Kem C. Gardner
POLICY INSTITUTE
THE UNIVERSITY OF UTAH
DAVID ECCLES SCHOOL OF BUSINESS

Gardner Institute
Long-Term Planning Projections

INFORMED DECISIONS™

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Outline of content

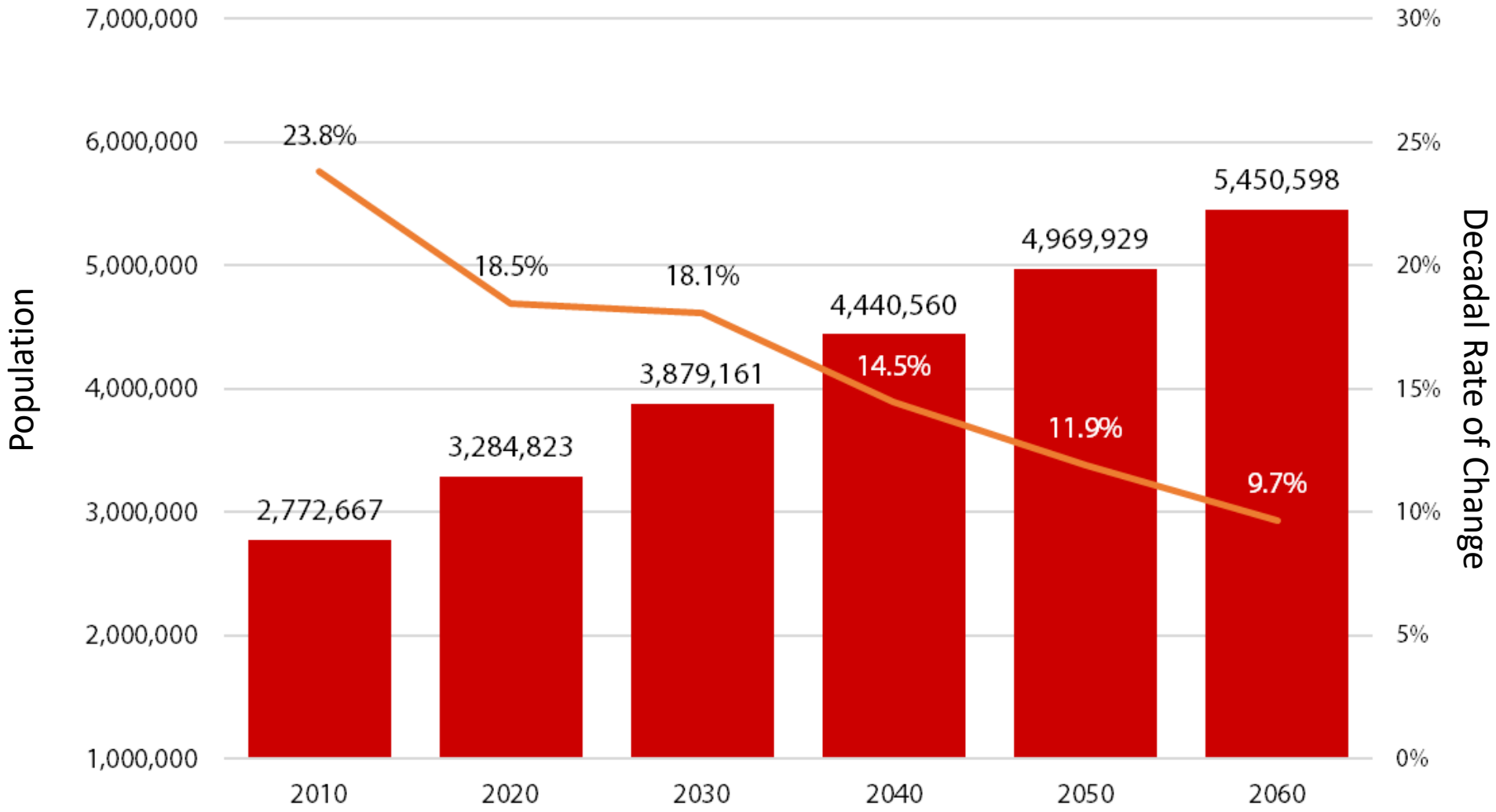
- Background on Gardner Projections
- General Highlights

Gardner Planning Projection Process

- Long-term every 4 years, short-term every 2 years
- Work with community partners
- New or updated inputs and methods

