS Core File (Public Charities, circa 2012). The Urban Institute, National Center for Charitable Statistics, http://nccsdataweb.urban.org/

sequester caused public charities to experience a decline in revenue from multiple sources including government agencies at all levels, private and corporate donors.

Of Utah nonprofits receiving federal funding, 44 percent reported a decline in revenue from federal agencies in 2012. Over one third of agencies with government contracts also experienced a decline in revenue from local and state government agencies. Revenue from corporate donations and private foundations also decreased. As a result, 48 percent of these organizations froze or reduced employee salaries while many also reduced their number of employees, drew on financial reserves, borrowed funds or increased their lines of credit in order to cope with cuts in federal spending.[5] Over one third of Utah organizations reported operating at a deficit for 2012 regardless of their overall budget size. Reduction of funding means that nonprofits are expected to do more with less. Government contracts and grants rarely cover the full costs of services provided and 54 percent of nonprofits nationwide see this as a problem facing the sector. This is due to unrealistic reimbursement rates, and arbitrary limits on indirect costs that are not reasonable because they were written without assessing the actual costs of providing these services. This has weakened public charities structurally and financially and as a result negatively impacted their programs and the communities that they serve.[6]

Outcome and Impact Measurement for Reporting

Donor trust is of paramount importance for a nonprofit organizations long term ability to deliver services in the community. A stellar reputation and accountability are key components that must be in place for this trust to exist. To ensure that nonprofits are accountable to their donors, grantors and service users, many organizations measure outcomes and quantitative impacts of their programming. However, as evidence based programming and best practice knowledge has grown, so has the burden of increased reporting and measuring outcomes for nonprofit organizations. For organizations with government contracts, this has resulted in complicated and duplicitous reporting

5. Pettijohn, Sarah L., Boris, Elizabeth T., De Vita, Carol J. and Saunji D. Fyffe. (2013). Overview of Nonprofit Contractors and Grantees Survey. Urban Institute.
6. National Council of Nonprofits. (2014). Toward Common Sense Contracting: What Taxpayers Deserve, http://www.councilofnonprofits.org/files/downloads/toward-common-sense-contracting-what-taxpayers-deserve.pdf

requirements. Over 70 percent of nonprofit organizations in Utah reported that this was a problem for their organizations.

The cost of assessments and reporting are rarely covered by earmarked donations, grants or contracts, even though reports are required by the funder. Many measures required by funders generate extraneous data and nonprofits rarely have the necessary technology to efficiently manage and analyze data collected. The costs of compliance and consistency require that nonprofits spend more time and money raising funds to collect data which may not even be used to evaluate and actually reform programming.

Moving forward, nonprofit organizations, governments and other stake holders must consider the usefulness of extensive reporting requirements and determine what is truly useful and necessary and reduce the amount of redundant and unnecessary reporting measures that place undue burdens on nonprofit organizations so they can continue the work that is core to their missions within their communities.

2015 Outlook

Despite the Great Recession, the nonprofit sector and particularly the size and scope of public charities in Utah continued to grow. The number of public charities as a percentage of all nonprofit organizations grew by 16.9 percent from 2003 to 2013, with 501(c)3 organizations now compromising 66.7 percent of the sector, up 7.6 percent from 2003. Between 2003 and 2013, the number of reporting public charities (those with over $25,000 in gross receipts) has increased 165.1 percent in ten years, an annual average growth rate of 16.5 percent annually. Slow, yet continual growth can be expected to occur in the nonprofit sector, particularly in the number and revenue of private charities. These 501(c)3 organizations will continue to focus on improving the sustainability of their organizations by growing and diversifying their revenue streams to keep up with expenses.

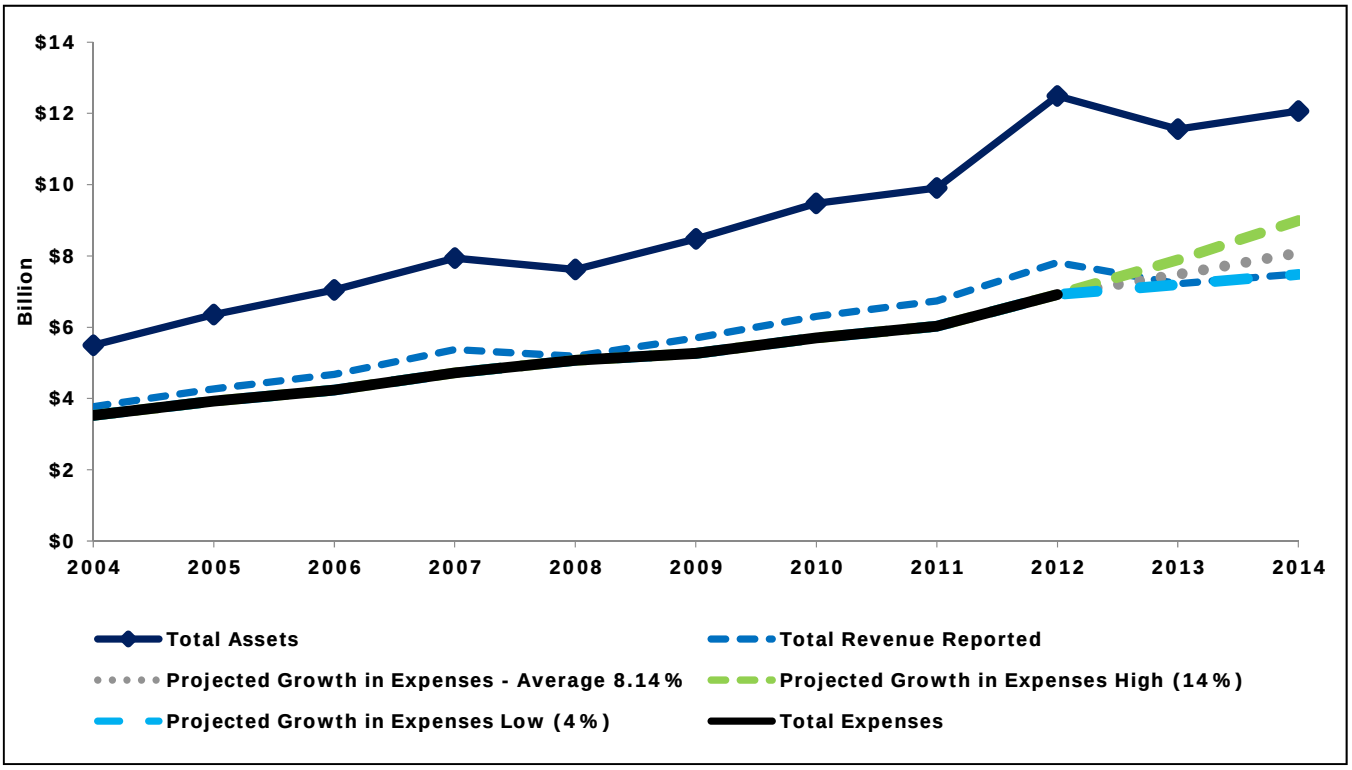
In the Nonprofit Finance Fund's 2014 Survey on the state of the nonprofit sector 42 percent of Utah respondents reported that "achieving long-term financial sustainability" is their greatest challenge, followed by "marketing, outreach and community engagement" (25 percent) and "diversifying funding sources" (22 percent). Nonprofits will continue to see growth in their revenue from fees charged for services and may also finally expect to see growth in revenue from their assets as the stock market and housing marking continues to rebound. In Utah, 76 percent of nonprofits reported an increase in the demand for services from 2012 to 2013 and most organizations anticipate that the demand for services will remain steady through the remainder of 2014 and 2015.[7] As the economy continues to pick up steam, wages and employment numbers will continue to increase in the sector to meet community demands.

