

UTAH INFORMED

V I S U A L I N T E L L E C T I O N F O R 2 0 2 1

Kem C. Gardner Policy Institute

DAVID ECCLES SCHOOL OF BUSINESS | UNIVERSITY OF UTAH

In Partnership with the Salt Lake Chamber

KEM C. GARDNER POLICY INSTITUTE

We are an honest broker of

INFORMED
RESEARCH

that guides

INFORMED
DISCUSSIONS

and leads to

INFORMED
DECISIONS™

January 2021

Dear friends,

“You may not be interested in the virus, but the virus is interested in you.” This modified Leo Tolstoy quote summarizes much of 2020 and the start of 2021. COVID-19 came seemingly from out of nowhere and impacted every facet of our lives, livelihoods, and lifestyles.

Through all of the struggle, disruption, and pain we’ve been taught many lessons. Among others we’ve learned...

- Pandemics wreak havoc on society, leaving a trail of commotion and misery in their wake.
- COVID-19 hurts some people, industries, and areas more than others.
- Free societies like ours—notwithstanding all of the benefits—struggle to contain a contagious pathogen.
- People and businesses innovate and adapt to meet serious challenges. Even better, they reach out and help one another.
- Well diversified economies like Utah’s fare better when economic hardship strikes.

- When you focus on one problem you lose perspective. Pandemics demand a balanced response.
- Modern medicine makes miracles happen.
- And, health care and other frontline workers are today’s heroes in every sense of the word.

This 2021 edition of Utah Informed captures these and other lessons with the hope that the information provided will help us put this historic pandemic behind us. We can emerge stronger and better than before.

The Kem C. Gardner Policy Institute serves as an honest broker of informed research, that guides informed discussions, and leads to INFORMED DECISIONS™.

Thanks for your interest,



Natalie Gochour
Director, Kem C. Gardner Policy Institute



Taylor Randall
Dean, David Eccles School of Business



Derek Miller
President & CEO, Salt Lake Chamber

Contents

Current Affairs

Words and phrases to know in 2021	5
Top Google searches in United States, 2020.....	6
Business cycles of the world	8
COVID-19 cases per 1,000,000 population by select country.....	9
University of Utah Health quick facts	10
Year-over movie theater ticket sales, 1996–2020	12
Voter turnout in Utah, 2000–2020	13
Voter turnout by county, 2020.....	14
Potential need for early childhood mental health services in Utah	15

Utah Economy

Major central bank balance sheets.....	16
Jobs ranked by 2019 average weekly earnings.....	17
U.S. and Utah indices of consumer sentiment, 2020 ..	18
Utah CEO Outlook confidence index.....	19
State-level social capital index, 2018.....	20
Utah non-mortgage household debt by type, 2003–2019.....	21
Industrial bank assets, 2020	22
Utah RV sales.....	23
Distribution of jobs and population in Utah, 2020 ...	24
Utah’s economic regions	25
State-level Hachman Index, 2019.....	26

County-level Hachman Index.....	27
Utah’s universities total headcount by race/ethnicity	28
Rainy day fund balances as a percent of general fund expenditures, 2019	30
Year-over change in nonfarm employment	31
Year-over change in nonfarm employment in Utah’s counties.....	32
Federal financial assistance to Utah businesses during the pandemic	33
U.S. debt-to-GDP ratio, 1948–2020.....	34
State coincident indexes	35
Child care need and gaps in Utah before COVID-19 ..	36
United Way of Salt Lake 211 calls	37
Utah student outcomes based on economic status, 2018.....	38

Public Finance

CARES Act allocations by state as a share of estimated 2020 GDP	39
Utah taxable retail sales	40
Utah general obligation debt relative to constitutional debt limit	41
Utah’s top 10 trading partners and exports, 2020 ...	42
U.S. and Utah revenue sources, 2018.....	43

Real Estate and Construction

Home sales and listings in Utah.....	44
Home price growth in Utah, 2019–2020	45
Annual increase in households and housing units in Utah/cumulative shortage	47
Change in FHFA state-level house price index	48
Top 25 metro areas ranked by median sales price of single-family homes	49
Gap of affordable and available rental units for renters at 0–50% of area median income in Utah ..	50
Cumulative permitted commercial construction	51

Travel and Tourism

Year-over seated diners in U.S. and Utah	52
Leisure and hospitality taxable sales, 2019–2020	53
Utah leisure and hospitality employment, 2019–2020.....	54
Year-over change in travel-related spending and SLC International Airport passengers, 2019–2020.....	55
Year-over change in Utah park visitation, 2019–2020.....	56
Year-over change in hotel occupancy rates, Springdale vs. downtown Salt Lake City, 2019–2020.....	57

Energy and Environment

Fuel mix of electric power generation in Utah, 2020 ...	58
Rotary drilling rig count in Utah, 2010–2020	59
West Texas Intermediate crude oil prices, 2020.....	60
Year-over change in U.S. petroleum consumption, 2019–2020.....	61

Health

COVID-19 cases per 1,000,000 population by state ...	62
Cumulative COVID-19 case-fatality rates in Utah vs. U.S.....	63
Utah COVID-19 hospitalization rate per 1,000 cases and mortality rate per 100,000 population by race and ethnicity.....	64
Share of adults who report anxiety disorder symptoms in Utah vs. U.S., 2020.....	65
Utah telehealth visits by type.....	66
Utah childhood vaccinations	67
Public health funding per capita by state, 2019	68

Contents

Demographics

Multigenerational households, 2014–2018	69
Current Utah residents who lived in a different western state one year ago, 2019	70
Place of birth for Utah residents, 2019	71
Seasonal births and deaths indexes for Utah and six largest counties, 2001–2017	72
Natural increase in Salt Lake County and Utah County, 2010–2020	73
Net migration as a share of population change, 2020	74
Utah commuting data, 2018	75
COVID-19 Telework: Top-10 states	76
Top-10 self-response rates by state for 2020 Census. .	77

Utah Informed

The whole point.....	78
----------------------	----

Words and phrases to know in 2021

- **Contactless payment** - a secure method for consumers to purchase products or services by tapping or waving their credit or debit card above the payment reader. *Many businesses are offering **contactless payment** to reduce touchpoints during a customer's shopping experience.*
- **Currency volatility** - a situation in which the value of a country's currency changes suddenly and often. *Floating exchange rates have not resulted in **currency volatility**, as feared.*
- **Doomscrolling** - the tendency to continue to surf or scroll through bad news, even though the news is saddening, disheartening, or depressing. *If you are **doomscrolling**, it may be time to take a step back and ask yourself what you really need to know.*
- **Ecoanxiety** - a specific kind of anxiety caused by a dread of environmental perils, especially climate change. *The key to addressing **ecoanxiety** at any age is losing that feeling of paralysis in the face of the problem's magnitude.*
- **Hybrid workplace** - a company offering a permanent desk at an office, a work-at-home option, or some combination of the two. ***Hybrid workplace** is a model of flexibility, adaptability, and shared ownership between employers and employees.*
- **Infodemic** - an excessive amount of information about a problem, including misinformation, which makes it difficult to identify a solution. *We're not just fighting an epidemic; we're fighting an **infodemic**.*
- **Malarkey** - insincere or foolish talk; bunkum. *He thinks that everything politicians say is a bunch of **malarkey**.*
- **Monolith** - a free-standing column, 10-feet tall, made of stainless steel, first one was embedded into the rock found in the southern Utah desert. *Fox 13 reports that the **monolith** is believed by many to be a work of abstract art.*
- **Policy stimulus** - using government policies, including government spending and tax reductions, to boost economic activity. *Unable to use traditional remedies like monetary or fiscal **policy stimulus**, policymakers may consider automatic fiscal stabilizers.*
- **Quaranteens & coronababies** - those who are currently teenagers during the pandemic or babies conceived or born during the pandemic. *Social scientists wonder what the long-term effects will be on **quaranteens** and **coronababies**.*
- **Slowbalisation** - continued integration of the global economy via trade, financial and other flows albeit at a significantly slower pace. *We are now in an era of **slowbalisation**, or peak globalisation, with global trade slowing down.*
- **Social Distancing** - the practice of maintaining a greater than usual physical distance from other people during the outbreak of a contagious disease in order to minimize exposure and reduce transmission of infection. *Under a new **social distancing** strategy, handshaking could be discouraged, with other, less tactile forms of greeting taking its place.*
- **TikToker** - a person who regularly shares or appears in videos on TikTok, a social media platform. *The first **TikToker** to reach 100 million followers is just 16 years old.*
- **WFH** - an employee is working from their house, apartment, or place of residence, rather than working from the office. *Oftentimes your daily attire includes professional on top, pajamas on bottom. By altering attitudes toward **WFH**, COVID-19 may have forever changed the way we work.*

The year we learned to make masks

Top Google searches in United States, 2020

Searches

1. Election results
2. Coronavirus
3. Kobe Bryant
4. Coronavirus update
5. Coronavirus symptoms
6. Zoom
7. Who is winning the election
8. Naya Rivera
9. Chadwick Boseman
10. PlayStation 5

News

1. Election results
2. Coronavirus
3. Stimulus checks
4. Unemployment
5. Iran
6. Hurricane Laura
7. Super Tuesday
8. Stock market
9. Murder hornet
10. Australia fires

People

1. Joe Biden
2. Kim Jong Un
3. Kamala Harris
4. Jacob Blake
5. Ryan Newman
6. Tom Hanks
7. Shakira
8. Tom Brady
9. Kanye West
10. Vanessa Bryant

How to make...

1. How to make hand sanitizer
2. How to make a face mask with fabric
3. How to make whipped coffee
4. How to make a mask with a bandana
5. How to make a mask without sewing
6. How to make cloud bread
7. How to make Facebook avatar
8. How to make Bitmoji classroom
9. How to make disinfectant wipes
10. How to make a live wallpaper

Why...

1. Why were chainsaws invented
2. Why is there a coin shortage
3. Why was George Floyd arrested
4. Why is Nevada taking so long
5. Why is TikTok getting banned
6. Why did Kobe have 2 numbers
7. Why is everyone buying toilet paper
8. Why is it called COVID-19
9. Why is it called Juneteenth
10. Why is Australia on fire

Source: Google Trends

“WE ALL NEED TO START ACTING LIKE
HIGH SCHOOL
ATHLETES.