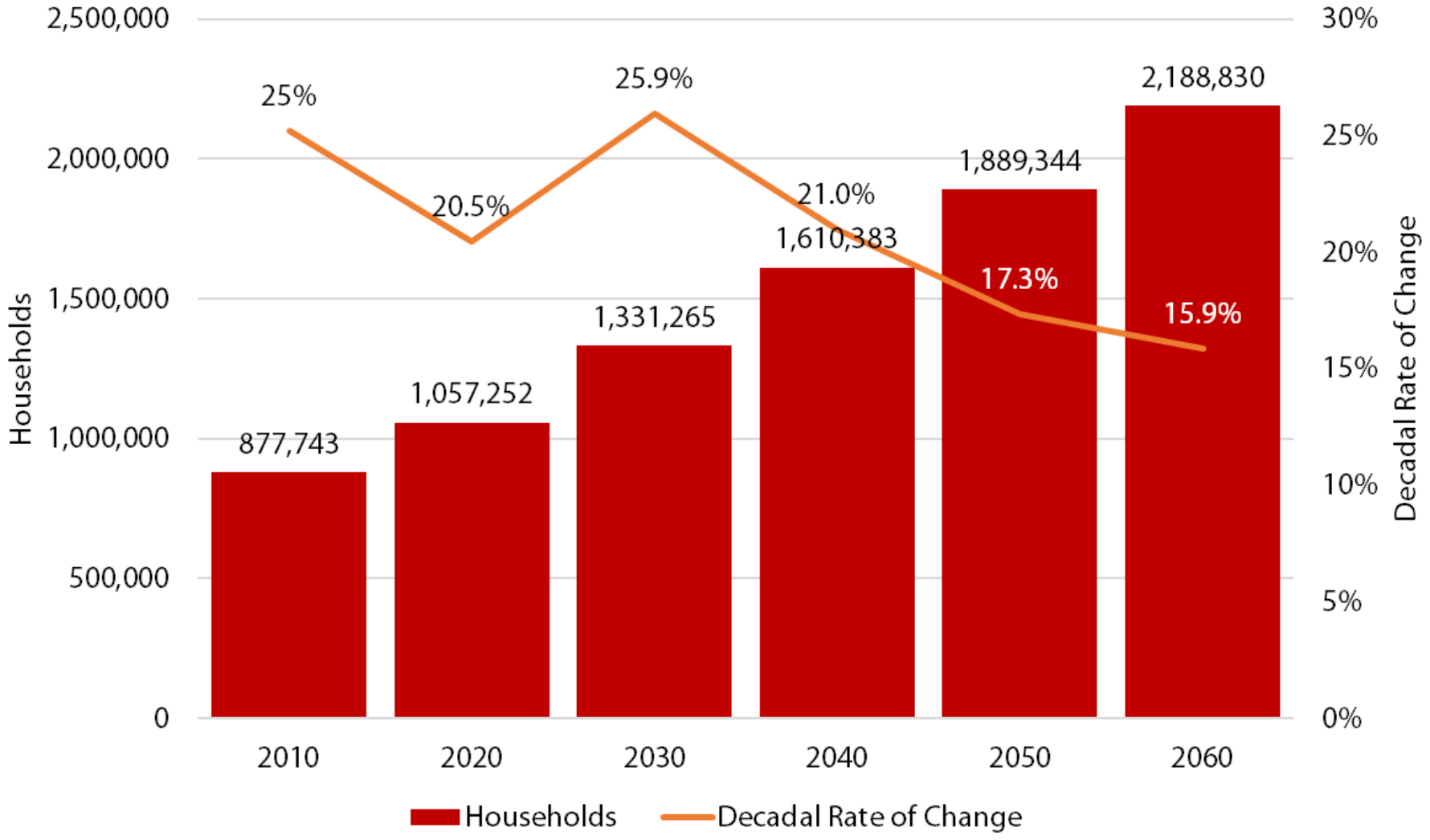
Data Highlights

Historical and Projected Population Change, 2010-2060



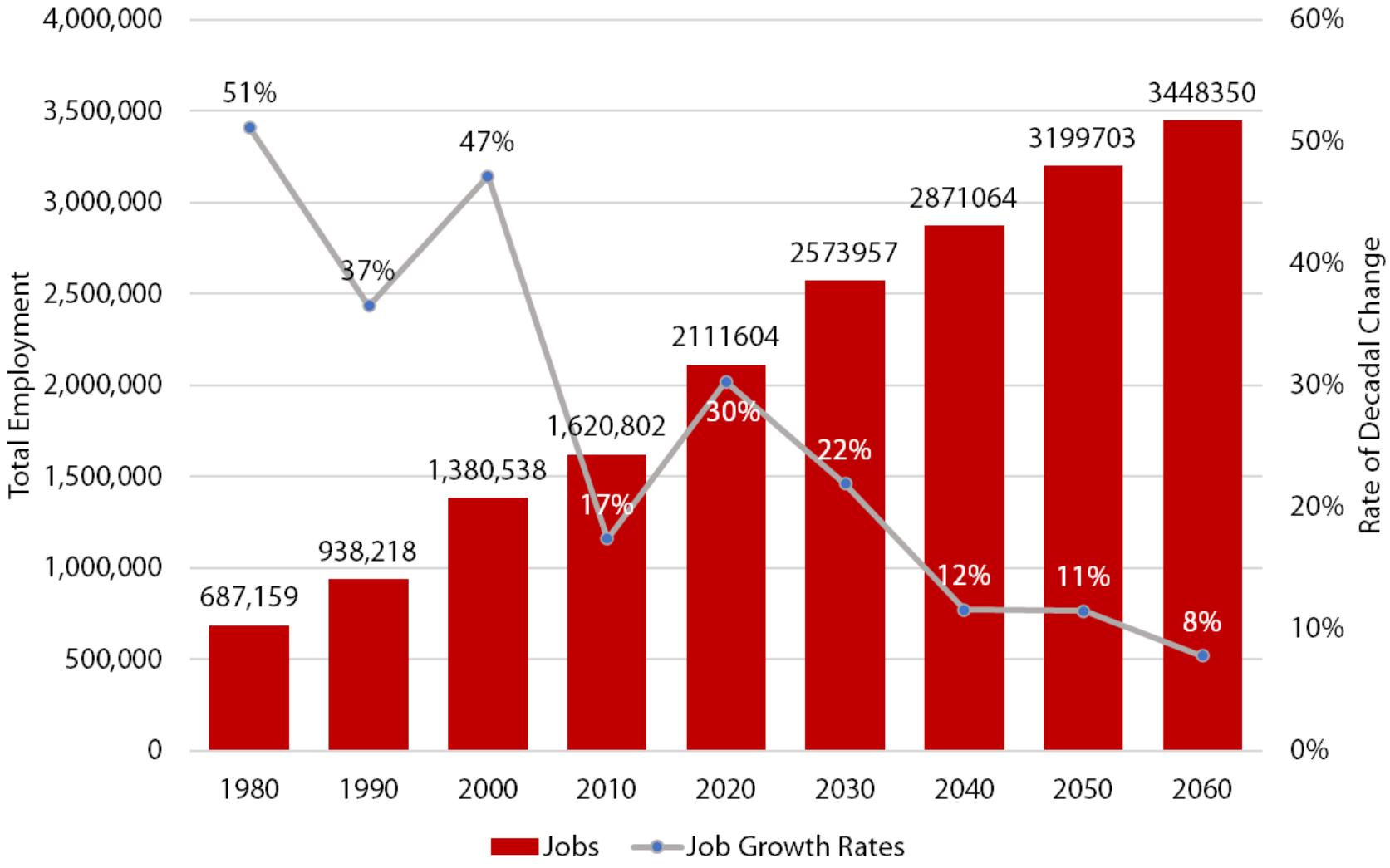
Source: Kem C. Gardner Policy Institute, 2020-2060 Projections

