ECONOMIC REPORT *to the* GOVERNOR

PREPARED BY THE
UTAH ECONOMIC COUNCIL

2022

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

Preface

The 2022 Economic Report to the Governor is the 34th 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 demographic overview of the state, 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 2022 Economic Report to the Governor, published by the Utah Economic Council, is a collaboration of the state's economic community led by the Governor's Office of Planning and Budget, the David Eccles School of Business, and the Kem C. Gardner Policy Institute. 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, the Governor's Office of Planning and Budget, the 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 becomes final; therefore, some statistics in this report are estimates based on data available from October–December 2021. Readers should refer to noted sources later in 2022 for final data. Forecasts are also included in some of the tables and figures. All of the data in this report are subject to errors arising from a variety of factors, including sampling variability, reporting errors, incomplete coverage, non-response, imputations, and processing error. If there are questions about the sources, limitations, and appropriate use of the data included in this report, the relevant entity should be contacted.

Data for States and Counties

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

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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Economic Outlook - United States

Darin Mellott, CBRE

The U.S. economy—as measured by GDP—has fully recovered from the pandemic-induced recession of 2020. A Wall Street Journal survey forecasts U.S. GDP growth of 3.6%[1] in 2022, well above the long-term trend of 2%.

Amid optimistic growth expectations, it is important to note that economic dynamics will continue to be shaped by the pandemic's course. As the delta and omicron variants showed, that course is difficult to predict. Still, the impact of the virus will lessen over time thanks to greater availability of vaccines and powerful therapeutics such as monoclonal antibodies and antiviral pills. Consequently, although the virus will remain present, its impact on society—in terms of the economy, healthcare systems and people—is expected to be more subdued in 2022 compared to 2020 and 2021.

Also of concern during the coming year is the level of price increases. Thanks to robust economic growth (fueled by fiscal and monetary stimulus), labor shortages and disrupted supply chains, inflation reached multi-decade highs in the U.S. during 2021. Looking ahead, price increases—as measured by Core PCE, the Federal Reserve's preferred measure—will remain elevated during the first half of 2022. However, those increases are expected to cool during the second half of the year with Q4 2022 year-over-year Core PCE up just 2.5%.[2] Moderation is expected thanks to cooling economic growth and fewer supply chain issues during the coming year.

With a strong economic recovery underway and inflationary pressure, the Federal Reserve will end its asset purchases (quantitative easing) in Q1 2022. This will set the stage for an increase in the federal funds rate and the potential for up to two more interest rate hikes in 2022. Long-term rates are also expected to rise, with the yield on the 10-year Treasury climbing to 2.2%[3] by the end of 2022. Given robust economic growth, interest rates at this level will not be disruptive.

While the outlook for 2022 is positive, uncertainty remains. Risks to the downside include slowing economic growth in China (the world's second largest economy) and on-going risks related to COVID, such as new vaccine-resistant variants. Additionally, as the Federal Reserve balances its dual mandate with on-going uncertainty, the potential for a policy error could impact growth in 2022 and beyond.

Further reinforcing expectations for a strong economy, the recently passed Infrastructure Investment and Jobs Act includes $550 billion of new spending on physical infrastructure over the next 10 years. This will translate into stronger economic growth over the short term and long term, thanks to spending on projects and improved productivity. Should the Biden Administration and Congress come to an agreement on the "Build Back Better" agenda, such an increase in spending could also provide some upside risk to expected growth levels.

1 Wall Street Journal. WSJ Economic Survey. Q4 2021.
2 *ibid*
3 *ibid*

Economic Outlook - Utah

Juliette Tennert, Utah Economic Council

Utah bounced back in 2021 from the pandemic recession shock. The state added a record-breaking 72,500 jobs over the year, recovering the 20,900 jobs lost in 2020 and gaining an additional 51,600 new jobs. Nationally, the jobs base is still 3.3% smaller than pre-pandemic. In 2021, only Utah and Idaho had more jobs than in 2019. The state's recovery has been widespread, but pockets of challenge remain. The leisure, hospitality and mining industries have yet to reach their 2019 peaks. Three counties—Garfield, San Juan, and Uintah—experienced unemployment rates in 2021 that were twice the statewide average.

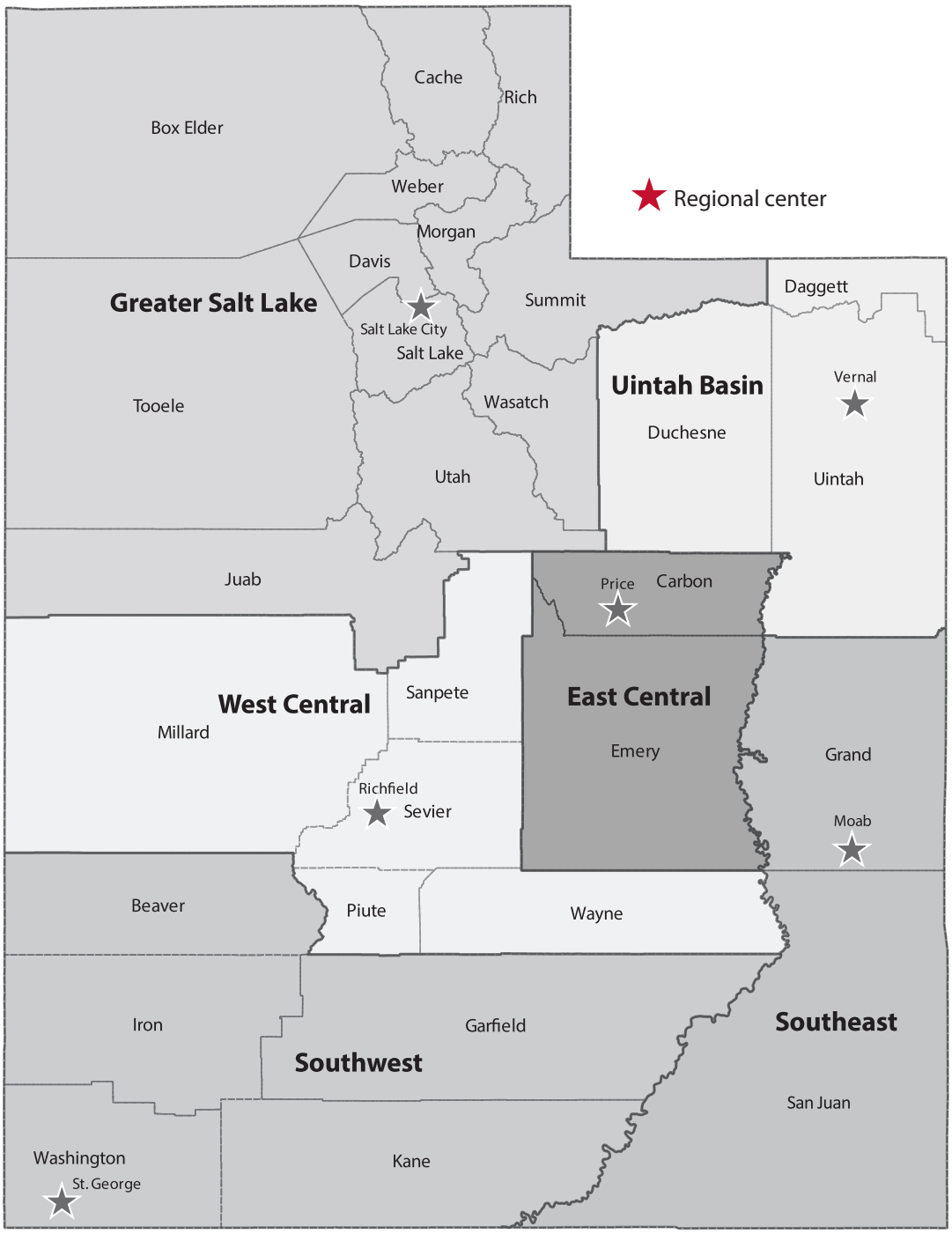
Though it has yet to fully add back all jobs lost in 2020, on account of both the severity of the loss and a tight labor market, the travel and tourism sector shone bright in 2021. Despite operating under pandemic conditions and international travel restrictions, Utah ski resorts experienced a record number of skier visits during the 2020-21 season. Preliminary data suggest that visitors to Utah's state and national parks also hit a record high in 2021.

Net in-migration reached a 16-year high in 2021, with nearly 35,000 new residents moving in from out of state. Population growth, combined with job and wage growth and low interest rates, fueled the ongoing real estate and construction boom. The value of nonresidential construction reached a new peak of $2.7 billion, and builders permitted a record 35,500 new dwelling units, despite supply-chain challenges and price pressures. Strong demand continues to boost home prices, which increased a never-experienced 23.5% over the year.

The consensus forecast predicts another year of substantial economic expansion in Utah in 2022. The most pressing internal risks will be growth-driven challenges like a limited labor supply, increasing costs, and housing affordability. Declining fertility, air quality, and water challenges will also add pressure. COVID-19 and inflation pose additional downside risks.

Utah's fundamental advantages—a youthful demographic profile, economic diversity, a stable fiscal and regulatory environment, crossroads of the west location, global connections, and social cohesion—will continue to influence the state's economic position in 2022 and beyond. As long as major risks to the national expansion are not realized, Utah's economy will once again be among the best in the nation.

Utah's Economic Regions



Source: Kem C. Gardner Policy Institute

Economic Indicators for Utah and the United States, December 2021

DEMOGRAPHICS	UNITS	2020 ACTUAL	2021 ESTIMATE	2022 FORECAST	PERCENT CHANGE 19–20	20–21(e)	21(e)–22(f)
U.S. July 1st Population	Millions	331.6	332.0	333.2	0.3%	0.1%	0.3%
Utah July 1st Population	Thousands	3,285	3,344	3,403	1.8%	1.8%	1.8%
Utah Net Migration	Thousands	26.1	34.9	34.1			
Utah Households	Thousands	1,057.3	1,082.7	1,109.3	1.8%	2.4%	2.5%
EMPLOYMENT AND WAGES							
U.S. Nonfarm Employment (BLS)	Millions	142.3	146.1	151.7	-5.7%	2.7%	3.8%
U.S. Unemployment Rate (BLS)	Percent	8.1	5.4	3.6			
U.S. Total Nonfarm Wages (BEA)	Billion Dollars	9,444	10,305	11,178	1.3%	9.1%	8.5%
U.S. Average Annual Pay (BLS)	Dollars	66,391	70,511	73,662	7.5%	6.2%	4.5%
U.S. Personal Income (BEA)	Billion Dollars	19,627.6	21,040.5	21,324.4	6.5%	7.2%	1.3%
Utah Nonfarm Employment (DWS)	Thousands	1,538.8	1,611.4	1,655.6	-1.3%	4.7%	2.7%
Utah Unemployment Rate (DWS)	Percent	4.7	2.7	2.1			
Utah Total Nonfarm Wages (DWS)	Dollars	83,043	88,900	94,460	7.3%	7.1%	6.3%
Utah Average Annual Pay (BEA)	Million Dollars	53,964	55,170	57,058	8.7%	2.2%	3.4%
Utah Personal Income (BEA)	Million Dollars	169,656	179,242	182,511	7.8%	5.7%	1.8%
PRODUCTION AND SALES							
U.S. Real Gross Domestic Product	Billion Chained $2012	18,385	19,424	20,256	-3.4%	5.7%	4.3%
U.S. Real Exports	Billion Chained $2012	2,208	2,301	2,434	-13.6%	4.2%	5.7%
U.S. Retail Sales	Billion Dollars	6,201	7,421	7,661	0.3%	19.7%	3.2%
Utah Exports (NAICS, Census)	Million Dollars	17,674	19,953	20,471	1.9%	12.9%	2.6%
Utah All Taxable Sales	Million Dollars	74,731	88,862	92,510	8.4%	18.9%	4.1%
REAL ESTATE AND CONSTRUCTION							
U.S. Private Residential Investment	Billion Dollars	898	1,082	1,144	10.3%	20.5%	5.7%
U.S. Nonresidential Structures	Billion Dollars	597	581	620	-11.2%	-2.7%	6.7%
U.S. Purchase-only Home Price Index	1991Q1 = 100	292	339	379	7.8%	16.2%	11.6%
Utah Dwelling Unit Permits	Thousands	32,237	35,500	36,000	16.8%	10.1%	1.4%
Utah Residential Permit Value	Million Dollars	6,785	7,700	8,000	17.0%	13.5%	3.9%
Utah Nonresidential Permit Value	Million Dollars	2,567	2,700	2,700	-1.1%	5.2%	0.0%
Utah Purchase-only Home Price Index	1991Q1 = 100	541	668	750	7.4%	23.5%	12.3%
ENERGY PRODUCTION AND PRICES							
West Texas Intermediate Crude Oil	$ Per Barrel	39.3	68.0	72.0	-31.1%	73.3%	5.9%
Utah Coal Production	Million Tons	13	12	13	-7.1%	-9.2%	8.3%
Utah Coal Prices	$ Per Short Ton	37.22	33.45	35.00	-1.9%	-10.1%	4.6%
Utah Crude Oil Production	Million Barrels	31	34	37	-16.1%	12.6%	6.0%
Utah Oil Prices	$ Per Barrel	34.91	61.00	65.00	-27.8%	74.7%	6.6%
Utah Natural Gas Production Sales	Billion Cubic Feet	202	198	200	-9.4%	-2.0%	1.0%
Utah Natural Gas Prices	$ Per MCF	1.96	4.00	3.90	-21.9%	104.1%	-2.5%
Utah Copper Mined Production	Million Pounds	309	315	400	-24.6%	1.9%	27.0%
Utah Copper Prices	$ Per Pound	2.80	4.25	4.50	9.8%	51.8%	5.9%
PRICES, INTEREST RATES, AND SENTIMENT							
U.S. CPI Urban Consumers	1982-84 = 100	259	271	281	1.2%	4.6%	3.7%
U.S. Federal Funds Rate	Effective Rate	0.4	0.1	0.2			
U.S. 3-Month Treasury Bills	Discount Rate	0.4	0.0	0.1			
U.S. 10-Year Treasury Notes	Yield (%)	0.9	1.4	1.7			
30-Year Fixed Mortgage Rate	Percent	3.1	2.9	3.3			
U.S. Consumer Sentiment (U of M)	Index	81.5	77.5	85.9	-15.0%	-4.8%	9.4%
Utah Consumer Sentiment (Gardner)	Index	—	87.5	93.0	—	—	6.3%

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

Demographics

1

Mallory Bateman, Kem C. Gardner Policy Institute
Emily Harris, Kem C. Gardner Policy Institute

2021 OVERVIEW

Despite the considerable challenges of conducting a population count in the midst of a pandemic, the release of new decennial census data provided a set of solid population reference points. The 2020 census data identified Utah as the fastest-growing state in the nation at 18.4% growth between 2010 and 2020. Natural increase drove growth throughout the past decade, but net migration contributed more than half of the growth between 2020 and 2021. The state continues to age and become more diverse. A 1.8% population increase between 2020 and 2021 is the highest growth rate since 2017.

2020 Census

State, County, and City Changes

The April 1, 2020, resident population in Utah was 3,271,616. The increase of 507,731 new Utahns since 2010 placed Utah as the fastest-growing state in the nation at 18.4%. Despite being the fastest-growing state, this increase was less than in the previous two decades in both absolute and percentage terms. Nationwide, a growth rate of 7.4% was the 2nd slowest decadal rate in recorded history, reflecting an aging population, declining births and significant reduction in immigration flows.

Per the 2020 census count, six counties grew faster than the state, while seven counties experienced population declines between 2010 and 2020. Wasatch, Washington, Morgan, Utah, Tooele, and Iron were the fastest-growing counties, while Daggett, Emery, Wayne, Piute, Carbon, Garfield, and San Juan lost population. These statewide population changes reflected a national trend of areas near urban centers experiencing intense growth while rural or smaller communities experienced population stagnation or decline.

Salt Lake and Utah counties added the most residents, at 155,583 and 142,835, respectively. Four cities (Herriman, Lehi, South Jordan, and Eagle Mountain) accounted for 111,136 of these new residents within these two counties. Smaller communities in the region, such as Vineyard and Bluffdale, added to this growth. Vineyard grew by 8,923%, adding over 12,000 new residents. Bluffdale increased by a more modest 124%, adding 9,416 new residents.

Age Structure

Limited age insights are available from the released 2020 census data. However, we know that Utah has the largest share of the population under age 18 (28.6%) and, conversely, the lowest share of 18 and older (71.4%) in the nation. These shares reflect a decreasing trend from prior decennial counts for the under 18 population, from 32.2% in 2000 and 31.5% in 2010.

Households and Housing Units

Utah had the fastest increase in housing units between 2010 and 2020, adding 17.5% to the housing stock. Of the 1,151,414 housing units statewide on April 1, 2020, 1,057,252 or 91.8% were occupied.

Similar to population, Wasatch County also experienced significant growth in housing units, increasing 36.7% or 3,885 to reach 14,462 housing units in 2020. Utah County had the second-highest rate of housing unit growth at 29.8%, reaching a total of 192,570 units. Washington County was a close third at 29.1% or 16,796 new units, totaling 74,530 in 2020. Salt Lake County added the most housing units (64,248).

Race and Hispanic Origin

The initial 2020 census data indicated a continued racial and ethnic diversification of the Utah population. This decade, residents identifying as racial or ethnic minority populations drove over half (52.0%) of statewide growth. One-in-four Utahns now identify as a race or ethnicity other than non-Hispanic White, increasing from one-in-five in 2010.

While the non-Hispanic White population remains the largest share of the state (75.4%), the Hispanic or Latino population is the 2nd largest at 15.1% or 492,912 residents. The following non-Hispanic or Latino populations were the fastest growing throughout the decade: Some Other Race and Two or More Races, Native Hawaiian or Other Pacific Islander, Asian, and Black or African American. Utahns under 18 are more likely than their older peers to identify as a race or ethnicity other than non-Hispanic White.

State and County Population Estimates

Utah's population added 58,729 residents between July 1, 2020, and July 1, 2021, resulting in a population of 3,343,552, according to estimates prepared by the Utah Population Committee (UPC). The annual growth rate of 1.8% is slightly higher than the previous year's percent growth, 1.7%.

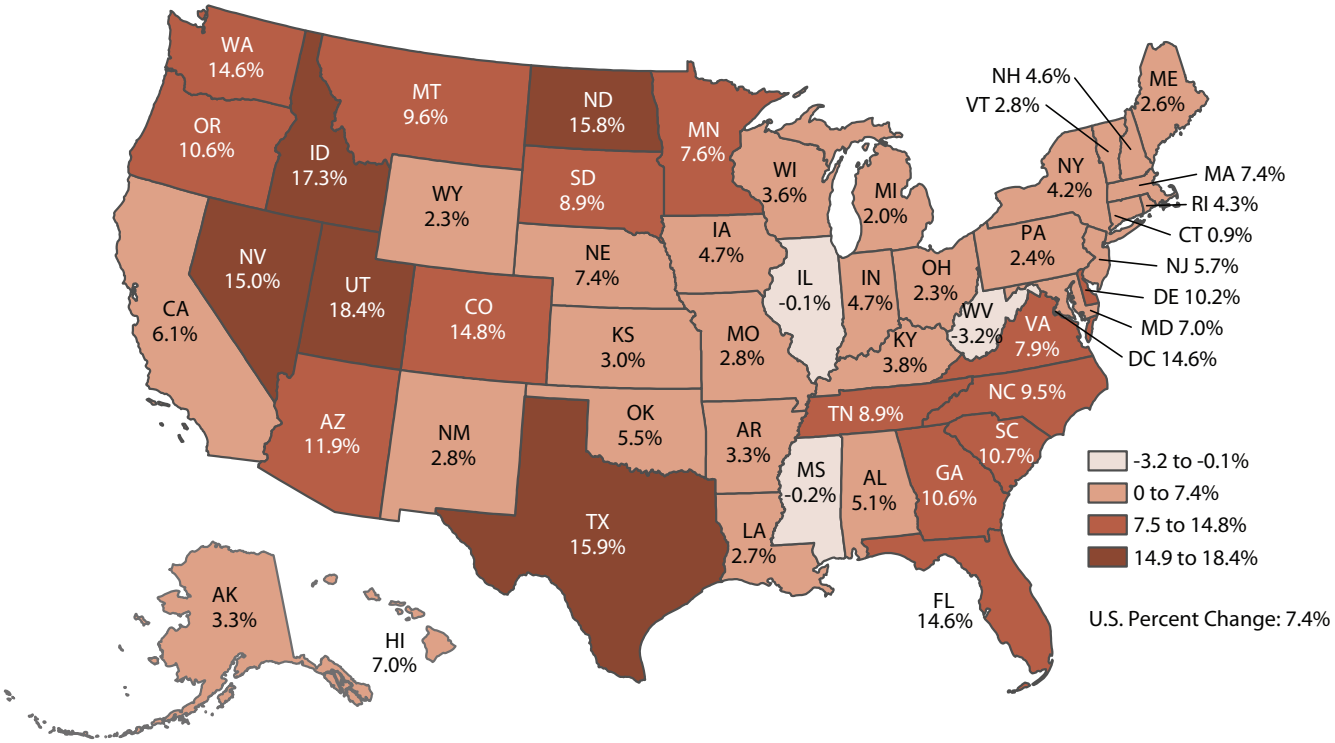
A 14.9% increase in deaths, driven by COVID-19, combined with a slight decrease in births, resulted in the lowest natural increase on state record since 1975. Utah's net migration increased to the highest level since 2005, now at 34,858 and almost 10,000 higher than last year. Net migration contributed 59% of Utah's population growth this year.

Iron County experienced the fastest growth at 6.2%, followed by Tooele County (4.1%), Washington County (4.0%), and Utah County (2.9%). Net migration drove nearly all (90%) of Iron County's growth. Utah County added the most residents (19,367 or a 2.9% increase), more than half of which came from net migration. Utah County's increase accounts for 33.0% of statewide growth.

2022 Outlook

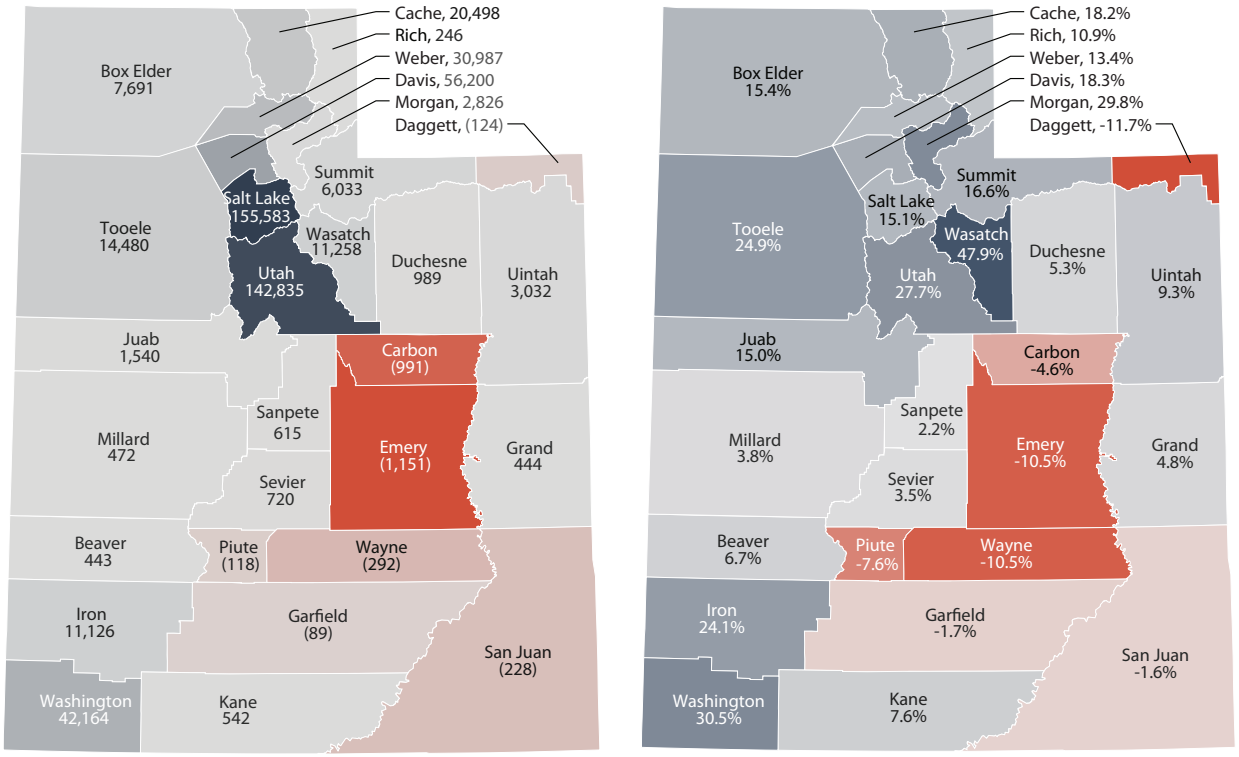
2022 will be a year of continuing growth with strong migration. The Intermountain West will remain an attractive area to potential new residents seeking employment opportunities and retirement options. Natural increase will likely return to pre-pandemic levels as COVID-19 tapers off and deaths are reduced.

Figure 1.1: Annual Rate of Change: April 1, 2010 to April 1, 2020



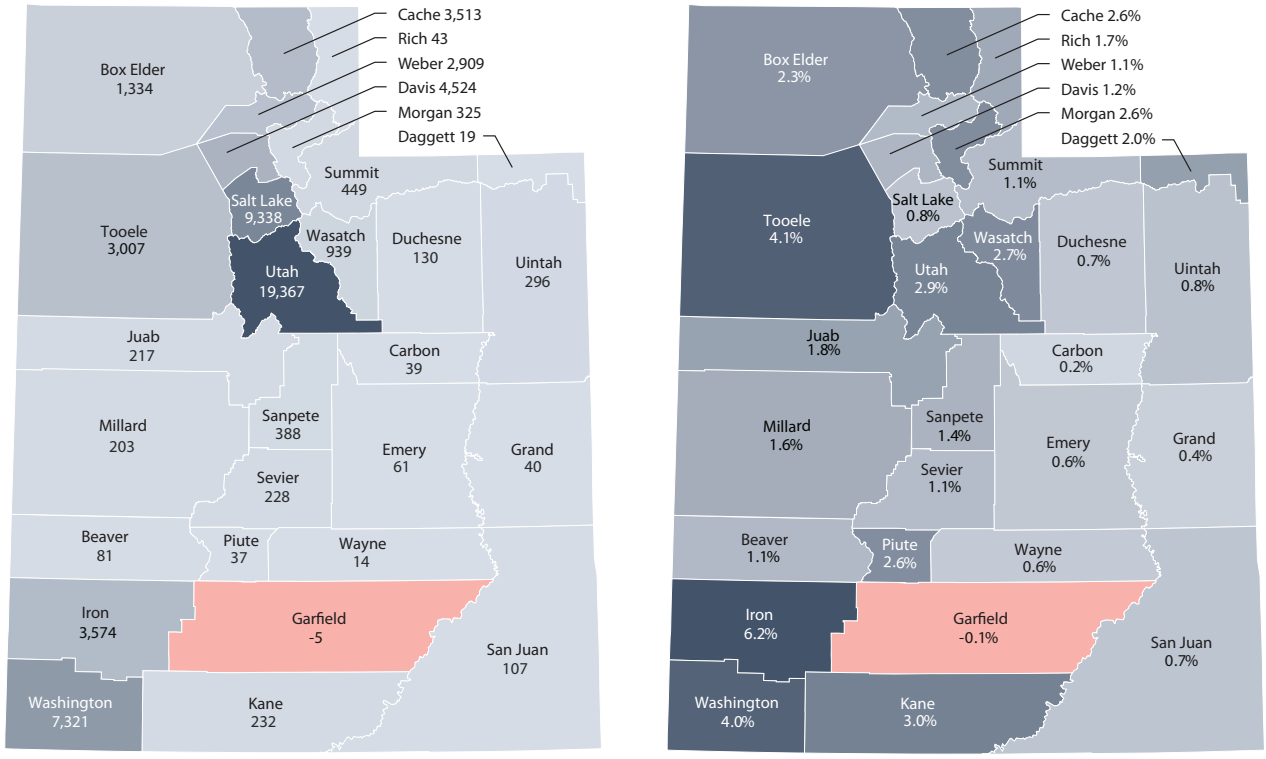
Source: U.S. Census Bureau, 2020 Apportionment Data

Figure 1.2: Absolute and Percentage Changes in County Population, 2010-2020



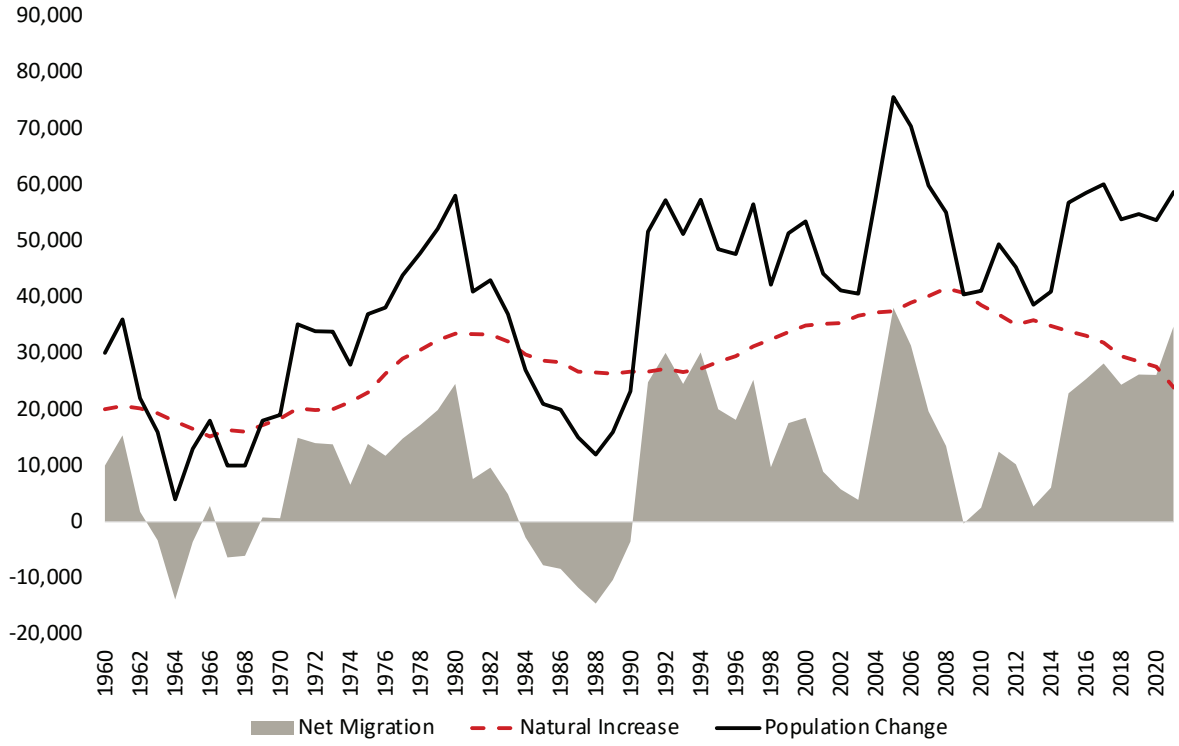
Source: 2020 Census State Redistricting Data (Public Law 94-171) Summary File, U.S. Census Bureau

Figure 1.3: Absolute and Percentage Changes in County Population, 2020-2021



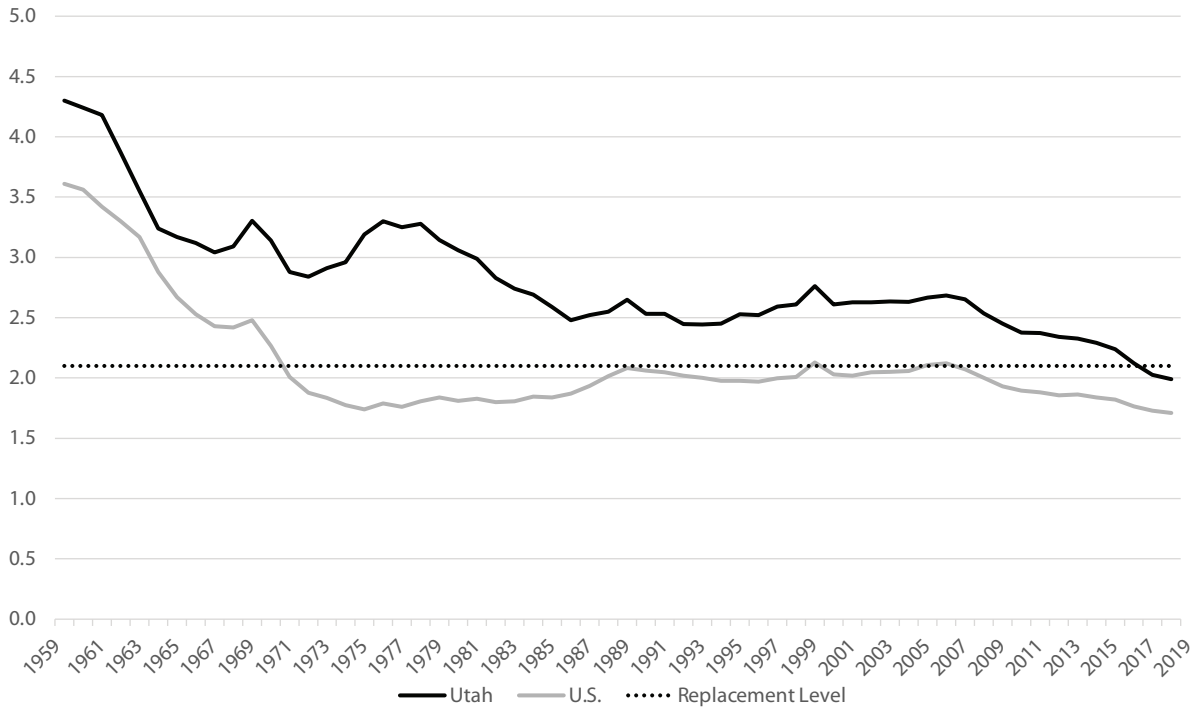
Source: Utah Population Estimates Committee and Utah Population Committee

Figure 1.4: State of Utah Components of Population Change



Source: Utah Population Estimates Committee and Utah Population Committee

Figure 1.5: 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	2,772,667	1.5%	41,107	2,510	38,597	52,899	14,302
2011	2,822,091	1.8%	49,424	12,485	36,939	51,836	14,897
2012	2,867,404	1.6%	45,313	10,214	35,099	50,388	15,289
2013	2,906,022	1.3%	38,617	2,732	35,885	51,801	15,916
2014	2,946,989	1.4%	40,967	6,101	34,866	50,807	15,941
2015	3,003,792	1.9%	56,802	22,852	33,950	51,024	17,074
2016	3,062,384	2.0%	58,592	25,443	33,149	50,704	17,555
2017	3,122,477	2.0%	60,093	28,195	31,898	49,494	17,596
2018	3,176,342	1.7%	53,864	24,381	29,483	47,628	18,145
2019	3,231,108	1.7%	54,766	26,191	28,575	47,115	18,540
2020	3,284,823	1.7%	53,715	26,142	27,573	46,510	18,937
2021	3,343,552	1.8%	58,729	34,858	23,871	45,639	21,768

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

Table 1.2: Utah Population Estimates by County

	July 1 Estimates		July 1, 2020-July 1, 2021		July 1, 2021				
	2020 Population	2021 Population	Absolute Growth	Growth Rate	Births	Deaths	Natural Increase	Net Migration	Net Migration Share of Growth
Beaver	7,076	7,156	81	1.14%	90	72	18	63	77.7%
Box Elder	57,886	59,220	1,334	2.31%	780	481	299	1,035	77.6%
Cache	133,743	137,255	3,513	2.63%	2,069	669	1,400	2,113	60.1%
Carbon	20,449	20,488	39	0.19%	232	275	-43	82	208.9%
Daggett	943	962	19	1.99%	13	6	7	12	62.7%
Davis	363,419	367,944	4,524	1.24%	4,789	2,216	2,573	1,951	43.1%
Duchesne	19,608	19,738	130	0.66%	247	166	81	49	37.6%
Emery	9,824	9,885	61	0.62%	107	114	-7	68	111.5%
Garfield	5,084	5,079	-5	-0.09%	56	75	-19	14	-295.7%
Grand	9,664	9,705	40	0.41%	95	68	27	13	32.7%
Iron	57,658	61,232	3,574	6.20%	746	398	348	3,226	90.3%
Juab	11,831	12,049	217	1.84%	212	86	126	91	42.1%
Kane	7,692	7,924	232	3.01%	84	87	-3	235	101.3%
Millard	13,010	13,214	203	1.56%	189	139	50	153	75.4%
Morgan	12,353	12,679	325	2.63%	140	78	62	263	80.9%
Piute	1,442	1,479	37	2.58%	19	17	2	35	94.6%
Rich	2,517	2,559	43	1.70%	32	13	19	24	55.5%
Salt Lake	1,188,213	1,197,551	9,338	0.79%	14,908	7,918	6,990	2,348	25.1%
San Juan	14,541	14,647	107	0.73%	169	134	35	72	67.2%
Sanpete	28,560	28,948	388	1.36%	369	264	105	283	72.9%
Sevier	21,571	21,799	228	1.06%	283	246	37	191	83.8%
Summit	42,394	42,843	147	0.61%	412	178	234	215	47.9%
Tooele	73,149	76,156	449	1.06%	1,057	461	596	2,411	80.2%
Uintah	35,679	35,975	3,007	4.11%	531	343	188	108	36.4%
Utah	664,258	683,625	296	0.83%	11,850	3,151	8,699	10,668	55.1%
Wasatch	34,933	35,872	19,367	2.92%	381	192	189	750	79.9%
Washington	182,111	189,432	939	2.69%	2,249	1,783	466	6,855	93.6%
Wayne	2,490	2,504	7,321	4.02%	40	41	-1	15	107.2%
Weber	262,727	265,635	14	0.56%	3,484	2,094	1,390	1,519	52.2%
Economic Regions									
East Central	30,273	30,373	100	0.33%	339	389	-50	150	149.9%
Greater Salt Lake	2,847,422	2,893,388	45,966	1.61%	40,114	17,537	22,577	23,389	50.9%
Southeast	24,205	24,352	147	0.61%	264	202	62	85	57.7%
Southwest	259,621	270,823	11,202	4.31%	3,225	2,415	810	10,392	92.8%
Uintah Basin	56,230	56,674	444	0.79%	791	515	276	168	37.9%
West Central	67,073	67,943	870	1.30%	900	707	193	677	77.8%
State of Utah	3,284,823	3,343,552	58,729	1.79%	45,639	21,768	23,871	34,858	59.4%

Note: Delineated by The Gardner Institute in 2020, the Economic Regions are multiregion counties consider the commutershed and consider economic connections. The counties that make up the regions are: East Central - Carbon and Emery; Greater Salt Lake - Box Elder, Cache, Davis, Juab, Morgan, Rich, Salt Lake, Summit, Tooele, Utah, Wasatch, and Weber; Southeast - Grand and San Juan; Southwest - Beaver, Iron, Garfield, Kane, and Washington; Uintah Basin - Daggett, Duchesne, and Uintah; West Central - Millard, Piute, Sanpete, Sevier, and Wayne.
Source: Utah Population Committee, Kem C. Gardner Policy Institute (July 1, 2020-2021).

Table 1.3: Utah Intercensal Population Estimates by County

	UPC Estimates											2019-2020		2020
	July 1, 2010	July 1, 2011	July 1, 2012	July 1, 2013	July 1, 2014	July 1, 2015	July 1, 2016	July 1, 2017	July 1, 2018	July 1, 2019	July 1, 2020	Absolute Change	Percent Change	% of Total Population
Beaver	6,645	6,668	6,689	6,782	6,697	6,755	6,835	6,906	6,981	7,055	7,076	21	0.3%	0.2%
Box Elder	50,084	50,725	51,308	52,016	52,571	53,327	54,464	55,463	56,245	56,956	57,886	930	1.6%	1.8%
Cache	113,307	115,004	116,405	117,600	118,876	121,874	123,927	126,491	128,888	131,388	133,743	2,355	1.8%	4.1%
Carbon	21,390	21,358	21,324	20,958	20,702	20,549	20,456	20,355	20,423	20,391	20,449	58	0.3%	0.6%
Daggett	1,076	1,099	1,096	1,131	1,079	1,071	1,053	915	915	918	943	25	2.7%	0.0%
Davis	307,712	313,717	319,263	325,546	331,327	337,940	344,842	351,297	355,688	360,196	363,419	3,223	0.9%	11.1%
Duchesne	18,689	18,859	19,407	19,865	20,031	20,147	19,805	19,896	19,790	19,657	19,608	-49	-0.2%	0.6%
Emery	10,991	11,023	10,775	10,673	10,488	10,221	10,052	10,064	9,977	9,890	9,824	-66	-0.7%	0.3%
Garfield	5,167	5,185	5,193	5,173	5,133	5,088	5,100	5,134	5,109	5,092	5,084	-8	-0.2%	0.2%
Grand	9,227	9,340	9,431	9,412	9,446	9,536	9,671	9,743	9,903	9,715	9,664	-51	-0.5%	0.3%
Iron	46,241	47,052	47,486	47,875	48,525	49,821	51,235	52,844	54,795	56,122	57,658	1,536	2.7%	1.8%
Juab	10,260	10,279	10,304	10,343	10,482	10,650	11,039	11,215	11,514	11,711	11,831	120	1.0%	0.4%
Kane	7,113	7,184	7,274	7,281	7,215	7,207	7,505	7,467	7,615	7,600	7,692	92	1.2%	0.2%
Millard	12,513	12,597	12,619	12,672	12,651	12,646	12,745	12,844	12,865	12,934	13,010	76	0.6%	0.4%
Morgan	9,516	9,705	10,033	10,396	10,747	11,045	11,479	11,675	11,906	12,125	12,353	228	1.9%	0.4%
Piute	1,548	1,540	1,521	1,510	1,473	1,482	1,426	1,401	1,428	1,449	1,442	-7	-0.5%	0.0%
Rich	2,280	2,303	2,297	2,330	2,363	2,403	2,415	2,437	2,504	2,483	2,517	34	1.4%	0.1%
Salt Lake	1,032,281	1,049,380	1,065,591	1,078,405	1,090,830	1,106,942	1,123,506	1,145,202	1,161,347	1,174,562	1,188,213	13,651	1.2%	36.2%
San Juan	14,715	14,759	14,947	14,854	14,835	14,749	14,931	14,717	14,651	14,617	14,541	-76	-0.5%	0.4%
Sanpete	27,834	27,984	27,825	27,678	27,458	27,548	27,656	27,905	28,157	28,288	28,560	272	1.0%	0.9%
Sevier	20,793	20,788	20,863	20,746	20,743	20,798	20,992	21,154	21,232	21,438	21,571	133	0.6%	0.7%
Summit	36,573	37,449	38,032	38,350	38,858	39,502	40,316	41,078	41,634	42,215	42,394	179	0.4%	1.3%
Tooele	58,369	59,208	60,233	61,516	62,378	63,506	65,575	67,465	69,235	71,312	73,149	1,837	2.6%	2.2%
Uintah	32,722	33,752	34,703	35,649	36,331	36,595	35,627	35,503	35,660	35,558	35,679	121	0.3%	1.1%
Utah	518,707	531,930	543,411	552,265	564,419	582,261	599,268	612,960	628,149	645,315	664,258	18,943	2.9%	20.2%
Wasatch	23,689	24,671	25,877	26,874	27,976	29,397	30,928	32,303	33,365	34,242	34,933	691	2.0%	1.1%
Washington	138,435	141,076	142,763	145,187	148,057	151,588	156,766	161,411	166,285	175,215	182,111	6,896	3.9%	5.5%
Wayne	2,775	2,731	2,710	2,657	2,621	2,579	2,545	2,536	2,522	2,496	2,490	-6	-0.2%	0.1%
Weber	232,014	234,726	238,024	240,280	242,673	246,564	250,224	254,097	257,559	260,168	262,727	2,559	1.0%	8.0%
MCD														
Bear River	165,671	168,032	170,010	171,946	173,810	177,604	180,806	184,391	187,637	190,827	194,146	3,319	1.7%	5.9%
Central	75,723	75,919	75,842	75,606	75,428	75,703	76,403	77,055	77,718	78,316	78,904	588	0.8%	2.4%
Mountainland	578,969	594,050	607,320	617,489	631,253	651,160	670,512	686,341	703,148	721,772	741,585	19,813	2.7%	22.6%
Southeastern	56,323	56,480	56,477	55,897	55,471	55,055	55,110	54,879	54,954	54,613	54,478	-135	-0.2%	1.7%
Southwestern	203,601	207,165	209,405	212,298	215,627	220,459	227,441	233,762	240,785	251,084	259,621	8,537	3.4%	7.9%
Uintah Basin	52,487	53,710	55,206	56,645	57,441	57,813	56,485	56,314	56,365	56,133	56,230	97	0.2%	1.7%
Wasatch Front	1,639,892	1,666,736	1,693,144	1,716,143	1,737,955	1,765,997	1,795,626	1,829,736	1,855,735	1,878,363	1,899,861	21,498	1.1%	57.8%
State of Utah	2,772,667	2,822,091	2,867,404	2,906,022	2,946,989	3,003,792	3,062,384	3,122,477	3,176,342	3,231,108	3,284,823	53,715	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: Utah Population Committee, Kem C. Gardner Policy Institute (2010-2020).

Table 1.4: 2020 Decennial Census National and State Populations

	April 1, 2010		April 1, 2020		2010-2020		
	Population	Rank	Population	Rank	Absolute Change	Percent Change	% Change Rank
United States	**308,745,538**		**331,449,281**		**22,703,743**	**7.4%**	
Region							
Northeast	55,317,240	4	57,609,148	4	2,291,908	4.1%	3
Midwest	66,927,001	3	68,985,454	3	2,058,453	3.1%	4
South	114,555,744	1	126,266,107	1	11,710,363	10.2%	1
West	71,945,553	2	78,588,572	2	6,643,019	9.2%	2
State							
Alabama	4,779,736	23	5,024,279	24	244,543	5.1%	28
Alaska	710,231	47	733,391	48	23,160	3.3%	37
Arizona	6,392,017	16	7,151,502	14	759,485	11.9%	10
Arkansas	2,915,918	32	3,011,524	33	95,606	3.3%	36
California	37,253,956	1	39,538,223	1	2,284,267	6.1%	25
Colorado	5,029,196	22	5,773,714	21	744,518	14.8%	6
Connecticut	3,574,097	29	3,605,944	29	31,847	0.9%	48
Delaware	897,934	45	989,948	45	92,014	10.2%	14
District of Columbia	601,723	50	689,545	49	87,822	14.6%	7
Florida	18,801,310	4	21,538,187	3	2,736,877	14.6%	9
Georgia	9,687,653	9	10,711,908	8	1,024,255	10.6%	13
Hawaii	1,360,301	40	1,455,271	40	94,970	7.0%	24
Idaho	1,567,582	39	1,839,106	38	271,524	17.3%	2
Illinios	12,830,632	5	12,812,508	6	-18,124	-0.1%	49
Indiana	6,483,802	15	6,785,528	17	301,726	4.7%	30
Iowa	3,046,355	30	3,190,369	31	144,014	4.7%	29
Kansas	2,853,118	33	2,937,880	35	84,762	3.0%	38
Kentucky	4,339,367	26	4,505,836	26	166,469	3.8%	34
Louisiana	4,533,372	25	4,657,757	25	124,385	2.7%	42
Maine	1,328,361	41	1,362,359	42	33,998	2.6%	43
Maryland	5,773,552	19	6,177,224	18	403,672	7.0%	23
Massachusetts	6,547,629	14	7,029,917	15	482,288	7.4%	22
Michigan	9,883,640	8	10,077,331	10	193,691	2.0%	47
Minnesota	5,303,925	21	5,706,494	22	402,569	7.6%	20
Mississippi	2,967,297	31	2,961,279	34	-6,018	-0.2%	50
Missouri	5,988,927	18	6,154,913	19	165,986	2.8%	40
Montana	989,415	44	1,084,225	44	94,810	9.6%	15
Nebraska	1,826,341	38	1,961,504	37	135,163	7.4%	21
Nevada	2,700,551	35	3,104,614	32	404,063	15.0%	5
New Hampshire	1,316,470	42	1,377,529	41	61,059	4.6%	31
New Jersey	8,791,894	11	9,288,994	11	497,100	5.7%	26
New Mexico	2,059,179	36	2,117,522	36	58,343	2.8%	39
New York	19,378,102	3	20,201,249	4	823,147	4.2%	33
North Carolina	9,535,483	10	10,439,388	9	903,905	9.5%	16
North Dakota	672,591	48	779,094	47	106,503	15.8%	4
Ohio	11,536,504	7	11,799,448	7	262,944	2.3%	46
Oklahoma	3,751,351	28	3,959,353	28	208,002	5.5%	27
Oregon	3,831,074	27	4,237,256	27	406,182	10.6%	12
Pennsylvania	12,702,379	6	13,002,700	5	300,321	2.4%	44
Rhode Island	1,052,567	43	1,097,379	43	44,812	4.3%	32
South Carolina	4,625,364	24	5,118,425	23	493,061	10.7%	11
South Dakota	814,180	46	886,667	46	72,487	8.9%	17
Tennessee	6,346,105	17	6,910,840	16	564,735	8.9%	18
Texas	25,145,561	2	29,145,505	2	3,999,944	15.9%	3
Utah	2,763,885	34	3,271,616	30	507,731	18.4%	1
Vermont	625,741	49	643,077	50	17,336	2.8%	41
Virginia	8,001,024	12	8,631,393	12	630,369	7.9%	19
Washington	6,724,540	13	7,705,281	13	980,741	14.6%	8
West Virginia	1,852,994	37	1,793,716	39	-59,278	-3.2%	51
Wisconsin	5,686,986	20	5,893,718	20	206,732	3.6%	35
Wyoming	563,626	51	576,851	51	13,225	2.3%	45

Source: U.S. Census Bureau, 2010 and 2020 Decennial Census

Table 1.5: Rankings of States by Over 18 and Under 18 as a Percent of Total Population, April 1, 2020

Total Population	Under 18				18 and older			
	Rank	State	Population	Percent of Total	Rank	State	Population	Percent of Total
329,484,123		United States	72,822,113	22.1%		United States	256,662,010	77.9%
3,249,879	1	Utah	929,276	28.6%	1	District of Columbia	583,228	81.8%
29,360,759	2	Texas	7,435,132	25.3%	2	Vermont	510,181	81.8%
1,826,913	3	Idaho	451,043	24.7%	3	Maine	1,101,973	81.6%
1,937,552	4	Nebraska	475,015	24.5%	4	New Hampshire	1,113,141	81.5%
892,717	5	South Dakota	218,479	24.5%	5	Rhode Island	855,276	80.9%
731,158	6	Alaska	178,731	24.4%	6	Massachusetts	5,552,051	80.5%
3,980,783	7	Oklahoma	953,520	24.0%	7	Florida	17,482,580	80.4%
2,913,805	8	Kansas	696,746	23.9%	8	West Virginia	1,428,520	80.0%
765,309	9	North Dakota	181,629	23.7%	9	Connecticut	2,838,054	79.8%
2,966,786	10	Mississippi	693,133	23.4%	10	Oregon	3,380,729	79.7%
10,710,017	11	Georgia	2,499,950	23.3%	11	Pennsylvania	10,162,497	79.5%
4,645,318	12	Louisiana	1,081,280	23.3%	12	New York	15,348,422	79.4%
6,754,953	13	Indiana	1,566,439	23.2%	13	Delaware	782,153	79.3%
3,030,522	14	Arkansas	699,714	23.1%	14	Hawaii	1,111,188	79.0%
5,657,342	15	Minnesota	1,301,219	23.0%	15	Michigan	7,839,742	78.7%
3,163,561	16	Iowa	725,559	22.9%	16	Montana	850,894	78.7%
582,328	17	Wyoming	133,091	22.9%	17	South Carolina	4,100,115	78.6%
4,477,251	18	Kentucky	1,001,917	22.4%	18	Colorado	4,557,684	78.5%
2,106,319	19	New Mexico	472,491	22.4%	19	Wisconsin	4,574,131	78.4%
39,368,078	20	California	8,791,234	22.3%	20	Virginia	6,724,143	78.3%
6,151,548	21	Missouri	1,371,429	22.3%	21	Washington	6,027,818	78.3%
7,421,401	22	Arizona	1,646,423	22.2%	22	New Jersey	6,947,836	78.2%
3,138,259	23	Nevada	697,580	22.2%	23	North Carolina	8,294,423	78.2%
4,921,532	24	Alabama	1,087,283	22.1%	24	Maryland	4,721,883	78.0%
12,587,530	25	Illinois	2,777,968	22.1%	25	Ohio	9,124,576	78.0%
6,055,802	26	Maryland	1,333,919	22.0%	26	Tennessee	5,373,433	78.0%
11,693,217	27	Ohio	2,568,641	22.0%	27	Alabama	3,834,249	77.9%
6,886,834	28	Tennessee	1,513,401	22.0%	28	Illinois	9,809,562	77.9%
8,882,371	29	New Jersey	1,934,535	21.8%	29	Arizona	5,774,978	77.8%
10,600,823	30	North Carolina	2,306,400	21.8%	30	Nevada	2,440,679	77.8%
8,590,563	31	Virginia	1,866,420	21.7%	31	California	30,576,844	77.7%
7,693,612	32	Washington	1,665,794	21.7%	32	Missouri	4,780,119	77.7%
5,832,655	33	Wisconsin	1,258,524	21.6%	33	Kentucky	3,475,334	77.6%
5,807,719	34	Colorado	1,250,035	21.5%	34	New Mexico	1,633,828	77.6%
5,218,040	35	South Carolina	1,117,925	21.4%	35	Iowa	2,438,002	77.1%
9,966,555	36	Michigan	2,126,813	21.3%	36	Wyoming	449,237	77.1%
1,080,577	37	Montana	229,683	21.3%	37	Minnesota	4,356,123	77.0%
1,407,006	38	Hawaii	295,818	21.0%	38	Arkansas	2,330,808	76.9%
986,809	39	Delaware	204,656	20.7%	39	Indiana	5,188,514	76.8%
19,336,776	40	New York	3,988,354	20.6%	40	Georgia	8,210,067	76.7%
12,783,254	41	Pennsylvania	2,620,757	20.5%	41	Louisiana	3,564,038	76.7%
4,241,507	42	Oregon	860,778	20.3%	42	Mississippi	2,273,653	76.6%
3,557,006	43	Connecticut	718,952	20.2%	43	North Dakota	583,680	76.3%
1,784,787	44	West Virginia	356,267	20.0%	44	Kansas	2,217,059	76.1%
21,733,312	45	Florida	4,250,732	19.6%	45	Oklahoma	3,027,263	76.0%
6,893,574	46	Massachusetts	1,341,523	19.5%	46	Alaska	552,427	75.6%
1,057,125	47	Rhode Island	201,849	19.1%	47	Nebraska	1,462,537	75.5%
1,366,275	48	New Hampshire	253,134	18.5%	48	South Dakota	674,238	75.5%
1,350,141	49	Maine	248,168	18.4%	49	Idaho	1,375,870	75.3%
712,816	50	District of Columbia	129,588	18.2%	50	Texas	21,925,627	74.7%
623,347	51	Vermont	113,166	18.2%	51	Utah	2,320,603	71.4%

Source: U.S. Census Bureau, 2020 Census Redistricting Data (PL 94-171) Summary File

Table 1.6: 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	2019	1.99	1.71

Note: This table provides the latest available data. 2020 data was not available at time of publication.
Source: National Center for Health Statistics

Table 1.7: Components of Population Change Annual Rates, July 1, 2020–July 1, 2021

(Rate per 1,000 people)

Rank	Births		Deaths		Naural Increase		Net Migration	
	State	Rate	State	Rate	State	Rate	State	Rate
	United States	10.8	United States	10.4	United States	0.4	United States	0.7
1	Utah	13.6	West Virginia	15.2	Utah	6.9	Idaho	26.3
2	District of Columbia	12.8	Mississippi	12.9	Alaska	5.0	Montana	18.1
3	Alaska	12.7	Maine	12.9	Texas	3.9	Arizona	13.5
4	North Dakota	12.6	Alabama	12.9	District of Columbia	3.2	South Carolina	13.2
5	Texas	12.3	Arkansas	12.7	North Dakota	2.8	Delaware	12.9
6	South Dakota	12.2	Kentucky	12.6	Idaho	2.3	Florida	12.0
7	Louisiana	12.1	Oklahoma	12.3	California	2.3	Maine	12.0
8	Nebraska	12.0	Pennsylvania	12.3	Nebraska	2.2	New Hampshire	10.7
9	Oklahoma	11.9	Ohio	12.3	Colorado	2.2	Utah	10.1
10	Mississippi	11.8	Tennessee	12.2	South Dakota	1.9	Tennessee	9.1
11	Arkansas	11.6	South Carolina	12.1	Minnesota	1.7	North Carolina	9.1
12	Kansas	11.5	Louisiana	11.9	Georgia	1.5	Nevada	8.8
13	Indiana	11.4	Missouri	11.9	Washington	1.3	Vermont	7.6
14	Idaho	11.4	Florida	11.8	Virginia	1.0	South Dakota	7.4
15	Georgia	11.3	Delaware	11.7	New York	0.9	Texas	6.7
16	Kentucky	11.3	Michigan	11.7	Hawaii	0.9	Oklahoma	6.6
17	Iowa	11.2	Indiana	11.3	Maryland	0.9	Arkansas	5.6
18	Alabama	11.2	Iowa	11.1	Kansas	0.8	Georgia	5.4
19	Missouri	11.2	North Carolina	11.0	Nevada	0.7	Alabama	4.6
20	Tennessee	11.1	Montana	11.0	New Jersey	0.5	Missouri	2.9
21	Minnesota	11.0	New Hampshire	11.0	Wyoming	0.3	Indiana	2.8
22	Hawaii	11.0	Rhode Island	10.9	Illinois	0.2	Connecticut	2.7
23	Ohio	10.9	New Mexico	10.9	Louisiana	0.1	Colorado	2.5
24	North Carolina	10.9	Kansas	10.7	Arizona	0.1	Kentucky	2.5
25	Maryland	10.8	Vermont	10.7	Indiana	0.1	Wyoming	2.4
26	Nevada	10.8	Wisconsin	10.7	Iowa	0.1	Oregon	2.2
27	California	10.8	Oregon	10.5	North Carolina	-0.2	West Virginia	1.6
28	Virginia	10.8	Arizona	10.5	Wisconsin	-0.4	Rhode Island	1.4
29	Wyoming	10.7	Wyoming	10.5	Oklahoma	-0.5	Iowa	1.2
30	South Carolina	10.6	Connecticut	10.4	New Mexico	-0.5	Washington	1.2
31	Arizona	10.6	South Dakota	10.3	Massachusetts	-0.6	Wisconsin	0.9
32	New York	10.5	Illinois	10.2	Missouri	-0.7	Ohio	0.3
33	Washington	10.5	Nevada	10.2	Arkansas	-1.1	Pennsylvania	0.3
34	Colorado	10.5	Hawaii	10.1	Tennessee	-1.1	Virginia	0.2
35	Illinois	10.5	Massachusetts	10.1	Mississippi	-1.1	New Mexico	-0.3
36	New Mexico	10.4	Maryland	10.0	Oregon	-1.1	Michigan	-0.4
37	Delaware	10.3	Virginia	9.8	Ohio	-1.3	Nebraska	-1.2
38	New Jersey	10.3	Nebraska	9.8	Delaware	-1.3	Mississippi	-1.3
39	Wisconsin	10.2	Georgia	9.8	Kentucky	-1.4	Kansas	-1.3
40	Michigan	10.2	North Dakota	9.8	Connecticut	-1.4	Minnesota	-1.6
41	Pennsylvania	9.9	New Jersey	9.8	Montana	-1.4	New Jersey	-1.9
42	Florida	9.7	District of Columbia	9.6	Michigan	-1.4	Maryland	-2.1
43	West Virginia	9.6	New York	9.6	South Carolina	-1.5	Alaska	-4.6
44	Montana	9.6	Minnesota	9.4	Alabama	-1.7	Massachusetts	-4.8
45	Massachusetts	9.5	Washington	9.2	Rhode Island	-2.1	Louisiana	-6.0
46	Oregon	9.4	Idaho	9.0	Florida	-2.1	North Dakota	-7.9
47	Connecticut	9.1	Texas	8.5	Pennsylvania	-2.4	Hawaii	-8.0
48	Rhode Island	8.9	California	8.4	New Hampshire	-2.7	California	-9.0
49	Maine	8.3	Colorado	8.3	Vermont	-2.8	Illinois	-9.2
50	New Hampshire	8.3	Alaska	7.7	Maine	-4.6	New York	-16.7
51	Vermont	7.9	Utah	6.7	West Virginia	-5.5	District of Columbia	-32.2

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 2021 Estimates

Table 1.8: Housing Units, Occupancy, and Vacancy Rates by State

	2010			2020			2010 to 2020 Percent Change		
	Total Occupied Units	Total Vacant Units	Total Housing Units	Total Occupied Units	Total Vacant Units	Total Housing Units	Total Occupied Units	Total Vacant Units	Total Housing Units
United States	116,716,292	14,988,438	131,704,730	126,817,580	13,681,156	140,498,736	8.7%	-8.7%	6.7%
Alabama	1,883,791	288,062	2,171,853	2,011,947	276,383	2,288,330	6.8%	-4.1%	5.4%
Alaska	258,058	48,909	306,967	269,148	57,052	326,200	4.3%	16.6%	6.3%
Arizona	2,380,990	463,536	2,844,526	2,705,878	376,122	3,082,000	13.6%	-18.9%	8.3%
Arkansas	1,147,084	169,215	1,316,299	1,199,395	165,870	1,365,265	4.6%	-2.0%	3.7%
California	12,577,498	1,102,583	13,680,081	13,475,623	916,517	14,392,140	7.1%	-16.9%	5.2%
Colorado	1,972,868	240,030	2,212,898	2,257,815	233,589	2,491,404	14.4%	-2.7%	12.6%
Connecticut	1,371,087	116,804	1,487,891	1,418,069	112,128	1,530,197	3.4%	-4.0%	2.8%
Delaware	342,297	63,588	405,885	386,375	62,360	448,735	12.9%	-1.9%	10.6%
District of Columbia	266,707	30,012	296,719	312,448	37,916	350,364	17.2%	26.3%	18.1%
Florida	7,420,802	1,568,778	8,989,580	8,529,067	1,336,283	9,865,350	14.9%	-14.8%	9.7%
Georgia	3,585,584	503,217	4,088,801	4,020,808	390,148	4,410,956	12.1%	-22.5%	7.9%
Hawaii	455,338	64,170	519,508	490,267	70,799	561,066	7.7%	10.3%	8.0%
Idaho	579,408	88,388	667,796	676,206	75,653	751,859	16.7%	-14.4%	12.6%
Illinois	4,836,972	459,743	5,296,715	4,998,395	428,034	5,426,429	3.3%	-6.9%	2.4%
Indiana	2,502,154	293,387	2,795,541	2,667,542	255,633	2,923,175	6.6%	-12.9%	4.6%
Iowa	1,221,576	114,841	1,336,417	1,288,560	124,229	1,412,789	5.5%	8.2%	5.7%
Kansas	1,112,096	121,119	1,233,215	1,151,360	124,329	1,275,689	3.5%	2.7%	3.4%
Kentucky	1,719,965	207,199	1,927,164	1,797,937	196,386	1,994,323	4.5%	-5.2%	3.5%
Louisiana	1,728,360	236,621	1,964,981	1,831,610	241,590	2,073,200	6.0%	2.1%	5.5%
Maine	557,219	164,611	721,830	582,437	156,635	739,072	4.5%	-4.8%	2.4%
Maryland	2,156,411	222,403	2,378,814	2,321,208	209,636	2,530,844	7.6%	-5.7%	6.4%
Massachusetts	2,547,075	261,179	2,808,254	2,749,225	249,312	2,998,537	7.9%	-4.5%	6.8%
Michigan	3,872,508	659,725	4,532,233	4,041,760	528,413	4,570,173	4.4%	-19.9%	0.8%
Minnesota	2,087,227	259,974	2,347,201	2,253,990	231,568	2,485,558	8.0%	-10.9%	5.9%
Mississippi	1,115,768	158,951	1,274,719	1,158,193	161,752	1,319,945	3.8%	1.8%	3.5%
Missouri	2,375,611	337,118	2,712,729	2,479,146	307,475	2,786,621	4.4%	-8.8%	2.7%
Montana	409,607	73,218	482,825	447,812	66,991	514,803	9.3%	-8.5%	6.6%
Nebraska	721,130	75,663	796,793	773,312	70,966	844,278	7.2%	-6.2%	6.0%
Nevada	1,006,250	167,564	1,173,814	1,177,649	103,369	1,281,018	17.0%	-38.3%	9.1%
New Hampshire	518,973	95,781	614,754	556,357	82,438	638,795	7.2%	-13.9%	3.9%
New Jersey	3,214,360	339,202	3,553,562	3,426,102	335,127	3,761,229	6.6%	-1.2%	5.8%
New Mexico	791,395	109,993	901,388	829,514	111,345	940,859	4.8%	1.2%	4.4%
New York	7,317,755	790,348	8,108,103	7,715,172	772,894	8,488,066	5.4%	-2.2%	4.7%
North Carolina	3,745,155	582,373	4,327,528	4,160,856	547,854	4,708,710	11.1%	-5.9%	8.8%
North Dakota	281,192	36,306	317,498	322,553	48,089	370,642	14.7%	32.5%	16.7%
Ohio	4,603,435	524,073	5,127,508	4,808,773	433,751	5,242,524	4.5%	-17.2%	2.2%
Oklahoma	1,460,450	203,928	1,664,378	1,535,830	210,977	1,746,807	5.2%	3.5%	5.0%
Oregon	1,518,938	156,624	1,675,562	1,671,983	141,764	1,813,747	10.1%	-9.5%	8.2%
Pennsylvania	5,018,904	548,411	5,567,315	5,210,598	532,230	5,742,828	3.8%	-3.0%	3.2%
Rhode Island	413,600	49,788	463,388	441,274	42,200	483,474	6.7%	-15.2%	4.3%
South Carolina	1,801,181	336,502	2,137,683	2,048,912	296,051	2,344,963	13.8%	-12.0%	9.7%
South Dakota	322,282	41,156	363,438	350,560	42,815	393,375	8.8%	4.0%	8.2%
Tennessee	2,493,552	318,581	2,812,133	2,742,947	288,658	3,031,605	10.0%	-9.4%	7.8%
Texas	8,922,933	1,054,503	9,977,436	10,491,147	1,098,177	11,589,324	17.6%	4.1%	16.2%
Utah	877,692	102,017	979,709	1,057,252	94,162	1,151,414	20.5%	-7.7%	17.5%
Vermont	256,442	66,097	322,539	271,890	62,428	334,318	6.0%	-5.6%	3.7%
Virginia	3,056,058	308,881	3,364,939	3,321,218	297,029	3,618,247	8.7%	-3.8%	7.5%
Washington	2,620,076	265,601	2,885,677	2,974,692	227,549	3,202,241	13.5%	-14.3%	11.0%
West Virginia	763,831	118,086	881,917	743,442	112,193	855,635	-2.7%	-5.0%	-3.0%
Wisconsin	2,279,768	344,590	2,624,358	2,428,361	299,365	2,727,726	6.5%	-13.1%	3.9%
Wyoming	226,879	34,989	261,868	234,965	36,922	271,887	3.6%	5.5%	3.8%

Note: Numbers may not sum due to rounding.
Source: U.S. Census Bureau, 2010 and 2020 Census Redistricting Data (PL 94-171) Summary File

Table 1.9: County Population by Race and Ethnicity in Utah, April 1, 2020

Geographic Area	Total Population	Race Alone (Not Hispanic or Latino)					Some Other Race and 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	3,271,616	2,465,355	37,192	28,690	78,618	35,831	133,018	492,912	806,261
Share of Total Population		75.4%	1.1%	0.9%	2.4%	1.1%	4.1%	15.1%	24.6%
Beaver	7,072	5,717	23	70	32	21	143	1,066	1,355
Box Elder	57,666	49,361	161	383	438	98	1,688	5,537	8,305
Cache	133,154	109,376	1,045	620	2,303	660	4,074	15,076	23,778
Carbon	20,412	16,645	50	199	63	29	749	2,677	3,767
Daggett	935	881	1	0	1	2	21	29	54
Davis	362,679	292,458	4,008	1,464	6,907	3,204	15,343	39,295	70,221
Duchesne	19,596	16,736	21	875	60	39	580	1,285	2,860
Emery	9,825	8,811	2	55	36	7	209	705	1,014
Garfield	5,083	4,446	5	90	30	7	121	384	637
Grand	9,669	7,481	65	330	80	11	476	1,226	2,188
Iron	57,289	47,620	375	948	621	237	2,006	5,482	9,669
Juab	11,786	10,781	11	89	32	41	258	574	1,005
Kane	7,667	6,924	27	119	59	1	215	322	743
Millard	12,975	10,636	15	100	141	13	296	1,774	2,339
Morgan	12,295	11,562	12	31	57	0	295	338	733
Piute	1,438	1,276	0	4	0	0	34	124	162
Rich	2,510	2,329	11	1	2	4	66	97	181
Salt Lake	1,185,238	800,914	21,976	7,205	50,241	21,194	51,620	232,088	384,324
San Juan	14,518	6,038	32	7,186	34	51	430	747	8,480
Sanpete	28,437	23,688	224	240	171	247	824	3,043	4,749
Sevier	21,522	19,396	65	313	40	49	606	1,053	2,126
Summit	42,357	35,108	163	67	723	42	1,517	4,737	7,249
Tooele	72,698	58,199	436	445	511	637	2,948	9,522	14,499
Uintah	35,620	28,726	90	2,277	157	97	1,439	2,834	6,894
Utah	659,399	518,460	4,110	2,533	10,111	6,541	29,113	88,531	140,939
Wasatch	34,788	28,168	141	67	347	41	978	5,046	6,620
Washington	180,279	147,462	913	1,566	1,802	1,607	6,447	20,482	32,817
Wayne	2,486	2,267	1	19	16	3	84	96	219
Weber	262,223	193,889	3,209	1,394	3,603	948	10,438	48,742	68,334

Note: As a result of the revised standards for collecting data on race and ethnicity issued by the Office of Management and Budget in 1997, the federal government treats Hispanic origin and race as separate and distinct concepts. Therefore people identifying as Hispanic or Latino may be of any race. "Minority" refers to any population outside non-Hispanic White. 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. "Minority" refers to any population outside non-Hispanic White.
Source: U.S. Census Bureau, 2020 Census Redistricting Data (PL 94-171) Summary File

Table 1.10: Total Census Population Count by County and City

	2010 Census (April 1)	2020 Census (April 1)	Change from 2010 Census to 2020	
			Percent	Number
State of Utah	**2,763,885**	**3,271,616**	**18.4%**	**507,731**
Beaver County	**6,629**	**7,072**	**6.7%**	**443**
Beaver	3,112	3,592	15.4%	480
Milford	1,409	1,431	1.6%	22
Minersville	907	807	-11.0%	-100
Balance of Beaver County	1,201	1,242	3.4%	41
Box Elder County	**49,975**	**57,666**	**15.4%**	**7,691**
Bear River City	853	877	2.8%	24
Brigham City	17,899	19,650	9.8%	1,751
Corinne	685	809	18.1%	124
Deweyville	332	417	25.6%	85
Elwood	1,034	1,173	13.4%	139
Fielding	455	546	20.0%	91
Garland	2,400	2,589	7.9%	189
Honeyville	1,441	1,606	11.5%	165
Howell	245	240	-2.0%	-5
Mantua	687	1,090	58.7%	403
Perry	4,512	5,555	23.1%	1,043
Plymouth	414	427	3.1%	13
Portage	245	273	11.4%	28
Snowville	167	163	-2.4%	211
Tremonton	7,647	9,894	29.4%	-4
Willard	1,772	1,978	11.6%	206
Balance of Box Elder County	9,187	10,379	13.0%	1,192
Cache County	**112,656**	**133,154**	**18.2%**	**20,498**
Amalga	488	482	-1.2%	-6
Clarkston	666	749	12.5%	83
Cornish	288	274	-4.9%	-14
Hyde Park	3,833	5,234	36.6%	1,401
Hyrum	7,609	9,362	23.0%	1,753
Lewiston	1,766	1,939	9.8%	173
Logan	48,174	52,778	9.6%	4,604
Mendon	1,282	1,339	4.5%	57
Millville	1,829	2,326	27.2%	497
Newton	789	789	0.0%	0
Nibley	5,438	7,328	34.8%	1,890
North Logan	8,269	10,986	32.9%	2,717
Paradise	904	971	7.4%	67
Providence	7,075	8,218	16.2%	1,143
Richmond	2,470	2,914	18.0%	444
River Heights	1,734	2,144	23.6%	410
Smithfield	9,495	13,571	42.9%	4,076
Trenton	464	512	10.3%	48
Wellsville	3,432	4,060	18.3%	628
Balance of Cache County	6,651	7,178	7.9%	527
Carbon County	**21,403**	**20,412**	**-4.6%**	**-991**
East Carbon	1,301	1,556	19.6%	255
Helper	2,201	2,112	-4.0%	-89
Price	8,715	8,216	-5.7%	-499
Scofield	24	26	8.3%	2
Wellington	1,676	1,605	-4.2%	-71
Balance of Carbon County	7,109	6,897	-3.0%	-212

Daggett County	**1,059**	**935**	**-11.7%**	**-124**
Dutch John	145	141	-0.7%	-2
Manila	310	308	-2.8%	-4
Balance of Daggett County	749	486	-35.1%	-263
Davis County	**306,479**	**362,679**	**18.3%**	**56,200**
Bountiful	42,552	45,762	7.5%	3,210
Centerville	15,335	16,884	10.1%	1,549
Clearfield	30,112	31,909	6.0%	1,797
Clinton	20,426	23,386	14.5%	2,960
Farmington	18,275	24,531	34.2%	6,256
Fruit Heights	4,987	6,101	22.3%	1,114
Kaysville	27,300	32,945	20.7%	5,645
Layton	67,311	81,773	21.5%	14,462
North Salt Lake	16,322	21,907	34.2%	5,585
South Weber	6,051	7,867	30.0%	1,816
Sunset	5,122	5,475	6.9%	353
Syracuse	24,331	32,141	32.1%	7,810
West Bountiful	5,265	5,917	12.4%	652
West Point	9,511	10,963	15.3%	1,452
Woods Cross	9,761	11,410	16.9%	1,649
Balance of Davis County	3,818	3,708	-2.9%	-110
Duchesne County	**18,607**	**19,596**	**5.3%**	**989**
Altamont	225	239	6.2%	14
Duchesne	1,690	1,588	-6.0%	-102
Myton	569	561	-1.4%	-8
Roosevelt	6,046	6,747	11.6%	701
Tabiona	171	143	-16.4%	-28
Balance of Duchesne County	9,906	10,318	4.2%	412
Emery County	**10,976**	**9,825**	**-10.5%**	**-1,151**
Castle Dale	1,630	1,492	-8.5%	-138
Clawson	163	162	-0.6%	-1
Cleveland	464	497	7.1%	33
Elmo	418	405	-3.1%	-13
Emery	288	307	6.6%	19
Ferron	1,626	1,474	-9.4%	-152
Green River	952	847	-11.0%	-105
Huntington	2,129	1,914	-10.1%	-215
Orangeville	1,470	1,224	-16.7%	-246
Balance of Emery County	1,836	1,503	-18.1%	-333
Garfield County	**5,172**	**5,083**	**-1.7%**	**-89**
Antimony	122	118	-3.3%	-4
Boulder	226	227	0.4%	1
Bryce Canyon City	198	336	69.7%	138
Cannonville	167	186	11.4%	19
Escalante	797	786	-1.4%	-11
Hatch	133	132	-0.8%	-1
Henrieville	230	221	-3.9%	-9
Panguitch	1,520	1,725	13.5%	205
Tropic	530	486	-8.3%	-44
Balance of Garfield County	1,249	866	-30.7%	-383
Grand County	**9,225**	**9,669**	**4.8%**	**444**
Castle Valley	319	347	8.8%	28
Moab	5,046	5,366	6.3%	320
Balance of Grand County	3,860	3,956	2.5%	96

Iron County	**46,163**	**57,289**	**24.1%**	**11,126**
Brian Head	83	151	81.9%	68
Cedar City	28,857	35,235	22.1%	6,378
Cedar Highlands	A	99	N/A	N/A
Enoch	5,803	7,374	27.1%	1,571
Kanarraville	355	442	24.5%	87
Paragonah	488	536	9.8%	48
Parowan	2,790	2,996	7.4%	206
Balance of Iron County	7,787	10,456	34.3%	2,669
Juab County	**10,246**	**11,786**	**15.0%**	**1,540**
Eureka	669	662	-1.1%	-7
Levan	841	862	2.5%	21
Mona	1,547	1,750	13.1%	203
Nephi	5,389	6,443	19.6%	1,054
Rocky Ridge	733	848	15.7%	115
Santaquin (pt.)	0	0	0.0%	0
Balance of Juab County	1,067	1,221	14.4%	154
Kane County	**7,125**	**7,667**	**7.6%**	**542**
Alton	119	118	-0.8%	-1
Big Water	475	449	-5.5%	-26
Glendale	381	312	-18.1%	-69
Kanab	4,312	4,683	8.6%	371
Orderville	577	598	3.6%	21
Balance of Kane County	1,261	1,507	19.5%	246
Millard County	**12,503**	**12,975**	**3.8%**	**472**
Delta	3,436	3,622	5.4%	186
Fillmore	2,435	2,592	6.5%	157
Hinckley	696	614	-11.8%	-82
Holden	378	438	15.9%	60
Kanosh	474	508	7.2%	34
Leamington	226	256	13.3%	30
Lynndyl	106	111	4.7%	5
Meadow	310	320	3.2%	10
Oak City	578	595	2.9%	17
Scipio	327	353	8.0%	26
Balance of Millard County	3,537	3,566	0.8%	29
Morgan County	**9,469**	**12,295**	**29.8%**	**2,826**
Morgan	3,687	4,071	10.4%	384
Balance of Morgan County	5,782	8,224	42.2%	2,442
Piute County	**1,556**	**1,438**	**-7.6%**	**-118**
Circleville	547	550	0.6%	3
Junction	191	212	11.0%	21
Kingston	173	135	-22.0%	-38
Marysvale	408	356	-12.8%	-52
Balance of Piute County	237	185	-21.9%	-52
Rich County	**2,264**	**2,510**	**10.9%**	**246**
Garden City	562	602	7.1%	40
Laketown	248	299	0.7%	3
Randolph	464	467	20.6%	51
Woodruff	180	169	-6.1%	-11
Balance of Rich County	810	973	20.1%	163

Salt Lake County	**1,029,655**	**1,185,238**	**15.1%**	**155,583**
Alta	383	228	-40.5%	-155
Bluffdale (pt.)	7,598	17,014	123.9%	9,416
Brighton	A	432	N/A	N/A
Copperton	826	829	0.4%	3
Cottonwood Heights	33,433	33,617	0.6%	184
Draper (pt.)	42,274	47,733	20.7%	8,743
Emigration Canyon	1,567	1,466	-6.5%	-101
Herriman	21,785	55,144	153.1%	33,359
Holladay	26,472	31,965	20.8%	5,493
Kearns	35,731	36,723	2.8%	992
Magna	26,505	29,251	10.4%	2,746
Midvale	27,964	36,028	28.8%	8,064
Millcreek	62,139	63,380	2.0%	1,241
Murray	46,746	50,637	8.3%	3,891
Riverton	38,753	45,285	16.9%	6,532
Salt Lake City	186,440	199,723	7.1%	13,283
Sandy	87,461	96,904	10.8%	9,443
South Jordan	50,418	77,487	53.7%	27,069
South Salt Lake	23,617	26,777	13.4%	3,160
Taylorsville	58,652	60,448	3.1%	1,796
West Jordan	103,712	116,961	12.8%	13,249
West Valley City	129,480	140,230	8.3%	10,750
White City	5,407	5,522	2.1%	115
Balance of Salt Lake County	146,209	11,454	-92.2%	-134,755
San Juan County	**14,746**	**14,518**	**-1.6%**	**-228**
Blanding	3,375	3,394	0.6%	19
Bluff	258	240	-7.0%	-18
Monticello	1,972	1,824	-7.5%	-148
Balance of San Juan County	9,399	9,060	-3.6%	-339
Sanpete County	**27,822**	**28,437**	**2.2%**	**615**
Centerfield	1,367	1,341	-1.9%	-26
Ephraim	6,135	5,611	-8.5%	-524
Fairview	1,247	1,203	-3.5%	-44
Fayette	242	245	1.2%	3
Fountain Green	1,071	1,197	11.8%	126
Gunnison	3,285	3,509	6.8%	224
Manti	3,276	3,429	4.7%	153
Mayfield	496	556	12.1%	60
Moroni	1,423	1,544	8.5%	121
Mount Pleasant	3,260	3,655	12.1%	395
Spring City	988	949	-4.0%	-39
Sterling	262	274	4.6%	12
Wales	302	338	11.9%	36
Balance of Sanpete County	4,468	4,586	2.6%	118
Sevier County	**20,802**	**21,522**	**3.5%**	**720**
Annabella	795	836	5.2%	41
Aurora	1,016	984	-3.2%	-32
Central Valley	528	647	22.5%	119
Elsinore	847	802	-5.3%	-45
Glenwood	464	474	2.2%	10
Joseph	344	288	-16.3%	-56
Koosharem	327	244	-25.4%	-83
Monroe	2,256	2,515	11.5%	259
Redmond	730	762	4.4%	32

Richfield	7,551	8,201	8.6%	650
Salina	2,489	2,441	-1.9%	-48
Sigurd	429	405	-5.6%	-24
Balance of Sevier County	3,026	2,923	-3.4%	-103
Summit County	**36,324**	**42,357**	**16.6%**	**6,033**
Coalville	1,363	1,486	9.0%	123
Francis	1,077	1,564	45.2%	487
Henefer	766	838	9.4%	72
Kamas	1,811	2,092	15.5%	281
Oakley	1,470	1,588	8.0%	118
Park City (pt.)	7,547	8,378	11.0%	831
Balance of Summit County	22,290	26,411	18.5%	4,121
Tooele County	**58,218**	**72,698**	**24.9%**	**14,480**
Grantsville	8,893	12,617	41.9%	3,724
Rush Valley	447	431	-3.6%	-16
Stockton	616	621	0.8%	5
Tooele	31,605	35,742	13.1%	4,137
Vernon	243	256	5.4%	13
Wendover	1,400	1,115	-20.4%	-285
Balance of Tooele County	14,976	21,916	46.3%	6,940
Uintah County	**32,588**	**35,620**	**9.3%**	**3,032**
Ballard	801	1,131	41.2%	330
Naples	1,755	2,280	29.9%	525
Vernal	9,089	10,079	10.9%	990
Balance of Uintah County	20,943	22,130	5.7%	1,187
Utah County	**516,564**	**659,399**	**27.7%**	**142,835**
Alpine	9,555	10,251	7.3%	696
American Fork	26,263	33,337	26.9%	7,074
Bluffdale (pt.)	0	0	0.0%	0
Cedar Fort	368	427	16.0%	59
Cedar Hills	9,796	10,019	2.3%	223
Draper (pt.)	1,742	3,284	88.5%	1,542
Eagle Mountain	21,415	43,623	103.7%	22,208
Elk Ridge	2,436	4,687	92.4%	2,251
Fairfield	119	160	34.5%	41
Genola	1,370	1,548	13.0%	178
Goshen	921	978	6.2%	57
Highland	15,523	19,348	24.6%	3,825
Lehi	47,407	75,907	60.1%	28,500
Lindon	10,070	11,397	13.2%	1,327
Mapleton	7,979	11,365	42.4%	3,386
Orem	88,328	98,129	11.1%	9,801
Payson	18,294	21,101	15.3%	2,807
Pleasant Grove	33,509	37,726	12.6%	4,217
Provo	112,488	115,162	2.4%	2,674
Salem	6,423	9,298	44.8%	2,875
Santaquin (pt.)	9,128	13,710	50.2%	4,582
Saratoga Springs	17,781	37,696	112.0%	19,915
Spanish Fork	34,691	42,602	22.8%	7,911
Springville	29,466	35,268	19.7%	5,802
Vineyard	139	12,543	8923.7%	12,404
Woodland Hills	1,344	1,521	13.2%	177
Balance of Utah County	10,009	8,312	-17.0%	-1,697

Wasatch County	**23,530**	**34,788**	**47.9%**	**11,258**
Charleston	415	436	5.1%	21
Daniel	938	916	-2.4%	-22
Heber	11,362	16,856	48.4%	5,494
Hideout	656	922	40.6%	266
Independence	164	121	-26.2%	-43
Interlaken	A	179	N/A	N/A
Midway	3,845	6,003	56.1%	2,158
Park City (pt.)	11	18	63.6%	7
Wallsburg	250	290	16.0%	40
Balance of Wasatch County	5,889	9,047	53.6%	3,158
Washington County	**138,115**	**180,279**	**30.5%**	**42,164**
Apple Valley	701	855	22.0%	154
Enterprise	1,711	2,027	18.5%	316
Hildale	2,726	1,127	-58.7%	-1,599
Hurricane	13,748	20,036	45.7%	6,288
Ivins	6,753	8,978	33.0%	2,225
La Verkin	4,060	4,354	7.2%	294
Leeds	820	864	5.4%	44
New Harmony	207	236	14.0%	29
Rockville	245	226	-7.8%	-19
St. George	6,003	7,553	25.8%	1,550
Santa Clara	529	514	-2.8%	-15
Springdale	72,897	95,342	30.8%	22,445
Toquerville	1,370	1,870	36.5%	500
Virgin	596	670	12.4%	74
Washington	18,761	27,993	49.2%	9,232
Balance of Washington County	6,988	7,634	9.2%	646
Wayne County	**2,778**	**2,486**	**-10.5%**	**-292**
Bicknell	327	323	-1.2%	-4
Hanksville	219	158	-27.9%	-61
Loa	572	516	-9.8%	-56
Lyman	258	196	-24.0%	-62
Torrey	182	231	26.9%	49
Balance of Wayne County	1,220	1,062	-13.0%	-158
Weber County	**231,236**	**262,223**	**13.4%**	**30,987**
Farr West	5,928	7,691	29.7%	1,763
Harrisville	5,567	7,036	26.4%	1,469
Hooper	7,218	9,087	25.9%	1,869
Huntsville	608	573	-5.8%	-35
Marriott-Slaterville	1,701	2,135	25.5%	434
North Ogden	17,357	20,916	20.5%	3,559
Ogden	82,825	87,321	5.4%	4,496
Plain City	5,476	7,833	43.0%	2,357
Pleasant View	7,979	11,083	38.9%	3,104
Riverdale	8,426	9,343	10.9%	917
Roy	36,884	39,306	6.6%	2,422
South Ogden	16,532	17,488	5.8%	956
Uintah	1,322	1,454	10.0%	132
Washington Terrace	9,067	9,267	2.2%	200
West Haven	10,272	16,739	63.0%	6,467
Balance of Weber County	14,074	14,951	6.2%	877

A - An "A" in the 2010 Census field indicates a locality that was formed or incorporated after the 2020 Census
Source: U.S. Census Bureau, 2020 Census Redistricting Data (PL 94-171) Summary File

Table 1.11: Utah Demographic Projections by Race and Ethnicity

		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)			
Year	Total	Estimate	Share	Estimate	Share	Estimate	Share	Estimate	Share	Estimate	Share	Estimate	Share	Estimate	Share
2022	3,449,985	2,660,341	77.1%	41,579	1.2%	32,753	0.9%	89,229	2.6%	34,519	1.0%	78,639	2.3%	512,926	14.9%
2023	3,507,364	2,694,104	76.8%	43,035	1.2%	33,258	0.9%	91,989	2.6%	35,371	1.0%	81,805	2.3%	527,803	15.0%
2024	3,562,226	2,725,561	76.5%	44,488	1.2%	33,738	0.9%	94,725	2.7%	36,203	1.0%	85,003	2.4%	542,508	15.2%
2025	3,615,036	2,755,075	76.2%	45,943	1.3%	34,198	0.9%	97,450	2.7%	37,020	1.0%	88,242	2.4%	557,107	15.4%
2026	3,669,342	2,785,324	75.9%	47,445	1.3%	34,671	0.9%	100,267	2.7%	37,857	1.0%	91,610	2.5%	572,169	15.6%
2027	3,723,441	2,815,007	75.6%	48,972	1.3%	35,141	0.9%	103,115	2.8%	38,694	1.0%	95,065	2.6%	587,448	15.8%
2028	3,778,152	2,844,736	75.3%	50,535	1.3%	35,614	0.9%	106,016	2.8%	39,542	1.0%	98,630	2.6%	603,079	16.0%
2029	3,833,308	2,874,374	75.0%	52,134	1.4%	36,090	0.9%	108,966	2.8%	40,399	1.1%	102,304	2.7%	619,041	16.1%
2030	3,889,310	2,904,211	74.7%	53,773	1.4%	36,572	0.9%	111,977	2.9%	41,272	1.1%	106,101	2.7%	635,405	16.3%
2031	3,946,122	2,934,210	74.4%	55,454	1.4%	37,059	0.9%	115,049	2.9%	42,157	1.1%	110,021	2.8%	652,172	16.5%
2032	4,004,069	2,964,602	74.0%	57,181	1.4%	37,554	0.9%	118,192	3.0%	43,061	1.1%	114,079	2.8%	669,399	16.7%
2033	4,062,343	2,994,778	73.7%	58,946	1.5%	38,050	0.9%	121,384	3.0%	43,974	1.1%	118,255	2.9%	686,955	16.9%
2034	4,120,490	3,024,402	73.4%	60,742	1.5%	38,543	0.9%	124,611	3.0%	44,894	1.1%	122,539	3.0%	704,761	17.1%
2035	4,178,317	3,053,334	73.1%	62,566	1.5%	39,029	0.9%	127,866	3.1%	45,817	1.1%	126,929	3.0%	722,775	17.3%
2036	4,235,865	3,081,616	72.8%	64,422	1.5%	39,511	0.9%	131,152	3.1%	46,743	1.1%	131,430	3.1%	740,991	17.5%
2037	4,293,208	3,109,308	72.4%	66,310	1.5%	39,988	0.9%	134,469	3.1%	47,676	1.1%	136,047	3.2%	759,410	17.7%
2038	4,350,268	3,136,365	72.1%	68,230	1.6%	40,459	0.9%	137,814	3.2%	48,612	1.1%	140,781	3.2%	778,006	17.9%
2039	4,407,155	3,162,882	71.8%	70,185	1.6%	40,926	0.9%	141,190	3.2%	49,553	1.1%	145,637	3.3%	796,781	18.1%
2040	4,463,950	3,188,934	71.4%	72,176	1.6%	41,390	0.9%	144,598	3.2%	50,496	1.1%	150,620	3.4%	815,736	18.3%
2041	4,520,678	3,214,551	71.1%	74,204	1.6%	41,850	0.9%	148,038	3.3%	51,445	1.1%	155,732	3.4%	834,858	18.5%
2042	4,577,247	3,239,686	70.8%	76,267	1.7%	42,305	0.9%	151,505	3.3%	52,396	1.1%	160,972	3.5%	854,116	18.7%
2043	4,633,568	3,264,294	70.4%	78,365	1.7%	42,755	0.9%	154,995	3.3%	53,349	1.2%	166,338	3.6%	873,473	18.9%
2044	4,689,532	3,288,321	70.1%	80,493	1.7%	43,197	0.9%	158,503	3.4%	54,300	1.2%	171,829	3.7%	892,889	19.0%
2045	4,745,057	3,311,731	69.8%	82,652	1.7%	43,631	0.9%	162,023	3.4%	55,250	1.2%	177,441	3.7%	912,330	19.2%
2046	4,800,120	3,334,533	69.5%	84,840	1.8%	44,057	0.9%	165,552	3.4%	56,192	1.2%	183,174	3.8%	931,771	19.4%
2047	4,854,748	3,356,761	69.1%	87,057	1.8%	44,474	0.9%	169,089	3.5%	57,131	1.2%	189,030	3.9%	951,206	19.6%
2048	4,909,089	3,378,535	68.8%	89,306	1.8%	44,884	0.9%	172,637	3.5%	58,066	1.2%	195,013	4.0%	970,648	19.8%
2049	4,963,211	3,399,922	68.5%	91,586	1.8%	45,286	0.9%	176,196	3.6%	58,994	1.2%	201,126	4.1%	990,100	19.9%
2050	5,017,232	3,421,016	68.2%	93,900	1.9%	45,683	0.9%	179,769	3.6%	59,920	1.2%	207,372	4.1%	1,009,572	20.1%
2051	5,071,236	3,441,888	67.9%	96,249	1.9%	46,074	0.9%	183,354	3.6%	60,843	1.2%	213,753	4.2%	1,029,075	20.3%
2052	5,125,126	3,462,482	67.6%	98,630	1.9%	46,459	0.9%	186,948	3.6%	61,761	1.2%	220,262	4.3%	1,048,584	20.5%
2053	5,178,833	3,482,762	67.2%	101,043	2.0%	46,836	0.9%	190,545	3.7%	62,672	1.2%	226,895	4.4%	1,068,081	20.6%
2054	5,232,327	3,502,715	66.9%	103,485	2.0%	47,206	0.9%	194,141	3.7%	63,578	1.2%	233,646	4.5%	1,087,556	20.8%
2055	5,285,767	3,522,454	66.6%	105,961	2.0%	47,570	0.9%	197,742	3.7%	64,476	1.2%	240,523	4.6%	1,107,042	20.9%
2056	5,339,307	3,542,085	66.3%	108,472	2.0%	47,928	0.9%	201,351	3.8%	65,373	1.2%	247,527	4.6%	1,126,571	21.1%
2057	5,393,004	3,561,647	66.0%	111,020	2.1%	48,283	0.9%	204,970	3.8%	66,266	1.2%	254,662	4.7%	1,146,155	21.3%
2058	5,446,925	3,581,183	65.7%	113,608	2.1%	48,633	0.9%	208,601	3.8%	67,160	1.2%	261,930	4.8%	1,165,810	21.4%
2059	5,501,088	3,600,706	65.5%	116,234	2.1%	48,980	0.9%	212,243	3.9%	68,052	1.2%	269,331	4.9%	1,185,543	21.6%
2060	5,555,423	3,620,164	65.2%	118,900	2.1%	49,321	0.9%	215,894	3.9%	68,941	1.2%	276,862	5.0%	1,205,341	21.7%
2061	5,609,943	3,655,691	65.2%	120,067	2.1%	49,805	0.9%	218,012	3.9%	69,617	1.2%	279,579	5.0%	1,217,170	21.7%
2062	5,664,555	3,691,280	65.2%	121,236	2.1%	50,290	0.9%	220,135	3.9%	70,295	1.2%	282,301	5.0%	1,229,019	21.7%
2063	5,719,145	3,726,853	65.2%	122,404	2.1%	50,775	0.9%	222,256	3.9%	70,972	1.2%	285,021	5.0%	1,240,863	21.7%
2064	5,773,599	3,762,338	65.2%	123,569	2.1%	51,258	0.9%	224,372	3.9%	71,648	1.2%	287,735	5.0%	1,252,678	21.7%
2065	5,827,810	3,797,664	65.2%	124,730	2.1%	51,740	0.9%	226,479	3.9%	72,321	1.2%	290,437	5.0%	1,264,440	21.7%

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

Employment, Wages, and Labor Force

2

Mark Knold, Utah Department of Workforce Services

2021 OVERVIEW

The year began with the world immersed in a health pandemic. Across the globe, significant economic setbacks remained. The United States was one of the world's lesser-impacted economies as it had the means to backstop its economy with considerable economic stimulus. But even then, it was still an economy facing disruption.