Conclusion

The nonprofit sector contributes goods and services to Utah's economy and adds implicit value to the state by providing services to vulnerable populations and strengthening our communities. Nonprofit organizations provide employment to many of Utah's citizens and the sector has continued to experience growth throughout the economic recession. Nonprofit organizations and particularly public charities will need to develop diverse, consistent revenue streams to continue this rate of growth without hollowing out their organizations. Currently the rate of growth is unsustainable unless donors and contractors in both the public and private sector develop long term relationships with organizations and begin to cover the full cost of programming, specifically related to outcome measurement and reporting. With Utah leading the nation in volunteerism and a strong local culture of charitable giving, the nonprofit sector can expect continued growth as it strives to meet the diverse needs of Utah's citizens and communities.

7. Nonprofit Finance Fund State of the Sector Survey 2014, http://nonprofitfinancefund.org/state-of-the-sector-surveys

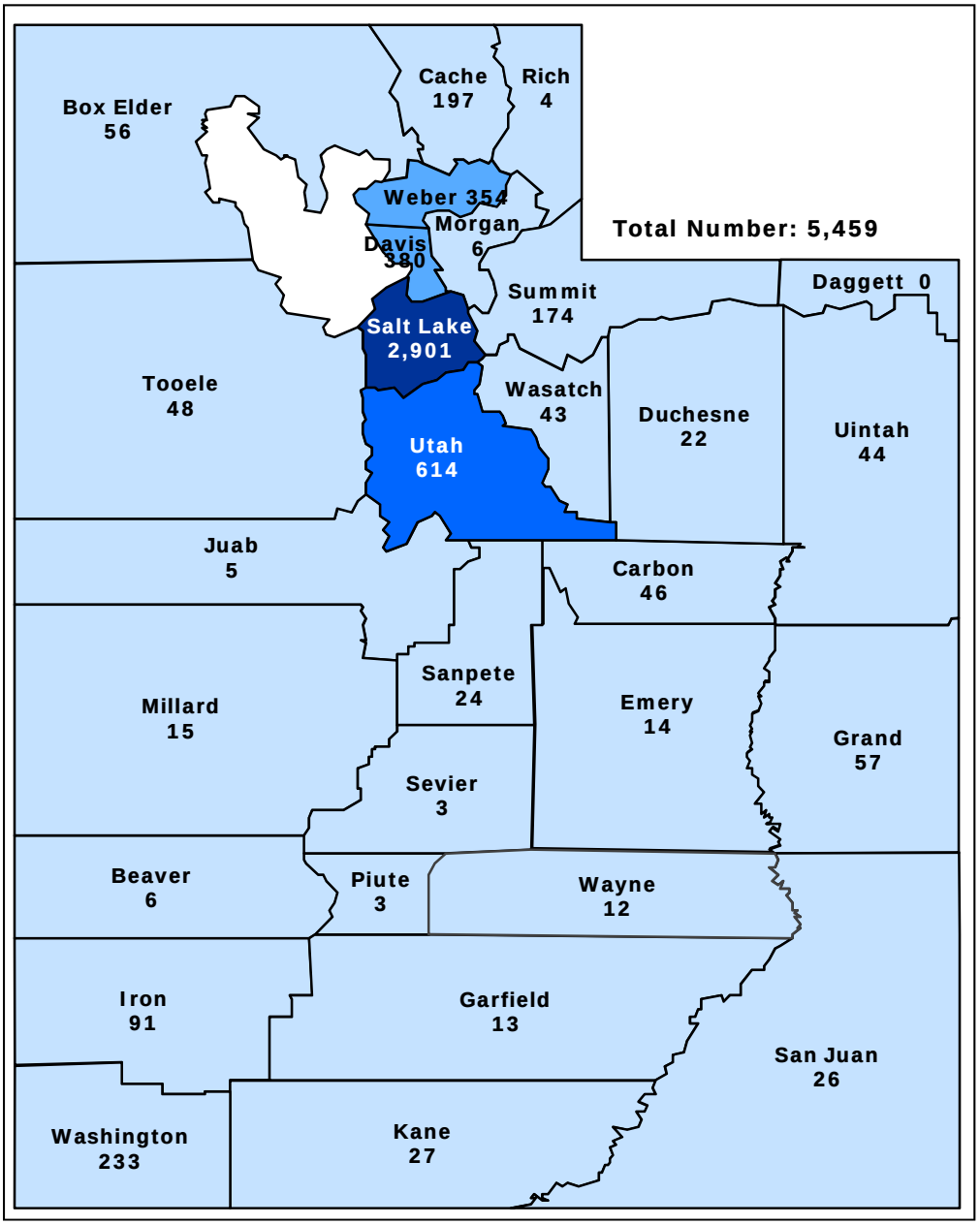
Figure 22.6
Growth of Revenue and Assets of 501(c)3 Public Charities in Utah: September 2014



Note: Total Assets reported is the total on IRS Form 990, line 59 or Form 990-EZ, line 25. This includes the total value of real estate, accounts, pledges and grants receivable, inventories and other assets at the end of the organization's fiscal year. Total Revenue reported includes the total from Line 12 of Form 990, which includes all income from contributions, gifts and grants, special events, investments, program services and contracts, membership dues, sales and fees for service.