Historical and Projected Household Change, 2010-2060



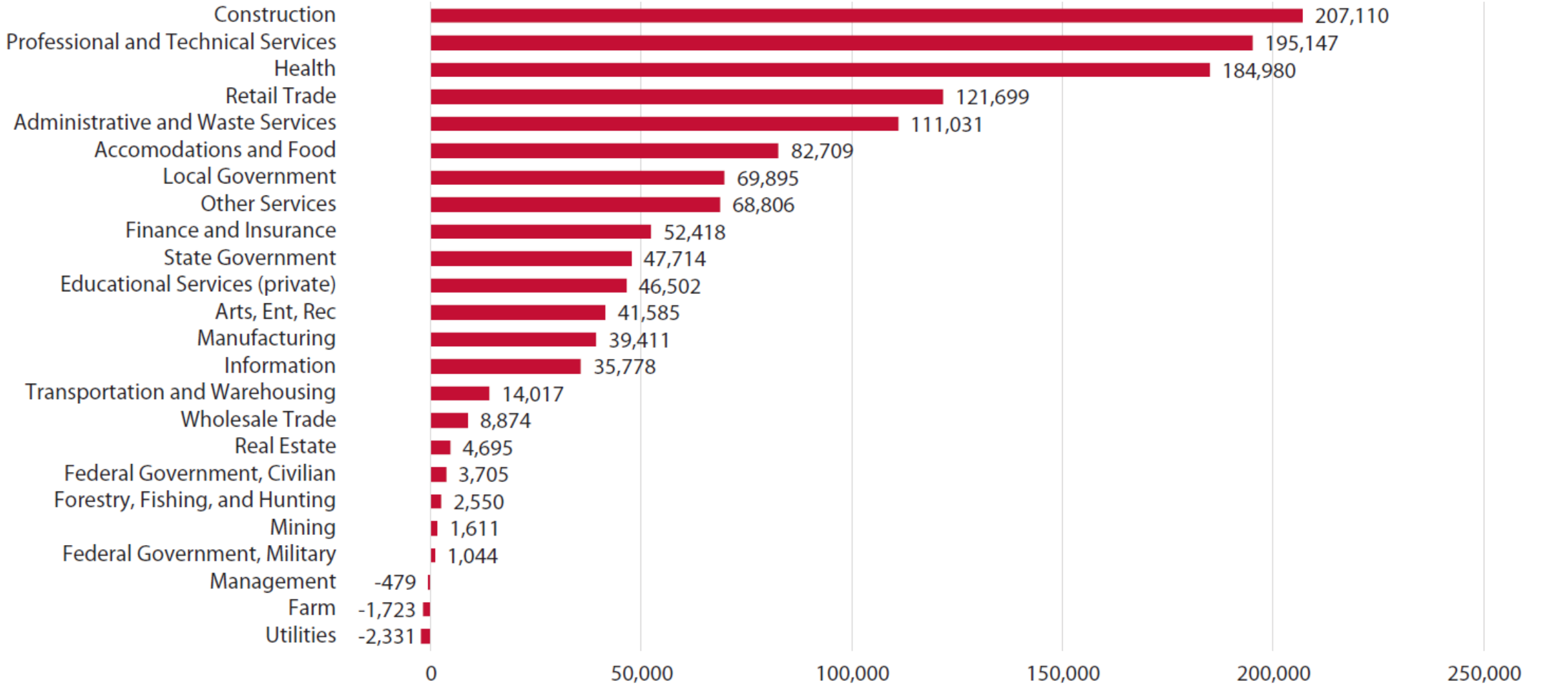
Source: Kem C. Gardner Policy Institute, 2020-2060 Projections

Historical and Projected Employment Change, 1980-2060



Source: Kem C. Gardner Policy Institute, 2020-2060 Projections

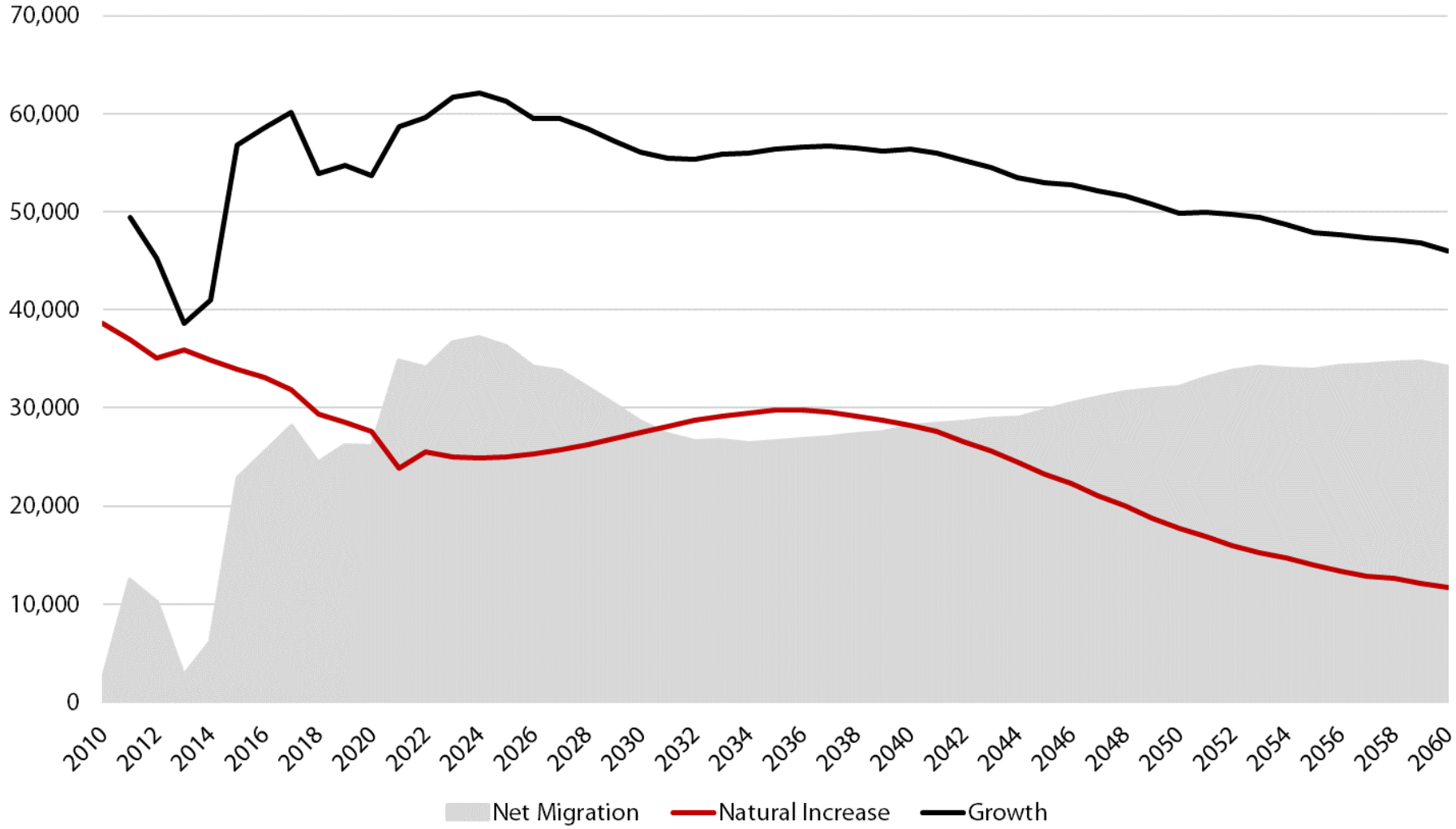
Utah Projected Employment Growth by Industry, 2020 to 2060