At the state level, Utah and Idaho were economic standouts. Though both were impacted with job disruptions at the pandemic's onset, as each month thereafter progressed, their economies rebounded. By the end of 2020, both economies had improved and closed the job-loss gap (although several industry sectors were still down). No other states had such a positive economic springboard entering 2021.

As 2021 progressed, the Utah economy as measured by jobs was now growing over-and-above the state's pre-pandemic economic position. Therefore, it made sense to appraise 2021's economic position not against the pandemic's disruption, but against real trend growth last seen in 2019. In response, a two-year economic evaluation has been temporarily adopted.

Utah ended 2021 with two-year job growth around 3.5%, spanning from late 2019 to late 2021, with a global health pandemic in-between. That growth is a significant economic achievement and needs to be appreciated for the unique accomplishment that it is.

How can Utah achieve such a performance? Multiple reasons emerge. The state entered the pandemic in the best economic position possible. The economy was fully-employed. Job growth was strong, and unemployment was historically low. No major economic weaknesses carried into the pandemic.

Utah's high birthrate is a major economic driver. As generations age into the labor force, Utah's economy is stimulated to absorb this growth. This can temper or mitigate negative waves that come at the Utah economy from without, such as a global pandemic.

During the pandemic, Utah did not restrict its economy as aggressively as most other states. Utah's youngest-in-the-nation population could weather the health risk better than most.

Proximity to California is always a factor. That large state imposed tighter pandemic restrictions. Southern Utah benefitted. People from other states found there a viable and accessible recreation outlet.

Another impact was the prompt acceptance of teleworking. Nationwide, businesses whose employees' main work tool is a computer found that their workforce could keep business running outside of an office environment. This discovery created a new American migratory class that is educated and affluent. Utah became a recipient of such labor. That labor's entrance helped to support consumer demand for Utah goods and services.

An emerging tight labor market was another economic story of 2021. Society was eager for the pandemic to disappear. In the spring of 2021, that hope seemed to have arrived as vaccinations were rising and pandemic case counts fading. Beginning in April, the country started to commercially behave as if the pandemic was over. The country's business trepidation faded and the demand for goods and services rapidly returned to its pre-pandemic level.

But in the pandemic interval, about 35,000 laborers had moved to the sidelines by dropping out of the labor force. They did not return to the job market in equal response to the business demand. A wide gap emerged between labor supply and demand. Many businesses spoke of not being able to find enough workers. The

problem was particularly acute in the lower-wage, lower-skill leisure and hospitality realm that had just fully reopened.

This labor shortfall is so pronounced that by year's end, Utah's unemployment rate had fallen to an all-time low of 2.2%, and looking like it would trend lower.

The difficulty of finding labor is real. The business community will support that assessment. What needs to be kept in mind is that the Utah economy is growing, and an economy cannot grow without labor. Therefore, even in the midst of this tight labor market, the Utah economy is managing to find enough labor to grow and expand.

2022 OUTLOOK

As Utah's job growth reveals, to date, finding labor has not been a severely restrictive obstacle. But there can come a point where it might. Utah has had recent periods where the tightness of its labor market looked like it was about to slow further economic expansion. But a national recession would arise and dissolve that concern.

The current national economy does not appear to be heading in that direction. It is still working toward pulling out of its pandemic setback. Therefore, labor restrictions may be a major economic risk facing the Utah economy in 2022.

Labor restrictions could merge with another potential risk, which is a short housing supply and high housing prices. Labor in-migration would help ease any Utah labor shortfall, but if housing prices and availability become barriers, they would work against that labor source.

There are pockets in Utah where labor could still be available. The labor force participation rate is lower than its pre-pandemic level of 68.5%, meaning there are roughly 11,000 fewer labor force participants now than pre-pandemic. A fading pandemic in 2022 has the potential to lure these sidelined workers back.

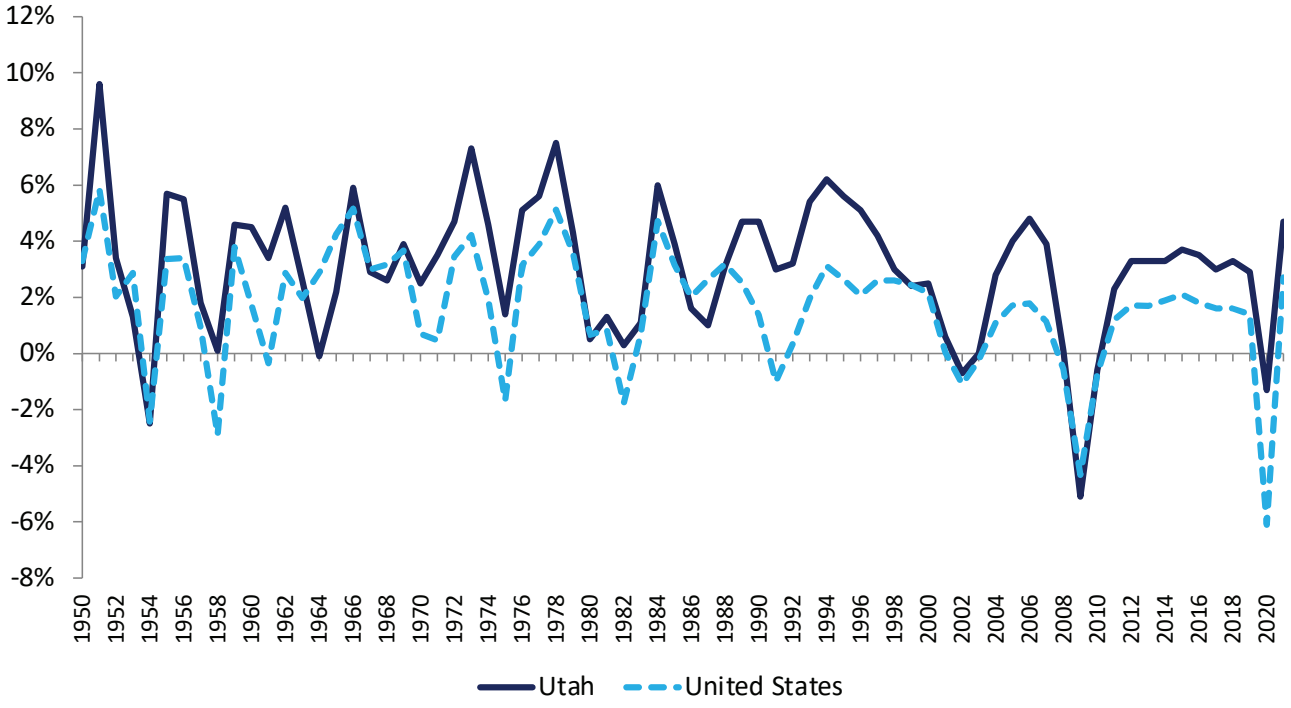
Also, multiple job holding is lower now than before the pandemic, to the tune of roughly 5,000 positions. Again, a fading pandemic may remove a barrier and return multiple job holding to customary levels.

The main risk to the 2022 Utah economy appears to be labor availability. But it is not the only one. A re-emerging pandemic instead of a fading one would change the forecast dynamic.

Given the economic environment entering 2022, and taking into account the risks and restrictions surrounding the economy, it is forecast that Utah's employment level will still be able to grow between a 2.5% and 3.0% pace. The state has an uncanny track record of finding, attracting, and meeting its economic labor needs.

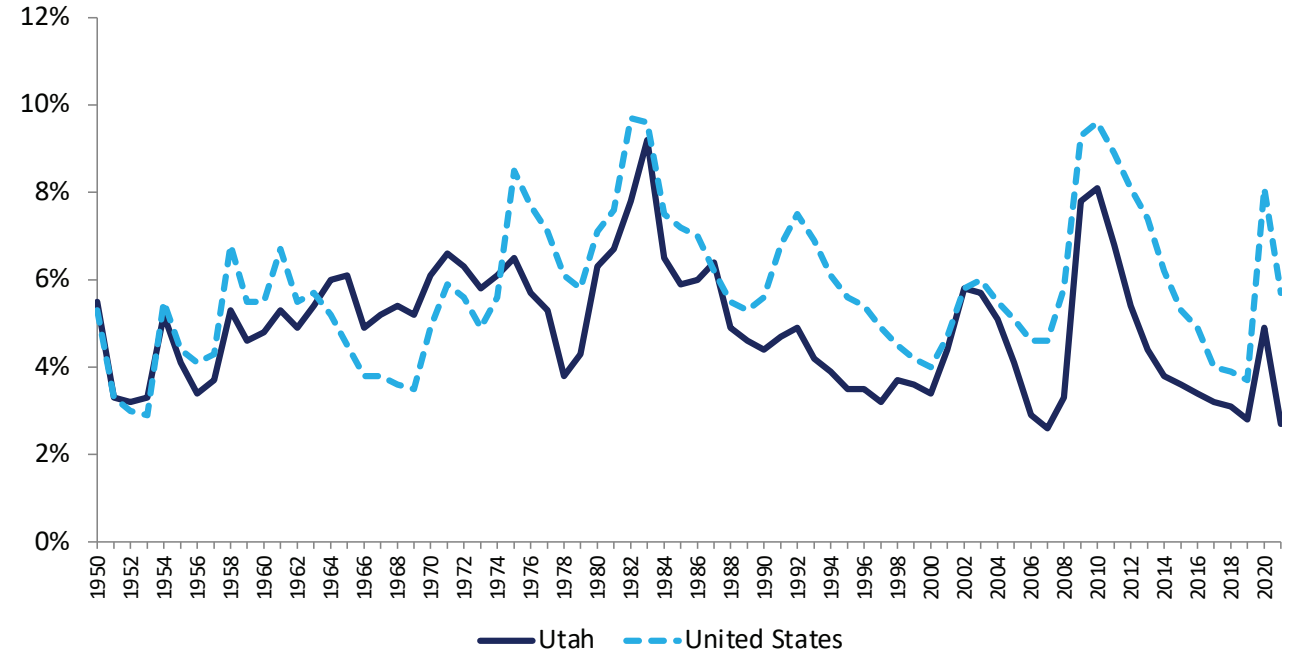
Unemployment is expected to remain historically low, around the 2.0% level. Because of that, pressure will be upward on the price of labor. Therefore, average wage growth is expected to be above average—somewhere at or north of 3.4%.

Figure 2.1: Annual Average Job Growth Rate for Utah and the United States



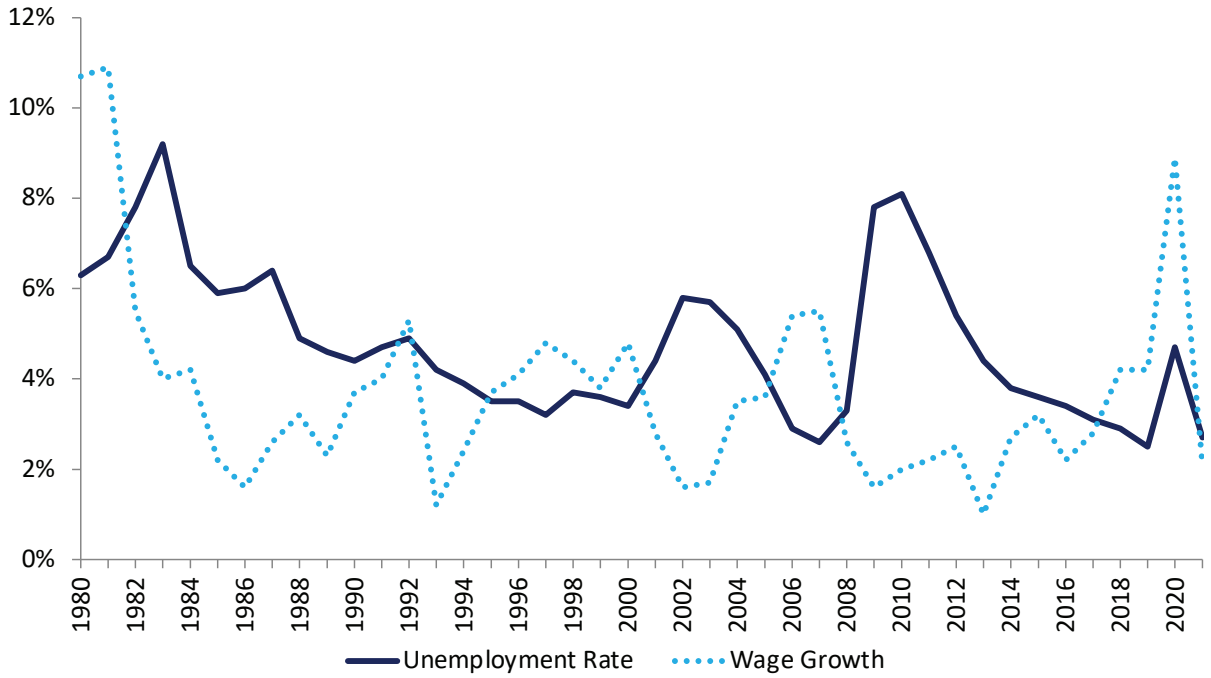
Source: U.S. Bureau of Labor Statistics

Figure 2.2: Annual Unemployment Rate for Utah and the United States



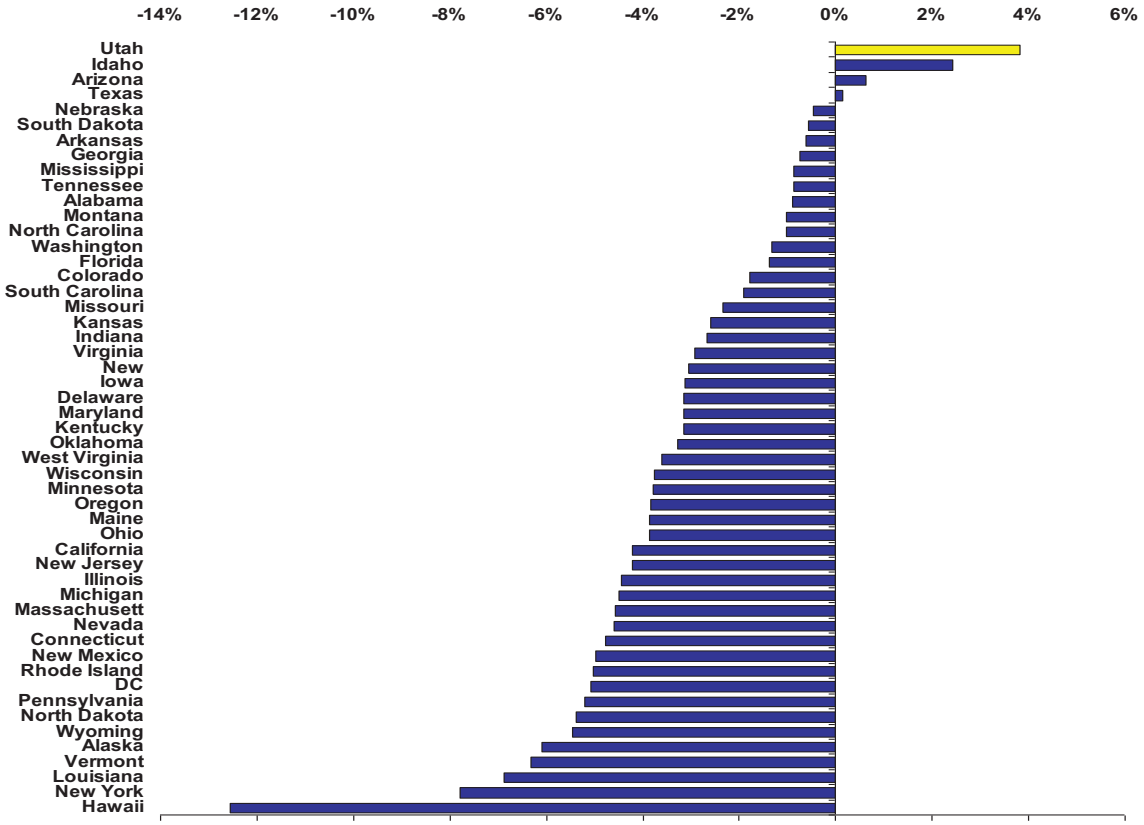
Source: U.S. Bureau of Labor Statistics

Figure 2.3: Annual Average Unemployment Rate and Wage Growth



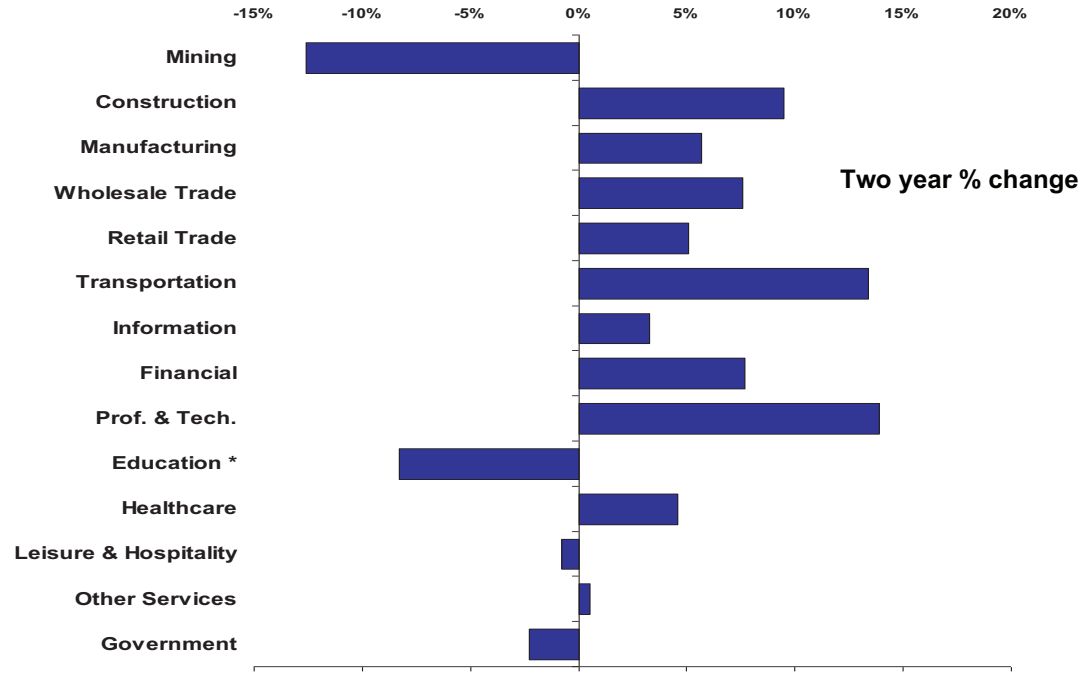
Source: U.S. Bureau of Labor Statistics

Figure 2.4: State by State Employment Change, October 2019–2021



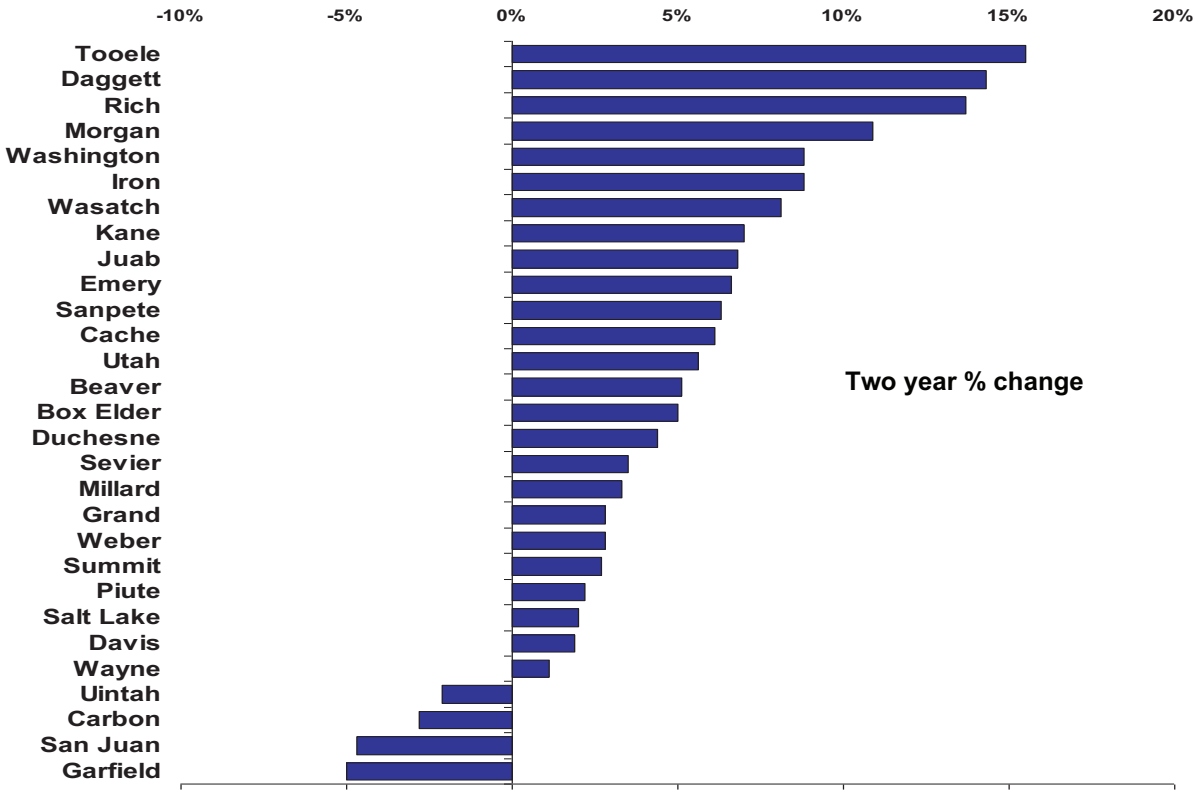
Source: U.S. Bureau of Labor Statistics

Figure 2.5: Utah Industry Employment Percent Change, October 2019–2021



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

Figure 2.6: County Employment Change, October 2019–October 2021



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

Table 2.1: Utah Nonfarm Employment and Unemployment Rate, and Labor Force Participation Rate

Year	Payroll Emp.	Percent Change	Absolute Change	Unemp. Rate	Utah Labor Force Participation Rate	U.S. Labor Force Participation Rate
1950	189,153	3.1	5,653	5.5		
1951	207,386	9.6	18,233	3.3		
1952	214,409	3.4	7,023	3.2		
1953	217,194	1.3	2,785	3.3		
1954	211,864	-2.5	-5,330	5.2		
1955	224,007	5.7	12,143	4.1		
1956	236,225	5.5	12,218	3.4		
1957	240,577	1.8	4,352	3.7		
1958	240,816	0.1	239	5.3		
1959	251,940	4.6	11,124	4.6		
1960	263,307	4.5	11,367	4.8		
1961	272,355	3.4	9,048	5.3		
1962	286,382	5.2	14,027	4.9		
1963	293,758	2.6	7,376	5.4		
1964	293,576	-0.1	-182	6.0		
1965	300,164	2.2	6,588	6.1		
1966	317,771	5.9	17,607	4.9		
1967	326,953	2.9	9,182	5.2		
1968	335,527	2.6	8,574	5.4		
1969	348,612	3.9	13,085	5.2		
1970	357,435	2.5	8,823	6.1		
1971	369,836	3.5	12,401	6.6		
1972	387,271	4.7	17,435	6.3		
1973	415,641	7.3	28,370	5.8		
1974	434,793	4.6	19,152	6.1		
1975	441,082	1.4	6,289	6.5		
1976	463,658	5.1	22,576	5.7	63.0	61.6
1977	489,580	5.6	25,922	5.3	63.0	62.3
1978	526,400	7.5	36,820	3.8	63.2	63.2
1979	549,242	4.3	22,842	4.3	65.1	63.7
1980	551,889	0.5	2,647	6.3	65.5	63.8
1981	559,184	1.3	7,295	6.7	65.4	63.9
1982	560,981	0.3	1,797	7.8	66.2	64.0
1983	566,991	1.1	6,010	9.2	65.8	64.0
1984	601,068	6.0	34,077	6.5	67.1	64.4
1985	624,387	3.9	23,319	5.9	68.8	64.8
1986	634,138	1.6	9,751	6.0	69.7	65.3
1987	640,298	1.0	6,160	6.4	69.5	65.6
1988	660,075	3.1	19,777	4.9	69.4	65.9
1989	691,244	4.7	31,169	4.6	71.1	66.5
1990	723,629	4.7	32,385	4.4	70.9	66.5
1991	745,202	3.0	21,573	4.7	70.9	66.2
1992	768,602	3.2	23,488	4.9	71.1	66.5
1993	809,731	5.4	41,129	4.2	72.2	66.3
1994	859,626	6.2	49,895	3.9	73.0	66.6
1995	907,886	5.6	48,260	3.5	72.0	66.6
1996	954,183	5.1	46,297	3.5	71.5	66.8
1997	993,999	4.2	39,816	3.2	71.8	67.1
1998	1,023,480	3.0	29,461	3.7	72.2	67.1
1999	1,048,498	2.4	25,018	3.6	72.1	67.1
2000	1,074,879	2.5	26,381	3.4	72.1	67.1
2001	1,081,685	0.6	6,806	4.4	71.9	66.8
2002	1,073,746	-0.7	-7,939	5.8	71.6	66.6
2003	1,074,131	0.0	385	5.7	71.1	66.2
2004	1,104,328	2.8	30,197	5.1	71.1	66.0
2005	1,148,320	4.0	43,992	4.1	71.6	66.0
2006	1,203,914	4.8	55,594	2.9	71.8	66.2
2007	1,251,282	3.9	47,368	2.6	71.9	66.1
2008	1,252,470	0.1	1,188	3.3	70.9	66.0
2009	1,188,736	-5.1	-63,734	7.8	69.2	65.4
2010	1,181,519	-0.6	-7,217	8.1	68.8	64.7
2011	1,208,650	2.3	27,131	6.8	67.8	64.1
2012	1,248,935	3.3	40,285	5.4	67.8	63.7
2013	1,290,523	3.3	41,588	4.4	68.2	63.3
2014	1,328,143	2.9	37,620	3.8	68.0	62.9
2015	1,377,744	3.7	49,601	3.6	68.2	62.7
2016	1,426,450	3.5	48,706	3.4	68.7	62.8
2017	1,469,134	3.0	42,707	3.3	68.9	62.9
2018	1,517,423	3.3	48,468	3.1	68.3	62.9
2019	1,559,746	2.8	42,257	2.6	68.5	63.1
2020	1,538,836	-1.3	-21,023	4.7	68.0	61.8
2021e	1,611,375	4.7	72,539	2.7	67.6	61.7
2022f	1,655,580	2.7	44,205	2.1	68.2	

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

Table 2.2: Utah Labor Force, Nonfarm Jobs, and Wages

Indicator	2018	2019	2020	2021e	2022f	Annual Percent Change 2019	2020	2021e	2022f
Civilian Labor Force	1,572,136	1,607,687	1,632,215	1,667,282	1,697,293	2.3%	1.5%	2.1%	1.8%
Employed Persons	1,523,158	1,565,782	1,555,782	1,621,788	1,662,383	2.8%	-0.6%	4.2%	2.5%
Unemployed Persons	48,978	41,906	76,433	45,494	34,910	-14.4%	82.4%	-40.5%	-23.3%
Unemployment Rate	3.1%	2.6%	4.7%	2.7%	2.1%				
Total Nonfarm Jobs	1,517,423	1,559,746	1,538,836	1,611,375	1,655,580	2.8%	-1.3%	4.7%	2.7%
Mining	9,470	9,359	8,658	8,600	8,900	-1.2%	-7.5%	-0.7%	3.5%
Construction	104,339	109,491	115,432	123,100	127,290	4.9%	5.4%	6.6%	3.4%
Manufacturing	132,978	136,921	136,420	144,800	147,300	3.0%	-0.4%	6.1%	1.7%
Trade, Trans., Utilities	286,343	290,944	290,381	304,800	309,445	1.6%	-0.2%	5.0%	1.5%
Information	38,052	39,579	38,474	40,100	41,760	4.0%	-2.8%	4.2%	4.1%
Financial Activity	87,540	90,020	93,313	96,000	98,880	2.8%	3.7%	2.9%	3.0%
Professional & Business Services	217,555	223,900	225,252	231,745	239,949	2.9%	0.6%	2.9%	3.5%
Education & Health Services	203,495	210,018	208,847	215,630	222,530	3.2%	-0.6%	3.2%	3.2%
Leisure & Hospitality	148,503	153,458	133,416	148,700	153,607	3.3%	-13.1%	11.5%	3.3%
Other Services	41,253	42,266	40,037	42,300	43,759	2.5%	-5.3%	5.7%	3.4%
Government	247,895	253,790	248,608	255,600	262,160	2.4%	-2.0%	2.8%	2.6%
Goods-producing	246,787	255,771	260,510	276,500	283,490	3.6%	1.9%	6.1%	2.5%
Service-producing	1,270,636	1,303,975	1,278,326	1,334,875	1,372,090	2.6%	-2.0%	4.4%	2.8%
Percent Service-producing	83.7%	83.6%	83.1%	82.8%	82.9%				
Total Nonfarm Wages (thousands)	$72,270	$77,400	$83,043	$88,900	$94,460	7.1%	7.3%	7.1%	6.3%
Average Annual Wage	$47,627	$49,623	$53,964	$55,170	$57,058	4.2%	8.7%	2.2%	3.4%
Average Monthly Wage	$3,969	$4,135	$4,497	$4,598	$4,755				
Establishments (first quarter)	102,758	107,182	111,933	114,960	119,300				

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 2.3: Utah's Largest Employers, Annual Average Employment, 2020

Rank	Company Name	Industry
1	University of Utah (Including Hospital)	Higher Education
2	Intermountain Healthcare	Health Care
3	State of Utah	State Government
4	Wal-Mart Associates	Warehouse Clubs/Supercenters
5	Brigham Young University	Higher Education
6	Hill Air Force Base (civilian employment)	Federal Government
7	Alpine School District	Public Education
8	Davis County School District	Public Education
9	Utah State University	Higher Education
10	Granite School District	Public Education
11	Smith's Food and Drug Centers	Grocery Stores
12	Jordan School District	Public Education
13	Salt Lake County	Local Government
14	Utah Valley University	Higher Education
15	U.S. Postal Service	Federal Government
16	U.S. Department of Treasury	Federal Government
17	Amazon.com Services	Courier/Express Delivery Service
18	The Home Depot	Home Centers
19	Weber County School District	Public Education
20	The Canyons School District	Public Education
21	ARUP Laboratories, Inc.	Medical Laboratory
22	Delta Airlines	Air Transportation
23	United Parcel Service	Courier/Express Delivery Service
24	Zions Bancorporation	Banking
25	Nebo School District	Public Education
26	Washington County School District	Public Education
27	Salt Lake City School District	Public Education
28	Salt Lake City Corporation	Local Government
29	VA Hospital	Health Care
30	Discover Products, Inc.	Consumer Loans
31	Vivint	Electrical Contractors
32	Autoliv	Motor Vehicle Equipment Manufacturing
33	Costco	Warehouse Clubs/Supercenters
34	America First Credit Union	Banking
35	Harmons	Grocery Stores
36	Wells Fargo Bank	Banking
37	Cache County School District	Public Education
38	Utah Transit Authority	Public Transportation
39	Salt Lake Community College	Higher Education
40	Weber State University	Higher Education
41	BioFire Diagnostics	Medical Technology Research
42	DoTERRA International	Direct Selling
43	R1 RMC	Financial Services
44	Young Living Essential Oils	Direct Selling
45	Chrysalis Utah	Elderly and Disabled Services
46	L3 Technologies	Electronics Manufacturing
47	Target Corporation	Supercenters
48	Lowe's Home Center	Home Centers
49	Kennecott Utah Copper	Mining
50	Merit Medical Systems	Medical Manufacturing

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

Personal Income

3

Robert Spendlove, Zions Bank
Bart Todd, Zions Bank

2021 OVERVIEW

Utah's total personal income in 2021 was an estimated $179.2 billion, a 5.7% increase from $169.7 billion in 2020. Utah's estimated 2021 per capita income was $53,859, up 3.2% from $52,204 in 2020. While federal fiscal and monetary support continued in 2021, it was much lower than in 2020, which resulted in slowing personal income growth. U.S total personal income grew by 6.5% in 2021, and per capita personal income grew by 5.7%. Utah's 2021 estimated total personal income growth and per capita personal income growth slowed and were below the national average.

Total Personal Income

Total personal income (TPI) is the sum of all individual personal income in a given region. There are three components of TPI: (1) net earnings by place of work, adjusted for place of residence; (2) property income, or income from dividends, interest, and rent; and (3) income from transfer receipts, which are benefits received from the government, including Social Security, Medicare and Medicaid, and veteran's benefits. In 2020, Utah's TPI was $169.7 billion, and of that, net earnings by place of residence comprised the largest share (64.5%). This was followed by property income from dividends, interest, and rent (20.2%), and income from transfer receipts (15.3%).

While Utah's component share of net earnings and property income from dividends, interest, and rent was similar to the national average, its income from transfer receipts was the lowest of any state. The three states with the lowest share of transfer receipt income were Utah (15.3%), Colorado (16.6%), and Connecticut (17.2%). The states with the highest share were West Virginia (33.3%), Mississippi (31.1%), and New Mexico (29.5%).

In 2020, Utah's TPI rose 7.8% from $157.3 billion to $169.7 billion. The fastest-growing component was transfer receipt income, which grew 30.6% from $19.9 billion to $26.0 billion. Net earnings by place of residence rose 5.7% from $103.5 billion to $109.5 billion, and property income from dividends, interest, and rent rose 0.9% from $33.9 billion to $34.2 billion.

The majority of earnings by place of work, which includes government social insurance, came from wages and salaries (72.4%), followed by supplements to wages and salaries (16.1%), and proprietors' income (11.4%). Utah's earnings by place of work came primarily from nonfarm earnings (99.6%) versus farm earnings (0.4%). This is roughly equivalent to the nonfarm/farm split for the United States (99.5% and 0.5%, respectively).

Of Utah's nonfarm earnings, 84.6% came from the private sector and 15.4% came from the public sector. Within the Utah private sector, the professional, scientific, and technical services sector (12.2%) was the largest source of earnings; followed by manufacturing (10.9%) and construction (10.5%). At the national level, health care and social assistance accounted for the largest percentage of private-sector earnings (13.5%); followed by professional, scientific, and technical services (13.1%) and manufacturing (10.7%).

In 2020, all but three of Utah's broad private-industry classifications experienced positive growth in earnings. The finance and insurance sector had the highest year-over-year earnings growth of 17.0%; followed by forestry, fishing, and related activities (12.1%) and construction (11.2%). The arts, entertainment, and recreation sector had the lowest year-over-year earnings growth of (-21.3%); followed by accommodation and food services (-13.7%) and mining, quarrying, and oil and gas extraction (-3.2%).

Earnings in Utah's public sector, which includes federal civilians, military, and state and local employees, expanded by 4.9% in 2020.

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 2021 per capita personal income was $53,859, up 3.2% from the 2020 level of $52,204. Utah's estimated 2021 per capita income was 85.6% of the national per capita income of $62,926.

In 2020, Utah's total personal income growth rate was the eleventh-highest in the nation, while its per capita personal income growth rate was the twenty-third highest. Utah's young population has largely driven this dynamic of higher personal income growth but lower per capita income growth. While total personal income is expanding, per capita personal income is weighed down by many young individuals counted in the population but have not yet entered the workforce. As Utah's population continues to diversify, 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 6.3% in 2020, which was higher than its 5.9% growth in 2019. All 29 counties experienced per capita personal income gains in 2020. Garfield County experienced the strongest year-over-year growth (12.4%), while Wayne (11.6%), Millard (11.6%), Juab (9.9%), and Sanpete (9.9%) rounded out the top five counties for growth.

In 2020, Summit County's per capita personal income was the highest in Utah at $156,537, almost three times the state average of $52,204. Summit, along with Wasatch ($61,653) and Grand ($60,928), were the only three counties with an average per capita personal income that exceeded the national average of $59,510. Salt Lake ($59,077) and Morgan ($58,631) were the only other counties to outpace the statewide per capita income average.

2022 OUTLOOK

Utah's total personal income in 2021 was estimated to have grown 5.7%, slowing from 7.8% growth in 2020. The state's estimated 2021 per capita personal income growth of 3.2% was also lower than the 2020 growth of 6.3%. Utah's 2021 per capita personal income growth was higher than the national growth of 5.7%.

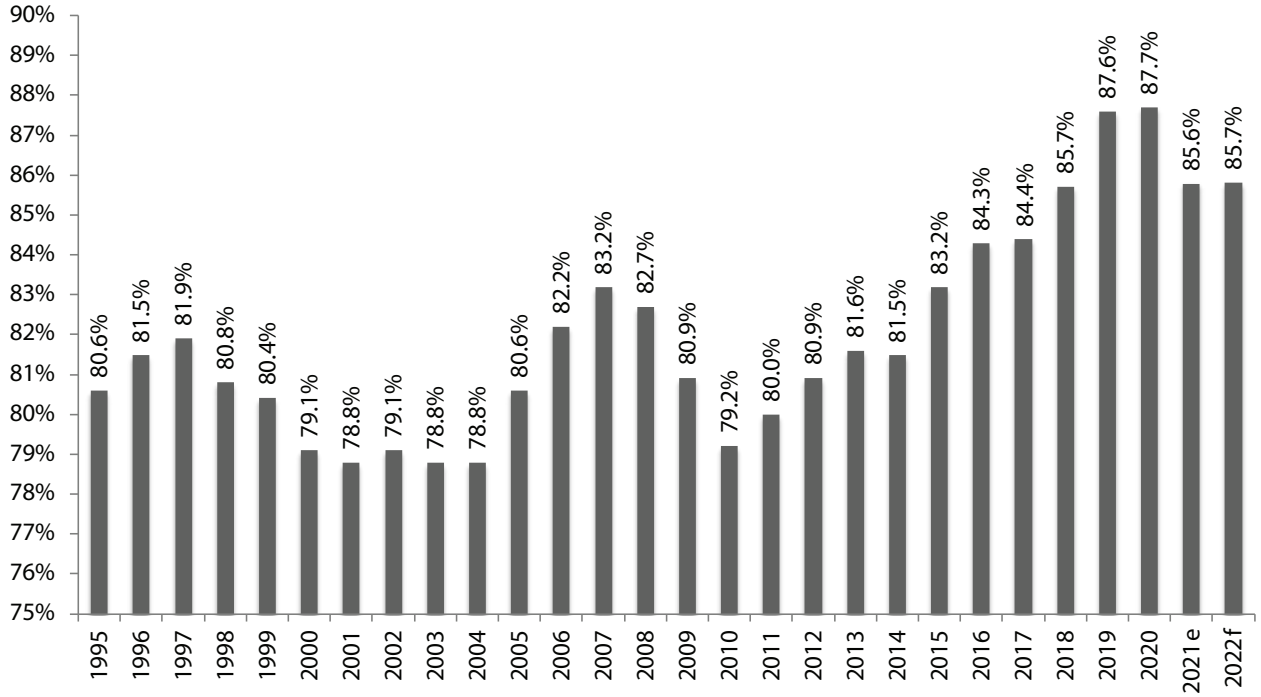
While continued federal fiscal and monetary support continued in 2021, it was much lower than the historically high levels of 2020. This resulted in personal income growth slowing markedly in Utah and the United States.

In 2022, both Utah and the United States are expected to see continued slowing in personal income growth. Federal pandemic financial support is likely finished and monetary policy will likely tighten in 2022, which will constrain growth. U.S. personal income is expected to slow from 7.2% in 2021 to 1.3% in 2022.

Utah personal income is similarly expected to slow in the next year, from 5.7% in 2021 to 1.8% in 2022. Utah continues to benefit from a strong economy, but labor constraints and inflationary pressure will impact the state's personal income outlook.

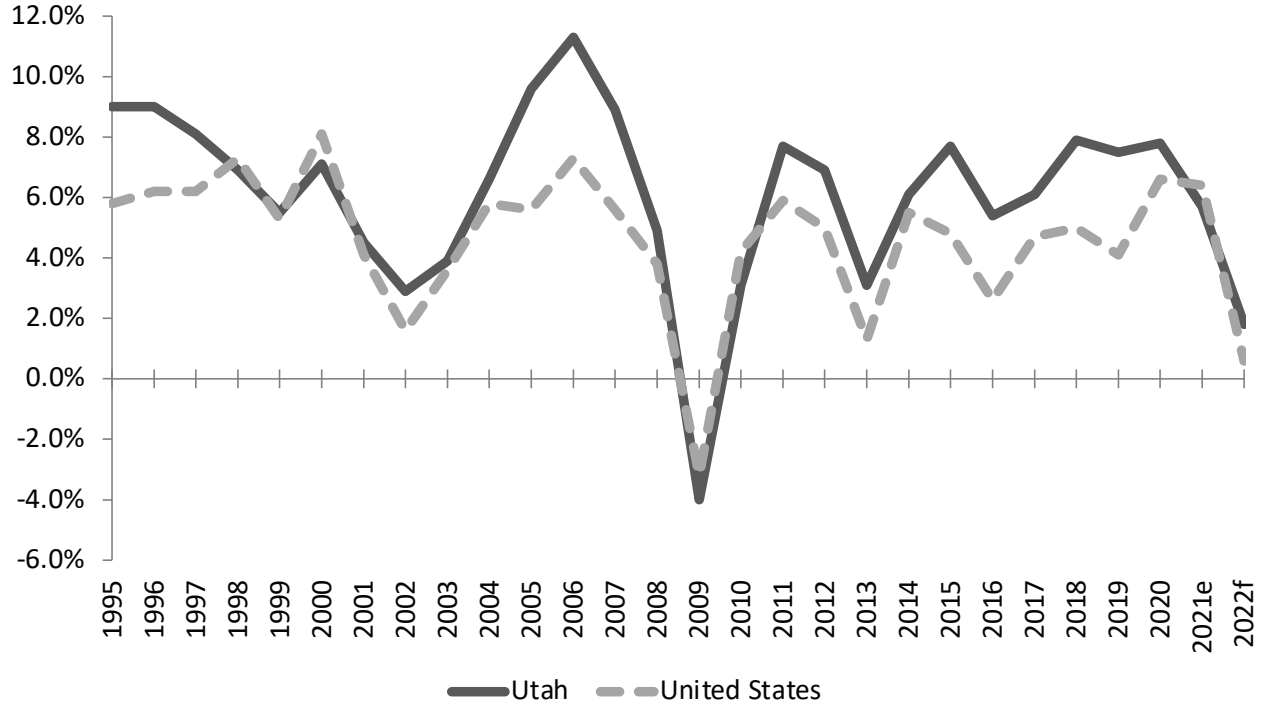
Personal income growth is likely to continue to vary significantly among Utah industries. Those that experienced negative impacts in 2021, such as those related to leisure and hospitality, are likely to remain constrained in 2022 as the limited pool of available labor will constrain growth. Other industries, such as finance and insurance, will likely experience more substantial growth in 2022.

Figure 3.1: 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 3.2: 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 3.1: 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	$855,525	0.44%	11.3%	8.1%	$3,558	$4,218	84.4%
1971	4,243	924,613	0.46%	11.9%	8.1%	3,855	4,471	86.2%
1972	4,741	1,016,408	0.47%	11.7%	9.9%	4,179	4,857	86.0%
1973	5,283	1,133,468	0.47%	11.4%	11.5%	4,520	5,363	84.3%
1974	5,910	1,244,912	0.47%	11.9%	9.8%	4,930	5,836	84.5%
1975	6,591	1,362,505	0.48%	11.5%	9.4%	5,341	6,324	84.5%
1976	7,464	1,495,704	0.50%	13.2%	9.8%	5,866	6,875	85.3%
1977	8,441	1,651,632	0.51%	13.1%	10.4%	6,412	7,516	85.3%
1978	9,712	1,855,849	0.52%	15.1%	12.4%	7,119	8,356	85.2%
1979	10,972	2,073,257	0.53%	13.0%	11.7%	7,748	9,232	83.9%
1980	12,319	2,313,160	0.53%	12.3%	11.6%	8,366	10,180	82.2%
1981	13,893	2,592,915	0.54%	12.8%	12.1%	9,167	11,300	81.1%
1982	15,067	2,779,794	0.54%	8.5%	7.2%	9,669	11,999	80.6%
1983	16,135	2,968,676	0.54%	7.1%	6.8%	10,116	12,698	79.7%
1984	17,820	3,279,488	0.54%	10.4%	10.5%	10,984	13,906	79.0%
1985	19,070	3,510,471	0.54%	7.0%	7.0%	11,607	14,755	78.7%
1986	20,042	3,719,647	0.54%	5.1%	6.0%	12,053	15,490	77.8%
1987	20,995	3,946,593	0.53%	4.8%	6.1%	12,511	16,289	76.8%
1988	22,330	4,267,813	0.52%	6.4%	8.1%	13,218	17,455	75.7%
1989	23,967	4,609,667	0.52%	7.3%	8.0%	14,050	18,676	75.2%
1990	25,985	4,897,821	0.53%	8.4%	6.3%	15,010	19,621	76.5%
1991	27,864	5,067,291	0.55%	7.2%	3.5%	15,656	20,030	78.2%
1992	30,126	5,409,920	0.56%	8.1%	6.8%	16,401	21,090	77.8%
1993	32,491	5,648,732	0.58%	7.9%	4.4%	17,115	21,733	78.8%
1994	35,157	5,940,128	0.59%	8.2%	5.2%	17,933	22,575	79.4%
1995	38,308	6,286,143	0.61%	9.0%	5.8%	19,019	23,607	80.6%
1996	41,739	6,673,186	0.63%	9.0%	6.2%	20,183	24,771	81.5%
1997	45,125	7,086,935	0.64%	8.1%	6.2%	21,288	25,993	81.9%
1998	48,228	7,601,594	0.63%	6.9%	7.3%	22,266	27,557	80.8%
1999	50,859	8,006,585	0.64%	5.5%	5.3%	23,081	28,693	80.4%
2000	54,451	8,654,561	0.63%	7.1%	8.1%	24,260	30,672	79.1%
2001	56,923	9,009,842	0.63%	4.5%	4.1%	24,925	31,617	78.8%
2002	58,563	9,157,682	0.64%	2.9%	1.6%	25,190	31,839	79.1%
2003	60,873	9,491,393	0.64%	3.9%	3.6%	25,792	32,717	78.8%
2004	64,887	10,037,313	0.65%	6.6%	5.8%	27,018	34,280	78.8%
2005	71,095	10,599,603	0.67%	9.6%	5.6%	28,927	35,868	80.6%
2006	79,116	11,374,142	0.70%	11.3%	7.3%	31,327	38,120	82.2%
2007	86,153	12,014,107	0.72%	8.9%	5.6%	33,165	39,883	83.2%
2008	90,387	12,475,898	0.72%	4.9%	3.8%	33,941	41,026	82.7%
2009	86,762	12,073,407	0.72%	-4.0%	-3.2%	31,858	39,356	80.9%
2010	89,439	12,586,509	0.71%	3.1%	4.2%	32,226	40,690	79.2%
2011	96,357	13,330,436	0.72%	7.7%	5.9%	34,232	42,783	80.0%
2012	102,991	14,003,346	0.74%	6.9%	5.0%	36,085	44,614	80.9%
2013	106,176	14,189,228	0.75%	3.1%	1.3%	36,628	44,894	81.6%
2014	112,620	14,969,527	0.75%	6.1%	5.5%	38,328	47,017	81.5%

2015	121,339	15,681,233	0.77%	7.7%	4.8%	40,668	48,891	83.2%
2016	127,881	16,092,713	0.79%	5.4%	2.6%	42,008	49,812	84.3%
2017	135,659	16,845,028	0.81%	6.1%	4.7%	43,711	51,811	84.4%
2018	146,326	17,681,159	0.83%	7.9%	5.0%	46,377	54,098	85.7%
2019	157,335	18,402,004	0.85%	7.5%	4.1%	49,115	56,047	87.6%
2020	169,656	19,627,600	0.87%	7.8%	6.5%	52,204	59,510	87.7%
2021e	179,242	21,040,500	0.86%	5.7%	7.2%	53,859	62,926	85.6%
2022f	182,511	21,324,400	0.87%	1.8%	1.3%	54,045	63,059	85.7%

Note: All dollar amounts are in current dollars (not adjusted for inflation).
e = estimate
f = forecast
Source: U.S. Bureau of Economic Analysis. Last updated: September 23, 2021—revised statistics for 1998–2020. 2021e and 2022f data from Utah Revenue Assumptions Working Group, October 2021 Short-Run Economic Forecast.

Table 3.2: Per Capita Personal Income by County

County	2015	2016	2017	2018	2019	2020	2015-16	2016-17	2017-18	2018-19	2019-20
State of Utah	$40,668	$42,008	$43,711	$46,377	$49,115	$52,204	3.3%	4.1%	6.1%	5.9%	6.3%
Summit	112,861	117,417	124,876	144,148	152,310	156,537	4.0%	6.4%	15.4%	5.7%	2.8%
Wasatch	43,214	48,275	50,915	56,575	59,263	61,653	11.7%	5.5%	11.1%	4.8%	4.0%
Grand	43,506	46,919	51,226	55,584	58,620	60,928	7.8%	9.2%	8.5%	5.5%	3.9%
Salt Lake	46,104	47,524	49,323	52,130	55,481	59,077	3.1%	3.8%	5.7%	6.4%	6.5%
Morgan	45,539	47,581	49,381	53,152	56,156	58,631	4.5%	3.8%	7.6%	5.7%	4.4%
Davis	40,895	42,655	43,885	46,123	48,778	51,852	4.3%	2.9%	5.1%	5.8%	6.3%
Daggett	40,324	39,845	41,995	42,613	47,457	48,761	-1.2%	5.4%	1.5%	11.4%	2.7%
Piute	36,412	36,837	42,984	43,381	45,577	48,595	1.2%	16.7%	0.9%	5.1%	6.6%
Weber	36,641	37,680	39,320	41,132	43,477	46,675	2.8%	4.4%	4.6%	5.7%	7.4%
Utah	35,553	37,185	38,634	40,961	43,611	46,465	4.6%	3.9%	6.0%	6.5%	6.5%
Wayne	33,306	34,026	36,938	39,667	41,350	46,145	2.2%	8.6%	7.4%	4.2%	11.6%
Kane	37,575	37,771	38,916	40,315	41,604	45,074	0.5%	3.0%	3.6%	3.2%	8.3%
Cache	34,544	35,408	37,269	39,707	42,075	44,947	2.5%	5.3%	6.5%	6.0%	6.8%
Garfield	35,064	35,147	36,978	37,368	39,502	44,411	0.2%	5.2%	1.1%	5.7%	12.4%
Box Elder	33,558	34,027	35,499	37,853	40,330	44,131	1.4%	4.3%	6.6%	6.5%	9.4%
Washington	33,195	35,020	37,213	39,964	41,869	43,782	5.5%	6.3%	7.4%	4.8%	4.6%
Rich	39,127	34,919	35,165	36,973	39,387	42,762	-10.8%	0.7%	5.1%	6.5%	8.6%
Juab	32,471	32,548	33,460	37,396	38,699	42,531	0.2%	2.8%	11.8%	3.5%	9.9%
Carbon	35,083	34,357	35,672	38,356	40,207	42,459	-2.1%	3.8%	7.5%	4.8%	5.6%
Millard	34,144	32,996	33,508	35,320	37,507	41,843	-3.4%	1.6%	5.4%	6.2%	11.6%
Beaver	29,542	27,529	32,350	35,149	39,246	41,667	-6.8%	17.5%	8.7%	11.7%	6.2%
Tooele	32,821	33,932	34,825	36,832	37,978	41,301	3.4%	2.6%	5.8%	3.1%	8.7%
Duchesne	36,179	33,449	36,016	36,025	38,574	40,780	-7.5%	7.7%	0.0%	7.1%	5.7%
Sevier	30,268	30,678	32,139	34,836	36,419	39,383	1.4%	4.8%	8.4%	4.5%	8.1%
Emery	29,580	29,877	30,907	33,387	34,753	38,057	1.0%	3.4%	8.0%	4.1%	9.5%
Iron	28,617	28,890	30,228	32,163	34,048	36,412	1.0%	4.6%	6.4%	5.9%	6.9%
Uintah	30,800	28,556	30,117	31,244	31,965	32,945	-7.3%	5.5%	3.7%	2.3%	3.1%
Sanpete	28,255	26,913	27,313	29,053	29,974	32,927	-4.7%	1.5%	6.4%	3.2%	9.9%
San Juan	23,655	23,932	25,411	26,283	28,142	30,198	1.2%	6.2%	3.4%	7.1%	7.3%

Note: All dollar amounts are in current dollars (not adjusted for inflation).
Source: U.S. Bureau of Economic Analysis. Last updated: September 23, 2021—revised statistics for 1998-2020.

Gross Domestic Product

4

Andrea Wilko, Utah Legislative Fiscal Analyst Office

2021 OVERVIEW

Gross domestic product (GDP) estimates the value of final goods and services produced in an economy. It is a common indicator used to track the economic health of the nation or a state. Conceptually, GDP includes gross output less intermediate inputs, and as such it measures the economic activity within a geographic area. 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 $197.6 billion in 2020, up from $195.1 billion in 2019. This represents a growth rate of 1.3%, which ranked the highest in the nation. The 1.3% Utah GDP growth rate represents a deceleration in growth over the previous three years largely attributed to the impacts of the COVID-19 pandemic. National GDP declined about 2.2% in 2020, a deceleration from the 4.1% growth in 2019.

Real GDP

Utah's real GDP (measured in 2012 chained dollars) was $171.4 billion in 2020, up from $171.1 billion in 2019. This represents a growth rate of 0.1%. From 2019 to 2020, the nation's GDP decreased by 3.4% after adjusting for inflation. At 4.9% in 2021, Utah's GDP growth is expected to fall below the national average of 5.7%, in part due to base effects following from Utah's strong 2020 growth. Over the past five years Utah's GDP has grown by 19.5% compared to national growth of 5.7%.

Industry Growth

Financial activities remains the largest sector of GDP in Utah at 22.5% in 2020, followed by trade, transportation and utilities at 16.3% of total GDP.

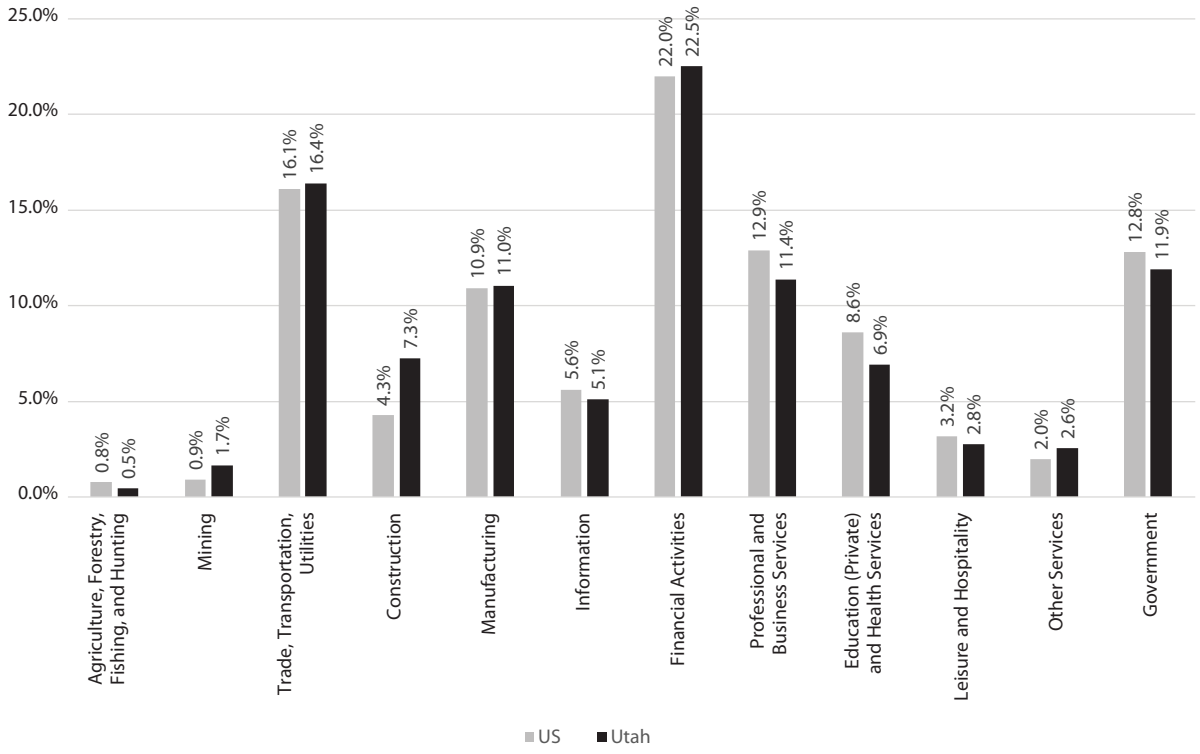
In 2020, the finance, insurance, real estate, rental, and leasing industries added the most real value to the GDP of Utah (about $33.3 billion).

2021/2022 OUTLOOK

Both Utah and U.S. GDP are expected to show strong growth in 2021 at 4.9% and 5.7% respectively. Utah's growth is expected to continue to accelerate at 5.4% in 2022, while national growth is expected to moderate to 4.3%.

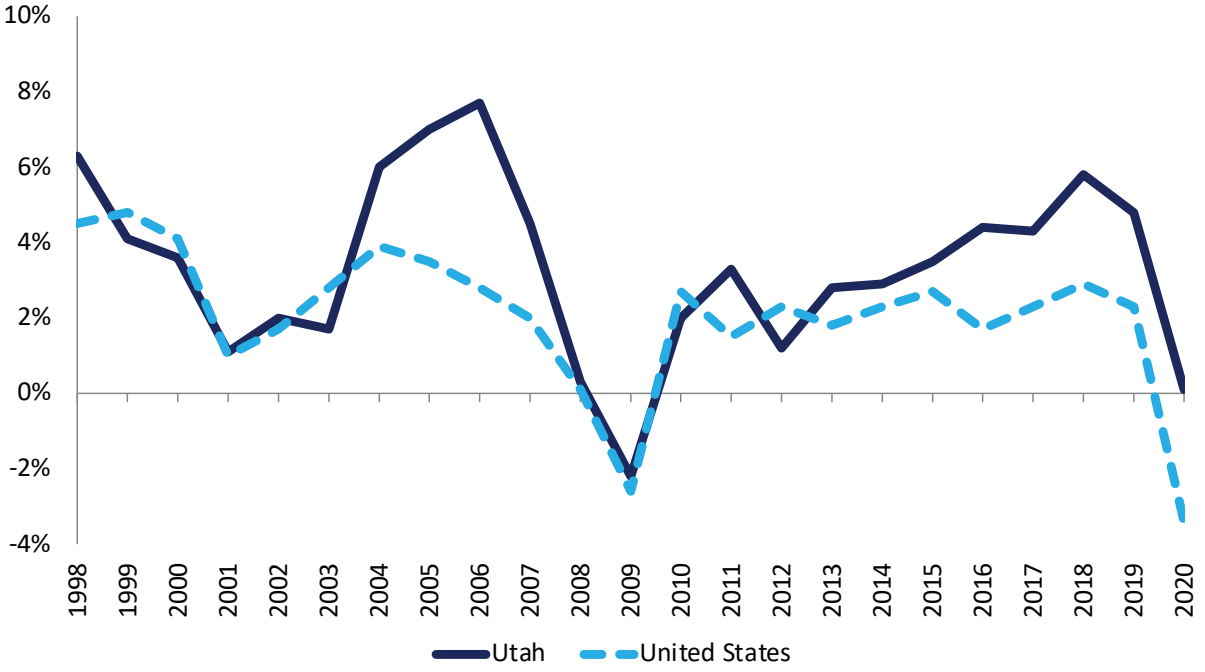
The COVID-19 pandemic still presents some concerns for GDP growth in 2021 and 2022. Inflation worries and supply chain disruptions could drag GDP growth down over the short term. However, pandemic-related constraints on GDP growth will lessen as the various sectors of the economy rebalance.

Figure 4.1: Composition of Gross Domestic Product by Industry, 2020



Source: Bureau of Economic Analysis

Figure 4.2: Utah vs. United States Real Gross Domestic Product Growth



Source: Bureau of Economic Analysis

Table 4.1: Nominal Gross Domestic Product (GDP) by State, 2015–2020

State	Millions of Dollars						2020 Share of Total	2019 –20 Change
	2015	2016	2017	2018	2019	2020		
United States	$18,206,023	$18,695,106	$19,479,623	$20,527,159	$21,372,582	$20,893,746	100.0%	-2.2%
Alabama	202,372	207,368	215,086	224,047	231,172	226,897	1.1%	-1.8%
Alaska	51,491	50,728	53,089	54,712	54,547	49,820	0.2%	-8.7%
Arizona	299,393	313,081	330,416	349,908	369,988	373,719	1.8%	1.0%
Arkansas	117,787	119,152	122,350	127,307	130,840	130,751	0.6%	-0.1%
California	2,473,556	2,569,634	2,730,974	2,895,101	3,052,645	3,007,188	14.4%	-1.5%
Colorado	320,721	329,912	348,898	371,425	392,218	382,585	1.8%	-2.5%
Connecticut	259,488	263,670	271,583	280,692	288,109	276,423	1.3%	-4.1%
Delaware	71,914	69,355	68,764	72,488	77,042	75,787	0.4%	-1.6%
District of Columbia	124,605	129,649	133,391	139,785	144,406	144,555	0.7%	0.1%
Florida	908,520	953,353	1,002,568	1,057,862	1,116,435	1,106,036	5.3%	-0.9%
Georgia	521,008	547,547	574,404	602,340	637,799	622,628	3.0%	-2.4%
Hawaii	81,230	83,914	87,178	90,276	91,781	82,885	0.4%	-9.7%
Idaho	65,900	68,837	71,688	77,494	82,420	83,822	0.4%	1.7%
Illinois	799,931	807,043	827,075	867,536	890,486	858,367	4.1%	-3.6%
Indiana	331,946	340,501	353,150	373,518	381,020	375,337	1.8%	-1.5%
Iowa	180,299	181,011	183,550	190,403	194,323	194,268	0.9%	-0.0%
Kansas	154,958	160,451	164,923	172,328	176,739	175,142	0.8%	-0.9%
Kentucky	193,413	196,485	201,555	208,250	216,102	212,540	1.0%	-1.6%
Louisiana	235,114	227,091	241,704	255,810	254,562	235,437	1.1%	-7.5%
Maine	58,131	60,254	62,413	65,492	68,453	69,272	0.3%	1.2%
Maryland	369,728	387,733	400,406	411,100	421,610	410,675	2.0%	-2.6%
Massachusetts	498,851	514,638	532,354	564,047	593,257	582,477	2.8%	-1.8%
Michigan	474,983	490,264	501,752	520,803	531,435	515,120	2.5%	-3.1%
Minnesota	335,530	344,061	354,684	373,420	383,040	373,739	1.8%	-2.4%
Mississippi	105,915	107,291	109,963	112,407	114,734	113,846	0.5%	-0.8%
Missouri	296,929	300,915	308,722	319,394	332,273	329,367	1.6%	-0.9%
Montana	46,604	45,491	48,440	50,904	51,789	51,509	0.2%	-0.5%
Nebraska	116,515	118,146	121,946	126,923	131,352	133,439	0.6%	1.6%
Nevada	145,116	151,840	160,785	170,353	181,743	170,944	0.8%	-5.9%
New Hampshire	76,478	79,090	80,666	83,844	87,508	87,621	0.4%	0.1%
New Jersey	563,234	575,501	586,375	613,509	639,437	618,579	3.0%	-3.3%
New Mexico	90,274	89,769	92,311	97,269	101,972	98,472	0.5%	-3.4%
New York	1,487,628	1,551,354	1,603,903	1,694,958	1,777,752	1,724,759	8.3%	-3.0%
North Carolina	508,929	526,030	549,671	569,982	595,655	589,829	2.8%	-1.0%
North Dakota	55,997	51,989	55,228	59,093	59,005	54,854	0.3%	-7.0%
Ohio	611,020	623,265	641,746	666,974	693,199	677,561	3.2%	-2.3%
Oklahoma	186,816	181,244	190,675	202,467	203,700	188,057	0.9%	-7.7%
Oregon	200,660	211,306	222,614	237,066	246,647	243,777	1.2%	-1.2%
Pennsylvania	714,203	726,562	745,011	772,611	799,686	771,898	3.7%	-3.5%
Rhode Island	56,391	57,354	57,941	59,129	61,319	60,556	0.3%	-1.2%
South Carolina	205,817	215,120	223,045	233,665	244,662	244,882	1.2%	0.1%
South Dakota	48,070	49,151	50,299	52,404	53,940	54,789	0.3%	1.6%
Tennessee	325,294	336,414	349,838	361,382	376,917	369,574	1.8%	-1.9%
Texas	1,573,498	1,579,015	1,677,111	1,809,706	1,863,954	1,775,588	8.5%	-4.7%
Utah	149,153	157,827	168,058	182,644	195,088	197,562	0.9%	1.3%
Vermont	30,933	31,661	32,247	33,033	34,128	33,435	0.2%	-2.0%
Virginia	483,787	496,021	509,893	531,757	554,306	549,536	2.6%	-0.9%
Washington	466,690	487,275	519,943	564,481	597,874	604,254	2.9%	1.1%
West Virginia	71,319	70,924	74,800	79,045	79,140	75,855	0.4%	-4.2%
Wisconsin	307,508	314,073	318,364	332,264	344,725	337,714	1.6%	-2.0%
Wyoming	38,427	35,879	36,864	39,032	39,601	36,324	0.2%	-8.3%

Last updated: October 1, 2021-- revised statistics for 1997-2020.
Source: Bureau of Economic Analysis

Table 4.2: Real Gross Domestic Product (GDP) by State, 2015–2020

State	Millions of Chained 2012 Dollars						2020 Share of Total	2019–20 Change
	2015	2016	2017	2018	2019	2020		
United States	17,390,295	17,680,274	18,079,084	18,606,787	19,032,672	18,384,687	100.0%	-3.4%
Alabama	191,335	194,284	197,567	200,801	203,384	196,906	1.1%	-3.2%
Alaska	54,741	54,247	54,130	53,250	53,337	50,161	0.3%	-6.0%
Arizona	282,577	291,275	302,455	313,619	323,894	320,551	1.7%	-1.0%
Arkansas	112,351	112,798	113,885	115,938	116,791	114,944	0.6%	-1.6%
California	2,357,453	2,427,895	2,541,769	2,643,576	2,739,343	2,663,666	14.5%	-2.8%
Colorado	312,410	318,953	329,961	342,536	356,774	346,011	1.9%	-3.0%
Connecticut	242,707	243,287	247,359	249,998	251,495	235,889	1.3%	-6.2%
Delaware	66,794	63,001	60,801	61,735	64,262	62,056	0.3%	-3.4%
District of Columbia	116,808	119,644	120,899	123,836	124,990	122,342	0.7%	-2.1%
Florida	852,242	881,539	912,966	943,463	971,619	944,001	5.1%	-2.8%
Georgia	489,182	506,816	524,875	539,300	558,277	536,693	2.9%	-3.9%
Hawaii	75,870	77,304	78,942	79,855	79,175	70,625	0.4%	-10.8%
Idaho	63,081	65,479	66,981	71,075	73,912	73,655	0.4%	-0.3%
Illinois	751,755	749,334	755,595	774,065	777,654	737,644	4.0%	-5.1%
Indiana	313,751	319,602	325,842	337,150	338,350	329,863	1.8%	-2.5%
Iowa	171,127	170,389	170,183	172,929	172,906	169,420	0.9%	-2.0%
Kansas	148,811	153,695	155,408	158,906	160,182	156,770	0.9%	-2.1%
Kentucky	182,916	184,115	185,867	188,084	191,356	185,535	1.0%	-3.0%
Louisiana	233,016	228,429	233,774	236,266	235,948	222,297	1.2%	-5.8%
Maine	54,426	55,565	56,663	58,179	59,434	58,757	0.3%	-1.1%
Maryland	348,152	360,082	366,681	368,644	369,624	353,053	1.9%	-4.5%
Massachusetts	468,061	475,349	484,414	502,954	517,727	498,577	2.7%	-3.7%
Michigan	443,831	452,325	457,765	467,830	467,300	445,683	2.4%	-4.6%
Minnesota	318,913	324,030	328,696	338,525	340,130	326,636	1.8%	-4.0%
Mississippi	100,482	101,255	101,642	101,132	101,525	99,668	0.5%	-1.8%
Missouri	279,021	279,109	282,174	285,995	290,842	282,654	1.5%	-2.8%
Montana	45,396	44,437	45,911	46,614	46,788	46,158	0.3%	-1.3%
Nebraska	111,402	112,612	114,481	116,904	118,287	117,665	0.6%	-0.5%
Nevada	136,347	140,081	145,700	150,712	156,829	145,219	0.8%	-7.4%
New Hampshire	72,042	73,572	74,107	75,535	77,127	75,543	0.4%	-2.1%
New Jersey	529,954	535,055	537,045	550,065	561,843	535,795	2.9%	-4.6%
New Mexico	89,701	89,151	89,032	90,999	94,872	92,697	0.5%	-2.3%
New York	1,373,643	1,403,231	1,419,584	1,457,996	1,494,736	1,420,141	7.7%	-5.0%
North Carolina	475,097	482,969	496,727	504,050	514,625	499,518	2.7%	-2.9%
North Dakota	56,542	52,975	54,083	55,884	56,247	54,581	0.3%	-3.0%
Ohio	578,852	583,946	590,739	598,917	611,146	589,898	3.2%	-3.5%
Oklahoma	197,072	193,025	194,256	197,358	200,711	190,894	1.0%	-4.9%
Oregon	189,947	198,079	205,745	215,209	219,458	212,850	1.2%	-3.0%
Pennsylvania	682,466	688,359	694,237	703,946	716,173	683,774	3.7%	-4.5%
Rhode Island	52,819	52,903	52,609	52,494	53,225	51,415	0.3%	-3.4%
South Carolina	192,020	198,006	202,494	207,773	212,483	208,481	1.1%	-1.9%
South Dakota	45,665	46,076	45,878	46,454	46,641	46,683	0.3%	0.1%
Tennessee	304,484	310,143	318,412	322,649	329,112	316,325	1.7%	-3.9%
Texas	1,605,902	1,619,954	1,664,219	1,729,287	1,785,318	1,734,321	9.4%	-2.9%
Utah	141,721	147,962	154,367	163,327	171,135	171,370	0.9%	0.1%
Vermont	29,119	29,408	29,501	29,616	29,903	28,649	0.2%	-4.2%
Virginia	455,162	459,966	466,725	477,820	487,252	473,818	2.6%	-2.8%
Washington	441,952	458,264	482,824	515,630	535,981	532,862	2.9%	-0.6%
West Virginia	70,663	70,011	71,459	73,114	72,543	69,712	0.4%	-3.9%
Wisconsin	289,077	291,920	292,311	299,416	303,891	291,716	1.6%	-4.0%
Wyoming	40,418	38,189	37,429	37,988	38,628	36,257	0.2%	-6.1%

Last updated: October 1, 2021-- revised statistics for 1997-2020.
Source: Bureau of Economic Analysis

Utah Taxable Sales

5

Eric Cropper, Utah State Tax Commission

2021 OVERVIEW

The COVID-19 pandemic continues to significantly impact Utah taxable sales, which are comprised of sales and purchases subject to sales and use tax. Following above-average increases in 2020, growth in total taxable sales accelerated significantly in 2021, increasing by an estimated 18.9% to $88.9 billion. This growth rate is one of the highest ever seen in Utah and is considerably higher than recent historical rates (which averaged 6.7% over the previous five years). Each of the four major sectors witnessed above-normal growth. Retail sales followed exceptional growth in 2020 with an almost equally strong year in 2021, rising by an estimated 15.6%. Taxable services rebounded by 22.2% after a 5.4% decline in 2020. Both the business investment purchases and the "all other" sales sectors also saw historic levels of growth in 2021, expanding by an estimated 22.6% and 34.5%, respectively. Secondary impacts from the pandemic, such as pent-up demand, federal stimulus and rebounding taxable service industries contributed to this exceptional growth.

Retail Sales

Following 16.0% growth in 2020, retail sales, which accounts for just over 55% of all taxable sales, increased by an estimated 15.6% to $49.3 billion in 2021. These are two of the largest year-over-year growth rates ever recorded in Utah retail sales. Growth in 2021 was primarily driven by strong consumer spending, whereas the additional growth in retail sales the previous year was primarily driven by changing consumer spending patterns due to the pandemic and state legislation that required marketplace facilitators to begin collecting sales and use tax on facilitated sales. Drivers behind this increase in consumer spending in 2021 include significant federal stimulus, pent-up demand, and increased activity by consumers due to the COVID-19 vaccine rollout.

Almost every industry in the retail sector saw significant increases in 2021. The only exception was food and beverage stores. During the early pandemic, consumers substituted expenditures at restaurants with expenditures at grocery stores. Conversely, as consumers felt more comfortable eating out again, they spent more at restaurants and less at grocery stores. Retail industries that saw the largest increases in 2021 included home improvement, electronics, appliances, furniture, clothing, and online retailers.

Business Investment Purchases

After increasing by 10.2% in 2020, business investment purchases jumped by an estimated 22.6% to $14.0 billion in 2021. High growth in this sector was led by the oil and gas, construction, manufacturing, and wholesale trade industries. The oil and gas industry saw significant declines in 2020 with low oil prices brought on by the pandemic, but surging oil prices in 2021 led to a sharp recovery. All other industries in this sector had strong growth in 2020, and their accelerated growth in 2021 was due to a surge in demand resulting from invigorated business and consumer spending. A hot Utah housing market during this time especially benefitted the construction industry. Low long-term interest rates due to accommodative monetary policy also bolstered business investment purchases.

Taxable Services

In 2021, overall taxable services increased by an estimated historical record of 22.2% to $22.1 billion. Many of the largest industries in this sector, including accommodations, recreation, entertainment, and food services, were among the hardest-hit industries in 2020 during the pandemic. However, in 2021 as the impact of available vaccines spread, consumer spending in these industries increased drastically. Growth in

taxable services was fairly consistent in the 10 years prior to the pandemic, averaging 5.1% with minimal deviation. During 2020, taxable services declined 5.4%. The growth rate of 22.2% in 2021 was sufficient to not only return taxable sales in this sector to the historical trend line, but to also put it well above its former trajectory. Performance in this sector can be attributed to pent-up demand from consumers anxious to travel, recreate, and eat at restaurants after so long at home. Federal stimulus also likely contributed to historic consumer spending in the taxable services sector.

All Other

The category "all other" consists of transaction types such as private motor vehicle sales and prior period refunds/payments that do not fit in the other three sectors. In 2021, all other sales, which account for less than 4% of total taxable sales, increased by an estimated 34.5%. This historic rise was primarily due to high growth in private motor vehicle sales, which accounts for the majority of sales in this sector. Elevated volume in private motor vehicle sales began in the second quarter of 2020 and continued in 2021.

