ECONOMIC REPORT *to the* GOVERNOR

PREPARED BY THE
UTAH ECONOMIC COUNCIL

2020

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

Utah Economic Council
DAVID ECCLES SCHOOL OF BUSINESS

Preface

The 2020 Economic Report to the Governor is the 32nd publication in this series. Through the last three decades, the Economic Report to the Governor has served as the preeminent source for data, research, and analysis about 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 and Collaborators

The 2020 Economic Report to the Governor is published by 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 Economic Council and Kem C. Gardner Policy Institute, and 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 2019. Readers should refer to noted sources later in 2020 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, contact the contributing authority.

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 Kem C. Gardner Policy Institute, 411 East South Temple Street, Salt Lake City, Utah 84111 or by email at gardnerinstitute@eccles.utah.edu.

Electronic Access

This report is available on the Kem C. Gardner Policy Institute's website at gardner.utah.edu.

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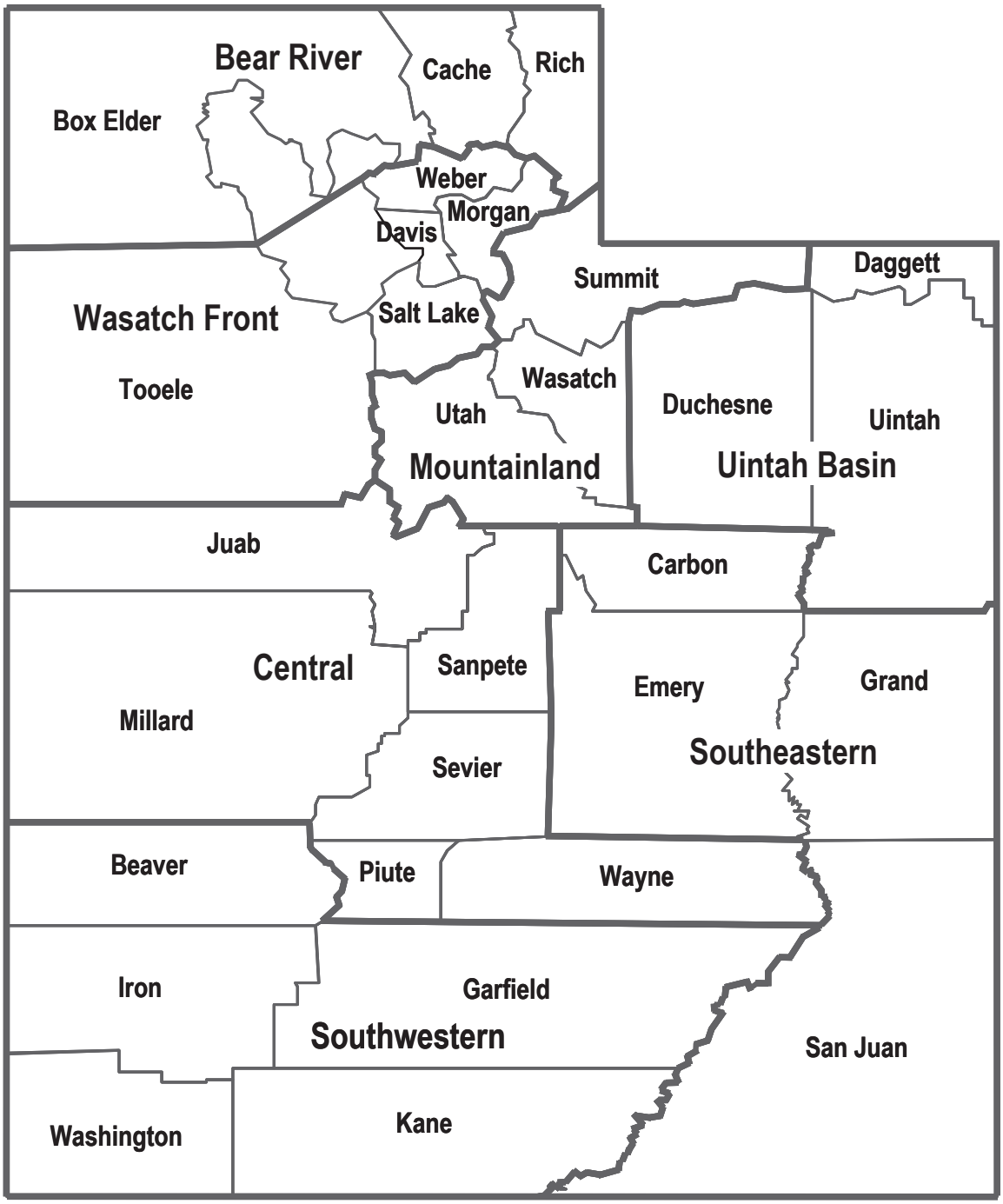
Map of Utah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Cache
Rich
Box Elder
Weber
Morgan
Davis
Summit
Daggett
Wasatch Front
Salt Lake
Tooele
Wasatch
Utah
Duchesne
Uintah
Mountainland
Uintah Basin
Juab
Carbon
Central
Sanpete
Emery
Grand
Millard
Sevier
Southeastern
Beaver
Piute
Wayne
Iron
Garfield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

Economic Indicators for Utah and the United States, December 2019

DEMOGRAPHICS	UNITS	2017 ACTUAL	2018 ACTUAL	2019 ESTIMATE	2020 FORE-CAST	PERCENT CHANGE 17–18	18–19	19–20
U.S. July 1st Population	Millions	326	328	330	332	0.6	0.7	0.7
Utah July 1st Population	Thousands	3,114	3,167	3,220	3,274	1.7	1.7	1.7
Utah Net Migration	Thousands	27.0	23.2	23.3	24.8	-14.0	0.3	6.6
Utah Households	Thousands	1,038	1,061	1,086	1,112	2.2	2.4	2.4
EMPLOYMENT AND WAGES								
U.S. Nonfarm Employment (BLS)	Millions	146.6	149.1	151.4	153.2	1.7	1.6	1.2
U.S. Unemployment Rate (BLS)	Percent	4.4	3.9	3.7	3.5			
U.S. Total Nonfarm Wages (BLS)	Billion Dollars	7,968	8,367	8,774	9,137	5.0	4.9	4.1
U.S. Average Annual Pay (BLS)	Dollars	54,348	56,130	57,959	59,662	3.3	3.3	2.9
U.S. Personal Income (BEA)	Billion Dollars	16,879	17,819	18,620	19,301	5.6	4.5	3.7
Utah Nonfarm Employment (DWS)	Thousands	1,469	1,517	1,563	1,605	3.3	3.0	2.7
Utah Unemployment Rate (DWS)	Percent	3.3	3.1	2.7	2.5			
Utah Total Nonfarm Wages (DWS)	Million Dollars	67,174	72,277	77,214	82,867	7.6	6.8	7.3
Utah Average Annual Pay (DWS)	Dollars	45,728	47,630	49,401	51,624	4.2	3.7	4.5
Utah Personal Income (BEA)	Million Dollars	136,544	146,423	155,244	164,559	7.2	6.0	6.0
PRODUCTION AND SALES								
U.S. Real Gross Domestic Product	Billion Chained $2012	18,108	18,638	19,068	19,462	2.9	2.3	2.1
U.S. Real Exports	Billion Chained $2012	2,459	2,533	2,524	2,560	3.0	-0.3	1.4
U.S. Retail Sales	Billion Dollars	5,747	6,023	6,242	6,475	4.8	3.6	3.7
Utah Exports (NAICS, Census)	Million Dollars	11,583.0	14,388	16,541	19,773	24.2	15.0	19.5
Utah All Taxable Sales	Million Dollars	61,032	64,983	67,842	71,343	6.5	4.4	5.2
REAL ESTATE AND CONSTRUCTION								
U.S. Private Residential Investment	Billion Dollars	756	787	797	831	4.1	1.4	4.2
U.S. Nonresidential Structures	Billion Dollars	587	633	624	612	7.9	-1.4	-2.0
U.S. Purchase-only Home Price Index	1991Q1 = 100	245	261	274	285	6.6	5.1	3.8
Utah Dwelling Unit Permits	Thousands	22.9	24.2	26.9	26.0	5.8	11.2	-3.3
Utah Residential Permit Value	Million Dollars	4,653	5,152	5,700	5,800	10.7	10.6	1.8
Utah Nonresidential Permit Value	Million Dollars	2,268	2,166	2,250	2,000	-4.5	3.9	-11.1
Utah Purchase-only Home Price Index	1991Q1 = 100	446	493	528	561	10.5	7.1	6.3
ENERGY PRODUCTION AND PRICES								
West Texas Intermediate Crude Oil	$ Per Barrel	51.0	64.9	56.7	52.0	27.4	-12.6	-8.3
Utah Coal Production	Million Tons	14.4	13.8	15.5	16.5	-4.2	12.3	6.5
Utah Coal Prices	$ Per Short Ton	34.2	33.0	34.0	35.0	-3.5	3.0	2.9
Utah Crude Oil Production	Million Barrels	34.4	37.0	36.9	36.5	7.6	-0.3	-1.1
Utah Oil Prices	$ Per Barrel	44.2	57.1	48.0	47.0	29.2	-15.9	-2.1
Utah Natural Gas Production Sales	Billion Cubic Feet	278	250	235	224	-10.1	-6.0	-4.7
Utah Natural Gas Prices	$ Per MCF	2.72	2.77	2.80	2.50	1.8	1.1	-10.7
Utah Copper Mined Production	Million Pounds	334	466	425	440	39.5	-8.8	3.5
Utah Copper Prices	$ Per Pound	2.85	3.00	2.72	2.65	5.3	-9.3	-2.6
PRICES, INFLATION, AND INTEREST RATES								
U.S. CPI Urban Consumers	1982-84 = 100	245	251	256	260	2.4	1.8	1.8
U.S. Federal Funds Rate	Effective Rate	1.00	1.83	2.17	1.63			
U.S. 3-Month Treasury Bills	Discount Rate	0.93	1.94	2.06	1.54			
U.S. 10-Year Treasury Notes	Yield (%)	2.33	2.91	2.14	2.12			
30-Year Fixed Mortgage Rate	Percent	3.99	4.54	3.93	3.92			

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

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Report Overview

Darin Mellott, CBRE
Juliette Tennert, Kem C. Gardner Policy Institute

UTAH

The Utah economy continues to prosper. Like the nation, the state's decade-long economic expansion became the longest on record in 2019. Every major industrial sector expanded over the last year, adding 45,600 new jobs to the economy. The annual employment growth rate of 3.0 percent in 2019 was at the state's long-term average and among the strongest in the nation.

Fueled by record-level residential and near-record commercial activity, Utah's construction sector added 4,500 jobs and posted the state's fastest pace of job growth in 2019, 4.3 percent. The boom in the multifamily sector, primarily apartment construction, drove a 10.9 percent increase in the value of all permit-authorized residential construction to $5.7 billion. The value of permit-authorized nonresidential construction grew 6.2 percent in 2019 to $2.3 billion, the highest posting since 2016's $2.7 billion.

Low unemployment and rising wages for Utahns, along with an increase in travel and tourism activity, supported strong job growth of 4.1 percent in the state's leisure and hospitality sector over the past year. Above-average snowfall and an extended 2018-2019 ski season led to a record $1.4 billion in skier spending. With increased marketing emphasis on places to visit in addition to the Mighty 5 national parks, Utah's state parks hosted a record number of visitors in 2019.

Utah's population grew by 53,600 to reach 3.2 million in 2019. About 47 percent of this growth came from net in-migration as people moved to the state to take advantage of economic opportunity. Natural increase continued to generate the majority of growth, 53 percent, despite births dropping to the lowest level since 2000.

The consensus forecast predicts increasing uncertainty and moderation, but still healthy growth for the Utah economy. Internal risks in 2020 and beyond include a tight labor market, increasing costs, housing affordability, declining fertility rates, and air quality. Externally, a late U.S. business cycle, trade tensions, and geopolitical instability add risk to the forecast.

State tax cuts and infrastructure spending present an upside risk for the 2020 Utah economy. Favorable demographics, a supportive business climate, and economic diversity will continue to advantage the economy. As long as major risks to the national expansion are not realized, Utah's economy will once again be one of the top performing economies in the nation in 2020.

UNITED STATES

The U.S. economy in 2019 continued to expand, albeit at a slower rate. Real GDP decelerated slightly, and job creation moderated. Unemployment continued to decline, measuring an estimated 3.7% for the year, the lowest in over 50 years. Equity markets continued to climb, even as U.S. businesses, particularly in the manufacturing and agricultural sectors grabbled with trade uncertainty. Geopolitical conflicts, especially at the end of 2019, tempered enthusiasm about what is now the longest U.S. economic expansion on record.

The U.S will see continued growth in 2020 with GDP expanding by 2.1% during the year. Still, risks to the outlook remain. As such, uncertainty will temper economic growth, but it will remain near its estimated long-term potential.

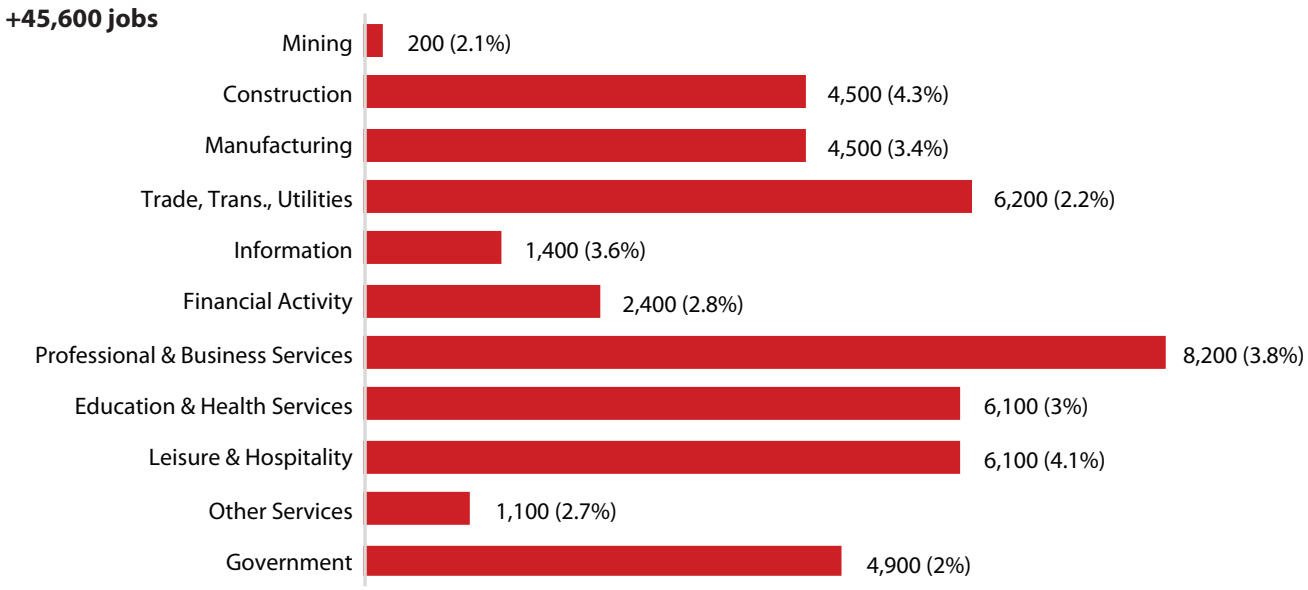
Importantly, when looking ahead, consumers are in a good position going into 2020. This is notable as consumer spending accounts for approximately two-thirds of U.S. economic activity. Low inflation, low interest rates, healthy wage gains—supported by unemployment rates near a 50-year low—and strong consumer sentiment provide a reasonably good outlook for consumer spending. Beyond a strong consumer sector, the lagged impact of Fed Rate cuts—with additional monetary accommodation possible—will support growth.

A primary risk to the U.S. and global economies in 2020 is trade tensions between the United States and China. Though a trade détente could materialize between now and the U.S. presidential election—

including a "phase one" deal—tensions between the world's two largest economies will continue beyond 2020. This will weigh on business sentiment to varying degrees. Beyond trade, a higher degree of policy uncertainty—be it from national security matters or questions surrounding industry-specific proposals—will be front and center in 2020 as the November elections approach. Even so, these issues will have less impact on growth than many headlines suggest.

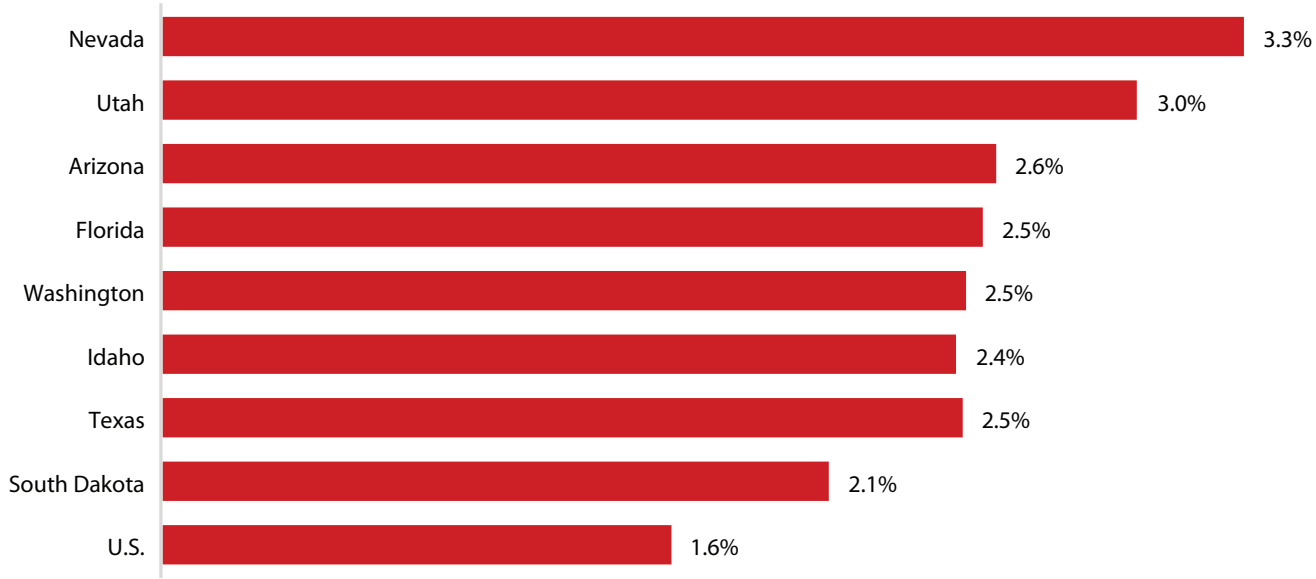
In short, uncertainty will be present, but growth will continue. This growth will be underpinned by a strong consumer, accommodative monetary policy and upside potential to growth associated with moderating trade tensions.

Utah Employment Growth, Level and Percent, 2018–2019



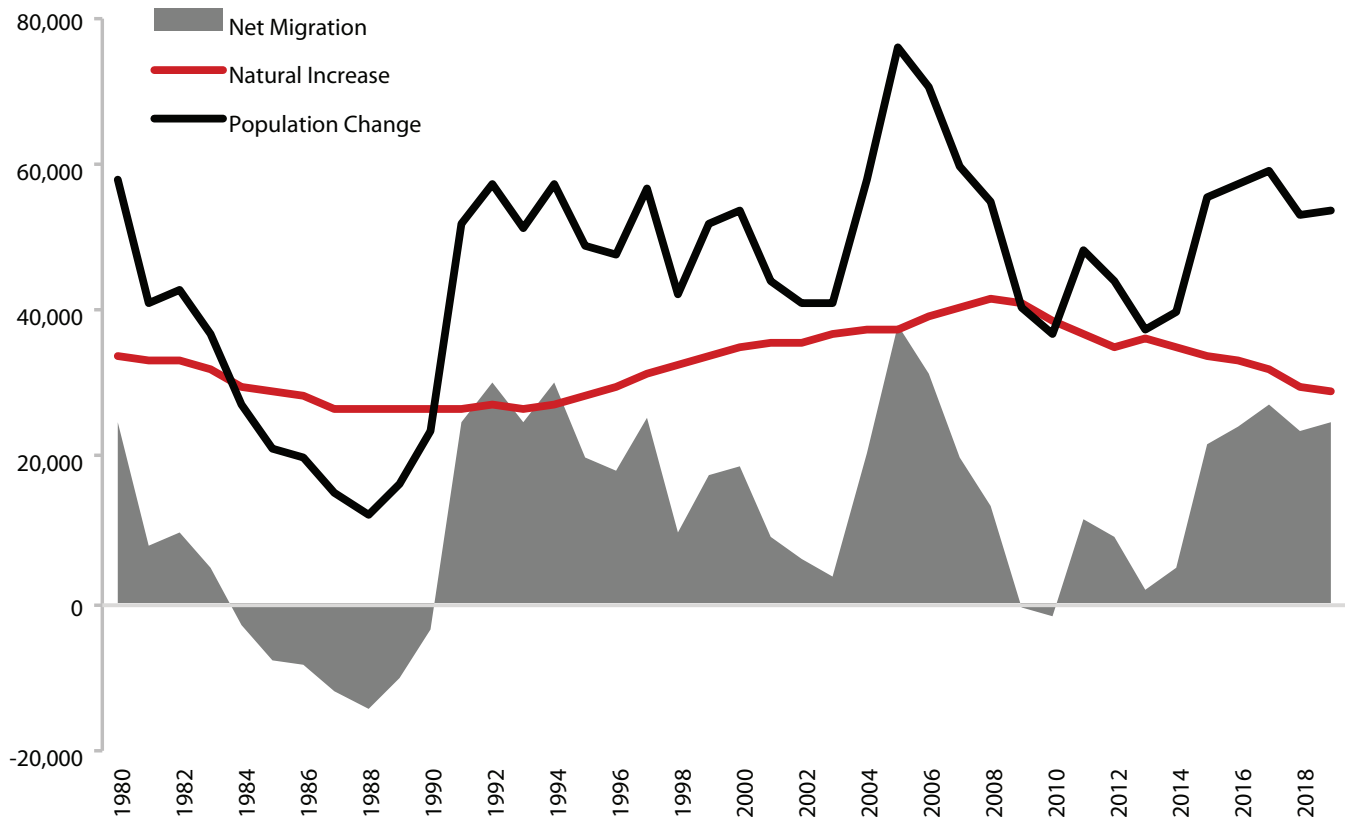
Source: U.S. Bureau of Labor Statistics and Kem C. Gardner Policy Institute

States with Strongest Job Growth, 2018–2019



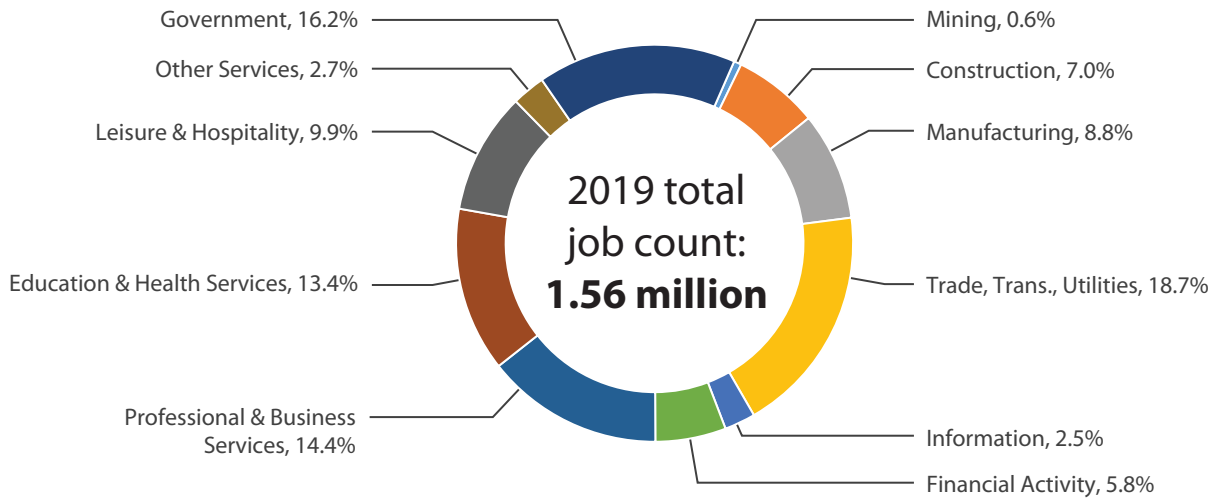
Source: U.S. Bureau of Labor Statistics and Kem C. Gardner Policy Institute

Utah Components of Population Change



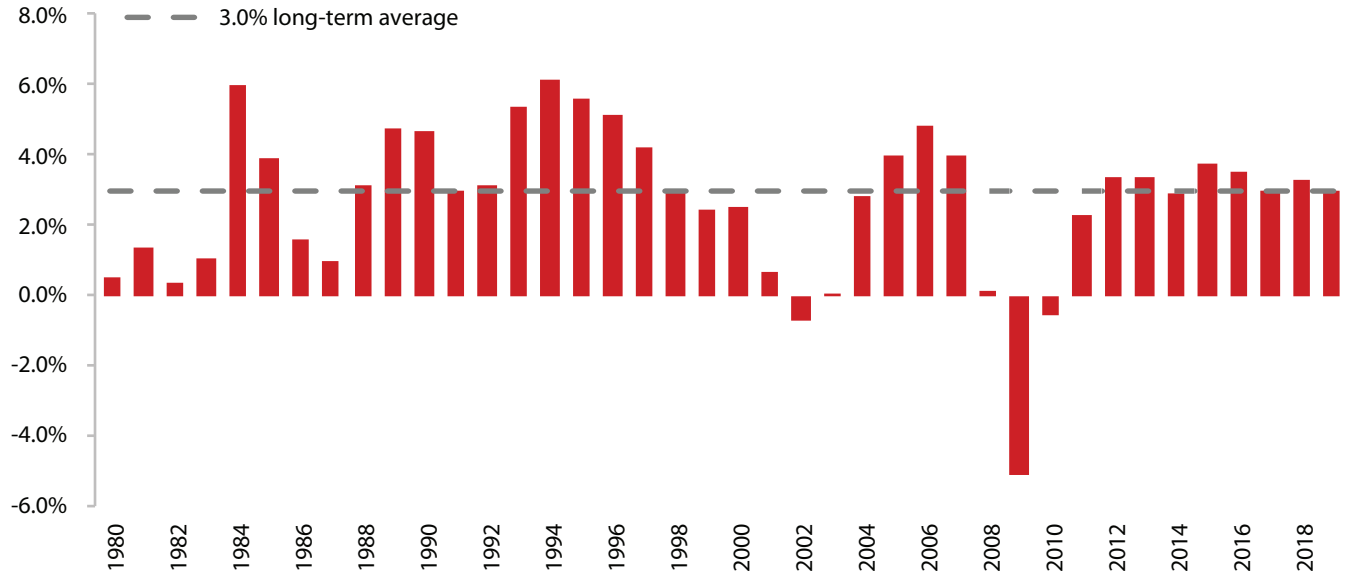
Source: Utah Population Committee

Total Share of Utah Jobs by Sector, 2019



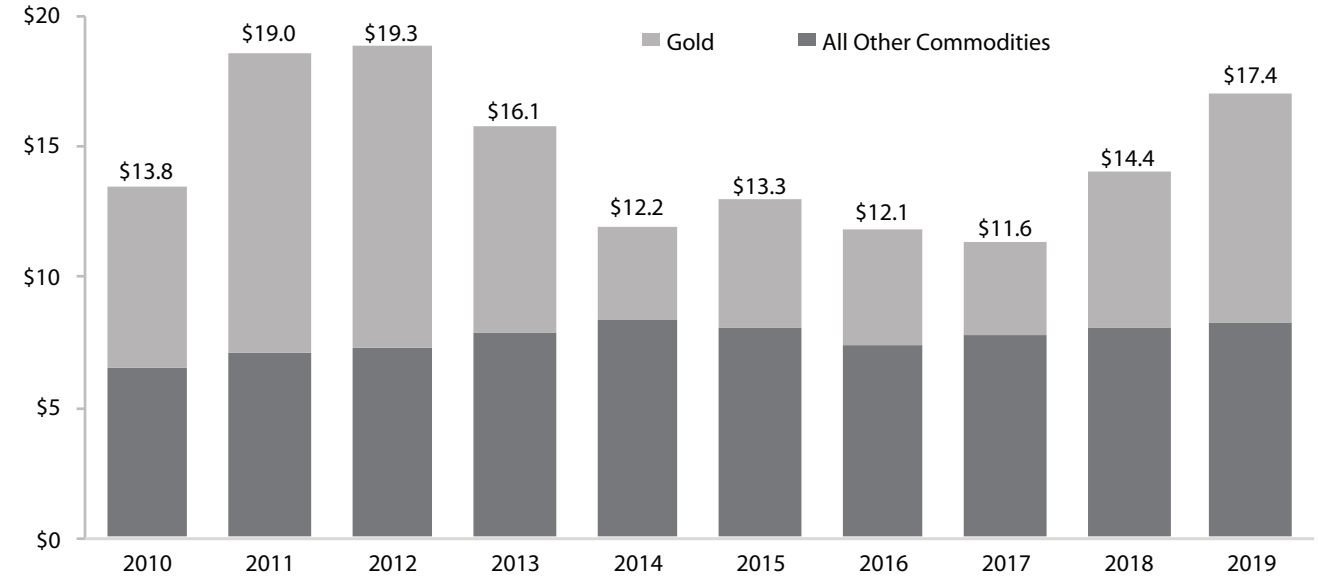
Source: U.S. Bureau of Labor Statistics and Kem C. Gardner Policy Institute

Utah Annual Job Growth History



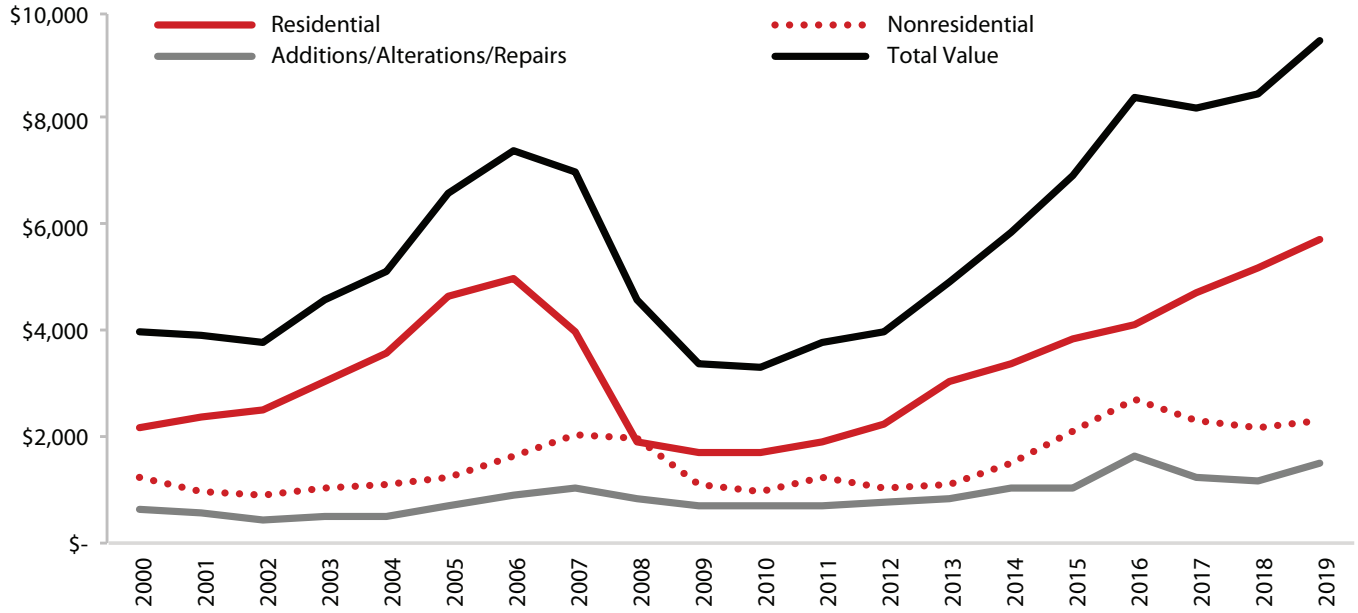
Source: U.S. Bureau of Labor Statistics

Utah International Exports, $ billions



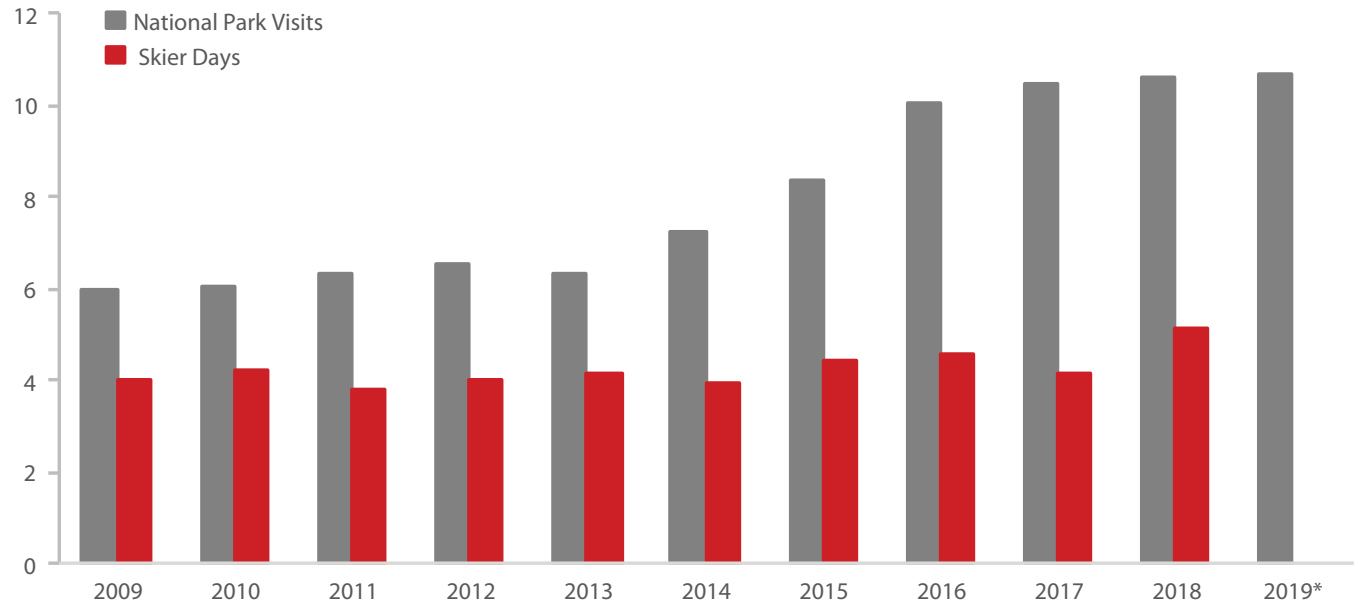
Source: U.S. Census Bureau

Utah Value of New Construction, $ millions



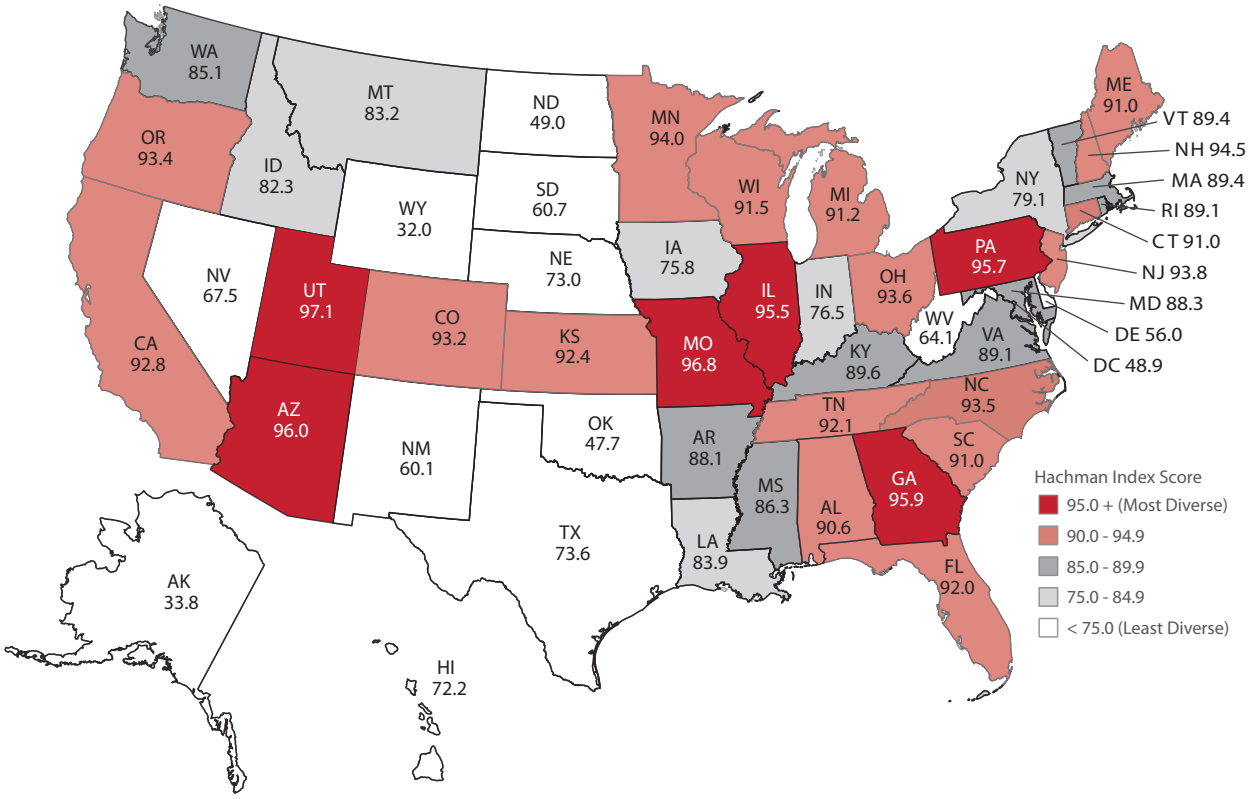
Sources: Kem C. Gardner Policy Institute

Utah National Park and Skier Visits, millions



*2019 skier days will be released in June 2020. Skier days include season that begins with year shown (e.g. 2018 = 2018-2019 ski season).
Source: U.S. National Park Service and Ski Utah

Hachman Index for States, 2018



Sources: Kem C. Gardner Policy Institute

Demographics

1

Mallory Bateman, Kem C. Gardner Policy Institute

2019 OVERVIEW

The last year of the decade presented a continuation of trends with a few new twists. The moderated population growth of the past several years continued in 2019, with the annual growth rate of 1.69% remaining unchanged from 2018. Net in-migration increased slightly. Natural increase continued to decline while remaining positive. Utahns are continuing to age and become more diverse.

State Population Estimates

Utah's population grew by 53,596 and reached 3,220,262 by July 1, 2019, according to estimates prepared by the Utah Population Committee (UPC). This moderated growth contributed to an increase of 456,377 new Utahns since the 2010 Census. Census Bureau estimates indicate that Utah was the fastest-growing state in the nation between 2010 and 2019.

Utah's total components of population change, the sum of natural increase and net migration, increased by 913 since 2018. Net migration (in-migration minus out-migration) as a share of population growth contributed 47% of growth. Net migration grew as both a share of population growth as well as in absolute terms in 2019, increasing to 24,987 from just over 23,000 in 2018. Natural increase remains the mainstay of population growth, contributing 28,609 persons, which is over half (53%) of population growth.

Total Fertility Rate reaches record low

Although Utah's total fertility rate was second in the nation behind South Dakota in 2017, Utah dropped to 4th highest in the most recent data. South Dakota, North Dakota, and Nebraska all had higher total fertility rates. This drop in ranking was due to Utah's total fertility rate dropping to 2.03, which is below replacement rate for the first time.

Total births for the state continued the trend of decline seen since 2008, dropping from 47,310 in 2017 to 47,209 in 2018.

Changes in age structure

Median age has been increasing nationwide as the Baby Boomer generation, the largest generational group before Millennials, ages, and fertility rates decrease. This trend is happening in Utah, with median age increasing from 29.2 years at the 2010 Census to 31.0 years in 2018. Nationally, median age increased from 37.2 to 38.2. Utah continues to have the youngest median age, the largest share of youth, and the lowest share of 65 and older adults in the nation at 11.1%.

Utah has the third-highest total dependency ratio in the nation at 68.3, behind Idaho and South Dakota. Nationally, the total dependency ratio is 62.5. Since 2010, the total dependency ratio has stayed nearly the same. The school-age (5-17 year old) population creates the largest impact on the total dependency ratio in Utah. However, the retirement-age (65 years and older) dependency ratio increased from 15.2 in 2010 to 18.7 in 2018.

Households and housing units

There were an estimated 3.12 people in an average Utah household in 2018 — the highest in the nation. This continues the shift closer to the 3.10 average household size in 2010, decreasing from an estimated increase in the first half of the decade. Nationally, an average household is 2.63 persons and has remained consistent for the past several years.

Between 2017 and 2018, Utah had the fastest growth in housing units in the nation, with an increase of 2.2%. This growth equates to 23,897 additional housing units. Washington and Utah counties had the fourth and ninth fastest housing unit growth nationally for counties with over 5,000 housing units.

Race and Hispanic Origin Populations Continue to Increase

The "minority" population (measured as the population that is not white alone and non-Hispanic) was estimated to be 22.0% of the Utah population in the July 1, 2018 Census Bureau estimates. San Juan County (56.4%), Salt Lake County (29.3%), and Weber

County (24.3%) all had minority shares higher than the state between 2017 and 2018. The minority population in San Juan County is predominantly the Native American population, while in Salt Lake and Weber counties, the dominant group is the Hispanic or Latino population.

While the Hispanic or Latino population is the largest minority group in the state, other groups had more significant increases in population since the 2010 Census. The non-Hispanic Asian population grew by 48.5% between 2010 and 2018 estimates. The non-Hispanic Two or More Races population also had an increase of 42.5%.

These three populations also happen to be the largest minority populations statewide. Utah's Hispanic or Latino population accounted for 14.2% of the total population (450,218 people) and grew by over 91,000 between 2010 and 2018. The non-Hispanic Asian population increased to over 81,000 and the non-Hispanic Two or More races population was over 66,000 in 2018. Increases in Utah's minority population contributed nearly 40% of total population growth from 2010 to 2018.

County Population Estimates

Seven counties in Utah had population increases of over 20% between the 2010 Census and the July 1, 2019 UPC Estimates. Wasatch County, which was the third fastest-growing county in the nation in both 2017 and 2018, was the fastest-growing in Utah with an increase of 39.7%. Washington, Morgan, Utah, Tooele, Juab, and Iron were the other high growth counties. Between 2018 and 2019, Washington, Tooele, and Utah were the fastest-growing counties.

Utah County had the largest overall increase since the 2010 Census, adding almost 135,000 new residents. Salt Lake County added over 100,000 residents. Between 2018 and 2019, Utah County added the most people with nearly 18,000 new additions. Salt Lake County added just over 10,000 residents, and Washington County added about 9,500.

Not all counties have grown throughout the decade. The populations of Emery and Wayne counties decreased between the 2010 Census and 2019 by 2.8% and 0.9%, respectively. Between 2018 and 2019, the populations of Grand (1.4%) and Rich (1.2%) counties both decreased.

Subcounty Populations

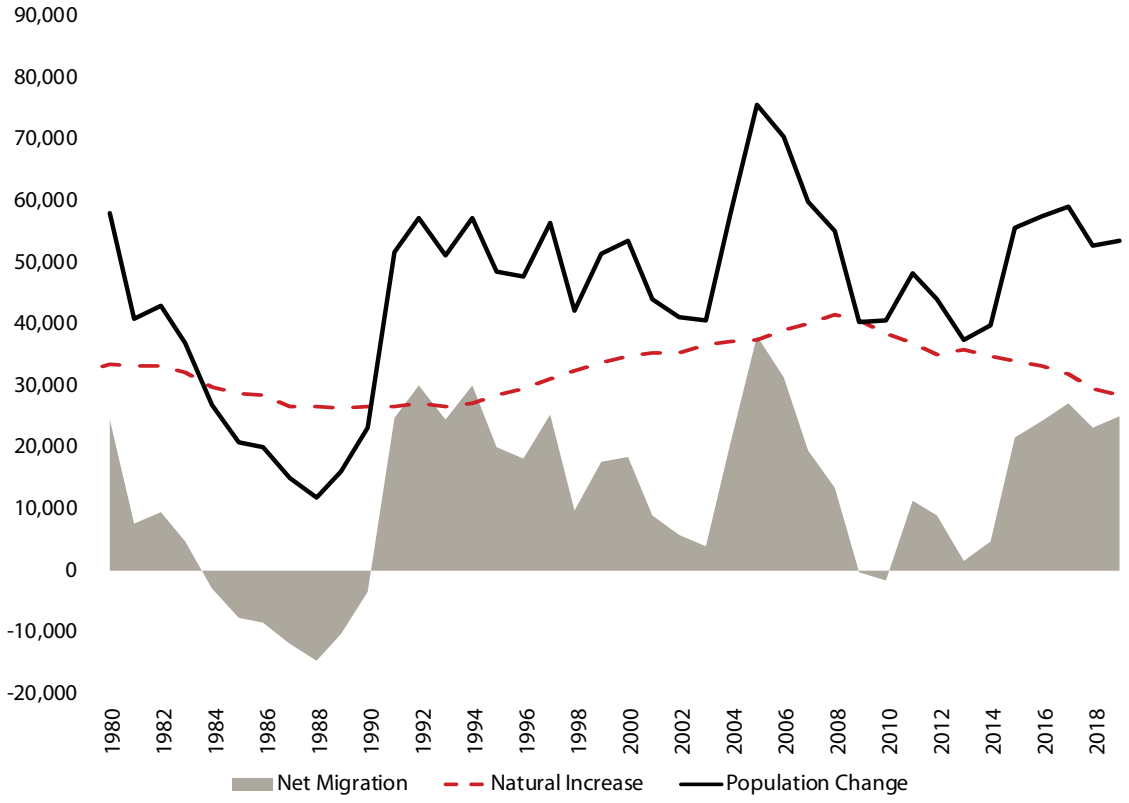
Salt Lake City, West Valley City, and Provo are the three largest cities in the state. The population of Salt Lake City showed marginal growth while West Valley City and Provo populations were estimated to have slightly declined between 2017 and 2018 according to the July 1, 2018 Census Bureau Population Estimates.

Vineyard was the fastest-growing small city in the nation at 62.8% over 2018. South Jordan was the 12th fastest growing city with a population of 50,000 or more between 2017 and 2018 (4.4%).

2020 OUTLOOK

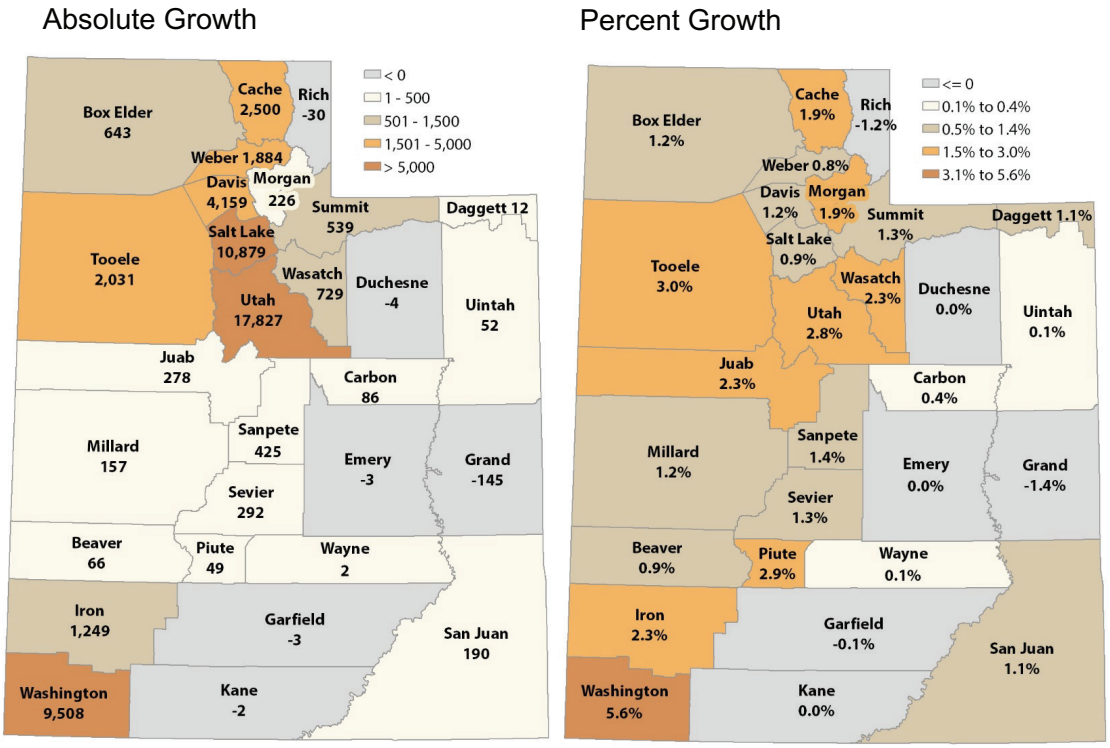
Projections indicate the population will continue to grow at a moderate pace to reach 3,270,729 by July 1, 2020. This includes the consideration that natural increase (births minus deaths) increase slightly, contributing 31,997 people to Utah's population. Net migration is expected to remain positive but moderate to 20,472. The 2020 Census, conducted in the spring, will provide a new set of baseline information to inform the 2020 decade.

Figure 1.1: State of Utah Components of Population Change



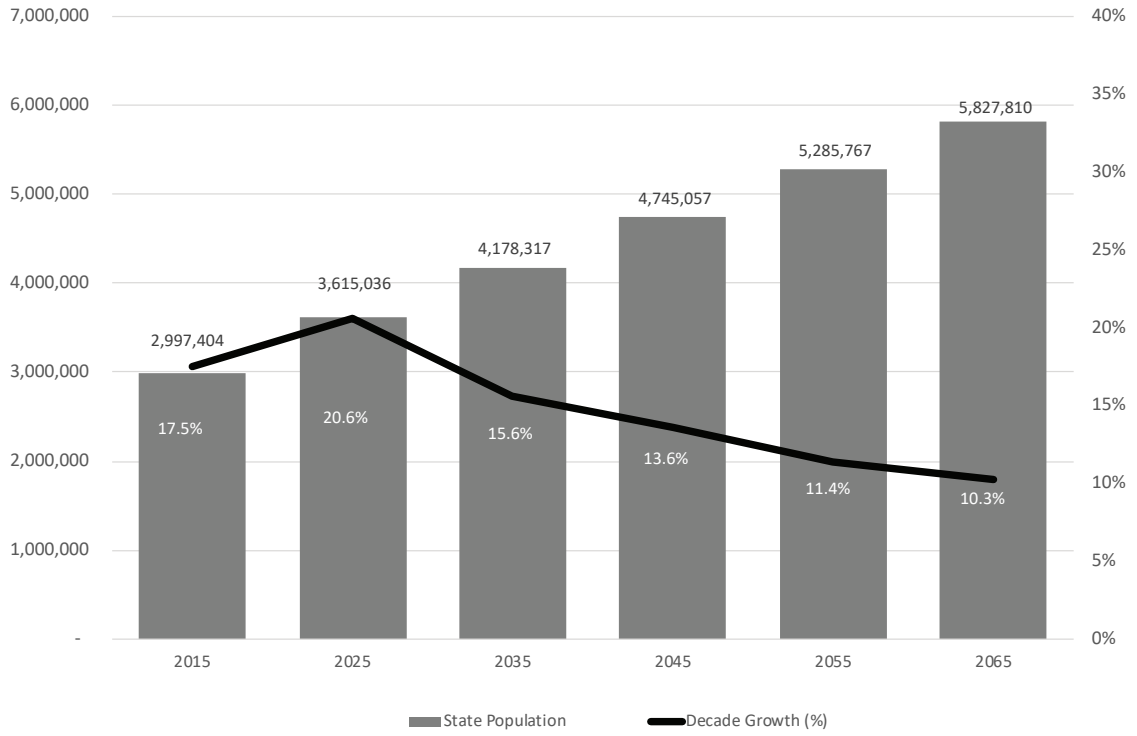
Source: Utah Population Estimates Committee and Utah Population Committee

Figure 1.2: Utah Population Growth by County: 2018-2019



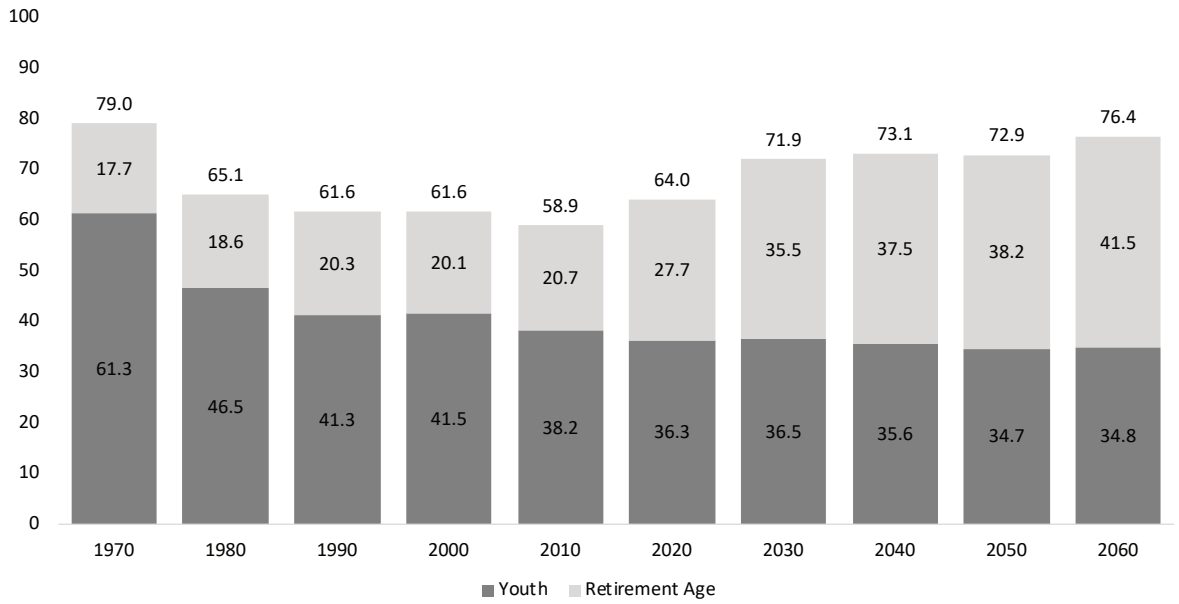
Source: Utah Population Committee

Figure 1.3: Utah Population and Growth Projections by Decade: 2015-2065



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

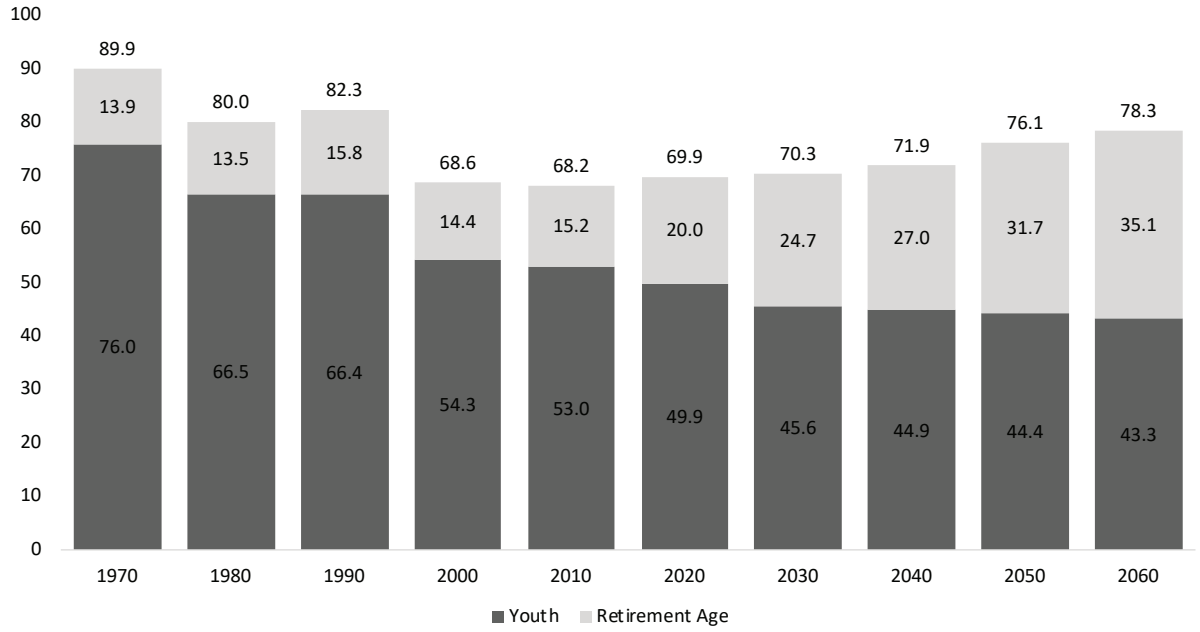
Figure 1.4: U.S. Dependency Ratios: 1970–2060



Note: Dependency Ratios are computed as the number of nonworking age persons per 100 working age (18-64 year old) persons in the population. Youth are less than 18 years old and retirement age is 65 years and older.

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

Figure 1.5: Utah Dependency Ratios: 1970–2060



Note: Dependency Ratios are computed as the number of nonworking age persons per 100 working age (18-64 year old) persons in the population. Youth are less than 18 years old and retirement age is 65 years and older.

Source: Kem C. Gardner Policy Institute analysis of U.S. Census Bureau Decennial Census data and Kem C. Gardner Policy Institute State Projections

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Figure 1.6: Natural Increase Annual Rate of Change: July 1, 2018 to July 1, 2019

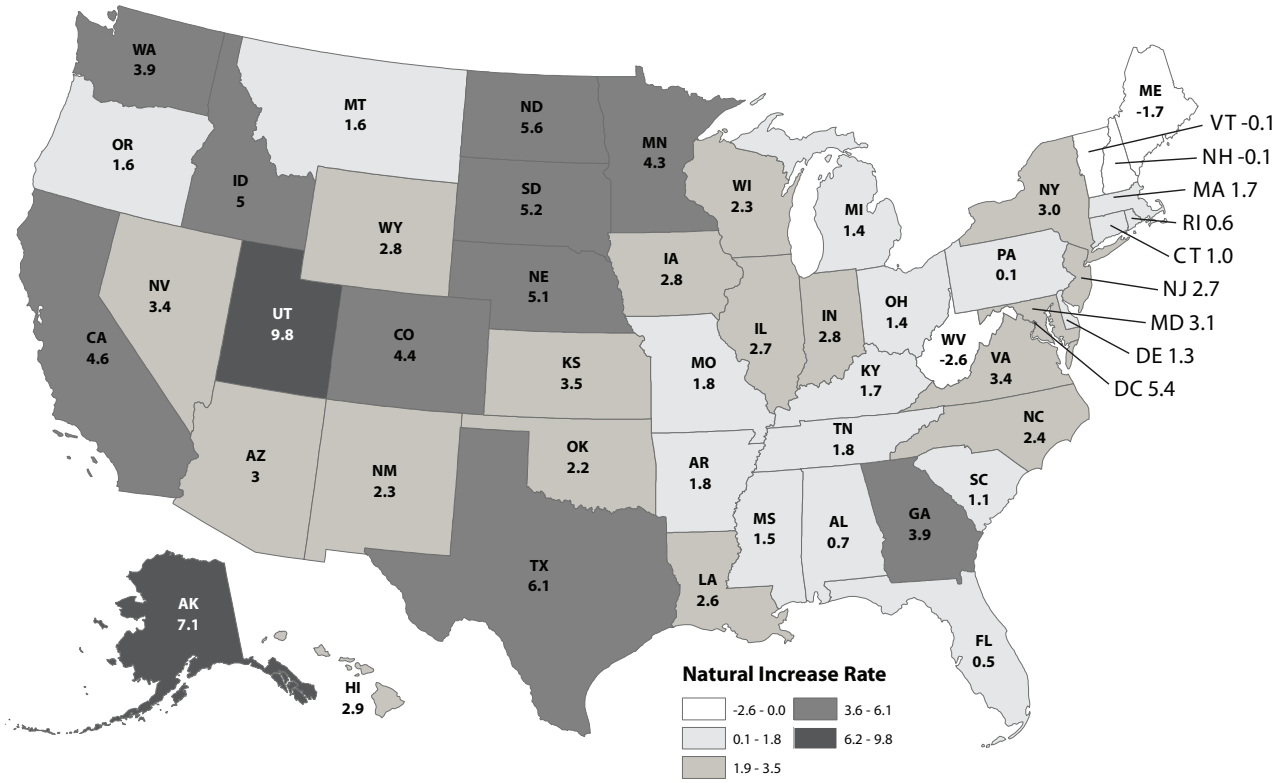
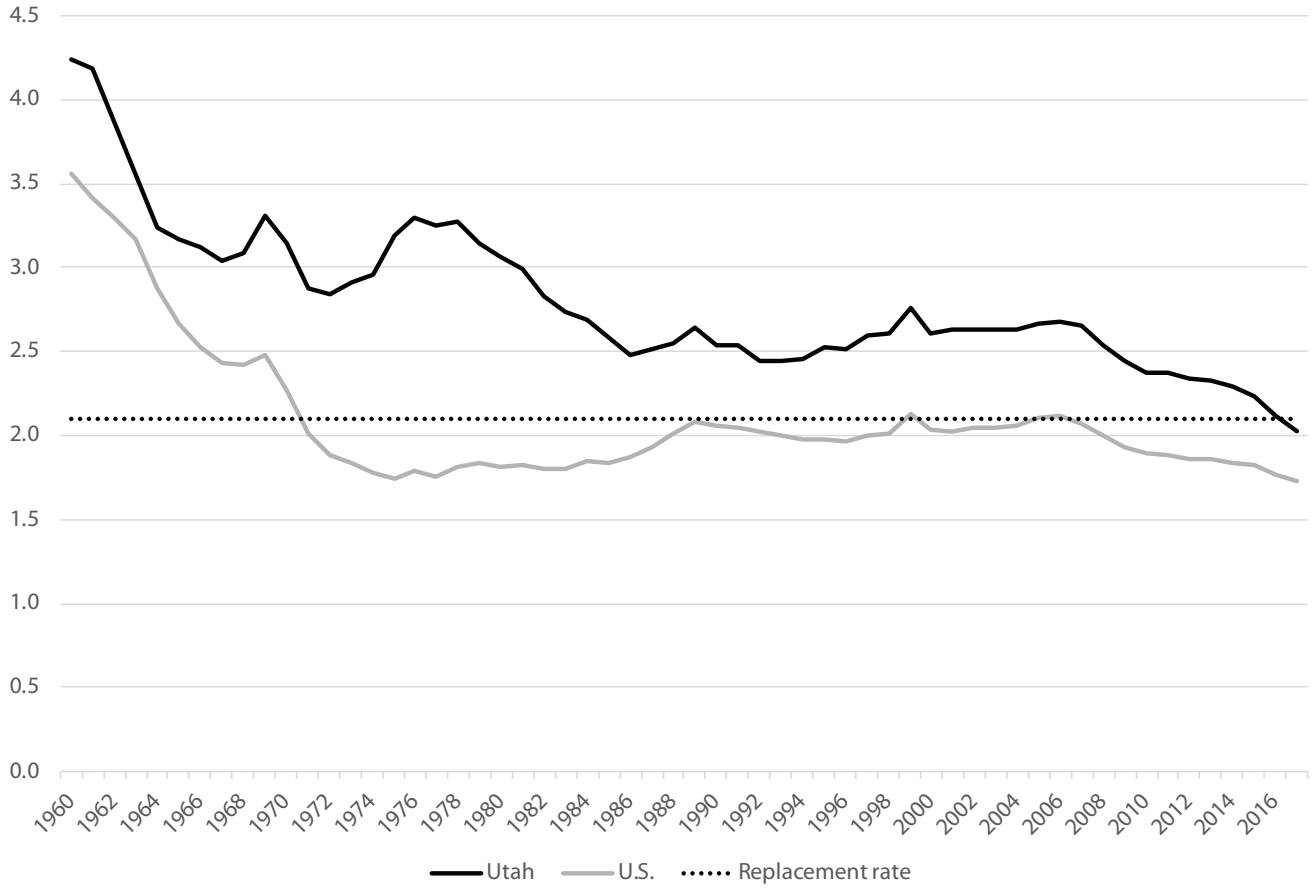


Figure 1.7: Total Fertility for Utah and the United States



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

Table 1.1: Utah Population Estimates by Components of Change

Year	July 1st Population	Percent Change	Increase	Net Migration	Natural Increase	Fiscal Year Births	Fiscal Year Deaths
1980	1,474,000	4.1%	58,050	24,536	33,514	41,645	8,131
1981	1,515,000	2.8%	41,000	7,612	33,388	41,509	8,121
1982	1,558,000	2.8%	43,000	9,662	33,338	41,773	8,435
1983	1,595,000	2.4%	37,000	4,914	32,086	40,555	8,469
1984	1,622,000	1.7%	27,000	-2,793	29,793	38,643	8,850
1985	1,643,000	1.3%	21,000	-7,714	28,714	37,664	8,950
1986	1,663,000	1.2%	20,000	-8,408	28,408	37,309	8,901
1987	1,678,000	0.9%	15,000	-11,713	26,713	35,631	8,918
1988	1,690,000	0.7%	12,000	-14,557	26,557	35,809	9,252
1989	1,706,000	0.9%	16,000	-10,355	26,355	35,439	9,084
1990	1,729,227	1.4%	23,227	-3,480	26,707	35,830	9,123
1991	1,780,870	3.0%	51,643	24,878	26,765	36,194	9,429
1992	1,838,149	3.2%	57,279	30,042	27,237	36,796	9,559
1993	1,889,393	2.8%	51,244	24,561	26,700	36,755	10,055
1994	1,946,721	3.0%	57,328	30,116	27,209	37,619	10,410
1995	1,995,228	2.5%	48,507	20,024	28,496	39,077	10,581
1996	2,042,893	2.4%	47,665	18,171	29,500	40,501	11,001
1997	2,099,409	2.8%	56,516	25,253	31,303	42,548	11,245
1998	2,141,632	2.0%	42,223	9,745	32,423	44,268	11,845
1999	2,193,014	2.4%	51,382	17,584	33,867	45,648	11,781
2000	2,246,468	2.4%	53,454	18,527	34,927	46,880	11,953
2001	2,290,634	2.0%	44,166	8,915	35,251	47,688	12,437
2002	2,331,826	1.8%	41,192	5,813	35,379	48,041	12,662
2003	2,372,458	1.7%	40,632	3,912	36,720	49,518	12,798
2004	2,430,223	2.4%	57,765	20,520	37,245	50,527	13,282
2005	2,505,843	3.1%	75,620	38,108	37,512	50,431	12,919
2006	2,576,229	2.8%	70,386	31,376	39,010	52,368	13,358
2007	2,636,075	2.3%	59,846	19,673	40,173	53,953	13,780
2008	2,691,122	2.1%	55,047	13,470	41,577	55,357	13,780
2009	2,731,560	1.5%	40,438	-325	40,763	54,548	13,785
2010	2,772,371	1.5%	40,811	-1,641	38,597	52,899	14,302
2011	2,820,613	1.7%	48,242	11,300	36,939	51,836	14,897
2012	2,864,744	1.6%	44,132	9,032	35,099	50,388	15,289
2013	2,902,179	1.3%	37,434	1,550	35,885	51,801	15,916
2014	2,941,964	1.4%	39,785	4,919	34,866	50,807	15,941
2015	2,997,584	1.9%	55,620	21,671	33,950	51,024	17,074
2016	3,054,994	1.9%	57,410	24,261	33,149	50,704	17,555
2017	3,113,983	1.9%	58,989	27,091	31,898	49,494	17,596
2018	3,166,666	1.7%	52,683	23,200	29,483	47,628	18,145
2019	3,220,262	1.7%	53,596	24,987	28,609	46,990	18,381

Note: 1. In 1996, the Utah Population Estimates Committee changed the convention on rounded estimates so it published unrounded estimates. Accordingly, the revised estimates for 1990 and thereafter are not rounded.
2. The Utah Population Estimates Committee revised the population estimates for the years from 2000 to 2009 following the results of the 2010 Census.
3. Data in this table may differ from other tables due to different sources of data or rounding.
Source: 1980-2009: Utah Population Estimates Committee. 2010-2017: Utah Population Committee, Kem C. Gardner Policy Institute.

Table 1.2: Utah Population Projections by Components of Change

Year	July 1st Population	Percent Change	Increase	Net Migration	Natural Increase	Births	Deaths
2020	3,325,425	2.0%	64,661	35,816	28,845	55,563	19,747
2021	3,389,467	1.9%	64,042	38,388	25,654	56,226	17,839
2022	3,449,985	1.8%	60,518	38,447	22,071	56,884	18,437
2023	3,507,364	1.7%	57,379	38,505	18,874	57,534	19,029
2024	3,562,226	1.6%	54,861	38,586	16,275	58,201	19,615
2025	3,615,036	1.5%	52,811	38,696	14,115	58,897	20,201
2026	3,669,342	1.5%	54,306	38,833	15,473	59,623	20,790
2027	3,723,441	1.5%	54,099	39,049	15,051	60,430	21,381
2028	3,778,152	1.5%	54,711	39,275	15,436	61,262	21,987
2029	3,833,308	1.5%	55,155	39,507	15,648	62,122	22,614
2030	3,889,310	1.5%	56,003	39,724	16,278	62,984	23,260
2031	3,946,122	1.5%	56,811	39,905	16,906	63,831	23,925
2032	4,004,069	1.5%	57,948	40,046	17,902	64,657	24,611
2033	4,062,343	1.5%	58,273	40,131	18,143	65,449	25,319
2034	4,120,490	1.4%	58,148	40,129	18,019	66,169	26,040
2035	4,178,317	1.4%	57,826	40,036	17,790	66,807	26,771
2036	4,235,865	1.4%	57,548	39,853	17,695	67,362	27,509
2037	4,293,208	1.4%	57,344	39,575	17,768	67,827	28,252
2038	4,350,268	1.3%	57,060	39,223	17,837	68,218	28,995
2039	4,407,155	1.3%	56,887	38,819	18,068	68,555	29,736
2040	4,463,950	1.3%	56,795	38,385	18,411	68,856	30,472
2041	4,520,678	1.3%	56,728	37,937	18,791	69,138	31,201
2042	4,577,247	1.3%	56,569	37,510	19,059	69,432	31,922
2043	4,633,568	1.2%	56,321	37,123	19,198	69,755	32,632
2044	4,689,532	1.2%	55,965	36,772	19,192	70,100	33,328
2045	4,745,057	1.2%	55,525	36,475	19,049	70,478	34,003
2046	4,800,120	1.2%	55,062	36,239	18,823	70,893	34,654
2047	4,854,748	1.1%	54,628	36,062	18,566	71,349	35,287
2048	4,909,089	1.1%	54,341	35,937	18,405	71,845	35,909
2049	4,963,211	1.1%	54,122	35,885	18,236	72,392	36,506
2050	5,017,232	1.1%	54,022	35,903	18,119	72,985	37,082
2051	5,071,236	1.1%	54,004	35,981	18,023	73,623	37,642
2052	5,125,126	1.1%	53,890	36,113	17,777	74,307	38,194
2053	5,178,833	1.0%	53,707	36,291	17,416	75,031	38,741
2054	5,232,327	1.0%	53,495	36,500	16,994	75,785	39,284
2055	5,285,767	1.0%	53,439	36,730	16,710	76,557	39,828
2056	5,339,307	1.0%	53,540	36,966	16,574	77,343	40,377
2057	5,393,004	1.0%	53,696	37,201	16,496	78,139	40,938
2058	5,446,925	1.0%	53,921	37,414	16,507	78,933	41,518
2059	5,501,088	1.0%	54,163	37,595	16,569	79,717	42,123
2060	5,555,423	1.0%	54,335	37,730	16,605	80,485	42,755
2061	5,609,943	1.0%	54,519	37,809	16,711	81,229	43,421
2062	5,664,555	1.0%	54,613	37,825	16,787	81,944	44,119
2063	5,719,145	1.0%	54,590	37,774	16,816	82,624	44,850
2064	5,773,599	1.0%	54,454	37,650	16,804	83,266	45,617
2065	5,827,810	0.9%	54,210	37,452	16,758	83,868	46,416

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

Table 1.3: Utah Demographic Projections by Selected Age Group

	Total Population				School Age Population (5-17)			Working Age Population (18-64)			Retirement Age Population (65+)		
Year	Total	Absolute Growth	Growth Rate	Median Age	Total	Absolute Growth	Growth Rate	Total	Absolute Growth	Growth Rate	Total	Absolute Growth	Growth Rate
2020	3,325,425	64,661	2.0%	31.9	705,631	5,669	0.8%	1,957,722	35,916	1.9%	391,442	18,592	5.0%
2021	3,389,467	64,042	1.9%	32.2	708,542	2,911	0.4%	1,993,455	35,734	1.8%	411,593	20,151	5.1%
2022	3,449,985	60,518	1.8%	32.5	712,480	3,938	0.6%	2,027,389	33,934	1.7%	431,420	19,828	4.8%
2023	3,507,364	57,379	1.7%	32.8	715,336	2,856	0.4%	2,060,074	32,684	1.6%	450,715	19,295	4.5%
2024	3,562,226	54,861	1.6%	33.0	717,354	2,019	0.3%	2,091,879	31,805	1.5%	469,232	18,517	4.1%
2025	3,615,036	52,811	1.5%	33.3	718,210	856	0.1%	2,122,790	30,911	1.5%	487,659	18,427	3.9%
2026	3,669,342	54,306	1.5%	33.4	719,678	1,468	0.2%	2,155,321	32,531	1.5%	504,883	17,224	3.5%
2027	3,723,441	54,099	1.5%	33.6	721,751	2,073	0.3%	2,187,581	32,260	1.5%	521,321	16,438	3.3%
2028	3,778,152	54,711	1.5%	33.7	724,517	2,766	0.4%	2,220,156	32,575	1.5%	537,054	15,733	3.0%
2029	3,833,308	55,155	1.5%	33.8	729,200	4,683	0.6%	2,252,342	32,186	1.4%	551,460	14,406	2.7%
2030	3,889,310	56,003	1.5%	34.0	736,180	6,980	1.0%	2,284,097	31,755	1.4%	564,649	13,190	2.4%
2031	3,946,122	56,811	1.5%	34.1	742,719	6,540	0.9%	2,318,155	34,058	1.5%	576,640	11,991	2.1%
2032	4,004,069	57,948	1.5%	34.3	750,959	8,239	1.1%	2,351,322	33,167	1.4%	588,852	12,211	2.1%
2033	4,062,343	58,273	1.5%	34.4	759,942	8,983	1.2%	2,384,111	32,789	1.4%	601,095	12,244	2.1%
2034	4,120,490	58,148	1.4%	34.6	770,334	10,392	1.4%	2,414,778	30,667	1.3%	614,121	13,026	2.2%
2035	4,178,317	57,826	1.4%	34.8	779,026	8,692	1.1%	2,445,419	30,641	1.3%	628,814	14,693	2.4%
2036	4,235,865	57,548	1.4%	34.9	787,890	8,864	1.1%	2,475,620	30,201	1.2%	643,797	14,983	2.4%
2037	4,293,208	57,344	1.4%	35.1	797,104	9,214	1.2%	2,506,546	30,927	1.2%	657,890	14,093	2.2%
2038	4,350,268	57,060	1.3%	35.3	806,637	9,533	1.2%	2,537,729	31,183	1.2%	671,534	13,644	2.1%
2039	4,407,155	56,887	1.3%	35.5	816,444	9,807	1.2%	2,568,245	30,516	1.2%	685,764	14,229	2.1%
2040	4,463,950	56,795	1.3%	35.7	826,429	9,984	1.2%	2,597,226	28,981	1.1%	701,572	15,809	2.3%
2041	4,520,678	56,728	1.3%	35.8	836,467	10,039	1.2%	2,624,934	27,708	1.1%	718,784	17,212	2.5%
2042	4,577,247	56,569	1.3%	36.0	846,377	9,910	1.2%	2,650,884	25,950	1.0%	737,883	19,099	2.7%
2043	4,633,568	56,321	1.2%	36.2	855,987	9,610	1.1%	2,675,796	24,912	0.9%	758,145	20,261	2.7%
2044	4,689,532	55,965	1.2%	36.4	865,150	9,163	1.1%	2,700,610	24,814	0.9%	778,604	20,459	2.7%
2045	4,745,057	55,525	1.2%	36.6	873,751	8,601	1.0%	2,724,245	23,634	0.9%	800,316	21,712	2.8%
2046	4,800,120	55,062	1.2%	36.8	881,707	7,956	0.9%	2,748,346	24,101	0.9%	821,637	21,321	2.7%
2047	4,854,748	54,628	1.1%	36.9	888,990	7,283	0.8%	2,772,936	24,590	0.9%	842,566	20,929	2.5%
2048	4,909,089	54,341	1.1%	37.1	895,633	6,643	0.7%	2,798,125	25,189	0.9%	863,081	20,515	2.4%
2049	4,963,211	54,122	1.1%	37.2	901,673	6,040	0.7%	2,824,301	26,176	0.9%	882,794	19,713	2.3%
2050	5,017,232	54,022	1.1%	37.3	907,179	5,506	0.6%	2,849,739	25,438	0.9%	903,462	20,668	2.3%
2051	5,071,236	54,004	1.1%	37.4	912,247	5,068	0.6%	2,875,047	25,308	0.9%	924,451	20,990	2.3%
2052	5,125,126	53,890	1.1%	37.4	916,968	4,722	0.5%	2,900,854	25,807	0.9%	944,955	20,504	2.2%
2053	5,178,833	53,707	1.0%	37.5	921,447	4,479	0.5%	2,927,033	26,180	0.9%	964,935	19,980	2.1%
2054	5,232,327	53,495	1.0%	37.6	925,810	4,363	0.5%	2,952,816	25,783	0.9%	985,028	20,092	2.1%
2055	5,285,767	53,439	1.0%	37.7	930,229	4,419	0.5%	2,976,951	24,135	0.8%	1,006,482	21,454	2.2%
2056	5,339,307	53,540	1.0%	37.7	934,856	4,627	0.5%	2,999,376	22,424	0.8%	1,029,384	22,902	2.3%
2057	5,393,004	53,696	1.0%	37.8	939,808	4,952	0.5%	3,025,642	26,266	0.9%	1,048,149	18,765	1.8%
2058	5,446,925	53,921	1.0%	37.9	945,186	5,378	0.6%	3,054,385	28,744	1.0%	1,064,146	15,997	1.5%
2059	5,501,088	54,163	1.0%	38.0	951,062	5,876	0.6%	3,084,598	30,213	1.0%	1,078,369	14,224	1.3%
2060	5,555,423	54,335	1.0%	38.0	957,453	6,392	0.7%	3,115,001	30,403	1.0%	1,092,054	13,685	1.3%
2061	5,609,943	54,519	1.0%	38.1	964,370	6,917	0.7%	3,142,583	27,582	0.9%	1,108,251	16,197	1.5%
2062	5,664,555	54,613	1.0%	38.1	971,800	7,430	0.8%	3,167,041	24,459	0.8%	1,127,225	18,975	1.7%
2063	5,719,145	54,590	1.0%	38.2	979,706	7,906	0.8%	3,192,733	25,692	0.8%	1,144,582	17,356	1.5%
2064	5,773,599	54,454	1.0%	38.3	988,034	8,328	0.9%	3,217,796	25,063	0.8%	1,162,154	17,572	1.5%
2065	5,827,810	54,210	0.9%	38.3	996,717	8,683	0.9%	3,241,337	23,542	0.7%	1,180,818	18,664	1.6%

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

Table 1.4: Utah Population Estimates by County

	Census	UPC Estimates										2018 - 2019		2019
	April 1, 2010	July 1, 2010	July 1, 2011	July 1, 2012	July 1, 2013	July 1, 2014	July 1, 2015	July 1, 2016	July 1, 2017	July 1, 2018	July 1, 2019	Absolute Change	Percent Change	% of Total Population
Beaver	6,629	6,643	6,658	6,670	6,754	6,661	6,710	6,782	6,843	6,910	6,976	66	1.0%	0.2%
Box Elder	49,975	50,067	50,640	51,155	51,795	52,282	52,971	54,040	54,971	55,685	56,329	643	1.2%	1.7%
Cache	112,656	113,307	115,004	116,404	117,600	118,876	121,873	123,926	126,490	128,887	131,387	2,500	1.9%	4.1%
Carbon	21,403	21,419	21,505	21,590	21,341	21,203	21,168	21,193	21,209	21,396	21,482	86	0.4%	0.7%
Daggett	1,059	1,078	1,109	1,114	1,157	1,113	1,114	1,104	1,052	1,061	1,073	12	1.1%	0.0%
Davis	306,479	307,625	313,280	318,477	324,410	329,842	336,106	342,658	348,763	352,805	356,964	4,159	1.2%	11.1%
Duchesne	18,607	18,721	19,020	19,696	20,283	20,577	20,822	20,609	20,828	20,850	20,846	-4	-0.0%	0.6%
Emery	10,976	11,012	11,128	10,964	10,945	10,845	10,662	10,577	10,672	10,669	10,666	-3	-0.0%	0.3%
Garfield	5,172	5,171	5,203	5,226	5,220	5,194	5,164	5,191	5,240	5,229	5,226	-3	-0.1%	0.2%
Grand	9,225	9,238	9,395	9,529	9,553	9,631	9,764	9,943	10,059	10,262	10,117	-145	-1.4%	0.3%
Iron	46,163	46,221	46,955	47,311	47,622	48,193	49,412	50,747	52,278	54,151	55,401	1,249	2.3%	1.7%
Juab	10,246	10,280	10,380	10,485	10,604	10,824	11,072	11,542	11,798	12,177	12,455	278	2.3%	0.4%
Kane	7,125	7,116	7,200	7,302	7,321	7,268	7,272	7,583	7,558	7,718	7,716	-2	-0.0%	0.2%
Millard	12,503	12,535	12,706	12,816	12,956	13,023	13,105	13,291	13,477	13,586	13,743	157	1.2%	0.4%
Morgan	9,469	9,518	9,714	10,049	10,418	10,776	11,081	11,522	11,725	11,963	12,189	226	1.9%	0.4%
Piute	1,556	1,555	1,576	1,585	1,603	1,594	1,632	1,604	1,607	1,663	1,711	49	2.9%	0.1%
Rich	2,264	2,278	2,291	2,277	2,300	2,324	2,355	2,357	2,371	2,428	2,398	-30	-1.2%	0.1%
Salt Lake	1,029,655	1,031,697	1,046,461	1,060,336	1,070,815	1,080,905	1,094,681	1,108,910	1,128,271	1,142,081	1,152,960	10,879	1.0%	35.8%
San Juan	14,746	14,771	15,037	15,448	15,578	15,782	15,919	16,324	16,333	16,490	16,680	190	1.2%	0.5%
Sanpete	27,822	27,907	28,351	28,485	28,632	28,705	29,089	29,490	30,032	30,578	31,003	425	1.4%	1.0%
Sevier	20,802	20,814	20,893	21,053	21,021	21,102	21,240	21,519	21,765	21,928	22,219	292	1.3%	0.7%
Summit	36,324	36,562	37,396	37,936	38,212	38,678	39,280	40,051	40,771	41,285	41,824	539	1.3%	1.3%
Tooele	58,218	58,358	59,151	60,131	61,367	62,184	63,266	65,290	67,133	68,858	70,889	2,031	3.0%	2.2%
Uintah	32,588	32,760	33,943	35,047	36,146	36,981	37,398	36,583	36,612	36,921	36,973	52	0.1%	1.1%
Utah	516,564	518,872	532,753	544,892	554,405	567,218	585,719	603,385	617,735	633,582	651,409	17,827	2.8%	20.2%
Wasatch	23,530	23,652	24,484	25,542	26,390	27,344	28,616	29,998	31,224	32,138	32,866	729	2.3%	1.0%
Washington	138,115	138,579	141,797	144,061	147,061	150,508	154,615	160,371	165,592	171,042	180,550	9,508	5.6%	5.6%
Wayne	2,778	2,782	2,766	2,773	2,748	2,740	2,725	2,719	2,738	2,752	2,754	2	0.1%	0.1%
Weber	231,236	231,833	233,819	236,391	237,921	239,588	242,753	245,687	248,835	251,571	253,455	1,884	0.7%	7.9%
MCD														
Bear River	164,895	165,652	167,935	169,836	171,695	173,482	177,200	180,323	183,832	187,001	190,114	3,113	1.7%	5.9%
Central	75,707	75,873	76,672	77,197	77,563	77,988	78,863	80,165	81,418	82,683	83,886	1,203	1.5%	2.6%
Mountainland	576,418	579,086	594,633	608,371	619,007	633,241	653,614	673,433	689,730	707,004	726,099	19,095	2.7%	22.5%
Southeastern	56,350	56,440	57,065	57,531	57,418	57,462	57,514	58,037	58,273	58,817	58,945	128	0.2%	1.8%
Southwestern	203,204	203,730	207,812	210,569	213,978	217,825	223,173	230,673	237,511	245,051	255,869	10,818	4.4%	7.9%
Uintah Basin	52,254	52,559	54,072	55,857	57,586	58,672	59,334	58,295	58,492	58,833	58,892	59	0.1%	1.8%
Wasatch Front	1,635,057	1,639,031	1,662,423	1,685,383	1,704,932	1,723,295	1,747,887	1,774,067	1,804,727	1,827,277	1,846,457	19,180	1.0%	57.3%
State of Utah	2,763,885	2,772,371	2,820,613	2,864,744	2,902,179	2,941,964	2,997,584	3,054,994	3,113,983	3,166,666	3,220,262	53,596	1.7%	100.0%

Note: The MCDs are multi-county districts and are divided as follows: Bear River MCD: Box Elder, Cache, and Rich counties; Central MCD: Juab, Millard, Piute, Sanpete, Sevier, and Wayne counties; Mountainland MCD: Summit, Utah, and Wasatch counties;Southeastern MCD: Carbon, Emery, Grand, and San Juan counties; Southwestern MCD: Beaver, Garfield, Iron, Kane and Washington counties; Uintah Basin MCD: Daggett, Duchesne, and Uintah counties; Wasatch Front MCD: Davis, Morgan, Salt Lake, Tooele, and Weber counties.
Source: U.S. Census Bureau (April 1, 2010). Utah Population Committee, Kem C. Gardner Policy Institute (2010-2019).