Source: Kem C. Gardner Policy Institute, 2020-2060 Projections

Net migration becomes a more dominant driver of statewide population change

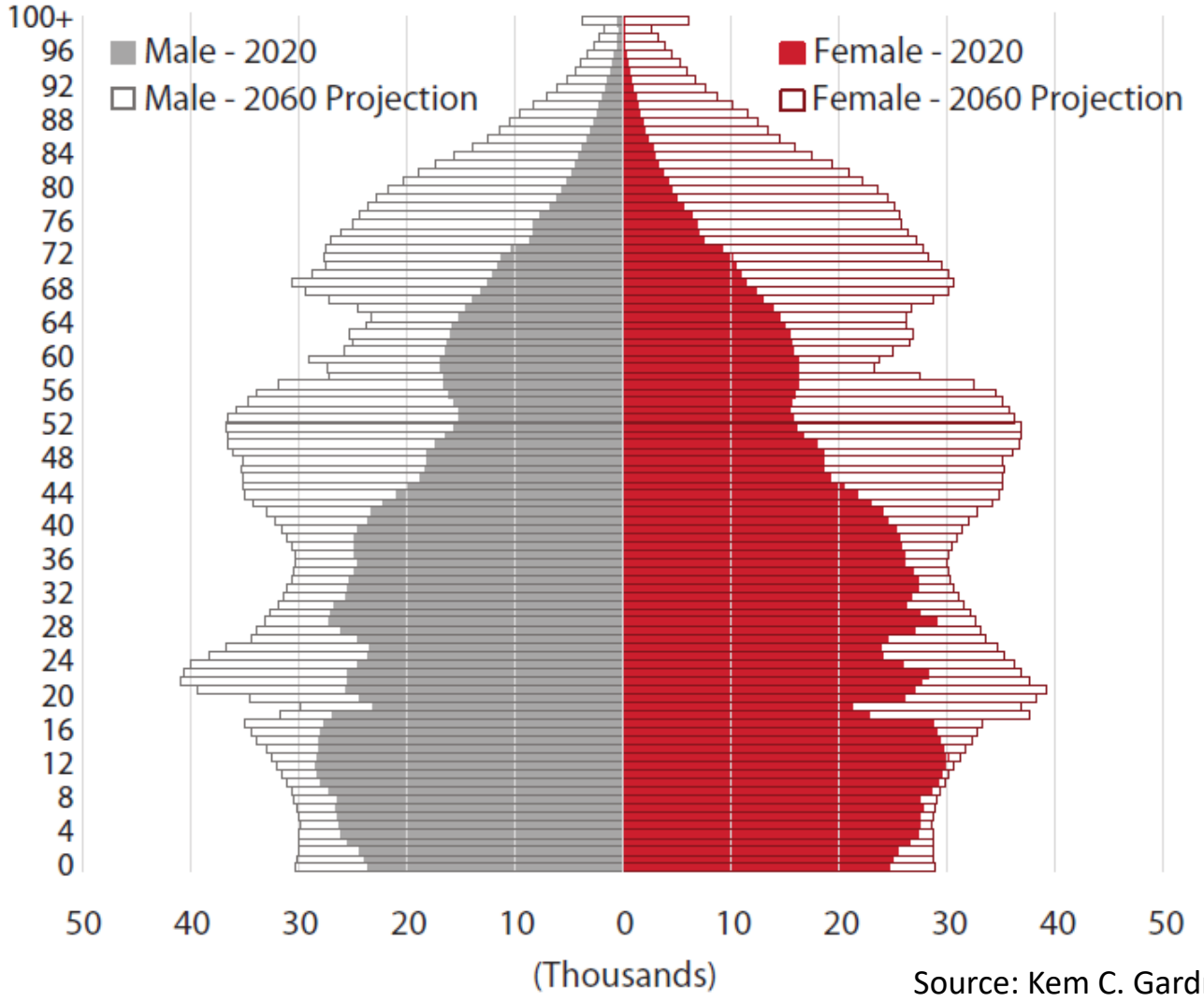
Projected Utah Components of Change, 2010-2060