2022 OUTLOOK

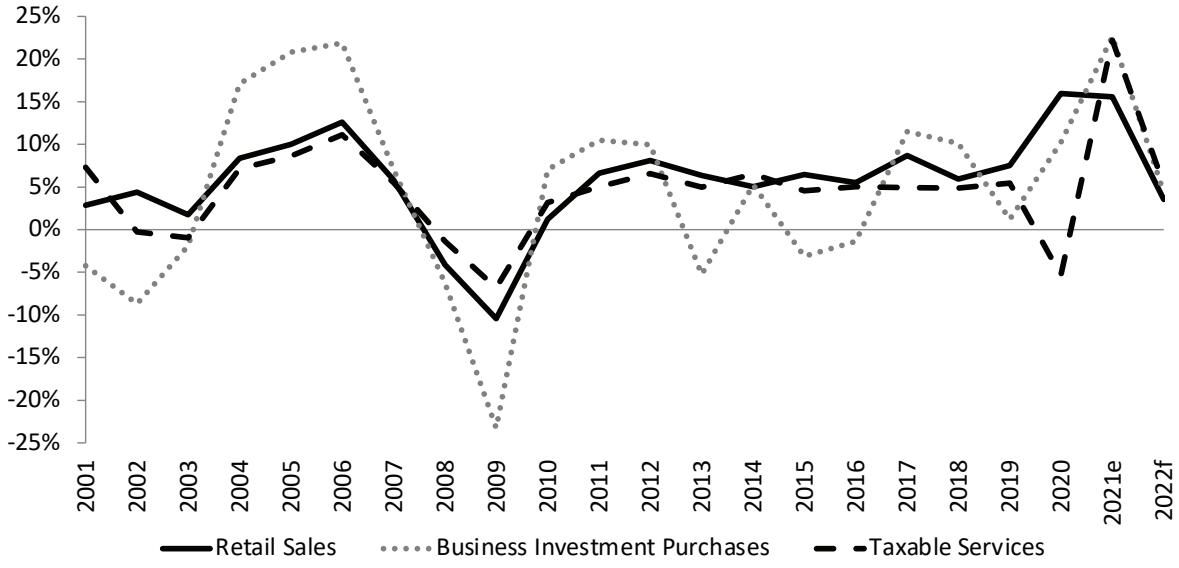
After a year of record increases, strong consumer spending is expected to drive another year of growth in Utah taxable sales, although at a much slower rate. Total taxable sales are forecasted to increase by 4.1% to $92.5 billion in 2022. Growth in each of the four major sectors is forecasted to be much lower than the state witnessed in 2021. After two years of growth above 15%, retail sales is forecasted to increase by 3.6% in 2022. Following a significant recovery in 2021, taxable services is forecasted to return to a more typical growth rate of 5.3%. Growth in business investment purchases and all other sales is also expected to moderate, increasing by a forecasted 4.3% and 3.2%, respectively. Although these growth rates are well below the record growth experienced in 2021, they are signs of a strong economy, as just maintaining the high level of taxable sales from the prior year would be a significant feat. In addition to robust consumer spending, continued progress in the fight against COVID-19 and a labor market that is among the best in the nation are expected to drive growth in Utah's taxable sales in the coming year.

Although growth is forecasted in 2022, significant uncertainty exists. Consumers have been spending at record levels in 2021 and part of 2020, partially due to federal fiscal stimulus and pent-up demand. It is unknown how long and how much the effects from these events will continue to lift consumer spending. Furthermore, the pandemic may have fundamentally modified consumer behavior. For example, changes in how much consumers spend relative to their income and how they distribute their expenditures between taxable and nontaxable purchases have the potential to significantly alter the trajectory of taxable sales in 2022 and later years. Other conditions with the potential to impact 2022 taxable sales are primarily external in nature. These conditions include, but are not limited to, changes in the course of the pandemic (such as an acceleration in cases or new variants), inflation, supply chain issues, monetary and fiscal policy decisions, the national political climate, commodity prices and geopolitical instability. Any significant developments in these and other economic or political conditions could result in changes to employment, disposable income and consumer confidence, which in turn would affect Utah taxable sales.

Summary

In 2021, Utah taxable sales experienced one of the most pronounced years of growth the state has ever seen. Each of the four major sectors saw near-record growth. Indirect impacts of the COVID-19 pandemic—such as pent-up demand, federal stimulus, and vaccine availability—were key drivers of this growth. A labor market which is among the nation's best and strong consumer spending are expected to drive another year of growth in taxable sales in 2022. However, it is unknown how long consumers will continue to spend at levels seen in 2020 and 2021 or what the new normal in consumer spending will look like after the pandemic. These and other external conditions add uncertainty to sales forecasts. Although the outlook for 2022 taxable sales is strong, it is also uncertain.

Figure 5.1: Percent Change in Utah Taxable Sales by Component



e = estimate
f = forecast

Source: Utah State Tax Commission

Table 5.1: 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	$15,664.1	$5,661.3	$9,371.8	$1,780.5	$32,477.6					
2002	16,351.6	5,168.2	9,348.6	1,552.2	32,420.5	4.4	-8.7	-0.2	-12.8	-0.2
2003	16,639.1	5,068.9	9,258.7	1,565.3	32,532.0	1.8	-1.9	-1.0	0.8	0.3
2004	18,028.2	5,934.8	9,918.9	1,529.1	35,411.0	8.3	17.1	7.1	-2.3	8.8
2005	19,833.9	7,171.7	10,774.0	1,632.4	39,412.0	10.0	20.8	8.6	6.8	11.3
2006	22,334.1	8,741.9	11,972.8	1,915.5	44,964.4	12.6	21.9	11.1	17.3	14.1
2007	23,634.2	9,359.4	12,635.3	2,230.7	47,859.6	5.8	7.1	5.5	16.5	6.4
2008	22,656.9	8,767.7	12,459.5	1,944.6	45,828.6	-4.1	-6.3	-1.4	-12.8	-4.2
2009	20,292.1	6,729.3	11,609.5	1,936.2	40,567.1	-10.4	-23.2	-6.8	-0.4	-11.5
2010	20,535.6	7,204.1	11,976.6	1,689.7	41,405.9	1.2	7.1	3.2	-12.7	2.1
2011	21,899.9	7,958.6	12,582.1	1,674.4	44,115.0	6.6	10.5	5.1	-0.9	6.5
2012	23,678.0	8,751.9	13,411.4	1,685.4	47,526.8	8.1	10.0	6.6	0.7	7.7
2013	25,187.6	8,292.4	14,076.6	1,835.6	49,392.2	6.4	-5.3	5.0	8.9	3.9
2014	26,459.1	8,725.8	14,993.6	1,529.9	51,708.4	5.0	5.2	6.5	-16.7	4.7
2015	28,168.6	8,454.4	15,672.7	1,686.2	53,981.9	6.5	-3.1	4.5	10.2	4.4
2016	29,721.2	8,337.3	16,461.2	1,923.0	56,442.7	5.5	-1.4	5.0	14.0	4.6
2017	32,304.5	9,296.2	17,274.2	2,170.5	61,045.4	8.7	11.5	4.9	12.9	8.2
2018	34,219.6	10,236.5	18,115.3	2,392.1	64,963.4	5.9	10.1	4.9	10.2	6.4
2019	36,785.3	10,358.5	19,107.2	2,672.1	68,923.1	7.5	1.2	5.5	11.7	6.1
2020	42,656.2	11,417.7	18,083.9	2,572.8	74,730.7	16.0	10.2	-5.4	-3.7	8.4
2021e	49,299.7	14,001.1	22,100.8	3,460.2	88,861.9	15.6	22.6	22.2	34.5	18.9
2022f	51,060.0	14,610.0	23,270.0	3,570.0	92,510.0	3.6	4.3	5.3	3.2	4.1

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

e = estimate
f = forecast

Source: Utah State Tax Commission

Table 5.2: Utah Taxable Sales by County

	Millions of Dollars						Percent Change	% of Total
County	2015	2016	2017	2018	2019	2020	2019-2020	2020
Beaver	$108.5	$119.9	$99.6	$104.5	$114.8	$134.2	16.9	0.2
Box Elder	641.0	707.1	769.9	791.1	828.5	970.9	17.2	1.3
Cache	1,638.4	1,721.6	1,874.9	1,955.0	2,090.9	2,452.4	17.3	3.3
Carbon	391.1	362.4	382.7	411.3	420.1	439.1	4.5	0.6
Daggett	18.4	16.5	19.7	21.2	21.6	25.0	15.5	0.0
Davis	4,902.9	5,132.1	5,483.5	5,703.9	6,028.6	6,665.9	10.6	8.9
Duchesne	442.8	372.9	478.9	531.1	537.2	476.8	-11.2	0.6
Emery	127.8	136.5	129.1	153.5	154.0	162.4	5.4	0.2
Garfield	128.9	139.1	154.1	157.4	168.6	144.5	-14.3	0.2
Grand	367.7	389.4	424.3	451.0	485.5	467.1	-3.8	0.6
Iron	724.0	783.8	842.6	921.9	995.4	1,153.9	15.9	1.5
Juab	107.0	108.5	117.0	128.2	142.1	164.2	15.6	0.2
Kane	180.9	195.3	216.5	239.9	264.3	271.8	2.8	0.4
Millard	168.4	181.5	190.5	195.0	201.9	235.4	16.6	0.3
Morgan	104.6	107.0	120.1	122.5	139.9	186.4	33.2	0.2
Piute	9.9	9.1	9.6	11.0	14.3	16.1	12.4	0.0
Rich	36.1	40.0	47.1	54.3	62.7	76.4	22.0	0.1
Salt Lake	24,282.4	25,391.5	27,078.0	28,846.0	30,093.2	31,377.7	4.3	42.0
San Juan	150.7	156.3	157.8	189.3	198.5	164.2	-17.3	0.2
Sanpete	237.9	246.1	272.9	285.3	305.1	373.8	22.5	0.5
Sevier	365.9	364.3	391.3	417.4	435.2	484.6	11.3	0.6
Summit	1,745.2	1,869.9	2,002.2	2,102.3	2,286.9	2,256.3	-1.3	3.0
Tooele	702.3	694.2	766.9	799.2	895.3	1,080.7	20.7	1.4
Uintah	972.2	728.5	909.5	941.1	895.7	814.9	-9.0	1.1
Utah	8,151.6	8,670.9	9,565.8	10,164.4	11,242.7	12,811.2	14.0	17.1
Wasatch	476.3	520.8	594.8	667.0	738.4	889.5	20.5	1.2
Washington	2,971.9	3,245.6	3,611.1	3,946.5	4,204.6	4,886.8	16.2	6.5
Wayne	43.6	47.8	55.1	59.6	63.1	66.8	5.8	0.1
Weber	3,924.2	4,117.4	4,385.9	4,654.4	4,923.3	5,589.8	13.5	7.5
Indeterminate*	-140.6	-133.3	-106.1	-61.7	-29.2	-108.1	269.8	-0.1
State of Utah	**53,981.9**	**56,442.7**	**61,045.4**	**64,963.4**	**68,923.1**	**74,730.7**	**8.4**	**100.0**

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

Source: Utah State Tax Commission

Tax Collections

6

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

2021 OVERVIEW

Tax collections grew 36.2% in fiscal year (FY) 2021. While much of the growth was due to the extension of the income tax filing deadline from April 15, 2020, to July 15, 2020, tax collections are estimated to have grown 14.6% even after adjusting for income tax timing. Revenue collections got a boost from a recovering Utah economy and various stimulus measures at the federal level to mitigate the impact of the pandemic.

Unrestricted revenues totaled $10,783.8 million in FY 2021, exceeding the February 2021 forecast (adjusted for legislation) of $9,958.7 million by $825.1 million. Total General Fund revenues rose 12.1%. Education Fund revenues jumped 56.2% due to the delay in the filing date which shifted an estimated $795 million from FY 2020 into FY 2021. Were it not for this timing shift, Education Fund revenues would have increased 17.1%. Transportation Fund revenues grew 8.5%. Revenues from mineral lease royalties and bonuses fell 16.1% in FY 2021.

General Fund

Revenue collections in the unrestricted General Fund grew to $3,171.7 million in FY 2021, increasing 12.1% (following 7.4% growth in FY 2020), largely due to growth in state sales and use tax revenue which jumped 15.9% in FY 2021. Total sales tax, which includes earmarked revenue, increased 15.4% in FY 2021. Some of the factors that contributed to this sales tax revenue growth were a rebounding economy, pent-up demand, higher prices, federal stimulus payments and extended unemployment benefits, increased vaccination rates, and a change in consumer behavior towards goods and away from services. Unrestricted insurance premium taxes rose 10.7% in FY 2021. Liquor profits edged up 1.6%. Beer, cigarette and tobacco taxes were down 5.0% as consumer preferences and consumption patterns changed. Investment income dropped 66.3% as interest rates remained very low. Oil and gas and mining severance tax revenues fell 41.5% and 6.8%, respectively, in FY 2021.

Education Fund

Education Fund revenues increased 56.2% to $6,895.7 million in FY 2021. Individual income tax revenues rose 53.3%, while corporate income tax revenue jumped 108.7% as individual and corporate tax payments were shifted from April 2020 (FY 2020) to July 2020 (FY 2021).

Were it not for the income tax filing extension, individual income taxes would have grown 13.9% in FY 2021, and corporate income taxes would have risen 64.2%. These are still significant increases even after removing the impact of the timing shift. Individual income tax collections benefited from a healthy labor market and growth in capital gains due to a rising stock market, real estate price appreciation, and returns from other investments. Corporate income tax collections benefited from strong overall corporate profits. Corporate and individual income tax revenues may also have been impacted by taxpayers' actions based on expectations of future tax or policy changes.

Transportation Fund

Unrestricted Transportation Fund revenues totaled $665.9 million in FY 2021, an increase of 8.5% compared to the previous fiscal year. Motor fuel tax collections increased 8.1% as more workers returned to in-person work and people were driving more in general. Special fuel tax revenue grew 12.1% as the economy rebounded and commercial activity increased. Other Transportation Fund revenue rose 4.5% in FY 2021.

2022 OUTLOOK

Overall Utah tax collections are forecasted to decline 3.1% in FY 2022. General Fund revenues, however, are expected to grow by 8.0%. Although some moderation is expected, sales taxes are forecasted to increase 9.2% as consumer spending and the labor market remain healthy. Total sales tax, including earmarks, is forecasted to grow 8.9%. Estimated growth in Transportation Fund revenues is 3.2% for FY 2022. Total Education Fund revenues are expected to fall 9.0% in FY 2022, largely consisting of an 8.7% decline in individual income taxes and a 13.0% decline in corporate franchise and income taxes. However, this decline is compared to an artificially high base due to the delay in the filing deadline, which pushed revenues into FY 2021 from FY 2020. After adjusting for the income tax timing shift, Education Fund revenues are forecasted to increase 2.8% in FY 2022 (3.7% growth for individual income taxes and a 5.3% decline for corporate taxes) and total tax collections are forecasted to increase 4.7%.

Potential Risks to the Economy

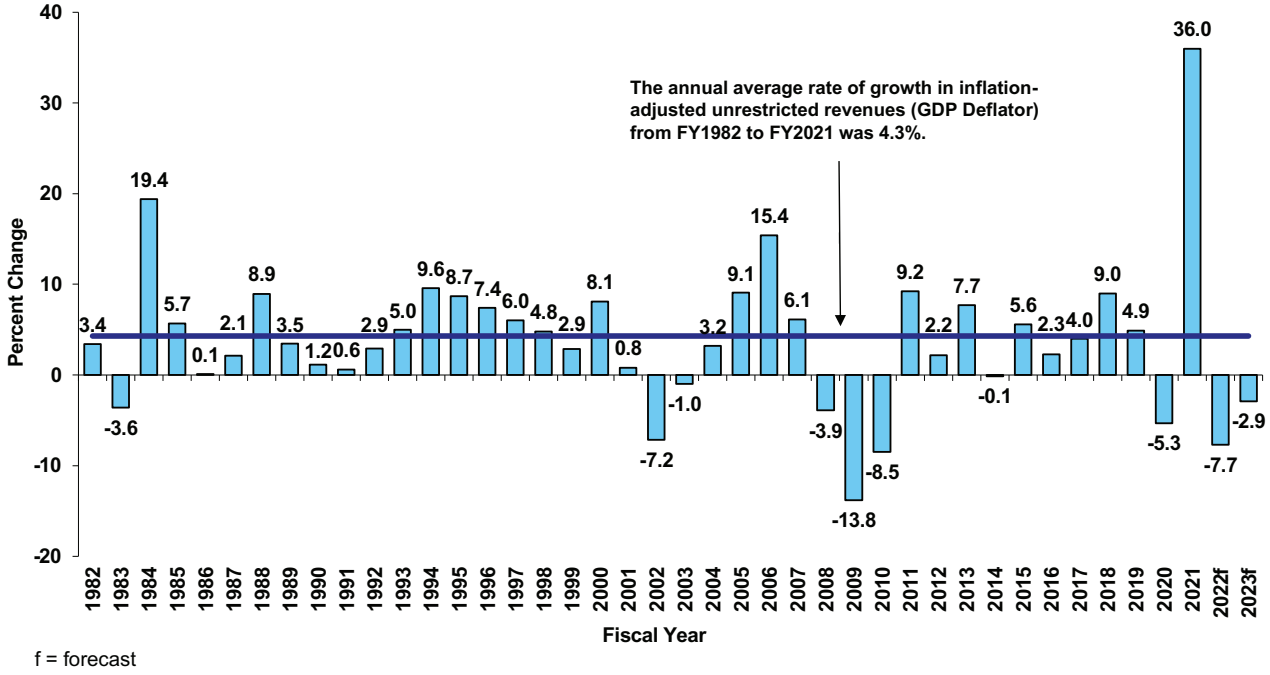
Utah has fared relatively well during the coronavirus pandemic, and the state's economy appears to be on sound footing. However, the economic outlook has a high degree of uncertainty due to national or international developments: possible resurgence of the COVID-19 virus or the emergence of variants resistant to vaccines, broad-based inflation, supply chain bottlenecks, labor shortages, a correction in asset values or the stock market, fiscal or monetary policy changes, a decline in one or more international economies, or geopolitical events. Any of these occurrences could lead to an erosion in business or consumer confidence.

In addition, legislative changes or court decisions have the potential to impact tax collections. For example, during the coronavirus pandemic the federal government extended the filing deadline for individual income and corporate franchise taxes from April 15, 2020, to July 15, 2020. Utah followed suit, pushing revenues into FY 2021 from FY 2020. These or other actions have the potential to affect tax collections.

Summary

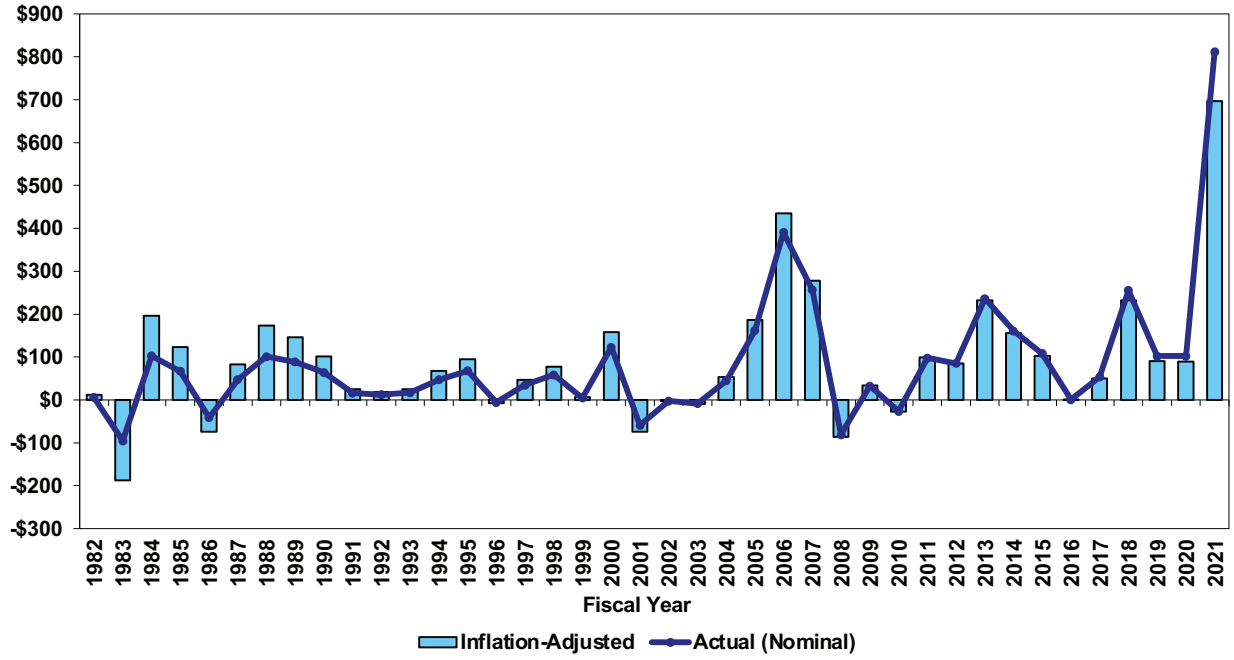
Utah tax collections increased significantly in FY 2021 due to the income tax filing extension from April 15 to July 15, which pushed an estimated $795 million in Education Fund revenues from FY 2020 into FY 2021. Even after correcting for income tax timing considerations, Utah tax collections posted 14.6% growth. Although Utah's economy remains fundamentally sound, there is considerable uncertainty and risk as a variety of factors have the potential to impact the outlook. It remains to be seen what the long-term changes to the economy will be as work and location patterns shift, consumer preferences change, and the business landscape is altered. Changes to the political landscape in Washington could also impact this outlook. Although total tax collections are expected to decrease 3.1% in FY 2022, this decline is compared to an artificially high base resulting from the shift of income tax revenues into FY 2021 due to the filing deadline extension. If the impacts of the income tax timing shifts are removed, the forecast would be for a 4.7% increase in total tax collections in FY 2022.

Figure 6.1: Unrestricted General and Education Fund Revenues
(Inflation-Adjusted Percentage Change)



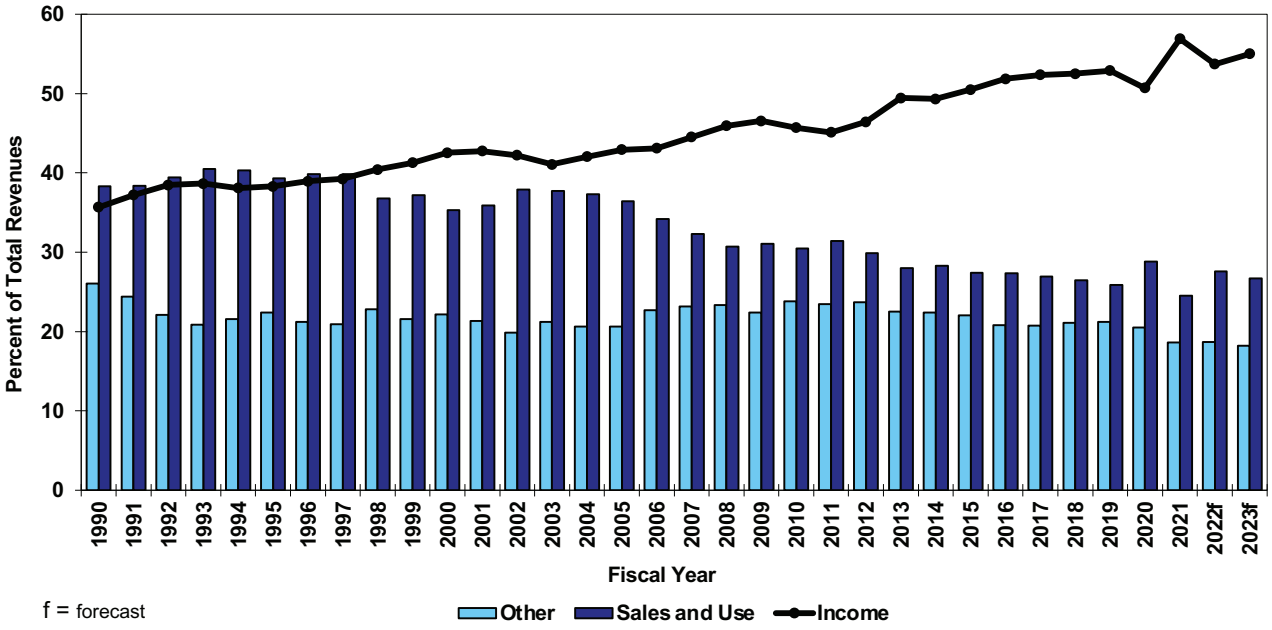
Source: Utah State Tax Commission

Figure 6.2: Actual and Inflation-Adjusted Unrestricted Revenues Surplus/Deficit for the General and Education Fund
(Millions of 2012 Dollars)



Note: Figures not adjusted for the shift in income tax revenues (from FY 2020 into FY 2021) that occurred as a result of the extension of the filing deadline for tax year 2019 from April 15, 2020 to July 15, 2020. Dollars amounts adjusted for inflation from nominal amounts using the GDP implicit price deflator.
Source: Utah State Tax Commission and Governor's Office of Planning and Budget

Figure 6.3 Sales and Use Taxes, Income Tax, and All Other Unrestricted Revenues
(Percent of Total State Unrestricted Revenues)



*Total State Unrestricted Revenues includes General Fund, Education Fund, and Transportation Fund revenues. Mineral lease revenues are not included. The "Other" category includes all other revenue sources in those funds except for Sales and Use and Income tax. These figures are not adjusted for the shift in income tax revenues (from FY 2020 into FY 2021) that occurred as a result of the extension of the filing deadline for tax year 2019 from April 15, 2020 to July 15, 2020.
Source: Utah State Tax Commission and Governor's Office of Planning and Budget

Table 6.1: Fiscal Year Revenue Collections
(Millions of Current Dollars)

Revenue Source	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022f
Sales and Use Tax	$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	2116.3	2265.3	2,625.3	2,865.7
Earmarked Sales and Use Tax	100.2	250.0	325.3	276.3	301.0	189.2	332.1	422.1	452.5	495.8	543.1	585.4	643.5	690.6	815.0	929.3	1,004.4
Total Sales and Use Tax	1,906.4	2,107.8	2,064.7	1,823.8	1,703.7	1,790.6	1,914.6	2,038.0	2,109.3	2,210.7	2,321.6	2,442.1	2,662.3	2,806.9	3,080.3	3,554.6	3,870.1
Cable/Satellite Excise Tax	20.5	20.8	24.1	24.8	25.3	25.4	28.7	26.9	26.0	28.4	28.6	31.3	29.3	28.2	28.4	26.7	26.1
Liquor Profits	47.3	53.2	59.7	59.7	58.4	62.3	70.8	81.4	87.8	95.4	104.0	106.3	112.3	118.1	121.7	123.7	128.3
Insurance Premiums	71.4	71.8	77.2	83.0	80.0	75.9	84.4	89.6	91.2	92.4	111.7	122.0	133.6	136.6	142.2	157.4	160.5
Beer, Cigarette, and Tobacco	60.8	62.4	62.8	60.6	58.7	125.5	125.4	120.9	113.1	115.9	118.3	116.3	112.1	106.0	108.5	103.1	102.4
Oil and Gas Severance Tax	71.5	65.4	65.5	71.0	56.2	59.9	65.5	53.2	89.2	69.7	20.8	9.3	17.4	14.5	19.5	11.4	21.2
Mining Severance Tax	17.0	23.6	26.5	14.6	20.9	27.1	25.4	16.9	15.9	16.3	7.0	6.8	7.6	10.0	10.8	10.0	13.4
Inheritance Tax	7.4	0.5	0.1	0.3	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Investment Income	40.0	83.5	62.8	25.1	5.3	2.4	5.6	6.0	5.0	6.6	7.9	14.3	22.2	34.8	30.5	10.3	11.9
General Fund Other	50.8	58.0	53.4	54.4	80.3	72.3	95.9	80.4	81.8	90.9	69.8	83.8	91.4	75.4	108.0	109.7	102.9
Property and Energy Credit	-5.6	-6.2	-6.4	-6.2	-6.4	-6.0	-6.8	-6.3	-6.0	-5.4	-6.0	-5.6	-5.6	-5.8	-5.9	-5.9	-5.9
General Fund Total	2,187.5	2,290.9	2,165.1	1,934.6	1,781.4	2,046.3	2,077.5	2,084.9	2,160.8	2,225.2	2,240.7	2,341.3	2,539.1	2,634.2	2,829.0	3,171.7	3,426.5
GF & Earmarks Total	2,287.6	2,540.9	2,490.4	2,210.9	2,082.4	2,235.4	2,409.6	2,507.0	2,613.3	2,721.0	2,783.8	2,926.7	3,182.6	3,324.8	3,644.0	4,101.0	4,430.9
Individual Income Tax	2,277.6	2,561.4	2,598.8	2,319.6	2,104.6	2,298.2	2,459.4	2,852.0	2,889.8	3,157.7	3,370.3	3,609.5	3,999.0	4,320.0	3,985.4	6,110.5	5,576.5
Corporate Taxes	366.6	414.1	405.1	255.4	258.4	260.7	268.9	338.2	313.5	373.9	338.3	328.5	447.9	520.9	355.9	742.7	646.4
Mineral Production Withholding	22.7	23.1	23.8	32.5	24.6	26.7	28.3	26.1	32.4	27.1	15.6	15.1	21.6	28.8	26.0	16.2	23.6
Education Fund Other	9.8	18.2	20.1	19.3	24.6	26.6	25.2	27.8	23.2	21.5	25.4	27.1	30.9	39.0	48.1	26.3	26.8
Education Fund Total	2,676.8	3,016.8	3,047.8	2,626.8	2,412.2	2,612.2	2,781.9	3,244.1	3,258.9	3,580.2	3,749.6	3,980.1	4,499.4	4,908.7	4,415.4	6,895.7	6,273.4
GF/EF Total	4,864.2	5,307.7	5,212.9	4,561.4	4,193.6	4,658.5	4,859.3	5,329.0	5,419.7	5,805.4	5,990.3	6,321.4	7,038.5	7,543.0	7,244.4	10,067.4	9,699.9
GF/EF & Earmarks Total	4,964.4	5,557.7	5,538.2	4,837.7	4,494.6	4,847.7	5,191.4	5,751.1	5,872.2	6,301.2	6,533.4	6,906.8	7,682.1	8,233.6	8,059.4	10,996.7	10,704.3
Motor Fuel Tax	240.4	254.7	250.7	235.5	243.3	252.5	253.0	256.9	256.8	261.7	305.2	348.8	354.0	371.6	351.0	379.5	397.2
Special Fuel Tax	101.1	111.1	113.0	101.2	94.4	102.2	104.1	101.4	101.7	100.1	115.5	134.9	134.9	142.3	153.4	172.0	169.5
Other	76.6	78.8	82.4	85.4	73.6	80.7	79.2	81.2	82.0	85.1	89.7	89.8	95.5	106.0	109.6	114.5	120.6
Transportation Fund Total	418.1	444.6	446.0	422.1	411.4	435.4	436.2	439.4	440.5	446.9	510.5	573.5	584.4	619.9	614.0	665.9	687.2
Mineral Lease Payments	170.0	160.9	150.3	189.1	147.2	152.8	194.0	136.9	167.6	141.7	71.4	75.3	78.8	79.5	60.2	50.5	67.5
TOTAL	5,452.4	5,913.2	5,809.2	5,172.7	4,752.2	5,246.7	5,489.5	5,905.3	6,027.8	6,394.1	6,572.2	6,970.2	7,701.8	8,242.4	7,918.5	10,783.8	10,454.7
TOTAL & Earmarks	5,552.6	6,163.2	6,134.6	5,449.0	5,053.2	5,435.9	5,821.6	6,327.4	6,480.3	6,889.8	7,115.3	7,555.6	8,345.3	8,933.0	8,733.5	11,713.1	11,459.0

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

Table 6.2 Fiscal Year Revenue Collections
(Annual Percent Change)

Revenue Source	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022f
Sales and Use Tax	2.9%	-6.4%	-11.0%	-9.4%	14.2%	-1.2%	2.1%	2.5%	3.5%	3.7%	4.4%	8.7%	4.8%	7.0%	15.9%	9.2%
Earmarked Sales and Use Tax	149.6	30.1	-15.1	8.9	-37.2	75.6	27.1	7.2	9.6	9.5	7.8	9.9	7.3	18.0	14.0	8.1
Total Sales and Use Tax	10.6	-2.0	-11.7	-6.6	5.1	6.9	6.4	3.5	4.8	5.0	5.2	9.0	5.4	9.7	15.4	8.9
Cable/Satellite Excise Tax	1.7	15.5	3.0	2.0	0.3	13.0	-6.1	-3.5	9.5	0.6	9.4	-6.3	-3.7	0.5	-5.9	-2.2
Liquor Profits	12.5	12.2	-0.0	-2.2	6.8	13.6	14.9	7.9	8.7	9.0	2.2	5.6	5.2	3.1	1.6	3.7
Insurance Premiums	0.5	7.6	7.5	-3.6	-5.2	11.2	6.1	1.8	1.3	20.9	9.3	9.5	2.3	4.1	10.7	2.0
Beer, Cigarette, and Tobacco	2.6	0.7	-3.6	-3.1	113.8	-0.1	-3.6	-6.4	2.5	2.1	-1.7	-3.5	-5.4	2.3	-5.0	-0.7
Oil and Gas Severance Tax	-8.5	0.1	8.4	-20.8	6.5	9.5	-18.9	67.7	-21.8	-70.2	-55.2	87.4	-16.9	34.8	-41.5	85.3
Mining Severance Tax	38.5	12.5	-45.1	43.2	30.0	-6.3	-33.3	-6.4	3.1	-57.3	-1.9	11.3	31.7	7.2	-6.8	33.5
Inheritance Tax	-93.3	-80.9	236.7	-81.1	113.8	-100.0	0.0									
Investment Income	108.7	-24.8	-60.1	-78.8	-55.0	135.2	6.8	-16.3	30.4	21.0	80.3	55.0	56.9	-12.4	-66.3	16.3
General Fund Other	14.3	-8.0	1.8	47.6	-9.9	32.7	-16.1	1.7	11.1	-23.2	20.0	9.1	-17.5	43.2	1.5	-6.2
Property and Energy Credit	9.9	3.8	-2.6	2.4	-6.4	13.8	-7.7	-5.0	-9.2	10.2	-6.4	0.9	3.1	0.8	0.9	0.4
General Fund Total	4.7	-5.5	-10.6	-7.9	14.9	1.5	0.4	3.6	3.0	0.7	4.5	8.4	3.7	7.4	12.1	8.0
GF & Earmarks Total	11.1	-2.0	-11.2	-5.8	7.3	7.8	4.0	4.2	4.1	2.3	5.1	8.7	4.5	9.6	12.5	8.0
Individual Income Tax	12.5	1.5	-10.7	-9.3	9.2	7.0	16.0	1.3	9.3	6.7	7.1	10.8	8.0	-7.7	53.3	-8.7
Corporate Taxes	13.0	-2.2	-36.9	1.2	0.9	3.1	25.8	-7.3	19.3	-9.5	-2.9	36.4	16.3	-31.7	108.7	-13.0
Mineral Production Withholding	1.4	3.4	36.3	-24.4	8.7	6.2	-8.0	24.1	-16.1	-42.6	-3.0	42.7	33.3	-9.5	-38.0	46.3
Education Fund Other	85.9	10.4	-3.8	27.4	8.1	-5.4	10.4	-16.6	-7.4	18.0	6.8	14.2	26.2	23.2	-45.2	1.8
Education Fund Total	12.7	1.0	-13.8	-8.2	8.3	6.5	16.6	0.5	9.9	4.7	6.1	13.0	9.1	-10.1	56.2	-9.0
GF/EF Total	9.1	-1.8	-12.5	-8.1	11.1	4.3	9.7	1.7	7.1	3.2	5.5	11.3	7.2	-4.0	39.0	-3.7
GF/EF & Earmarks Total	12.0	-0.4	-12.6	-7.1	7.9	7.1	10.8	2.1	7.3	3.7	5.7	11.2	7.2	-2.1	36.4	-2.7
Motor Fuel Tax	5.9	-1.6	-6.1	3.3	3.8	0.2	1.5	-0.0	1.9	16.6	14.3	1.5	5.0	-5.5	8.1	4.6
Special Fuel Tax	9.9	1.7	-10.4	-6.7	8.2	1.9	-2.6	0.3	-1.6	15.4	16.8	-0.0	5.5	7.8	12.1	-1.4
Other	2.8	4.6	3.7	-13.8	9.6	-1.9	2.5	1.1	3.7	5.4	0.1	6.4	10.9	3.4	4.5	5.3
Transportation Fund Total	6.3	0.3	-5.4	-2.5	5.8	0.2	0.7	0.3	1.5	14.2	12.3	1.9	6.1	-1.0	8.5	3.2
Mineral Lease Payments	-5.4	-6.5	25.8	-22.2	3.8	27.0	-29.4	22.4	-15.4	-49.6	5.4	4.7	0.8	-24.3	-16.1	33.8
TOTAL	8.5	-1.8	-11.0	-8.1	10.4	4.6	7.6	2.1	6.1	2.8	6.1	10.5	7.0	-3.9	36.2	-3.1
TOTAL & Earmarks	11.0	-0.5	-11.2	-7.3	7.6	7.1	8.7	2.4	6.3	3.3	6.2	10.5	7.0	-2.2	34.1	-2.2

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

Exports

7

John Gilbert, Utah State University

2020 OVERVIEW[1]

Disruptions to international trade due to the COVID-19 pandemic had a strong negative impact on U.S. merchandise trade volumes overall over the past year, with total U.S. exports of merchandise goods falling by over 13% in 2020. Despite of the dire situation at the national level, Utah was one of only a handful of states in which merchandise exports actually increased in 2020, albeit by a very modest 1.9% over 2019 (in stark contrast to the growth rate of over 20% seen in 2019). The total value of Utah's merchandise exports now stands at $17.7 billion dollars. Utah rose from being the 25th largest exporting state in the nation in terms of overall export value in 2019, to 23rd in the nation in 2020.

The majority of Utah's merchandise export value is generated by the Salt Lake City Metropolitan area, which accounted for nearly 77% of the state's exports in 2020 ($13.6 billion in value, up only slightly from $13.3 billion in 2019). Exports from the next largest metropolitan area, Provo, remained at a similar level to the past few years, totaling just over $1.8 billion (approximately 11% of the Utah total). In contrast, exports from the Ogden area fell from $1.7 billion in 2019 to just over $1.5 billion in 2020 (approximately 9% of total Utah export value). The only region to show strong export growth in 2020 was the Logan area, which increased total exports from $592 million in 2019 to $699 million in 2020, a growth rate of just over 18%. The region remains relatively small in terms of total Utah exports, however, accounting for less than 4% of Utah's total merchandise export value in 2020.

In terms of the industrial composition of Utah's exports in 2020, primary metals remain the largest single export sector by a substantial margin, once again accounting for more than half of the total value of Utah's merchandise exports. The total value of Utah's primary metal exports was nearly $9.2 billion in 2020 (up only slightly relative to 2019). The other significant export categories are the same as last year: computer and electronics ($1.8 billion in value, 10% of the total), chemicals ($1.5 billion in value and just under 9% of the total), and food products (just over $1 billion in value and 6% of total exports).

While exports of primary metals did not grow substantially over the last year, exports of the other top categories did: Exports of computers and electronics increased by nearly 20%, and exports of chemicals by over 18%, while exports of food products increased by over 9%. Significant growth also occurred in other smaller export sectors, such as beverages (up 77.5%), livestock and livestock products (up 230%), and textiles (up 61% in the milled category and 34% in the raw category). Significant export declines were seen in many sectors, however, most notably in the heavy manufactures category: Transportation equipment exports fell 23% to $809 million (4.6% of total Utah merchandise exports), machinery exports declined by 12% to $495 million (3.3% of the total), and exports of electrical equipment fell by nearly 28% to $316 million (roughly 3% of total exports).

The regional pattern of merchandise exports is dominated by the United Kingdom, which purchased over 50% of Utah's exports in 2020 ($8.9 billion in value). Next are the North American trade partners, Canada and Mexico, which accounted for $8.5 billion and 5.3% of exports, respectively ($1.5 billion and $942 million in dollar terms). Rounding out the top five export destinations are China and Japan at 4.2% and 3.8% of the total, respectively ($734 million and $664 million). Including Hong Kong with China increase the total to 5% and $883 million.

While the United Kingdom's position as the major market for Utah's exports was unchanged from 2019, there were some important adjustments in

1. Because exports data have not been published for all of 2021, this chapter summarizes exports for 2020 and provides an outlook for 2021.

other aspects of the regional export pattern. Exports to China, which fell dramatically in 2018 and remained low in 2019 as a result of trade tensions with the U.S., rose back up in 2020 as those tensions eased slightly. Exports to China increased by nearly 28% in 2020, pushing China from up from being the 6th largest Utah export market to the 4th. While Utah's exports to the United Kingdom are heavily dominated by primary metals (nearly 98%), the state's exports to China are much more diverse. China is a particularly important market for Utah's agricultural products industry, and accounted for over 65% of that sector's export value in 2020. Exports to Japan, by contrast, fell by just under 21% to $664 million, dropping from the 3rd largest market to the 5th. The biggest fall was in exports agricultural products, which were less than half of last year's level (from $42 million in 2019 to less than $18 million in 2020). Utah's exporters made progress in developing new markets in Denmark, Austria, Chile and the Philippines.

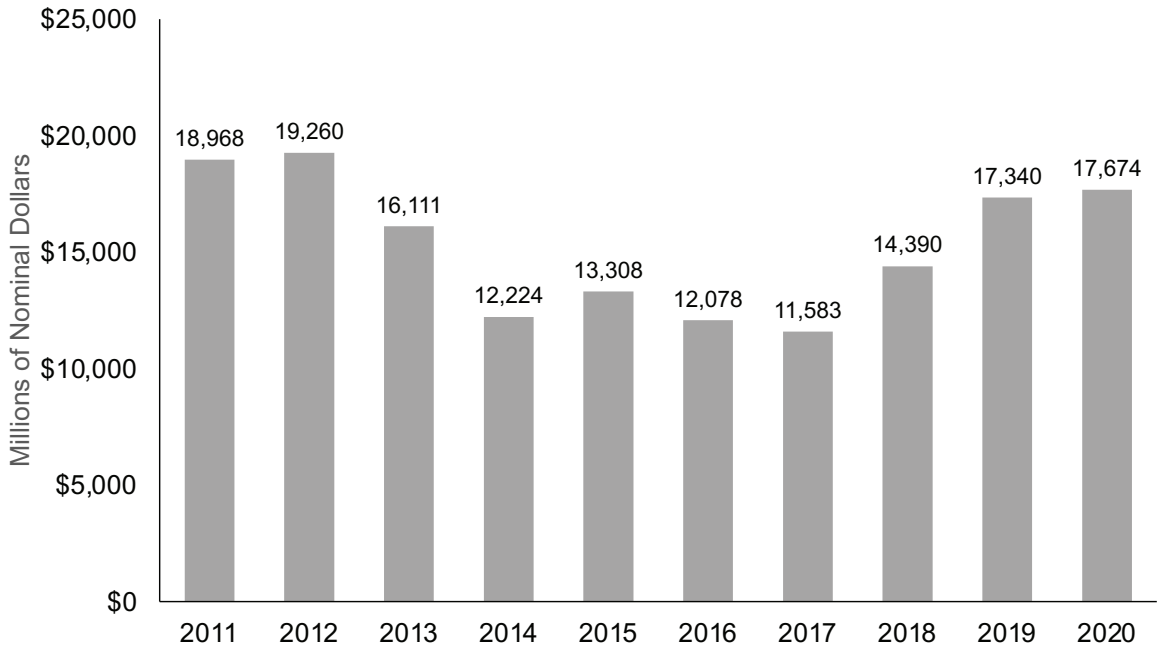
2021 OUTLOOK

The COVID-19 pandemic has introduced considerable uncertainty into global markets. Initial data in 2020 suggested a substantial fall in world trade was likely to occur, but fortunately the effects on merchandise trade have not, so far, been as dramatic as was first feared (although the effect on services trade has been larger). A rapid fall in trade in the first two quarters of 2020 was somewhat offset by an equally rapid rebound in the latter half of the year. Overall, global merchandise trade was actually stagnant in 2020.

While U.S. merchandise exports did fall markedly 2020, the early figures for 2021 are relatively encouraging, and fit a rapid recovery narrative. Total U.S. merchandise export value through September 2021 has increased by just over 23% over the exports in the same period in 2020. Utah's exports have increased by slightly under 10%, comparing the same periods. While these figures are preliminary, and obviously do not include the last quarter, they point to a continuation of the recovery of trade after the COVID-19 shock.

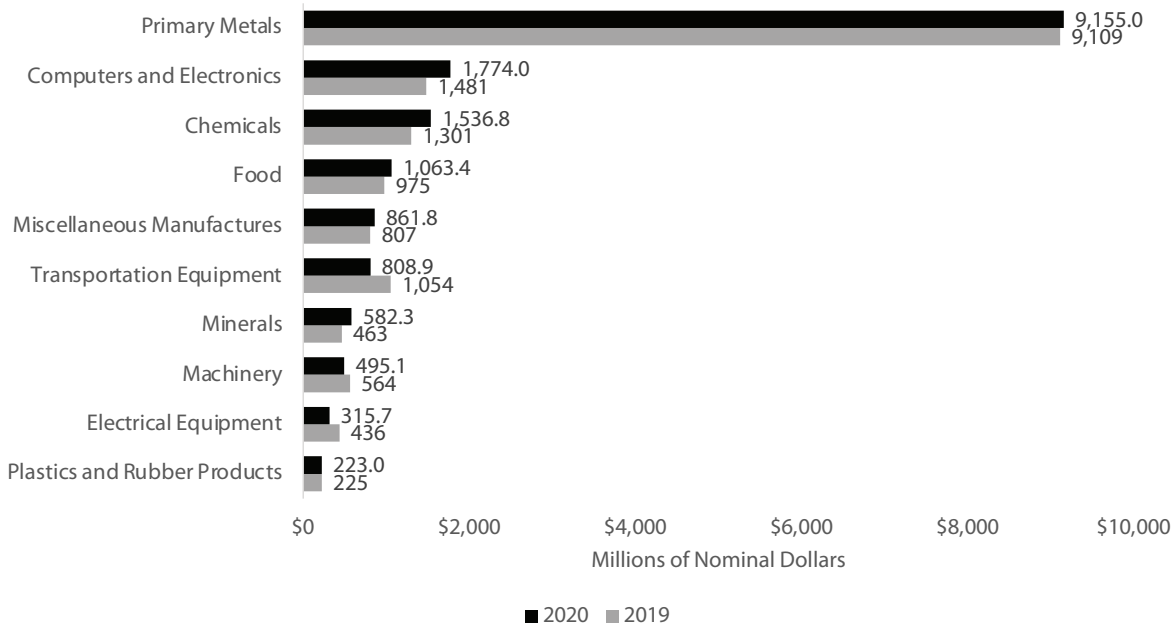
While risks remain, Utah's heavy reliance on primary metal exports, which might be regarded as problematic in other contexts, does limit exposure in the current environment.

Figure 7.1: Utah Merchandise Exports



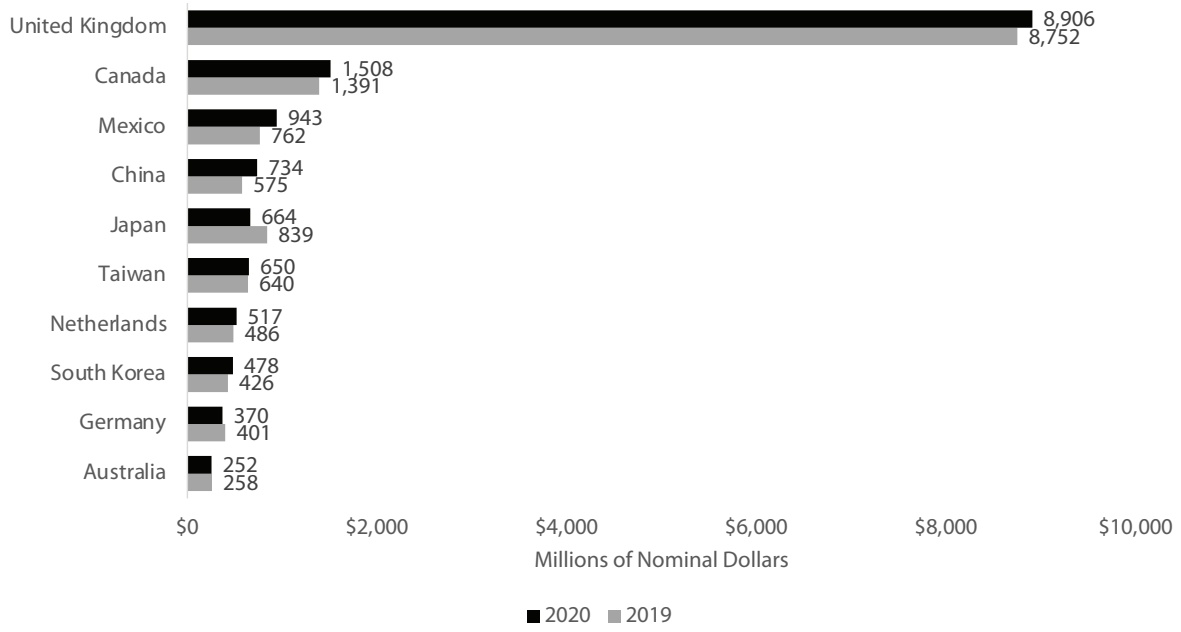
Source: U.S. Census Bureau, USA Trade Online

Figure 7.2: Utah Merchandise Exports of Top Ten Export Industries



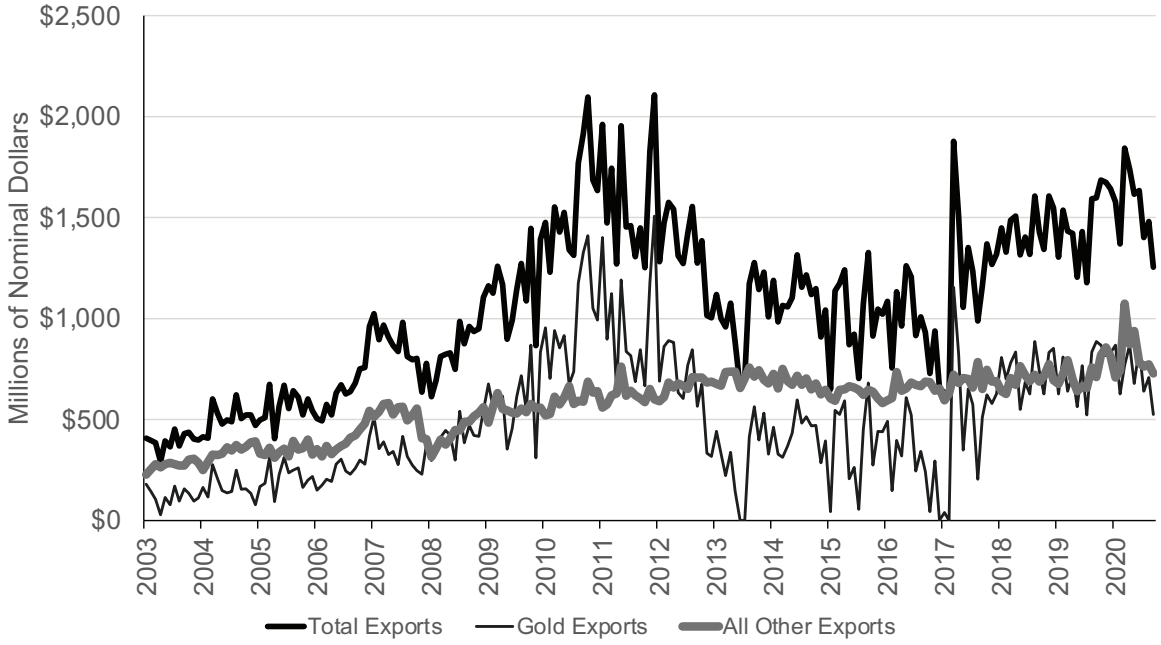
Source: U.S. Census Bureau, USA Trade Online

Figure 7.3: Utah Merchandise Exports to Top Ten Purchasing Countries



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

Figure 7.4: Utah Monthly Exports, With and Without Gold



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

Table 7.1: U.S. Merchandise Exports by State

Rank	Geography	Millions of Current Dollars						Percent Change 2019–2020	2020 Share
		2015	2016	2017	2018	2019	2020		
	United States	$1,503,328	$1,451,460	$1,547,195	$1,665,787	$1,642,820	$1,424,935	-13.3%	100%
24	Alabama	19,322.2	20,471.2	21,797.7	21,416.3	20,795.8	17,153.4	-17.5%	1.2%
39	Alaska	4,620.1	4,350.3	4,941.4	4,833.8	4,988.7	4,610.4	-7.6%	0.3%
22	Arizona	22,654.2	22,003.6	20,917.7	22,515.5	24,582.8	19,756.2	-19.6%	1.4%
37	Arkansas	5,870.9	5,722.2	6,234.1	6,449.3	6,230.9	5,195.6	-16.6%	0.4%
2	California	165,360.4	163,260.6	171,920.4	178,175.2	173,728.2	155,885.8	-10.3%	10.9%
33	Colorado	7,949.6	7,569.5	8,054.5	8,331.7	8,097.5	8,169.1	0.9%	0.6%
26	Connecticut	15,241.8	14,394.0	14,791.6	17,403.5	16,243.3	13,827.7	-14.9%	1.0%
41	Delaware	5,407.7	4,517.5	4,565.5	4,703.8	4,405.5	3,909.2	-11.3%	0.3%
44	Dist of Columbia	1,088.0	1,330.7	1,483.1	2,724.2	3,688.9	2,770.0	-24.9%	0.2%
6	Florida	53,903.1	52,036.3	54,897.3	57,251.7	55,976.5	45,726.8	-18.3%	3.2%
10	Georgia	38,596.0	35,673.2	37,222.5	40,619.1	41,259.7	38,846.3	-5.8%	2.7%
51	Hawaii	1,896.4	795.5	952.4	659.1	453.8	319.9	-29.5%	0.0%
43	Idaho	4,302.1	4,876.9	3,863.0	4,027.9	3,433.5	3,406.6	-0.8%	0.2%
5	Illinois	63,368.7	59,862.1	65,288.0	65,467.7	59,766.6	53,325.2	-10.8%	3.7%
13	Indiana	33,819.1	34,653.1	37,746.6	39,320.4	39,346.5	35,340.4	-10.2%	2.5%
29	Iowa	13,238.4	12,330.3	13,422.4	14,370.4	13,225.1	12,639.4	-4.4%	0.9%
30	Kansas	10,689.5	10,154.6	11,244.1	11,581.8	11,663.2	10,407.5	-10.8%	0.7%
19	Kentucky	27,636.6	29,192.2	30,918.8	31,807.6	33,007.3	24,529.7	-25.7%	1.7%
4	Louisiana	48,678.6	48,367.0	56,865.3	67,232.7	63,876.1	58,367.5	-8.6%	4.1%
47	Maine	2,761.8	2,863.2	2,712.4	2,836.3	2,724.0	2,339.4	-14.1%	0.2%
28	Maryland	10,052.1	9,656.0	9,317.2	12,104.6	13,051.0	12,686.4	-2.8%	0.9%
17	Massachusetts	25,289.3	25,893.0	27,561.2	27,159.7	26,132.2	24,893.0	-4.7%	1.7%
8	Michigan	53,944.9	54,752.0	59,920.7	58,006.6	55,939.5	44,367.0	-20.7%	3.1%
21	Minnesota	20,013.3	19,200.8	20,692.4	22,681.0	22,185.7	20,077.0	-9.5%	1.4%
32	Mississippi	10,848.6	10,504.7	10,984.8	11,585.8	11,832.6	10,292.0	-13.0%	0.7%
27	Missouri	13,646.6	13,935.1	14,289.5	14,512.4	13,449.9	12,789.0	-4.9%	0.9%
48	Montana	1,404.1	1,360.1	1,616.0	1,665.6	1,697.2	1,436.7	-15.3%	0.1%
34	Nebraska	6,663.7	6,381.4	7,209.8	7,947.2	7,460.8	6,980.8	-6.4%	0.5%
31	Nevada	8,666.5	9,765.7	12,162.3	11,137.8	9,048.8	10,318.5	14.0%	0.7%
35	New Hampshire	4,001.3	4,143.4	5,147.8	5,305.8	5,827.4	5,457.3	-6.4%	0.4%
11	New Jersey	32,063.0	31,164.5	34,257.7	35,305.4	35,698.9	38,018.0	6.5%	2.7%
42	New Mexico	3,781.7	3,616.2	3,695.7	3,899.2	4,679.0	3,688.0	-21.2%	0.3%
3	New York	83,124.5	76,690.9	78,190.0	84,734.2	75,602.6	65,596.4	-13.2%	4.6%
15	North Carolina	30,201.8	30,183.3	32,620.1	32,765.0	34,336.7	28,463.5	-17.1%	2.0%
38	North Dakota	4,027.2	5,294.2	6,148.0	7,800.2	6,971.7	5,170.7	-25.8%	0.4%
7	Ohio	51,261.9	49,330.2	50,070.8	54,392.8	53,224.2	45,065.6	-15.3%	3.2%
36	Oklahoma	5,250.7	5,046.3	5,363.5	6,112.3	6,142.1	5,384.5	-12.3%	0.4%
18	Oregon	20,057.3	21,771.8	21,894.0	22,331.6	23,598.1	24,873.0	5.4%	1.7%
12	Pennsylvania	39,439.4	36,452.6	38,640.2	41,150.2	42,740.5	37,398.8	-12.5%	2.6%
45	Rhode Island	2,132.7	2,278.4	2,391.4	2,405.4	2,675.2	2,357.8	-11.9%	0.2%
14	South Carolina	31,021.2	31,323.6	32,201.7	34,626.8	41,461.4	30,291.6	-26.9%	2.1%
49	South Dakota	1,420.5	1,218.1	1,356.2	1,429.6	1,356.1	1,378.6	1.7%	0.1%
16	Tennessee	32,616.8	31,475.7	33,233.2	32,716.9	31,087.2	28,114.6	-9.6%	2.0%
1	Texas	248,780.4	231,527.5	265,067.8	315,843.0	328,453.5	276,369.1	-15.9%	19.4%
23	**Utah**	**13,307.6**	**12,077.6**	**11,583.3**	**14,390.0**	**17,339.9**	**17,674.0**	**1.9%**	**1.2%**
46	Vermont	3,176.4	2,993.1	2,776.5	2,920.5	2,841.6	2,357.3	-17.0%	0.2%
25	Virginia	17,801.1	16,310.7	16,508.0	18,336.4	17,825.5	16,392.7	-8.0%	1.2%
9	Washington	86,374.7	79,562.4	76,350.9	77,868.2	60,341.3	41,140.2	-31.8%	2.9%
40	West Virginia	5,832.7	5,045.4	7,110.3	8,232.5	5,948.8	4,565.1	-23.3%	0.3%
20	Wisconsin	22,442.0	21,036.4	22,305.4	22,716.4	21,667.3	20,499.6	-5.4%	1.4%
50	Wyoming	1,175.0	1,098.7	1,196.4	1,357.0	1,367.2	1,163.8	-14.9%	0.1%

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

Table 7.2: Utah Merchandise Exports by Industry

Rank	Code	Industry Name	Millions of Current Dollars						Percent Change 2019–2020	2020 Share
			2015	2016	2017	2018	2019	2020		
		All Commodities	$13,307.6	$12,077.6	$11,583.3	$14,390.0	$17,339.5	$17,674.0	1.9%	100%
1	331	Primary Metals	5,562.5	4,854.4	3,888.7	6,422.3	9,109.5	9,155.0	0.5%	51.8%
2	334	Computers and Electronics	2,121.4	1,718.1	1,848.3	1,569.3	1,481.5	1,774.0	19.7%	10.0%
3	325	Chemicals	1,095.5	1,063.3	1,110.0	1,238.5	1,301.2	1,536.8	18.1%	8.7%
4	311	Food	932.4	922.0	909.7	999.4	975.1	1,063.4	9.1%	6.0%
5	339	Miscellaneous Manufactures	634.7	702.1	739.9	782.1	807.2	861.8	6.8%	4.9%
6	336	Transportation Equipment	811.9	865.4	945.7	884.3	1,053.8	808.9	-23.2%	4.6%
7	212	Minerals	317.5	128.6	325.5	386.9	463.3	582.3	25.7%	3.3%
8	333	Machinery	522.1	497.9	523.4	612.8	563.6	495.1	-12.1%	2.8%
9	335	Electrical Equipment	331.5	371.9	379.5	410.5	436.0	315.7	-27.6%	1.8%
10	326	Plastics and Rubber Products	178.0	161.9	175.7	206.1	225.1	223.0	-0.9%	1.3%
11	332	Fabricated Metals	198.7	174.2	155.5	192.5	203.4	173.9	-14.5%	1.0%
12	910	Waste and Scrap	168.6	159.3	136.5	221.5	160.3	157.7	-1.6%	0.9%
13	111	Agricultural Products	101.6	90.7	86.1	115.8	155.5	132.4	-14.9%	0.7%
14	312	Beverages	38.7	29.7	29.6	39.1	39.5	70.0	77.5%	0.4%
15	322	Paper	28.1	32.0	29.2	32.7	41.7	52.9	27.0%	0.3%
16	112	Livestock and Livestock Products	6.0	4.5	5.3	8.2	11.2	37.1	230.5%	0.2%
17	314	Milled Textiles	21.1	22.1	22.3	19.0	21.7	35.0	61.2%	0.2%
18	313	Raw Textiles	39.1	79.4	61.6	26.5	25.1	33.8	34.3%	0.2%
19	327	Nonmetallic Minerals	42.9	43.1	61.4	59.8	54.1	31.8	-41.3%	0.2%
20	990	Other Special Classification	24.6	29.9	33.8	27.1	80.9	27.9	-65.5%	0.2%
21	337	Furniture and Fixtures	48.2	34.9	26.3	30.9	32.6	27.8	-14.6%	0.2%
22	316	Leather	18.8	17.1	22.4	23.1	22.3	15.9	-28.7%	0.1%
23	323	Printed Material	18.7	23.2	21.2	24.9	16.4	14.7	-10.4%	0.1%
24	315	Apparel and Accessories	14.8	12.1	13.1	14.7	21.7	14.4	-33.5%	0.1%
25	920, 930	Used Merchandise	13.4	12.3	15.9	19.7	18.5	13.3	-28.4%	0.1%
26	321	Wood Products	3.4	5.4	7.9	9.4	6.9	8.4	21.3%	0.0%
27	324	Petroleum and Coal Products	11.4	19.4	5.7	4.9	6.9	6.5	-6.3%	0.0%
28	113	Forestry Products	6.0	4.5	5.3	8.2	11.2	2.5	0.0%	0.0%
29	114	Fish and Other Marine Products	0.6	0.9	1.0	1.7	0.6	1.3	113.7%	0.0%
30	211	Oil and Gas	0.0	0.0	0.3	5.0	2.1	0.7	-65.3%	0.0%
31	980	Goods Returned	0.2	0.1	0.2	0.2	0.2	0.2	6.3%	0.0%
32	511	Publications	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0%

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

Table 7.3: Utah Merchandise Exports by Purchasing Country and Region

Rank	Country	Millions of Current Dollars						Percent Change 2019–2020	2020 Share 2016 Share
		2015	2016	2017	2018	2019	2020		
	World Total	$13,307.6	$12,077.6	$11,583.3	$14,390.0	$17,339.9	$17,674.0	1.9%	100%
1	United Kingdom	3,036.6	3,074.0	2,318.7	5,096.2	8,751.8	8,906.3	1.8%	50.4%
2	Canada	1,491.9	1,322.7	1,212.6	1,790.7	1,391.3	1,508.5	8.4%	8.5%
3	Mexico	853.9	740.9	674.7	725.5	762.4	942.9	23.7%	5.3%
4	China	841.0	648.3	738.0	575.9	575.0	734.0	27.7%	4.2%
5	Japan	547.7	504.0	611.4	811.7	838.9	663.8	-20.9%	3.8%
6	Taiwan	710.2	610.1	636.1	712.2	639.5	649.9	1.6%	3.7%
7	Netherlands	364.9	448.6	406.7	446.9	486.2	517.2	6.4%	2.9%
8	South Korea	376.8	318.3	346.7	401.6	426.2	478.1	12.2%	2.7%
9	Germany	266.5	343.3	394.0	404.5	400.7	370.4	-7.6%	2.1%
10	Australia	190.5	189.5	250.5	273.2	258.1	252.2	-2.3%	1.4%
11	Singapore	358.7	291.2	396.1	180.9	204.0	238.3	16.8%	1.3%
12	France	129.8	172.0	180.9	216.1	214.8	221.0	2.9%	1.3%
13	Belgium	127.5	87.6	98.0	128.4	167.2	198.1	18.5%	1.1%
14	Hong Kong	1,947.3	1,506.8	1,618.1	738.3	144.5	148.8	3.0%	0.8%
15	Italy	167.4	173.4	194.0	162.2	128.4	146.2	13.8%	0.8%
16	Switzerland	219.1	209.0	98.5	165.0	402.9	128.9	-68.0%	0.7%
17	Malaysia	98.1	75.9	91.3	84.2	110.4	119.1	7.9%	0.7%
18	Philippines	112.6	47.8	49.2	63.2	54.7	93.3	70.6%	0.5%
19	Brazil	92.8	103.2	155.8	103.7	105.8	82.2	-22.3%	0.5%
20	Ireland	44.0	36.6	40.3	32.5	53.7	81.8	52.3%	0.5%
21	Chile	66.2	34.0	59.1	42.9	55.5	76.6	38.1%	0.4%
22	Austria	46.5	58.5	48.2	45.5	55.4	75.7	36.7%	0.4%
23	India	201.7	101.5	58.7	224.3	138.3	74.8	-45.9%	0.4%
24	Indonesia	58.5	33.7	37.8	41.0	45.7	66.8	46.2%	0.4%
25	Spain	44.8	63.2	79.9	93.3	78.3	51.0	-34.8%	0.3%
26	Israel	40.6	49.4	57.1	63.5	60.4	49.3	-18.4%	0.3%
27	Denmark	7.7	9.4	9.7	11.0	10.2	43.3	324.6%	0.2%
28	United Arab Emirates	68.9	38.5	38.5	41.3	32.9	39.8	21.0%	0.2%
29	Thailand	147.6	129.7	63.4	57.7	37.3	35.9	-3.8%	0.2%
30	South Africa	37.1	24.8	21.7	22.0	28.5	35.9	25.7%	0.2%
31	Russian Federation	15.2	16.8	18.9	19.0	20.4	34.8	70.1%	0.2%
32	New Zealand	20.1	22.0	29.1	26.8	28.0	32.0	14.4%	0.2%
33	Ecuador	18.5	22.1	26.4	31.4	38.3	30.5	-20.2%	0.2%
34	Colombia	27.3	17.8	17.9	30.2	26.0	30.4	16.9%	0.2%
35	Costa Rica	23.7	32.9	28.6	31.1	23.8	29.8	25.6%	0.2%

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

Table 7.4: Utah Merchandise Exports by Top Ten Purchasing Countries by Industry, 2019

Code	Industry Name	Millions of Current Dollars										
		United Kingdom	Canada	Mexico	China	Japan	Taiwan	Netherlands	South Korea	Germany	Australia	10-Country Industry Total
	All Commodities	$8,906.3	$1,508.5	$942.9	$734.0	$663.8	$649.9	$517.2	$478.1	$370.4	$252.2	$15,023.2
111	Agricultural Products	0.1	1.1	2.3	86.2	17.6	5.6	0.1	15.4	0.2	0.0	128.5
112	Livestock and Livestock Products	0.0	0.7	1.4	0.4	0.0	0.0	0.0	0.0	0.0	0.0	2.5
113	Forestry Products	0.0	0.9	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	1.1
114	Fish and Other Marine Products	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8
211	Oil and Gas	0.0	0.0	0.7	135.5	0.0	0.0	0.0	0.0	0.0	0.0	136.2
212	Minerals	0.2	16.1	72.2	65.1	35.9	0.3	13.2	87.1	1.2	0.1	291.5
311	Food	4.7	113.3	75.2	0.1	85.5	60.1	51.2	152.5	2.3	58.0	602.8
312	Beverages	0.7	6.5	5.0	0.9	3.2	7.0	10.1	0.1	0.2	8.6	42.4
313	Raw Textiles	0.2	1.6	24.9	0.4	0.9	0.0	0.2	0.1	0.4	0.4	29.3
314	Milled Textiles	0.3	15.8	5.2	1.7	0.9	0.8	0.8	0.6	0.2	6.5	32.8
315	Apparel and Accessories	0.6	3.4	0.5	0.3	2.6	0.1	0.4	0.8	0.8	0.4	9.8
316	Leather	0.2	3.0	1.9	0.0	1.3	0.1	5.2	0.5	0.4	0.5	13.2
321	Wood Products	0.0	5.2	2.2	4.6	0.0	0.0	0.1	0.0	0.0	0.1	12.3
322	Paper	1.2	19.3	8.9	0.9	0.4	0.5	1.6	0.1	5.6	1.2	39.8
323	Printed Material	1.0	4.4	1.5	0.0	0.3	0.0	1.0	0.1	0.2	0.6	8.9
324	Petroleum and Coal Products	0.0	5.4	1.0	130.5	0.0	0.0	0.0	0.0	0.0	0.0	136.9
325	Chemicals	16.0	230.6	68.1	11.5	93.5	58.6	136.0	102.3	37.8	61.8	816.3
326	Plastics and Rubber Products	34.2	74.7	25.4	1.8	10.1	1.1	1.3	5.6	5.6	2.1	161.9
327	Nonmetallic Minerals	0.3	6.4	2.1	0.9	0.1	1.5	0.4	0.1	0.1	5.0	16.9
331	Primary Metals	8,698.2	317.9	13.2	11.5	3.5	0.4	0.3	23.7	1.4	1.3	9,071.4
332	Fabricated Metals	2.4	54.3	16.2	33.0	2.9	10.4	1.0	1.4	10.6	11.1	143.2
333	Machinery	35.4	127.4	19.5	116.1	22.1	44.7	11.9	7.3	16.5	30.8	431.7
334	Computers and Electronics	45.1	111.0	267.8	17.5	187.5	443.5	53.6	24.8	111.4	28.0	1,290.2
335	Electrical Equipment	17.1	54.6	60.0	24.0	7.3	3.7	60.2	7.3	18.6	6.8	259.6
336	Transportation Equipment	23.6	194.2	197.3	1.2	41.2	1.4	2.6	15.6	101.8	10.4	589.2
337	Furniture and Fixtures	1.8	11.5	8.0	77.8	0.7	0.2	0.1	0.4	0.6	0.7	101.9
339	Miscellaneous Manufactures	20.5	68.8	46.7	0.0	142.5	4.5	165.5	23.0	53.1	17.0	541.5
511	Publications	0.0	0.0	0.0	11.1	0.0	0.0	0.0	0.0	0.0	0.0	11.1
910	Waste and Scrap	0.0	49.5	14.6	0.0	1.7	5.2	0.1	8.7	0.7	0.0	80.4
920, 930	Used Merchandise	0.6	4.7	1.1	0.4	0.1	0.0	0.1	0.1	0.1	0.3	7.5
980	Goods Returned	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2
990	Other Special Classification	1.0	6.0	0.2	0.6	1.8	0.1	0.2	0.6	0.6	0.3	11.4

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

Price Inflation and Cost of Living

8

David Stringfellow, Office of the Utah State Auditor

INTRODUCTION

Understanding the mechanics of what higher inflation means to people, and avoiding errant thinking in how price changes impact our economy, is an increasingly relevant issue.

For a family looking at the increasing cost of their weekly groceries, inflation is highly personal. It can seem cold to think about inflation as a technical measure of how the prices of all goods and services change over time. Prices can change due to supply constraints faced by businesses, or to shifts in what consumers demand. It is also affected by the total amount of money available in an economy and our collective expectations about the future. In short, whether an expert or an ordinary person – inflation is a phenomenon that concerns everyone in society.

As an economy grows, the amount of money should also grow if prices are to remain stable. Stable prices are desirable because they allow 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. But significant or sudden disruptions to normal economic activity – such as a pandemic – can also upset things we typically take for granted, like the value and function of money. From federal stimulus to supply chain problems, our collective response to changes in purchasing patterns causes price changes.

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. The Fed warns that an inflation rate "that is too high may reduce the public's ability to make accurate long term economic decisions." Conversely, "deflation" — a harmful economic phenomenon where prices, and perhaps wages, fall—has been a concern this last decade.

While the long-term inflation trend is clear, about $15 in 1970 could buy the same amount of similar goods as $100 today. Items that cost $55 in 1990 would now cost around $100 to purchase.

Inflation does not affect all areas in the same way: across regions and the difference in the baskets of goods consumed between urban and rural areas. The most recent Regional Price Parities (RPPs), show Utah's 2019 RPP remained the same relative to 2018 at 96.5. The cost of living in Utah is lower than the national average and 17% lower than in California. The relative prices of goods fell compared to the rest of the country, while our rents accelerated closer to the national average for housing services. Analysis of U.S. Metropolitan Statistical Areas shows less urban areas experienced faster inflation than the dense areas (see chart). This is also consistent with inflation measured at the Regional level.

2021 OVERVIEW

Year-over inflation stayed below 4% for over 150 months – the Consumer Price Index (CPI) exceeded 6% according to the Bureau of Labor statistics in October 2021, a rate unseen in over 30 years. While various measures of inflation exist, all are now elevated. For example, the Federal Reserve utilizes the Personal Consumption Expenditures (PCE) index as their preferred measure of inflation. For November, it was 5.7% overall, 8.5% for goods, and 4.3% for services on a year-over basis.

The Federal Reserve first used the word "transitory" to reflect a sharp change in inflation in April 2021. Economic staff described readings above expectation in the Federal Open Market Committee (FOMC) policy meeting minutes – "inflation was forecast to be temporarily boosted this year by the expected emergence of some production bottlenecks and supply constraints." The surge is lasting longer than some policymakers expected.

A general price increase is an evaluation of the changes in price among billions of transactions across a multitude of goods and services. People also care about the prices of particular goods and how it impacts their own consumption. Semiconductor shortages have dampened vehicle production, driving up prices in both new and used car markets. There is discussion of curbing oil and gasoline price increases, up 50% from last year, with sales from the U.S. Strategic Petroleum Reserve. The demand to drive around the country surged this year. Ships are anchored at port, waiting to unload goods at crowded ports. Warehouses are full and truck drivers are in short supply.

Businesses are raising prices. Workers are experiencing wage increases, especially at the lower end of the income distribution. This is affecting future expectations. While some forecasters think inflation will stabilize near 2% next year, other financial experts evaluating market conditions expect leveling closer to 3%. Former government stimulus programs spiked personal savings rates throughout the year – yielding trillions to consumers. A sizeable federal infrastructure bill and added spending on federal programs might put increased pressure on resources and general prices.

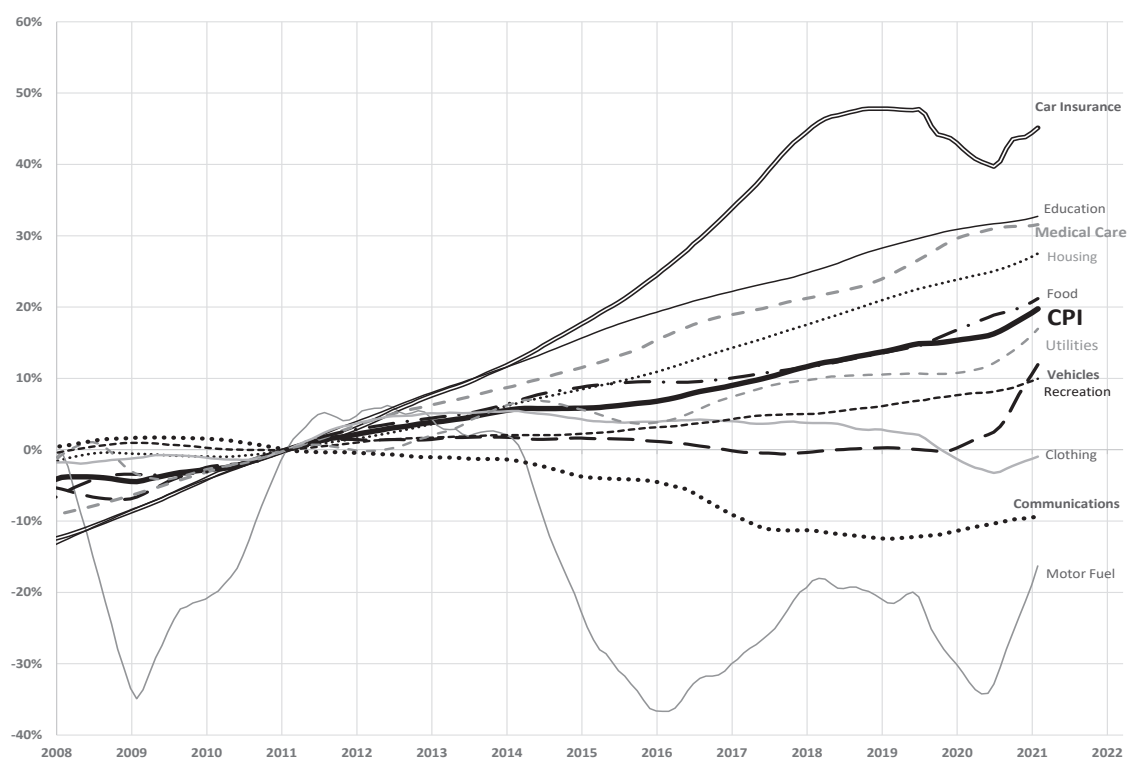
Exactly how all of this combines to affect future inflation is an open question. The details are telling; only two major categories had price changes slower this year than was typical in the last decade. Education and Medical Care prices still went up by 2% and 1.3% respectively this year. Motor fuel prices rebounded 50% after collapsing in 2020. Car insurance also recovered, up over 6%. Housing, shelter, and food prices expanded by nearly 5%. Utilities were up over 10%, repair parts were close behind, while vehicles and transportation experienced double-digit price increases over 15%.

2022 OUTLOOK

While higher inflation is not a crisis, it is a cause for concern. Policymakers would do well to take the short-term and long-run effects of their actions into account and adjust policy accordingly based upon thoughtful analysis to navigate both the end of the pandemic and the evolving structures of our future economy.

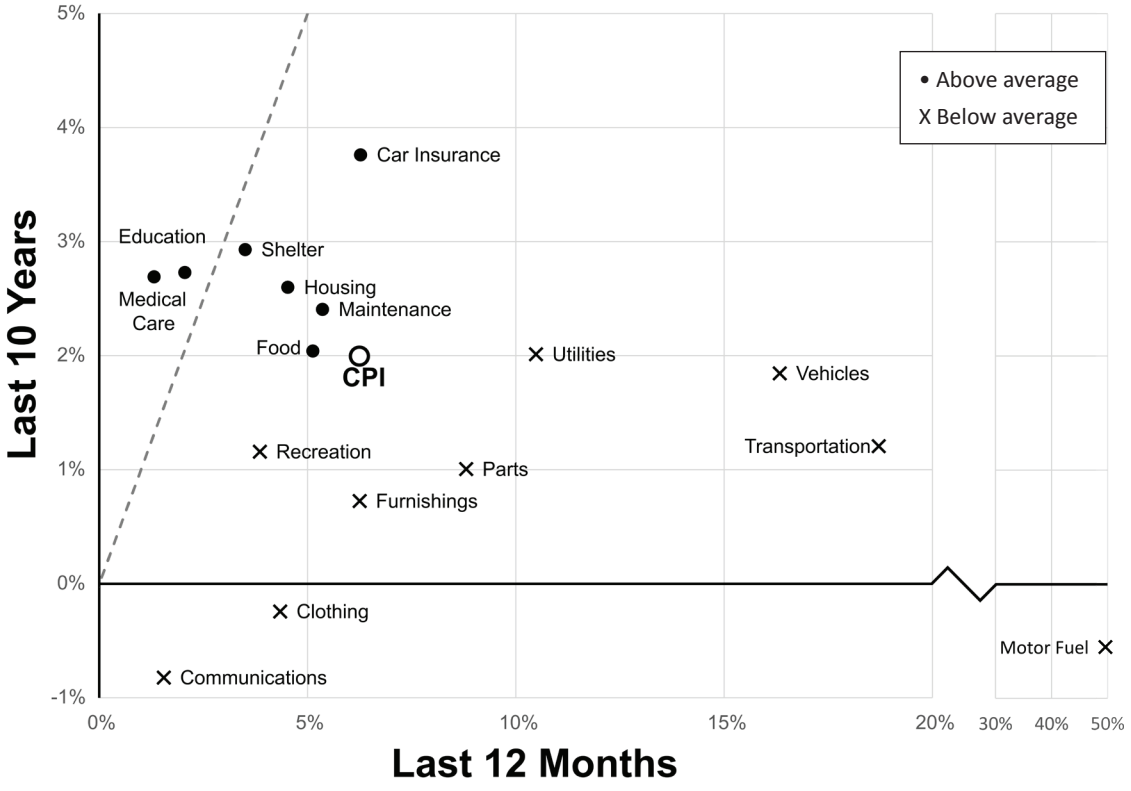
Inflation for 2022 is expected to moderate but remain higher than the country has experienced the last decade (latest forecast is for an average of 3.7% over the year). Inflation will likely remain in the news, as it will be a point of focus for economic experts, politicos, businesses, and everyone that uses money.