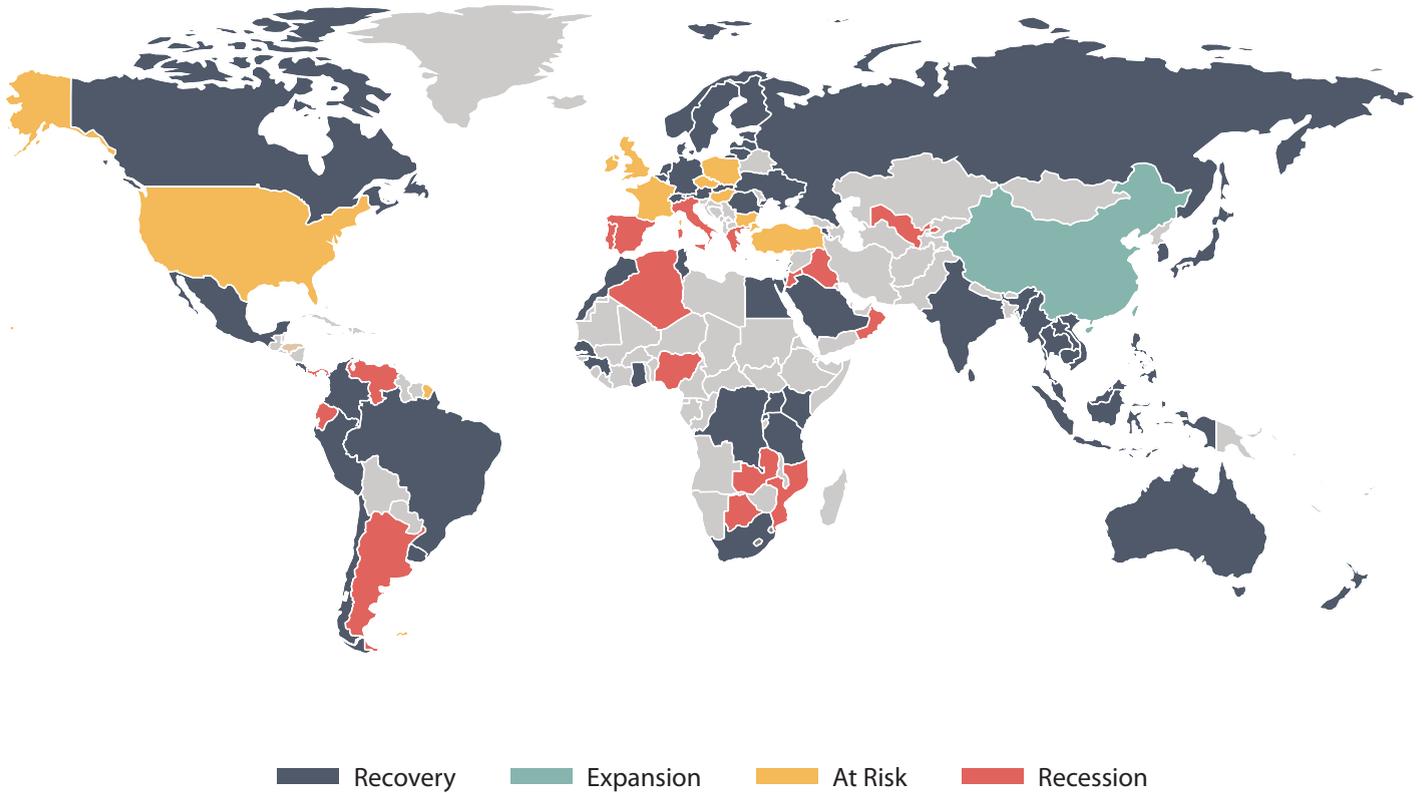
THEY HAVE SOMETHING THEY
CARE ABOUT
AND THEY ARE PROTECTING
THEIR ABILITY TO KEEP PLAYING. SO FIND THAT
THING THAT YOU CARE ABOUT AS
MUCH AS THESE ATHLETES
CARE ABOUT FOOTBALL, CHEER, AND DRILL.”

- Dr. Angela Dunn, Utah State Epidemiologist

As the world turns

Business cycles of the world

December 2, 2020

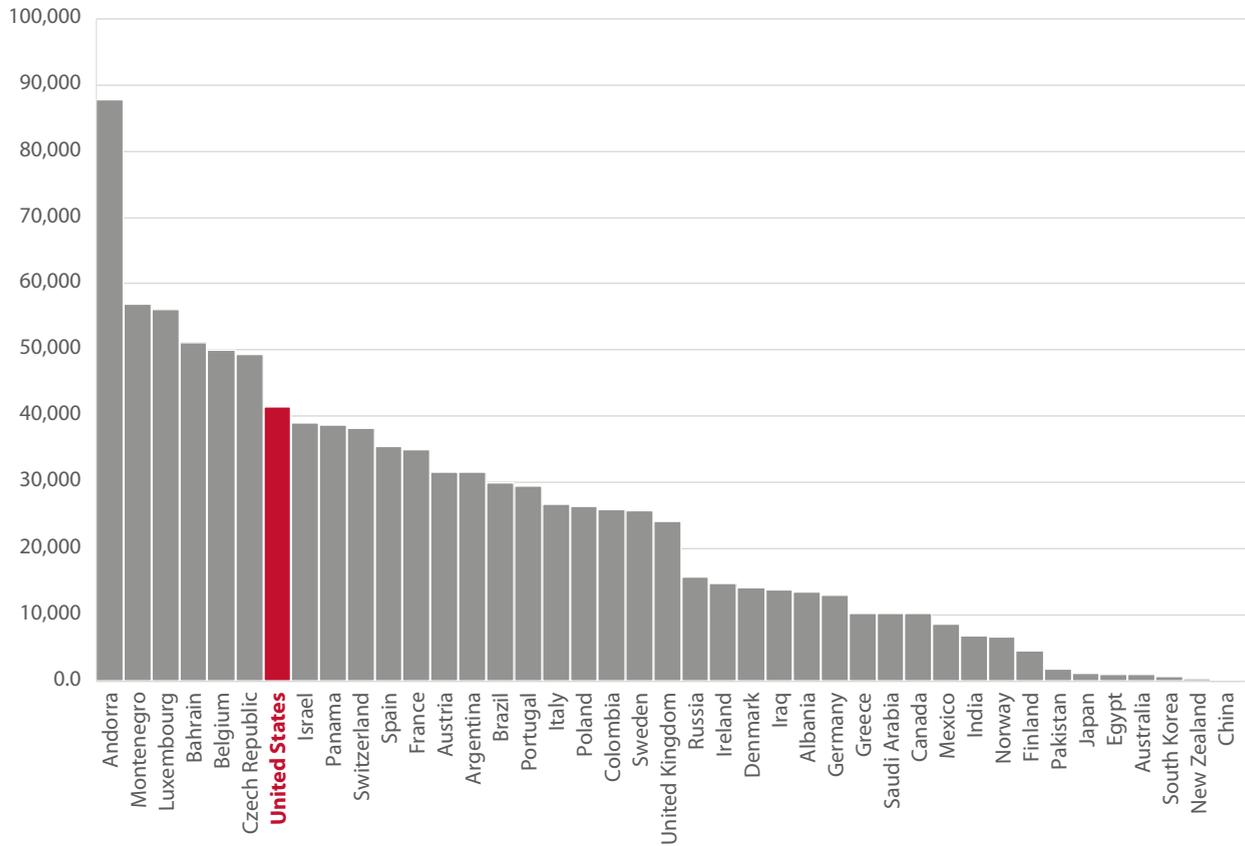


Source: Moody's Analytics

Not where we want to be

COVID-19 cases per 1,000,000 population by select country

December 1, 2020



Note: As of December 1, 2020, the U.S. had 13.7 million COVID-19 cases. The country with the next highest number of cases, India, had 9.5 million.

Source: Johns Hopkins University (JHU) Coronavirus Resource Center

Health care heroes: working together to combat COVID-19

University of Utah Health quick facts

As of December 23, 2020

346,880

COVID-19 tests performed

1,230

COVID-19 admits

10,860 COVID-19 hospital patient days

Novel research projects:

56 campus-wide research projects funded by the
National Science Foundation and National Institutes of Health

Peer reviewed COVID-19 journal publications:

Over 60 by University of Utah Health investigators

Testing:

ARUP Laboratories is one of the four largest reference laboratories in the nation

Volunteerism:

ProjectProtect mobilized more than 57,500 volunteers to sew nearly
six million masks in six weeks for health care workers

“THE CORONAVIRUS PANDEMIC HAS
CHALLENGED US IN NEW WAYS.

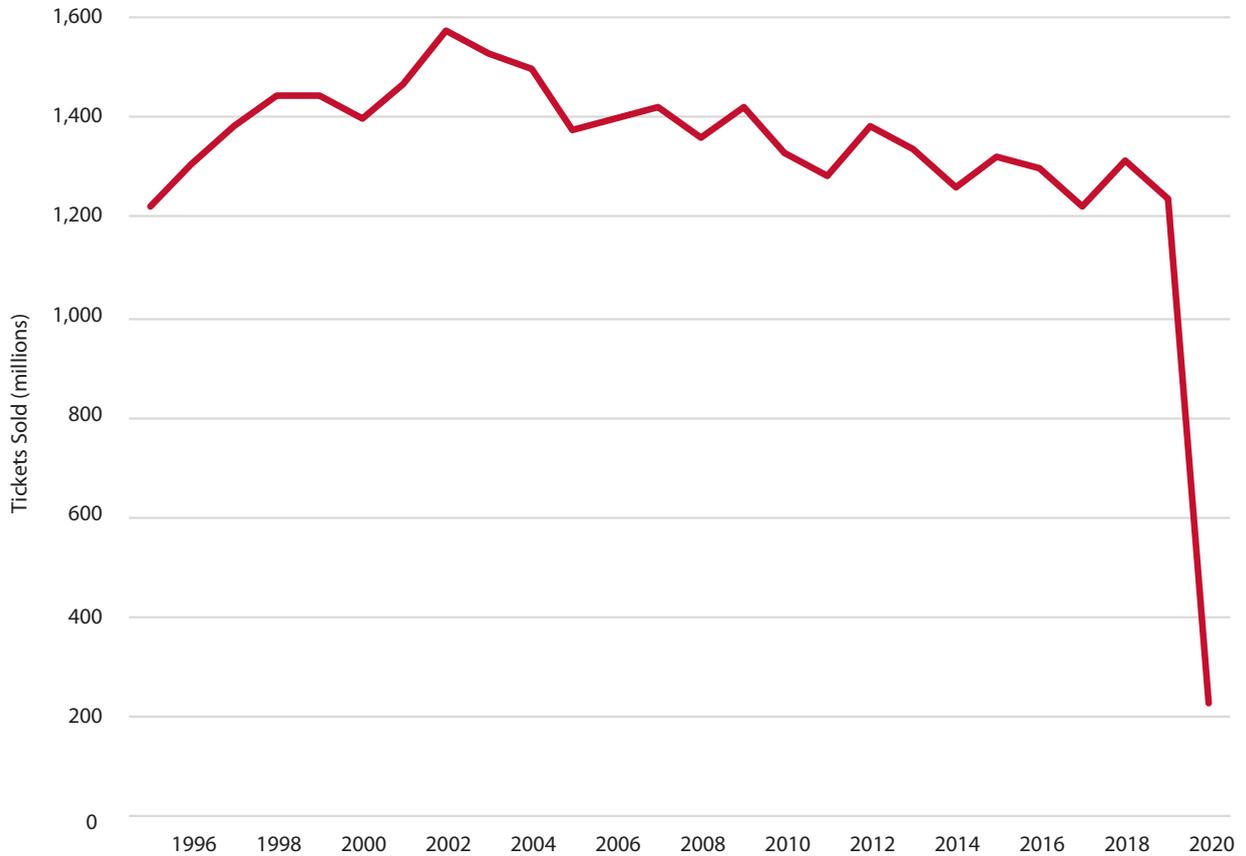
IT'S CHALLENGED US **MEDICALLY**
AND **SCIENTIFICALLY**.

IT'S ALSO CHALLENGED US TO RECOGNIZE HOW
INTERCONNECTED
OUR LIVES REALLY ARE – AND THAT LIVING
HEALTHY REQUIRES THAT WE WORK
TOGETHER.”