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

	April 1, 2010		July 1, 2018		July 1, 2019		2010-2019			2018-2019		
	Population	Rank	Population	Rank	Population	Rank	Absolute Change	Percent Change	% Change Rank	Absolute Change	Percent Change	% Change Rank
United States	308,745,538		326,687,501		328,239,523		19,493,985	6.3%		1,552,022	0.5%	
Region												
Northeast	55,317,240	4	56,046,620	4	55,982,803	4	665,563	1.2%	4	-63,817	-0.1%	4
Midwest	66,927,001	3	68,236,628	3	68,329,004	3	1,402,003	2.1%	3	92,376	0.1%	3
South	114,555,744	1	124,569,433	1	125,580,448	1	11,024,704	9.6%	1	1,011,015	0.8%	1
West	71,945,553	2	77,834,820	2	78,347,268	2	6,401,715	8.9%	2	512,448	0.7%	2
State												
Alabama	4,779,736	23	4,887,681	24	4,903,185	24	123,449	2.6%	34	15,504	0.3%	26
Alaska	710,231	47	735,139	48	731,545	48	21,314	3.0%	31	-3,594	-0.5%	50
Arizona	6,392,017	16	7,158,024	14	7,278,717	14	886,700	13.9%	8	120,693	1.7%	3
Arkansas	2,915,918	32	3,009,733	33	3,017,804	33	101,886	3.5%	29	8,071	0.3%	27
California	37,253,956	1	39,461,588	1	39,512,223	1	2,258,267	6.1%	21	50,635	0.1%	36
Colorado	5,029,196	22	5,691,287	21	5,758,736	21	729,540	14.5%	4	67,449	1.2%	8
Connecticut	3,574,097	29	3,571,520	29	3,565,287	29	-8,810	-0.2%	48	-6,233	-0.2%	45
Delaware	897,934	45	965,479	45	973,764	45	75,830	8.4%	16	8,285	0.9%	12
District of Columbia	601,723	50	701,547	49	705,749	49	104,026	17.3%	1	4,202	0.6%	17
Florida	18,801,310	4	21,244,317	3	21,477,737	3	2,676,427	14.2%	5	233,420	1.1%	9
Georgia	9,687,653	9	10,511,131	8	10,617,423	8	929,770	9.6%	14	106,292	1.0%	11
Hawaii	1,360,301	40	1,420,593	40	1,415,872	40	55,571	4.1%	26	-4,721	-0.3%	47
Idaho	1,567,582	39	1,750,536	39	1,787,065	39	219,483	14.0%	7	36,529	2.1%	1
Illinios	12,830,632	5	12,723,071	6	12,671,821	6	-158,811	-1.2%	50	-51,250	-0.4%	49
Indiana	6,483,802	15	6,695,497	17	6,732,219	17	248,417	3.8%	27	36,722	0.5%	19
Iowa	3,046,355	30	3,148,618	31	3,155,070	31	108,715	3.6%	28	6,452	0.2%	30
Kansas	2,853,118	33	2,911,359	35	2,913,314	35	60,196	2.1%	38	1,955	0.1%	39
Kentucky	4,339,367	26	4,461,153	26	4,467,673	26	128,306	3.0%	32	6,520	0.1%	34
Louisiana	4,533,372	25	4,659,690	25	4,648,794	25	115,422	2.5%	35	-10,896	-0.2%	46
Maine	1,328,361	41	1,339,057	42	1,344,212	42	15,851	1.2%	41	5,155	0.4%	25
Maryland	5,773,552	19	6,035,802	19	6,045,680	19	272,128	4.7%	25	9,878	0.2%	33
Massachusetts	6,547,629	14	6,882,635	15	6,892,503	15	344,874	5.3%	24	9,868	0.1%	35
Michigan	9,883,640	8	9,984,072	10	9,986,857	10	103,217	1.0%	42	2,785	0.0%	40
Minnesota	5,303,925	21	5,606,249	22	5,639,632	22	335,707	6.3%	20	33,383	0.6%	18
Mississippi	2,967,297	31	2,981,020	34	2,976,149	34	8,852	0.3%	47	-4,871	-0.2%	44
Missouri	5,988,927	18	6,121,623	18	6,137,428	18	148,501	2.5%	36	15,805	0.3%	29
Montana	989,415	44	1,060,665	43	1,068,778	43	79,363	8.0%	17	8,113	0.8%	15
Nebraska	1,826,341	38	1,925,614	37	1,934,408	37	108,067	5.9%	22	8,794	0.5%	22
Nevada	2,700,551	35	3,027,341	32	3,080,156	32	379,605	14.1%	6	52,815	1.7%	2
New Hampshire	1,316,470	42	1,353,465	41	1,359,711	41	43,241	3.3%	30	6,246	0.5%	21
New Jersey	8,791,894	11	8,886,025	11	8,882,190	11	90,296	1.0%	43	-3,835	-0.0%	42
New Mexico	2,059,179	36	2,092,741	36	2,096,829	36	37,650	1.8%	39	4,088	0.2%	32
New York	19,378,102	3	19,530,351	4	19,453,561	4	75,459	0.4%	46	-76,790	-0.4%	48
North Carolina	9,535,483	10	10,381,615	9	10,488,084	9	952,601	10.0%	13	106,469	1.0%	10
North Dakota	672,591	48	758,080	47	762,062	47	89,471	13.3%	9	3,982	0.5%	20
Ohio	11,536,504	7	11,676,341	7	11,689,100	7	152,596	1.3%	40	12,759	0.1%	37
Oklahoma	3,751,351	28	3,940,235	28	3,956,971	28	205,620	5.5%	23	16,736	0.4%	23
Oregon	3,831,074	27	4,181,886	27	4,217,737	27	386,663	10.1%	12	35,851	0.9%	13
Pennsylvania	12,702,379	6	12,800,922	5	12,801,989	5	99,610	0.8%	44	1,067	0.0%	41
Rhode Island	1,052,567	43	1,058,287	44	1,059,361	44	6,794	0.6%	45	1,074	0.1%	38
South Carolina	4,625,364	24	5,084,156	23	5,148,714	23	523,350	11.3%	11	64,558	1.3%	6
South Dakota	814,180	46	878,698	46	884,659	46	70,479	8.7%	15	5,961	0.7%	16
Tennessee	6,346,105	17	6,771,631	16	6,829,174	16	483,069	7.6%	18	57,543	0.8%	14
Texas	25,145,561	2	28,628,666	2	28,995,881	2	3,850,320	15.3%	3	367,215	1.3%	5
Utah	**2,763,885**	**34**	**3,153,550**	**30**	**3,205,958**	**30**	**442,073**	**16.0%**	**2**	**52,408**	**1.7%**	**4**
Vermont	625,741	49	624,358	50	623,989	50	-1,752	-0.3%	49	-369	-0.1%	43
Virginia	8,001,024	12	8,501,286	12	8,535,519	12	534,495	6.7%	19	34,233	0.4%	24
Washington	6,724,540	13	7,523,869	13	7,614,893	13	890,353	13.2%	10	91,024	1.2%	7
West Virginia	1,852,994	37	1,804,291	38	1,792,147	38	-60,847	-3.3%	51	-12,144	-0.7%	51
Wisconsin	5,686,986	20	5,807,406	20	5,822,434	20	135,448	2.4%	37	15,028	0.3%	28
Wyoming	563,626	51	577,601	51	578,759	51	15,133	2.7%	33	1,158	0.2%	31

Source: U.S. Census Bureau, Population Division, Vintage 2019 Estimates

Table 1.6: Rankings of States by Selected Age Groups as a Percent of Total Population: July 1, 2018

	All Ages		Under Age 5			Ages 5 to 17		
Rank	**State**	**Population**	**State**	**Population**	**Percent of Total**	**State**	**Population**	**Percent of Total**
	United States	327,167,434	United States	19,810,275	6.1%	United States	53,589,067	16.4%
1	California	39,557,045	**Utah**	**253,004**	**8.0%**	**Utah**	**679,458**	**21.5%**
2	Texas	28,701,845	Alaska	53,115	7.2%	Idaho	330,633	18.8%
3	Florida	21,299,325	North Dakota	54,695	7.2%	Texas	5,373,973	18.7%
4	New York	19,542,209	Texas	2,024,126	7.1%	Nebraska	343,873	17.8%
5	Pennsylvania	12,807,060	South Dakota	62,132	7.0%	Kansas	516,626	17.7%
6	Illinois	12,741,080	Nebraska	132,968	6.9%	Alaska	130,701	17.7%
7	Ohio	11,689,442	Idaho	116,339	6.6%	Oklahoma	696,057	17.7%
8	Georgia	10,519,475	Oklahoma	260,429	6.6%	South Dakota	155,474	17.6%
9	North Carolina	10,383,620	Louisiana	307,019	6.6%	Georgia	1,848,337	17.6%
10	Michigan	9,995,915	Kansas	189,335	6.5%	Mississippi	520,664	17.4%
11	New Jersey	8,908,520	District of Columbia	45,617	6.5%	Indiana	1,149,586	17.2%
12	Virginia	8,517,685	Minnesota	355,291	6.3%	Wyoming	98,863	17.1%
13	Washington	7,535,591	Arkansas	190,343	6.3%	New Mexico	357,907	17.1%
14	Arizona	7,171,646	Iowa	198,218	6.3%	Arkansas	512,837	17.0%
15	Massachusetts	6,902,149	Indiana	418,544	6.3%	Louisiana	788,897	16.9%
16	Tennessee	6,770,010	Georgia	657,414	6.2%	Minnesota	947,324	16.9%
17	Indiana	6,691,878	Wyoming	35,912	6.2%	Iowa	532,549	16.9%
18	Missouri	6,126,452	Mississippi	185,477	6.2%	Arizona	1,206,721	16.8%
19	Maryland	6,042,718	Hawaii	87,704	6.2%	Nevada	503,002	16.6%
20	Wisconsin	5,813,568	California	2,441,300	6.2%	California	6,548,655	16.6%
21	Colorado	5,695,564	Kentucky	275,412	6.2%	Illinois	2,096,647	16.5%
22	Minnesota	5,611,179	Washington	462,701	6.1%	Kentucky	733,417	16.4%
23	South Carolina	5,084,127	Nevada	185,995	6.1%	Missouri	1,004,117	16.4%
24	Alabama	4,887,871	Missouri	372,713	6.1%	North Dakota	124,003	16.3%
25	Louisiana	4,659,978	Arizona	435,936	6.1%	Colorado	928,381	16.3%
26	Kentucky	4,468,402	Maryland	364,504	6.0%	Alabama	796,637	16.3%
27	Oregon	4,190,713	Tennessee	406,574	6.0%	North Carolina	1,690,517	16.3%
28	Oklahoma	3,943,079	Alabama	293,203	6.0%	Tennessee	1,099,646	16.2%
29	Connecticut	3,572,665	Virginia	510,924	6.0%	Ohio	1,898,536	16.2%
30	**Utah**	**3,161,105**	Illinois	760,619	6.0%	Wisconsin	941,721	16.2%
31	Iowa	3,156,145	Ohio	694,789	5.9%	Maryland	975,644	16.1%
32	Nevada	3,034,392	New Mexico	124,246	5.9%	New Jersey	1,435,015	16.1%
33	Arkansas	3,013,825	Colorado	336,854	5.9%	South Carolina	813,554	16.0%
34	Mississippi	2,986,530	Montana	62,536	5.9%	Virginia	1,358,868	16.0%
35	Kansas	2,911,505	North Carolina	610,128	5.9%	Washington	1,200,584	15.9%
36	New Mexico	2,095,428	New York	1,140,442	5.8%	Michigan	1,592,505	15.9%
37	Nebraska	1,929,268	New Jersey	518,628	5.8%	Montana	166,898	15.7%
38	West Virginia	1,805,832	Wisconsin	334,382	5.8%	Connecticut	552,059	15.5%
39	Idaho	1,754,208	South Carolina	292,391	5.8%	Delaware	148,805	15.4%
40	Hawaii	1,420,491	Michigan	572,163	5.7%	Oregon	639,353	15.3%
41	New Hampshire	1,356,458	Delaware	54,811	5.7%	Pennsylvania	1,945,914	15.2%
42	Maine	1,338,404	Oregon	234,214	5.6%	Hawaii	215,710	15.2%
43	Montana	1,062,305	Pennsylvania	702,997	5.5%	New York	2,927,660	15.0%
44	Rhode Island	1,057,315	Florida	1,143,183	5.4%	West Virginia	268,903	14.9%
45	Delaware	967,171	West Virginia	95,257	5.3%	Massachusetts	1,006,697	14.6%
46	South Dakota	882,235	Massachusetts	360,161	5.2%	Florida	3,085,898	14.5%
47	North Dakota	760,077	Rhode Island	54,413	5.1%	New Hampshire	194,150	14.3%
48	Alaska	737,438	Connecticut	183,134	5.1%	Rhode Island	150,800	14.3%
49	District of Columbia	702,455	Maine	64,282	4.8%	Maine	186,122	13.9%
50	Vermont	626,299	Vermont	29,681	4.7%	Vermont	86,292	13.8%
51	Wyoming	577,737	New Hampshire	64,020	4.7%	District of Columbia	81,877	11.7%

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

Table 1.6: Rankings of States by Selected Age Groups as a Percent of Total Population: July 1, 2018

(continued)

	Ages 18 to 64			Ages 65+				
Rank	State	Population	Percent of Total	State	Population	Percent of Total	State	Median Age
	United States	201,336,899	61.5%	United States	52,431,193	16.0%	United States	38.2
1	District of Columbia	489,658	69.7%	Maine	275,999	20.6%	Maine	44.9
2	Massachusetts	4,396,191	63.7%	Florida	4,358,071	20.5%	New Hampshire	43.0
3	Colorado	3,622,100	63.6%	West Virginia	359,878	19.9%	Vermont	42.8
4	Rhode Island	669,848	63.4%	Vermont	121,207	19.4%	West Virginia	42.7
5	Alaska	466,611	63.3%	Montana	198,902	18.7%	Florida	42.2
6	California	24,898,065	62.9%	Delaware	181,086	18.7%	Connecticut	41.0
7	New Hampshire	852,643	62.9%	Hawaii	260,967	18.4%	Pennsylvania	40.8
8	New York	12,260,573	62.7%	Pennsylvania	2,335,630	18.2%	Delaware	40.7
9	Virginia	5,332,492	62.6%	New Hampshire	245,645	18.1%	Rhode Island	40.1
10	Washington	4,708,074	62.5%	South Carolina	899,915	17.7%	New Jersey	40.0
11	Maryland	3,771,434	62.4%	Oregon	738,691	17.6%	Montana	39.9
12	Georgia	6,553,315	62.3%	Arizona	1,258,250	17.5%	Michigan	39.8
13	Connecticut	2,222,351	62.2%	New Mexico	366,189	17.5%	South Carolina	39.6
14	Vermont	389,119	62.1%	Rhode Island	182,254	17.2%	Wisconsin	39.6
15	Illinois	7,890,853	61.9%	Connecticut	615,121	17.2%	Massachusetts	39.4
16	New Jersey	5,516,350	61.9%	Michigan	1,716,604	17.2%	Ohio	39.4
17	Texas	17,701,426	61.7%	Iowa	539,830	17.1%	Oregon	39.4
18	Nevada	1,869,214	61.6%	Ohio	1,995,022	17.1%	Alabama	39.2
19	North Carolina	6,393,710	61.6%	Arkansas	511,827	17.0%	Hawaii	39.2
20	Oregon	2,578,455	61.5%	Wisconsin	985,473	17.0%	New York	39.0
21	Tennessee	4,154,093	61.4%	Alabama	826,894	16.9%	Kentucky	38.9
22	Michigan	6,114,643	61.2%	Missouri	1,033,964	16.9%	North Carolina	38.9
23	North Dakota	464,742	61.1%	South Dakota	146,854	16.6%	Maryland	38.8
24	Wisconsin	3,551,992	61.1%	Wyoming	95,375	16.5%	Tennessee	38.8
25	Pennsylvania	7,822,519	61.1%	Massachusetts	1,139,100	16.5%	Missouri	38.7
26	Kentucky	2,728,947	61.1%	New York	3,213,534	16.4%	Virginia	38.4
27	Louisiana	2,845,629	61.1%	Tennessee	1,109,697	16.4%	Arkansas	38.3
28	Minnesota	3,418,762	60.9%	Kentucky	730,626	16.4%	Illinois	38.3
29	Indiana	4,068,727	60.8%	North Carolina	1,689,265	16.3%	Iowa	38.2
30	Alabama	2,971,137	60.8%	New Jersey	1,438,527	16.1%	Minnesota	38.1
31	Ohio	7,101,095	60.7%	Mississippi	474,475	15.9%	Nevada	38.1
32	Maine	812,001	60.7%	Kansas	462,241	15.9%	New Mexico	38.1
33	Missouri	3,715,658	60.6%	Idaho	278,282	15.9%	Wyoming	38.0
34	South Carolina	3,078,267	60.5%	Minnesota	889,802	15.9%	Arizona	37.9
35	Mississippi	1,805,914	60.5%	Indiana	1,055,021	15.8%	Indiana	37.9
36	Hawaii	856,110	60.3%	Nebraska	303,666	15.7%	Mississippi	37.7
37	Delaware	582,469	60.2%	Oklahoma	619,553	15.7%	Washington	37.7
38	Wyoming	347,587	60.2%	Nevada	476,181	15.7%	Louisiana	37.2
39	Oklahoma	2,367,040	60.0%	Illinois	1,992,961	15.6%	South Dakota	37.1
40	West Virginia	1,081,794	59.9%	Washington	1,164,232	15.4%	Colorado	36.9
41	Kansas	1,743,303	59.9%	Virginia	1,315,401	15.4%	Georgia	36.9
42	Iowa	1,885,548	59.7%	Louisiana	718,433	15.4%	Kansas	36.9
43	Arkansas	1,798,818	59.7%	Maryland	931,136	15.4%	California	36.8
44	Florida	12,712,173	59.7%	North Dakota	116,637	15.3%	Oklahoma	36.7
45	Montana	633,969	59.7%	California	5,669,025	14.3%	Idaho	36.6
46	Arizona	4,270,739	59.6%	Colorado	808,229	14.2%	Nebraska	36.6
47	Nebraska	1,148,761	59.5%	Georgia	1,460,409	13.9%	North Dakota	35.2
48	New Mexico	1,247,086	59.5%	Texas	3,602,320	12.6%	Texas	34.8
49	**Utah**	**1,878,165**	59.4%	District of Columbia	85,303	12.1%	Alaska	34.6
50	South Dakota	517,775	58.7%	Alaska	87,011	11.8%	District of Columbia	34.0
51	Idaho	1,028,954	58.7%	**Utah**	**350,478**	**11.1%**	**Utah**	**31.0**

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

Table 1.7: Dependency Ratios by State: July 1, 2018

Rank	Preschool-Age (Under Age 5) per 100 of Working Age		School-Age (5-17) per 100 of Working Age		Retirement-Age (65 & Over) per 100 of Working Age		Total Non-Working Age per 100 of Working Age	
	United States	9.8	United States	26.6	United States	26.0	United States	62.5
1	**Utah**	**13.5**	**Utah**	**36.2**	Florida	34.3	Idaho	70.5
2	South Dakota	12.0	Idaho	32.1	Maine	34.0	South Dakota	70.4
3	North Dakota	11.8	Texas	30.4	West Virginia	33.3	**Utah**	**68.3**
4	Nebraska	11.6	South Dakota	30.0	Montana	31.4	New Mexico	68.0
5	Texas	11.4	Nebraska	29.9	Vermont	31.1	Nebraska	67.9
6	Alaska	11.4	Kansas	29.6	Delaware	31.1	Arizona	67.9
7	Idaho	11.3	Oklahoma	29.4	Hawaii	30.5	Montana	67.6
8	Oklahoma	11.0	Mississippi	28.8	Pennsylvania	29.9	Florida	67.6
9	Kansas	10.9	New Mexico	28.7	Arizona	29.5	Arkansas	67.5
10	Louisiana	10.8	Arkansas	28.5	New Mexico	29.4	Iowa	67.4
11	Arkansas	10.6	Wyoming	28.4	South Carolina	29.2	Kansas	67.0
12	Iowa	10.5	Arizona	28.3	New Hampshire	28.8	West Virginia	66.9
13	Minnesota	10.4	Indiana	28.3	Oregon	28.6	Oklahoma	66.6
14	Wyoming	10.3	Iowa	28.2	Iowa	28.6	Wyoming	66.2
15	Indiana	10.3	Georgia	28.2	Arkansas	28.5	Delaware	66.0
16	Mississippi	10.3	Alaska	28.0	South Dakota	28.4	Hawaii	65.9
17	Hawaii	10.2	Louisiana	27.7	Ohio	28.1	Mississippi	65.4
18	Arizona	10.2	Minnesota	27.7	Michigan	28.1	South Carolina	65.2
19	Kentucky	10.1	Missouri	27.0	Alabama	27.8	Missouri	64.9
20	Georgia	10.0	Nevada	26.9	Missouri	27.8	Maine	64.8
21	Missouri	10.0	Kentucky	26.9	Wisconsin	27.7	Ohio	64.6
22	New Mexico	10.0	Alabama	26.8	Connecticut	27.7	Alabama	64.5
23	Nevada	10.0	Ohio	26.7	Wyoming	27.4	Indiana	64.5
24	Alabama	9.9	North Dakota	26.7	Rhode Island	27.2	Minnesota	64.1
25	Montana	9.9	Illinois	26.6	Idaho	27.0	Louisiana	63.8
26	Washington	9.8	Wisconsin	26.5	Kentucky	26.8	Kentucky	63.7
27	California	9.8	Tennessee	26.5	Tennessee	26.7	Pennsylvania	63.7
28	Tennessee	9.8	North Carolina	26.4	Kansas	26.5	Wisconsin	63.7
29	Ohio	9.8	South Carolina	26.4	Nebraska	26.4	North Dakota	63.5
30	Maryland	9.7	Montana	26.3	North Carolina	26.4	Michigan	63.5
31	Illinois	9.6	California	26.3	Mississippi	26.3	Tennessee	63.0
32	Virginia	9.6	Michigan	26.0	New York	26.2	Oregon	62.5
33	North Carolina	9.5	New Jersey	26.0	Oklahoma	26.2	North Carolina	62.4
34	South Carolina	9.5	Maryland	25.9	New Jersey	26.1	Nevada	62.3
35	Wisconsin	9.4	Colorado	25.6	Minnesota	26.0	Texas	62.1
36	Delaware	9.4	Delaware	25.5	Indiana	25.9	New Jersey	61.5
37	New Jersey	9.4	Washington	25.5	Massachusetts	25.9	Illinois	61.5
38	Michigan	9.4	Virginia	25.5	Nevada	25.5	Vermont	61.0
39	District of Columbia	9.3	Hawaii	25.2	Illinois	25.3	Connecticut	60.8
40	New York	9.3	Pennsylvania	24.9	Louisiana	25.2	Georgia	60.5
41	Colorado	9.3	West Virginia	24.9	North Dakota	25.1	Maryland	60.2
42	Oregon	9.1	Connecticut	24.8	Washington	24.7	Washington	60.1
43	Florida	9.0	Oregon	24.8	Maryland	24.7	Virginia	59.7
44	Pennsylvania	9.0	Florida	24.3	Virginia	24.7	New York	59.4
45	West Virginia	8.8	New York	23.9	California	22.8	New Hampshire	59.1
46	Connecticut	8.2	Maine	22.9	Colorado	22.3	California	58.9
47	Massachusetts	8.2	Massachusetts	22.9	Georgia	22.3	Alaska	58.0
48	Rhode Island	8.1	New Hampshire	22.8	Texas	20.4	Rhode Island	57.8
49	Maine	7.9	Rhode Island	22.5	**Utah**	**18.7**	Colorado	57.2
50	Vermont	7.6	Vermont	22.2	Alaska	18.6	Massachusetts	57.0
51	New Hampshire	7.5	District of Columbia	16.7	District of Columbia	17.4	District of Columbia	43.5

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

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

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

Source: National Center for Health Statistics

Table 1.9: Components of Population Change Annual Rates: July 1, 2018 to July 1, 2019

Rank	Rate per 1,000 people									
	Total Population		Births		Deaths		Naural Increase		Net Migration	
	State	Rate	State	Rate	State	Rate	State	Rate	State	Rate
	United States	4.7	United States	11.6	United States	8.7	United States	2.9	United States	1.8
1	Idaho	20.7	**Utah**	**15.3**	West Virginia	12.5	**Utah**	**9.8**	Idaho	15.6
2	Nevada	17.3	North Dakota	13.9	Alabama	11.0	Alaska	7.1	Nevada	13.8
3	Arizona	16.7	Alaska	13.7	Maine	10.7	Texas	6.1	Arizona	13.7
4	**Utah**	**16.5**	South Dakota	13.5	Mississippi	10.6	North Dakota	5.6	South Carolina	11.5
5	Texas	12.7	District of Columbia	13.5	Pennsylvania	10.4	District of Columbia	5.4	Florida	10.4
6	South Carolina	12.6	Texas	13.1	Arkansas	10.4	South Dakota	5.2	Washington	8.1
7	Washington	12.0	Nebraska	13.1	Kentucky	10.3	Nebraska	5.1	North Carolina	7.8
8	Colorado	11.8	Louisiana	12.6	Oklahoma	10.2	Idaho	5.0	Colorado	7.3
9	Florida	10.9	Idaho	12.6	Ohio	10.1	California	4.6	Delaware	7.3
10	North Carolina	10.2	Oklahoma	12.3	Tennessee	10.0	Colorado	4.4	Oregon	6.9
11	Georgia	10.1	Kansas	12.2	Louisiana	10.0	Minnesota	4.3	Tennessee	6.7
12	Delaware	8.5	Arkansas	12.2	South Carolina	9.9	Georgia	3.9	**Utah**	**6.7**
13	Oregon	8.5	Georgia	12.1	Florida	9.9	Washington	3.9	Texas	6.6
14	Tennessee	8.5	Mississippi	12.1	Missouri	9.8	Kansas	3.5	Georgia	6.1
15	Montana	7.6	Minnesota	12.0	Delaware	9.8	Nevada	3.4	Montana	6.0
16	South Dakota	6.8	Indiana	12.0	Michigan	9.6	Virginia	3.4	Maine	5.6
17	District of Columbia	6.0	Kentucky	12.0	Montana	9.3	Maryland	3.1	New Hampshire	4.7
18	Minnesota	5.9	Iowa	12.0	Indiana	9.3	New York	3.0	Indiana	2.7
19	Indiana	5.5	Hawaii	11.9	Rhode Island	9.3	Arizona	3.0	Alabama	2.5
20	North Dakota	5.2	Tennessee	11.8	Iowa	9.1	Hawaii	2.9	Oklahoma	2.1
21	New Hampshire	4.6	Nevada	11.8	North Carolina	9.0	Wyoming	2.8	Minnesota	1.6
22	Nebraska	4.6	California	11.7	Vermont	9.0	Iowa	2.8	South Dakota	1.6
23	Oklahoma	4.2	Alabama	11.7	Hawaii	9.0	Indiana	2.8	Arkansas	0.9
24	Virginia	4.0	Missouri	11.6	New Hampshire	8.9	Illinois	2.7	Missouri	0.8
25	Maine	3.8	Washington	11.6	New Mexico	8.8	New Jersey	2.7	Virginia	0.7
26	Alabama	3.2	Maryland	11.6	Connecticut	8.7	Louisiana	2.6	District of Columbia	0.6
27	Arkansas	2.7	Virginia	11.6	Oregon	8.7	North Carolina	2.4	Rhode Island	0.4
28	Wisconsin	2.6	Ohio	11.5	Wisconsin	8.7	Wisconsin	2.3	Wisconsin	0.3
29	Missouri	2.6	New York	11.4	Illinois	8.7	New Mexico	2.3	Pennsylvania	-0.0
30	Iowa	2.0	North Carolina	11.4	Kansas	8.7	Oklahoma	2.2	Kentucky	-0.2
31	Wyoming	2.0	Wyoming	11.4	Wyoming	8.6	Missouri	1.8	Massachusetts	-0.3
32	New Mexico	2.0	Illinois	11.4	New Jersey	8.5	Tennessee	1.8	New Mexico	-0.3
33	Maryland	1.6	Arizona	11.4	Maryland	8.5	Arkansas	1.8	Ohio	-0.3
34	Kentucky	1.5	Colorado	11.3	Massachusetts	8.5	Massachusetts	1.7	North Dakota	-0.4
35	Massachusetts	1.4	New Jersey	11.2	New York	8.5	Kentucky	1.7	Vermont	-0.5
36	California	1.3	New Mexico	11.0	Nevada	8.4	Montana	1.6	Nebraska	-0.5
37	Ohio	1.1	Delaware	11.0	Arizona	8.4	Oregon	1.6	Iowa	-0.7
38	Rhode Island	1.0	South Carolina	11.0	South Dakota	8.3	Mississippi	1.5	Wyoming	-0.8
39	Kansas	0.7	Michigan	11.0	North Dakota	8.2	Ohio	1.4	Michigan	-1.1
40	Michigan	0.3	Wisconsin	11.0	Virginia	8.2	Michigan	1.4	Maryland	-1.4
41	Pennsylvania	0.1	Montana	10.9	Georgia	8.2	Delaware	1.3	Connecticut	-2.7
42	New Jersey	-0.4	Pennsylvania	10.6	Nebraska	8.1	South Carolina	1.1	Kansas	-2.8
43	Vermont	-0.6	Florida	10.4	District of Columbia	8.1	Connecticut	1.0	New Jersey	-3.1
44	Mississippi	-1.6	Oregon	10.3	Washington	7.7	Alabama	0.7	Mississippi	-3.1
45	Connecticut	-1.7	Massachusetts	10.2	Minnesota	7.7	Rhode Island	0.6	California	-3.3
46	Louisiana	-2.3	West Virginia	9.9	Idaho	7.5	Florida	0.5	West Virginia	-4.1
47	Hawaii	-3.3	Rhode Island	9.9	California	7.2	Pennsylvania	0.1	Louisiana	-4.9
48	New York	-3.9	Connecticut	9.7	Texas	7.0	Vermont	-0.1	Hawaii	-6.2
49	Illinois	-4.0	Maine	9.0	Colorado	6.8	New Hampshire	-0.1	Illinois	-6.8
50	Alaska	-4.9	Vermont	8.9	Alaska	6.6	Maine	-1.7	New York	-6.9
51	West Virginia	-6.8	New Hampshire	8.8	**Utah**	**5.5**	West Virginia	-2.6	Alaska	-12.0

Note : Rank is high to low. When states share the same rank, the next lower rank is omitted. Total population change includes a residual. This residual represents the change in population that cannot be attributed to any specific demographic component. Data in this table may differ from other tables due to different sources of data.
Dash (-) represents zero or rounds to zero.
Source: U.S. Census Bureau, Population Division, Vintage 2019 Estimates

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

	2010				2018				2010 to 2018 Percent Change	
	Total Housing Units	Total Households	Persons Per Household	Rank of HH size	Total Housing Units	Total Households	Persons Per Household	Rank of HH size	Total Housing Units	Total Households
United States	131,704,730	116,716,292	2.58	-	138,537,078	121,520,180	2.63	-	5.2%	4.1%
Alabama	2,171,853	1,883,791	2.48	27	2,274,565	1,855,184	2.57	32	4.7%	-1.5%
Alaska	306,967	258,058	2.65	7	318,336	254,551	2.79	47	3.7%	-1.4%
Arizona	2,844,526	2,380,990	2.63	9	3,035,669	2,614,298	2.68	43	6.7%	9.8%
Arkansas	1,316,299	1,147,084	2.47	33	1,380,504	1,156,347	2.53	25	4.9%	0.8%
California	13,680,081	12,577,498	2.90	2	14,277,157	13,072,122	2.96	49	4.4%	3.9%
Colorado	2,212,898	1,972,868	2.49	22	2,424,051	2,176,757	2.56	29	9.5%	10.3%
Connecticut	1,487,891	1,371,087	2.52	19	1,521,117	1,378,091	2.51	23	2.2%	0.5%
Delaware	405,885	342,297	2.55	15	438,693	367,671	2.56	29	8.1%	7.4%
District of Columbia	296,719	266,707	2.11	51	319,531	287,476	2.31	4	7.7%	7.8%
Florida	8,989,580	7,420,802	2.48	27	9,547,305	7,809,358	2.67	42	6.2%	5.2%
Georgia	4,088,801	3,585,584	2.63	9	4,326,105	3,803,012	2.70	46	5.8%	6.1%
Hawaii	519,508	455,338	2.89	3	546,213	455,309	3.02	50	5.1%	-0.0%
Idaho	667,796	579,408	2.66	6	735,672	640,270	2.69	44	10.2%	10.5%
Illinois	5,296,715	4,836,972	2.59	12	5,376,064	4,864,864	2.56	29	1.5%	0.6%
Indiana	2,795,541	2,502,154	2.52	19	2,903,554	2,599,169	2.50	17	3.9%	3.9%
Iowa	1,336,417	1,221,576	2.41	45	1,409,650	1,267,873	2.41	8	5.5%	3.8%
Kansas	1,233,215	1,112,096	2.49	22	1,280,774	1,133,408	2.50	17	3.9%	1.9%
Kentucky	1,927,164	1,719,965	2.45	37	1,995,182	1,732,713	2.50	17	3.5%	0.7%
Louisiana	1,964,981	1,728,360	2.55	15	2,076,028	1,737,220	2.61	37	5.7%	0.5%
Maine	721,830	557,219	2.32	49	746,596	570,307	2.28	1	3.4%	2.3%
Maryland	2,378,814	2,156,411	2.61	11	2,458,801	2,215,935	2.66	41	3.4%	2.8%
Massachusetts	2,808,254	2,547,075	2.48	27	2,914,929	2,624,294	2.54	26	3.8%	3.0%
Michigan	4,532,233	3,872,508	2.49	22	4,614,380	3,957,466	2.47	15	1.8%	2.2%
Minnesota	2,347,201	2,087,227	2.48	27	2,456,064	2,194,452	2.50	17	4.6%	5.1%
Mississippi	1,274,719	1,115,768	2.58	13	1,332,577	1,108,630	2.61	37	4.5%	-0.6%
Missouri	2,712,729	2,375,611	2.45	37	2,806,371	2,434,806	2.44	10	3.5%	2.5%
Montana	482,825	409,607	2.35	47	515,175	431,421	2.40	7	6.7%	5.3%
Nebraska	796,793	721,130	2.46	35	845,042	765,490	2.45	12	6.1%	6.2%
Nevada	1,173,814	1,006,250	2.65	7	1,268,633	1,129,810	2.65	40	8.1%	12.3%
New Hampshire	614,754	518,973	2.46	35	638,091	531,212	2.47	15	3.8%	2.4%
New Jersey	3,553,562	3,214,360	2.68	5	3,628,302	3,249,567	2.69	44	2.1%	1.1%
New Mexico	901,388	791,395	2.55	15	943,208	794,093	2.58	35	4.6%	0.3%
New York	8,108,103	7,317,755	2.57	14	8,363,934	7,367,015	2.57	32	3.2%	0.7%
North Carolina	4,327,528	3,745,155	2.48	27	4,684,876	4,011,462	2.52	24	8.3%	7.1%
North Dakota	317,498	281,192	2.30	50	377,649	319,355	2.30	2	18.9%	13.6%
Ohio	5,127,508	4,603,435	2.44	40	5,217,423	4,685,447	2.43	9	1.8%	1.8%
Oklahoma	1,664,378	1,460,450	2.49	22	1,743,069	1,485,310	2.58	35	4.7%	1.7%
Oregon	1,675,562	1,518,938	2.47	33	1,788,681	1,639,970	2.50	17	6.8%	8.0%
Pennsylvania	5,567,315	5,018,904	2.45	37	5,713,150	5,070,931	2.44	10	2.6%	1.0%
Rhode Island	463,388	413,600	2.44	40	469,157	406,573	2.50	17	1.2%	-1.7%
South Carolina	2,137,683	1,801,181	2.49	22	2,318,271	1,927,991	2.57	32	8.4%	7.0%
South Dakota	363,438	322,282	2.42	43	397,526	345,449	2.46	14	9.4%	7.2%
Tennessee	2,812,133	2,493,552	2.48	27	2,992,279	2,603,140	2.54	26	6.4%	4.4%
Texas	9,977,436	8,922,933	2.75	4	11,100,779	9,776,083	2.87	48	11.3%	9.6%
Utah	**979,709**	**877,692**	**3.10**	**1**	**1,108,763**	**998,891**	**3.12**	**51**	**13.2%**	**13.8%**
Vermont	322,539	256,442	2.34	48	337,110	261,373	2.30	2	4.5%	1.9%
Virginia	3,364,939	3,056,058	2.54	18	3,538,847	3,175,524	2.61	37	5.2%	3.9%
Washington	2,885,677	2,620,076	2.51	21	3,148,129	2,895,575	2.55	28	9.1%	10.5%
West Virginia	881,917	763,831	2.36	46	893,778	734,703	2.39	5	1.3%	-3.8%
Wisconsin	2,624,358	2,279,768	2.43	42	2,710,723	2,371,960	2.39	5	3.3%	4.0%
Wyoming	261,868	226,879	2.42	43	278,595	230,252	2.45	12	6.4%	1.5%

Note: Numbers may not sum due to rounding.
Source: U.S. Census Bureau, 2010 Census, 2018 American Community Survey 1-Year Estimates.

Table 1.11: County Population by Race and Ethnicity in Utah: 2018

Geographic Area	Total Population	Race Alone (Not Hispanic or Latino)					Two or More Races (Not Hispanic or Latino)	Hispanic or Latino Origin (of any race)	Total Minority
		White	Black/ African American	American Indian and Alaska Native	Asian	Native Hawaiian and Other Pacific Islander			
State	3,161,105	2,434,785	34,090	29,608	75,471	29,910	66,465	450,218	695,080
Share of Total Population	100.0%	78.0%	1.1%	0.9%	2.6%	1.0%	2.1%	14.2%	22.0%
Beaver	6,580	84.5%	0.2%	0.9%	0.8%	0.3%	1.6%	11.7%	15.5%
Box Elder	54,950	87.0%	0.4%	0.7%	0.8%	0.2%	1.5%	9.5%	13.0%
Cache	127,068	83.3%	0.9%	0.5%	2.5%	0.4%	1.6%	10.9%	16.7%
Carbon	20,269	83.0%	0.5%	0.9%	0.6%	0.2%	1.4%	13.3%	17.0%
Daggett	980	92.4%	0.0%	1.0%	0.3%	0.1%	2.0%	4.1%	7.6%
Davis	351,713	83.5%	1.2%	0.4%	2.0%	0.7%	2.2%	9.9%	16.5%
Duchesne	19,964	85.0%	0.3%	3.4%	0.4%	0.3%	2.3%	8.3%	15.0%
Emery	10,014	90.8%	0.3%	0.8%	0.5%	0.1%	1.2%	6.3%	9.2%
Garfield	5,080	88.1%	0.4%	2.1%	1.5%	0.4%	1.3%	6.3%	11.9%
Grand	9,764	81.8%	0.6%	3.8%	1.3%	0.1%	1.5%	10.9%	18.2%
Iron	52,775	85.9%	0.6%	1.8%	0.8%	0.4%	1.7%	8.8%	14.1%
Juab	11,555	91.9%	0.4%	0.9%	0.3%	0.2%	1.2%	5.1%	8.1%
Kane	7,709	90.8%	0.6%	1.6%	0.7%	0.2%	1.4%	4.8%	9.2%
Millard	13,006	82.6%	0.3%	1.1%	1.3%	0.2%	1.3%	13.2%	17.4%
Morgan	12,045	94.6%	0.4%	0.3%	0.6%	0.1%	0.9%	3.1%	5.4%
Piute	1,445	89.8%	0.3%	0.5%	0.4%	0.1%	1.4%	7.5%	10.2%
Rich	2,464	90.7%	0.3%	0.5%	0.3%	0.1%	1.0%	7.1%	9.3%
Salt Lake	1,152,633	70.7%	1.7%	0.7%	4.5%	1.6%	2.3%	18.6%	29.3%
San Juan	15,449	43.6%	0.4%	47.4%	0.8%	0.1%	1.9%	5.8%	56.4%
Sanpete	30,623	85.6%	0.9%	1.0%	0.8%	0.6%	1.4%	9.7%	14.4%
Sevier	21,539	91.3%	0.5%	1.0%	0.3%	0.2%	1.2%	5.4%	8.7%
Summit	41,933	84.2%	1.0%	0.3%	1.6%	0.1%	1.3%	11.4%	15.8%
Tooele	69,907	82.9%	0.7%	0.8%	0.7%	0.6%	1.7%	12.6%	17.1%
Uintah	35,438	81.3%	0.4%	6.9%	0.5%	0.3%	2.0%	8.6%	18.7%
Utah	622,213	82.1%	0.6%	0.4%	1.7%	0.9%	2.3%	12.0%	17.9%
Wasatch	33,240	83.0%	0.5%	0.3%	0.9%	0.2%	1.3%	13.8%	17.0%
Washington	171,700	84.2%	0.6%	1.0%	0.9%	0.8%	1.8%	10.6%	15.8%
Wayne	2,690	90.1%	0.4%	0.4%	0.7%	0.1%	1.2%	6.9%	9.9%
Weber	256,359	75.7%	1.3%	0.5%	1.4%	0.3%	2.0%	18.7%	24.3%

Note: As a result of the revised standards for collecting data on race and ethnicity issued by the Office of Management and Also, respondents were allowed to select more than one race. Respondents who selected more than one race are included in the "Two or More Races" category. For postcensal population estimates, the "Some Other Race" category was omitted.
Budget in 1997, the federal government treats Hispanic origin and race as separate and distinct concepts.
Therefore people identifying as Hispanic or Latino may be of any race.
Source: U.S. Census Bureau, Population Division, Vintage 2019 Estimates

Table 1.12: Total Population by City

	2010 Census (April 1)	Population Estimate (July 1)									Change from 2010 Census to 2018		Change from 2017 to 2018	
		2010	2011	2012	2013	2014	2015	2016	2017	2018	Percent	Number	Percent	Number
Utah	2,763,885	2,775,334	2,814,216	2,853,467	2,897,927	2,937,399	2,982,497	3,042,613	3,103,118	3,161,105	10.4%	339,233	1.9%	57,987
Beaver County	6,629	6,655	6,557	6,499	6,455	6,429	6,351	6,458	6,396	6580	-0.7%	-49	2.9%	184
Beaver	3,112	3,136	3,091	3,068	3,046	3,038	2,998	3,036	2,993	3,104	-0.3%	-8	3.7%	111
Milford	1,409	1,412	1,386	1,372	1,360	1,351	1,336	1,362	1,350	1,376	-2.3%	-33	1.9%	26
Minersville	907	911	898	889	885	881	872	891	888	907	0.0%	0	2.1%	19
Balance of Beaver County	1,201	1,196	1,182	1,170	1,164	1,159	1,145	1,169	1,165	1,193	-0.7%	-8	2.4%	28
Box Elder County	49,975	50,170	50,233	50,201	50,729	51,303	51,832	52,953	53,967	54,950	10.0%	4,975	1.8%	983
Bear River City	853	856	851	840	844	846	856	873	881	887	4.0%	34	0.7%	6
Brigham City	17,899	17,966	18,039	18,163	18,418	18,544	18,644	18,880	19,145	19,404	8.4%	1,505	1.4%	259
Corinne	685	690	681	688	687	689	695	708	726	739	7.9%	54	1.8%	13
Deweyville	332	336	332	328	327	328	328	334	340	356	7.2%	24	4.7%	16
Elwood	1,034	1,077	1,073	1,069	1,070	1,072	1,074	1,084	1,094	1,097	6.1%	63	0.3%	3
Fielding	455	463	457	451	450	451	455	462	469	473	4.0%	18	0.9%	4
Garland	2,400	2,442	2,423	2,395	2,406	2,422	2,439	2,487	2,523	2,548	6.2%	148	1.0%	25
Honeyville	1,441	1,446	1,433	1,424	1,421	1,433	1,445	1,496	1,541	1,582	9.8%	141	2.7%	41
Howell	245	245	245	244	243	244	244	247	249	250	2.0%	5	0.4%	1
Mantua	687	690	681	675	679	688	722	778	821	878	27.8%	191	6.9%	57
Perry	4,512	4,523	4,497	4,473	4,506	4,582	4,656	4,803	4,962	5,094	12.9%	582	2.7%	132
Plymouth	414	405	402	400	399	400	407	425	438	449	8.5%	35	2.5%	11
Portage	245	245	249	246	246	249	252	254	261	264	7.8%	19	1.1%	3
Snowville	167	167	170	168	168	168	168	170	171	172	3.0%	5	0.6%	1
Tremonton	7,647	7,728	7,848	7,828	7,944	8,092	8,185	8,400	8,610	8,882	16.2%	1,235	3.2%	272
Willard	1,772	1,779	1,764	1,752	1,760	1,774	1,783	1,814	1,856	1,914	8.0%	142	3.1%	58
Balance of Box Elder County	9,187	9,112	9,088	9,057	9,161	9,321	9,479	9,738	9,880	9,961	8.4%	774	0.8%	81
Cache County	112,656	113,386	114,774	115,897	117,031	117,906	119,774	122,367	124,564	127,068	12.8%	14,412	2.0%	2,504
Amalga	488	492	496	501	500	504	507	513	526	539	10.5%	51	2.5%	13
Clarkston	666	680	686	689	682	684	697	715	732	730	9.6%	64	-0.3%	-2
Cornish	288	298	300	302	303	304	308	311	321	328	13.9%	40	2.2%	7
Hyde Park	3,833	3,882	3,973	4,070	4,157	4,267	4,341	4,487	4,584	4,700	22.6%	867	2.5%	116
Hyrum	7,609	7,666	7,727	7,776	7,769	7,825	7,903	7,995	8,209	8,403	10.4%	794	2.4%	194
Lewiston	1,766	1,779	1,777	1,779	1,763	1,756	1,763	1,804	1,811	1,811	2.5%	45	0.0%	0
Logan	48,174	48,463	49,053	49,115	49,079	49,074	49,826	50,712	51,172	51,619	7.2%	3,445	0.9%	447
Mendon	1,282	1,346	1,340	1,335	1,329	1,329	1,344	1,383	1,403	1,414	10.3%	132	0.8%	11
Millville	1,829	1,900	1,913	1,924	1,923	1,937	1,956	1,977	2,032	2,078	13.6%	249	2.3%	46
Newton	789	795	789	792	788	787	788	806	812	813	3.0%	24	0.1%	1
Nibley	5,438	5,564	5,751	5,862	5,979	6,167	6,404	6,696	6,922	7,087	30.3%	1,649	2.4%	165
North Logan	8,269	8,339	8,392	8,790	9,666	9,864	10,104	10,503	10,656	11,176	35.2%	2,907	4.9%	520
Paradise	904	908	914	921	918	926	937	947	972	995	10.1%	91	2.4%	23
Providence	7,075	6,993	6,997	7,008	6,998	7,049	7,144	7,227	7,420	7,595	7.3%	520	2.4%	175
Richmond	2,470	2,494	2,511	2,528	2,524	2,544	2,569	2,600	2,669	2,730	10.5%	260	2.3%	61
River Heights	1,734	1,854	1,867	1,881	1,877	1,890	1,910	1,933	1,982	2,029	17.0%	295	2.4%	47
Smithfield	9,495	9,693	9,970	10,238	10,402	10,550	10,720	11,082	11,385	11,811	24.4%	2,316	3.7%	426
Trenton	464	494	497	499	499	503	509	514	528	539	16.2%	75	2.1%	11
Wellsville	3,432	3,514	3,542	3,566	3,560	3,586	3,623	3,665	3,760	3,849	12.2%	417	2.4%	89
Balance of Cache County	6,651	6,232	6,279	6,321	6,315	6,360	6,421	6,497	6,668	6,822	2.6%	171	2.3%	154
Carbon County	21,403	21,403	21,303	21,221	20,901	20,634	20,385	20,323	20,168	20,269	-5.3%	-1,134	0.5%	101
East Carbon-Sunnyside	A	1,679	1,673	1,669	1,649	1,619	1,584	1,572	1,564	1,574	N/A	N/A	0.6%	10
Helper	2,201	2,206	2,197	2,192	2,164	2,133	2,097	2,089	2,077	2,091	-5.0%	-110	0.7%	14
Price	8,715	8,713	8,655	8,606	8,443	8,357	8,318	8,305	8,216	8,232	-5.5%	-483	0.2%	16
Scofield	24	24	24	24	23	23	23	23	22	23	-4.2%		4.5%	1

Table 1.12: Total Population by City

(continued)

	2010 Census (April 1)	Population Estimate (July 1)									Change from 2010 Census to 2018		Change from 2017 to 2018	
		2010	2011	2012	2013	2014	2015	2016	2017	2018	Percent	Number	Percent	Number
Wellington	1,676	1,690	1,684	1,679	1,659	1,634	1,607	1,602	1,593	1,603	-4.4%	-73	0.6%	10
Balance of Carbon County	7,109	7,091	7,070	7,051	6,963	6,868	6,756	6,732	6,696	6,746	-5.1%	-363	0.7%	50
Daggett County	1,059	1,077	1,162	1,095	1,140	1,124	1,105	1,075	1,022	980	-7.5%	-79	-4.1%	-42
Dutch John	A	148	160	152	157	155	153	147	149	144	N/A	N/A	-3.4%	-5
Manila	310	330	355	331	346	336	332	321	329	316	1.9%	6	-4.0%	-13
Balance of Daggett County	749	599	647	612	637	633	620	607	544	520	-30.6%	-229	-4.4%	-24
Davis County	306,479	307,906	311,838	315,933	322,251	328,756	334,676	341,080	346,881	351,713	14.8%	45,234	1.4%	4,832
Bountiful	42,552	42,670	42,839	42,900	42,925	43,287	43,593	43,919	44,022	44,098	3.6%	1,546	0.2%	76
Centerville	15,335	15,359	15,549	16,167	16,554	16,748	16,821	17,232	17,619	17,700	15.4%	2,365	0.5%	81
Clearfield	30,112	30,039	30,234	30,255	30,295	30,291	30,632	30,836	31,293	31,967	6.2%	1,855	2.2%	674
Clinton	20,426	20,569	20,724	20,827	20,893	21,072	21,265	21,534	21,925	22,315	9.2%	1,889	1.8%	390
Farmington	18,275	18,422	19,256	20,673	21,462	22,020	22,445	23,013	24,010	24,514	34.1%	6,239	2.1%	504
Fruit Heights	4,987	5,054	5,116	5,353	5,640	5,905	6,056	6,149	6,207	6,234	25.0%	1,247	0.4%	27
Kaysville	27,300	27,705	28,250	28,543	28,959	29,571	30,307	31,086	31,703	32,095	17.6%	4,795	1.2%	392
Layton	67,311	67,783	68,452	68,879	70,962	72,353	73,931	75,489	76,484	77,303	14.8%	9,992	1.1%	819
North Salt Lake	16,322	16,326	16,546	16,805	17,723	18,965	19,658	20,203	20,461	20,850	27.7%	4,528	1.9%	389
South Weber	6,051	6,145	6,269	6,429	6,562	6,768	6,978	7,209	7,338	7,518	24.2%	1,467	2.5%	180
Sunset	5,122	5,159	5,171	5,165	5,154	5,167	5,182	5,218	5,273	5,341	4.3%	219	1.3%	68
Syracuse	24,331	24,515	24,843	25,128	25,677	26,532	27,230	28,234	29,439	30,400	24.9%	6,069	3.3%	961
West Bountiful	5,265	5,278	5,306	5,322	5,356	5,434	5,502	5,569	5,639	5,731	8.9%	466	1.6%	92
West Point	9,511	9,461	9,646	9,706	9,797	10,063	10,286	10,487	10,582	10,753	13.1%	1,242	1.6%	171
Woods Cross	9,761	9,837	10,086	10,218	10,738	11,080	11,251	11,325	11,341	11,328	16.1%	1,567	-0.1%	-13
Balance of Davis County	3,818	3,584	3,551	3,563	3,554	3,500	3,539	3,577	3,545	3,566	-6.6%	-252	0.6%	21
Duchesne County	18,607	18,647	18,701	19,004	19,965	20,206	20,756	20,255	19,915	19,964	7.3%	1,357	0.2%	49
Altamont	225	238	239	241	252	257	263	253	247	246	9.3%	21	-0.4%	
Duchesne	1,690	1,721	1,720	1,738	1,812	1,821	1,864	1,809	1,772	1,770	4.7%	80	-0.1%	-2
Myton	569	576	576	584	605	622	640	624	620	614	7.9%	45	-1.0%	-6
Roosevelt	6,046	6,194	6,233	6,368	6,724	6,819	7,036	6,935	6,926	7,070	16.9%	1,024	2.1%	144
Tabiona	171	156	155	158	167	168	173	169	164	162	-5.3%	-9	-1.2%	-2
Balance of Duchesne County	9,906	9,762	9,778	9,915	10,405	10,519	10,780	10,465	10,186	10,102	2.0%	196	-0.8%	-84
Emery County	10,976	11,005	10,984	10,938	10,759	10,638	10,359	10,207	10,020	10,014	-8.8%	-962	-0.1%	-6
Castle Dale	1,630	1,643	1,640	1,629	1,600	1,585	1,542	1,518	1,491	1,491	-8.5%	-139	0.0%	0
Clawson	163	199	198	199	198	195	189	188	184	186	14.1%	23	1.1%	2
Cleveland	464	471	473	474	466	462	451	446	438	439	-5.4%	-25	0.2%	1
Elmo	418	436	438	437	439	433	421	413	405	404	-3.3%	-14	-0.2%	
Emery	288	290	291	290	284	284	276	271	267	268	-6.9%	-20	0.4%	1
Ferron	1,626	1,671	1,664	1,657	1,623	1,601	1,557	1,529	1,498	1,494	-8.1%	-132	-0.3%	-4
Green River	952	1,032	1,030	1,028	1,009	998	969	954	934	934	-1.9%	-18	0.0%	0
Huntington	2,129	2,149	2,144	2,127	2,087	2,063	2,005	1,975	1,939	1,933	-9.2%	-196	-0.3%	-6
Orangeville	1,470	1,481	1,472	1,467	1,439	1,419	1,381	1,359	1,333	1,329	-9.6%	-141	-0.3%	-4
Balance of Emery County	1,836	1,633	1,634	1,630	1,614	1,598	1,568	1,554	1,531	1,536	-16.3%	-300	0.3%	5
Garfield County	5,172	5,197	5,148	5,063	5,029	5,005	4,969	4,971	5,061	5,080	-1.8%	-92	0.4%	19
Antimony	122	125	125	122	121	121	120	120	122	122	0.0%	0	0.0%	0
Boulder	226	228	225	221	222	226	226	229	240	240	6.2%	14	0.0%	0
Bryce Canyon City	198	231	229	225	223	221	219	219	223	224	13.1%	26	0.4%	1
Cannonville	167	179	178	173	173	172	171	171	174	175	4.8%	8	0.6%	1
Escalante	797	824	815	802	797	791	786	785	799	802	0.6%	5	0.4%	3

Table 1.12: Total Population by City

(continued)

	2010 Census (April 1)	Population Estimate (July 1)									Change from 2010 Census to 2018		Change from 2017 to 2018	
		2010	2011	2012	2013	2014	2015	2016	2017	2018	Percent	Number	Percent	Number
Hatch	133	146	145	143	142	141	140	140	142	143	7.5%	10	0.7%	1
Henrieville	230	231	229	226	222	221	219	220	223	224	-2.6%	-6	0.4%	1
Panguitch	1,520	1,735	1,718	1,690	1,678	1,670	1,656	1,656	1,682	1,691	11.3%	171	0.5%	9
Tropic	530	532	527	519	516	512	509	509	518	519	-2.1%	-11	0.2%	1
Balance of Garfield County	1,249	966	957	942	935	930	923	922	938	940	-24.7%	-309	0.2%	2
Grand County	9,225	9,312	9,295	9,355	9,373	9,477	9,555	9,642	9,640	9,764	5.8%	539	1.3%	124
Castle Valley	319	326	325	331	333	337	340	347	348	351	10.0%	32	0.9%	3
Moab	5,046	5,111	5,093	5,181	5,178	5,218	5,249	5,266	5,239	5,322	5.5%	276	1.6%	83
Balance of Grand County	3,860	3,875	3,877	3,843	3,862	3,922	3,966	4,029	4,053	4,091	6.0%	231	0.9%	38
Iron County	46,163	46,263	46,615	46,644	46,527	47,045	48,120	49,692	50,822	52,775	14.3%	6,612	3.8%	1,953
Brian Head	83	85	85	86	85	85	86	87	89	91	9.6%	8	2.2%	2
Cedar City	28,857	28,932	29,143	29,061	28,970	29,314	29,972	31,003	31,695	33,055	14.5%	4,198	4.3%	1,360
Cedar Highlands	N/A	60	61	61	60	61	63	64	65	67	N/A	N/A	3.1%	2
Enoch	5,803	5,889	5,985	6,033	6,027	6,097	6,245	6,537	6,742	7,039	21.3%	1,236	4.4%	297
Kanarraville	355	358	360	360	364	368	374	385	396	402	13.2%	47	1.5%	6
Paragonah	488	498	500	503	503	503	511	523	528	536	9.8%	48	1.5%	8
Parowan	2,790	2,805	2,814	2,829	2,822	2,846	2,913	2,972	3,026	3,100	11.1%	310	2.4%	74
Balance of Iron County	7,787	7,636	7,667	7,711	7,696	7,771	7,956	8,121	8,281	8,485	9.0%	698	2.5%	204
Juab County	10,246	10,263	10,311	10,294	10,261	10,409	10,541	10,985	11,248	11,555	12.8%	1,309	2.7%	307
Eureka	669	669	670	667	664	667	667	685	688	695	3.9%	26	1.0%	7
Levan	841	846	855	851	846	859	871	898	904	924	9.9%	83	2.2%	20
Mona	1,547	1,538	1,544	1,540	1,539	1,563	1,587	1,648	1,681	1,735	12.2%	188	3.2%	54
Nephi	5,389	5,397	5,421	5,409	5,391	5,464	5,528	5,781	5,951	6,111	13.4%	722	2.7%	160
Rocky Ridge	733	734	735	737	734	749	762	792	807	833	13.6%	100	3.2%	26
Santaquin (pt.)	0	0	0	0	0	0	0	0	0	0	N/A	N/A	N/A	N/A
Balance of Juab County	1,067	1,079	1,086	1,090	1,087	1,107	1,126	1,181	1,217	1,257	17.8%	190	3.3%	40
Kane County	7,125	7,213	7,293	7,173	7,122	7,166	7,040	7,300	7,537	7,709	8.2%	584	2.3%	172
Alton	119	119	119	117	116	116	114	116	119	120	0.8%	1	0.8%	1
Big Water	475	480	483	475	472	475	470	483	495	503	5.9%	28	1.6%	8
Glendale	381	380	385	379	375	378	368	377	385	399	4.7%	18	3.6%	14
Kanab	4,312	4,410	4,457	4,384	4,355	4,380	4,305	4,497	4,668	4,798	11.3%	486	2.8%	130
Orderville	577	579	587	577	571	573	561	575	587	591	2.4%	14	0.7%	4
Balance of Kane County	1,261	1,245	1,262	1,241	1,233	1,244	1,222	1,252	1,283	1,298	2.9%	37	1.2%	15
Millard County	12,503	12,541	12,569	12,468	12,558	12,544	12,627	12,657	12,829	13,006	4.0%	503	1.4%	177
Delta	3,436	3,445	3,455	3,427	3,451	3,449	3,467	3,487	3,529	3,554	3.4%	118	0.7%	25
Fillmore	2,435	2,477	2,487	2,475	2,491	2,493	2,499	2,497	2,532	2,608	7.1%	173	3.0%	76
Hinckley	696	697	697	689	696	697	698	700	704	707	1.6%	11	0.4%	3
Holden	378	378	381	376	379	375	376	377	383	385	1.9%	7	0.5%	2
Kanosh	474	474	474	469	472	471	471	469	475	479	1.1%	5	0.8%	4
Leamington	226	226	226	224	225	225	228	227	231	235	4.0%	9	1.7%	4
Lynndyl	106	108	106	105	107	107	109	111	112	112	5.7%	6	0.0%	0
Meadow	310	310	310	309	311	310	313	313	318	323	4.2%	13	1.6%	5
Oak City	578	607	610	604	613	614	629	634	641	647	11.9%	69	0.9%	6
Scipio	327	327	327	326	328	327	327	326	328	329	0.6%	2	0.3%	1
Balance of Millard County	3,537	3,492	3,496	3,464	3,485	3,476	3,510	3,516	3,576	3,627	2.5%	90	1.4%	51

Table 1.12: Total Population by City

(continued)

	2010 Census (April 1)	Population Estimate (July 1)									Change from 2010 Census to 2018		Change from 2017 to 2018	
		2010	2011	2012	2013	2014	2015	2016	2017	2018	Percent	Number	Percent	Number
Morgan County	9,469	9,522	9,652	9,807	10,208	10,602	11,046	11,386	11,875	12,045	27.2%	2,576	1.4%	170
Morgan	3,687	3,674	3,685	3,707	3,902	3,965	4,054	4,148	4,251	4,260	15.5%	573	0.2%	9
Balance of Morgan County	5,782	5,848	5,967	6,100	6,306	6,637	6,992	7,238	7,624	7,785	34.6%	2,003	2.1%	161
Piute County	1,556	1,565	1,498	1,496	1,487	1,467	1,491	1,459	1,413	1,445	-7.1%	-111	2.3%	32
Circleville	547	551	527	526	522	510	514	499	477	483	-11.7%	-64	1.3%	6
Junction	191	192	184	185	183	179	181	175	167	170	-11.0%	-21	1.8%	3
Kingston	173	174	167	167	165	163	162	158	152	152	-12.1%	-21	0.0%	0
Marysvale	408	400	381	379	379	382	399	399	396	418	2.5%	10	5.6%	22
Balance of Piute County	237	248	239	239	238	233	235	228	221	222	-6.3%	-15	0.5%	1
Rich County	2,264	2,255	2,295	2,258	2,264	2,274	2,300	2,312	2,402	2,464	8.8%	200	2.6%	62
Garden City	562	560	570	561	561	565	572	579	599	612	8.9%	50	2.2%	13
Lake	248	250	255	251	252	253	256	257	267	273	10.1%	25	2.2%	6
Randolph	464	460	467	460	458	460	464	465	484	498	7.3%	34	2.9%	14
Woodruff	180	194	197	194	196	195	198	199	206	212	17.8%	32	2.9%	6
Balance of Rich County	810	791	806	792	797	801	810	812	846	869	7.3%	59	2.7%	23
Salt Lake County	1,029,655	1,032,979	1,047,557	1,064,021	1,079,543	1,090,257	1,102,629	1,120,684	1,137,820	1,152,633	11.9%	122,978	1.3%	14,813
Alta	383	384	387	389	391	387	386	386	383	383	0.0%	0	0.0%	0
Bluffdale (pt.)	7,598	7,619	7,767	7,970	8,370	9,835	10,824	11,717	13,488	14,699	93.5%	7,101	9.0%	1,211
Cottonwood Heights	33,433	33,596	33,867	34,146	34,341	34,227	34,180	34,204	34,052	34,117	2.0%	684	0.2%	65
Draper (pt.)	40,532	40,597	41,536	42,322	43,304	44,172	44,661	44,923	45,564	46,121	13.8%	5,589	1.2%	557
Herriman	21,785	22,519	23,366	24,394	26,301	28,484	30,599	35,083	39,238	44,877	106.0%	23,092	14.4%	5,639
Holladay	26,472	30,142	30,392	30,656	30,853	30,788	30,762	30,813	30,757	30,697	16.0%	4,225	-0.2%	-60
Midvale	27,964	28,324	28,660	30,283	30,788	31,669	32,485	32,993	33,603	33,636	20.3%	5,672	0.1%	33
Millcreek	A	58,848	59,387	59,881	60,285	60,211	60,186	60,367	60,768	61,270	N/A	N/A	0.8%	502
Murray	46,746	46,725	47,141	48,215	48,564	48,750	49,043	49,161	49,371	49,308	5.5%	2,562	-0.1%	-63
Riverton	38,753	38,966	39,558	40,421	40,885	41,332	41,630	42,639	43,404	44,419	14.6%	5,666	2.3%	1,015
Salt Lake City	186,440	186,571	188,181	189,715	191,661	191,398	191,737	194,182	200,570	200,591	7.6%	14,151	0.0%	21
Sandy	87,461	90,034	90,877	91,782	92,459	93,215	94,421	96,293	96,314	96,901	10.8%	9,440	0.6%	587
South Jordan	50,418	51,307	53,316	55,878	59,185	62,501	66,100	68,595	71,027	74,149	47.1%	23,731	4.4%	3,122
South Salt Lake	23,617	23,576	23,899	24,270	24,619	24,620	24,673	24,648	24,990	25,365	7.4%	1,748	1.5%	375
Taylorsville	58,652	58,760	59,759	60,240	60,563	60,396	60,327	60,407	60,091	60,192	2.6%	1,540	0.2%	101
West Jordan	103,712	104,034	106,356	108,155	109,812	110,503	111,394	113,380	114,070	116,046	11.9%	12,334	1.7%	1,976
West Valley City	129,480	129,666	131,028	132,527	133,814	134,506	135,981	136,751	136,408	136,401	5.3%	6,921	-0.0%	-7
Balance of Salt Lake County	146,209	81,311	82,080	82,777	83,348	83,263	83,240	84,142	83,722	83,461	-42.9%	-62,748	-0.3%	-261
San Juan County	14,746	14,825	14,836	15,034	14,983	15,052	15,240	15,343	15,320	15,449	4.8%	703	0.8%	129
Blanding	3,375	3,380	3,390	3,507	3,569	3,641	3,681	3,688	3,682	3,696	9.5%	321	0.4%	14
Monticello	1,972	1,993	1,988	1,995	1,976	1,976	1,995	2,012	1,991	1,997	1.3%	25	0.3%	6
Balance of San Juan County	9,399	9,452	9,458	9,532	9,438	9,435	9,564	9,643	9,647	9,756	3.8%	357	1.1%	109
Sanpete County	27,822	27,939	27,999	27,954	28,124	28,295	28,663	29,256	29,991	30,623	10.1%	2,801	2.1%	632
Centerfield	1,367	1,378	1,367	1,361	1,360	1,370	1,387	1,414	1,443	1,475	7.9%	108	2.2%	32
Ephraim	6,135	6,150	6,351	6,438	6,632	6,645	6,811	7,012	7,141	7,292	18.9%	1,157	2.1%	151
Fairview	1,247	1,247	1,239	1,233	1,232	1,241	1,256	1,281	1,308	1,340	7.5%	93	2.4%	32
Fayette	242	242	240	241	240	240	245	249	253	261	7.9%	19	3.2%	8
Fountain Green	1,071	1,071	1,065	1,058	1,058	1,064	1,078	1,101	1,125	1,149	7.3%	78	2.1%	24
Gunnison	3,285	3,330	3,315	3,262	3,265	3,303	3,263	3,293	3,506	3,536	7.6%	251	0.9%	30
Manti	3,276	3,376	3,353	3,338	3,332	3,354	3,399	3,467	3,535	3,614	10.3%	338	2.2%	79
Mayfield	496	516	512	509	509	513	520	528	540	552	11.3%	56	2.2%	12

Table 1.12: Total Population by City

(continued)

	2010 Census (April 1)	Population Estimate (July 1)									Change from 2010 Census to 2018		Change from 2017 to 2018	
		2010	2011	2012	2013	2014	2015	2016	2017	2018	Percent	Number	Percent	Number
Moroni	1,423	1,432	1,419	1,413	1,412	1,421	1,439	1,468	1,498	1,535	7.9%	112	2.5%	37
Mount Pleasant	3,260	3,266	3,246	3,232	3,227	3,247	3,288	3,349	3,413	3,488	7.0%	228	2.2%	75
Spring City	988	993	987	983	980	988	1,000	1,021	1,040	1,067	8.0%	79	2.6%	27
Sterling	262	293	290	291	290	290	296	301	309	315	20.2%	53	1.9%	6
Wales	302	346	345	343	341	345	348	356	361	371	22.8%	69	2.8%	10
Balance of Sanpete County	4,468	4,299	4,270	4,252	4,246	4,274	4,333	4,416	4,519	4,628	3.6%	160	2.4%	109
Sevier County	20,802	20,800	20,870	20,658	20,749	20,735	20,860	21,137	21,317	21,539	3.5%	737	1.0%	222
Annabella	795	781	786	779	782	781	789	794	802	809	1.8%	14	0.9%	7
Aurora	1,016	1,018	1,022	1,011	1,017	1,017	1,024	1,033	1,043	1,049	3.2%	33	0.6%	6
Central Valley	528	546	551	544	547	549	552	557	563	564	6.8%	36	0.2%	1
Elsinore	847	852	853	847	853	851	857	865	874	880	3.9%	33	0.7%	6
Glenwood	464	460	461	458	460	460	463	466	472	473	1.9%	9	0.2%	1
Joseph	344	344	346	344	344	345	348	351	355	356	3.5%	12	0.3%	1
Koosharem	327	324	320	310	315	326	317	332	334	332	1.5%	5	-0.6%	-2
Monroe	2,256	2,270	2,282	2,262	2,271	2,271	2,286	2,308	2,329	2,341	3.8%	85	0.5%	12
Redmond	730	729	731	729	734	733	737	739	743	741	1.5%	11	-0.3%	-2
Richfield	7,551	7,568	7,585	7,494	7,520	7,498	7,538	7,691	7,747	7,908	4.7%	357	2.1%	161
Salina	2,489	2,491	2,501	2,477	2,490	2,489	2,508	2,530	2,551	2,564	3.0%	75	0.5%	13
Sigurd	429	427	429	426	426	426	430	433	437	439	2.3%	10	0.5%	2
Balance of Sevier County	3,026	2,990	3,003	2,977	2,990	2,989	3,011	3,038	3,067	3,083	1.9%	57	0.5%	16
Summit County	36,324	36,500	37,418	37,862	38,421	39,118	39,647	40,506	41,349	41,933	15.4%	5,609	1.4%	584
Coalville	1,363	1,370	1,394	1,404	1,420	1,449	1,460	1,489	1,568	1,581	16.0%	218	0.8%	13
Francis	1,077	1,067	1,093	1,104	1,126	1,166	1,271	1,357	1,461	1,533	42.3%	456	4.9%	72
Henefer	766	790	808	826	843	873	878	885	929	959	25.2%	193	3.2%	30
Kamas	1,811	1,856	1,891	1,934	1,969	2,046	2,079	2,137	2,187	2,234	23.4%	423	2.1%	47
Oakley	1,470	1,476	1,504	1,520	1,549	1,585	1,601	1,634	1,667	1,682	14.4%	212	0.9%	15
Park City (pt.)	7,547	7,631	7,763	7,829	7,922	8,076	8,147	8,303	8,428	8,504	12.7%	957	0.9%	76
Balance of Summit County	22,290	22,310	22,965	23,245	23,592	23,923	24,211	24,701	25,109	25,440	14.1%	3,150	1.3%	331
Tooele County	58,218	58,501	59,182	59,788	60,633	61,446	62,617	64,535	67,418	69,907	20.1%	11,689	3.7%	2,489
Grantsville	8,893	8,973	9,118	9,404	9,618	9,832	9,993	10,431	10,994	11,568	30.1%	2,675	5.2%	574
Ophir	38	44	45	45	46	46	52	53	57		N/A	N/A	N/A	N/A
Rush Valley	447	442	449	456	469	468	471	477	485	490	9.6%	43	1.0%	5
Stockton	616	634	632	632	633	643	646	654	674	684	11.0%	68	1.5%	10
Tooele	31,605	31,728	32,023	32,071	32,306	32,521	33,005	33,639	34,612	35,251	11.5%	3,646	1.8%	639
Vernon	243	249	254	257	265	273	282	295	318	338	39.1%	95	6.3%	20
Wendover	1,400	1,404	1,403	1,405	1,413	1,413	1,414	1,425	1,453	1,469	4.9%	69	1.1%	16
Balance of Tooele County	14,976	15,071	15,303	15,563	15,929	16,296	16,806	17,614	18,882	20,107	34.3%	5,131	6.5%	1,225
Uintah County	32,588	32,469	33,241	34,641	35,683	36,921	37,783	36,254	35,219	35,438	8.7%	2,850	0.6%	219
Ballard	801	811	838	882	918	1,022	1,112	1,075	1,042	1,046	30.6%	245	0.4%	4
Naples	1,755	1,738	1,784	1,871	2,037	2,143	2,199	2,117	2,052	2,066	17.7%	311	0.7%	14
Vernal	9,089	9,092	9,278	9,887	10,397	10,846	11,103	10,633	10,320	10,370	14.1%	1,281	0.5%	50
Balance of Uintah County	20,943	20,828	21,341	22,001	22,331	22,910	23,369	22,429	21,805	21,956	4.8%	1,013	0.7%	151
Utah County	516,564	519,994	530,658	539,704	551,333	560,751	572,650	590,082	606,503	622,213	20.5%	105,649	2.6%	15,710
Alpine	9,555	9,811	9,938	10,042	10,183	10,286	10,360	10,489	10,539	10,504	9.9%	949	-0.3%	-35
American Fork	26,263	26,686	27,096	27,401	27,845	28,142	28,204	28,660	29,477	32,519	23.8%	6,256	10.3%	3,042
Bluffdale (pt.)		0	0	0	0	0	0	0	0	0	N/A	N/A	N/A	N/A
Cedar Fort	368	370	375	376	378	382	382	388	392	397	7.9%	29	1.3%	5

Table 1.12: Total Population by City

(continued)

	2010 Census (April 1)	Population Estimate (July 1)									Change from 2010 Census to 2018		Change from 2017 to 2018	
		2010	2011	2012	2013	2014	2015	2016	2017	2018	Percent	Number	Percent	Number
Cedar Hills	9,796	9,852	9,947	10,055	10,162	10,245	10,189	10,301	10,313	10,217	4.3%	421	-0.9%	-96
Draper (pt.)	1,742	1,830	1,869	1,908	1,955	2,000	2,121	2,161	2,197	2,198	26.2%	456	0.0%	1
Eagle Mountain	21,415	22,221	23,161	23,651	24,569	25,917	27,026	28,869	32,105	35,616	66.3%	14,201	10.9%	3,511
Elk Ridge	2,436	2,468	2,540	2,689	2,839	2,992	3,144	3,388	3,750	4,053	66.4%	1,617	8.1%	303
Fairfield	119	120	120	121	121	124	129	135	143	141	18.5%	22	-1.4%	-2
Genola	1,370	1,380	1,397	1,407	1,419	1,434	1,440	1,483	1,516	1,549	13.1%	179	2.2%	33
Goshen	921	922	928	932	942	951	942	950	950	936	1.6%	15	-1.5%	-14
Highland	15,523	15,645	16,053	16,437	16,970	17,394	17,810	18,465	18,913	19,183	23.6%	3,660	1.4%	270
Lehi	47,407	48,177	49,680	51,391	55,099	57,011	59,033	61,675	63,654	66,037	39.3%	18,630	3.7%	2,383
Lindon	10,070	10,096	10,237	10,387	10,515	10,620	10,717	10,854	10,940	10,970	8.9%	900	0.3%	30
Mapleton	7,979	8,089	8,291	8,482	8,752	9,023	9,163	9,448	9,750	10,168	27.4%	2,189	4.3%	418
Orem	88,328	88,722	89,600	90,579	91,327	91,375	93,770	96,865	97,627	97,521	10.4%	9,193	-0.1%	-106
Payson	18,294	18,631	18,949	19,160	19,342	19,495	19,502	19,771	19,850	19,826	8.4%	1,532	-0.1%	-24
Pleasant Grove	33,509	33,729	34,127	34,484	34,869	36,881	37,753	38,485	38,758	38,428	14.7%	4,919	-0.9%	-330
Provo	112,488	112,919	115,181	115,560	116,127	115,397	114,590	116,573	117,518	116,702	3.7%	4,214	-0.7%	-816
Salem	6,423	6,464	6,607	6,752	6,905	7,200	7,417	7,777	8,190	8,469	31.9%	2,046	3.4%	279
Santaquin (pt.)	9,128	9,253	9,543	9,894	10,054	10,302	10,553	11,041	11,622	12,274	34.5%	3,146	5.6%	652
Saratoga Springs	17,781	18,059	19,039	21,071	22,580	24,159	25,127	26,596	29,527	31,393	76.6%	13,612	6.3%	1,866
Spanish Fork	34,691	35,170	35,882	36,331	36,927	37,463	37,871	38,683	39,356	39,961	15.2%	5,270	1.5%	605
Springville	29,466	29,811	30,389	30,738	31,272	31,494	32,259	32,970	33,223	33,104	12.3%	3,638	-0.4%	-119
Vineyard	139	113	149	203	431	650	3,342	4,143	6,175	10,052	7131.7%	9,913	62.8%	3,877
Woodland Hills	1,344	1,369	1,394	1,415	1,436	1,455	1,468	1,509	1,545	1,567	16.6%	223	1.4%	22
Balance of Utah County	10,009	8,087	8,166	8,238	8,314	8,359	8,338	8,403	8,473	8,428	-15.8%	-1,581	-0.5%	-45
Wasatch County	23,530	23,644	24,408	25,345	26,589	27,822	29,147	30,430	31,975	33,240	41.3%	9,710	4.0%	1,265
Charleston	415	427	432	439	451	456	470	473	481	481	15.9%	66	0.0%	0
Daniel	938	923	974	994	1,023	1,035	1,054	1,061	1,067	1,079	15.0%	141	1.1%	12
Heber	11,362	11,512	11,792	12,373	13,073	13,729	14,366	15,008	15,755	16,400	44.3%	5,038	4.1%	645
Hideout	656	658	693	715	747	778	825	865	938	975	48.6%	319	3.9%	37
Independence	164	150	160	163	169	177	187	198	212	212	29.3%	48	0.0%	0
Interlaken	A	157	166	171	178	187	198	207	220	231	N/A	N/A	5.0%	11
Midway	3,845	3,908	3,968	4,080	4,265	4,497	4,681	4,898	5,089	5,257	36.7%	1,412	3.3%	168
Park City (pt.)	11	0	0	0	0	0	0	0	0	0	N/A	N/A	N/A	N/A
Wallsburg	250	259	272	282	292	307	325	339	362	379	51.6%	129	4.7%	17
Balance of Wasatch County	5,889	5,650	5,951	6,128	6,391	6,656	7,041	7,381	7,851	8,226	39.7%	2,337	4.8%	375
Washington County	138,115	138,392	141,245	144,146	147,004	151,109	154,680	159,337	165,859	171,700	24.3%	33,585	3.5%	5,841
Apple Valley	701	703	709	718	718	719	718	741	774	824	17.5%	123	6.5%	50
Enterprise	1,711	1,710	1,731	1,747	1,750	1,768	1,787	1,812	1,842	1,862	8.8%	151	1.1%	20
Hildale	2,726	2,771	2,909	2,925	2,916	2,901	2,906	2,922	2,931	2,910	6.7%	184	-0.7%	-21
Hurricane	13,748	13,793	14,013	14,313	14,573	15,011	15,489	16,163	17,151	18,205	32.4%	4,457	6.1%	1,054
Ivins	6,753	6,771	6,915	7,133	7,331	7,605	7,808	8,056	8,736	8,913	32.0%	2,160	2.0%	177
La Verkin	4,060	4,065	4,108	4,143	4,138	4,167	4,204	4,264	4,352	4,398	8.3%	338	1.1%	46
Leeds	820	811	815	822	824	832	837	849	864	866	5.6%	46	0.2%	2
New Harmony	207	207	210	211	212	214	215	219	224	225	8.7%	18	0.4%	1
Rockville	245	245	246	249	248	252	259	269	272	272	11.0%	27	0.0%	0
St. George	72,897	72,840	73,786	75,012	76,284	77,960	79,586	81,684	84,509	87,178	19.6%	14,281	3.2%	2,669
Santa Clara	6,003	6,144	6,268	6,375	6,450	6,602	6,759	6,970	7,426	7,871	31.1%	1,868	6.0%	445
Springdale	529	530	541	546	546	548	557	571	593	609	15.1%	80	2.7%	16
Toquerville	1,370	1,374	1,383	1,397	1,403	1,439	1,481	1,536	1,615	1,667	21.7%	297	3.2%	52
Virgin	596	598	603	608	609	609	610	615	634	644	8.1%	48	1.6%	10
Washington	18,761	18,865	19,971	20,837	21,869	23,306	24,238	25,299	26,434	27,686	47.6%	8,925	4.7%	1,252
Balance of Washington County	6,988	6,965	7,037	7,110	7,133	7,176	7,226	7,367	7,502	7,570	8.3%	582	0.9%	68

Table 1.12: Total Population by City

(continued)

	2010 Census (April 1)	Population Estimate (July 1)									Change from 2010 Census to 2018		Change from 2017 to 2018	
		2010	2011	2012	2013	2014	2015	2016	2017	2018	Percent	Number	Percent	Number
Wayne County	2,778	2,772	2,742	2,704	2,712	2,696	2,691	2,674	2,721	2,690	-3.2%	-88	-1.1%	-31
Bicknell	327	343	339	334	335	331	329	325	329	327	0.0%	0	-0.6%	-2
Hanksville	219	218	217	215	214	213	213	215	219	217	-0.9%	-2	-0.9%	-2
Loa	572	616	610	600	603	594	588	580	585	578	1.0%	6	-1.2%	-7
Lyman	258	257	255	252	252	252	252	251	257	253	-1.9%	-5	-1.6%	-4
Torrey	182	245	242	238	239	239	240	238	243	240	31.9%	58	-1.2%	-3
Balance of Wayne County	1,220	1,093	1,079	1,065	1,069	1,067	1,069	1,065	1,088	1,075	-11.9%	-145	-1.2%	-13
Weber County	231,236	232,139	233,832	236,264	238,093	240,212	242,963	247,253	251,866	256,359	10.9%	25,123	1.8%	4,493
Farr West	5,928	5,983	6,069	6,175	6,260	6,432	6,699	6,868	7,000	7,206	21.6%	1,278	2.9%	206
Harrisville	5,567	5,616	5,710	5,788	5,870	6,027	6,165	6,336	6,535	6,696	20.3%	1,129	2.5%	161
Hooper	7,218	7,274	7,482	7,655	7,884	8,039	8,173	8,435	8,673	8,938	23.8%	1,720	3.1%	265
Huntsville	608	618	619	622	630	628	634	638	638	638	4.9%	30	0.0%	0
Marriott-Slaterville	1,701	1,699	1,707	1,717	1,725	1,733	1,743	1,754	1,785	1,847	8.6%	146	3.5%	62
North Ogden	17,357	17,474	17,590	17,772	17,988	18,166	18,356	18,680	19,483	20,009	15.3%	2,652	2.7%	526
Ogden	82,825	83,051	83,251	83,820	84,130	84,360	85,253	86,704	87,072	87,325	5.4%	4,500	0.3%	253
Plain City	5,476	5,518	5,685	5,875	6,022	6,193	6,267	6,466	6,759	7,120	30.0%	1,644	5.3%	361
Pleasant View	7,979	7,999	8,133	8,318	8,596	8,932	9,303	9,783	10,284	10,734	34.5%	2,755	4.4%	450
Riverdale	8,426	8,503	8,535	8,599	8,630	8,656	8,681	8,742	8,761	8,785	4.3%	359	0.3%	24
Roy	36,884	36,995	37,215	37,506	37,648	37,792	37,861	38,142	38,645	38,773	5.1%	1,889	0.3%	128
South Ogden	16,532	16,601	16,633	16,716	16,743	16,817	16,866	17,018	17,108	17,146	3.7%	614	0.2%	38
Uintah	1,322	1,318	1,320	1,325	1,330	1,328	1,333	1,341	1,341	1,342	1.5%	20	0.1%	1
Washington Terrace	9,067	9,041	9,048	9,082	9,087	9,100	9,108	9,157	9,157	9,187	1.3%	120	0.3%	30
West Haven	10,272	10,425	10,718	11,059	11,246	11,580	11,890	12,311	13,533	15,239	48.4%	4,967	12.6%	1,706
Balance of Weber County	14,074	14,024	14,117	14,235	14,304	14,429	14,631	14,878	15,092	15,374	9.2%	1,300	1.9%	282

A - An "A" in the 2010 Census field indicates a locality that was formed or incorporated after the 2010 Census
Source: U.S. Census Bureau, Population Division, Vintage 2019 Estimates

Table 1.13: Utah Demographic Projections by Race and Ethnicity

Year	Total	Race Alone (Not Hispanic or Latino)												Hispanic or Latino Origin (of any race)	
		White		Black/ African American		American Indian and Alaska Native		Asian		Native Hawaiian and Other Pacific Islander		Two or More Races (Not Hispanic or Latino)			
		Estimate	Share	Estimate	Share	Estimate	Share	Estimate	Share	Estimate	Share	Estimate	Share	Estimate	Share
2020	3,325,425	2,584,091	77.7%	38,639	1.2%	31,648	1.0%	83,583	2.5%	32,739	1.0%	72,361	2.2%	482,363	14.5%
2021	3,389,467	2,623,776	77.4%	40,114	1.2%	32,218	1.0%	86,429	2.5%	33,643	1.0%	75,493	2.2%	497,794	14.7%
2022	3,449,985	2,660,341	77.1%	41,579	1.2%	32,753	0.9%	89,229	2.6%	34,519	1.0%	78,639	2.3%	512,926	14.9%
2023	3,507,364	2,694,104	76.8%	43,035	1.2%	33,258	0.9%	91,989	2.6%	35,371	1.0%	81,805	2.3%	527,803	15.0%
2024	3,562,226	2,725,561	76.5%	44,488	1.2%	33,738	0.9%	94,725	2.7%	36,203	1.0%	85,003	2.4%	542,508	15.2%
2025	3,615,036	2,755,075	76.2%	45,943	1.3%	34,198	0.9%	97,450	2.7%	37,020	1.0%	88,242	2.4%	557,107	15.4%
2026	3,669,342	2,785,324	75.9%	47,445	1.3%	34,671	0.9%	100,267	2.7%	37,857	1.0%	91,610	2.5%	572,169	15.6%
2027	3,723,441	2,815,007	75.6%	48,972	1.3%	35,141	0.9%	103,115	2.8%	38,694	1.0%	95,065	2.6%	587,448	15.8%
2028	3,778,152	2,844,736	75.3%	50,535	1.3%	35,614	0.9%	106,016	2.8%	39,542	1.0%	98,630	2.6%	603,079	16.0%
2029	3,833,308	2,874,374	75.0%	52,134	1.4%	36,090	0.9%	108,966	2.8%	40,399	1.1%	102,304	2.7%	619,041	16.1%
2030	3,889,310	2,904,211	74.7%	53,773	1.4%	36,572	0.9%	111,977	2.9%	41,272	1.1%	106,101	2.7%	635,405	16.3%
2031	3,946,122	2,934,210	74.4%	55,454	1.4%	37,059	0.9%	115,049	2.9%	42,157	1.1%	110,021	2.8%	652,172	16.5%
2032	4,004,069	2,964,602	74.0%	57,181	1.4%	37,554	0.9%	118,192	3.0%	43,061	1.1%	114,079	2.8%	669,399	16.7%
2033	4,062,343	2,994,778	73.7%	58,946	1.5%	38,050	0.9%	121,384	3.0%	43,974	1.1%	118,255	2.9%	686,955	16.9%
2034	4,120,490	3,024,402	73.4%	60,742	1.5%	38,543	0.9%	124,611	3.0%	44,894	1.1%	122,539	3.0%	704,761	17.1%
2035	4,178,317	3,053,334	73.1%	62,566	1.5%	39,029	0.9%	127,866	3.1%	45,817	1.1%	126,929	3.0%	722,775	17.3%
2036	4,235,865	3,081,616	72.8%	64,422	1.5%	39,511	0.9%	131,152	3.1%	46,743	1.1%	131,430	3.1%	740,991	17.5%
2037	4,293,208	3,109,308	72.4%	66,310	1.5%	39,988	0.9%	134,469	3.1%	47,676	1.1%	136,047	3.2%	759,410	17.7%
2038	4,350,268	3,136,365	72.1%	68,230	1.6%	40,459	0.9%	137,814	3.2%	48,612	1.1%	140,781	3.2%	778,006	17.9%
2039	4,407,155	3,162,882	71.8%	70,185	1.6%	40,926	0.9%	141,190	3.2%	49,553	1.1%	145,637	3.3%	796,781	18.1%
2040	4,463,950	3,188,934	71.4%	72,176	1.6%	41,390	0.9%	144,598	3.2%	50,496	1.1%	150,620	3.4%	815,736	18.3%
2041	4,520,678	3,214,551	71.1%	74,204	1.6%	41,850	0.9%	148,038	3.3%	51,445	1.1%	155,732	3.4%	834,858	18.5%
2042	4,577,247	3,239,686	70.8%	76,267	1.7%	42,305	0.9%	151,505	3.3%	52,396	1.1%	160,972	3.5%	854,116	18.7%
2043	4,633,568	3,264,294	70.4%	78,365	1.7%	42,755	0.9%	154,995	3.3%	53,349	1.2%	166,338	3.6%	873,473	18.9%
2044	4,689,532	3,288,321	70.1%	80,493	1.7%	43,197	0.9%	158,503	3.4%	54,300	1.2%	171,829	3.7%	892,889	19.0%
2045	4,745,057	3,311,731	69.8%	82,652	1.7%	43,631	0.9%	162,023	3.4%	55,250	1.2%	177,441	3.7%	912,330	19.2%
2046	4,800,120	3,334,533	69.5%	84,840	1.8%	44,057	0.9%	165,552	3.4%	56,192	1.2%	183,174	3.8%	931,771	19.4%
2047	4,854,748	3,356,761	69.1%	87,057	1.8%	44,474	0.9%	169,089	3.5%	57,131	1.2%	189,030	3.9%	951,206	19.6%
2048	4,909,089	3,378,535	68.8%	89,306	1.8%	44,884	0.9%	172,637	3.5%	58,066	1.2%	195,013	4.0%	970,648	19.8%
2049	4,963,211	3,399,922	68.5%	91,586	1.8%	45,286	0.9%	176,196	3.6%	58,994	1.2%	201,126	4.1%	990,100	19.9%
2050	5,017,232	3,421,016	68.2%	93,900	1.9%	45,683	0.9%	179,769	3.6%	59,920	1.2%	207,372	4.1%	1,009,572	20.1%
2051	5,071,236	3,441,888	67.9%	96,249	1.9%	46,074	0.9%	183,354	3.6%	60,843	1.2%	213,753	4.2%	1,029,075	20.3%
2052	5,125,126	3,462,482	67.6%	98,630	1.9%	46,459	0.9%	186,948	3.6%	61,761	1.2%	220,262	4.3%	1,048,584	20.5%
2053	5,178,833	3,482,762	67.2%	101,043	2.0%	46,836	0.9%	190,545	3.7%	62,672	1.2%	226,895	4.4%	1,068,081	20.6%
2054	5,232,327	3,502,715	66.9%	103,485	2.0%	47,206	0.9%	194,141	3.7%	63,578	1.2%	233,646	4.5%	1,087,556	20.8%
2055	5,285,767	3,522,454	66.6%	105,961	2.0%	47,570	0.9%	197,742	3.7%	64,476	1.2%	240,523	4.6%	1,107,042	20.9%
2056	5,339,307	3,542,085	66.3%	108,472	2.0%	47,928	0.9%	201,351	3.8%	65,373	1.2%	247,527	4.6%	1,126,571	21.1%
2057	5,393,004	3,561,647	66.0%	111,020	2.1%	48,283	0.9%	204,970	3.8%	66,266	1.2%	254,662	4.7%	1,146,155	21.3%
2058	5,446,925	3,581,183	65.7%	113,608	2.1%	48,633	0.9%	208,601	3.8%	67,160	1.2%	261,930	4.8%	1,165,810	21.4%
2059	5,501,088	3,600,706	65.5%	116,234	2.1%	48,980	0.9%	212,243	3.9%	68,052	1.2%	269,331	4.9%	1,185,543	21.6%
2060	5,555,423	3,620,164	65.2%	118,900	2.1%	49,321	0.9%	215,894	3.9%	68,941	1.2%	276,862	5.0%	1,205,341	21.7%
2061	5,609,943	3,655,691	65.2%	120,067	2.1%	49,805	0.9%	218,012	3.9%	69,617	1.2%	279,579	5.0%	1,217,170	21.7%
2062	5,664,555	3,691,280	65.2%	121,236	2.1%	50,290	0.9%	220,135	3.9%	70,295	1.2%	282,301	5.0%	1,229,019	21.7%
2063	5,719,145	3,726,853	65.2%	122,404	2.1%	50,775	0.9%	222,256	3.9%	70,972	1.2%	285,021	5.0%	1,240,863	21.7%
2064	5,773,599	3,762,338	65.2%	123,569	2.1%	51,258	0.9%	224,372	3.9%	71,648	1.2%	287,735	5.0%	1,252,678	21.7%
2065	5,827,810	3,797,664	65.2%	124,730	2.1%	51,740	0.9%	226,479	3.9%	72,321	1.2%	290,437	5.0%	1,264,440	21.7%

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

Measuring Economic Diversity

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DJ Benway, Kem C. Gardner Policy Institute

HACHMAN OVERVIEW

The Hachman Index measures economic diversity. Using indicators such as gross domestic product (GDP) or employment, the index measures the mix of industries present in a particular region relative to a (well-diversified) reference region. Hachman Index scores are normalized from 0 to 100. A higher score indicates more economic diversity, while a lower score indicates less economic diversity. The Hachman Index is often applied at the national level, allowing for comparison between individual states. With reliable data, the index may also be applied to measure industrial distribution across counties. This brief examines the results of a Hachman Index analysis at the state and county level for 2018.