Figure 8.1: Cumulative Percent Change in Consumer Price Index (CPI) this Decade



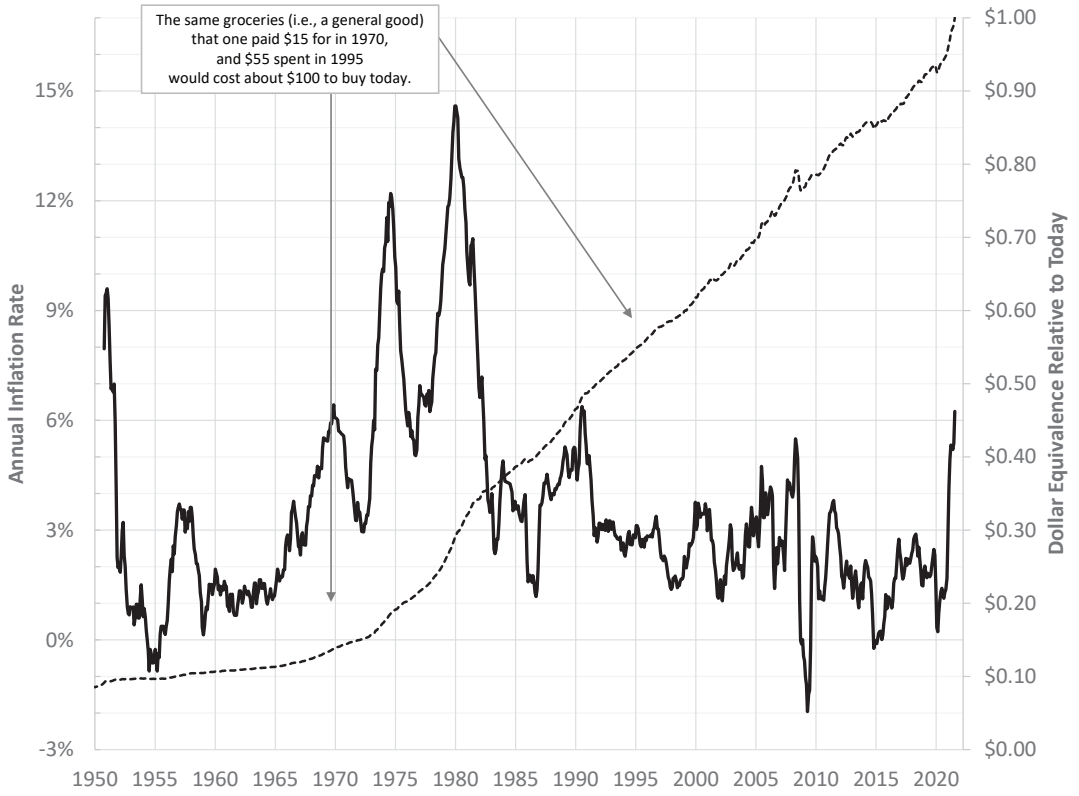
Source: Calculations from CPI data

Figure 8.2: Consumer Price Index (CPI) Decade to 2021 Comparison



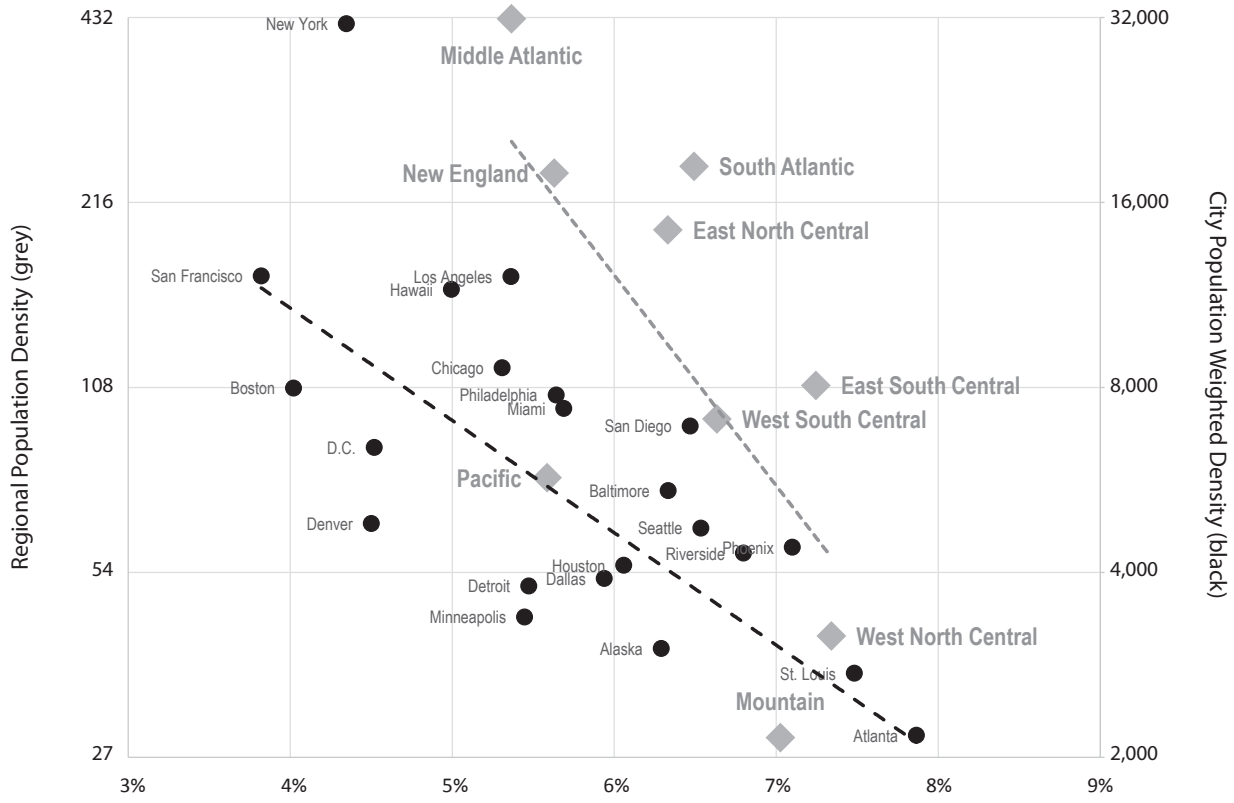
Source: Calculations from CPI data

Figure 8.3: Consumer Price Index (CPI) Year-over-Year Price Change and Relative Value of a Dollar



Source: Calculations from CPI data

Figure 8.4: Regional Consumer Price Index (CPI) by Population Density



Source: Bureau of Labor Statistics, Consumer Price Index, Regional Resources; Census Bureau, U.S. MSA Distance Profiles

Table 8.1: Consumer Price Index for All Urban Consumers
(1982–1984=100) Not Seasonally Adjusted

Year	January	February	March	April	May	June	July	August	September	October	November	December	Annual	Annual Change
1960	29.3	29.4	29.4	29.5	29.5	29.6	29.6	29.6	29.6	29.8	29.8	29.8	29.6	-
1961	29.8	29.8	29.8	29.8	29.8	29.8	30.0	29.9	30.0	30.0	30.0	30.0	29.9	1.0%
1962	30.0	30.1	30.1	30.2	30.2	30.2	30.3	30.3	30.4	30.4	30.4	30.4	30.2	1.0%
1963	30.4	30.4	30.5	30.5	30.5	30.6	30.7	30.7	30.7	30.8	30.8	30.9	30.6	1.3%
1964	30.9	30.9	30.9	30.9	30.9	31.0	31.1	31.0	31.1	31.1	31.2	31.2	31.0	1.3%
1965	31.2	31.2	31.3	31.4	31.4	31.6	31.6	31.6	31.6	31.7	31.7	31.8	31.5	1.6%
1966	31.8	32.0	32.1	32.3	32.3	32.4	32.5	32.7	32.7	32.9	32.9	32.9	32.4	2.9%
1967	32.9	32.9	33.0	33.1	33.2	33.3	33.4	33.5	33.6	33.7	33.8	33.9	33.4	3.1%
1968	34.1	34.2	34.3	34.4	34.5	34.7	34.9	35.0	35.1	35.3	35.4	35.5	34.8	4.2%
1969	35.6	35.8	36.1	36.3	36.4	36.6	36.8	37.0	37.1	37.3	37.5	37.7	36.7	5.5%
1970	37.8	38.0	38.2	38.5	38.6	38.8	39.0	39.0	39.2	39.4	39.6	39.8	38.8	5.7%
1971	39.8	39.9	40.0	40.1	40.3	40.6	40.7	40.8	40.8	40.9	40.9	41.1	40.5	4.4%
1972	41.1	41.3	41.4	41.5	41.6	41.7	41.9	42.0	42.1	42.3	42.4	42.5	41.8	3.2%
1973	42.6	42.9	43.3	43.6	43.9	44.2	44.3	45.1	45.2	45.6	45.9	46.2	44.4	6.2%
1974	46.6	47.2	47.8	48.0	48.6	49.0	49.4	50.0	50.6	51.1	51.5	51.9	49.3	11.0%
1975	52.1	52.5	52.7	52.9	53.2	53.6	54.2	54.3	54.6	54.9	55.3	55.5	53.8	9.1%
1976	55.6	55.8	55.9	56.1	56.5	56.8	57.1	57.4	57.6	57.9	58.0	58.2	56.9	5.8%
1977	58.5	59.1	59.5	60.0	60.3	60.7	61.0	61.2	61.4	61.6	61.9	62.1	60.6	6.5%
1978	62.5	62.9	63.4	63.9	64.5	65.2	65.7	66.0	66.5	67.1	67.4	67.7	65.2	7.6%
1979	68.3	69.1	69.8	70.6	71.5	72.3	73.1	73.8	74.6	75.2	75.9	76.7	72.6	11.3%
1980	77.8	78.9	80.1	81.0	81.8	82.7	82.7	83.3	84.0	84.8	85.5	86.3	82.4	13.5%
1981	87.0	87.9	88.5	89.1	89.8	90.6	91.6	92.3	93.2	93.4	93.7	94.0	90.9	10.3%
1982	94.3	94.6	94.5	94.9	95.8	97.0	97.5	97.7	97.9	98.2	98.0	97.6	96.5	6.2%
1983	97.8	97.9	97.9	98.6	99.2	99.5	99.9	100.2	100.7	101.0	101.2	101.3	99.6	3.2%
1984	101.9	102.4	102.6	103.1	103.4	103.7	104.1	104.5	105.0	105.3	105.3	105.3	103.9	4.3%
1985	105.5	106.0	106.4	106.9	107.3	107.6	107.8	108.0	108.3	108.7	109.0	109.3	107.6	3.6%
1986	109.6	109.3	108.8	108.6	108.9	109.5	109.5	109.7	110.2	110.3	110.4	110.5	109.6	1.9%
1987	111.2	111.6	112.1	112.7	113.1	113.5	113.8	114.4	115.0	115.3	115.4	115.4	113.6	3.6%
1988	115.7	116.0	116.5	117.1	117.5	118.0	118.5	119.0	119.8	120.2	120.3	120.5	118.3	4.1%
1989	121.1	121.6	122.3	123.1	123.8	124.1	124.4	124.6	125.0	125.6	125.9	126.1	124.0	4.8%
1990	127.4	128.0	128.7	128.9	129.2	129.9	130.4	131.6	132.7	133.5	133.8	133.8	130.7	5.4%
1991	134.6	134.8	135.0	135.2	135.6	136.0	136.2	136.6	137.2	137.4	137.8	137.9	136.2	4.2%
1992	138.1	138.6	139.3	139.5	139.7	140.2	140.5	140.9	141.3	141.8	142.0	141.9	140.3	3.0%
1993	142.6	143.1	143.6	144.0	144.2	144.4	144.4	144.8	145.1	145.7	145.8	145.8	144.5	3.0%
1994	146.2	146.7	147.2	147.4	147.5	148.0	148.4	149.0	149.4	149.5	149.7	149.7	148.2	2.6%
1995	150.3	150.9	151.4	151.9	152.2	152.5	152.5	152.9	153.2	153.7	153.6	153.5	152.4	2.8%
1996	154.4	154.9	155.7	156.3	156.6	156.7	157.0	157.3	157.8	158.3	158.6	158.6	156.9	3.0%
1997	159.1	159.6	160.0	160.2	160.1	160.3	160.5	160.8	161.2	161.6	161.5	161.3	160.5	2.3%
1998	161.6	161.9	162.2	162.5	162.8	163.0	163.2	163.4	163.6	164.0	164.0	163.9	163.0	1.6%
1999	164.3	164.5	165.0	166.2	166.2	166.2	166.7	167.1	167.9	168.2	168.3	168.3	166.6	2.2%
2000	168.8	169.8	171.2	171.3	171.5	172.4	172.8	172.8	173.7	174.0	174.1	174.0	172.2	3.4%
2001	175.1	175.8	176.2	176.9	177.7	178.0	177.5	177.5	178.3	177.7	177.4	176.7	177.1	2.8%
2002	177.1	177.8	178.8	179.8	179.8	179.9	180.1	180.7	181.0	181.3	181.3	180.9	179.9	1.6%
2003	181.7	183.1	184.2	183.8	183.5	183.7	183.9	184.6	185.2	185.0	184.5	184.3	184.0	2.3%
2004	185.2	186.2	187.4	188.0	189.1	189.7	189.4	189.5	189.9	190.9	191.0	190.3	188.9	2.7%
2005	190.7	191.8	193.3	194.6	194.4	194.5	195.4	196.4	198.8	199.2	197.6	196.8	195.3	3.4%
2006	198.3	198.7	199.8	201.5	202.5	202.9	203.5	203.9	202.9	201.8	201.5	201.8	201.6	3.2%
2007	202.4	203.5	205.4	206.7	207.9	208.4	208.3	207.9	208.5	208.9	210.2	210.0	207.3	2.8%
2008	211.1	211.7	213.5	214.8	216.6	218.8	220.0	219.1	218.8	216.6	212.4	210.2	215.3	3.8%

Table 8.1: *Continued*

Year	January	February	March	April	May	June	July	August	September	October	November	December	Annual	Annual Change
2009	211.1	212.2	212.7	213.2	213.9	215.7	215.4	215.8	216.0	216.2	216.3	215.9	214.5	-0.4%
2010	216.7	216.7	217.6	218.0	218.2	218.0	218.0	218.3	218.4	218.7	218.8	219.2	218.1	1.6%
2011	220.2	221.3	223.5	224.9	226.0	225.7	225.9	226.5	226.9	226.4	226.2	225.7	224.9	3.2%
2012	226.7	227.7	229.4	230.1	229.8	229.5	229.1	230.4	231.4	231.3	230.2	229.6	229.6	2.1%
2013	230.3	232.2	232.8	232.5	232.9	233.5	233.6	233.9	234.1	233.5	233.1	233.0	233.0	1.5%
2014	233.9	234.8	236.3	237.1	237.9	238.3	238.3	237.9	238.0	237.4	236.2	234.8	236.7	1.6%
2015	233.7	234.7	236.1	236.6	237.8	238.6	238.7	238.3	237.9	237.8	237.3	236.5	237.0	0.1%
2016	236.9	237.1	238.1	239.3	240.2	241.0	240.6	240.8	241.4	241.7	241.4	241.4	240.0	1.3%
2017	242.8	243.6	243.8	244.5	244.7	245.0	244.8	245.5	246.8	246.7	246.7	246.5	245.1	2.1%
2018	247.9	249.0	249.6	250.5	251.6	252.0	252.0	252.1	252.4	252.9	252.0	251.2	251.1	2.4%
2019	251.7	252.8	254.2	255.5	256.1	256.1	256.6	256.6	256.8	257.3	257.2	257.0	255.7	1.8%
2020	258.0	258.7	258.1	256.4	256.4	257.8	259.1	259.9	260.3	260.4	260.2	260.5	258.8	1.2%
2021	261.6	263.0	264.9	267.1	269.2	271.7	273.0	273.6	274.3	276.6				

Source: U.S. Bureau of Labor Statistics

Table 8.2: Regional Price Parities by State, 2019

State	All items	Goods	Services	
			Rents	Other
Alabama	85.8	95.9	61.9	90.3
Alaska	105.1	102.3	122.3	99.1
Arizona	96.3	94.8	94.1	99.7
Arkansas	84.7	94.7	60.9	91.0
California	116.4	104.9	153.6	108.3
Colorado	101.9	97.1	124.7	96.0
Connecticut	105.0	102.4	107.6	106.2
Delaware	99.4	98.3	95.0	103.6
District of Columbia	115.2	105.2	146.4	106.5
Florida	101.0	97.8	109.4	99.0
Georgia	93.2	96.8	82.6	96.7
Hawaii	119.3	111.8	152.6	105.0
Idaho	92.2	96.2	80.6	95.8
Illinois	97.4	99.0	94.7	97.4
Indiana	88.7	96.1	72.8	91.8
Iowa	89.0	94.9	73.0	91.6
Kansas	89.2	95.1	72.7	93.1
Kentucky	87.4	94.8	67.7	90.6
Louisiana	87.9	95.8	72.1	91.0
Maine	99.3	99.4	91.7	103.6
Maryland	107.7	102.4	119.3	104.8
Massachusetts	110.4	102.9	124.3	109.2
Michigan	92.3	96.9	80.2	94.7
Minnesota	98.0	101.7	96.1	95.3
Mississippi	84.4	94.4	60.0	90.3
Missouri	88.7	95.5	72.4	91.7
Montana	93.5	97.0	85.3	94.4
Nebraska	89.5	94.9	75.6	91.6
Nevada	97.4	93.9	101.8	98.5
New Hampshire	106.5	101.4	113.9	107.1
New Jersey	116.0	103.6	130.7	117.6
New Mexico	91.1	94.8	78.1	97.4
New York	116.3	108.2	130.0	115.2
North Carolina	91.7	95.8	78.8	94.9
North Dakota	89.3	94.9	75.2	91.6
Ohio	88.4	95.8	71.7	91.5
Oklahoma	87.2	95.2	68.6	91.1
Oregon	102.2	101.8	109.7	98.2
Pennsylvania	97.0	99.7	86.8	100.3
Rhode Island	101.3	99.4	101.2	103.5
South Carolina	91.5	96.0	78.2	94.9
South Dakota	87.8	94.8	69.0	91.5
Tennessee	89.7	95.9	76.8	90.3
Texas	96.5	96.7	94.9	97.4
Utah	96.5	94.5	98.2	97.8
Vermont	103.1	99.3	109.8	103.4
Virginia	101.3	98.9	107.4	100.1
Washington	108.4	105.8	122.9	103.0
West Virginia	87.1	94.6	60.9	96.0
Wisconsin	91.9	96.2	83.7	92.3
Wyoming	92.8	96.7	82.4	94.8

Source: U.S. Bureau of Economic Analysis

Consumer Confidence

9

Michael Hogue, Kem C. Gardner Policy Institute
Dianne Meppen, Kem C. Gardner Policy Institute

2021 OVERVIEW

United States

Consumer confidence is an important signal for economic expectations, with consumer expenditures accounting for over two-thirds of economic activity. When sentiment is high, we can expect increased expenditures that fuel economic growth. When sentiment is low, we anticipate a decline in spending and a drag on economic growth.

2021 began with increasing U.S. consumer optimism, as measured by the University of Michigan's Index of Consumer Sentiment, after a year of hard knocks in 2020. The index rose from a 10-year low of 71.8 in April 2020 to 79.0 by January 2021. With the increasing availability of COVID-19 vaccinations, the index reached 88.3 in April 2021. That trend reversed as the U.S. watched the virus's Delta variant peak abroad over the spring and then spread through the country over the summer. The decline of Delta's dominance was not enough to offset increasing concerns about inflation and the spread of the new Omicron variant, and the index dropped to 67.4 in November.

The declines in confidence in the latter part of 2021 led to an average index of 77.5, lower than 2020's 81.5 and 2019's pre-pandemic 96.0.

Utah

Utah's economic stakeholders now have access to a localized reading of consumer confidence, with the Kem C. Gardner Policy Institute measuring Utah consumer sentiment beginning in October 2020.

While Utahns are more optimistic overall about the Utah economy, the Utah Consumer Confidence index trend closely mirrors the movement of the Michigan index for the U.S. The Utah index rose from 89.4 in January to 96.4 in March. The same news that pushed the U.S. index down pushed Utah's index to 76.9 in November.

Like Michigan's index for the U.S., the Utah Consumer Confidence Index reflects consumer opinions on five topics: current family financial situation relative to one year ago, expected future change in family financial situation, business conditions expected during the following year, business conditions expected over the next five years, and current buying conditions for large household goods.

Growing pains associated with Utah's relative economic strength were apparent in more pessimism about buying conditions (i.e., inflation) in 2021, but this was not enough to offset Utahn's relative optimism about business conditions in Utah. This optimism is largely responsible for the difference in Utah's overall average index of 87.5 and the U.S.'s overall average index of 77.5. Utahns' assessment of their current and future personal financial situation was similar to their counterparts in the U.S. survey in 2021.

2022 OUTLOOK

Preliminary December 2021 data suggest that confidence bottomed out in November. Inflation and COVID-19 will continue to loom large for consumer confidence in 2022. All going well, expectations around an end to the COVID-19 pandemic, with the disease becoming endemic, and softening inflation should underpin a steady improvement in consumer confidence in Utah and the U.S.

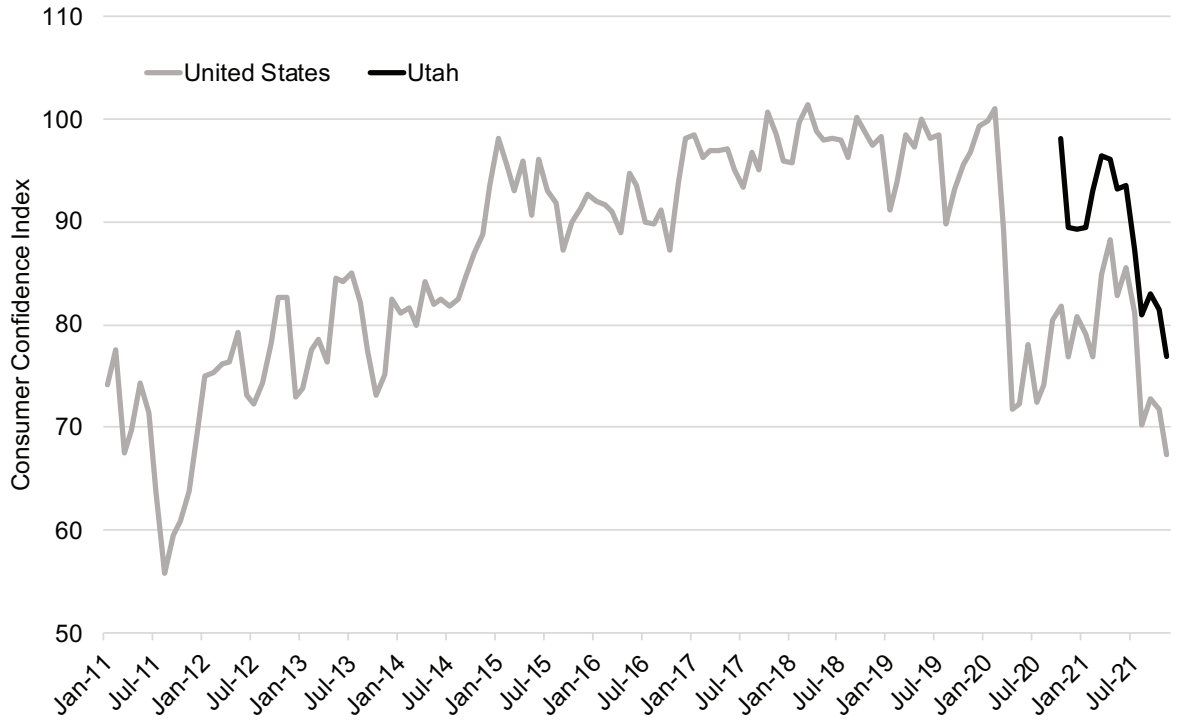
About the Utah Consumer Confidence Survey

The Utah Consumer Confidence Survey uses key questions from the University of Michigan's Survey of Consumers. These questions measure residents' views of the present economic situation and their expectations for the economy in the future. Data gathered from the key questions are used to create the consumer confidence index for Utah. Demographic questions are included on the

questionnaire to allow for additional analysis of the data and assess the sample's representativeness.

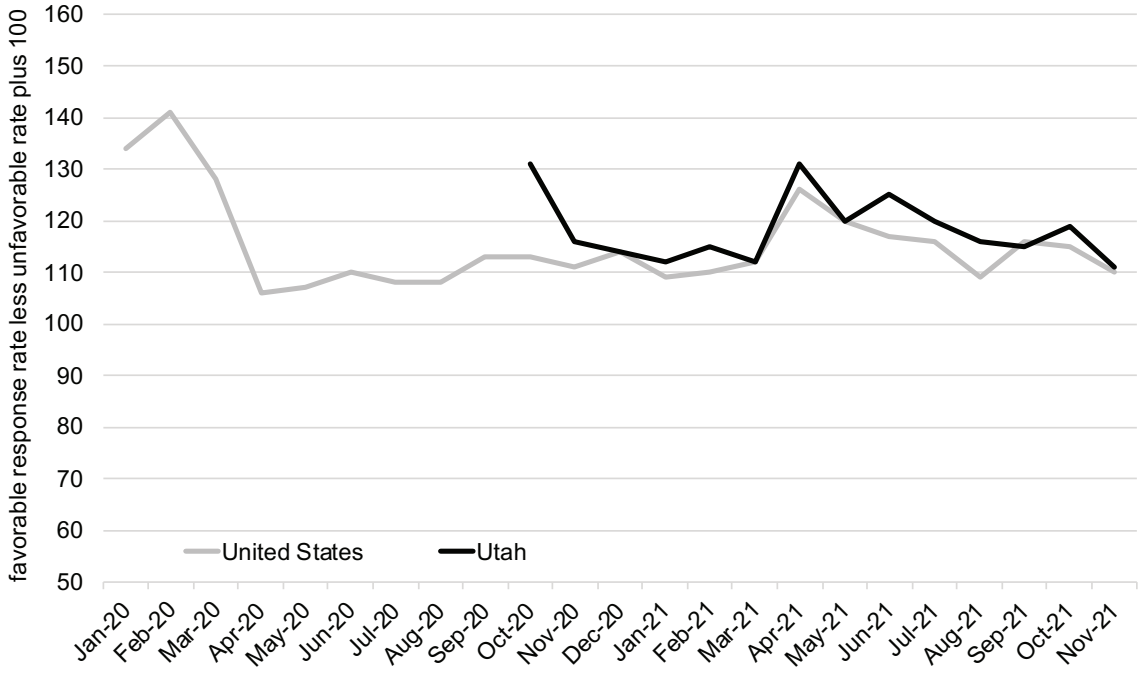
The 405-interview sample yields a +/- 5.0% tolerated error on total data. All survey interviews are conducted by telephone by a professional data collection company. The sample is drawn to be proportional to the population of Utah's 29 counties. Demographic data may be used for weighting to ensure the sample more closely aligns with Census data for Utah adult residents.

Figure 9.1: Overall Monthly Utah and U.S. Consumer Confidence



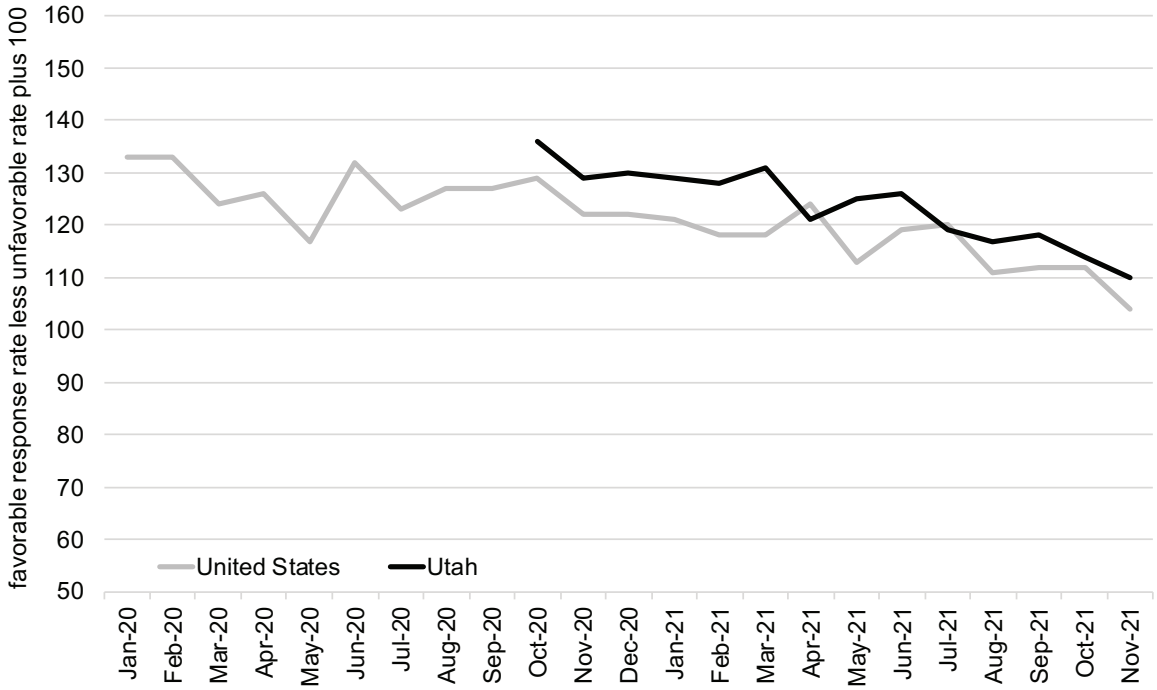
Source: University of Michigan surveys of consumers and Kem C. Gardner Policy Institute

Figure 9.2: Components of Monthly Utah and U.S. Consumer Confidence: Current Family Financial Situation Compared with a Year Ago



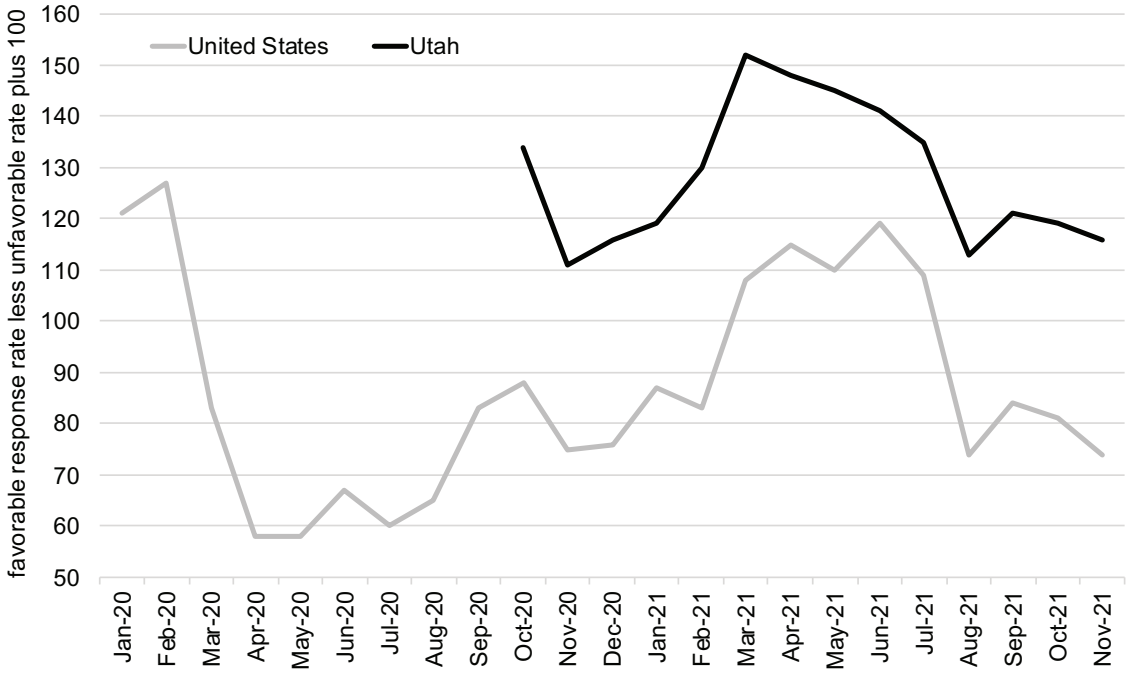
Source: University of Michigan surveys of consumers and Kem C. Gardner Policy Institute

Figure 9.3: Components of Monthly Utah and U.S. Consumer Confidence: Expected Family Financial Situation Change in a Year



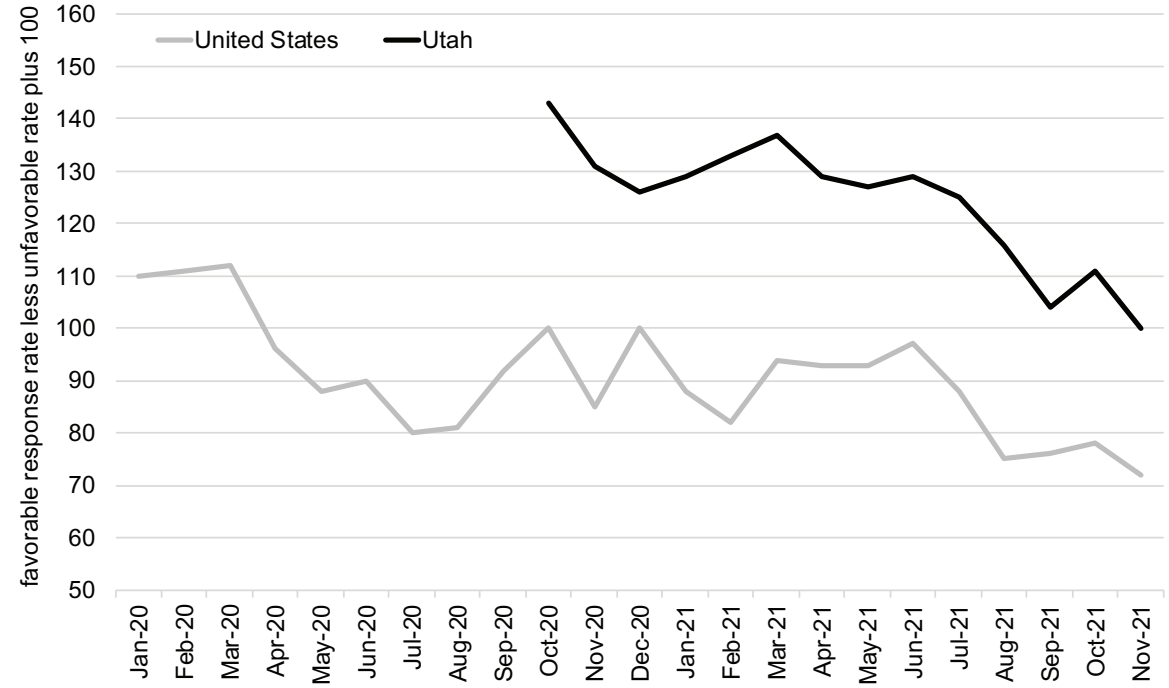
Source: University of Michigan surveys of consumers and Kem C. Gardner Policy Institute

Figure 9.4: Components of Monthly Utah and U.S. Consumer Confidence: Business Conditions Expected During the Next Year



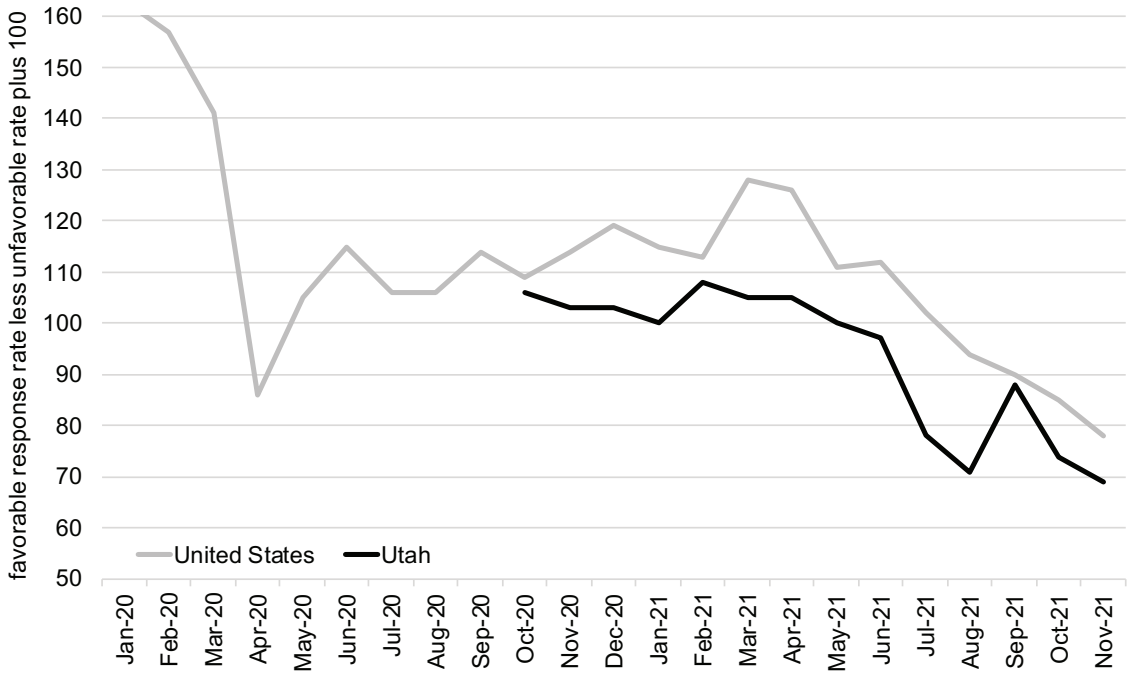
Source: University of Michigan surveys of consumers and Kem C. Gardner Policy Institute

Figure 9.5: Components of Monthly Utah and U.S. Consumer Confidence: Business Conditions Expected During the Next Five Years



Source: University of Michigan surveys of consumers and Kem C. Gardner Policy Institute

Figure 9.6: Components of Monthly Utah and U.S. Consumer Confidence: Current Buying Conditions for Large Household Goods



Source: University of Michigan surveys of consumers and Kem C. Gardner Policy Institute

Table 9.1: Consumer Confidence in the United States and Utah

	Q1 19	Q2 19	Q3 19	Q4 19	Q1 20	Q2 20	Q3 20	Q4 20	Q1 21	Q2 21	Q3 21	Q4 21	2019	2020	2021(e)	
University of Michigan Surveys of Consumers, Components																
Current Family Financial Situation Compared with a Year Ago	129.7	132.7	129.7	135.0	134.3	107.7	109.7	112.7	110.3	121.0	113.7	112.5	131.8	116.1	114.4	-3.2
Expected Change in Family Financial Situation in a Year	131.7	135.0	129.3	132.0	130.0	125.0	125.7	124.3	119.0	118.7	114.3	108.0	132.0	126.3	115.0	-5.8
Business Conditions Expected During the Next Year	108.0	122.0	111.7	114.7	110.3	61.0	69.3	79.7	92.7	114.7	89.0	77.5	114.1	80.1	93.5	
Business Conditions Expected During the Next 5 Years	99.3	105.3	99.0	102.3	111.0	91.3	84.3	95.0	88.0	94.3	79.7	75.0	101.5	95.4	84.3	
Buying Conditions for Large Household Goods	156.3	156.7	150.7	160.0	153.7	102.0	108.7	114.0	118.7	116.3	95.3	81.5	155.9	119.6	103.0	
Overall Consumer Confidence Index for the U.S.*	94.5	98.5	93.8	97.2	96.6	74.1	75.7	79.8	80.2	85.6	74.8	69.6	96.0	81.5	77.5	
Kem C. Gardner Policy Institute Utah Consumer Confidence Survey, Components																
Current Family Financial Situation Compared with a Year Ago	-	-	-	-	-	-	-	120.3	113.0	125.3	117.0	115.0	-	-	117.6	
Expected Change in Financial Situation in a Year	-	-	-	-	-	-	-	131.7	129.3	124.0	118.0	112.0	-	-	120.8	
Utah Business Conditions Expected During the Next Year	-	-	-	-	-	-	-	120.3	133.7	144.7	123.0	117.5	-	-	129.7	
Utah Business Conditions Expected During the Next 5 Years	-	-	-	-	-	-	-	133.3	133.0	128.3	115.0	105.5	-	-	120.5	
U.S. Business Conditions Expected During the Next Year	-	-	-	-	-	-	-	104.0	104.3	100.7	79.0	71.5	-	-	88.9	
U.S. Business Conditions Expected During the Next 5 Years	-	-	-	-	-	-	-	83.3	93.0	95.7	74.3	68.0	-	-	82.8	
Buying Conditions for Large Household Goods	-	-	-	-	-	-	-	95.0	86.3	76.7	67.7	61.5	-	-	73.0	
Overall Consumer Confidence Index for Utah	-	-	-	-	-	-	-	92.3	92.9	94.3	83.7	79.2	-	-	87.5	
Overall Consumer Confidence Index for the U.S.*	-	-	-	-	-	-	-	81.1	80.0	79.3	69.6	65.4	-	-	73.6	

*The Michigan and Gardner overall indices for the U.S. are not directly comparable.
Notes: The Kem C. Gardner Policy Institute Utah Consumer Confidence Survey commenced in October, 2020. Component measures reflect the difference in favorable and unfavorable response rates plus 100.
Sources: University of Michigan Surveys of Consumers and Kem C. Gardner Policy Insitute

Social Indicators

10

Peter Reichard, Utah Foundation
Shawn Teigen, Utah Foundation
Christopher Collard, Utah Foundation

OVERVIEW

Social indicators provide insights into dimensions of Utah life that are "noneconomic" in nature, but may impact the economy. This chapter includes information on social indicators from the Utah Foundation's Social Capital series, which began release in September 2021 and continues into 2022.

Social Capital

Social capital affects a wide variety of public policy and economic concerns. Low social capital levels often lead to poor economic and social outcomes, both for individuals and for populations. Policymakers seek to ameliorate these poor outcomes through endeavors that span educational efforts, election reforms, public assistance programs, and law enforcement interventions. As social capital declines, the challenges become more acute—and social scientists across the political spectrum affirm that social capital in the U.S. is in long-term decline. In places where social capital is comparatively robust, however, it can translate into heightened economic prospects and lower demands on the public sector.

Despite the importance of social capital, public attention to the factors affecting social capital may receive inadequate attention from the public and policymakers. This is because social capital is less intuitive to understand from an economic and public policy perspective. It is the bonds between people and among networks, which they can use to benefit themselves and the group as a whole.

Social capital takes many forms. With its Social Capital series, the Utah Foundation seeks to be comprehensive, gathering data on roughly 30 metrics. These metrics are sorted into seven categories: (1) civic engagement; (2) social trust; (3) community life; (4) family health; (5) social cohesion; (6) future focus; and (7) social mobility.

This chapter briefly covers a sampling of metrics from each category, with comparisons to Utah's neighboring Mountain States and the national average.

Civic Engagement: Participation in Public Meetings

The measures related to civic engagement in Utah reveal both positive and negative outcomes. The state is currently experiencing increased voter turnout, but the relatively small number of advocacy organizations in Utah merits closer study to determine both the underlying reasons and the implications for civic life and social capital. The main bright spot, however, is participation in public meetings. In recent years, the state has far outperformed the nation at large on this count. In fact, only Vermont and Maine outperformed Utah in 2019. While other Mountain States like Colorado, Montana, and Wyoming have robust meeting participation as well, Utah leads the region.

Social Trust: Public Corruption Convictions

Successful social interactions depend on trust. Social trust has major implications for the prosperity of an economy, the health of a democracy, the strength of social fabric, and the support of strong social capital. Utah compares favorably on multiple indicators related to social trust, including the level of convictions for fraud, penalties for breach of trust, public corruption convictions, and violent crime rates. Utah stands out in particular on two measures. When it comes to federal corruption convictions, Utah performed second best in the nation, behind only Wyoming. And, Utah outperforms the entire nation in terms of breach of trust penalties. It should be noted that comparing state level convictions will highlight variances related to different laws, policies, and other practices, and not necessarily fully capture differential crime rates.

Participation in Community Life: Neighborhoods

For the purposes of this research, the Utah Foundation defines participation in community life as the ways in which people participate in and financially support non-governmental community endeavors. Six metrics are used in the analysis: (1) charitable donations; (2) volunteering; (3) attendance at religious services; (4) participation in neighborhood groups; (5) the number of non-professional organizations; and (6) the number of professional organizations. Utah tops the nation on multiple measures. However, when it comes to neighborhood participation, not only does Utah rank first, but no other state in the nation comes close to its level.

Family Health: Reading to Children

Family is the basic building block of society and a core component of social capital. To the extent that families are stable, the more the larger civilization benefits from this greater stability. To the extent that family connections are strong, the more the members of that family tend to enjoy stronger social capital and related socio-economic benefits.

The Utah Foundation's series explores a variety of metrics related to marriage, children, and family activities. Despite Utah's outstanding performance on family formation and structure, the Beehive State performs poorly on family activities and is trending in the wrong direction on related measures. For example, Utah is among the bottom 10 states nationally, with both Nevada and Arizona, when it comes to reading to young children. Reading to children has declined rapidly in Utah.

Social Cohesion: A Strong Middle Class

For the purposes of this research, the Utah Foundation defines social cohesion as the commonalities that allow a population to function effectively as a group and open the way for individuals to participate in that whole. The issue is examined through three lenses: (1) class; (2) language; and (3) the extent to which the population is homegrown. One remarkable finding is that Utah has the largest proportion of middle-class households in the U.S. Utah consistently outperforms the nation at large in this respect; it is joined in the top three states by neighboring Idaho and Wyoming.

Focus on the Future: Education Funding Effort

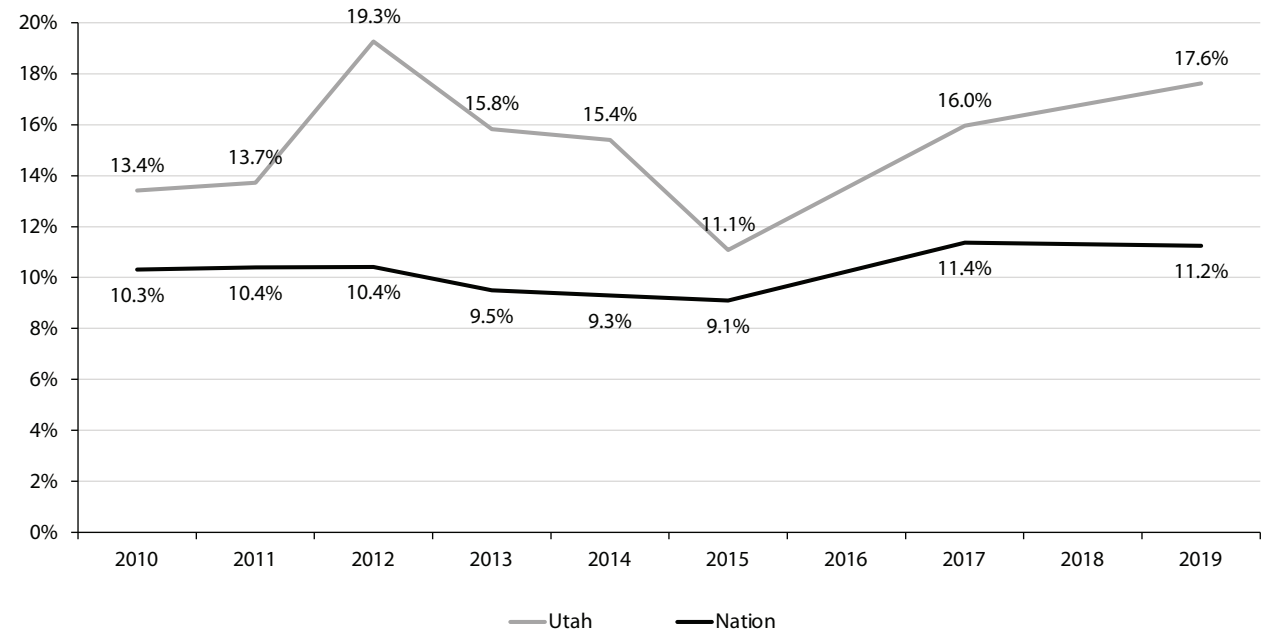
The extent to which a society attends to the needs of its children says much about its efforts to build social capital into the future. If children are neglected, a "family withers on the vine"—and the same can be said about a society more generally. The Utah Foundation measures the state's future focus on social capital by looking at investments in recreation and public schools, among other metrics. While Utah's investments in recreation are relatively strong among the Mountain States, only Wyoming stands out as making a high relative investment in K-12 public education.

While Utah ranked fourth among the Mountain States for spending on K-12 public education per $1,000 of personal income, the Mountain States region as a whole exhibits a relatively lower education spending effort. Four of the eight states in the region were in the bottom 10 in the nation with Arizona ranking last. All eight states have experienced a decrease in spending effort over time.

Social Mobility: Homeownership

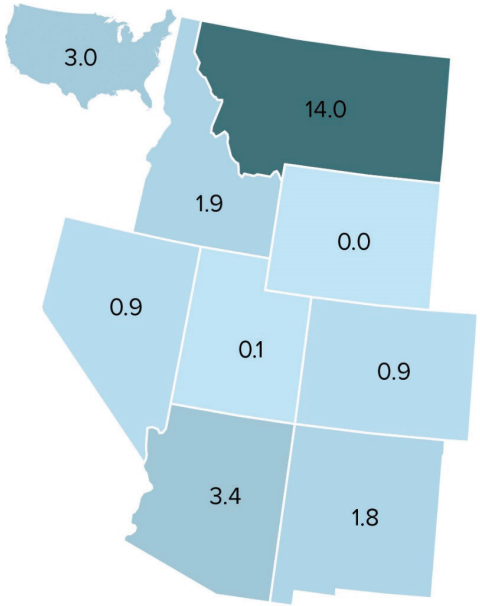
A high degree of social mobility both reflects and reinforces social capital. But if people perceive that a place does not offer these possibilities, people are likely to lose faith, become alienated from social structures, or break away to seek other opportunities. In addition, some economists argue there is a strong correlation between low social mobility and high levels of economic stratification, which reduces social capital. The Utah Foundation examines social mobility using four metrics: (1) post-secondary attainment; (2) homeownership levels; (3) youth engagement; and (4) the extent to which people are earning more than their parents did. Homeownership is a particular strong point for Utah. The Beehive State outperforms all of the other seven Mountain States and ranks sixth nationally on this metric.

Figure 10.1: Share of Population Participating in a Public Meeting in the Previous 12 months, 2019



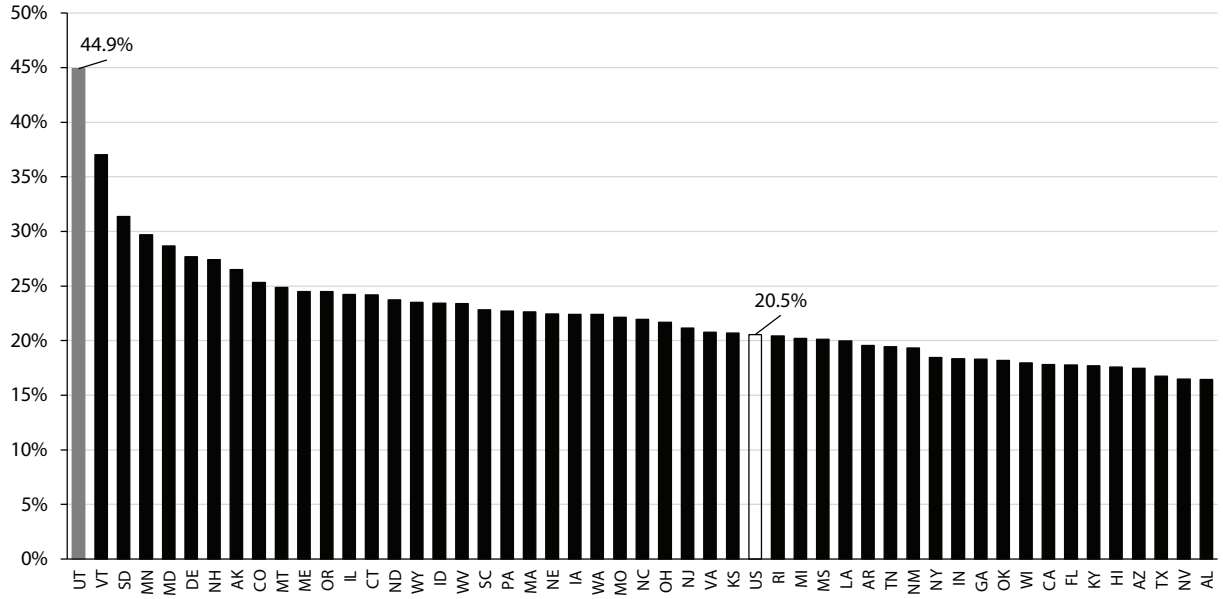
Source: U.S. Census Bureau, Volunteering and Civic Life.

Figure 10.2: Federal Corruption Convictions, Three-Year Average, 2017–2019
(Rate per One Million Individuals)



Source: Department of Justice, "Report to Congress on the Activities and Operations of the Public Integrity Section for 2019."

Figure 10.3: Share of Adults Who Report Participating in Neighborhood Projects in the Previous 12 Months, 2019



Source: U.S. Census Bureau, Volunteering and Civic Life.

Table 10.1: Social Capital Indicators

	Share of Population Participating in a Public Meeting in the Previous 12 months, 2019	Federal Corruption Convictions, Three-Year Average, 2017–2019	Share of Adults Who Report Participating in Neighborhood Projects in the Previous 12 Months, 2019	Share of Children Read to Every Day, 2019	Share of Households in Middle-Class, 2019	State & Local Public School Education Spending per $1,000 of Personal Income, 2018	Share of Population Age 25 Years or Older with a Bachelor's Degree or Higher, 2019
	Percent	Rate per One Million Individuals	Percent	Percent	Percent	Dollars	Percent
Utah	17.6	0.1	44.9	9.3	54.5	38.2	34.8
Arizona	9.2	3.4	17.5	8.7	48.5	27.6	30.2
Colorado	15.3	0.9	25.3	13.9	48.7	34.0	42.7
Idaho	11.2	1.9	23.4	10.1	51.6	31.3	28.7
Montana	13.2	14.2	24.9	12.8	49.0	40.3	33.6
Nevada	7.6	0.9	16.5	8.4	49.5	32.9	25.7
New Mexico	11.5	1.8	19.3	11.3	44.1	41.8	27.7
Wyoming	15.9	0.0	23.5	11.8	52.5	50.9	29.1
National avg.	11.2	3.0	20.5	11.0	46.6	39.6	33.1

Note: Middle class is defined as households that earn between two-thirds and twice the median income.
Sources:

Share of Population Participating in a Public Meeting in the Previous 12 months, 2019
- U.S. Census Bureau, "Volunteering and Civic Life." Available from www.census.gov/data/datasets/time-series/demo/cps/cps-supp_cps-repwgt/cps-volunteer.html.

Federal Corruption Convictions, Three-Year Average 2017–2019
- Department of Justice, "Report to Congress on the Activities and Operations of the Public Integrity Section for 2019."

Share of Adults Who Report Participating in Neighborhood Projects in Previous 12 Months 2019
- U.S. Census Bureau, "Volunteering and Civic Life." Available from www.census.gov/data/datasets/time-series/demo/cps/cps-supp_cps-repwgt/cps-volunteer.html.

Share of Children Read to Every Day 2019
- U.S. Census Bureau, "National Survey of Children's Health (NSCH)."
- Available from https://www.census.gov/programs-surveys/nsch/data/datasets.2019.html.

Share of Households in Middle-Class 2019
- U.S. Census Bureau, "Public Use Microdata Sample."
- Available from https://data.census.gov/mdat/#/.

State & Local Public School Education Spending per $1,000 of Personal Income 2018
- U.S. Census Bureau, "2018 State & Local Government Finance Historical Datasets and Tables."
- Available from https://www.census.gov/data/datasets/2018/econ/local/public-use-datasets.html.
- Bureau of Economic Analysis, 2020, "Personal Income, Population, Per Capita Personal Income (SQINC1)." Available from https://bea.gov/.

Share of Population Age 25 Years or Older with a Bachelor's Degree or Higher 2019
- U.S. Census Bureau, "Educational Attainment for the Population 25 Years and Over."
- Available from https://data.census.gov/cedsci/table?tid=ACSDT1Y2019.B15003.

Measuring Economic Diversity

11

John C. Downen, Kem C. Gardner Policy Institute

OVERVIEW

The Hachman Index measures economic diversity. Using indicators such as gross domestic product (GDP) or employment, the index measures the mix of industries present in a particular region relative to a (well-diversified) reference region. Hachman Index scores are normalized from 0 to 100. A higher score indicates more economic diversity, while a lower score indicates less economic diversity. The Hachman Index is often applied at the national level, allowing for comparison between individual states. With reliable data, the index may also be applied to measure industrial distribution across counties. This chapter examines the results of a Hachman Index analysis at the state and county levels for 2020.

The Pandemic Reshuffles Economic Diversity

The COVID-19 pandemic affected states' economic diversity. Variation in relative concentrations of highly impacted industries (e.g. arts, entertainment and recreation, and accommodation and food services) and differences in how states' economies responded to the pandemic and the resulting national, state and local policies led to a reshuffling of Hachman Index scores. Utah fell from the most economically diverse state in the U.S. in 2019 to sixth, with Missouri taking the top spot and Pennsylvania edging into the top five. Utah's score dropped from 97.3 to 96.5, behind Missouri (97.4), Georgia (97.1), Illinois (96.3), Arizona (95.9), and Pennsylvania (95.52 vs. Utah's 95.47) (see Figure 1). Overall, seven states (those listed above plus North Carolina) have index scores above 95 (see Table 1). As the Hachman Index is a relative measure, it is not definitive that any one of these states is significantly more diverse than another.[1]

Utah ranks second in the West for industrial diversity. Oregon, Arizona, Colorado, Washington, and California all have larger economies than Utah, but only Arizona has a higher Hachman Index score, and that by less than half a point.[2] States with similar-sized economies include Alabama, Kentucky, Iowa, and Oklahoma.[3] Of these, only Alabama has an index score above 90, indicating a very diverse economy. Alabama scores 91.2, Kentucky 89.8, Iowa 78.7, and Oklahoma the lowest at 70.3. Despite Utah's midsized economy (29th largest), its industrial composition is more diverse than even the largest states.

Urban Counties More Diverse, Rural Counties More Specialized

Salt Lake, Weber, Davis, Utah 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 11.2). Salt Lake and Weber counties are two of the most populous counties in the state.[4] Washington County is the largest county outside of the Wasatch Front, and adjacent Iron County is one of the faster-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.

1 The variation among the top five state scores is 1.8 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, Washington ranks 10th, Colorado ranks 16th, and Arizona ranks 19th. Utah ranks as the 29th largest state economy.

3 When ranking state economies by size using total GDP, Alabama (27th) and Kentucky (28th) rank just larger than Utah, and Iowa (30th) and Oklahoma (31st) rank just smaller.

4 Kem C. Gardner Policy Institute, 2021,"First Insights – 2020 Census Utah Counties and Communities," Fact Sheet, August 2021, available from https://gardner.utah.edu/wp-content/uploads/C2020-Counties-FS-Aug2021.pdf.

5 *Ibid*.

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

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

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

Calculating the Hachman index

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

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

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

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

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

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

Although diversification is usually considered a positive attribute for an economy, an increase in diversity may not be good for the labor market. As discussed in the 1995 *Economic Report to the Governor*, Utah had specialized in metal mining

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 9.8, followed by real estate and rental and leasing (3.2), and accommodation and food services (2.5).

7 Duchesne has the highest mining location quotient of all counties in the state at 40.0, followed by Uintah at 28.5. The next highest are Carbon at 24.5, Emery at 19.3, Sevier at 17.7, and San Juan at 11.7, all well above other counties in the state.

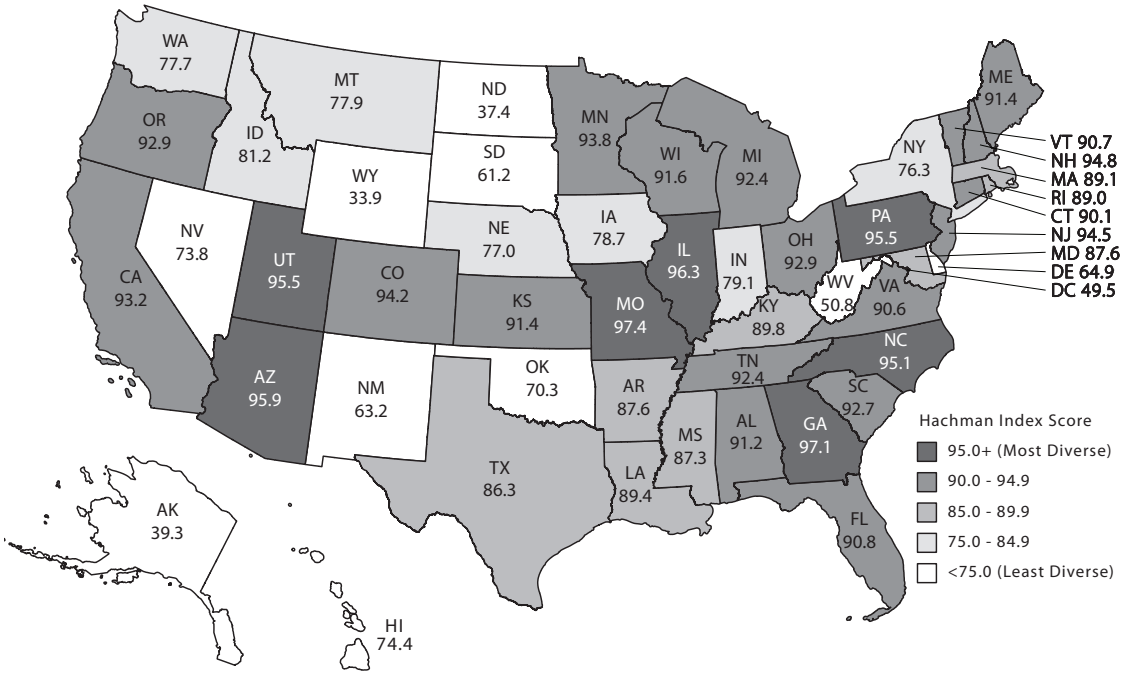
8 A location quotient measures the relative concentration of an industry in one area compared with another. The Bureau of Labor Statistics defines it as a "ratio that compares the concentration of a resource or activity, such as employment, in a defined area to that of a larger area or base. For example,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

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

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 short term effect on the labor market was negative, with lower employment levels. The transition to increased industrial diversity may not immediately result in improvements for residents of a region or imply economic growth.[10]

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

Figure 11.1: Hachman Index for States, 2020



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

Table 11.1: Hachman Index Scores for the States, 2020

State	Hachman Index
Missouri	97.4
Georgia	97.1
Illinois	96.3
Arizona	95.9
Pennsylvania	95.5
Utah	95.5
North Carolina	95.1
New Hampshire	94.8
New Jersey	94.5
Colorado	94.2
Minnesota	93.8
California	93.2
Ohio	92.9

State	Hachman Index
Oregon	92.9
South Carolina	92.7
Tennessee	92.4
Michigan	92.4
Wisconsin	91.6
Kansas	91.4
Maine	91.4
Alabama	91.2
Florida	90.8
Vermont	90.7
Virginia	90.6
Connecticut	90.1
Kentucky	89.8

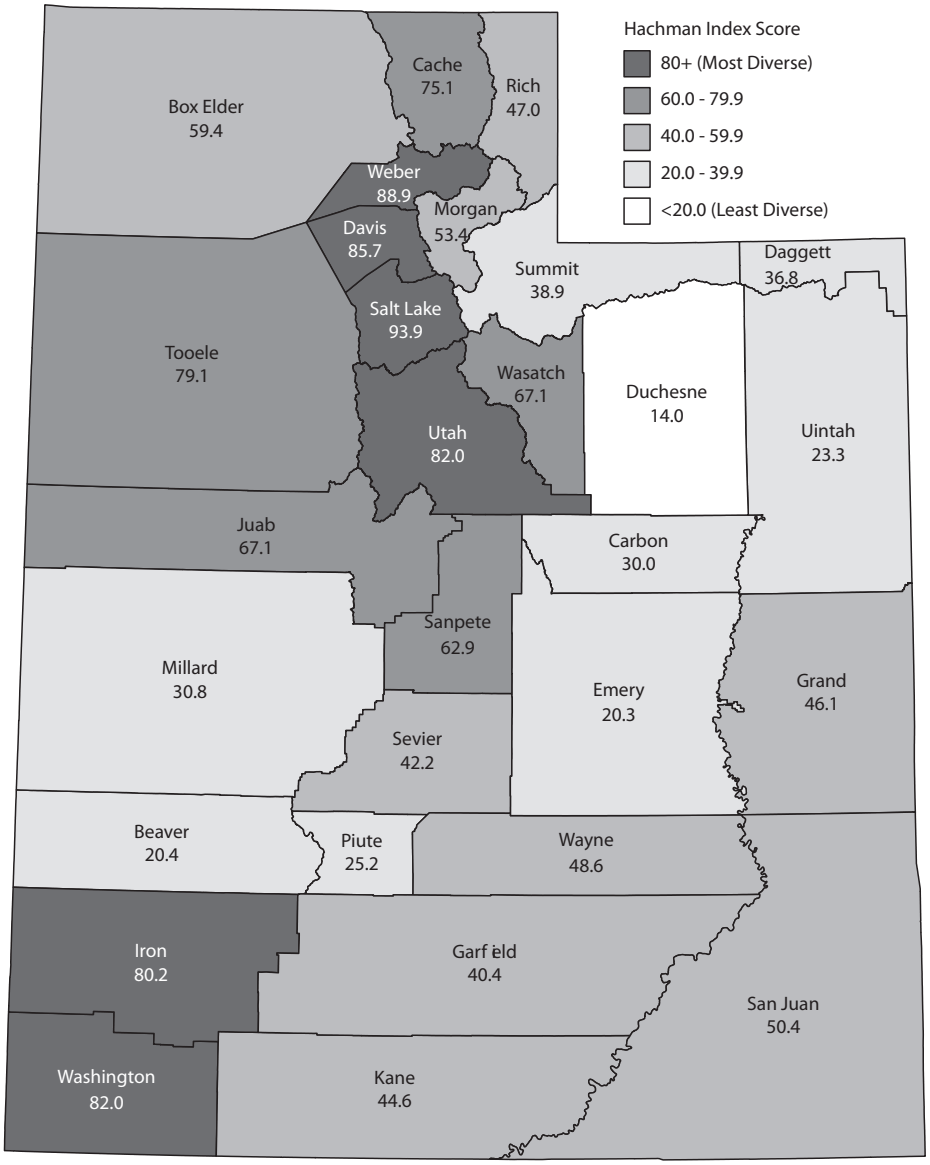
State	Hachman Index
Louisiana	89.4
Massachusetts	89.1
Rhode Island	89.0
Maryland	87.6
Arkansas	87.6
Mississippi	87.3
Texas	86.3
Idaho	81.2
Indiana	79.1
Iowa	78.7
Montana	77.9
Washington	77.7
Nebraska	77.0

State	Hachman Index
New York	76.3
Hawaii	74.4
Nevada	73.8
Oklahoma	70.3
Delaware	64.9
New Mexico	63.2
South Dakota	61.2
West Virginia	50.8
District of Columbia	49.5
Alaska	39.3
North Dakota	37.4
Wyoming	33.9

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

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

Figure 11.2: Hachman Index for Utah Counties, 2020



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

Table 11.2: Hachman Index Scores for Utah Counties, 2020

County	Hachman Index
Salt Lake	93.9
Weber	88.9
Davis	85.7
Utah	81.99
Washington	81.96
Iron	80.2
Tooele	79.1
Cache	75.1

County	Hachman Index
Wasatch	67.14
Juab	67.11
Sanpete	62.9
Box Elder	59.4
Morgan	53.4
San Juan	50.4
Wayne	48.6
Rich	47.0

County	Hachman Index
Grand	46.1
Kane	44.6
Sevier	42.2
Garfield	40.4
Summit	38.9
Daggett	36.8
Millard	30.8
Carbon	30.0

County	Hachman Index
Piute	25.2
Uintah	23.3
Beaver	20.4
Emery	20.3
Duchesne	14.0

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

Economic Development

12

Economic Development Corporation of Utah (EDC Utah)
Utah Governor's Office of Economic Opportunity (GO Utah)

2021 OVERVIEW

Under Governor Cox's leadership and working with legislative leaders, the Governor's Office of Economic Development changed its name on July 1, 2021, to the Governor's Office of Economic Opportunity, with a nickname of GO Utah. The change includes a more people-focused approach to economic development to increase opportunity for all Utahns.

The GO Utah office serves as a steward to the world's best economy and quality of life by cultivating prosperity, future-proofing Utah's economy, and working with the private sector at the speed of business. Working with Governor Cox's administration and the Utah Economic Opportunity Commission, and the passage of HB348 titled Economic Development Initiative, GO Utah convenes stakeholders to provide data, information, and recommendations to the Legislature to grow Utah's economy. The State's policies and business-friendly environment continue to make Utah the right place to live, work, and recreate where Mother Nature played favorites.

The ongoing coronavirus pandemic continues to pose challenges to the state's economic growth. Since the pandemic began, GO Utah has distributed more than $185 million in grant programs utilizing state and federal resources. The team has also managed the Business Resources section of coronavirus.utah.gov and the multi-million-dollar *In Utah* economic reactivation campaign (see inutah.org).

GO Utah specifically targeted COVID-19 relief funds to support the state's small businesses (fewer than 250 employees). More than 99% of total pandemic relief funds GO Utah administered went to Utah small businesses, with 57% of total funds going to businesses with 10 employees or less.

GO Utah COVID-19 grant programs targeted the industries struggling the most during the pandemic, including food and beverage, leisure and hospitality, retail, and healthcare. Together, those industries accounted for 55% of grant funds distributed. Additionally, 30% of the total funds went to businesses headquartered in Utah's rural counties.

Expansion and Relocation Projects

The COVID-19 pandemic deeply impacted the types of expansion and relocation projects considering Utah. In the two years leading up to March 2020, the information technology industry dominated the expansion and relocation project pipeline, accounting for about 33% of expansions. The share of information technology-related project wins dropped significantly from March 2020 to November 2021, accounting for only 21% of project wins during that time frame.

Since expansion and relocation projects, with their affixed job creation and capital investment numbers, remained steady after March 2020, the significant reduction in information technology expansions, and other office-real estate-related industry expansions, highlighted a significant shift in economic development in Utah. The sources of expansion projects shifted to the manufacturing, industrial, and distribution-related industries. From 2018 to 2020, manufacturing and distribution-related projects accounted for 24% of expansion project wins. From March 2020 onward, the percentage increased to 39% of expansion project wins. This increase in manufacturing and distribution-related expansions can be attributed to recent reshoring efforts, attempts to mitigate supply chain constraints, and other market factors.

Whether or not this impact on the expansion and relocation pipeline of projects is permanent or temporary is yet to be seen, but the effect is significant. Manufacturing and distribution projects generally have more complex site requirements, require higher capital investment, change the dynamics of power and other

infrastructure needs, and require more technical support from economic developers.

Major Projects

In 2021, GO Utah and the Economic Development Corporation of Utah (EDCUtah) worked together to support 27 company relocations or expansions in Utah. These projects are estimated to provide 19,700 jobs to the state's economy and include capital investments totaling more than $1.5 billion.

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 recorded the nation's lowest unemployment rate at 2.1%.

Utah continues to receive recognition as a leading global business destination. *Forbes* ranks Utah No. 1 for GDP Growth, WalletHub ranked the state No. 1 for Best State Economy, and *U.S. News & World Report* ranked Utah its No. 1 economy and No. 3 Best State overall. Heartland Forward ranks Utah #3 in Entrepreneurial Capacity, Site Selection Group ranks Utah #2 in its Best States for Manufacturing rankings, and *Site Selection* magazine ranks Utah as the best state in the Intermountain West for workforce development.

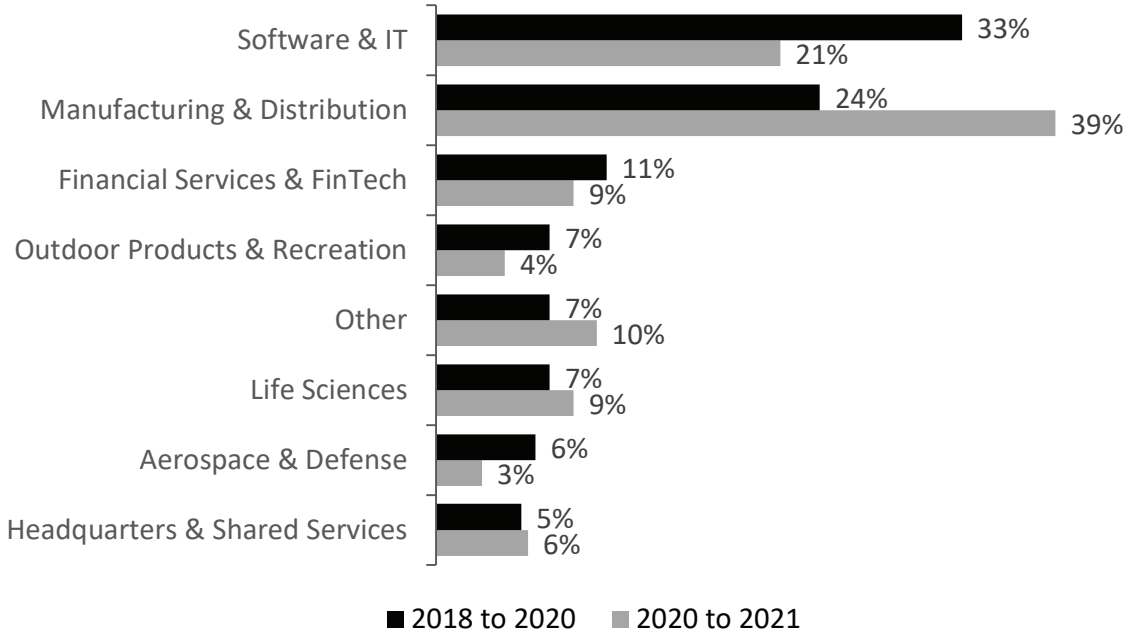
Targeted Industries

Utah's targeted industries employed over 285,000 Utahns in 2021, an increase from 274,000 in 2020 and 265,000 in 2019, demonstrating 4.01% growth.[1] Utah updated its targeted industries in 2021 to include advanced manufacturing, aerospace and defense, financial services, life sciences and healthcare, and software and information technology.

2022 OUTLOOK

Utah's diverse industries and strong economic growth signal a continued recovery from the COVID-19 pandemic through 2022.

Figure 12.1: Changes in the Pipeline of Expansion and Relocation Projects, 2018–2021



Source: Economic Development Corporation of Utah

1 *The Economic Development Corporation of Utah*. Internal data. 2 Dec. 2020.

Table 12.1: Summary of Economic Recovery Grant Programs in Utah, 2020-2021

Grant Program	No. of Applications	No. of Grants Awarded	Funds Disbursed
2020 Live Events Grant	422	24	$3,000,000
A Mask For Every Utahn	N/A	20	$11,875,267
Bridge Loan	2,047	1,150	$11,975,000
Commercial Rental Assistance Program	1,071	2,025	$20,135,751
In Utah - Education & Outreach	N/A	N/A	$4,608,162
Learn & Work In Utah	189	163	$16,500,000
Oil, Gas, & Mining	69	42	$5,000,000
Tourism Recovery / Meet In Utah	58	58	$13,500,000
Safe In Utah	823	674	$2,719,258
Shop In Utah	1,847	1,212	$64,276,328
Utah Hospital Grant	48	48	$20,000,000

Source: Governor's Office of Economic Opportunity

Table 12.2: Notable Employer Expansions or Relocations in 2021

Company	Jobs	State Wages	State Revenue	Capital Investment	Rebate Percentage	Term
Denali Therapeutics, Inc.	100	$108,105,775	$9,039,295	$40,000,000	15%	10 years
Malouf	4,200	$3,799,007,980	$186,779,980	$450,000,000	30%	20 years
Owens Corning Insulating Systems, LLC	70	$61,477,054	$5,043,074	$52,500,000	50%	10 years
Cytiva	396	$147,621,622	$19,420,258	$231,100,000	25%	10 years
Udo, LLC	300	$150,000,000	$14,353,108	$6,293,894	20%	5 years

Source: Governor's Office of Economic Opportunity

Agriculture

13

Caroline Hargraves, Utah Department of Agriculture and Food

2021 OVERVIEW

General

Total agriculture receipts, or the market value of agricultural commodities, totaled $1.79 billion in 2020, up 2.1% from 2019's $1.76 billion. The farm, forestry, fishing, and related activities sectors provided 25,224 jobs earning a total of $318.7 million.[1]

In 2020, Utah had an estimated 10.7 million acres in farmland, including 8.6 million acres of pastureland, 19.7% of Utah's total 54.3 million acres of land. This ranks Utah as 26th in the country in total land in farms. Utah is home to 17,800 agricultural operations (ranked 37th nationally), with no change since 2019 and down 300 operations from 2018. Utah's average farm size is 601 acres (ranked 12th nationally), up slightly (1.7%) compared with 591 acres in 2018.

Top Counties

Utah's top six counties for 2019 agricultural sales were Beaver ($227 million), Millard ($199 million), Utah ($199 million), Cache ($174 million), Sanpete ($152 million), and Iron ($152 million).[2]

Utah's top five counties in 2020 for 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 crops. Livestock is the foundation of Utah agriculture. Over three-quarters of Utah's agricultural income is generated by livestock and livestock products, with beef cattle and milk leading this sector. Abundant rangelands support the state's livestock production and more than 6,000 cattle-ranching operations.

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, fourth in safflower production, 15th in hog and pig production, 21st in dairy cow production, and 27th in beef cows.

Sales and Prices

In 2020, there were 820,000 cattle and calves, up from 810,000 in 2019, a 1.2% increase. Cattle and calf cash receipts decreased over the same period from $489 million to $456 million, a 6.7% decrease. There were 1 million hogs on Utah farms in 2020, a 4.2% year-over increase. Pork sales increased 44.3% from $106 million in 2019 to $153 million in 2020. Sheep and lambs totaled 285,000 in 2020, holding steady with 2019 data. There were 95,000 milk cows in 2020, compared with 97,000 in 2019, a 2.1% decrease. The compensation price for milk decreased slightly over the same period from $18.50/cwt to $18.20/cwt[4], a 1.6% decrease.

Animal and animal product sales increased 3% from $1.21 billion in 2019 to $1.25 billion in 2020. Total crop sales decreased slightly from $545.5 million in 2019 to $545.1 million in 2020, a 0.1% decrease.

Total agricultural sales figures do not reflect the input value of commodities produced and used on Utah farms and ranches, such as hay, grain, and corn fed to livestock (although as inputs they are incorporated into output values). By incorporating this value, the overall contribution of agriculture production would increase substantially.

1 U.S. Bureau of Economic Analysis. 2020 data were the most recent available at the time of publication.
2 *2021 Utah Agriculture Statistics* and *Utah Department of Agriculture and Food Annual Report*. 2019 data were the most recent available at the time of publication.
3 Ibid.
4 cwt = hundredweight or 100 lbs.

Significant Issues

Utah farmers and ranchers faced one of the most extreme droughts on record this year, resulting in devastating losses for many producers. As the industry prepares for the future, agricultural water access and water optimization projects to improve efficiency will be pressing needs in the years ahead.

Additionally, 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 significant uncertainty with 63% of Utah lands under federal control, in addition to market volatility and supply chain disruptions.

Predation, led by coyotes, continues to be a problem for sheep, cattle, and poultry producers. 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 2020, 16,300 sheep were lost solely to coyotes, up 12.9% from 2019. An additional 6,200 sheep were lost in 2020 to cougars and bears, down 24.2% from 2019.

Agriculture Sustainability

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

Utah's population growth, land prices, and fluctuating operating costs and market prices for agricultural products continue to pressure conversion of fruit, vegetable, and other farmland for residential and commercial development. In the nation's second most arid state, growth continues to pressure conversion of agricultural water to municipal and industrial uses.

Farmers continue to face economic uncertainty. In 2019, the farmer share of food spending declined slightly to 14.3 cents per dollar, from 14.6 in 2018. In the same period, farm production costs per food dollar declined from 8 cents in 2018, to 7.6 cents.[5]

2022 OUTLOOK

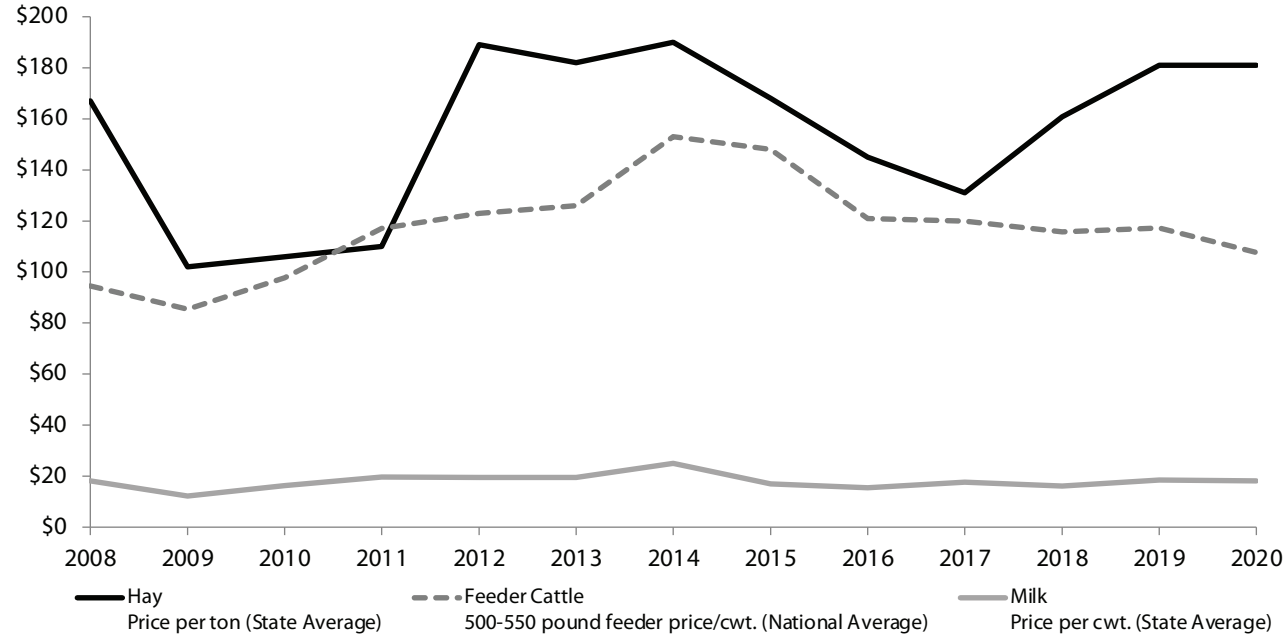
Agricultural production and processing play a significant role in Utah's diverse economy. In recent years, the impacts of COVID-19 and subsequent supply chain disruptions have exposed new vulnerabilities, brought past vulnerabilities to the surface, and have highlighted the importance of a safe and secure local food supply chain. The meat supply chain in particular has proven to be at risk from market disruptions.

Connecting local agricultural production with local processing could hold substantial opportunities for economic growth and food security. Expanding infrastructure for meat processing, fruit processing and packaging, and co-packing and bottling presents unique opportunities to capture manufacturing dollars for agricultural products in Utah.[6]

Developing countries, expanding global markets, and changing consumer food purchasing behaviors keep Utah's production agriculture industry evolving and in demand. Additionally, farms and ranches provide open space and are highly valued contributors to Utahns' quality of life. Population growth in a state with limited water and private land continues to put pressure on these natural resources to transition from food production to urban development. Other opportunities for Utah agriculture include growth in agritourism and innovative processing and distribution systems such as food hubs. Helping citizens develop a deeper connection with and understanding of the importance of agriculture will be key in continuing a successful future for the industry.

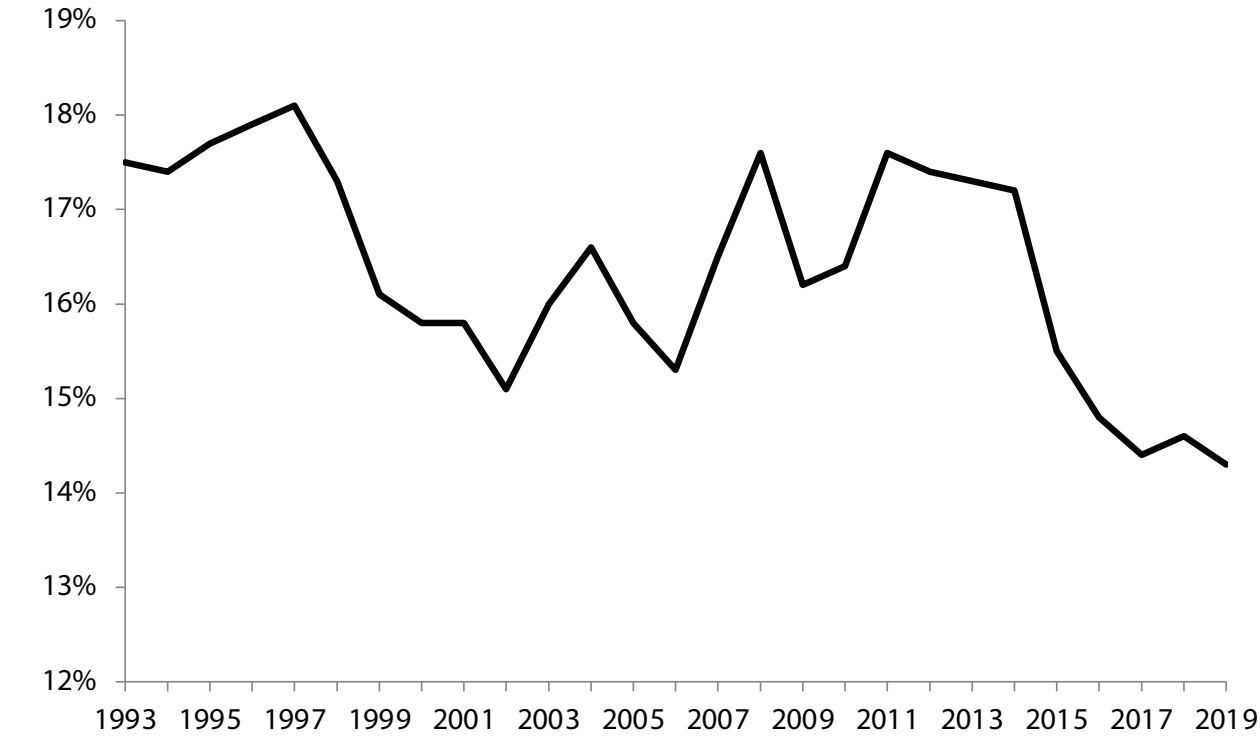
5 United States Department of Agriculture & Economic Research Service
5 Utah Department of Agriculture and Food 2021 Centennial Strategic Plan

Figure 13.1: Nominal Average Annual Price Received in Major Utah Agricultural Sectors



Note: cwt = hundreweight or 100 lbs.
Source: U.S. Department of Agriculture & Utah Department of Agriculture and Food

Figure 13.2: Farmers' Share of Food Spending



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

Defense

14

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

2021 OVERVIEW

Employment

In 2020, there were 35,455 total federal defense employees in Utah: 16,784 military personnel and 18,671 civilian employees. This was a 2.7% increase from 2019. Over the past five years, Utah has seen a net gain of 2,068 federal civilian jobs (12.5% increase) and 822 military personnel (5.1% increase). The installations that employ most of Utah's federal defense employees are Hill Air Force Base, Dugway Proving Ground, Tooele Army Depot, Utah National Guard, the Reserves, and Veteran Affairs (benefits office, hospital, clinics, and centers). Federal defense employment does not include defense-related private sector employment, such as jobs at defense contractors.

Federal defense employment in Utah shrank from 42,474 in 1990 to a low of 29,276 in 1999. In 2020, defense employment reached 35,455, its highest-level post-1993. However, defense's share of total employment was 2.2% in 2020, significantly lower than its share of 5.5% in 1990. Even with recent employment gains since 2014, defense's share of total employment has fallen due to the rest of Utah's economy growing faster.

In 2020, 81.5% of federal defense employment in Utah was located in three counties: 19,015 jobs in Davis County (53.6%), 8,468 jobs in Salt Lake County (23.9%), and 1,404 jobs in Tooele County (4.0%). 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 2020. The largest installations in Salt Lake and Tooele counties were the reserve branches of the armed forces and Dugway Proving Ground, respectively.

Compensation

Utah's compensation per federal defense job has historically been considerably higher than Utah's average compensation rate, with the gap widening to over 50% in 2009. Even with some tapering in recent years, federal defense jobs in Utah offered an average of $88,250 in compensation, 30.5% more than the $67,607 at non-defense jobs in 2020.

Veterans

The National Center for Veterans Analysis and Statistics estimated 134,230 veterans lived in Utah in 2020, 17,968 of whom were military retirees. The largest numbers of veterans were in Salt Lake, Davis, Utah, and Weber counties. Retirees are concentrated in Davis, Salt Lake, and Weber counties, with relatively strong presences in Utah and Washington counties. By 2045, the veteran population is expected to decline to 100,000 individuals.

Contracts and Grants

At $2.1 billion in FY 2020, the total value of Department of Defense (DOD) and Veteran Affairs (VA) contracts and grants in Utah has increased steadily over the past few years, but it is still well below peak spending of $4.0 billion in 2007. Annual amounts vary considerably, driven primarily by changes in DOD contracting levels. Even with fluctuations from year to year, DOD contracts consistently make up a majority share of total awards, ranging between 87% to 97% depending on the year. Total grant awards typically are between 1% and 11% of total awards. In 2020, DOD contracts and grants accounted for 92% of total Utah awards; the split was 94% to the DOD and 6% to the VA.