- Michael L. Good, MD
CEO, University of Utah Health
Dean, University of Utah School of Medicine
Lorris Betz Senior Vice President for Health Sciences

Netflix and chill

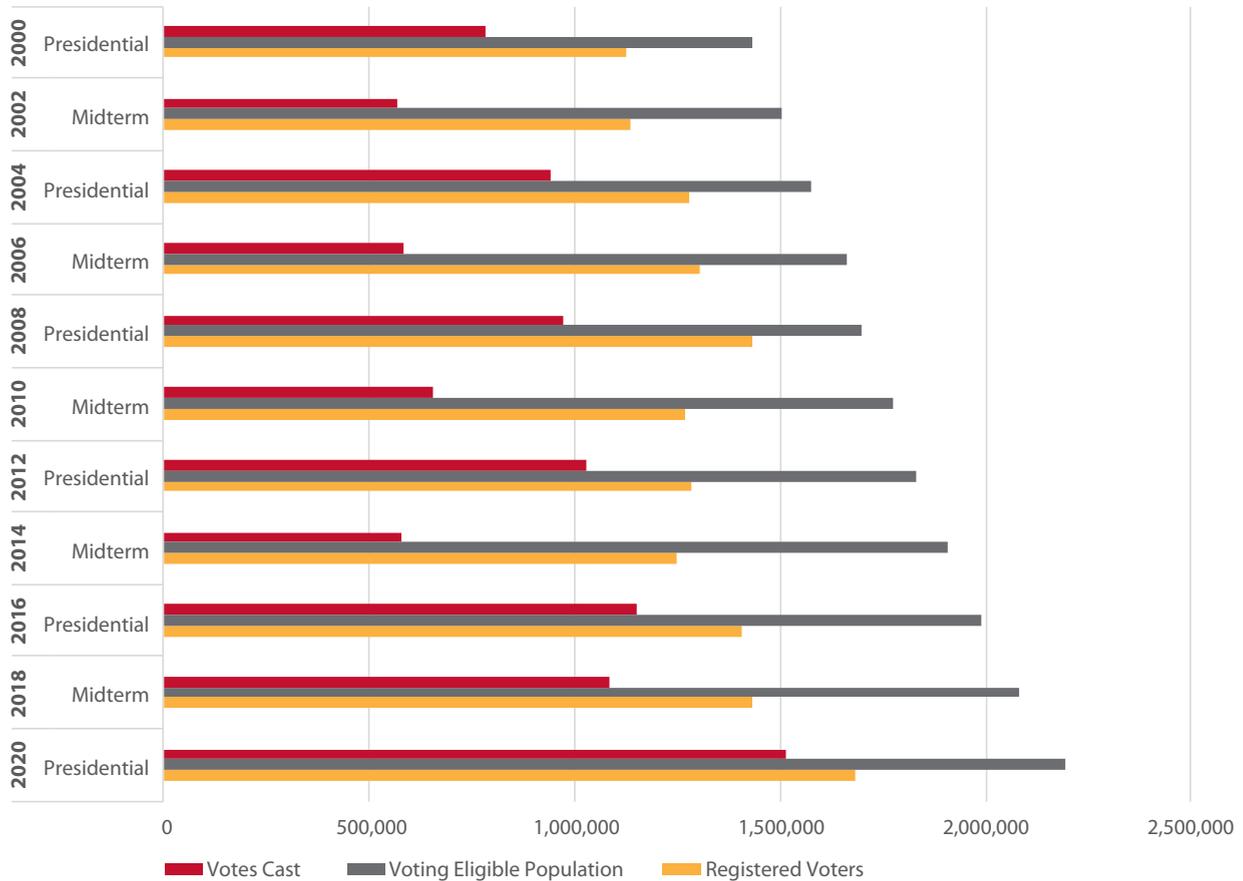
Year-over movie theater ticket sales, 1996–2020



Source: The Numbers, Where Data and the Movie Business Meet, Domestic Movie Theatrical Market Summary 1995 to 2020

Turnout tsunami

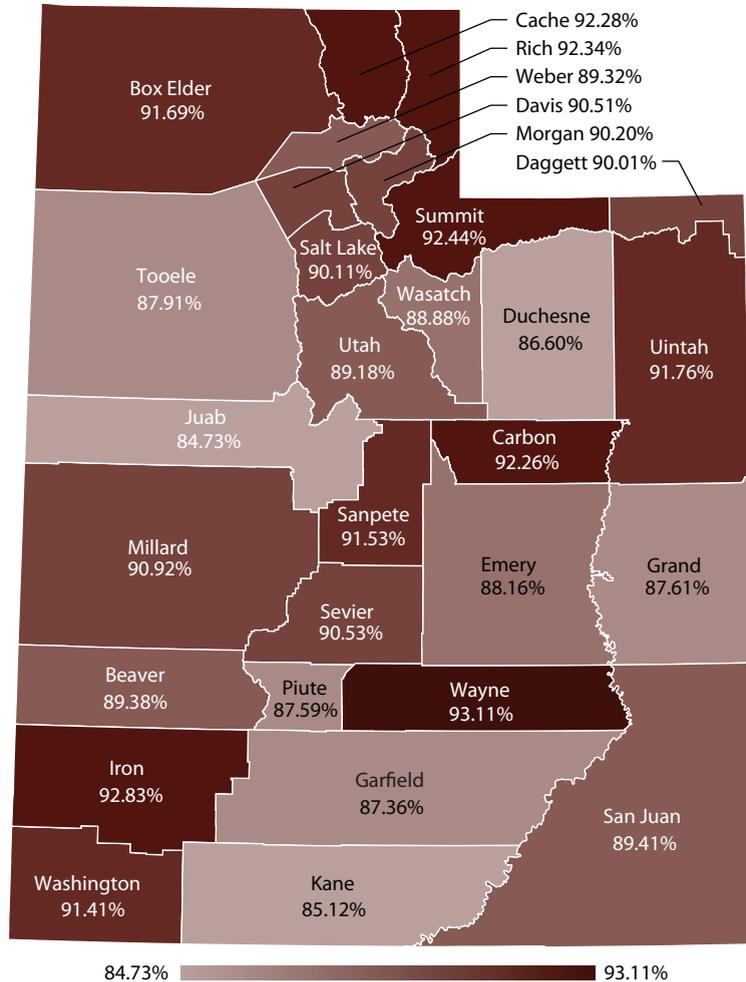
Voter turnout in Utah, 2000–2020



Source: Utah State Elections; Office of the Utah Lieutenant Governor

Get out the vote!

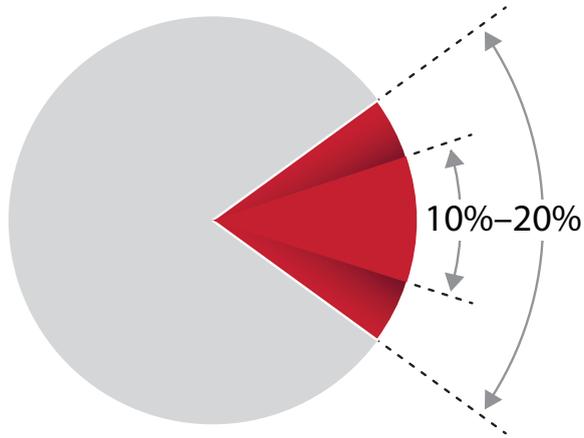
Voter turnout by county, 2020



Source: Utah State Elections; Office of the Utah Lieutenant Governor

For our kids

Potential need for early childhood mental health services in Utah



Based on a range of estimates from national studies,

10-20% of Utah's 458,000 children

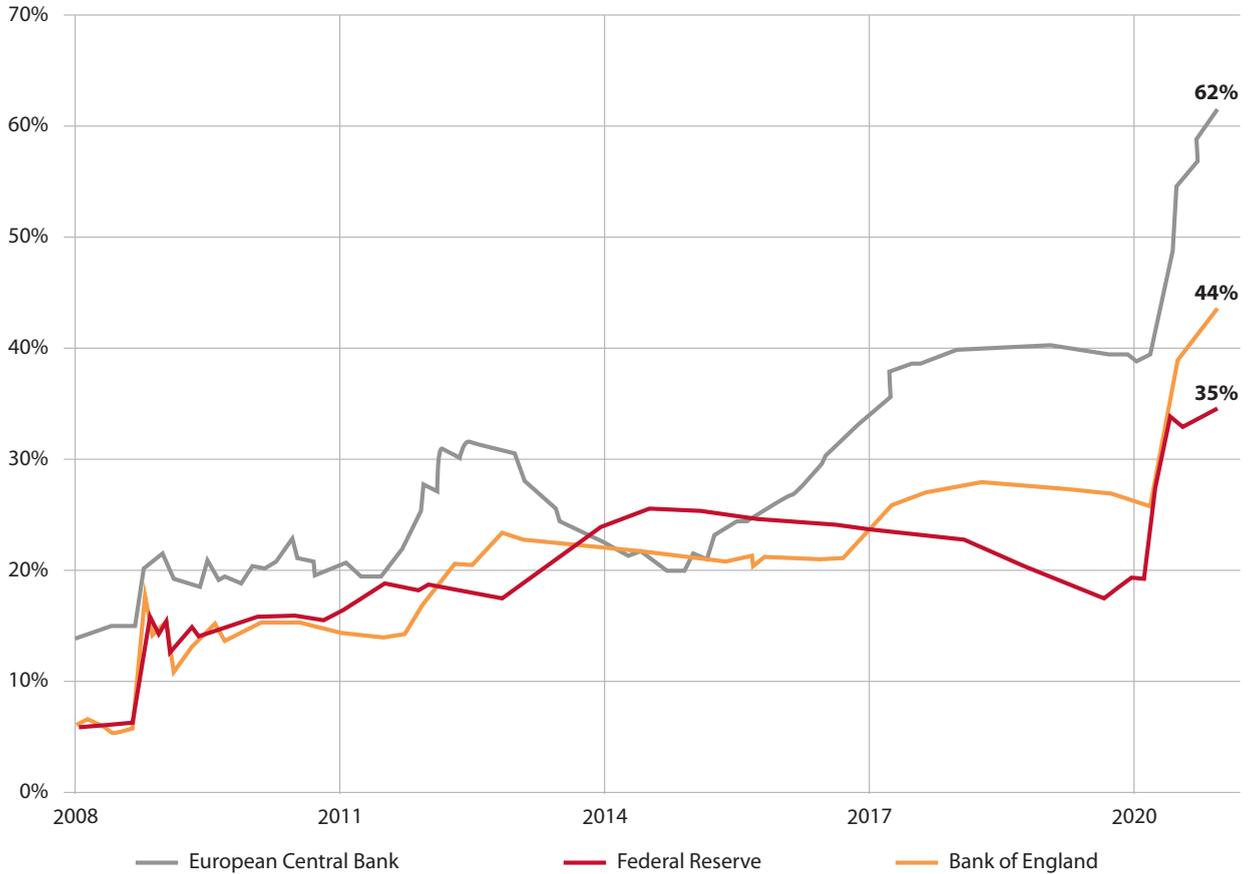
between the ages of 0–8 could experience mental, emotional, developmental, or behavioral challenges.

Note: Estimates shown are from national studies completed prior to the COVID-19 pandemic
Source: Child and Adolescent Health Measurement Initiative (2017-2018); Brauner C.B., Stephens CB. (2006); Cree R.A., Bitsko R.H., Robinson L.R., et al. (2016).

We're all monetary theorists now!