Utah's Midsized Economy is the Most Diverse

Utah is a leader among U.S. states for industrial diversity. A Hachman Index analysis using 2018 GDP data reported by the Bureau of Economic Analysis and aggregated to the two-digit NAICS code, reveals that Utah's industrial distribution is very similar to that of the United Sates. Utah barely scores above Missouri (see Figure 1). Arizona ranks third, scoring 1.1 points below Utah. Overall, six states (Utah, Missouri, Arizona, Georgia, Pennsylvania, and Illinois) have index scores higher than 95 (see Table 1). As the Hachman Index is a relative measure, it is not definitive that any one of these states is significantly more diverse than another.[1]

Utah leads the West for industrial diversity. Arizona, Colorado, and California all have larger economies than Utah, but have lower Hachman Index scores.[2] States with similar-sized economies include Iowa, Nevada, Kansas, and Oklahoma.[3] Of these, only Kansas has an index score above 90, indicating a very diverse economy. Kansas scores 92.4, Iowa 75.8, Nevada 67.5, and Oklahoma the lowest at 47.8. Despite Utah's midsized economy (31st largest), its industrial composition is more diverse than even the largest states.

Urban Counties More Diverse, Rural Counties More Specialized

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

Most of the counties bordering Salt Lake have relatively diverse economies. Davis, Utah, Tooele, and Wasatch all have index scores above 70, ranking in the top 10 most diverse counties (see Table 2). A notable exception is Summit County, which has high employment in arts, entertainment, and recreation and accommodations and food services, the result of a tourism-based economy centered on Park City.[6] Another exception is Morgan County, which has the highest concentration of employment in construction. In counties such as Morgan, with small populations, just a few large employers can have an outsized effect on the counties' overall employment mix.

Duchesne, Emery, and Uintah are the least economically diverse counties. In Uintah and Duchesne the low index scores are a result of a heavy concentration in mining, quarrying, and oil and gas extraction employment.[7] These counties have a competitive advantage in the extractive industries due to their natural resources, which are geographically dependent and not found in every county. Emery's highest concentration is in utilities, a direct result of the existence of two power plants. Similarly, like Morgan and Summit counties, all three

have relatively small populations so just a few large employers can have a significant effect on their industrial composition.

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

Calculating the Hachman Index

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

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

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

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

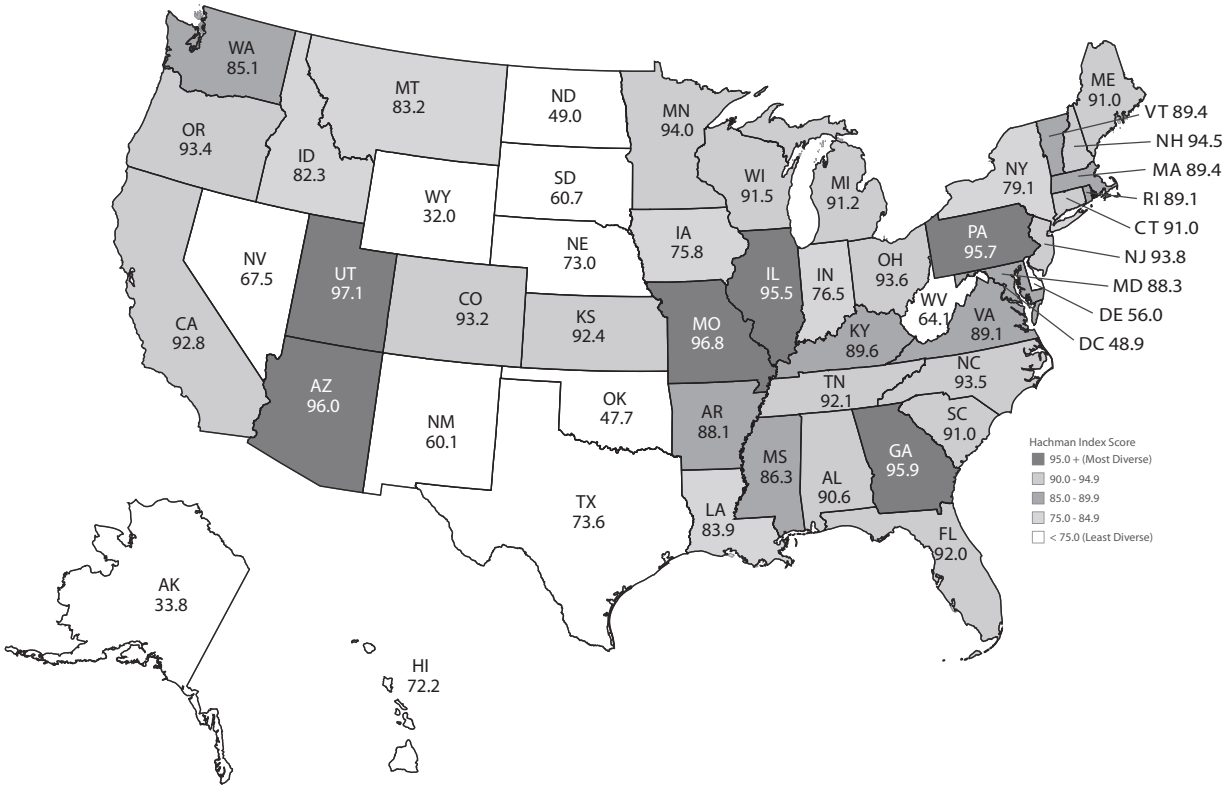
A Hachman Index score ranges from 0 to 100. A higher score indicates that the subject area's industrial distribution more closely resembles that of the reference geography, and is therefore diverse. A lower score indicates a region is less diverse than the reference area and more concentrated in fewer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

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

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

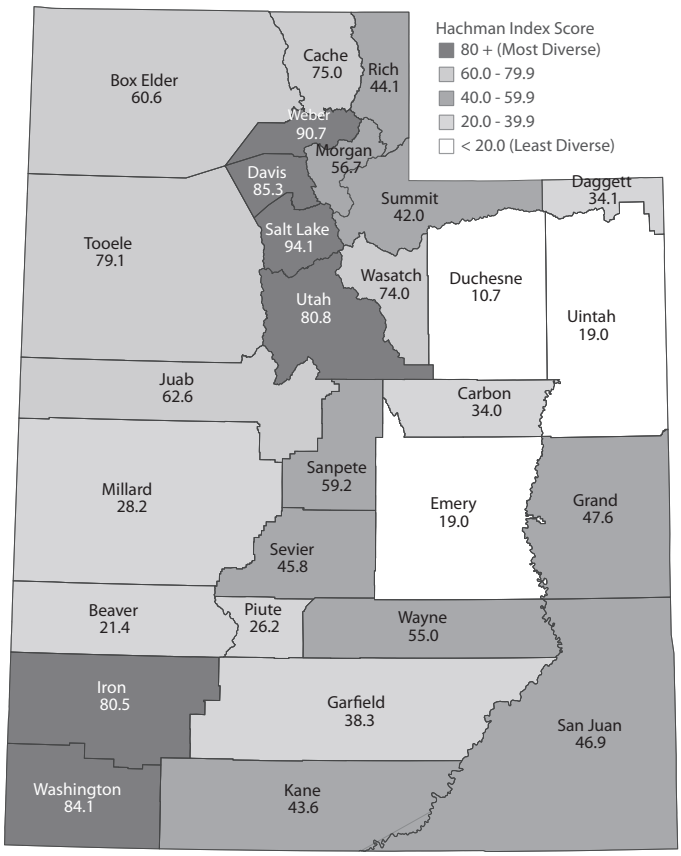
The Hachman Index is also affected by the measures used. The value of the Hachman Index will be affected if broader measures are used. For example, an index calculated from employment by industry will behave differently over time from one calculated from GDP, due to changes in labor productivity that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

Figure 2.1: Hachman Index for States, 2018



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

Figure 2.2: Hachman Index for Utah Counties, 2018



Source: Gardner Policy Institute analysis of Bureau of Labor Statistics (United States) and Utah Department of Workforce Services (Utah counties) employment data

Table 2:1: Hachman Index Scores for the States, 2018

State	Hachman Index
Utah	97.1
Missouri	96.8
Arizona	96.0
Georgia	95.9
Pennsylvania	95.7
Illinois	95.5
New Hampshire	94.5
Minnesota	94.0
New Jersey	93.8
Ohio	93.6
North Carolina	93.5
Oregon	93.4
Colorado	93.2
California	92.8
Kansas	92.4
Tennessee	92.1
Florida	92.0

State	Hachman Index
Wisconsin	91.0
Michigan	90.7
Maine	90.3
Connecticut	90.0
South Carolina	89.6
Alabama	89.5
Kentucky	89.3
Massachusetts	89.2
Vermont	89.2
Rhode Island	88.7
Virginia	88.2
Maryland	87.8
Arkansas	86.6
Mississippi	86.3
Washington	83.9
Louisiana	82.8
Montana	82.1

State	Hachman Index
Idaho	82.3
New York	79.1
Indiana	76.5
Iowa	75.8
Texas	73.6
Nebraska	73.0
Hawaii	72.2
Nevada	67.5
West Virginia	64.1
South Dakota	60.7
New Mexico	60.1
Delaware	56.0
North Dakota	49.0
District of Columbia	48.9
Oklahoma	47.7
Alaska	33.8
Wyoming	32.0

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

Table 2:2: Hachman Index Scores for Utah Counties, 2018

County	Hachman Index
Salt Lake	94.1
Weber	90.7
Davis	85.3
Washington	84.1
Utah	80.8
Iron	80.5
Tooele	79.1
Cache	75.0
Wasatch	74.0
Juab	62.6

County	Hachman Index
Box Elder	60.6
Sanpete	59.2
Morgan	56.7
Wayne	55.0
Grand	47.6
San Juan	46.9
Sevier	45.8
Rich	44.1
Kane	43.6
Summit	42.0

County	Hachman Index
Garfield	38.3
Daggett	34.1
Carbon	34.0
Millard	28.2
Piute	26.2
Beaver	21.4
Uintah	19.0
Emery	19.0
Duchesne	10.7

Source: Gardner Policy Institute analysis of Bureau of Labor Statistics (United States) and Utah Department of Workforce Services (Utah counties) employment data

1 The variation among the top five state scores is 1.6 points. The Hachman Index is not an exact measure and small differences are not definitive. When comparing state scores, the exact score is less important than the rank and size of the variation in scores relative to other states.
2 When ranking state economies by size using total GDP, California is the largest in the nation, Colorado ranks 16th, and Arizona ranks 20th. Utah ranks as the 31st largest state economy.
3 When ranking the state economies by size using total GDP, Oklahoma (29th) and Iowa (30th) rank just larger than Utah, and Nevada (32nd) and Kansas (33rd) rank just smaller.
4 Emily Harris, M.S., 2018, "State and County Population Estimates for Utah: 2018," Kem C. Gardner Policy Institute.
5 *Ibid*.
6 This concentration is measured by the comparison of the location quotients of each employment sector in the county. Arts, entertainment, and recreation ranks first, with a location quotient of 8.1, followed by real estate and rental and leasing (3.1), and accommodation and food services (2.4).
7 Duchesne has the highest location quotient of all counties in the state at 42.8, followed by Uintah at 30. The next highest is Carbon at 20, all well above other counties in the state.
8 A location quotient measures the relative concentration of an industry in one area compared with another. The Bureau of Labor Statistics defines it as a "ratio that compares the concentration of a resource or activity, such as employment, in a defined area to that of a larger area or base. For example, location quotients can be used to compare state employment by industry to that of the nation." It is calculated by dividing an industry's share of the total (employment, GDP, etc.) in the study region by its share in the reference region.
9 Hachman, 2002.
10 1995 *Economic Report to the Governor*, pages 207–214.

Employment, Wages, and Labor Force

3

Mark Knold, Utah Department of Workforce Services

2019 OVERVIEW

The decade's concluding year caps a chronicle centered on Utah's resilient rebound from the Post Great Recession's economic low point—the decade's starting position. By 2012, Utah's characteristic employment growth returned and has since featured yearly at-or-above-average (3.0%) employment gains. This vibrant economic story continued into 2019, setting the stage for an encouraging transition into the next decade.

The 2019 data is still accumulating, but the year's employment gains are estimated to again measure around 3.0%. The seventh year of strong employment growth coupled with an already tight labor market further pushed down the unemployment rate to 2.4% by the year's latter months—a rate matching Utah's historical low.

Long-running economic expansions tend to lift all ships. It is no surprise that possessing higher education increases ones employment outlook. Workers with the highest level of educational attainment encounter the lowest unemployment rates—even in the worst of times. It is the lower education levels that undergo the most unemployment volatility, often being slowly and sometimes stubbornly reabsorbed by the economy. Utah's strong seven-year employment gains have shrunk the unemployment disparity between the highest and lowest education segments to the narrowest gap since these data points were made available in 2005. This melding shows itself through a 2.4% unemployment rate in the last months of 2019.

A textbook low-unemployment outcome featuring full employment across all education tiers, is strong wage growth. A lack of formidable wage gains throughout much of the Great Recession's rebound was the recovery's missing potency. But within the past two years, Utah's wage gains have been vigorous. The 2018 gains reached 4.2% (helped along by national tax stimulus), and 2019 should follow with another 3.7% increase. These gains can anchor their strength in all education tiers attaining full employment.

2020 OUTLOOK

Two variables dominate the Utah employment outlook for 2020. They are labor in-migration, and the health of the U.S. economy. Both do not hold equal sway, but both have strong enough influence to potentially amend Utah's current economic trajectory.

The lesser influence is labor in-migration. It is currently sustaining Utah's robust economic growth. With the unemployment rate matching its lowest measure, it is notable that Utah finds enough labor to maintain its long-run average employment growth rates. Each year a sizeable number of Utah residents age into the labor force, yet that is not enough to maintain the expansion's current pace given historically low indigenous unemployment. Therefore, in-migration is the stimulus sustaining the current pace. Factors influencing migration decisions, like housing prices and quality-of-life, receive added attention when observing Utah's 2020 economy.

The larger pressure is the United States economy. The Utah economy runs parallel with the United States economy. It is rare for Utah's economic statistics to move independently of the United States. Where Utah's uniqueness lies is its parallel movements are traditionally at a higher level. Utah's ebbs and flows mirror the national ebbs and flows, but like a sturdy ship, Utah generally rides the top of those fluctuating waves.

With that relationship, it is prudent to assess the national economy expectations. Current blue chip prognosticator dialogue falls on the slowing side of the ledger, and if this were to transpire, then the Utah economy should also see tempering in its job-growth rate. Therefore, Utah's evaluators lowering the state's forecasted employment growth to around 2.7% for 2020. Even then, unemployment would not be expected to rise much if at all in 2020.

Labor Force Participation Rate

Recessions impact labor markets. Rising unemployment is a normal outcome. This usually expresses itself as a temporary or cyclical tendency, as a return to a healthy business cycle finds workers re-employed and the recession's impact mitigated.

But the Great Recession initiated a permanent or structural impact upon Utah's, and the nation's, labor force participation rates. Both are noticeably lower than long-held, pre-recession participation.

The labor force stipulation is anyone 16 and older. Not everyone in this assemblage desires to work or look for work (labor force participation), so the participation rate will be some percentage below 100%. For 30 years prior to the Great Recession, Utah's labor force participation hovered around 71.0%, and the nations' around 66.0%.

After the Great Recession's onset, Utah's participation rapidly declined to around 68.0% where it remains today (U.S. at 63.0%). Given nearly ten years since this decline and the Utah economy producing many new jobs and re-employing many workers since, it seems reasonable concluding this 68.0% level is the new norm—that a structural downward shift has occurred.

A question arises as to whether the Great Recession caused this structural change or was some other factor at work causing this decline. The answer is both, but more the latter than the former.

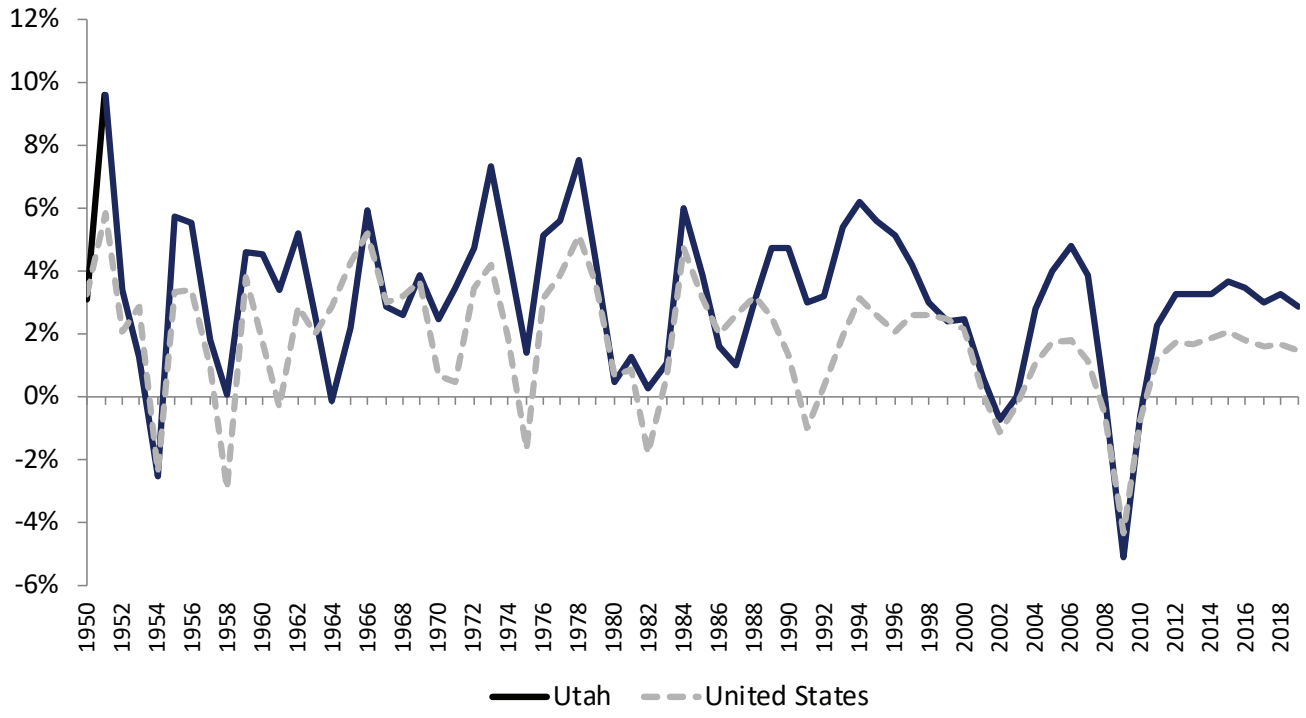
Although Utah has the lowest median age of any state, its median is trending upward. The baby boom generation is not the dominant cohort in Utah, but it's large enough to cause the proportion of Utah's 65-and-older population within the labor force class to rise from 11.0% ten years ago to 16.0% now.

The actual labor force is those who are active in the job market, either working or looking for work. For natural reasons, there are two age segments within the 16-and-older population that are not vigorously active in either working or looking for work. They are the 16 to 19 year olds (still educating), and the 65 and older (retiring). If a higher percentage of the labor force population ages into the less-active 65-and-older category (11% to 16%), then the actual labor force participation rate is destined to decline.

To measure aging's anticipated outcome by holding pre-recession age-group participation rates constant as population ages between 2007 and 2019, it is calculated that the best the Utah labor force participation rate could be by 2019 is just below 69.0%. Utah's decline from pre-2007's 71.0% to today's 68.5% is largely a natural consequence from labor-force aging.

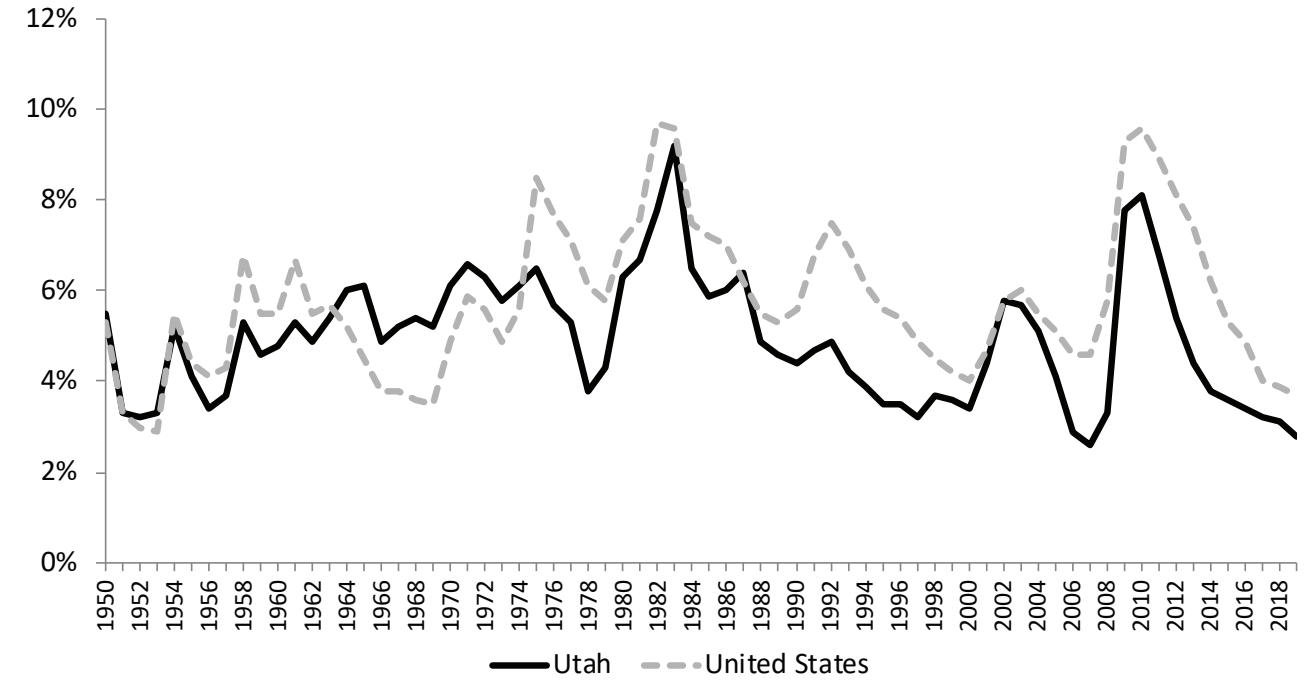
The Great Recession's impact accelerated an otherwise gradual, ten-year transition by front-loading it into a three-year window (2008 to 2011). Between 2008 and 2017, the Utah labor force was not engaged to its full potential. This was a cyclical effect. But within the last two years, the Utah labor force now appears fully engaged at its new, age-modified, potential around 69.0%. The Great Recession's cyclical effect has run its course, but a natural structural-shift remains.

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



Source: Utah Department of Workforce Services

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

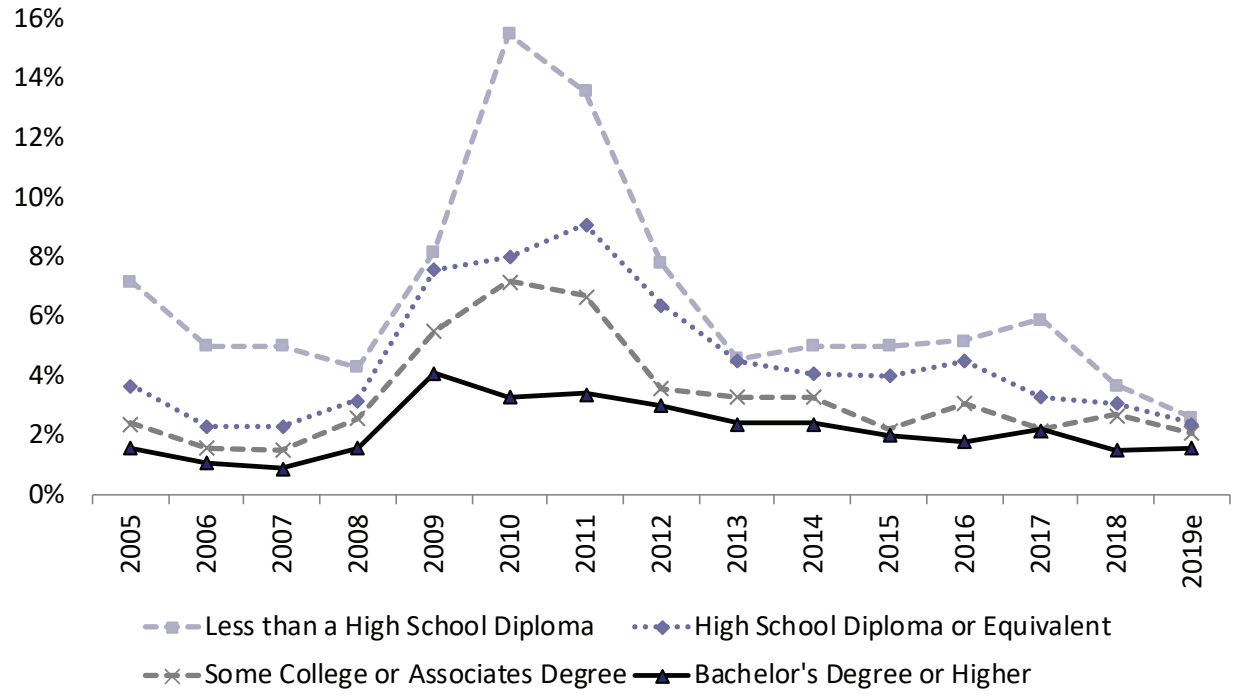


Source: Utah Department of Workforce Services

Figure 3.3: Annual Average Unemployment Rate and Wage Growth

Source: Utah Department of Workforce Services

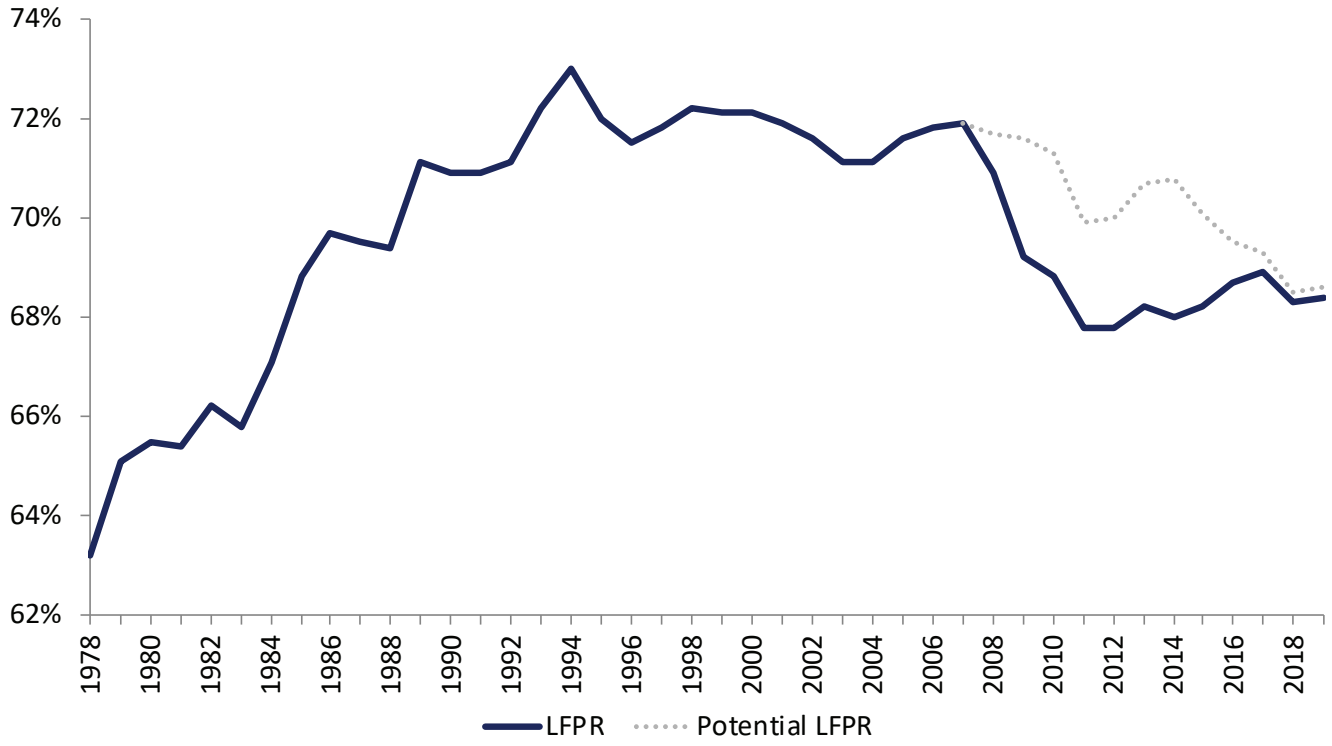
Figure 3.4: Unemployment Rates by Educational Attainment



Note: e=estimate

Source: Utah Department of Workforce Services

Figure 3.5: Utah Labor Force Participation Rate



Source: Utah Department of Workforce Services

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

Year	Nonfarm Employment	Percent Change	Absolute Change	Unemployment Rate	Utah Labor Force Participation Rate	U.S. Labor Force Participation Rate
1950	189,153	3.1	5,653	5.5		
1951	207,386	9.6	18,233	3.3		
1952	214,409	3.4	7,023	3.2		
1953	217,194	1.3	2,785	3.3		
1954	211,864	-2.5	-5,330	5.2		
1955	224,007	5.7	12,143	4.1		
1956	236,225	5.5	12,218	3.4		
1957	240,577	1.8	4,352	3.7		
1958	240,816	0.1	239	5.3		
1959	251,940	4.6	11,124	4.6		
1960	263,307	4.5	11,367	4.8		
1961	272,355	3.4	9,048	5.3		
1962	286,382	5.2	14,027	4.9		
1963	293,758	2.6	7,376	5.4		
1964	293,576	-0.1	-182	6.0		
1965	300,164	2.2	6,588	6.1		
1966	317,771	5.9	17,607	4.9		
1967	326,953	2.9	9,182	5.2		
1968	335,527	2.6	8,574	5.4		
1969	348,612	3.9	13,085	5.2		
1970	357,435	2.5	8,823	6.1		
1971	369,836	3.5	12,401	6.6		
1972	387,271	4.7	17,435	6.3		
1973	415,641	7.3	28,370	5.8		
1974	434,793	4.6	19,152	6.1		
1975	441,082	1.4	6,289	6.5		
1976	463,658	5.1	22,576	5.7	63.0	61.6
1977	489,580	5.6	25,922	5.3	63.0	62.3
1978	526,400	7.5	36,820	3.8	63.2	63.2
1979	549,242	4.3	22,842	4.3	65.1	63.7
1980	551,889	0.5	2,647	6.3	65.5	63.8
1981	559,184	1.3	7,295	6.7	65.4	63.9
1982	560,981	0.3	1,797	7.8	66.2	64.0
1983	566,991	1.1	6,010	9.2	65.8	64.0
1984	601,068	6.0	34,077	6.5	67.1	64.4
1985	624,387	3.9	23,319	5.9	68.8	64.8
1986	634,138	1.6	9,751	6.0	69.7	65.3
1987	640,298	1.0	6,160	6.4	69.5	65.6
1988	660,075	3.1	19,777	4.9	69.4	65.9
1989	691,244	4.7	31,169	4.6	71.1	66.5
1990	723,629	4.7	32,385	4.4	70.9	66.5
1991	745,202	3.0	21,573	4.7	70.9	66.2
1992	768,602	3.2	23,488	4.9	71.1	66.5
1993	809,731	5.4	41,129	4.2	72.2	66.3
1994	859,626	6.2	49,895	3.9	73.0	66.6
1995	907,886	5.6	48,260	3.5	72.0	66.6
1996	954,183	5.1	46,297	3.5	71.5	66.8
1997	993,999	4.2	39,816	3.2	71.8	67.1
1998	1,023,480	3.0	29,461	3.7	72.2	67.1
1999	1,048,498	2.4	25,018	3.6	72.1	67.1
2000	1,074,879	2.5	26,381	3.4	72.1	67.1
2001	1,081,685	0.6	6,806	4.4	71.9	66.8
2002	1,073,746	-0.7	-7,939	5.8	71.6	66.6
2003	1,074,131	0.0	385	5.7	71.1	66.2
2004	1,104,328	2.8	30,197	5.1	71.1	66.0
2005	1,148,320	4.0	43,992	4.1	71.6	66.0
2006	1,203,914	4.8	55,594	2.9	71.8	66.2
2007	1,251,282	3.9	47,368	2.6	71.9	66.1
2008	1,252,470	0.1	1,188	3.3	70.9	66.0
2009	1,188,736	-5.1	-63,734	7.8	69.2	65.4
2010	1,181,519	-0.6	-7,217	8.1	68.8	64.7
2011	1,208,650	2.3	27,131	6.8	67.8	64.1
2012	1,248,935	3.3	40,285	5.4	67.8	63.7
2013	1,290,523	3.3	41,588	4.4	68.2	63.3
2014	1,328,143	2.9	37,620	3.8	68.0	62.9
2015	1,377,744	3.7	49,601	3.6	68.2	62.7
2016	1,426,450	3.5	48,706	3.4	68.7	62.8
2017	1,469,157	3.0	42,707	3.3	68.9	62.9
2018	1,517,423	3.3	48,266	3.1	68.3	62.9
2019e	1,562,900	3.0	45,477	2.7	68.4	63.1
2020f	1,605,100	2.7	42,200	2.5	68.2	63.0

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

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

Indicator	2016	2017	2018	2019e	2020f	Annual Percent Change			
						2017	2018	2019e	2020f
Civilian Labor Force	1,506,239	1,548,263	1,572,136	1,619,200	1,664,400	2.8%	1.5%	3.0%	2.8%
Employed Persons	1,454,399	1,497,812	1,523,158	1,575,482	1,622,790	3.0%	1.7%	3.4%	3.0%
Unemployed Persons	51,840	50,450	48,978	43,718	41,610	-2.7%	-2.9%	-10.7%	-4.8%
Unemployment Rate	3.4%	3.3%	3.1%	2.7%	2.5%				
U.S. Rate	4.9%	4.4%	3.9%	3.7%	3.5%				
Total Nonfarm Jobs	1,426,381	1,469,125	1,517,423	1,562,900	1,605,100	3.0%	3.3%	3.0%	2.7%
Mining	8,494	8,618	9,470	9,666	9,895	1.5%	9.9%	2.1%	2.4%
Construction	91,537	97,495	104,339	108,800	111,811	6.5%	7.0%	4.3%	2.8%
Manufacturing	125,926	129,198	132,978	137,466	140,856	2.6%	2.9%	3.4%	2.5%
Trade, Trans., Utilities	271,433	278,526	286,343	292,569	300,372	2.6%	2.8%	2.2%	2.7%
Information	36,757	38,429	38,052	39,412	40,266	4.5%	-1.0%	3.6%	2.2%
Financial Activity	81,711	84,072	87,540	89,969	92,098	2.9%	4.1%	2.8%	2.4%
Professional & Business Services	202,175	206,987	217,555	225,768	233,829	2.4%	5.1%	3.8%	3.6%
Education & Health Services	190,935	198,251	203,495	209,549	215,348	3.8%	2.6%	3.0%	2.8%
Leisure & Hospitality	138,591	143,029	148,503	154,555	160,074	3.2%	3.8%	4.1%	3.6%
Other Services	39,405	40,209	41,253	42,356	43,444	2.0%	2.6%	2.7%	2.6%
Government	239,417	244,311	247,895	252,789	257,108	2.0%	1.5%	2.0%	1.7%
Goods-producing	225,957	235,311	246,787	255,933	262,562	4.1%	4.9%	3.7%	2.6%
Service-producing	1,200,424	1,233,814	1,270,636	1,306,967	1,342,538	2.8%	3.0%	2.9%	2.7%
Percent Service-producing	84.2%	84.0%	83.7%	83.6%	83.6%				
U.S. Nonfarm Job Growth %	1.7%	1.5%	1.7%	1.6%	1.2%				
Total Nonfarm Wages (thousands)	$63,419	$67,174	$72,277	$77,214	$82,867	5.9%	7.6%	6.8%	7.3%
Average Annual Wage	$44,461	$45,724	$47,631	$49,404	$51,627	2.8%	4.2%	3.7%	4.5%
Average Monthly Wage	$3,705	$3,810	$3,969	$4,117	$4,302				
Establishments (first quarter)	95,058	98,047	102,758	106,663	110,076				

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

Table 3.3: Utah's Largest Employers, Annual Average Employment 2018

Rank	Company Name	Industry	Employment Range
1	Intermountain Healthcare	Health Care	20,000 +
2	University of Utah (Including Hospital)	Higher Education	20,000 +
3	State of Utah	State Government	20,000 +
4	Brigham Young University	Higher Education	15,000-19,999
5	Wal-Mart Associates	Warehouse Clubs/Supercenters	15,000-19,999
6	Hill Air Force Base	Federal Government	10,000-14,999
7	Davis County School District	Public Education	7,000-9,999
8	Utah State University	Higher Education	7,000-9,999
9	Smith's Food and Drug Centers	Grocery Stores	7,000-9,999
10	Granite School District	Public Education	7,000-9,999
11	Alpine School District	Public Education	7,000-9,999
12	Jordan School District	Public Education	7,000-9,999
13	Salt Lake County	Local Government	7,000-9,999
14	Utah Valley University	Higher Education	5,000-6,999
15	U.S. Postal Service	Federal Government	5,000-6,999
16	U.S. Department of Treasury	Federal Government	5,000-6,999
17	The Canyons School District	Public Education	5,000-6,999
18	The Home Depot	Home Centers	5,000-6,999
19	Zions Bancorp	Banking	4,000-4,999
20	Delta Airlines	Air Transportation	4,000-4,999
21	Weber County School District	Public Education	4,000-4,999
22	United Parcel Service	Courier/Express Delivery Service	4,000-4,999
23	Vivint	Electrical Contractors	3,000-3,999
24	Autoliv	Motor Vehicle Equipment Manufacturing	3,000-3,999
25	ARUP Laboratories, Inc.	Medical Laboratory	3,000-3,999
26	ATK Launch Systems	Aerospace	3,000-3,999
27	Discover Products, Inc.	Consumer Loans	3,000-3,999
28	Wells Fargo Bank	Banking	3,000-3,999
29	Department of Veteran's Affairs	Federal Government	3,000-3,999
30	Salt Lake City School District	Public Education	3,000-3,999
31	Costco	Warehouse Clubs/Supercenters	3,000-3,999
32	Harmons	Grocery Stores	3,000-3,999
31	Nebo School District	Public Education	3,000-3,999
32	Washington County School District	Public Education	3,000-3,999
33	Weber State University	Higher Education	3,000-3,999
34	C.R. England Trucking	Truck Transportation	3,000-3,999
35	Salt Lake City Corporation	Local Government	3,000-3,999
36	L3 Technologies	Electronics Manufacturing	3,000-3,999
37	Salt Lake Community College	Higher Education	3,000-3,999
38	America First Credit Union	Banking	2,000-2,999
39	SkyWest Airlines	Air Transportation	2,000-2,999
40	Goldman Sachs	Banking/Investments	2,000-2,999
41	Utah Transit Authority	Public Transportation	2,000-2,999
42	Cache County School District	Public Education	2,000-2,999
43	Maverick Country Stores	Convenience Stores	2,000-2,999
44	Sizzling Platter, LLC (Sizzler & Little Caesar's)	Restaurants	2,000-2,999
45	Target Corporation	Supercenters	2,000-2,999
46	Lowe's Home Center	Home Centers	2,000-2,999
47	DoTERRA International	Direct Selling	2,000-2,999
48	JetBlue Airways Corporation	Air Transportation	2,000-2,999
49	R1 RMC	Financial Services	2,000-2,999

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

Personal Income

4

Robert Spendlove, Zions Bank
Joseph Mayans, Zions Bank

2019 OVERVIEW

Utah's total personal income in 2019 was an estimated $155.2 billion, a 6.0% increase from $146.4 billion in 2018. Utah's estimated 2019 per capita income was $48,332, up 4.3% from $46,320 in 2018. Both measures of estimated personal income growth in Utah were lower in 2019 than in 2018. In 2018, total personal income grew by 7.2% and per capita income grew by 5.3%.

Total Personal Income

Total personal income (TPI) is the sum of all individual personal income in a given region. There are three components of TPI: 1) net earnings by place of work, adjusted for place of residence; 2) property income, or income from dividends, interest, and rent; and 3) income from transfer receipts, which are benefits received from the government, including: Social Security, Medicare and Medicaid, and veteran's benefits. In 2018, Utah's TPI was $146.4 billion, and of that, net earnings by place of residence comprised the largest share (65.4%). This was followed by property income from dividends, interest, and rent (22.0%), and income from transfer receipts (12.6%).

While Utah's component share of net earnings, and property income from dividends, interest, and rent were similar to the national average, its income from transfer receipts was the lowest of any state. Only the District of Columbia had a smaller share of transfer receipt income (11.8%). The three states with the lowest share of transfer receipt income were Utah (12.6%), Colorado (12.9%), and Connecticut (13.0%). The states with the highest share were West Virginia (28.2%), Mississippi (25.9%), and Kentucky (23.8%).

In 2018, Utah's TPI rose 7.2% from $136.5 billion to $146.4 billion. The fastest growing component was income from dividends, interest, and rent, which grew 8.2% from $29.8 billion to $32.2 billion. Net earnings by place of residence rose 7.1% from $89.4 billion to $95.7 billion, and income from transfer receipts rose 6.3% from $17.4 billion to $18.5 billion.

The majority of earnings by place of work, which includes government social insurance, came from wages and salaries (72.1%), followed by supplements to wages and salaries (17.5%), and proprietors' income (10.4%). Utah's earnings by place of work came primarily from nonfarm earnings (99.7%), versus farm earnings (0.3%). This is roughly equivalent to the nonfarm/farm split for the United States (99.5% and 0.5%, respectively).

Of Utah's nonfarm earnings, 84.0% came from the private sector and 16.0% came from the public sector. Within the Utah private sector, the professional, scientific, and technical services sector (11.6%) was the largest source of earnings; followed by manufacturing (11.5%), and health care and social assistance (10.2%). At the national level, health care and social assistance accounted for the largest percentage of private-sector earnings (13.2%); followed by professional, scientific, and technical services (12.5%); and manufacturing (11.1%).

In 2018, all of Utah's broad private-industry classifications experienced growth in earnings. The mining, quarrying, and oil and gas extraction sector had the highest year-over-year earnings growth of 14.0%. Other industries experiencing high growth included professional, scientific, and technical services (12.8%), educational services (11.2%), and construction (9.2%).

Earnings in Utah's public sector, which includes federal civilians, military, and state and local employees, expanded by 5.1% in 2018.

Per Capita Personal Income

Per capita personal income is a region's total personal income divided by its total population. Personal income and per capita personal income data are reported quarterly by the U.S. Bureau of Economic Analysis. Utah's estimated 2019 per capita personal income was $48,332, up 4.3% from the 2018 level of $46,320. Utah's estimated 2019 per capita income was 85.7% of the national per capita income of $56,424.

In 2018, Utah's total personal income growth was the second highest in the nation, while its per capita personal income growth was the 15th highest. This dynamic of high personal income growth but lower per capita income growth has largely been driven by Utah's young demographic. While total personal income is expanding, per capita personal income is weighed on by many young individuals who are counted in the population but have not yet entered the workforce. As Utah's population continues to age, as is projected, the gap between personal income growth and per capita growth should continue to narrow.

Per Capita Personal Income by County

Utah experienced per capita personal income growth of 5.3% in 2018, which was higher than its 3.8% growth in 2017. Twenty-eight out of 29 counties experienced per capita personal income gains in 2018, versus 29 out of 29 counties in 2017. The only county to experience zero percent growth was Millard. Emery County experienced the strongest year-over-year growth (8.2%), while Grand (7.1%), Wayne (7.1%), Carbon (6.9%), and Sevier (6.8%) rounded out the top five counties for growth.

In 2018, Summit County's per capita personal income was the highest in Utah at $131,606, nearly three times the state average of $46,320. Summit was also the only county with a per capita income that exceeded the national average of $54,465. Grand ($54,010), Wasatch ($53,285), Salt Lake ($52,639), and Morgan ($52,426), were the only other counties to outpace the statewide per capita income average.

2020 OUTLOOK

Utah's total personal income in 2019 was estimated to have grown 6.0%; this is down from 7.2% in 2018, but higher than the estimated national average of 4.5%. The state's estimated 2019 per capita personal income growth of 4.3% was also lower than the state's growth in 2018, and equal to the growth nationwide.

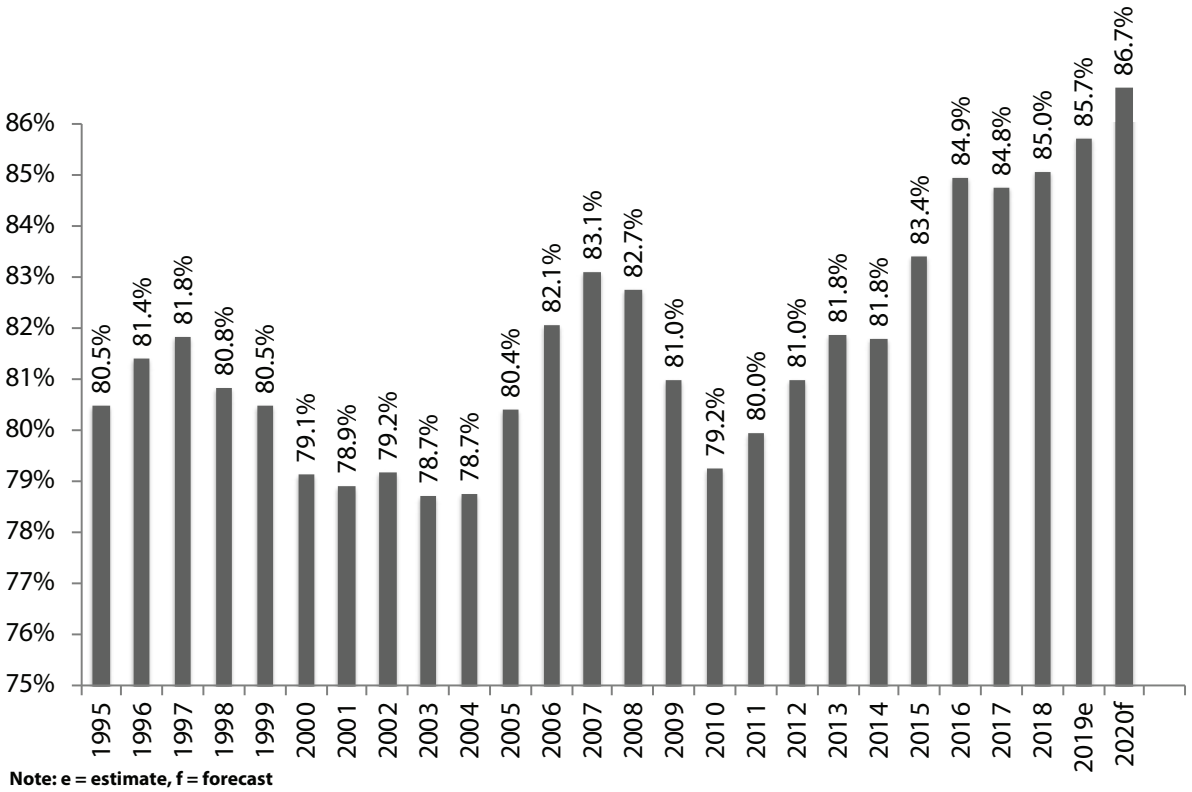
In 2020, Utah looks to remain one of the top labor markets and centers for growth in the nation. The state has consistently experienced some of the fastest employment growth in the country throughout 2018 and 2019, and this trend is likely to continue into the foreseeable future. With Utah's unemployment rate sitting well below 3.0% and at all-time lows, businesses will face increased competition for a qualified workforce. This dynamic should encourage companies to increase wages and benefits, and put upward pressure on personal income growth.

While personal income is projected to expand in Utah in 2020, there are some headwinds. The ongoing trade war with China and rising global uncertainty will likely continue to constrain business investment and curtail job creation. Overall economic activity is slowing, and it remains to be seen if the Federal Reserve has the policy tools to combat a more severe slowdown.

One sector to watch in 2020 is manufacturing, as it is the second largest sector for earnings in Utah and the third largest for the United States. At the national level, employment growth in manufacturing has slowed substantially since the start of the trade war, while it has remained relatively buoyant in Utah. If growth in Utah's manufacturing sector converges toward the national trend, personal income growth could be hampered.

With headwinds in mind, preliminary forecasts for Utah in 2020 predict the state's personal income growth will slightly outpace its 2019 level and sit comfortably above the national average.

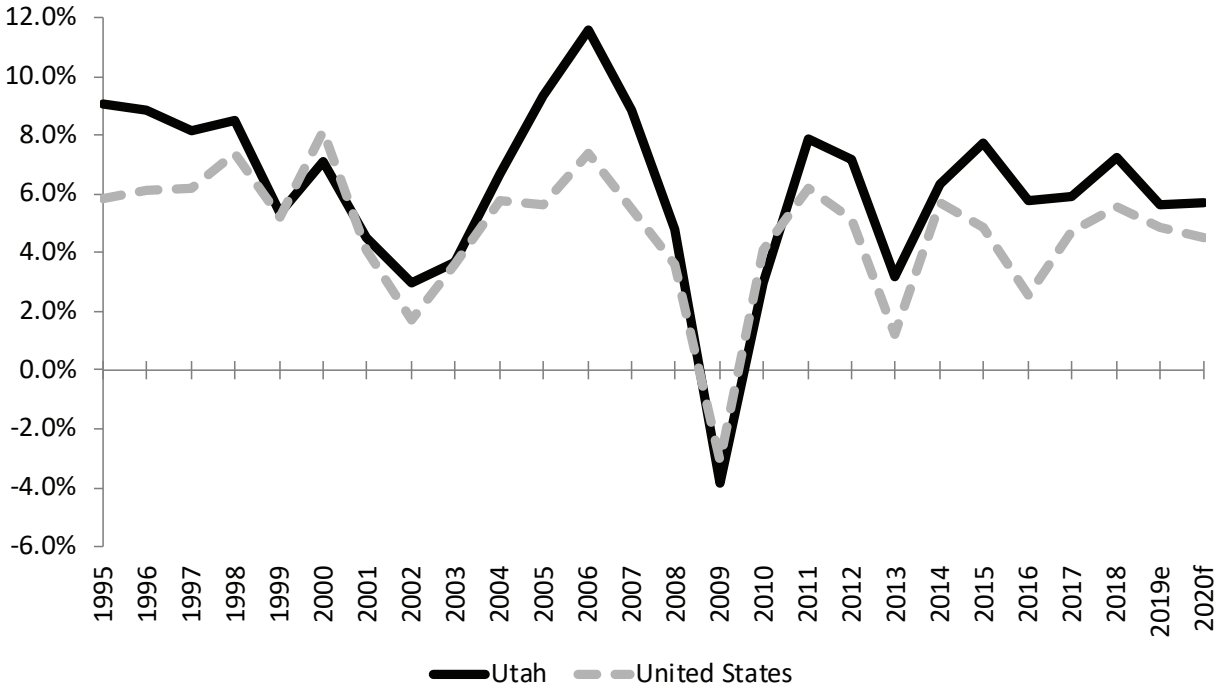
Figure 4.1: Utah Per Capita Income as Percent of U.S. Per Capita Income



Note: e = estimate, f = forecast

Source: U.S. Bureau of Economic Analysis and Utah Revenue Assumptions Working Group

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



Note: e = estimate, f = forecast

Source: U.S. Bureau of Economic Analysis and Utah Revenue Assumptions Working Group

Table 4.1: Total and Per Capita Personal Income

Year	Total Personal Income (Millions of Dollars)			Annual Growth Rates		Per Capita Personal Income (Dollars)		
	Utah	United States	Utah as % of U.S.	Utah	United States	Utah	United States	Utah as % of U.S.
1970	$3,791	$865,045	0.44%	11.4%	8.1%	$3,558	$4,245	83.8%
1971	4,243	932,785	0.45%	11.9%	7.8%	3,855	4,510	85.5%
1972	4,741	1,024,456	0.46%	11.7%	9.8%	4,179	4,895	85.4%
1973	5,283	1,140,780	0.46%	11.4%	11.4%	4,520	5,398	83.7%
1974	5,910	1,251,819	0.47%	11.9%	9.7%	4,930	5,868	84.0%
1975	6,591	1,369,389	0.48%	11.5%	9.4%	5,341	6,356	84.0%
1976	7,464	1,502,647	0.50%	13.2%	9.7%	5,866	6,907	84.9%
1977	8,441	1,659,236	0.51%	13.1%	10.4%	6,412	7,550	84.9%
1978	9,712	1,863,721	0.52%	15.1%	12.3%	7,119	8,391	84.8%
1979	10,972	2,082,670	0.53%	13.0%	11.7%	7,748	9,274	83.5%
1980	12,319	2,323,645	0.53%	12.3%	11.6%	8,366	10,226	81.8%
1981	13,893	2,605,118	0.53%	12.8%	12.1%	9,167	11,353	80.7%
1982	15,067	2,791,597	0.54%	8.5%	7.2%	9,669	12,050	80.2%
1983	16,135	2,981,057	0.54%	7.1%	6.8%	10,116	12,751	79.3%
1984	17,820	3,292,716	0.54%	10.4%	10.5%	10,984	13,963	78.7%
1985	19,070	3,524,881	0.54%	7.0%	7.1%	11,607	14,815	78.3%
1986	20,042	3,733,084	0.54%	5.1%	5.9%	12,053	15,546	77.5%
1987	20,995	3,961,598	0.53%	4.8%	6.1%	12,511	16,351	76.5%
1988	22,330	4,283,399	0.52%	6.4%	8.1%	13,218	17,519	75.4%
1989	23,967	4,625,573	0.52%	7.3%	8.0%	14,050	18,741	75.0%
1990	25,985	4,913,791	0.53%	8.4%	6.2%	15,010	19,685	76.3%
1991	27,864	5,084,914	0.55%	7.2%	3.5%	15,656	20,100	77.9%
1992	30,126	5,420,868	0.56%	8.1%	6.6%	16,401	21,133	77.6%
1993	32,491	5,657,948	0.57%	7.9%	4.4%	17,115	21,768	78.6%
1994	35,157	5,947,110	0.59%	8.2%	5.1%	17,933	22,602	79.3%
1995	38,308	6,291,376	0.61%	9.0%	5.8%	19,019	23,627	80.5%
1996	41,739	6,678,529	0.62%	9.0%	6.2%	20,183	24,791	81.4%
1997	45,125	7,092,489	0.64%	8.1%	6.2%	21,288	26,013	81.8%
1998	48,266	7,606,662	0.63%	7.0%	7.2%	22,284	27,575	80.8%
1999	50,851	8,001,868	0.64%	5.4%	5.2%	23,078	28,676	80.5%
2000	54,466	8,652,601	0.63%	7.1%	8.1%	24,266	30,665	79.1%
2001	56,933	9,005,595	0.63%	4.5%	4.1%	24,930	31,602	78.9%
2002	58,605	9,158,965	0.64%	2.9%	1.7%	25,208	31,843	79.2%
2003	60,749	9,487,549	0.64%	3.7%	3.6%	25,739	32,704	78.7%
2004	64,803	10,035,076	0.65%	6.7%	5.8%	26,984	34,272	78.7%
2005	70,862	10,598,246	0.67%	9.3%	5.6%	28,832	35,863	80.4%
2006	79,063	11,381,708	0.69%	11.6%	7.4%	31,306	38,145	82.1%
2007	86,046	12,007,782	0.72%	8.8%	5.5%	33,123	39,862	83.1%
2008	90,162	12,442,208	0.72%	4.8%	3.6%	33,857	40,916	82.7%
2009	86,696	12,059,109	0.72%	-3.8%	-3.1%	31,833	39,310	81.0%
2010	89,242	12,551,597	0.71%	2.9%	4.1%	32,156	40,577	79.2%
2011	96,245	13,326,770	0.72%	7.8%	6.2%	34,200	42,772	80.0%
2012	103,121	14,010,140	0.74%	7.1%	5.1%	36,139	44,636	81.0%
2013	106,427	14,181,095	0.75%	3.2%	1.2%	36,725	44,869	81.8%
2014	113,141	14,991,715	0.75%	6.3%	5.7%	38,517	47,087	81.8%
2015	121,885	15,717,760	0.78%	7.7%	4.8%	40,867	49,004	83.4%
2016	128,929	16,121,183	0.80%	5.8%	2.6%	42,375	49,900	84.9%
2017	136,544	16,878,796	0.81%	5.9%	4.7%	44,002	51,911	84.8%
2018	146,423	17,819,158	0.82%	7.2%	5.6%	46,320	54,465	85.0%
2019e	155,244	18,620,000	0.83%	6.0%	4.5%	48,332	56,424	85.7%
2020f	164,559	19,301,000	0.85%	6.0%	3.7%	50,432	58,135	86.7%

Note: All dollar amounts are in current dollars (not adjusted for inflation).
e = estimate
f = forecast
Source: U.S. Bureau of Economic Analysis and Utah Economic Council

Table 4.2: Per Capita Personal Income by County

County	2013	2014	2015	2016	2017	2018	2013-14	2014-15	2015-16	2016-17	2017-18
Utah	**$36,725**	**$38,517**	**$40,867**	**$42,375**	**$44,002**	**$46,320**	**4.9%**	**6.1%**	**3.7%**	**3.8%**	**5.3%**
Summit	93,811	97,737	112,627	117,039	123,795	131,606	4.2%	15.2%	3.9%	5.8%	6.3%
Grand	39,706	41,030	42,997	46,350	50,409	54,010	3.3%	4.8%	7.8%	8.8%	7.1%
Wasatch	38,909	40,852	42,985	48,147	50,664	53,285	5.0%	5.2%	12.0%	5.2%	5.2%
Salt Lake	41,700	43,655	46,538	48,150	49,866	52,639	4.7%	6.6%	3.5%	3.6%	5.6%
Morgan	42,572	43,876	45,747	48,054	49,753	52,426	3.1%	4.3%	5.0%	3.5%	5.4%
Davis	37,565	38,797	40,789	42,833	43,882	46,286	3.3%	5.1%	5.0%	2.4%	5.5%
Weber	33,835	35,209	37,029	38,222	39,832	41,853	4.1%	5.2%	3.2%	4.2%	5.1%
Daggett	34,679	34,967	38,793	37,879	38,788	41,157	0.8%	10.9%	-2.4%	2.4%	6.1%
Utah	30,977	33,269	35,683	37,454	38,880	40,919	7.4%	7.3%	5.0%	3.8%	5.2%
Kane	32,514	34,670	37,427	37,837	39,099	40,257	6.6%	8.0%	1.1%	3.3%	3.0%
Wayne	28,643	30,511	32,761	33,807	36,512	39,096	6.5%	7.4%	3.2%	8.0%	7.1%
Cache	31,034	32,527	34,456	35,600	37,518	38,974	4.8%	5.9%	3.3%	5.4%	3.9%
Washington	29,292	31,163	33,039	34,775	36,809	38,847	6.4%	6.0%	5.3%	5.8%	5.5%
Carbon	32,856	34,100	35,202	34,708	36,013	38,499	3.8%	3.2%	-1.4%	3.8%	6.9%
Box Elder	31,442	32,821	33,718	34,463	35,800	37,390	4.4%	2.7%	2.2%	3.9%	4.4%
Tooele	30,692	31,564	32,903	34,269	35,253	36,836	2.8%	4.2%	4.2%	2.9%	4.5%
Duchesne	38,447	40,706	35,676	32,963	35,387	36,709	5.9%	-12.4%	-7.6%	7.4%	3.7%
Garfield	31,032	31,720	34,189	34,750	36,486	36,688	2.2%	7.8%	1.6%	5.0%	0.6%
Juab	29,000	29,856	32,557	33,159	34,560	36,087	3.0%	9.0%	1.8%	4.2%	4.4%
Rich	34,708	38,474	39,110	34,053	34,189	35,436	10.9%	1.7%	-12.9%	0.4%	3.6%
Millard	32,477	33,459	35,372	34,272	35,195	35,196	3.0%	5.7%	-3.1%	2.7%	0.0%
Sevier	27,434	28,558	29,927	30,534	31,954	34,117	4.1%	4.8%	2.0%	4.7%	6.8%
Beaver	32,958	33,748	30,850	28,722	32,777	33,739	2.4%	-8.6%	-6.9%	14.1%	2.9%
Piute	26,453	27,434	29,323	31,175	33,200	33,716	3.7%	6.9%	6.3%	6.5%	1.6%
Emery	27,914	29,448	29,463	29,775	30,630	33,145	5.5%	0.1%	1.1%	2.9%	8.2%
Iron	26,426	28,000	29,063	29,410	30,840	32,197	6.0%	3.8%	1.2%	4.9%	4.4%
Uintah	32,811	34,107	30,715	28,580	30,135	31,563	3.9%	-9.9%	-7.0%	5.4%	4.7%
Sanpete	25,123	25,867	28,512	27,233	27,821	29,209	3.0%	10.2%	-4.5%	2.2%	5.0%
San Juan	24,037	23,403	23,727	24,069	25,344	26,638	-2.6%	1.4%	1.4%	5.3%	5.1%

Note: All dollar amounts are in current dollars (not adjusted for inflation).
Source: U.S. Bureau of Economic Analysis. Last updated: November 14, 2019—new statistics for 2018; revised statistics for 1969–2017.

Gross Domestic Product by State

5

Andrea Wilko, Utah Legislative Fiscal Analyst Office

2018 OVERVIEW

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

Nominal GDP

Utah's nominal GDP (measured in current dollars) was estimated to be $178.1 billion in 2018, up from $167.3 billion in 2017. This represents a growth rate of 6.5% which ranks the seventh-highest in the nation. Much of Utah's GDP growth is targeted in the Silicon Slopes region of the state. National GDP has been strengthened by a strong stock market, consumer confidence, and retail sales.

Real GDP

Utah's real GDP (measured in 2012 chained dollars) was $158.8 billion in 2018, up from $153.1 billion in 2017. This represents a growth rate of 3.7 percent. The nation's real GDP grew by 2.9 percent over last year. Utah's GDP growth is expected to remain above the national average at about 3.7 percent for 2019.

Industry Growth

Seven sectors of Utah's GDP continue to grow at above 5.0% including: construction; manufacturing; trade, transportation and utilities; financial activities; professional and business services; education and health services; and government. Utah's lowest growth industries in 2018 were agriculture at 2.0% and other services at 2.7%.

Financial activities represents Utah's largest sector at 22.4% of total GDP in 2018. Trade, transportation, and utilities ranks second at 16.9%.

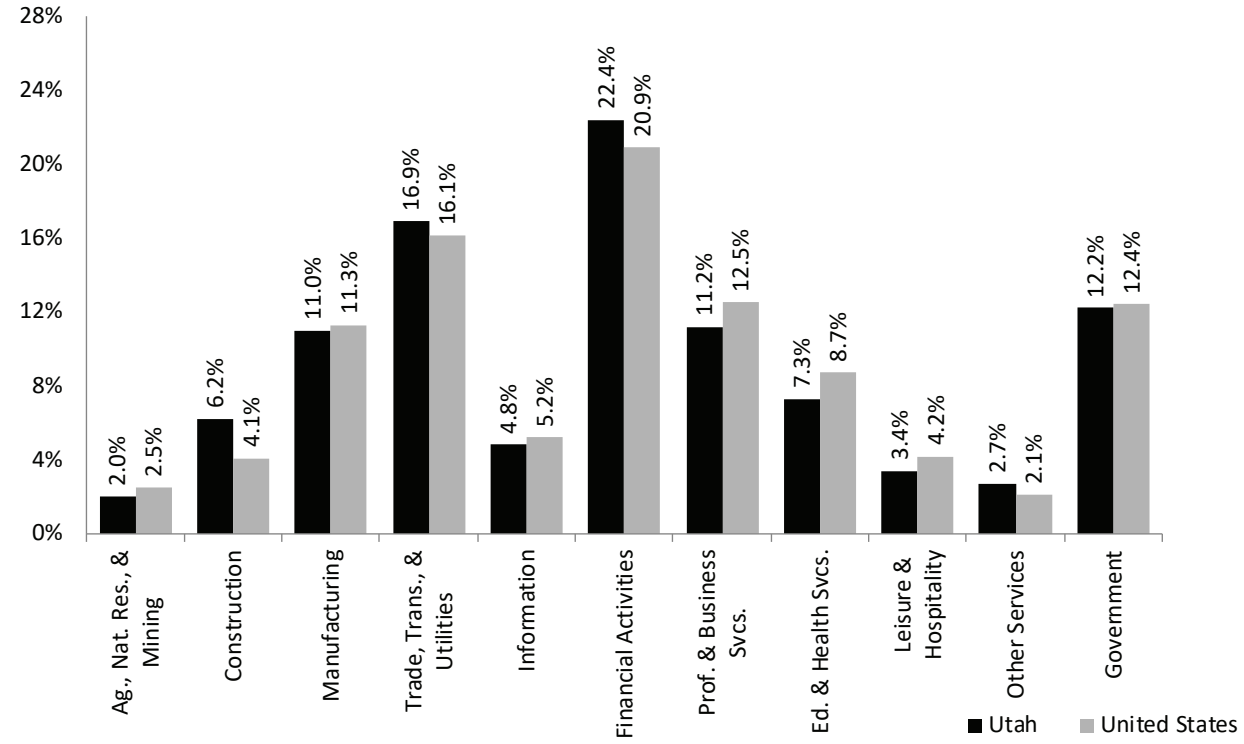
2019/2020 OUTLOOK

Utah's current real GDP growth rate of 3.7% is higher than the average growth rate of the previous five years (2013-2017). Strong GDP performance should help Utah remain one of the top economic performers in the nation through 2019 and 2020.

National GDP growth has been driven largely by a strong stock market and consumer spending in the first six months of 2019. The national growth rate could slow to 2.3% in the last half of 2019 and to 2.1% in 2020 if consumer and business spending drop as a result of national trade decisions.

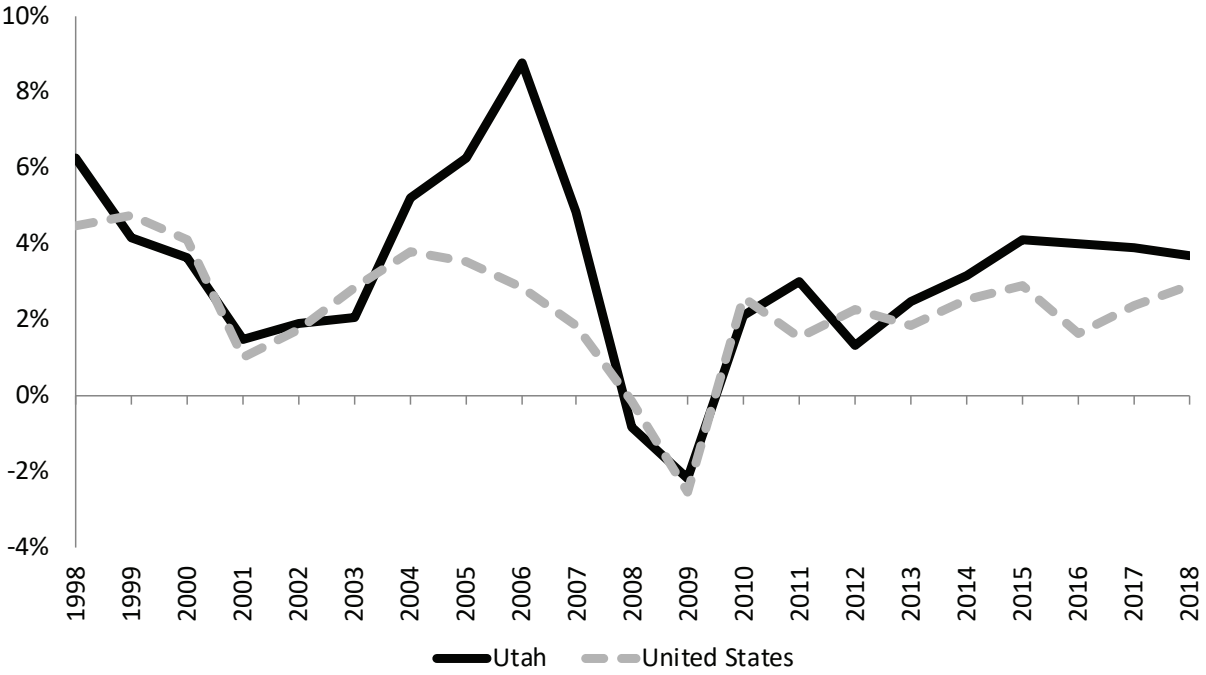
Looking forward, potential federal trade policy changes, monetary stimulus, inflation risk, and geopolitical instability could present challenges to Utah's economy, in particular for GDP growth. However, Utah's strong and diversified industrial composition will continue to help GDP growth remain in the 3.7-3.9% range for 2019 and 2020.

Figure 5.1: Percent of Gross Domestic Product by Industry: 2018



Source: Bureau of Economic Analysis

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



Source: Bureau of Economic Analysis

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

State	Millions of Dollars						2018 Share of Total	2017 –18 Change
	2013	2014	2015	2016	2017	2018		
United States	$16,784,851	$17,527,258	$18,224,780	$18,715,040	$19,519,424	$20,580,223	100.0%	5.4%
Alabama	191,481	194,211	200,403	203,830	210,364	221,736	1.1%	5.4%
Alaska	56,623	55,523	50,642	49,363	51,803	54,734	0.3%	5.7%
Arizona	275,199	284,430	297,141	311,091	327,496	348,297	1.7%	6.4%
Arkansas	114,252	117,337	118,761	120,375	123,383	128,419	0.6%	4.1%
California	2,262,771	2,395,162	2,553,772	2,657,798	2,819,111	2,997,733	14.6%	6.3%
Colorado	288,305	306,571	318,555	329,368	350,004	371,750	1.8%	6.2%
Connecticut	246,632	248,865	260,073	263,696	268,311	275,727	1.3%	2.8%
Delaware	60,666	66,891	70,969	69,550	70,775	73,481	0.4%	3.8%
District of Columbia	114,891	119,841	125,212	129,826	134,043	140,661	0.7%	4.9%
Florida	800,704	839,484	895,146	938,774	985,665	1,039,236	5.0%	5.4%
Georgia	460,585	485,817	513,566	539,525	566,474	592,153	2.9%	4.5%
Hawaii	75,788	77,854	82,710	85,844	89,429	93,798	0.5%	4.9%
Idaho	61,018	63,522	66,004	69,029	72,723	77,052	0.4%	6.0%
Illinois	739,628	765,348	792,999	806,316	826,818	865,310	4.2%	4.7%
Indiana	308,682	324,935	330,032	338,126	351,106	366,801	1.8%	4.5%
Iowa	160,300	171,561	178,473	179,547	181,846	189,702	0.9%	4.3%
Kansas	143,221	148,226	152,374	156,857	161,220	168,318	0.8%	4.4%
Kentucky	182,359	186,523	191,923	195,342	200,715	208,088	1.0%	3.7%
Louisiana	228,967	238,680	234,299	227,227	239,204	257,288	1.3%	7.6%
Maine	53,719	55,795	57,526	59,754	62,040	64,856	0.3%	4.5%
Maryland	341,255	352,047	367,097	384,889	394,259	412,584	2.0%	4.6%
Massachusetts	454,346	473,279	502,858	519,408	540,786	569,488	2.8%	5.3%
Michigan	432,718	449,128	474,301	491,774	505,561	527,096	2.6%	4.3%
Minnesota	306,153	319,779	329,493	339,100	351,417	368,852	1.8%	5.0%
Mississippi	101,638	104,146	105,883	107,097	110,223	114,834	0.6%	4.2%
Missouri	277,851	284,713	294,795	297,583	304,946	318,921	1.5%	4.6%
Montana	43,141	44,496	46,153	45,458	47,559	50,327	0.2%	5.8%
Nebraska	107,604	111,162	115,328	116,194	120,517	123,978	0.6%	2.9%
Nevada	130,621	135,153	144,232	151,215	158,848	169,310	0.8%	6.6%
New Hampshire	70,182	72,340	76,033	78,478	80,900	84,464	0.4%	4.4%
New Jersey	533,687	546,687	569,680	582,428	595,325	622,003	3.0%	4.5%
New Mexico	88,411	92,481	90,969	91,044	94,267	100,297	0.5%	6.4%
New York	1,355,581	1,427,495	1,487,754	1,539,555	1,604,134	1,668,866	8.1%	4.0%
North Carolina	455,522	475,995	503,629	519,122	538,402	563,691	2.7%	4.7%
North Dakota	53,882	58,650	55,012	50,833	52,472	56,082	0.3%	6.9%
Ohio	561,046	593,355	610,772	622,835	645,326	675,905	3.3%	4.7%
Oklahoma	182,618	195,023	185,937	178,913	188,368	202,554	1.0%	7.5%
Oregon	179,383	188,880	203,159	215,050	226,619	239,783	1.2%	5.8%
Pennsylvania	663,901	691,188	711,205	726,164	744,290	783,168	3.8%	5.2%
Rhode Island	53,210	54,427	56,759	57,694	58,506	60,588	0.3%	3.6%
South Carolina	183,015	191,938	203,921	212,987	223,111	233,930	1.1%	4.8%
South Dakota	44,815	46,047	47,752	48,606	49,739	52,015	0.3%	4.6%
Tennessee	292,804	303,809	322,664	335,026	345,950	364,105	1.8%	5.2%
Texas	1,502,250	1,572,818	1,568,457	1,565,632	1,665,632	1,802,511	8.8%	8.2%
Utah	**134,252**	**141,260**	**149,372**	**157,883**	**167,255**	**178,138**	**0.9%**	**6.5%**
Vermont	29,099	29,701	30,730	31,659	32,210	33,256	0.2%	3.2%
Virginia	455,070	463,478	484,217	493,878	509,373	532,893	2.6%	4.6%
Washington	419,345	442,201	470,329	491,358	524,815	565,831	2.7%	7.8%
West Virginia	71,038	71,919	70,281	69,721	73,163	77,438	0.4%	5.8%
Wisconsin	282,385	293,885	305,817	313,532	321,988	336,294	1.6%	4.4%
Wyoming	38,923	39,436	37,722	35,740	37,454	39,119	0.2%	4.4%

Note: Last updated November 7, 2019
Source: Bureau of Economic Analysis

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

State	Millions of Chained 2012 Dollars						2018 Share of Total	2017–18 Change
	2013	2014	2015	2016	2017	2018		
United States	$16,495,369	$16,912,038	$17,403,843	$17,688,890	$18,108,082	$18,638,164	100.0%	2.9%
Alabama	188,165	186,849	189,339	190,703	193,024	198,436	1.1%	2.8%
Alaska	54,750	53,273	53,799	52,711	52,727	53,092	0.3%	0.7%
Arizona	270,149	273,677	280,230	289,230	299,406	311,706	1.7%	4.1%
Arkansas	111,779	112,932	113,861	114,541	115,347	117,294	0.6%	1.7%
California	2,220,868	2,312,540	2,428,598	2,500,950	2,610,682	2,721,651	14.6%	4.3%
Colorado	282,534	295,699	309,180	316,752	329,574	341,077	1.8%	3.5%
Connecticut	241,081	237,784	242,911	242,794	243,683	244,926	1.3%	0.5%
Delaware	59,157	63,500	65,876	63,109	62,740	62,765	0.3%	0.0%
District of Columbia	112,678	114,911	117,238	119,567	121,011	123,982	0.7%	2.5%
Florida	784,090	805,278	839,124	866,731	896,117	924,873	5.0%	3.2%
Georgia	450,772	465,646	481,576	498,267	516,594	528,999	2.8%	2.4%
Hawaii	74,278	74,529	77,185	78,905	80,716	82,652	0.4%	2.4%
Idaho	59,831	61,395	63,098	65,535	67,818	70,500	0.4%	4.0%
Illinois	724,616	735,036	744,518	747,168	753,638	769,801	4.1%	2.1%
Indiana	303,920	313,741	311,601	316,636	322,746	329,299	1.8%	2.0%
Iowa	156,637	165,088	169,375	168,876	168,435	172,072	0.9%	2.2%
Kansas	140,506	143,425	146,173	149,928	151,466	154,583	0.8%	2.1%
Kentucky	179,390	179,989	181,323	182,619	184,541	187,216	1.0%	1.4%
Louisiana	226,616	233,676	232,458	228,253	231,373	237,372	1.3%	2.6%
Maine	52,505	53,418	53,781	54,971	56,189	57,450	0.3%	2.2%
Maryland	334,939	338,734	345,230	356,818	360,030	368,860	2.0%	2.5%
Massachusetts	444,866	453,884	471,135	478,961	490,840	506,073	2.7%	3.1%
Michigan	424,320	431,511	442,482	452,269	459,129	470,529	2.5%	2.5%
Minnesota	300,633	309,239	313,086	319,130	325,323	333,920	1.8%	2.6%
Mississippi	99,622	100,118	100,243	100,657	101,516	102,837	0.6%	1.3%
Missouri	271,902	273,171	276,700	275,501	278,192	284,924	1.5%	2.4%
Montana	42,434	43,174	44,871	44,265	45,029	46,220	0.2%	2.6%
Nebraska	105,038	107,166	110,326	110,812	113,110	114,170	0.6%	0.9%
Nevada	128,273	130,000	135,429	139,296	143,733	149,780	0.8%	4.2%
New Hampshire	68,800	69,545	71,511	72,816	74,119	75,833	0.4%	2.3%
New Jersey	523,334	525,729	535,299	539,943	543,530	555,755	3.0%	2.2%
New Mexico	86,506	89,275	91,201	91,268	91,344	93,605	0.5%	2.5%
New York	1,319,299	1,349,268	1,372,163	1,389,681	1,418,942	1,435,636	7.7%	1.2%
North Carolina	445,361	455,046	469,479	475,339	485,499	497,331	2.7%	2.4%
North Dakota	52,531	56,523	54,902	51,036	51,015	52,873	0.3%	3.6%
Ohio	550,800	571,912	580,414	585,089	594,315	605,395	3.2%	1.9%
Oklahoma	177,602	187,739	195,902	190,110	191,544	196,525	1.1%	2.6%
Oregon	175,805	181,861	191,999	200,948	208,626	216,562	1.2%	3.8%
Pennsylvania	651,319	666,494	681,235	689,844	693,676	711,822	3.8%	2.6%
Rhode Island	52,085	52,134	53,097	53,091	52,989	53,625	0.3%	1.2%
South Carolina	178,940	183,562	189,900	195,460	201,873	207,203	1.1%	2.6%
South Dakota	43,602	44,153	45,443	45,686	45,619	46,491	0.2%	1.9%
Tennessee	286,801	291,688	301,587	308,032	313,837	323,675	1.7%	3.1%
Texas	1,472,104	1,523,057	1,596,362	1,600,260	1,646,264	1,712,764	9.2%	4.0%
Utah	**131,902**	**136,082**	**141,703**	**147,414**	**153,129**	**158,800**	**0.9%**	**3.7%**
Vermont	28,499	28,522	28,907	29,363	29,407	29,750	0.2%	1.2%
Virginia	446,560	445,869	454,953	456,676	464,793	477,006	2.6%	2.6%
Washington	411,141	425,763	444,319	459,754	483,773	511,672	2.7%	5.8%
West Virginia	70,159	69,874	69,761	68,901	69,904	71,481	0.4%	2.3%
Wisconsin	276,190	282,079	287,164	290,750	294,657	301,623	1.6%	2.4%
Wyoming	38,504	38,718	39,723	38,053	37,997	38,040	0.2%	0.1%

Note: Last updated November 7, 2019
Source: Bureau of Economic Analysis

Utah Taxable Sales

6

Eric Cropper, Utah State Tax Commission
Jacoba Larsen, Utah State Tax Commission

This analysis was completed prior to the passage of SB2001, Tax Restructuring Revisions, in the 2019 second special session of the Utah Legislature. See gomb.utah.gov and le.utah.gov/lfa for more information.