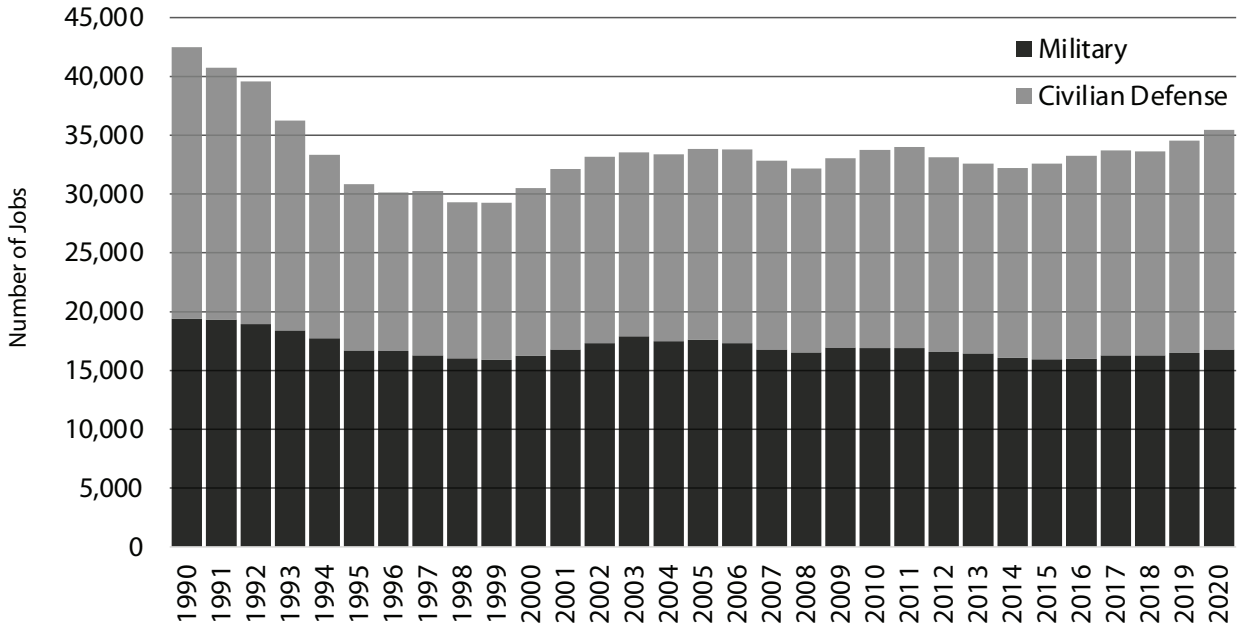
2022 OUTLOOK

Employment at the majority of Utah's military installations is projected to remain relatively stable for 2022. However, the growth in Utah's defense employment experienced over the past several years is expected to continue predominantly due to growth in and around Hill Air Force Base associated with the Ground Based Strategic Deterrent (GBSD) program. The Northrup Grumman Corporation business complex—which houses Northrup's GBSD headquarters—is located in the Falcon Hill National Aerospace Research Park adjacent to Hill Air Force Base. The space now has two large office buildings and one research facility in operation, with a fourth building nearing completion. Northrup will continue its hiring program to fully populate these facilities over the next several years.

In addition to the growth in defense employment associated with the continuing Northrup build-up, the state will likely see growth in defense contracts associated with the GBSD program as well. While not all of the projected $80 billion associated with this program will be spent in Utah, a portion of that spending can be expected to go to Utah businesses.

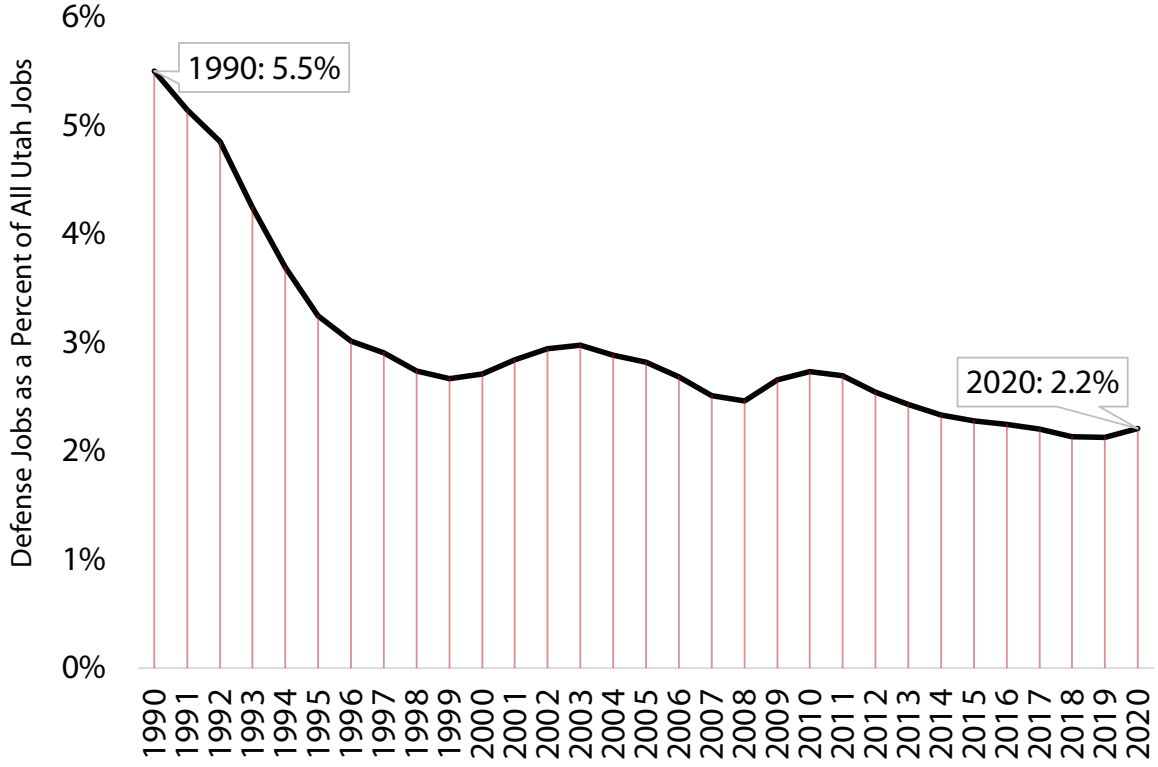
This growth in defense activity in and around Hill Air Force Base will not be without challenges for the northern Utah communities which will host this growth. The lack of availability and the rising cost of adequate housing is already creating challenges for defense contractors and military members relocating to northern Utah with no near-term relief in sight. Further, the ability to attract the large technically educated workforce needed by the defense community, coupled with the growth in technical hiring in other parts of the state, will make filling vital STEM jobs a challenge across Utah. It will be increasingly important for Utah's local and state elected leaders to understand these challenges and help look for solutions where possible.

Figure 14.1: Military and Federal Civilian Defense Employment in Utah, 1990–2020



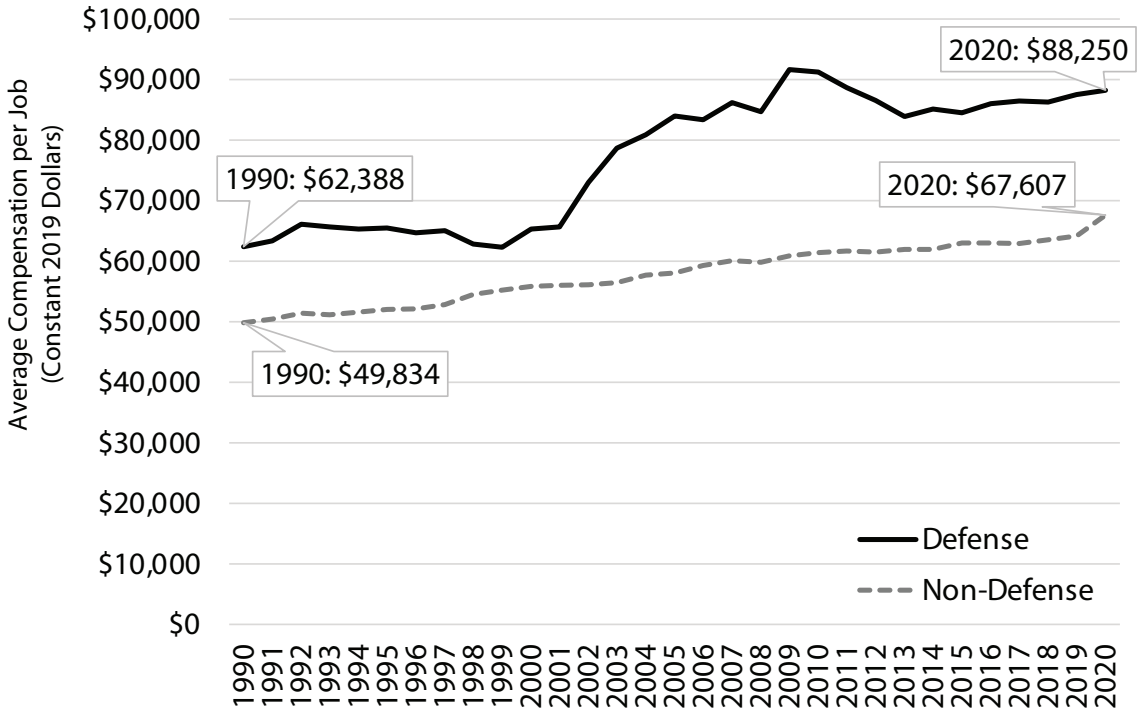
Note: Federal defense employment includes the military, whether active-duty employment or part-time employment in reserve or National Guard units. It also includes federal civilian employment for national security and medical care provided by the VA and DOD.
Source: Bureau of Economic Analysis, Bureau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

Figure 14.2: Defense Share of Total Employment in Utah, 1990–2020



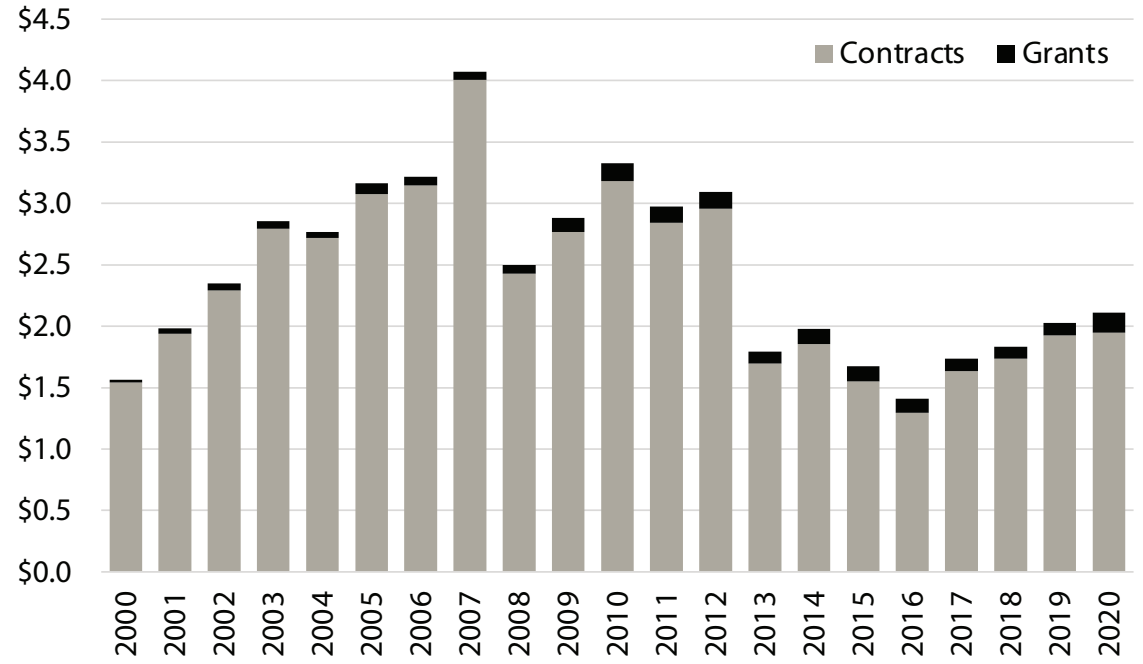
Source: Bureau of Economic Analysis, Bureau of Labor Statistics.

Figure 14.3: Compensation per Utah Job, Defense vs. Non-Defense, 1990–2020



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

Figure 14.4: Total DoD and VA Prime Contracts and Grants Performed in Utah, 1990–2020



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

Table 14.1: Defense Employment and Compensation in Utah, Selected Years 1990–2020

	Employment				Compensation (Millions of Dollars)			
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	5.5%	$784.7	$1,865.2	$2,649.8	6.8%
1991	19,336	21,387	40,723	5.1%	$800.1	$1,781.3	$2,581.5	6.4%
1992	18,938	20,619	39,557	4.9%	$800.8	$1,812.4	$2,613.2	6.2%
1993	18,406	17,850	36,256	4.2%	$742.6	$1,639.5	$2,382.0	5.4%
1994	17,748	15,570	33,318	3.7%	$713.7	$1,461.9	$2,175.6	4.6%
1995	16,695	14,134	30,829	3.2%	$685.6	$1,333.4	$2,019.0	4.0%
1996	16,676	13,472	30,148	3.0%	$699.8	$1,249.7	$1,949.5	3.7%
1997	16,261	13,975	30,236	2.9%	$678.2	$1,288.5	$1,966.6	3.6%
1998	16,033	13,277	29,310	2.7%	$551.8	$1,289.4	$1,841.2	3.1%
1999	15,922	13,354	29,276	2.7%	$560.4	$1,263.5	$1,823.9	3.0%
2000	16,222	14,291	30,513	2.7%	$580.1	$1,412.9	$1,993.0	3.2%
2001	16,761	15,375	32,136	2.8%	$620.9	$1,488.9	$2,109.8	3.3%
2002	17,334	15,825	33,159	2.9%	$790.7	$1,630.7	$2,421.5	3.8%
2003	17,918	15,618	33,536	3.0%	$980.3	$1,657.9	$2,638.3	4.1%
2004	17,500	15,874	33,374	2.9%	$995.8	$1,703.6	$2,699.4	4.0%
2005	17,608	16,232	33,840	2.8%	$1,076.7	$1,764.5	$2,841.2	4.0%
2006	17,326	16,464	33,790	2.7%	$1,006.6	$1,809.9	$2,816.5	3.7%
2007	16,768	16,072	32,840	2.5%	$975.0	$1,857.1	$2,832.1	3.6%
2008	16,540	15,638	32,178	2.5%	$983.1	$1,743.4	$2,726.5	3.5%
2009	16,959	16,069	33,028	2.7%	$1,080.8	$1,946.1	$3,026.9	3.9%
2010	16,886	16,881	33,767	2.7%	$1,070.5	$2,011.0	$3,081.5	4.0%
2011	16,896	17,115	34,011	2.7%	$989.8	$2,025.9	$3,015.6	3.8%
2012	16,570	16,561	33,131	2.5%	$930.1	$1,938.3	$2,868.4	3.5%
2013	16,432	16,171	32,603	2.4%	$891.0	$1,845.3	$2,736.4	3.3%
2014	16,074	16,126	32,200	2.3%	$836.1	$1,905.5	$2,741.6	3.2%
2015	15,962	16,603	32,565	2.3%	$800.7	$1,951.9	$2,752.6	3.0%
2016	15,970	17,297	33,267	2.2%	$825.4	$2,037.2	$2,862.6	3.0%
2017	16,262	17,434	33,696	2.2%	$829.5	$2,082.8	$2,912.3	3.0%
2018	16,300	17,346	33,646	2.1%	$858.9	$2,043.7	$2,902.7	2.9%
2019	16,506	18,032	34,538	2.1%	$898.1	$2,124.4	$3,022.5	2.9%
2020	16,784	18,671	35,455	2.2%	$929.4	$2,199.5	$3,128.9	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. Total Utah employment consists of total full- and part-time employment. All dollars are in millions of constant 2019 dollars.
Source: Source: Bureau of Economic Analysis, Bureau of Labor Statistics.

Table 14.2: Total DoD and VA Prime Contracts and Grants Performed in Utah, FY 2000–FY 2020
(Millions of Constant FY 2020 Dollars)

	Contracts			Grants			Contracts & Grants		
Fiscal Year	DoD	VA	Total	DoD	VA	Total	DoD	VA	Total
2000	$1,500.1	$18.3	$1,518.4	$42.1	$2.0	$44.1	$1,542.2	$20.2	$1,562.4
2001	$1,899.2	$40.6	$1,939.8	$41.3	$2.1	$43.5	$1,940.6	$42.7	$1,983.3
2002	$2,244.4	$51.3	$2,295.7	$48.6	$2.2	$50.8	$2,293.0	$53.5	$2,346.5
2003	$2,762.3	$60.7	$2,823.0	$29.4	$2.3	$31.7	$2,791.7	$62.9	$2,854.7
2004	$2,684.2	$44.2	$2,728.4	$35.2	$2.3	$37.5	$2,719.4	$46.6	$2,765.9
2005	$3,037.4	$83.7	$3,121.1	$39.5	$2.3	$41.8	$3,076.9	$86.0	$3,162.8
2006	$3,115.9	$67.7	$3,183.7	$28.5	$2.4	$30.8	$3,144.4	$70.1	$3,214.5
2007	$3,969.1	$68.1	$4,037.2	$36.1	$0.0	$36.1	$4,005.2	$68.1	$4,073.3
2008	$2,373.8	$71.7	$2,445.5	$53.3	$0.1	$53.5	$2,427.2	$71.8	$2,499.0
2009	$2,691.2	$112.1	$2,803.3	$77.0	$0.0	$77.0	$2,768.1	$112.1	$2,880.3
2010	$3,126.8	$130.4	$3,257.2	$53.8	$16.5	$70.4	$3,180.6	$146.9	$3,327.6
2011	$2,771.0	$120.9	$2,891.8	$73.0	$11.7	$84.6	$2,843.9	$132.5	$2,976.5
2012	$2,901.4	$105.7	$3,007.2	$56.8	$28.1	$84.9	$2,958.2	$133.8	$3,092.0
2013	$1,647.8	$96.3	$1,744.1	$49.3	$1.4	$50.7	$1,697.1	$97.7	$1,794.8
2014	$1,754.6	$101.0	$1,855.6	$100.1	$21.2	$121.3	$1,854.7	$122.2	$1,976.9
2015	$1,463.9	$93.9	$1,557.8	$87.3	$29.9	$117.2	$1,551.2	$123.8	$1,675.0
2016	$1,220.5	$110.2	$1,330.7	$75.3	$2.1	$77.4	$1,295.8	$112.3	$1,408.1
2017	$1,467.3	$68.6	$1,535.9	$167.5	$30.9	$198.4	$1,634.8	$99.5	$1,734.3
2018	$1,660.8	$69.0	$1,729.8	$76.1	$27.5	$103.7	$1,736.9	$96.5	$1,833.5
2019	$1,864.1	$67.6	$1,931.7	$60.4	$34.8	$95.2	$1,924.5	$102.4	$2,026.9
2020	$1,843.3	$114.3	$1,957.6	$105.9	$45.4	$151.4	$1,949.2	$159.7	$2,109.0

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

Education: Higher

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Carrie Mayne, Utah System of Higher Education
Brett Campbell, Utah System of Higher Education

2021 OVERVIEW

The year 2021 was driven by adjustment for the sixteen institutions that comprise the Utah System of Higher Education (USHE) as students transitioned from virtual learning to in-person coursework with the slowing of the COVID-19 pandemic and the spread of vaccinations. Students whose training involved hands-on work at technical colleges were able to once again put tools and machines to work in an instructor-led classroom to hone their workforce-specific skills. Despite that return to the classroom, overall growth in the USHE system was tepid.

Enrollment

Increases in enrollment resumed with a rate of 1.6% between fall 2020 and fall 2021 third week headcounts. The year before enrollments exhibited a slight drop of 0.2%. The total degree-granting headcount for fall 2021 was 192,132, an increase of 3,111 over 2020. Despite COVID-19, USHE's enrollment growth at degree-granting institutions is expected to outpace the country, with an anticipated 56,000 additional students enrolling in USHE schools over the next 10 years.

Due to the hands-on nature of many certificate training programs, technical colleges' enrollments were more drastically affected by the pandemic and continue to struggle rebounding to pre-pandemic levels. Fall 2020 exhibited a year-over loss of 17.2% in postsecondary enrollments. Fall 2021 enrollments were essentially the same as the prior year.

Degrees and Awards

USHE colleges and universities issued 47,974 certificates and degrees to the class of 2021, an 8.9% increase over the prior year. Significant growth in associate degrees, driven by institutional focus on award stacking, outweighed the zero or negative growth in all other award categories which may have been caused by course completion challenges created by the pandemic.

Utah's eight technical colleges issued 7,462 certificates in fiscal year 2021, a 16.6% increase over fiscal year 2020. The most common certificates were in the fields of health professions, culinary and personal services, and mechanic and repair technicians. These fields comprised 67.4% of the total certificate volume for the technical colleges.

COVID-19

The coronavirus pandemic continued to affect students, staff, and faculty in 2021. Institutions adjusted course offerings and utilized space as a protective measure. While enrollment growth was positive, the growth was not consistent across all populations. Significantly fewer Hispanic/Latino students enrolled in fall 2020, a drop of 1.7%. Since then, the Hispanic/Latino headcount has returned to the fall 2019 level. More concerning, the Native American/Alaskan Native student headcount dropped two years in a row for a total of 8.1% over fall 2019. Similarly, Pacific Islander enrollment dropped 3.4% over the same two years.

Conversely, enrollment gains were made over both years for Black/African American students (7.2%) and multi-racial/ethnic students (7.7%). The number of white students remained essentially unchanged.

While remaining enrolled, students adapted to unique circumstances. One strategy was to enroll in fewer courses. USHE students enrolled in fewer courses for both spring 2020 and fall 2021 terms. This appears to be a strategy to maintain their GPA as we saw little change in the average GPA between terms.

Another student response to the pandemic was to withdraw from courses. A significant increase in course withdrawals (5.4%) occurred in the spring 2020 term. Most withdrawals occurred in required, challenging courses such as mathematics and biology. Other characteristics of withdrawals included students dropping many more online

courses than face-to-face. Men dropped more courses than women, and Pacific Islander and Black/African American students dropped far more than students of other races/ethnicities. Course withdrawals in the fall 2021 term returned to a typical rate (3.9%).

Statewide Attainment Goals

Senate Bill 193 from the 2021 session of the Utah Legislature codified changes in a portion of the funding available to USHE institutions to align with the statewide higher education attainment goals. The goals, designed to foster economic growth, are in the areas of student access, completion, and workforce alignment. Each institution is expected to set five-year goals marking their contribution to the system-wide goals in each of the three measurement areas. Aligning supplementary funding to the attainment goals allows institutions to focus on the key areas that drive student success and economic vitality for our state.

The access goal encourages student enrollment in higher education following high school graduation. Currently, about 36.1% of all Utah high school graduates do not enroll in a postsecondary technical or degree-granting program in Utah or elsewhere. The System proposes to reduce that number to 31.5% in the academic year 2027 by increasing the percentage of Utah high school graduates attending USHE technical education and degree-granting institutions.

The timely completion goal encourages USHE institutions to find innovative solutions to move students through certificate and degree programs to graduation in a timely manner. Currently, about 47% of all USHE degrees and awards are achieved within one-and-a-half time (1.5 years for a one-year certificate, 6-years for a bachelor's degree, etc.). The System proposes to increase that number to 50.44% in the academic year 2027 by increasing the timely completion rates of each USHE institution.

The high-yield award goal encourages USHE institutions to advise students to seek certificate and degree programs that lead to jobs in high-wage, high-demand fields. Currently, about 66% of all USHE awards are aligned with high-wage, high-demand occupations (4- and 5-star jobs verified by the Utah Department of Workforce Services). The System proposes to increase that number to 74% in the academic year 2027 by increasing the percent of high-yield awards at each USHE institution.

2022 OUTLOOK

While student enrollment at USHE institutions has generally rebounded from the pandemic, particular enrollment subcategories are trending down and will likely continue to do so in 2022. Two of those subcategories are enrollments in community colleges, which is also a national phenomenon, and enrollments of male students, specifically those under the age of 25. Robust labor market conditions moving into the new year may also pull more individuals into employment and away from higher education, further challenging institutions as they strive to meet the statewide higher education attainment goals.

Table 15.1: Utah System of Higher Education, Fall End-Of-Term* Enrollments at Degree-Granting Institutions and State of Utah Population

Year	Fall Enrollment	Annual Change		Estimated State Pop.	Annual Change		Enrollment/ Population
		Absolute	Percent		Absolute	Percent	
1980	61,115	3,474	6.0%	1,474,000	58,050	4.1%	4.1%
1981	63,090	1,975	3.2%	1,515,000	41,000	2.8%	4.2%
1982	67,056	3,966	6.3%	1,558,000	43,000	2.8%	4.3%
1983	69,579	2,523	3.8%	1,595,000	37,000	2.4%	4.4%
1984	69,212	-367	-0.5%	1,622,000	27,000	1.7%	4.3%
1985	70,615	1,403	2.0%	1,643,000	21,000	1.3%	4.3%
1986	72,674	2,059	2.9%	1,663,000	20,000	1.2%	4.4%
1987	73,088	414	0.6%	1,678,000	15,000	0.9%	4.4%
1988	74,929	1,841	2.5%	1,690,000	12,000	0.7%	4.4%
1989	74,884	-45	-0.1%	1,706,000	16,000	0.9%	4.4%
1990	80,430	5,546	7.4%	1,729,227	23,227	1.4%	4.7%
1991	86,843	6,413	8.0%	1,780,870	51,643	3.0%	4.9%
1992	94,923	8,080	9.3%	1,838,149	57,279	3.2%	5.2%
1993	99,163	4,240	4.5%	1,889,393	51,244	2.8%	5.2%
1994	103,633	4,470	4.5%	1,946,721	57,328	3.0%	5.3%
1995	110,594	6,961	6.7%	1,995,228	48,507	2.5%	5.5%
1996	112,666	2,072	1.9%	2,042,893	47,665	2.4%	5.5%
1997	116,047	3,381	3.0%	2,099,409	56,516	2.8%	5.5%
1998	129,755	13,708	11.8%	2,141,632	42,223	2.0%	6.1%
1999	139,249	9,494	7.3%	2,193,014	51,382	2.4%	6.3%
2000	142,116	2,867	2.1%	2,246,468	53,539	2.4%	6.3%
2001	155,539	13,423	9.4%	2,290,634	44,166	2.0%	6.8%
2002	154,192	-1,347	-0.9%	2,331,826	41,192	1.8%	6.6%
2003	156,162	1,970	1.3%	2,372,458	40,632	1.7%	6.6%
2004	162,553	6,391	4.1%	2,430,223	57,765	2.4%	6.7%
2005	160,317	-2,236	-1.4%	2,505,843	75,620	3.1%	6.4%
2006	157,802	-2,515	-1.6%	2,576,229	70,386	2.8%	6.1%
2007	158,349	547	0.3%	2,636,075	59,846	2.3%	6.0%
2008	163,593	5,244	3.3%	2,691,122	55,047	2.1%	6.1%
2009	175,810	12,217	7.5%	2,731,560	40,438	1.5%	6.4%
2010	179,837	4,027	2.3%	2,772,667	41,107	1.5%	6.5%
2011	183,008	3,171	1.8%	2,822,091	49,424	1.8%	6.5%
2012	179,842	-3,166	-1.7%	2,867,404	45,313	1.6%	6.3%
2013	174,221	-5,621	-3.1%	2,906,022	38,618	1.3%	6.0%
2014	173,962	-259	-0.1%	2,946,989	40,967	1.4%	5.9%
2015	175,092	1,130	0.6%	3,003,792	56,803	1.9%	5.8%
2016	179,851	4,759	2.7%	3,062,384	58,592	2.0%	5.9%
2017	186,060	6,209	3.5%	3,122,477	60,093	2.0%	6.0%
2018	189,086	3,026	1.6%	3,176,342	45,132	1.4%	6.0%
2019	193,863	4,777	2.5%	3,231,108	54,766	1.7%	6.0%
2020	193,536	-327	-0.2%	3,284,823	53,715	1.7%	5.9%
2021*	192,132	-1,404	-0.7%	3,343,552	58,729	1.8%	5.7%

*Fall 2021 End-of-Term (EOT) data were unavailable at the time of publication. This figure represents 3rd week data and will be updated to EOT next year.
Note: Enrollment figures prior to 1998 sourced from fall term 3rd week enumeration. Thereafter, enrollment figures are sourced from fall end of term enumeration.
Source: Utah System of Higher Education Fall End-of-Term Enrollment Data, Utah Population Committee

Table 15.2: Utah System of Higher Education, Fall 3rd Week Enrollment at Degree-Granting Institutions, by County

County	Fall 2017	Fall 2018	Fall 2019	Fall 2020	Fall 2021	Total Annual Change				Percent Change			
Beaver	318	313	280	349	315	-5	-33	69	-34	-1.6%	-10.5%	24.6%	-9.7%
Box Elder	1,704	1,622	1,492	2,100	2,233	-82	-130	608	133	-4.8%	-8.0%	40.8%	6.3%
Cache	4,336	3,943	3,570	6,308	6,652	-393	-373	2,738	344	-9.1%	-9.5%	76.7%	5.5%
Carbon	581	525	402	850	885	-56	-123	448	35	-9.6%	-23.4%	111.4%	4.1%
Daggett	28	28	30	30	30	0	2	0	0	0.0%	7.1%	0.0%	0.0%
Davis	18,825	19,211	19,750	21,418	21,662	386	539	1,668	244	2.1%	2.8%	8.4%	1.1%
Duchesne	413	456	423	599	651	43	-33	176	52	10.4%	-7.2%	41.6%	8.7%
Emery	332	365	320	540	560	33	-45	220	20	9.9%	-12.3%	68.8%	3.7%
Garfield	211	208	184	202	222	-3	-24	18	20	-1.4%	-11.5%	9.8%	9.9%
Grand	195	199	185	285	280	4	-14	100	-5	2.1%	-7.0%	54.1%	-1.8%
Iron	2,617	2,429	2,426	2,477	2,692	-188	-3	51	215	-7.2%	-0.1%	2.1%	8.7%
Juab	544	554	511	530	543	10	-43	19	13	1.8%	-7.8%	3.7%	2.5%
Kane	275	296	323	348	333	21	27	25	-15	7.6%	9.1%	7.7%	-4.3%
Millard	662	641	656	658	655	-21	15	2	-3	-3.2%	2.3%	0.3%	-0.5%
Morgan	569	604	642	714	809	35	38	72	95	6.2%	6.3%	11.2%	13.3%
Piute	60	81	80	73	77	21		-7	4	35.0%	-1.2%	-8.8%	5.5%
Rich	98	103	77	124	112	5	-26	47	-12	5.1%	-25.2%	61.0%	-9.7%
Salt Lake	48,680	48,165	48,150	48,420	48,491	-515	-15	270	71	-1.1%	-0.0%	0.6%	0.1%
San Juan	472	450	367	553	585	-22	-83	186	32	-4.7%	-18.4%	50.7%	5.8%
Sanpete	1,447	1,545	1,486	1,645	1,508	98	-59	159	-137	6.8%	-3.8%	10.7%	-8.3%
Sevier	1,100	1,153	1,183	1,180	1,135	53	30	-3	-45	4.8%	2.6%	-0.3%	-3.8%
Summit	1,767	1,862	1,922	2,082	2,034	95	60	160	-48	5.4%	3.2%	8.3%	-2.3%
Tooele	2,116	2,084	1,946	2,602	2,691	-32	-138	656	89	-1.5%	-6.6%	33.7%	3.4%
Uintah	527	574	490	861	889	47	-84	371	28	8.9%	-14.6%	75.7%	3.3%
Utah	29,946	31,281	32,402	34,044	31,979	1,335	1,121	1,642	-2,065	4.5%	3.6%	5.1%	-6.1%
Wasatch	1,575	1,783	1,741	1,837	1,771	208	-42	96	-66	13.2%	-2.4%	5.5%	-3.6%
Washington	6,902	7,138	7,821	8,267	8,085	236	683	446	-182	3.4%	9.6%	5.7%	-2.2%
Wayne	108	121	103	96	98	13	-18	-7	2	12.0%	-14.9%	-6.8%	2.1%
Weber	10,900	10,690	11,039	11,464	11,669	-210	349	425	205	-1.9%	3.3%	3.8%	1.8%
Other U.S. Locations	26,729	28,022	28,264	29,611	30,749	1,293	242	1,347	1,138	4.8%	0.9%	4.8%	3.8%
Foreign Locations	5,648	5,503	5,832	5,167	6,224	-145	329	-665	1,057	-2.6%	6.0%	-11.4%	20.5%
Unknown/ Unidentified	10,349	12,000	15,254	3,587	5,513	1,651	3,254	-11,667	1,926	16.0%	27.1%	-76.5%	53.7%
Total	180,034	183,949	189,351	189,021	192,132	3,915	5,402	-330	3,111	2.2%	2.9%	-0.2%	1.6%

Source: Utah System of Higher Education Fall 3rd Week Enrollment Data

Table 15.3: Degrees and Awards by Race/Ethnicity at Degree-Granting Public Institutions in Utah, Academic Year, 2020–2021

USHE Institution	Total Degrees Awarded	American Indian or Alaskan Native	Asian	Black or African American	Hispanic or Latino	Native Hawaiian or Pacific Islander	Non-resident Alien	Two or more races	White	Race/ Ethnicity Not Specified
University of Utah	9,174	110	1141	176	1087	63			6,271	326
Utah State University	7,462	129	99	54	407	24	79	156	6,104	410
Weber State University	6,445	30	121	69	610	21	97	200	4,969	328
Southern Utah University	2,735	34	46	59	176	27	159	18	2,118	98
Snow College	1,389	9	6	12	26	2	34		913	387
Dixie State University	2,658	24	28	39	297		41	69	2,098	62
Utah Valley State College	12,591	42	237	105	1286	72	133	391	10,186	139
Salt Lake Community College	5,520	42	258	118	1037	20	87	218	3,662	78
Total	47,974	420	1,936	632	4,926	229	630	1,052	36,321	1,828
Percent of Total		0.9%	4.0%	1.3%	10.3%	0.5%	1.3%	2.2%	75.7%	3.8%

Source: Utah System of Higher Education

Table 15.4: Full Cost Study Summary (Appropriated Funds Only), 2020–2021

USHE Institution	Direct Cost of Instruction	Full Cost of Instruction	E & G FTE Students 2020–21	Student/ Faculty Ratio	Direct Cost of Instruction per FTE	Full Cost of Instruction per FTE
University of Utah[1]	$256,897,619	$447,022,998	$30,883	20.9	$8,318	$14,475
Utah State University	$186,754,989	$301,237,527	$21,217	20.0	$8,802	$14,198
Weber State University	$81,695,034	$157,662,474	$14,675	16.9	$5,567	$10,744
Southern Utah University	$41,102,848	$91,907,636	$9,455	18.7	$4,347	$9,721
Snow College[2]	$19,657,200	$40,205,695	$3,358	16.4	$5,853	$11,972
Dixie State University	$29,614,061	$71,127,879	$7,788	15.8	$3,802	$9,133
Utah Valley University	$122,882,310	$269,781,068	$24,566	20.4	$5,002	$10,982
Salt Lake Community College[2]	$64,805,407	$146,563,116	$13,504	17.4	$4,799	$10,853
Total	$803,409,467	$1,525,508,393	$125,446	19.0	$6,404	$12,161

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

Source: Utah System of Higher Education

Table 15.5: USHE Summary of Tuition and Fees by Institution

USHE Institution	2002–03	2003–04	2004–05	2005–06	2006–07	2007–08	2008–09	2009–10	2010–11	2011–12	2012–13	2013–14	2014–15	2015–16	2016–17	2017–18	2018–19	2019-20	2020-21
University of Utah																			
Resident	$3,325	$3,646	$4,000	$4,298	$4,663	$4,987	$5,287	$5,746	$6,274	$6,763	$7,139	$7,457	$7,876	$8,197	$8,518	$8,824	$9,222	$9,500	$9,665
Nonresident	$10,182	$11,292	$12,410	$13,370	$14,593	$15,662	$16,600	$18,136	$19,841	$21,388	$22,642	$24,019	$25,208	$26,022	$27,039	$28,067	$29,215	$30,134	$30,711
Utah State University																			
Resident	$2,834	$3,071	$3,247	$3,615	$3,949	$4,199	$4,274	$4,828	$5,150	$5,563	$5,931	$6,185	$6,383	$6,664	$6,866	$7,175	$7,424	$7,659	$7,859
Nonresident	$8,199	$8,946	$9,533	$10,431	$11,449	$12,224	$12,725	$13,802	$14,797	$16,078	$17,077	$17,888	$18,490	$19,133	$19,772	$20,727	$21,505	$22,197	$22,805
Weber State University																			
Resident	$2,427	$2,632	$2,876	$3,165	$3,432	$3,664	$3,854	$4,088	$4,311	$4,547	$4,761	$4,990	$5,183	$5,339	$5,523	$5,712	$5,859	$5,986	$6,106
Nonresident	$7,295	$7,958	$8,736	$9,599	$10,415	$11,135	$11,161	$11,555	$11,901	$12,258	$12,858	$13,311	$13,837	$14,252	$14,749	$15,260	$15,646	$15,969	$16,288
Southern Utah University																			
Resident	$2,350	$2,794	$3,054	$3,358	$3,565	$3,796	$4,028	$4,269	$4,736	$5,198	$5,576	$5,924	$6,138	$6,300	$6,530	$6,676	$6,770	$6,770	$6,770
Nonresident	$7,344	$8,158	$9,008	$9,877	$10,603	$11,327	$12,082	$12,847	$14,386	$15,910	$16,984	$17,902	$18,596	$19,132	$19,810	$20,288	$20,586	$20,586	$20,586
Snow College																			
Resident	$1,523	$1,670	$1,794	$1,996	$2,164	$2,262	$2,348	$2,542	$2,746	$2,910	$3,086	$3,220	$3,388	$3,484	$3,592	$3,692	$3,742	$3,836	$3,912
Nonresident	$5,742	$6,372	$6,556	$7,210	$7,498	$7,889	$8,228	$8,238	$8,984	$9,586	$10,230	$10,722	$11,342	$11,676	$12,070	$12,382	$12,562	$12,876	$13,156
Dixie State University																			
Resident	$1,612	$1,778	$1,886	$1,984	$2,492	$2,728	$2,893	$3,145	$3,489	$3,888	$4,089	$4,285	$4,456	$4,620	$4,840	$5,080	$5,253	$5,496	$5,662
Nonresident	$6,038	$6,554	$7,034	$7,390	$9,056	$9,447	$10,063	$10,897	$12,117	$13,536	$11,721	$12,307	$12,792	$13,206	$13,855	$14,548	$15,051	$15,792	$16,260
Utah Valley University																			
Resident	$2,196	$2,450	$2,788	$3,022	$3,308	$3,528	$3,752	$4,048	$4,288	$4,584	$4,786	$5,086	$5,270	$5,386	$5,530	$5,432	$5,726	$5,820	$5,906
Nonresident	$6,802	$7,630	$8,718	$9,472	$10,338	$11,029	$11,514	$11,888	$12,246	$12,940	$13,518	$14,256	$14,802	$15,202	$15,690	$16,066	$16,296	$16,570	$16,806
Salt Lake Community College																			
Resident	$1,890	$2,035	$2,174	$2,312	$2,404	$2,536	$2,660	$2,790	$2,932	$3,052	$3,170	$3,342	$3,468	$3,568	$3,689	$4,009	$3,843	$3,929	$3,989
Nonresident	$5,800	$6,277	$6,754	$7,232	$7,519	$7,958	$8,374	$8,730	$9,172	$9,604	$10,012	$10,594	$11,010	$11,020	$11,728	$12,020	$12,206	$12,460	$12,709

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

Table 15.6: History of Degrees by Public Degree-Granting Institutions in Utah

Degree	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	1-Year Change		5-Year Change	
									Absolute	Percent	Absolute	Percent
University Totals												
University of Utah	8,023	8,392	8,169	8,554	8,604	8,758	9,147	9,174	27	0.3%	1,005	12.3%
Utah State University1	5,795	6,082	6,231	6,446	6,642	6,978	7,128	7,462	334	4.7%	1,231	19.8%
Weber State University	4,690	5,086	5,105	5,191	5,380	5,615	5,782	6,445	663	11.5%	1,340	26.2%
Southern Utah University	1,565	1,545	1,736	2,177	2,357	2,763	3,027	2,735	-292	-9.6%	999	57.5%
Snow College	745	856	968	1,020	1,055	1,142	1,434	1,389	-45	-3.1%	421	43.5%
Dixie State University	2,003	1,941	1,919	1,935	2,034	2,309	2,538	2,658	120	4.7%	739	38.5%
Utah Valley University	5,242	5,082	5,107	5,024	6,084	6,304	9,917	12,591	2,674	27.0%	7,484	146.5%
Salt Lake Community College	4,428	4,022	4,587	6,432	5,684	4,753	5,058	5,520	462	9.1%	933	20.3%
Total Public	32,491	33,006	33,822	36,779	37,840	38,622	44,031	47,974	3,943	9.0%	14,152	41.8%
Certificates & Awards*												
University of Utah	397	431	386	410	430	488	674	639	-35	-5.2%	253	65.5%
Utah State University	205	247	237	214	258	390	568	826	258	45.4%	589	248.5%
Weber State University	75	90	118	110	144	163	168	360	192	114.3%	242	205.1%
Southern Utah University	9	21	31	113	163	282	404	157	-247	-61.1%	126	406.5%
Snow College	44	47	79	74	125	126	395	341	-54	-13.7%	262	331.6%
Dixie State University	344	316	299	288	390	594	709	763	54	7.6%	464	155.2%
Utah Valley University	85	113	178	204	331	352	3,567	2,765	-802	-22.5%	2,587	1453.4%
Salt Lake Community College	646	640	900	2,670	2,433	1,533	1,665	2,084	419	25.2%	1,184	131.6%
Total Certificates & Awards	1,805	1,905	2,228	4,083	4,274	3,928	8,150	7,935	-215	-2.6%	5,707	256.1%
Associate												
Utah State University	1,000	1,272	1,252	1,451	1,346	1,100	1,209	1,203	-6	-0.5%	-49	-3.9%
Weber State University	1,994	2,216	2,245	2,361	2,473	2,670	2,678	3,079	401	15.0%	834	37.1%
Southern Utah University	337	294	532	641	821	906	963	756	-207	-21.5%	224	42.1%
Snow College	694	801	864	929	910	979	1,010	1,019	9	0.9%	155	17.9%
Dixie State University	1,150	1,013	974	923	894	901	863	781	-82	-9.5%	-193	-19.8%
Utah Valley University	2,280	1,996	1,929	1,784	2,336	2,231	2,352	5,538	3,186	135.5%	3,609	187.1%
Salt Lake Community College	3,782	3,382	3,687	3,762	3,251	3,220	3,393	3,436	43	1.3%	-251	-6.8%
Total Associate	11,237	10,974	11,483	11,851	12,031	12,007	12,468	15,812	3,344	26.8%	4,329	37.7%
Baccalaureate												
University of Utah	5,092	5,246	5,167	5,214	5,263	5,237	5,310	5,437	127	2.4%	270	5.2%
Utah State University	3,548	3,551	3,810	3,846	3,952	4,531	4,411	4,341	-70	-1.6%	531	13.9%
Weber State University	2,349	2,505	2,488	2,458	2,414	2,451	2,603	2,700	97	3.7%	212	8.5%
Southern Utah University	954	928	895	1,043	961	1,157	1,210	1,311	101	8.3%	416	46.5%
Snow College	7	8	25	17	20	37	29	29	0	0.0%	4	16.0%
Dixie State University	509	612	646	724	750	814	936	1,090	154	16.5%	444	68.7%
Utah Valley University	2,825	2,915	2,903	2,940	3,224	3,471	3,713	3,996	283	7.6%	1,093	37.7%
Total Baccalaureate	15,284	15,765	15,934	16,242	16,584	17,698	18,212	18,904	692	3.8%	2,970	18.6%
Masters												
University of Utah	1,823	1,948	1,901	2,140	2,155	2,198	2,296	2,283	-13	-0.6%	382	20.1%
Utah State University	927	904	830	838	979	839	837	993	156	18.6%	163	19.6%
Weber State University	272	275	254	262	349	331	333	294	-39	-11.7%	40	15.7%
Southern Utah University	265	302	278	380	412	418	450	511	61	13.6%	233	83.8%
Dixie State University							30	24	-	-	-	-
Utah Valley University	52	58	97	96	193	250	285	292	7	2.5%	195	201.0%
Total Masters	3,339	3,487	3,360	3,716	4,088	4,036	4,231	4,397	166	3.9%	1,037	30.9%
Doctorate												
University of Utah	330	384	331	339	346	376	371	355	-16	-4.3%	24	7.3%
Utah State University	109	102	94	95	99	113	96	93	-3	-3.1%		-1.1%
Total Doctorate	439	486	425	434	445	489	467	448	-19	-4.1%	23	5.4%
First Professional												
University of Utah	381	383	384	451	410	459	496	460	-36	-7.3%	76	19.8%
Utah State University	6	6	8	2	8	5	7	6		-14.3%	-2	-25.0%
Weber State University								12				
Total First Professional	387	389	392	453	418	464	503	478	-25	-5.0%	86	21.9%

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
Source: USHE Completions Data

Table 15.7: Technical College Certificates Awarded

	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021*
Bridgerland	806	912	829	862	918	847	797	906	933	956
Davis	1,310	1,371	1,419	1,646	1,769	1,403	1,299	1,468	1,456	1,436
Dixie	455	258	471	770	781	292	306	370	341	549
Mountainland	1,529	1,636	1,776	2,609	2,194	1,925	1,712	2,178	1,716	2,121
Ogden-Weber	1,022	1,029	1,129	1,240	1,348	891	854	952	882	945
Southwest	145	126	270	211	341	319	371	451	310	430
Tooele	132	99	200	219	228	221	196	222	194	256
Uintah Basin	447	487	877	782	571	522	542	574	568	769
Total	5,846	5,918	6,971	8,339	8,150	6,420	6,077	7,121	6,400	7,462

*Preliminary
Source: Utah System of Higher Education

Table 15.8: History of Fall End-of-Term* Enrollment at Public Degree-Granting Institutions in Utah

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021*
Student Headcount										
University of Utah	33,294	32,767	32,006	32,155	32,451	33,153	33,369	33,152	33,273	34,462
Utah State University1	29,667	28,690	28,675	29,288	28,921	28,953	29,292	29,093	29,252	27,426
Weber State University	27,381	25,886	26,913	26,252	27,236	28,379	28,700	29,969	29,709	29,774
Southern Utah University	8,706	8,227	8,200	9,145	9,598	10,245	10,772	12,210	12,998	13,611
Snow College	4,598	4,581	4,805	5,107	5,414	5,589	5,574	5,450	5,875	6,106
Dixie State University	8,587	8,147	8,342	8,464	8,991	9,707	9,986	11,177	12,005	12,266
Utah Valley University	31,810	30,880	31,589	33,565	35,126	37,785	40,471	42,030	41,888	41,262
Salt Lake Community College	35,799	35,043	33,432	31,116	32,114	32,249	30,922	30,782	28,536	27,225
Total	179,842	174,221	173,962	175,092	179,851	186,060	189,086	193,863	193,536	192,132
Full-Time Equivalent										
University of Utah	27,576	27,314	27,015	27,187	27,683	28,188	28,594	28,629	28,801	30,089
Utah State University1	21,136	20,674	21,286	22,415	22,455	22,813	23,153	22,899	22,919	21,534
Weber State University	16,781	15,742	16,133	16,108	16,557	17,221	17,465	18,022	18,223	18,084
Southern Utah University	6,652	6,331	6,277	7,025	7,396	7,761	8,268	8,758	9,574	10,075
Snow College	3,556	3,530	3,777	3,982	4,041	4,097	4,022	3,931	4,138	4,452
Dixie State University	6,443	6,175	6,318	6,377	6,851	7,398	7,539	8,146	8,884	8,994
Utah Valley University	21,692	20,780	21,402	22,693	23,761	25,198	26,770	27,636	27,542	26,790
Salt Lake Community College	18,348	17,676	16,898	16,045	15,905	16,297	15,621	15,544	14,566	13,699
Total	122,184	118,221	119,106	121,831	124,648	128,973	131,431	133,565	134,648	133,715

*Estimate
Source: Utah System of Higher Education

Table 15.9: Public Degree-Granting Institutions in Utah Total Degrees and Awards by Instructional Program, 2020–2021

Classification of Instructional Program (CIP)	U of U	USU	WSU	SUU	SNOW	DSU	UVU	SLCC	TOTAL
AGRICULTURAL/ANIMAL/PLANT/VETERINARY SCIENCE AND RELATED FIELDS.		268		23	27				318
ARCHITECTURE AND RELATED SERVICES.	72	21	15					19	127
AREA, ETHNIC, CULTURAL, GENDER, AND GROUP STUDIES.	78	45							123
BIOLOGICAL AND BIOMEDICAL SCIENCES.	263	170	95	92	29	60	334	28	1,071
BUSINESS, MANAGEMENT, MARKETING, AND RELATED SUPPORT SERVICES.	1384	817	764	331	108	257	2079	381	6,121
COMMUNICATION, JOURNALISM, AND RELATED PROGRAMS.	350	138	139	104	26	106	203	62	1,128
COMMUNICATIONS TECHNOLOGIES/TECHNICIANS AND SUPPORT SERVICES.							14	169	183
COMPUTER AND INFORMATION SCIENCES AND SUPPORT SERVICES.	709	246	511	37	16	79	644	677	2,919
CONSTRUCTION TRADES.		5	1		5		73	54	138
CULINARY, ENTERTAINMENT, AND PERSONAL SERVICES.		28			22		23	28	101
EDUCATION.	277	542	215	268	58	66	429	68	1,923
ENGINEERING.	773	399	68	32	60	20	144	48	1,544
ENGINEERING/ENGINEERING-RELATED TECHNOLOGIES/ TECHNICIANS.	1	618	142	40	1		157	53	1,012
ENGLISH LANGUAGE AND LITERATURE/LETTERS.	123	131	89	29	19	36	87	33	547
FAMILY AND CONSUMER SCIENCES/HUMAN SCIENCES.	142	164	64	82	36		143	4	635
FOREIGN LANGUAGES, LITERATURES, AND LINGUISTICS.	96	31	133	13	8	8	51	28	368
HEALTH PROFESSIONS AND RELATED PROGRAMS.	1082	728	1840	78	389	575	430	679	5,801
HISTORY.	82	56	28	21	9	4	30	8	238
HOMELAND SECURITY, LAW ENFORCEMENT, FIREFIGHTING AND RELATED PROTECTIVE SERVICES.	4	49	142	56	19	55	481	108	914
LEGAL PROFESSIONS AND STUDIES.	153	16		7	2		8	18	204
LIBERAL ARTS AND SCIENCES, GENERAL STUDIES AND HUMANITIES.	242	1038	1614	928	320	1103	5458	2333	13,036
MATHEMATICS AND STATISTICS.	159	63	64	13	3	8	66	7	383
MECHANIC AND REPAIR TECHNOLOGIES/TECHNICIANS.		73	30	2	30		95	98	328
MILITARY TECHNOLOGIES AND APPLIED SCIENCES.							9		9
MULTI/INTERDISCIPLINARY STUDIES.	225	209		73		54	31	2	594
NATURAL RESOURCES AND CONSERVATION.	98	112			16		7	1	234
PARKS, RECREATION, LEISURE, FITNESS, AND KINESIOLOGY.	382	131	46	115	4	69	133	17	897
PHILOSOPHY AND RELIGIOUS STUDIES.	38	26	7	10	1		25		107
PHYSICAL SCIENCES.	235	65	31	22	6	5	65	12	441
PRECISION PRODUCTION.		29			6		9	81	125
PSYCHOLOGY.	466	249	102	76	32	61	413	193	1,592
PUBLIC ADMINISTRATION AND SOCIAL SERVICE PROFESSIONS.	375	160	69	60	9		106	47	826
SCIENCE TECHNOLOGIES/TECHNICIANS.			46					27	73
SOCIAL SCIENCES.	932	634	68	71	17	10	79	101	1,912
TRANSPORTATION AND MATERIALS MOVING.		79		35			330	50	494
VISUAL AND PERFORMING ARTS.	433	122	122	117	111	82	435	86	1,508
TOTAL	9,174	7,462	6,445	2,735	1,389	2,658	12,591	5,520	47,974

Source: Utah System of Higher Education

Table 15.10: History of Enrollment at Technical Colleges in Utah

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021*
Postsecondary Student Headcount										
Bridgerland	4,891	4,253	3,860	3,527	3,741	3,815	3,940	3,793	3,527	3,426
Davis	6,204	5,197	4,923	5,160	4,743	4,604	4,528	4,547	4,733	4,791
Dixie	5,836	6,108	5,693	6,693	7,569	4,333	4,920	6,146	1,998	1,771
Mountainland	2,702	2,375	2,456	2,925	2,868	2,840	2,919	3,442	3,684	4,094
Ogden-Weber	4,066	4,008	3,924	4,221	4,392	4,173	4,257	4,187	4,014	4,380
Southwest	1,035	789	743	669	990	1,452	1,351	1,515	1,214	1,180
Tooele	413	401	563	555	617	661	721	840	763	818
Uintah Basin	5,374	4,440	4,542	3,791	2,870	2,324	2,450	2,356	2,275	1,680
Total	30,521	27,571	26,704	27,541	27,790	24,202	25,086	26,826	22,208	22,140
Secondary Student Headcount										
Bridgerland	1,686	1,737	1,722	1,779	1,968	1,875	2,142	2,031	1,942	1,672
Davis	1,375	1,095	946	1,086	1,264	1,435	1,313	1,464	1,717	1,918
Dixie	843	985	730	951	2,528	301	292	296	169	161
Mountainland	1,349	1,422	1,284	1,259	1,373	1,453	1,501	1,591	1,479	1,468
Ogden-Weber	1,293	1,219	1,028	1,203	1,443	1,327	1,384	1,828	1,869	1,553
Southwest	880	644	798	839	894	856	902	833	890	922
Tooele	31	30	44	86	128	144	147	205	314	365
Uintah Basin	1,399	1,269	1,348	1,449	1,597	1,643	1,703	1,642	1,455	1,498
Total	8,856	8,401	7,900	8,652	11,195	9,034	9,384	9,890	9,835	9,557

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

Table 15.11: Summary of Tuition and Fees for Major Private Institutions

Institution	2013–14	2014–15	2015–16	2016–17	2017–18	2018–19	2019-20	2020-21
Brigham Young University								
LDS Student*	$4,850	$5,000	$5,150	$5,300	$5,460	$5,620	$5,790	$5,970
Non-LDS Student**	$9,700	$10,000	$10,300	$10,600	$10,920	$11,240	$11,580	$11,940
LDS Business College*								
LDS Student*	$3,060	$3,060	$3,160	$3,240	$3,340	$3,440	$3,440	$3,550
Non-LDS Student**	$6,120	$6,120	$6,320	$6,480	$6,680	$6,880	$6,880	$7,100
Westminster College**								
Full-time Rate	$28,992	$29,856	$30,720	$32,104	$32,520	$33,480	$34,984	$37,960

*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: Institution websites
**Source: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS)

Education: Public

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2021 OVERVIEW

Enrollment

In fall 2021, there were 675,247 students in Utah's public education system, an increase of 8,638 students (1.3%) from fall 2020. There were 48,758 kindergarten students, an increase of 1,855 students, or 4.0%, from the previous fall 2020 (46,903). Kindergarten enrollment, which had dropped by more than 1,500 students in the fall of 2020, rebounded this year to levels higher than in 2019.

Student transfers from public school to homeschool grew from 914 in the fall of 2019 to 3,375 in 2020. That number fell to 1,227 in fall 2021. Enrollment in online-only public schools remained virtually unchanged: 26,605 students in 2020 and 26,711 in 2021.

Although Utah's student population is primarily White (72.4%), it is becoming more diverse. In fall 2021, 18.7% of Utah's student body was Hispanic or Latino, 1.6% was Asian, 1.6 % was Pacific Islander, 0.9% was American Indian and Alaska Native, 1.3% was African American or Black, and the remaining students (3.3%) identified with multiple ethnicities. According to the 2017 state population projections, within the school-age population (5 to 17 years of age) individuals identifying as non-White will grow from 25% in 2015 to 42% in 2065.

In 2021, there were 114 operating charter schools in Utah. Charter schools are authorized by the Utah State Charter School Board, school districts, and public universities. Charter schools are educating 77,786 students, about 11.5% of all Utah students in public schools.

Transportation

In fall 2020, the state's 3,222 school buses transported 132,562 students (approximately 30% of students) 27,627,685 miles to and from school.

Construction

In 2021, the Utah State Board of Education issued 77 construction project numbers to 17 school districts and 12 charter schools located throughout the state. These construction projects include new or replacement schools composed of 3 high schools, 3 junior high/middle schools, 10 elementary schools and 5 charter schools.

Finances

In fiscal year 2018, the most recent year for which National Center for Education Statistics data are available by state, Utah's net current expenditure per pupil was $7,576 (the nation's lowest). Net current expenditures do not include capital spending. Including capital spending raises total expenditure per pupil for fiscal year 2018 to $9,333.

However, some consider current expenditure as a percent of total personal income as a better measure of Utah's effort to fund public education. Using this measure, Utah ranks 36th nationally, at 3.5% of personal income. Utah's per pupil net current expenditures for fiscal year 2021 was $9,147.

For fiscal year 2022, the Legislature appropriated funds for a $213 increase (5.9%) in the value of the Weighted Pupil Unit (WPU), increasing it from $3,596 to $3,809 for fiscal year 2022. The cost of the Basic School Program is estimated to be $3,482,094,900. Of these funds $628,364,800 is projected to come from local property tax revenues and $2,853,730,100 is projected to come from state income tax revenues.

Achievement

In 2021, Utah ranked 27th in the nation with an ACT Average Composite Score of 20.6. In 2021, the test was taken by 87% of eligible Utah high school students.

In 2021, the four-year cohort high school graduation rate was 88.1%, compared to 88.2% in 2020. However, because the 2021 cohort was larger, 1,233 more students graduated in 2021.

In 2021, Utah's pupil-teacher ratio was 21.1, which is a 2.3% decrease compared with the previous year's ratio.

A total of 46,153 Utah students earned 341,224 hours of college credit in 2021 through Utah's concurrent enrollment program. This total represents a 4.8% increase in students over 2019-2020. Ninety-five percent of the credits attempted are passed.

A total of 27,255 Utah public school students took 40,213 Advanced Placement (AP) exams in 2021 with 26,166 earning a score of 3 or better (a 65% pass rate, scoring high enough for students to earn college credit). Nationally, the pass rate at public schools is 54%.

Utah has 15 schools involved in the International Baccalaureate (IB) program; 3 Primary Year Programs; 3 Middle Year Programs; 9 Diploma Year Programs. There are 4,319 students total among those schools, accounting for 140 diplomas.

285 Utah schools—or 26.0% of Utah schools—offer dual immersion programs in French, German, Mandarin Chinese, Russian, Portuguese, Arabic, and Spanish.

2022–2023 OUTLOOK

Enrollment

For the 2023 school year, total enrollment in Utah's public education system is forecasted to increase by 3,680 students (0.5%) to 678,927. The cost for this projected increase is estimated at $3,630,500 one-time and $23,614,000 ongoing.

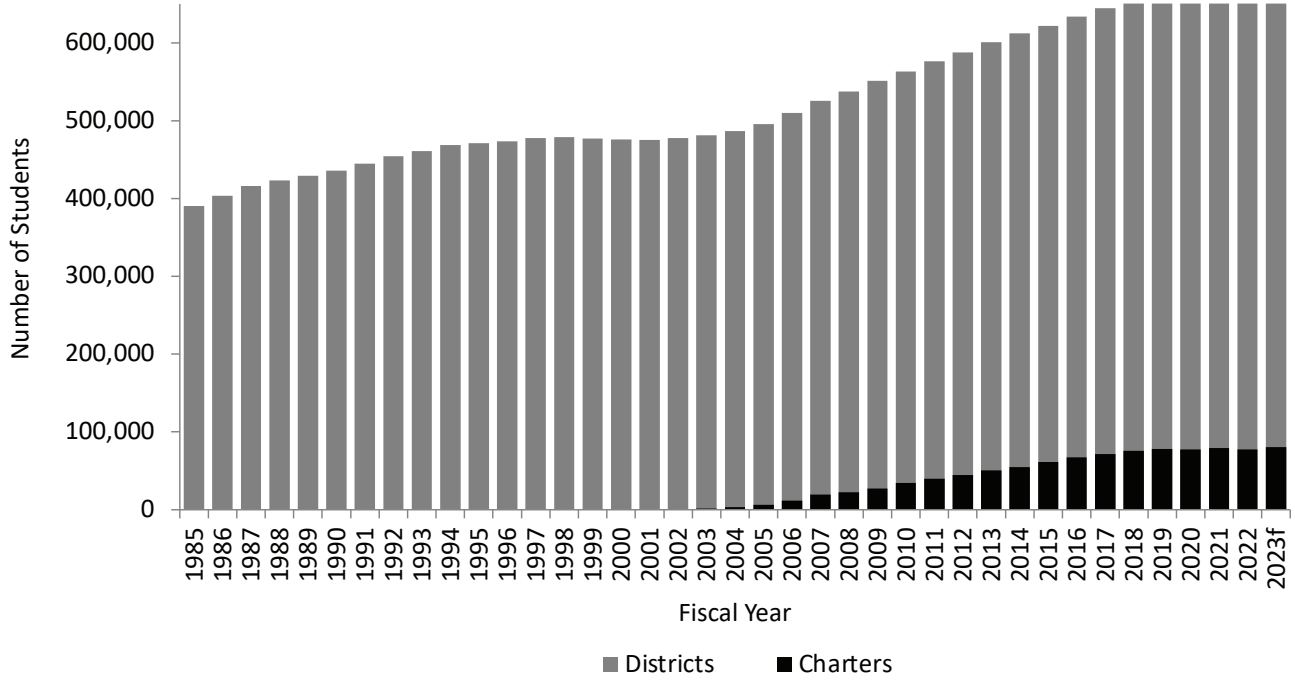
In most of the past five school years, the incoming kindergarten class was smaller than in the prior year. This change corresponds to a declining number of total births five years prior. Based on birth trends, declining kindergarten cohort size is expected to continue.

Utah's charter school enrollment has increased by approximately 0.8% per year, on average, over the last four years. It is forecasted that enrollment in charter schools in Utah will grow by 3.4% in the fall of 2022.

Impacts of COVID-19

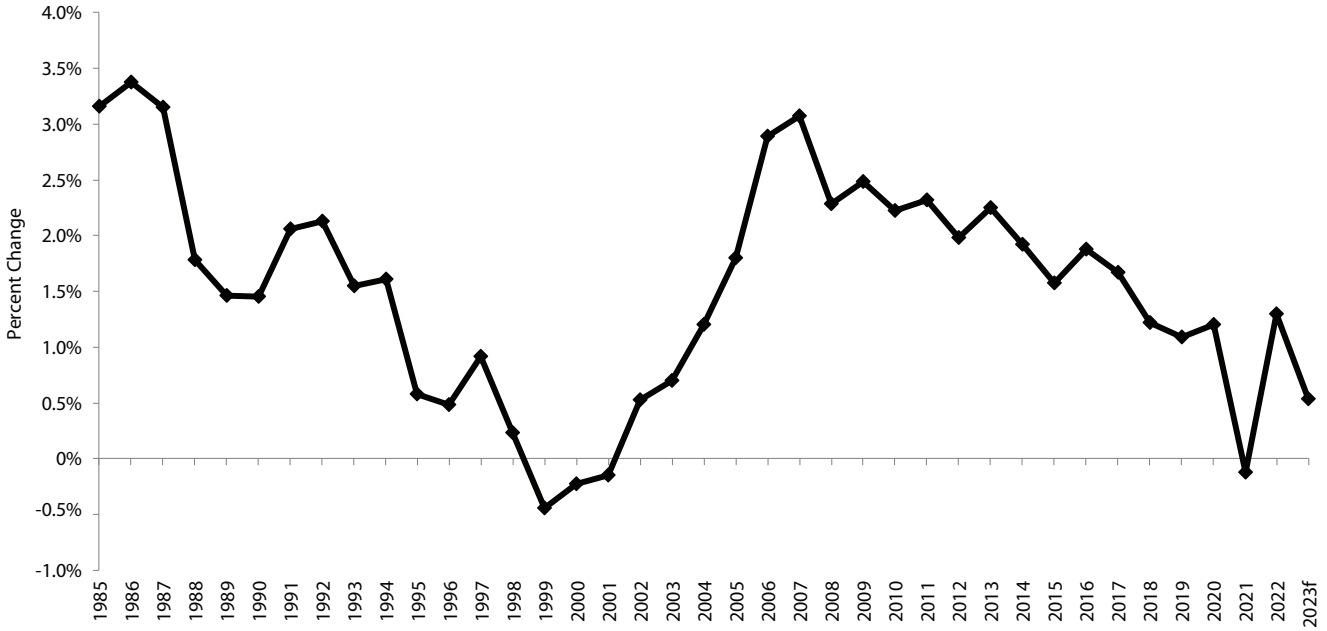
The direct and indirect impacts of the COVID-19 pandemic on public education, and their effects on different student groups, are still unfolding. School districts continue to use a virtual component to varying degrees. Schools and health departments continue to work to make schools a safe environment in which all students can learn and succeed.

Figure 16.1: Utah Public Education Enrollment, FY 1985–FY 2023f



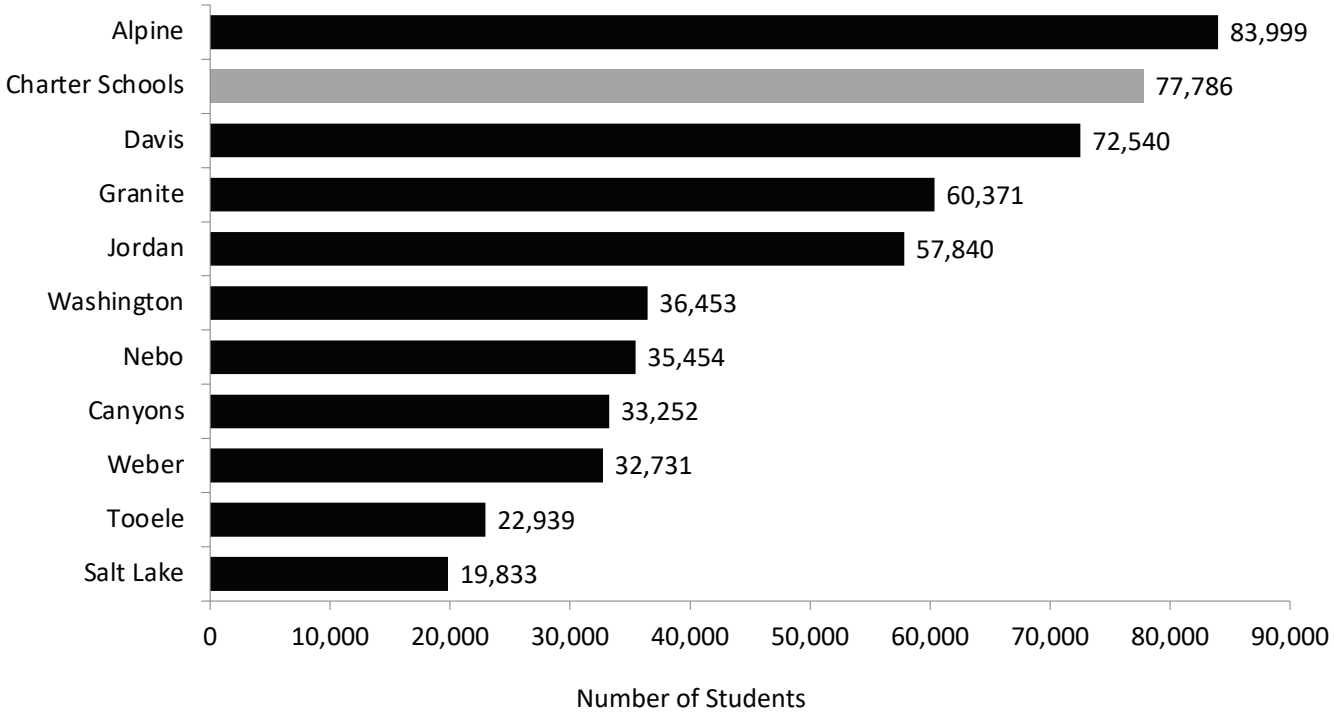
Note: f = forecast
Source: Utah State Board of Education, School Finance & Data and Statistics

Figure 16.2: Percent Change in Public Education Enrollment, FY 1985–FY 2023f



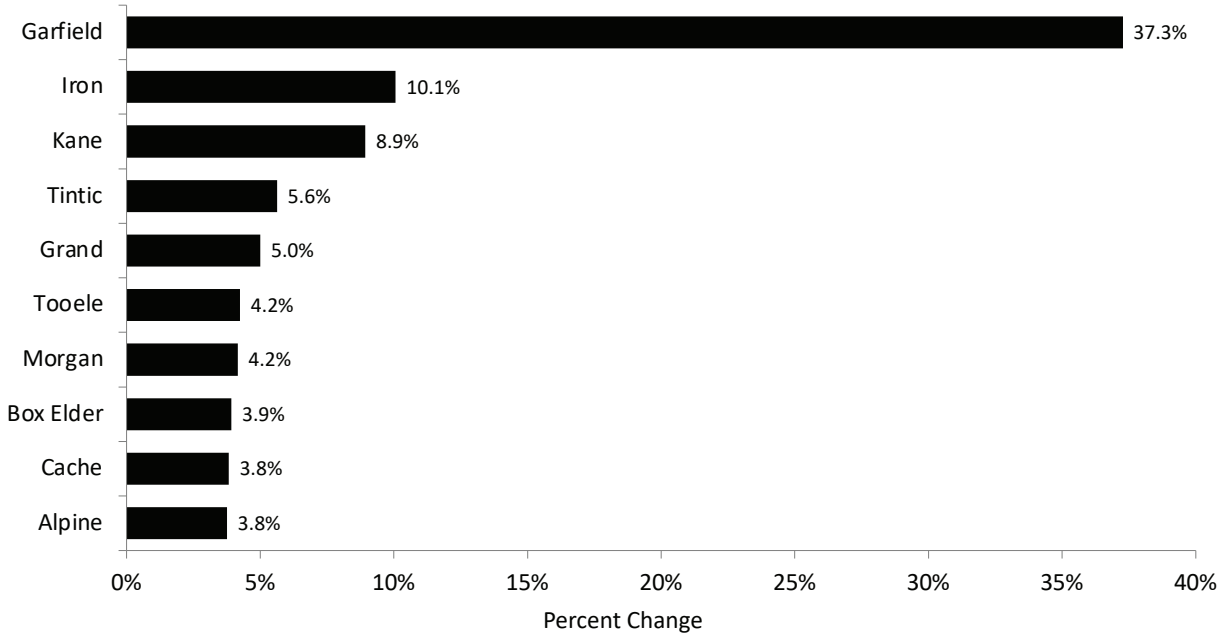
Note: f = forecast
Source: Utah State Board of Education, School Finance & Data and Statistics

Figure 16.3: Largest Enrollment by District, FY 2022



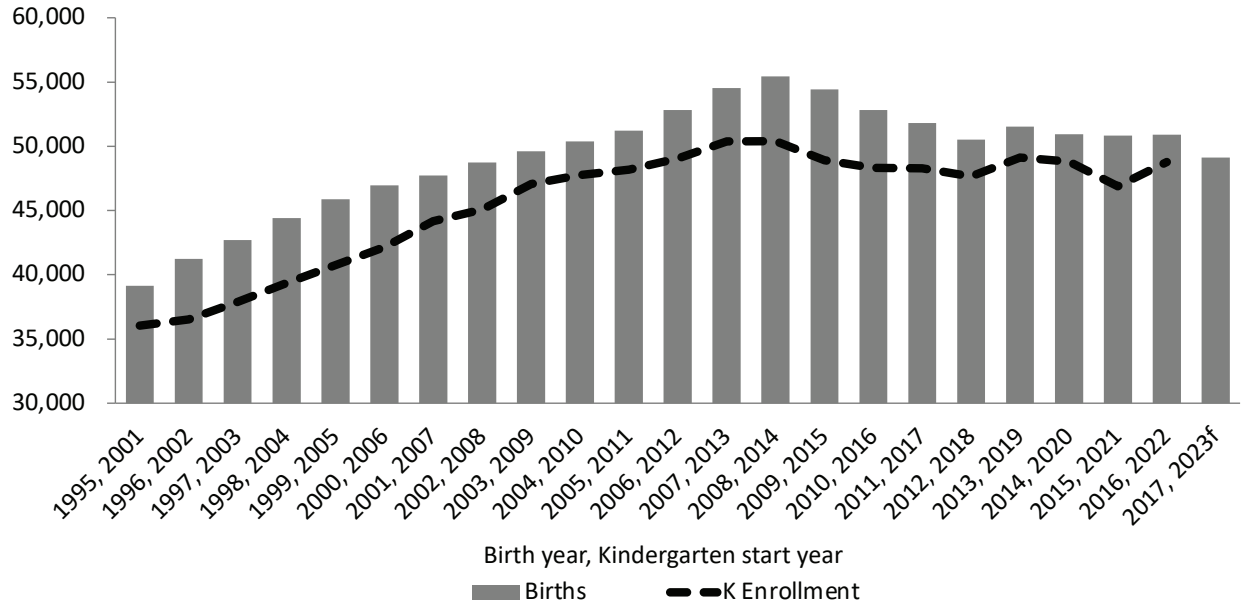
Source: Utah State Board of Education, School Finance & Data and Statistics

Figure 16.4: Largest Enrollment Growth by District FY 2021–FY 2022



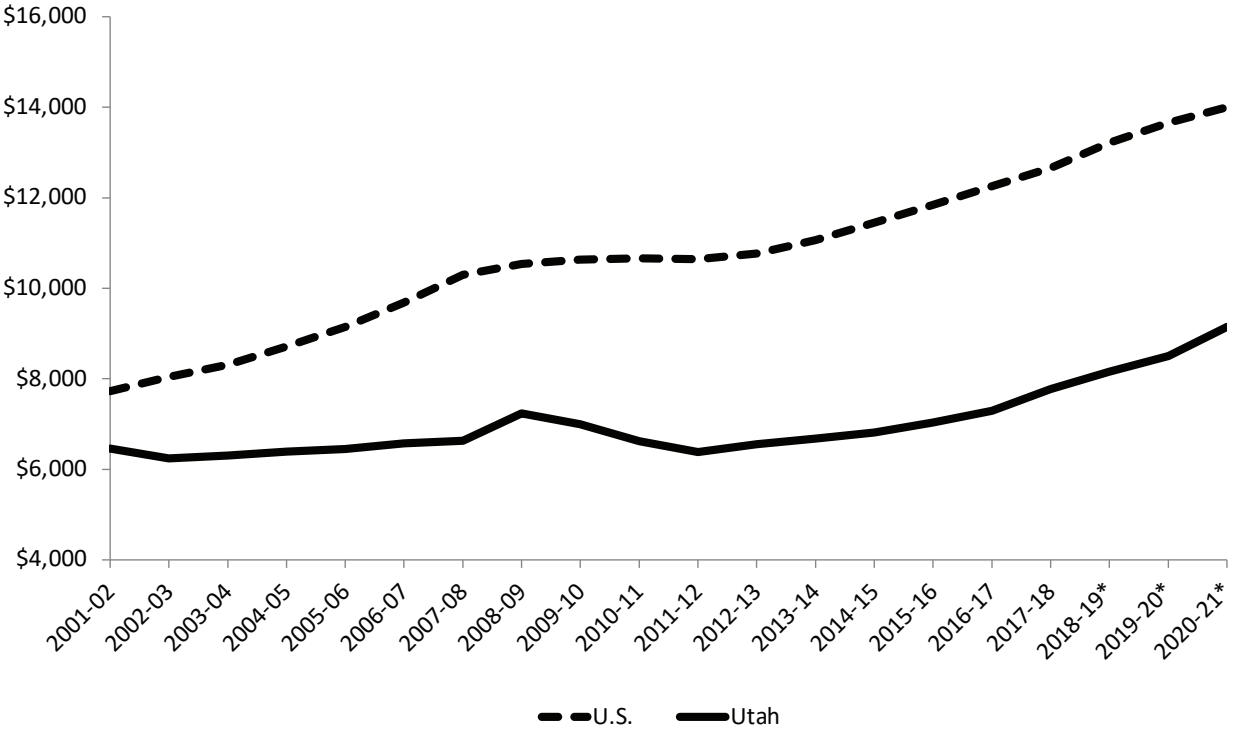
Source: Utah State Board of Education, School Finance & Data and Statistics
Note: Due to the COVID pandemic, there were uncommon changes in enrollment whereby some Districts showed dramatic growth and others dramatic losses. Therefore, enrollment growth by District from FY21 to FY22 is not likely indicative of any forecasted trend.