Major central bank balance sheets

Percent of GDP, December 11, 2020

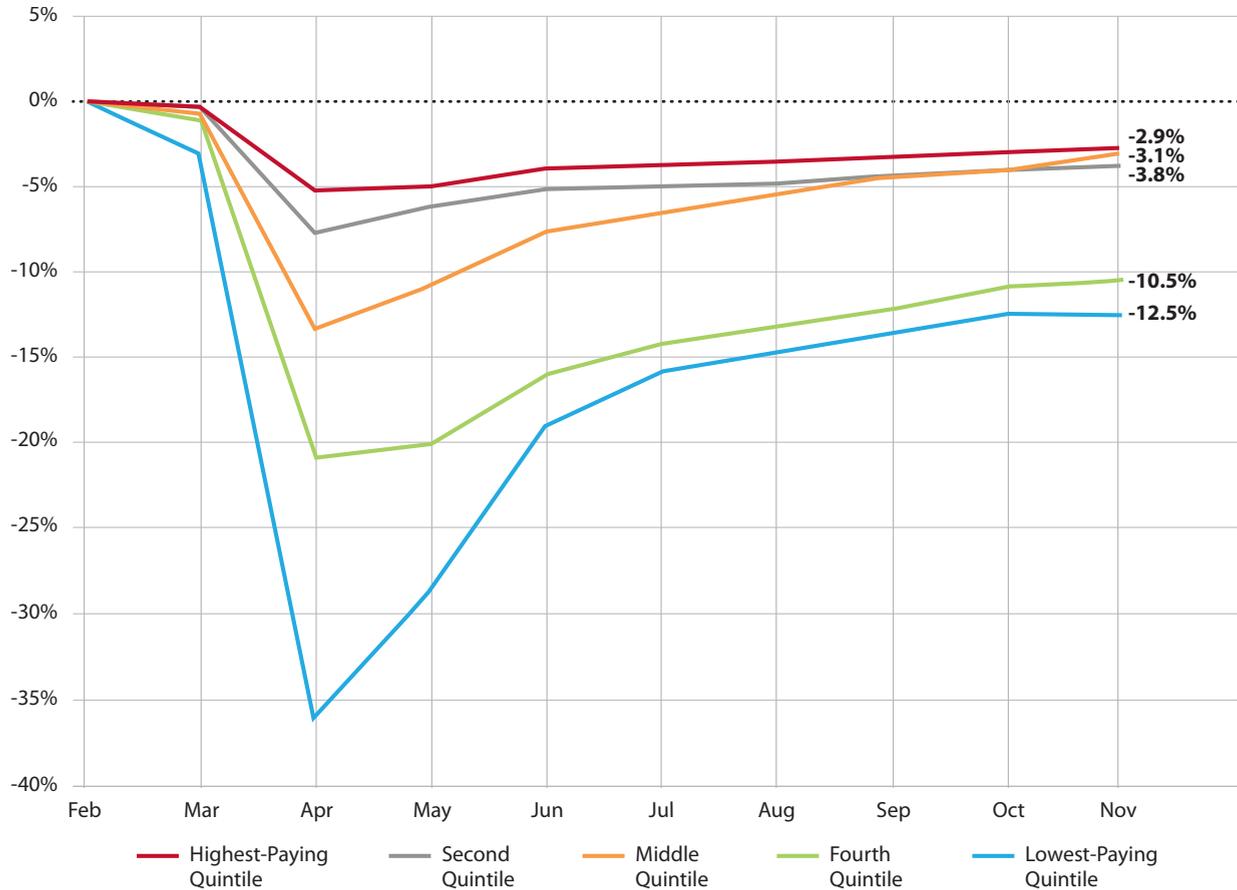


Source: Datastream and Wells Fargo Securities

Low-income workers feel the pain

Jobs ranked by 2019 average weekly earnings

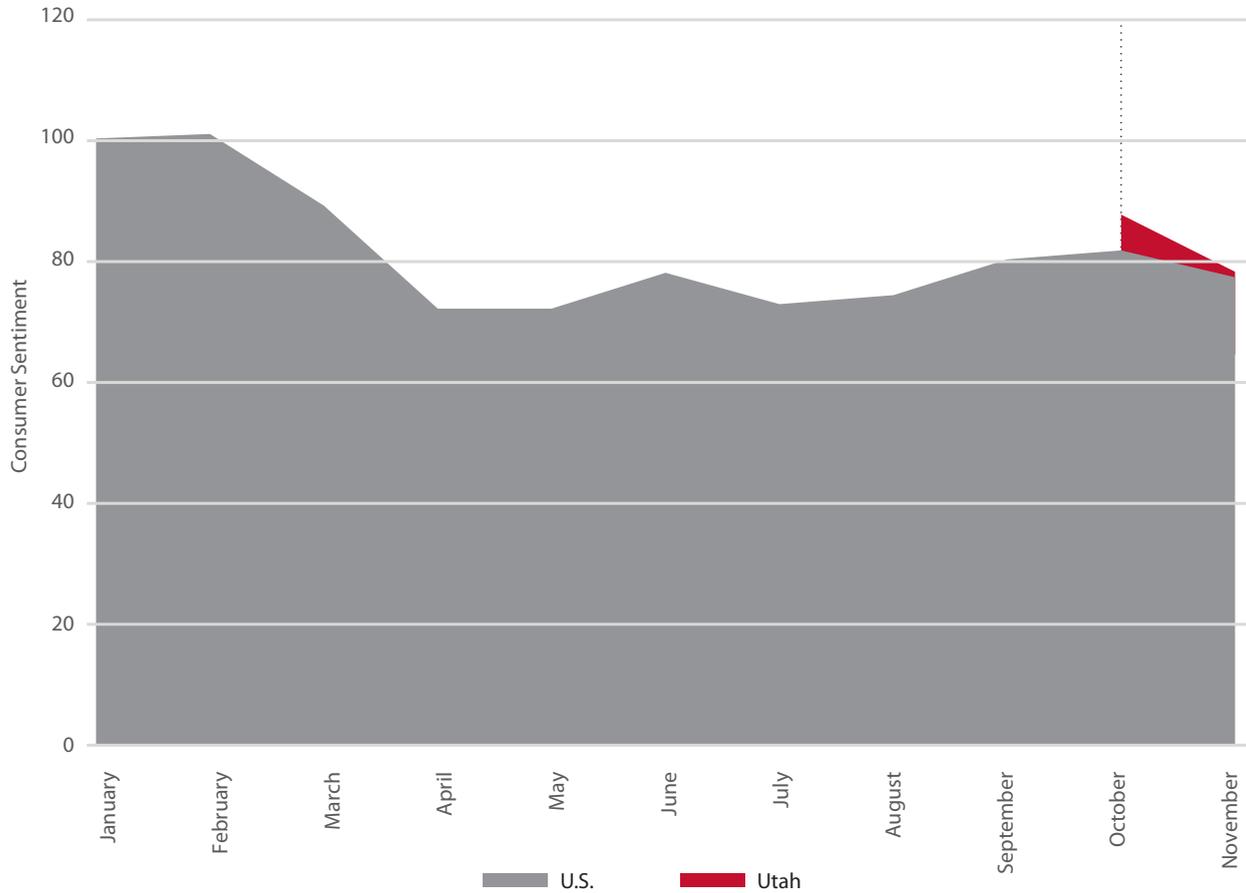
Percent change in employment from February 2020–November 2020



Source: U.S. Department of Labor and Wells Fargo Securities

Shaken confidence

U.S. and Utah indices of consumer sentiment, 2020



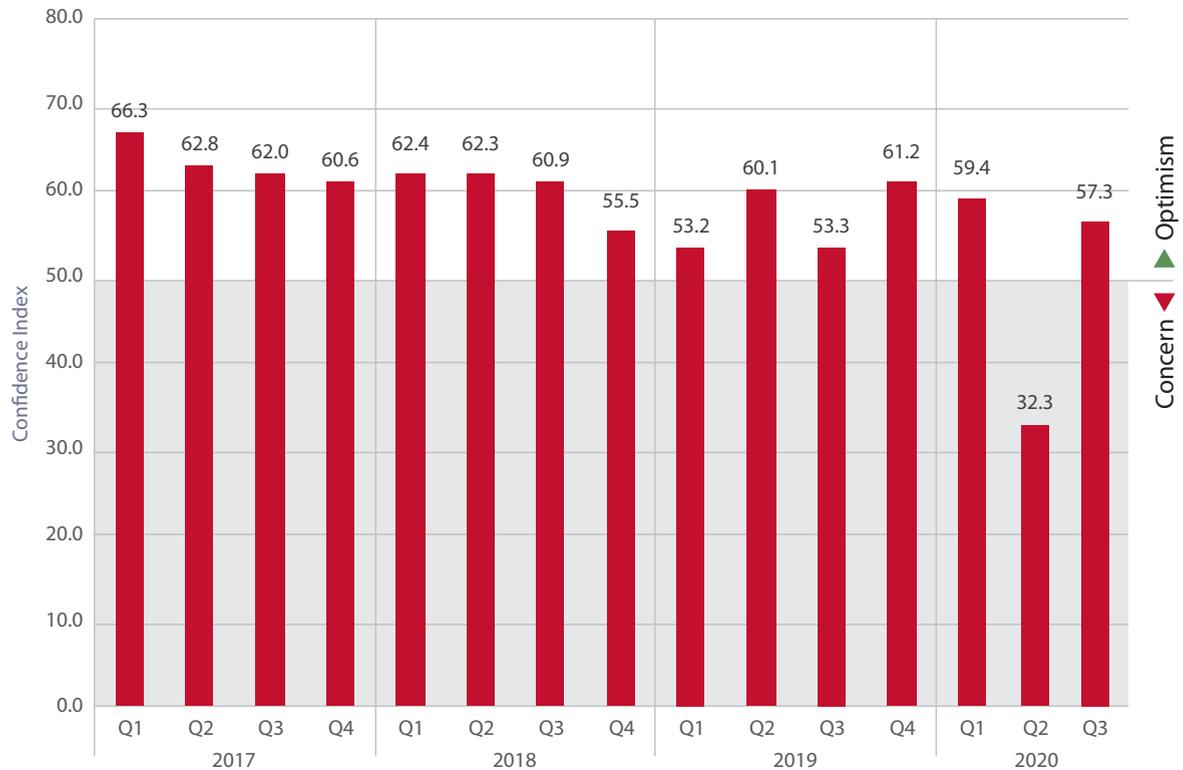
Note: Utah Consumer Confidence Index began in October 2020 and is ongoing

Source: U.S. Index of Consumer Sentiment, University of Michigan, and Utah Consumer Index, University of Utah