2019 OVERVIEW

In 2019, total taxable sales (sales and purchases subject to sales and use tax) in Utah increased by an estimated 4.4% to approximately $67.8 billion. Growth in 2019 was slower than recent years and among the slowest years that the state has experienced since the Great Recession. Although growth in total taxable sales was buoyed by an increase in remote sales and by a labor market that is among the best in the nation, it was also tempered by an expansion of the manufacturing exemption and by a slowing in business and consumer spending. Growth rates for retail sales and taxable services were the lowest since 2010 when the recovery from the Great Recession began, increasing by 3.9% and 4.0% respectively in 2019. Business investment also underperformed recent years, declining by 3.5%. Conversely, all other sales not categorized in those three sectors increased by an estimated 29.0% in 2019.

Retail Sales

Consumers are a key driver of the economy. As such, retail sales are an often-watched indicator of consumer spending. Retail sales are also of particular import as they account for just over half of all Utah taxable sales. In 2019, retail sales increased 3.9% to an estimated $34.7 billion. Despite relatively slow growth, Utah retail sales still outpaced the estimated 3.6% increase in U.S. total retail sales in 2019. Slowing global growth, the US-China trade war and apprehension of a future recession may have dampened consumer spending and growth in this sector, notwithstanding solid gains in employment and personal income.

Business Investment Purchases

After two years of near 10% growth, business investment purchases decreased by 3.5% to an estimated $9.6 billion. Decreases can be partially attributed to Senate Bill 2001 from the 2018 Second Special Session (SB 2001), which expanded the sales tax exemption for mining and manufacturing to include items with less than a three-year economic life. Of all industries, mining experienced the largest decline in 2019 with a year over year decrease of approximately 50%. The decline in this industry is primarily due to the expansion of the mining sales tax exemption. Trade policy uncertainty in 2019 also weighed on business investment and contributed to the decline.

Taxable Services

In Utah during 2019, only a handful of services were subject to sales tax. The largest industries subject to sales tax on services included accommodations, recreation, entertainment, and food services. In 2019 taxable services increased by an estimated 4.0% to $18.2 billion in 2019. Strong consumer fundamentals and a diverse state tourism industry has driven steady growth in this sector since the Great Recession with annual increases ranging from 4.0% to 6.0%.

All Other

The category "All Other" consists of transaction types such as private motor vehicle sales and prior period refunds/payments that do not fit into the other three sectors. This category also includes sales remitted by taxpayers where an industry NAICS code could not be determined. In 2019, All Other grew by an estimated 29.0% and accounted for approximately 7.9% of all taxable sales. High growth in this category is primarily the result of an increase in remote sales. SB 2001 from 2018, which followed the South Dakota v. Wayfair United States Supreme Court decision, required remote sellers without physical presence in the state to remit sales tax beginning January 1, 2019. Sales from taxpayers without a direct physical presence in the state often do not have an identifiable industry NAICS code and end up categorized under All Other sales.

2020 OUTLOOK

Momentum in Utah's strong labor market is forecasted to drive another year of growth in Utah's total taxable sales in 2020. Total taxable sales are forecasted to increase by 5.2% to $71.3 billion in 2020. Healthy consumer fundamentals (low unemployment, strong wage growth, and low debt service) point to another of year of solid growth in retail sales and taxable services, which are forecasted to increase by 4.6% and 4.7% respectively. Business investment purchases are forecasted to rebound, growing by 6.0%.

Recent and future legislation has the potential to impact forecasts for 2020. Specifically, SB 168 from the 2019 General Session, which took effect on October 1, 2019, requires marketplace facilitators that meet certain requirements to collect and remit sales and use tax on each sale the marketplace facilitator makes on its own behalf or that it makes or facilitates on behalf of a marketplace seller. Although this legislation may significantly increase compliance and reporting for remote sales, the entirety of impacts are unknown as of this writing and have only been represented to the extent estimated in the SB168 fiscal note.

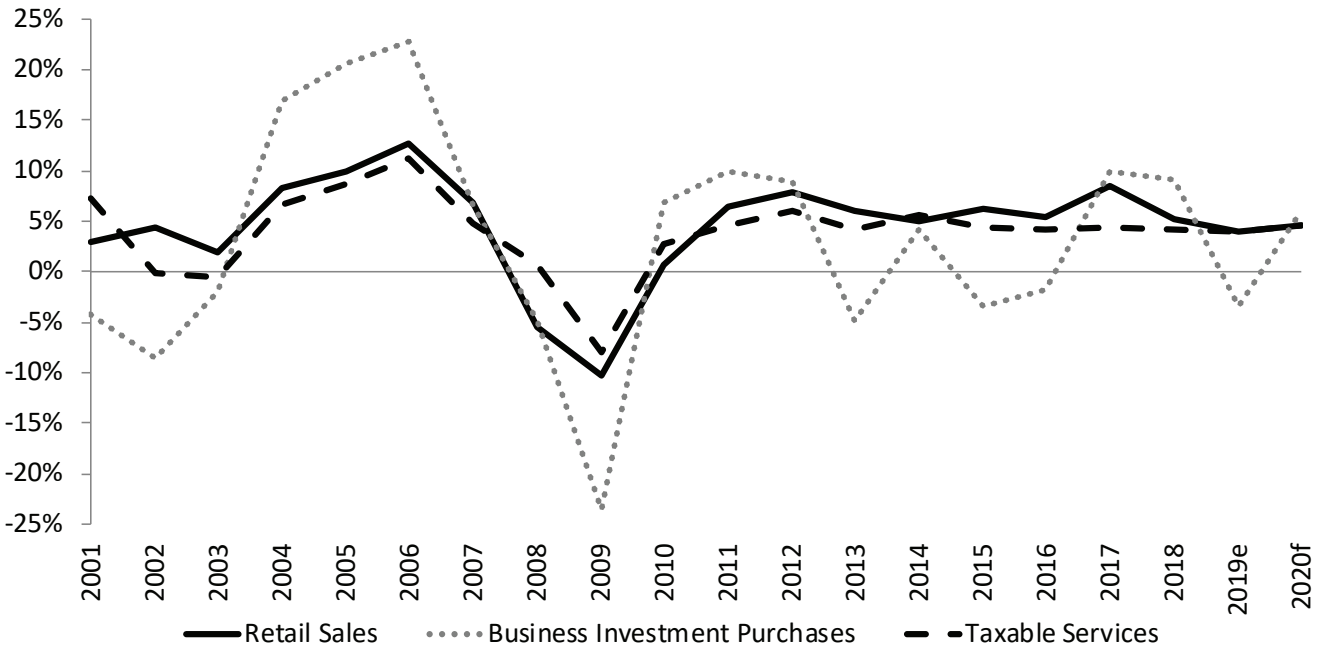
Additionally, tax reform legislation (SB 2001) passed in the 2019 Second Special Session modifies numerous sales tax exemptions and expands the sales tax base to include a number of services beginning on April 1, 2020. Although this legislation will impact taxable sales in 2020, the impacts have not been included in the forecasts due to the timing of its passage. However, based on the fiscal note for this bill, these legislative changes are forecasted to increase taxable sales by approximately $750 million in 2020.

Although overall growth in 2020 is forecasted to exceed growth in 2019, significant uncertainty due to trade tensions and other geopolitical events presents risks to the forecasts and has softened the outlook somewhat. Conditions with the potential to impact 2020 taxable sales are primarily external in nature and include, but are not limited to, monetary and tax policy decisions, elections, national political climate, commodity prices, and geopolitical instability. Any significant changes in these and other economic or political conditions could result in changes to employment, disposable income, and consumer confidence, which will in turn affect Utah taxable sales.

Summary

In 2019, Utah taxable sales continued a trend of growth, although at a more moderate pace. Growth was driven by a strong labor market but was dampened by a slowing in business and consumer spending due to uncertainty in the global market. Forecasts in 2020 predict solid growth tempered by continued uncertainty due to primarily external risks. Expectations of a continued strong labor market and healthy consumer fundamentals should drive another year of growth in Utah Taxable Sales. The outlook for 2020 Utah taxable sales is cautiously optimistic.

Figure 6.1: Annual Percent Change in Utah Taxable Sales by Component



e = estimate
f = forecast prior to 2019 second special session SB2001, Tax Restructuring Revisions (does not include impacts of this bill).
Source: Utah State Tax Commission

Table 6.1: 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
2001	$15,751.9	$5,701.1	$9,482.0	$1,527.8	$32,462.7					
2002	16,431.7	5,216.4	9,459.3	1,299.5	32,407.0	4.3	-8.5	-0.2	-14.9	-0.2
2003	16,729.9	5,114.7	9,414.2	1,268.4	32,527.1	1.8	-2.0	-0.5	-2.4	0.4
2004	18,128.5	5,976.5	10,035.1	1,287.4	35,427.5	8.4	16.8	6.6	1.5	8.9
2005	19,933.7	7,206.7	10,902.0	1,366.6	39,408.9	10.0	20.6	8.6	6.1	11.2
2006	22,463.7	8,847.8	12,124.7	1,620.7	45,056.9	12.7	22.8	11.2	18.6	14.3
2007	23,998.3	9,432.3	12,717.5	1,646.8	47,794.8	6.8	6.6	4.9	1.6	6.1
2008	22,658.7	8,980.7	12,811.0	1,483.2	45,933.6	-5.6	-4.8	0.7	-9.9	-3.9
2009	20,328.5	6,863.7	11,789.5	1,499.1	40,481.0	-10.3	-23.6	-8.0	1.1	-11.9
2010	20,475.1	7,333.3	12,114.5	1,464.5	41,387.4	0.7	6.8	2.8	-2.3	2.2
2011	21,800.8	8,063.5	12,676.4	1,556.4	44,097.0	6.5	10.0	4.6	6.3	6.5
2012	23,512.2	8,780.1	13,438.7	1,800.2	47,531.2	7.9	8.9	6.0	15.7	7.8
2013	24,943.6	8,352.4	14,008.4	2,099.6	49,404.0	6.1	-4.9	4.2	16.6	3.9
2014	26,192.7	8,698.6	14,801.9	2,016.0	51,709.2	5.0	4.1	5.7	-4.0	4.7
2015	27,801.2	8,399.8	15,448.8	2,283.4	53,933.3	6.1	-3.4	4.4	13.3	4.3
2016	29,302.8	8,255.1	16,102.3	2,842.2	56,502.4	5.4	-1.7	4.2	24.5	4.8
2017	31,778.9	9,079.1	16,816.4	3,357.3	61,031.7	8.4	10.0	4.4	18.1	8.0
2018	33,403.9	9,910.1	17,517.8	4,150.7	64,982.5	5.1	9.2	4.2	23.6	6.5
2019e	34,708.1	9,567.3	18,210.3	5,356.4	67,842.1	3.9	-3.5	4.0	29.0	4.4
2020f	36,321.0	10,143.7	19,061.6	5,817.1	71,343.4	4.6	6.0	4.7	8.6	5.2

Note: The major components of taxable sales are composed of NAICS categories as follows: Retail Trade Sales: All retail categories in NAICS Codes 44-45; Business Investment Purchases: Agriculture Forestry Fishing & Hunting, Mining Quarrying & Oil & Gas Extraction, Construction, Manufacturing, Wholesale Trade, and Transportation & Warehousing; Taxable Services: Information, Finance & Insurance, Real Estate Rental & Leasing, Professional Scientific & Technical Services, Management of Companies & Enterprises, Administration & Support & Waste Management & Remediation Services, Educational Services, Health Care & Social Assistance, Arts Entertainment & Recreation, Accommodation, Food Services & Drinking Places, Other Services, and Utilities; All Other: composed of all other NAICS categories, as well as Private Motor Vehicle Sales, Special Event Sales, Nonclassifiable Sales, and Prior Period Payments & Refunds.
e = estimate
f = forecast prior to 2019 second special session SB2001, Tax Restructuring Revisions (does not include impacts of this bill).
Source: Utah State Tax Commission

Table 6.2: Utah Taxable Sales by County

County	Millions of Dollars						Percent Change 2017-2018	% of Total 2018
	2013	2014	2015	2016	2017	2018		
Beaver	$108.8	$105.3	$108.6	$119.8	$99.6	$104.5	4.9	0.2
Box Elder	565.5	565.8	642.2	705.4	769.2	791.6	2.9	1.2
Cache	1,446.5	1,514.7	1,631.3	1,726.7	1,874.3	1,954.2	4.3	3.0
Carbon	403.6	425.1	390.4	362.1	383.0	411.9	7.6	0.6
Daggett	18.7	16.4	18.3	16.7	19.5	21.2	8.7	0.0
Davis	4,268.2	4,550.8	4,897.8	5,141.6	5,483.5	5,689.0	3.7	8.8
Duchesne	876.6	895.5	443.7	370.9	480.5	529.0	10.1	0.8
Emery	127.7	139.4	127.6	135.4	129.6	154.0	18.8	0.2
Garfield	111.1	120.7	128.9	139.3	154.5	157.8	2.1	0.2
Grand	336.3	390.3	367.7	389.7	424.5	451.5	6.3	0.7
Iron	642.5	656.6	723.5	784.6	842.1	921.6	9.4	1.4
Juab	89.2	96.9	107.0	108.6	116.8	128.1	9.6	0.2
Kane	157.3	164.7	180.6	195.5	216.4	239.6	10.7	0.4
Millard	179.8	193.3	169.0	181.6	189.6	194.9	2.8	0.3
Morgan	75.6	93.3	104.4	107.1	120.2	123.1	2.5	0.2
Piute	8.2	10.0	9.9	9.1	9.6	11.1	16.4	0.0
Rich	29.7	19.6	36.5	39.8	46.9	54.6	16.4	0.1
Salt Lake	21,986.1	22,941.0	24,256.5	25,415.5	27,084.5	28,855.6	6.5	44.4
San Juan	212.1	184.6	150.4	156.5	158.3	188.9	19.3	0.3
Sanpete	211.0	228.7	237.5	246.4	272.8	285.2	4.5	0.4
Sevier	347.2	376.4	366.3	365.0	390.5	417.3	6.9	0.6
Summit	1,469.8	1,570.9	1,743.7	1,869.4	2,002.1	2,102.9	5.0	3.2
Tooele	618.9	633.7	701.8	694.3	767.8	801.4	4.4	1.2
Uintah	1,453.7	1,470.0	974.5	725.5	909.6	941.5	3.5	1.4
Utah	7,186.9	7,555.1	8,151.1	8,679.1	9,556.5	10,173.9	6.5	15.7
Wasatch	386.2	429.5	474.0	525.0	595.1	662.5	11.3	1.0
Washington	2,555.2	2,733.7	2,970.9	3,247.1	3,608.6	3,952.9	9.5	6.1
Wayne	39.4	39.5	43.6	47.8	55.0	59.6	8.5	0.1
Weber	3,527.3	3,719.5	3,927.0	4,115.4	4,387.0	4,655.8	6.1	7.2
Other*	-35.2	-132.0	-151.6	-118.5	-116.1	-52.9	-54.4	-0.1
State of Utah	**49,404.0**	**51,709.2**	**53,933.3**	**56,502.4**	**61,031.7**	**64,982.5**	**6.5**	**100.0**

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

Tax Collections

7

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

This analysis was completed prior to the passage of SB2001, Tax Restructuring Revisions, in the 2019 second special session of the Utah Legislature. See gomb.utah.gov and le.utah.gov/lfa for more information.

2019 OVERVIEW

Tax collections, while showing some signs of moderating, once again posted gains in fiscal year (FY) 2019. Starting in FY 2011 Utah has seen steady growth in state revenues. Utah labor market conditions were favorable with employment and total wage growth estimated at 3.0% and 6.8% in FY 2019, respectively. Total unrestricted state revenues rose 7.0% in FY 2019 following 10.5% growth the prior year.

Total unrestricted revenues in Utah have posted gains for nine consecutive years. In FY 2019 unrestricted revenue totaled $8,242.4 million, exceeding the February 2019 forecast (adjusted for legislation) of $8,124.1 million by $118.3 million. Total General Fund and Education Fund revenues grew 3.7% and 9.1%, respectively. Total Transportation Fund revenues increased 6.1%, while Mineral Lease revenues edged up 0.8%.

General Fund

Most major General Fund revenue sources posted positive growth in FY 2019. The exceptions were declining collections from cable and satellite excise taxes; beer, cigarette and tobacco taxes; and oil and gas severance taxes. Total unrestricted General Fund revenues of $2,634.2 million rose 3.7% in FY 2019, reflecting slower growth in collections compared to the 8.4% increase in FY 2018. Unrestricted sales tax revenue grew 4.8% while total sales tax, including earmarked revenue, increased 5.4% in FY 2019. Healthy wage growth and a positive consumer situation are contributing to growth in sales tax revenues. Sales tax earmarks, which have increased steadily since FY 2011 (when they were $189.2 million), totaled $690.9 million in FY 2019, a 7.3% increase over the prior year.

Revenue from liquor profits increased 5.2% in FY 2019. Unrestricted insurance premium tax collections grew 2.3% in FY 2019. Mining severance tax revenue grew 31.7% following an 11.3% increase FY 2018. FY 2019 oil and gas severance tax collections, however, fell 16.9% following an 87.4% increase in FY 2018.

Education Fund

Total FY 2019 Education Fund revenues increased 9.1% to $4,908.7 million, boosted by 8.0% growth in individual income tax collections and double-digit growth in corporate, mineral production withholding, and Education Fund "other" taxes.

FY 2019 revenue from corporate taxes grew 16.3% following a 36.4% jump in FY 2018. As a result of a rebound in Utah's natural resource sector, mineral production withholding tax revenue increased 33.3% following a 42.7% rise in FY 2018.

Transportation Fund

Total Transportation Fund revenues of $619.9 million rose 6.1% in FY 2019. Revenue from motor fuel taxes grew 5.0% in FY 2019. Similarly, special fuel tax revenue increased 5.5%. Other Transportation Fund revenue increased 10.9%.

2020 OUTLOOK

While Utah has experienced uninterrupted growth in its economy since the Great Recession, there is always the potential for negative developments at the national and international level that could impact the state's economy. These include trade policy or tariffs, a correction in equities or asset values leading to a decline in business and consumer confidence, fiscal or monetary policy changes such as rising interest rates or tax policy changes, a decline in one or more international economies, political or military conflicts, geopolitical events, a weakening of U.S. labor markets, or negative developments in a particular economic sector.

In addition, legislative changes or court decisions have the potential to impact tax collections. One example is SB 2001 enacted in the 2018 Second Special Session following the Supreme Court decision in Wayfair v. South Dakota. SB 2001 requires remote sellers without physical presence in the state to collect sales tax beginning January 1, 2019. This bill also exempts manufacturing and mining equipment with less than a three-year economic life from sales taxes. Another example is SB 168 from the 2019 General Session which requires marketplace facilitators that meet certain criteria to collect and remit sales and use tax on each sale the marketplace facilitator makes on its own behalf or that it makes or facilitates on behalf of a marketplace seller beginning October 1, 2019.

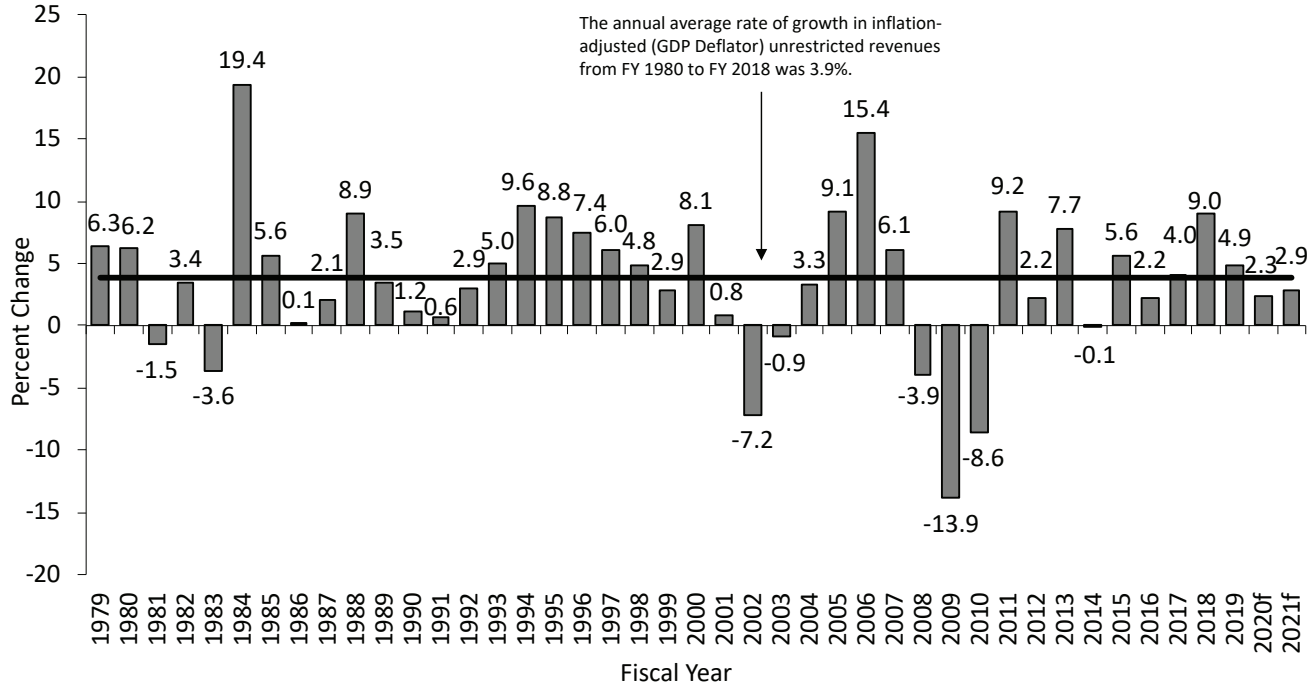
Additionally, tax reform legislation (SB 2001) passed in the 2019 Second Special Session modifies numerous tax provisions, including: reducing the state income tax rate from 4.95% to 4.66%, normalizing the state sales tax on unprepared food and food ingredients to the 4.85% general rate, enacting tax credits dedicated to offsetting sales tax impacts for low- and middle-income households—including a grocery tax credit and personal exemption expansion, both of which also have "prebates" sent out in the first six months of 2020—and replacing a portion of transportation earmarks with road user fees via collecting a gas and non-diesel special fuel sales tax, among numerous other changes. Although these changes will impact tax revenues in 2020, the effects have not been included in the figures and tables herein due to the timing of the bill's passage. Please refer to the Governor's Fiscal Year 2021 Budget Recommendation Book for detailed estimates of these impacts.

Summary

FY 2019 marks nine years of consecutive increases in total unrestricted tax revenues in Utah. While the recovery in Utah can be described as mature, there is a great deal of momentum in the economy. We expect strong growth in tax collections in FY 2020, barring any economic disruptions.

Figure 7.1: Unrestricted General and Education Fund Revenues

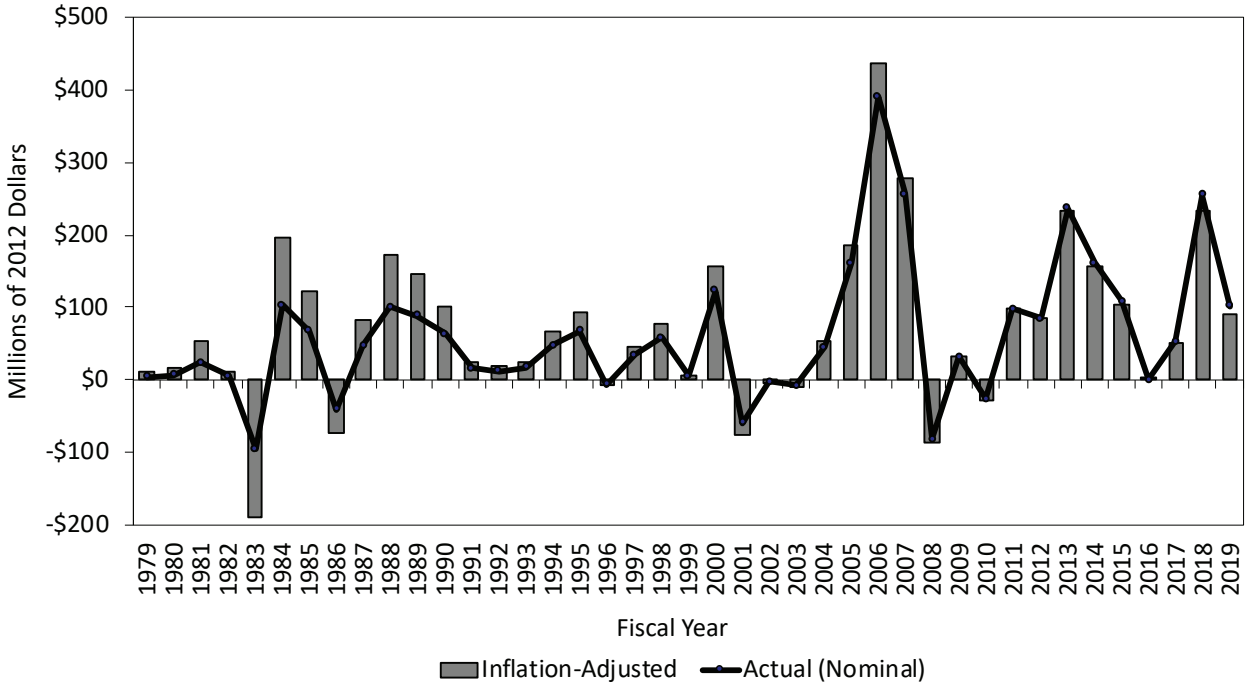
Inflation-Adjusted Percentage Change



f = forecast prior to 2019 second special session SB2001, Tax Restructuring Revisions (does not include impacts of this bill).
Source: Utah State Tax Commission

Figure 7.2: Actual and Inflation-Adjusted Unrestricted Revenues

Surplus/Deficit for the General and Education Fund

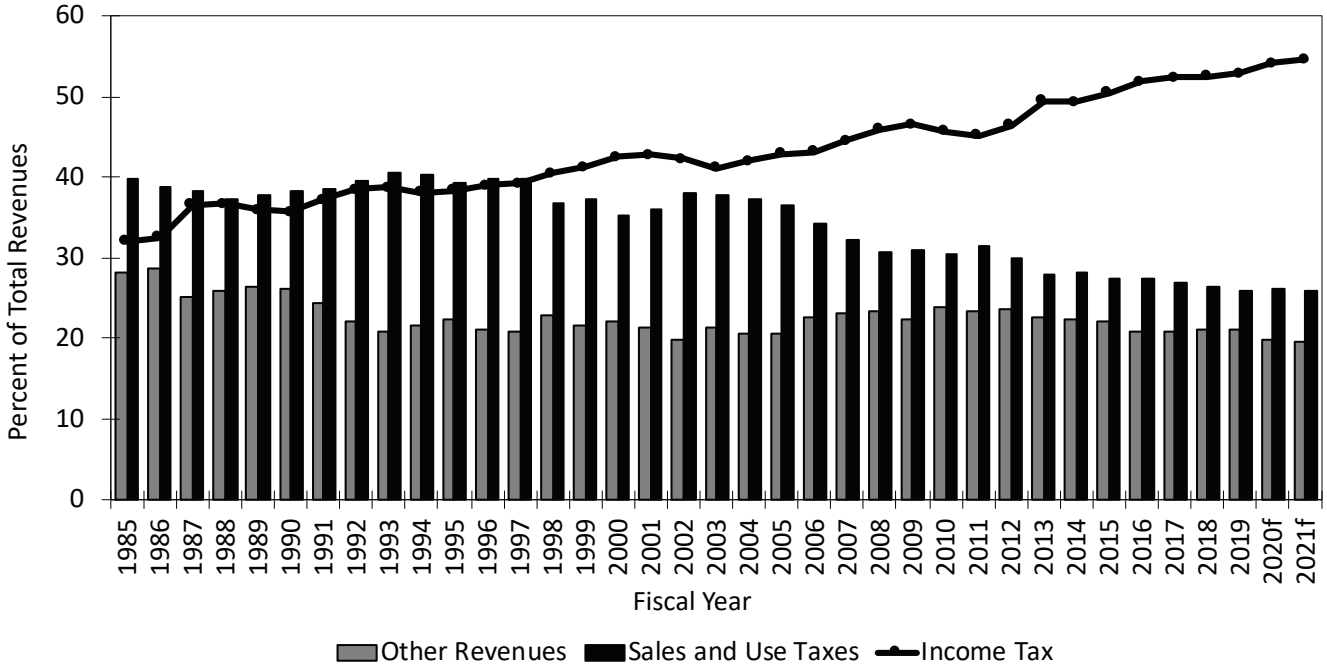


Note: Dollars amounts adjusted for inflation from nominal amounts using the GDP implicit price deflator.

Source: Governor's Office of Management and Budget

Figure 7.3: Sales and Use Taxes, Income Tax, and All Other Unrestricted Revenues

Percent of Total State Unrestricted Revenues



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

f = forecast prior to 2019 second special session SB2001, Tax Restructuring Revisions (does not include impacts of this bill).
Source: Utah State Tax Commission and Governor's Office of Management and Budget

Table 7.1: Fiscal Year Revenue Collections
(millions of current dollars)

Revenue Source	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020f	2021f
Sales and Use Tax	$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	$1,715.0	$1,778.5	$1,856.8	$2,018.7	$2,116.3	$2,223.4	$2,325.6
Earmarked Sales and Use Tax	39.1	42.0	100.2	250.0	325.3	276.3	301.0	189.2	332.1	422.1	452.5	495.8	543.1	585.4	643.5	690.6	794.9	824.3
Total Sales and Use Tax	**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**	**2,210.7**	**2,321.6**	**2,442.1**	**2,662.3**	**2,806.9**	**3,018.3**	**3,149.9**
Cable/Satellite Excise Tax	0.0	11.7	20.5	20.8	24.1	24.8	25.3	25.4	28.7	26.9	26.0	28.4	28.6	31.3	29.3	28.2	28.0	27.9
Liquor Profits	37.7	38.1	47.3	53.2	59.7	59.7	58.4	62.3	70.8	81.4	87.8	95.4	104.0	106.3	112.3	118.1	121.3	126.2
Insurance Premiums	62.4	67.4	71.4	71.8	77.2	83.0	80.0	75.9	84.4	89.6	91.2	92.4	111.7	122.0	133.6	136.6	143.7	149.6
Beer, Cigarette, and Tobacco	62.8	61.9	60.8	62.4	62.8	60.6	58.7	125.5	125.4	120.9	113.1	115.9	118.3	116.3	112.1	106.0	103.2	99.7
Oil and Gas Severance Tax	36.7	53.5	71.5	65.4	65.5	71.0	56.2	59.9	65.5	53.2	89.2	69.7	20.8	9.3	17.4	14.5	15.5	15.4
Mining Severance Tax	6.0	11.4	17.0	23.6	26.5	14.6	20.9	27.1	25.4	16.9	15.9	16.3	7.0	6.8	7.6	10.0	11.0	11.4
Inheritance Tax	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	0.0	0.0	0.0	0.0	0.0
Investment Income	5.5	13.6	40.0	83.5	62.8	25.1	5.3	2.4	5.6	6.0	5.0	6.6	7.9	14.3	22.2	34.8	38.9	39.1
General Fund Other	45.6	46.4	50.8	58.0	53.4	54.4	80.3	72.3	95.9	80.4	81.8	90.9	69.8	83.8	91.4	75.4	80.3	82.4
Property and Energy Credit	-5.6	-5.9	-5.6	-6.2	-6.4	-6.2	-6.4	-6.0	-6.8	-6.3	-6.0	-5.4	-6.0	-5.6	-5.6	-5.8	-6.0	-6.0
General Fund Total	**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**	**2,225.2**	**2,240.7**	**2,341.3**	**2,539.1**	**2,634.2**	**2,759.2**	**2,871.2**
GF & Earmarks Total	**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**	**2,721.0**	**2,783.8**	**2,926.7**	**3,182.6**	**3,324.8**	**3,554.1**	**3,695.5**
Individual Income Tax	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	2,852.0	2,889.8	3,157.7	3,370.3	3,609.5	3,999.0	4,320.0	4,602.6	4,886.6
Corporate Taxes	158.2	204.2	366.6	414.1	405.1	255.4	258.4	260.7	268.9	338.2	313.5	373.9	338.3	328.5	447.9	520.9	436.2	446.7
Mineral Production Withholding	17.3	16.7	22.7	23.1	23.8	32.5	24.6	26.7	28.3	26.1	32.4	27.1	15.6	15.1	21.6	28.8	27.1	26.7
Education Fund Other	4.5	0.0	9.8	18.2	20.1	19.3	24.6	26.6	25.2	27.8	23.2	21.5	25.4	27.1	30.9	39.0	38.8	39.5
Education Fund Total	**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**	**3,580.2**	**3,749.6**	**3,980.1**	**4,499.4**	**4,908.7**	**5,104.7**	**5,399.5**
GF/EF Total	**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**	**5,805.4**	**5,990.3**	**6,321.4**	**7,038.5**	**7,543.0**	**7,863.9**	**8,270.6**
GF/EF & Earmarks Total	**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**	**6,301.2**	**6,533.4**	**6,906.8**	**7,682.1**	**8,233.6**	**8,658.9**	**9,094.9**
Motor Fuel Tax	239.9	241.5	240.4	254.7	250.7	235.5	243.3	252.5	253.0	256.9	256.8	261.7	305.2	348.8	354.0	371.6	387.2	411.1
Special Fuel Tax	86.2	93.8	101.1	111.1	113.0	101.2	94.4	102.2	104.1	101.4	101.7	100.1	115.5	134.9	134.9	142.3	149.4	158.3
Other	64.9	70.0	76.6	78.8	82.4	85.4	73.6	80.7	79.2	81.2	82.0	85.1	89.7	89.8	95.5	106.0	111.1	116.0
Transportation Fund Total	**391.0**	**405.3**	**418.1**	**444.6**	**446.0**	**422.1**	**411.4**	**435.4**	**436.2**	**439.4**	**440.5**	**446.9**	**510.5**	**573.5**	**584.4**	**619.9**	**647.7**	**685.4**
Mineral Lease Payments	74.8	92.0	170.0	160.9	150.3	189.1	147.2	152.8	194.0	136.9	167.6	141.7	71.4	75.3	78.8	79.5	75.2	73.7
TOTAL	**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**	**6,027.8**	**6,394.1**	**6,572.2**	**6,970.2**	**7,701.8**	**8,242.4**	**8,586.8**	**9,029.7**
TOTAL & Earmarks	**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**	**6,327.4**	**6,480.3**	**6,889.8**	**7,115.3**	**7,555.6**	**8,345.3**	**8,933.0**	**9,381.7**	**9,854.0**

Note: GF = General Fund; EF = Education Fund

f = forecast prior to 2019 second special session SB2001, Tax Restructuring Revisions (does not include impacts of this bill).
Source: Utah State Tax Commission and Governor's Office of Management and Budget

Table 7.2: Change in Fiscal Year Revenue Collections
(annual percent change)

Revenue Source	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020f	2021f
Sales and Use Tax	8.8%	10.5%	2.9%	-6.4%	-11.0%	-9.4%	14.2%	-1.2%	2.1%	2.5%	3.5%	3.7%	4.4%	8.7%	4.8%	5.1%	4.6%
Earmarked Sales and Use Tax	7.3	138.5	149.6	30.1	-15.1	8.9	-37.2	75.6	27.1	7.2	9.6	9.5	7.8	9.9	7.3	15.1	3.7
Total Sales and Use Tax	8.8	13.7	10.6	-2.0	-11.7	-6.6	5.1	6.9	6.4	3.5	4.8	5.0	5.2	9.0	5.4	7.5	4.4
Cable/Satellite Excise Tax		75.8	1.7	15.5	3.0	2.0	0.3	13.0	-6.1	-3.5	9.5	0.6	9.4	-6.3	-3.7	-0.8	-0.4
Liquor Profits	1.1	24.2	12.5	12.2	-0.0	-2.2	6.8	13.6	14.9	7.9	8.7	9.0	2.2	5.6	5.2	2.7	4.1
Insurance Premiums	7.9	6.0	0.5	7.6	7.5	-3.6	-5.2	11.2	6.1	1.8	1.3	20.9	9.3	9.5	2.3	5.2	4.1
Beer, Cigarette, and Tobacco	-1.4	-1.8	2.6	0.7	-3.6	-3.1	113.8	-0.1	-3.6	-6.4	2.5	2.1	-1.7	-3.5	-5.4	-2.7	-3.4
Oil and Gas Severance Tax	45.9	33.7	-8.5	0.1	8.4	-20.8	6.5	9.5	-18.9	67.7	-21.8	-70.2	-55.2	87.4	-16.9	6.7	-0.6
Mining Severance Tax	90.0	48.9	38.5	12.5	-45.1	43.2	30.0	-6.3	-33.3	-6.4	3.1	-57.3	-1.9	11.3	31.7	9.8	3.2
Inheritance Tax	-69.5	152.3	-93.3	-80.9	236.7	-81.1	113.8	-100.0									
Investment Income	147.1	194.1	108.7	-24.8	-60.1	-78.8	-55.0	135.2	6.8	-16.3	30.4	21.0	80.3	55.0	56.9	11.9	0.4
General Fund Other	1.6	9.5	14.3	-8.0	1.8	47.6	-9.9	32.7	-16.1	1.7	11.1	-23.2	20.0	9.1	-17.5	6.4	2.7
Property and Energy Credit	5.6	-5.7	9.9	3.8	-2.6	2.4	-6.4	13.8	-7.7	-5.0	-9.2	10.2	-6.4	0.9	3.1	3.3	0.6
General Fund Total	**9.8**	**13.0**	**4.7**	**-5.5**	**-10.6**	**-7.9**	**14.9**	**1.5**	**0.4**	**3.6**	**3.0**	**0.7**	**4.5**	**8.4**	**3.7**	**4.7**	**4.1**
GF & Earmarks Total	**9.7**	**15.7**	**11.1**	**-2.0**	**-11.2**	**-5.8**	**7.3**	**7.8**	**4.0**	**4.2**	**4.1**	**2.3**	**5.1**	**8.7**	**4.5**	**6.9**	**4.0**
Individual Income Tax	13.8	18.2	12.5	1.5	-10.7	-9.3	9.2	7.0	16.0	1.3	9.3	6.7	7.1	10.8	8.0	6.5	6.2
Corporate Taxes	29.1	79.6	13.0	-2.2	-36.9	1.2	0.9	3.1	25.8	-7.3	19.3	-9.5	-2.9	36.4	16.3	-16.3	2.4
Mineral Production Withholding	-3.1	35.8	1.4	3.4	36.3	-24.4	8.7	6.2	-8.0	24.1	-16.1	-42.6	-3.0	42.7	33.3	-5.6	-1.6
Education Fund Other	-99.1	23,989.4	85.9	10.4	-3.8	27.4	8.1	-5.4	10.4	-16.6	-7.4	18.0	6.8	14.2	26.2	-0.6	1.7
Education Fund Total	**14.7**	**24.6**	**12.7**	**1.0**	**-13.8**	**-8.2**	**8.3**	**6.5**	**16.6**	**0.5**	**9.9**	**4.7**	**6.1**	**13.0**	**9.1**	**4.0**	**5.8**
GF/EF Total	**12.3**	**19.1**	**9.1**	**-1.8**	**-12.5**	**-8.1**	**11.1**	**4.3**	**9.7**	**1.7**	**7.1**	**3.2**	**5.5**	**11.3**	**7.2**	**4.3**	**5.2**
GF/EF & Earmarks Total	**12.3**	**20.3**	**12.0**	**-0.4**	**-12.6**	**-7.1**	**7.9**	**7.1**	**10.8**	**2.1**	**7.3**	**3.7**	**5.7**	**11.2**	**7.2**	**5.2**	**5.0**
Motor Fuel Tax	0.6	-0.4	5.9	-1.6	-6.1	3.3	3.8	0.2	1.5	-0.0	1.9	16.6	14.3	1.5	5.0	4.2	6.2
Special Fuel Tax	8.9	7.7	9.9	1.7	-10.4	-6.7	8.2	1.9	-2.6	0.3	-1.6	15.4	16.8	-0.0	5.5	5.0	5.9
Other	7.9	9.5	2.8	4.6	3.7	-13.8	9.6	-1.9	2.5	1.1	3.7	5.4	0.1	6.4	10.9	4.8	4.4
Transportation Fund Total	**3.7**	**3.2**	**6.3**	**0.3**	**-5.4**	**-2.5**	**5.8**	**0.2**	**0.7**	**0.3**	**1.5**	**14.2**	**12.3**	**1.9**	**6.1**	**4.5**	**5.8**
Mineral Lease Payments	23.0	84.8	-5.4	-6.5	25.8	-22.2	3.8	27.0	-29.4	22.4	-15.4	-49.6	5.4	4.7	0.8	-5.4	-1.9
TOTAL	**11.7**	**19.0**	**8.5**	**-1.8**	**-11.0**	**-8.1**	**10.4**	**4.6**	**7.6**	**2.1**	**6.1**	**2.8**	**6.1**	**10.5**	**7.0**	**4.2**	**5.2**
TOTAL & Earmarks	**11.7**	**20.1**	**11.0**	**-0.5**	**-11.2**	**-7.3**	**7.6**	**7.1**	**8.7**	**2.4**	**6.3**	**3.3**	**6.2**	**10.5**	**7.0**	**5.0**	**5.0**

Note: GF = General Fund; EF = Education Fund
f = forecast prior to 2019 second special session SB2001, Tax Restructuring Revisions (does not include impacts of this bill).
Source: Utah State Tax Commission and Governor's Office of Management and Budget

Exports

8

John Gilbert, Utah State University
McKinley Nicholas, Utah State University
James Porter, World Trade Center Utah

2019 OVERVIEW

In contrast to the downward trend in Utah's merchandise exports that we have observed over the last few years, Utah's 2018 exports rose by just over 24.0% over 2017, to a total of $14.4 billion. Utah gained significantly in export competitiveness relative to other US states. The total change in the value of US exports from 2017 to 2018 was only 7.7%, and Utah improved from 29th in the nation in 2017 to become the 27th largest exporting state in 2018.

When comparing metropolitan areas in Utah, Salt Lake City remains the largest exporting area in the state, with 23.0% growth in exports over the previous year, from $7.9 billion in 2017 to 9.7 billion dollars in 2018. With this increase, the Salt Lake City Metropolitan area has gone from generating 62.0% of total exports for the state (in 2017) to 67.8% in 2018. The Provo area saw a 13.4% decrease in its exports, moving from $2.1 billion in exports to $1.8 billion, and bringing its share of total Utah exports to 12.4%. Ogden, on the other hand, saw an increase of 11.7%, climbing to approximately $1.8 billion from its previous $1.6 billion in exports, bringing its new share of total exports to 12.3% and almost surpassing Provo. The Logan area also saw a sizeable increase in their exports, 13.7%. This brought total exports to $573 million (up from $504 million in 2017), just under 4.0% of total exports statewide.

Primary metal products remain Utah's leading export category, with an export value of $6.4 billion in 2018, an increase of approximately 65.0% from 2017, and a reversal of the downward trend in exports from this sector over the last several years. The primary metal products sector accounted for approximately 45.0% of Utah's total exports, a substantial increase in the export reliance on this sector over 2017. Other major categories in 2018 were computers and electronics ($1.6 billion, 11.0% of total), chemicals ($1.2 billion, 8.6% of total), food products ($1 billion, of total), and transportation equipment ($884 million, 6.0% of total).

2018 saw a decrease in computer and electronic exports of 15.0% ($279 million). The chemical industry grew by 11.5% over 2017 (a $128 million increase). With this increase, the chemical industry bumped its share of total Utah exports up to 8.6%, solidifying its place in the top three export categories, and putting it on par with Utah's agricultural and food production sectors in total. Other notable changes in the sectoral structure of Utah's exports include a 62.0% increase in exports of waste and scrap, an $85 million increase in export value to $222 million.

The United Kingdom remains the largest consumer of Utah's exports, with 2018 export values at $5.1 billion, making up 35.4% of Utah's total exports. Canada comes in a distant second with 2018 exports values at $1.8 billion, making up a much more modest 12.4% of Utah's total exports. Japan comes third with $812 million and 5.6% of the total. Behind Japan is Hong Kong with $738 million (5.1% of the total), followed closely by Mexico with $726 million (5.0% of the total).

There were some significant changes in the regional pattern of exports relative to 2017. There was large growth in exports from Utah to the United Kingdom, up from $2.3 billion to $5.1 billion, a rise of nearly 120.0%. The vast majority of this increase was in primary metals. By contrast, there was a dramatic decline in exports from Utah to East Asia, especially Hong Kong (down 54.0%), which dropped from being Utah's 2nd largest export market to 4th, Singapore (also down 54.0%, and dropping well out of the top 10 export markets), and China (dropping 22.0% and falling from 4th to 7th). These are markets that had been growing rapidly in recent years.

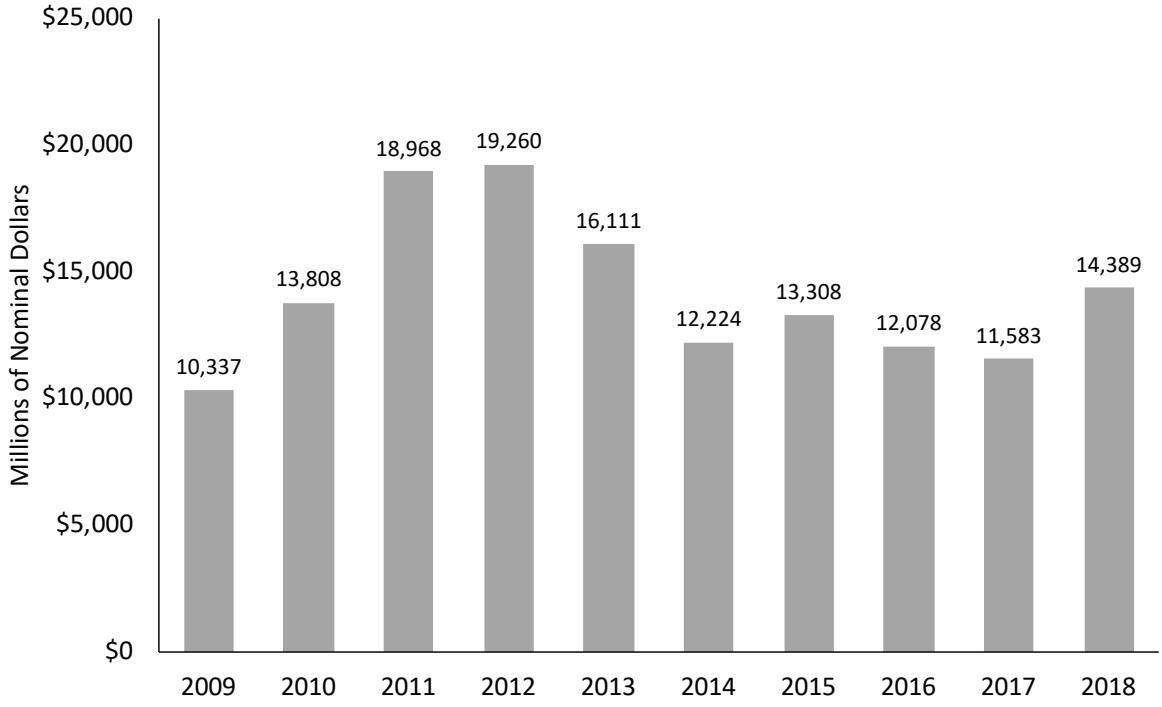
2020 OUTLOOK

Utah has benefited greatly from international trade and open markets in terms of job creation over the last decade. The global trade system has, however, been roiled by numerous shocks in the last several years. While Utah has managed to weather these shocks better than some other states so far, ongoing uncertainty remains.

The prolonged trade dispute with China is problematic. Utah's exports to China and Hong Kong (much of which is ultimately directed to the mainland) fell by 44.0% in 2018, a loss of $1.3 billion in export value. This is particularly concerning given that China has been a high growth export market, and also one to which Utah's exports have been relatively diverse along the sectoral dimension (as opposed to the United Kingdom, with which trade is almost entirely in gold).

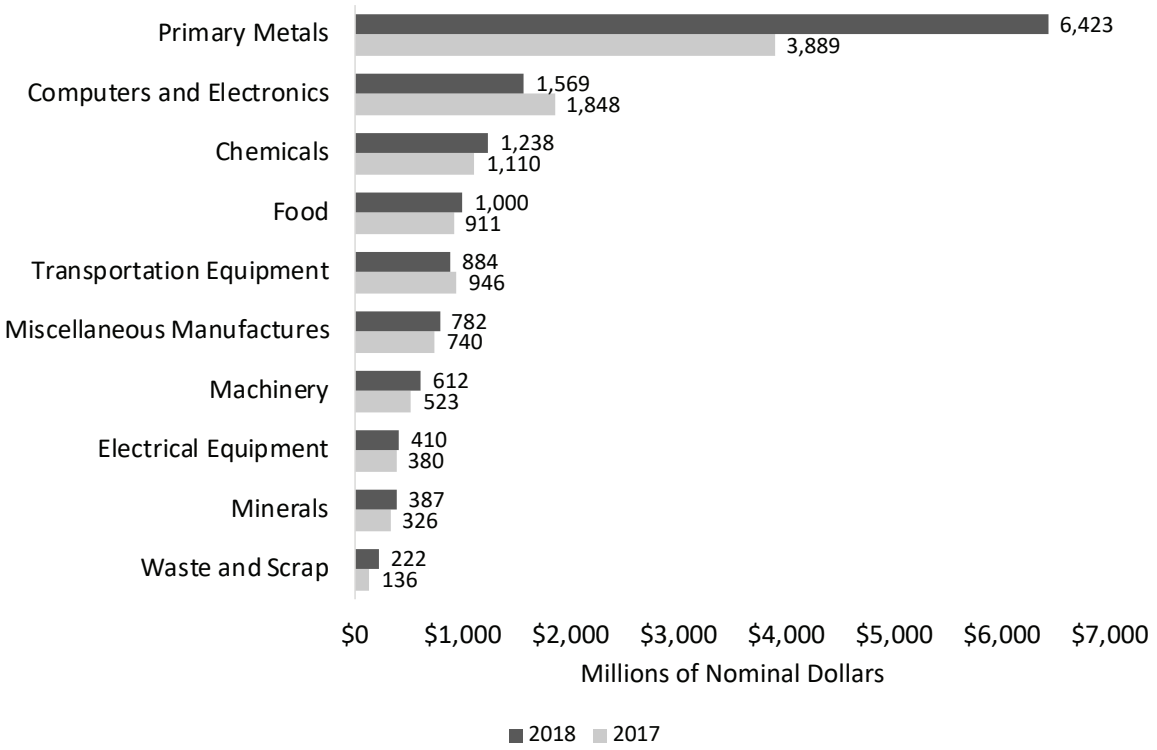
In the absence of progress in China/US trade negotiations, the retaliatory tariffs being imposed by both countries will cause further market erosion. China is the largest single market for Utah's agricultural production, which presents additional risk for Utah's agricultural sector.

Figure 8.1: Utah Merchandise Exports



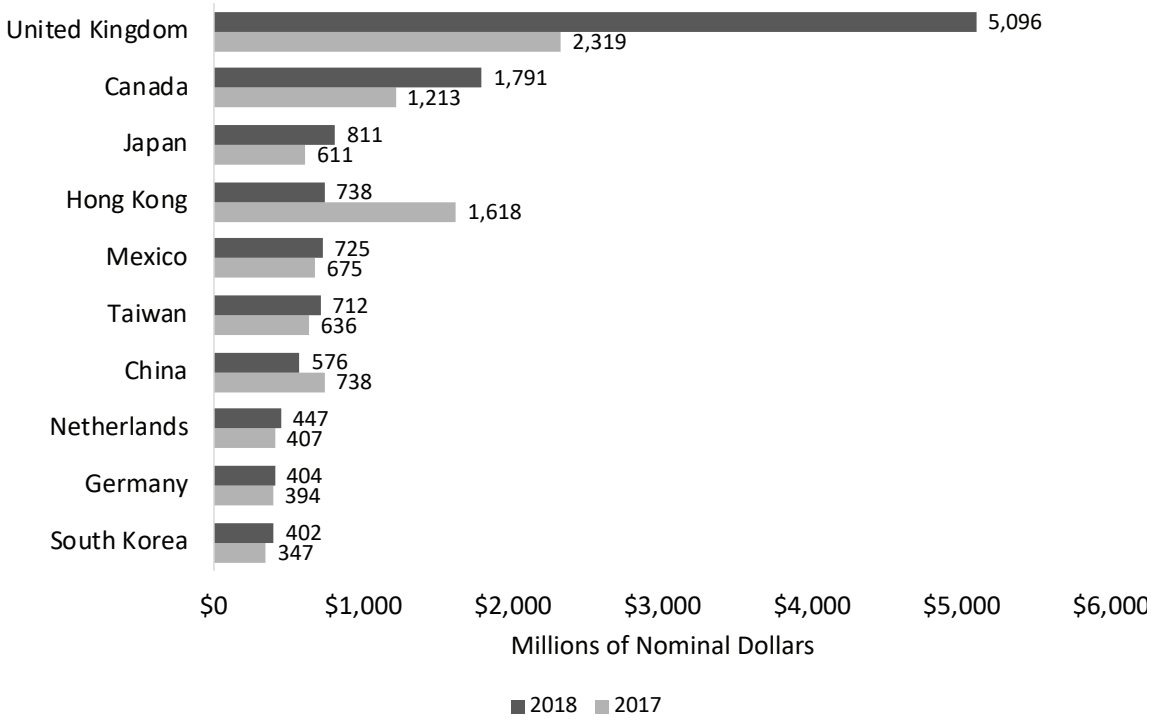
Source: U.S. Census Bureau, USA Trade Online

Figure 8.2: Utah Merchandise Exports of Top Ten Export Industries



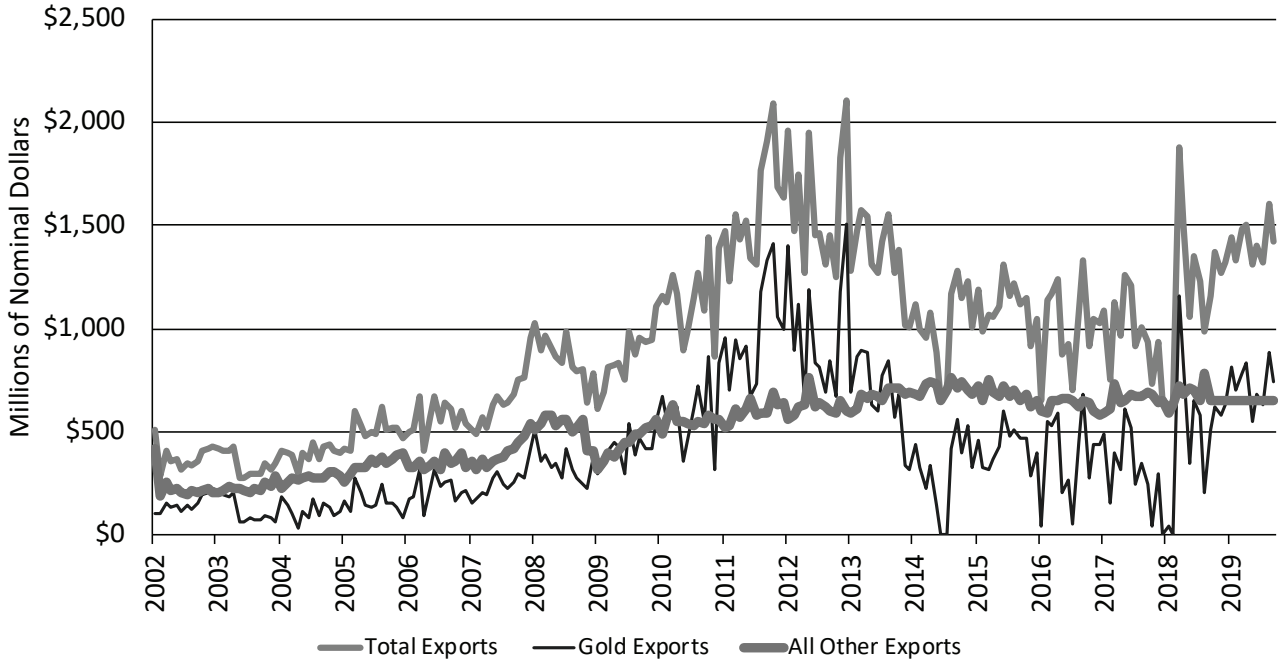
Source: U.S. Census Bureau, USA Trade Online

Figure 8.3: Utah Merchandise Exports to Top Ten Purchasing Countries



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

Figure 8.4: Utah Monthly Exports: With and Without Gold



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

Table 8.1: U.S. Merchandise Exports by State

2018 Rank	State	Millions of Current Dollars						2017–18 Change	2018 Share
		2013	2014	2015	2016	2017	2018		
	United States	$1,578,517	$1,621,874	$1,503,101	$1,451,011	$1,546,273	$1,665,992	7.7%	100%
23	Alabama	19,301.3	19,450.4	19,328.2	20,422.1	21,786.3	21,416.7	-1.7%	1.3%
40	Alaska	4,527.8	5,111.2	4,619.7	4,347.5	4,942.5	4,840.5	-2.1%	0.3%
21	Arizona	19,478.3	21,247.3	22,655.4	22,016.2	20,916.9	22,508.7	7.6%	1.4%
37	Arkansas	7,160.8	6,866.2	5,869.5	5,707.5	6,234.4	6,447.0	3.4%	0.4%
2	California	168,191.6	173,868.6	165,379.6	163,512.8	172,012.4	178,181.1	3.6%	10.7%
33	Colorado	8,545.0	8,363.7	7,950.3	7,580.3	8,054.1	8,328.8	3.4%	0.5%
25	Connecticut	16,426.7	15,962.8	15,242.4	14,394.2	14,783.7	17,403.4	17.7%	1.0%
41	Delaware	5,327.3	5,267.4	5,407.8	4,532.4	4,565.6	4,713.6	3.2%	0.3%
46	Dist of Columbia	2,707.7	940.2	1,088.1	1,330.7	1,483.1	2,724.6	83.7%	0.2%
8	Florida	60,482.2	58,438.8	53,899.6	52,049.4	54,914.3	57,236.6	4.2%	3.4%
11	Georgia	37,578.2	39,412.7	38,595.3	35,644.3	37,223.8	40,613.3	9.1%	2.4%
51	Hawaii	598.7	1,447.5	1,896.4	795.5	952.4	659.8	-30.7%	0.0%
42	Idaho	5,789.4	5,137.8	4,294.8	4,876.8	3,864.1	4,021.7	4.1%	0.2%
6	Illinois	66,212.9	68,394.0	63,401.9	59,757.9	65,187.0	65,491.4	0.5%	3.9%
12	Indiana	34,216.0	35,589.1	33,818.8	34,655.0	37,737.1	39,330.3	4.2%	2.4%
28	Iowa	13,903.4	15,111.5	13,233.6	12,115.4	13,399.0	14,377.1	7.3%	0.9%
31	Kansas	12,459.2	12,021.9	10,690.2	10,181.4	11,243.5	11,586.7	3.1%	0.7%
17	Kentucky	25,411.7	27,757.4	27,643.9	29,199.2	30,857.3	31,809.8	3.1%	1.9%
5	Louisiana	63,247.0	64,770.1	48,685.9	48,418.8	57,005.3	67,297.1	18.1%	4.0%
45	Maine	2,686.8	2,811.1	2,763.0	2,875.3	2,711.9	2,836.6	4.6%	0.2%
29	Maryland	11,746.7	12,228.3	10,051.8	9,658.2	9,317.5	12,102.3	29.9%	0.7%
18	Massachusetts	26,812.0	27,384.2	25,290.1	25,891.7	27,565.8	27,158.0	-1.5%	1.6%
7	Michigan	59,399.8	57,573.1	53,954.0	54,713.5	59,870.4	58,034.8	-3.1%	3.5%
20	Minnesota	20,760.1	21,397.6	20,016.2	19,202.4	20,691.9	22,677.0	9.6%	1.4%
30	Mississippi	12,415.2	11,484.9	10,848.4	10,494.7	10,994.6	11,630.2	5.8%	0.7%
26	Missouri	12,958.2	14,189.6	13,647.8	13,934.6	14,206.2	14,530.5	2.3%	0.9%
48	Montana	1,505.8	1,544.9	1,404.1	1,360.1	1,616.0	1,666.4	3.1%	0.1%
35	Nebraska	7,393.0	7,889.7	6,663.4	6,380.4	7,206.4	7,952.2	10.3%	0.5%
32	Nevada	8,701.1	7,691.7	8,666.5	9,763.2	12,162.5	11,094.3	-8.8%	0.7%
39	New Hampshire	3,511.0	4,233.2	4,001.3	4,143.0	5,147.9	5,306.1	3.1%	0.3%
13	New Jersey	36,611.9	36,587.0	32,063.6	31,222.8	34,486.3	35,354.2	2.5%	2.1%
43	New Mexico	2,726.1	3,801.6	3,781.3	3,631.6	3,609.6	3,656.8	1.3%	0.2%
3	New York	86,407.2	88,834.3	83,134.5	76,720.2	77,914.6	84,683.2	8.7%	5.1%
15	North Carolina	29,347.1	31,420.0	30,201.8	30,161.3	32,622.5	32,761.5	0.4%	2.0%
36	North Dakota	4,401.7	5,513.1	4,026.8	5,313.3	5,835.5	7,894.1	35.3%	0.5%
9	Ohio	51,048.2	52,641.4	51,156.6	49,298.8	50,102.8	54,403.8	8.6%	3.3%
38	Oklahoma	6,919.7	6,308.3	5,250.7	5,047.9	5,364.4	6,108.4	13.9%	0.4%
22	Oregon	18,633.6	20,888.8	20,085.7	21,752.6	21,895.2	22,334.8	2.0%	1.3%
10	Pennsylvania	41,180.8	40,410.8	39,437.3	36,484.4	38,701.9	41,192.6	6.4%	2.5%
47	Rhode Island	2,164.1	2,388.5	2,132.7	2,277.8	2,391.7	2,406.6	0.6%	0.1%
14	South Carolina	26,341.2	29,773.0	30,988.7	31,321.9	32,199.1	34,628.6	7.5%	2.1%
49	South Dakota	1,582.2	1,577.6	1,420.0	1,223.4	1,359.7	1,436.7	5.7%	0.1%
16	Tennessee	32,473.7	33,250.9	32,587.8	31,432.7	33,246.1	32,710.5	-1.6%	2.0%
1	Texas	277,715.5	285,559.3	248,605.7	231,106.7	264,541.4	315,938.5	19.4%	19.0%
27	**Utah**	**16,111.2**	**12,224.1**	**13,308.4**	**12,077.7**	**11,583.3**	**14,388.7**	**24.2%**	**0.9%**
44	Vermont	4,026.5	3,669.6	3,181.5	2,989.8	2,776.0	2,920.0	5.2%	0.2%
24	Virginia	17,896.1	19,390.8	17,801.3	16,313.2	16,508.6	18,352.9	11.2%	1.1%
4	Washington	81,630.0	90,558.3	86,378.7	79,559.5	76,413.7	77,968.2	2.0%	4.7%
34	West Virginia	8,731.7	7,597.0	5,833.1	5,045.4	7,110.5	8,216.9	15.6%	0.5%
19	Wisconsin	23,110.5	23,425.6	22,438.3	21,021.2	22,306.1	22,721.3	1.9%	1.4%
50	Wyoming	1,350.6	1,757.3	1,175.0	1,098.1	1,196.4	1,356.9	13.4%	0.1%

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

Table 8.2: Utah Merchandise Exports by Industry

2018 Rank	Code	Industry Name	Millions of Current Dollars						2017–18 Change	2018 Share
			2013	2014	2015	2016	2017	2018		
		All Commodities	**$16,111.2**	**$12,224.1**	**$13,308.4**	**$12,077.7**	**$11,583.3**	**$14,388.7**	**24.2%**	**100%**
13	111	Agricultural Products	61.5	77.1	101.6	90.8	86.1	115.6	34.4%	0.8%
26	112	Livestock and Livestock Products	6.9	10.4	6.0	4.5	5.3	8.2	54.2%	0.1%
30	113	Forestry Products	1.7	1.7	1.4	1.9	1.5	1.5	-0.8%	0.0%
29	114	Fish and Other Marine Products	1.5	0.8	0.6	0.9	1.0	1.7	65.5%	0.0%
27	211	Oil and Gas	48.0	5.9	0.0	0.0	0.3	5.0	1570.3%	0.0%
9	212	Minerals	172.7	370.2	317.5	128.6	325.6	386.6	18.8%	2.7%
4	311	Food	955.8	992.7	932.9	922.3	911.2	999.5	9.7%	6.9%
15	312	Beverages	20.0	29.4	38.7	29.5	28.5	39.2	37.6%	0.3%
19	313	Raw Textiles	12.0	15.7	39.1	79.4	61.6	26.5	-57.0%	0.2%
23	314	Milled Textiles	18.7	25.4	21.1	22.2	22.3	19.0	-14.9%	0.1%
24	315	Apparel and Accessories	10.8	13.7	14.8	12.1	13.1	14.7	12.5%	0.1%
21	316	Leather	18.5	20.5	18.8	17.1	22.4	23.1	2.8%	0.2%
25	321	Wood Products	3.5	4.4	3.4	5.4	7.9	9.4	18.3%	0.1%
16	322	Paper	27.6	31.7	28.1	32.1	29.2	32.7	11.8%	0.2%
20	323	Printed Material	23.0	28.0	18.7	23.2	21.2	24.9	17.4%	0.2%
28	324	Petroleum and Coal Products	13.1	8.8	11.4	19.4	5.7	4.9	-14.4%	0.0%
3	325	Chemicals	829.8	1,047.0	1,095.5	1,063.3	1,109.9	1,237.8	11.5%	8.6%
11	326	Plastics and Rubber Products	186.5	191.3	178.0	161.9	175.6	206.0	17.3%	1.4%
14	327	Nonmetallic Minerals	30.4	44.7	43.1	43.1	61.5	59.8	-2.7%	0.4%
1	331	Primary Metals	8,321.5	4,113.4	5,562.5	4,854.4	3,888.5	6,423.2	65.2%	44.6%
12	332	Fabricated Metals	231.2	221.4	198.7	174.0	155.4	192.0	23.5%	1.3%
7	333	Machinery	521.3	495.3	522.1	497.8	523.4	612.3	17.0%	4.3%
2	334	Computers and Electronics	2,681.0	2,349.4	2,121.4	1,718.1	1,847.8	1,569.3	-15.1%	10.9%
8	335	Electrical Equipment	267.3	307.9	331.5	371.6	380.0	410.1	7.9%	2.9%
5	336	Transportation Equipment	802.4	905.5	811.9	865.8	945.8	884.4	-6.5%	6.1%
17	337	Furniture and Fixtures	32.6	35.2	48.2	34.9	26.3	30.9	17.7%	0.2%
6	339	Miscellaneous Manufactures	596.1	656.0	634.7	701.9	740.1	782.1	5.7%	5.4%
32	511	Publications	0.0	0.0	0.0	0.0	0.0	0.0	0.0%	0.0%
10	910	Waste and Scrap	141.1	121.8	168.6	159.3	136.5	221.5	62.3%	1.5%
22	920, 930	Used Merchandise	36.4	34.5	13.4	12.3	15.9	19.7	24.0%	0.1%
31	980	Goods Returned	0.3	0.5	0.2	0.1	0.2	0.1	-22.2%	0.0%
18	990	Other Special Classification	37.9	63.8	24.6	29.9	33.8	27.1	-19.7%	0.2%

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

Table 8.3: Utah Merchandise Exports by Purchasing Country and Region

2018 Rank	Country	Millions of Current Dollars						2017–18 Change	2018 Share
		2013	2014	2015	2016	2017	2018		
	World Total	**$16,111.2**	**$12,224.1**	**$13,307.6**	**$12,077.6**	**$11,583.4**	**$14,388.7**	**24.2%**	**100%**
1	United Kingdom	1,293.3	1,415.2	3,036.6	3,074.0	2,318.7	5,095.9	119.8%	35.4%
2	Canada	1,323.5	1,423.1	1,491.9	1,322.7	1,212.6	1,791.2	47.7%	12.4%
3	Japan	628.2	552.7	547.7	504.0	611.3	811.5	32.7%	5.6%
4	Hong Kong	5,527.6	1,760.6	1,947.3	1,506.8	1,618.1	738.2	-54.4%	5.1%
5	Mexico	546.8	742.0	853.9	740.9	674.7	725.5	7.5%	5.0%
6	Taiwan	476.6	676.8	710.2	610.1	636.0	712.2	12.0%	4.9%
7	China	1,412.7	891.7	841.0	648.3	738.0	575.9	-22.0%	4.0%
8	Netherlands	254.5	387.8	364.9	448.6	406.7	447.1	9.9%	3.1%
9	Germany	228.3	255.8	266.5	343.3	394.0	404.5	2.7%	2.8%
10	South Korea	341.1	403.7	376.8	318.3	347.0	402.0	15.9%	2.8%
11	Australia	161.6	184.3	190.5	189.5	250.5	273.2	9.0%	1.9%
12	India	311.3	240.3	201.7	101.5	58.7	224.3	282.0%	1.6%
13	France	109.0	113.6	129.8	172.0	180.9	216.1	19.5%	1.5%
14	Singapore	644.4	545.4	358.7	291.2	396.1	180.9	-54.3%	1.3%
15	Switzerland	268.5	254.7	219.1	209.0	98.5	165.0	67.5%	1.1%
16	Italy	168.1	139.9	167.4	173.4	194.0	162.2	-16.4%	1.1%
17	Belgium	141.3	268.0	127.5	87.6	98.0	128.1	30.7%	0.9%
18	Brazil	117.6	113.7	92.8	103.2	155.8	103.7	-33.5%	0.7%
19	Spain	45.7	52.4	44.8	63.2	79.9	93.3	16.8%	0.6%
20	Malaysia	103.1	97.4	98.1	75.9	91.3	84.2	-7.8%	0.6%
21	Israel	56.1	59.3	40.6	49.4	57.1	63.5	11.2%	0.4%
22	Philippines	155.5	164.2	112.6	47.8	49.3	63.2	28.2%	0.4%
23	Thailand	835.3	532.9	147.6	129.7	63.3	57.7	-8.9%	0.4%
24	Austria	11.7	10.6	46.5	58.5	48.2	45.5	-5.6%	0.3%
25	Chile	61.3	73.5	66.2	34.0	59.2	42.9	-27.5%	0.3%
26	Indonesia	63.7	36.8	58.5	33.7	37.8	41.0	8.3%	0.3%
27	United Arab Emirates	46.9	38.3	68.9	38.5	38.5	40.7	5.8%	0.3%
28	Viet Nam	17.7	21.5	28.6	26.2	30.5	37.8	23.8%	0.3%
29	Turkey	35.0	77.4	26.5	36.2	34.1	34.9	2.4%	0.2%
30	Ireland	38.3	24.6	44.0	36.6	40.3	32.5	-19.5%	0.2%
31	Ecuador	17.8	22.8	18.5	22.1	26.4	31.4	19.0%	0.2%
32	Costa Rica	34.3	15.6	23.7	32.9	28.6	31.1	8.7%	0.2%
33	Colombia	19.2	22.9	27.3	17.8	17.9	30.2	69.0%	0.2%
34	Sweden	43.1	44.5	45.3	43.0	26.3	28.2	7.0%	0.2%
35	Poland	25.1	24.2	29.7	42.8	35.5	27.4	-22.6%	0.2%

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

Table 8.4: Utah Merchandise Exports to Top Ten Purchasing Countries by Industry: 2018

Code	Industry Name	Millions of Current Dollars										
		United Kingdom	Hong Kong	Canada	China	Mexico	Taiwan	Japan	Netherlands	Singapore	Germany	10-Country Industry Total
	All Commodities	**$5,095.9**	**$1,791.2**	**$811.5**	**$738.2**	**$725.5**	**$712.2**	**$575.9**	**$447.1**	**$404.5**	**$402.0**	**$11,703.9**
111	Agricultural Products	0.0	0.6	20.8	0.0	2.5	2.9	71.3	0.1	0.1	7.8	106.1
112	Livestock and Livestock Products	0.0	0.1	0.0	0.5	3.8	0.0	1.7	0.0	0.0	0.0	6.1
113	Forestry Products	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.7
114	Fish and Other Marine Products	0.3	0.2	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0	1.3
211	Oil and Gas	0.0	0.1	0.0	0.0	4.8	0.0	0.0	0.0	0.0	0.0	5.0
212	Minerals	0.2	9.5	170.4	0.8	83.5	0.1	1.1	2.5	0.7	25.2	294.2
311	Food	7.2	92.5	76.3	79.1	63.6	78.3	35.0	29.6	1.4	131.5	594.5
312	Beverages	0.3	1.7	3.8	5.4	7.9	1.6	0.2	9.9	0.0	0.4	31.2
313	Raw Textiles	0.1	1.9	2.2	0.0	13.3	0.1	0.3	0.3	0.6	0.0	18.9
314	Milled Textiles	0.3	8.2	0.9	0.0	1.4	0.9	0.2	0.6	0.2	1.8	14.6
315	Apparel and Accessories	0.5	2.6	1.1	0.1	1.8	0.1	0.2	0.5	1.5	2.3	10.7
316	Leather	0.4	3.2	1.6	0.1	2.6	0.1	0.1	9.6	0.4	2.1	20.2
321	Wood Products	0.2	3.7	0.0	0.0	2.4	0.1	0.0	0.3	0.0	0.0	6.7
322	Paper	1.2	8.0	0.2	1.0	4.9	0.1	4.3	1.3	2.6	0.2	23.7
323	Printed Material	0.7	4.5	0.1	6.5	2.4	0.1	0.3	1.0	0.6	0.0	16.3
324	Petroleum and Coal Products	0.0	3.8	0.0	0.0	0.7	0.0	0.2	0.0	0.0	0.0	4.8
325	Chemicals	27.3	208.5	94.7	33.2	64.8	39.6	93.3	108.6	24.3	91.0	785.3
326	Plastics and Rubber Products	25.1	72.0	12.1	0.7	21.1	1.3	13.7	2.3	2.7	6.1	157.1
327	Nonmetallic Minerals	0.8	25.2	1.0	0.2	2.6	1.6	1.8	0.6	0.1	0.5	34.3
331	Primary Metals	4,874.6	632.2	50.9	556.4	15.5	0.0	1.2	0.2	4.8	27.7	6,163.5
332	Fabricated Metals	6.3	72.9	3.1	0.7	15.6	0.7	8.9	1.3	18.4	1.2	128.9
333	Machinery	20.4	143.9	22.5	6.2	41.9	17.2	65.3	12.9	24.2	21.9	376.5
334	Computers and Electronics	47.9	101.6	147.9	30.2	40.7	555.6	118.2	29.9	80.8	32.6	1,185.6
335	Electrical Equipment	13.0	51.6	10.9	1.1	65.5	4.7	20.4	14.5	69.7	3.9	255.2
336	Transportation Equipment	42.3	150.7	68.1	0.9	204.6	1.6	12.5	2.0	135.8	18.2	636.6
337	Furniture and Fixtures	0.6	13.0	0.3	0.1	9.1	0.0	0.3	0.3	0.5	0.3	24.5
339	Miscellaneous Manufactures	24.9	61.1	116.3	10.2	15.7	1.7	81.7	218.4	33.9	18.1	581.9
511	Publications	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
910	Waste and Scrap	0.0	108.7	4.3	3.3	30.7	3.7	42.2	0.2	0.0	8.6	201.7
920, 930	Used Merchandise	0.3	2.6	0.4	0.4	2.0	0.1	0.8	0.1	0.5	0.1	7.3
980	Goods Returned	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1
990	Other Special Classification	1.0	5.8	1.6	0.2	0.1	0.1	0.7	0.1	0.7	0.3	10.7

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

Price Inflation and Cost of Living

9

David Stringfellow, Office of the Utah State Auditor

Introduction

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

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

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

2019 OVERVIEW

Through October 2019, the headline CPI index has risen 1.8% over the last year, compared to 2.4% on average in 2018. This is also the average rate of inflation that has happened each year since 2009. Current inflation is still about 1.0 percentage point lower than what was normal between 1980 and 2008.

Third-quarter 2019 inflation (from the PCE) reads lower at 1.4%, but is consistent with slowing inflation.

Medical care and housing became relatively more expensive this year while fuel and clothing prices fell. Since the end of the last recession, car insurance is up over 60.0%—but this growth flattened in 2019. Over this period, education prices have grown over 40.0% and medical care prices are 30.0% higher. Housing prices have accelerated beyond the general price level since 2016. The price of utilities, vehicles, recreation, clothing, and motor fuel has grown slower than general prices.

Motor fuel prices fluctuate widely but are at about the same level as a decade ago. Since last year, average fuel prices fell 7.4%. Communication services (of the same quality) continue to get cheaper. The long-term trend of inflation is clear, about $12 in 1960 could buy the same amount of similar goods as $100 in 2019. In the 1980s, items that cost about $45 would now cost around $100 to purchase.

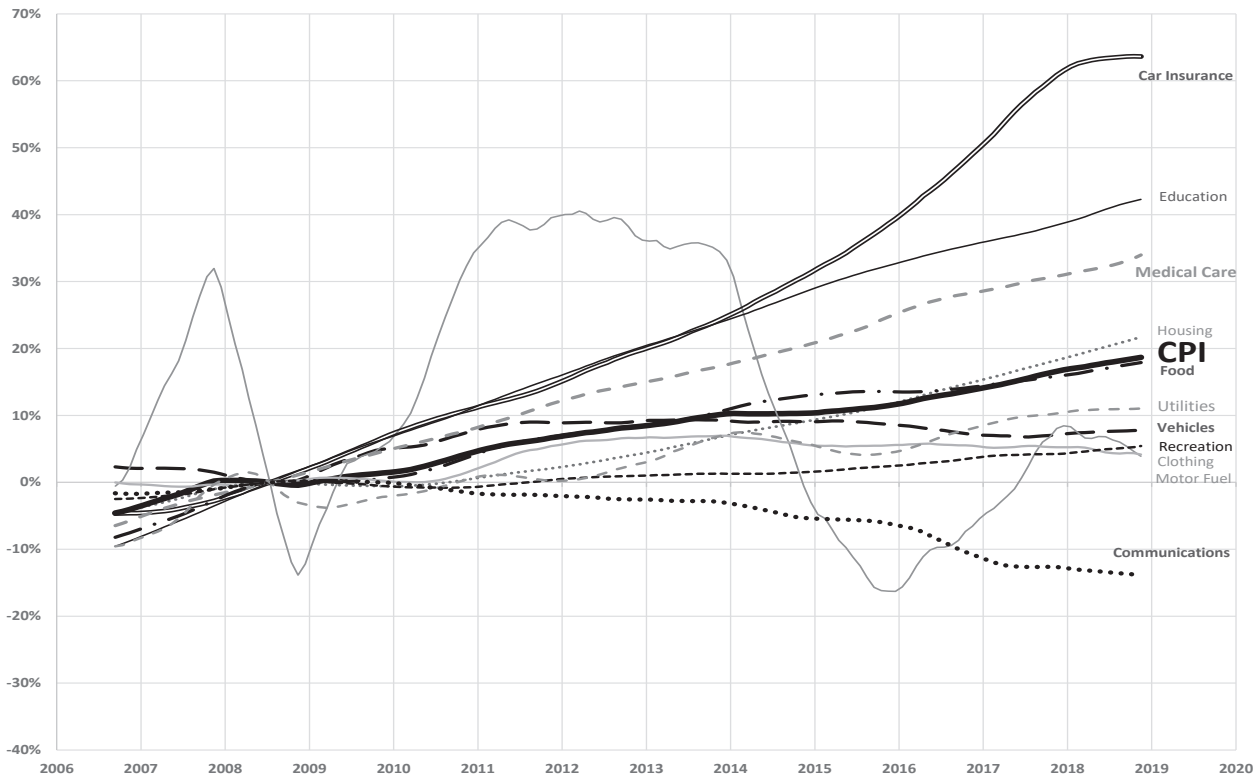
The Federal Reserve reversed a three-year trend of interest rate increases. In July 2019, the first time in a decade, the Federal Open Market Committee (FOMC) lowered target rates from 2.0-2.25% to 1.5-1.75% by December 2019. FOMC wants to avoid "conveying a more negative economic outlook" than they expect– they believe the labor market remains strong and the economy will rise at a moderate rate.

Regional Price Parities (RPPs) measure cost of living across states and help give a sense for cost differences by geographic region. The most recent RPP data is from 2017. Utah's RPP is 97, indicating that the cost of living in Utah is a little lower than the national average. Goods are about 3.0% cheaper to acquire in Utah, while housing proxies are roughly 6.0% less than found in the rest of the country.

2020 OUTLOOK

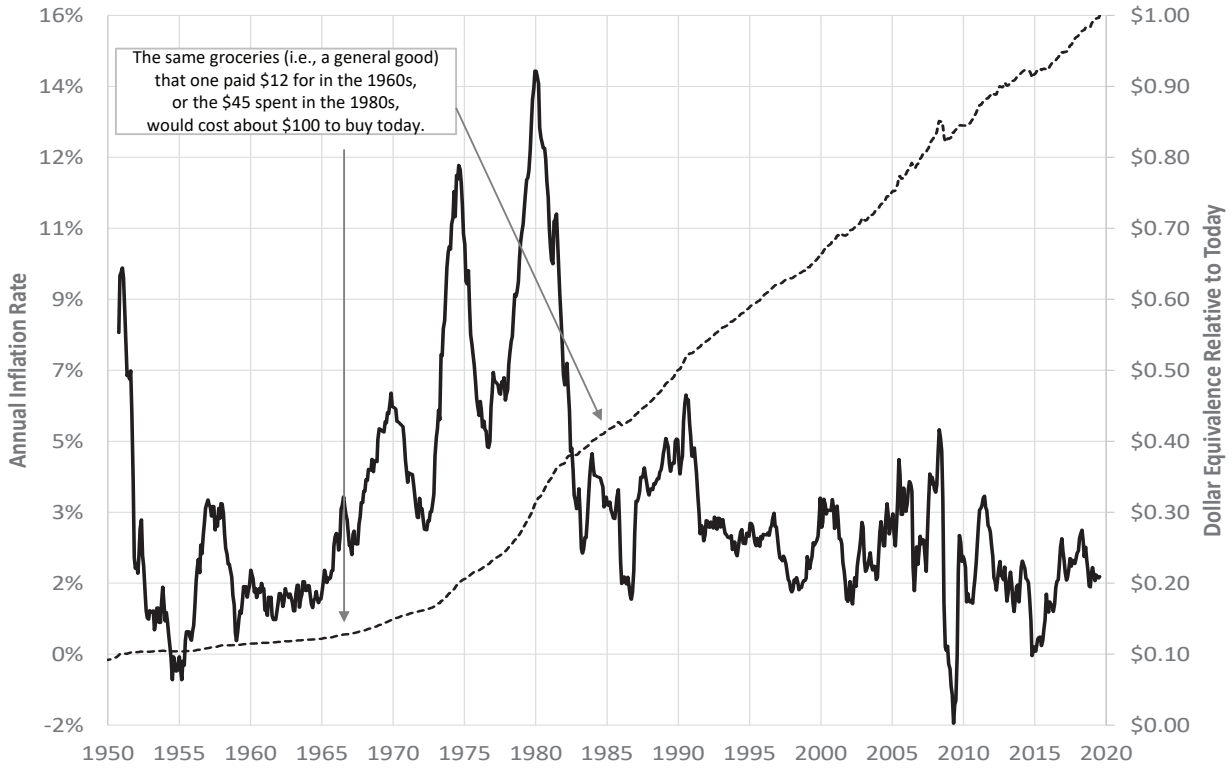
Inflation for 2020 is expected to be below 2.0% as global pressures push inflation risk down in the short-term. With the economy flirting with inverted yield curves, the medium and long-term inflation outlook appears stable, but deflation risk has grown.