Figure 16.5: Kindergarten Enrollment and Five Years Prior Births, 2001–2023f



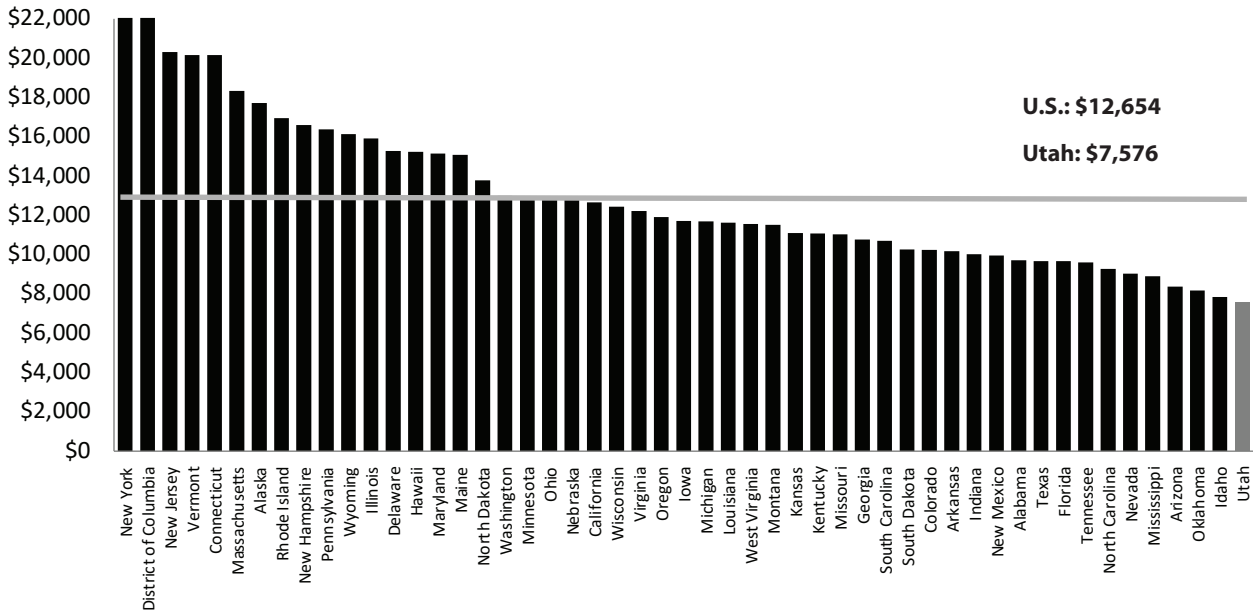
Source: Utah State Board of Education - School Finance & Data and Statistics, Interagency Common Data Committee, and Utah Department of Health

Figure 16.6: U.S. FY 2021 Projection & Utah Current Expenditures per Pupil in Enrollment, FY 2002–FY 2021



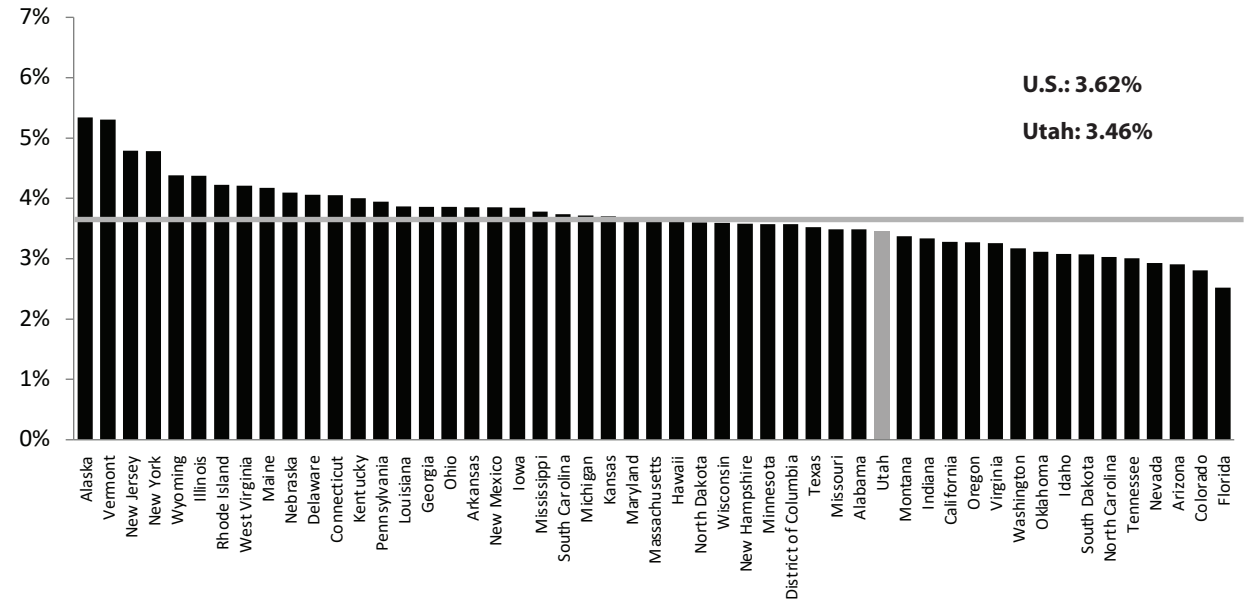
Note: U.S. expenditures are in constant 2019-20 dollars based on the Consumer Price Index adjusted to a school-year basis.
For Fiscal Years 2019-2021*, U.S. data is projected at time of publication.
Source: USBE, School Finance, and U.S. Department of Education, National Center for Education Statistics

Figure 16.7: Current Expenditures per Pupil by State, FY 2018



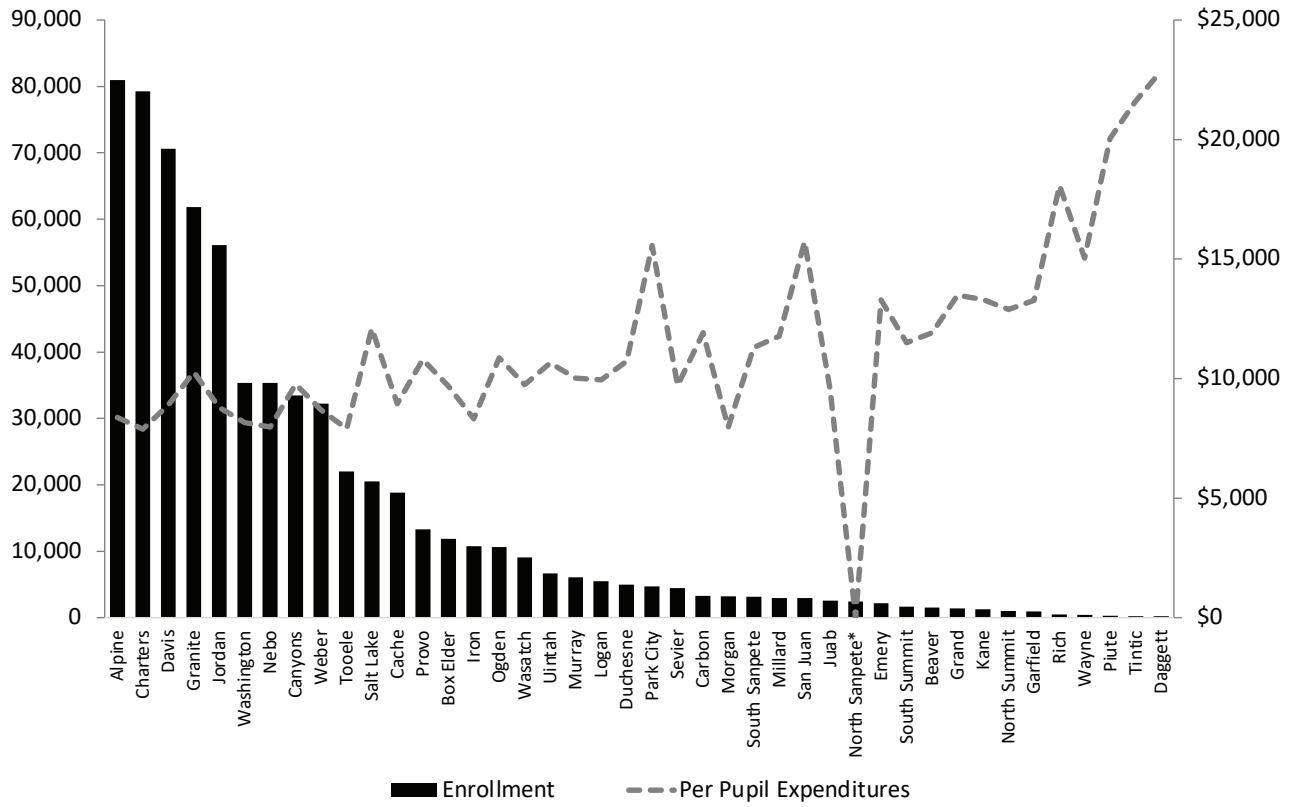
Source: USBE, School Finance, and U.S. Department of Education, National Center for Education Statistics

Figure 16.8: Current Expenditures as a Percentage of Personal Income by State, FY 2018



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

Figure 16.9: Utah Total Enrollment and Current Expenditures per Pupil by District, FY 2021



* LEA has yet to submit financial data to USBE
Source: USBE, School Finance

Table 16.1: 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%	2,772,667	41,107	1.5%	20.8%
2011	587,745	11,410	2.0%	2,822,091	49,424	1.8%	20.8%
2012	600,985	13,240	2.3%	2,867,404	45,313	1.6%	21.0%
2013	612,551	11,566	1.9%	2,906,022	38,618	1.3%	21.1%
2014	622,182	9,631	1.6%	2,946,989	40,967	1.4%	21.1%
2015	633,896	11,714	1.9%	3,003,792	56,803	1.9%	21.1%
2016	644,476	10,580	1.7%	3,062,384	58,592	2.0%	21.0%
2017	652,347	7,871	1.2%	3,122,477	60,093	2.0%	20.9%
2018	659,438	7,091	1.1%	3,176,342	53,865	1.7%	20.8%
2019	667,403	7,965	1.2%	3,231,108	54,766	1.7%	20.7%
2020	666,609	-794	-0.1%	3,284,823	53,715	1.7%	20.3%
2021	675,247	8,638	1.3%	3,343,552	58,729	1.8%	20.2%
2022f	678,927	3,680	0.5%	3,403,190	59,638	1.8%	19.9%

Note: f = forecast

Source: Utah State Board of Education (enrollment counts). Interagency Common Data Committee, (2022 enrollment forecast). Kem C. Gardner Policy Institute Population Estimates (State Population) and 2020-2060 State and County Projections (2022 Forecast)

Table 16.2: Fall Enrollment by District

	FY2019 10/1/18	FY2020 10/1/19	FY2021 10/1/20	FY2022 10/1/21	FY2023f 10/1/22f	Total Annual Change				Percent Change				FY2022 Rank		
						FY19-20	FY20-21	FY21-22	FY22-23f	FY19-20	FY20-21	FY21-22	FY22-23	Size	Total Annual Change	Percent Change
Alpine	79,748	81,532	80,953	83,999	85,200	1,784	-579	3,046	1,201	2.2%	-0.7%	3.8%	1.4%	1	1	10
Beaver	1,527	1,524	1,519	1,528	1,540	-3	-5	9	12	-0.2%	-0.3%	0.6%	0.8%	33	29	28
Box Elder	11,770	11,914	11,832	12,296	12,510	144	-82	464	214	1.2%	-0.7%	3.9%	1.7%	14	9	8
Cache	18,270	18,802	18,833	19,554	19,950	532	31	721	396	2.9%	0.2%	3.8%	2.0%	12	7	9
Canyons	34,134	34,178	33,488	33,252	32,600	44	-690	-236	-652	0.1%	-2.0%	-0.7%	-2.0%	8	38	31
Carbon	3,484	3,472	3,289	3,362	3,325	-12	-183	73	-37	-0.3%	-5.3%	2.2%	-1.1%	24	21	23
Daggett	178	189	187	187	187	11	-2	0	0	6.2%	-1.1%	0.0%	0.0%	42	30	30
Davis	72,263	72,897	70,643	72,540	71,950	634	-2,254	1,897	-590	0.9%	-3.1%	2.7%	-0.8%	3	2	18
Duchesne	5,142	5,164	4,987	5,133	5,133	22	-177	146	0	0.4%	-3.4%	2.9%	0.0%	21	13	16
Emery	2,181	2,141	2,172	2,136	2,136	-40	31	-36	0	-1.8%	1.4%	-1.7%	0.0%	31	32	33
Garfield	899	899	923	1,267	1,267	0	24	344	0	0.0%	2.7%	37.3%	0.0%	36	10	1
Grand	1,520	1,498	1,379	1,448	1,488	-22	-119	69	40	-1.4%	-7.9%	5.0%	2.8%	34	22	5
Granite	64,281	63,989	61,851	60,371	59,094	-292	-2,138	-1,480	-1,277	-0.5%	-3.3%	-2.4%	-2.1%	4	42	38
Iron	9,395	9,544	10,748	11,830	12,330	149	1,204	1,082	500	1.6%	12.6%	10.1%	4.2%	15	5	2
Jordan	54,865	56,339	56,102	57,840	56,900	1,474	-237	1,738	-940	2.7%	-0.4%	3.1%	-1.6%	5	3	15
Juab	2,587	2,655	2,590	2,676	2,698	68	-65	86	22	2.6%	-2.4%	3.3%	0.8%	29	19	13
Kane	1,269	1,275	1,287	1,402	1,450	6	12	115	48	0.5%	0.9%	8.9%	3.4%	35	16	3
Logan	5,569	5,420	5,484	5,278	5,324	-149	64	-206	46	-2.7%	1.2%	-3.8%	0.9%	20	37	42
Millard	2,916	2,973	2,973	3,074	3,074	57	0	101	0	2.0%	0.0%	3.4%	0.0%	27	18	12
Morgan	3,178	3,194	3,201	3,334	3,365	16	7	133	31	0.5%	0.2%	4.2%	0.9%	25	14	7
Murray	6,264	6,425	6,097	5,991	5,877	161	-328	-106	-114	2.6%	-5.1%	-1.7%	-1.9%	19	35	35
Nebo	33,117	33,379	35,335	35,454	36,143	262	1,956	119	689	0.8%	5.9%	0.3%	1.9%	7	15	29
North Sanpete	2,471	2,507	2,445	2,531	2,591	36	-62	86	60	1.5%	-2.5%	3.5%	2.4%	30	19	11
North Summit	1,044	1,014	1,011	1,027	1,015	-30	-3	16	-12	-2.9%	-0.3%	1.6%	-1.2%	37	25	26
Ogden	11,553	11,460	10,617	10,475	10,468	-93	-843	-142	-7	-0.8%	-7.4%	-1.3%	-0.1%	16	36	32
Park City	4,780	4,757	4,696	4,592	4,517	-23	-61	-104	-75	-0.5%	-1.3%	-2.2%	-1.6%	22	34	37
Piute	273	279	291	283	283	6	12	-8	0	2.2%	4.3%	-2.7%	0.0%	40	31	39
Provo	16,165	16,603	13,317	13,623	13,700	438	-3,286	306	77	2.7%	-19.8%	2.3%	0.6%	13	11	21
Rich	507	498	498	510	515	-9	0	12	5	-1.8%	0.0%	2.4%	1.0%	38	26	19
Salt Lake	22,401	22,017	20,536	19,833	19,300	-384	-1,481	-703	-533	-1.7%	-6.7%	-3.4%	-2.7%	11	40	40
San Juan	2,876	2,891	2,929	2,880	2,838	15	38	-49	-42	0.5%	1.3%	-1.7%	-1.5%	28	33	34
Sevier	4,538	4,548	4,461	4,567	4,590	10	-87	106	23	0.2%	-1.9%	2.4%	0.5%	23	17	20
South Sanpete	3,268	3,230	3,127	3,194	3,234	-38	-103	67	40	-1.2%	-3.2%	2.1%	1.3%	26	23	24
South Summit	1,694	1,701	1,635	1,654	1,609	7	-66	19	-45	0.4%	-3.9%	1.2%	-2.7%	32	24	27
Tintic	226	214	213	225	232	-12		12	7	-5.3%	-0.5%	5.6%	3.1%	41	26	4
Tooele	16,903	17,608	22,004	22,939	23,400	705	4,396	935	461	4.2%	25.0%	4.2%	2.0%	10	6	6
Uintah	7,069	6,989	6,668	6,820	6,913	-80	-321	152	93	-1.1%	-4.6%	2.3%	1.4%	18	12	22
Wasatch	7,040	7,146	9,061	8,731	8,928	106	1,915	-330	197	1.5%	26.8%	-3.6%	2.3%	17	39	41
Washington	31,074	33,884	35,346	36,453	37,500	2,810	1,462	1,107	1,047	9.0%	4.3%	3.1%	2.9%	6	4	14
Wayne	444	436	429	441	454	-8	-7	12	13	-1.8%	-1.6%	2.8%	2.9%	39	26	17
Weber	32,171	32,588	32,197	32,731	32,840	417	-391	534	109	1.3%	-1.2%	1.7%	0.3%	9	8	25
Charter Schools	78,384	77,630	79,255	77,786	80,459	-754	1,625	-1,469	2,673	-1.0%	2.1%	-1.9%	3.4%	2	41	36
State of Utah	659,438	667,403	666,609	675,247	678,927	7,965	-794	8,638	3,680	1.2%	-0.1%	1.3%	0.5%			

Source: Utah State Board of Education, Data and Statistics

Table 16.3: Utah Public Education Enrollment by Race and Ethnicity

	FY2022 Enrollment 10/1/21	African American or Black		American Indian		Asian		Hispanic/Latino		Pacific Islander		Two or More Races		White	
		Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
State of Utah	675,247	9,000	1.3%	6,385	0.9%	11,090	1.6%	126,558	18.7%	10,916	1.6%	22,454	3.3%	488,844	72.4%
Alpine	83,999	589	0.7%	250	0.3%	719	0.9%	11,131	13.3%	1,207	1.4%	3,603	4.3%	66,500	79.2%
Beaver	1,528	4	0.3%	9	0.6%	4	0.3%	285	18.7%	11	0.7%	19	1.2%	1,196	78.3%
Box Elder	12,296	46	0.4%	79	0.6%	44	0.4%	1,454	11.8%	42	0.3%	215	1.7%	10,416	84.7%
Cache	19,554	96	0.5%	145	0.7%	142	0.7%	1,887	9.7%	115	0.6%	436	2.2%	16,733	85.6%
Canyons	33,252	557	1.7%	138	0.4%	863	2.6%	5,878	17.7%	358	1.1%	1,828	5.5%	23,630	71.1%
Carbon	3,362	11	0.3%	31	0.9%	10	0.3%	458	13.6%	5	0.1%	38	1.1%	2,809	83.6%
Daggett	187	0	0.0%	3	1.6%	0	0.0%	6	3.2%	0	0.0%	4	2.1%	174	93.0%
Davis	72,540	797	1.1%	264	0.4%	797	1.1%	8,179	11.3%	916	1.3%	2,305	3.2%	59,282	81.7%
Duchesne	5,133	26	0.5%	287	5.6%	12	0.2%	517	10.1%	13	0.3%	200	3.9%	4,078	79.4%
Emery	2,136	2	0.1%	12	0.6%	2	0.1%	202	9.5%	2	0.1%	17	0.8%	1,899	88.9%
Garfield	1,267	2	0.2%	35	2.8%	4	0.3%	120	9.5%	5	0.4%	20	1.6%	1,081	85.3%
Grand	1,448	3	0.2%	88	6.1%	7	0.5%	298	20.6%	2	0.1%	22	1.5%	1,028	71.0%
Granite	60,371	2,095	3.5%	546	0.9%	2,398	4.0%	23,362	38.7%	2,639	4.4%	1,298	2.2%	28,033	46.4%
Iron	11,830	61	0.5%	193	1.6%	96	0.8%	1,324	11.2%	74	0.6%	259	2.2%	9,823	83.0%
Jordan	57,840	608	1.1%	195	0.3%	990	1.7%	10,187	17.6%	1,148	2.0%	2,598	4.5%	42,114	72.8%
Juab	2,676	7	0.3%	10	0.4%	11	0.4%	163	6.1%	13	0.5%	38	1.4%	2,434	91.0%
Kane	1,402	7	0.5%	25	1.8%	9	0.6%	92	6.6%	0	0.0%	31	2.2%	1,238	88.3%
Logan	5,278	136	2.6%	70	1.3%	137	2.6%	1,736	32.9%	110	2.1%	118	2.2%	2,971	56.3%
Millard	3,074	7	0.2%	25	0.8%	22	0.7%	500	16.3%	1	0.0%	64	2.1%	2,455	79.9%
Morgan	3,334	13	0.4%	8	0.2%	6	0.2%	99	3.0%	5	0.1%	48	1.4%	3,155	94.6%
Murray	5,991	219	3.7%	54	0.9%	112	1.9%	1,283	21.4%	83	1.4%	315	5.3%	3,925	65.5%
Nebo	35,454	193	0.5%	101	0.3%	110	0.3%	5,028	14.2%	245	0.7%	1,134	3.2%	28,643	80.8%
North Sanpete	2,531	4	0.2%	27	1.1%	3	0.1%	413	16.3%	16	0.6%	41	1.6%	2,027	80.1%
North Summit	1,027	7	0.7%	3	0.3%	0	0.0%	171	16.7%	0	0.0%	7	0.7%	839	81.7%
Ogden	10,475	159	1.5%	75	0.7%	66	0.6%	5,263	50.2%	59	0.6%	344	3.3%	4,509	43.0%
Park City	4,592	22	0.5%	3	0.1%	65	1.4%	909	19.8%	2	0.0%	157	3.4%	3,434	74.8%
Piute	283	3	1.1%	0	0.0%	0	0.0%	39	13.8%	0	0.0%	5	1.8%	236	83.4%
Provo	13,623	151	1.1%	101	0.7%	226	1.7%	4,071	29.9%	494	3.6%	554	4.1%	8,026	58.9%
Rich	510	0	0.0%	0	0.0%	0	0.0%	25	4.9%	2	0.4%	14	2.7%	469	92.0%
Salt Lake	19,833	945	4.8%	272	1.4%	857	4.3%	7,764	39.1%	1,004	5.1%	858	4.3%	8,133	41.0%
San Juan	2,880	8	0.3%	1,560	54.2%	3	0.1%	188	6.5%	1	0.0%	68	2.4%	1,052	36.5%
Sevier	4,567	30	0.7%	92	2.0%	11	0.2%	247	5.4%	34	0.7%	0	0.0%	4,153	90.9%
South Sanpete	3,194	15	0.5%	16	0.5%	5	0.2%	412	12.9%	26	0.8%	66	2.1%	2,654	83.1%
South Summit	1,654	2	0.1%	3	0.2%	2	0.1%	221	13.4%	2	0.1%	11	0.7%	1,413	85.4%
Tintic	225	1	0.4%	0	0.0%	1	0.4%	19	8.4%	0	0.0%	7	3.1%	197	87.6%
Tooele	22,939	161	0.7%	132	0.6%	142	0.6%	3,013	13.1%	300	1.3%	623	2.7%	18,568	80.9%
Uintah	6,820	31	0.5%	518	7.6%	24	0.4%	666	9.8%	25	0.4%	178	2.6%	5,378	78.9%
Wasatch	8,731	32	0.4%	14	0.2%	34	0.4%	1,551	17.8%	25	0.3%	205	2.3%	6,870	78.7%
Washington	36,453	391	1.1%	446	1.2%	378	1.0%	5,452	15.0%	542	1.5%	760	2.1%	28,484	78.1%
Wayne	441	1	0.2%	3	0.7%	4	0.9%	46	10.4%	1	0.2%	11	2.5%	375	85.0%
Weber	32,731	278	0.8%	96	0.3%	292	0.9%	4,490	13.7%	236	0.7%	925	2.8%	26,414	80.7%
Charter Schools	77,786	1,280	1.6%	456	0.6%	2,482	3.2%	17,409	22.4%	1,153	1.5%	3,010	3.9%	51,996	66.8%

Source: Utah State Board of Education, Data and Statistics

Table 16.4: Statewide Selected Data

School District	FY21 Per Pupil Current Expenditures	Rank	Class of 2021 Graduation Rate	Rank	FY21 Pupil-Teacher Ratio	Rank	FY21 Share of Free and Reduced Students	Rank
State of Utah	$9,147		88%		21.1		28.7%	
Alpine	8,383	35	91%	17	24.1	2	17.7%	39
Beaver	11,923	15	94%	9	19.0	21	39.4%	17
Box Elder	9,698	29	87%	30	21.1	10	28.3%	27
Cache	8,951	31	95%	7	22.5	8	22.5%	34
Canyons	9,762	26	89%	24	21.0	13	25.9%	30
Carbon	11,924	14	86%	33	18.0	28	42.2%	12
Daggett	22,866	1	96%	4	9.4	42	18.3%	37
Davis	8,896	32	91%	17	22.5	7	18.5%	36
Duchesne	10,731	21	83%	36	18.4	26	40.2%	14
Emery	13,291	10	89%	24	17.1	33	50.8%	5
Garfield	13,266	11	88%	28	15.0	35	38.0%	19
Grand	13,495	8	79%	39	14.6	37	42.6%	11
Granite	10,276	23	77%	41	20.7	17	44.4%	9
Iron	8,326	36	91%	17	23.3	5	40.2%	14
Jordan	8,793	33	89%	24	20.9	15	17.4%	40
Juab	9,553	30	98%	2	21.1	11	31.1%	24
Kane	13,302	9	96%	4	18.6	24	33.9%	22
Logan	9,952	25	88%	28	20.9	14	48.6%	6
Millard	11,769	16	89%	24	18.8	23	46.2%	8
Morgan	7,954	39	93%	13	20.8	16	9.9%	42
Murray	10,019	24	78%	40	19.9	20	28.0%	28
Nebo	7,980	38	94%	9	23.4	3	22.7%	32
No. Sanpete*	-	42	86%	33	20.3	18	51.0%	4
No. Summit	12,895	12	93%	13	17.2	31	20.8%	35
Ogden	10,870	19	82%	37	18.0	30	67.8%	2
Park City	15,564	6	94%	9	14.8	36	18.3%	37
Piute	20,042	3	96%	4	11.5	40	58.7%	3
Provo	10,794	20	91%	17	18.6	25	38.1%	18
Rich	18,080	4	100%	1	14.4	38	29.2%	26
Salt Lake	12,095	13	82%	37	18.0	29	46.8%	7
San Juan	15,733	5	91%	17	16.6	34	73.4%	1
Sevier	9,710	28	85%	35	20.3	19	38.0%	19
So. Sanpete	11,295	18	93%	13	18.2	27	40.8%	13
So. Summit	11,492	17	95%	7	17.2	32	15.8%	41
Tintic	21,605	2	94%	9	10.5	41	33.7%	23
Tooele	7,905	40	77%	41	29.7	1	27.1%	29
Uintah	10,657	22	87%	30	22.5	6	39.7%	16
Wasatch	9,739	27	90%	22	23.3	4	22.6%	33
Washington	8,158	37	93%	13	22.2	9	36.8%	21
Wayne	15,048	7	97%	3	13.9	39	42.8%	10
Weber	8,674	34	90%	22	21.0	12	23.8%	31
Charter Schools	7,885	41	87%	30	18.9	22	29.9%	25

*LEA has yet to submit financial data to the USBE

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, 2020).

Table 16.5: College Entrance Exam Scores

	Average ACT Scores by State: 2021						
	% of Graduates Tested	Average English Score	Average Mathematic Score	Average Reading Score	Average Science Score	Average Composite Score	Rank
United States	35	19.6	19.9	20.9	20.4	20.3	
Alabama	100	18.4	18.0	19.2	18.8	18.7	46
Alaska	16	19.4	20.5	21.6	20.6	20.6	27
Arizona	35	18.6	19.8	20.3	19.9	19.8	37
Arkansas	99	18.6	18.3	19.3	19.2	19.0	44
California	5	26.2	25.6	26.6	25.5	26.1	5
Colorado	16	23.3	23.0	24.3	23.4	23.6	17
Connecticut	9	27.5	26.2	28.0	26.4	27.2	2
Delaware	5	25.9	24.5	27.0	25.0	25.7	7
District of Columbia	19	25.8	24.5	26.8	25.0	25.6	8
Florida	34	19.9	19.6	21.4	20.1	20.4	31
Georgia	24	22.1	21.9	23.4	22.4	22.6	21
Hawaii	67	16.8	18.1	18.6	18.7	18.2	49
Idaho	16	22.3	22.3	24.1	22.7	23.0	20
Illinois	19	25.3	24.5	25.8	24.6	25.2	12
Indiana	14	22.2	22.8	23.9	22.8	23.1	19
Iowa	47	20.4	20.8	22.4	21.8	21.5	24
Kansas	79	18.9	19.5	20.6	20.2	19.9	36
Kentucky	100	18.7	18.8	19.7	19.3	19.2	42
Louisiana	98	18.1	17.8	18.8	18.6	18.4	48
Maine	2	25.7	24.4	26.8	25.0	25.6	8
Maryland	8	25.7	24.5	26.5	24.9	25.5	10
Massachusetts	7	27.6	26.9	28.4	26.8	27.6	1
Michigan	9	25.1	24.5	25.7	24.6	25.1	13
Minnesota	60	20.2	21.5	22.2	22.0	21.6	22
Mississippi	100	17.5	17.6	18.4	18.3	18.1	50
Missouri	63	19.9	19.9	21.3	20.7	20.6	27
Montana	70	19.2	20.0	21.1	20.7	20.4	31
Nebraska	86	19.1	19.6	20.7	20.2	20.0	34
Nevada	100	16.7	17.7	18.2	18.2	17.8	51
New Hampshire	4	26.5	25.9	27.4	26.1	26.6	3
New Jersey	12	25.3	24.7	25.7	24.4	25.1	13
New Mexico	23	19.7	20.1	21.6	20.9	20.7	26
New York	9	26.1	25.7	27.0	25.9	26.3	4
North Carolina	92	17.3	19.0	19.4	19.3	18.9	45
North Dakota	100	18.2	19.7	20.0	20.1	19.6	40
Ohio	85	18.5	19.5	20.2	19.8	19.6	40
Oklahoma	58	19.1	18.7	20.7	19.8	19.7	39
Oregon	20	19.6	20.3	21.3	20.8	20.6	27
Pennsylvania	7	24.8	24.3	25.8	24.5	25.0	15
Rhode Island	4	25.7	24.8	27.0	25.2	25.8	6
South Carolina	50	17.4	18.4	19.2	18.9	18.6	47
South Dakota	55	20.5	21.2	22.4	21.9	21.6	22
Tennessee	100	18.7	18.5	19.7	19.1	19.1	43
Texas	23	18.9	20.0	20.6	20.3	20.1	33
Utah	86	19.7	20.1	21.3	20.8	20.6	27
Vermont	4	24.2	23.4	26.2	24.5	24.7	16
Virginia	9	25.5	24.5	26.5	25.1	25.5	10
Washington	7	22.9	23.1	24.4	23.4	23.6	17
West Virginia	30	20.6	19.6	21.8	20.8	20.8	25
Wisconsin	96	18.9	19.9	20.3	20.4	20.0	34
Wyoming	91	18.6	19.4	20.7	20.2	19.8	37

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

Table 16.6: Selected Data by State, FY 2018

	Fall 2018 Enrollment	2017-18 Current Expenditures (thousands of dollars)	2017-18 Current Expenditures Per Pupil	Rank	CY 2018 Personal Income (millions of dollars)	Current Exp as % of Personal Income	Rank	Fall 2018 Pupil/ Teacher Ratio	Rank
United States	50,694,061	$639,951,946	$12,654	-	$17,681,159	3.6%	-	16.0	..
Alabama	739,716	7,214,075	9,717	41	207,054	3.5%	35	17.6	42
Alaska	130,963	2,355,261	17,726	7	44,103	5.3%	1	17.1	38
Arizona	1,141,511	9,182,464	8,373	48	315,732	2.9%	49	23.5	51
Arkansas	495,291	5,044,098	10,168	38	130,865	3.9%	18	13.0	11
California	6,272,734	79,838,726	12,664	22	2,431,822	3.3%	39	23.1	50
Colorado	911,536	9,319,502	10,238	37	331,955	2.8%	50	17.2	39
Connecticut	526,634	10,703,917	20,147	5	264,263	4.1%	12	12.3	7
Delaware	138,405	2,082,803	15,282	13	51,310	4.1%	11	14.4	20
District of Columbia	88,493	2,021,822	23,155	2	56,573	3.6%	32	12.1	5
Florida	2,846,444	27,371,046	9,663	43	1,087,189	2.5%	51	17.3	41
Georgia	1,767,202	19,030,988	10,760	34	493,175	3.9%	16	15.1	29
Hawaii	181,278	2,756,317	15,242	14	76,184	3.6%	27	14.9	27
Idaho	310,522	2,363,037	7,846	50	76,681	3.1%	44	18.5	46
Illinois	1,982,327	31,848,886	15,912	12	728,366	4.4%	6	15.0	28
Indiana	1,055,706	10,576,789	10,033	39	316,782	3.3%	38	17.3	40
Iowa	514,833	6,000,945	11,724	26	156,072	3.8%	20	14.5	22
Kansas	497,733	5,515,083	11,095	31	148,956	3.7%	24	13.6	14
Kentucky	677,821	7,546,109	11,081	32	188,362	4.0%	13	16.2	35
Louisiana	711,783	8,321,373	11,636	28	215,112	3.9%	15	18.3	45
Maine	180,461	2,719,621	15,069	16	65,122	4.2%	9	12.0	2
Maryland	896,827	13,543,614	15,155	15	372,197	3.6%	25	14.8	24
Massachusetts	962,297	17,682,658	18,328	6	486,204	3.6%	26	13.0	10
Michigan	1,504,194	17,723,898	11,688	27	476,477	3.7%	23	17.7	43
Minnesota	889,304	11,424,355	12,910	19	319,619	3.6%	31	15.4	31
Mississippi	471,298	4,261,381	8,909	47	112,818	3.8%	21	14.7	23
Missouri	913,441	10,101,337	11,034	33	289,454	3.5%	34	13.3	12
Montana	148,844	1,720,717	11,512	30	50,989	3.4%	37	14.1	17
Nebraska	326,392	4,148,386	12,813	21	101,204	4.1%	10	13.6	15
Nevada	492,640	4,391,673	9,040	46	149,789	2.9%	48	21.2	48
New Hampshire	178,515	2,976,514	16,588	9	83,161	3.6%	30	12.2	6
New Jersey	1,400,069	28,607,598	20,316	3	597,005	4.8%	3	12.0	4
New Mexico	333,537	3,330,970	9,963	40	86,532	3.8%	19	15.8	34
New York	2,700,833	62,984,846	23,686	1	1,316,440	4.8%	4	12.7	8
North Carolina	1,552,497	14,412,683	9,277	45	475,483	3.0%	46	15.5	32
North Dakota	113,845	1,542,633	13,783	17	42,822	3.6%	28	12.0	3
Ohio	1,695,762	21,975,446	12,893	20	569,766	3.9%	17	16.7	37
Oklahoma	698,891	5,681,424	8,174	49	182,574	3.1%	43	16.5	36
Oregon	609,507	6,911,762	11,903	25	211,415	3.3%	40	20.2	47
Pennsylvania	1,730,757	28,279,577	16,377	10	716,337	3.9%	14	14.0	16
Rhode Island	143,436	2,423,529	16,954	8	57,372	4.2%	7	13.3	13
South Carolina	780,882	8,322,870	10,705	35	222,565	3.7%	22	14.8	25
South Dakota	138,975	1,414,542	10,263	36	46,032	3.1%	45	14.1	18
Tennessee	1,007,624	9,618,295	9,599	44	319,949	3.0%	47	15.7	33
Texas	5,433,471	52,233,513	9,670	42	1,483,122	3.5%	33	15.1	30
Utah	677,031	5,062,984	7,576	51	146,326	3.5%	36	22.8	49
Vermont	87,074	1,773,661	20,149	4	33,437	5.3%	2	10.5	1
Virginia	1,289,367	15,786,284	12,224	24	484,937	3.3%	41	14.8	26
Washington	1,123,736	14,418,081	12,985	18	454,257	3.2%	42	18.2	44
West Virginia	267,976	3,150,576	11,572	29	74,778	4.2%	8	14.2	19
Wisconsin	859,333	10,712,520	12,445	23	297,730	3.6%	29	14.4	21
Wyoming	94,313	1,520,759	16,134	11	34,691	4.4%	5	12.9	9

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

Energy

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Michael Vanden Berg, Utah Geological Survey
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OVERVIEW

Heading into 2021, energy experts debated the speed and timing of a return to "normal" energy demand following a tumultuous 2020 and the worldwide response to the onset of the COVID-19 pandemic. As vaccines became widely available in the first half of 2021, optimism grew in the energy economy as demand headed back to pre-pandemic levels. Energy demand increased faster than supply, causing significant run-ups in prices, particularly oil and natural gas, by late summer. However, the onset of new coronavirus variants and lingering questions about the health of the economy resulted in a drop in prices at the end of the year. In addition, the new federal administration emphasized a transition to carbon-neutral energy sources, which has diminished outlooks for future fossil fuel production and utilization in Utah.

Utah crude oil prices steadily increased throughout 2021, until a price drop in early December, and averaged $61 per barrel for the year, the highest price since 2014 and almost double the average price in 2020. This rebound in price, coupled with record-high petroleum demand, resulted in a 13% increase in Utah crude oil production to 34.9 million barrels in 2021. Natural gas prices more than doubled in 2021 to $4 per thousand cubic feet (Mcf); however, higher prices did not translate to higher production. Natural gas production has declined more than 50% since the 2012 peak as Utah's upstream natural gas industry continues to suffer from six previous years of low prices.

Construction of new utility-scale solar facilities continued in 2020 and 2021 with the addition of about 650 megawatts (MW) of capacity, bringing Utah's total solar capacity to 1.5 gigawatts (GW). Solar dominates Utah's renewable energy portfolio providing 66% of total renewable capacity. In the residential sector, total installed residential PV capacity in Utah has increased from just 6 MW in 2013 to about 300 MW in 2020.

Utah coal production dropped to the lowest level in nearly 40 years, just 12.5 million tons in 2021, despite a 2 million ton increase in demand at Utah power plants. The establishment of a foreign export coal market continues to be a challenge as access to West Coast ports remains in question. Electricity generation in Utah rebounded 18% in 2021, and the pandemic caused an increase in residential home electricity usage as work-from-home directives continued into 2021. Electricity prices remain steady and continue to be more than 20% lower than the national average.

Questions still linger as to how Utah's energy industry will adjust to the emergence of new coronavirus variants and continued uncertainty regarding energy demand, inflation, and supply-chain challenges. Demand for oil and natural gas reached record highs in 2021 and will continue to play a major role in Utah's energy landscape. However, there is a noticeable shift at the federal level to move more quickly to carbon-neutral energy sources. Fortunately, Utah is well positioned to take the lead in this energy transition with major research projects focused on geothermal energy, hydrogen technology, carbon sequestration opportunities, and utility-scale storage, as well as the continued buildout of large-scale PV solar farms, which soon could be coupled with innovative battery storage.

2021 SUMMARY

Petroleum

***Production*.** Utah oil production took a major hit in 2020, dropping to 31.0 million barrels, when the COVID-19 pandemic caused major global disruptions to petroleum prices and demand. Production bottomed out at 69,600 barrels per day in May 2020, but then steadily increased back to pre-pandemic levels in 2021, hitting 98,700 barrels per day by August 2021 (the most recent data available). Total crude oil production for 2021 is

expected to reach 34.9 million barrels, a 13% increase from 2020, attributable to the drilling of successful long-reach (10,000+ feet) horizontal wells in the Uinta Basin.

Total crude oil pipeline imports from Colorado, Wyoming, and Canada increased 10% to 38 million barrels in 2021 as refineries adjusted to post-COVID-19 increases in petroleum product demand. Similarly, refinery receipts—the amount of crude oil delivered to Utah's five refineries—increased 11% to 66 million barrels. With the growth in production in 2021, estimated exports of Utah crude oil increased to 6.6 million barrels.

Prices and Value. After a volatile year in 2020, oil prices increased steadily in 2021 as petroleum demand approached pre-pandemic levels. Utah oil prices started the year near $52 per barrel but progressively increased to just over $70 per barrel by the fall, before falling again back to the lower $60 per barrel range in December. The overall average 2021 crude oil price in Utah is estimated at $61 per barrel, up 75% from the 2020 price. The increase in price, coupled with a resultant surge in production, pushed the value of Utah's produced crude oil up to $2.1 billion in 2021, nearly double the 2020 value. Following suit, Utah's average price for regular unleaded motor gasoline and diesel also increased in 2021 to $3.28 and $3.41 per gallon, respectively.

Consumption. Petroleum product demand plummeted in 2020 as travel restrictions and stay-at-home directives went into effect due to the COVID-19 pandemic, but demand mostly rebounded back to pre-pandemic levels in 2021. Utah's refined petroleum product production recovered to 78 million barrels in 2021, a 10% increase from 2020. Refined petroleum product imports from Wyoming via the Pioneer pipeline increased 3% in 2021, and Utah refineries exported an estimated 34 million barrels of petroleum products via pipeline to other states. Utah's total petroleum product consumption is expected to reach a new record high in 2021 at 61 million barrels, 13% higher than the COVID-19-influenced drop in demand in 2020, and 3% higher than pre-pandemic levels. Nearly 50% of total petroleum demand was motor gasoline whereas diesel represented 28%, with other uses making up the difference.

Natural Gas

Production. Utah's natural gas production peaked in 2012 at 491 billion cubic feet (Bcf) but has since retreated to 238 Bcf in 2021, the lowest in the past 35 years. The sustained decline in production is the result of several years of low prices and a lack of natural gas-specific drilling. Production would have decreased even further if not for the significant associated gas produced from recent oil wells. Dry natural gas production and natural gas sales also decreased to 229 and 198 Bcf, respectively. Natural gas liquids production increased slightly to 3.0 million barrels in 2021. Nearly all of Utah's natural gas production comes from conventional reservoirs; only a few unconventional shale gas exploratory wells have been drilled, all before natural gas prices declined in 2015.

Prices and Value. After averaging about $2.50 per Mcf for the past six years, the wellhead price for natural gas in Utah increased to $4.00 in 2021, 104% higher than 2020. Natural gas prices near $2.50 per Mcf provide little economic justification for natural gas exploration or development. However, the recent increase in prices has not spurred any significant new drilling yet, but if prices remain at this level, natural gas drilling will most likely resume. Similarly, the residential natural gas price increased over 7% in 2021 to $8.75 per Mcf. Despite slightly lower natural gas production in 2021, the large increase in price, including increases in the price of natural gas liquids, resulted in a 2021 natural gas production value of $1.1 billion, more than double the 2020 value.

Consumption. Natural gas consumption in Utah has been volatile over the past several years mostly due to large swings in the electric utility market. After reaching a record high of 264 Bcf in 2019, consumption decreased 3% in 2020 to 255 Bcf, before rebounding in 2021 to 260 Bcf. Most natural gas is used for residential purposes (28%) or electricity generation (28%), followed by the commercial (17%) and industrial (15%) sectors. For the first time since the early 1980s, Utah consumed more gas than it produced in 2020 and 2021 and is no longer a net-exporter.

Coal

Production. At the end of 2021, Utah has six active coal mines, the fewest number since mining operations began in Utah nearly 150 years ago. For the first time in the history of Utah's coal industry (except for maybe the very early days), no coal was produced in Carbon County after the idling of Wolverine's Dugout Canyon mine in late 2019 and a shift in mining at the Skyline mine to the Flat Canyon area (Sanpete County). Overall, coal production is expected to decrease by 6% in 2021 to 12.5 million short tons, well below the 24.5 million tons averaged in the 2000's. Declining Utah coal production started during the 2008 recession but demand never rebounded like other energy commodities since coal has dropped out of favor as a fuel for electric and industrial needs. Production at the two remaining Wolverine mines, Skyline and Sufco, accounted for 57% (7.1 million tons) of Utah's total coal production. Emery County Coal Resources took over ownership of the Lila Canyon mine in 2020 and produced 3.3 million tons of coal in 2021. In mid-2020, COP Coal Development bought the Castle Valley mines, now called Gentry, from Rhino Resources and produced about 500,000 tons in 2021. The Coal Hollow mine in southern Utah produced about 500,000 tons in 2021 from their surface mine, including new production on their long-sought federal coal leases. Bronco Energy's Emery mine produced about 1.1 million tons of coal in 2021, more than double the 474,000 tons produced in 2020.

Prices and Value. The average mine-mouth price for Utah coal decreased to about $33 per short ton in 2021, still a relatively high price in nominal dollars but well below the inflation-adjusted high of $109 per ton reached in 1976. The end-use price of coal at Utah electric utilities, which includes transportation costs, decreased slightly to $43 per ton in 2021. The value of coal produced in Utah totaled $418 million in 2021, 16% lower than 2020, and well below the inflation-adjusted high of $1.4 billion recorded in 1982.

Consumption. Demand for coal in Utah dropped 17% between 2015 and 2016, then remained steady (about 12.6 million tons) until 2020 when it dropped to about 11 million tons in response to the pandemic-related decline in electricity demand. Demand rebounded in 2021 to approximately 13 million short tons, 97% of which was burned at electric utilities. Coal demand in Utah's industrial sector, mostly by cement and lime producers, dropped to about 350,000 tons in 2021, a quarter of peak demand of 1.4 million tons reached in 2005. Utah was a significant net exporter of coal to neighboring states, but out-of-state domestic demand dropped from a high of 16 million tons in 2001 to 1.8 million tons in 2021. Utah's foreign coal exports peaked in the mid-1990s at about 5 million tons, then dropped to near zero in the mid-2000's. Demand from the foreign market has increased over the last decade, totaling an estimated 2.8 million tons in 2021; however, West Coast port access for overseas transport remains a challenge.

Electricity (Including Renewable Resources)

Production. Electricity generation in Utah increased 18% to 43,888 gigawatt hours (GWh) in 2021 after recording a nearly 20-year low in 2020. Coal-fired electric generation once dominated Utah's electric portfolio, providing 94% of electric generation in 2005. In 2021, coal accounted for only 64% of electric generation. Increases in natural gas generation (23%) and renewable sources (13%) have broadened Utah's generation portfolio. The largest change in Utah's electricity sector is the recent exponential increase in utility-scale PV solar capacity. Between mid-2015 and the end of 2016, 855 MW of utility-scale solar capacity came online, more than wind, hydroelectric, geothermal, and biomass combined. Between late 2019 and the end of 2021, an additional 678 MW of solar was installed for a total of 1.5 GW of utility-scale solar capacity. With these new additions, solar contributed 8% of Utah's total electric generation in 2021. In contrast, Utah's coal-fired power plants reduced their electricity generation nearly 30% since 2008.

Prices. The overall price of electricity in Utah has remained mostly steady over the past ten years. Utah's 2021 average electric rate of 8.4 cents per kilowatt-hour (kWh) for all sectors of the economy is 24% lower than the national average of 11.2 cents. This lower rate is attributed to Utah's established fleet of coal-fired power plants, which still supply 64% of electricity generation in the

state, as well as recent low natural gas prices. The residential price of Utah's electricity increased a modest 0.6% in 2021 to 10.5 cents per kWh, lower than the national average of 13.7 cents per kWh.

Consumption. Unlike other energy-related effects from the COVID-19 pandemic, electricity demand actually increased in 2020, setting a new record high of 31,663 GWh, and then increased again in 2021 to an estimated 32,700 GWh. These increases mostly took place in the residential (accounting for 34% of total demand) and commercial (37% of total) sectors, while electricity demand in the industrial sector (29% of total) remained steady. Residential electricity consumption per person decreased from an average of 3.22 MWh per capita between 2006 and 2013 to 3.05 MWh between 2014 and 2019. This decrease was most likely related to increased energy efficiency measures as well as the increased use of residential PV solar. However, the COVID-19 pandemic spurred increased electricity usage in the residential sector (e.g., more work-from-home opportunities, etc.), resulting in an increase in per person electricity usage of 3.22 MWh in 2020 and 3.31 MWh in 2021. Overall, Utah remains a net exporter of electricity, using only 75% of in-state electric generation.

2022 OUTLOOK

While 2020 was dominated by the impact of the COVID-19 pandemic on Utah's energy industry, 2021 was dominated by the subsequent recovery and a return to a new normal. However, several unknowns still permeate Utah's energy outlook, including the emergence of coronavirus variants and the continued uncertainty about long-term impacts of the pandemic. In addition, there is intensifying interest in "the energy transition" with increasing emphasis on renewable and carbon-neutral energy sources, innovations in the hydrogen economy, and the electrification of the transportation system.

Oil prices in Utah will most likely remain volatile but relatively high in 2022, in the upper-$50 to mid-$60 per barrel range as demand continues to recover. Oil prices in this range will support 8 to 10 drill rigs in the Uinta Basin, mostly drilling long-reach horizontal wells, but with some continued vertical/directional development, all resulting in slowly increasing oil production. Exploration/development elsewhere in Utah will likely remain minor compared with drilling in the Uinta Basin. The Environmental Impact Statement (EIS) for the proposed railway spur into the Uinta Basin has been completed and the federal Surface Transportation Board will soon announce a Record of Decision (not yet released as of early December 2021). If approved and financed, the proposed railway could open new out-of-state markets for Utah's crude oil, creating potential for significantly higher crude oil production. Demand for petroleum products in Utah is projected to hit record highs in 2021 and is expected to continue this upward trend into 2022 and beyond—any petroleum demand reductions caused by the electrification of Utah's transportation sector will take years to materialize.

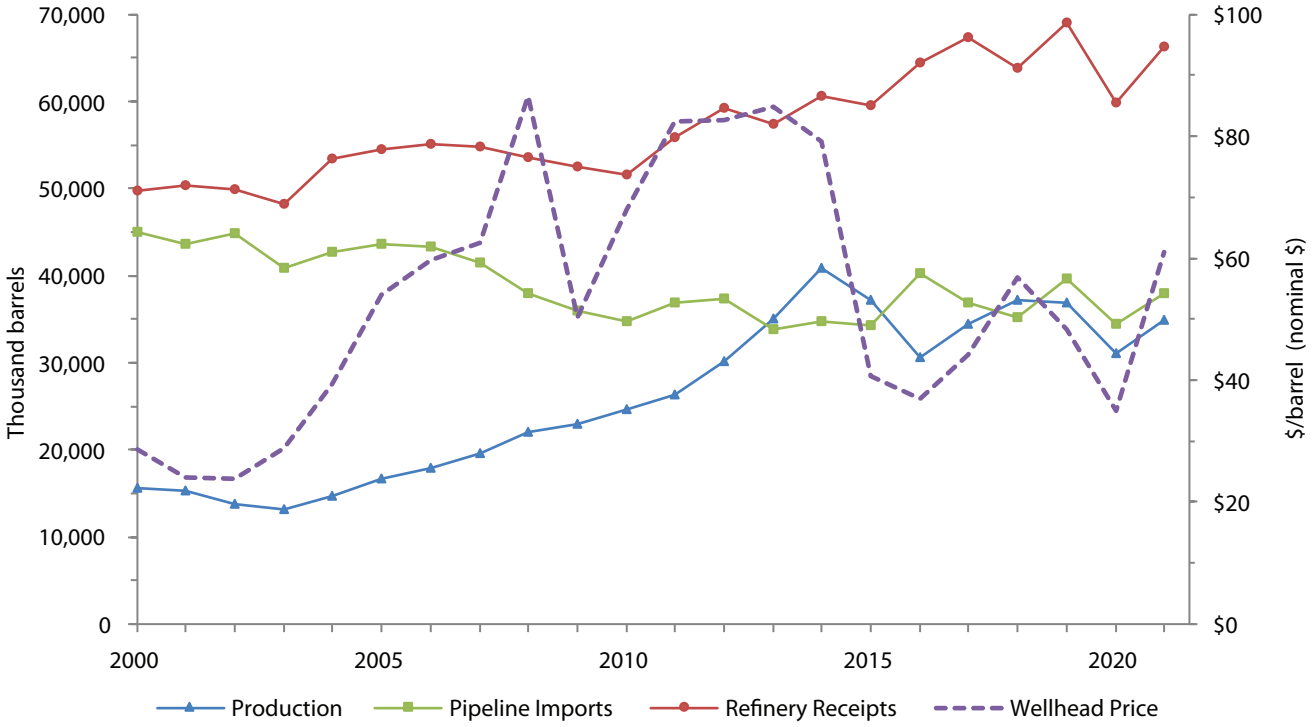
Several years of sub-$3 per Mcf natural gas prices caused stagnation in Utah's natural gas production industry, resulting in the lowest production levels since the 1980s. However, in late 2021, the price of natural gas increased into the $4 to $6 per Mcf range, but it is unclear if these prices will continue or drop back to recent averages. To encourage significant drilling for natural gas in Utah, prices need to remain at least above $3 to $4 per Mcf for a sustained period of time. To this end, several groups have sought new markets for Rocky Mountain natural gas to help alleviate concerns of oversupply (and low prices), including access to proposed liquefied natural gas (LNG) facilities on the West Coast (including northern Mexico) to tap into Asian markets.

Coal production in Utah is expected to remain in the 12- to 14-million-ton per year range for the next few years, as in-state demand currently averages 12 to 13 million tons a year, and out-of-state demand continues to be less than 2 million tons per year. This current supply-demand balance will change starting in about 2025 when the coal-fired Intermountain Power Plant converts to natural gas and eventually hydrogen, removing demand for 3 to 4 million tons of coal. 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 partially replace

falling domestic demand. However, 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.

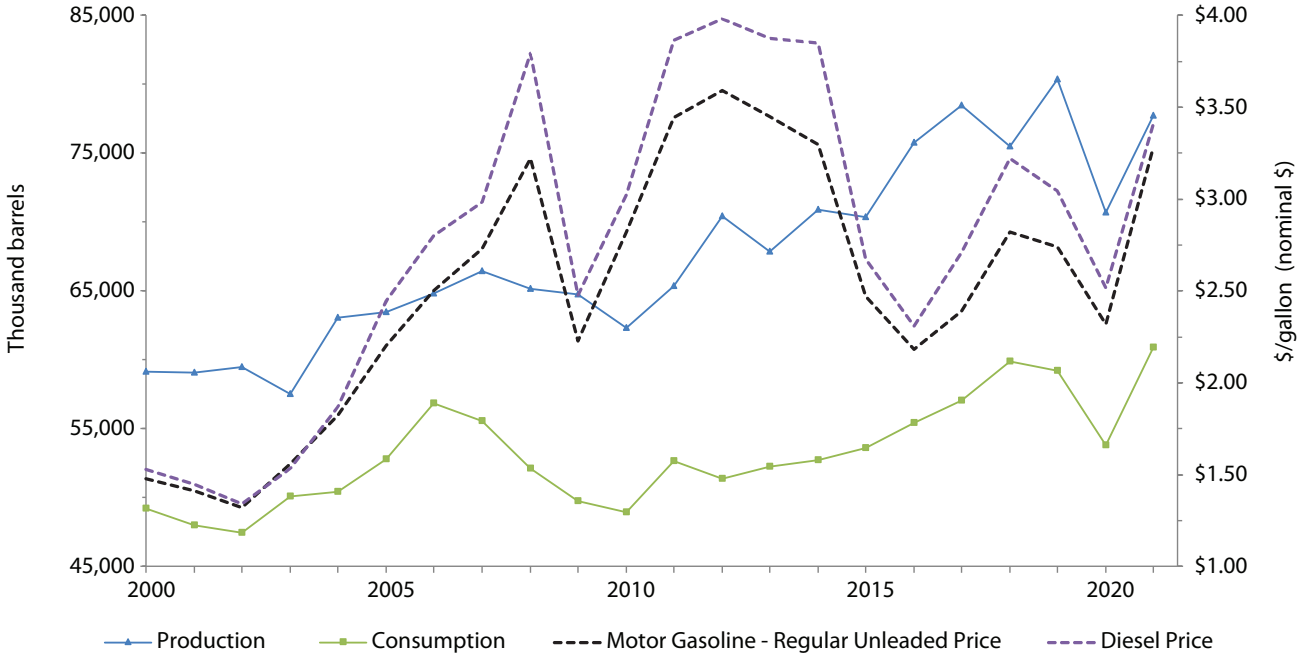
Utah's electric generation portfolio continues to evolve as demand for carbon-neutral electricity increases and several new utility-scale solar farms are installed in 2022 and beyond. This intensified emphasis on renewable energy has spurred research and development into large-scale electric storage facilities (e.g., compressed air storage in salt domes near Delta, Utah, as well as more traditional utility-scale battery storage), the generation of electricity from "renewable" natural gas sources (e.g., large-scale anaerobic digesters), the continued development of enhanced geothermal systems at the Frontier Observatory for Research into Geothermal Energy (FORGE) site in central Utah, and the production of carbon-neutral hydrogen for electricity generation or vehicle fuel. Consumption of electricity has resumed its faster-paced growth as our modern society becomes more reliant on electricity for everyday conveniences. 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 1.5 GW of solar capacity, will assure affordable, reliable electric power for the near future and keep Utah's electricity prices more than 20% below the national average.

Figure 17.1: Utah's Crude Oil Production, Pipeline Imports, and Refinery Receipts Plotted with Wellhead Price, 2000–2021



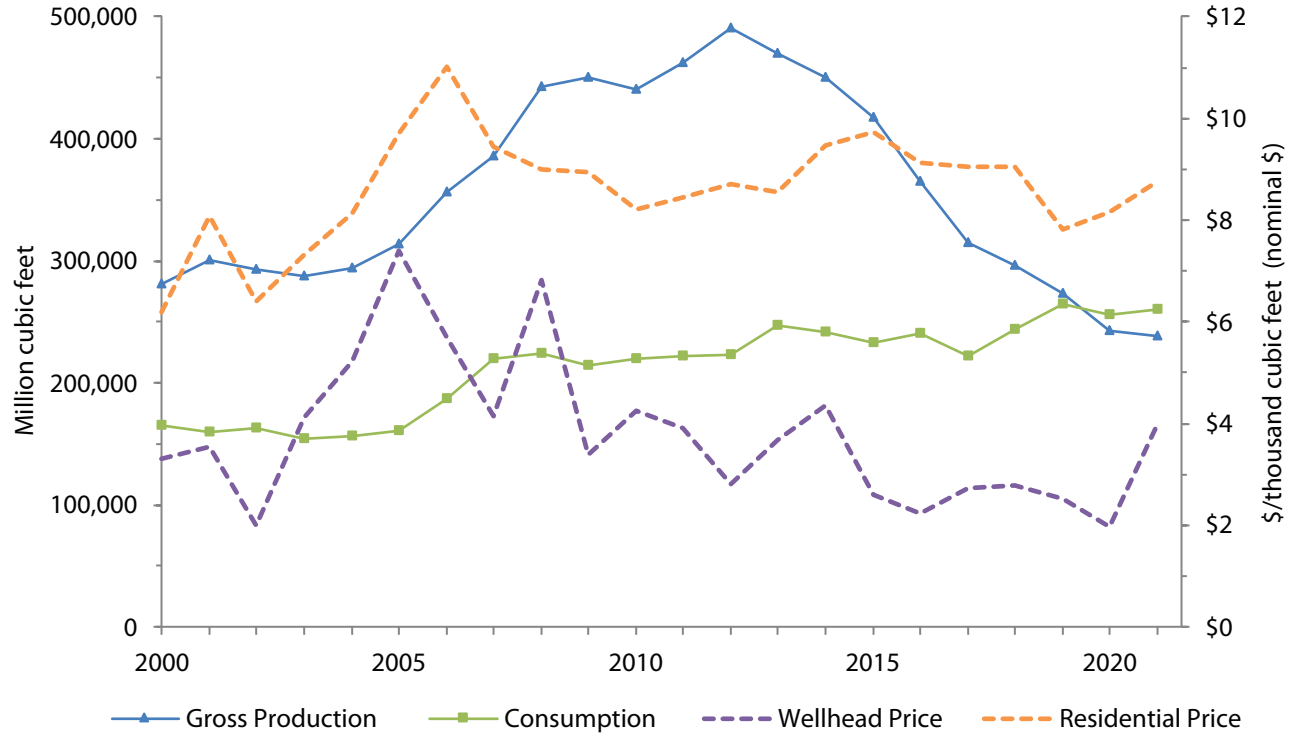
Source: Utah Geologic Survey, Utah Department of Oil, Gas, and Mining, U.S. Energy Information Association, Baker Hughes (rig data)

Figure 17.2: Utah's Petroleum Product Production and Consumption Plotted with Motor Gasoline and Diesel Prices, 2000–2021



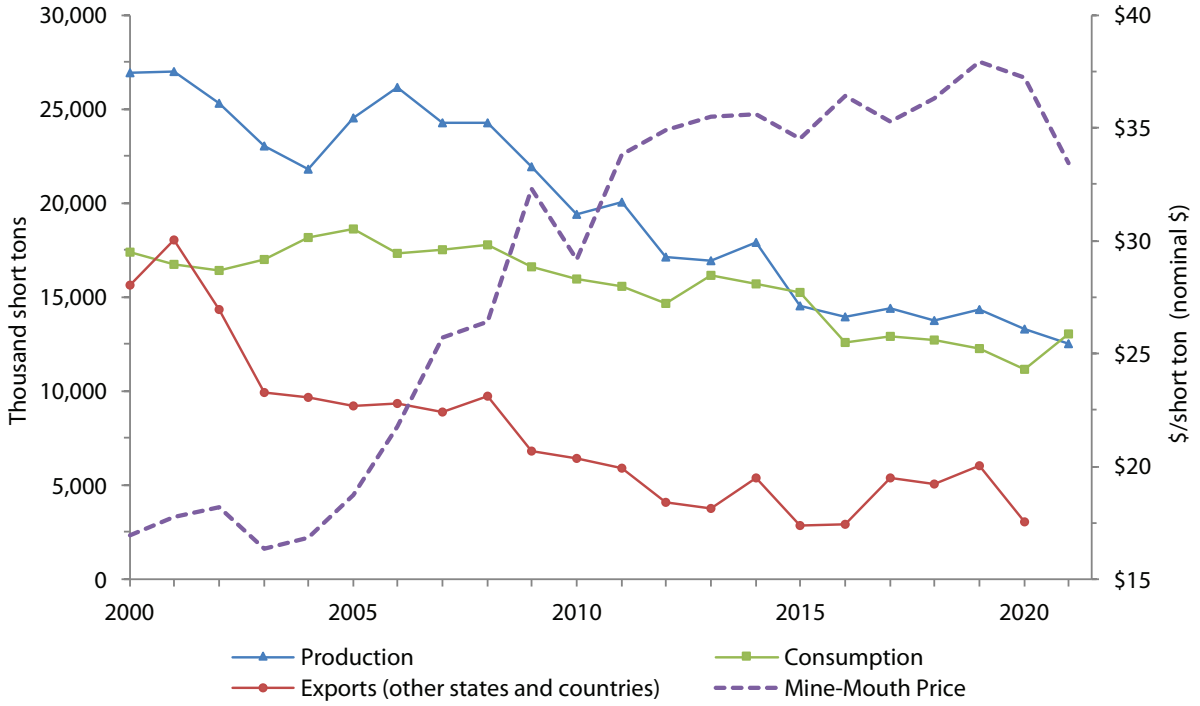
Source: Utah Geological Survey, U.S. Energy Infomation Administration, Federal Energy Regulatory Agency

Figure 17.3: Utah's Natural Gas Production and Consumption Plotted with Wellhead and Residential Prices, 2000–2021



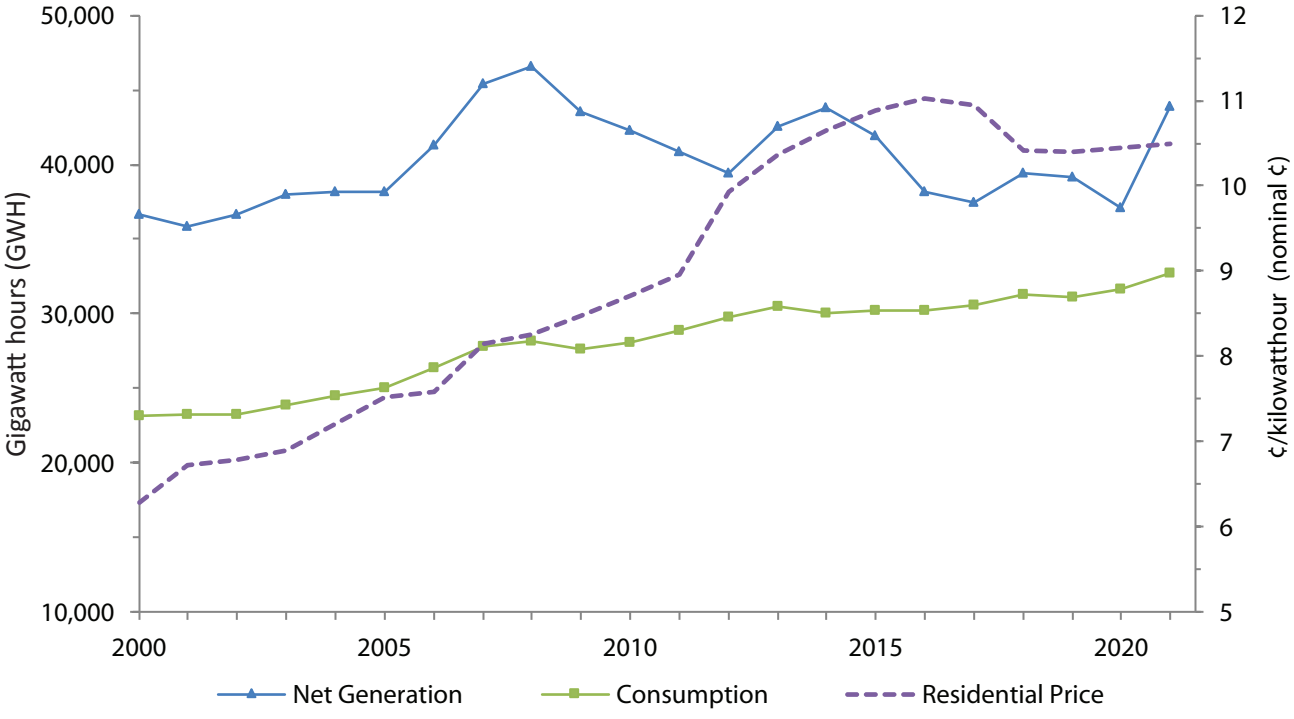
Source: Utah Geological Survey, Utah Tax Commission, Utah Division of Oil, Gas and Mining, U.S. Energy Infomation Administration

Figure 17.4: Utah's Coal Production, Consumption, and Exports Plotted with Mine-Mouth Price, 2000–2021



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

Figure 17.5: Utah's Electricity Net Generation and Consumption Plotted with End-Use Residential Price, 2000–2021



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

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

Year	Supply[1]				Drilling	Disposition				Price	Value
	Utah Crude Production	Colorado Imports	Wyoming Imports	Canadian Imports	Average # of rigs operating in Utah	Utah Crude Exports[2]	Refinery Receipts	Refinery Inputs	Refinery Beginning Stocks	Wellhead ($/barrel)	Value of Utah Crude Oil (Million $)
	Thousand barrels					Thousand barrels					
2000	15,608	7,163	26,367	11,528	15	10,950	49,716	49,999	786	$28.53	$445
2001	15,271	7,208	25,100	11,364	21	8,633	50,310	50,143	457	$24.09	$368
2002	13,770	7,141	25,455	12,215	13	8,619	49,962	49,987	591	$23.87	$329
2003	13,096	6,964	24,152	9,690	14	5,635	48,267	48,284	547	$28.88	$378
2004	14,742	7,559	22,911	12,195	22	4,007	53,400	53,180	532	$39.35	$580
2005	16,675	8,214	24,372	10,991	28	5,739	54,513	54,544	767	$53.98	$900
2006	17,926	9,355	23,256	10,633	40	6,051	55,119	55,192	728	$59.70	$1,070
2007	19,534	10,708	22,012	8,769	41	6,258	54,764	54,952	662	$62.48	$1,220
2008	22,040	10,259	21,316	6,382	42	6,360	53,637	53,165	473	$86.58	$1,908
2009	22,941	7,409	23,000	5,520	18	6,395	52,475	52,479	519	$50.22	$1,152
2010	24,666	6,525	24,000	4,278	27	7,832	51,637	51,678	511	$68.09	$1,679
2011	26,276	6,997	26,050	3,894	28	7,318	55,900	55,656	473	$82.53	$2,169
2012	30,204	7,805	25,118	4,394	37	8,368	59,153	58,961	692	$82.73	$2,499
2013	35,002	7,601	23,124	3,111	29	11,493	57,345	56,921	669	$84.79	$2,968
2014	40,914	7,662	23,425	3,636	25	15,090	60,548	60,677	798	$79.04	$3,234
2015	37,136	7,048	22,211	4,963	7	11,809	59,549	59,568	660	$40.69	$1,511
2016	30,528	7,110	27,318	5,873	3	6,348	64,482	64,496	719	$36.92	$1,127
2017	34,438	5,763	26,187	4,967	9	4,043	67,311	67,526	826	$44.24	$1,524
2018	37,117	5,616	23,819	5,803	7	8,575	63,780	63,805	730	$56.85	$2,110
2019	36,933	5,253	26,059	8,308	6	7,487	69,067	69,033	821	$48.32	$1,785
2020	31,001	4,820	22,572	7,030	3	5,589	59,835	60,178	978	$34.91	$1,082
2021e	34,900	4,100	25,200	8,600	8	6,600	66,200	66,200	747	$61.00	$2,129

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, Baker Hughes (rig data)

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

	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
Year	Thousand barrels			Thousand barrels					Thousand barrels	$/gallon	
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	5,113	12,707	6,367	48,948	21,490	$2.82	$3.03
2011	65,369	2,689	11,383	25,568	4,843	15,448	6,772	52,631	23,058	$3.44	$3.87
2012	70,456	2,860	13,316	25,228	4,670	14,776	6,694	51,368	26,695	$3.59	$3.98
2013	67,892	3,077	15,204	26,085	4,482	15,317	6,361	52,245	26,654	$3.45	$3.88
2014	70,931	2,676	13,853	26,469	4,811	15,169	6,264	52,713	27,260	$3.30	$3.85
2015	70,385	2,980	16,615	27,776	5,385	14,293	6,160	53,614	28,972	$2.47	$2.67
2016	75,780	2,771	16,402	28,535	6,083	14,248	6,566	55,432	30,966	$2.19	$2.31
2017	78,473	2,652	15,530	28,769	6,499	15,043	6,746	57,057	32,666	$2.39	$2.71
2018	75,506	2,918	15,876	28,725	8,795	15,700	6,644	59,864	31,164	$2.82	$3.22
2019	80,371	2,762	16,370	29,667	7,555	15,040	6,922	59,184	33,025	$2.74	$3.04
2020*	70,700	3,316	14,700	26,662	5,252	15,668	6,205	53,787	19,589	$2.32	$2.52
2021e	77,700	2,625	15,100	29,700	7,400	16,900	6,900	60,900	33,500	$3.28	$3.41

*Consumption was estimated.

e = estimate

1 Amounts shipped by truck are unknown.

2 The Pioneer pipeline, originating from Sinclair, Wyoming, is the only pipeline importing petroleum products into Utah.

3 Prior to 2012, only the Chevron Petroleum pipeline exported product to the Northwest (Idaho and Washington); in 2013 this line was sold to Tesoro. Starting in 2012, the UNEV pipeline started shipping product to the Las Vegas area; however, a minor amount of product is offloaded near Cedar City (amount estimated).

Note: Prices are in nominal dollars.

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

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

	Production				Consumption by End Use							Prices					Value
	Gross	Dry	Actual Sales	Natural Gas Liquids Production	Residential	Commercial	Vehicle Fuel	Industrial	Electric Utilities	Lease, Plant, & Pipeline	Total	Wellhead	End-Use Residential	End-Use Commercial	End-Use Industrial	Natural Gas Liquids	Value of NG and NGL
Year	Million cubic feet			Thousand bbl	Million cubic feet							$/thousand cubic feet				$/bbl	Million $
2000	281,170	256,490	140,226	5,150	55,626	31,282	848	39,378	10,544	27,344	165,022	$3.31	$6.20	$4.92	$3.93	$11.31	$907
2001	300,966	272,534	219,138	4,641	55,008	30,917	474	33,584	15,141	24,175	159,300	$3.54	$8.09	$6.78	$5.29	$12.47	$1,023
2002	293,030	271,387	250,172	3,542	59,398	33,501	482	26,879	15,439	27,681	163,380	$1.99	$6.39	$5.20	$3.91	$8.91	$572
2003	287,141	264,654	224,327	3,080	54,632	30,994	589	25,200	14,484	28,226	154,125	$4.12	$7.33	$5.95	$5.04	$12.18	$1,128
2004	293,807	274,588	253,855	3,196	60,527	31,156	661	26,674	9,423	27,450	155,891	$5.22	$8.12	$6.75	$5.90	$19.66	$1,496
2005	313,491	298,408	269,062	2,310	58,044	34,447	187	25,370	12,239	29,989	160,276	$7.40	$9.71	$8.23	$7.33	$32.31	$2,283
2006	356,339	345,409	320,163	1,925	60,017	34,051	186	29,076	28,953	35,116	187,399	$5.69	$11.02	$9.61	$8.02	$31.40	$2,026
2007	385,517	373,680	350,285	1,769	60,563	34,447	209	31,578	56,438	36,464	219,699	$4.14	$9.44	$8.03	$6.35	$45.16	$1,627
2008	442,524	430,286	382,960	2,564	65,974	37,612	208	33,112	55,374	31,907	224,187	$6.82	$9.00	$7.74	$7.21	$68.15	$3,109
2009	449,675	435,673	390,475	4,817	65,184	37,024	149	29,845	49,984	32,034	214,220	$3.38	$8.95	$7.57	$5.62	$38.87	$1,660
2010	439,929	422,067	387,593	5,869	66,087	38,461	203	32,079	48,399	33,985	219,214	$4.25	$8.22	$6.83	$5.57	$49.98	$2,087
2011	462,495	442,615	406,323	7,571	70,076	40,444	290	33,633	40,138	37,646	222,227	$3.92	$8.44	$7.05	$5.50	$60.99	$2,197
2012	490,575	474,756	436,090	8,106	59,801	35,363	289	36,350	47,138	44,098	223,039	$2.82	$8.70	$7.00	$4.69	$50.49	$1,748
2013	470,349	455,454	409,704	8,132	70,491	41,398	224	38,009	49,562	47,602	247,286	$3.68	$8.55	$7.13	$5.22	$54.03	$2,115
2014	450,024	435,893	391,536	9,693	62,458	38,156	256	38,330	58,780	43,758	241,738	$4.35	$9.48	$7.71	$5.87	$46.13	$2,343
2015	417,023	401,722	360,018	7,286	58,562	35,772	326	37,189	56,449	44,315	232,613	$2.60	$9.72	$7.97	$5.93	$22.84	$1,213
2016	365,281	352,437	319,056	5,573	63,929	39,066	305	38,568	59,684	38,562	240,114	$2.24	$9.12	$7.43	$5.52	$25.51	$932
2017	315,197	304,266	278,015	4,813	66,700	41,264	354	40,007	40,830	32,679	221,834	$2.72	$9.05	$7.40	$5.51	$31.94	$981
2018	295,826	284,264	249,763	3,817	67,415	42,367	348	39,935	61,161	32,831	244,057	$2.77	$9.04	$7.37	$5.31	$46.33	$964
2019	272,994	262,157	223,142	4,003	75,938	47,336	322	41,348	67,386	31,972	264,302	$2.51	$7.82	$6.35	$5.00	$24.07	$754
2020	242,582	233,239	202,084	2,935	74,191	44,216	273	40,119	66,724	29,824	255,347	$1.96	$8.15	$6.56	$5.07	$22.53	$523
2021e	238,000	229,000	198,000	3,000	73,400	44,600	300	39,800	72,000	30,000	260,100	$4.00	$8.75	$7.25	$5.65	$55.00	$1,081

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

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

	Supply		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
Year	Thousand short tons										$/short ton		Million $
2000	26,920	2,535	27,955	59	984	1,166	15,164	17,373	12,553	3,073	$16.93	$23.16	$456
2001	27,024	3,062	26,906	60	547	1,235	14,906	16,748	15,920	2,144	$17.76	$25.48	$480
2002	25,299	2,251	24,392	198	0	592	15,644	16,434	13,170	1,142	$18.20	$21.84	$460
2003	23,069	2,039	23,551	61	0	611	16,302	16,974	9,584	318	$16.36	$23.20	$377
2004	21,818	3,033	23,145	214	0	1,330	16,606	18,150	9,294	346	$16.82	$24.95	$367
2005	24,556	2,776	23,025	45	0	1,431	17,118	18,594	8,835	351	$18.71	$24.52	$459
2006	26,131	1,925	24,520	35	0	680	16,609	17,324	9,279	55	$21.77	$27.34	$569
2007	24,288	1,596	24,451	23	0	911	16,593	17,527	8,877	0	$25.69	$30.33	$624
2008	24,275	2,528	25,426	0	0	873	16,927	17,800	9,219	541	$26.39	$30.66	$641
2009	21,927	4,251	20,487	0	0	718	15,925	16,643	6,643	148	$32.32	$33.96	$709
2010	19,406	1,775	19,220	0	0	717	15,233	15,950	5,807	634	$29.15	$37.68	$566
2011	20,073	2,020	19,039	0	0	598	15,005	15,603	4,841	1,081	$33.80	$39.21	$678
2012	17,155	1,708	16,140	0	0	588	14,084	14,672	3,012	1,080	$34.92	$41.84	$599
2013	16,953	1,864	16,896	0	0	645	15,529	16,174	2,673	1,110	$35.52	$44.73	$602
2014	17,933	1,967	17,829	0	0	614	15,062	15,676	2,543	2,869	$35.59	$46.03	$638
2015	14,513	3,098	14,938	0	0	662	14,580	15,242	2,116	735	$34.53	$42.12	$501
2016	13,978	1,908	14,620	0	0	575	12,001	12,576	1,890	1,049	$36.40	$41.36	$509
2017	14,417	2,314	15,020	0	0	485	12,438	12,923	2,242	3,123	$35.28	$41.56	$509
2018	13,753	1,907	14,084	0	0	378	12,332	12,710	1,907	3,148	$36.31	$43.31	$499
2019	14,347	2,219	15,284	0	0	382	11,891	12,273	2,077	3,964	$37.95	$42.79	$544
2020	13,325	2,334	13,176	0	0	306	10,866	11,172	1,521	1,554	$37.22	$44.31	$496
2021e	12,500	1,900	14,628	0	0	350	12,700	13,050	1,800	2,800	$33.45	$43.23	$418

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 Price of Electricity in Utah

	Net Generation by Fuel Type										Consumption by End Use					Prices by End Use			
Year	Coal	Petroleum	Natural Gas	Hydro	Geo-thermal	Wind	Solar	Biomass[1]	Other[2]	Total	Residential	Commercial	Industrial	Total	Residential Consumption Per Capita	Residential	Commercial	Industrial	All Sectors
	Gigawatthours										Gigawatthours				MWh/person	¢/kilowatthour			
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	3.16	8.5	7.0	4.8	6.8
2010	34,057	50	6,455	696	277	448	0	56	210	42,249	8,834	10,402	8,808	28,044	3.19	8.7	7.2	4.9	6.9
2011	33,138	54	5,256	1,230	330	573	0	58	197	40,836	8,947	10,579	9,333	28,859	3.17	9.0	7.4	5.1	7.1
2012	30,799	40	6,580	748	335	704	2	60	137	39,403	9,188	10,841	9,694	29,723	3.21	9.9	8.1	5.6	7.8
2013	34,285	26	6,606	505	319	540	2	71	163	42,517	9,402	11,062	10,010	30,474	3.24	10.4	8.3	5.9	8.2
2014	33,377	24	8,376	633	522	660	2	73	118	43,785	8,964	11,114	9,965	30,043	3.05	10.7	8.5	6.1	8.4
2015	31,656	20	8,218	769	430	626	32	85	114	41,949	9,117	11,670	9,405	30,192	3.04	10.9	8.6	6.2	8.5
2016	25,939	32	8,691	760	485	822	1,054	84	267	38,134	9,371	11,622	9,187	30,180	3.07	11.0	8.8	6.3	8.7
2017	26,390	38	5,871	1,294	481	858	2,211	78	191	37,412	9,511	11,795	9,283	30,589	3.05	11.0	8.7	6.1	8.6
2018	25,912	37	8,724	927	446	795	2,224	79	232	39,375	9,715	12,135	9,393	31,242	3.07	10.4	8.2	5.9	8.2
2019	25,241	40	9,369	875	310	819	2,186	71	206	39,117	9,740	11,912	9,491	31,143	3.02	10.4	8.3	6.0	8.2
2020	22,806	40	9,460	817	377	803	2,571	78	137	37,087	10,547	11,444	9,672	31,663	3.22	10.4	8.3	5.9	8.3
2021e	27,900	40	10,200	840	350	770	3,500	78	210	43,888	11,000	12,200	9,500	32,700	3.31	10.5	8.1	6.3	8.4

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

Health Care

18

Laura Summers, Kem C. Gardner Policy Institute

2021 OVERVIEW

COVID-19 continued to be a leading public health issue in Utah and the world in 2021. As of December 3, 2021, the state had 601,952 total COVID-19 cases, 4,006,158 total tests completed, 26,108 hospitalizations, and 3,564 deaths from COVID-19. The highest number of daily positive tests, to date, was on December 30, 2020 (4,706). The state surpassed its intensive care unit utilization threshold in late fall 2020 and again in August 2021. Intensive care unit utilization has remained above the 85% utilization threshold since late August 2021.

As of December 3, 2021, individuals age 25–44 continue to make up the largest share of COVID-19 cases (36%), followed by 15–24-year-olds (21%) and 45–64-year-olds (21%). Individuals age 85 and older are most likely to be hospitalized, with a case-hospitalization rate of 28.3% (followed by 65–84-year-olds at 17.8%, and 45–64-year-olds at 6.4%).

Unvaccinated Utahns are 5.6 times more likely to be hospitalized than those who are vaccinated, and 6.6 times more likely to die from COVID-19. Utahns with pre-existing conditions are also more likely to be hospitalized with severe complications from COVID-19. The top two most common conditions continue to be hypertension and diabetes (primarily type 2 diabetes).

In terms of race and ethnicity, Utah's minority populations continue to be disproportionately impacted by COVID-19. For example, Utah's Hispanic population makes up only 14.5% of Utah's population, but 18.2% of all COVID-19 cases (as of December 3, 2021). Some of Utah's minority populations are also hospitalized and die from COVID-19 at disproportionately high rates. Native Hawaiian/Pacific Islanders have the highest COVID-19 hospitalization rates per 1,000 cases when broken out by race and ethnicity (90.4). This group is followed by the American Indian/Alaska Native population (89.6). Utah's statewide average hospitalization rate as of December 3, 2021 was 43.4 per 1,000 cases.

Utah's American Indian/Alaska Native population has the highest COVID-19 mortality rate (345.2 per 100,000 people), followed by Native Hawaiian/Pacific Islanders (291.5). The statewide average is 109.7.

As of December 3, 2021, Utah had the sixth-highest rate of COVID-19 cases per million people in the country (184,647).[1] That said, Utah's fatality rate continues to be one of the lowest in the country. Part of this is due to its young and relatively healthy population.

As of December 3, 2021, 2,082,630 people in Utah had received at least one dose of a COVID-19 vaccine (64.1%), 1,822,880 people were fully vaccinated, (56.1%), and 438,833 had received a booster dose. These percentages increase with age. For example, 82.5% of the population over the age 80 has been fully vaccinated, compared to 54.4% of youth ages 12–18.

Utah ranks 29th in the country in terms of the share of the population vaccinated with at least one dose of COVID-19 vaccine (64.9% compared to 70.6% nationally).[2]

Other Health Care Concerns

Prior to COVID-19, the Utah Department of Health identified three priority improvement areas: reducing obesity and related chronic conditions; reducing prescription drug misuse, abuse, and overdose; and improving mental health and reducing suicide.[3]

1 Kaiser Family Foundation estimates based on Johns Hopkins University's COVID-19 Dashboard by the Center for Systems Science and Engineering (CSSE) and 2020 Population data from U.S. Census Bureau.

2 Kaiser Family Foundation estimates based on Centers for Disease Control and Prevention, COVID-19 Vaccinations in the United States, and 2020 Population data from U.S. Census Bureau.

3 Utah Health Status Update: The Utah Health Improvement Plan Implementation Process. (2019, May). UDOH.

Obesity

Utah generally has a relatively low share of adults who are obese compared with other states. However, the percentage has been steadily increasing. For example, the share of adults who indicate they are obese or overweight increased by 3.5 percentage points from 2009 (60.3%) to 2020 (63.8%).[4] Men are more likely to be overweight or obese than women (68.9% vs. 58.3% in 2020). Overweight, but not obese, is defined as a 25–29 BMI. Obesity is defined as a BMI of 30 or more.

Drug Misuse, Abuse, and Overdose

Utah has long experienced high rates of drug-related deaths; however, its opioid death rate has decreased in recent years. In 2019, Utah's age-adjusted opioid overdose death rate was 13.3 per 100,000 population, down from 14.8 in 2018 and a high of 16.8 in 2014.[5] In 2019, Utah had the 28th highest opioid death rate in the country, which fell below the national average of 15.5 (2020 data had not been provided at the time this report was published).

Suicide and Mental Health

Utah has one of the country's highest suicide rates (Utah ranked sixth highest in 2019; 2020 data was not available).[6] However, Utah's rate fell between 2018 and 2019 from 22.2 deaths per 100,000 total population to 21.2.

Despite observed increases in both suicides and drug overdose deaths in other states and nationally, a report from the Utah Department of Health found that there was no significant change in the number of Utahns who died by suicide since the COVID-19 pandemic began (March 2020 through June 30, 2021). The report also found that the number of Utahns who died by accidental and undetermined drug overdoses did not significantly change.[7]

Life Expectancy

Life expectancy is an estimate of the expected average number of years of life (or a person's age at death). Despite not experiencing a significant change in suicide or drug overdose deaths during COVID-19, 2020 was the first year since 2016 where Utah experienced a decrease in life expectancy for males (declining more than one year from 78.4 years to 77.1). It was also the first time since 2015 that life expectancy for Utah females decreased (declining one year from 81.9 years to 80.9).[8]

Health Care Workforce

The health care and social assistance sector is a well-established, and generally stable, industry in Utah. This industry has long been known as a recession-resilient sector, experiencing positive year-over-year growth since at least 1991. Like most industries, however, the health care and social assistance industry was negatively impacted by COVID-19.

Data from the Utah Department of Workforce Services shows that growth in Utah's health care and social assistance industry significantly slowed in 2020 compared with 2019, but remained positive (0.2%). The data also show that the industry rebounded in the first half of 2021, with a positive growth rate of 4.1% (data is for the first half of each year since numbers were currently available through only the first six months of 2021 at the time this report was published).

Monthly data confirm that net declines in employment were limited to the early part of the pandemic. Employment declines in Utah's health care and social assistance industry began in April 2020 and continued through September, before turning around to continual positive growth starting in October 2020. That said, many areas in Utah are classified as health professional shortage areas, and slowing growth or declines in employment could worsen these shortages.

4 Age-adjusted for population age 18 and older. Behavioral Risk Factor Surveillance System, Utah Department of Health.
5 Kaiser Family Foundation analysis of Centers for Disease Control and Prevention (CDC), National Center for Health Statistics. Multiple Cause of Death 1999–2019 on CDC WONDER Online Database, released 2021.
6 Suicide Mortality by State, Centers for Disease Control and Prevention.
7 Suicide and accidental drug overdose remain major problems in Utah; however, neither have increased since the onset of the COVID-19 pandemic. (2021). Utah Department of Health.
8 Utah Death Certificate Database, Office of Vital Records and Statistics, Utah Department of Health.

Health Insurance

The majority of Utahns receive health insurance through their employers. Utah has the highest rate of employer-sponsored insurance (ESI) in the nation, with more than 60.5% of Utahns having ESI compared with the national average of 49.6% (2019).[9] 2020 data had not been provided at the time this report was published.

The purchase of health savings account (HSA)-qualified high-deductible health plans (HDHPs) has also significantly increased in Utah since the mid-2000s. In 2020, HSA-qualified HDHPs accounted for 37.7% of Utah's commercial health insurance market, compared with 37.5% in 2019 and only 3.0% in 2007.

HSAs make up 44.8% of Utah's large-group market (defined as employers with 51 or more employees), 43.4% of the state's small-group market, and 22.6% of health plans purchased in the individual market.[10] These percentages represent an increase in market share in the large- and small-group markets compared with 2019.

America's Health Rankings

In 2020, Utah ranked as the sixth healthiest state in America's Health Rankings' health outcomes category.[11] Health outcomes include behavioral health, mortality, and physical health measures. America's Health Rankings Annual Report was not available for 2021 at the time this report was published; however, the United Health Foundation had released a report on health disparities. The report shows "health disparities continue to exist by gender, geography, socioeconomic status, race and ethnicity and other factors."[12]

The report shows Utah performs well on several measures related to the social determinants of health, including having low income inequality, low rates of gender disparities in terms of high school graduation rates, and a decreasing number of adults with less than a high school education who avoided care due to costs.

This is positive given data and research show that health is strongly associated with income and education. For example, low-income Utah adults (those with incomes less than $25,000) are four times as likely to report having fair or poor health as adults with $75,000 or more.[13]

However, the America's Health Rankings report shows Utah ranks poorly in having high racial and ethnic disparities in uninsured rates. Most of Utah's minority populations are less likely to have health insurance. In 2020, Utah's age-adjusted uninsured rate for adults was 11.7%. Even though Utah fully expanded Medicaid in January 2020, some population groups still experience high uninsured rates. For example, Utah's Hispanic/Latino adult population has a 29.9% uninsured rate.[14]

2022 OUTLOOK

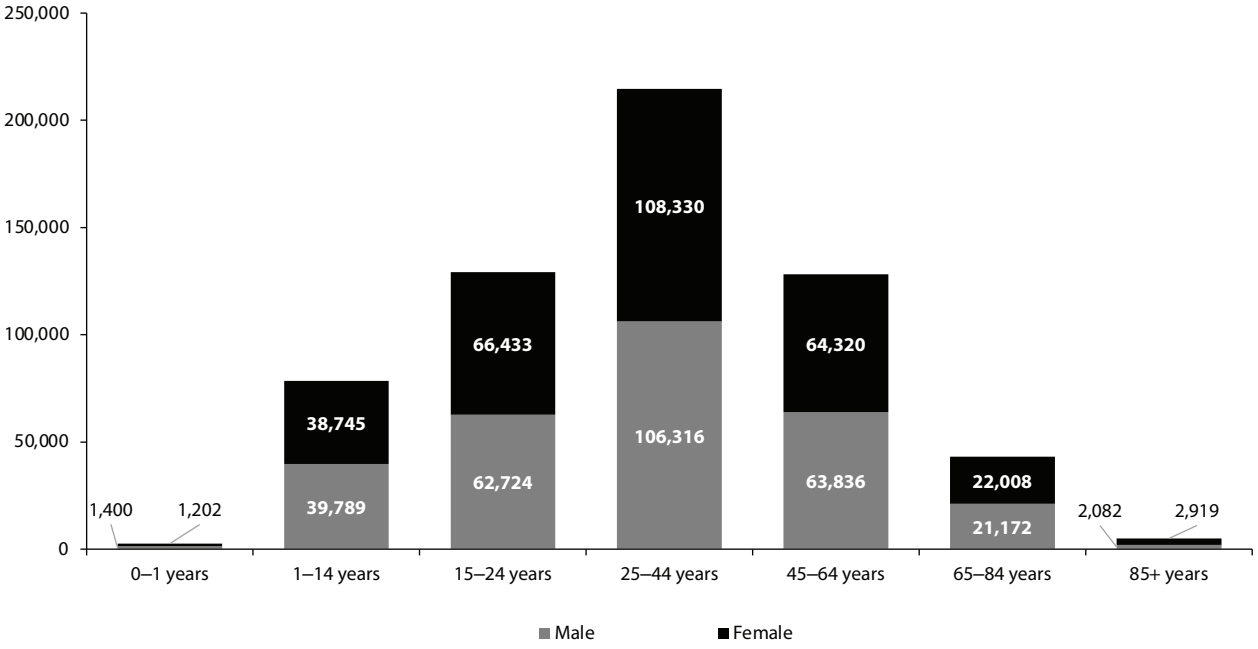
COVID-19 continued to be a key focus of Utah's health care and public health efforts in 2021, particularly with the emergence of vaccines. Attention to this issue is expected to continue into 2022.

It is also expected that the state will continue to proactively address many of the direct and indirect health issues that emerged from the pandemic in 2022. This includes, but is not limited to, encouraging people to access necessary preventive and primary care they may have delayed in 2020 and 2021 (e.g., dental care, immunizations, cancer screenings, etc.); addressing mental and behavioral health needs among Utah's adults, youth, and children; continuing to grow Utah's health care workforce to address workforce shortages; and continuing to address the racial/ethnic, income, and regional disparities in health and health care that existed before the pandemic, but were elevated due to COVID-19.