Hopeful CEOs

Utah CEO Outlook confidence index

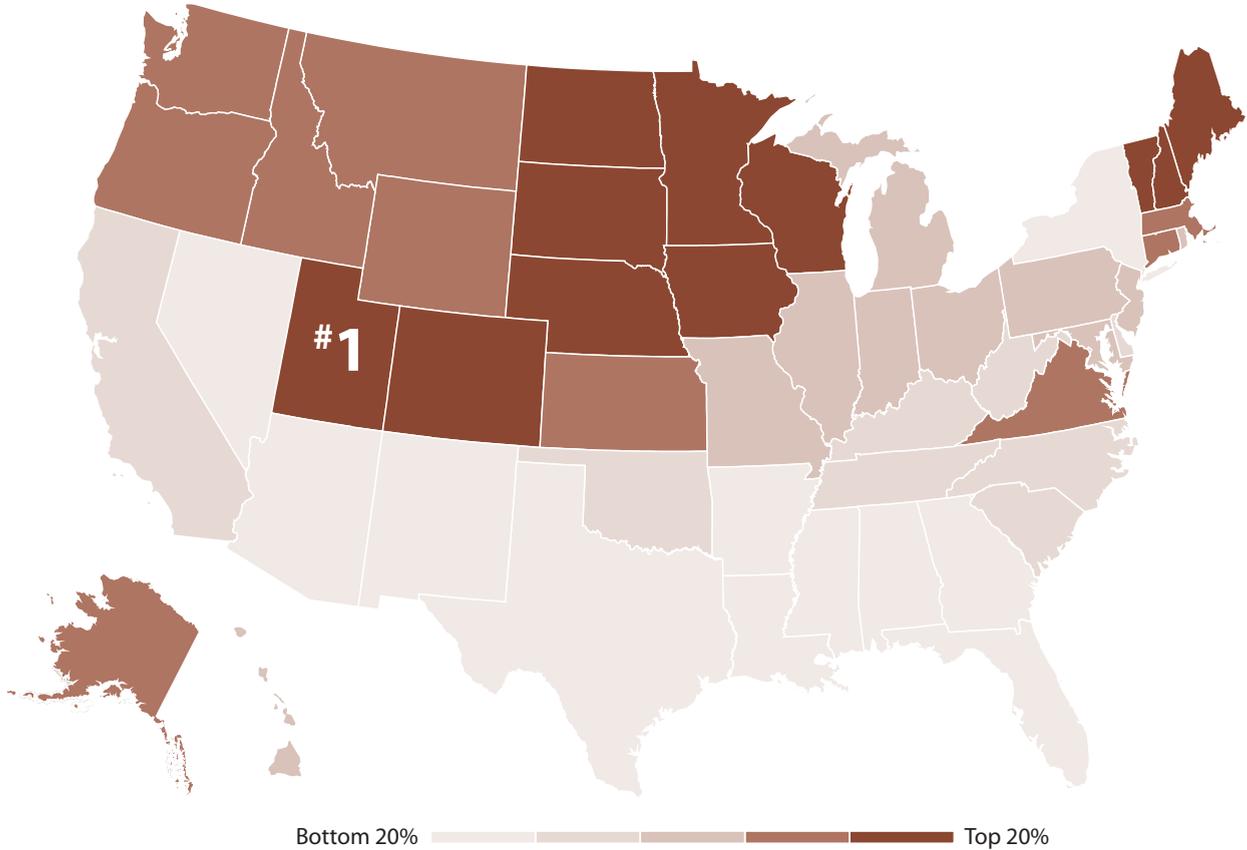
2017–Q3 2020



Source: Kem C. Gardner Policy Institute and Salt Lake Chamber survey of business leaders

Utah's Secret Sauce

State-level social capital index, 2018

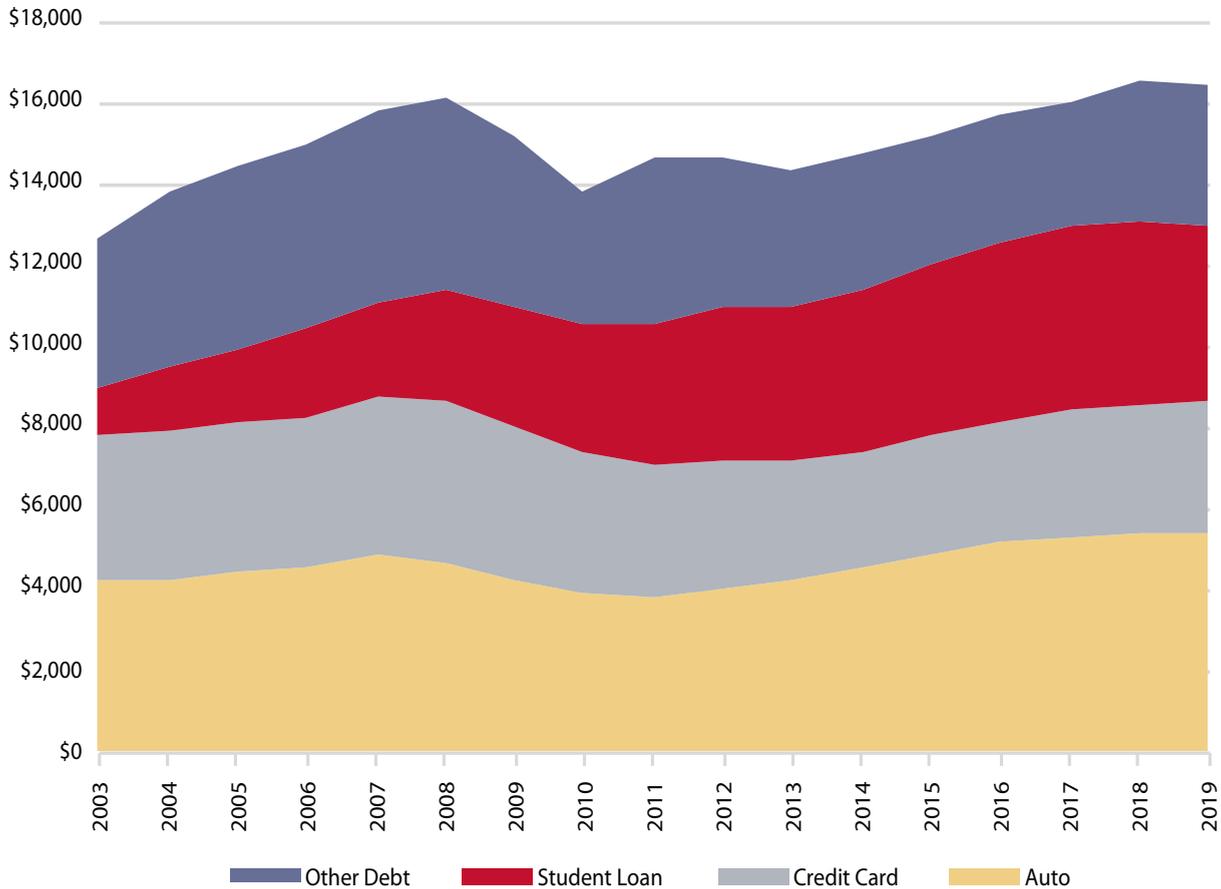


Note: Social capital is defined in this study as the aspects of our relationships that produce benefits for us. Social capital is likely to be “greater” or more productive in families, communities, and organizations with an abundance of close, supportive relationships.
Source: Joint Economic Committee/Social Capital Project.

Drowning in student loans? You're not alone

Utah non-mortgage household debt by type, 2003–2019

Average balance per capita in 2020 dollars

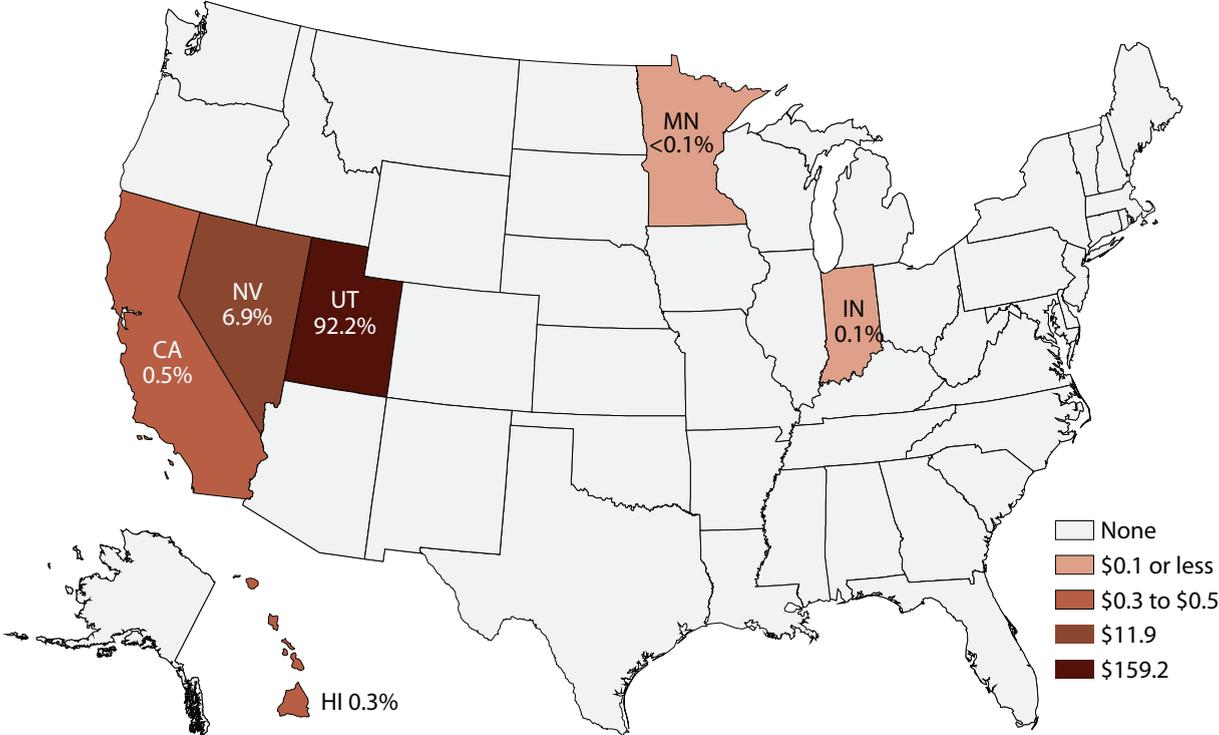


Note: Non-mortgage debt includes home equity loans and lines of credit.
Source: Federal Reserve Bank, New York Fed Consumer Credit Panel, Equifax

This is the Place...for industrial banks

Industrial bank assets, 2020

Share of U.S. industrial bank total and total assets in billions of dollars

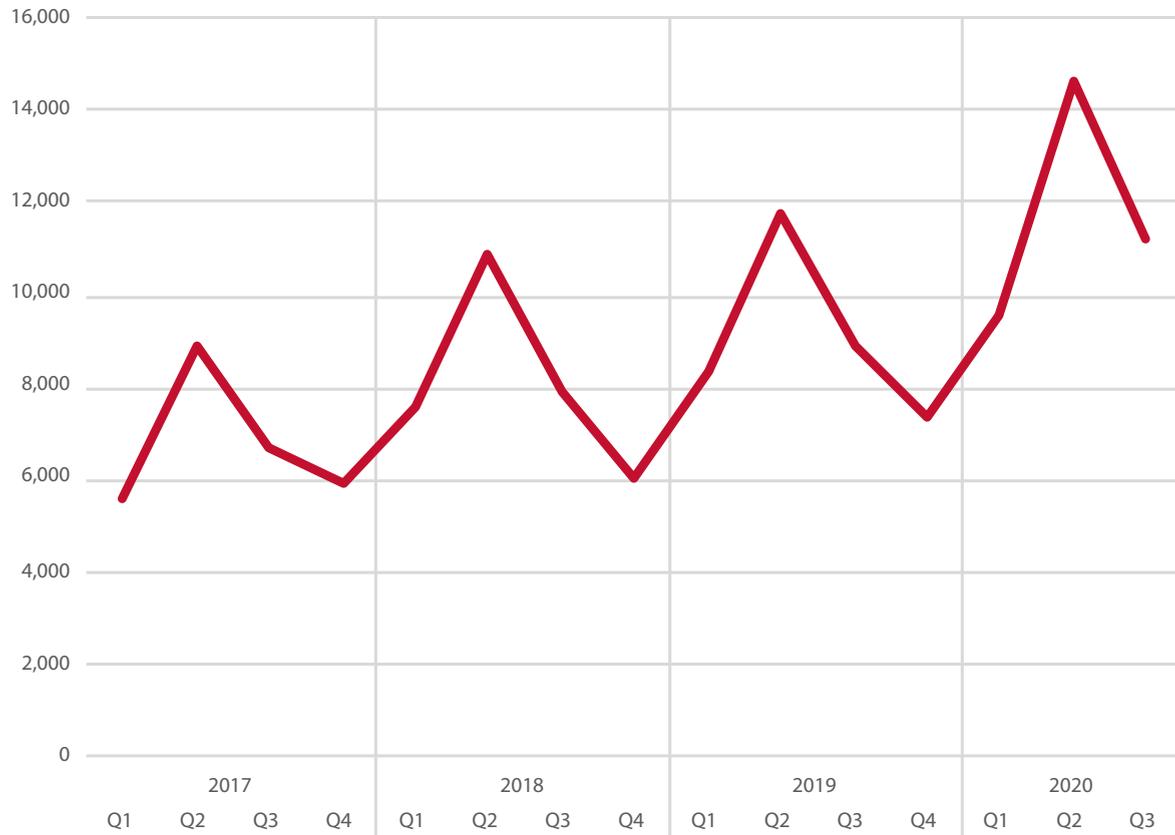


Note: Asset balances as of September 30, 2020 for all 24 industrial banks in the U.S.
Source: Federal Financial Institutions Examination Council