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



Source: Calculations from CPI data

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



Source: Calculations from CPI data

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

Year	January	February	March	April	May	June	July	August	September	October	November	December	Annual	Annual Change
1960	29.4	29.4	29.4	29.5	29.6	29.6	29.6	29.6	29.6	29.8	29.8	29.8	29.6	-
1961	29.8	29.8	29.8	29.8	29.8	29.8	29.9	29.9	30.0	30.0	30.0	30.0	29.9	1.1%
1962	30.0	30.1	30.2	30.2	30.2	30.2	30.2	30.3	30.4	30.4	30.4	30.4	30.3	1.2%
1963	30.4	30.5	30.5	30.5	30.5	30.6	30.7	30.8	30.7	30.8	30.8	30.9	30.6	1.3%
1964	30.9	30.9	30.9	31.0	31.0	31.0	31.0	31.1	31.1	31.1	31.2	31.3	31.0	1.3%
1965	31.3	31.3	31.3	31.4	31.5	31.6	31.6	31.6	31.6	31.7	31.8	31.9	31.5	1.6%
1966	31.9	32.1	32.2	32.3	32.4	32.4	32.5	32.7	32.8	32.9	32.9	32.9	32.5	3.0%
1967	32.9	33.0	33.0	33.1	33.1	33.3	33.4	33.5	33.6	33.7	33.9	34.0	33.4	2.8%
1968	34.1	34.2	34.3	34.4	34.5	34.7	34.9	35.0	35.1	35.3	35.4	35.6	34.8	4.2%
1969	35.7	35.8	36.1	36.3	36.4	36.6	36.8	36.9	37.1	37.3	37.5	37.7	36.7	5.4%
1970	37.9	38.1	38.3	38.5	38.6	38.8	38.9	39.0	39.2	39.4	39.6	39.8	38.8	5.9%
1971	39.9	39.9	40.0	40.1	40.3	40.5	40.6	40.7	40.8	40.9	41.0	41.1	40.5	4.2%
1972	41.2	41.4	41.4	41.5	41.6	41.7	41.8	41.9	42.1	42.2	42.4	42.5	41.8	3.3%
1973	42.7	43.0	43.4	43.7	43.9	44.2	44.2	45.0	45.2	45.6	45.9	46.3	44.4	6.3%
1974	46.8	47.3	47.8	48.1	48.6	49.0	49.3	49.9	50.6	51.0	51.5	51.9	49.3	11.0%
1975	52.3	52.6	52.8	53.0	53.1	53.5	54.0	54.2	54.6	54.9	55.3	55.6	53.8	9.1%
1976	55.8	55.9	56.0	56.1	56.4	56.7	57.0	57.3	57.6	57.9	58.1	58.4	56.9	5.8%
1977	58.7	59.3	59.6	60.0	60.2	60.5	60.8	61.1	61.3	61.6	62.0	62.3	60.6	6.5%
1978	62.7	63.0	63.4	63.9	64.5	65.0	65.5	65.9	66.5	67.1	67.5	67.9	65.2	7.6%
1979	68.5	69.2	69.9	70.6	71.4	72.2	73.0	73.7	74.4	75.2	76.0	76.9	72.6	11.3%
1980	78.0	79.0	80.1	80.9	81.7	82.5	82.6	83.2	83.9	84.7	85.6	86.4	82.4	13.5%
1981	87.2	88.0	88.6	89.1	89.7	90.5	91.5	92.2	93.1	93.4	93.8	94.1	90.9	10.4%
1982	94.4	94.7	94.7	95.0	95.9	97.0	97.5	97.7	97.7	98.1	98.0	97.7	96.5	6.2%
1983	97.9	98.0	98.1	98.8	99.2	99.4	99.8	100.1	100.4	100.8	101.1	101.4	99.6	3.2%
1984	102.1	102.6	102.9	103.3	103.5	103.7	104.1	104.4	104.7	105.1	105.3	105.5	103.9	4.4%
1985	105.7	106.3	106.8	107.0	107.2	107.5	107.7	107.9	108.1	108.5	109.0	109.5	107.6	3.5%
1986	109.9	109.7	109.1	108.7	109.0	109.4	109.5	109.6	110.0	110.2	110.4	110.8	109.7	1.9%
1987	111.4	111.8	112.2	112.7	113.0	113.5	113.8	114.3	114.7	115.0	115.4	115.6	113.6	3.6%
1988	116.0	116.2	116.5	117.2	117.5	118.0	118.5	119.0	119.5	119.9	120.3	120.7	118.3	4.1%
1989	121.2	121.6	122.2	123.1	123.7	124.1	124.5	124.5	124.8	125.4	125.9	126.3	123.9	4.8%
1990	127.5	128.0	128.6	128.9	129.1	129.9	130.5	131.6	132.5	133.4	133.7	134.2	130.7	5.4%
1991	134.7	134.8	134.8	135.1	135.6	136.0	136.2	136.6	137.0	137.2	137.8	138.2	136.2	4.2%
1992	138.3	138.6	139.1	139.4	139.7	140.1	140.5	140.8	141.1	141.7	142.1	142.3	140.3	3.0%
1993	142.8	143.1	143.3	143.8	144.2	144.3	144.5	144.8	145.0	145.6	146.0	146.3	144.5	3.0%
1994	146.3	146.7	147.1	147.2	147.5	147.9	148.4	149.0	149.3	149.4	149.8	150.1	148.2	2.6%
1995	150.5	150.9	151.2	151.8	152.1	152.4	152.6	152.9	153.1	153.5	153.7	153.9	152.4	2.8%
1996	154.7	155.0	155.5	156.1	156.4	156.7	157.0	157.2	157.7	158.2	158.7	159.1	156.9	2.9%
1997	159.4	159.7	159.8	159.9	159.9	160.2	160.4	160.8	161.2	161.5	161.7	161.8	160.5	2.3%
1998	162.0	162.0	162.0	162.2	162.6	162.8	163.2	163.4	163.5	163.9	164.1	164.4	163.0	1.5%
1999	164.7	164.7	164.8	165.9	166.0	166.0	166.7	167.1	167.8	168.1	168.4	168.8	166.6	2.2%
2000	169.3	170.0	171.0	170.9	171.2	172.2	172.7	172.7	173.6	173.9	174.2	174.6	172.2	3.4%
2001	175.6	176.0	176.1	176.4	177.3	177.7	177.4	177.4	178.1	177.6	177.5	177.4	177.0	2.8%
2002	177.7	178.0	178.5	179.3	179.5	179.6	180.0	180.5	180.8	181.2	181.5	181.8	179.9	1.6%
2003	182.6	183.6	183.9	183.2	182.9	183.1	183.7	184.5	185.1	184.9	185.0	185.5	184.0	2.3%
2004	186.3	186.7	187.1	187.4	188.2	188.9	189.1	189.2	189.8	190.8	191.7	191.7	188.9	2.7%
2005	191.6	192.4	193.1	193.7	193.6	193.7	194.9	196.1	198.8	199.1	198.1	198.1	195.3	3.4%
2006	199.3	199.4	199.7	200.7	201.3	201.8	202.9	203.8	202.8	201.9	202.0	203.1	201.6	3.2%
2007	203.4	204.2	205.3	205.9	206.8	207.2	207.6	207.7	208.5	209.2	210.8	211.4	207.3	2.9%
2008	212.2	212.7	213.4	213.9	215.2	217.5	219.0	218.7	218.9	217.0	213.2	211.4	215.3	3.8%
2009	211.9	212.7	212.5	212.7	213.0	214.8	214.7	215.4	215.9	216.5	217.2	217.3	214.6	-0.3%
2010	217.5	217.3	217.4	217.4	217.3	217.2	217.6	217.9	218.3	219.0	219.6	220.5	218.1	1.6%
2011	221.2	221.9	223.0	224.1	224.8	224.8	225.4	226.1	226.6	226.8	227.2	227.2	224.9	3.1%
2012	227.8	228.3	228.8	229.2	228.7	228.5	228.6	229.9	231.0	231.6	231.2	231.2	229.6	2.1%
2013	231.7	232.9	232.3	231.8	231.9	232.4	232.9	233.5	233.5	233.7	234.1	234.7	233.0	1.5%
2014	235.3	235.5	236.0	236.5	236.9	237.2	237.5	237.5	237.5	237.4	237.0	236.3	236.7	1.6%
2015	234.7	235.2	236.0	236.2	237.0	237.7	238.1	238.0	237.5	237.8	238.0	237.8	237.0	0.1%
2016	237.8	237.5	238.0	238.8	239.5	240.2	240.2	240.6	241.1	241.7	242.0	242.8	240.0	1.3%
2017	243.8	244.0	243.7	244.1	244.0	244.2	244.4	245.3	246.4	246.6	247.3	247.9	245.1	2.1%
2018	248.9	249.4	249.5	250.0	250.6	251.1	251.6	251.9	252.0	252.8	252.8	252.7	251.1	2.4%
2019	252.7	253.1	254.1	255.0	255.2	255.3	256.2	256.3	256.4	257.3	257.9			

Source: U.S. Bureau of Labor Statistics

Table 9.2: Regional Price Parities by State, 2017

State	All items	Goods	Services	
			Rents	Other
Alabama	86.7	96.5	63.1	93.3
Alaska	104.4	101.4	132.1	95.6
Arizona	96.4	96.8	93.0	98.4
Arkansas	86.5	94.9	62.1	93.3
California	114.8	103.5	150.6	107.0
Colorado	103.2	99.6	120.7	97.7
Connecticut	108.0	104.0	113.1	109.0
Delaware	100.1	98.9	97.1	103.3
District of Columbia	116.9	105.6	154.5	109.5
Florida	99.9	98.5	106.7	96.9
Georgia	92.5	96.9	81.6	95.2
Hawaii	118.5	111.3	156.4	103.2
Idaho	93.0	98.5	77.7	96.7
Illinois	98.5	98.3	97.5	99.2
Indiana	89.8	96.2	73.9	92.7
Iowa	89.8	95.0	75.2	90.9
Kansas	90.0	95.7	74.2	92.6
Kentucky	87.9	94.6	67.1	93.1
Louisiana	90.1	96.8	75.2	93.3
Maine	98.4	98.6	92.5	101.6
Maryland	109.4	103.6	121.8	106.8
Massachusetts	107.9	101.8	121.8	106.0
Michigan	93.0	97.4	81.0	95.3
Minnesota	97.5	101.3	96.0	94.1
Mississippi	85.7	94.1	62.8	93.3
Missouri	89.5	95.5	73.0	92.3
Montana	94.6	99.4	83.1	94.7
Nebraska	89.6	95.2	74.7	91.1
Nevada	97.6	95.9	96.8	100.5
New Hampshire	105.8	100.9	116.7	104.8
New Jersey	112.9	102.0	130.0	114.8
New Mexico	93.3	97.0	80.2	99.1
New York	115.8	108.8	131.8	113.1
North Carolina	91.3	96.6	79.7	93.3
North Dakota	90.1	94.8	78.3	90.8
Ohio	88.9	95.8	72.1	91.7
Oklahoma	89.0	95.8	69.9	93.3
Oregon	99.5	99.1	106.4	95.9
Pennsylvania	97.9	99.4	86.4	102.9
Rhode Island	98.6	98.4	94.9	101.5
South Carolina	90.4	96.9	77.2	93.3
South Dakota	88.2	94.7	70.2	90.7
Tennessee	90.4	96.4	76.3	93.3
Texas	97.0	97.1	94.5	98.5
Utah	**97.0**	**96.6**	**93.9**	**99.6**
Vermont	102.5	98.5	116.4	101.4
Virginia	102.1	99.8	108.9	100.5
Washington	106.4	104.4	119.5	101.6
West Virginia	87.0	94.6	61.4	94.9
Wisconsin	92.4	95.8	84.2	92.9
Wyoming	95.2	99.2	85.7	95.3

Source: U.S. Bureau of Economic Analysis

Social Indicators

10

Shawn Teigen, Utah Foundation
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2019 OVERVIEW

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

Quality of Life

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

In addition to measuring community well-being, Utah Foundation developed a Personal Quality of Life Index in 2018. Being "secure financially" is the lowest scoring measure among the personal quality of life questions. Comparatively, Utahns score high on happiness and finding meaning in life. Higher incomes and religious affiliation are tightly linked to better personal quality of life scores. Youth also has a strong, but lesser effect.

Social Capital

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

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

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

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

Civic Engagement: Voter Turnout

The highest midterm election turnout seen in decades was during the 2018 election. In Utah, the percent increase in voter turnout compared to the 2014 election was higher than both the Mountain State average and the national average, as well as any single Mountain State. The overall number of voters in Utah was lower than three other Mountain States in both 2018 and 2016, and behind six Mountain States in 2014.

1 Organisation for Economic Co-operation and Development, *Four Interpretations of Social Capital: An Agenda for Measurement*, June 2013, p. 9.
2 Ibid., p. 32
3 The Joint Economic Committee's Social Capital Index, the Bowling Alone Social Capital Index and the Penn State Index.

Social Trust: Violent Crimes per 100,000

While Utah's levels of property crime, including larceny and motor vehicle theft, are above the national average, Utah Foundation uses violent crime (murder and non-negligent manslaughter, forcible rape, robbery, and aggravated assault) in its Social Capital Index. In 2018, there were approximately 233 incidents of violent crime in Utah per 100,000 people. That said, Utah's rate of violent crime is comparatively low; the Mountain State average is 423 per 100,000 people, while the national rate is 381.

Participation in Communal Life: Volunteering

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

Family Health: Share of Children Living in Single-Parent Families

Having one parent not only affects the overall economic well-being of a household, but it also reduces the number of potential social capital connections of that child. Utah fares well on this metric, with only 21% of children living in single-parent families. The percent in other Mountain States ranges from 25% in Idaho to 45% in New Mexico. The national average is 34%.

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

The strength of extended families is important to social capital, as is the length of friendships and having a diversity of colleagues. As such, living in one place, or at least one state, can have positive impacts on social cohesion. There are clear differences among the Mountain States on this metric. Utah tops the list, with 60% of residents native to Utah. The percent in other Mountain States ranges from 53% (Montana and New Mexico) to 25% (Nevada).

A higher proportion of Utah's population is also born in the state compared to the national average: 60% vs. 58%. But while the national average has held steady since 2005, the percent of Utah's population born in the state fell from 63% during this period. The state's strong economy has led to an increase in net migration levels.

Focus on Future Generations: Investment in Public Schools

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

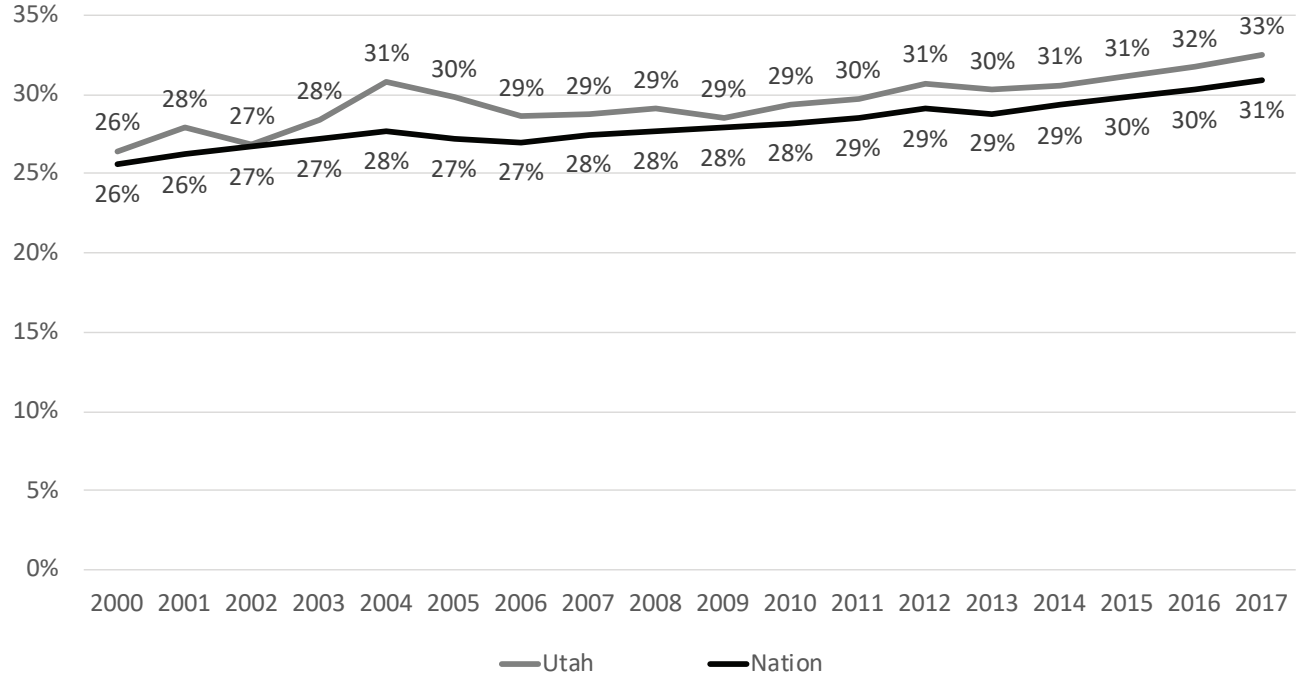
The Mountain State average is led by Wyoming, which spends $48 per $1,000 of personal income. Arizona is at the bottom, at $27 per $1,000.

Social Mobility: Share of Population that are College Graduates

Post-secondary education is one of the strongest predictors of social mobility, in part due to the social capital gained through that education. Colorado leads the Mountain States with the highest share of college graduates in the population older than 25 years (39%), followed by Utah (33%). Nevada has the lowest share of college graduates, with less than one-quarter of its residents holding bachelor's degrees or higher.

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

Figure 10.1: Share of Population Age 25 Years or Older with Bachelor's Degrees or Higher, 2002-2017



Source: American Community Survey (2017). 5-year data sample. (5-year data not yet available for 2018. Montana and Wyoming not available in 1-year data sample.)

Table 10.1: Social Capital Indicators

	Voter Turnout 2014 (Midterm) (Percent)	**Voter Turnout 2016** (Percent)	**Voter Turnout 2018 (Midterm)** (Percent)	**Violent Crime Rate 2018** (Rate per 100,000)	**Volunteerism 2017** (Percent)	**Children in Single-Parent Families 2018** (Percent)	**Population Born in the State of Current Residence 2017** (Percent)	**Public School Education Spending per $1,000 of Personal Income 2017** (Dollars)	**Residents Age 25+ with Bachelor's Degrees or higher 2017** (Percent)
Utah	36.5	62.7	57.6	233.1	45.1	20.6	60.1	32.90	32.5
Arizona	40.6	60.4	58.9	474.9	25.5	36.5	38.2	26.80	28.4
Colorado	59.3	69.5	58.1	397.2	30.2	29.4	41.4	30.00	39.4
Idaho	41.8	62.1	47.9	227.1	35.1	24.5	46.0	30.70	26.8
Montana	50.1	65.9	63.8	374.1	33.5	28.2	53.4	36.40	30.7
Nevada	37.3	60.5	48.7	541.7	21.2	36.1	25.0	31.60	23.7
New Mexico	45.6	54.8	48.1	856.6	25.0	45.2	53.2	38.90	26.9
Wyoming	40.3	64.8	52.1	212.2	30.7	28.4	42.0	47.90	26.7
Mtn. State avg.	43.9	62.6	54.4	423.2	30.8	31.1	44.9	34.40	29.4
National avg.	41.9	61.4	53.4	380.6	n/a	34.3	57.7	37.50	30.9

Sources: U.S. Census Bureau, "Voting and Registration Tables." Available from https://www.census.gov/topics/public-sector/voting/data/tables.html.
FBI (2018). Available from https://ucr.fbi.gov/crime-in-the-u.s/2018/crime-in-the-u.s.-2018/topic-pages/tables/table-4.
National & Community Service. Average of 2014, 2015 and 2017. Available from https://data.nationalservice.gov/.
American Community Survey (2018). 1-year data sample. Table C23008: Age of Own Children under 18 Years in Families and Subfamilies by Living Arrangements by Employment Status of Parents.
American Community Survey (2017). 5-year data sample. Table GCT0601: Percent of the Native Population Born in their State of Residence (Including Puerto Rico) and Table S0501: Selected Characteristics of the Native and Foreign-Born Populations, Utah Foundation calculations. (5-year data not yet available for 2018.)
U.S. Census Bureau Annual Survey of School System Finances (2017).
American Community Survey (2017). 5-year data sample. (5-year data not yet available for 2018. Montana and Wyoming not available in 1-year data sample.)

Economic Development

11

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

2019 OVERVIEW

Job Growth

Utah's economy continued to grow in 2019. While national gains were modest, Utah remained among the fastest-growing states. The state posted year-over-year job growth at 3.0%, near double the national increase of 1.6%. This corresponds to more than 45,600 jobs added to Utah's economy.

In 2019 the Economic Development Corporation of Utah and the Utah Governor's Office of Economic Development worked together to support 42 companies to relocate or expand in Utah, adding over 9,500 jobs to the state's economy and retaining over 3,500 additional jobs.[1] These companies made capital investments in Utah totaling more than $500 million.[2]

Major Projects

Notable expansions or relocations in 2019 include the expansion of Qualtrics, adding over 2,200 jobs in Utah County; Tyson Foods, adding over 1,300 jobs in Utah County; Oatly, adding 50 jobs and $40 million in capital investment in Weber County; and Brex, adding 1,000 jobs in Salt Lake County.[3]

In addition to business growth, infrastructure projects continue to enhance opportunities in Utah. The state's transportation infrastructure is one of the best in the country. Salt Lake City continues the 10-year, $3.6 billion remodel of its international airport. Construction is well underway on the 900,000-square-foot main terminal, 1.7 million-square-foot parking deck, 827,000-square-foot south concourse, and 477,000-square-foot second concourse. The first phase is scheduled to open on September 15, 2020.[4]

Business Climate

Utah's young, educated workforce continues to grow, state and local governments remain fiscally responsible and stable, and the cost of doing business remains lower than the national average. Utah continues to receive recognition as a leading global business destination, enjoying accolades from national sources like *Forbes*, which has ranked Utah the #1 Best State for Business in six of the past nine years and second in 2018.[5] In November, *Forbes* also named Utah the Best State for Entrepreneurs in 2020.[6]

Utah also ranked fourth on CNBC's "America's Top States for Business 2019." Factors that contribute to this ranking include the economy, high quality of life, business friendliness, and quality infrastructure.[7]

Trends

Utah's strategic industry clusters employed over 258,000 Utahns in 2019, up from 247,000 in 2018, demonstrating 4.2% growth.[8] Utah's industry clusters include aerospace and defense, energy and natural resources, financial services, life sciences, outdoor products, and software development and information technology.

Utah-based companies raised $998 million in venture capital in 2018. Strong investment activity continued in 2019, with companies raising over $1.2 billion as of November 19th. Utah also saw nearly $9.3 billion worth of mergers and acquisitions by November 19, 2019.[9]

1 Project Report. The Economic Development Corporation of Utah. Internal data. 11 Nov. 2019.
2 ibid.
3 "Newsroom." Utah Governor's Office of Economic Development. business.utah.gov/news/. 19 Nov. 2019.
4 Davidson, L. (September 24, 2019). "New $3.6B Salt Lake City airport opens in 1 year." The Salt Lake Tribune. www.sltrib.com/news/politics/2019/09/23/new-b-salt-lake-city/. 19 Nov. 2019.
5 "Best States for Business." Forbes Magazine. www.forbes.com/sites/kurtbadenhausen/2018/11/28/the-best-states-for-business-2018-north-carolina-leads-the-way/#33c0258b3c30. 19 Nov. 2019.
6 DePietro, A. (November 13, 2019). "The Best and Worst States for Entrepreneurs in 2020." Forbes Magazine. www.forbes.com/sites/andrewdepietro/2019/11/13/best-worst-states-entrepreneurs-2020/#669dd5a146a6. 21 Nov. 2019
7 "These are America's Top States for Business in 2019." CNBC. www.cnbc.com/2019/07/10/these-are-americas-top-states-for-business-in-2019.html. 19 Nov. 2019.
8 The Economic Development Corporation of Utah. Internal data. 5 Dec. 2018.
9 PitchBook. 19 Nov. 2019.

Updated Statewide Economic Development Strategic Plan

In response to the Utah Legislature's request outlined in S.B. 172, the Utah Governor's Office of Economic Development convened working groups of Utah leaders and stakeholders to update the state's economic development strategic plan. The Legislature requested a detailed account of Utah's economic development vision and policy priorities.

This landmark effort produced a comprehensive and strategic economic development plan for the state that will guide its future economic development efforts.

During the summer of 2019, GOED managed an Economic Development Strategic Plan Committee of nearly 25 individuals, who worked with large groups of public- and private-sector leaders to identify and evaluate Utah's economic challenges and opportunities. The committee managed input generated from surveys of more than 430 Utah industry leaders. Seventeen subcommittees received input and recommendations, which helped shape the ideas, strategies and recommendations incorporated into the final report, delivered to the Legislature on Oct. 15, 2019.

The plan summarized fundamental principles the committee agreed should guide the ongoing economic development efforts for "Team Utah," and policies that serve as its pillars. The four policy pillars included Strategic Industry Advancement, Innovation and Entrepreneurship, Talent Development, and Uniquely Utah. The plan also identified cornerstone initiatives reflecting legislatively mandated priorities.

The document reflects the combined wisdom of Utahns who know the most about the state's economic development efforts, and provides a focus for the future of economic development in the state.

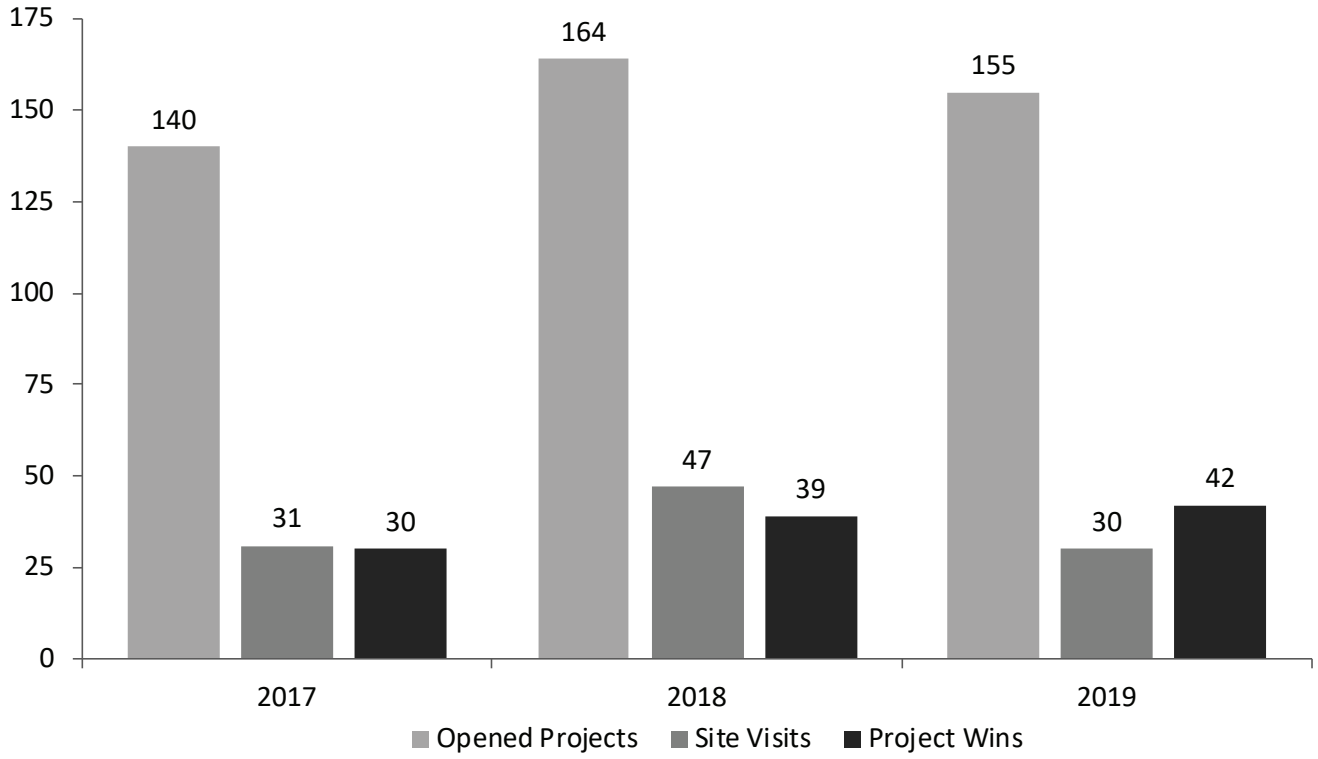
2020 OUTLOOK

Because of Utah's diverse mix of industries, the state economy is expected to mirror trends in the national economy, but at a greater rate.[10]

High net migration rates for the state of Utah are expected to continue, both for international and domestic migration. Utah continues to attract relocation projects, as well as the attention of national and global site selectors, and is primed for the best organizations and talent to bring their business to the state.

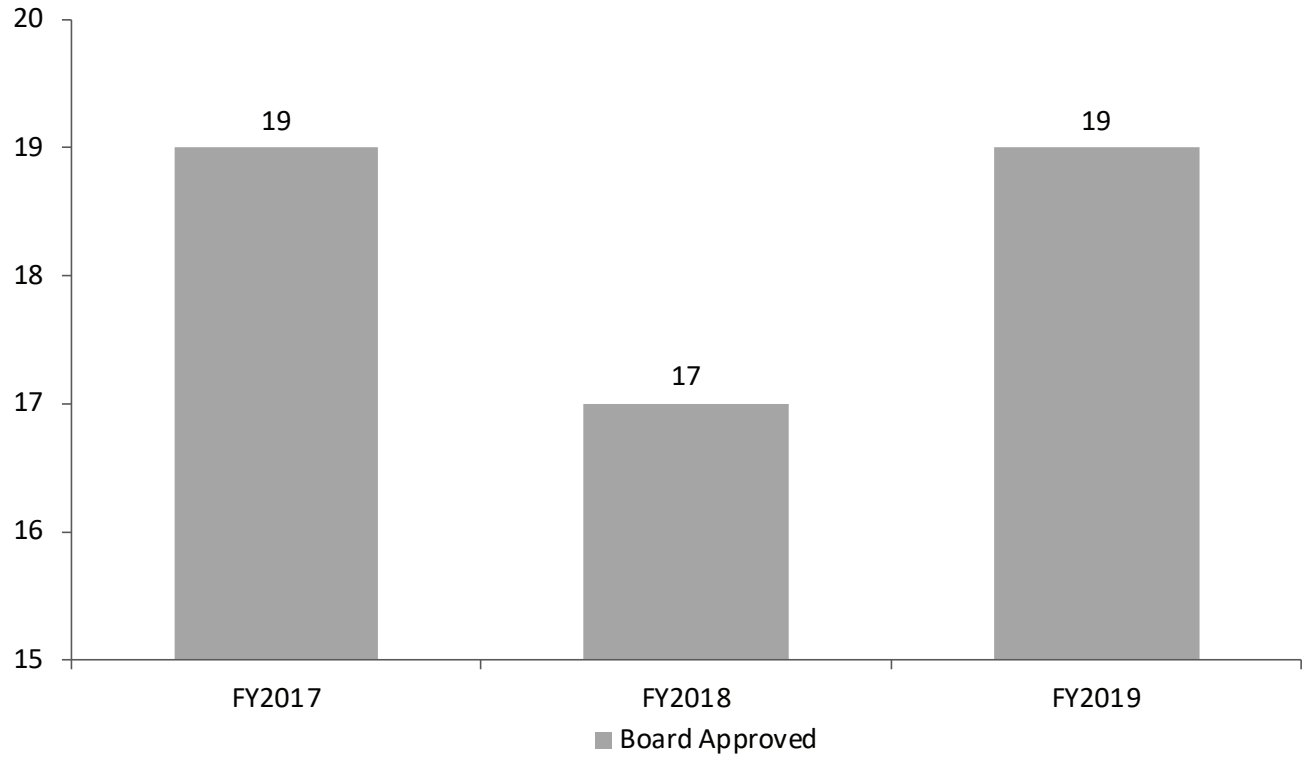
10 "Utah's Economy among the Most Diverse in the Nation," Kem C. Gardner Policy Institute. Utah Informed: Visual Intellection for 2018. Jan. 2018.

Figure 11.1: Economic Development Project Summary



Source: Economic Development Corporation of Utah

Figure 11.2: EDTIF Project Summary



Source: Utah Governor's Office of Economic Development

Public Education

12

Deborah Jacobson, Utah State Board of Education
Dale Frost, Utah State Board of Education
Kirin McInnis, Utah State Board of Education

2019 OVERVIEW

Enrollment

In fall 2019, there were 667,403 students in Utah's public education system, an increase of 7,965 students (1.2%) over 2018. There were 48,813 kindergarten students, a decrease of 303 students, or 0.6%, over fall 2018 (49,116).

Although Utah's student population is primarily white (73.7%), it is becoming more diverse. In fall 2019, 17.6% of Utah's student body was Hispanic or Latino, 1.7% was Asian, 1.6% was Pacific Islander, 1.0% was American Indian or Alaska Native, 1.4% was African American or Black, and the remaining students (3.0%) identified with multiple ethnicities.

In 2019, there were 112 operating charter schools in Utah. Charter schools operate independently of school districts but receive public funds and must adhere to federal and state laws in using those funds for operations. Charter schools are educating 77,630 students, about 8.4% of all Utah students in public schools.

Finances

In fiscal year 2016, the most recent year for which National Center for Education Statistics data are available for all states, Utah's net current expenditure per pupil was $7,006 (the nation's lowest). Net current expenditures do not include capital spending. Including capital spending raises total expenditure per pupil for fiscal year 2016 to $8,345. However, some consider current expenditure as a percent of total personal income as a better measure of Utah's effort to fund public education. Using this measure, Utah ranks 35th nationally, at 3.5%. Utah's per pupil net current expenditure for fiscal year 2019 was $8,156.

In the 2019 General Session, the Legislature appropriated funds for a $137 increase (4.0%) in the regular Weighted Pupil Unit (WPU) value, increasing it from $3,395 to $3,532 for fiscal year 2020. The cost of the Basic School Program is estimated to be $3,103,563,000. Of these funds $509,484,600 come from local property tax revenues and $2,561,578,400 come from state income tax revenues.

Achievement

In 2019, Utah ranked 30th in the nation with an ACT Average Composite Score of 20.3. Utah is one of only 15 states in the nation where the test is offered to 100% of high school students.

Statewide, the class of 2019 graduation rate was 87.0%, the same as the previous year's rate.

In 2019, Utah's pupil-teacher ratio was 21.7, which is the same as the previous year's ratio.

A total of 38,907 Utah high school students earned 285,710 hours of college credit in 2019 through Utah's concurrent enrollment program. This total represents a 7.1% increase in students over 2018. Ninety-five percent of the credits attempted are passed.

A total of 28,325 Utah public school students took 42,967 Advanced Placement (AP) exams in 2019 with a 67.4% pass rate, meaning the scores were good enough to earn college credit. Nationally, the pass rate at public schools is 57.9%.

Utah has 14 schools involved in the International Baccalaureate (IB) program, including nine that offer IB diplomas.

Two hundred and seven Utah schools—or about 18.0% of all Utah schools—offer dual immersion programs in French (21), German (2), Mandarin Chinese (47), Russian (1), Portuguese (12), and Spanish (101). Twenty-three additional schools offer more than one language.

2020–2021 OUTLOOK

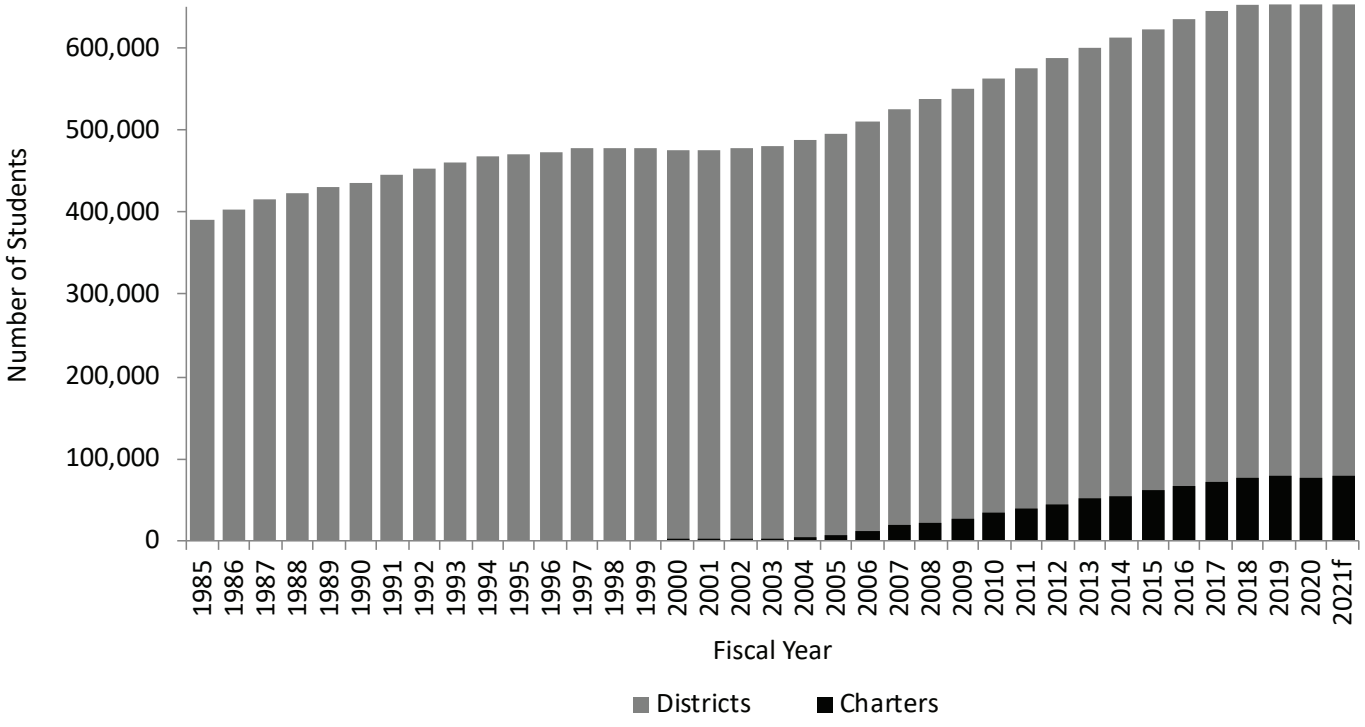
Enrollment

Growth in student enrollment is expected to continue for several years, as Utah experiences net in-migration, and has among the nation's highest birth rate and fertility rate. Total enrollment in Utah's public education system in fall 2020 is forecasted to increase by 7,902 students (1.2%) to 675,305. A projected additional $56 million in state funds are needed to fund student growth.

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

Utah's charter school enrollment has increased by approximately 3.6% per year, on average, over the last four years. It is forecasted that enrollment in charter schools in Utah will grow by 3.2% in the fall of 2020.

Figure 12.1: Utah Public Education Enrollment, FY 1985 – FY 2021



Note: f = forecast

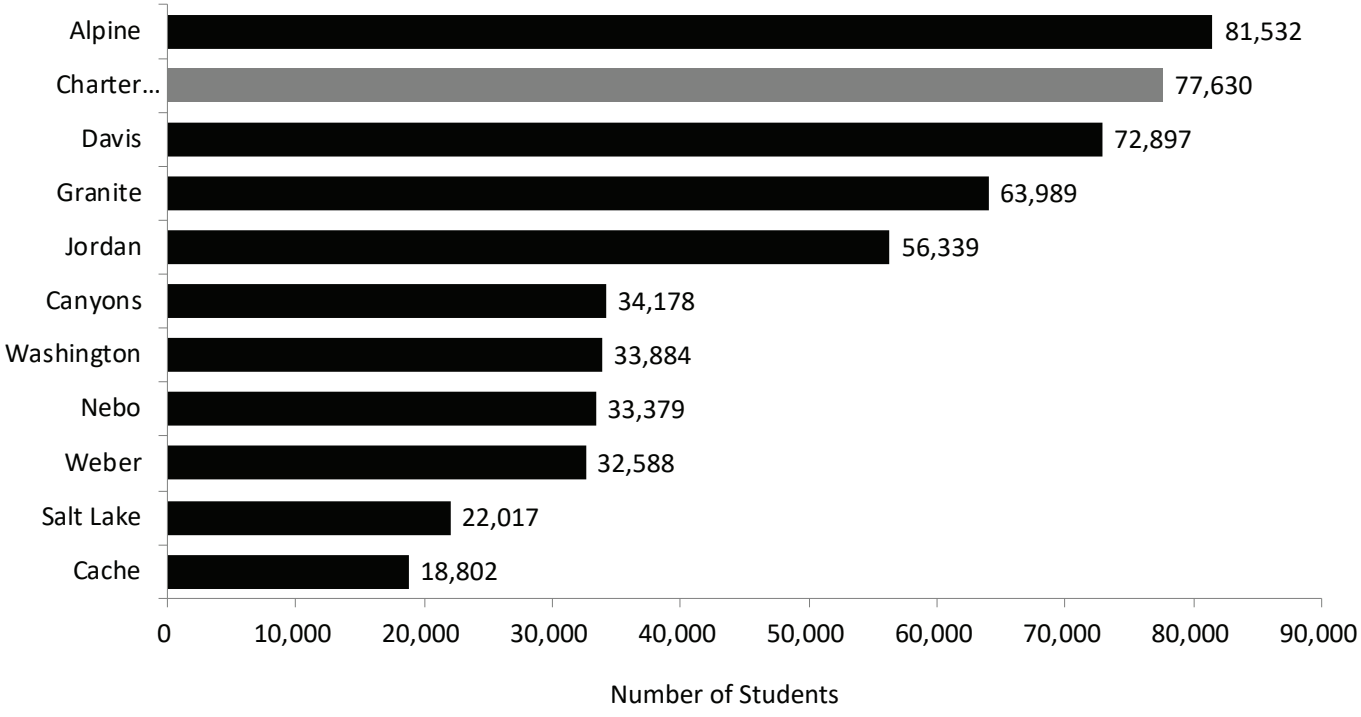
Source: Utah State Board of Education, School Finance & Data and Statistics

Figure 12.2: Percent Change in Public Education Enrollment FY 1985 – FY 2021

Note: f = forecast

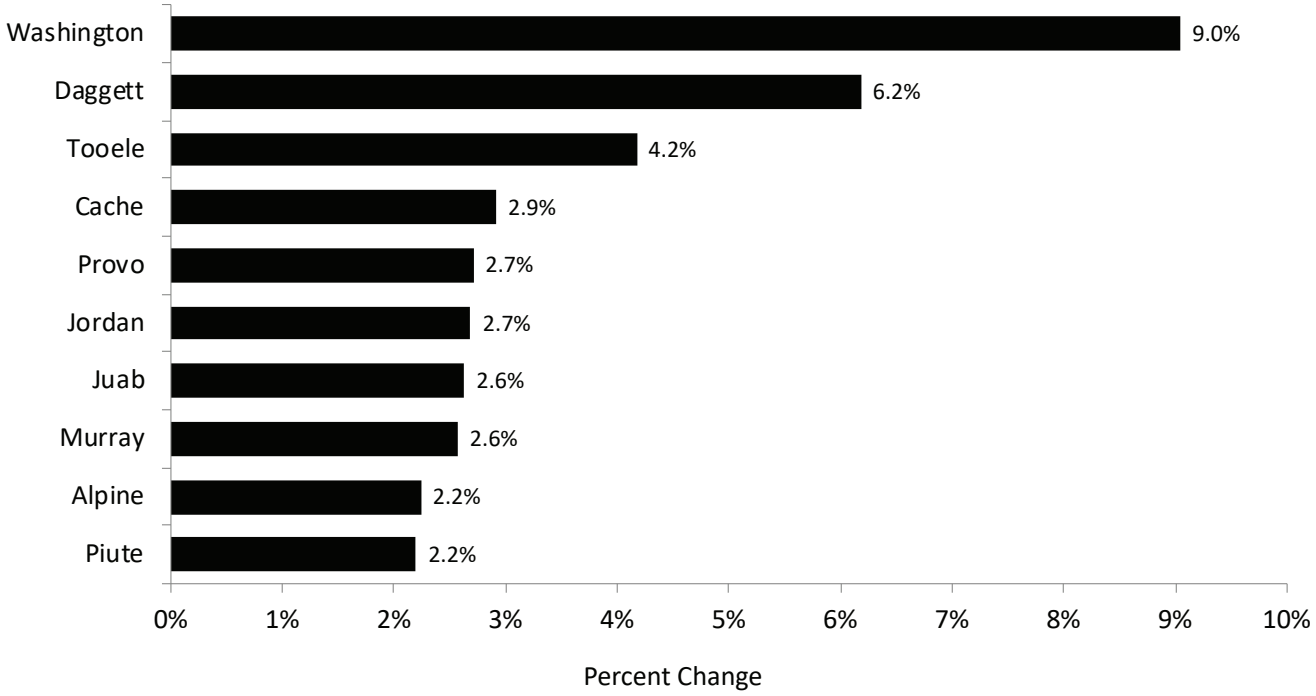
Source: Utah State Board of Education, School Finance & Data and Statistics

Figure 12.3: Largest Enrollment by District, FY 2020



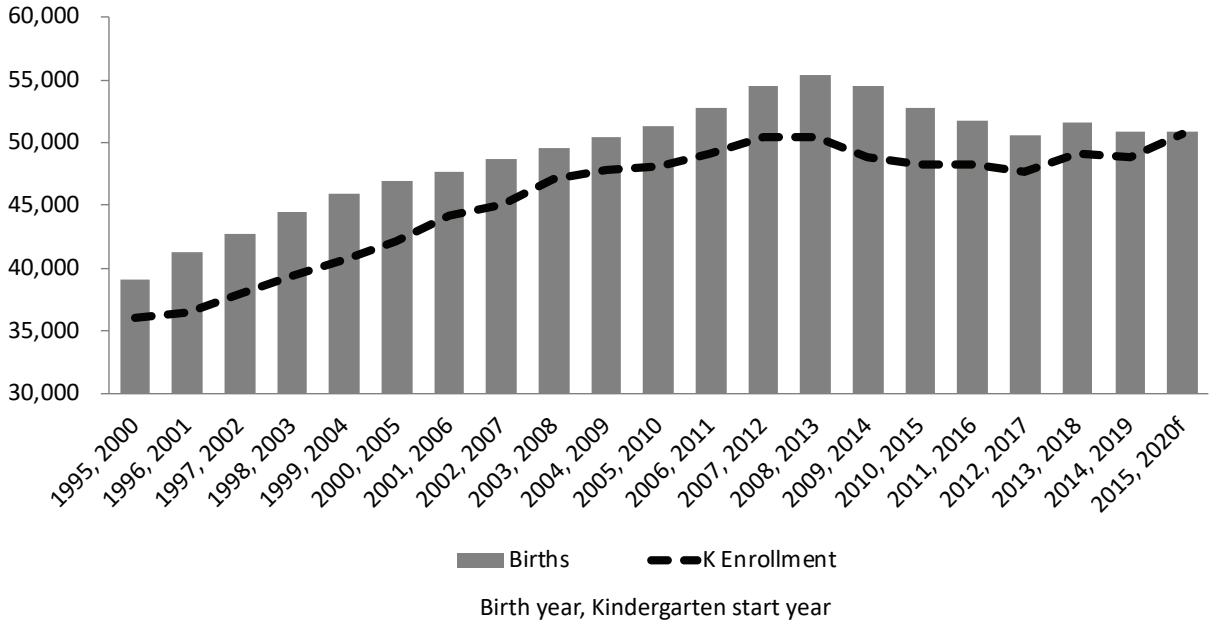
Source: Utah State Board of Education, School Finance & Data and Statistics

Figure 12.4: Largest Enrollment Growth by District, FY 2019 to FY 2020



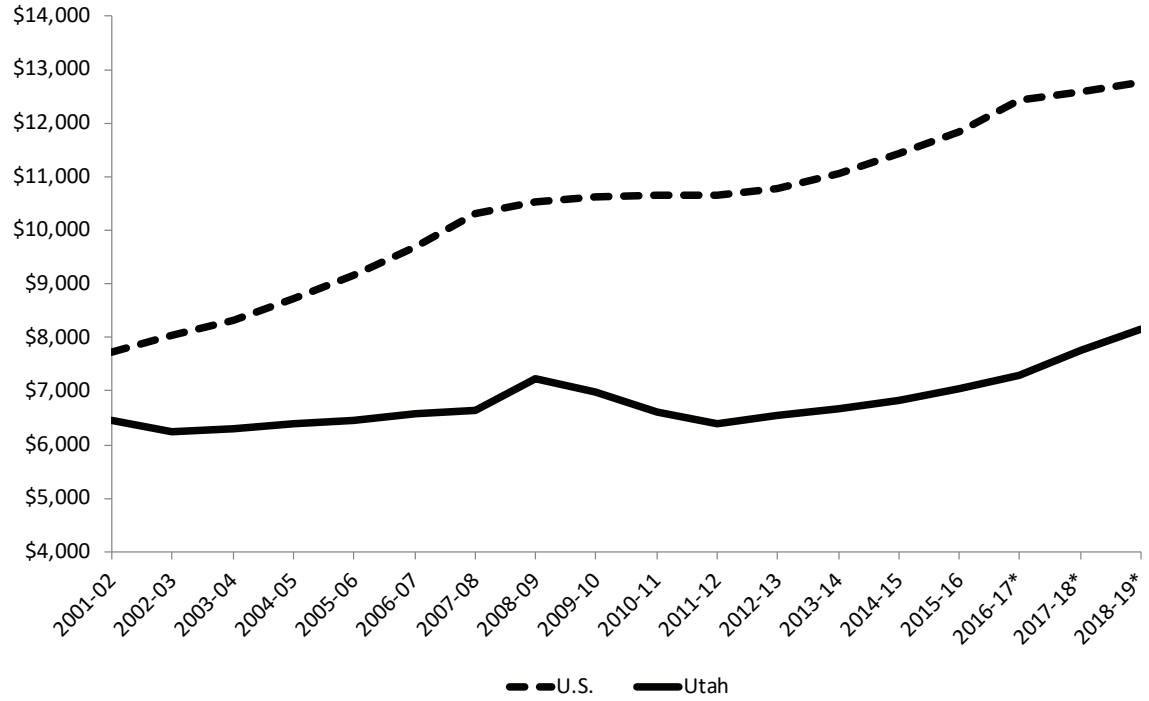
Source: Utah State Board of Education, School Finance & Data and Statistics

Figure 12.5: Kindergarten Enrollment & Five Years Prior Births, 2000-2020



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

Figure 12.6: U.S. and Utah Current Expenditures per Pupil in Enrollment, FY 2002 – FY 2019



Note: U.S. expenditures are in constant 2018-19 dollars based on the Consumer Price Index adjusted to a school-year basis.
*** For Fiscal Years 2017-2019*, U.S. data is projected at time of publication.**

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

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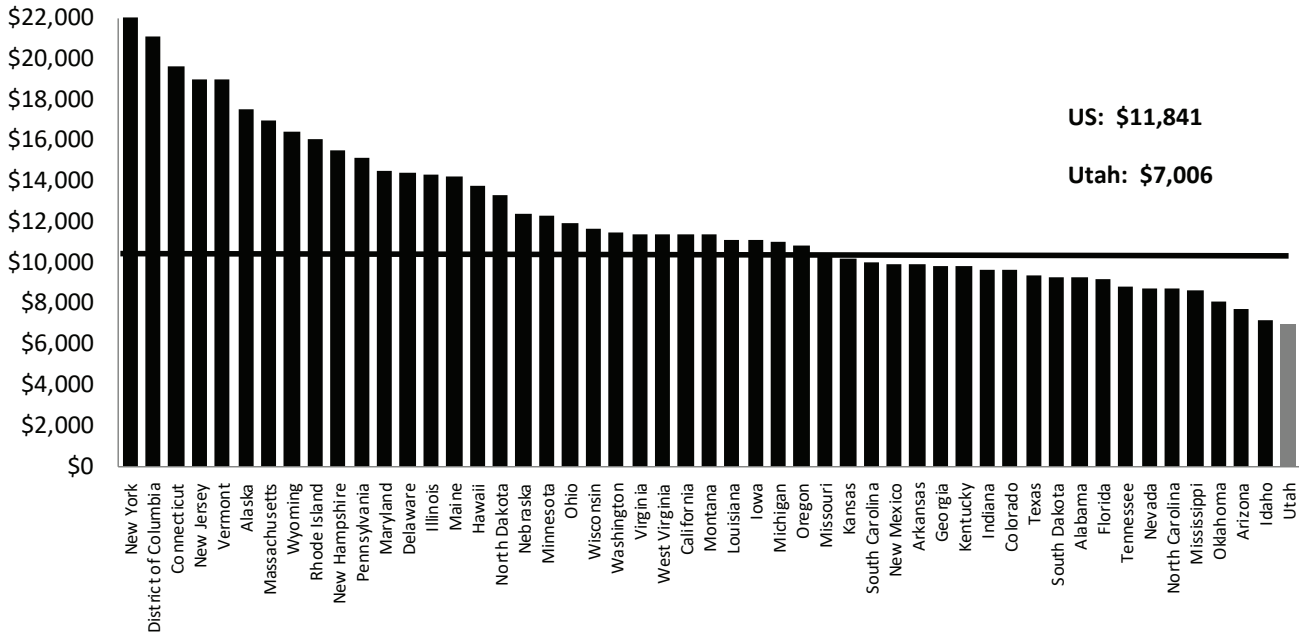
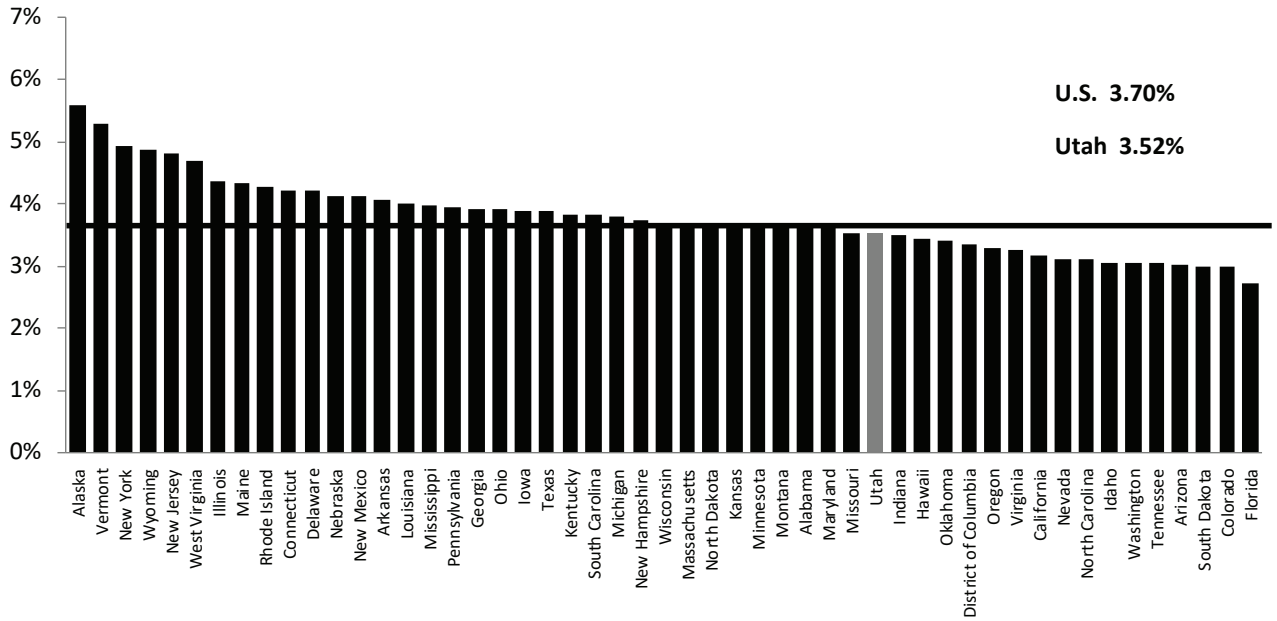
Figure 12.7: Current Expenditures per Pupil, by State, FY 2016



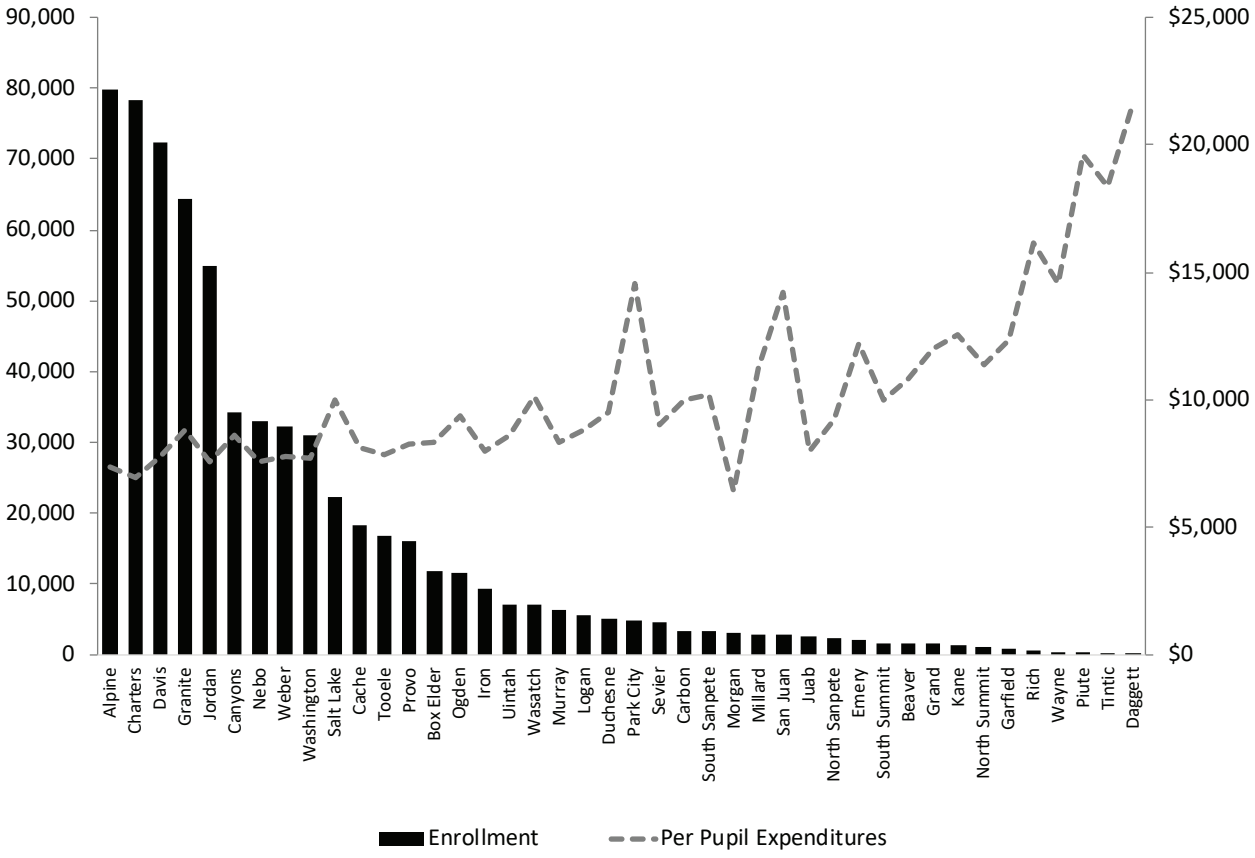
Source: USBE, School Finance, and U.S. Department of Education, National Center for Education Statistics

Figure 12.8: Current Expenditures as a Percentage of Personal Income, by State, FY 2016



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

Figure 12.9: Utah Total Enrollment & Current Expenditures per Pupil, FY 2019



Source: USBE, School Finance

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

Year	October 1 Enrollment	Annual Change	Percent Change	July 1 State Pop	Annual Change	Percent Change	Enrollment/ Population
1980	342,885	10,310	3.1%	1,474,000	58,050	4.1%	23.3%
1981	354,540	11,655	3.4%	1,515,000	41,000	2.8%	23.4%
1982	369,338	14,798	4.2%	1,558,000	43,000	2.8%	23.7%
1983	378,208	8,870	2.4%	1,595,000	37,000	2.4%	23.7%
1984	390,141	11,933	3.2%	1,622,000	27,000	1.7%	24.1%
1985	403,305	13,164	3.4%	1,643,000	21,000	1.3%	24.5%
1986	415,994	12,689	3.1%	1,663,000	20,000	1.2%	25.0%
1987	423,386	7,392	1.8%	1,678,000	15,000	0.9%	25.2%
1988	429,551	6,165	1.5%	1,690,000	12,000	0.7%	25.4%
1989	435,762	6,211	1.4%	1,706,000	16,000	0.9%	25.5%
1990	444,732	8,970	2.1%	1,729,227	23,227	1.4%	25.7%
1991	454,218	9,486	2.1%	1,780,870	51,643	3.0%	25.5%
1992	461,259	7,041	1.6%	1,838,149	57,279	3.2%	25.1%
1993	468,675	7,416	1.6%	1,889,393	51,244	2.8%	24.8%
1994	471,402	2,727	0.6%	1,946,721	57,328	3.0%	24.2%
1995	473,666	2,264	0.5%	1,995,228	48,507	2.5%	23.7%
1996	478,028	4,362	0.9%	2,042,893	47,665	2.4%	23.4%
1997	479,151	1,123	0.2%	2,099,409	56,516	2.8%	22.8%
1998	477,061	-2,090	-0.4%	2,141,632	42,223	2.0%	22.3%
1999	475,974	-1,087	-0.2%	2,193,014	51,382	2.4%	21.7%
2000	475,269	-705	-0.1%	2,246,468	53,454	2.4%	21.2%
2001	477,801	2,532	0.5%	2,290,634	44,166	2.0%	20.9%
2002	481,143	3,342	0.7%	2,331,826	41,192	1.8%	20.6%
2003	486,938	5,795	1.2%	2,372,458	40,632	1.7%	20.5%
2004	495,682	8,744	1.8%	2,430,223	57,765	2.4%	20.4%
2005	510,012	14,330	2.9%	2,505,843	75,620	3.1%	20.4%
2006	525,660	15,648	3.1%	2,576,229	70,386	2.8%	20.4%
2007	537,653	11,993	2.3%	2,636,075	59,846	2.3%	20.4%
2008	551,013	13,360	2.5%	2,691,122	55,047	2.1%	20.5%
2009	563,273	12,260	2.2%	2,731,560	40,438	1.5%	20.6%
2010	576,335	13,062	2.3%	2,772,371	40,811	1.5%	20.8%
2011	587,745	11,410	2.0%	2,820,613	48,242	1.7%	20.8%
2012	600,985	13,240	2.3%	2,864,744	44,131	1.6%	21.0%
2013	612,551	11,566	1.9%	2,902,179	37,435	1.3%	21.1%
2014	622,182	9,631	1.6%	2,941,964	39,785	1.4%	21.1%
2015	633,896	11,714	1.9%	2,997,584	55,620	1.9%	21.1%
2016	644,476	10,580	1.7%	3,054,994	57,410	1.9%	21.1%
2017	652,347	7,871	1.2%	3,113,983	58,989	1.9%	20.9%
2018	659,438	7,091	1.1%	3,166,666	52,683	1.7%	20.8%
2019	667,403	7,965	1.2%	3,220,262	53,596	1.7%	20.7%
2020f	675,305	7,902	1.2%	3,270,729	50,467	1.6%	20.6%

Note: f = forecast
Source: Utah State Board of Education (enrollment counts). Interagency Common Data Committee (2020 enrollment forecast). State Population and 2020 Forecast: Pam Perlich, Ph.D., Demography Utah Population Committee (DUPC) estimates for 2010-2019 and Kem C. Gardner Policy Institute, University of Utah for 2020 forecast.

Table 12.2: Fall Enrollment by District

						Total Annual Change				Percent Change				FY 2020 Rank		
	FY 2017 10/1/16	FY 2018 10/1/17	FY 2019 10/1/18	FY 2020 10/1/19	FY 2021f 10/1/20f	FY17-18	FY18-19	FY19-20	FY20-21f	FY17-18	FY18-19	FY19-20	FY20-21f	Size	Total Annual Change	Percent Change
Alpine	77,343	78,853	79,748	81,532	82,625	1,510	895	1,784	1,093	2.0%	1.1%	2.2%	1.3%	1	2	9
Beaver	1,519	1,540	1,527	1,524	1,502	21	-13	-3	-22	1.4%	-0.8%	-0.2%	-1.4%	33	27	27
Box Elder	11,572	11,671	11,770	11,914	12,023	99	99	144	109	0.9%	0.8%	1.2%	0.9%	14	12	16
Cache	17,536	17,895	18,270	18,802	19,259	359	375	532	457	2.0%	2.1%	2.9%	2.4%	11	6	4
Canyons	34,017	33,907	34,134	34,178	34,123	-110	227	44	-55	-0.3%	0.7%	0.1%	-0.2%	6	16	25
Carbon	3,348	3,364	3,484	3,472	3,411	16	120	-12	-61	0.5%	3.6%	-0.3%	-1.8%	24	30	28
Daggett	183	163	178	189	203	-20	15	11	14	-10.9%	9.2%	6.2%	7.4%	42	21	2
Davis	71,021	71,908	72,263	72,897	73,025	887	355	634	128	1.2%	0.5%	0.9%	0.2%	3	5	17
Duchesne	5,009	5,103	5,142	5,164	5,181	94	39	22	17	1.9%	0.8%	0.4%	0.3%	21	18	22
Emery	2,174	2,184	2,181	2,141	2,116	10	-3	-40	-25	0.5%	-0.1%	-1.8%	-1.2%	31	36	39
Garfield	904	909	899	899	883	5	-10	0	-16	0.6%	-1.1%	0.0%	-1.8%	37	26	26
Grand	1,483	1,451	1,520	1,498	1,446	-32	69	-22	-52	-2.2%	4.8%	-1.4%	-3.5%	34	32	35
Granite	67,177	66,024	64,281	63,989	63,804	-1,153	-1,743	-292	-185	-1.7%	-2.6%	-0.5%	-0.3%	4	40	29
Iron	9,074	9,169	9,395	9,544	9,745	95	226	149	201	1.0%	2.5%	1.6%	2.1%	16	11	12
Jordan	52,507	53,519	54,865	56,339	56,339	1,012	1,346	1,474	0	1.9%	2.5%	2.7%	0.0%	5	3	6
Juab	2,513	2,510	2,587	2,655	2,700	-3	77	68	45	-0.1%	3.1%	2.6%	1.7%	29	14	7
Kane	1,256	1,250	1,269	1,275	1,286	-6	19	6	11	-0.5%	1.5%	0.5%	0.9%	35	24	21
Logan	5,719	5,555	5,569	5,420	5,556	-164	14	-149	136	-2.9%	0.3%	-2.7%	2.5%	20	39	40
Millard	2,840	2,884	2,916	2,973	3,012	44	32	57	39	1.5%	1.1%	2.0%	1.3%	27	15	11
Morgan	2,994	3,069	3,178	3,194	3,219	75	109	16	25	2.5%	3.6%	0.5%	0.8%	26	19	20
Murray	6,494	6,416	6,264	6,425	6,415	-78	-152	161	-10	-1.2%	-2.4%	2.6%	-0.2%	19	10	8
Nebo	32,437	32,809	33,117	33,379	33,762	372	308	262	383	1.1%	0.9%	0.8%	1.1%	8	9	18
North Sanpete	2,360	2,438	2,471	2,507	2,515	78	33	36	8	3.3%	1.4%	1.5%	0.3%	30	17	14
North Summit	1,042	1,048	1,044	1,014	993	6	-4	-30	-21	0.6%	-0.4%	-2.9%	-2.1%	36	34	41
Ogden	12,192	11,736	11,553	11,460	11,288	-456	-183	-93	-172	-3.7%	-1.6%	-0.8%	-1.5%	15	38	31
Park City	4,891	4,816	4,780	4,757	4,649	-75	-36	-23	-108	-1.5%	-0.7%	-0.5%	-2.3%	22	33	30
Piute	280	274	273	279	277	-6	-1	6	-2	-2.1%	-0.4%	2.2%	-0.7%	40	24	10
Provo	17,840	15,991	16,165	16,603	16,878	-1,849	174	438	275	-10.4%	1.1%	2.7%	1.7%	13	7	5
Rich	497	494	507	498	496	-3	13	-9	-2	-0.6%	2.6%	-1.8%	-0.4%	38	29	37
Salt Lake	23,047	22,845	22,401	22,017	21,953	-202	-444	-384	-64	-0.9%	-1.9%	-1.7%	-0.3%	10	41	36
San Juan	2,940	2,889	2,876	2,891	2,872	-51	-13	15	-19	-1.7%	-0.4%	0.5%	-0.7%	28	20	19
Sevier	4,513	4,560	4,538	4,548	4,623	47	-22	10	75	1.0%	-0.5%	0.2%	1.6%	23	22	24
South Sanpete	3,221	3,263	3,268	3,230	3,236	42	5	-38	6	1.3%	0.2%	-1.2%	0.2%	25	35	34
South Summit	1,574	1,650	1,694	1,701	1,666	76	44	7	-35	4.8%	2.7%	0.4%	-2.1%	32	23	23
Tintic	244	239	226	214	217	-5	-13	-12	3	-2.0%	-5.4%	-5.3%	1.4%	41	30	42
Tooele	14,332	16,154	16,903	17,608	18,655	1,822	749	705	1,047	12.7%	4.6%	4.2%	5.9%	12	4	3
Uintah	7,034	6,986	7,069	6,989	6,973	-48	83	-80	-16	-0.7%	1.2%	-1.1%	-0.2%	18	37	33
Wasatch	6,605	6,826	7,040	7,146	7,194	221	214	106	48	3.3%	3.1%	1.5%	0.7%	17	13	13
Washington	29,355	30,015	31,074	33,884	36,640	660	1,059	2,810	2,756	2.2%	3.5%	9.0%	8.1%	7	1	1
Wayne	450	447	444	436	432	-3	-3	-8	-4	-0.7%	-0.7%	-1.8%	-0.9%	39	28	38
Weber	31,445	31,957	32,171	32,588	31,968	512	214	417	-620	1.6%	0.7%	1.3%	-1.9%	9	8	15
Charter Schools	71,494	75,566	78,384	77,630	80,145	4,072	2,818	-754	2,515	5.7%	3.7%	-1.0%	3.2%	2	42	32
State of Utah	**644,476**	**652,347**	**659,438**	**667,403**	**675,305**	**7,871**	**7,091**	**7,965**	**7,902**	**1.2%**	**1.1%**	**1.2%**	**1.2%**			

Source: Utah State Board of Education, Data and Statistics

Table 12.3: Utah Public Education Enrollment by Race and Ethnicity

	FY 2020 Enrollment	African American or Black		American Indian		Asian		Hispanic/ Latino		Pacific Islander		Two or More Races		White	
	10/1/19	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Alpine	81,532	566	0.7%	225	0.3%	665	0.8%	10,075	12.4%	1,007	1.2%	3,276	4.0%	65,718	80.6%
Beaver	1,524	2	0.1%	9	0.6%	5	0.3%	261	17.1%	11	0.7%	18	1.2%	1,218	79.9%
Box Elder	11,914	46	0.4%	69	0.6%	48	0.4%	1,327	11.1%	47	0.4%	171	1.4%	10,206	85.7%
Cache	18,802	99	0.5%	118	0.6%	121	0.6%	1,807	9.6%	90	0.5%	339	1.8%	16,228	86.3%
Canyons	34,178	549	1.6%	118	0.3%	811	2.4%	5,793	16.9%	397	1.2%	1,742	5.1%	24,768	72.5%
Carbon	3,472	12	0.3%	37	1.1%	11	0.3%	471	13.6%	6	0.2%	35	1.0%	2,900	83.5%
Daggett	189	0	0.0%	2	1.1%	0	0.0%	8	4.2%	0	0.0%	4	2.1%	175	92.6%
Davis	72,897	835	1.1%	257	0.4%	822	1.1%	7,754	10.6%	895	1.2%	2,104	2.9%	60,230	82.6%
Duchesne	5,164	21	0.4%	342	6.6%	17	0.3%	346	6.7%	14	0.3%	182	3.5%	4,242	82.1%
Emery	2,141	5	0.2%	9	0.4%	2	0.1%	190	8.9%	0	0.0%	12	0.6%	1,923	89.8%
Garfield	899	2	0.2%	22	2.4%	4	0.4%	80	8.9%	2	0.2%	7	0.8%	782	87.0%
Grand	1,498	4	0.3%	80	5.3%	10	0.7%	270	18.0%	2	0.1%	20	1.3%	1,112	74.2%
Granite	63,989	2,406	3.8%	786	1.2%	2,786	4.4%	22,467	35.1%	2,855	4.5%	904	1.4%	31,785	49.7%
Iron	9,544	46	0.5%	225	2.4%	55	0.6%	968	10.1%	55	0.6%	247	2.6%	7,948	83.3%
Jordan	56,339	601	1.1%	183	0.3%	909	1.6%	8,891	15.8%	936	1.7%	2,418	4.3%	42,401	75.3%
Juab	2,655	12	0.5%	9	0.3%	10	0.4%	100	3.8%	8	0.3%	44	1.7%	2,472	93.1%
Kane	1,275	3	0.2%	18	1.4%	6	0.5%	79	6.2%	1	0.1%	21	1.6%	1,147	90.0%
Logan	5,420	127	2.3%	75	1.4%	169	3.1%	1,679	31.0%	73	1.3%	120	2.2%	3,177	58.6%
Millard	2,973	1	0.0%	25	0.8%	27	0.9%	460	15.5%	3	0.1%	60	2.0%	2,397	80.6%
Morgan	3,194	13	0.4%	8	0.3%	7	0.2%	85	2.7%	8	0.3%	45	1.4%	3,028	94.8%
Murray	6,425	253	3.9%	60	0.9%	140	2.2%	1,304	20.3%	51	0.8%	319	5.0%	4,298	66.9%
Nebo	33,379	191	0.6%	102	0.3%	113	0.3%	4,175	12.5%	286	0.9%	785	2.4%	27,727	83.1%
North Sanpete	2,507	8	0.3%	24	1.0%	4	0.2%	382	15.2%	22	0.9%	53	2.1%	2,014	80.3%
North Summit	1,014	2	0.2%	5	0.5%	2	0.2%	146	14.4%	1	0.1%	9	0.9%	849	83.7%
Ogden	11,460	212	1.8%	90	0.8%	86	0.8%	5,816	50.8%	50	0.4%	340	3.0%	4,866	42.5%
Park City	4,757	34	0.7%	3	0.1%	94	2.0%	1,008	21.2%	5	0.1%	107	2.2%	3,506	73.7%
Piute	279	3	1.1%	1	0.4%	0	0.0%	42	15.1%	0	0.0%	1	0.4%	232	83.2%
Provo	16,603	168	1.0%	135	0.8%	265	1.6%	4,002	24.1%	481	2.9%	596	3.6%	10,956	66.0%
Rich	498	0	0.0%	0	0.0%	0	0.0%	23	4.6%	0	0.0%	14	2.8%	461	92.6%
Salt Lake	22,017	1,019	4.6%	268	1.2%	1,045	4.7%	7,886	35.8%	1,115	5.1%	928	4.2%	9,756	44.3%
San Juan	2,891	7	0.2%	1,549	53.6%	7	0.2%	160	5.5%	2	0.1%	62	2.1%	1,104	38.2%
Sevier	4,548	31	0.7%	88	1.9%	10	0.2%	221	4.9%	32	0.7%	0	0.0%	4,166	91.6%
South Sanpete	3,230	25	0.8%	32	1.0%	5	0.2%	341	10.6%	21	0.7%	64	2.0%	2,742	84.9%
South Summit	1,701	2	0.1%	6	0.4%	1	0.1%	181	10.6%	2	0.1%	16	0.9%	1,493	87.8%
Tintic	214	1	0.5%	0	0.0%	1	0.5%	14	6.5%	0	0.0%	6	2.8%	192	89.7%
Tooele	17,608	148	0.8%	126	0.7%	96	0.5%	2,346	13.3%	190	1.1%	340	1.9%	14,362	81.6%
Uintah	6,989	24	0.3%	546	7.8%	27	0.4%	676	9.7%	33	0.5%	148	2.1%	5,535	79.2%
Wasatch	7,146	37	0.5%	8	0.1%	30	0.4%	1,437	20.1%	9	0.1%	131	1.8%	5,494	76.9%
Washington	33,884	337	1.0%	510	1.5%	286	0.8%	4,707	13.9%	534	1.6%	667	2.0%	26,843	79.2%
Wayne	436	1	0.2%	1	0.2%	6	1.4%	34	7.8%	2	0.5%	9	2.1%	383	87.8%
Weber	32,588	271	0.8%	116	0.4%	298	0.9%	4,192	12.9%	227	0.7%	895	2.7%	26,589	81.6%
Charter Schools	77,630	1,207	1.6%	407	0.5%	2,245	2.9%	15,354	19.8%	1,145	1.5%	2,707	3.5%	54,565	70.3%
State of Utah	**667,403**	**9,331**	**1.4%**	**6,694**	**1.0%**	**11,246**	**1.7%**	**117,558**	**17.6%**	**10,618**	**1.6%**	**19,966**	**3.0%**	**491,990**	**73.7%**

Source: Utah State Board of Education, Data and Statistics

Table 12.4: FY 2019 Statewide Selected Data

School District	FY19 Per Pupil Current Expenditures	Rank	Class of 2019 Graduation Rate	Rank	FY19 Pupil-Teacher Ratio	Rank	FY19 Share of Free and Reduced Students	Rank
Alpine	7,380	40	92%	14	24.7	1	22.4%	37
Beaver	10,852	14	90%	20	19.3	25	44.5%	13
Box Elder	8,335	29	84%	29	22.2	11	33.8%	27
Cache	8,137	31	93%	8	23.3	5	25.8%	35
Canyons	8,616	26	90%	20	22.0	12	28.1%	34
Carbon	10,009	17	92%	14	18.8	29	43.7%	14
Daggett	21,621	1	91%	18	11.3	41	23.7%	36
Davis	7,813	35	96%	4	23.7	3	20.7%	38
Duchesne	9,511	20	82%	36	20.2	21	36.5%	25
Emery	12,203	10	93%	8	17.5	33	49.3%	9
Garfield	12,322	9	93%	8	16.0	35	46.1%	11
Grand	11,987	11	82%	36	15.6	36	38.2%	22
Granite	8,836	24	75%	42	21.4	14	47.7%	10
Iron	7,960	33	84%	29	21.2	15	43.1%	16
Jordan	7,541	39	88%	25	23.1	7	20.5%	39
Juab	8,023	32	97%	3	22.5	10	36.9%	23
Kane	12,526	8	93%	8	18.6	31	39.9%	19
Logan	8,796	25	84%	29	20.8	20	53.6%	6
Millard	11,209	13	94%	6	18.9	28	53.0%	7
Morgan	6,419	42	93%	8	23.0	8	13.6%	42
Murray	8,345	28	76%	41	21.1	17	32.9%	29
Nebo	7,606	38	93%	8	22.6	9	28.5%	33
No. Sanpete	9,227	22	81%	38	21.0	18	54.8%	4
No. Summit	11,376	12	92%	14	18.1	32	33.3%	28
Ogden	9,382	21	79%	40	19.1	26	73.8%	1
Park City	14,574	5	90%	20	15.3	37	19.5%	40
Piute	19,641	2	88%	25	10.0	42	61.5%	3
Provo	8,261	30	90%	20	23.2	6	42.1%	17
Rich	16,132	4	100%	1	14.8	38	36.6%	24
Salt Lake	9,991	18	80%	39	19.7	22	54.8%	5
San Juan	14,183	7	94%	6	16.4	34	72.9%	2
Sevier	9,029	23	86%	28	20.9	19	43.5%	15
So. Sanpete	10,230	15	91%	18	19.4	24	49.8%	8
So. Summit	9,981	19	84%	29	18.6	30	18.2%	41
Tintic	18,353	3	100%	1	11.4	40	39.1%	21
Tooele	7,852	34	83%	34	24.6	2	34.0%	26
Uintah	8,584	27	84%	29	23.3	4	45.2%	12
Wasatch	10,127	16	92%	14	19.6	23	30.3%	32
Washington	7,682	37	90%	20	21.2	16	39.9%	20
Wayne	14,568	6	95%	5	14.1	39	41.4%	18
Weber	7,775	36	87%	27	21.8	13	30.6%	31
Charter Schools	6,953	41	83%	34	19.0	27	32.7%	30
State of Utah	**$8,156**		**87%**		**21.7**		**33.1%**	

Source: Utah State Board of Education, School Finance (Expenditures); Utah State Board of Education, Data and Statistics (Graduation Rate, Pupil-Teacher Ratio); Utah State Board of Education, Child Nutrition Programs (Free & reduced students include directly certified, categorically certified, and income-based National School Lunch Program School Meal applications based on October Survey, 2018).

Table 12.5: College Entrance Exam Scores

	Average ACT Scores by State: 2019						
	% of Graduates Tested	Average English Score	Average Mathematic Score	Average Reading Score	Average Science Score	Average Composite Score	Rank
United States	52	20.1	20.4	21.2	20.6	20.7	
Alabama	100	18.7	18.1	19.5	18.8	18.9	46
Alaska	38	18.9	19.9	20.9	20.2	20.1	32
Arizona	73	17.9	19.2	19.3	19.0	19.0	43
Arkansas	100	19.0	18.7	19.6	19.2	19.3	41
California	23	22.4	22.3	23.0	22.2	22.6	16
Colorado	27	23.8	23.3	24.3	23.4	23.8	13
Connecticut	22	25.9	24.7	26.1	24.8	25.5	1
Deleware	13	23.9	23.1	24.7	23.5	24.0	11
District of Columbia	32	23.6	22.7	24.4	22.9	23.5	15
Florida	54	19.5	19.5	21.2	19.7	20.1	32
Georgia	49	20.9	20.7	22.2	21.2	21.4	23
Hawaii	80	17.9	19.2	19.2	19.2	19.0	43
Idaho	31	21.9	21.9	23.4	22.2	22.5	17
Ilinois	35	24.5	23.8	24.7	23.7	24.3	7
Indiana	29	21.7	22.3	23.1	22.2	22.5	17
Iowa	66	20.8	21.0	22.3	21.8	21.6	21
Kansas	72	20.5	20.7	21.8	21.1	21.2	25
Kentucky	100	19.5	19.2	20.5	19.6	19.8	37
Louisiana	100	18.7	18.2	19.2	18.8	18.8	48
Maine	6	24.2	23.8	25.1	23.7	24.3	7
Maryland	28	22.0	21.7	23.1	22.1	22.3	19
Massachusetts	21	25.5	25.2	26.1	24.8	25.5	1
Michigan	19	24.5	24.0	24.8	24.0	24.4	6
Minnesota	95	20.3	21.4	21.7	21.6	21.4	23
Mississippi	100	18.1	17.9	18.9	18.4	18.4	50
Missouri	82	20.3	20.2	21.3	20.8	20.8	27
Montana	100	18.7	19.7	20.6	19.9	19.8	37
Nebraska	100	19.4	19.7	20.3	20.2	20.0	34
Nevada	100	16.8	18.0	18.2	17.9	17.9	51
New Hampshire	14	24.9	24.7	25.6	24.5	25.0	3
New Jersey	25	24.3	24.0	24.6	23.6	24.2	9
New Mexico	63	18.1	18.9	20.0	19.6	19.3	41
New York	22	24.1	24.1	25.0	24.4	24.5	5
North Carolina	100	17.8	19.2	19.4	19.0	19.0	43
North Dakota	96	18.6	19.9	20.3	20.2	19.9	36
Ohio	100	19.0	19.9	20.5	20.1	20.0	34
Oklahoma	100	18.2	18.3	19.6	19.0	18.9	46
Oregon	42	20.3	20.8	21.7	21.1	21.1	26
Pennsylvania	17	23.3	23.1	24.1	23.2	23.6	14
Rhode Island	12	25.0	23.9	25.5	24.0	24.7	4
South Carolina	78	18.0	18.7	19.4	18.9	18.8	48
South Dakota	75	20.7	21.3	22.2	21.9	21.6	21
Tennessee	100	19.1	18.9	19.7	19.2	19.4	40
Texas	39	19.5	20.4	21.1	20.6	20.5	29
Utah	**100**	**19.5**	**20.0**	**20.8**	**20.3**	**20.3**	**30**
Vermont	20	23.9	23.3	25.0	23.9	24.1	10
Virginia	21	23.8	23.3	24.8	23.6	24.0	11
Washington	24	21.3	22.1	22.7	21.9	22.1	20
West Virginia	49	20.6	19.7	21.7	20.7	20.8	27
Wisconsin	100	19.4	20.2	20.4	20.6	20.3	30
Wyoming	100	18.8	19.4	20.4	20.0	19.8	37

Source: ACT (http://www.act.org)

Table 12.6: Selected Data by State - FY 2016

	Enrollment Oct. 1, 2016	Current Expenditures (Thousands)	Current Expenditures Per Pupil	Rank	CY 2016 Personal Income (Millions)	Current Exp as % of Personal Income	Rank	Pupil/ Teacher Ratio	Rank
United States	50,615,189	$596,135,643	$11,841	-	16,111,636	3.7%	-	16.0	..
Alabama	744,930	6,885,677	9,258	42	190,815	3.6%	32	17.5	43
Alaska	132,737	2,319,662	17,510	6	41,536	5.6%	1	17.0	40
Arizona	1,123,137	8,551,673	7,772	49	282,478	3.0%	48	23.3	51
Arkansas	493,447	4,872,214	9,900	35	120,060	4.1%	14	13.8	15
California	6,309,138	72,003,129	11,420	25	2,263,890	3.2%	42	23.3	50
Colorado	905,019	8,648,369	9,619	39	289,581	3.0%	50	17.4	41
Connecticut	535,118	10,551,327	19,615	3	249,581	4.2%	10	12.6	7
Delaware	136,264	1,941,408	14,397	13	46,042	4.2%	11	14.8	24
District of Columbia	85,850	1,775,833	21,135	2	53,192	3.3%	39	12.8	8
Florida	2,816,791	25,621,239	9,176	43	942,461	2.7%	51	15.1	26
Georgia	1,764,346	17,283,295	9,835	36	439,943	3.9%	18	15.4	30
Hawaii	181,550	2,502,117	13,748	16	72,879	3.4%	37	15.4	31
Idaho	297,200	2,097,992	7,178	50	68,445	3.1%	45	18.3	45
Illinois	2,026,718	29,253,457	14,327	14	670,504	4.4%	7	15.7	35
Indiana	1,049,547	10,144,064	9,691	38	290,148	3.5%	36	17.4	42
Iowa	509,831	5,663,444	11,148	28	145,411	3.9%	20	14.2	21
Kansas	494,347	5,065,968	10,216	32	138,315	3.7%	29	13.7	14
Kentucky	684,017	6,750,052	9,831	37	175,921	3.8%	22	16.3	37
Louisiana	716,293	8,027,058	11,169	27	199,879	4.0%	15	14.8	23
Maine	180,512	2,579,299	14,202	15	59,697	4.3%	8	12.2	4
Maryland	886,221	12,774,063	14,523	12	354,451	3.6%	33	14.8	25
Massachusetts	964,514	16,374,676	16,986	7	446,918	3.7%	27	13.3	11
Michigan	1,528,666	16,977,163	11,051	29	446,521	3.8%	24	18.3	44
Minnesota	875,021	10,687,048	12,364	19	293,894	3.6%	30	15.4	32
Mississippi	483,150	4,234,977	8,692	47	106,424	4.0%	16	15.1	27
Missouri	915,040	9,545,816	10,385	31	269,881	3.5%	34	13.5	12
Montana	146,375	1,652,848	11,374	26	45,508	3.6%	31	13.9	16
Nebraska	319,194	3,911,805	12,379	18	94,731	4.1%	12	13.5	13
Nevada	473,744	4,092,457	8,753	45	131,294	3.1%	43	20.0	47
New Hampshire	180,888	2,833,893	15,535	10	75,817	3.7%	25	12.3	5
New Jersey	1,410,421	26,825,114	19,041	4	556,440	4.8%	5	12.2	3
New Mexico	336,263	3,343,152	9,959	34	81,252	4.1%	13	15.8	36
New York	2,729,776	59,161,439	22,231	1	1,202,569	4.9%	3	13.1	9
North Carolina	1,550,062	13,466,942	8,717	46	433,196	3.1%	44	15.5	33
North Dakota	109,706	1,451,309	13,358	17	39,622	3.7%	28	11.8	2
Ohio	1,710,143	20,484,182	11,933	20	524,044	3.9%	19	16.7	38
Oklahoma	693,903	5,606,044	8,091	48	164,419	3.4%	38	16.9	39
Oregon	606,277	6,238,574	10,823	30	190,241	3.3%	40	20.4	48
Pennsylvania	1,727,497	26,045,127	15,165	11	659,803	3.9%	17	14.1	19
Rhode Island	142,150	2,283,927	16,082	9	53,426	4.3%	9	13.3	10
South Carolina	771,250	7,669,725	10,045	33	200,333	3.8%	23	15.2	28
South Dakota	136,302	1,253,268	9,335	41	41,960	3.0%	49	13.9	17
Tennessee	1,001,562	8,886,994	8,876	44	290,560	3.1%	47	15.6	34
Texas	5,360,849	49,577,688	9,352	40	1,274,395	3.9%	21	15.2	29
Utah	**659,801**	**4,539,291**	**7,006**	**51**	**128,929**	**3.5%**	**35**	**22.9**	**49**
Vermont	88,428	1,671,433	19,023	5	31,679	5.3%	2	10.8	1
Virginia	1,287,026	14,677,698	11,435	23	450,870	3.3%	41	14.0	18
Washington	1,101,711	12,483,668	11,484	22	407,654	3.1%	46	18.7	46
West Virginia	273,855	3,169,684	11,424	24	67,618	4.7%	6	14.1	20
Wisconsin	864,432	10,122,041	11,664	21	274,505	3.7%	26	14.6	22
Wyoming	94,170	1,556,321	16,431	8	31,908	4.9%	4	12.5	6

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

Higher Education

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2019 OVERVIEW

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

Utah's public colleges and universities enrolled over 9,300 additional students in the 2019-20 school year for a net increase of 5.3 percent over Fall 2018. Eight out of 10 Utah high school graduates who enroll in college attend one of Utah's public colleges and universities. Collectively, Utah's public colleges and universities enroll nearly 190,000 students. Utah System of Higher Education's (USHE) 10-year enrollment projections are expected to outpace the country with an anticipated 57,000 additional students coming to USHE campuses over the next 10 years.