In addition, Governor Cox's administration specifically mentions "value-based care and transparency" (or enabling Utahns to make informed health care decisions) as a key focus area in its One Utah Roadmap.[15]

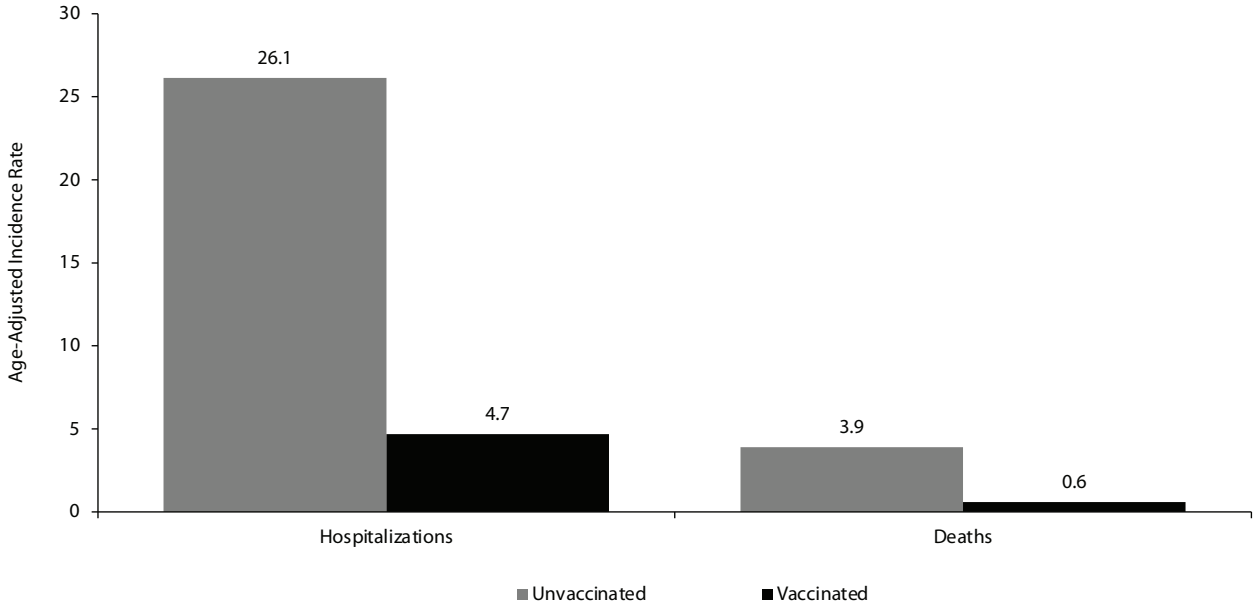
9 Kaiser Family Foundation estimates based on the Census Bureau's American Community Survey 2019 1-yr estimates.
10 Hawley, J. (2021, December). 2021 Health Insurance Market Report, State of Utah Insurance Department.
11 America's Health Rankings Annual Report, 2020 Edition. ©2020 United Health Foundation. All Rights Reserved.
12 America's Health Rankings Health Disparities Report. ©2021 United Health Foundation. All Rights Reserved.
13 Age-adjusted for population age 18 and older. Behavioral Risk Factor Surveillance System, Utah Department of Health.
14 Age-adjusted for population age 18 and older. Behavioral Risk Factor Surveillance System, Utah Department of Health.
15 One Utah Roadmap: Version 2. (2021, October 20). Governor Spencer J. Cox and Lt. Governor Deidre M. Henderson.

Figure 18.1: Utah Cumulative COVID-19 Case Counts by Age and Gender, December 3, 2021



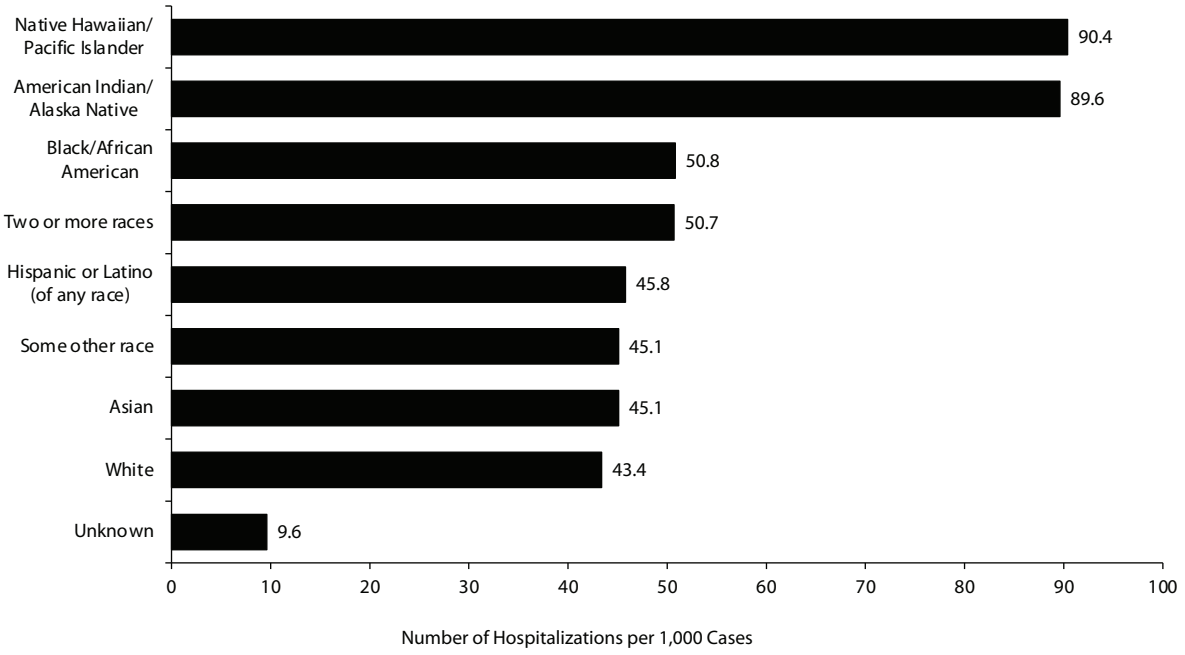
Source: Utah Department of Health COVID-19 Surveillance.

Figure 18.2: Age-Adjusted Unvaccinated and Vaccinated Incidence Rates in Utahns Eligible for the Vaccine, December 3, 2021



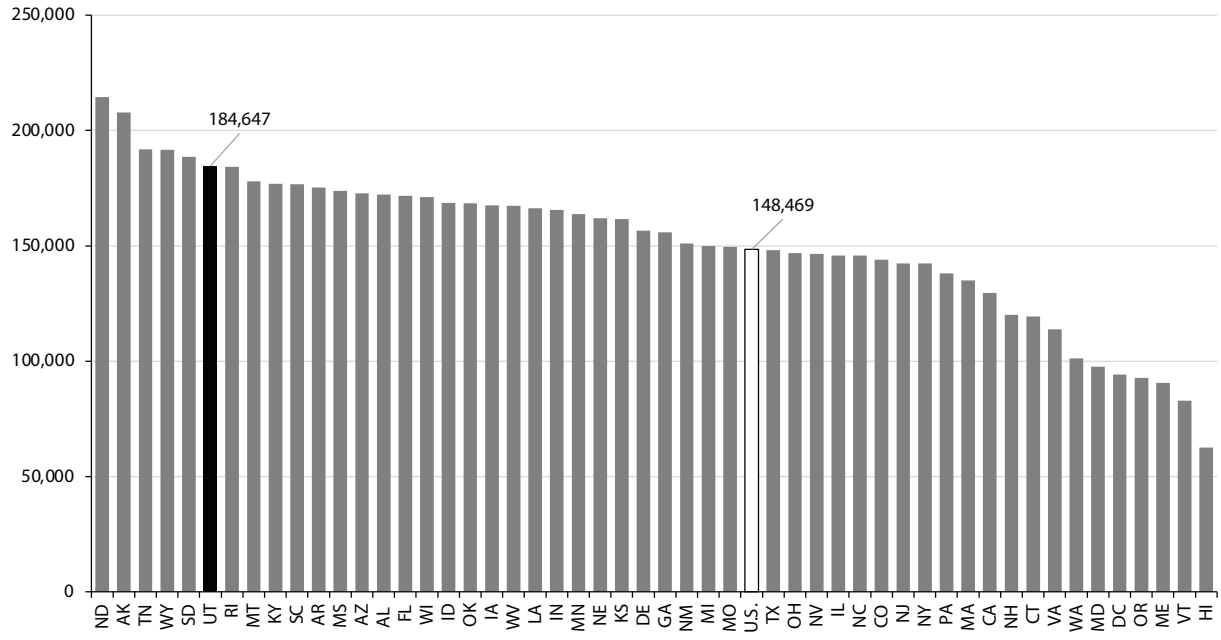
Note: Age-adjusted unvaccinated and vaccinated incidence rates in people eligible for the vaccine since February 1, 2021.
Source: Utah Department of Health COVID-19 Surveillance.

Figure 18.3: Utah COVID-19 Hospitalization Rate Per 1,000 Cases by Race and Ethnicity, December 3, 2021



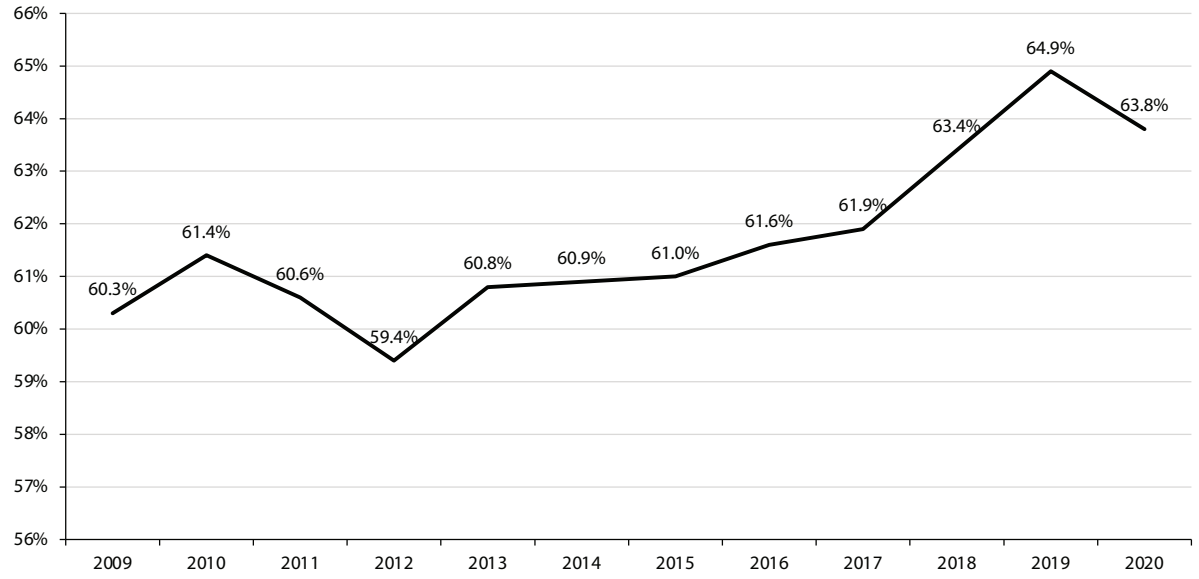
Note: Utah's statewide average hospitalization rate as of December 3, 2021 was 43.4 per 1,000 cases.
Source: Utah Department of Health COVID-19 Surveillance.

Figure 18.4: COVID-19 Cases per 1,000,000 Population by State, December 3, 2021



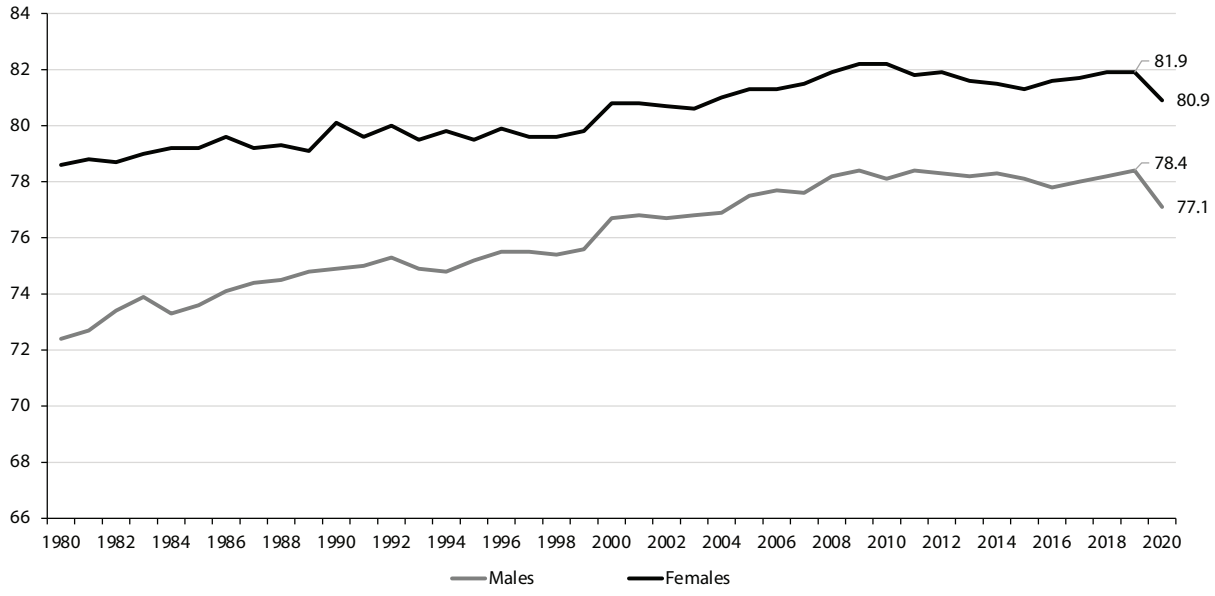
Source: Kaiser Family Foundation estimates based on Johns Hopkins University's COVID-19 Dashboard by the Center for Systems Science and Engineering (CSSE) and 2020 Population data from U.S. Census Bureau.

Figure 18.5: Share of Utah Adults Who Are Overweight or Obese, 2009–2020



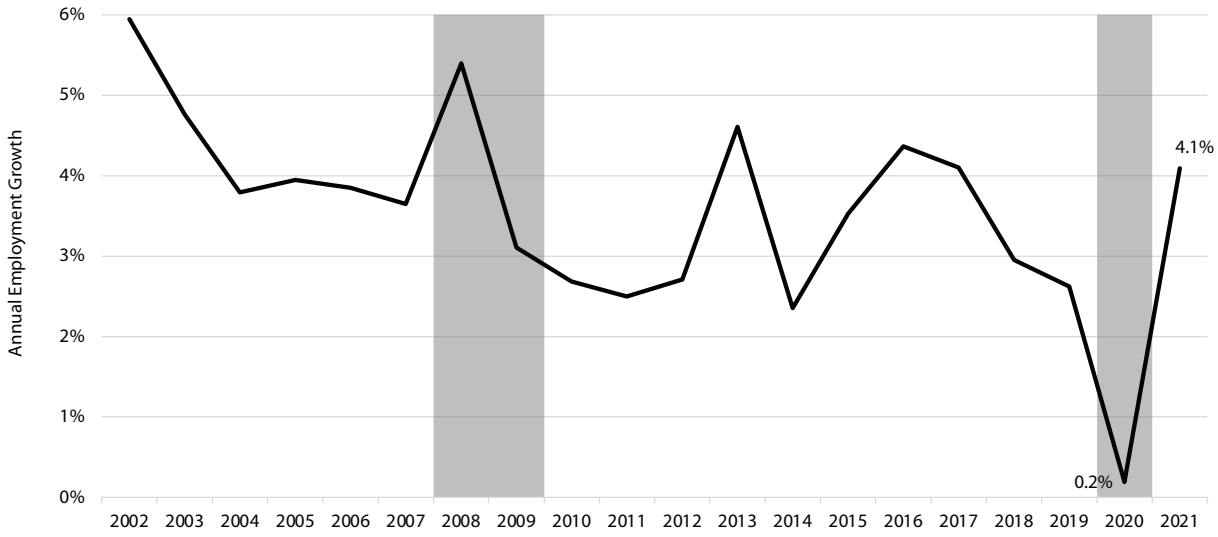
Note: Age-adjusted. Adults age 18 and older. Overweight, but not obese, is defined as a BMI of 25–29; Obese is defined as a BMI of 30 or more.
Source: Utah Behavioral Risk Factor Surveillance System, Office of Public Health Assessment, Utah Department of Health.

Figure 18.6: Utah Life Expectancy at Birth by Gender, 1980–2020



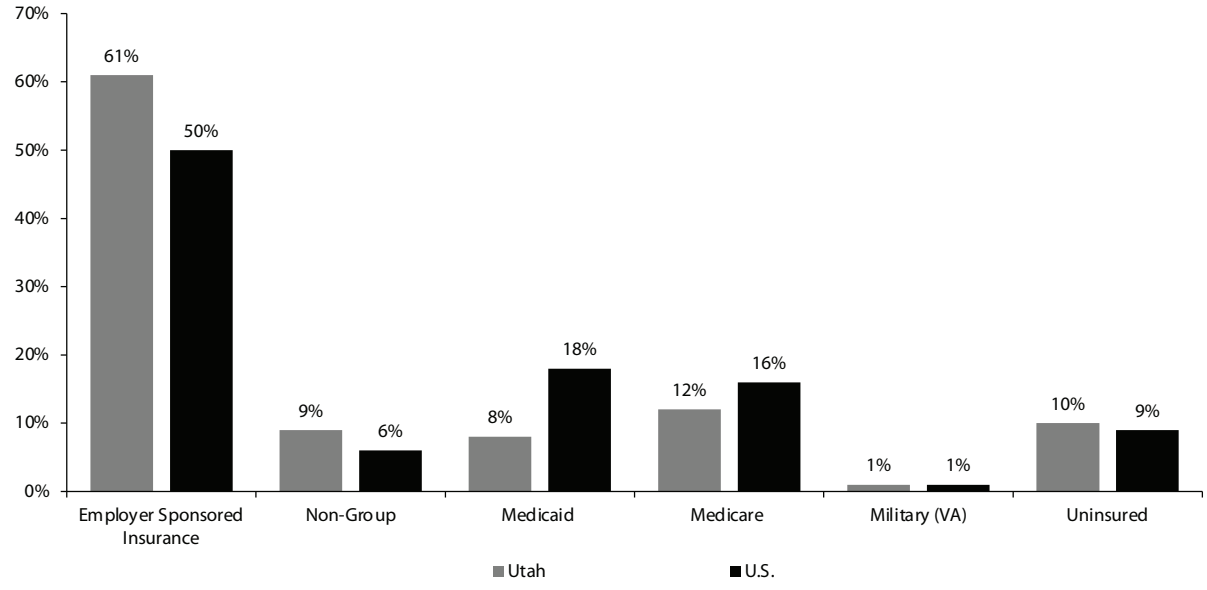
Source: Utah Death Certificate Database, Office of Vital Records and Statistics, Utah Department of Health.

Figure 18.7: Change in Average Employment in Utah's Health Care and Social Assistance Industry for the First Half of Each Year, 2002–2021



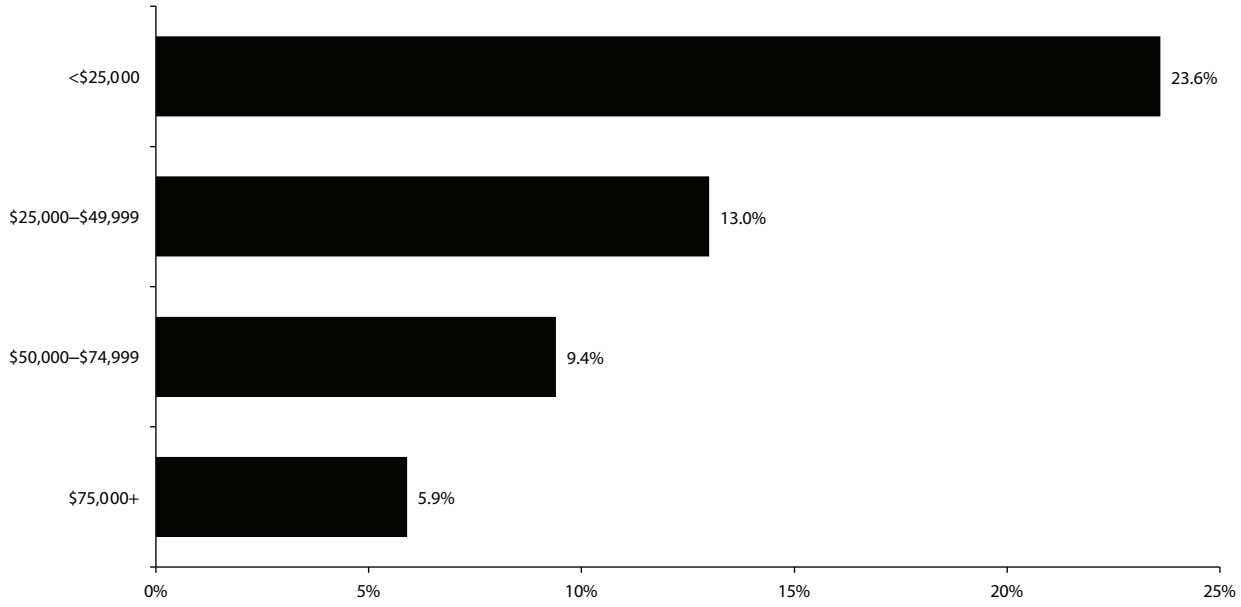
Note: The health care and social assistance sector comprises establishments providing health care and social assistance for individuals. Establishments in this sector deliver services by trained professionals. NBER-dated recessions in gray.
Source: Kem C. Gardner Policy Institute analysis of Utah Department of Workforce Services data and Federal Reserve Bank of St. Louis.

Figure 18.8: Share of Utah's Population with Health Insurance by Coverage Type, 2019



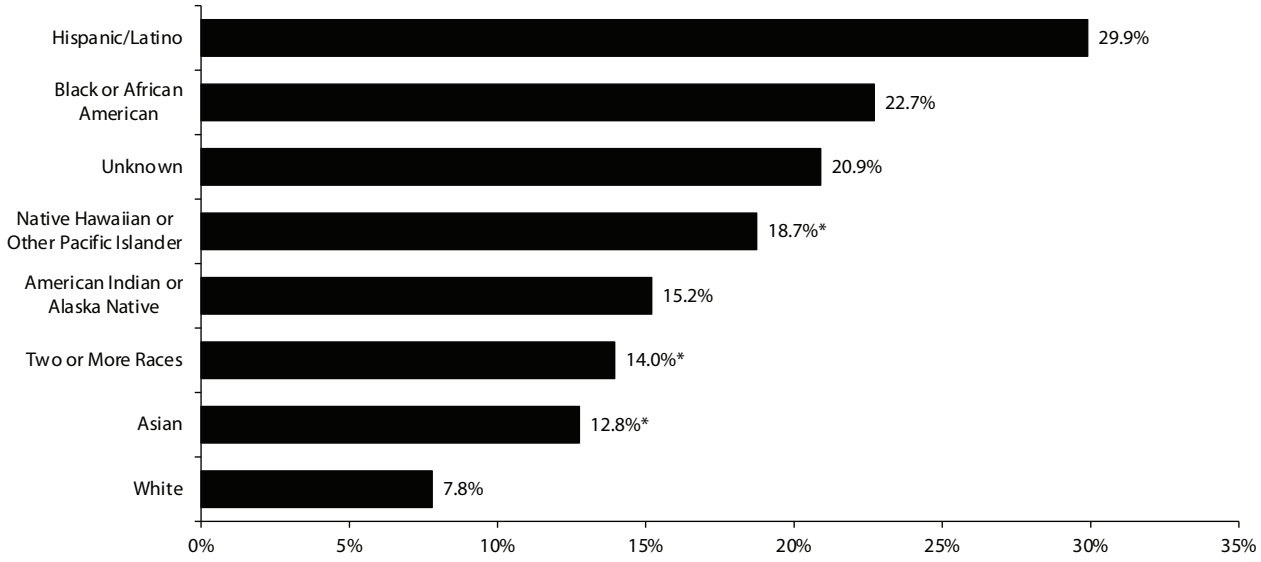
Note: Data may not sum to totals due to rounding. Data may differ from estimates in Tables 18.2 and 18.3 due to different data sources.
Source: Kaiser Family Foundation estimates based on the Census Bureau's American Community Survey 2019 1-Year Estimates.

Figure 18.9: Share of Utah Adults Who Reported Fair or Poor General Health by Income, 2020



Note: Age-adjusted. Adults age 18 and older.
Source: Utah Behavioral Risk Factor Surveillance System, Office of Public Health Assessment, Utah Department of Health.

Figure 18.10: Utah Uninsured Rates for Adults by Race and Ethnicity, 2020



Note: Age-adjusted. Adults age 18 and older. Health insurance is defined as including private coverage, Medicaid, Medicare, and other government programs.
*Use caution when interpreting. Estimates have a coefficient of variation greater than 30% and less than or equal to 50% and are therefore deemed unreliable by Utah Department of Health standards.
Source: Utah Behavioral Risk Factor Surveillance System, Office of Public Health Assessment, Utah Department of Health.

Table 18.1: Prevalence of Common Diseases Among Utah Adults Age 18 Years and Older, 2011–2020

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%	85.0%	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%	88.0%	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%	87.0%	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%	32.1%
2019	21.8%	26.7%	7.7%	12.0%	9.2%	7.3%	4.6%	6.7%	4.2%	4.3%	9.1%	7.8%	16.5%	29.3%	7.1%	4.8%	31.9%	22.2%	85.5%	85.0%	NA	NA
2020	18.7%	25.0%	8.3%	13.3%	8.7%	6.9%	5.1%	6.5%	3.8%	4.8%	9.2%	8.0%	16.0%	30.4%	7.5%	5.5%	NA	NA	89.4%	88.5%	34.0%	34.3%

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. Centers for Disease Control and Prevention, National Center for Chronic Disease Prevention and Health Promotion, Division of Population Health. BRFSS Prevalence & Trends Data [online]. 2015. [accessed Dec 02, 2021].

Table 18.2: Utah's Uninsured Rate by County, 2006–2019

Year	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Beaver	23.6%	22.6%	21.6%	19.5%	20.7%	20.8%	18.7%	18.9%	15.9%	14.6%	12.0%	12.5%	12.4%	13.2%
Box Elder	14.0%	13.3%	14.1%	14.7%	15.0%	14.3%	13.7%	12.7%	11.6%	9.1%	8.4%	8.8%	8.8%	10.1%
Cache	19.8%	18.0%	15.9%	14.8%	15.9%	15.8%	15.1%	14.5%	12.6%	9.5%	9.3%	10.1%	9.8%	9.4%
Carbon	12.1%	11.6%	13.9%	13.3%	13.9%	14.4%	14.4%	12.6%	14.0%	10.9%	9.4%	10.3%	9.2%	10.0%
Daggett	24.1%	23.5%	24.5%	19.4%	18.0%	18.7%	15.9%	17.0%	12.8%	11.2%	9.7%	8.8%	8.5%	9.3%
Davis	11.9%	10.5%	11.8%	11.5%	11.5%	12.0%	10.3%	10.8%	9.6%	8.4%	6.7%	7.0%	6.9%	8.1%
Duchesne	17.0%	16.6%	20.6%	18.2%	18.7%	19.3%	17.1%	16.4%	17.4%	17.1%	13.7%	15.5%	15.4%	14.8%
Emery	16.3%	15.5%	16.2%	14.8%	15.7%	15.4%	14.6%	14.4%	13.7%	10.9%	8.7%	9.1%	8.7%	9.9%
Garfield	20.0%	20.0%	19.6%	17.3%	18.8%	18.1%	18.1%	20.5%	16.9%	15.2%	14.7%	16.3%	14.3%	17.4%
Grand	19.9%	20.5%	25.3%	22.0%	23.2%	23.6%	21.6%	22.1%	18.1%	16.2%	13.9%	13.2%	12.9%	16.4%
Iron	19.7%	19.1%	19.5%	18.5%	22.8%	22.3%	18.3%	19.8%	18.2%	16.2%	11.9%	13.7%	12.1%	12.3%
Juab	13.5%	13.7%	19.3%	15.7%	17.0%	16.1%	14.5%	14.6%	15.0%	12.7%	10.2%	10.6%	10.5%	11.1%
Kane	18.6%	17.7%	19.7%	20.1%	17.7%	16.8%	18.0%	15.6%	14.2%	10.1%	8.6%	9.6%	9.8%	10.2%
Millard	21.6%	17.8%	17.2%	20.3%	23.6%	21.8%	20.3%	20.0%	18.8%	17.5%	13.1%	14.9%	14.1%	15.0%
Morgan	18.3%	16.9%	15.4%	13.1%	12.7%	12.0%	11.3%	10.0%	8.8%	8.2%	6.5%	7.2%	6.9%	7.9%
Piute	26.9%	19.5%	22.2%	22.5%	25.0%	22.9%	22.1%	25.2%	22.4%	16.0%	12.8%	12.4%	14.6%	13.2%
Rich	25.5%	26.2%	22.4%	20.1%	20.8%	18.1%	15.9%	18.4%	14.8%	12.5%	10.2%	11.8%	10.1%	10.6%
Salt Lake	16.6%	16.9%	16.6%	17.0%	17.9%	17.2%	16.9%	16.7%	14.8%	12.2%	10.9%	11.0%	11.8%	11.4%
San Juan	17.5%	18.1%	26.1%	23.7%	22.5%	23.4%	22.9%	20.8%	20.2%	19.9%	17.1%	17.0%	16.2%	17.5%
Sanpete	20.7%	19.6%	19.4%	19.2%	23.0%	20.6%	19.5%	19.8%	18.6%	13.6%	12.7%	12.7%	13.4%	14.8%
Sevier	15.0%	15.1%	17.3%	15.6%	17.0%	18.4%	17.6%	15.5%	16.5%	13.4%	10.6%	12.7%	11.1%	11.8%
Summit	21.1%	18.0%	13.6%	14.6%	16.0%	14.8%	14.9%	14.5%	13.7%	10.9%	9.5%	9.6%	9.2%	10.1%
Tooele	14.0%	13.6%	15.5%	14.3%	13.4%	14.2%	12.5%	12.4%	11.8%	9.2%	8.1%	8.4%	10.1%	10.5%
Uintah	19.6%	19.8%	21.0%	21.0%	20.4%	20.7%	18.1%	16.6%	16.5%	15.7%	12.9%	15.7%	14.8%	13.1%
Utah	18.0%	15.1%	16.0%	14.1%	15.1%	16.0%	14.4%	13.7%	12.1%	10.5%	7.9%	8.1%	8.8%	9.4%
Wasatch	19.5%	18.6%	18.5%	18.9%	21.4%	20.8%	18.9%	19.2%	17.7%	15.7%	12.4%	11.9%	11.2%	11.5%
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%	13.5%	15.0%
Wayne	22.6%	20.6%	19.3%	16.9%	22.2%	24.2%	22.5%	20.7%	16.8%	16.2%	13.6%	15.2%	13.8%	15.7%
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%	10.2%	9.9%
State of Utah	16.7%	15.7%	16.3%	15.9%	16.7%	16.6%	15.7%	15.3%	13.8%	11.6%	9.7%	10.0%	10.4%	10.7%
U.S.	17.1%	16.6%	16.6%	17.3%	17.7%	17.3%	17.0%	16.8%	13.5%	10.9%	10.0%	10.2%	10.4%	11.6%

Note: Uninsured rate is for those age 65 and younger.
Data may differ from estimates in Figure 21.8 and Table 21.3 due to different data sources.
Source: U.S. Census Bureau Small Area Health Insurance Estimates.

Table 18.3: Percent of Utah's Population with Health Insurance by Coverage Type, 2007–2019

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%
2019	4.8%	3.5%	36.2%	15.7%	6.6%	13.2%	9.9%	0.5%	NA	NA	9.7%
2020	4.8%	3.7%	36.2%	14.9%	6.6%	12.6%	11.2%	0.5%	NA	NA	NA

Note: Due to the impact of the COVID-19 pandemic on data collection, the U.S. Census Bureau has not published state-level uninsured estimates for 2020 (Keisler-Starkey and Bunch, 2021). No other estimates were available at the time of publication. The employer-sponsored self-funded membership estimate is based on limited data from commercial insurers and employers. It is not a complete count of the self-funded membership in Utah and should be used with caution. Estimates may not total exactly due to rounding and differences in methodology.

PCN (Primary Care Network) is a limited-benefit health plan offered by the Utah Department of Health to adults who are not traditionally eligible for Medicaid. The PCN program closed on March 31, 2019. Members previously enrolled in PCN were automatically enrolled in Medicaid.

HIP Utah (Utah Comprehensive Health Insurance Pool) was discontinued in 2014 with the Affordable Care Act.

Data may differ from estimates in Figure 21.8 and Table 21.2 due to different data sources.

Source: State of Utah Health Insurance Market Reports.

Table 18.4: Utah's Private Sector Health Care Employment by Facility Type, 2001–2020

Year	Provider Offices					Mental Health Provider Offices			Miscellaneous Health Pract. Offices	Medical Services				Medical Facilities			Hospitals			Health and Medical Insurance Carriers
	Physicians	Dentists	Chiropractors	Podiatrists	Optometrists	Mental Health Physicians	Mental Health Practitioners	Specialty Therapists		Outpatient Care Centers	Medical and Diagnostic Laboratories	Home Health Care Services	Other Ambulatory Health Care Services	Skilled Nursing Care Facilities	Residential Mental Health Facilities	Assisted Living Facilities	General Medical and Surgical Hospitals	Psychiatric and Substance Use Disorder Hospitals	Other Specialty Hospitals	
2001	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
2019	21,084	13,457	1,753	346	1,144	467	1,240	3,319	1,145	3,759	4,886	8,408	2,659	9,161	9,600	7,802	34,476	854	3,994	2,690
2020	21,279	13,333	1,799	349	1,163	381	1,557	3,153	1,202	4,089	5,138	8,319	2,678	8,882	9,941	7,884	34,860	798	3,934	2,848
Avg. Annual % Increase	3.0%	2.9%	3.7%	2.7%	4.5%	5.5%	8.0%	3.7%	7.6%	5.7%	5.5%	5.6%	5.7%	0.2%	4.9%	6.4%	2.3%	2.6%	1.6%	0.3%
2019–2020 % Change	0.9%	-0.9%	2.6%	0.9%	1.7%	-18.4%	25.6%	-5.0%	5.0%	8.8%	5.2%	-1.1%	0.7%	-3.0%	3.6%	1.1%	1.1%	-6.6%	-1.5%	5.9%

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

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Levi Pace, Kem C. Gardner Policy Institute

The life sciences industry supports health care quality in Utah and represents a high-growth, innovative cross-section of the state's economy. Life sciences companies develop, manufacture and distribute pharmaceuticals, medical devices, and related products. The industry includes biotechnology firms, medical laboratories, diagnostics companies, and professional service providers in 1,285 business establishments around the state, as of 2020.[1] Utah's life sciences industry interfaces locally and globally with medical providers, pharmacies, and other customers. The state's employee workforce has an exceptionally high concentration of life sciences companies.

2021 OVERVIEW

The life sciences industry provided 49,281 full-time and part-time jobs in Utah during 2020.[2] Employees at life sciences companies held 85.4% of these jobs, spread across 22 of Utah's 29 counties. Self-employed workers filled the remaining 14.6%. Their combined 2020 earnings from the industry were nearly $4.4 billion. Employment and earnings rose from 45,354 jobs and $3.7 billion in 2018.

In part due to its role in the global pandemic response, Utah employment in the industry jumped by an estimated 7.2% from 2019 to 2020, far exceeding the national average increase of 0.5%.[3] During a period of uncertainty, life sciences companies helped sustain the health care system and buoy up other sectors.

Utah life sciences companies attract substantial investments. Mostly in the first three quarters of 2021, 10 companies raised a combined $1 billion in capital.[4] Previous venture capital amounts were also significant. For example, the industry received just over $4 billion from 2012 to 2017.[5]

Worker Earnings

Life sciences companies offer well-compensated career opportunities in Utah. While the industry directly supplies 2.4% of jobs in the state, its earnings footprint is disproportionately large at 3.6% of all worker earnings in Utah.

At $98,500 per Utah job, average life sciences employee compensation was 46.5% above the average for all other industries. Self-employed life sciences workers earned an average of $33,900 per year, 16.8% above self-employed workers in all other industries. Self-employment income can come in the form of part-time second jobs and early-stage startups, for example.

Industry Composition

Utah's life sciences industry includes four components. The largest in 2020 was "research, testing and medical laboratories" in the service sector. They provided 38.0% of all life sciences jobs and 35.0% of 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 "therapeutics and pharmaceuticals" manufacturing and wholesalers in "biosciences-related distribution." Together, these two components accounted for the remaining 27.9% of jobs and 33.7% of earnings at Utah's life sciences establishments.

1 We define Utah's life sciences industry as all companies in 15 industries and 142 individually selected establishments spread across 30 other industries. The 15 industries' codes in the North American Industry Classification System are NAICS 325411, 325412, 325413, 325414, 334510, 334516, 334517, 339112, 339113, 339114, 339115, 339116, 423450, 423460 and 621511. For methodology details, see "Economic Impacts of Utah's Life Sciences Industry" by the Kem C. Gardner Policy Institute, University of Utah, August 2018. This chapter updates that study.

2 The release of detailed economic data for 2021 is scheduled for April of 2022.

3 Job growth and workforce concentration estimates in this chapter rely on a simplified life sciences industry definition for which annual data are available nationwide. The simplified definition represents an estimated 61% of total industry employment, which is the basis for most information here. For further explanation and state comparisons, see "Growth Trends in Utah's Life Sciences Industry" by the Kem C. Gardner Policy Institute, August 2021.

4 See "Life Sciences Raised $1 Billion in Capital Last Year…" by Jacqueline Mumford, Utah Business, November 17, 2021.

5 See "Life Sciences & Healthcare," Utah Governor's Office of Economic Opportunity, accessed December 2021. https://business.utah.gov/targeted-industries/life-sciences-healthcare/

2022 OUTLOOK

Growth Trends

Utah's life sciences sector has momentum on its path of consistent expansion. From 2007 to 2020, the average annual growth rate in employment was 4.0% among life sciences companies, compared with 1.5% for all other companies in the state. Job growth in the life sciences industry remained positive throughout two economic recessions with contrasting causes and durations.

From 2015 to 2020, life sciences employment in Utah increased by 4.8% per year, on average. This five-year growth rate was the fourth highest of the largest 20 states in terms of total life sciences employment. The health IT and digital health segments have been particularly dynamic.

Workforce Patterns

Among all states in 2020, Utah had the highest workforce concentration in life sciences at 1.9%. Only eight states had more than 1.0% of all employees working at life sciences companies, and the nationwide median was 0.6%. Utah had the 15th most life sciences jobs of any state, which was high for the 31st largest employed workforce in the U.S.

The long-running productivity of life sciences companies depends on Utah's available talent in science and technology fields, its management and entrepreneurial depth, and university research and teaching. Continuing to develop the state's workforce in a competitive life sciences environment depends in part on access to science, technology, engineering and math (STEM) learning and work opportunities by all communities, including women and minority groups.

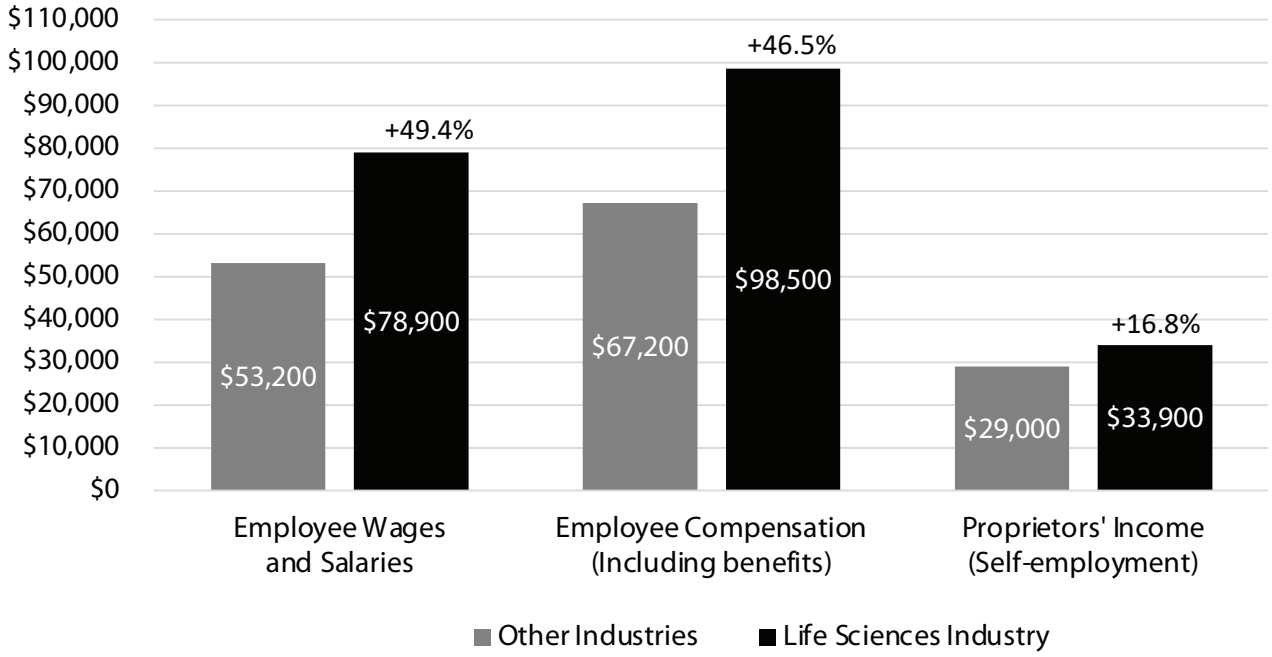
Global Factors

The life sciences industry is susceptible to national and international economic developments, including additional pandemic demand and supply chain exposure. More than half 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 minimize downward volatility for life sciences companies, but the pressures of growth and technological change are considerable.

Summary

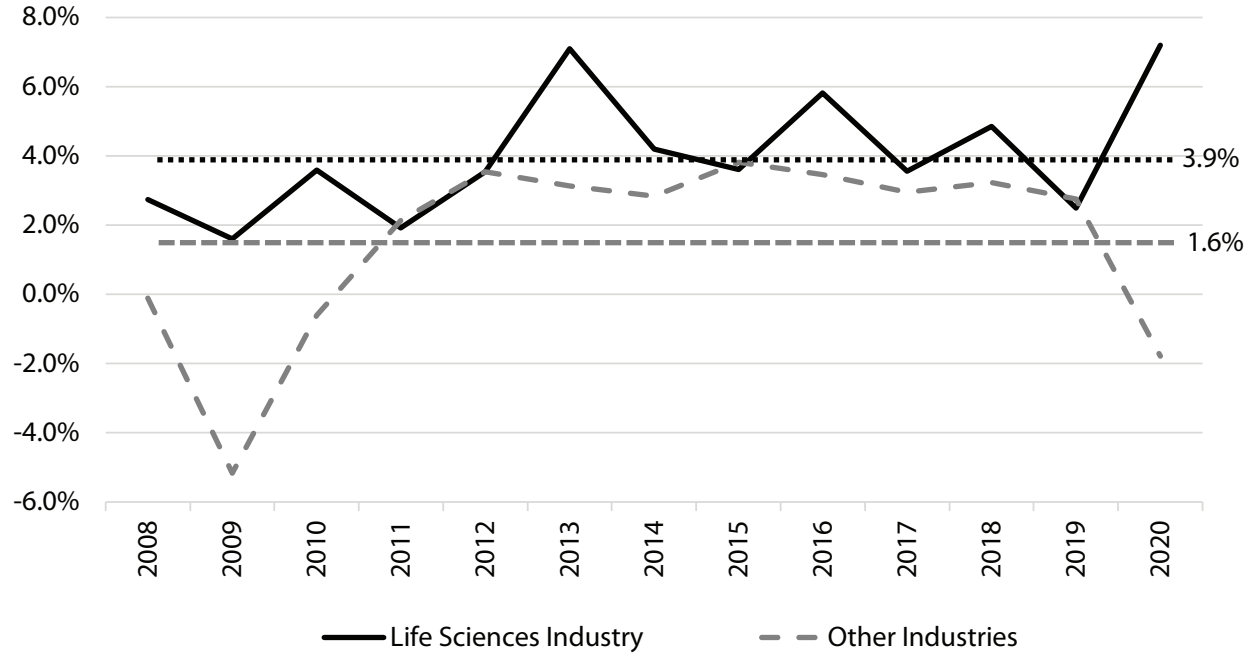
During 2022, the life sciences industry is likely to outperform most sectors in Utah's strong economy. Annual employment growth in the life sciences industry exceeded the average for other industries during nine years since 2007, and life sciences was close behind in the four remaining years. Laboratory work during the pandemic, opportunities in genomics research, medical device connectivity, and data-intensive health research are among the factors calling for continued investments in life sciences workers and technologies. Likely benefits include population health, investor returns, tax revenue, and the livelihoods of people in life sciences jobs in Utah. The state remains well positioned in this strategic industry.

Figure 19.1: Average Annual Earnings per Job in Utah's Life Sciences Industry, 2020



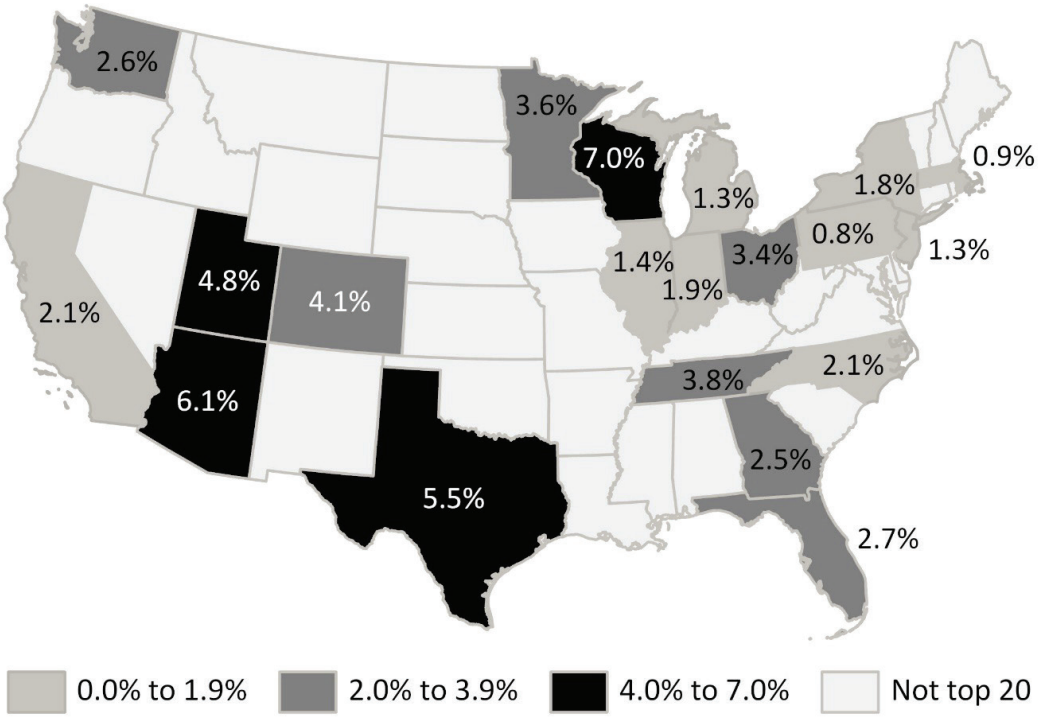
Note: Percentage labels for the life sciences industry indicate the percent difference compared to industries besides life sciences. In the life sciences industry, wages and compensation are for its 42,087 employee jobs, and proprietors' income is for its 7,194 self-employed workers.
Source: Utah Department of Workforce Services and U.S. Bureau of Economic Analysis

Figure 19.2: Annual Employment Growth in Utah's Life Sciences Industry, 2008–2020



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 42,087 employee jobs, and proprietors' income is for its 7,194 self-employed workers.
Source: Utah Department of Workforce Services and U.S. Bureau of Economic Analysis

Figure 19.3: Life Sciences Growth in the Top 20 States, 2015–2020
(Five-Year Average Annual Employment Growth Rate)



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

Table 19.1: Employment in Utah's Life Sciences Industry, 2020
(Number of Jobs)

Industry Group	Employee	Self-Employment	Total	Share
Research, Testing and Medical Laboratories	13,978	4,741	18,719	38.0%
Medical Devices and Equipment	15,438	1,380	16,818	34.1%
Therapeutics and Pharmaceuticals	7,262	393	7,655	15.5%
Biosciences-Related Distribution	5,409	680	6,089	12.4%
Total	42,087	7,194	49,281	100.0%
Share	85.4%	14.6%	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 19.2: Worker Earnings in Utah's Life Sciences Industry, 2020
(Millions of Dollars)

Industry Group	Employee Compensation	Self-Employment Income	Total	Share
Research, Testing and Medical Laboratories	$1,398.2	$136.7	$1,534.9	35.0%
Medical Devices and Equipment	$1,385.8	-$10.8	$1,375.0	31.3%
Biosciences-Related Distribution	$767.4	$78.3	$845.7	19.3%
Therapeutics and Pharmaceuticals	$595.4	$39.6	$635.0	14.5%
Total	$4,146.7	$243.9	$4,390.6	100.0%
Share	94.4%	5.6%	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

Minerals

20

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

2021 OVERVIEW

The Utah Geological Survey (UGS) projects an estimated gross production value of metallic and industrial mineral commodities of $3.8 billion in 2021, a substantial increase from 2020's estimated value of $3.2 billion ($3.4 billion with inflation adjustment). The U.S. Geological Survey reported that the 2020 value of Utah's nonfuel (metallic and industrial) minerals production ranked eighth nationally, accounting for 3.8% of the total U.S. nonfuel minerals production. The UGS's 2021 production values are derived primarily from industry production surveys, corporate quarterly reports, and discussions with mining industry professionals.

The 2021 mineral production value estimate of $3.8 billion includes a metals value of $2.3 billion (61%) and an industrial minerals value of $1.5 billion (39%). Utah's metal production includes copper, molybdenum, gold, iron, magnesium, beryllium, and silver in decreasing order of importance. Utah also produces a long list of industrial mineral commodities including potash, salt, sand and gravel, crushed stone, portland cement, lime, limestone, lithium, phosphate, gilsonite, gypsum, frac sand, and other mineral products.

Rio Tinto's Bingham Canyon open-pit mine is the most significant metal producer in the state. Bingham is the second largest copper mine in the United States, leads Utah in production of copper, gold, and silver, and is the state's only producer of molybdenum. In July 2021, Rio Tinto announced a $108 million investment into studying the feasibility of an underground mine at Bingham, which, if developed, could increase mine life significantly. Currently, the mine life is estimated to reach 2032 due to the $1.5 billion south wall pushback second phase, which commenced this year. The Bingham open pit experienced a slope failure in May 2021 that did not result in any injury or equipment damage, but did slow the transition to higher grade material made accessible in the first phase of the pushback. In September there was a smelter incident at Rio Tinto's refinery near Magna in which molten copper was released, resulting in an immediate shut down of the copper refining stream. However, because mineral production values are based on mined copper, as opposed to refined copper, the smelter shutdown had no impact on the 2021 estimated mineral production value.

Multiple other metal mining operations were active in Utah in 2021, including Utah Iron LLC's resumption of iron mining at the Black Iron mine in Iron County. The Iron Springs mining district, where the mine is located, is the most productive iron district in the western United States. Gold and silver were also mined by Tintic Consolidated Metals LLC from the Trixie mine in the Tintic mining district (Utah County), marking another restart in one of Utah's most prolific mining districts. Current mining at Trixie, the only underground hardrock mine in Utah, intersected a previously unknown high-grade gold ore body, highlighting the potential for future mine expansion. Lisbon Valley copper mine had no active mining in 2021, but re-permitted their mine following the loss of mining permits in 2020 due to an abrupt shutdown and release of their surety bond. Lisbon Valley Mining Company continued reprocessing leach pad material and is pursuing permitting for in-situ mining, which would allow mining of deeper parts of the ore body.

Industrial mineral value from 2020 to 2021 is projected to increase modestly. U.S. Geological Survey data for the first half of 2021 indicate that construction aggregate production in Utah was up nearly 13% compared to the first half of 2020. Construction aggregate, consisting of sand and gravel and crushed stone, is one of the more significant mineral commodities in Utah and is an indicator of the growth or decline of the construction sector. The estimated value of U.S. Magnesium's new lithium production was included for the first time in the UGS's mineral value estimate.

Based on the U.S. Department of the Interior's (DOI) 2018 critical mineral list, Utah produced eight critical minerals in 2021 (beryllium, helium, lithium, magnesium metal, palladium, platinum, potash, and rhenium), and hosts established resources of five more (aluminum, fluorspar, indium, vanadium, and uranium). Beryllium is produced by Materion Resources out of the Spor Mountain mining district. This operation is the global leader in beryllium production. U.S. Magnesium is the only producer of magnesium metal in the United States, but continues to produce below capacity due in part to the 2016 closure of the adjacent titanium plant, an important consumer of magnesium. In 2020, U.S. Magnesium also began producing lithium as a byproduct. Potash, an important fertilizer mineral, was produced by two companies at three locations in the state from evaporite and brine sources. Helium was recovered from oil and gas fields in southeastern Utah. Platinum, palladium, and rhenium are all recovered as byproducts of metal refining at Bingham Canyon, and Rio Tinto has committed $2.9 million to add a tellurium extraction plant. Notable established resources include Blawn Mountain in Beaver County as the largest alunite (aluminum and potash) resource in the country and the West Desert zinc-copper-indium deposit in Juab County as the only known indium resource in the country.

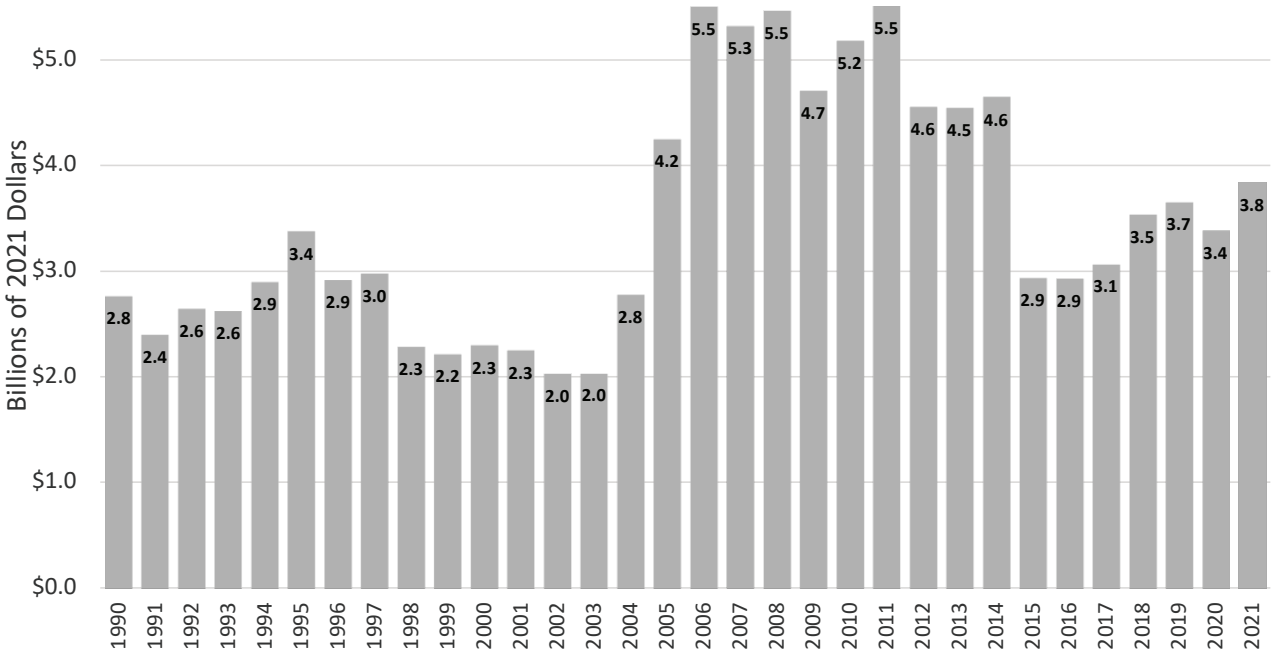
Strong commodity prices drove significant metal exploration activity in 2021. Notable drilling programs have taken place in Beaver, Iron, Juab, Millard, Piute, Tooele, Utah, and Washington Counties, and early stage exploration has been active in Emery, Garfield, Grand, and San Juan Counties. Overall exploration drilling footage increased from 2020 to 2021 and is expected to remain at current levels in 2022. Base and precious metals, particularly copper and gold, remain the primary exploration targets in Utah, though uranium exploration activity increased in 2021.

Recent industrial mineral exploration and development in Utah has focused on fluorspar, lithium, frac sand, and potash. Utah is poised to become the nation's only fluorspar producer as Ares Strategic Mining revives the Lost Sheep mine, Utah's largest historical producer of fluorspar. Due to battery demand, lithium prices have risen again and sparked renewed interest. Compass Minerals, a potash producer on Great Salt Lake, expressed intent to begin lithium production from the lake by 2025. Anson Resources continues to pursue a potential lithium resource in subsurface brines of the Paradox Basin. Anson has re-entered old oil and gas wells in the basin to test lithium concentration in brines with some success. Frac sand exploration is a response to the oil and gas industry's trend of using increasing amounts of sand in hydraulic fracturing of wells, but interest ebbs and flows with the oil and gas market. Several areas in Utah have been investigated for frac sand in recent years, but current interest focuses on the Uinta Basin. After a decade or so of interest in Utah's potash resources, the most advanced project (Sevier Lake) stalled in 2020 due to an inability to secure capital investment and its future remains uncertain. Other potash projects in the state have made little recent progress.

2022 OUTLOOK

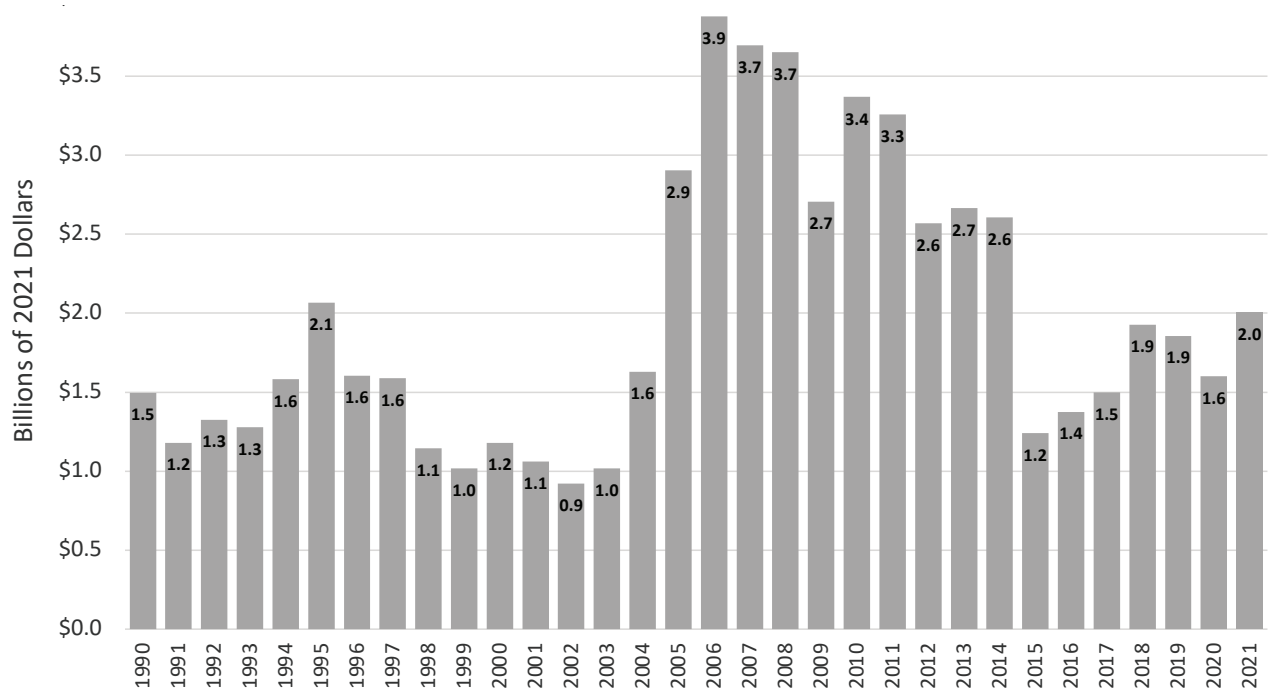
Copper, gold, and silver grades and mining rates are expected to increase at Bingham Canyon in 2022 and drive increased mineral production value. Continued strong commodity prices, particularly short-term gold and long-term copper prices, are expected to fuel robust metal exploration expenditure and support small- to medium-size mining operations such as the Trixie and Black Iron mines in 2022. Major swings in production and commodity prices are not expected for industrial minerals in 2022, but lithium could provide a noticeable bump in value. In summary, the UGS estimates that the production value of Utah's metallic and industrial mineral commodities will be higher in 2022, driven by higher production at the Bingham Canyon mine, startup of smaller-scale base and precious metal operations, and a possible increase in industrial mineral production value. With expected changes to the DOI's critical mineral list, Utah will likely produce seven critical minerals (beryllium, fluorspar, lithium, magnesium metal, palladium, platinum, and tellurium) and have known resources of four more (aluminum, indium, vanadium, and zinc) in 2022. The U.S. Geological Survey has indicated that helium, potash, rhenium, and uranium will be removed from the list.

Figure 20.1: Total Value of Utah's Annual Metallic and Industrial Mineral Production



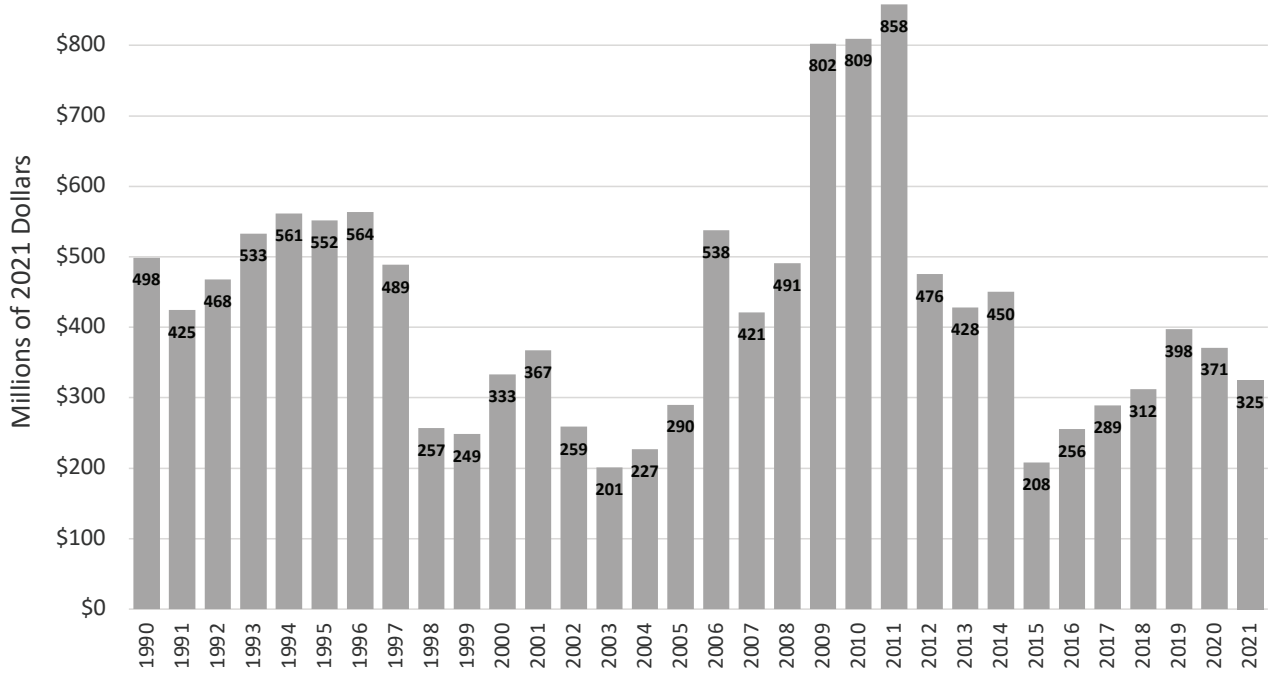
Note: The value presented for 2021 is an estimate
Source: Utah Geological Survey

Figure 20.2: Value of Utah's Annual Base Metal Production



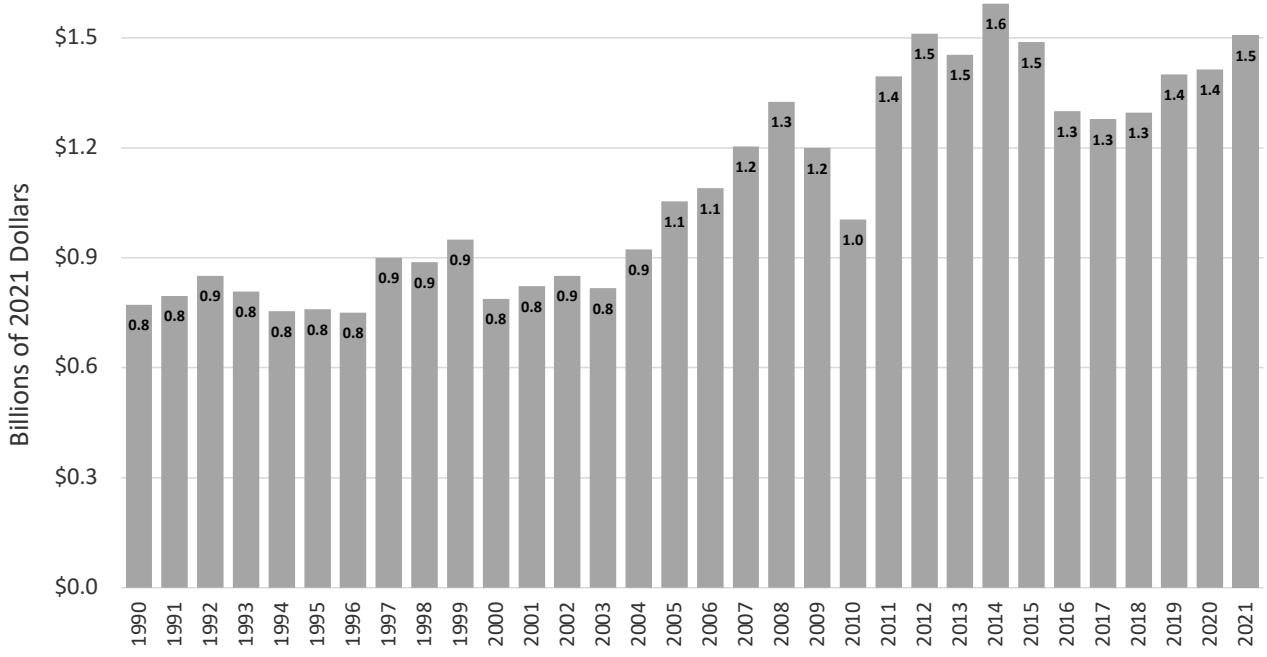
Note: The value presented for 2021 is an estimate
Source: Utah Geological Survey

Figure 20.3: Value of Utah's Annual Precious Metal Production



Note: The value presented for 2021 is an estimate
Source: Utah Geological Survey

Figure 20.4: Value of Utah's Annual Industrial Mineral Production



Note: The value presented for 2021 is an estimate
Source: Utah Geological Survey

Nonprofit Sector

21

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

2021 OVERVIEW

IRS exempt organization data show that Utah has 10,750 nonprofits operating within the state, a 0.40% increase from 2020, with total assets from reporting entities worth $38.2 billion, a 12.9% increase from the year prior.[1] The sector also reported total income of $33.7 billion, a 24.6% increase, and total revenue of $17.3 billion, a 3.3% increase.[2]

The IRS designated 9,029 of the total organizations as 501(c)(3) charitable nonprofit organizations, 476 as 501(c)(6) business leagues and chambers, and 262 as 501(c)(4) social welfare and political organizations. The IRS further classifies with 26 National Taxonomy of Exempt Entity (NTEE) code groups. NTEE codes are attributed to all tax-exempt organizations but not all are classified, with 30% (3,008) unclassified. Over 1,100 (10.5%) are classified as educational; 908 (8.4%) are philanthropy, voluntarism, and grant-making foundations; and 886 (8.2%) are arts, culture, and humanities organizations.[3]

While the IRS reports an increase in revenue at nonprofits from 2020 to 2021, the data reveal that the vast majority of nonprofits in Utah are small. Accordingly, 6,526 nonprofits don't report any income (religious organizations and those with income below $50,000 are not required to report).[4] Beyond that, 3,015 have incomes under $500,000 and 1,209 have incomes of $500,000 and above.[5]

There are nonprofits in every county of Utah, serving the wide variety of human needs and led by people who are driven to make measurable and sustainable impacts.

Nonprofits in Utah continue to serve their clients and fulfill their missions, in spite of the many factors that remain prevalent in communities; namely, the ongoing COVID-19 pandemic and the associated labor shortages. In April 2021, the Utah Nonprofits Association (UNA) surveyed Utah nonprofits about their finances, changes in demand for their services, financial resiliency, and staffing. The results indicate that 74% of nonprofits who responded to the survey have seen an increase in demand for services. While these nonprofits' total revenues decreased by 30% in 2020 compared with 2019, organizations estimated a 10% increase in 2021 compared with 2020. Nonprofits also projected a 37% decline in 2021 staffing compared with 2019.[6]

Data from UNA's comprehensive job board and website traffic illustrate the increase in both jobs to be filled and job seekers in the market. Specifically, 754 jobs were posted in 2019, 813 jobs in 2020 (a 7.8% increase), and, as of November 3, 1,224 jobs have been posted in 2021 (a 50.6% increase).[7] Website traffic to the job board has also increased 33% (20,276 in 2020 and 26,953 as of November 3, 2021).[8]

2022 OUTLOOK

The above data outlines the varied and complex challenges that Utah's nonprofits faced and will continue to experience in the coming year.

While assets increased and federal and state relief continue to make their way to Utah, an important distinction in size and type of organization must be

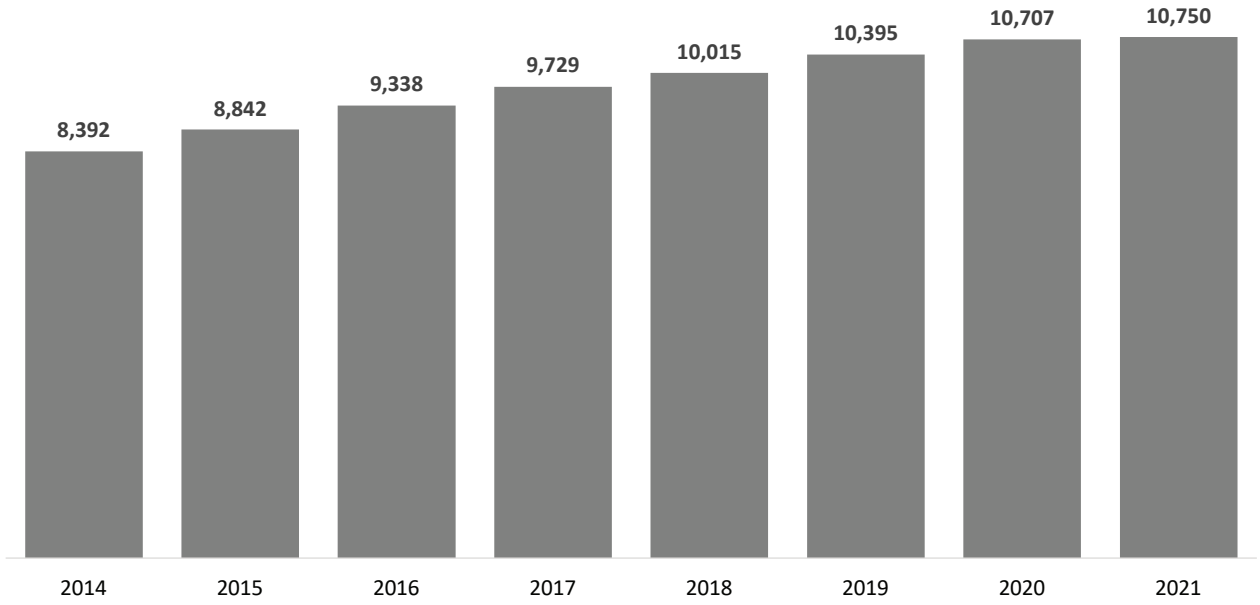
1. "Exempt Organizations Business Master File Extract." *Internal Revenue Service*, October 15, 2020 and October 11, 2021.
2. According to the IRS, income is revenue with expenses added back in and revenue is simply the gross receipts from all sources of revenue.
3. "Exempt Organizations Business Master File Extract." *Internal Revenue Service*, October 11, 2021
4. Annual Exempt Organization Return: Who Must File. *Internal Revenue Service*, September 23, 2021
5. "Exempt Organizations Business Master File Extract." *Internal Revenue Service*, October 11, 2021
6. Pandemic Impact on Utah's Nonprofits include Job Losses and Reduction of Services, *Utah Nonprofits Association*, May 13, 2021
7. UNA Job Board Data, *Utah Nonprofits Association*, 2019, 2020, and November 4, 2021.
8. UNA Google Analytics, *Utah Nonprofits Association*, November 3, 2021.

highlighted. Given the small size—almost 90% have budgets below $500,000—and lower capacity of most of the state's nonprofits, they often have difficulty competing with private sector businesses for pandemic-related aid. Additionally, with over 3,000 organizations that are unclassified by type, it is not fully known how many of the 10,000 are ineligible for any relief or emergency aid. Although money is earmarked in the federal packages for childcare, education, early child tax credits, etc., much of that allocation is not directed specifically toward supporting infrastructure at charitable nonprofits, a critical adhesive in making sure that nonprofits have the revenue to continue to serve communities in need. Regardless if resources are present, either from a drop in revenues or ineligibility for aid, the need in communities continues to be prevalent.

Utah organizations are well positioned to weather a short-term dip in funding. Utah has a long history of being the most charitable state in our nation, giving both financial support and time.

Utah's charitable nonprofits embody the best of our state, providing ways for people to work together for the common good, transforming shared beliefs and hopes into action. As we look to 2022 and beyond, charitable nonprofits will be ever more focused on strategic and collaborative partnerships with the philanthropic community, governments, and municipalities so that nonprofits can continue to meet the ever-growing needs communities face.

Figure 21.1 Number of Utah Tax Exempt Nonprofit Organizations

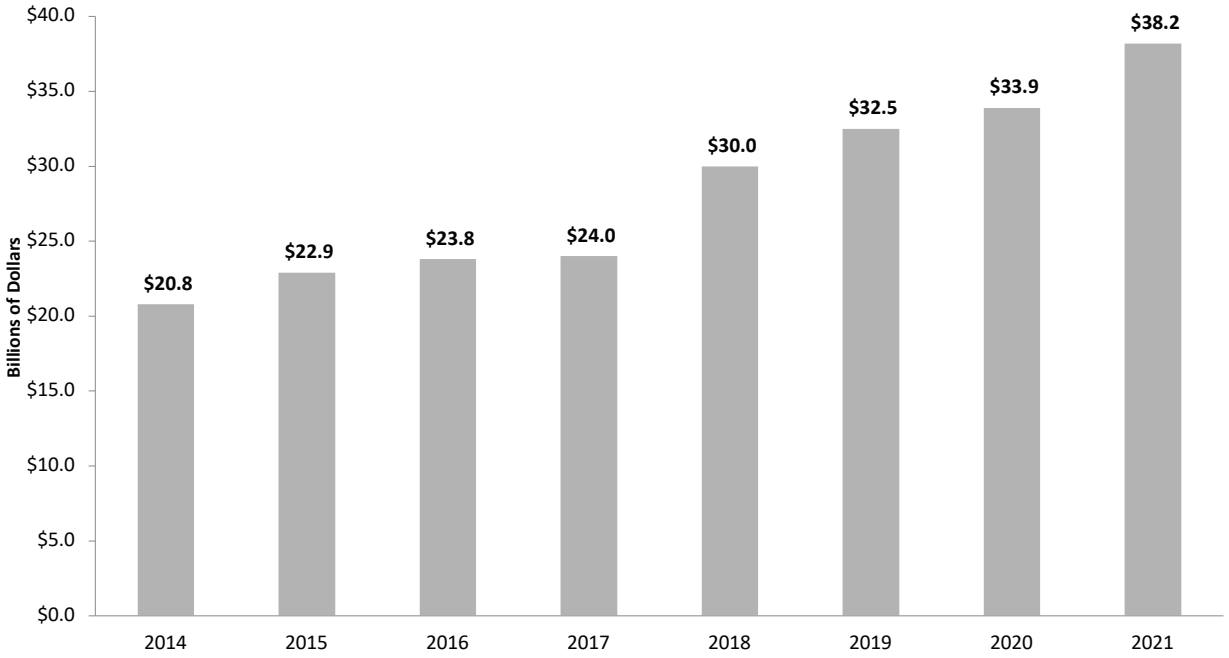


Sources: Internal Revenue Service, (October 2021, October 2020, October 2019, October 2018, July 2017, November 2016, December 2015, December 2014) Exempt Organizations Business Master File

Figure 21.2: Utah's Nonprofit Sector by Total Revenue, Income, and Assets

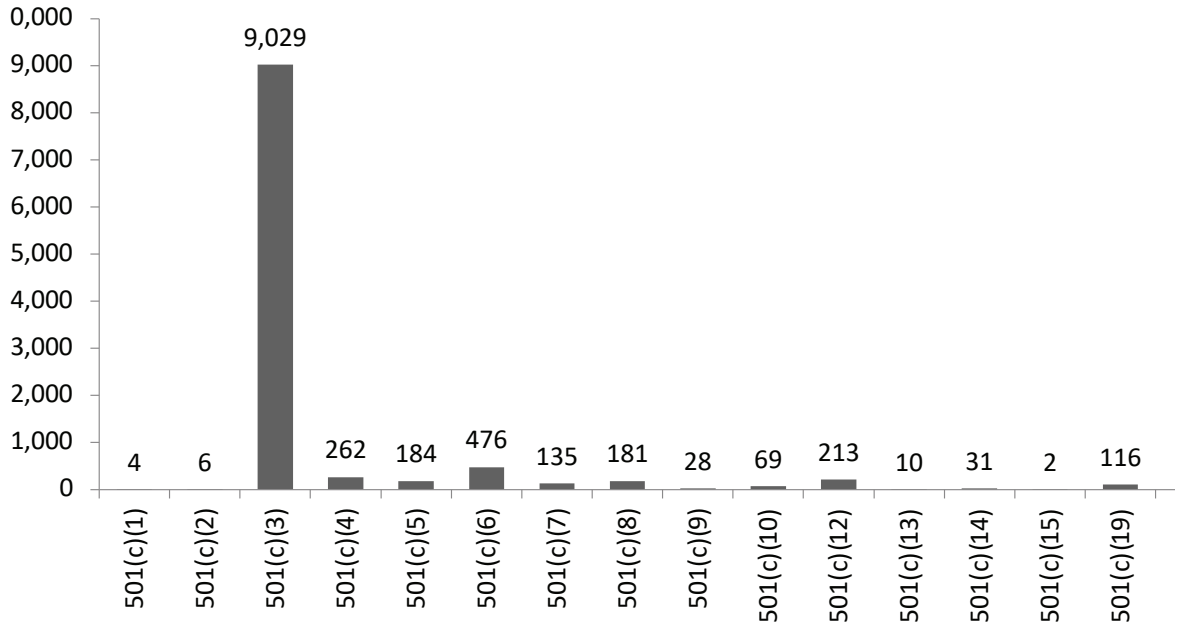
Sources: Internal Revenue Service, (October 2021) Exempt Organizations Business Master File

Figure 21.3: Utah Tax Exempt Nonprofit Organization Assets



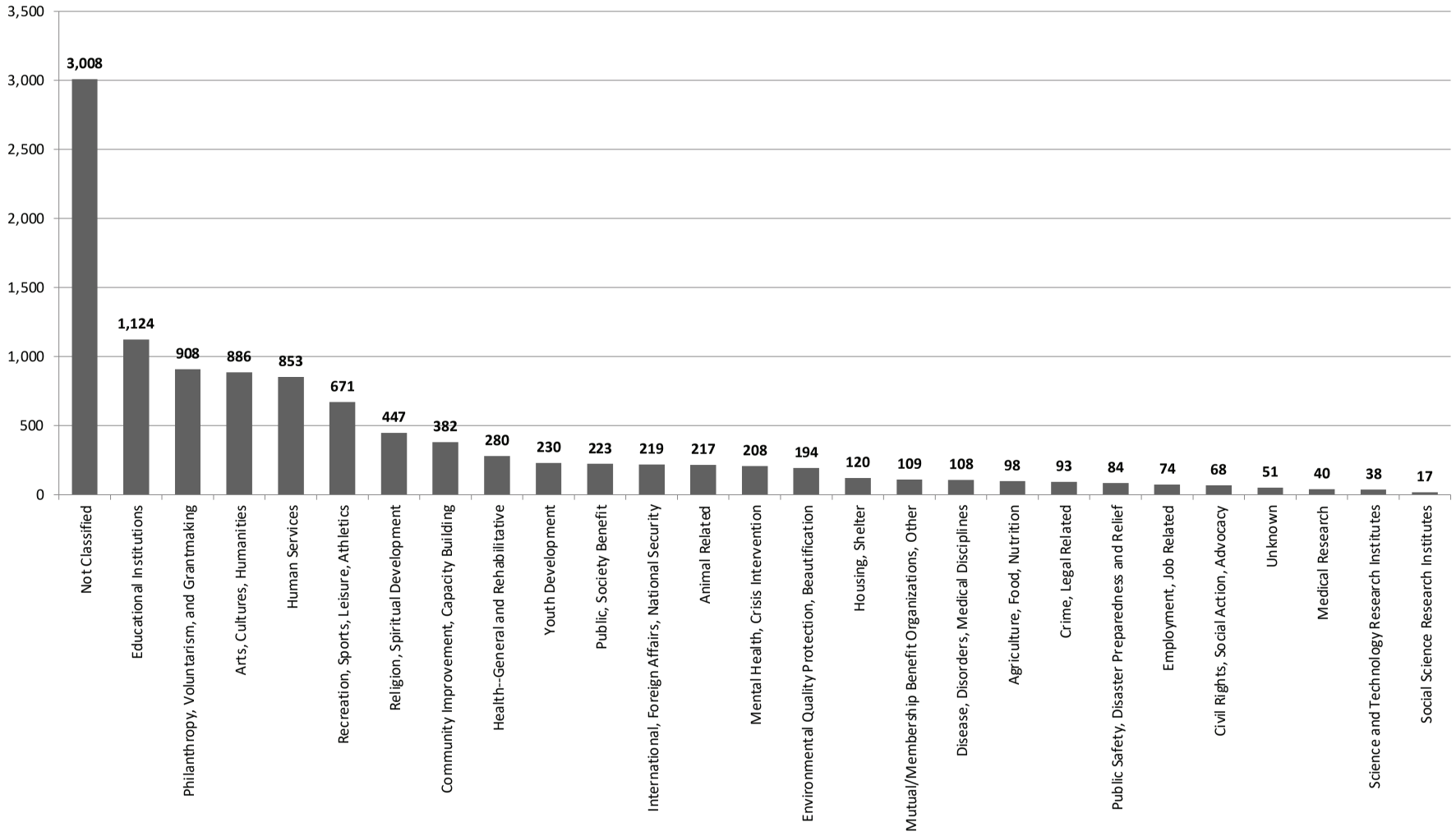
Sources: Internal Revenue Service, (October 2021, October 2020, October 2019, October 2018, July 2017, November 2016, December 2015, December 2014) Exempt Organizations Business Master File

Figure 21.4: Utah's Nonprofit Sector by IRS Subsection Designation



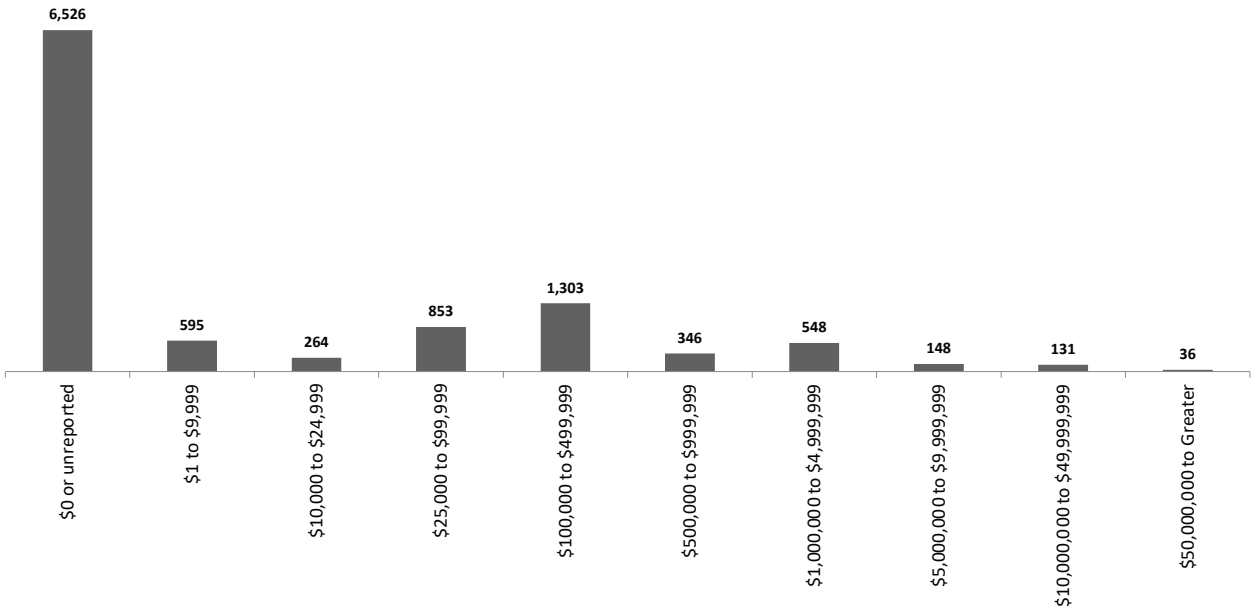
Sources: Internal Revenue Service, (October 2021) Exempt Organizations Business Master File

Figure 21.5: Utah's Nonprofit Sector by NTEE Codes



Sources: Internal Revenue Service, (October 2021) Exempt Organizations Business Master File

Figure 21.6: Utah's Nonprofit Sector by Income Group



Sources: Internal Revenue Service, (October 2021) Exempt Organizations Business Master File

Nonresidential Construction

22

Dejan Eskic, Kem C. Gardner Policy Institute

2021 OVERVIEW

Optimism returned to the commercial real estate market as the economy regained jobs. Last year's total permitted construction value ended in the top-5 values in real dollars. The new normal has seen hybrid activity return to the office space, retail usage is stable, hotel occupancy is trending upwards, and industrial and warehouse space remains as in demand as the housing market. Nearly every employment sector saw positive job growth in 2021.The increase of 4.2% in total employment translated to a record setting year in permitted value. The value of Utah's 2021 permit authorized nonresidential construction is estimated at $2.7 billion, a 5.2% increase over 2020.

