Gardner Institute
Long-Term Planning Projections
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
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

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

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

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

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

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

<table>
<thead>
<tr>
<th>Event Type</th>
<th>Event Details</th>
</tr>
</thead>
</table>
| **Coal-Fired Power Plant Closures** | Millard County, 2025  
Uintah County, 2030  
Emery County, 2036 and 2042 |
| **Point-of-the-Mountain**   | Impacts of redevelopment effort through 2045                                |
| **Coal Mining**             | Use analysis from Coal Country Scenarios, extended to Carbon, Emery, Kane, Sanpete, and Sevier |
| **2030 Winter Olympics**   | Direct impacts begin in 2024, end in 2031  
Limited to Greater Salt Lake Economic Region |
Methodology
Vintage 2021 Economic Projection Process

Economic/Industry Drivers

Gardner Industry Trends Model Analysis (w/ updated data*)

- V17 selected trend line
- High trend line (> nation)
- Medium trend line (= nation)
- Low trend line (< nation)

Select trend lines*

Harmonize Short- and long-run, local information, and large projects

Final Projection(s)**

- REMI Short-run projections*
- Local information (including constraints and plans)
- Large projects (The Point, Inland Port, LPP, Others)

* by county/region for 25 industries
** Scenarios for Washington Co, state and possibly others
Economic Regions Provide Basis for Model Framing
What determines future population projections?

**ANALYSIS**

1. Demographic modeling (fertility, mortality, migration, etc.)
2. Economic modeling (labor force participation rates, industry trends, etc.)
3. Projects of statewide significance (Power plant closures, The Point, etc.)
4. Constraints (soils, slopes, flood plains, resource constraints, etc.)
5. Policy choices (land use, infrastructure investments, opportunity zones, community preferences, etc.)

**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.
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.