The USHE Board of Regents has strategically focused its efforts on areas of postsecondary education that are most urgent and where the Board can have the most statewide impact. In the upcoming year the Board will focus on the following key areas to improve the success of students and in turn support the state's economy:

1. Access to postsecondary education
2. Seamless credit transfer between institutions
3. Institutional efficiency and quality
4. Workforce alignment and demand

College Access

Less than half of Utah high school graduates go on to college the following year, putting Utah near the bottom of the nation for college participation.

This is at the same time that a college degree or certificate is more important than ever before for economic and personal success. The USHE Board of Regents has set the ambitious goal of increasing the college participation rate by 5% over the next three years. To reach the goal, USHE is committed to working closely with K-12 partners, providing a college access advisor for all Utah high schools, running a robust and relevant Concurrent Enrollment program, and reprioritizing state scholarship dollars toward Utahns who cannot afford college.

The USHE Board of Regents plans to provide a college access advisor, full-time, for every high school in the state by 2021. These recent college graduates help students register for and complete college entrance exams, submit college applications, apply for scholarships and financial aid, and connect them to first-year experience programs to at their college campus. For every meeting with a college access advisor, students are 13% more likely to enroll and 5% more likely to graduate from college.

With the support of the USHE Board of Regents and the Commissioner's Office, the program has expanded to 34 high schools across the state for the 2019-2020 school year.

Concurrent Enrollment courses allow Utah high school juniors and seniors to earn high school credit and college credit for USHE institutions during their school day. In 2018-19, high school students earned a total of 285,710 college credits, 6.5 percent more than last year. A total of 38,907 Utah high school students participated in earning Concurrent Enrollment credit—up 7.1 percent from the previous school year. These courses will save students an estimated $54 million in future tuition expenses.

Paying for College

Utah ranked third lowest in the nation for tuition and fees for public, four-year universities (per year average cost of $7,160 vs $10,440 nationally).

To ensure the best use of state scholarship dollars, the Board recommended prioritizing state dollars toward the Utah Promise Scholarship and simplifying

the existing Regents' Scholarship. Implementation will begin in 2020.

Students who qualify can receive financial aid from the federal government. Qualification is determined through the Free Application for Student Aid (FAFSA). While Utah has made substantial progress in helping students complete the FAFSA—42% of high school seniors filled out the application for the 2019-2020 cycle, a 6% increase over the previous year—Utah remains second to last in the nation for FAFSA completion.

Utah has the lowest average student debt in the country at $19,750 compared to the national average of $29,200. Utah is also the top-ranked state for the lowest percentage of graduates with student debt at 36%, compared to 65% nationally.

Funding Higher Education

For the 2020 fiscal year, Utah's legislature approved a $96.1 million increase (9.4 percent) in ongoing tax funds and a one-time increase of $2.2 million (0.2 percent) to the state's higher education budget.

Workforce Alignment

Increased Wages of USHE Graduates

Bachelor's degree graduates earned 69 percent more than those with only a high school diploma. Bachelor's degree graduates also earn an estimated 51 percent increase in wages over five years. With increased wages comes increased spending and saving capacity that will contribute to economic growth at a substantially higher rate than the non-degree holding population.

Career & Technical Education (CTE)

More than 71,000 higher education students enrolled in a CTE course from a USHE institution during the 2018-19 school year. More than 110 new CTE certificate programs were developed by USHE institutions as a result of direct collaboration with business and industry leaders. Economically relevant credentials were awarded to over 6,000 students, who on average will earn annual salaries between $51,000 and $71,000 in five years.

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

Year	Fall Enrollment	Annual Change		Estimated State Pop.	Annual Change		Enrollment/ Population
		Absolute	Percent		Absolute	Percent	
1980	61,115	3,474	6.0%	1,474,000	58,050	4.1%	4.1%
1981	63,090	1,975	3.2%	1,515,000	41,000	2.8%	4.2%
1982	67,056	3,966	6.3%	1,558,000	43,000	2.8%	4.3%
1983	69,579	2,523	3.8%	1,595,000	37,000	2.4%	4.4%
1984	69,212	-367	-0.5%	1,622,000	27,000	1.7%	4.3%
1985	70,615	1,403	2.0%	1,643,000	21,000	1.3%	4.3%
1986	72,674	2,059	2.9%	1,663,000	20,000	1.2%	4.4%
1987	73,088	414	0.6%	1,678,000	15,000	0.9%	4.4%
1988	74,929	1,841	2.5%	1,690,000	12,000	0.7%	4.4%
1989	74,884	-45	-0.1%	1,706,000	16,000	0.9%	4.4%
1990	80,430	5,546	7.4%	1,729,227	23,227	1.4%	4.7%
1991	86,843	6,413	8.0%	1,780,870	51,643	3.0%	4.9%
1992	94,923	8,080	9.3%	1,838,149	57,279	3.2%	5.2%
1993	99,163	4,240	4.5%	1,889,393	51,244	2.8%	5.2%
1994	103,633	4,470	4.5%	1,946,721	57,328	3.0%	5.3%
1995	110,594	6,961	6.7%	1,995,228	48,507	2.5%	5.5%
1996	112,666	2,072	1.9%	2,042,893	47,665	2.4%	5.5%
1997	116,047	3,381	3.0%	2,099,409	56,516	2.8%	5.5%
1998	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%	2,246,468	53,539	2.4%	5.4%
2001	126,377	3,960	3.2%	2,290,634	44,166	2.0%	5.5%
2002	134,939	8,562	6.8%	2,331,826	41,192	1.8%	5.8%
2003	138,625	3,686	2.7%	2,372,458	40,632	1.7%	5.8%
2004	140,933	2,308	1.7%	2,430,223	57,765	2.4%	5.8%
2005	144,937	4,004	2.8%	2,505,843	75,620	3.1%	5.8%
2006	144,302	-635	-0.4%	2,576,229	70,386	2.8%	5.6%
2007	140,397	-3,905	-2.7%	2,636,075	59,846	2.3%	5.3%
2008	152,228	11,831	8.4%	2,691,122	55,047	2.1%	5.7%
2009	164,860	12,632	8.3%	2,731,560	40,438	1.5%	6.0%
2010	171,178	6,318	3.8%	2,772,371	40,811	1.5%	6.2%
2011	174,013	2,835	1.7%	2,820,613	48,242	1.7%	6.2%
2012	171,291	-2,722	-1.6%	2,864,744	44,131	1.6%	6.0%
2013	167,594	-3,697	-2.2%	2,902,179	37,435	1.3%	5.8%
2014	167,317	-277	-0.2%	2,941,964	39,785	1.4%	5.7%
2015	170,770	3,453	2.1%	2,997,584	55,620	1.9%	5.7%
2016	175,165	4,395	2.6%	3,054,994	57,410	1.9%	5.7%
2017	180,034	4,869	2.8%	3,113,983	58,989	1.9%	5.8%
2018	183,949	3,915	2.2%	3,166,666	45,132	1.4%	5.8%
2019	189,351	9,317	5.3%	3,220,262	106,279	3.4%	5.9%

Source: Utah System of Higher Education, Common Data Committee; 1980-2009: Utah Population Estimates Committee. 2010-2017: Utah Population

Table 13.2: Utah System of Higher Education Enrollment by County

County	Fall 2016	Fall 2017	Fall 2018	Fall 2019	Total Annual Change			Percent Change			Size	Rank Previous	Change
					2016 to 2017	2017 to 2018	2018 to 2019	2016 to 2017	2017 to 2018	2018 to 2019			
Beaver	302	318	313	280	16	-5	-33	5.3%	-1.6%	-10.5%	26	25	
Box Elder	1,769	1,704	1,622	1,492	-65	-82	-130	-3.7%	-4.8%	-8.0%	14	14	0
Cache	4,666	4,336	3,943	3,570	-330	-393	-373	-7.1%	-9.1%	-9.5%	9	9	0
Carbon	665	581	525	402	-84	-56	-123	-12.6%	-9.6%	-23.4%	22	21	
Daggett	27	28	28	30	1	0	2	3.7%	0.0%	7.1%	32	32	0
Davis	18,314	18,825	19,211	19,750	511	386	539	2.8%	2.1%	2.8%	4	4	0
Duchesne	463	413	456	423	-50	43	-33	-10.8%	10.4%	-7.2%	21	22	1
Emery	359	332	365	320	-27	33	-45	-7.5%	9.9%	-12.3%	25	24	
Garfield	223	211	208	184	-12	-3	-24	-5.4%	-1.4%	-11.5%	28	27	
Grand	212	195	199	185	-17	4	-14	-8.0%	2.1%	-7.0%	27	28	1
Iron	2,736	2,617	2,429	2,426	-119	-188	-3	-4.3%	-7.2%	-0.1%	10	10	0
Juab	539	544	554	511	5	10	-43	0.9%	1.8%	-7.8%	19	20	1
Kane	265	275	296	323	10	21	27	3.8%	7.6%	9.1%	24	26	2
Millard	621	662	641	656	41	-21	15	6.6%	-3.2%	2.3%	17	17	0
Morgan	582	569	604	642	-13	35	38	-2.2%	6.2%	6.3%	18	18	0
Piute	64	60	81	80	-4	21		-6.3%	35.0%	-1.2%	30	31	1
Rich	97	98	103	77	1	5	-26	1.0%	5.1%	-25.2%	31	30	
Salt Lake	47,805	48,680	48,166	48,150	875	-514	-16	1.8%	-1.1%	-0.0%	1	1	0
San Juan	496	472	450	367	-24	-22	-83	-4.8%	-4.7%	-18.4%	23	23	0
Sanpete	1,401	1,447	1,545	1,486	46	98	-59	3.3%	6.8%	-3.8%	15	15	0
Sevier	979	1,100	1,153	1,183	121	53	30	12.4%	4.8%	2.6%	16	16	0
Summit	1,494	1,767	1,862	1,922	273	95	60	18.3%	5.4%	3.2%	12	12	0
Tooele	2,169	2,116	2,084	1,946	-53	-32	-138	-2.4%	-1.5%	-6.6%	11	11	0
Uintah	535	527	574	490	-8	47	-84	-1.5%	8.9%	-14.6%	20	19	
Utah	25,175	29,946	31,281	32,402	4,771	1,335	1,121	19.0%	4.5%	3.6%	2	2	0
Wasatch	1,371	1,575	1,783	1,741	204	208	-42	14.9%	13.2%	-2.4%	13	13	0
Washington	6,570	6,902	7,138	7,821	332	236	683	5.1%	3.4%	9.6%	7	7	0
Wayne	121	108	121	103	-13	13	-18	-10.7%	12.0%	-14.9%	29	29	0
Weber	10,608	10,900	10,690	11,039	292	-210	349	2.8%	-1.9%	3.3%	6	6	0
Other US Locations	22,747	26,729	28,022	28,264	3,982	1,293	242	17.5%	4.8%	0.9%	3	3	0
Foreign Locations	7,683	5,648	5,503	5,832	-2,035	-145	329	-26.5%	-2.6%	6.0%	8	8	0
Unknown/ Unidentified	14,107	10,349	11,999	15,254	-3,758	1,650	3,255	-26.6%	15.9%	27.1%	5	5	0
Total	**175,165**	**180,034**	**183,949**	**189,351**	**4,869**	**3,915**	**5,402**	**2.8%**	**2.2%**	**2.9%**			

Source: Utah System of Higher Education

Table 13.3: Fall Semester 2019 (Third Week) Total Headcount Enrollment by County of Origin and Ethnicity

	Indian or Alaskan Native		Hispanic		Asian		Pacific Islander		Black/ African American		White		Unknown		Non-Resident Alien		Multiple		USHE	
County	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Beaver	4	1.4%	23	8.2%	5	1.8%		0.0%		0.0%	203	72.5%	43	15.4%		0.0%	2	0.7%	280	0.1%
Box Elder	6	0.4%	104	7.0%	10	0.7%	4	0.3%	8	0.5%	1,286	86.2%	36	2.4%		0.0%	38	2.5%	1,492	0.8%
Cache	8	0.2%	282	7.9%	53	1.5%	8	0.2%	27	0.8%	2,842	79.6%	248	6.9%	15	0.4%	87	2.4%	3,570	1.9%
Carbon	4	1.0%	49	12.2%	3	0.7%		0.0%		0.0%	337	83.8%	3	0.7%		0.0%	6	1.5%	402	0.2%
Daggett		0.0%		0.0%		0.0%		0.0%		0.0%	29	96.7%	1	3.3%		0.0%		0.0%	30	0.0%
Davis	71	0.4%	1,607	8.1%	377	1.9%	112	0.6%	176	0.9%	15,669	79.3%	896	4.5%	25	0.1%	817	4.1%	19,750	10.4%
Duchesne	12	2.8%	17	4.0%	1	0.2%		0.0%		0.0%	375	88.7%	11	2.6%		0.0%	7	1.7%	423	0.2%
Emery		0.0%	12	3.8%	2	0.6%	1	0.3%	1	0.3%	294	91.9%	3	0.9%		0.0%	7	2.2%	320	0.2%
Garfield	2	1.1%	14	7.6%		0.0%		0.0%	1	0.5%	157	85.3%	9	4.9%		0.0%	1	0.5%	184	0.1%
Grand	2	1.1%	19	10.3%	1	0.5%	1	0.5%	1	0.5%	150	81.1%	5	2.7%		0.0%	6	3.2%	185	0.1%
Iron	28	1.2%	164	6.8%	19	0.8%	15	0.6%	20	0.8%	1,821	75.1%	319	13.1%	5	0.2%	35	1.4%	2,426	1.3%
Juab	1	0.2%	17	3.3%		0.0%	1	0.2%	2	0.4%	474	92.8%	2	0.4%		0.0%	14	2.7%	511	0.3%
Kane	2	0.6%	12	3.7%	4	1.2%		0.0%		0.0%	297	92.0%	1	0.3%		0.0%	7	2.2%	323	0.2%
Millard	1	0.2%	50	7.6%	8	1.2%		0.0%	1	0.2%	578	88.1%	10	1.5%		0.0%	8	1.2%	656	0.3%
Morgan	1	0.2%	18	2.8%		0.0%	1	0.2%	4	0.6%	579	90.2%	26	4.0%		0.0%	13	2.0%	642	0.3%
Piute		0.0%	10	12.5%	1	1.3%	1	1.3%	1	1.3%	63	78.8%	4	5.0%		0.0%		0.0%	80	0.0%
Rich		0.0%	2	2.6%		0.0%		0.0%		0.0%	72	93.5%	1	1.3%		0.0%	2	2.6%	77	0.0%
Salt Lake	227	0.5%	8,133	16.9%	2,249	4.7%	503	1.0%	907	1.9%	33,121	68.8%	1,113	2.3%	61	0.1%	1,836	3.8%	48,150	25.4%
San Juan	134	36.5%	9	2.5%	1	0.3%	2	0.5%	1	0.3%	205	55.9%	7	1.9%		0.0%	8	2.2%	367	0.2%
Sanpete	8	0.5%	120	8.1%	8	0.5%	7	0.5%	3	0.2%	1,292	86.9%	20	1.3%	10	0.7%	18	1.2%	1,486	0.8%
Sevier	34	2.9%	58	4.9%	2	0.2%	3	0.3%	1	0.1%	1,047	88.5%	15	1.3%		0.0%	23	1.9%	1,183	0.6%
Summitt	1	0.1%	251	13.1%	19	1.0%	1	0.1%	10	0.5%	1,536	79.9%	33	1.7%	1	0.1%	70	3.6%	1,922	1.0%
Tooele	14	0.7%	225	11.6%	13	0.7%	6	0.3%	15	0.8%	1,557	80.0%	53	2.7%	2	0.1%	61	3.1%	1,946	1.0%
Unitah	25	5.1%	25	5.1%	3	0.6%	1	0.2%	2	0.4%	411	83.9%	8	1.6%		0.0%	15	3.1%	490	0.3%
Utah	134	0.4%	3,873	12.0%	463	1.4%	229	0.7%	205	0.6%	25,926	80.0%	448	1.4%	65	0.2%	1,059	3.3%	32,402	17.1%
Wasach	8	0.5%	201	11.5%	34	2.0%	1	0.1%	10	0.6%	1,399	80.4%	36	2.1%		0.0%	52	3.0%	1,741	0.9%
Washington	51	0.7%	839	10.7%	86	1.1%	79	1.0%	41	0.5%	6,340	81.1%	132	1.7%	23	0.3%	230	2.9%	7,821	4.1%
Wayne		0.0%	1	1.0%	1	1.0%	1	1.0%		0.0%	99	96.1%	1	1.0%		0.0%		0.0%	103	0.1%
Weber	42	0.4%	1,631	14.8%	172	1.6%	31	0.3%	115	1.0%	8,165	74.0%	481	4.4%	38	0.3%	364	3.3%	11,039	5.8%
Other US Locations	380	1.3%	3,135	11.1%	821	2.9%	264	0.9%	788	2.8%	20,059	71.0%	1,289	4.6%	187	0.7%	1,341	4.7%	28,264	14.9%
Foreign Locations	1	0.0%	212	3.6%	173	3.0%	14	0.2%	62	1.1%	268	4.6%	380	6.5%	4,691	80.4%	31	0.5%	5,832	3.1%
Unknown/ Unidentified	199	1.3%	1,115	7.3%	171	1.1%	54	0.4%	92	0.6%	12,513	82.0%	659	4.3%	117	0.8%	334	2.2%	15,254	8.1%
Total	**1,400**	**0.7%**	**22,228**	**11.7%**	**4,700**	**2.5%**	**1,340**	**0.7%**	**2,494**	**1.3%**	**139,164**	**73.5%**	**6,293**	**3.3%**	**5,240**	**2.8%**	**6,492**	**3.4%**	**189,351**	**100.0%**

Note: Students who were listed with both a race/ethnicity code and as non-resident aliens are reported as non-resident aliens.
Source: Utah System of Higher Education

Table 13.4: Degrees and Awards by Race/Ethnicity at Public Institutions in Utah: Academic Year 2018–2019

USHE Institution	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	8,758	5,977	107	25	449	22	869	340	724	245
Utah State University	6,978	5,747	51	90	109	23	389	140	124	305
Weber State University	5,615	4,332	52	27	119	14	468	145	111	347
Southern Utah University	2,763	1,832	56	17	38	31	169	22	95	503
Snow College	1,142	1,007	16	10	8	12	35		35	19
Dixie State University	2,309	1,858	39	15	39		235	50	34	39
Utah Valley State College	6,304	5,026	46	34	63	35	609	176	200	115
Salt Lake Community College	4,753	3,346	96	32	205	27	791	130	73	53
Total Public	38,622	29,125	463	250	1,030	164	3,565	1,003	1,396	1,626
Percent of Total		75.4%	1.2%	0.6%	2.7%	0.4%	9.2%	2.6%	3.6%	4.2%

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

Table 13.5: 2018-2019 Full Cost Study Summary (Appropriated Funds Only)

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

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

Table 13.6: USHE Summary of Tuition and Fees by Institution

USHE 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	2015–16	2016–17	2017–18	2018–19	2019-20
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	$8,197	$8,518	$8,824	$9,222	$9,500
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	$26,022	$27,039	$28,067	$29,215	$30,134
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	$6,664	$6,866	$7,175	$7,424	$7,659
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	$19,133	$19,772	$20,727	$21,505	$22,197
Utah State University - Eastern (Price)																				
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	$3,490	$3,595	$3,750	$3,896	$4,038
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	$6,480	$6,689	$6,999	$10,600	$11,023
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	$5,339	$5,523	$5,712	$5,859	$5,986
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	$14,252	$14,749	$15,260	$15,646	$15,969
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	$6,300	$6,530	$6,676	$6,770	$6,770
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	$19,132	$19,810	$20,288	$20,586	$20,586
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	$3,484	$3,592	$3,692	$3,742	$3,836
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	$11,676	$12,070	$12,382	$12,562	$12,876
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	$4,620	$4,840	$5,080	$5,253	$5,496
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	$13,206	$13,855	$14,548	$15,051	$15,792
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	$5,386	$5,530	$5,432	$5,726	$5,820
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	$15,202	$15,690	$16,066	$16,296	$16,570
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	$3,568	$3,689	$4,009	$3,843	$3,929
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	$11,020	$11,728	$12,020	$12,206	$12,460

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

Table 13.7: History of Degrees by Public Institutions in Utah

Degree	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	1-Year Change		5-Year Change	
									Absolute	Percent	Absolute	Percent
University Totals												
University of Utah	7,825	8,155	8,023	8,183	8,169	8,554	8,604	8,758	154	1.8%	735	9.2%
Utah State University1	5,515	5,483	5,795	6,082	6,231	6,446	6,642	6,978	336	5.1%	1,183	20.4%
Weber State University	4,505	4,736	4,690	5,086	5,105	5,191	5,380	5,615	235	4.4%	925	19.7%
Southern Utah University	1,606	1,743	1,565	1,545	1,736	2,177	2,357	2,763	406	17.2%	1,198	76.5%
Snow College	1,088	936	745	856	968	1,020	1,055	1,142	87	8.2%	397	53.3%
Dixie State University	2,051	2,028	2,003	1,941	1,919	1,935	2,034	2,309	275	13.5%	306	15.3%
Utah Valley University	4,559	4,611	5,242	5,082	5,107	5,024	6,084	6,304	220	3.6%	1,062	20.3%
Salt Lake Community College	4,190	4,049	4,428	4,022	4,587	6,354	5,600	4,753	-847	-15.1%	325	7.3%
Total Public	31,339	31,741	32,491	32,797	33,822	36,701	37,756	38,622	866	2.3%	6,131	18.9%
Certificates & Awards*												
University of Utah	379	369	397	222	386	410	430	488	58	4.9%	91	16.5%
Utah State University1	82	71	205	247	237	214	258	390	132	20.6%	185	263.4%
Weber State University	59	80	75	90	118	110	144	163	19	30.9%	88	80.0%
Southern Utah University	15	19	9	21	31	113	163	282	119	44.2%	273	757.9%
Snow College	281	205	44	47	79	74	125	126	1	68.9%	82	-39.0%
Dixie State University	437	384	344	316	299	288	390	594	204	35.4%	250	1.6%
Utah Valley University	92	35	85	113	178	204	331	352	21	62.3%	267	845.7%
Salt Lake Community College	640	564	646	640	900	2667	2,428	1,533	-895	-9.0%	887	330.5%
Total Certificates & Awards	1,985	1,727	1,805	1,696	2,228	4,080	4,269	3,928	-341	4.6%	2,123	147.2%
Associate's												
Utah State University1	973	851	1,000	1,272	1,252	1,451	1,346	1,100	-246	-7.2%	100	58.2%
Weber State University	1,997	1,995	1,994	2,216	2,245	2,361	2,473	2,670	197	4.7%	676	24.0%
Southern Utah University	352	421	337	294	532	641	821	906	85	28.1%	569	95.0%
Snow College	807	731	694	801	864	929	910	979	69	-2.0%	285	24.5%
Dixie State College	1,131	1,132	1,150	1,013	974	923	894	901	7	-3.1%	-249	-21.0%
Utah Valley University	1,831	1,768	2,280	1,996	1,929	1,784	2,336	2,231	-105	30.9%	-49	32.1%
Salt Lake Community College	3,550	3,485	3,782	3,382	3,687	3,687	3,172	3,220	48	-14.0%	-562	-9.0%
Total Associate's	10,641	10,383	11,237	10,974	11,483	11,776	11,952	12,007	55	1.5%	770	15.1%
Baccalaureate												
University of Utah	4,919	5,139	5,092	5,246	5,167	5,214	5,263	5,237	-26	0.9%	145	2.4%
Utah State University	3,371	3,557	3,548	3,551	3,810	3,846	3,952	4,531	579	2.8%	983	11.1%
Weber State University	2,157	2,360	2,349	2,505	2,488	2,458	2,414	2,451	37	-1.8%	102	2.3%
Southern Utah University	925	988	954	928	895	1,043	961	1,157	196	-7.9%	203	-2.7%
Snow College			7	8	25	17	20	37	17	17.6%	30	—
Dixie State College	483	512	509	612	646	724	750	814	64	3.6%	305	46.5%
Utah Valley University	2,612	2,739	2,825	2,915	2,903	2,940	3,224	3,471	247	9.7%	646	17.7%
Total Baccalaureate	14,467	15,295	15,284	15,765	15,934	16,242	16,584	17,698	1,114	2.1%	2,414	8.4%
Master's												
University of Utah	1,809	1,921	1,823	1,948	1,901	2,140	2,155	2,198	43	0.7%	375	12.2%
Utah State University	990	895	927	904	830	838	979	839	-140	16.8%	-88	9.4%
Weber State University	292	301	272	275	254	262	349	331	-18	33.2%	59	15.9%
Southern Utah University	314	315	265	302	278	380	412	418	6	8.4%	153	30.8%
Utah Valley University	24	69	52	58	97	96	193	250	57	101.0%	198	179.7%
Total Master's	3,429	3,501	3,339	3,487	3,360	3,716	4,088	4,036	-52	10.0%	697	16.8%
Doctorate												
University of Utah	339	324	330	384	331	339	346	376	30	2.1%	46	6.8%
Utah State University	94	105	109	102	94	95	99	113	14	4.2%	4	-5.7%
Total Doctorate	433	429	439	486	425	434	445	489	44	2.5%	50	3.7%
First Professional												
University of Utah	379	402	381	383	384	451	410	459	49	-9.1%	78	2.0%
Utah State University	5	4	6	6	8	2	8	5	-3	300.0%		100.0%
Total First Professional	384	406	387	389	392	453	418	464	46	-7.7%	77	3.0%

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

Table 13.8: Public Institutions in Utah Total Degrees and Awards by Instructional Program 2018-2019

Classification of Instructional Program (CIP)	U of U	USU	WSU	SUU	SNOW	DSU	UVU	SLCC	USHE Total
AGRICULTURE, AGRICULTURE OPERATIONS, AND RELATED SCIENCES	0	219	0	25	23	0	0	0	267
ARCHITECTURE AND RELATED SERVICES	76	30	0	0	0	0	0	9	115
AREA, ETHNIC, CULTURAL, GENDER, AND GROUP STUDIES	79	49	0	0	0	0	0	0	128
BIOLOGICAL AND BIOMEDICAL SCIENCES	256	190	108	78	4	43	151	12	842
BUSINESS, MANAGEMENT, MARKETING, AND RELATED SUPPORT SERVICES	1,354	838	701	244	69	231	1,120	380	4,937
COMMUNICATION, JOURNALISM, AND RELATED PROGRAMS	364	172	139	91	6	126	179	31	1,108
COMMUNICATIONS TECHNOLOGIES/TECHNICIANS AND SUPPORT SERVICES	0	0	0	0	0	0	13	89	102
COMPUTER AND INFORMATION SCIENCES AND SUPPORT SERVICES	588	219	319	35	18	60	410	672	2,321
CONSTRUCTION TRADES	0	1	2	37	3	0	64	45	152
EDUCATION	215	859	162	270	33	72	367	60	2,038
ENGINEERING	838	410	42	14	23	9	68	57	1,461
ENGINEERING TECHNOLOGIES AND ENGINEERING-RELATED FIELDS	6	262	200	30	0	0	127	78	703
ENGLISH LANGUAGE AND LITERATURE/LETTERS	151	133	76	39	8	11	90	20	528
FAMILY AND CONSUMER SCIENCES/HUMAN SCIENCES	174	265	76	97	11	0	11	7	641
FOREIGN LANGUAGES, LITERATURES, AND LINGUISTICS	101	21	92	7	4	9	61	10	305
HEALTH PROFESSIONS AND RELATED PROGRAMS	1,131	651	1,772	78	124	504	415	570	5,245
HISTORY	58	55	23	16	1	8	49	10	220
HOMELAND SECURITY, LAW ENFORCEMENT, FIREFIGHTING AND RELATED PROTECTIVE SERVICES	1	27	91	46	4	62	383	76	690
LEGAL PROFESSIONS AND STUDIES	113	20	0	4	0	0	15	24	176
LIBERAL ARTS AND SCIENCES, GENERAL STUDIES AND HUMANITIES	33	1,056	1,353	1,185	615	969	1,227	1,965	8,403
MATHEMATICS AND STATISTICS	126	64	39	5	1	7	32	11	285
MECHANIC AND REPAIR TECHNOLOGIES/TECHNICIANS	0	53	27	0	25	4	66	100	275
MILITARY TECHNOLOGIES AND APPLIED SCIENCES	0	0	0	0	0	0	3	0	3
MULTI/INTERDISCIPLINARY STUDIES	212	73		19		43	70	1	418
NATURAL RESOURCES AND CONSERVATION	60	126	0	0	10	0	7	1	204
PARKS, RECREATION, LEISURE, AND FITNESS STUDIES	317	18	31	98	0	41	126	11	642
PERSONAL AND CULINARY SERVICES	0	3	0	0	13	0	40	39	95
PHILOSOPHY AND RELIGIOUS STUDIES	40	23	4	8	0	0	20	0	95
PHYSICAL SCIENCES	290	65	36	20	1	4	46	13	475
PRECISION PRODUCTION	0	6	0	0	13	0	7	48	74
PSYCHOLOGY	483	215	68	62	14	47	462	134	1,485
PUBLIC ADMINISTRATION AND SOCIAL SERVICE PROFESSIONS	353	96	41	66	8	0	105	18	687
SCIENCE TECHNOLOGIES/TECHNICIANS	0	0	60	0	0	0	0	38	98
SOCIAL SCIENCES	928	583	82	56	13	11	51	78	1,802
TRANSPORTATION AND MATERIALS MOVING	0	44	0	37	0	0	214	64	359
VISUAL AND PERFORMING ARTS	411	132	71	96	98	48	305	82	1,243
Grand Total	**8,758**	**6,978**	**5,615**	**2,763**	**1,142**	**2,309**	**6,304**	**4,753**	**38,622**

Source: USHE Database, Academic Year 2018-2019

Table 13.9: USHE Fall Semester Student and FTE Growth: 2018–2019

USHE Institution	Total Headcount			Full-Time Equivalent Students		
	2018	2019	% Change	2018	2019	% Change
University of Utah	33,023	32,852	-0.5%	28,382	28,445	0.2%
Utah State University	27,932	27,810	-0.4%	22,351	22,065	-1.3%
Weber State University	28,247	29,644	4.9%	17,422	17,995	3.3%
Southern Utah University	10,196	11,224	10.1%	8,076	8,416	4.2%
Snow College	5,514	5,383	-2.4%	3,989	3,900	-2.2%
Dixie State University	9,950	11,193	12.5%	7,522	8,144	8.3%
Utah Valley University	39,931	41,728	4.5%	26,574	27,531	3.6%
Salt Lake Community College	29,156	29,517	1.2%	15,203	15,230	0.2%
Total	**183,949**	**189,351**	**2.9%**	**129,520**	**131,726**	**1.7%**

Note: Institutions are sorted by the type of institution and the year they were founded. Full-time equivalent students are based on budget-related and self-support enrollments (rounded).
Source: Utah System of Higher Education, Third Week Data

Table 13.10: Summary of Tuition and Fees for Major Private Institutions

Institution	2010–11	2011–12	2012–13	2013–14	2014–15	2015–16	2016–17	2017–18	2018–19	2019-20
Brigham Young University										
LDS Student	$4,420	$4,560	$4,710	$4,850	$5,000	$5,150	$5,300	$5,460	$5,620	$5,790
Non-LDS Student	$8,840	$9,120	$9,420	$9,700	$10,000	$10,300	$10,600	$10,920	$11,240	$11,580
LDS Business College										
LDS Student				$3,060	$3,060	$3,160	$3,240	$3,340	$3,440	$3,440
Non-LDS Student				$6,120	$6,120	$6,320	$6,480	$6,680	$6,880	$6,880
Westminster College										
Full-time Rate	$25,560	$26,712	$27,720	$28,992	$29,856	$30,720	$32,104	$32,520	$33,480	$34,984
Western Governor's University										
Rate per calendar year*								$6,958	$7,573	$7,657

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

Agriculture

14

Sterling C. Brown, Utah Farm Bureau Federation

2019 OVERVIEW

General

Total agriculture receipts, or the market value of agricultural commodities, totaled $1.69 billion in 2018, down 2.9% from 2017's $1.74 billion. The farm, forestry, fishing, and related activities sectors provided 25,361 jobs earning a total of $360.6 million.[1]

In 2018, Utah had an estimated 11 million acres in farmland (8.6 million acres were pastureland), 20.9% of Utah's total 52.6 million acres of land. This ranks Utah as 26th in the country in total land in farms. Utah is home to 18,100 agriculture operations (ranked 37th nationally), down 100 operations from 2017. Utah's average farm size is 591 acres (ranked 12th nationally), down slightly (2.1%) compared with 604 acres in 2017.

Top Counties

Utah's top five counties for 2018 agricultural sales were Utah ($212 million), Beaver ($202 million), Millard ($182 million), Sanpete ($175 million) and Box Elder ($158 million).[2]

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

Production

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

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

Nationally, Utah ranks second in mink pelt production, second in tart cherry production, third in wool production, fifth in safflower production, 16th in hog and pig production, 21st in dairy cow production, and 28th in beef cows.

Sales and Prices

In 2018, there were 790,000 beef cattle and calves, down from 800,000 in 2017, a 1.3% decrease. Cattle and calves sales also decreased over the same period from $490 million to $457 million, a 6.7% decrease. There were also 710,000 hogs on Utah farms in 2018, a 29.1% year-over increase. Pork sales, however, decreased 28.3% from $173 million in 2017 to $124 million in 2018. Sheep and lambs totaled 275,000 in 2018, the same as 2017. There were 100,000 milk cows in 2018 compared with 97,000 milk cows in 2017, a 3.1% increase. The compensation price for milk decreased over the same period from $17.70/cwt to $16.10/cwt, a 9.0% decrease.

Livestock, livestock products, and poultry sales decreased 7.7% from $1.3 billion in 2017 to $1.2 billion in 2018. Total crop sales, however, grew from $414 million in 2017 to $486 million in 2018, a 17.4% increase.

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

1 U.S. Bureau of Economic Analysis.
2 *2019 Utah Agriculture Statistics* and *Utah Department of Agriculture and Food Annual Report*.
3 ibid.

Significant Issues

Animal agriculture is the foundation of Utah agriculture. Ranching operations require a combination of private and public lands to be sustainable and economically viable. Ranchers face tremendous uncertainty with 67% of Utah lands under federal control.

Predation, led by coyotes, continues to be a problem for sheep, cattle, and poultry producers, especially on or near public lands. Predator control funding comes from state and federal sources, as well as from ranchers who pay a per-head assessment. The focus of the program is to protect livestock, primarily adult sheep, lambs, and calves, from predators, including coyotes, cougars, bears, and ravens. In 2018, 20,300 sheep were lost solely to coyotes, up 25% from 2017. In addition, during that same year, 8,000 sheep were lost from cougars and bears, up 14% from 2017.

Agriculture Sustainability

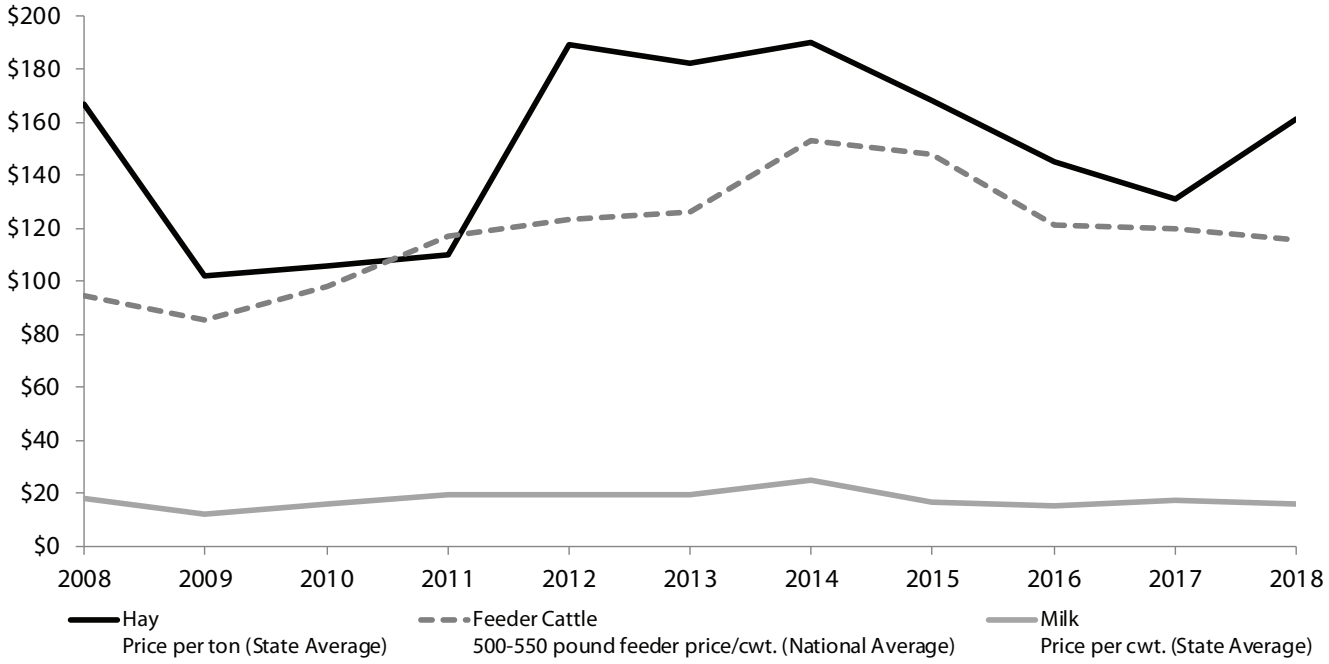
Each Utah farm or ranch is different. Usually, we think of ranchers on horseback surrounded by their animals or a farmer in a large field with a tractor. These types of farms still account for the majority of agricultural products in Utah. However, urban farms are also adding to our local food supply.

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

2020 OUTLOOK

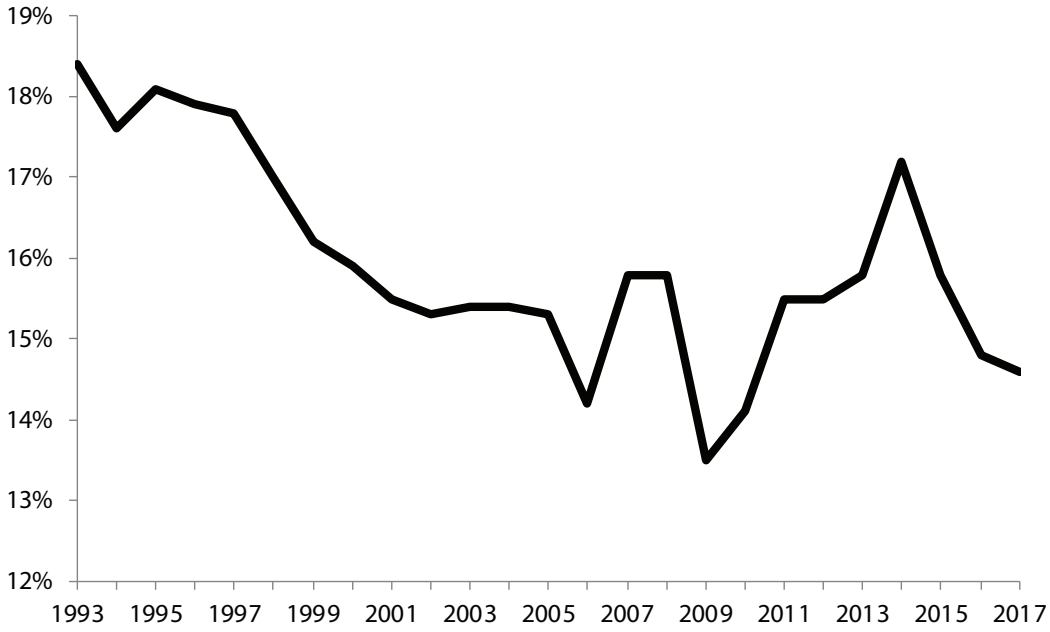
Agriculture production and processing play a role in Utah's diverse economy. Developing countries, expanding global markets, and changing consumer food purchasing behaviors keep Utah's production agriculture industry changing and in demand. Continued drought conditions, increased catastrophic wildfires, prolonged tariffs, and federal land management policies create uncertainty and limit the potential for greater economic contributions by Utah agriculture, especially for rural communities.

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



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

Figure 14.2: Farmers' Share of Food Spending



Source: U.S. Department of Agriculture

Real Estate and Residential Construction 15

James A. Wood, Kem C. Gardner Policy Institute

2019 OVERVIEW

In 2019, the value of permit-authorized construction in Utah was $9.46 billion, the highest year ever, in both current and inflation-adjusted dollars. The previous peak was in 2006, during the run-up to the Great Recession, when construction value totaled $9.45 billion in inflation-adjusted dollars. Construction value includes the value of permit-authorized residential and nonresidential construction as well as the construction value of additions, alterations, and repairs to existing structures. Permit-authorized construction does not include most public construction, such as roads, highway, prisons, and schools.

Residential Construction

Sixty percent of the $9.46 billion in total construction value in 2019 was for residential construction activity. The value of residential construction in 2019 was $5.70 billion, 10.9% higher than the previous year. The strong growth in value reflects the 11.0% increase in residential permits issued for new units. The number of residential permits issued in 2019 was 26,900 compared to 24,245 in 2018.

The boom in multifamily (apartments, condominiums, and townhomes) construction drove the 2019 increase in residential construction. The number of multifamily units receiving permits was up by 33.0%, and for only the second time in recent years multifamily permits exceeded single-family permits. Multifamily permits totaled 15,200, accounting for 57.0% of all residential permits. The number of multifamily units increased from 10,926 in 2018 to 15,200 in 2019, a remarkable increase of 39.0%.

The strong performance of the multifamily sector in 2019 was driven primarily by apartment construction. Since 2014, nearly 37,000 permits have been issued for apartment units statewide. In 2019, the number of permits issued for apartment units increased to 9,600 permits, an 85.0% increase over 2018. Permit activity for apartments was the at highest level in 35 years.

In contrast to the multifamily sector, single-family permits declined by 10.0% in 2019, falling from 12,776 units to 11,500 units. Forecasters expected a slight decline in single-family construction in 2019 due to an anticipated increase in interest rates from 4.0% to 5.0%; instead, rates dropped below 4.0% during the second half of the year. Lower rates should have spurred higher levels of single-family activity, rather than the surprising decline. Despite more favorable interest rates, the single-family market is hampered by high prices, which either prevent or discourage many households from entering the market. According to Metrostudy, the median sales price of a new, detached, single-family home in the Wasatch Front counties was $405,000 in 2019—a 60.0%increase since 2012.

The higher level of residential construction in the past two years has helped ease Utah's housing shortage. Unlike the period from 2010 to 2017, when the increase in households outnumbered new housing units, the two most recent years have seen the growth in housing units exceed the growth in households. This better balance between supply and demand will relieve future price pressure on the housing market.

2020 OUTLOOK

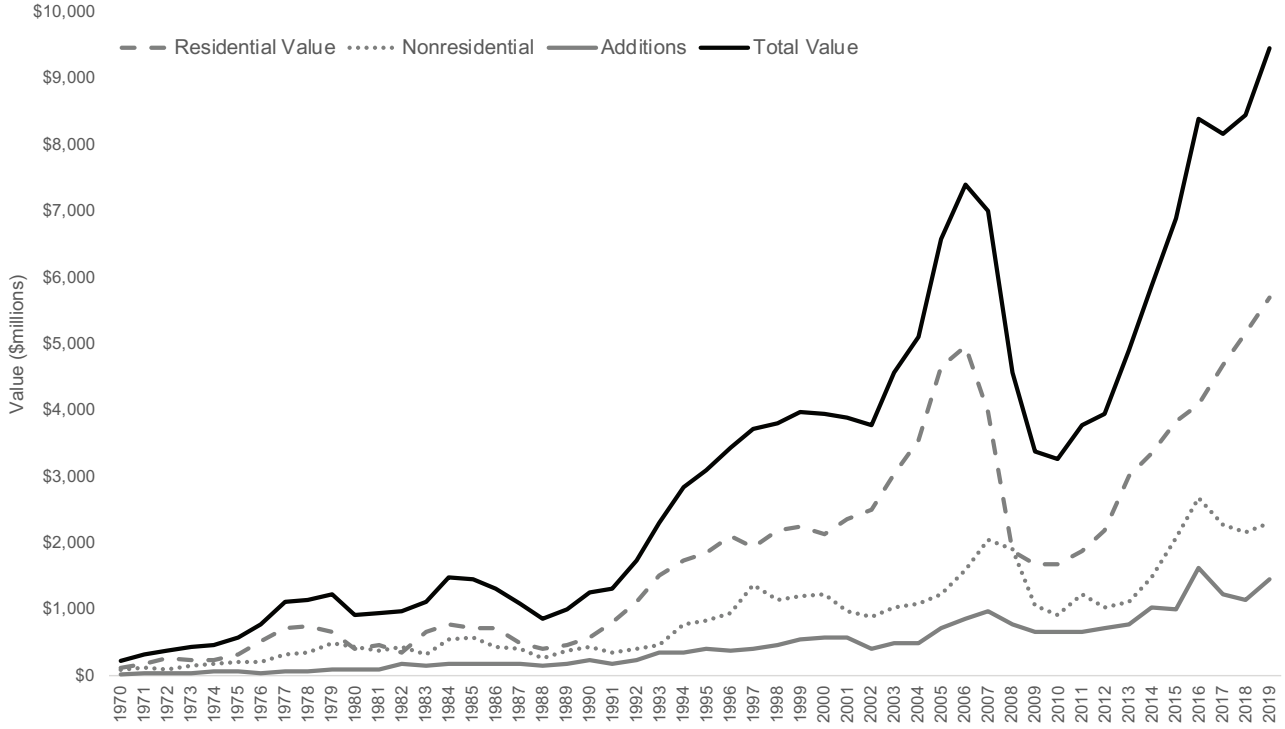
The value of permit-authorized construction in Utah in 2020 is forecast at $9.06 billion, a decline of 5.0% from 2019. The number of residential units is forecast at 26,000 units, down slightly from the 26,908 in 2019. The decline is due to an expected slowdown in multifamily permit activity. The value of residential construction will hold steady at around $5.80 billion while the value of nonresidential construction and additions, alterations, and repairs will likely see modest declines. Nonresidential construction value is forecast at $2.06 billion, a drop of $300.0 million from 2019. Additions, alterations, and repairs value is forecast at $1.20 billion, a decline of $200.0 million. Despite the declines in nonresidential construction and additions, alterations, and repairs, the value of permit-authorized construction in 2020 will likely be the second-highest year on record.

Figure 15.1: Utah Residential Construction Activity

Note: e=estimate

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

Figure 15.2: Value of Permit Authorized Construction in Utah



Note: e=estimate

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

Table 15.1: Residential and Nonresidential Construction Activity

Year	Single-Family Units	Multi-Family Units	Mobile Homes/ Cabins	Total Units	Value (nominal millions)			
					Residential	Nonresidential	Add., Alt., and Repairs	Total
1970	5,962	3,108	na	9,070	$117.0	$87.3	$18.0	$222.3
1971	6,768	6,009	na	12,777	176.8	121.6	23.9	322.3
1972	8,807	8,513	na	17,320	256.5	99.0	31.8	387.3
1973	7,546	5,904	na	13,450	240.9	150.3	36.3	427.5
1974	8,284	3,217	na	11,501	237.9	174.2	52.3	464.4
1975	10,912	2,800	na	13,712	330.6	196.5	50.0	577.1
1976	13,546	5,075	na	18,621	507.0	216.8	49.4	773.2
1977	17,424	5,856	na	23,280	728.0	327.1	61.7	1,116.8
1978	15,618	5,646	na	21,264	734.0	338.6	70.8	1,143.4
1979	12,570	4,179	na	16,749	645.8	490.3	96.0	1,232.1
1980	7,760	3,141	na	10,901	408.3	430.0	83.7	922.0
1981	5,413	3,840	na	9,253	451.5	378.2	101.6	931.3
1982	4,767	2,904	na	7,671	347.6	440.1	175.7	963.4
1983	8,806	5,858	na	14,664	657.8	321.0	136.3	1,115.1
1984	7,496	11,327	na	18,823	786.7	535.2	172.9	1,494.8
1985	7,403	7,844	na	15,247	706.2	567.7	167.6	1,441.5
1986	8,512	4,932	na	13,444	715.5	439.9	164.1	1,319.5
1987	6,530	755	na	7,285	495.2	413.4	166.4	1,075.0
1988	5,297	418	na	5,715	413.0	272.1	161.5	846.6
1989	5,197	453	na	5,650	447.8	389.6	171.1	1,008.5
1990	6,099	910	na	7,009	579.4	422.9	243.4	1,245.7
1991	7,911	958	572	9,441	791.0	342.6	186.9	1,320.5
1992	10,375	1,722	904	13,001	1,113.6	396.9	234.8	1,745.3
1993	12,929	3,865	1,010	17,804	1,504.4	463.7	337.3	2,305.4
1994	13,947	4,646	1,154	19,747	1,730.1	772.2	341.9	2,844.2
1995	13,904	6,425	1,229	21,558	1,854.6	832.7	409.0	3,096.3
1996	15,139	7,190	1,408	23,737	2,104.5	951.8	386.3	3,442.6
1997	14,079	5,265	1,343	20,687	1,943.5	1,370.9	407.1	3,721.5
1998	14,476	5,762	1,505	21,743	2,188.7	1,148.4	461.3	3,798.4
1999	14,561	4,443	1,346	20,350	2,238.0	1,195.0	537.0	3,970.0
2000	13,463	3,629	1,062	18,154	2,140.1	1,213.0	583.3	3,936.4
2001	13,851	5,089	735	19,675	2,352.7	969.8	562.8	3,885.3
2002	14,466	4,149	926	19,541	2,491.0	897.2	393.0	3,781.2
2003	16,515	5,555	766	22,836	3,046.4	1,017.5	497.0	4,560.9
2004	17,724	5,853	716	24,293	3,552.6	1,089.9	476.0	5,118.5
2005	20,912	6,562	811	28,285	4,662.6	1,217.8	707.6	6,588.0
2006	19,888	5,658	776	26,322	4,955.5	1,588.4	865.3	7,409.2
2007	13,510	6,290	739	20,539	3,963.2	2,051.4	979.7	6,994.3
2008	5,513	4,544	546	10,603	1,877.0	1,919.1	781.2	4,577.3
2009	5,217	4,951	320	10,488	1,674.0	1,056.1	660.1	3,390.2
2010	5,936	2,890	240	9,066	1,667.0	925.1	672.0	3,264.1
2011	5,391	3,518	176	9,085	1,769.7	1,456.5	846.4	4,072.5
2012	7,655	4,108	156	11,919	2,205.0	1,020.2	728.9	3,954.0
2013	9,858	5,008	143	15,009	3,087.1	1,106.0	785.1	4,978.2
2014	8,715	9,864	231	18,810	3,390.4	1,475.9	1,034.5	5,900.8
2015	9,940	7,143	211	17,294	3,819.2	2,076.5	1,006.4	6,902.1
2016	10,692	9,170	202	20,064	4,082.0	2,680.1	1,624.2	8,386.2
2017	12,146	10,530	326	23,002	4,696.1	2,280.6	1,214.6	8,191.3
2018	12,947	11,059	239	24,245	5,153.0	2,166.5	1,136.0	8,455.5
2019e	12,600	14,000	308	26,908	5,700.0	2,300.0	1,460.0	9,460.0
2020f	12,000	13,700	300	26,000	5,800.0	2,058.5	1,200.0	9,058.5

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

Table 15.2: Average Rates for 30-Year Mortgages

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

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

Year	Mortgage Rate
2004	5.84%
2005	5.87%
2006	6.40%
2007	6.38%
2008	6.10%
2009	5.04%
2010	4.69%
2011	4.45%
2012	3.66%
2013	3.98%
2014	4.17%
2015	3.85%
2016	3.65%
2017	3.99%
2018	4.54%
2019*	3.95%

Note: *through November
Source: Freddie Mac

Table 15.3: Housing Price Index for Utah

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

Year	Index	Year-Over Change
2006	283.8	16.8%
2007	318.1	12.1%
2008	303.0	-4.7%
2009	270.9	-10.6%
2010	255.1	-5.9%
2011	239.6	-6.1%
2012	256.3	7.0%
2013	282.9	10.4%
2014	296.6	4.8%
2015	315.8	6.5%
2016	343.0	8.6%
2017	370.1	8.0%
2018	408.3	10.2%
2019	435.2	6.6%

Note: Four-quarter average; 2019 is three-quarter average. Not seasonally adjusted; purchase only.
Source: Federal Housing Finance Agency

Nonresidential Construction

16

Dejan Eskic, Kem C. Gardner Policy Institute

2019 OVERVIEW

The value of Utah's 2019 permit-authorized nonresidential construction was an estimated $2.3 billion, the second highest year ever in current dollars and fourth highest year in inflation-adjusted dollars. Nonresidential construction peaked in 2016 due to major hospital projects as well as a strong year in both retail and non-building structure construction. In 2019, permit-authorized nonresidential construction value was led by industrial-warehouse-manufacturing construction and office-bank-professional construction, respectively. The industrial construction sector had a record year in 2019 with a 34.9% year-over-year construction value increase. Two-thirds of all nonresidential construction took place in Salt Lake and Utah counties. However, many counties outside of the Wasatch Front experienced increases in com–mercial construction activity, and benefited from large-scale commercial and infrastructure projects.

Office, Bank, Professional Construction

After a record-setting 2018, with nearly $630.0 million in permitted construction value, the office sector had another strong year. The office sector permitted nearly $503.0 million in 2019, making it the third highest year on record (inflation-adjusted). Salt Lake County led this year's office construction activity, accounting for nearly 70.0% of Utah's total permitted-construction value. The growth is led by Utah's expanding employment, especially in the tech, and professional and business services sectors.

Retail, Mercantile, Restaurant Construction

The retail sector has experienced a mixed recovery since the last recession. While 2016 was the fourth highest year on record (inflation-adjusted), this decade's average construction value is 30% less than the previous decade. The 2019 permitted construction value was estimated to be just shy of $150.0 million. The sector continues to evolve as some national retailers close their doors, leaving more space vacant, thus limiting the need for new construction activity.

Industrial, Warehouse, Manufacturing Construction

The industrial sector had a record year ($612.6 million), and the largest absolute year-over-year increase in permitted nonresidential construction value. Warehouse growth continues to drive the industrial sector as major national tenants locate their distribution and storage spaces in Utah.

Structures Other Than Buildings

This sector's 2019 permitted construction value was estimated at $285.7 million, the third highest year on record (inflation-adjusted). A $95.0 million permit for a solar farm outside of Milford, Utah, led this sector.

Remaining Nonresidential Buildings

Twelve individual building types constitute this sector; together, they accounted for $749.2 million in 2019 permitted construction activity, ranking as the eighth highest year on record (inflation-adjusted). While down from the 2016 peak of $1.3 billion in construction value, 2019 saw major projects across the state, including public utility projects, amusement and recreation development, and parking structures.

2020 OUTLOOK

The 2020 forecast for the value of permit-authorized nonresidential construction in Utah is $2.06 billion, a 10.5% decrease from 2019. It is important to note that this decrease is reflective of record construction activity in the previous two years. The decrease from $2.30 billion in 2019 to $2.06 billion in 2020 is still above average; the annual average activity level since 2000 is $1.8 billion (inflation-adjusted).

The 2020 value of permit-authorized nonresidential construction is forecasted to decline by 5.0% in the office-bank-professional sector; decline by 23.8% in the retail-mercantile-restaurant sector; and decline by 10.7% in the industrial-warehouse-manufacturing sector.

While this slowing is anticipated, permit-authorized nonresidential construction is also expected to continue at high activity levels due to Utah's strong job market and expanding population.

Table 16.1: Nonresidential Construction Activity

Year	Value of Office/Bank/ Professional Construction (millions)	Value of Retail/Mercantile/ Restaurant Construction (millions)	Value of Industrial/Warehouse/ Manufacturing Construction (millions)	Value of Structures Other Than Buildings Construction* (millions)	Value of Remaining Nonres. Buildings Construction** (millions)	Total Value of Nonresidential Construction (millions)
2000	$212.5	$192.2	$191.0	$44.4	$572.8	$1,213.0
2001	$166.7	$182.2	$133.1	$39.2	$448.7	$969.8
2002	$184.2	$144.2	$85.0	$47.4	$436.3	$897.2
2003	$110.9	$205.6	$165.3	$32.8	$503.0	$1,017.5
2004	$145.7	$212.7	$133.6	$62.8	$535.2	$1,089.9
2005	$218.9	$164.6	$228.9	$58.7	$546.7	$1,217.8
2006	$299.5	$284.2	$295.2	$75.4	$634.2	$1,588.4
2007	$399.8	$267.9	$434.8	$164.2	$784.8	$2,051.4
2008	$249.8	$358.1	$449.0	$102.4	$759.8	$1,919.1
2009	$104.6	$123.6	$356.0	$43.5	$428.4	$1,056.1
2010	$127.1	$94.2	$127.4	$67.7	$508.8	$925.1
2011	$414.2	$104.6	$324.8	$63.6	$549.3	$1,456.5
2012	$114.0	$133.7	$235.3	$54.1	$483.2	$1,020.2
2013	$214.9	$145.3	$176.8	$46.3	$522.6	$1,106.0
2014	$354.5	$194.5	$270.3	$71.7	$584.9	$1,475.9
2015	$442.0	$155.7	$502.4	$330.6	$645.9	$2,076.5
2016	$380.7	$279.1	$289.1	$413.4	$1,317.8	$2,680.1
2017	$489.1	$224.8	$405.9	$264.5	$896.3	$2,280.6
2018	$629.1	$152.5	$454.2	$188.0	$742.7	$2,166.5
2019e	$502.7	$149.8	$612.6	$285.7	$749.2	$2,300.0
2020f	$477.6	$114.1	$547.1	$148.2	$771.5	$2,058.5

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

Energy

17

Michael Vanden Berg, Utah Geological Survey

2019 OVERVIEW

Utah's energy landscape continues to evolve as the balance between fossil fuels and renewable energy changes—some related to worldwide trends, whereas others are more specific to Utah and the western United States. The most noteworthy trends include: 1) the weakening of crude oil prices plus operator turnover in the Uinta Basin has led to reduced drilling activity resulting in a plateau in Utah's crude oil production; 2) low natural gas prices have resulted in the continued erosion of Utah's natural gas production; 3) the exponential growth in residential rooftop solar capacity plus energy efficiency measures have changed Utah's electricity demand growth; and 4) increases in renewable and natural gas-generated electricity have led to a reduction in Utah's coal-fired power generation.

After significant volatility in Utah's crude oil price between 2014 and 2016—with swings from a high of $100 per barrel to a low of $20 per barrel—prices have now stabilized in a range between the low $40s and high $50s, averaging $48 per barrel in 2019. After two years of steady increase (2016 to 2018), crude oil production in Utah is expected to plateau in 2019 at about 36.9 million barrels. Natural gas prices have remained low for the past five years due to oversupply from the country's prolific shale reservoirs. As a result, drilling for natural gas in Utah has virtually stopped and production has declined by 45% since the 2012 peak.

Between 2015 and 2017, 855 megawatts (MW) of new utility-scale solar capacity came online in Utah—more capacity than wind, hydroelectric, geothermal, and biomass combined. This surge in solar also occurred in the residential sector; the total installed residential PV capacity in Utah has increased from just 6 MW in 2013 to more than 212 MW in 2018.

Coal production in Utah rebounded to 15.3 million tons in 2019 as the foreign export market continued to grow, offsetting lower demand at regional power plants and industrial facilities. Production of electricity in Utah has decreased 15% in the past 10 years, mostly from coal-fired power plants, while natural gas-fired power plants and renewable resources have greatly increased their share of total generation.

Consumption of petroleum products is expected to reach record levels in 2019 as prices remain relatively low, and consumption of natural gas is expected to increase to record highs. Electricity consumption has grown at a modest 0.3% per year for the past six years in contrast to the historical 3–4% annual growth rate. This reduction in growth is partially attributed to the increase in rooftop solar installations, which offsets electric demand from power plants, but more significant is an increase in implementation of energy efficiency measures. Utah will continue to be a net-exporter of energy by producing more natural gas, coal, and electricity than is used in state. However, Utah will remain reliant on other states and Canada to satisfy its demand for crude oil and petroleum products.

Petroleum

Production. From 2003 to 2014, crude oil production in Utah experienced a substantial resurgence 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 as well as the advancement of horizontal drilling. Crude oil production reached 40.9 million barrels in 2014, over triple the production achieved in 2003. Following a large decline in the price of crude oil, production dropped 9.2% in 2015 to 37.1 million barrels and dropped an additional 18% in 2016 to 30.5 million barrels. As prices increased in the past few years, crude oil production followed, reaching 34.4 million barrels in 2017 and 37.1 million barrels in 2018. However, production is expected to plateau in 2019 at about 36.9 million barrels as prices fall again, but also because several major Uinta Basin operators sold their acreage in 2019 (as acreage goes up for sale, operators typically suspend drilling, and after a new company takes over, there is usually a delay in re-activating laid down drilling rigs). Total

crude oil pipeline imports from Colorado, Wyoming, and Canada increased to 39.5 million barrels in 2019, as refineries increased capacity and Utah production rates slowed. Refinery receipts—the amount of crude oil delivered to Utah's five refineries—increased to 70.0 million barrels as additional refinery capacity came online in early 2019. Estimated exports of Utah crude oil peaked in 2014 at 15 million barrels coinciding with a peak in production. After dropping to 4 million barrels in 2017 due to lower production rates and high refinery receipts, exports increased to over 8.5 million barrels in 2018 and are expected to total 6.4 million barrels in 2019. Exports are aided by an increasing amount of Uinta Basin crude oil leaving the state via train from rail terminals in Price, Utah.

Prices and Value. Following worldwide trends, Utah's crude oil price began to decline in late 2014 (from about $85 per barrel) and continued to decline through much of 2015 (down to a low of about $28 per barrel), and averaged $37 in 2016, a price not seen since 2003. Prices steadily increased through 2017 and into early 2018, stabilizing near $60 a barrel for most of the year, but began to decline again in late 2018 (down to about $43 a barrel), resulting in an average price for 2018 of $57 per barrel. Prices rebounded slightly in mid-2019 (to about $54) but have since retreated to the mid- to upper $40s and are estimated to average $48 per barrel for the year. The overall decrease in price, coupled with a resultant slowing of production, pushed the value of Utah's produced crude oil down to $1.8 billion in 2019, down 16% from 2018. Following suit, Utah's average price for regular unleaded motor gasoline and diesel also decreased in 2019 to $2.73 and $3.03 per gallon, respectively.

Consumption. Utah's refined petroleum production decreased to 75.5 million barrels in 2018—a fire at the Holly refinery significantly reduced its capacity for several months. With a return to full capacity at Holly and a 2% increase in overall refinery capacity, total refined product production increased to a new record of 79.7 million barrels in 2019. Refined petroleum product imports from Wyoming via the Pioneer pipeline increased slightly to 16.2 million barrels in 2019, and Utah refineries were able to export 32.8 million barrels of petroleum products via pipeline to other states. As demand increases due to an ever-expanding economy and increased population, Utah's total petroleum product consumption is estimated to increase to a new high of 58.9 million barrels in 2019 (the third straight record high year), the largest share of which is motor gasoline (51%) followed by diesel fuel (25%).

Natural Gas

Production. Utah's natural gas production peaked in 2012 at 491 billion cubic feet (Bcf) but has since retreated to 271 Bcf in 2019, the lowest in the past 16 years, as prices remain soft. Dry production and actual natural gas sales also decreased to 262 and 236 Bcf, respectively. Similarly, natural gas liquids production decreased to about 3.8 million barrels. Nearly all of Utah's natural gas production comes from conventional reservoirs; only a few unconventional shale gas exploratory wells have been drilled, all before the price declined in 2015. With the current low price of natural gas, drilling rigs in Utah are focused solely on liquid-rich plays—there has been no significant drilling specifically for natural gas since 2015.

Prices and Value. The average wellhead price for natural gas in Utah decreased 49% between 2014 and 2016 ($4.35 per thousand cubic feet [Mcf] to $2.24 per Mcf) but rebounded by 21% to $2.72 per Mcf in 2017 and increased again in 2018 to $2.77, before retreating to $2.60 in 2019. Unfortunately, natural gas prices in the $2 per Mcf range do not provide economic justification for new natural gas exploration or development. Following this same trend, the residential natural gas price also decreased nearly 12% to $8.00 per Mcf. The lower overall production of both natural gas and natural gas liquids, coupled with the steady low prices, resulted in a 2019 value of natural gas production of $784 million, the lowest since 2002.

Consumption. Natural gas consumption in Utah has been volatile over the past few years mostly due to large swings in the electric utility market. Overall consumption increased by 4.4% in 2019 reaching 255 Bcf, a new record high, and includes a significant 8% increase in consumption at Utah's natural gas power plants. In contrast, consumption from the residential, commercial, and industrial sectors only increased by 3–5% each. As production has declined over recent years, Utah now consumes about 94% of in-state production, compared with consuming only 46% of in-state production in 2012.

Coal

Production. Utah coal production is expected to increase by a significant 11.2% in 2019 to 15.3 million short tons—due to a resurgence in the overseas export market—but still be well below the 24.5 million tons averaged in the 2000s. Declining Utah coal production started during the 2008 recession, but demand has not rebounded like other energy commodities since coal has dropped out of favor as a fuel for electric and industrial needs. Production at the three Wolverine mines—Skyline, Dugout, and Sufco—increased about 500,000 tons in 2019 and accounted for 63% of Utah's total coal production. The Murray-owned West Ridge mine shut down in late 2015 and the longwall mining machine was shifted to the Lila Canyon mine, which has since ramped up production to 3.6 million tons. The Deer Creek mine closed in early 2015, whereas the nearby Castle Valley mine has kept steady production of about 1.0 million tons per year. The Coal Hollow mine in southern Utah will produce roughly 300,000 tons in 2019 from their surface mine. Bronco Energy recently re-opened the Emery mine, cutting new portals in spring 2017, and produced about 400,000 tons in 2018 and about 700,000 tons in 2019, with possibilities to produce more if customers can be found.

Prices and Value. The average mine-mouth price for Utah coal has stabilized near $35 per short ton for the past several years (estimated at $35.50 per ton in 2019), still a relatively high price in nominal dollars but well below the inflation-adjusted high of $101 per ton reached in 1976. The end-use price of coal at Utah electric utilities, which includes transportation costs, decreased slightly to $41 per ton in 2019. The value of coal produced in Utah totaled $543 million in 2019, 9% higher than 2018, but well below the inflation-adjusted high of $1.3 billion recorded in 1982.

Consumption. Approximately 12.5 million short tons of coal was consumed in Utah in 2019, 97% of which was burned at electric utilities. Demand for coal in Utah has remained steady in recent years after a dramatic 17% decline between 2015 and 2016. Coke consumption in Utah ended in 2002 when Geneva Steel went out of business, and coal sales for industrial use (mostly cement and lime companies) has dropped to roughly 350,000 tons per year, which is only a quarter of peak demand of 1.4 million tons reached in 2005. In the past, Utah was a significant net exporter of coal, but out-of-state domestic demand has dropped from a high of 16 million tons in 2001 down to only about 2.2 million tons in 2019. Utah's foreign exports peaked in the mid-1990s at about 5 million tons, then dropped to near zero in the mid-2000s. However, the foreign export market has seen a resurgence in the past few years, increasing to an estimated 4 million tons in 2019.

Electricity (Including Renewable Resources)

Production. Electricity generation in Utah increased 0.7% to 39,600 gigawatthours (GWh) in 2019 but still remains 15% below the peak generation reached in 2008. This large reduction over the past 10 years is the result of several factors including recession-related decreases in demand, increased energy efficiency measures, an exponential increase in residential rooftop solar (which is not captured in the utility-scale generation numbers), and a reduction in demand for coal-fired generation from out-of-state users, particularly California. Coal-fired electric generation once dominated Utah's electric portfolio, providing 94% of electric generation in 2005. In 2019, coal accounted for only 64% of electric generation; significant increases in natural gas generation (23%) and renewable sources (12%) have broadened Utah's generation portfolio. The largest change in Utah's electricity sector is the recent exponential increase in utility-scale PV solar capacity. Between mid-2015 and the end of 2016, 855 MW of new utility-scale solar capacity came online, more than wind, hydroelectric, geothermal, and biomass combined. Solar now accounts for 5.7% of Utah's total electric generation, and several additional solar farms are slated for construction in 2020. In contrast, Utah's fleet of coal-fired power plants has experienced a 25% reduction in net generation, most significantly from the Intermountain Power Plant (reduction of 36%), Huntington (reduction of 18%), Hunter (reduction of 11%), and the closure of the Carbon plant.

Prices. The overall price of electricity in Utah has remained mostly steady over the past seven years. Utah's 2019 average electric rate of 8.3 cents per kilowatthour (kWh) for all sectors of the economy is about 22% lower than the national average of 10.6 cents. This lower rate is mostly attributed to Utah's established fleet of coal-fired power plants, which supply 64% of electricity generation in the state, and low natural gas prices. The residential price of Utah's electricity increased a modest 0.9% in 2019 to 10.5

cents per kWh, which is lower than the national average of 13.0 cents per kWh.

Consumption. In general, from 1980 to 2013, electricity consumption averaged a 3.3% increase annually, mirroring Utah's population rate increase (2.1% per year) combined with the increasing rate of consumption per capita (1.3% per year). However, after an initial 1.4% decrease from 2013 to 2014, total electricity consumption climbed more slowly to reach a new record high in 2018 of 31,242 GWh, before falling 2.2% in 2019 back to 30,550 GWh. The slow-down in electricity consumption is most likely related to the implementation of energy efficiency measures combined with a dramatic increase in residential rooftop solar (as stated earlier, rooftop solar electric generation and consumption reduces demand; the data are not captured within the consumption totals). Utah remains a net exporter of electricity, using only 77% of in-state electric generation.

2020 OUTLOOK

Production and Consumption. Utah began 2019 with eight rigs drilling for oil, but as prices remained in the upper $40 to low $50 range, this number dropped to only four rigs by the end of the year. Even though many of these new oil wells are long horizontals targeting the Uinta Basin's Green River Formation, and most have been very successful, four active rigs are not enough to keep Utah's oil production from plateauing near 37 million barrels. In addition, several major Uinta Basin operators sold their acreage in 2019, which resulted in reduced drilling rates. The hope is that the new companies will restart drilling in 2020, helping to stabilize or even slightly increase falling production. At the same time, demand for petroleum products in Utah will continue to increase to record levels as the economy remains strong and prices for motor gasoline remain below $3 per gallon. Looking to the future, plans have been proposed to build a railway into the Uinta Basin; the federal Surface Transportation Board recently started the needed National Environmental Policy Act (NEPA)/Environmental Impact Statement (EIS) process. If successful, the proposed railway could open new out-of-state markets for Utah's crude oil and could create significant potential for increased drilling rates.

In contrast to crude oil, no drilling for natural gas has taken place since early 2018, resulting in a continued decrease in gas production—2020 production could possibly hit a low not seen since the late 1980s. Consumption rates have fluctuated over the years due to the severity of the heating and cooling seasons, but despite reaching a record high in 2019, U.S. supply remains high and prices have stayed low. Several groups have sought new markets for Rocky Mountain natural gas to help alleviate the oversupply, including access to proposed liquefied natural gas (LNG) facilities in Oregon and Baja California, Mexico, to tap into Asian markets.

Coal production in Utah is expected to remain in the 14- to 15-million-ton per year range for the near future, as in-state demand has stabilized around 13 million tons a year, and out-of-state demand continues to be weak (about 2 million tons per year). Utah coal deliveries to the foreign export market have experienced a modest jump in the past few years, and potential remains for access to a strong overseas market which could push production higher in coming years. Similar to natural gas, West Coast port facilities are vital for accessing the Asian coal market, but current capacity at existing ports is limited and additional capacity could be a challenge to build.

Utah's electric generation portfolio continues to evolve as demand for carbon-neutral electricity increases and several new utility-scale solar farms are installed in 2020 and beyond. This intensified emphasis on renewable energy has spurred research and development into large-scale electric storage facilities (e.g., compressed air storage in salt domes near Delta, Utah), the generation of electricity from "renewable" natural gas sources (e.g., large-scale anaerobic digesters), the continued development of enhanced geothermal systems at the Frontier Observatory for Research into Geothermal Energy (FORGE) site in central Utah, and the production of carbon-neutral hydrogen (using excess renewable energy or stranded natural gas) for electricity generation or vehicle fuel. Consumption of electricity should only modestly increase in the next few years as more rooftop solar is installed (offsetting residential demand) and energy efficiency measures continue to offset demands from a growing population.

Prices. Questions still linger about whether crude oil prices will return to the highs seen in the early 2010s (about $80 per barrel), but most estimates indicate prices should remain in the $50–$60 range for the foreseeable future as worldwide supply continues to adjust to increased success in exploration. The price of natural gas has remained in the mid- to upper $2.00-per-Mcf range for the past five years (excluding brief price spikes to over $4–$5 per Mcf), and projections indicate the price will likely stay in the mid- to upper $2 range for several more years as supply greatly outpaces demand. Utah's mine-mouth coal price will remain relatively flat and is expected to average in the mid-$30-per-ton range in coming years. Despite recent changes, Utah's well-established coal-fired power plants (which still provide 64% of Utah's electricity generation), as well as an established fleet of natural-gas plants and nearly one gigawatt of new solar capacity, will assure affordable, reliable electric power for the foreseeable future and help keep Utah's electricity prices nearly 20% below the national average.