Source: Kem C. Gardner Policy Institute, 2020-2060 Projections

Changes to age structure are projected to continue

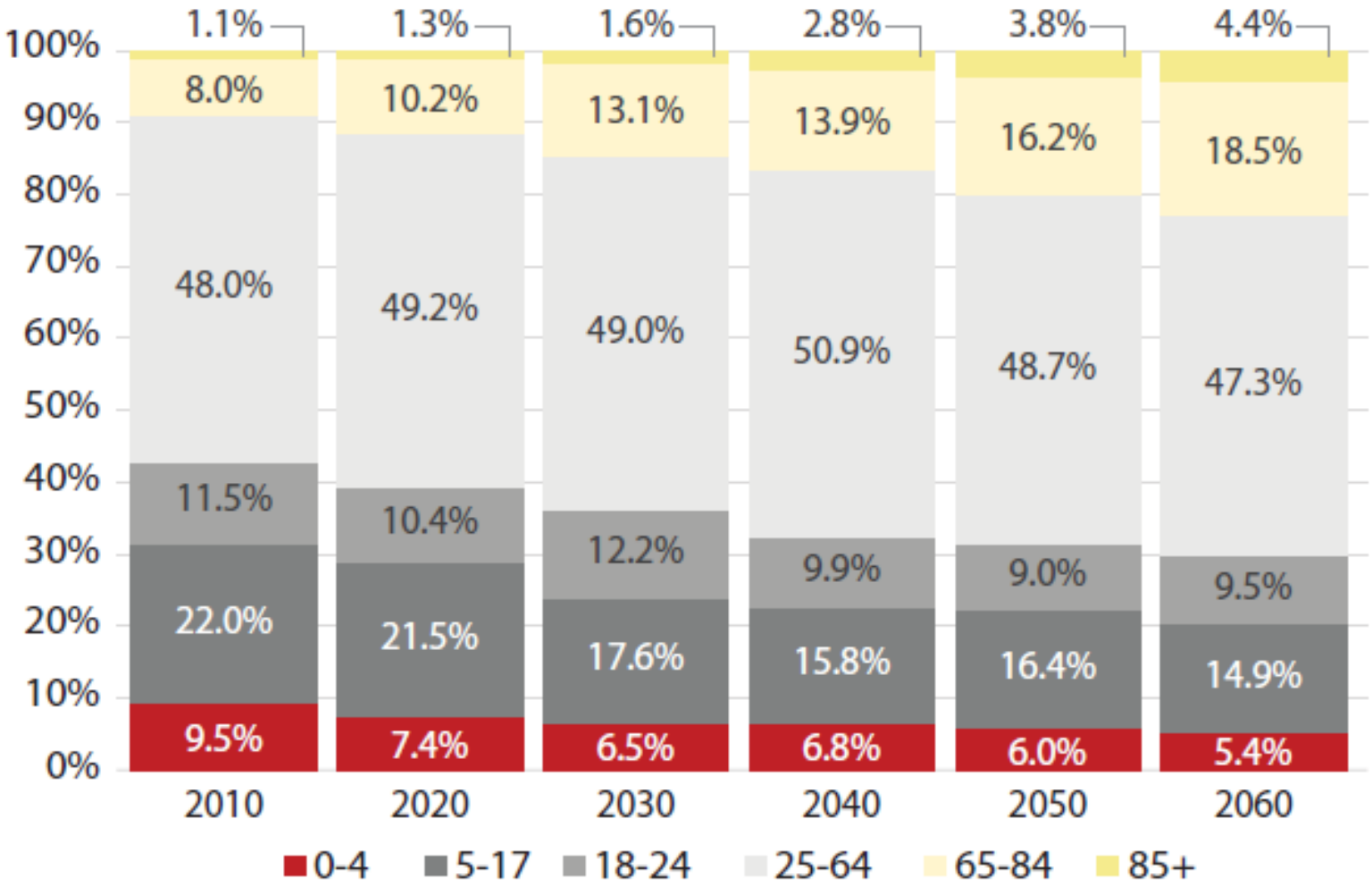
Utah Population Pyramid, 2020 and 2060



Source: Kem C. Gardner Policy Institute, 2020-2060 Projections

Changes to age structure are projected to continue

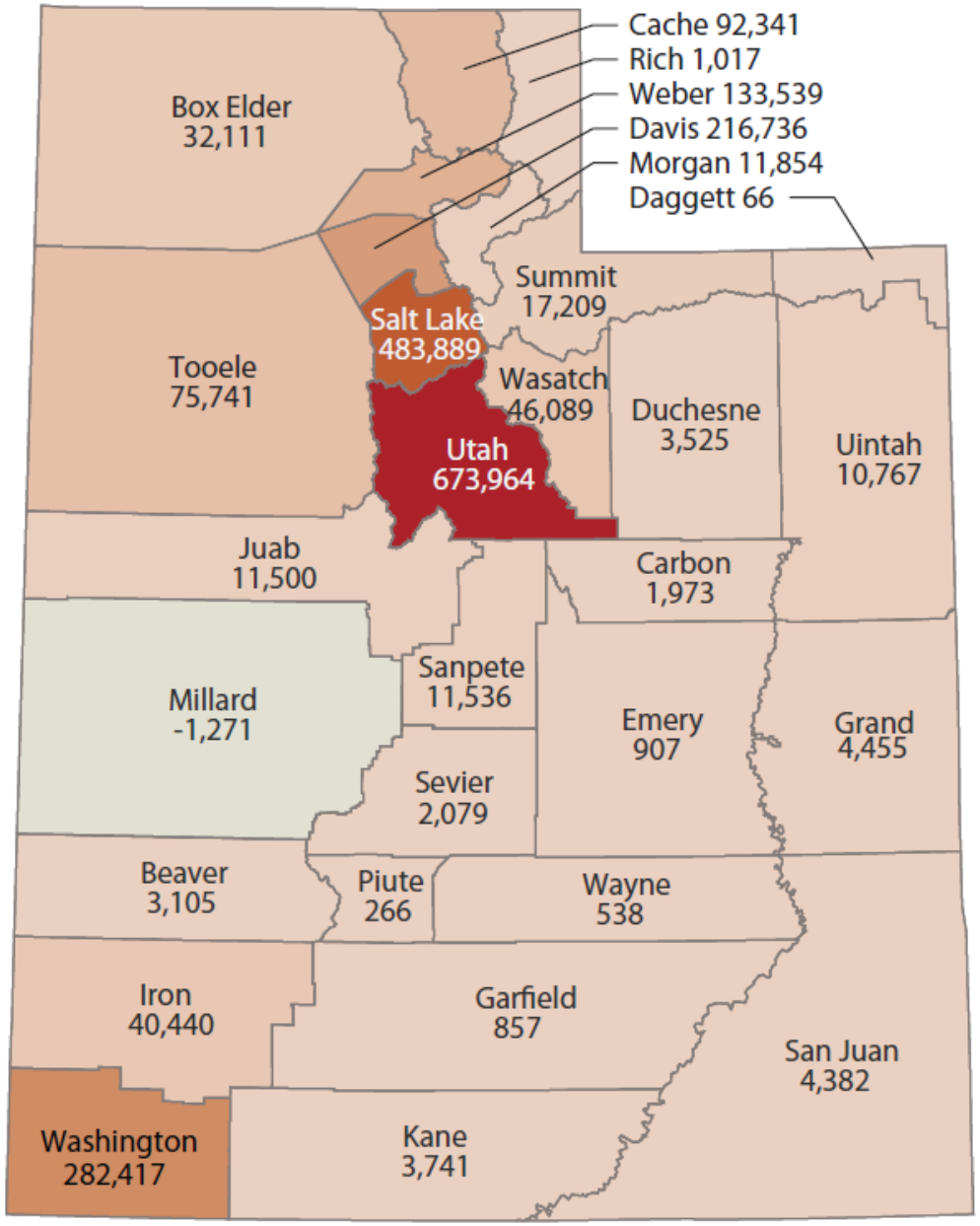
Selected Utah Age Groups as a Percent of Total Population, 2010-2060