Quarantine on wheels

Utah RV sales

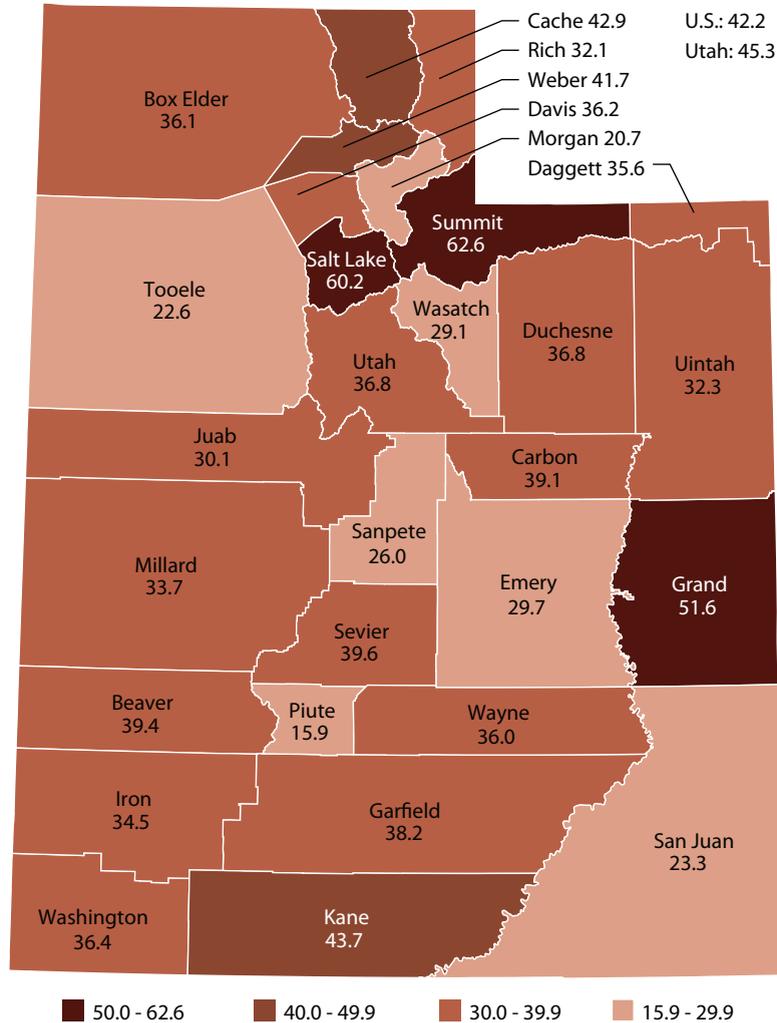
Q4 2019–Q3 2020



Note: RV sales include camper, motor home, trailer - 750lbs or less, trailer - standard, trailer - tent or camper, and trailer - travel new dealer sales
Source: Utah State Tax Commission, New Vehicle Sales