Source: NCCS Core File (Public Charities, circa 2004-2012), Internal Revenue Service, Exempt Organizations Business Master File (501(c)(3) Public Charities, 2014, Sep and 2013, Dec), http://nccsdataweb.urban.org/

Figure 22.7
Number and Distribution of Utah Public Charities by County



Sources: Internal Revenue Service, Exempt Organizations Business Master File (501(c)(3); The Urban Institute, National Center for Charitable Statistics

Intergenerational Poverty in Utah

Although Utah has emerged from the Great Recession and is experiencing tremendous economic growth, 10.1 percent of Utahns were living in poverty from 2011-2013. Fortunately, Utah's poverty rate is significantly lower than the national average. However, there are high societal and economic costs of allowing generations of families to remain in poverty. This jeopardizes not only their future but the state's future in lost human capital, should it fail to implement programs and policies designed to end the cycle of poverty for Utah children.

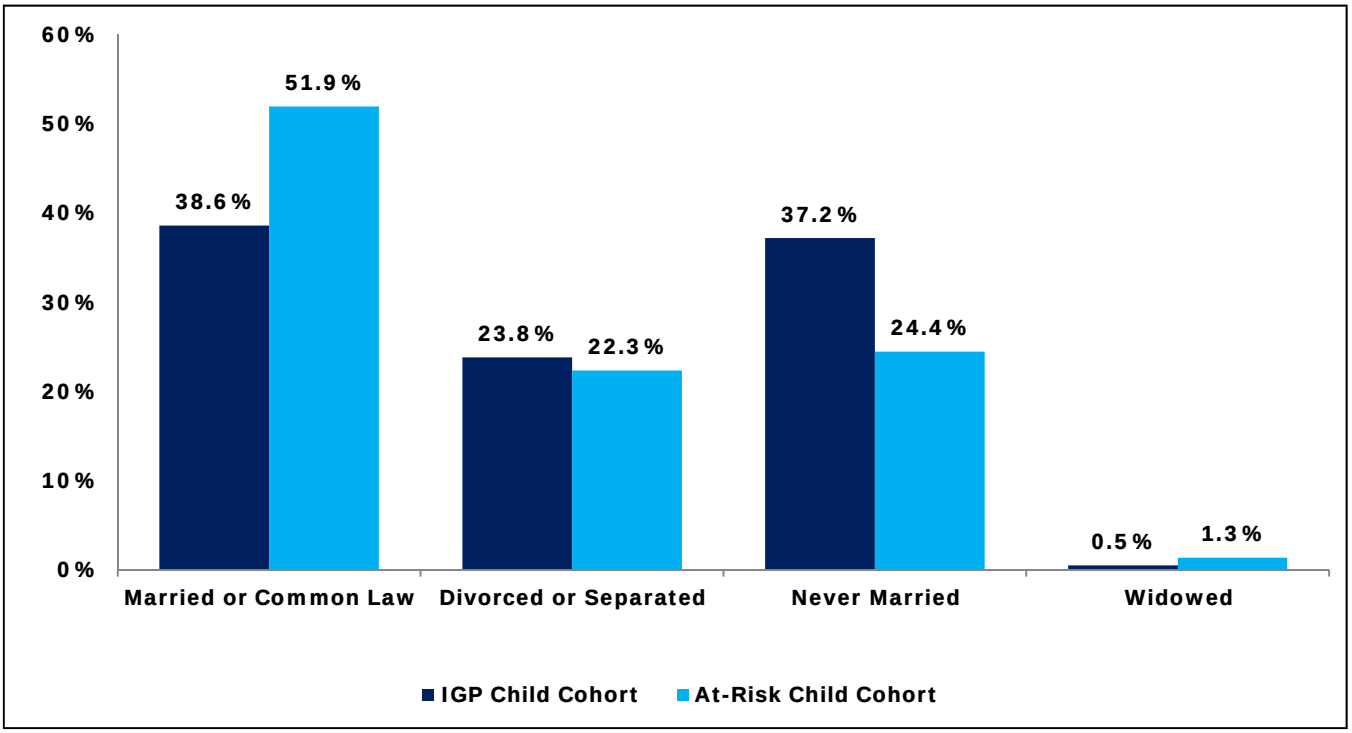
Children growing up in poverty experience challenges to healthy development both in the short and long term, demonstrating impairments in cognitive, behavioral, and social development. This often leads to poor outcomes such as failing to graduate from high school, teen pregnancy, poor health, and difficulty obtaining secure employment. The younger a child is when his or her family is impoverished, the greater the likelihood of poor outcomes for that child. In response to this concern, the Utah Legislature passed the Intergenerational Poverty Mitigation Act in 2012 and subsequently expanded it in 2013. Under the act, the Utah Department of Workforce Services created a tracking system to gain greater understanding of the populations of impoverished children most at risk of remaining in poverty as adults. The database is revealing troubling data impacting Utah's economy.

Currently, 35,816 adults are identified as part of the intergenerational poverty adult cohort. This equals 24 percent of the adults between the ages of 21 and 43 years old receiving public assistance. These adults are parents to 52,073 children. In addition to these children already in the cycle of poverty, there are 236,056 children in jeopardy of remaining in poverty as adults. Combined, the two groups of children comprise 33 percent of Utah's population between the ages of zero and 17 years old.