Source: Kem C. Gardner Policy Institute, 2020-2060 Projections

Urban counties lead population and household growth

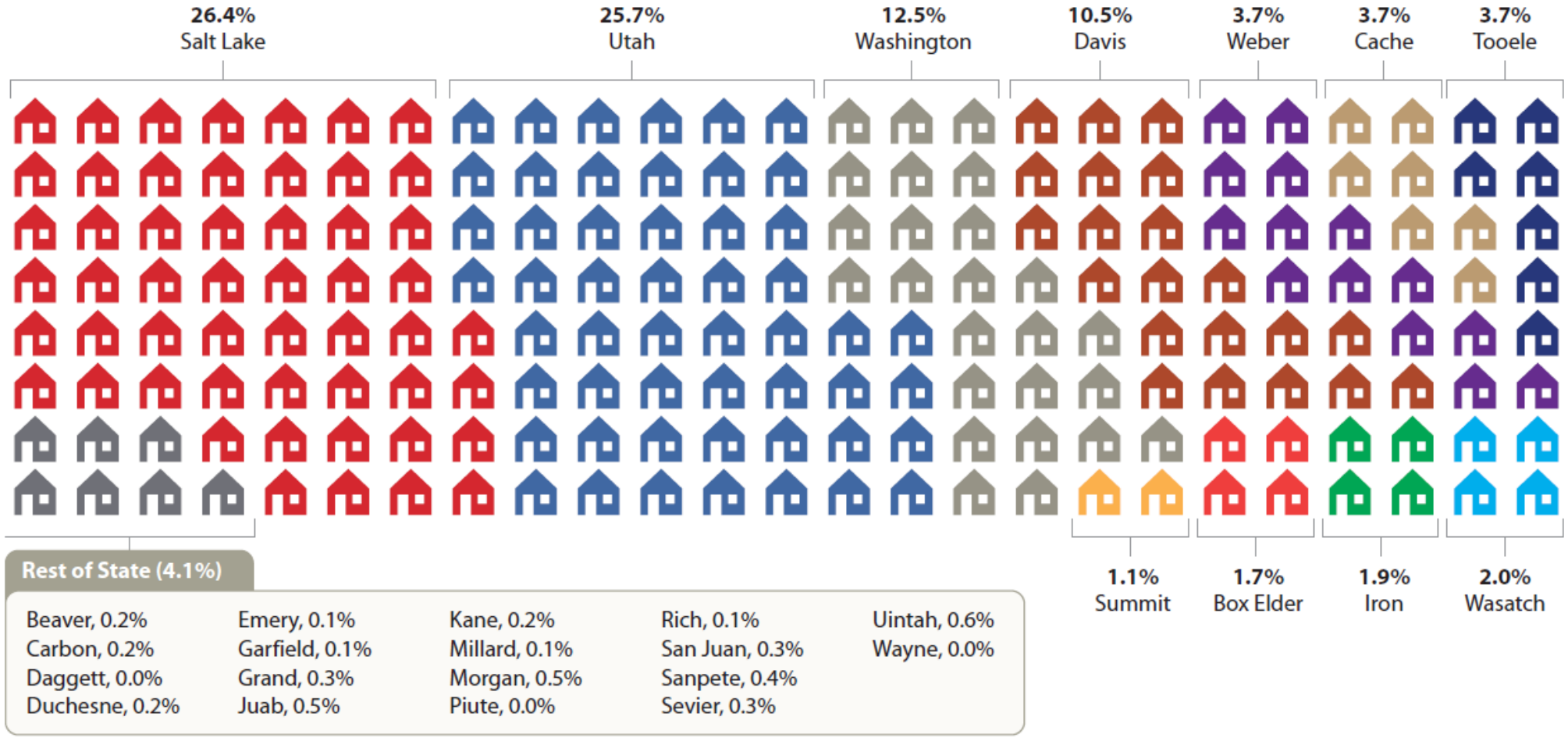
Utah Projected County Population Change, 2020 to 2060



Source: Kem C. Gardner Policy Institute, 2020-2060 Projections

Urban counties lead population and household growth

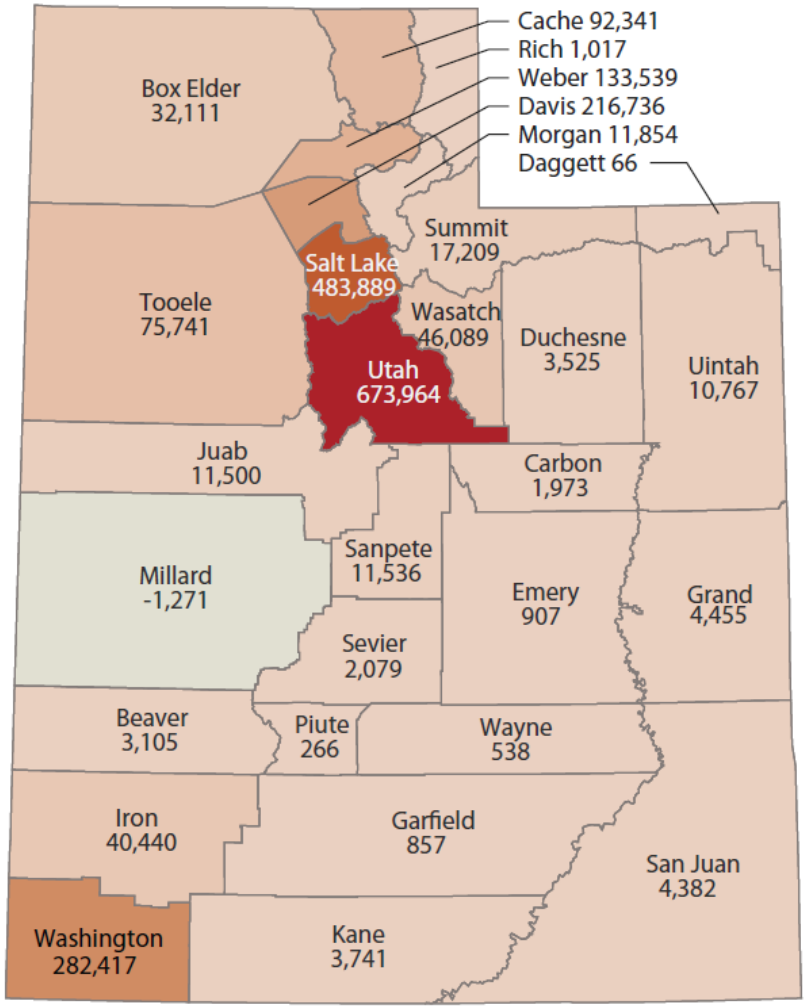
County Share of Projected State Household Growth, 2020-2060



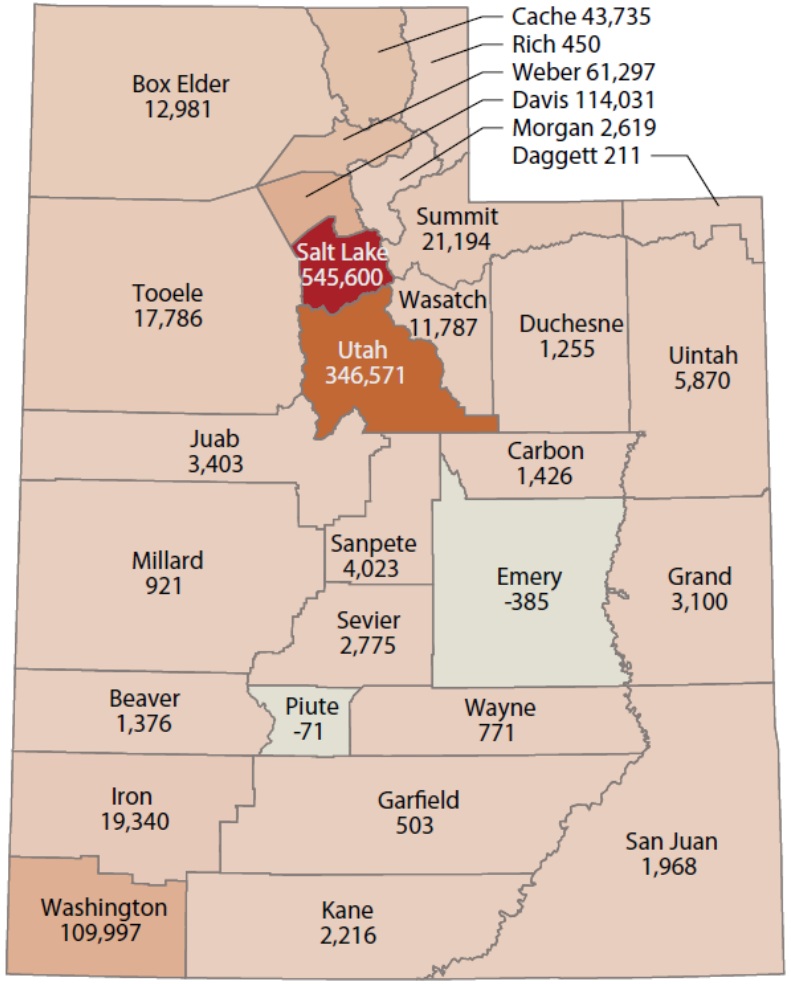
Source: Kem C. Gardner Policy Institute, 2020-2060 Projections