Figure 17.1: Utah's Crude Oil Production, Pipeline Imports, Refinery Receipts, and Wellhead Price, 1980-2019

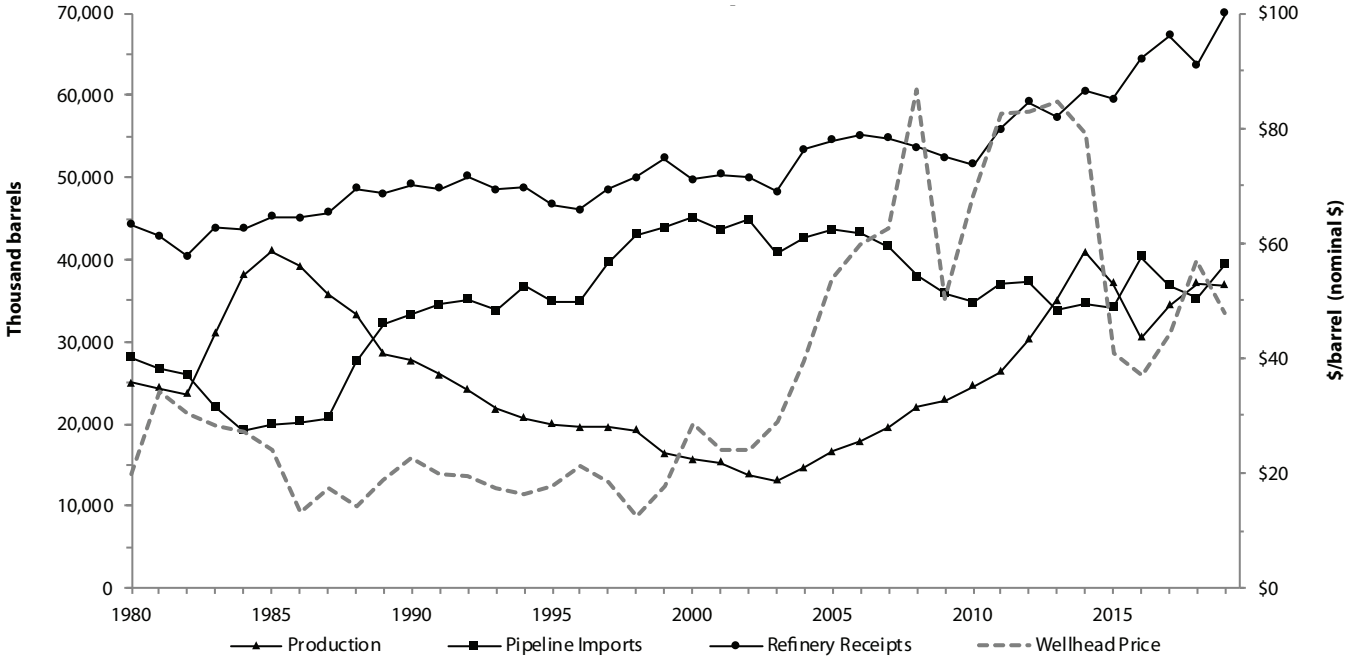


Figure 17.2: Utah's Petroleum Product Production, Consumption, Motor Gasoline, and Diesel Prices, 1980-2019

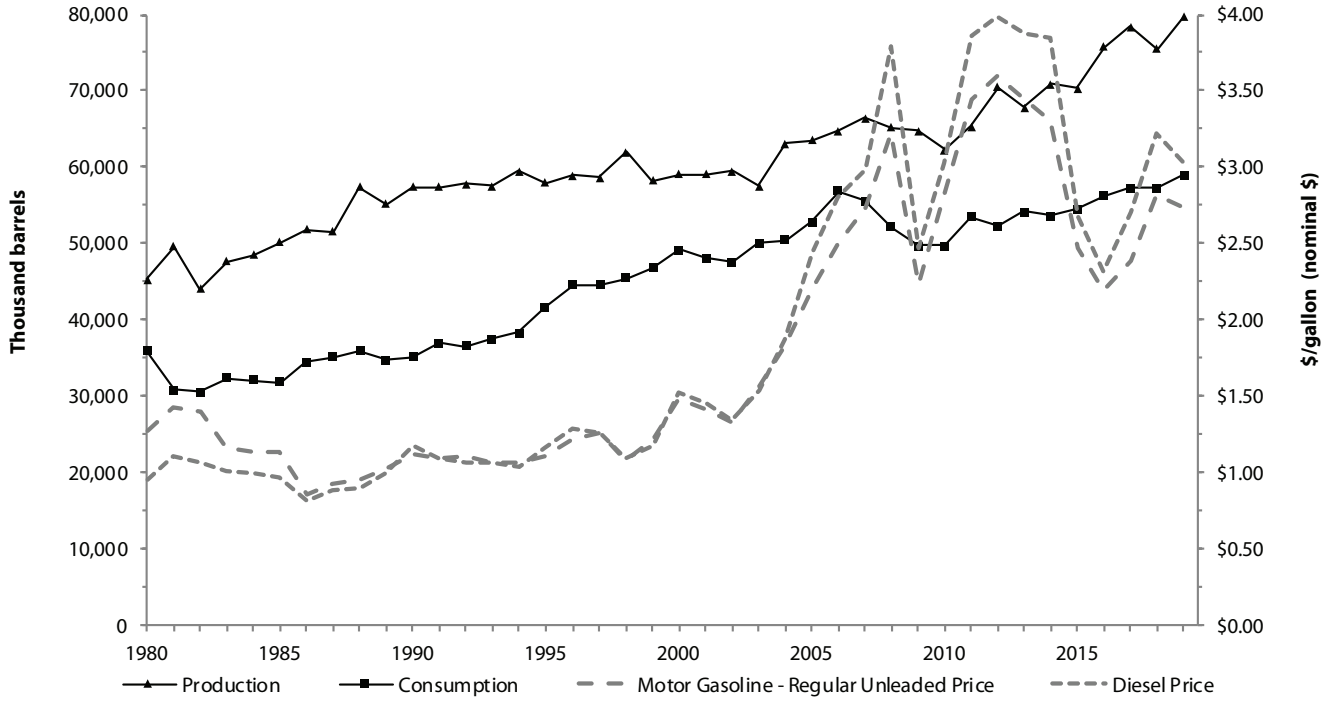


Figure 17.3: Natural Gas Production, Consumption, Wellhead, and Residential Prices, 1980-2019

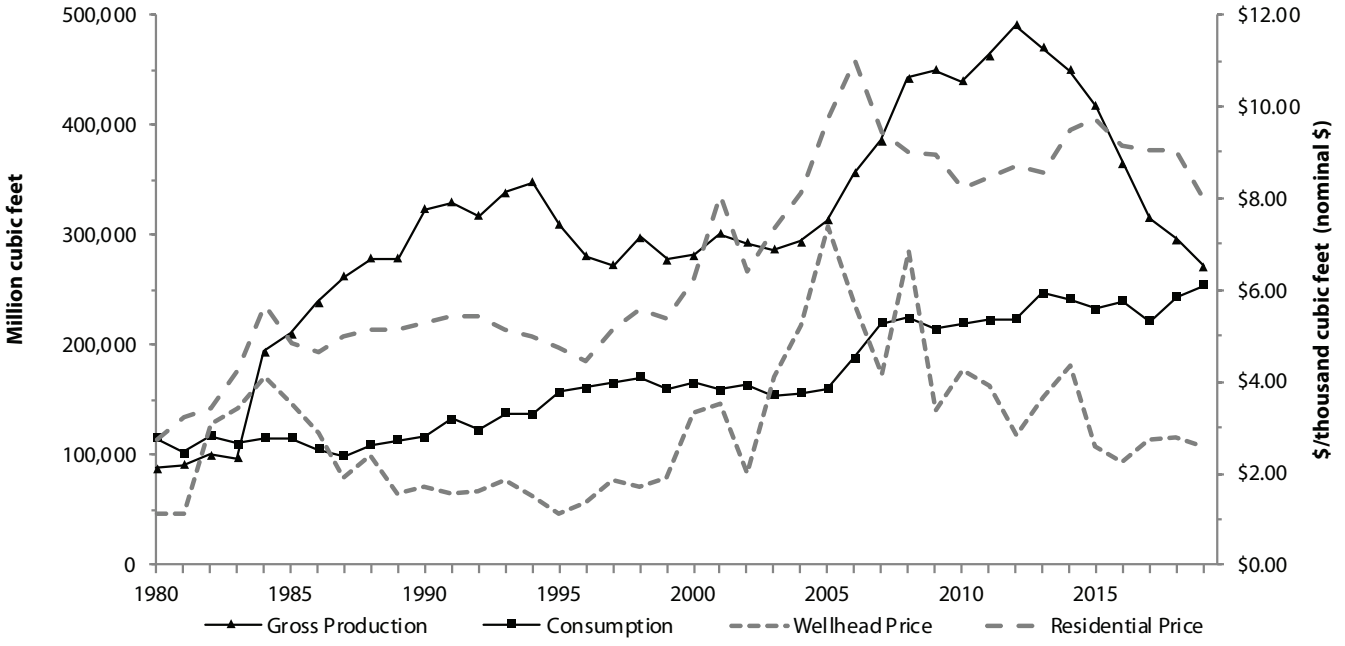


Figure 17.4: Utah's Coal Production, Consumption, Exports, and Mine-Mouth Price, 1980-2019

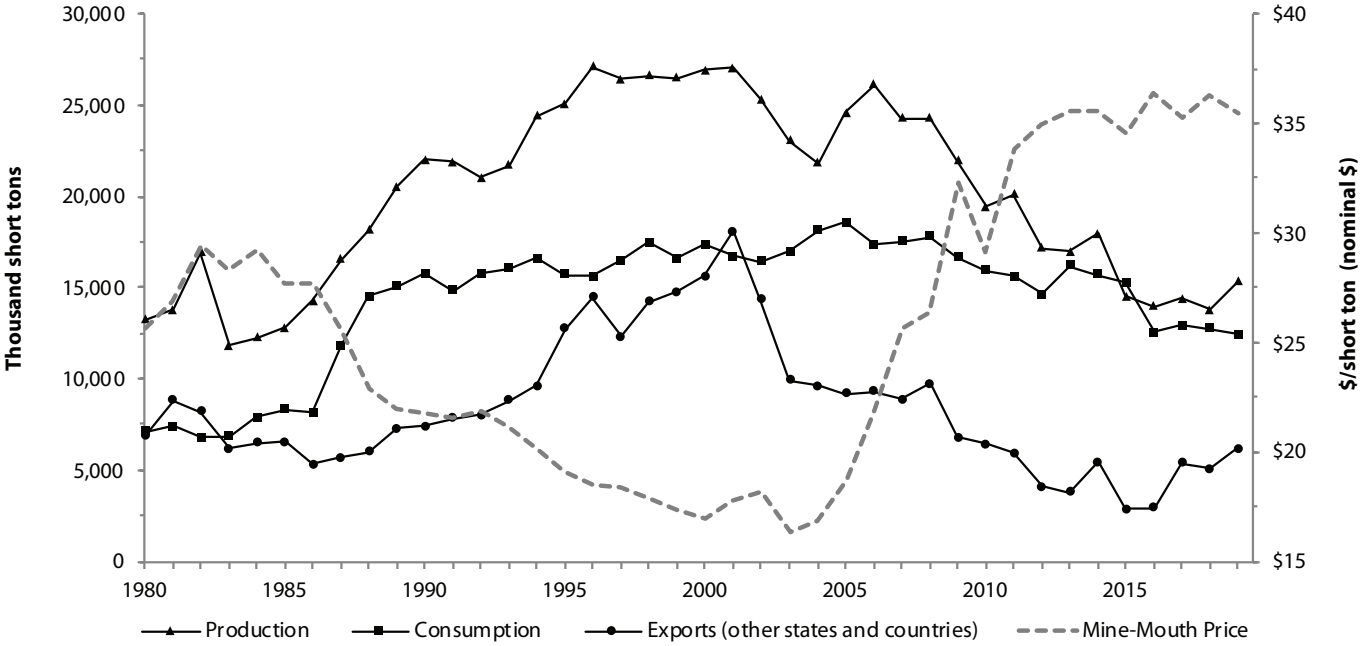


Figure 17.5: Utah's Electricity Net Generation, Consumption, and End-Use Residential Price, 1980-2019

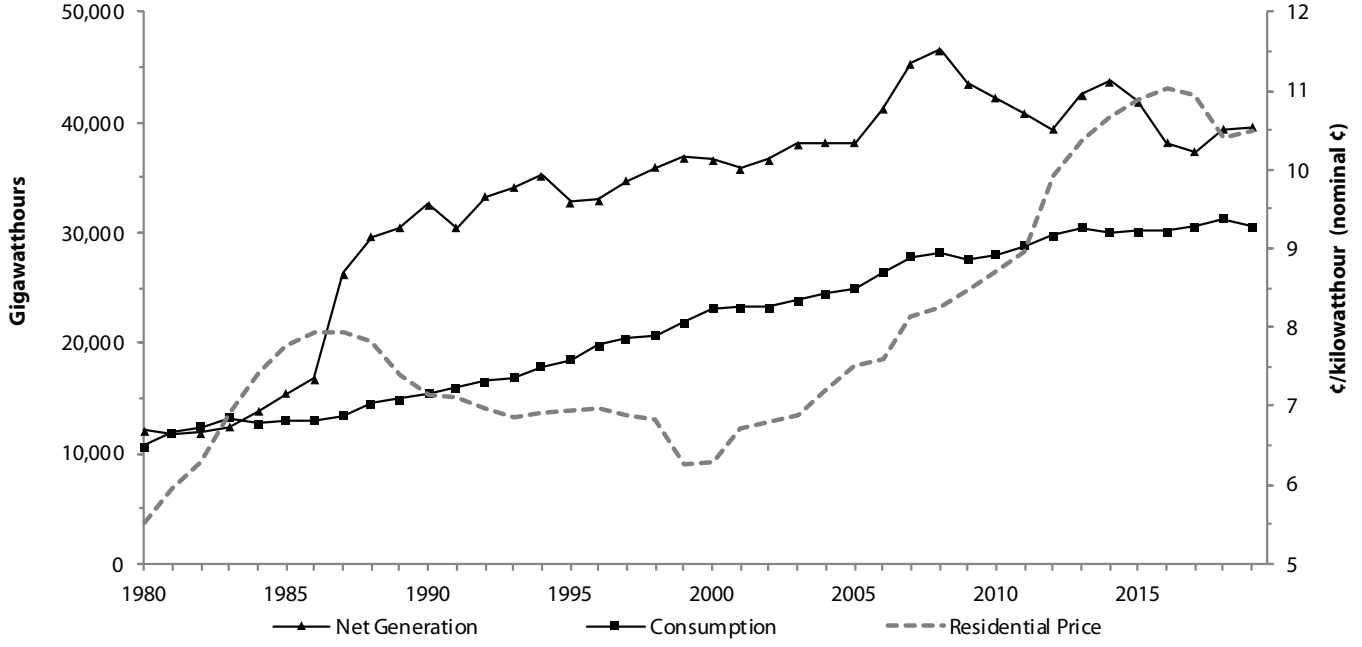


Table 17.1: Supply, Disposition, Price, and Value of Crude Oil in Utah

Year	Supply[1]				Disposition				Price	Value
	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
1981	24,309	14,931	11,724	0	8,088	42,876	43,007	762	$34.14	$830
1982	23,595	13,911	12,033	0	9,167	40,372	40,368	593	$30.50	$720
1983	31,045	14,696	7,283	0	9,123	43,901	43,844	632	$28.12	$873
1984	38,054	13,045	6,195	0	13,549	43,745	43,544	606	$27.21	$1,035
1985	41,080	13,107	6,827	0	15,790	45,224	45,357	695	$23.98	$985
1986	39,243	12,567	7,574	0	14,298	45,086	45,034	559	$13.33	$523
1987	35,829	13,246	7,454	0	10,875	45,654	45,668	613	$17.22	$617
1988	33,365	12,783	14,739	0	12,197	48,690	48,604	599	$14.24	$475
1989	28,504	13,861	18,380	0	12,756	47,989	47,948	626	$18.63	$531
1990	27,705	14,494	18,844	0	11,939	49,104	48,977	656	$22.61	$626
1991	25,928	14,423	20,113	0	11,817	48,647	48,852	749	$19.99	$518
1992	24,074	13,262	21,949	0	9,206	50,079	49,776	513	$19.39	$467
1993	21,826	11,575	22,279	0	7,126	48,554	48,307	645	$17.48	$382
1994	20,668	10,480	26,227	0	8,572	48,802	48,486	691	$16.38	$339
1995	19,976	9,929	24,923	60	8,246	46,641	46,634	806	$17.71	$354
1996	19,529	9,857	24,297	783	8,339	46,126	46,265	768	$21.10	$412
1997	19,593	8,565	28,162	2,858	10,686	48,492	48,477	633	$18.57	$364
1998	19,218	8,161	28,779	6,097	12,238	50,017	49,476	613	$12.52	$241
1999	16,362	7,335	28,461	8,067	7,953	52,271	50,556	704	$17.69	$289
2000	15,608	7,163	26,367	11,528	10,950	49,716	49,999	786	$28.53	$445
2001	15,271	7,208	25,100	11,364	8,633	50,310	50,143	457	$24.09	$368
2002	13,770	7,141	25,455	12,215	8,619	49,962	49,987	591	$23.87	$329
2003	13,096	6,964	24,152	9,690	5,635	48,267	48,284	547	$28.88	$378
2004	14,742	7,559	22,911	12,195	4,007	53,400	53,180	532	$39.35	$580
2005	16,675	8,214	24,372	10,991	5,739	54,513	54,544	767	$53.98	$900
2006	17,926	9,355	23,256	10,633	6,051	55,119	55,192	728	$59.70	$1,070
2007	19,534	10,708	22,012	8,769	6,258	54,764	54,952	662	$62.48	$1,220
2008	22,040	10,259	21,316	6,382	6,360	53,637	53,165	473	$86.58	$1,908
2009	22,941	7,409	23,000	5,520	6,395	52,475	52,479	519	$50.22	$1,152
2010	24,666	6,525	24,000	4,278	7,832	51,637	51,678	511	$68.09	$1,679
2011	26,276	6,997	26,050	3,894	7,318	55,900	55,656	473	$82.53	$2,169
2012	30,204	7,805	25,118	4,394	8,368	59,153	58,961	692	$82.73	$2,499
2013	35,002	7,601	23,124	3,111	11,493	57,345	56,921	669	$84.79	$2,968
2014	40,914	7,662	23,425	3,636	15,090	60,548	60,677	798	$79.04	$3,234
2015	37,136	7,048	22,211	4,963	11,809	59,549	59,568	660	$40.69	$1,511
2016	30,528	7,110	27,318	5,873	6,348	64,482	64,496	719	$36.92	$1,127
2017	34,438	5,763	26,187	4,967	4,043	67,311	67,526	826	$44.24	$1,524
2018	37,119	5,616	23,819	5,803	8,576	63,780	63,805	730	$57.09	$2,119
2019e	36,900	5,300	26,000	8,200	6,400	70,000	69,500	821	$48.00	$1,771

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; all crude oil imports are assumed to be accounted for.
Note: Prices and values are in nominal dollars.
Source: Utah Geological Survey; Utah Division of Oil, Gas and Mining; U.S. Energy Information Administration

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

Year	Supply			Consumption by Product					Exports	Prices	
	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	9,411	35,983	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	6,073	35,172	20,359	$0.92	$0.88
1988	57,354	2,306	8,926	18,148	4,977	7,060	5,786	35,971	22,031	$0.95	$0.89
1989	55,184	2,685	9,550	17,311	5,095	5,917	6,371	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	8,409	44,628	20,512	$1.21	$1.29
1997	58,677	2,640	12,949	22,024	6,279	9,976	6,250	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	48,013	23,937	$1.41	$1.45
2002	59,514	2,739	16,848	24,158	6,416	11,482	5,394	47,450	24,082	$1.32	$1.34
2003	57,511	2,846	16,515	24,325	6,758	12,082	6,917	50,082	22,729	$1.56	$1.54
2004	63,071	2,599	18,486	24,744	7,137	12,264	6,289	50,434	24,475	$1.82	$1.87
2005	63,487	2,806	20,258	24,677	7,394	13,717	7,015	52,803	24,482	$2.20	$2.45
2006	64,806	2,587	18,976	25,312	7,560	17,292	6,699	56,863	23,321	$2.50	$2.80
2007	66,443	2,924	15,991	26,054	7,085	15,946	6,465	55,550	22,851	$2.73	$2.98
2008	65,178	2,513	14,854	25,051	6,509	14,138	6,415	52,113	21,619	$3.22	$3.79
2009	64,752	2,715	13,138	25,324	5,751	12,852	5,854	49,781	21,043	$2.23	$2.48
2010	62,310	2,665	12,307	24,761	5,875	12,707	6,330	49,673	21,490	$2.82	$3.03
2011	65,369	2,689	11,383	25,568	5,767	15,448	6,746	53,529	23,058	$3.44	$3.87
2012	70,456	2,860	13,316	25,228	5,572	14,776	6,688	52,264	26,695	$3.59	$3.98
2013	67,892	3,077	15,204	26,085	6,399	15,317	6,355	54,156	26,654	$3.45	$3.88
2014	70,931	2,676	13,853	26,469	5,716	15,169	6,260	53,614	27,260	$3.30	$3.85
2015	70,385	2,980	16,615	27,776	6,204	14,293	6,158	54,431	28,972	$2.47	$2.67
2016	75,780	2,771	16,402	28,535	6,944	14,248	6,574	56,301	30,966	$2.19	$2.31
2017	78,473	2,652	15,530	28,769	6,678	15,043	6,747	57,237	32,666	$2.39	$2.71
2018*	75,506	2,918	15,876	28,900	7,080	14,500	6,800	57,280	31,164	$2.82	$3.22
2019e	79,700	2,762	16,200	30,300	6,900	14,800	6,900	58,900	32,800	$2.73	$3.03

*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 is offloaded near Cedar City (amount estimated).

Note: Prices are in nominal dollars.

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

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

Year	Production				Consumption by End Use							Prices					Value
	Gross Production (Million cubic feet)	**Wet/Dry Production**[1] (Million cubic feet)	**Actual Sales** (Million cubic feet)	**Natural Gas Liquids**	**Residential** (Million cubic feet)	**Commercial** (Million cubic feet)	**Vehicle Fuel** (Million cubic feet)	**Industrial** (Million cubic feet)	**Electric Utilities** (Million cubic feet)	**Lease, Plant, & Pipeline** (Million cubic feet)	**Total** (Million cubic feet)	**Wellhead** ($/thousand cubic feet)	**End-Use Residential** ($/thousand cubic feet)	**End-Use Commercial** ($/thousand cubic feet)	**End-Use Industrial** ($/thousand cubic feet)	**Natural Gas Liquids** ($/bbl)	**Value of NG and NGL** (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
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
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
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	$215
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	$305
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	$294
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
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	$164
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
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	$190
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
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
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
1993	338,276	212,101	132,660	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
1994	348,140	257,078	153,931	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	$426
1995	308,695	227,611	156,299	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	$290
1996	280,439	239,797	169,254	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
1997	272,554	239,267	177,087	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
1998	297,503	265,539	191,073	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
1999	277,494	251,207	164,050	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
2000	281,170	256,490	140,226	5,150	55,626	31,282	848	39,378	10,544	27,344	165,022	$3.31	$6.20	$4.92	$3.93	$11.31	$907
2001	300,966	272,534	219,138	4,641	55,008	30,917	474	33,584	15,141	24,175	159,300	$3.54	$8.09	$6.78	$5.29	$12.47	$1,023
2002	293,030	271,387	250,172	3,542	59,398	33,501	482	26,879	15,439	27,681	163,380	$1.99	$6.39	$5.20	$3.91	$8.91	$572
2003	287,141	264,654	224,327	3,080	54,632	30,994	589	25,200	14,484	28,226	154,125	$4.12	$7.33	$5.95	$5.04	$12.18	$1,128
2004	293,807	274,588	253,855	3,196	60,527	31,156	661	26,674	9,423	27,450	155,891	$5.22	$8.12	$6.75	$5.90	$19.66	$1,496
2005	313,491	298,408	269,062	2,310	58,044	34,447	187	25,370	12,239	29,989	160,276	$7.40	$9.71	$8.23	$7.33	$32.31	$2,283
2006	356,339	345,409	320,163	1,925	60,017	34,051	186	29,076	28,953	35,116	187,399	$5.69	$11.02	$9.61	$8.02	$31.40	$2,026
2007	385,517	373,680	350,285	1,769	60,563	34,447	209	31,578	56,438	36,464	219,699	$4.14	$9.44	$8.03	$6.35	$45.16	$1,627
2008	442,524	430,286	382,960	2,564	65,974	37,612	208	33,112	55,374	31,907	224,187	$6.82	$9.00	$7.74	$7.21	$68.15	$3,109
2009	449,675	435,673	390,475	4,817	65,184	37,024	149	29,845	49,984	32,034	214,220	$3.38	$8.95	$7.57	$5.62	$38.87	$1,660
2010	439,929	422,067	387,593	5,869	66,087	38,461	203	32,079	48,399	33,985	219,214	$4.25	$8.22	$6.83	$5.57	$49.98	$2,087
2011	462,495	442,615	406,323	7,571	70,076	40,444	290	33,633	40,138	37,646	222,227	$3.92	$8.44	$7.05	$5.50	$60.99	$2,197
2012	490,575	474,756	436,090	8,106	59,801	35,363	289	36,350	47,138	44,098	223,039	$2.82	$8.70	$7.00	$4.69	$50.49	$1,748
2013	470,349	455,454	409,704	8,132	70,491	41,398	224	38,009	49,562	47,602	247,286	$3.68	$8.55	$7.13	$5.22	$54.03	$2,115
2014	450,024	435,893	391,536	9,693	62,458	38,156	256	38,330	58,780	43,758	241,738	$4.35	$9.48	$7.71	$5.87	$46.13	$2,343
2015	417,023	401,722	360,018	7,286	58,562	35,772	326	37,189	56,449	44,315	232,613	$2.60	$9.72	$7.97	$5.93	$22.84	$1,213
2016	365,281	352,437	319,056	5,573	63,929	39,066	305	38,568	59,684	38,562	240,114	$2.24	$9.12	$7.43	$5.52	$25.51	$932
2017	315,197	304,266	278,012	4,813	66,700	41,264	348	40,007	40,830	32,679	221,828	$2.72	$9.05	$7.40	$5.51	$31.94	$981
2018	295,838	285,248	249,763	3,817	67,415	42,367	345	39,935	61,161	32,548	243,771	$2.77	$9.04	$7.37	$5.31	$46.33	$967
2019e	271,000	262,000	236,000	3,800	71,000	44,200	350	41,000	66,000	32,000	254,550	$2.60	$8.00	$6.50	$4.80	$27.00	$784

e = estimate

na = not available, NG = natural gas, NGL = natural gas liquids

[1]1980–1992 = wet natural gas, which includes NG liquids; 1993–2019 = dry natural gas.

Note: Prices and values are in nominal dollars.

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

Table 17.4: Supply, Disposition, Prices, and Value of Coal in Utah

Year	Supply		Distribution	Consumption by End Use					Exports		Prices		Value
	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										$/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
1981	13,808	1,136	14,627	196	1,477	804	4,956	7,433	5,369	3,472	$26.87	$28.88	$371
1982	16,912	798	15,397	177	845	818	4,947	6,787	6,044	2,177	$29.42	$32.55	$498
1983	11,829	937	12,188	191	831	627	5,223	6,872	4,818	1,346	$28.32	$30.87	$335
1984	12,259	1,539	12,074	259	1,326	608	5,712	7,905	5,651	849	$29.20	$30.63	$358
1985	12,831	1,580	14,361	252	1,254	472	6,325	8,303	5,901	625	$27.69	$32.34	$355
1986	14,269	1,145	13,243	191	785	380	6,756	8,112	4,790	551	$27.64	$32.39	$394
1987	16,521	1,358	16,989	124	0	507	11,175	11,806	5,107	555	$25.67	$29.05	$424
1988	18,164	2,191	18,204	196	1,176	597	12,544	14,513	4,973	1,044	$22.85	$28.96	$415
1989	20,517	2,344	20,289	231	1,178	686	12,949	15,044	5,108	2,175	$22.01	$28.49	$452
1990	22,012	2,121	21,507	267	1,231	676	13,563	15,737	5,649	1,751	$21.78	$26.91	$479
1991	21,875	2,014	21,444	305	1,192	508	12,829	14,834	5,744	2,086	$21.56	$27.24	$472
1992	21,015	2,672	21,052	223	1,114	525	13,857	15,719	5,741	2,260	$21.83	$27.59	$459
1993	21,723	2,076	22,242	121	1,005	727	14,210	16,063	5,844	2,959	$21.17	$27.15	$460
1994	24,422	2,427	23,225	105	1,007	835	14,656	16,603	6,912	2,698	$20.07	$25.85	$490
1995	25,051	1,847	25,522	77	990	915	13,693	15,675	8,837	3,930	$19.11	$24.84	$479
1996	27,071	1,785	28,159	94	1,047	512	13,963	15,616	9,167	5,305	$18.50	$24.36	$501
1997	26,428	2,840	26,271	123	1,020	709	14,654	16,506	8,898	3,414	$18.34	$24.87	$485
1998	26,600	2,543	26,764	113	971	1,304	15,094	17,482	11,698	2,535	$17.83	$25.66	$474
1999	26,491	1,938	25,715	114	741	744	15,011	16,610	12,424	2,313	$17.36	$23.60	$460
2000	26,920	2,535	27,955	59	984	1,166	15,164	17,373	12,553	3,073	$16.93	$23.16	$456
2001	27,024	3,062	26,906	60	547	1,235	14,906	16,748	15,920	2,144	$17.76	$25.48	$480
2002	25,299	2,251	24,392	198	0	592	15,644	16,434	13,170	1,142	$18.20	$21.84	$460
2003	23,069	2,039	23,551	61	0	611	16,302	16,974	9,584	318	$16.36	$23.20	$377
2004	21,818	3,033	23,145	214	0	1,330	16,606	18,150	9,294	346	$16.82	$24.95	$367
2005	24,556	2,776	23,025	45	0	1,431	17,118	18,594	8,835	351	$18.71	$24.52	$459
2006	26,131	1,925	24,520	35	0	680	16,609	17,324	9,279	55	$21.77	$27.34	$569
2007	24,288	1,596	24,451	23	0	911	16,593	17,527	8,877	0	$25.69	$30.33	$624
2008	24,275	2,528	25,426	0	0	873	16,927	17,800	9,219	541	$26.39	$30.66	$641
2009	21,927	4,251	20,487	0	0	718	15,925	16,643	6,643	148	$32.32	$33.96	$709
2010	19,406	1,775	19,220	0	0	717	15,233	15,950	5,807	634	$29.15	$37.68	$566
2011	20,073	2,020	19,039	0	0	598	15,005	15,603	4,841	1,081	$33.80	$39.21	$678
2012	17,155	1,708	16,140	0	0	588	14,084	14,672	3,012	1,080	$34.92	$41.84	$599
2013	16,953	1,864	16,328	0	0	645	15,529	16,174	2,673	1,110	$35.52	$44.73	$602
2014	17,933	1,967	17,829	0	0	614	15,062	15,676	2,543	2,869	$35.59	$46.03	$638
2015	14,513	3,098	14,938	0	0	662	14,580	15,242	2,116	735	$34.53	$42.12	$501
2016	13,978	1,908	14,620	0	0	575	12,001	12,576	1,890	1,049	$36.40	$41.36	$509
2017	14,417	2,314	15,020	0	0	485	12,438	12,923	2,242	3,123	$35.28	$41.56	$509
2018	13,753	1,907	14,085	0	0	378	12,332	12,710	1,908	3,148	$36.31	$42.83	$499
2019e	15,300	1,800	14,800	0	0	350	12,100	12,450	2,200	4,000	$35.50	$41.30	$543

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

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

Year	Net Generation by Fuel Type										Consumption by End Use					Prices by End Use			
	Coal	Petroleum	Natural Gas	Hydro	Geo-thermal	Wind	Solar	Biomass[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	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	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	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	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	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	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	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	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	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	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	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	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	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	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	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	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	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	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	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	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	0	9	258	36,639	6,514	8,754	7,917	23,185	2.90	6.3	5.2	3.4	4.8
2001	33,679	58	1,446	508	186	0	0	5	4	35,887	6,693	9,113	7,411	23,217	2.92	6.7	5.6	3.5	5.2
2002	34,488	54	1,380	458	247	0	0	6	5	36,638	6,938	9,309	7,019	23,267	2.98	6.8	5.6	3.8	5.4
2003	35,979	33	1,383	421	198	0	0	5	4	38,024	7,166	9,048	7,646	23,860	3.02	6.9	5.6	3.8	5.4
2004	36,618	33	910	450	195	0	0	4	3	38,212	7,325	9,370	7,816	24,512	3.01	7.2	5.9	4.0	5.7
2005	35,970	41	1,178	784	185	0	0	4	3	38,165	7,567	9,444	7,989	25,000	3.02	7.5	6.1	4.2	5.9
2006	36,856	62	3,389	747	191	0	0	15	5	41,263	8,232	9,778	8,356	26,366	3.20	7.6	6.2	4.2	6.0
2007	37,171	39	7,424	539	164	0	0	31	5	45,373	8,752	10,275	8,759	27,785	3.32	8.2	6.5	4.5	6.4
2008	38,020	44	7,366	668	254	24	0	24	179	46,579	8,786	10,319	9,086	28,192	3.26	8.3	6.7	4.6	6.5
2009	35,526	36	6,444	835	279	160	0	48	215	43,543	8,725	10,268	8,594	27,587	3.19	8.5	7.0	4.8	6.8
2010	34,057	50	6,455	696	277	448	0	56	210	42,249	8,834	10,402	8,808	28,044	3.19	8.7	7.2	4.9	6.9
2011	33,138	54	5,256	1,230	330	573	0	58	197	40,836	8,947	10,579	9,333	28,859	3.17	9.0	7.4	5.1	7.1
2012	30,799	40	6,580	748	335	704	2	60	137	39,403	9,188	10,841	9,694	29,723	3.21	9.9	8.1	5.6	7.8
2013	34,285	26	6,606	505	319	540	2	71	163	42,517	9,402	11,062	10,010	30,474	3.24	10.4	8.3	5.9	8.2
2014	33,377	24	8,376	633	522	660	2	73	118	43,785	8,964	11,114	9,965	30,043	3.05	10.7	8.5	6.1	8.4
2015	31,656	20	8,218	769	430	626	32	85	114	41,949	9,117	11,670	9,405	30,192	3.04	10.9	8.6	6.2	8.5
2016	25,939	32	8,691	760	485	822	1,054	84	267	38,134	9,371	11,622	9,187	30,180	3.07	11.0	8.8	6.3	8.7
2017	26,390	38	5,871	1,294	481	858	2,211	78	191	37,412	9,511	11,795	9,283	30,589	3.05	11.0	8.7	6.1	8.6
2018	25,912	37	8,724	927	446	795	2,224	79	232	39,375	9,715	12,135	9,393	31,242	3.07	10.4	8.2	5.9	8.2
2019e	25,400	38	9,300	950	470	930	2,250	75	220	39,633	9,500	11,750	9,300	30,550	2.96	10.5	8.3	6.0	8.3

e = estimate

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

[2]Includes blast furnace gas, propane gas, and other manufactured and waste gases derived from fossil fuels, as well as nonbiogenic municipal solid waste.

Note: Prices are in nominal dollars.

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

Minerals

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Andrew Rupke, Utah Geological Survey
Stephanie Mills, Utah Geological Survey

2019 OVERVIEW

The Utah Geological Survey (UGS) projects an estimated gross production value of metallic and industrial mineral commodities of $3.2 billion in 2019, a slight decrease of about 1.1% from the value in 2018.

The U.S. Geological Survey reports the 2018 value of Utah's nonfuel (metallic and industrial) minerals production ranks eighth nationally, accounting for 3.6% of the total U.S. nonfuel minerals production. The UGS's 2019 production values are derived primarily from annual industry production surveys, corporate quarterly reports, and discussions with mining industry professionals.

Utah's 2019-estimated $3.2 billion total mineral value includes a base metals value of $1.7 billion (50.9%), precious metals value of $370 million (11.5%), and industrial minerals value of $1.2 billion (37.6%). Utah's base metal production includes copper, magnesium, beryllium, and molybdenum, in decreasing order of importance. Gold is Utah's top precious metal, followed by silver. Utah also produces a long list of industrial mineral commodities including potash, salt, sand and gravel, crushed stone, portland cement, lime, limestone, phosphate, gilsonite, and a variety of less valuable mineral products.

Kennecott Utah Copper's Bingham Canyon open-pit mine is by far the most important contributor to base and precious metal production in the state. Bingham is the leading producer of copper, gold, and silver, and is the only producer of molybdenum. Copper production in 2019 has been impacted by grade variability as mining moves lower into the pit and is expected to be slightly lower than 2018. To offset this variability over the long term, the mine has been engaged in the south wall pushback, a $900 million growth project that will allow continuation of open-pit mining through 2027 and access to higher, more consistent grade ore. This area of the ore body is expected to be accessed beginning late 2020. Gold and silver are produced as byproducts of copper mining, hence increased copper grades are also expected to yield improved gold and silver production. The lower parts of the Bingham ore body are also characterized by increased molybdenum grade such that molybdenum production is expected to increase as deeper parts of the pit are mined.

Lisbon Valley Copper, an open-pit heap leach production located in San Juan County, suspended active mining mid-2018 and has focused on reprocessing the existing leach pads to enhance copper recovery. The company is advancing a plan for in situ mining, which would allow mining of deeper parts of the ore body that are uneconomic using current open-pit methods. Company scientists have met with Utah Department of Environmental Quality and U.S. Environmental Protection Agency representatives and are nearing completion of their permit application.

Magnesium metal production by US Magnesium LLC in Tooele County is expected to rebound from relatively low production resulting from closure of the adjacent titanium plant in 2016 that was an important consumer of magnesium. Beryllium production by Materion Resources in Juab County has experienced a moderate increase, given that the Spor Mountain mine represents 75 to 80% of the global beryllium supply. No uranium or vanadium mining took place in 2019, with the last active mining in 2012. However, Energy Fuels' White Mesa Mill in San Juan County produced both uranium and vanadium for commercial markets from existing ore stockpiles and from limited test mining.

Based on company projections, change in production of most industrial mineral commodities from 2018 to 2019 will not be significant. The U.S. Geological Survey data from the first half of 2019 suggest that construction aggregate production is down 8% in 2019 compared to 2018 after increasing the previous year. Construction aggregate, consisting of sand and gravel and crushed stone, is one of the more significant commodities in Utah and is an indicator of the overall construction market. Production of construction aggregate will likely

remain relatively high over the next few years due to ongoing construction of the Salt Lake City airport and construction driven by Utah's increasing population.

Metals exploration remains active in Utah. Enhanced merger and acquisition activity and a tight global investment market has made investment in junior explorers difficult to secure. The mega mergers of Barrick-Randgold and Newmont-Goldcorp alone have resulted in a combined cut of $102 million from exploration, including withdrawal from Utah projects. However, both junior and major companies have been re-investing in old mining districts such as the Tintic districts in Juab and Utah Counties, the Stockton and Ophir districts in Tooele County, and the Mount Baldy district in Piute County. Junior explorers continue pushing greenfield base and precious metal exploration in the Kings Canyon district, Millard County; Gold Springs district, Iron County; San Francisco district, Beaver County; Goldstrike district, Washington County; Copper Ridge, San Juan County; and Gold Hill and West Dip districts, Tooele County. Vanadium exploration has dropped off sharply from a peak in late 2018-early 2019, given the decline in price.

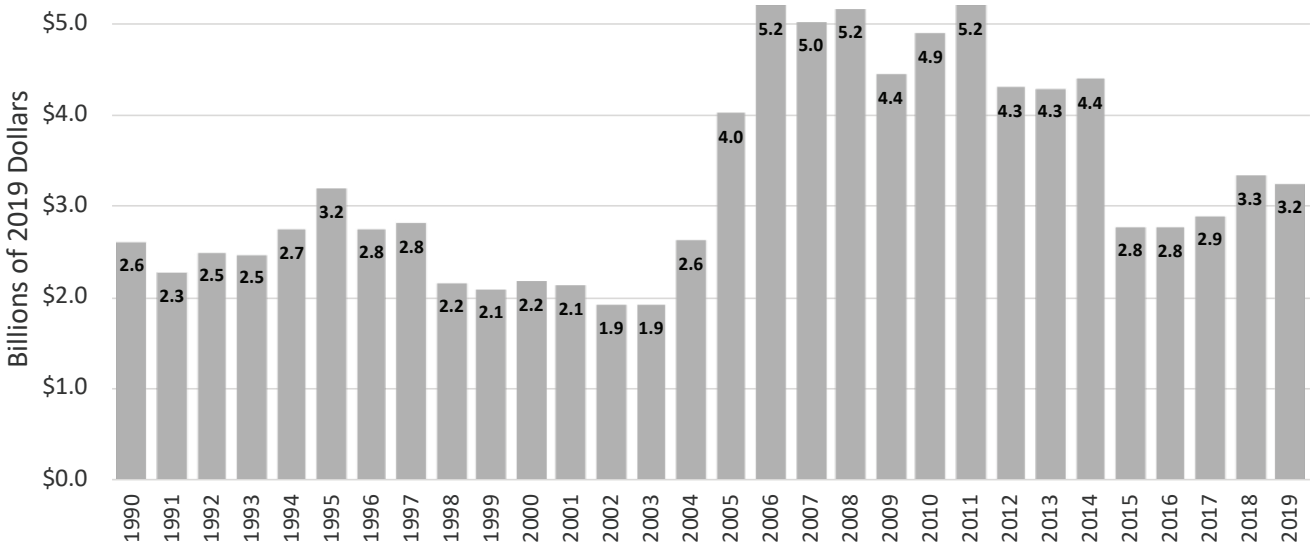
The most significant recent industrial minerals development in Utah is the completion of a final environmental impact statement and subsequent Record of Decision from the U.S. Bureau of Land Management for Crystal Peak Mineral's potash project at Sevier Lake in Millard County. Crystal Peak Minerals intends to produce potassium sulfate, a more valuable type of potash than the typical potassium chloride. Earlier in the decade, several potash exploration projects were active in Utah, but interest in potash overall has waned due to lower prices.

Other industrial mineral exploration and development has focused on frac sand and lithium. Interest in frac sand is a response to the oil and gas industry's trend of using ever-increasing amounts of sand in hydraulic fracturing of wells. Several areas in Utah have been investigated for frac sand resources, and two projects are in development. One project near Vernal is close to producing sand and will supply Uinta Basin oil and gas plays. Another project near Kanab is in the early stages of development. In 2018, a frac sand rail terminal was completed in Wellington, Utah, which could compete with Utah-based prospective mines. Several thousand lithium claims were filed in 2016, 2017, and 2018 on Utah BLM land, but limited assessment work was performed in conjunction with these claims. However, one company, Anson Resources, has been re-entering old oil and gas wells in the Paradox Basin to test lithium concentrations in brines with some success. Lithium exploration has been driven by a surge in global demand and increasing prices, but interest will likely wane as existing large producers and advanced exploration projects in Australia and South America increase production and move toward development.

2020 OUTLOOK

Access to higher grade ore at Bingham Canyon, mainly through the south wall pushback project, will likely drive increased base and precious metal production in late 2020 and beyond. Industrial minerals production and value is expected to remain stable through 2020 with no anticipated substantial swings in commodity prices or production. In summary, the UGS estimates that the gross production value of Utah's metallic and industrial mineral commodities in 2020 will be incrementally higher than 2019 totals driven by higher production at the Bingham Canyon mine.

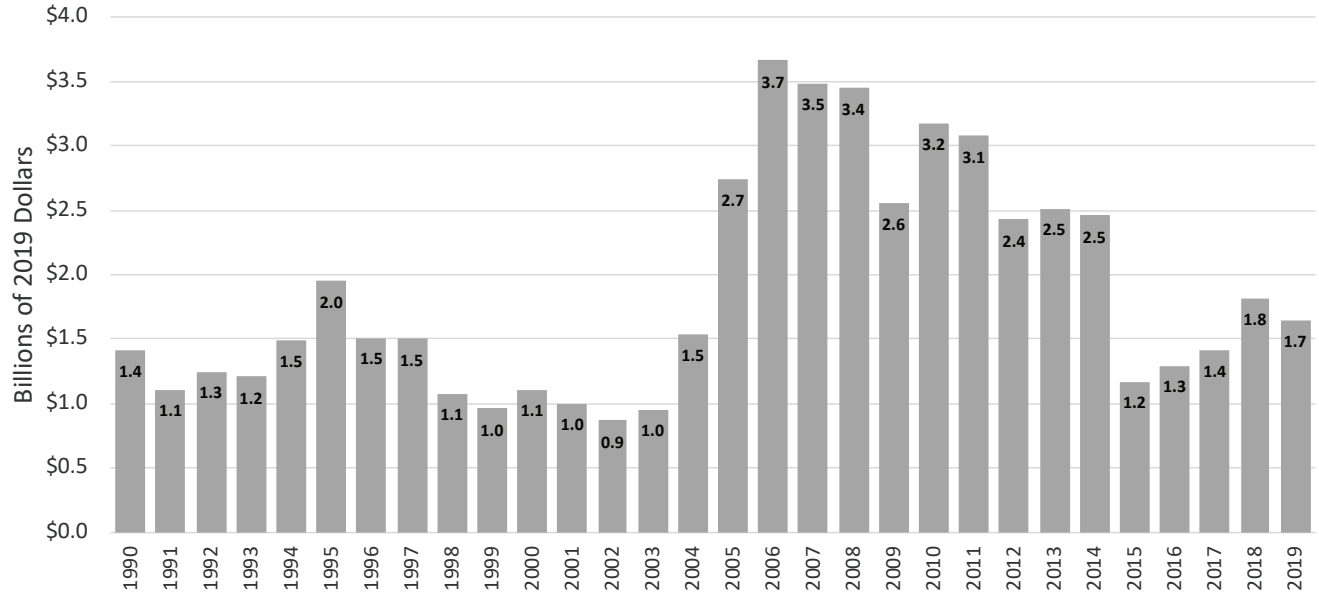
Figure 18.1: Total Value of Utah's Annual Metallic and Industrial Mineral Production



Note: The value presented for 2019 is an estimate.

Source: Utah Geological Survey.

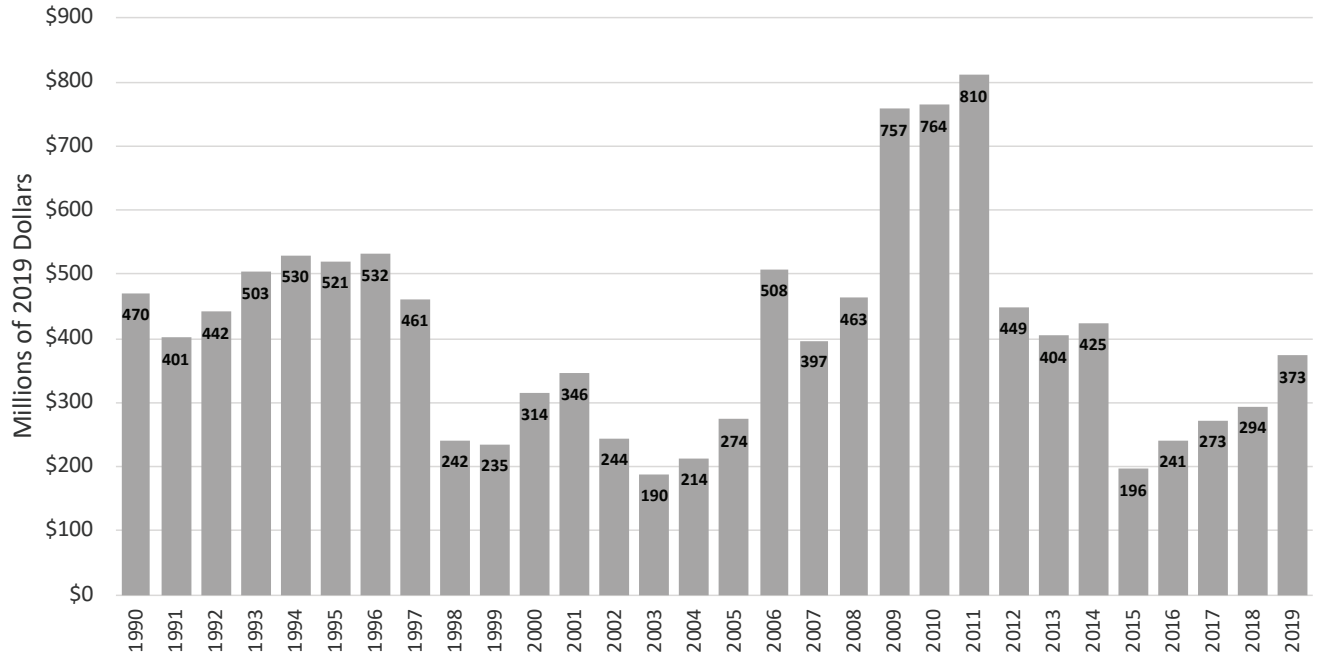
Figure 18.2: Value of Utah's Annual Base Metal Production



Note: The value presented for 2019 is an estimate.

Source: Utah Geological Survey.

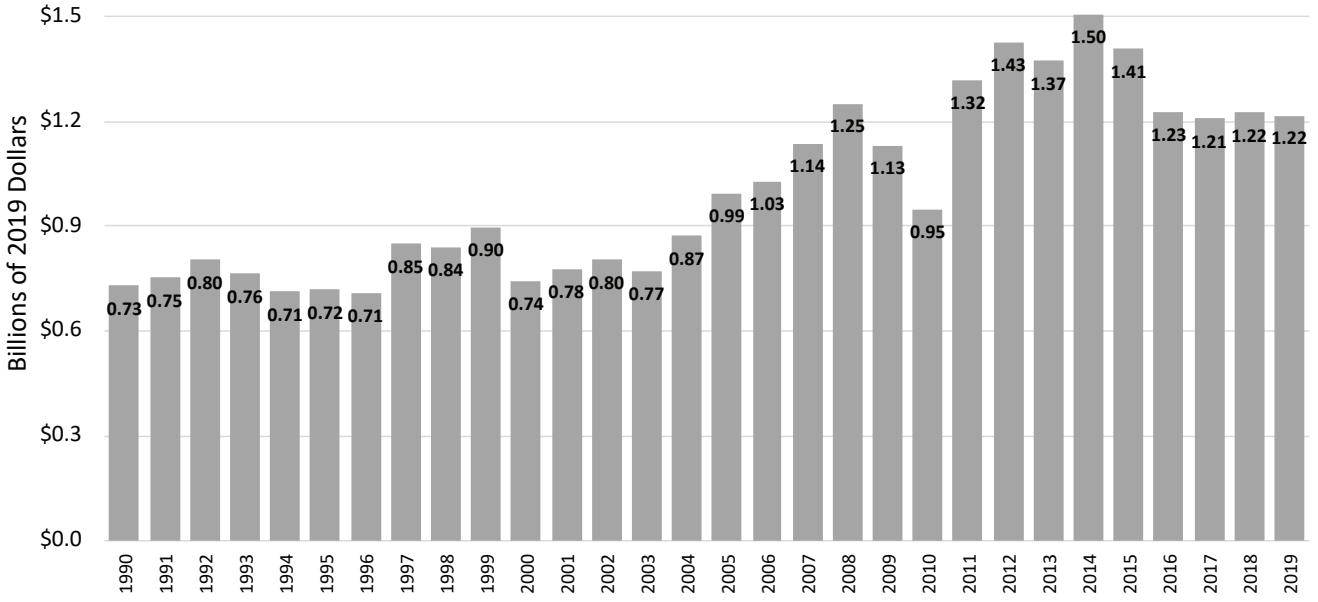
Figure 18.3: Value of Utah's Annual Precious Metal Production



Note: The value presented for 2019 is an estimate.

Source: Utah Geological Survey.

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



Note: The value presented for 2019 is an estimate.

Source: Utah Geological Survey.

Travel and Tourism

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Jennifer Leaver, Kem C. Gardner Policy Institute

2019 OVERVIEW

Utah's travel and tourism sector experienced continued economic growth in 2019, including record-level visitor spending, jobs and wages, and state and local tax revenue.

At the time of publication, year-to-date travel-related sales tax revenues, such as transient room, restaurant, and resort communities' sales, were trending 5.0-9.0% higher than 2018 revenues. During the first three quarters of 2019, 23 of Utah's 29 counties experienced year-over-year increases in county transient room tax revenue. Additionally, total taxable sales in the leisure and hospitality sector increased 6.1% during the first half of 2019, while gas station, grocery store, and other travel-related retail sales increased around 2.0%.

During the first half of 2019, jobs in Utah's private leisure and hospitality sector experienced a 3.8% year-over-year increase—higher than the average of all other sectors combined (3.1%). Leisure and hospitality sector wages increased 6.5% compared to 7.1% for all other sectors.

Due to above-average snowfall and an extended season, Utah's 2018-2019 skier spending set a new record at $1.4 billion. During the 2018-2019 season, the Utah Office of Tourism (UOT) continued its "Mountain Time" marketing campaign (launched the previous year). According to Strategic Marketing & Research Insights, the UOT's winter ad campaign generated 127,000 incremental (ad-influenced) skier and snowboarder visits and $358.0 million in spending.

In spring 2019, the UOT created a new three-season advertising campaign called "Between." The UOT's "Between" ads retained many "Road to Mighty" ad visuals, but included different scripts, voiceovers, and music. The UOT recently placed greater emphasis on "Between" messaging, which highlights places to visit between the Mighty 5 national parks.

Utah state park visitation from January to August 2019 increased 17.7% compared to the same period in 2018, while Utah national park visits remained flat.

In 2019, Utah's Board of Tourism Development allocated more than $4.5 million in cooperative marketing matching funds statewide, $150,000 through its cafeteria co-op marketing program matching funds, and over $348,000 to destination development.

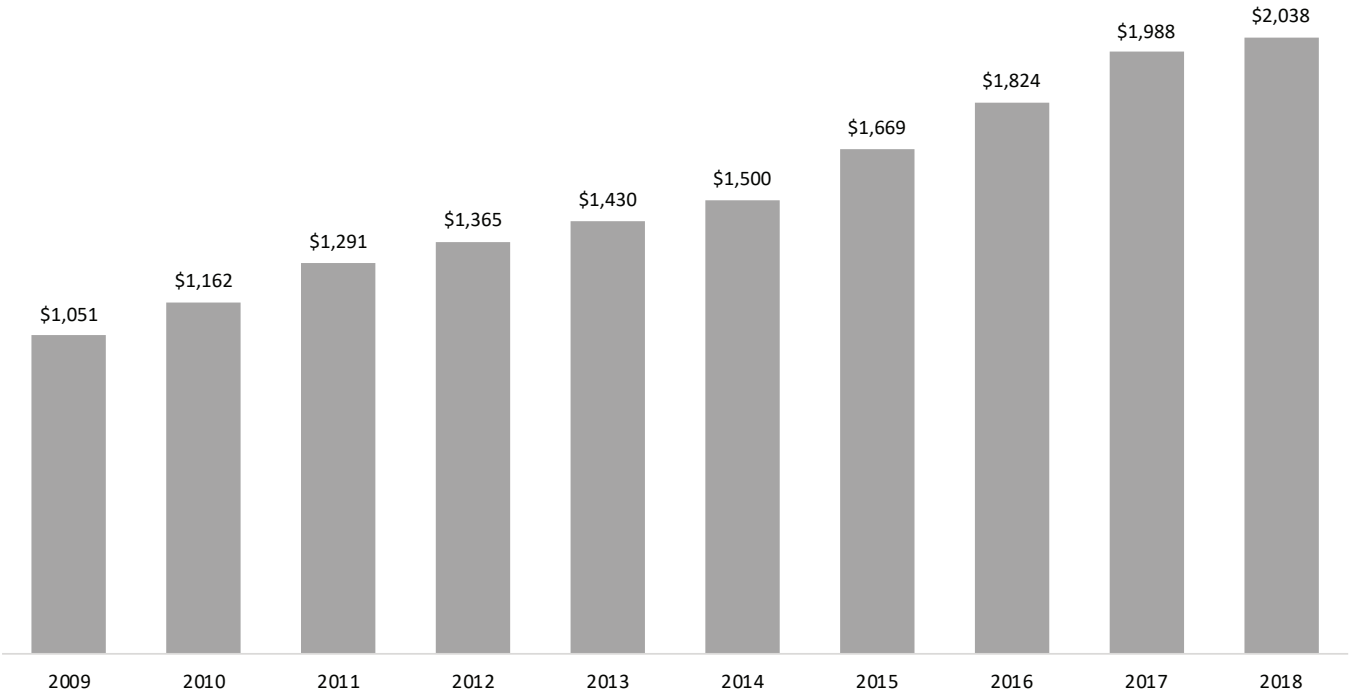
2020 OUTLOOK

Travel industry forecasters anticipate decelerating 2020 trends in U.S. domestic and international travel. Travel experts predict domestic visitor spending will increase at a slower rate than in years past due to a general U.S. economic slowdown, including less inflation and oil price declines. Analysts expect international visitor spending to increase modestly as well.

Travel experts believe domestic business travel will grow at a faster rate than leisure travel based on U.S. business profit increases. In addition, the U.S. will continue to lose its share of global long-haul travel because of increased global competition and a strong U.S. dollar. U.S.-China trade tensions have negatively affected Chinese visitation to the U.S. and China is Utah's second largest international travel market. Nevertheless, forecasters expect a 3.3% year-over-year increase in combined U.S. domestic and international visitor spending.

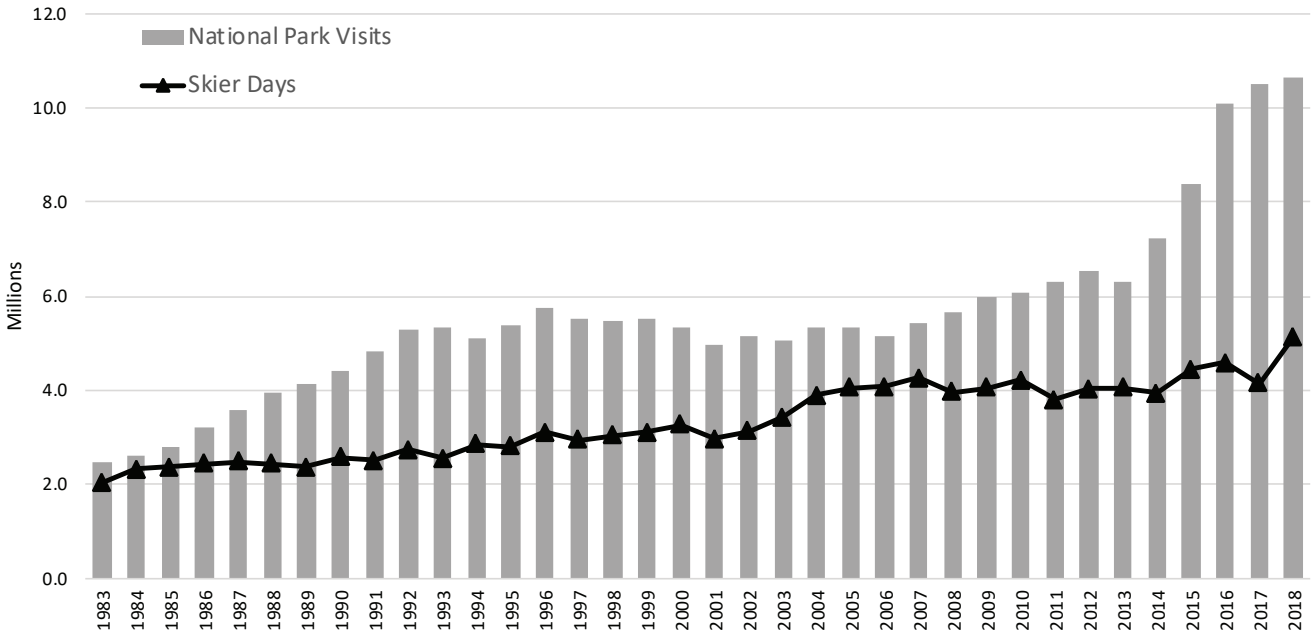
Despite economic slowdowns and shifting international travel trends, Utah's 2020 travel and tourism outlook remains optimistic. In the year ahead, we estimate Utah's travel and tourism industry will experience the following increases: 5.0% in spending, 4.0% in jobs, 7.0% in wages, and 7.0% increase in travel-related tax revenues.

Figure 19.1: Accommodations Taxable Sales, 2009-2018 (2018 Dollars in Millions)



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

Figure 19.2: Utah National Park and Skier Visits, 1983-2018



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

Table 19.1: Historical Utah Tourism Data

Year	Accommodations Taxable Sales (millions*)	National Park Visits	State Park Visits	Salt Lake Int'l. Airport Passengers	Skier Days	Travel-Related Employment	Visitor Spending (millions*)	International Visitor Spending (millions*)	Travel-Related Tax Revenue (millions*)
1983	$141	2,465,294	5,214,498	7,059,964	2,369,901	na	na	na	na
1984	$161	2,616,301	4,400,103	7,514,113	2,436,544	na	na	na	na
1985	$165	2,804,693	4,846,637	8,984,780	2,491,191	na	na	na	na
1986	$176	3,224,694	5,387,791	9,990,986	2,440,668	na	na	na	na
1987	$197	3,566,069	5,489,539	10,163,883	2,368,985	na	na	na	na
1988	$221	3,941,791	5,072,123	10,408,233	2,572,154	na	na	na	na
1989	$241	4,135,399	4,917,615	11,898,847	2,500,134	na	na	na	na
1990	$261	4,425,086	5,033,776	11,982,276	2,751,551	na	na	na	na
1991	$295	4,829,317	5,425,129	12,477,926	2,560,805	na	na	na	na
1992	$313	5,280,166	5,908,000	13,870,609	2,839,650	na	na	na	na
1993	$352	5,319,760	6,950,063	15,894,404	2,808,148	na	na	na	na
1994	$378	5,111,428	6,953,400	17,564,149	3,113,072	na	na	na	na
1995	$429	5,381,717	7,070,702	18,460,000	2,954,690	na	na	na	na
1996	$477	5,749,156	7,478,764	21,088,482	3,042,767	na	na	na	na
1997	$519	5,537,260	7,184,639	21,068,314	3,101,735	na	na	na	na
1998	$677	5,466,090	6,943,780	20,297,371	3,095,347	na	na	na	na
1999	$692	5,527,478	6,768,016	19,944,556	2,959,778	na	na	na	na
2000	$743	5,332,266	6,555,299	19,900,770	3,278,291	na	na	na	na
2001	$763	4,946,487	6,075,456	18,367,961	2,984,574	na	na	na	na
2002	$840	5,147,950	5,755,782	18,662,030	3,141,212	na	na	na	na
2003	$766	5,042,756	4,570,393	18,466,756	3,429,141	na	na	na	na
2004	$820	5,318,157	4,413,702	18,352,495	3,895,578	na	$5,648	na	$758
2005	$900	5,329,931	4,377,041	22,237,936	4,062,188	na	$5,779	na	$772
2006	$921	5,165,498	4,494,990	21,557,646	4,082,094	na	$5,908	na	$785
2007	$1,006	5,445,591	4,925,277	22,044,533	4,249,190	na	$6,769	$628	$905
2008	$1,049	5,670,851	4,564,770	20,790,400	3,972,984	na	$6,925	$697	$908
2009	$909	6,002,104	4,820,930	20,432,218	4,048,153	na	$5,689	$565	$771
2010	$1,015	6,072,900	4,842,891	21,016,686	4,223,064	na	$6,317	$667	$867
2011	$1,161	6,304,838	4,803,876	20,389,474	3,826,130	na	$6,955	$731	$942
2012	$1,248	6,555,833	5,093,740	20,096,549	4,031,621	109,300	$7,318	$774	$989
2013	$1,323	6,328,040	4,063,382	20,186,474	4,148,573	110,900	$7,507	$838	$1,058
2014	$1,406	7,239,149	3,740,896	21,141,610	3,946,762	115,200	$7,805	$789	$1,097
2015	$1,571	8,369,533	4,482,866	22,141,026	4,457,575	119,700	$8,259	$770	$1,150
2016	$1,732	10,087,077	5,175,615	23,155,527	4,584,658	125,900	$8,535	$805	$1,113
2017	$1,932	10,507,960	5,690,677	24,199,351	4,145,321	129,400	$9,148	$830	$1,202
2018	$2,038	10,600,000	6,711,932	25,554,244	5,125,441	136,600	$9,745	$823	$1,277
Percent Change 2017-2018	5.5%	0.9%	17.9%	5.6%	23.6%	5.6%	6.5%	-0.8%	6.2%
Average Annual Rate of Change	7.9%	4.3%	0.7%	3.7%	2.2%	3.8%	4.0%	9.5%	3.8%

*Dollar amounts reported in nominal dollars

Notes: Utah State Parks employed a new methodology in 2013 and began reporting fiscal year instead of calendar year. Accommodations taxable sales from 1998 to 2016 were updated February 2018. Spending estimates provided by D.K. Shifflet (2004-2008) and U.S. Travel Association (2009-present); visitor spending includes international spending. Tax revenue estimates provided by GOMB (2004-2008) and Kem C. Gardner Policy Institute (2009-present); new methodology employed in 2016.

Sources: National Park Service; Utah State Tax Commission; Utah Department of Transportation; Department of Workforce Services; Department of Natural Resources; Salt Lake International Airport; Ski Utah; Department of Community & Economic Development; Governor's Office of Economic Development; Kem C. Gardner Policy Institute - University of Utah; Governor's Office of Management and Budget; Utah Office of Tourism; D.K Shiflet and Associates Ltd; U.S. Travel Association; and Tourism Economics.

Defense

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

2019 OVERVIEW

Employment

In 2018, there were 33,965 total federal defense employees in Utah: 16,329 military personnel and 17,636 civilian employees. This was a 0.8% increase from 2017. Over the past five years Utah has seen a net gain of 1,415 federal civilian jobs (9% increase) and a net loss of 103 military personnel (less than a 1% decrease). The installations that employ the majority of Utah's federal defense employees are Hill Air Force Base, Dugway Proving Ground, Tooele Army Depot, Utah National Guard, the Reserves, and Veteran Affairs (benefits office, hospital, clinics, and centers). Federal defense employment does not include defense-related private sector employment, such as jobs at defense contractors.

Federal defense employment in Utah shrank from 42,474 in 1990 to a recent low of 29,276 in 1999. However, since 2002 the total number of defense jobs has remained relatively stable at between 33,000 and 34,000. Because of this decline and stabilization while the rest of Utah's economy has grown, defense's share of total employment has fallen from 4.5% in 1990 to 1.6% in 2018.

In 2018, 80% of federal defense employment in Utah was located in three counties: 17,400 jobs in Davis County (51%), 8,412 jobs in Salt Lake County (25%), and 1,350 jobs in Tooele County (4%). Davis County's large share of defense employment is attributed to Hill Air Force Base, the largest military installation in Utah. Hill AFB was the state's sixth largest employer in 2018. The largest installations in Salt Lake and Tooele counties were the reserve branches of the armed forces and Dugway Proving Ground, respectively.

Compensation

Compensation per federal defense job in Utah has historically been considerably higher than Utah's average compensation rate, with the gap widening by over 50% between 1998 and 2010. Even with some tapering in recent years, federal defense jobs in Utah offered an average of $81,900 in compensation, 34% more than the $60,900 at non-defense jobs in 2018.

Federal civilian jobs accounted for more than two-thirds (71%) of total federal defense compensation in 2018. In the same year, 81% of federal civilian defense compensation came from national security jobs, down from 85% in 2013. In the last five years, civilian compensation from federal medical centers for veterans and service members in Utah increased by 3%.

Veterans

The National Center for Veterans Analysis and Statistics estimated 134,313 veterans lived in Utah in 2017 (the most recent data available), 17,398 of whom were military retirees. The largest numbers of veterans were in Salt Lake, Davis, Utah, and Weber counties. Retirees are concentrated in Davis, Salt Lake, and Weber counties, with relatively strong presences in Utah and Washington counties too. By 2045, the veteran population is expected to decline to 100,000 individuals.

Contracts and Grants

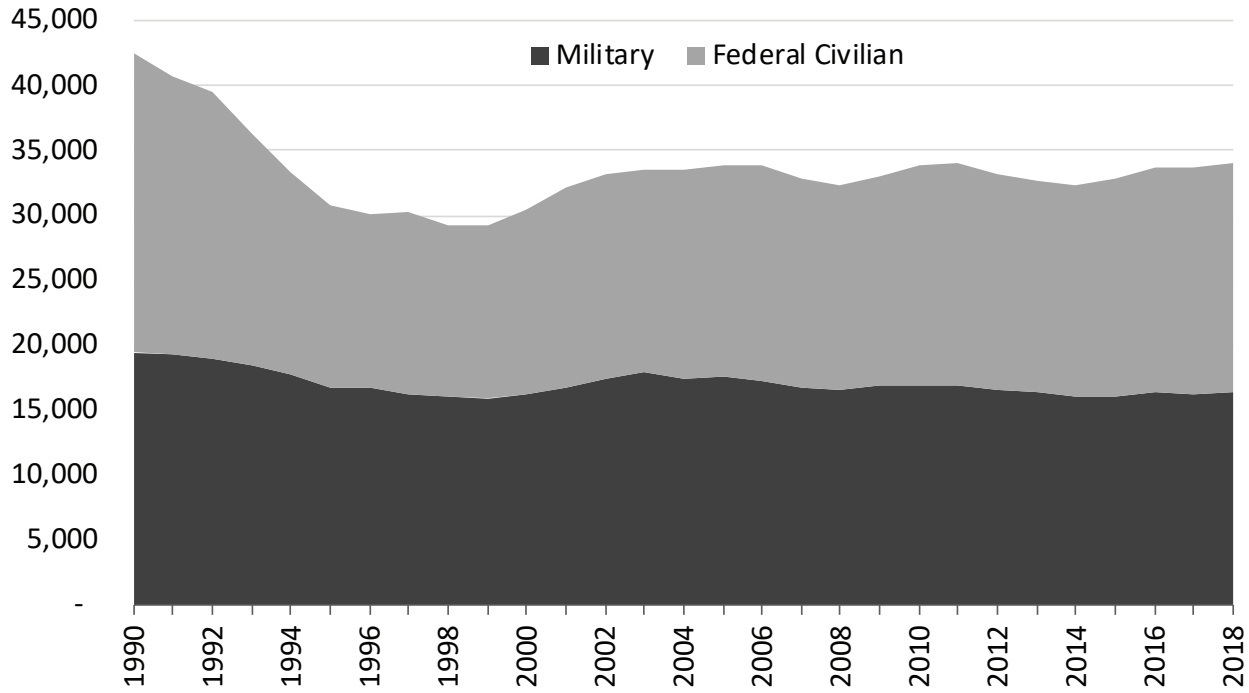
At $1.8 billion in FY 2018, the total value of DOD and VA contracts and grants in Utah have been following an uneven decline since peaking at $3.9 billion in 2007. Annual amounts vary considerably, driven primarily by changes in DOD contracting levels. Even though this fluctuates from year to year, DOD contracting consistently makes up about 91% of total contracts and grants from both DOD and the VA to Utah organizations.

The annual value of VA grants in Utah barely exceeded $2 million from 2000 to 2009. Since 2010, however, amounts have ranged from $11 million to $37 million (with 2016 as an exception). Possible reasons for the increase include VA funding changes favoring grants, incomplete data for earlier years, and actual increases in patient care, research and other activity in Utah supported by VA grants.

2020 OUTLOOK

Defense supports many high paying quality jobs in Utah, and nearly two billion in federal contracts and grants. However, recent history shows a declining trend for both total defense employment and contract and grants. While we expect this trend to continue through the end of 2020, the growth in depot maintenance work associated with procurement and fielding of additional F-35 aircraft, award of the $80 billion Ground Based Strategic Deterrent (GBSD) contract in late 2020, and continued growth in software work are anticipated to add 2,500 mostly federal civilian jobs to the Hill AFB workforce over the next five years. Further, with the GBSD contract being managed at Hill, defense contractors are already relocating to the community around the base which will increase the value of Utah's DoD contracts over that period and beyond.

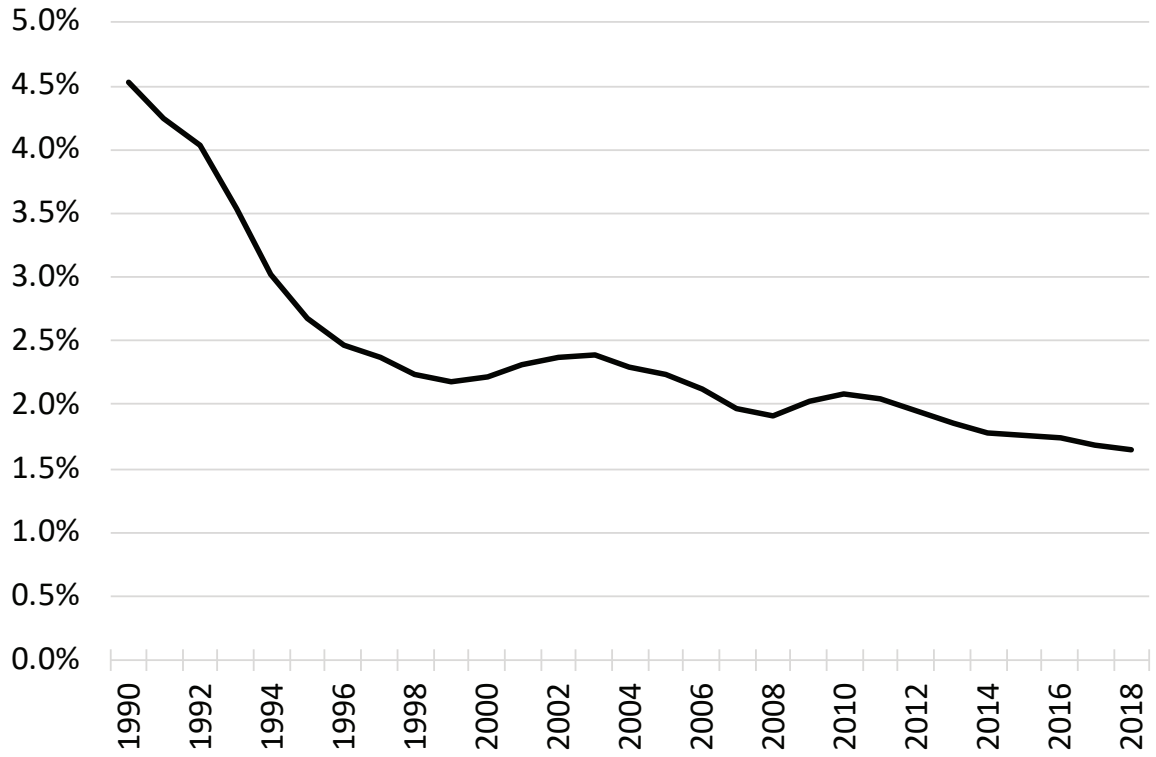
Figure 20.1: Military and Federal Civilian Defense Employment in Utah, 1990–2018



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

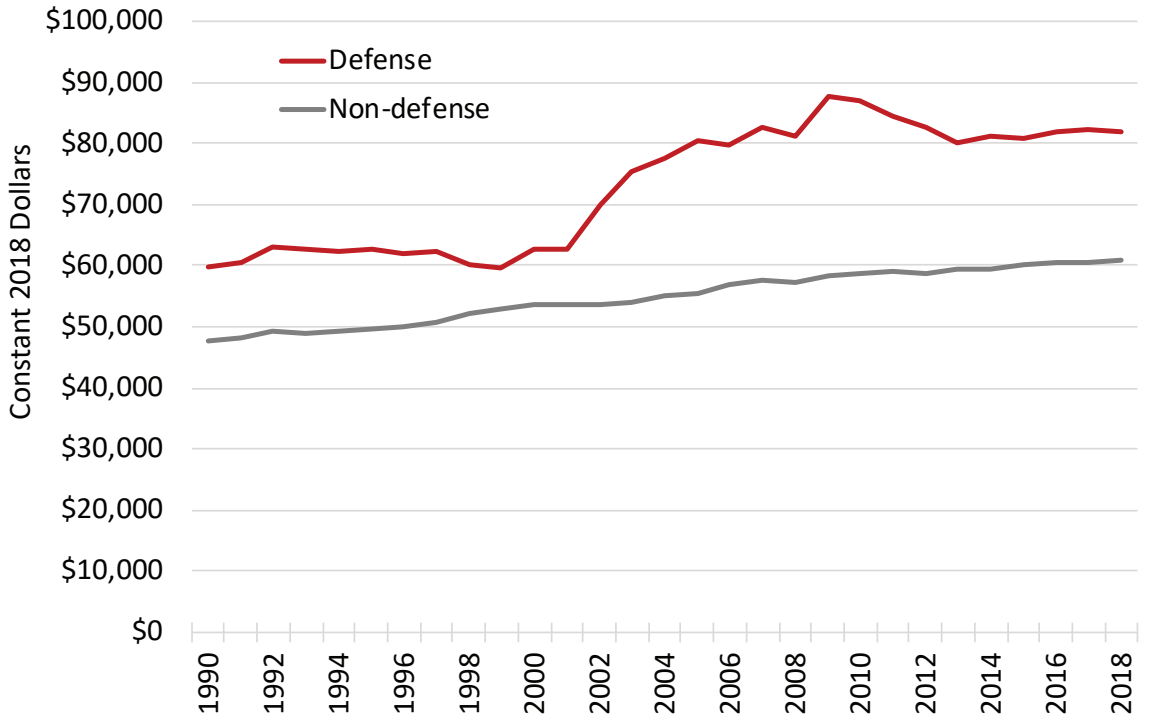
Source: Bureau of Economic Analysis, Bureau of Labor Statistics.

Figure 20.2: Defense Share of Total Employment in Utah, 1990–2018



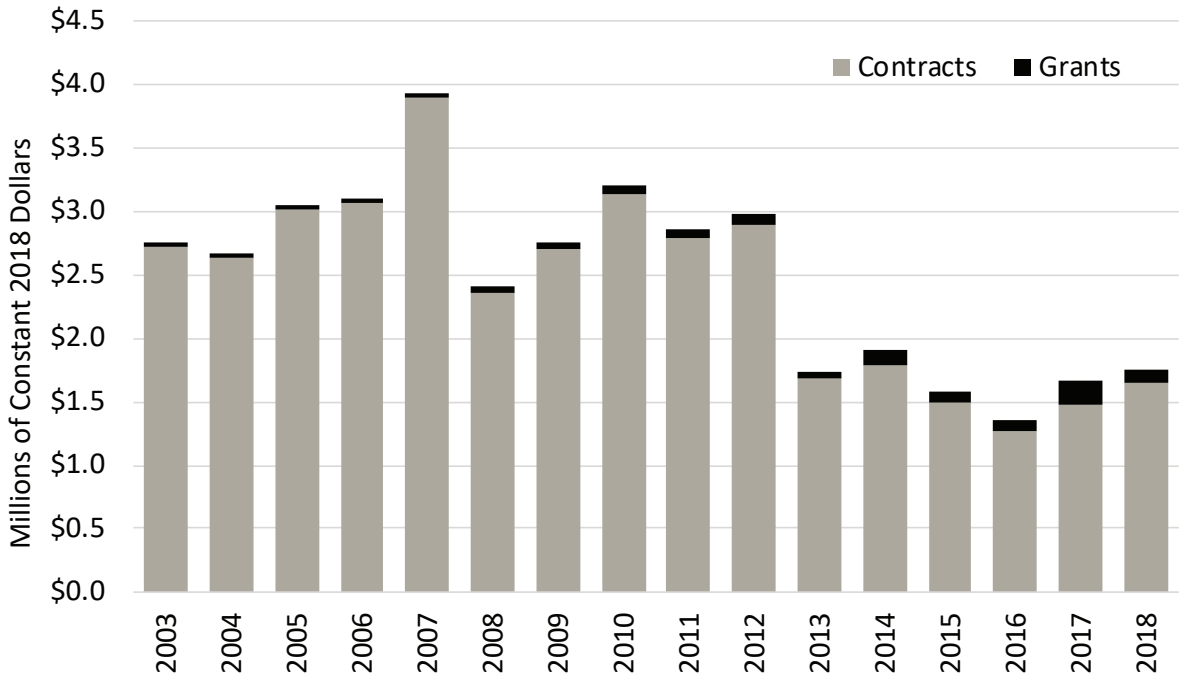
Source: Bureau of Economic Analysis, Bureau of Labor Statistics.

Figure 20.3: Compensation per Utah Job, Defense vs. Non-Defense, 1990–2018



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

Figure 20.4: Total DoD and VA Prime Contracts and Grants Performed in Utah, 2003–2018



Note: Amounts include dollars obligated each federal fiscal year for prime awards for contracts and grants funded by the U.S. Department of Defense (DoD) and U.S. Department of Veterans Affairs (VA) for which Utah was given as the primary place of performance. All amounts are in constant 2018 dollars.

Source: USAspending.gov by the U.S. Department of Treasury.

Table 20.1: Defense Employment and Compensation in Utah, Selected Years 1990–2018

	Employment				Compensation			
Year	Military	Federal Civilian	Total Defense	Share of All Utah Jobs	Military	Federal Civilian	Total Defense	Share of Utah Compensation
1990	**19,399**	**23,075**	**42,474**	**4.5%**	**$751.0**	**$1,785.2**	**$2,536.2**	**6.8%**
1991	19,336	21,387	40,723	4.2%	$765.8	$1,705.0	$2,470.8	6.4%
1992	18,938	20,619	39,557	4.0%	$766.5	$1,734.7	$2,501.2	6.2%
1993	18,406	17,850	36,256	3.5%	$710.7	$1,569.2	$2,279.9	5.4%
1994	17,748	15,570	33,318	3.0%	$683.1	$1,399.2	$2,082.3	4.6%
1995	**16,695**	**14,134**	**30,829**	**2.7%**	**$656.2**	**$1,276.2**	**$1,932.4**	**4.0%**
1996	16,676	13,472	30,148	2.5%	$669.8	$1,196.1	$1,865.9	3.7%
1997	16,261	13,975	30,236	2.4%	$649.1	$1,233.2	$1,882.3	3.6%
1998	16,033	13,277	29,310	2.2%	$528.1	$1,234.7	$1,762.8	3.1%
1999	15,922	13,354	29,276	2.2%	$536.4	$1,209.8	$1,746.2	3.0%
2000	**16,222**	**14,291**	**30,513**	**2.2%**	**$555.3**	**$1,352.8**	**$1,908.0**	**3.2%**
2001	16,761	15,432	32,193	2.3%	$594.3	$1,429.3	$2,023.6	3.3%
2002	17,334	15,881	33,215	2.4%	$756.8	$1,565.0	$2,321.9	3.8%
2003	17,918	15,672	33,590	2.4%	$938.3	$1,590.8	$2,529.1	4.1%
2004	17,500	15,929	33,429	2.3%	$953.1	$1,634.7	$2,587.9	4.0%
2005	**17,608**	**16,288**	**33,896**	**2.2%**	**$1,030.5**	**$1,692.8**	**$2,723.3**	**4.0%**
2006	17,326	16,520	33,846	2.1%	$963.4	$1,736.3	$2,699.8	3.7%
2007	16,768	16,127	32,895	2.0%	$933.2	$1,781.5	$2,714.7	3.6%
2008	16,540	15,694	32,234	1.9%	$940.9	$1,672.8	$2,613.8	3.5%
2009	16,959	16,123	33,082	2.0%	$1,034.5	$1,867.0	$2,901.5	4.0%
2010	**16,886**	**16,933**	**33,819**	**2.1%**	**$1,024.6**	**$1,921.8**	**$2,946.4**	**4.0%**
2011	16,896	17,165	34,061	2.0%	$947.3	$1,935.0	$2,882.3	3.8%
2012	16,570	16,612	33,182	1.9%	$890.2	$1,850.9	$2,741.1	3.5%
2013	16,432	16,221	32,653	1.9%	$852.8	$1,761.1	$2,613.9	3.3%
2014	16,074	16,175	32,249	1.8%	$800.3	$1,821.6	$2,621.9	3.2%
2015	**16,099**	**16,653**	**32,752**	**1.8%**	**$770.6**	**$1,875.0**	**$2,645.6**	**3.0%**
2016	16,314	17,347	33,661	1.7%	$798.7	$1,958.2	$2,756.9	3.0%
2017	16,195	17,484	33,679	1.7%	$779.8	$1,994.0	$2,773.8	3.0%
2018	**16,329**	**17,636**	**33,965**	**1.6%**	**$811.7**	**$1,968.6**	**$2,780.3**	**2.9%**

Note: Source: Federal defense employment includes the military, whether active-duty employment or part-time employment in reserve or National Guard units. It also includes federal civilian employment for national security and medical care provided by the VA and DOD. All dollars are in millions of constant 2018 dollars.
Source: Source: Bureau of Economic Analysis, Bureau of Labor Statistics.

Table 20.2: Total DoD and VA Prime Contracts and Grants Performed in Utah, 2003–2018

Fiscal Year	Contracts			Grants			Contracts & Grants			DoD contracts share
	DoD	VA	Total	DoD	VA	Total	DoD	VA	Total	
2003	$2,660.2	$58.4	$2,718.6	$28.3	$2.2	$30.5	$2,688.5	$60.6	$2,749.1	97%
2004	$2,584.9	$42.6	$2,627.5	$33.9	$2.3	$36.2	$2,618.8	$44.8	$2,663.7	97%
2005	$2,927.5	$80.6	$3,008.1	$38.0	$2.2	$40.2	$2,965.5	$82.8	$3,048.3	96%
2006	$3,000.7	$65.2	$3,066.0	$27.4	$2.3	$29.7	$3,028.2	$67.5	$3,095.7	97%
2007	$3,822.4	$75.6	$3,898.0	$34.8	$0.0	$34.8	$3,857.1	$75.6	$3,932.8	97%
2008	$2,286.1	$69.0	$2,355.1	$51.4	$0.1	$51.5	$2,337.4	$69.2	$2,406.6	95%
2009	$2,592.2	$108.0	$2,700.2	$56.1	$0.0	$56.1	$2,648.3	$108.0	$2,756.3	94%
2010	$3,011.2	$125.6	$3,136.8	$51.8	$17.9	$69.8	$3,063.1	$143.6	$3,206.6	94%
2011	$2,668.5	$116.5	$2,785.0	$70.2	$11.2	$81.4	$2,738.7	$127.7	$2,866.4	93%
2012	$2,794.2	$101.8	$2,896.0	$50.8	$37.3	$88.1	$2,844.9	$139.1	$2,984.1	94%
2013	$1,588.6	$92.9	$1,681.5	$44.2	$12.9	$57.1	$1,632.8	$105.8	$1,738.6	91%
2014	$1,690.1	$97.3	$1,787.3	$96.3	$20.4	$116.7	$1,786.3	$117.7	$1,904.0	89%
2015	$1,408.0	$90.2	$1,498.2	$60.2	$28.8	$88.9	$1,468.2	$119.0	$1,587.2	89%
2016	$1,168.5	$105.5	$1,274.0	$72.1	$2.0	$74.1	$1,240.6	$107.5	$1,348.1	87%
2017	$1,402.5	$65.6	$1,468.1	$160.1	$29.5	$189.7	$1,562.6	$95.1	$1,657.7	85%
2018	$1,587.4	$66.0	$1,653.3	$71.6	$26.3	$97.8	$1,658.9	$92.2	$1,751.2	91%

Note: Amounts include dollars obligated each federal fiscal year for prime awards for contracts and grants funded by the U.S. Department of Defense (DoD) and U.S. Department of Veterans Affairs (VA) for which Utah was given as the primary place of performance. All dollars are in millions of constant 2018 dollars.
Source: USAspending.gov by the U.S. Department of Treasury.

Health Care

21

Laura Summers, Kem C. Gardner Policy Institute

2019 OVERVIEW

Utah ranked as the fifth healthiest state in 2019 according to America's Health Rankings.[1] This is an improvement from eighth in 2016, but lower than the 1990s when Utah consistently ranked first. The top four states include Vermont, Massachusetts, Hawaii, and Connecticut.

Health Outcomes

Measures that influence Utah's positive ranking include: (1) high levels of physical activity among Utah adults, (2) a low percentage of children in poverty, and (3) a low death rate from cancer. Utah also has the lowest percentage of adults who smoke and engage in excessive drinking, a low percentage of adults with diabetes, and the second lowest rate of preventable hospitalizations in the country.

Measures that negatively influence Utah's ranking include: (1) a low number of primary care physicians per 100,000 population, (2) low child and adolescent immunization rates, and (3) a large difference in health outcomes when segmenting the population by high school education. Additional measures where Utah ranks poorly when compared to other states include high levels of air pollution, a high incidence of new cases of pertussis or whooping cough, and a high rate of deaths due to drug injury of any intent (unintentional, suicide, homicide, or undetermined).

To address some of these issues, the Utah Department of Health (UDOH) identified three priority areas for improvement in 2017-2020: (1) reducing obesity and obesity-related chronic conditions, (2) reducing prescription drug misuse, abuse, and overdose, and (3) improving mental health and reducing suicide.[2]

Obesity

Utah has a relatively low percentage of adults who are obese compared to other states (Utah ranks 10th in America's Health Rankings). However, the percentage has been steadily increasing since the 1990s.

The percentage of Utah's youth who are overweight or obese mirrors this trend, with the total percent of Utah high school students who are overweight or obese increasing from 14.2% in 1999 to 22.8% in 2017. Boys are more almost one and a half times as likely as girls to be overweight or obese (26.7% vs. 18.9%).

Drug Misuse, Abuse, and Overdose

While Utah has long experienced high rates of drug-related deaths, the state's opioid death rate decreased in 2017 (13.5 per 100,000, 2018 is TBD). This is the first time Utah's opioid death rate has dipped below the national average (14.3) since 1999.[3] Part of this decrease is due to a reduction in the number of Utah deaths related to prescription opioids (falling from 302 in 2014, to 247 in 2017, and 274 in 2018).[4]

Although the state is experiencing a decrease in opioid-related deaths, the death rate from methamphetamine is increasing, and data from the Centers for Disease Control and Prevention (CDC) indicate meth was a major cause of overdose deaths in Utah and most western states in 2017.[5] In 2018, Utah's age-adjusted number of drug-related deaths was 21.2 per 100,000 population. More than 80% of these deaths were unintentional.[6]

Suicide and Mental Health

Utah has one of the highest suicide rates in the country (Utah ranked fifth highest in 2018). Suicide is the leading cause of death for Utahns ages 10–17. It is the second leading cause of death for ages 18–44 and the fifth-leading cause of death for ages 45–64.[7] Data show that 14.9% of males and 28.5% of

1 America's Health Rankings Annual Report, 2019 Edition. ©2019 United Health Foundation.
2 Utah Health Status Update: The Utah Health Improvement Plan Implementation Process. (2019, May). UDOH.
3 Ibid.
4 Health Indicator Report of Drug Overdose and Poisoning Incidents. (2019, Nov). UDOH.
5 National Center for Health Statistics.
6 Health Indicator Report of Drug Overdose and Poisoning Incidents. (2019, Nov). UDOH.
7 Health Indicator Report of Suicide. (2019, Nov). UDOH.

females in high school seriously considered attempting suicide in 2017.[8]

Similar to its low number of primary care physicians, Utah experiences mental health provider shortages in all of its counties. However, America's Health Rankings shows these numbers are improving. Mental health providers increased from 293.4 to 335.5 per 100,000 population in the latest available data.

Current Health Care Concerns

In addition to improving Utah's obesity, drug death, and suicide rates, Utah is also focused on addressing the vaping epidemic and the number of Electronic Vaping Associated Lung Injuries (EVALI) in the state. As of December 10, 2019, 2,409 hospitalized EVALI cases were reported to the CDC from all 50 states, D.C., Puerto Rico, and the U.S. Virgin Islands.[9] Utah has experienced a proportionally high number of lung injuries across the state, with over 100 reported cases.

The state is also concerned with reducing the number of youth using electronic cigarettes or vaping. Use of electronic cigarettes and other vape products has grown significantly among Utah youth.[10] Experimentation rates were as high as 31.5% among Utah's 12th graders in 2019.

Health Insurance

The majority of Utahns receive health care coverage through their employers and Utah has the highest rate of employer-sponsored insurance (ESI) in the nation (more than 61.0% of Utahns have ESI compared to the national average of 49.0%).[11] That said, the purchase of health savings account (HSA)-qualified high-deductible health plans (HDHPs) in Utah has also significantly increased since the mid-2000s.

In 2018, HSA-qualified HDHPs comprised 34.1% of Utah's commercial health insurance market, compared to only 3.0% in 2007. They make up 38.4% of Utah's large group market (defined as employers with 51 or more employees), 38.9% of the state's small group market, and 23.0% of health plans purchased in the individual market.[12]

HDHPs have lower monthly premiums, but higher deductibles, requiring individuals and families to pay more in out-of-pocket costs before their health insurance begins to cover qualifying expenses. Utah, like the rest of the country, has also experienced increases in the cost of health insurance over the last decade.

When adjusting for inflation, Utah's median family income was relatively stagnant between 2006 and 2017 with an average annual growth rate of 0.5%. The cost of health insurance premiums for family plans, and deductibles for both family and individual health plans, rose at an average annual rate more than five times the rate of family income during this same period.

Utah's health care expenditures are also growing at one of the fastest rates in the country.[13] This increase is likely due to the state's rapid population growth, but could also reflect rising costs of health care and an increase in health care utilization rates. From 1991 to 2014, the fastest growing expenditures in Utah were in home health care and prescription drugs (including medical nondurable products).

Urban/Rural Differences

Different population groups have different health care needs, but the severity of these needs vary based on individuals' genetics, behaviors, environment, access to health care, and socioeconomic status. For example, Utah data show that in 2018, 34.0% of low-income adults (with income less than $25,000 per year) report having fair or poor health, compared to only 7.1% of adults with annual income more than $75,000.[14]

Income levels and access to health care differ considerably across Utah and data show an urban-rural divide on key economic indicators and health care outcomes. While Utah's uninsured rate is relatively low compared to other states that have not expanded Medicaid (Utah did not expand Medicaid until April 1, 2019), this low uninsured rate is not consistent throughout the state. Utah's 2017 uninsured rates for persons under age 65 range from a low of 7.0% in Davis County to a high of 17.0% in San Juan County.