The 2014 data reveals significant barriers and challenges for the adults and children experiencing intergenerational poverty. These barriers directly impact Utah's current and future economy. Since 2014 represents the first year gathering data regarding these barriers, the data establishes a baseline for future years.

Although not all of the barriers impacting Utah families experiencing intergenerational poverty relate to the economy, several do have an economic impact. The factors impacting the economy include family structure, parental educational attainment, attachments to the labor force, income, and high school graduation rates among intergenerational poverty families.

Figure 23.1
Children in Households by Marital Status of Adults



Source: Utah Department of Workforce Services IGP = Intergenerational Poverty

Marital Status
Poverty among children living in single-parent families is significantly higher than in two-parent households. In Utah, 35 percent of single-parent families are living in poverty. In contrast, only 8 percent of married couple families are living in poverty.

Among children living in intergenerational poverty, nearly 62 percent are living in single-parent households; nearly 50 percent of children in the at-risk child cohort are living in single-parent households.

Parental Educational Attainment
The level of education a parent achieves has significant bearing on family economic security. A parent's level of educational attainment impacts attachment to the labor force, wages, and lifetime earnings. It is not surprising that educational attainment levels are low among Utah families living in poverty. Among Utah adults living in poverty, 50 percent lack an education beyond high school. Similarly, among adults experiencing intergenerational poverty, 75 percent lack an education beyond high school. Among the Utah population, only 30 percent lack an education beyond high and 27 percent have a bachelor's degree or higher.

Employment and Income
Given the levels of educational attainment among the intergenerational poverty adult cohort, it is not surprising that these adults struggle with attachment to the labor force and obtaining wages that meet the basic needs of a family. There is a perception that those living in poverty do not work. This perception is refuted by statewide data and data of those living in intergenerational poverty. In fact, the majority of Utah families living in poverty have at least one spouse working full-time or part-time. In 2013, the majority of adults in the IGP adult cohort had some employment, although only 29 percent worked the entire year.

Among those adults who are employed, the median wages are substantially lower than Utah's average median wage. Statewide, the annual median wage is nearly four times that of the $10,701 earned annually by the average adult experiencing intergenerational poverty. The data related to the intergenerational poverty adults provides some explanation for the low wages: low educational attainment, sporadic attachment to the labor force, and employment in low-wage job sectors.

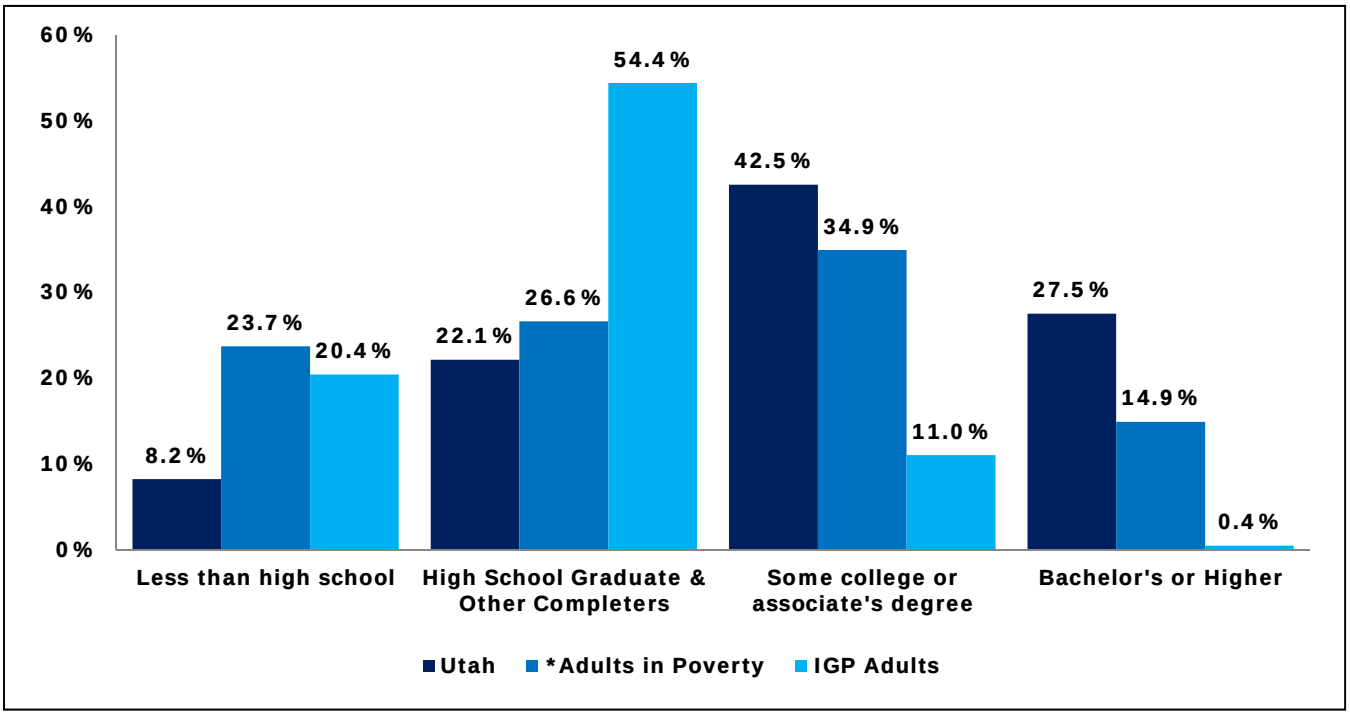
Educational Outcomes Among Intergenerational Poverty Children
Unfortunately, the academic outcomes for the children experiencing intergenerational poverty are troubling. These children are experiencing extremely low rates of third grade language arts proficiency, eighth grade math proficiency, and only 50 percent are graduating from high school.

2015 Outlook
In 2015, the Intergenerational Welfare Reform Commission will be establishing five and ten-year plans, including measurable goals and benchmarks. These plans will guide the establishment of policies and programs designed to reduce the number of children living in poverty as they become adults. Additionally, legislative proposals that may be adopted during the 2015 Legislative Session may impact the data related to intergenerational poverty, although most impacts will not emerge in 2015. Such proposals may include: providing access to high-quality preschool for children in intergenerational poverty; expansion of full-day kindergarten programs; home visitation programs for young families; and adoption of the Governor's "Healthy Utah" program.