Job growth is more urbanized

Utah Projected County Population Change, 2020 to 2060



Projected Job Growth by County, 2020 to 2060



Source: Kem C. Gardner Policy Institute, 2020-2060 Projections

Industry growth differs throughout the state

Top 10 Counties, Projected Manufacturing Employment Growth, 2020–2060

Area	Projected Manufacturing Employment Growth	Share of Projected Growth
State of Utah	39,411	n/a
County		
Salt Lake	12,506	31.7%
Utah	7,663	19.4%
Weber	5,839	14.8%
Cache	4,020	10.2%
Washington	2,839	7.2%
Davis	2,014	5.1%
Box Elder	1,631	4.1%
Tooele	894	2.3%
Iron	389	1.0%
Juab	374	0.9%
Top 10 Total	**38,169**	**96.8%**

Top 10 Counties, Projected Professional, Scientific, and Technical Service Industry Employment

Area	Professional, Scientific,and Technical Service	Share of Projected Growth
State of Utah	195,147	n/a
County		
Salt Lake	94,738	48.5%
Utah	56,542	29.0%
Davis	13,117	6.7%
Washington	9,277	4.8%
Weber	6,063	3.1%
Cache	5,529	2.8%
Summit	3,629	1.9%
Wasatch	1,420	0.7%
Iron	1,170	0.6%
Tooele	765	0.4%
Top 10 Total	**191,485**	**98.1%**

Source: Kem C. Gardner Policy Institute, 2020-2060 Projections

Additional content

Assumptions

Demographic Assumptions

Fertility

Lower total fertility rates than v2017, based on more recent data

Results in:

- Fewer births
- Lower household sizes
- Aging of population
- Larger role of net migration

Mortality

Similar life expectancy trends as v2017

Minor COVID-19 adjustment included in 2021, but not long-term

Net Migration

Driven largely by economic projections

Age-specific migration rates are similar to v2017

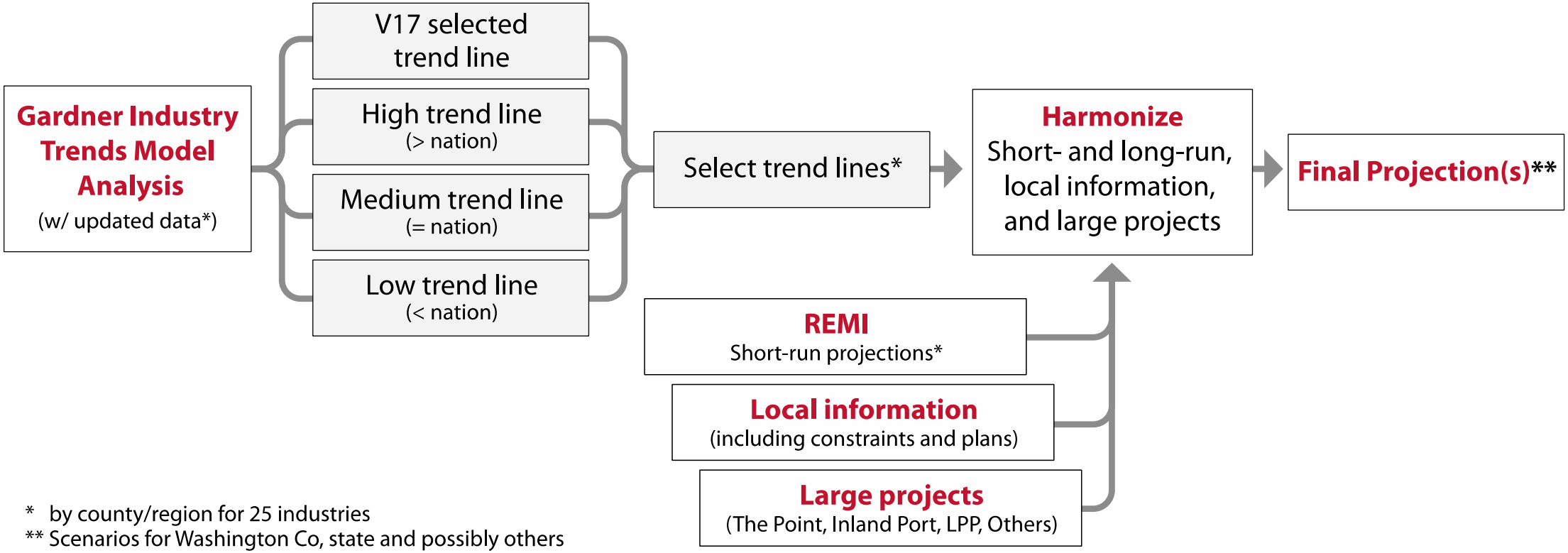
Economic Special Events in Model

Coal-Fired Power Plant Closures	Point-of-the-Mountain	Coal Mining	2030 Winter Olympics
Millard County, 2025 Uintah County, 2030 Emery County, 2036 and 2042	Impacts of redevelopment effort through 2045	Use analysis from Coal Country Scenarios, extended to Carbon, Emery, Kane, Sanpete, and Sevier	Direct impacts begin in 2024, end in 2031 Limited to Greater Salt Lake Economic Region