8 Ibid.
9 Outbreak of Lung Injury Associated with the Use of E-Cigarette, or Vaping, Products. (2019, Dec.). CDC.
10 Health Indicator Report of Electronic Cigarettes / Vape Products. (2018, Nov). UDOH.
11 Kaiser Family Foundation estimates based on the Census Bureau's American Community Survey, 2008-2018.
12 Hawley, J. (2019, December). 2019 Health Insurance Market Report, State of Utah Insurance Department.
13 National Health Expenditure Data: Health Expenditures by State of Provider. (2017, June). CMS, Office of the Actuary, National Health Statistics Group.
14 Behavioral Risk Factor Surveillance System, Office of Public Health Assessment, UDOH.

These differences exist at the neighborhood level as well. Using life expectancy as a proxy, one can see the disparities that exist in health and wellbeing among Utah's neighborhoods. Data show that there is a more than a 10-year difference in life expectancy between Utah's neighborhoods with the longest life expectancy (the Avenues and Foothill) and the shortest life expectancy (South Salt Lake). This is despite there only being about a five mile difference between these areas. Life expectancy for the state as a whole is 79.8 years and the national average is 78.6.

2020 OUTLOOK

Health care changes are on the horizon for Utah as it moves into 2020, including the implementation of two programs that were approved by Utah voters in the November 2018 election: (1) Medicaid expansion, and (2) a medical cannabis program.

Medicaid Expansion

On April 1, 2019, the Centers for Medicare and Medicaid Services (CMS) approved Utah's application to expand its Medicaid program to parents and adults without dependent children earning up to 100% of the federal poverty level (FPL). This equates to $12,492 for an individual or $25,752 for a family of four. This expansion, known as the "Bridge Plan" utilizes the state's current federal match rate of 68.2%, meaning the federal government pays about 68 cents of every dollar Utah spends on Medicaid.

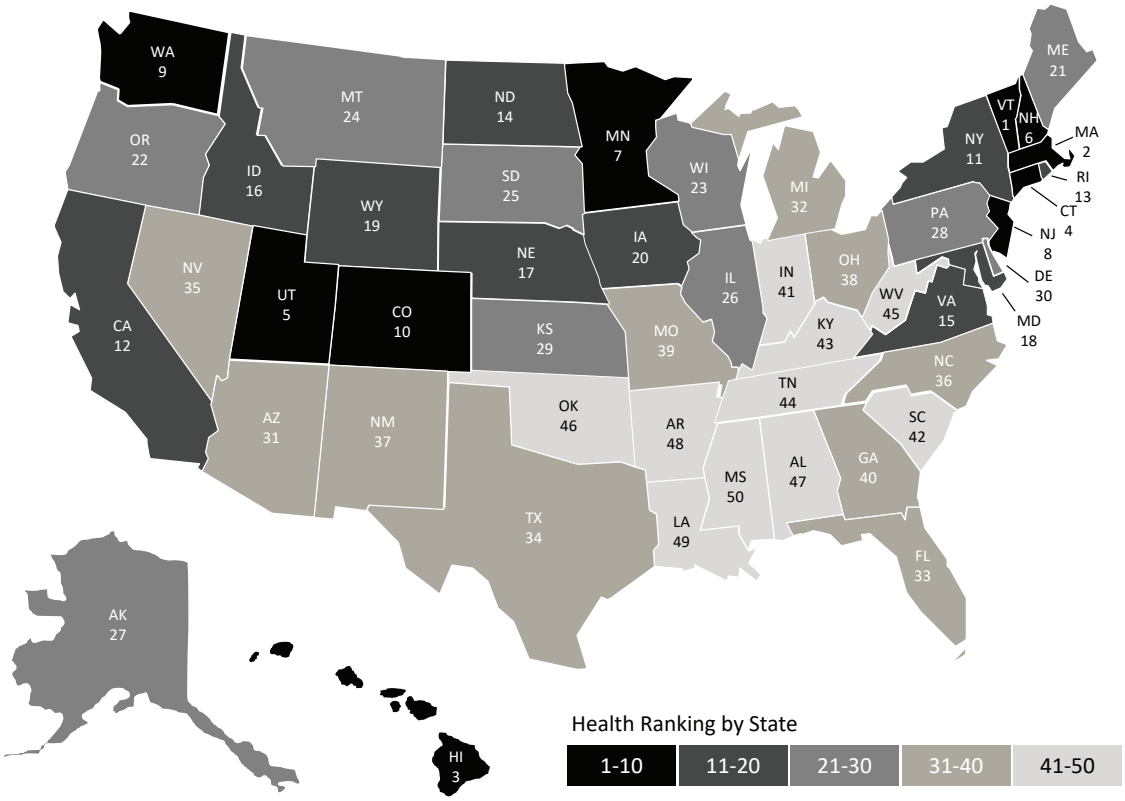
On November 1, 2019, UDOH submitted another waiver application to CMS (i.e., the "Fallback Plan"), asking to expand adult Medicaid eligibility to 138% FPL and obtain a 90% federal/10% state match rate. The Fallback Plan includes a self-sufficiency or work requirement, an enrollment cap, mandatory employer-sponsored insurance enrollment for those who qualify, a lock-out period for intentional program violations, premiums for higher income adults, 12-month continuous eligibility for select groups, and housing supports for select groups. Key provisions of the Fall Back plan were approved by CMS in late December, allowing for program implementation starting in January 2020.

Medical Cannabis

The Utah Medical Cannabis Act directs UDOH to register medical providers who choose to recommend medical cannabis treatment for their patients, issue medical cannabis cards to patients with qualifying conditions, and license privately-operated medical cannabis pharmacies. Utah's medical cannabis program must be implemented by March 1, 2020.

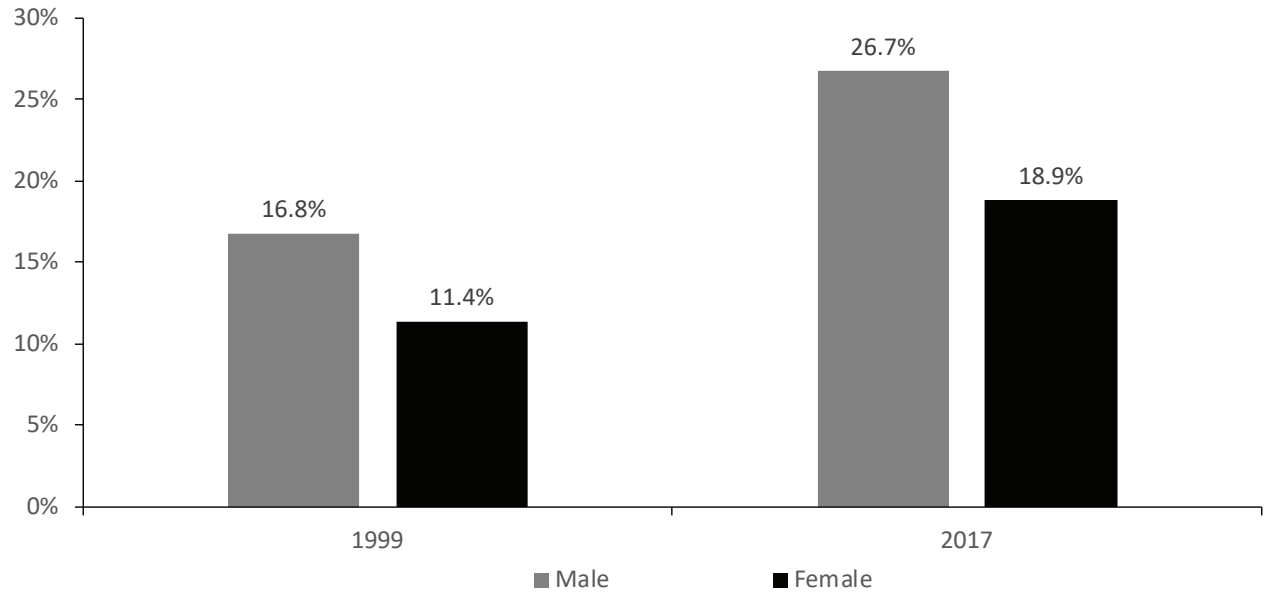
Under the program, registered providers may issue recommendation letters for medical marijuana on a case-by-case basis to patients who are evaluated by the provider, diagnosed with a qualifying condition, and determined to benefit from medical cannabis treatment. Patients with medical conditions not included in the list of qualifying conditions may petition the Utah's Compassionate Use Board for a medical cannabis card. This Board will review petitions and determine eligibility on an individual basis.

Figure 21.1: America's Health Rankings, 2019



Source: America's Health Rankings Annual Report, 2019 Edition. ©2019 United Health Foundation.

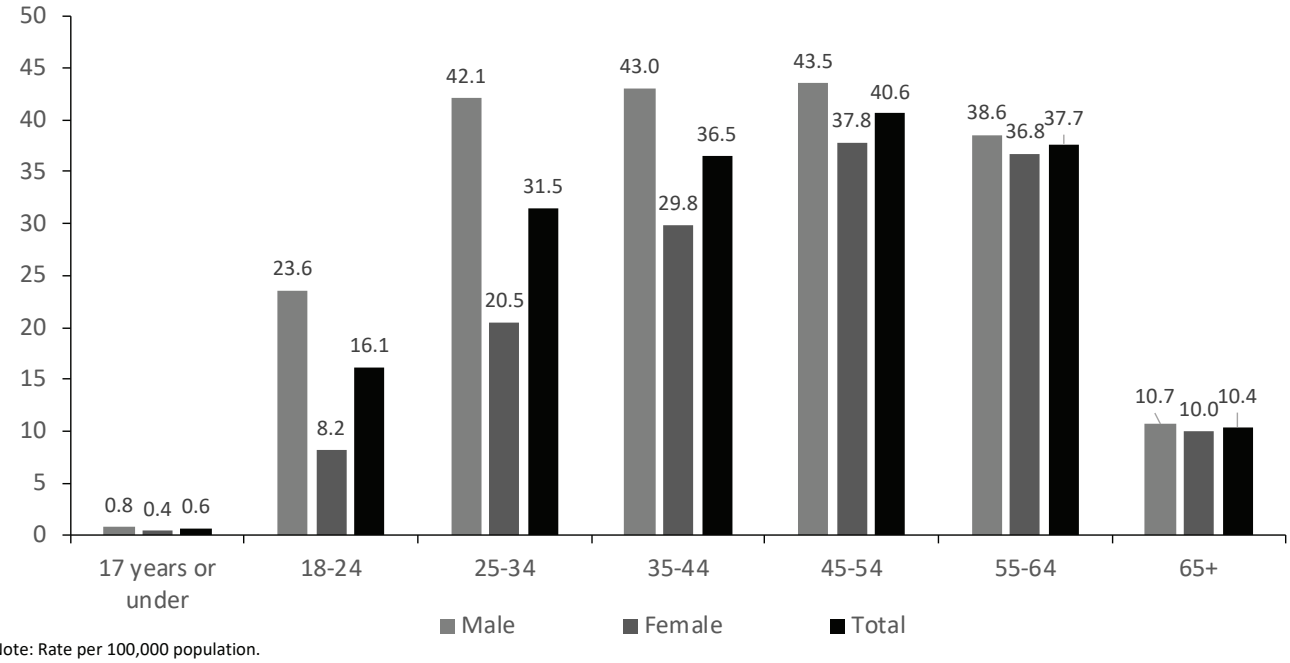
Figure 21.2: Percent of Utah Students Grades 9-12 who are Overweight or Obese, 1999 vs. 2017



Note: Overweight or Obese is defined as at or above the 85th percentile for Body Mass Index. Data are self-reported. Comparisons of annual rates must be interpreted cautiously as methods used to collect YRBS data may vary from year to year.

Source: Utah Youth Risk Behavior Surveillance System, Utah State Office of Education.

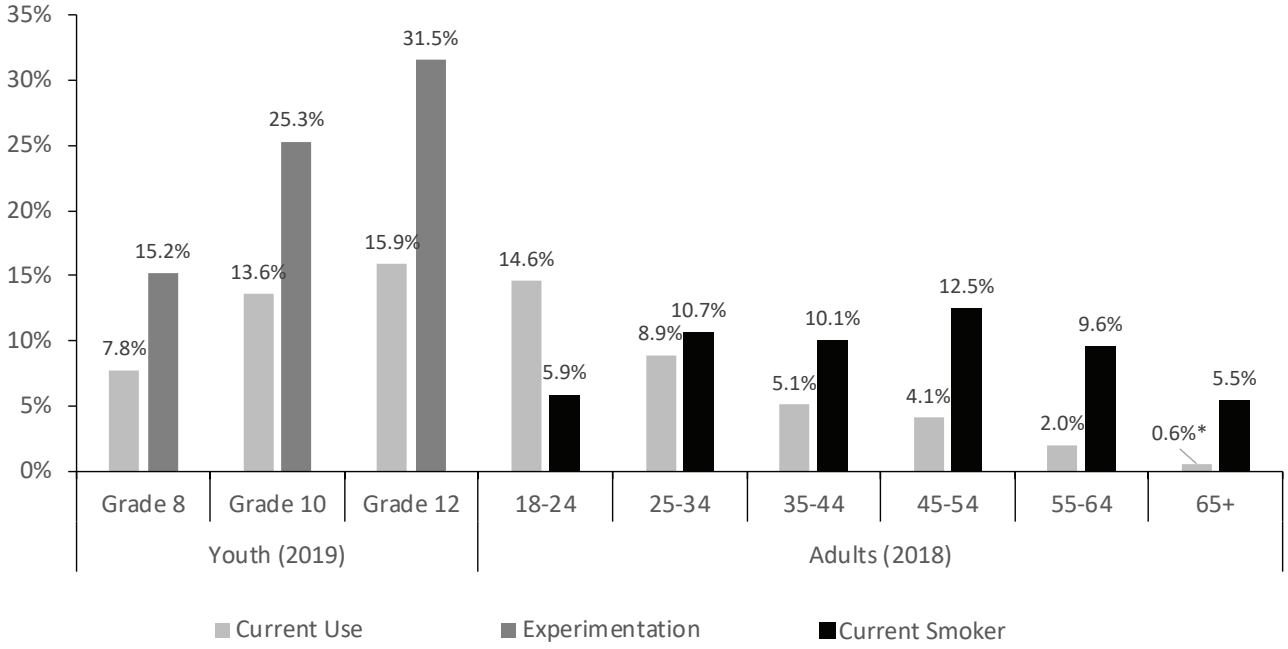
Figure 21.3: Rate of Utah Drug Deaths by Age and Sex, 2016-2018 Average



Note: Rate per 100,000 population.

Source: Utah Death Certificate Database, Office of Vital Records and Statistics, Utah Department of Health. Population Estimates: National Center for Health Statistics (NCHS) through a collaborative agreement with the U.S. Census Bureau, IBIS Version 2017.

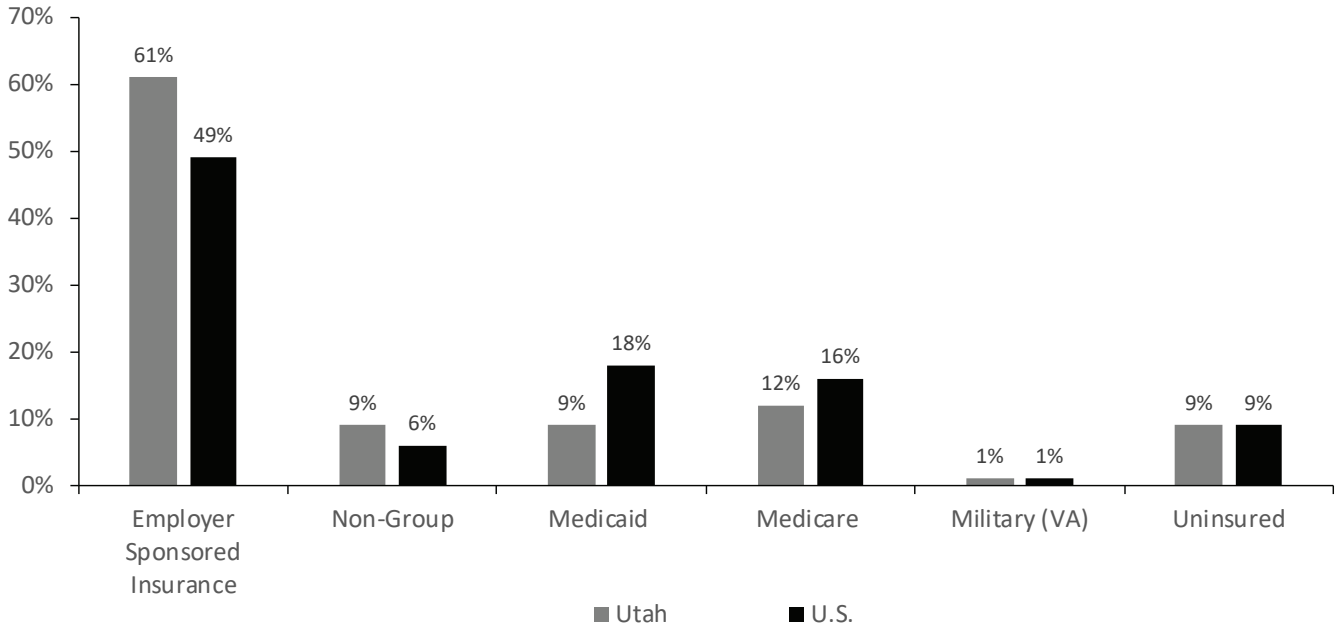
Figure 21.4: Electronic Cigarette Use and Experimentation in Utah by Grade and Age, 2018 & 2019



Note: Experimentation is defined as "ever tried"; current use is defined as use in the past 30 days. Current smoker is defined as currently using "every day" or "some days."
*Use caution in interpreting; the estimate has a coefficient of variation > 30% and is therefore deemed unreliable by Utah Department of Health standards.

Source: Utah Prevention Needs Assessment Survey. Utah Behavioral Risk Factor Surveillance System, Office of Public Health Assessment, Utah Department of Health.

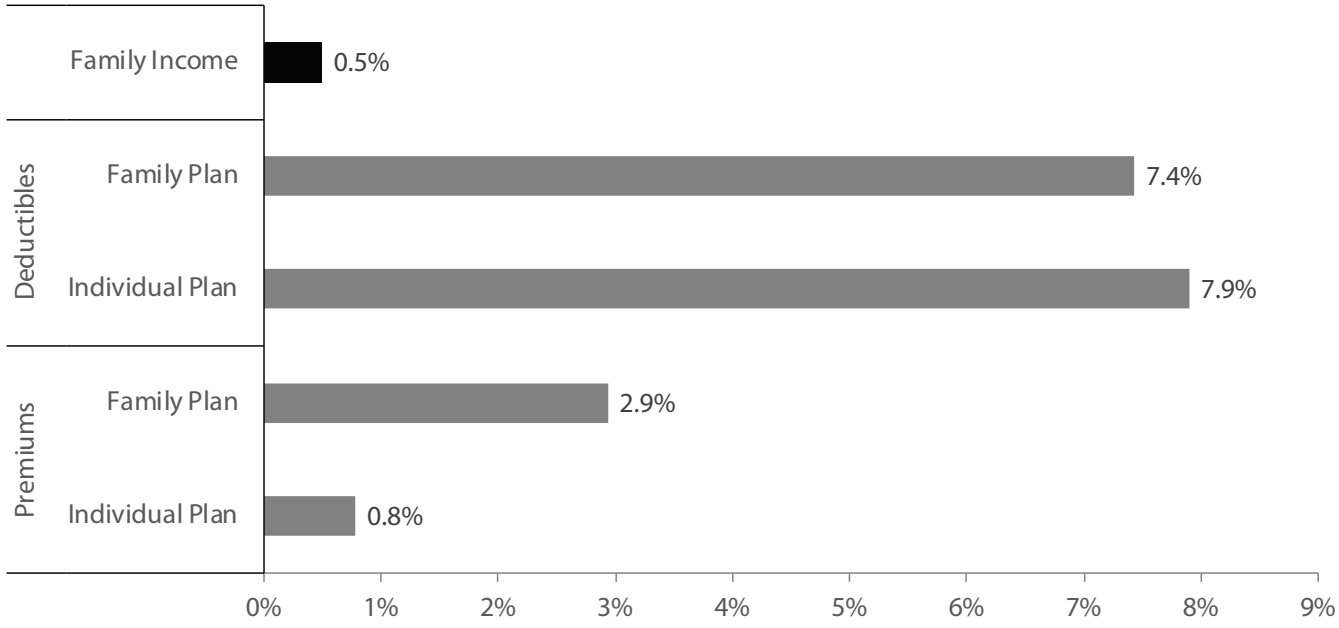
Figure 21.5: Percent of Utah's Population with Health Insurance by Coverage Type, 2018



Note: Data may not sum to totals due to rounding. Data may differ from estimates in Tables 21.2 and 21.3 due to different data sources.

Source: Kaiser Family Foundation estimates based on the Census Bureau's American Community Survey, 2008-2018.

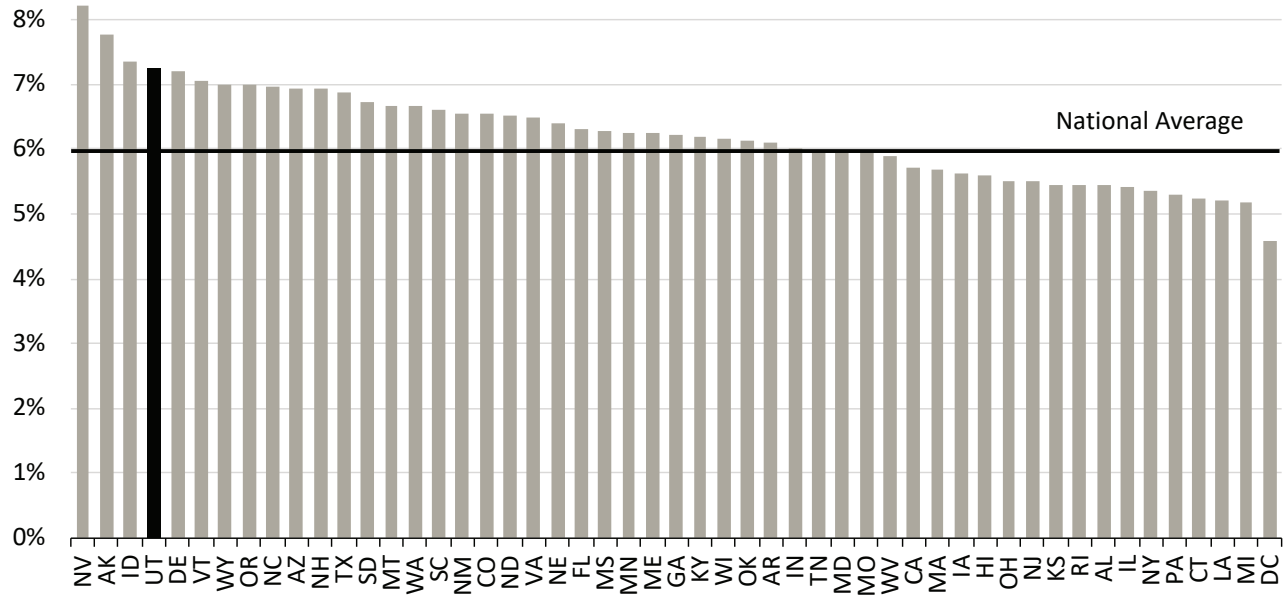
Figure 21.6: Average Annual Growth in Utah's Family Income Compared to Health Insurance Costs, 2006-2017



Note: Income is median family income. Premiums and deductibles represent average employee contributions and deductibles for private-sector employees enrolled in single and family coverage. Inflation-adjusted (2017).

Source: Kem C. Gardner Policy Institute analysis of Medical Expenditure Panel Survey data and Census Bureau, Current Population Survey data.

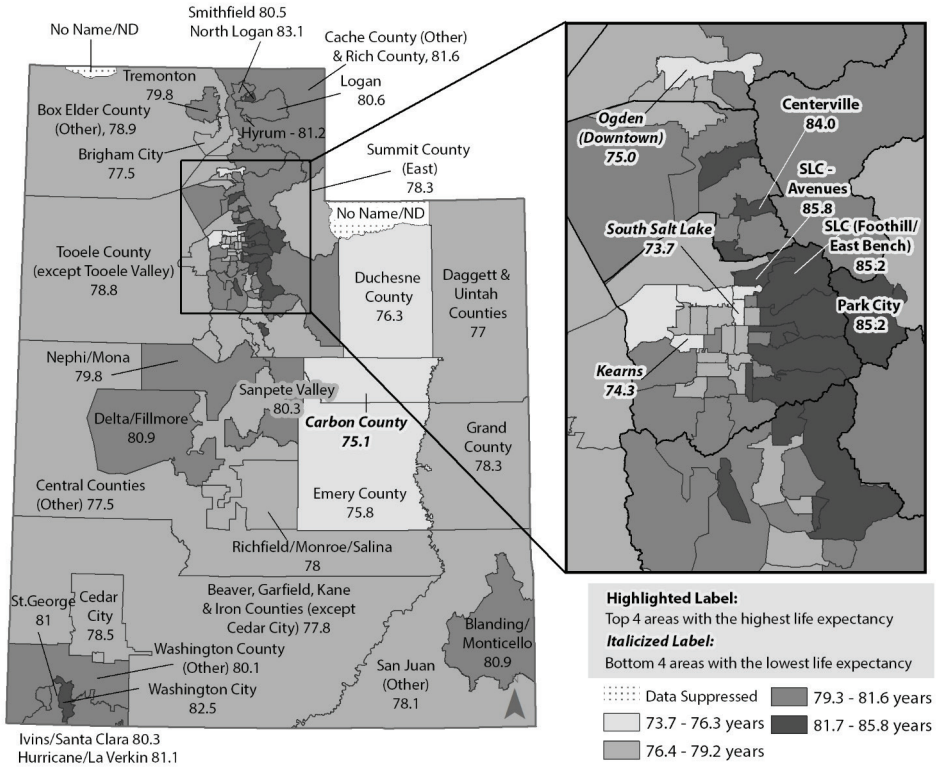
Figure 21.7: Average Annual Percent Growth in Health Care Expenditures, 1991-2014



Note: Health care expenditures includes spending for all privately and publicly funded personal health care services and products.

Source: Centers for Medicare & Medicaid Services, Office of the Actuary, National Health Statistics Group. National Health Expenditure Data: Health Expenditures by State of Provider, June 2017.

Figure 21.8: Life Expectancy by Utah Small Area, 2014-2018 Average



Note: Life expectancy can be used to gauge the overall health of a community. Population estimates produced by the UDOH Center for Health Data and Informatics. Linear interpolation of U.S. Census Bureau and ESRI ZIP Code data provided annual population estimates for ZIP Code areas by sex and age groups, IBIS Version 2018.

Source: Utah Death Certificate Database, Office of Vital Records and Statistics, Utah Department of Health. National Center for Health Statistics.

Table 21.1: Percent of Common Diseases Among Utah Adults Age 18 Years and Older, 2011-2018

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

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

Table 21.2: Percent of Utah's Population with Health Insurance by Coverage Type, 2007-2018

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

Note: The 2017 employer sponsored self-funded membership estimate is based on limited data from commercial insurers and employers. It is not a complete count of the self-funded membership in Utah and should be used with caution. Estimates may not total exactly due to rounding and differences in methodology.
PCN (Primary Care Network) PCN is a limited benefit health plan offered by the Utah Department of Health to adults who are not traditionally eligible for Medicaid.
HIP Utah (Utah Comprehensive Health Insurance Pool) was discontinued in 2014 with the Affordable Care Act.
Data may differ from estimates in Figure 21.5 and Table 21.3 due to different data sources.
Source: State of Utah Health Insurance Market Reports.

Table 21.3: Percent Uninsured by County in Utah, 2006-2017

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

Note: Uninsured rate is for those age 65 and younger.
Data may differ from estimates in Figure 21.5 and Table 21.2 due to different data sources.
Source: U.S. Census Bureau Small Area Health Insurance Estimates.

Table 21.4: Utah's Private Sector Health Care Employment by Facility Type, 2001-2018

	Provider Offices					Mental Health Provider Offices				Medical Services				Medical Facilities			Hospitals			
Year	Physicians	Dentists	Chiropractors	Podiatrists	Optometrists	Mental Health Physicians	Mental Health Practitioners	Specialty Therapists	Miscellaneous Health Practitioner Offices	Outpatient Care Centers	Medical and Diagnostic Laboratories	Home Health Care Services	Other Ambulatory Health Care Services	Skilled Nursing Care Facilities	Residential Mental Health Facilities	Assisted Living Facilities	General Medical and Surgical Hospitals	Psychiatric and Substance Use Disorder Hospitals	Other Specialty Hospitals	Health and Medical Insurance Carriers
2001	12,046	7,779	898	209	506	138	358	1,578	298	1,428	1,864	2,953	927	8,474	3,984	2,440	22,655	NA	NA	2,713
2002	12,555	8,098	1,011	228	505	133	374	1,722	316	1,619	2,039	3,239	958	8,411	4,329	2,608	23,201	NA	NA	2,673
2003	13,301	8,459	1,040	242	525	136	369	1,775	378	1,471	2,175	3,647	908	8,482	4,586	2,804	24,156	536	2,954	2,529
2004	13,793	8,708	1,030	257	545	149	406	1,864	414	1,688	2,410	3,960	861	8,689	4,853	3,113	24,693	596	2,992	2,456
2005	14,446	8,981	1,052	256	573	148	434	1,976	500	1,902	2,491	4,161	916	8,825	5,143	3,286	25,400	NA	NA	2,443
2006	16,416	9,431	1,051	273	618	138	446	1,985	586	2,189	2,621	4,564	1,017	8,770	5,503	3,454	24,961	554	3,147	2,268
2007	17,393	9,800	1,097	287	647	117	449	1,989	726	2,315	2,800	4,693	1,093	8,870	5,950	3,583	25,808	539	3,314	2,490
2008	18,551	10,109	1,099	284	690	123	482	2,084	822	2,486	3,080	5,005	1,272	9,350	6,214	3,813	26,822	526	3,538	2,501
2009	19,140	10,408	1,123	292	726	127	523	2,157	868	2,432	3,251	5,595	1,350	9,331	6,444	4,257	27,346	428	3,646	2,437
2010	19,624	10,676	1,123	299	751	148	541	2,308	875	2,546	3,515	5,804	1,248	9,412	6,291	4,457	27,910	474	3,631	2,280
2011	19,800	10,976	1,189	286	766	174	571	2,503	1,052	2,569	3,546	6,344	1,327	9,382	6,486	4,664	28,389	668	3,569	2,359
2012	20,213	11,272	1,246	294	804	197	635	2,568	971	2,726	3,483	6,826	1,625	9,262	6,787	4,888	29,027	727	3,521	2,501
2013	20,515	11,527	1,303	298	868	217	686	2,696	985	2,789	3,543	7,339	1,832	9,194	7,016	5,264	29,528	702	3,645	2,735
2014	19,660	11,737	1,376	288	915	336	774	2,890	1,154	3,097	3,621	7,485	2,024	9,404	7,399	5,466	29,728	697	3,800	2,839
2015	20,123	12,116	1,397	303	959	360	837	2,970	1,316	3,022	3,714	7,653	2,268	9,492	8,159	5,883	30,824	744	3,824	2,622
2016	20,855	12,401	1,464	310	999	415	922	3,061	1,558	3,157	4,080	7,947	2,329	9,428	8,388	6,351	32,218	745	3,878	2,772
2017	20,973	12,701	1,591	316	1,040	442	966	3,155	1,577	3,352	4,403	8,065	2,499	9,463	8,604	6,912	33,315	771	3,972	2,633
2018	21,660	13,166	1,678	329	1,090	444	1,064	3,234	1,332	3,530	4,556	8,168	2,750	9,349	9,414	7,392	32,758	833	3,933	2,582
Avg. Annual % Increase																				
	3.5%	3.1%	3.7%	2.7%	4.6%	7.1%	6.6%	4.3%	9.2%	5.5%	5.4%	6.2%	6.6%	0.6%	5.2%	6.7%	2.2%	3.5%	1.9%	1.1%

Note: Mental Health Practitioners: This industry comprises establishments of independent mental health practitioners (except physicians) primarily engaged in (1) the diagnosis and treatment of mental, emotional, and behavioral disorders and/or (2) the diagnosis and treatment of individual or group social dysfunction brought about by such causes as mental illness, alcohol and substance abuse, physical and emotional trauma, or stress. These practitioners operate private or group practices in their own offices (e.g., centers, clinics) or in the facilities of others, such as hospitals or HMO medical centers.

Specialty Therapists: This industry comprises establishments of independent health practitioners primarily engaged in one of the following: (1) providing physical therapy services to patients who have impairments, functional limitations, disabilities, or changes in physical functions and health status resulting from injury, disease or other causes, or who require prevention, wellness or fitness services; (2) planning and administering educational, recreational, and social activities designed to help patients or individuals with disabilities regain physical or mental functioning or adapt to their disabilities; and (3) diagnosing and treating speech, language, or hearing problems. These practitioners operate private or group practices in their own offices (e.g., centers, clinics) or in the facilities of others, such as hospitals or HMO medical centers.

Miscellaneous Health Practitioners: This U.S. industry comprises establishments of independent health practitioners (except physicians; dentists; chiropractors; optometrists; mental health specialists; physical, occupational, and speech therapists; audiologists; and podiatrists). These practitioners operate private or group practices in their own offices (e.g., centers, clinics) or in the facilities of others, such as hospitals or HMO medical centers. Examples include acupuncturists' (except MDs or DOs) offices, hypnotherapists' offices, and dental hygienists' offices

Other Ambulatory Health Care Services: This U.S. industry comprises establishments primarily engaged in providing ambulatory health care services (except offices of physicians, dentists, and other health practitioners; outpatient care centers; medical and diagnostic laboratories; home health care providers; ambulances; and blood and organ banks). Examples include health screening services (except by offices of health practitioners), physical fitness evaluation services (except by offices of health practitioners), hearing testing services (except by offices of audiologists), and smoking cessation programs.

Other Specialty Hospitals: This industry comprises establishments known and licensed as specialty hospitals primarily engaged in providing diagnostic and medical treatment to inpatients with a specific type of disease or medical condition (except psychiatric or substance abuse). Hospitals providing long-term care for the chronically ill and hospitals providing rehabilitation, restorative, and adjustive services to physically challenged or disabled people are included in this industry. These establishments maintain inpatient beds and provide patients with food services that meet their nutritional requirements. They have an organized staff of physicians and other medical staff to provide patient care services. These hospitals may provide other services, such as outpatient services, diagnostic X-ray services, clinical laboratory services, operating room services, physical therapy services, educational and vocational services, and psychological and social work services.

Source: U.S. Bureau of Labor Statistics Quarterly Census of Employment and Wages.

Life Sciences Industry

22

Levi Pace, Kem C. Gardner Policy Institute

2019 OVERVIEW

The life sciences industry supports health care quality in Utah and represents a highly productive, fast-growing cross-section of the state's economy. Life sciences companies develop, manufacture, and distribute medical devices, pharmaceuticals, and related products. The industry includes biotechnology firms, medical laboratories, diagnostics companies, professional services providers, and other establishments in 1,161 office locations around the state, as of 2018.[1] Utah's life sciences industry interfaces locally and globally with medical providers, pharmacies, and other customers.

The life sciences industry provided 45,354 full-time and part-time jobs in Utah during 2018, a 5.9% increase from the 42,831 jobs in 2017.[2] Employees held 84.7% of these jobs, spread across 21 of Utah's 29 counties. Self-employed workers filled the remaining 15.3%. Their combined earnings during 2018 were $3.7 billion, up from $3.3 billion the previous year.

Industry Composition

Utah's life sciences industry includes four components. The largest in 2018 was "research, testing, and medical laboratories" in the service sector. They provided more than one-third of all life sciences jobs and worker earnings.

The "medical devices and equipment" component was a close second in terms of economic activity. This type of advanced manufacturing supplied just over one-third of industry employment and paid nearly one-third of earnings.

Rounding out the state's life sciences ecosystem are "drugs and pharmaceuticals" manufacturing and wholesalers in "biosciences-related distribution." Together, these two components accounted for the remaining 28.7% of jobs and 33.2% of earnings at Utah's life sciences establishments.

Worker Earnings

Life sciences companies provide well-compensated career opportunities in Utah. While the industry supplies 2.2% of jobs in the state, its earnings footprint is disproportionately large at 3.5% of all worker earnings in Utah.

Average employee earnings in 2018 were more than 50% above the average for Utah jobs in other industries, whether we look at life sciences wages alone ($72,700) or total compensation ($92,400).

Self-employed workers in the state's life sciences industry earned an average of $26,100 per year, a modest 12.9% above the average for other industries. Workers report self-employment income for part-time second jobs, early-stage startups, and a variety of other situations.

2020 OUTLOOK

Growth Trends

Utah's life sciences sector is on a path of consistent expansion. For 15 of the 17 years from 2002 to 2018, annual growth in the number of Utah employees in the life sciences industry exceeded employee job growth in other industries. The average annual growth rate during that period was 3.5% among life sciences companies, compared to 2.0% for all other companies in Utah. Job growth in the life sciences industry remained positive throughout two economic recessions.

From 2012 to 2017, life sciences employment in Utah increased by 5.0% per year, on average.[3] This five-year growth rate was the highest of any top 20 state in terms of total life sciences employment. During this period, Utah moved from the 17th to the 14th largest life sciences sector in the country. These

1 We define Utah's life sciences industry as all companies in 15 industries and 111 individually selected establishments spread across 25 other industries. Based on their codes in the North American Industry Classification System, the 15 complete industries are NAICS 325411, 325412, 325413, 325414, 334510, 334516, 334517, 339112, 339113, 339114, 339115, 339116, 423450, 423460, and 621511. For more methodology details, see "Economic Impacts of Utah's Life Sciences Industry" by the Kem C. Gardner Policy Institute, University of Utah, August 2018. That study is the basis for this chapter, which updates many of its findings.

2 The release of detailed economic data for 2019 is scheduled for April of 2020.

3 Similarly, from 2013 to 2018, the annualized growth rate in the life sciences industry was 4.9% per year, well above the 3.3% average for all other industries in Utah.

rankings are noteworthy from a state with the 31st largest population, employed workforce, and GDP in the U.S. in 2017.

Industry Strengths

We attribute the long-running productivity of life sciences companies to Utah's innovative STEM workforce, its business management and entrepreneurial depth, advances in biotech, university research supported by federal grants, and partnerships involving major health care systems. Advantages like these helped Utah life sciences companies attract $4.1 billion in investment from 2013 to 2017, including venture capital, subsequent rounds of funding, mergers and acquisitions, and public stock offerings.[4]

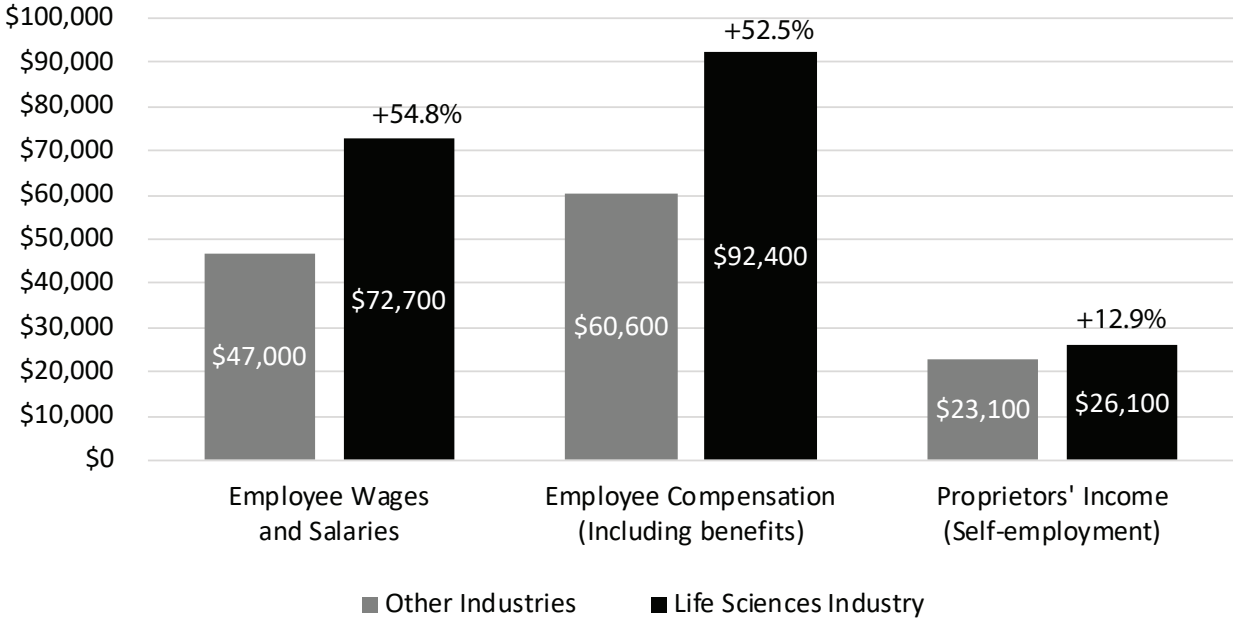
Global Factors

The life sciences industry is susceptible to national and international economic developments. Nearly 60% of pharmaceuticals, medical devices, and other products from Utah are sold outside the state, tying it to business cycle and global trade developments. We expect demand for cost-saving innovations and vital medical supplies and therapies to be less volatile than many other categories of demand.

Summary

During 2020, the life sciences industry is likely to grow faster than the rest of Utah's economy. Through the past two downturns, annual employment growth in the life sciences industry did not fall below about 1.5%. Even if economic conditions deteriorate, the life sciences industry is likely to adapt well and continue expanding. Population health, investor returns, tax revenue, and the livelihoods of a growing number of people in life sciences jobs in Utah all stand to benefit from continued progress.

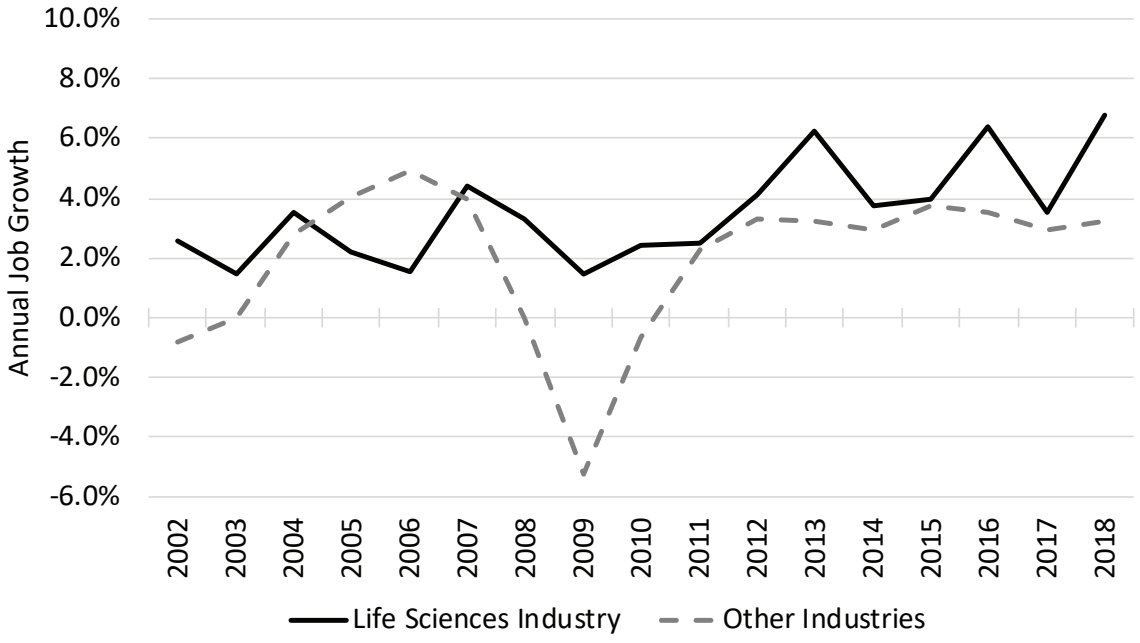
Figure 22.1: Average Annual Earnings per Job in Utah's Life Sciences Industry, 2018



Note: Percentage labels for the life sciences industry indicate the percent difference compared to industries besides life sciences. In the life sciences industry, wages and compensation are for its 38,435 employee jobs, and proprietors' income is for its 6,919 self-employed workers.

Source: Utah Department of Workforce Services and U.S. Bureau of Economic Analysis

Figure 22.2: Annual Employment Growth in Utah's Life Sciences Industry, 2002-2018

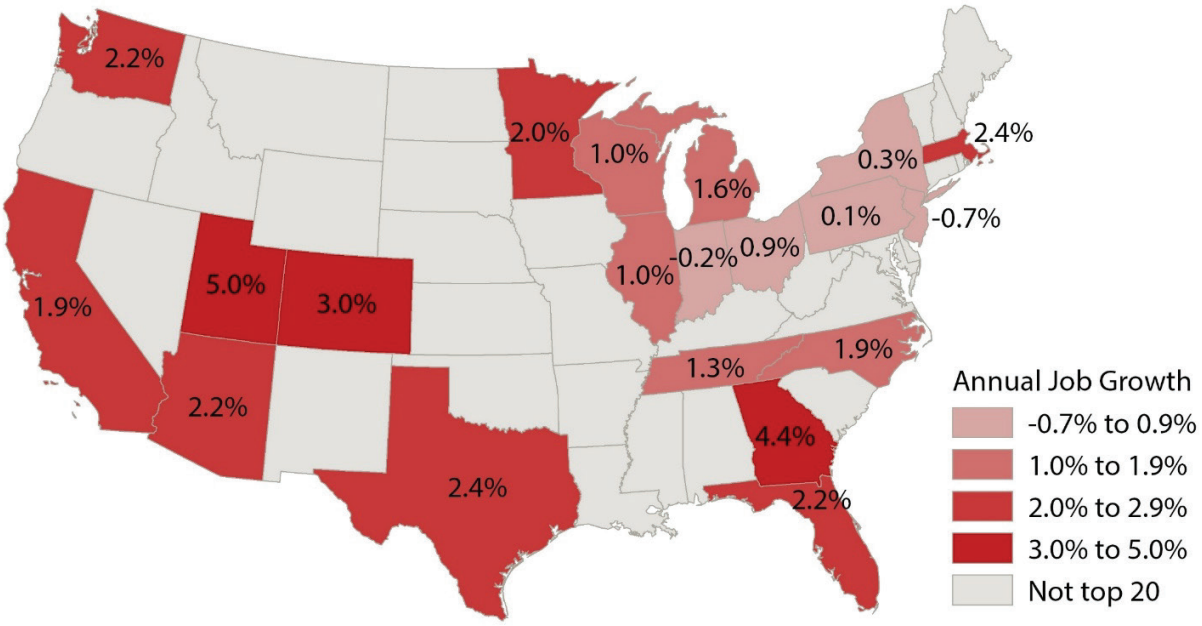


Note: This chart follows an adapted life sciences definition compatible with historical data limitations.

Source: Quarterly Census of Employment and Wages, U.S. Bureau of Labor Statistics

Figure 22.3: Life Sciences Growth in the Top 20 States, 2012 to 2017

(Five-Year Average Annual Employment Growth Rate)



Note: This chart follows an adapted life sciences definition compatible with historical data limitations.

Source: Utah Department of Workforce Services

Table 22.1: Employment in Utah's Life Sciences Industry, 2018

Industry Group	Employee	Self-Employment	Total	Share
Research, Testing, and Medical Laboratories	12,415	4,272	16,687	36.8%
Medical Devices and Equipment	13,960	1,700	15,660	34.5%
Drugs and Pharmaceuticals	6,624	332	6,956	15.3%
Biosciences-Related Distribution	5,436	615	6,051	13.3%
Total	**38,435**	**6,919**	**45,354**	**100.0%**
Share	**84.7%**	**15.3%**	**100.0%**	

Note: Employees work for a company they do not at least partially own, unlike self-employed workers (proprietors).
Source: Utah Department of Workforce Services and U.S. Bureau of Economic Analysis

Table 22.2: Worker Earnings in Utah's Life Sciences Industry, 2018

Industry Group	Employee	Self-Employment	Total	Share
Research, Testing, and Medical Laboratories	$1,172.2	$96.9	$1,269.1	34.0%
Medical Devices and Equipment	$1,236.3	-$11.8	$1,224.6	32.8%
Drugs and Pharmaceuticals	$593.2	$73.2	$666.4	17.9%
Biosciences-Related Distribution	$549.8	$22.0	$571.8	15.3%
Total	**$3,551.6**	**$180.2**	**$3,731.8**	**100.0%**
Share	**95.2%**	**4.8%**	**100.0%**	

Note: Employee earnings include payroll (wages and salaries) reported by companies and an estimate of employee benefits based on industry averages.
Self-employment earnings equal proprietors' income.
Source: Utah Department of Workforce Services, U.S. Bureau of Economic Analysis, and REMI PI+ economic modeling software

Utah's Tech Sector

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2019 OVERVIEW

As consumers, employees, and investors, Utah residents benefit from the state's robust tech industry, which provides technology capabilities and support. Tech companies employ a larger share of the workforce in Utah than nationwide. The industry's generous pay, compared with most other industries, attracts workers. Even with Utah's significant wage increases in recent years, tech companies find labor costs in Utah well below the national average. Job growth rates in Utah's tech industry have been high compared with other industries and states.

Types of Tech

The tech industry includes companies that develop software and connectivity solutions for personal and commercial use. Other tech companies manufacture and distribute computers and devices. Tech also includes e-commerce, with its online services and on-the-ground logistics, as well as other digital platforms. These functions serve customers nationwide and abroad. They help establish and reinvent Utah's economy in the information age.

Information technology is pervasive in Utah. We focus here on economic activity related to digital innovation that is fairly independent of the technology functions of any particular industry or sector, such as finance, construction, education, and health care. Our criteria are companies that create tech products and services, have a large share of workers in tech occupations, and invest in research and development at higher rates than the economy-wide average.[1]

Jobs and Earnings

Utah tech companies provided 118,600 jobs and $9.5 billion in earnings in 2018.[2] Just over 70% of this employment and well over 90% of these earnings came from companies with employees; self-employed workers generated the remaining activity. While 25 Utah tech companies had at least 500 employees, more than four out of five establishments in the state had fewer than 10 employees.

At $89,000 in 2018, average wages at Utah tech companies are nearly double what employees earned at non-tech companies in the state, partially because part-time jobs are relatively uncommon in the state's tech industry.

While 22 out of 29 counties in Utah have at least some tech employment, most tech companies congregate around urban hubs, particularly in southern Salt Lake County and northern Utah County. These two counties have disproportionately high levels of tech employment given their shares of statewide employment and population. Industry and government support to open offices in rural areas and encourage telecommuting help further extend industry benefits outside of existing growth centers.

State Comparisons

In 2018, Utah had the largest tech sector for a state its size. In terms of employment at tech companies, Utah had the 22nd largest tech footprint among all states, whereas Utah ranks just 31st for total employment in all industries.

The concentration of tech jobs in Utah is fifth-highest among all states. Reaching 6.4 percent in 2018, the 10-year climb in tech's share of total employment demonstrates Utah's increasing specialization in e-commerce, software, technology support, and advanced manufacturing.

1 Based on these criteria, we define the tech sector to include all 6,640 Utah establishments in 42 specialized subindustries, plus 71 individually selected establishments categorized elsewhere. For methodology details see "Utah's Tech Economy—Volume One: Economic Impacts, Industry Trends, Occupations, and Workers" by the Kem C. Gardner Policy Institute, July 2019.

2 The release of detailed economic data for 2019 is scheduled for April of 2020.

Tech Occupations

Utah's tech workforce extends well beyond tech companies. Every major industry hires for tech roles. In 2018, companies outside the tech industry filled 52,800 jobs in tech occupations, such as software developers, database administrators, computer systems analysts, computer support specialists, and audio and video equipment technicians. These jobs are in addition to the 118,600 jobs at tech companies themselves.

Utah employees in tech occupations are more likely to be male, mid-career, and White or Asian than are Utah employees in other occupations. The state's tight labor market and increasing population diversity point to further economic opportunities from broader participation by the state's various demographic groups.

2020 OUTLOOK

Growth Trends

Long-term trends in Utah's tech sector point to rising wages and expanding employment in 2020. From 2008 to 2018, Utah ranked second among states for its job growth rate. During that period, the average employee wage in Utah's tech industry rose 21.4%, nearly twice as fast as wages outside the tech industry. Tech companies also offer competitive benefit packages to retain talent.

The tech industry averaged 6.3% Utah job growth from 2011 to 2018, well above the 3.5% in other industries in the state. Though less than most industries, tech in Utah slowed during the Great Recession, with nearly a 4% drop in employment from 2008 to 2009. However, it recovered more quickly than other industries collectively. By 2011, Utah tech employment exceeded pre-recession levels by more than 5%.

Strengths and Opportunities

Storied homegrown companies, as well as local firms with origins outside the state, have been linchpins in Utah's fast-moving tech environment. Current economic activity is rooted in decades of private and public investments in Utah's tech sector and the business development efforts of state and local entities.

Continued tech growth requires sufficient office space and housing to accommodate business expansion and the families of out-of-state hires. This contributes to the state's construction and real estate industries, while diminishing affordability in office space and housing markets.

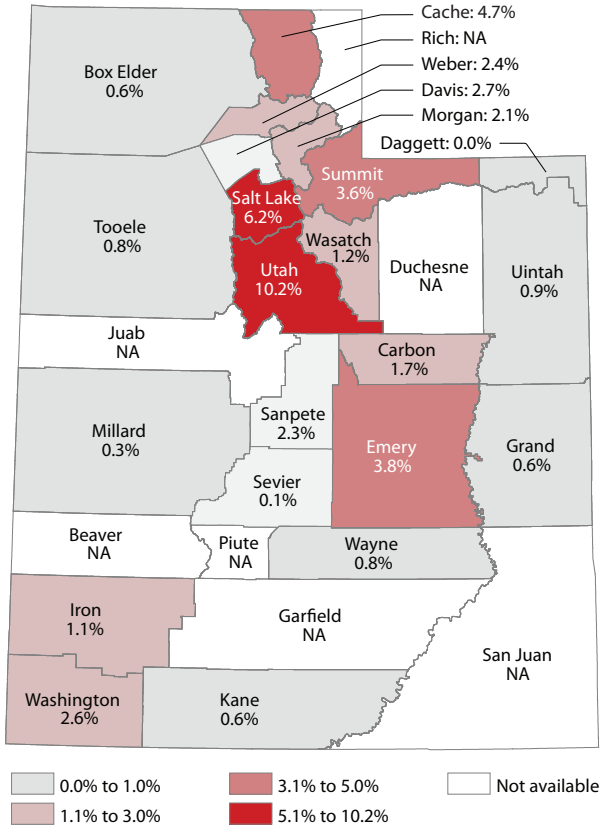
Particularly in high-growth areas along the Wasatch Front, the industry prompts new public spending, for example, to address rising school enrollment and changing traffic patterns. Tech companies benefit from public investments in education at all levels, transportation, lifestyle amenities, air quality, and other areas. In 2018, tech companies generated over $1.0 billion in tax revenue to help fund state and local government.

Potential risks to Utah's tech industry include specialized workforce shortages and softening domestic and global demand. There is potential for disruptive innovation in tech, although the state is well positioned to keep pace with technological change. In terms of policy exposure, digital privacy and cyber security are key issues, as well as any changes in U.S. access to international markets.

Summary

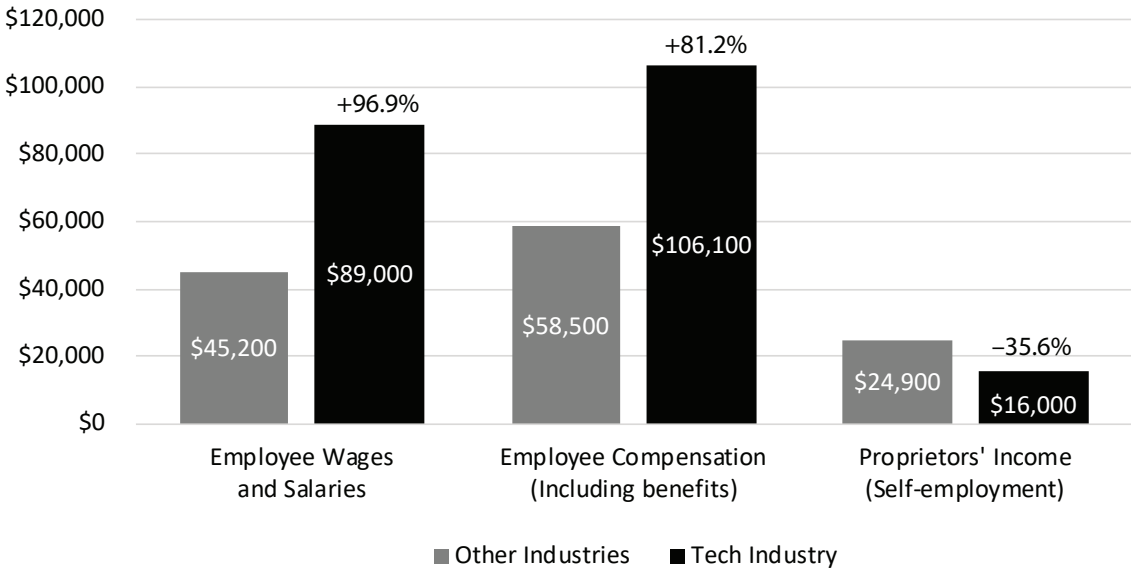
During 2020, the tech industry's reliable growth in employment and production is likely to persist. Rising wage pressure may result from Utah's increased cost of living and the need to retain talent and attract employees from other industries and states. Utah's tech workforce and business community will continue to contribute to the state's economic competitiveness.

Figure 23.1: Tech Industry Share of County Employment, 2018



Note: Map does not include self-employment. Jobs not disclosed for counties with one to five tech establishments.
Source: Utah Department of Workforce Services and State of Utah, State Geographic Information Database

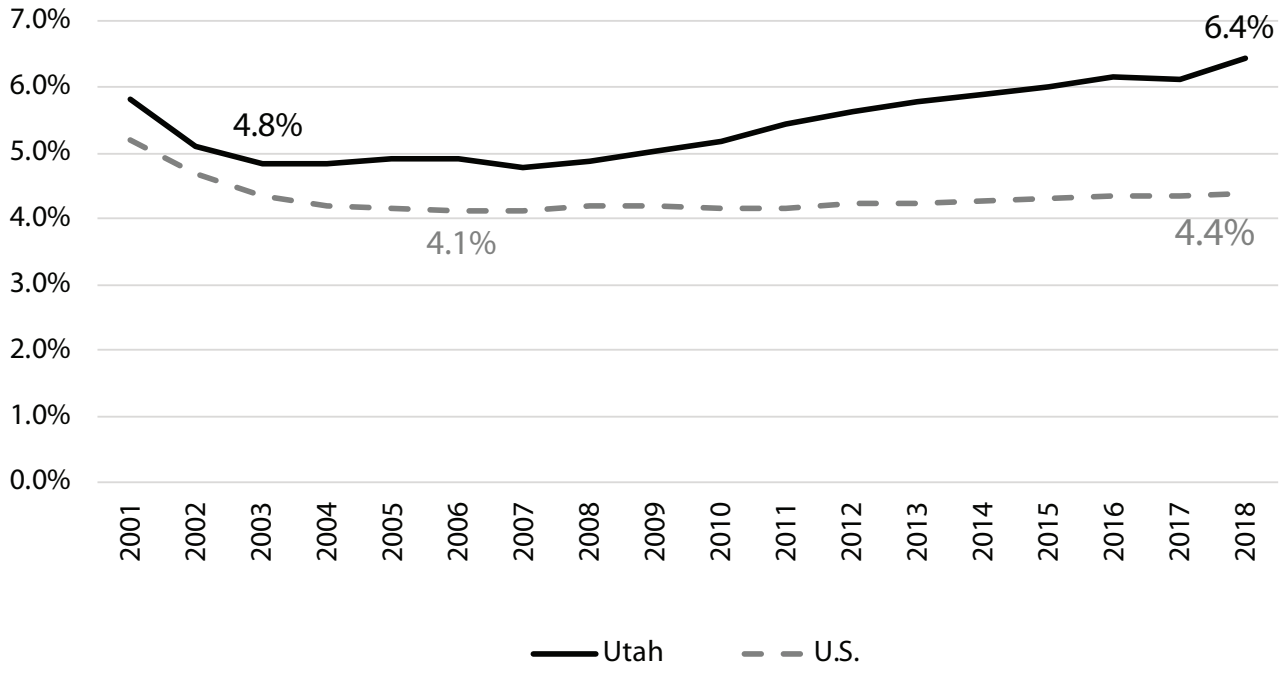
Figure 23.2: Average Annual Earnings per Job in Utah's Tech Industry, 2018



Note: Percentage labels for the tech industry indicate the percent difference compared to industries besides tech. In the tech industry, wages and compensation are for its 83,892 employee jobs, and proprietors' income is for its 34,729 self-employed workers.

Source: Utah Department of Workforce Services and U.S. Bureau of Economic Analysis

Figure 23.3: Tech Industry's Share of Utah's Private Sector Employment, 2001-2018



Note: Percentages equal tech industry employment in Utah divided by total employment for all industries in Utah's private sector. Chart follows an adapted tech industry definition compatible with historical data limitations.

Source: Quarterly Census of Employment and Wages, U.S. Bureau of Labor Statistics

Table 23.1: Employment and Earnings for Segments of Utah's Tech Industry, 2018

Tech Industry Component	Employment		Aggregate Earnings (Millions of Dollars)	
	Jobs	Share	Dollars	Share
Manufacturing				
Instruments and devices	4,436	3.7%	$521.6	5.5%
Electronic components and media	4,000	3.4%	$340.0	3.6%
Communications equipment	882	0.7%	$80.7	0.9%
Computer and peripheral equipment	542	0.5%	$60.6	0.6%
Subtotal	**9,860**	**8.3%**	**$1,002.9**	**10.6%**
Trade				
E-Commerce retail and wholesale	26,187	22.1%	$1,019.7	10.8%
Software and device sales	2,732	2.3%	$321.4	3.4%
Subtotal	**28,919**	**24.4%**	**$1,341.1**	**14.2%**
Information				
Software	12,177	10.3%	$1,576.1	16.7%
Telecommunications	8,544	7.2%	$624.6	6.6%
Data processing and hosting	6,885	5.8%	$488.3	5.2%
Internet publishing	2,723	2.3%	$319.8	3.4%
Subtotal	**30,329**	**25.6%**	**$3,008.8**	**31.8%**
Technology Support				
Custom computer programming	27,129	22.9%	$2,233.3	23.6%
Computer systems design	9,877	8.3%	$801.6	8.5%
Systems management and support	8,411	7.1%	$756.0	8.0%
Electronics repair and maintenance	2,392	2.0%	$135.6	1.4%
Software and computer training	1,704	1.4%	$175.3	1.9%
Subtotal	**49,513**	**41.7%**	**$4,101.8**	**43.4%**
Total	**118,621**	**100.0%**	**$9,454.6**	**100.0%**

Note: Includes employees and self-employed workers. Employment and earnings for semiconductor machinery included under "computer and peripheral equipment." Two of the totals don't quite match due to rounding.
Source: Utah Department of Workforce Services and U.S. Bureau of Economic Analysis

Table 23.2: Demographic Characteristics of Utah Employees in Tech Occupations, 2017

Category	Utah Occupations		U.S. Occupations	
	Tech	Other	Tech	Other
Sex				
Men	84.8%	54.0%	77.5%	51.8%
Women	15.2%	46.0%	22.5%	48.2%
Race/Ethnicity				
White	83.2%	79.7%	64.0%	62.7%
Hispanic	7.2%	13.5%	7.8%	17.5%
Asian	5.9%	2.4%	18.7%	5.5%
Pacific Islander	0.4%	1.0%	0.1%	0.2%
Black	0.4%	1.0%	6.7%	11.5%
American Indian	0.3%	0.7%	0.2%	0.5%
Other race/ethnicity	1.1%	0.2%	0.3%	0.2%
Two or more groups	1.4%	1.5%	2.2%	1.9%
Age				
18 to 34	39.2%	40.5%	32.4%	34.4%
35 to 49	37.9%	32.6%	38.3%	31.9%
50 and above	23.0%	26.8%	29.3%	33.7%
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Note: American Indian row includes Alaska Natives, and Pacific Islander row includes Native Hawaiians.
Source: U.S. Census Bureau, American Community Survey, Integrated Public Use Microdata Series from the University of Minnesota

Nonprofit Sector

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2019 OVERVIEW

Utah's nonprofit sector continues to play a role in the state's economy, with missions that aim to increase the quality of life for all Utahns. Healthcare, education, chambers of commerce, human services, and environmental stewardship are some examples of what the sector provides and addresses. 2019 was another year of healthy growth for the state's nonprofit sector.

As of September 2019, there are 10,395 registered nonprofits in Utah, 3.8% more than in 2018.[1] The value of all assets held by Utah's nonprofit sector totaled almost $32.5 billion—a $2.5 billion or 8.3% increase from 2018. The sector also earned a combined $23.7 billion in total income—a new measure for this report. Lastly, combined total gross revenue was almost $15.0 billion—an $800 million or 5.6% increase from 2018. These figures do not include nonprofit organizations that do not file a form 990 or report the value of their assets, total income, and revenue.[2]

The 2019 data show that 9,588 nonprofit organizations in the state are required to submit an IRS Form 990, 990-EZ, 990-PF, or 990-N. Of that number, 8,833 organizations report an asset value, income, and revenue on their form. An analysis of that data shows 7,733 organizations reporting incomes below $500,000 (74.4% of the sector or 80.7% of 990 filers), with 5,316 of them reporting incomes below $10,000 (51.1% of the sector or 55.4% of 990 filers). Lastly, 1,562 nonprofit organizations (15.0% of the sector) either did not file a form 990 or did not report any dollar amounts on their form 990.[3]

There are 8,602 501(c)(3) organizations in Utah, a 58.0% increase from 2014 (5,444)—about 82.8% of the nonprofit sector. The second and third largest groups of nonprofits are 501(c)(6) and 501(c)(4) organizations, the state having 490 (4.7% of the sector) and 296 (2.8% of the sector) of each type, respectively.[4]

There are 10 major groups for all 26 National Taxonomy of Exempt Entity (NTEE) codes.[5] Of those categories, the largest for the state is "unknown/unclassified" with 3,105 (30.2%) nonprofit organizations. The second and third largest categories are "human services" and "public/societal benefits," with 2,074 (20.1%) and 1,566 (15.2%) nonprofits under each, respectively.[6]

Nonprofit organizations are spread across Utah but are largely concentrated in Salt Lake, Utah, Davis, and Weber counties. Those counties account for three-quarters of all nonprofits in the state, with Salt Lake County home to 46.8% of all nonprofits. The counties with the fewest nonprofits are Piute, Daggett, Rich, and Beaver, with all four counties representing just 0.45% of all nonprofits in the state, and Piute County having only four organizations.[7]

The top three nonprofit organizations in the state in terms of assets, income, and revenue (filed and reported on IRS Form 990) are IHC Health Services Inc., SelectHealth Inc., and Western Governors University. They report a combined $12.0 billion in assets, over $15.6 billion in income, and over $9.3 billion in revenue, representing 37.0%, 65.8%, and 62.5% of the sector, respectively.[8]

1 "Exempt Organizations Business Master File Extract (EO BMF)." *Internal Revenue Service*. Data. Sept. 2019.
2 Ibid.
3 Ibid.
4 Ibid.
5 "National Taxonomy of Exempt Entities (NTEE) Codes." *Urban Institute: National Center for Charitable Statistics*. www.urban.org/research-area/national-center-charitable-statistics. 2 Apr. 2019.
6 "Exempt Organizations Business Master File Extract (EO BMF)." *Internal Revenue Service*. Data. Sept. 2019.
7 Ibid.
8 Ibid.

2020 OUTLOOK

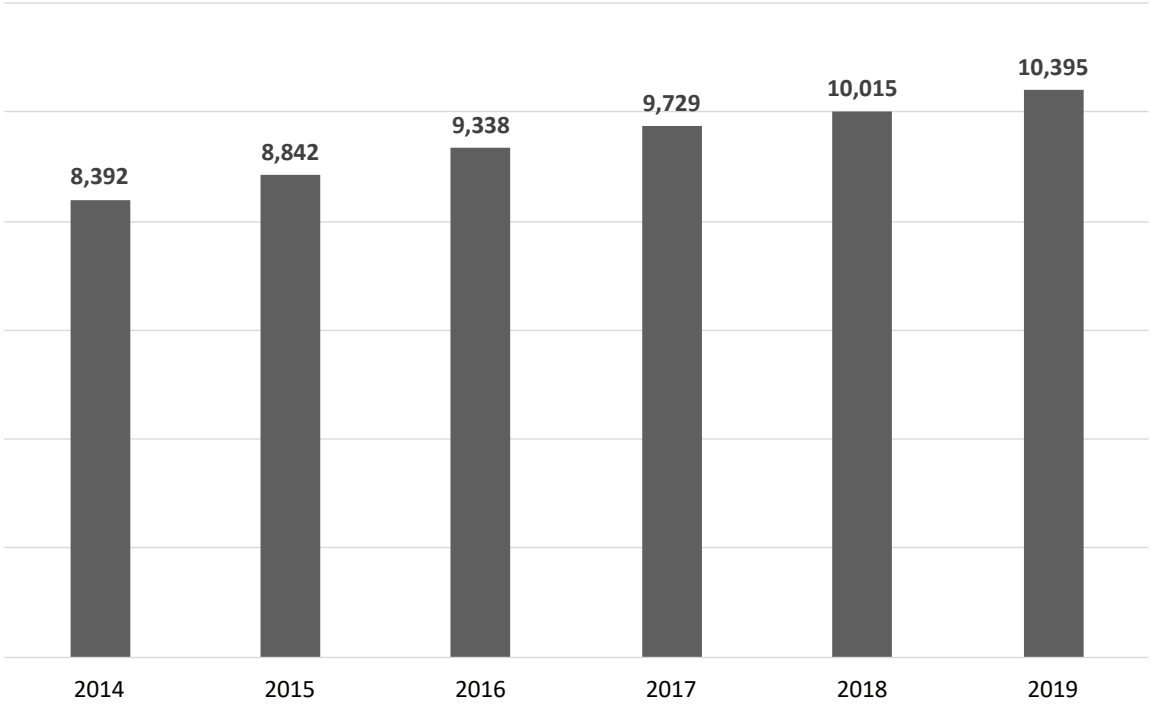
In 2020, Utah's nonprofit sector is expected to grow in the number of nonprofits and the value of assets, total income, and revenue. Yet, nonprofit leaders in the state should watch two specific trends: changes to charitable giving and the 2020 Census.

Most nonprofits rely upon the generosity of donors for much of their funding. Recent charitable giving reports indicate declining individual giving. The Institute of Policy Studies' *Gilded Giving 2018* reported that the share of households giving to charity dropped from 66% in 2000 to 55% in 2014. The report also noted that households making under $200,000 shrank from about 70% of charitable deductions in the early 2000s to 48% in 2017; most gifts now come from households with incomes over $200,000.[9] The American Enterprise Institute found that giving from households declined by $15.5 billion in 2018; their reason for it was the 2017 federal tax law.[10] Lastly, Giving USA, in their most recent report, indicated that individual charitable giving declined by 3.4% from 2017 to 2018, adjusting for inflation. This group of donors now accounts for 68% of overall giving, down 2 percentage points from 2017.[11] On the other hand, donations from private foundations and corporations increased by 4.7% and 2.9%, respectively, after inflation.[12] Nonprofits in Utah can expect little change to these trends in 2020. The nonprofit sector's growing reliance on foundations and corporations increases competition for limited dollars, making fundraising more difficult for local nonprofits. Congress will be looking at policy solutions throughout 2020.[13]

Data collected for the 2020 Census will determine how hundreds of billions of federal dollars are allocated to states for key programs, many of which are administered through nonprofits. Utah received $5.7 billion in funding in fiscal year 2016 (the latest data available)[14] from 55 federal programs, based on data collected during the 2010 Census. Assuring an accurate and complete count on Census Day will directly impact nonprofit budgets, the effectiveness of programming, and the ability to serve clients. Specifically, many nonprofits receive federal pass-through money for their work, based on Census data; they also utilize Census data in grant reports and funding requests to private sources. A lack of accurate data makes it difficult for nonprofits to understand and convey the needs of their communities. Without a complete count in 2020, Utah risks losing funding, forcing our charitable nonprofits to reduce their services. For example, the Head Start program in Utah is largely funded from federal pass-through money, with $63 million allocated in FY 2016 toward school readiness for low-income children.[15] If Utah does not have a complete count, the state loses sufficient funding to help the children and families who receive comprehensive education, health, nutrition, and family services.

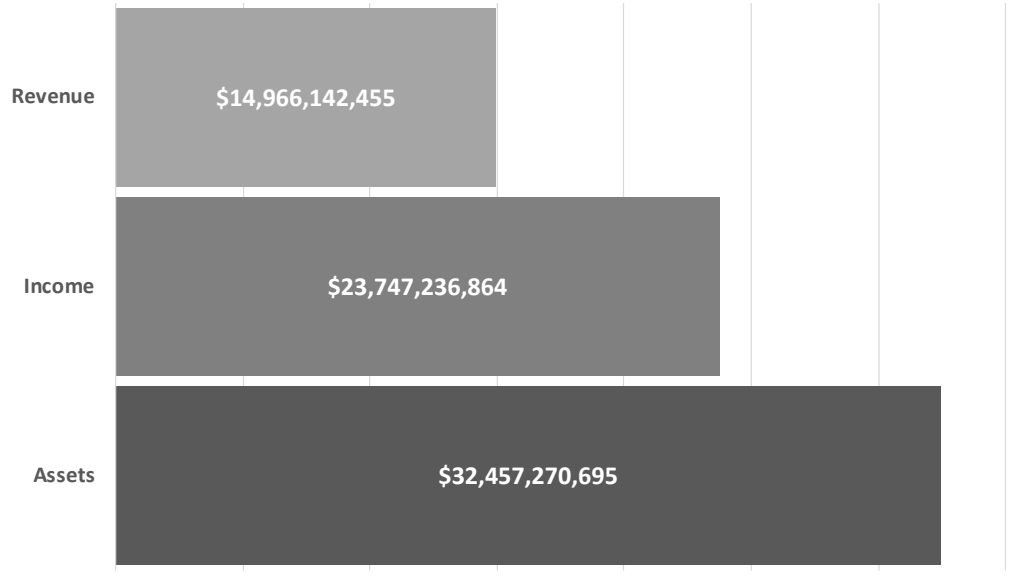
In 2020, Utah's charitable nonprofits will need to strengthen their cultures of philanthropy within their organizations, integrating quality data with intentional resource management in line with their missions. This focus will help nonprofits adapt and transform as the philanthropic landscape shifts, more organizations explore earned revenue models, the number of benefit-for-profit corporations (B-Corps.) increases, and as public policy impacting the sector changes at the federal and state levels.

Figure 24.1: Number of Utah Tax Exempt Nonprofit Organizations



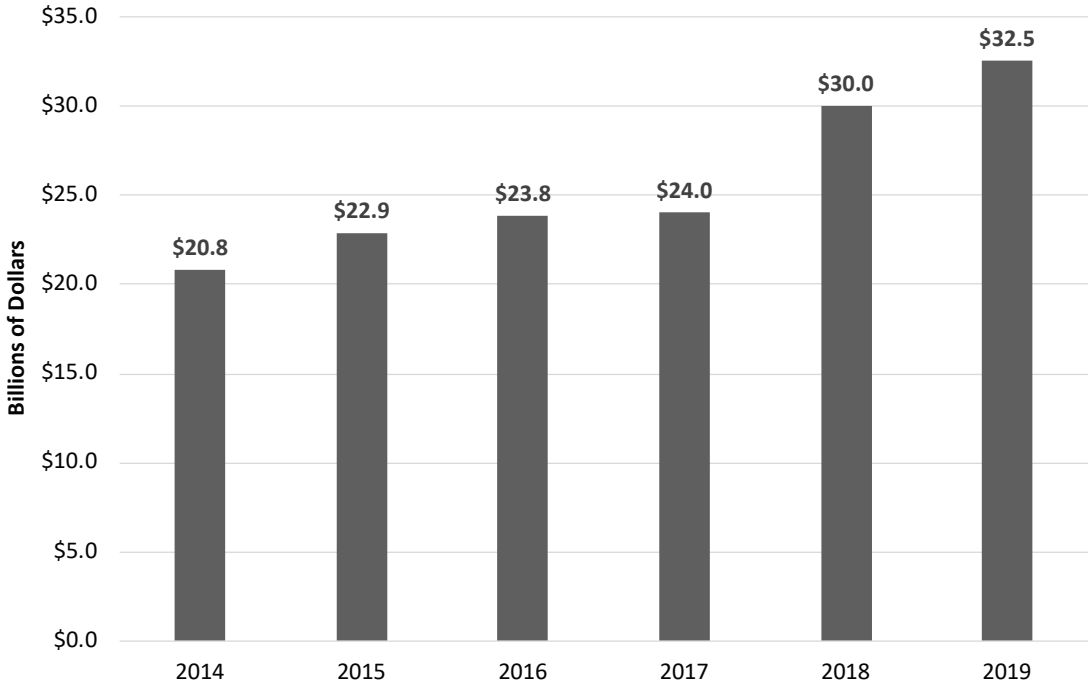
Sources: Internal Revenue Service, (October 2019, October 2018, July 2017, November 2016, December 2015, December 2014) Exempt Organizations Business Master File

Figure 24.2: Utah's Nonprofit Sector by Combined Revenue, Income, and Assets



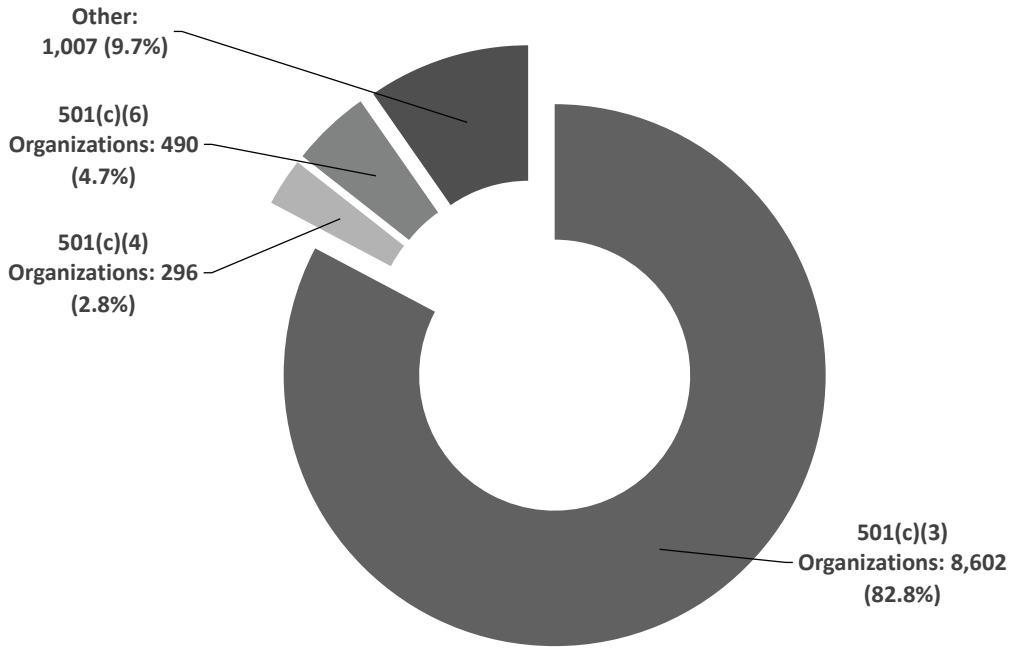
Sources: Internal Revenue Service, (October 2019) Exempt Organizations Business Master File

Figure 24.3: Utah Tax Exempt Nonprofit Organization Assets



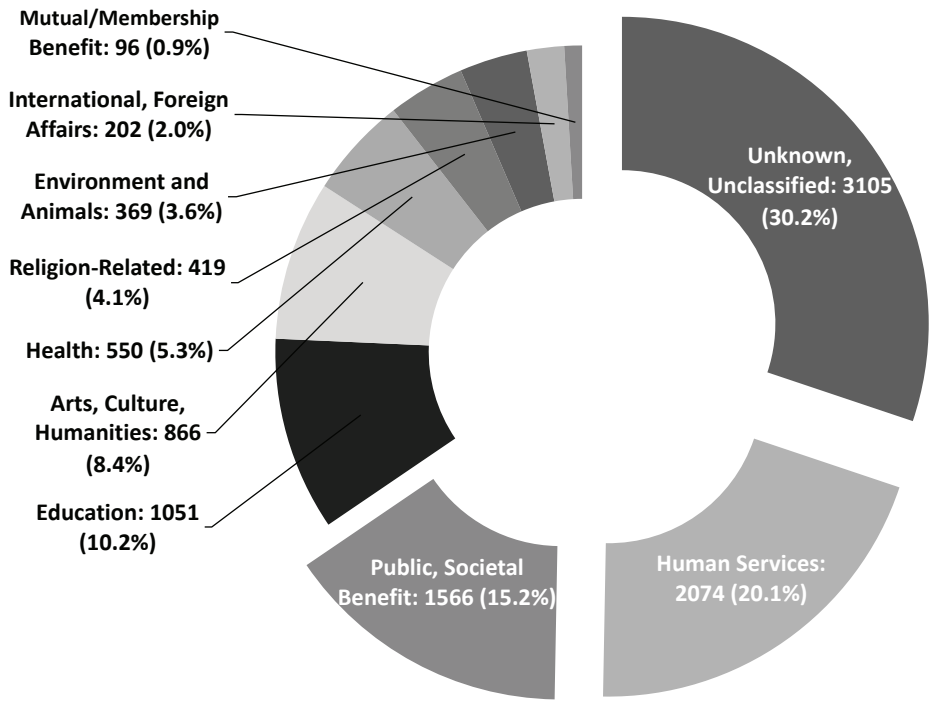
Sources: Internal Revenue Service, (October 2019, October 2018, July 2017, November 2016, December 2015, December 2014) Exempt Organizations Business Master File

Figure 24.4: Utah's Nonprofit Sector by IRS Subsection Designation



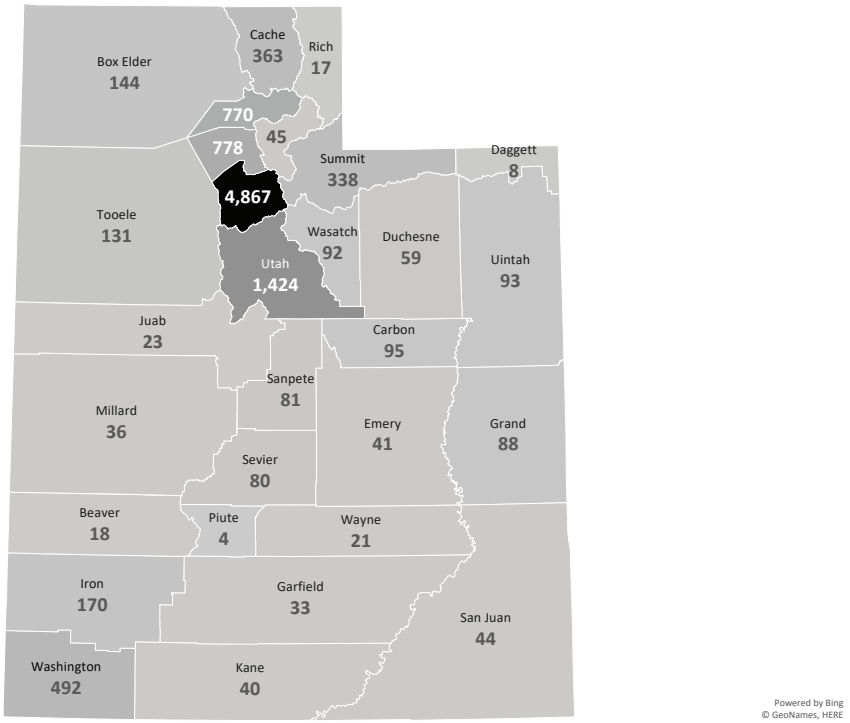
Sources: Internal Revenue Service, (October 2019) Exempt Organizations Business Master File

Figure 24.5: Utah's Nonprofit Sector by NTEE Major Groups



Sources: Internal Revenue Service, (October 2019) Exempt Organizations Business Master File; Jones, "National Taxonomy of Exempt Entities (NTEE) Codes", 2019

Figure 24.6: Utah's Nonprofit Sector by County



Source: Internal Revenue Service, (October 2019) Exempt Organizations Business Master File

Table 24.1: Utah's Nonprofit Sector by Reported Income

Reported Income	Number of Organizations
$0	4,770
$1 to $9,999	546
Reported Below $10,000	**5,316**
$10,000 to $24,999	243
$25,000 to $99,999	856
$100,000 to $499,999	1,318
Reported Below $500,000	**7,733**
$500,000 to $999,999	302
$1,000,000 to $4,999,999	528
$5,000,000 to $9,999,999	132
$10,000,000 to $49,999,999	114
$50,000,000 to Greater	24
Reported Above $500,000	**1,100**
Organizations with Reported Income	**8,833**
No Reported Income	**1,562**
Total Organizations	**10,395**

Sources: Internal Revenue Service, (October 2019) Exempt Organizations Business Master File

Table 24.2: Utah's Nonprofit Sectore by Filing Type

IRS Form 990 Filers		Organizations Not Required to File	
Required to File	**Total**	**Not Required**	**Total**
990/990-EZ	2,691	Churches	714
990-PF	1,120	Religious Organizations	35
990-N	5,764	Instrumentalities of State or Political Subdivisions	21
990-Group Return	9	All Other	37
990-Gov't 501(c)(1)	4		
990-BL	0		
Grand Total	**9,588**	**Grand Total**	**807**
Filers Reporting Revenue, Income, and Assets	**8,833**	**Not Required but Reported Revenue, Income, and Assets**	**7**

Sources: Internal Revenue Service, (October 2019) Exempt Organizations Business Master File