Conclusion
Despite economic growth in Utah, thousands of Utah families are living in intergenerational poverty. Poverty is economic issue impacting communities throughout Utah and imposing lasting impacts on children. The data related to families caught in the cycle of poverty and welfare dependence demonstrate that there are significant barriers beyond income that jeopardize their ability to emerge from the cycle.

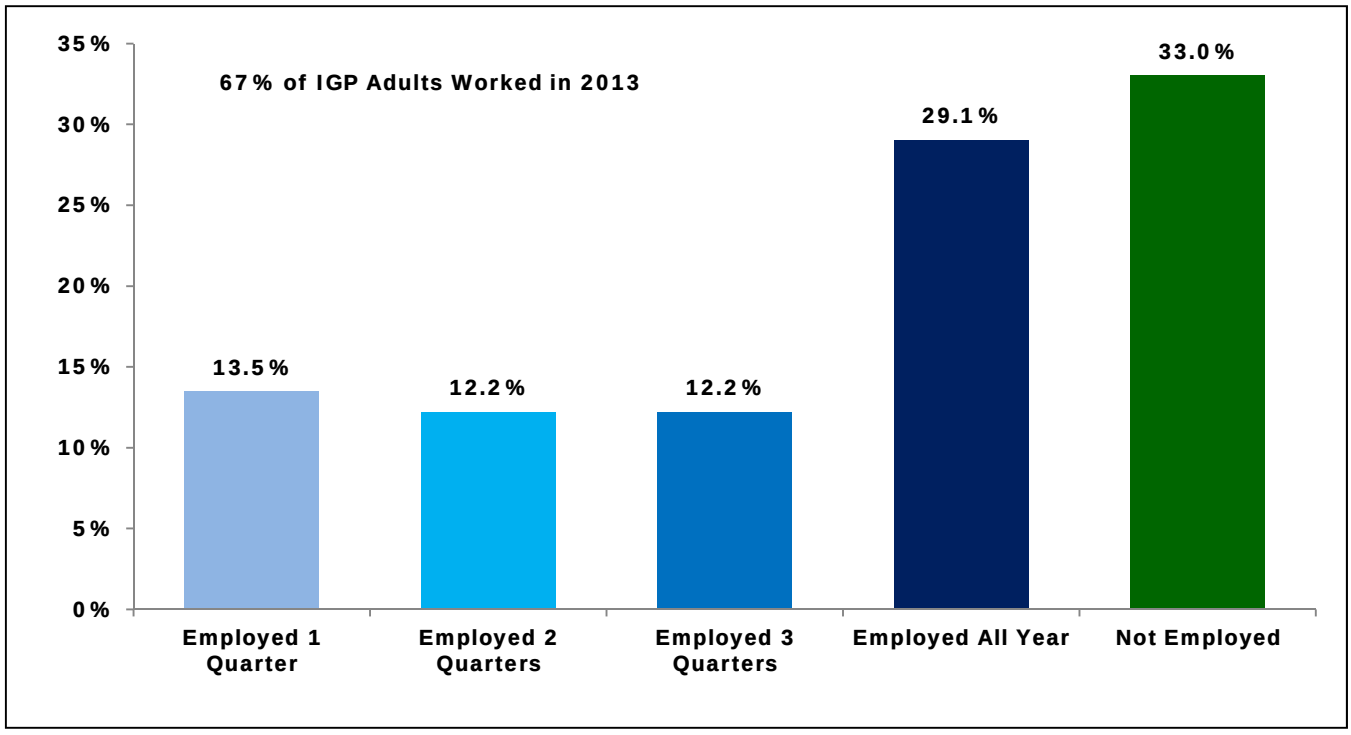
Although still in the early stages of understanding the factors causing families to remain in poverty for multiple generations, the data provided by the Department of Workforce Services is revealing factors that directly impact a family's ability to become self-sufficient and therefore impacts Utah's economic outlook.

Figure 23.2
Lower Educational Attainment for Intergenerational Poverty Adults



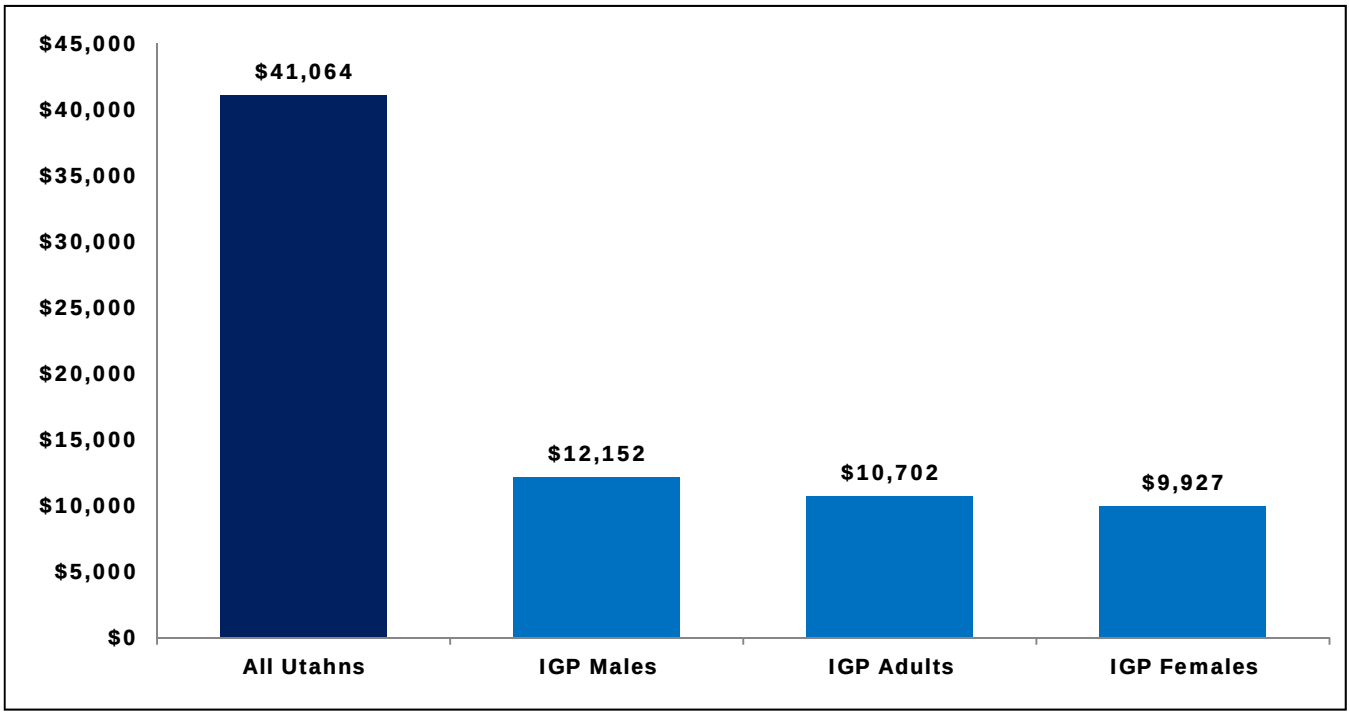
Source: Utah Department of Workforce Services IGP = Intergenerational Poverty