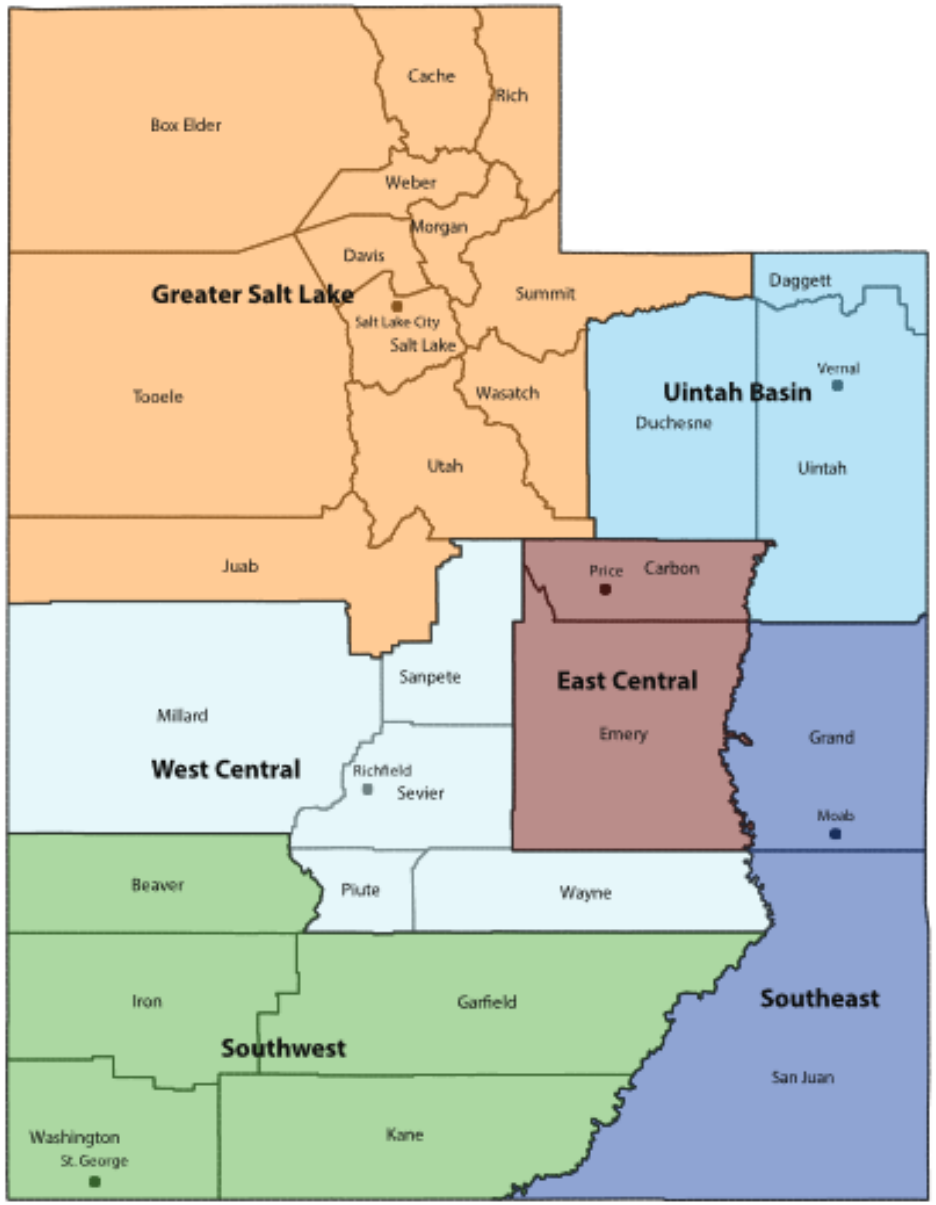
Methodology

Vintage 2021 Economic Projection Process

Economic/Industry Drivers



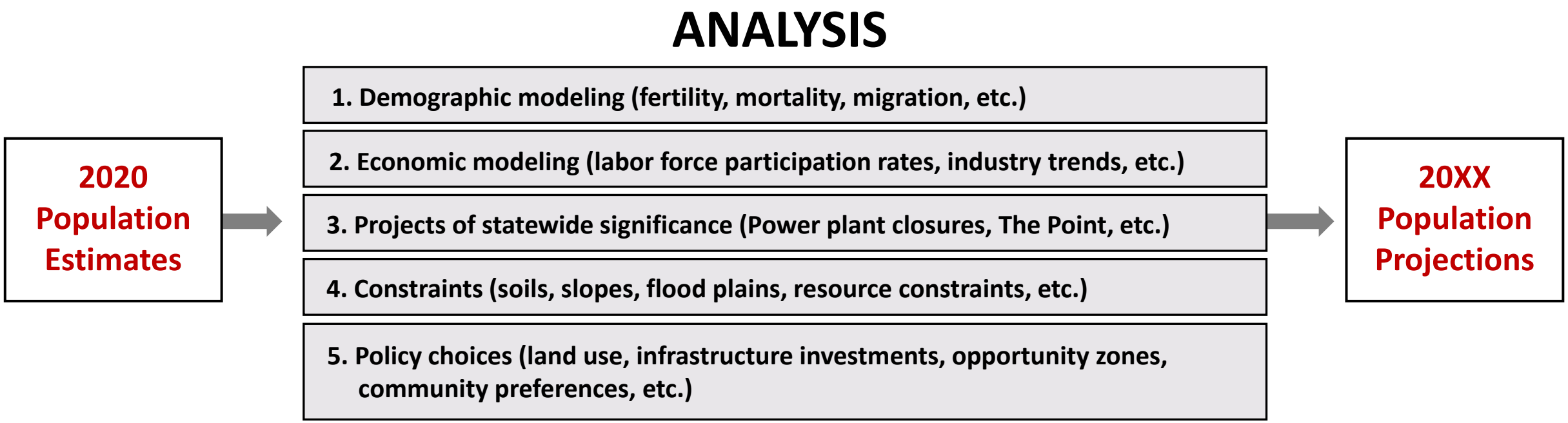
* by county/region for 25 industries
** Scenarios for Washington Co, state and possibly others



Source: Kem C. Gardner Policy Institute and State of Utah, SGID

Economic Regions Provide Basis for Model Framing

What determines future population projections?



Notes:

- Kem C. Gardner Policy Institute analyzes economic and demographic trends, including projects of statewide significance (Analysis Boxes 1-3)
- Local experts advise the Gardner Institute on policy choices relevant to long-term economics and demographics, including transportation and water infrastructure development (Analysis Box 5)
- Demographic and economic projections alone cannot answer the question of future infrastructure needs.

The Population-Policy Feedback Loop

SUMMARY

Existing and future environmental constraints and policy choices, such as infrastructure investments, serve as an input to future population projections.

For this reason, population projections alone cannot be used to justify infrastructure or major project investment.

Infrastructure investment is an input that affects future population levels.

Decision-making should acknowledge this feedback loop in their planning decisions.