Office, Bank, Professional Construction

After a 45.1% drop in permitted construction value in 2020, the office sector bounced back in 2021, increasing in value by 19.5%. The total permitted construction value for office, bank, and professional buildings in 2021 is estimated at $454.5 million, a level of activity more in line with what was experienced from 2014 to 2018. Office using employment such as financial services and professional and business services sectors saw positive job growth in 2021, leading to an overall positive outlook for the sector. However, the hybrid office/work-from-home model has put this real estate sector at a crossroads as occupiers are still deciding how to approach future space needs.

Retail, Mercantile, Restaurant Construction

The retail sector has experienced a mixed recovery. However, retail sales continue to increase and new construction activity is steady. The sector is estimated to permit $154.8 million in construction value in 2021, a 15.5% decrease compared with last year. It is important to note that the 2021 construction value is slightly greater than what occurred in 2018 and 2019.

Industrial, Warehouse, Manufacturing Construction

The industrial, warehouse, and manufacturing sector continues to dominate commercial construction activity. The sector surpassed its record-setting 2020 with a 47.2% increase in permitted construction value in 2021, totaling $1.097 billion. The increase in logistics warehousing and retail distribution and storage space continues to push demand to a new record.

Structures Other Than Buildings

Structures other than buildings is a broad category and fluctuates each year. The sector experienced an 8.2% decrease in 2021. Permitted construction value in 2021 is estimated at $305.5 million—a figure that is still 53.7% higher than the 10-year annual average of $198.8 million.

Remaining Nonresidential Buildings

Twelve individual building types constitute this sector; together, they accounted for $688.6 million in 2021 permitted construction value, a 25.7% decrease over 2020. It is important to note that last year's value of $926.4 million was the second highest in terms of permitted value. Additionally, in 2021 the hotel sector saw its lowest year for construction activity. This significantly contributed to the decline for the remaining nonresidential sector. However, hospital construction experienced a 4.2% increase this year.

2022 OUTLOOK

The 2022 forecast for the value of permit authorized nonresidential construction in Utah is $2.7 billion, remaining unchanged from 2021. The positive employment growth expected across all industries will continue to keep commercial activity at a record pace. However, supply chain issues are causing material delays in the construction industry. Additionally, the lack of skilled construction labor is restricting some of the potential. The inflationary sentiment in the economy has spurred further interest in commercial real estate.

The 2022 value of permit authorized nonresidential construction is forecast to grow 4.5% in the office-bank-professional sector; decline by 9.6% in the retail-mercantile-restaurant sector; and a 0.3% increase in the industrial-warehouse-manufacturing sector.

Table 22.1: Nonresidential Construction Activity

Year	Value of Office/Bank/ Professional Construction (millions)	Value of Retail/ Mercantile/ Restaurant Construction (millions)	Value of Industrial/ Warehouse/ Manufacturing Construction (millions)	Value of Structures Other Than Buildings Construction* (millions)	Value of Remaining Nonres. Buildings Construction** (millions)	Total Value of Nonresidential Construction (millions)	Year-Over % Change
2000	$212.5	$192.2	$191.0	$44.4	$572.8	$1,213.0	
2001	$166.7	$182.2	$133.1	$39.2	$448.7	$969.8	-20.0%
2002	$184.2	$144.2	$85.0	$47.4	$436.3	$897.2	-7.5%
2003	$110.9	$205.6	$165.3	$32.8	$503.0	$1,017.5	13.4%
2004	$145.7	$212.7	$133.6	$62.8	$535.2	$1,089.9	7.1%
2005	$218.9	$164.6	$228.9	$58.7	$546.7	$1,217.8	11.7%
2006	$299.5	$284.2	$295.2	$75.4	$634.2	$1,588.4	30.4%
2007	$399.8	$267.9	$434.8	$164.2	$784.8	$2,051.4	29.1%
2008	$249.8	$358.1	$449.0	$102.4	$759.8	$1,919.1	-6.5%
2009	$104.6	$123.6	$356.0	$43.5	$428.4	$1,056.1	-45.0%
2010	$127.1	$94.2	$127.4	$67.7	$508.8	$925.1	-12.4%
2011	$414.2	$104.6	$324.8	$63.6	$549.3	$1,456.5	57.4%
2012	$114.0	$133.7	$235.3	$54.1	$483.2	$1,020.2	-30.0%
2013	$214.9	$145.3	$176.8	$46.3	$522.6	$1,106.0	8.4%
2014	$354.5	$194.5	$270.3	$71.7	$584.9	$1,475.9	33.4%
2015	$442.0	$155.7	$502.4	$330.6	$645.9	$2,076.5	40.7%
2016	$380.7	$279.1	$289.1	$413.4	$1,317.8	$2,680.1	29.1%
2017	$489.1	$224.8	$405.9	$264.5	$896.3	$2,280.6	-14.9%
2018	$629.1	$152.5	$454.2	$188.0	$742.7	$2,166.5	-5.0%
2019	$693.2	$154.3	$672.2	$353.7	$722.5	$2,595.9	19.8%
2020	$380.3	$183.1	$744.9	$332.7	$926.4	$2,567.4	-1.1%
2021e	$454.5	$154.8	$1,096.6	$305.5	$688.6	$2,700.0	5.2%
2022f	$475.0	$140.0	$1,100.0	$300.0	$685.0	$2,700.0	-0.0%

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

Real Estate and Residential Construction 23

James A. Wood, Kem C. Gardner Policy Institute

2021 OVERVIEW

In 2021, the value of permit-authorized construction in Utah was $12.25 billion, an all-time high, in both current and 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, highways, prisons, and schools.

Residential Construction

Sixty-three percent of the $12.25 billion in total construction value was for residential construction activity. The value of residential construction in 2021 was $7.7 billion, 12.8% higher than the previous year. The strong growth in value reflects the 10.1% increase in residential permits issued for new units. The number of residential permits issued in 2021 was 35,500 compared to 32,237 in 2020. Historically low interest rates, due to the Federal Reserve's response to COVID-19, have brought buyers into the market and have led to one of the hottest housing markets on record. The annual average interest rate in 2021 was 2.94%, the first time the annual rate has been below 3.0%.

The boom in multifamily (apartments, condominiums, and townhomes) construction continued in 2021, but there was a shift in type of multifamily permits. Apartment permits led the multifamily sector with an increase of 36.0%. In 2021, the number of permits for apartment units totaled 12,000, almost one-third of all residential building permits issued and nearly double the number of permits for condominiums. For the third consecutive year, multifamily units exceeded single-family, and 2021 marked only the fifth time in Utah's housing history that multifamily units outnumbered single-family units. Multifamily units totaled 18,500, accounting for 52.0% of all residential units in 2021. The number of multifamily units increased from 16,002 in 2020 to 18,500 in 2021, a gain of 15.6%.

As mentioned, apartment construction drove the strong performance of the multifamily sector in 2021. Since the beginning of the residential boom in 2014, 57,000 permits have been issued for apartment units statewide and 39,000 for condominiums. Apartment and condominiums combined account for 49% of all residential building permits issued since 2014.

Single-family permits increased by 5.0% in 2021 to 16,700 units, the highest level since 2006 amidst the run-up to the Great Recession. The strong demand for housing has led to an increase in the price of a new single-family home. According to Metrostudy, the median sales price of a new, detached, single-family home in the Greater Salt Lake Area was $465,000 in 2021, an increase of 36.0% since 2015.

2022 OUTLOOK

The value of permit-authorized construction in Utah in 2022 is forecast at $12.5 billion, a slight 1.0% increase from 2021. The number of residential units is forecast at 36,000 units, a 1.0% increase over the 35,500 in 2021. The value of residential construction is projected to hold steady at about $8.0 billion. The value of nonresidential construction and additions, alterations, and repairs will also likely see levels of construction activity very close to 2021. Nonresidential construction value is forecast at $2.7 billion, the same as 2021. The value of additions, alterations, and repairs is forecast at $1.8 billion, a decline of $50 million.

Table 23.1: Residential and Nonresidential Construction Activity

Year	Single-Family Units	Multi-Family Units	Mobile Homes/ Cabins	Total Units	Value (nominal millions)			
					Residential	Nonresidential	Add., Alt., and Repairs	Total
1970	5,962	3,108	na	9,070	$117.0	$87.3	$18.0	$222.3
1971	6,768	6,009	na	12,777	176.8	121.6	23.9	322.3
1972	8,807	8,513	na	17,320	256.5	99.0	31.8	387.3
1973	7,546	5,904	na	13,450	240.9	150.3	36.3	427.5
1974	8,284	3,217	na	11,501	237.9	174.2	52.3	464.4
1975	10,912	2,800	na	13,712	330.6	196.5	50.0	577.1
1976	13,546	5,075	na	18,621	507.0	216.8	49.4	773.2
1977	17,424	5,856	na	23,280	728.0	327.1	61.7	1,116.8
1978	15,618	5,646	na	21,264	734.0	338.6	70.8	1,143.4
1979	12,570	4,179	na	16,749	645.8	490.3	96.0	1,232.1
1980	7,760	3,141	na	10,901	408.3	430.0	83.7	922.0
1981	5,413	3,840	na	9,253	451.5	378.2	101.6	931.3
1982	4,767	2,904	na	7,671	347.6	440.1	175.7	963.4
1983	8,806	5,858	na	14,664	657.8	321.0	136.3	1,115.1
1984	7,496	11,327	na	18,823	786.7	535.2	172.9	1,494.8
1985	7,403	7,844	na	15,247	706.2	567.7	167.6	1,441.5
1986	8,512	4,932	na	13,444	715.5	439.9	164.1	1,319.5
1987	6,530	755	na	7,285	495.2	413.4	166.4	1,075.0
1988	5,297	418	na	5,715	413.0	272.1	161.5	846.6
1989	5,197	453	na	5,650	447.8	389.6	171.1	1,008.5
1990	6,099	910	na	7,009	579.4	422.9	243.4	1,245.7
1991	7,911	958	572	9,441	791.0	342.6	186.9	1,320.5
1992	10,375	1,722	904	13,001	1,113.6	396.9	234.8	1,745.3
1993	12,929	3,865	1,010	17,804	1,504.4	463.7	337.3	2,305.4
1994	13,947	4,646	1,154	19,747	1,730.1	772.2	341.9	2,844.2
1995	13,904	6,425	1,229	21,558	1,854.6	832.7	409.0	3,096.3
1996	15,139	7,190	1,408	23,737	2,104.5	951.8	386.3	3,442.6
1997	14,079	5,265	1,343	20,687	1,943.5	1,370.9	407.1	3,721.5
1998	14,476	5,762	1,505	21,743	2,188.7	1,148.4	461.3	3,798.4
1999	14,561	4,443	1,346	20,350	2,238.0	1,195.0	537.0	3,970.0
2000	13,463	3,629	1,062	18,154	2,140.1	1,213.0	583.3	3,936.4
2001	13,851	5,089	735	19,675	2,352.7	969.8	562.8	3,885.3
2002	14,466	4,149	926	19,541	2,491.0	897.2	393.0	3,781.2
2003	16,515	5,555	766	22,836	3,046.4	1,017.5	497.0	4,560.9
2004	17,724	5,853	716	24,293	3,552.6	1,089.9	476.0	5,118.5
2005	20,912	6,562	811	28,285	4,662.6	1,217.8	707.6	6,588.0
2006	19,888	5,658	776	26,322	4,955.5	1,588.4	865.3	7,409.2
2007	13,510	6,290	739	20,539	3,963.2	2,051.4	979.7	6,994.3
2008	5,513	4,544	546	10,603	1,877.0	1,919.1	781.2	4,577.3
2009	5,217	4,951	320	10,488	1,674.0	1,056.1	660.1	3,390.2
2010	5,936	2,890	240	9,066	1,667.0	925.1	672.0	3,264.1
2011	5,391	3,518	176	9,085	1,769.7	1,456.5	846.4	4,072.5
2012	7,655	4,108	156	11,919	2,205.0	1,020.2	728.9	3,954.0
2013	9,858	5,008	143	15,009	3,087.1	1,106.0	785.1	4,978.2
2014	8,715	9,864	231	18,810	3,390.4	1,475.9	1,034.5	5,900.8
2015	9,940	7,143	211	17,294	3,819.2	2,076.5	1,006.4	6,902.1
2016	10,692	9,170	202	20,064	4,082.0	2,680.1	1,624.2	8,386.2
2017	12,146	10,530	326	23,002	4,696.1	2,280.6	1,214.6	8,191.3
2018	12,947	11,059	239	24,245	5,153.0	2,166.5	1,136.0	8,455.5
2019	11,985	15,365	260	27,610	5,800.2	2,595.9	1,413.7	9,809.8
2020	15,919	16,002	316	32,237	6,785.2	2,567.3	1,876.7	11,229.2
2021e	16,700	18,500	300	35,500	7,700.0	2,700.0	1,850.0	12,250.0
2022f	17,150	18,500	350	36,000	8,000.0	2,700.0	1,800.0	12,500.0

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

Table 23.2: Average Rates for 30-Year Mortgages

Year	Mortgage Rate	Year	Mortgage Rate	Year	Mortgage Rate
1968	7.03%	1986	10.18%	2004	5.84%
1969	7.82%	1987	10.19%	2005	5.87%
1970	8.35%	1988	10.33%	2006	6.40%
1971	7.55%	1989	10.32%	2007	6.38%
1972	7.38%	1990	10.13%	2008	6.10%
1973	8.04%	1991	9.25%	2009	5.04%
1974	9.19%	1992	8.40%	2010	4.69%
1975	9.04%	1993	7.33%	2011	4.45%
1976	8.86%	1994	8.36%	2012	3.66%
1977	8.84%	1995	7.95%	2013	3.98%
1978	9.63%	1996	7.81%	2014	4.17%
1979	11.19%	1997	7.60%	2015	3.85%
1980	13.77%	1998	6.95%	2016	3.65%
1981	16.63%	1999	7.43%	2017	3.99%
1982	16.09%	2000	8.06%	2018	4.54%
1983	13.23%	2001	6.97%	2019	3.94%
1984	13.87%	2002	6.54%	2020	3.11%
1985	12.42%	2003	5.80%	2021*	2.94%

Note: *through November
Source: Freddie Mac

Table 23.3: Housing Price Index for Utah

Year	Index	Year-Over Change	Year	Index	Year-Over Change
1992	133.1	6.5%	2007	376.5	12.2%
1993	147.7	10.9%	2008	371.8	-1.2%
1994	172.2	16.6%	2009	342.4	-7.9%
1995	192.5	11.8%	2010	321.1	-6.2%
1996	209.2	8.7%	2011	303.9	-5.3%
1997	222.0	6.1%	2012	308.6	1.5%
1998	233.4	5.1%	2013	329.9	6.9%
1999	236.2	1.2%	2014	349.1	5.8%
2000	238.6	1.0%	2015	368.5	5.6%
2001	248.9	4.3%	2016	395.1	7.2%
2002	252.2	1.3%	2017	429.2	8.6%
2003	256.4	1.7%	2018	468.8	9.2%
2004	264.5	3.1%	2019	503.5	7.4%
2005	289.8	9.6%	2020	540.7	7.4%
2006	335.5	15.7%	2021	667.7	23.5%

Note: Four-quarter average; 2021 is three-quarter average. Not seasonally adjusted; purchase only.
Source: Federal Housing Finance Agency

Travel and Tourism

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2021 OVERVIEW

In 2021, Utah's travel and tourism economy continued its recovery after being significantly impacted by the COVID-19 pandemic. This year, COVID vaccine access and fewer travel restrictions led to increased airline bookings and overall travel. While Utah visitor spending and visitation trends returned to—if not surpassed—2019 baseline trends, tourism-related employment continued to lag.

From January to September 2021, transient room tax revenue had increased 66.1% from 2020 and 17.9% from 2019. Similarly, both short term leasing tax and restaurant tax were up from 2020 (44.4% and 20.0%, respectively), and had either matched or surpassed 2019 revenues for the same period. During the first three quarters of 2021, 28 of Utah's 29 counties experienced year-over increases in county transient room tax revenue; likewise, 26 counties had exceeded 2019 transient room tax collections for the same time frame. Year-over taxable leisure and hospitality sales increased 42.0% during the first two quarters of 2021 and were 13.4% higher than 2019 baseline sales.

During the first two quarters of 2021, there was an 11.0% year-over increase in Utah's private leisure and hospitality sector jobs. However, 2021 private leisure and hospitality employment continued to lag (-4.1%) compared with 2019 baseline employment.

In 2021, the Utah Office of Tourism (UOT) awarded more than $4.7 million in traditional cooperative marketing matching funds and over $500,000 in Forever Mighty program matching funds to 22 counties statewide. The cooperative program now allows a portion of every application to include either 15% of the total project cost or up to $35,000, whichever amount is greater, to go towards in-state marketing. UOT established this temporary initiative to assist in building back Utah's tourism economy following the pandemic.

The UOT designed the Forever Mighty pilot program to encourage Utah destinations and organizations to support responsible travel campaigns and initiatives. The purpose of this program is to leverage state and partner funding to elevate Forever Mighty messages to travelers and encourage thoughtful behaviors that preserve Utah's natural wonders and enrich its communities.

In addition to its winter ski/snowboard campaign, UOT encouraged visitation to southern Utah in winter and spring by promoting national park regions, including less-visited destinations, as a way to attract greater year-round visitation. Urban and Northern Utah destinations were also featured in an effort to spread visitation throughout the state.

UOT's Forever Mighty responsible tourism messaging was integral to all campaigns. In fact, the tourism office has formed relationships with Leave No Trace and Tread Lightly to help refine and distribute effective messaging that encourages responsible visitation for all who want to recreate in Utah's outdoors.

Utah ski resorts reported a record number of skier days (5.3 million) during the 2020-2021 season despite operating under pandemic conditions. Ski resort success was due partly to the implementation of creative client safety measures, including mask mandates, increased takeout dining options, and social distancing policies. According to resort managers, 2020-2021 skier turnout was heavily local with many at-home workers taking advantage of season passes and off-peak ski days.

While Utah state park visitation fared better than national park visitation during the pandemic, both state and national park visitation remained strong during the first half of 2021. From January to August, Utah state parks experienced a 13.0% year-over increase in visitation and national parks experienced an 87.1% increase. Compared with the same time frame in 2019, state parks were up 41.9% and national parks up 5.9%.

Despite the pandemic's effects on Utah's leisure and hospitality sector, in 2021 Utah's statewide tourism economy rebounded quickly. In fact, even urban tourism, which was impacted significantly by the pandemic, began recovering in 2021. From January to September, year-over downtown Salt Lake City hotel occupancy rates were up 47.4% and Salt Lake County transient room tax revenues were up 32.6%.

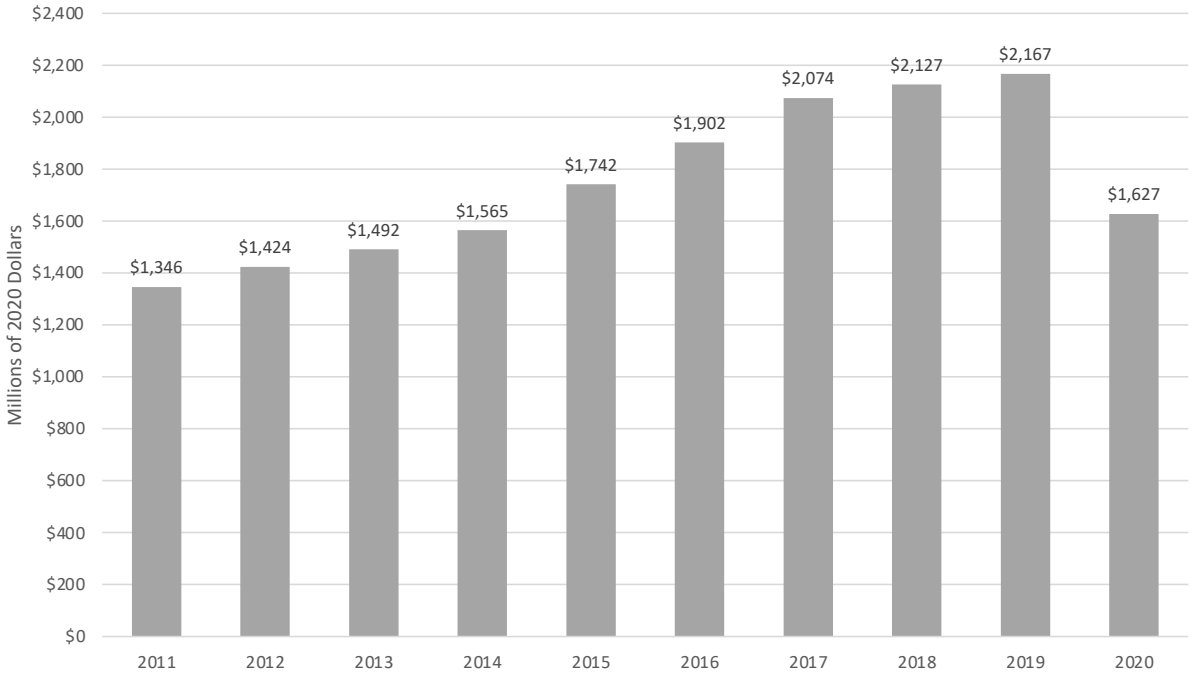
Currently, construction of the Hyatt Regency, Salt Lake's newest convention hotel, is in its final stages with the hotel's grand opening planned for fall 2022. In addition, the new SLC airport is fully functional with Phase 2 and the construction of a second terminal underway. Northern Utah will also welcome two new ski resorts in the near future, including the Mayflower Mountain Resort in Wasatch County and the Wasatch Peaks Ranch ski and snowboard hill in Morgan County. In southern Utah, development at Zion National Park's east entrance continues with the recent deployment of an electric shuttle and the construction of a new visitor center and hiking/biking trails.

Finally, pandemic-influenced virtual working opportunities have allowed for greater "digital wandering" and amenity migration, resulting in the continued rise of "Zoom towns." In Utah, as well as in the rest of the U.S., however, the travel and tourism industry has been faced with seasonal employee housing constraints and leisure and hospitality sector labor shortages.

2022 OUTLOOK

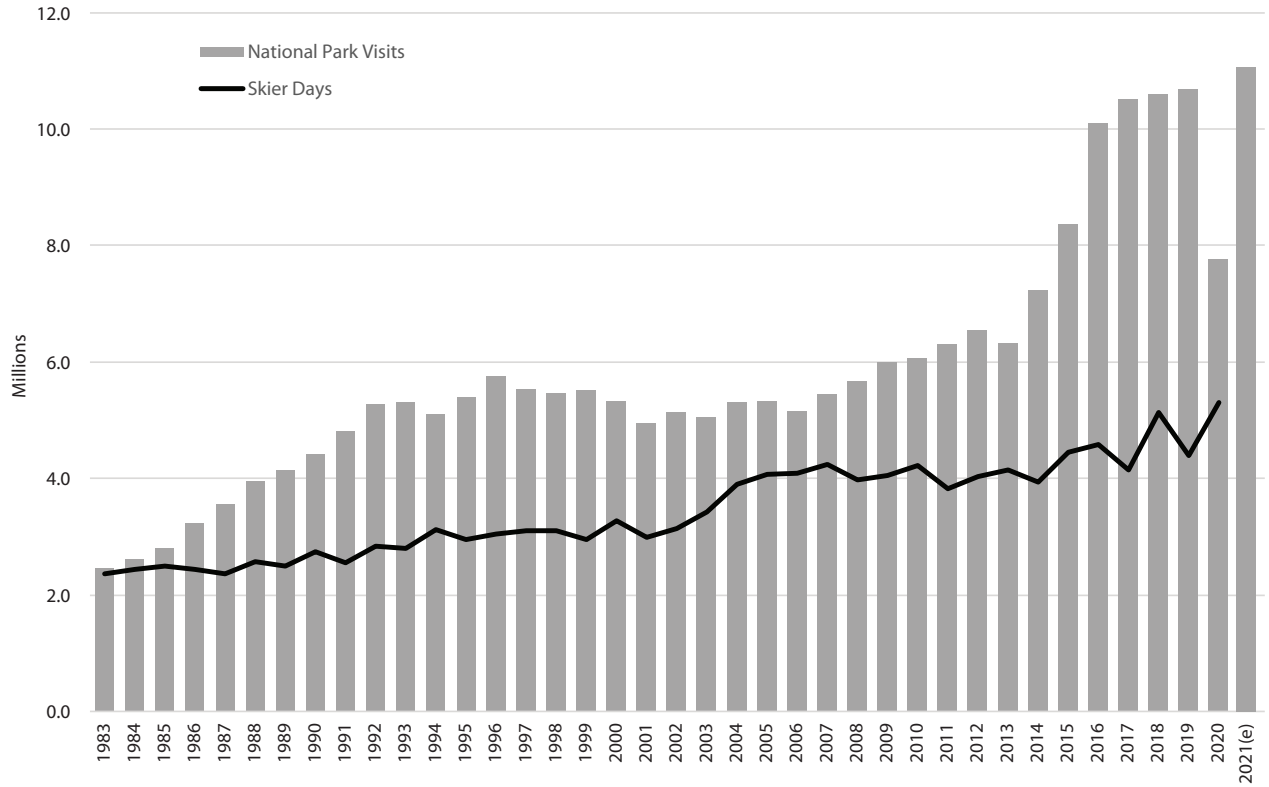
With international travel restrictions lifted in November 2021, experts anticipate international travel to rebound in 2022. Travel experts predict a 10.6% year-over increase in U.S. domestic person-trips and a 144.4% increase in international arrivals. In 2022, year-over business travel is expected to rebound more quickly than leisure travel, up 48.6% and 5.3%, respectively. Year-over air travel is anticipated to increase 26.4% compared to auto travel (up 9.5%). However, it is important to note that 2022 travel forecasts were made prior to the recent surge in omicron variant cases, which has led to several thousand U.S. flight cancellations in December 2021—a reminder that the travel industry is still vulnerable to the effects of coronavirus variants.

Figure 24.1: Accommodations Taxable Sales, 2011–2020



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

Figure 24.2: Utah National Park and Skier Visits, 1983–2021(e)



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

Table 24.1: Historical Utah Tourism Data

Year	Accommodations Taxable Sales (millions*)	National Park Visits	State Park Visits	Salt Lake Int'l. Airport Passengers	Skier Days	Travel-Related Employment	Visitor Spending (millions*)	International Visitor Spending (millions*)	Travel-Related Tax Revenue (millions*)
1983	$141	2,465,294	5,214,498	7,059,964	2,369,901	na	na	na	na
1984	$161	2,616,301	4,400,103	7,514,113	2,436,544	na	na	na	na
1985	$165	2,804,693	4,846,637	8,984,780	2,491,191	na	na	na	na
1986	$176	3,224,694	5,387,791	9,990,986	2,440,668	na	na	na	na
1987	$197	3,566,069	5,489,539	10,163,883	2,368,985	na	na	na	na
1988	$221	3,941,791	5,072,123	10,408,233	2,572,154	na	na	na	na
1989	$241	4,135,399	4,917,615	11,898,847	2,500,134	na	na	na	na
1990	$261	4,425,086	5,033,776	11,982,276	2,751,551	na	na	na	na
1991	$295	4,829,317	5,425,129	12,477,926	2,560,805	na	na	na	na
1992	$313	5,280,166	5,908,000	13,870,609	2,839,650	na	na	na	na
1993	$352	5,319,760	6,950,063	15,894,404	2,808,148	na	na	na	na
1994	$378	5,111,428	6,953,400	17,564,149	3,113,072	na	na	na	na
1995	$429	5,381,717	7,070,702	18,460,000	2,954,690	na	na	na	na
1996	$477	5,749,156	7,478,764	21,088,482	3,042,767	na	na	na	na
1997	$519	5,537,260	7,184,639	21,068,314	3,101,735	na	na	na	na
1998	$677	5,466,090	6,943,780	20,297,371	3,095,347	na	na	na	na
1999	$692	5,527,478	6,768,016	19,944,556	2,959,778	na	na	na	na
2000	$743	5,332,266	6,555,299	19,900,770	3,278,291	na	na	na	na
2001	$763	4,946,487	6,075,456	18,367,961	2,984,574	na	na	na	na
2002	$840	5,147,950	5,755,782	18,662,030	3,141,212	na	na	na	na
2003	$766	5,042,756	4,570,393	18,466,756	3,429,141	na	na	na	na
2004	$820	5,318,157	4,413,702	18,352,495	3,895,578	na	$5,648	na	$758
2005	$900	5,329,931	4,377,041	22,237,936	4,062,188	na	$5,779	na	$772
2006	$921	5,165,498	4,494,990	21,557,646	4,082,094	na	$5,908	na	$785
2007	$1,006	5,445,591	4,925,277	22,044,533	4,249,190	na	$6,769	$628	$905
2008	$1,049	5,670,851	4,564,770	20,790,400	3,972,984	na	$6,925	$697	$908
2009	$909	6,002,104	4,820,930	20,432,218	4,048,153	na	$5,689	$565	$771
2010	$1,015	6,072,900	4,842,891	21,016,686	4,223,064	na	$6,317	$667	$867
2011	$1,161	6,304,838	4,803,876	20,389,474	3,826,130	na	$6,955	$731	$942
2012	$1,248	6,555,833	5,093,740	20,096,549	4,031,621	109,300	$7,318	$774	$989
2013	$1,323	6,328,040	4,063,382	20,186,474	4,148,573	110,900	$7,507	$838	$1,058
2014	$1,406	7,239,149	3,740,896	21,141,610	3,946,762	115,200	$7,805	$789	$1,097
2015	$1,571	8,369,533	4,482,866	22,141,026	4,457,575	119,700	$8,259	$770	$1,150
2016	$1,732	10,087,077	5,175,615	23,155,527	4,584,658	125,900	$8,535	$805	$1,113
2017	$1,932	10,507,960	5,690,677	24,199,351	4,145,321	129,400	$9,148	$830	$1,202
2018	$2,038	10,600,000	6,711,932	25,554,244	5,125,441	136,600	$9,745	$823	$1,277
2019	$2,130	10,682,894	7,423,513	26,808,104	4,390,831	141,500	$10,064	$812	$1,340
2020	$1,627	7,768,944	8,705,377	12,559,026	5,301,766	119,600	$7,065	$159	$1,164
Percent Change, 2019-2020	-23.6%	-27.3%	17.3%	-53.2%	20.7%	-15.5%	-29.8%	-80.4%	-13.1%
Average Annual Rate of Change, 1983-2020	6.8%	3.2%	1.4%	1.6%	2.2%	1.1%	1.4%	-9.3%	2.7%

*Dollar amounts reported in nominal dollars

Notes: Utah State Parks employed a new methodology in 2013 and began reporting vistiation by 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), U.S. Travel Association (2009-2019); and Tourism Economics (2020); includes intnl. 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.

Long-Term Planning Projections

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OVERVIEW

The Kem C. Gardner Policy Institute prepares long-term demographic and economic planning projections every four years. This work provides state and local governments, private businesses, and nonprofit entities with a framework for understanding the overarching trends that influence Utah's future based on today's known and anticipated events. When considering these projections, it is essential to note that policy decisions, investments, and unanticipated events (such as natural disasters or global pandemics) can result in different future outcomes.

The 2021 long-term projections build on the 2017 baseline series while incorporating modeling innovations, revised assumptions, and data updates. These projections utilize 2020 census data, population estimates through 2021, and employment counts. Additional updates include more rapid declines in fertility, increased life expectancy, and explicit accounting for forthcoming economic events. Models and analysis implement a regional framework, as identified in the 2020 Economic Regions, produced by Gardner Institute. These cumulative changes result in a slightly lower 2060 state population, less natural increase, more net migration, higher households, and similar job numbers to the 2017 baseline.

State, Region, and County Population Results

These long-term population projections indicate Utah's history of population growth and change will continue, growing from 3.3 million in 2020 to 5.5 million in 2060. Statewide, population growth pairs with household growth, projected to double, from just below 1.1 million households in 2020 to 2.2 million in 2060. An aging population will play a role in a projected decrease in household size, from 3.0 people per household in 2020 to 2.3 in 2060. Net migration will continue to play a significant role in statewide growth, driving nearly three-quarters of population growth by 2060.

The Greater Salt Lake Economic Region will lead this growth, growing from 2.8 million residents in 2020 to 4.6 million in 2060. Utah County's projected addition of nearly 674,000 residents between 2020 and 2060 results in a population of 1.3 million and driving over one-third of total regional growth. A projected 2060 population of 1.7 million keeps Salt Lake County as the largest county in the future. The Southwest Economic Region will also play a notable role in statewide growth, adding over 330,000 new residents, resulting in a population of about 590,000 in 2060. Nearly 15% of statewide growth in 2060 will come from this region.

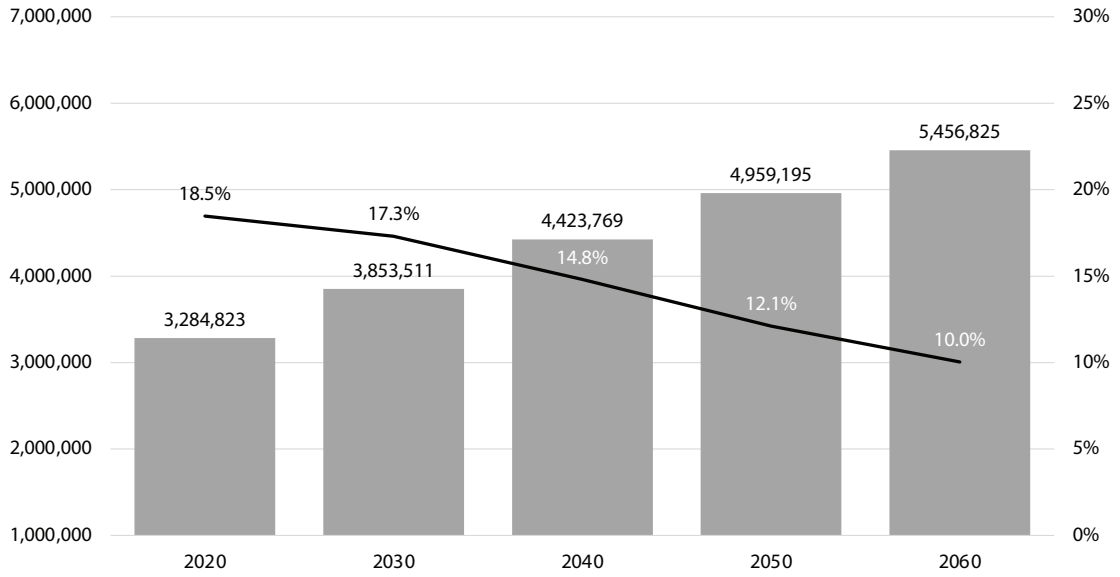
The combined impacts of decreasing fertility rates and increasing life expectancy result in an increase in the statewide median age from 32.4 in 2021 to 42.1 in 2060. The Southwest will be the oldest within the economic regions by 2060, with a median age of 49.9. The West Central Economic Region remains the youngest, with a median age of 38.6 in 2060. As Millennials and Gen Zers age into retirement and beyond, the over 65 share of the population increases from 11.5% (2020) to 22.9% (2060). The share of the population under age 18 will decrease from 28.9% in 2020 to 20.3% in 2060.

Smaller and more rural counties are projected to experience minor growth. However, Millard County is the only county projected to lose population, resulting in a 2060 population of over 11,700.

Economic Results

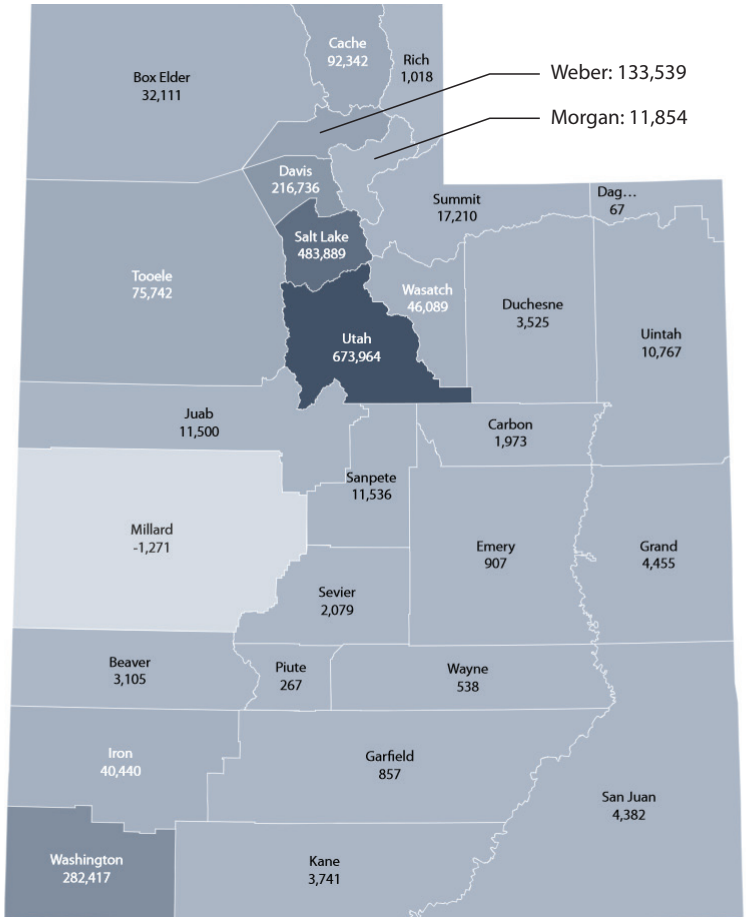
Utah's growing economy will likely add 1.3 million jobs over the next four decades to reach 3.4 million jobs by 2060. Salt Lake (545,500 jobs), Utah (346,500 jobs), Davis (114,000 jobs), and Washington (109,900 jobs) counties account for over 80% of the anticipated job growth. The projected job gains in construction (207,100 jobs), health care and social assistance (184,900 jobs), and professional, scientific, and technical services (195,100 jobs) sectors drive this change.

Figure 25.1: Utah Population and Growth Projections by Decade, 2020–2060



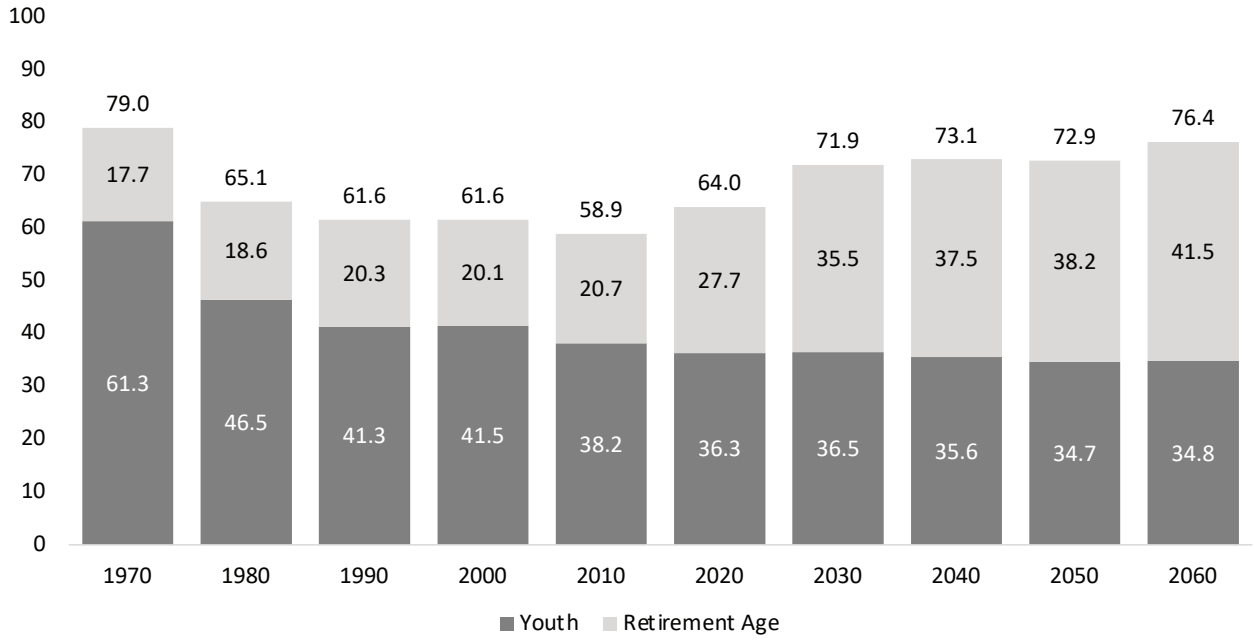
Source: Kem C. Gardner Policy Institute 2020-2060 State and County Projections

Figure 25.2: Projected Absolute Change by County, 2020–2060



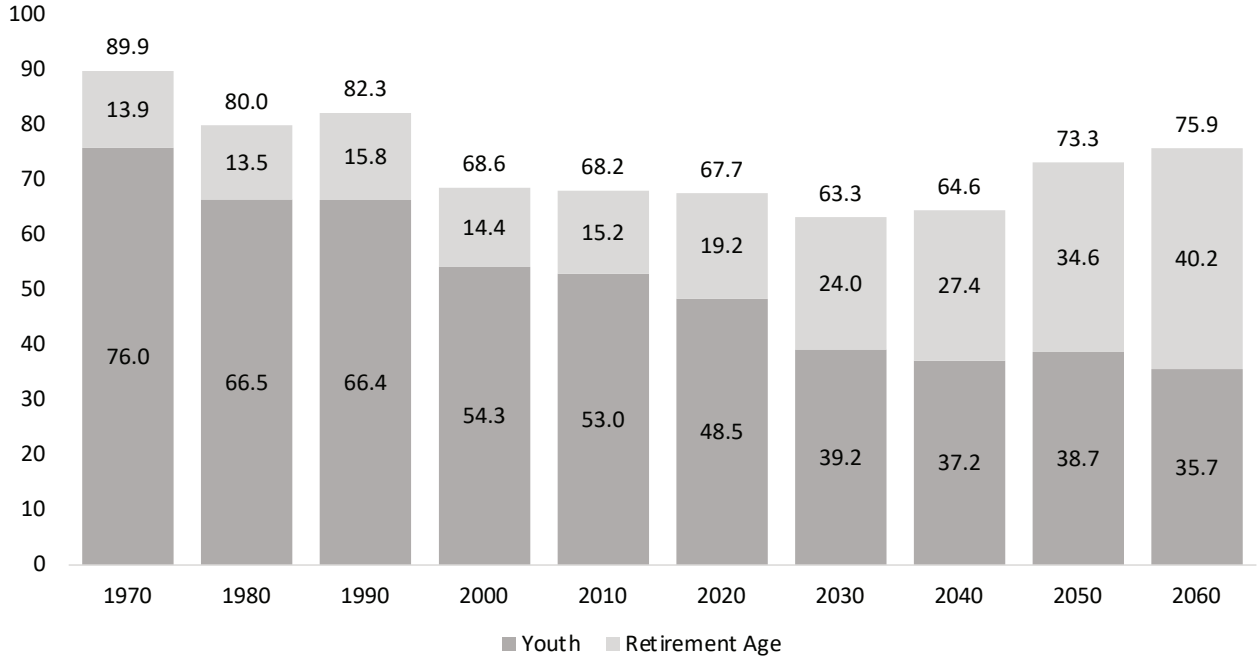
Source: Kem C. Gardner Policy Institute 2020-2060 State and County Projections

Figure 25.3: U.S. Dependency Ratios, 1970–2060



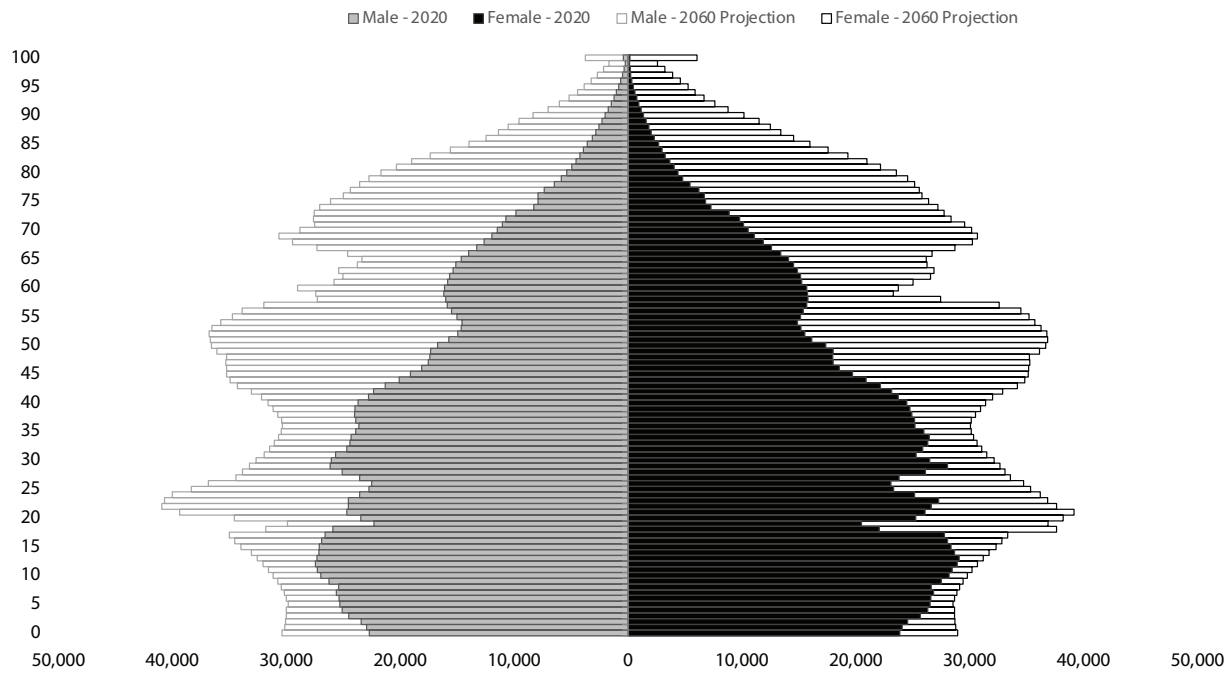
Note: Dependency Ratios are computed as the number of nonworking age persons per 100 working age (18-64 year old) persons in the population. Youth are less than 18 years old and retirement age is 65 years and older.
Source: Kem C. Gardner Policy Institute analysis of U.S. Census Bureau Decennial Census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

Figure 25.4: Utah Dependency Ratios, 1970–2060



Note: Dependency Ratios are computed as the number of nonworking age persons per 100 working age (18-64 year old) persons in the population. Youth are less than 18 years old and retirement age is 65 years and older.
Source: Kem C. Gardner Policy Institute analysis of U.S. Census Bureau Decennial Census data and Kem C. Gardner Policy Institute 2020-2060 State and County Projections

Figure 25.5: Utah Population Pyramid, 2020 and 2060



Source: Kem C. Gardner Policy Institute 2020-2060 State and County Projections

Table 25.1: Utah Population by County, 2020–2060

	2020	2030	2040	2050	2060	Absolute Change 2020-2060	Percent Change 2020-2060
Beaver	7,076	8,008	8,777	9,397	10,181	3,105	44%
Box Elder	57,886	67,637	75,494	83,130	89,997	32,111	55%
Cache	133,743	163,345	185,948	207,094	226,084	92,342	69%
Carbon	20,449	21,098	20,689	21,475	22,422	1,973	10%
Daggett	943	905	910	942	1,009	67	7%
Davis	363,419	411,564	472,344	529,711	580,155	216,736	60%
Duchesne	19,608	18,796	19,351	20,807	23,133	3,525	18%
Emery	9,824	9,862	9,674	10,066	10,731	907	9%
Garfield	5,084	5,071	5,294	5,499	5,941	857	17%
Grand	9,664	9,920	11,375	12,474	14,119	4,455	46%
Iron	57,658	77,312	85,248	91,299	98,098	40,440	70%
Juab	11,831	14,438	17,586	20,617	23,331	11,500	97%
Kane	7,692	8,834	9,769	10,511	11,433	3,741	49%
Millard	13,010	13,378	12,777	12,304	11,739	-1,271	-10%
Morgan	12,353	15,080	18,184	21,301	24,207	11,854	96%
Piute	1,442	1,577	1,625	1,663	1,708	267	19%
Rich	2,517	2,795	3,059	3,311	3,534	1,018	40%
Salt Lake	1,188,213	1,316,739	1,451,869	1,572,359	1,672,102	483,889	41%
San Juan	14,541	14,712	16,186	17,280	18,923	4,382	30%
Sanpete	28,560	31,839	34,693	37,100	40,096	11,536	40%
Sevier	21,571	22,739	23,044	23,326	23,650	2,079	10%
Summit	42,394	47,079	52,303	56,493	59,603	17,210	41%
Tooele	73,149	96,600	115,253	133,001	148,890	75,742	104%
Uintah	35,679	37,260	39,112	42,971	46,446	10,767	30%
Utah	664,258	853,711	1,021,077	1,185,679	1,338,222	673,964	101%
Wasatch	34,933	44,904	57,112	69,483	81,022	46,089	132%
Washington	182,111	265,865	337,326	401,757	464,528	282,417	155%
Wayne	2,490	2,556	2,712	2,850	3,028	538	22%
Weber	262,727	295,538	331,771	366,031	396,265	133,539	51%
State Total	3,284,823	3,879,161	4,440,560	4,969,929	5,450,598	2,165,775	66%

Source: Kem C. Gardner Policy Institute 2020-2060 State and County Projections

Table 25.2: Utah Population Projections by Components of Change, 2020–2060

Year	July 1st Population	Percent Change	Increase	Net Migration	Natural Increase	Births	Deaths
2020	3,284,823	1.8%	53,715	26,142	27,573	46,510	18,937
2021	3,343,552	1.8%	58,729	34,858	23,871	45,639	21,768
2022	3,403,190	1.8%	59,638	34,135	25,503	45,359	19,855
2023	3,464,887	1.8%	61,696	36,689	25,007	45,264	20,257
2024	3,526,992	1.8%	62,105	37,197	24,908	45,702	20,793
2025	3,588,325	1.7%	61,333	36,324	25,009	46,333	21,324
2026	3,647,847	1.6%	59,522	34,227	25,295	47,157	21,862
2027	3,707,365	1.6%	59,519	33,797	25,721	48,160	22,438
2028	3,765,808	1.6%	58,443	32,172	26,271	49,300	23,029
2029	3,823,047	1.5%	57,239	30,369	26,870	50,489	23,618
2030	3,879,161	1.4%	56,114	28,596	27,519	51,782	24,263
2031	3,934,602	1.4%	55,440	27,295	28,145	53,062	24,917
2032	3,989,928	1.4%	55,326	26,624	28,702	54,291	25,588
2033	4,045,806	1.4%	55,878	26,699	29,179	55,484	26,304
2034	4,101,768	1.4%	55,962	26,437	29,525	56,581	27,056
2035	4,158,181	1.4%	56,412	26,631	29,781	57,583	27,801
2036	4,214,821	1.3%	56,640	26,872	29,769	58,409	28,641
2037	4,271,482	1.3%	56,661	27,034	29,626	59,123	29,496
2038	4,327,969	1.3%	56,487	27,297	29,191	59,691	30,500
2039	4,384,194	1.3%	56,225	27,522	28,703	60,060	31,357
2040	4,440,560	1.3%	56,367	28,139	28,227	60,433	32,206
2041	4,496,514	1.2%	55,954	28,390	27,563	60,605	33,042
2042	4,551,744	1.2%	55,230	28,641	26,589	60,600	34,012
2043	4,606,307	1.2%	54,563	28,910	25,653	60,452	34,799
2044	4,659,824	1.1%	53,517	29,052	24,465	60,197	35,732
2045	4,712,762	1.1%	52,938	29,705	23,233	59,883	36,649
2046	4,765,572	1.1%	52,809	30,478	22,331	59,521	37,190
2047	4,817,728	1.1%	52,157	31,088	21,068	59,137	38,068
2048	4,869,323	1.1%	51,594	31,590	20,005	58,758	38,753
2049	4,920,070	1.0%	50,748	31,941	18,807	58,393	39,585
2050	4,969,929	1.0%	49,859	32,158	17,701	58,105	40,404
2051	5,019,857	1.0%	49,928	33,061	16,867	57,877	41,011
2052	5,069,569	1.0%	49,712	33,790	15,922	57,700	41,778
2053	5,119,019	1.0%	49,450	34,179	15,272	57,593	42,321
2054	5,167,718	0.9%	48,699	34,006	14,693	57,566	42,873
2055	5,215,630	0.9%	47,912	33,919	13,992	57,606	43,613
2056	5,263,304	0.9%	47,674	34,279	13,395	57,788	44,393
2057	5,310,621	0.9%	47,317	34,451	12,866	58,020	45,154
2058	5,357,795	0.9%	47,174	34,577	12,597	58,263	45,667
2059	5,404,637	0.9%	46,843	34,694	12,149	58,534	46,385
2060	5,450,598	0.8%	45,961	34,225	11,736	58,842	47,106

Note: Data in this table may differ from other tables due to different sources of data or rounding.
Source: Kem C. Gardner Policy Institute 2020-2060 State and County Projections

Table 25.3: Utah Demographic Projections by Selected Age Groups, 2020–2060

	Total Population		School Age Population (5-17)		Working Age Population (18-64)		Retirement Age Population (65+)	
Year	Total	Median Age	Total	Share of Total Population	Total	Share of Total Population	Total	Share of Total Population
2020	3,284,823	32.1	706,174	21.5%	1,959,287	59.6%	376,220	11.5%
2030	3,879,161	35.2	681,572	17.6%	2,375,965	61.2%	571,092	14.7%
2040	4,440,560	36.6	702,706	15.8%	2,698,103	60.8%	739,617	16.7%
2050	4,969,929	39.6	814,074	16.4%	2,867,657	57.7%	991,380	19.9%
2060	5,450,598	42.1	811,572	14.9%	3,099,467	56.9%	1,245,287	22.8%

Source: Kem C. Gardner Policy Institute 2020-2060 State and County Projections

Table 25.4: Total Utah Employment by County, 2020–2060

County	2020	2030	2040	2050	2060	Absolute Change 2020-2060	Percent Change 2020-2060
Beaver	4,030	4,388	4,676	5,069	5,406	1,376	34%
Box Elder	29,826	35,753	38,514	41,233	42,807	12,981	44%
Cache	82,979	97,811	109,684	120,531	126,714	43,735	53%
Carbon	11,174	10,945	10,937	11,728	12,600	1,426	13%
Daggett	525	647	680	704	736	212	40%
Davis	196,858	236,180	260,029	288,350	310,889	114,031	58%
Duchesne	11,669	12,180	12,325	12,705	12,924	1,255	11%
Emery	4,980	5,038	4,661	4,478	4,595	-385	-8%
Garfield	3,352	3,869	3,849	3,907	3,855	503	15%
Grand	7,534	9,348	9,657	10,176	10,634	3,100	41%
Iron	30,263	36,443	41,287	45,726	49,603	19,339	64%
Juab	5,553	6,742	7,563	8,333	8,956	3,402	61%
Kane	5,130	6,078	6,385	6,934	7,346	2,215	43%
Millard	7,428	7,849	8,082	8,290	8,349	922	12%
Morgan	5,262	6,314	6,975	7,621	7,881	2,619	50%
Piute	639	615	591	576	568	-71	-11%
Rich	1,629	1,833	1,899	2,017	2,079	449	28%
Salt Lake	945,896	1,140,373	1,264,859	1,398,926	1,491,496	545,599	58%
San Juan	6,508	7,223	7,647	8,028	8,476	1,968	30%
Sanpete	13,369	15,259	16,396	17,021	17,392	4,022	30%
Sevier	12,638	12,958	13,386	14,475	15,413	2,775	22%
Summit	38,852	52,424	56,784	59,582	60,046	21,194	55%
Tooele	23,890	30,286	34,572	38,715	41,676	17,786	74%
Uintah	18,213	19,679	20,883	22,687	24,083	5,869	32%
Utah	374,457	479,028	549,051	640,493	721,028	346,572	93%
Wasatch	17,609	23,185	26,219	28,752	29,396	11,787	67%
Washington	104,797	143,157	172,488	196,373	214,794	109,997	105%
Wayne	1,917	2,240	2,347	2,525	2,688	771	40%
Weber	144,624	166,113	178,639	193,749	205,921	61,297	42%
State of Utah	2,111,604	2,573,957	2,871,064	3,199,703	3,448,350	1,336,746	63%

Sources: Kem C. Gardner Policy Institute 2020-2060 State and County Projections; U.S. Bureau of Economic Analysis Local Area Employment data

Table 25.5: Total Utah Employment by Industry, 2020–2060

Wage and Salary Employment	2020	2030	2040	2050	2060	Absolute Change 2020-2060	Percent Change 2020-2060
Accommodation And Food Services	121,825	169,204	171,317	194,121	204,534	82,709	68%
Administrative, Support, Waste Management, And Remediation Services	114,123	154,920	182,059	210,153	225,154	111,031	97%
Arts, Entertainment, And Recreation	40,652	64,858	71,616	75,306	82,237	41,585	102%
Construction	147,864	185,185	234,978	301,865	354,974	207,110	140%
Educational Services; Private	68,925	86,938	92,440	103,634	115,427	46,502	67%
Farm	22,347	19,836	19,822	20,265	20,624	-1,722	-8%
Federal Civilian	39,427	40,798	41,834	42,307	43,132	3,705	9%
Federal Military	17,172	16,868	17,256	17,721	18,216	1,043	6%
Finance And Insurance	146,845	154,894	166,835	185,225	199,263	52,418	36%
Forestry, Fishing, And Hunting	5,652	5,525	6,429	7,316	8,202	2,549	45%
Health Care And Social Assistance	179,987	231,629	279,586	322,865	364,967	184,980	103%
Information	44,249	54,589	65,171	72,025	80,027	35,777	81%
Local Government	125,150	144,999	161,628	178,511	195,045	69,895	56%
Management Of Companies And Enterprises	32,997	36,117	34,876	33,990	32,518	-478	-1%
Manufacturing	145,994	170,944	182,142	184,538	185,405	39,410	27%
Mining	11,656	12,041	13,191	13,213	13,267	1,611	14%
Other Services (Except Public Administration)	103,338	144,200	155,084	164,949	172,144	68,806	67%
Professional, Scientific, And Technical Services	173,093	249,384	302,470	352,637	368,240	195,147	113%
Real Estate And Rental And Leasing	123,434	142,991	135,148	131,235	128,129	4,695	4%
Retail Trade	214,715	211,708	256,628	300,163	336,414	121,700	57%
State Government	79,645	92,531	105,528	116,473	127,359	47,714	60%
Transportation And Warehousing	87,249	108,080	100,817	98,824	101,266	14,017	16%
Utilities	4,488	3,047	2,336	2,130	2,157	-2,331	-52%
Wholesale Trade	60,775	72,673	71,875	70,237	69,649	8,873	15%

Sources: Kem C. Gardner Policy Institute 2020-2060 State and County Projections; U.S. Bureau of Economic Analysis Local Area Employment data; Utah Department of Workforce Services Quarterly Census of Employment and Wages data

Property Tax

26

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2021 OVERVIEW

The property tax is a major component of Utah's state and local tax portfolio. Property taxes fund schools, counties, cities and towns, and limited-purpose local districts. Along with a total revenue yield roughly similar to income and sales taxes over time, the property tax brings different features and challenges compared to these two other major revenue sources. With close ties to local property-value-enhancing services, a broad base coupled with a low rate, revenue stability, taxation of certain assets, and less economic drag than other major taxes, Utah's property tax offers many advantages over other major revenue sources.

Property taxes pay for about $4.2 billion in Utah's local government services, including those provided by school districts, counties, cities, towns, and other districts. Nearly 60% of property taxes fund schools. While the State of Utah itself chooses to no longer collect a property tax, school property taxes heavily influence state school budget allocations.

K-12 School Funding

The Utah Constitution identifies education as a core function of government to be funded with taxes, charging the Legislature with establishing and maintaining a statewide education system that is (a) open to all children in the state and (b) free, except that secondary school fees may be charged.

The Legislature carries out this constitutional mandate primarily through the Minimum School Program. The Legislature also funds other programs and authorizes school districts to impose local property taxes funding public education, subject to certain rate caps and revenue use limitations.

Total FY 2022 K-12 school funding from all sources totals an estimated $8.5 billion, including about $600 million in COVID-related one-time funding. State income taxes and local property taxes are by far the largest public education funding sources. Other significant revenue sources include federal funds, various fees, and miscellaneous revenue sources such as interest income.

A foundational public education funding challenge is that local property tax values per student vary dramatically throughout the state. Disparities occur for various reasons, including differences in overall property values and the mix of fully taxed business property and partially exempt residential property in different areas. The Minimum School Program partially offsets these property tax disparities through a partially equalized funding system.

Utah's Minimum School Program connects school property taxes and state funds (mainly income taxes). Under this partially equalized funding program, each school district imposes certain property taxes, which unlocks district eligibility for state funding. Three major programs comprise the Minimum School Program (nearly $5.4 billion in FY 2022):

- Basic School Program ($3.5 billion)
- Related-to-Basic Program ($1.0 billion)
- Voted and Board Levy Guarantee Program ($0.9 billion)

The Basic School Program (the largest component of the Minimum School Program) is a fully equalized statewide program (a) funded through statewide property tax ("basic levy") and income tax systems, and (b) that allocates funds to school districts and charter schools based on an equalized weighted pupil unit (WPU) methodology. In other words, the Basic School Program fully equalizes both the revenue and spending sides of the budget.

With the uniform statewide property tax rate (which makes up about 23% of school property taxes and 13% of all 2020 property taxes), property with the same taxable value is taxed uniformly wherever located in the state.

The Related-to-Basic Program consists of state-funded categorial programs focused on particular student populations or other directed purposes. Examples include charter school local replacement funding, pupil transportation, students at risk of academic failure, educator salary add-ons, arts education, and teacher supplies, among many others.

Unlike the fully equalized Basic School Program, other discretionary local property taxes (over 75% of school property taxes) remain only partially equalized, resulting in sizable school district funding disparities. Under the Board Levy Guarantee Program, the state incentivizes local property tax effort for discretionary local taxes by allocating state funds (about $250 million) to ensure local property taxes when combined with state funds generate certain per-student revenue levels. Not all districts impose the same tax rates, thus the overall burden on taxpayers varies by district.

Property Tax Rates

Enacted in 1985, Utah's "Truth in Taxation" system requires taxing entities to follow specified public notice and hearing requirements to increase the dollar amount of property tax revenue they receive, exclusive of "new growth" such as a new home or office building. In other words, Utah's property tax system is revenue-driven rather than rate-driven.

Property value increases for existing properties do not automatically increase property tax revenues because the tax rate automatically drops to offset that valuation increase. The tax rate that generates the same dollar amount of budgeted revenue in the prior year, exclusive of "new growth," is known as the "certified tax rate." Subject to statutory caps, a taxing entity generally can only charge a higher rate than the certified tax rate by following the specified procedures for advertising the revenue increase and holding a public hearing that allows public comment.

Property Tax Base

Over the decades since statehood, Utah's property tax system has shifted from a "general" tax (theoretically) on nearly all privately-owned property to a narrower tax imposed primarily on real property and, to a lesser extent, business personal property, along with certain household personal property (such as cars, boats, and motor homes) taxed through a fee in lieu of the property tax.

In 2020, Utah assessors estimated the market value for taxable property at nearly $500 billion. This estimated market value excludes non-taxable property values, such as government and exempt non-profit property, and estimates agricultural property at its value for agricultural use (rather than fair market value). About $350 billion of this $500 billion total was taxed, with the primary residential exemption constituting the nearly $150 billion difference.

In 2020, primary residential property made up about two thirds of estimated market values and a little over half of taxable values. The Utah Constitution authorizes up to a 45% property tax exemption of residential property values. The Legislature has made the policy decision to provide the full 45% exemption to all primary residential property values, including both owner-occupied and renter-occupied property.

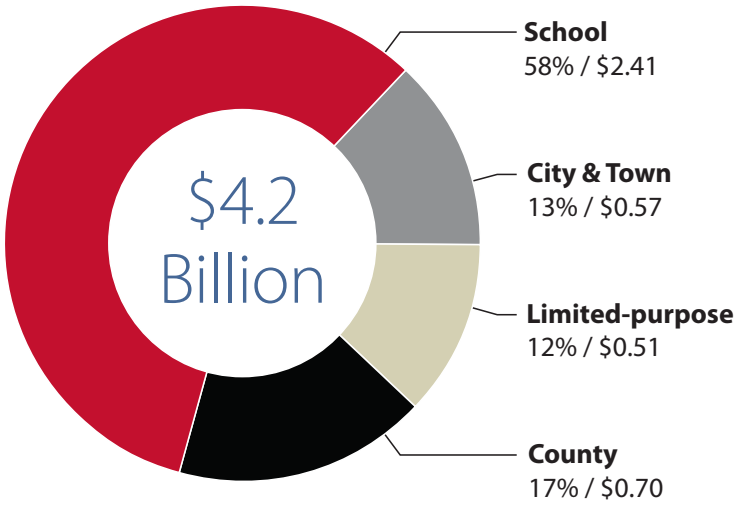
Utah's uncapped residential exemption is more generous than other states, particularly for high value homes. Most states with a residential exemption cap the exemption or tax reduction at a specified amount (similar to Utah's homestead exemption in place until 1982). Utah is one of only three states to offer a percentage-based homestead exemption for all primary residencies and the only one that does so with no cap or differential rates (based on home value). Most states that offer property tax relief for homeowners do so through a fixed value homestead exemption. These exemptions range from $3,000 to $75,000. Utah's median priced home ($380,000) received a $171,000 exemption in 2020— significantly more than any other state.

2022 OUTLOOK

The property tax will likely continue to play a significant role funding schools and local government services. In 2022, the overall population is expected to grow 1.8% with a net increase of nearly 60,000 people. School enrollment is forecasted to increase by 0.5% (3,680 students), increasing service demands.

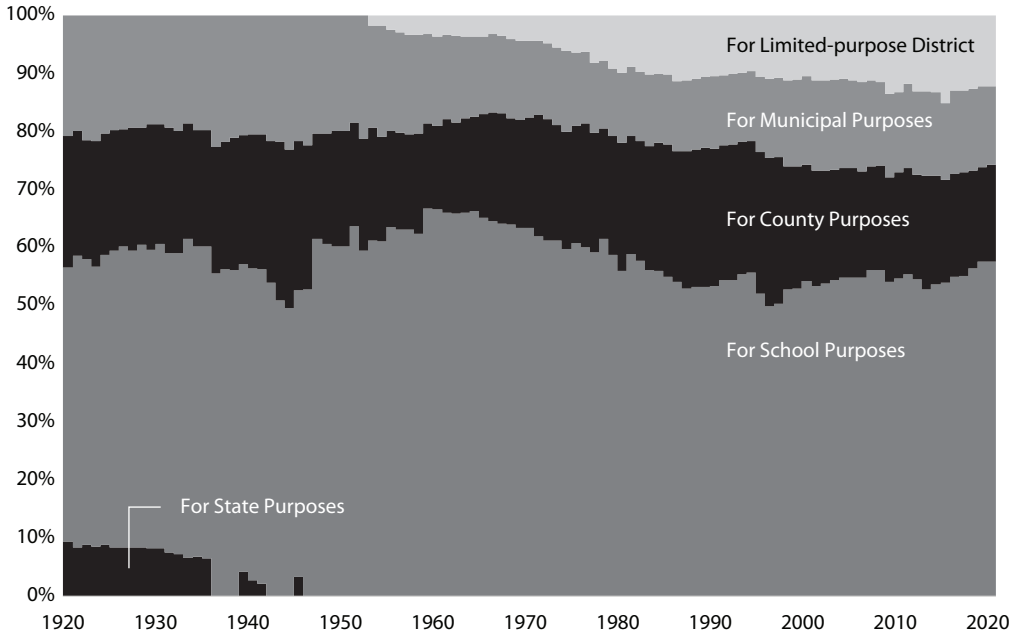
Assessed property values, particularly for homes, should increase in the midst of hot real estate markets. However, because certified tax rates will automatically float down, taxing entities that intend to collect more property tax revenue will generally be required to go through the truth in taxation public notice and hearing process.

Figure 26.1: Utah Property Taxes Charged by Entity Type, 2020 ($ in billions)



Source: Utah State Tax Commission

Figure 26.2: Share of Utah Property Taxes Charged by Purpose, 1920–2020

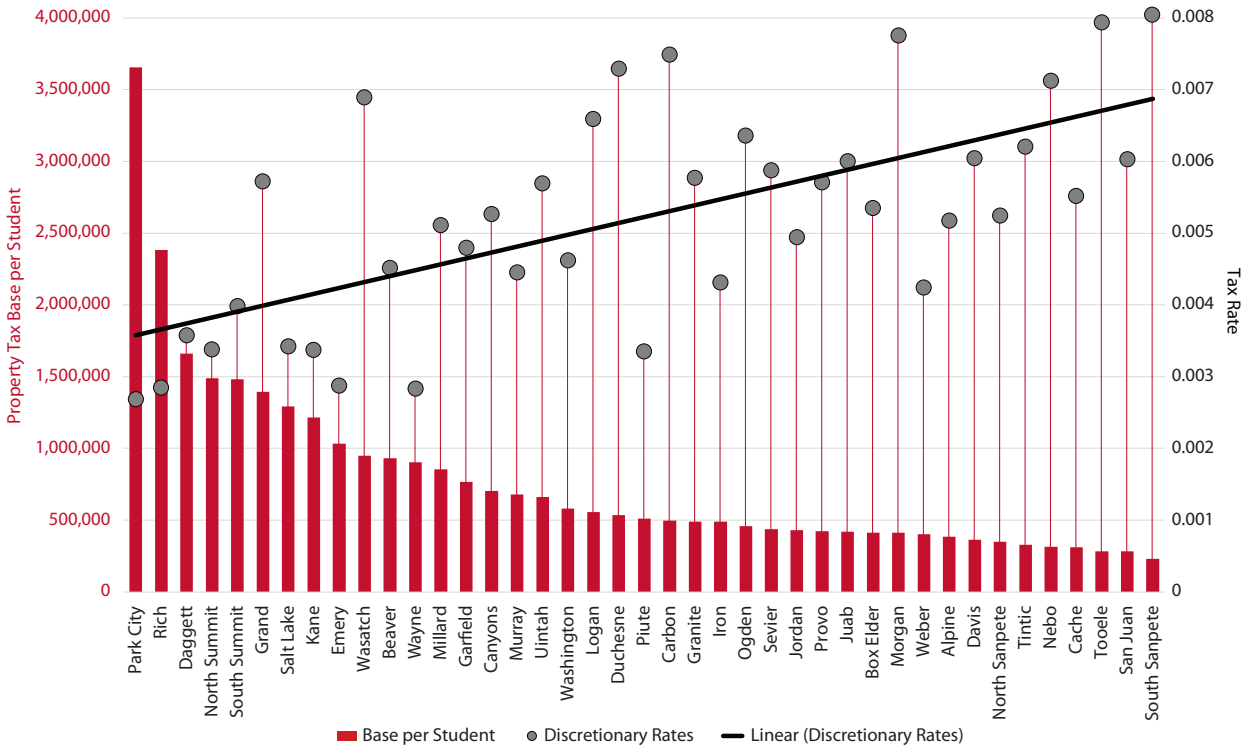


Notes: "For school purposes" includes state-imposed property taxes levied for school purposes until 1973.
"For county purposes" includes property taxes levied for local road purposes. Prior to 1953, special limited-purpose district taxes included with municipal taxes.
Source: Utah Foundation and Utah State Tax Commission

Figure 26.3: Year-Over-Year Change in Tax Revenue per Capita, 1980–2021

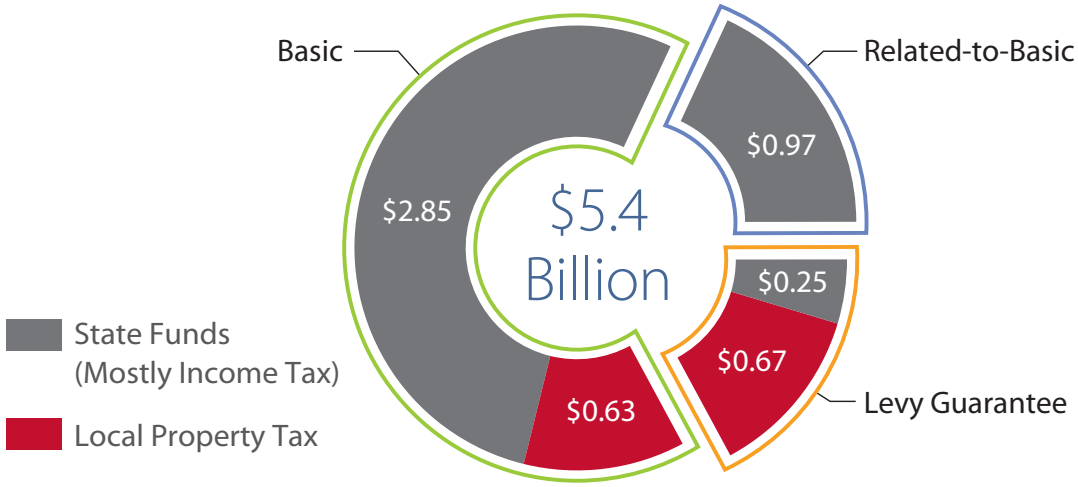
Source: Utah State Tax Commission and Kem C. Gardner Policy Institute

Figure 26.4: Property Tax Base per Student and Tax Rates, FY 2020



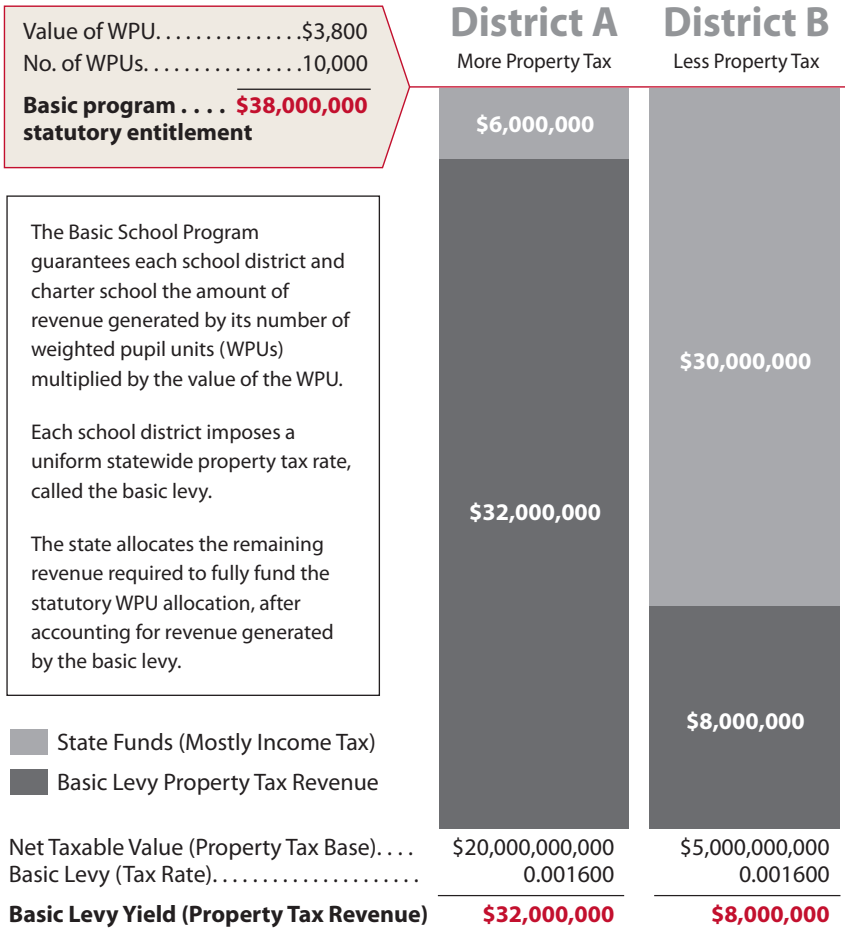
Note: Discretionary rates exclude the statewide mandated rate (basic levy).
Source: Utah State Board of Education and Utah State Tax Commission

Figure 26.5: Minimum School Program Funding, FY 2022 ($ in billions)



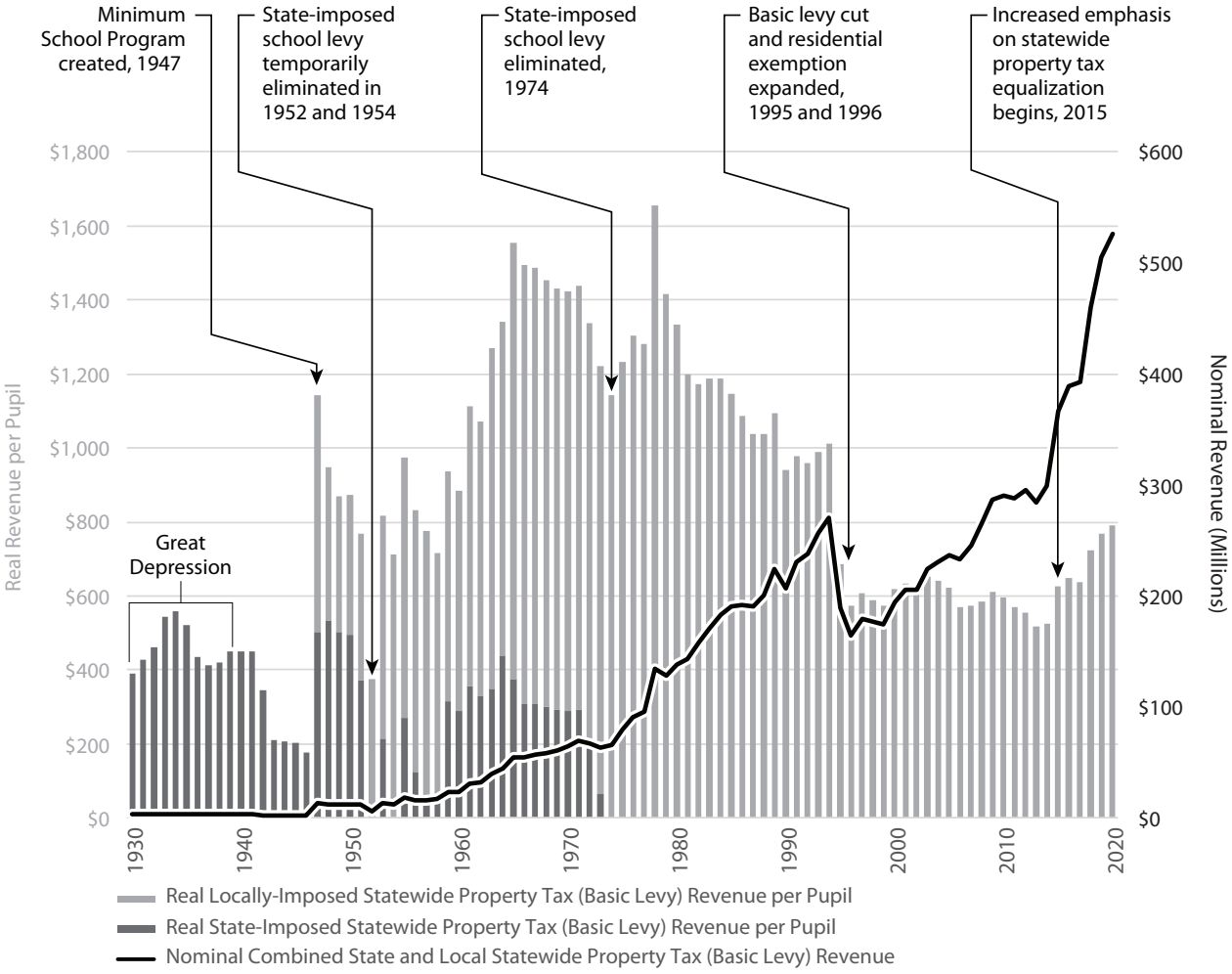
Source: Office of the Legislative Fiscal Analyst

Figure 26.6: Basic School Program for Two Hypothetical School Districts



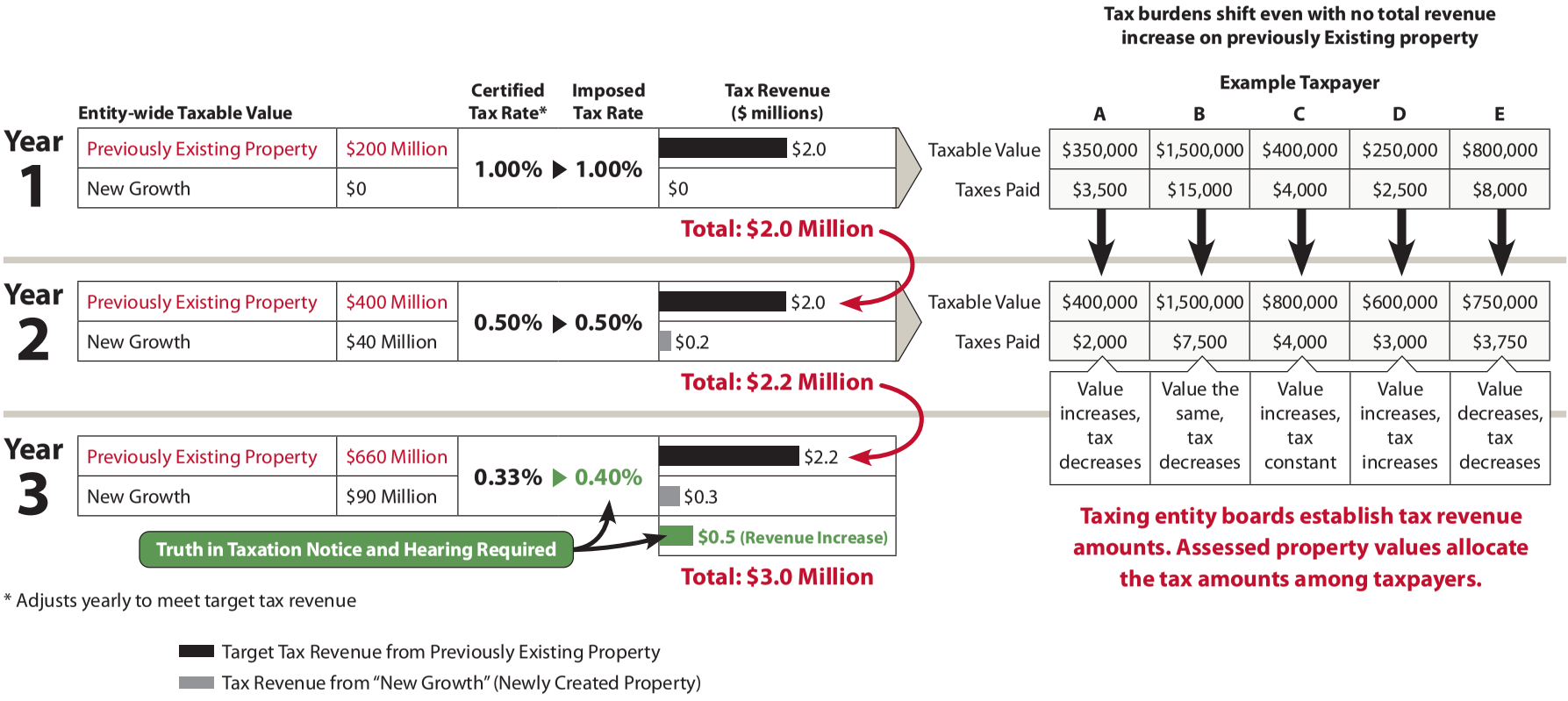
Source: Kem C. Gardner Policy Institute

Figure 26.7: Total Basic Levy Revenue (Nominal) and Real Per Pupil Statewide School Property Tax Revenue, 1940–2020



Source: Utah Superintendent's annual reports and Utah Foundation

Figure 26.8: Example of Truth in Taxation Certified Tax Rate Process



Source: Kem C. Gardner Policy Institute

Table 26.1: Homestead Property Tax Exemptions or Credits for All Primary Residences

$ Homestead Tax Credits %

AR	$350
MS	Up to $300

AZ	47.19% for School Primary Levy
IL	5%
OH	10% and 2.5% rollback
WI	12%

$ Homestead Exemptions %

AL	$40,000 (state), $20,000 (local)
CA	$7,000
FL	$25,000 (all taxes), $25,000 (excludes school taxes)
GA	$5,000
IA	$4,850
IN	$45,000
KS	$20,000 (school levy)
LA	$75,000 (excludes municipal taxes)
ME	$20,000
NM	$6,000 (excludes special assessment)
NY	$30,000 (school)
OK	$8,000
TX	$25,000 (school), $3,000 (county special taxes)
WI	$23,800 (two programs, school)

ID	50% (capped at $100,000)
IN	35% (homes valued $600,000 or less), 25% (homes valued more than $600,000)
UT	**45% (Uncapped exemption, applies to all primary residence values)**

Other	
SC	Exempt from school taxes for operating costs
MI	Exempt from local school levy
MN	40% of the first $76,000 of market value, reduced by 9% of the value over $76,000, and phases out completely at $413,800 market value

Note: This table only includes homestead property relief to all primary residences. Many states (both those in this table and those not in this table) offer homestead property relief to specific populations (e.g. based on income, age, disability, or veteran status).
Source: Lincoln Institute of Land Policy