Figure 23.3
Adults in Intergenerational Poverty Adult Cohort: 2013



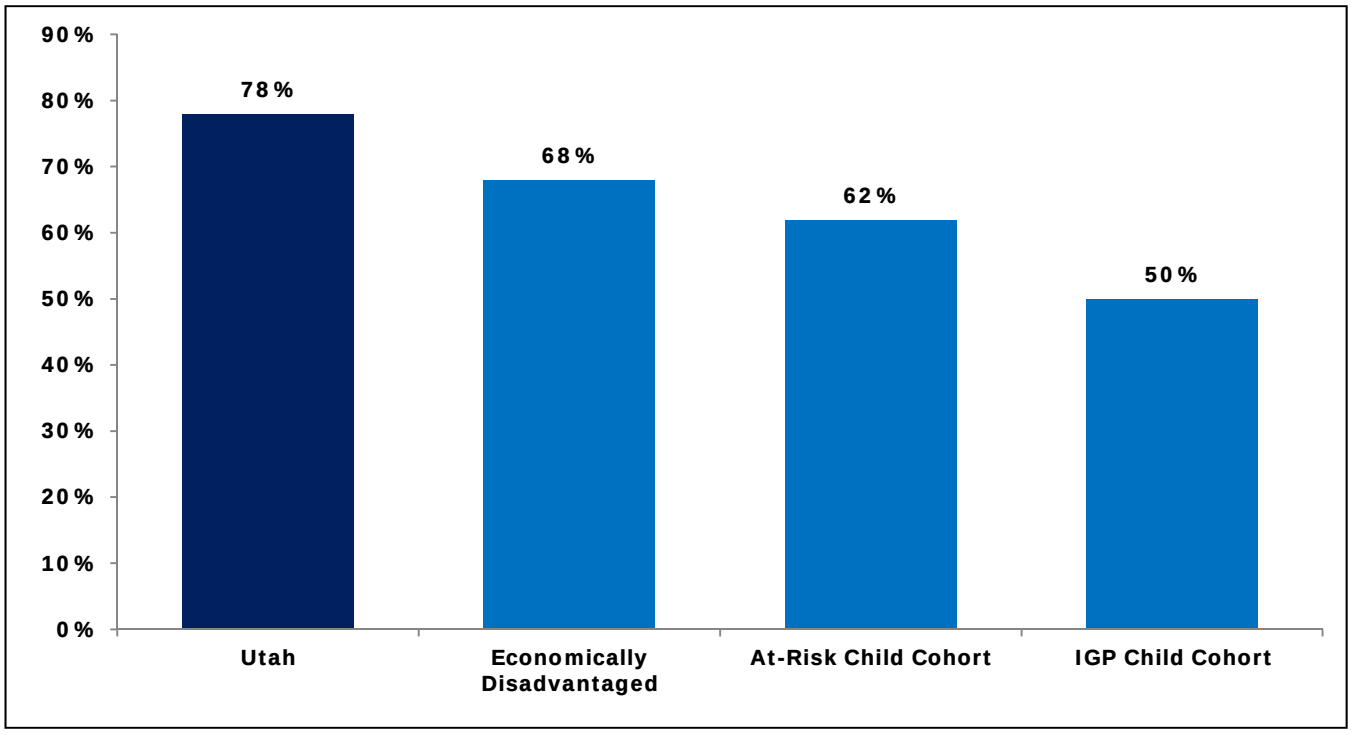
Source: Utah Department of Workforce Services IGP = Intergenerational Poverty

Figure 23.4
Average Annual Wages: 2013



Source: Utah Department of Workforce Services IGP = Intergenerational Poverty

Figure 23.5
High School Graduation Rates: SY2012



Source: Utah Department of Workforce Services IGP = Intergenerational Poverty

Economic Mobility, Inequality, and "The American Dream"

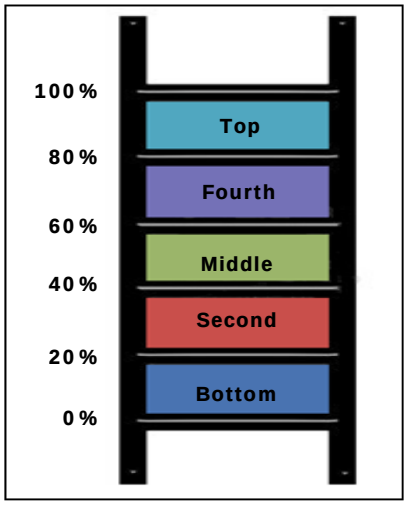
Three interrelated concept, economic mobility, inequality, and "The American Dream", have received a wealth of media coverage in recent years. This is due to at least three recent events. President Barack Obama highlighted them in his 2014 State of the Union address, and many times before and since.[1] Pope Francis has often spoken about inequality since his 2013 apostolic exhortation, and as recently as April 28, 2014, when he tweeted that "Inequality is the root of social evil."[2] Further, *Capital in the Twenty-First Century* has raised the question of inequality in many economic debates, and has created even more media attention more recently in light of the Financial Times assertions regarding Thomas Piketty's methodology."[3]

These issues have also been popular in the local media as well. The Equality of Opportunity Project received broad attention in Utah for its work on income mobility, due in large part to Utah's rankings. Using tax record data, the project examined economic mobility across the United States. Economic mobility is most often measured by looking at five equally-sized income percentiles. Each fifth of the income and wealth spectrum is referred to as a quintile.