Employment centers

Distribution of jobs and population in Utah, 2020

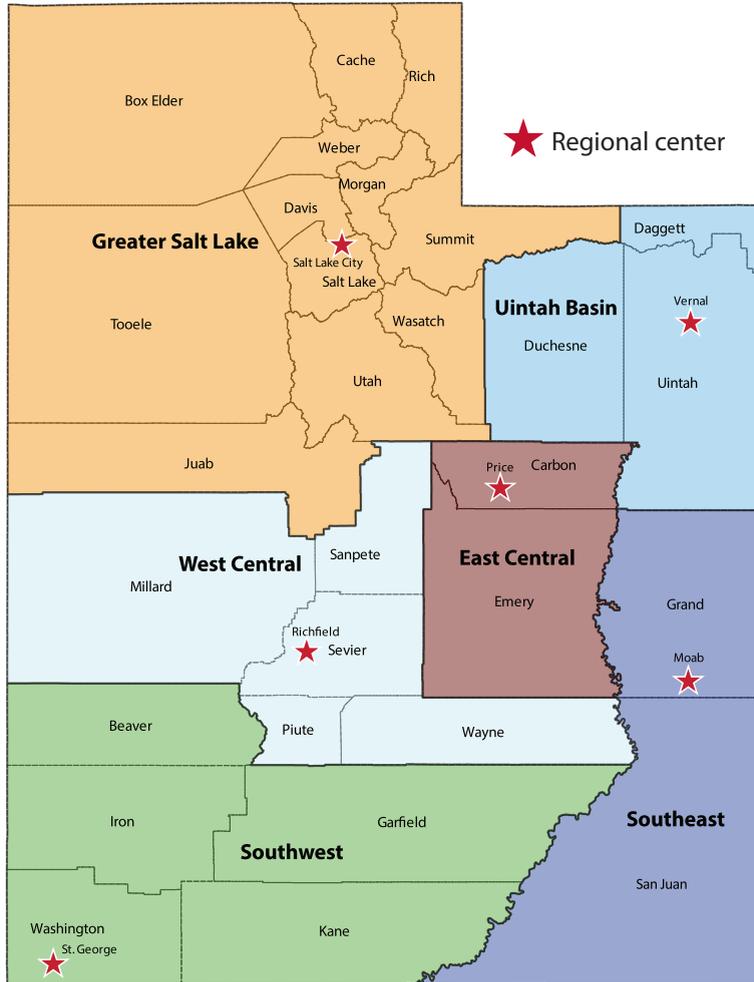


Note: Jobs per 100 population

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

All economics is regional

Utah's economic regions

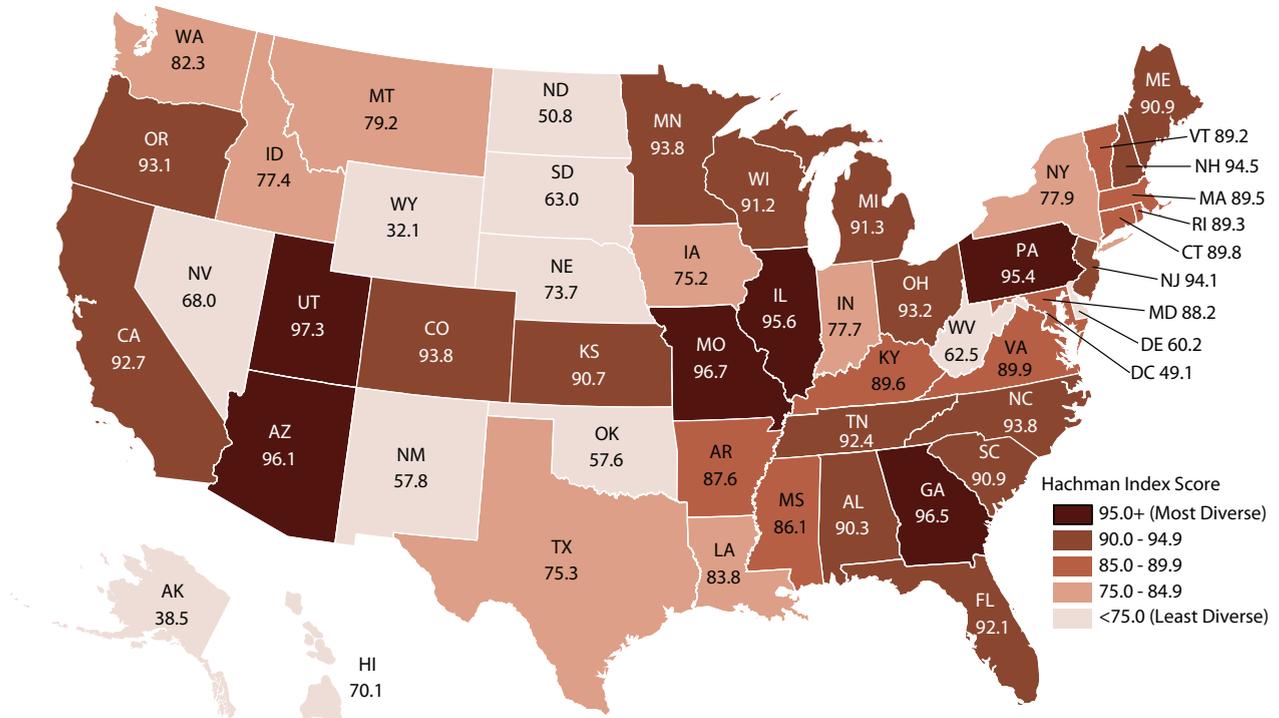


Source: Kem C. Gardner Policy Institute

Utah leads in economic diversity

State-level Hachman Index, 2019

Based on two-digit industry GDP data

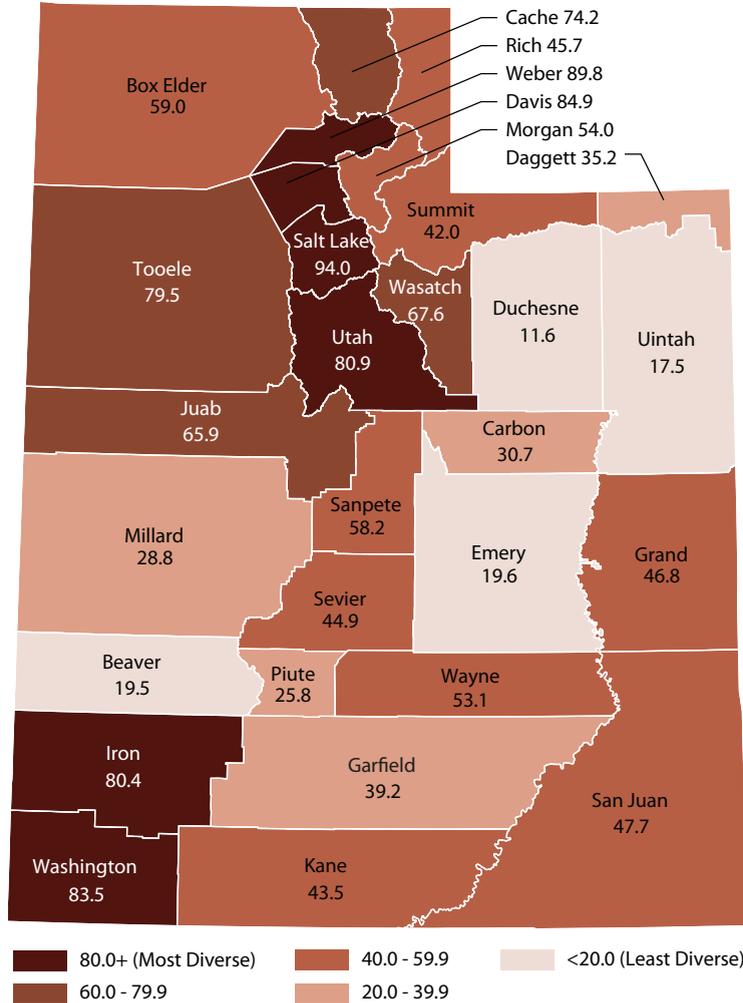


Source: Kem C. Gardner Policy Institute

Salt Lake County leads in economic diversity

County-level Hachman Index, 2019

Based on two-digit industry employment data

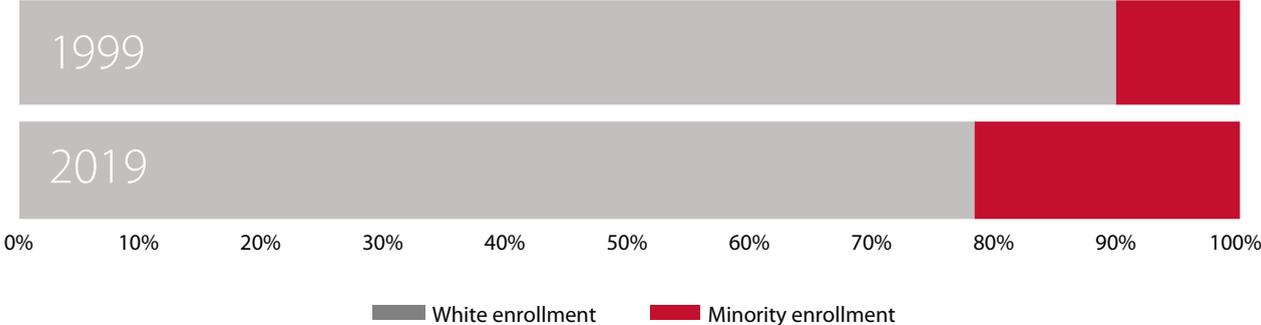


Source: Kem C. Gardner Policy Institute

Growth in equity, diversity, and inclusion

Utah's universities total headcount by race/ethnicity

1999 compared to 2019



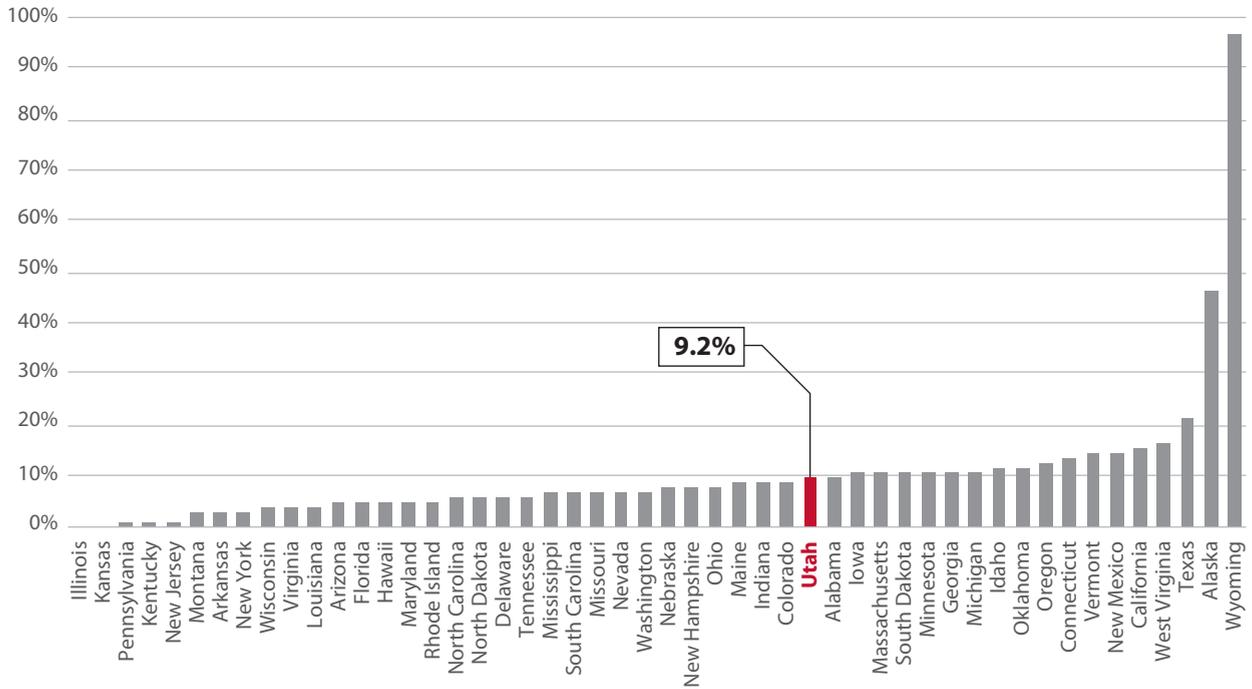
Note: Excludes non-resident students and students whose race was not reported
Source: Utah System of Higher Education

“DEEP TRANSFORMATIONAL
CHANGE AROUND DIVERSITY, EQUITY,
INCLUSION, AND BELONGING CAN'T JUST
BE TRANSACTIONAL. IT HAS TO BE
RELATIONAL.”

- Aiko Bethea

Saving for a rainy day

Rainy day fund balances as a percent of general fund expenditures, 2019



QAMO

STUDENT SUBMISSION

Submitted by David Eccles School of Business
Quantitative Analysis of Markets & Organizations
(QAMO) student Sophia Bagley

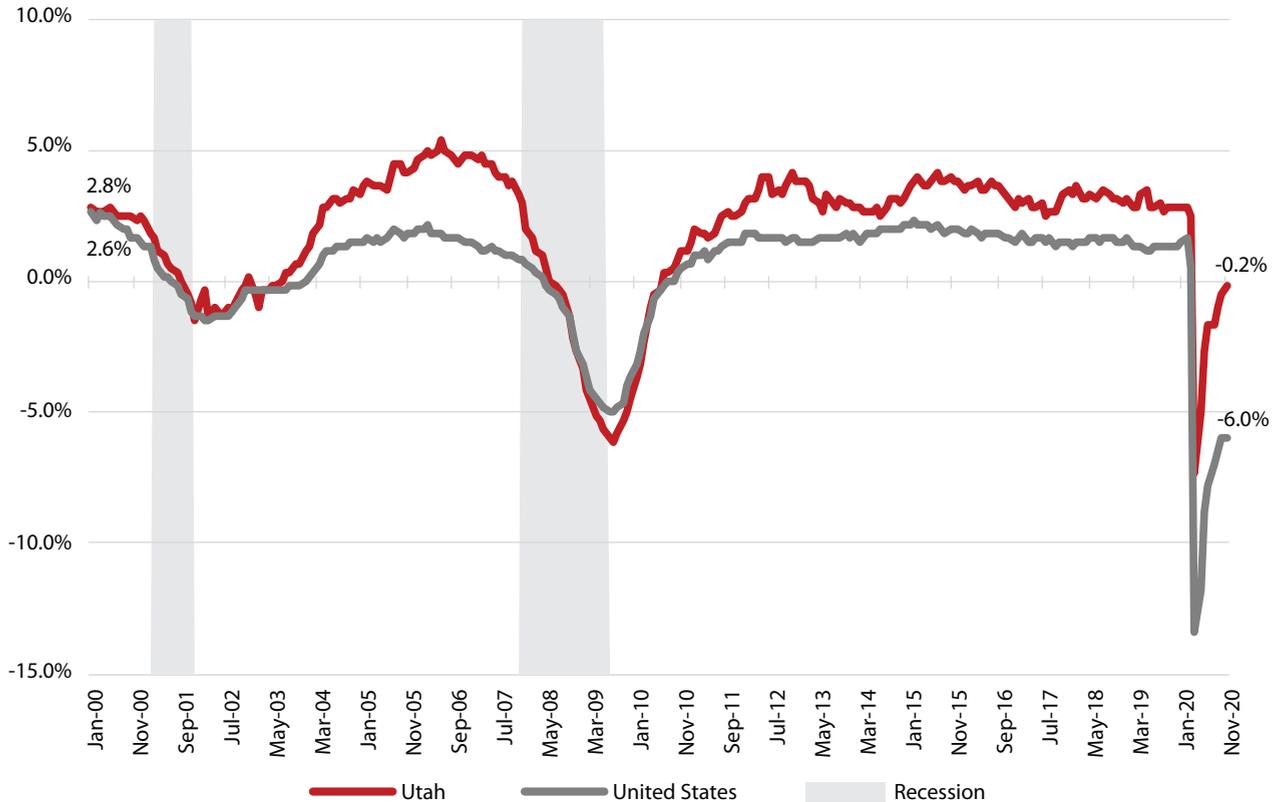


Source: National Association of State Budget Officers, Fall 2019 Fiscal Survey

Recession*

Year-over change in nonfarm employment

January 2000–October 2020



*The 2020 COVID-19 recession has not yet been defined by the National Bureau of Economic Research (NBER) Business Cycle Dating Committee.