The Equality of Opportunity Project ranked Vernal, Utah seventh among 709 communities across the nation for the odds of its community members starting at the bottom quintile and reaching the top quintile. Provo, Logan, Price, and Richfield had odds that were a bit higher than half of that of Vernal, while Moab, Salt Lake City, and St. George were slightly less than half of Vernal. Several North and South Dakota communities topped the list, all of which, like Vernal, are heavily geared toward oil and gas operations.

Of the top 100 largest cities, San Jose, California residents had the highest odds of reaching the top quintile from the bottom quintile (12.9 percent), with Salt Lake City ranking eighth (10.8 percent). Salt Lake City was first in absolute upward mobility but only 87th in relative upward mobility. Absolute mobility looks at average earnings growth, while relative mobility looks at the rank on the earnings ladder of all people in the nation. This shows that while Salt Lake City has high mobility nationally as a percentage of income, it is not as high in dollar amounts. Memphis, Tennessee had the lowest large-city odds of its bottom quintile residents reaching the top (2.8 percent).

Figure 24.1
Rungs of the Economic Income and Wealth "Ladder"



The Equality of Opportunity Project findings indicate that less segregation, less income inequality, better schools, greater social capital, and more stable families lead to greater mobility. Due to these factors, there is a wide range of mobility across the country.

The Pew Charitable Trusts also studied economic mobility over a 10-year period using three measures: absolute mobility (average earnings growth) and relative upward and downward mobility, each of which look at the ranking on the earnings ladder of all people in the nation. They show that Utah and seven other states have consistently better mobility than the national average. Each of the seven other states is located in the Northeast, except Michigan. Nine states had consistently worse mobility, all of which are in the South. Of its neighboring states, Utah residents have the highest absolute and upward mobility.

Their findings on affecting mobility include: Financial Capital, Social Capital, and Human Capital.

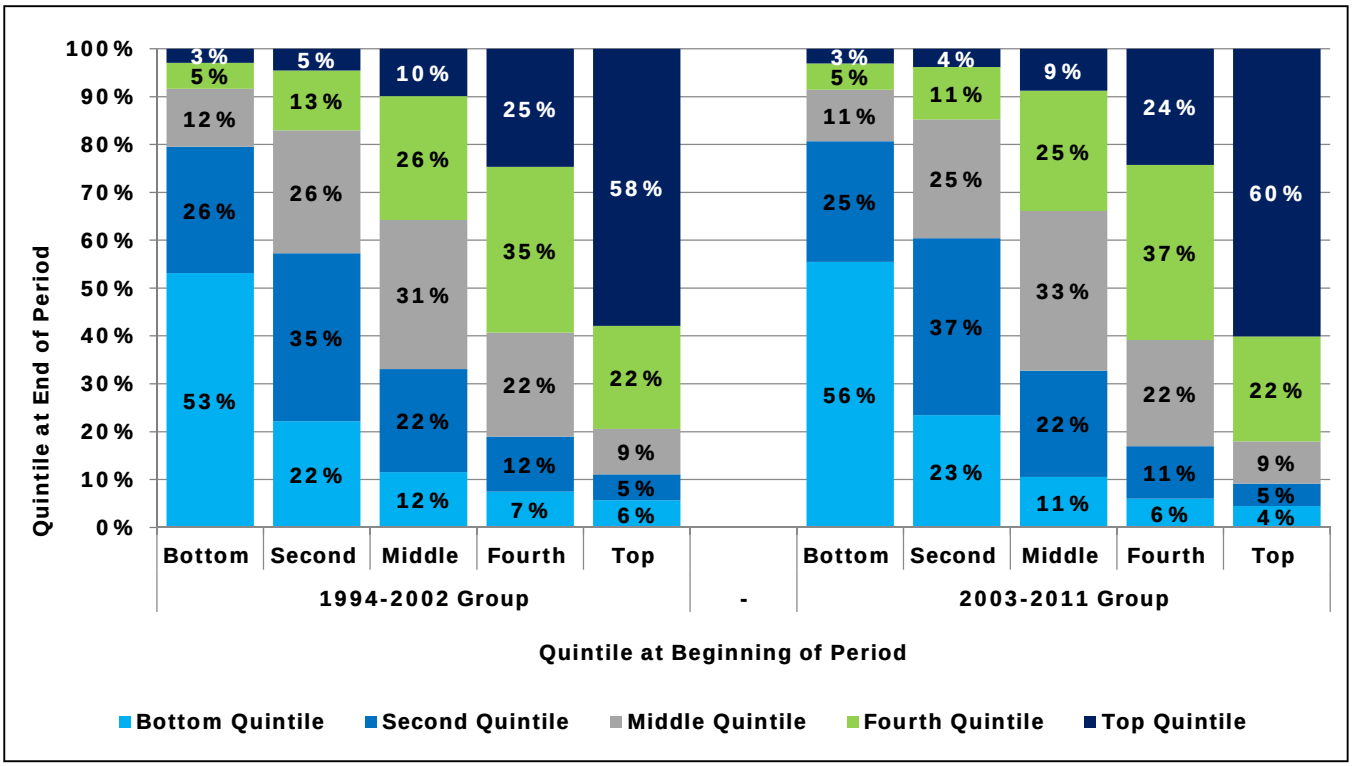
Figure 24.2
Mobility in U.S. Cities

Commuting Zone	State	Absolute Upward Mobility	Relative Upward Mobility	Odds of Reaching Top Fifth Starting from Bottom Fifth
Best in the Nation				
Dickinson	North Dakota	64.0	0.153	32.9%
Utah				
Vernal	Utah	56.6	0.235	25.3%
Provo	Utah	49.3	0.183	13.8%
Logan	Utah	50.5	0.189	13.7%
Price	Utah	50.0	0.255	13.7%
Richfield	Utah	51.0	0.254	12.9%
Moab	Utah	46.1	0.339	11.8%
Salt Lake City	Utah	46.2	0.264	10.8%
St. George	Utah	46.2	0.237	10.8%
Worst in the Nation				
Greenville	Mississippi	33.6	0.471	2.2%

Source: Equality of Opportunity Project

1. http://www.whitehouse.gov/the-press-office/2014/01/28/president-barack-obamas-state-union-address
2. https://twitter.com/Pontifex/status/460697074585980928
3. http://www.nytimes.com/2014/05/31/upshot/everything-you-need-to-know-about-thomas-piketty-vs-the-financial-times.html?_r=2&abt=0002&abg=1

Figure 24.3
Mobility Relative to the Panel Population, Utah, 1994-2002 and 2003-2011



Source: Utah State Tax Commission and Utah Foundation

Pew analysis of the Panel Study of Income Dynamics found that Americans who move up from the bottom have much more financial capital, with more than twice the income and nearly 10 times the wealth of those who do not. The social capital of neighborhoods is important as a majority (66 percent) of black children were born into and live in high-poverty (>20 percent) neighborhoods versus just 6 percent of white children. With regard to human capital, it found that a primary way out of poverty is education; forty-seven percent of people born into the bottom quintile without a college degree remained as such, while only ten percent of those with a college degree advanced.

Figure 24.4
Mobility in U.S. Cities

	Absolute	Relative Upward	Relative Downward
Nation	17%	34%	28%
Utah	23%	44%	28%
Colorado	19%	43%	31%
Alaska/Idaho/Montana/Wyoming	16%	32%	40%
New Mexico	14%	34%	35%
Nevada	17%	36%	34%
Arizona	15%	36%	33%

Source: Pew analysis of Panel Study of Income Dynamics

The Utah Foundation released a report in 2013 titled "Climbing Toward the American Dream: A Second Analysis of Economic Mobility in Utah."[4] The report was produced in collaboration with the Utah State Tax Commission using hundreds of thousands of individual state income tax filings and employing several different mobility measures developed by the U.S. Treasury Department, the Brookings Institution, and the Economic Mobility Project. The Economic Mobility Project is a nonpartisan, collaborative effort of the American Enterprise Institute, The Brookings Institution, The Heritage Foundation, and The Urban Institute, and is led by the Pew Charitable Trusts.

The report compared income from 1994 through 2002 and from 2003 through 2011. The Utah Foundation found that mobility over the periods is decreasing, with more people staying within their respective income groups in the more recent nine-year period than the previous one. The data

4. http://www.utahfoundation.org/reports/climbing-toward-the-american-dream-a-second-analysis-of-economic-mobility-in-utah/

shows income mobility is most common for people in middle income groups. In contrast, mobility within the top and bottom quintiles is least likely as most people in the bottom and top quintiles remain as such.

A majority of tax filers had higher incomes by the end of the study periods, though less than one third were upwardly mobile into higher quintiles. Furthermore, the more recent nine-year period had a twelve percentile point increase in people who were downwardly mobile with less income.

Figure 24.5
Combined Relative and Absolute Income Mobility, Based on 2011 Dollars, Utah, 1994-2002 and 2003-2011

Mobility Category	Lowest Quintile	Second Quintile	Middle Quintile	Fourth Quintile	Highest Quintile	All Taxpayers
Income Quintile in 1994						
Upward Mobile *Higher income and up 1 or more quintiles*	47%	43%	36%	25%	na	30%
Riding the Tide *Higher income and same quintile*	37%	33%	31%	34%	48%	36%
Falling Despite the Tide *Higher income and down 1 quintile*	na	3%	8%	9%	7%	6%
Downward Mobile *Lower income and lower or same quintile*	16%	21%	25%	32%	45%	28%
Total	100%	100%	100%	100%	100%	100%
Income Quintile in 2003						
Upward Mobile *Higher income and up 1 or more quintiles*	45%	39%	34%	24%	na	28%
Riding the Tide *Higher income and same quintile*	30%	27%	28%	31%	45%	31%
Falling Despite the Tide *Higher income and down 1 quintile*	na	0%	2%	3%	3%	2%
Downward Mobile *Lower income and lower or same quintile*	25%	34%	36%	41%	53%	39%
Total	100%	100%	100%	100%	100%	100%

Note: Columns may not add to 100% because of rounding.

Source: Utah State Tax Commission and Utah Foundation

In order to compliment the mobility analysis, the report also detailed inequality metrics. While Utah's income inequality is near the lowest in the nation, it is on the rise. While much of the increase in inequality has come from the top 1 percent in recent decades, top 1 percent income shares are not strongly associated with mobility levels.[5]

Figure 24.6
The U.S. and Utah are Trending Toward More Inequality

Inequality Index (Gini coefficients)

	1980	1990	2000	2006	2007	2008	2009	2010	2011	2012	2013
Utah	0.371	0.395	0.41	0.41	0.409	0.411	0.414	0.419	0.425	0.424	0.426
U.S.	0.415	0.445	0.463	0.464	0.467	0.469	0.469	0.469	0.475	0.476	0.481

Note: A limitation to this measure is that it looks only at income, not capital gains or wealth which comprise a majority of the difference between those at the top of the income spectrum and those at the bottom.

Source: U.S. Census Bureau, American Community Survey, 2006-2013, 1-year samples; Censuses of Population, Statistics Branch/HHES Division, 1980-2000

The "American Dream" can be defined as a national ethos of the United States, a set of ideals in which freedom includes the opportunity for prosperity and success, and an upward social mobility achieved through hard work. These definitions may be a reality for many but not for everyone; recent surveys report that the idea of this ethos is fleeting.[6] It has yet to be seen whether economic stability will increase Americans hope for themselves as well as future generations.

5. Raj Chetty et al.
6. http://www.utahfoundation.org/reports/climbing-toward-the-american-dream-a-second-analysis-of-economic-mobility-in-utah/