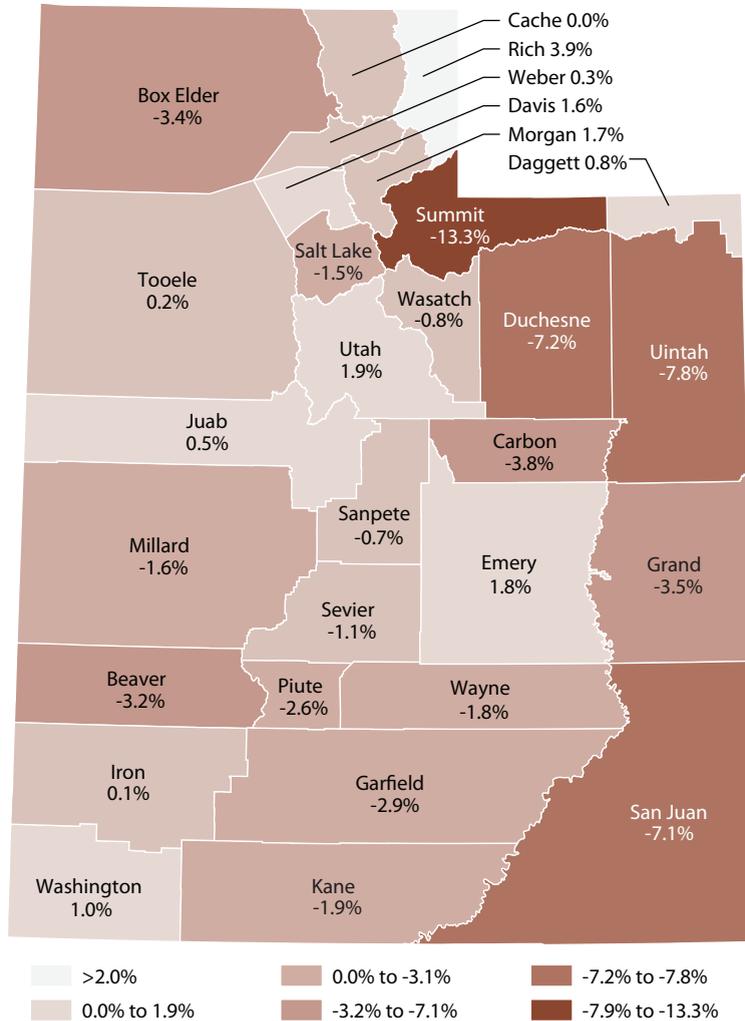
Note: Not seasonally adjusted

Source: U.S. Bureau of Labor Statistics

Eastern Utah hard hit

Year-over change in nonfarm employment in Utah's counties

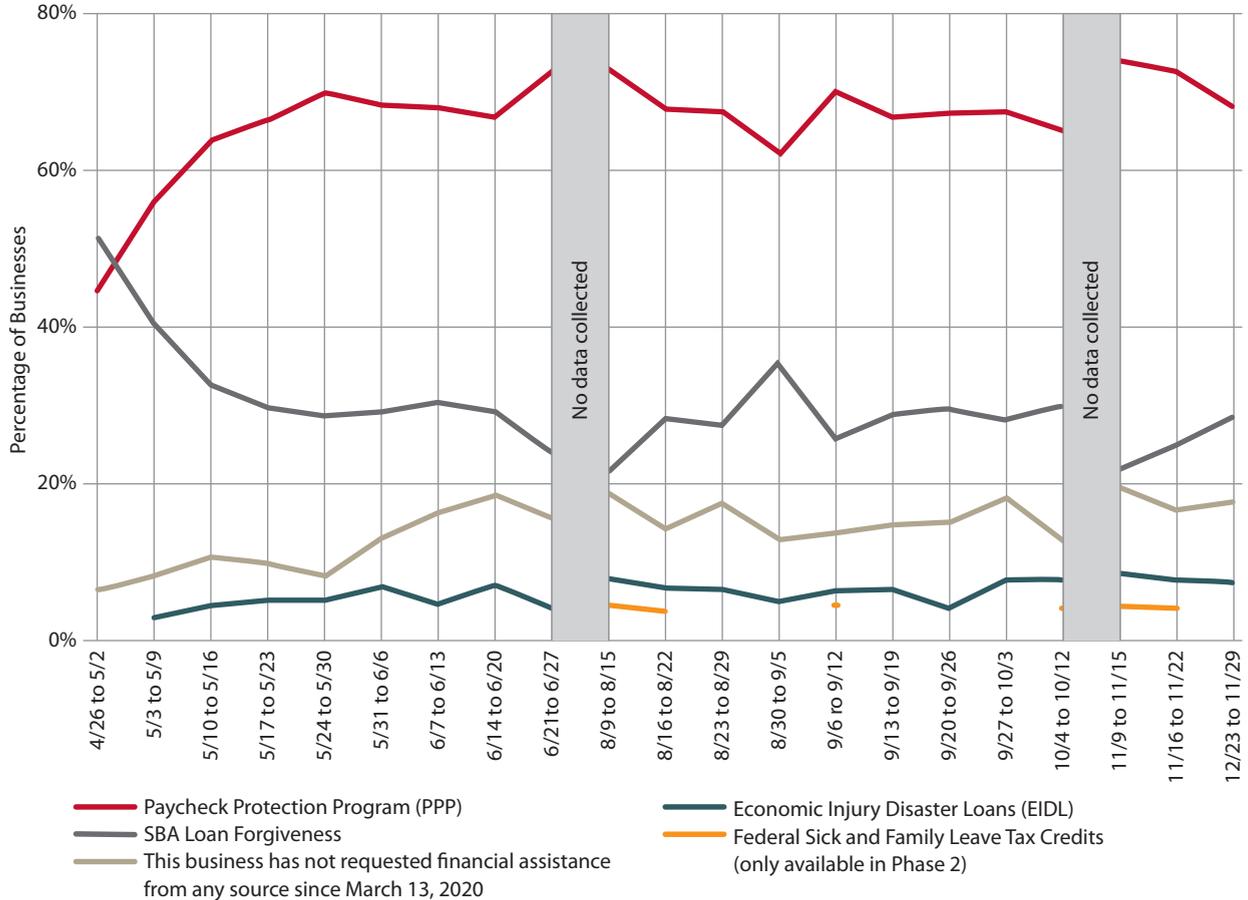
November 2019–November 2020



Source: Utah Department of Workforce Services

Utah small business life preservers

Federal financial assistance to Utah businesses during the pandemic

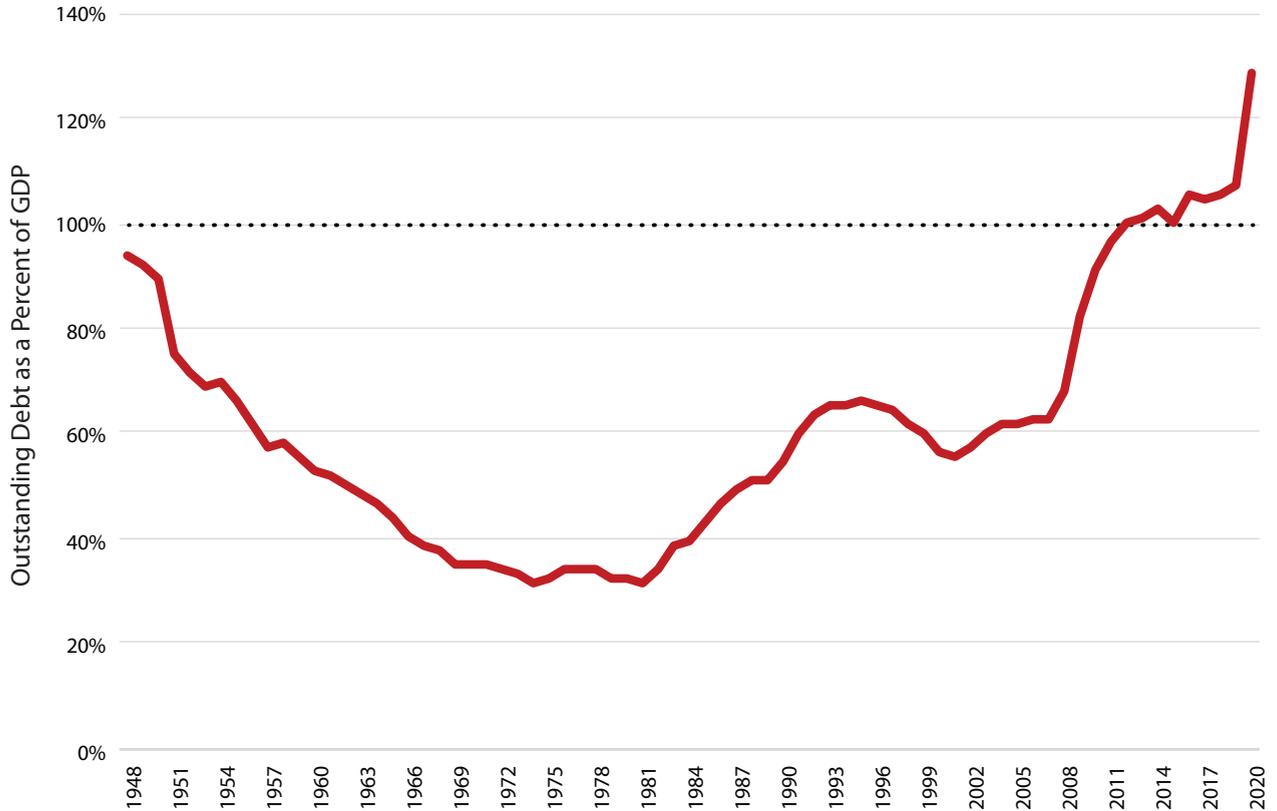


Sources: U.S. Census Bureau, Small Business Pulse Survey

Termites in the woodwork

U.S. debt-to-GDP ratio, 1948–2020

Federal fiscal years

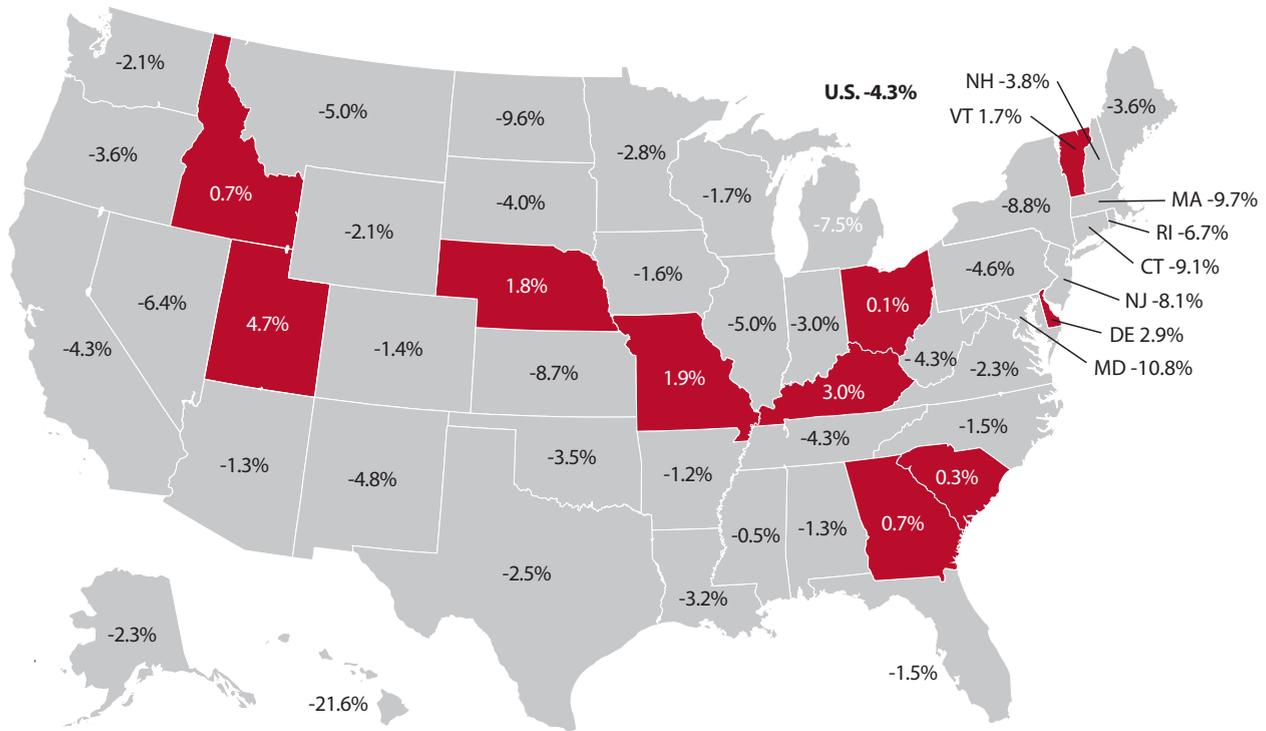


Source: U.S. Treasury; U.S. Bureau of Economic Analysis

Utah economy fares better during COVID-19 recession

State coincident indexes

Percent change March–November 2020

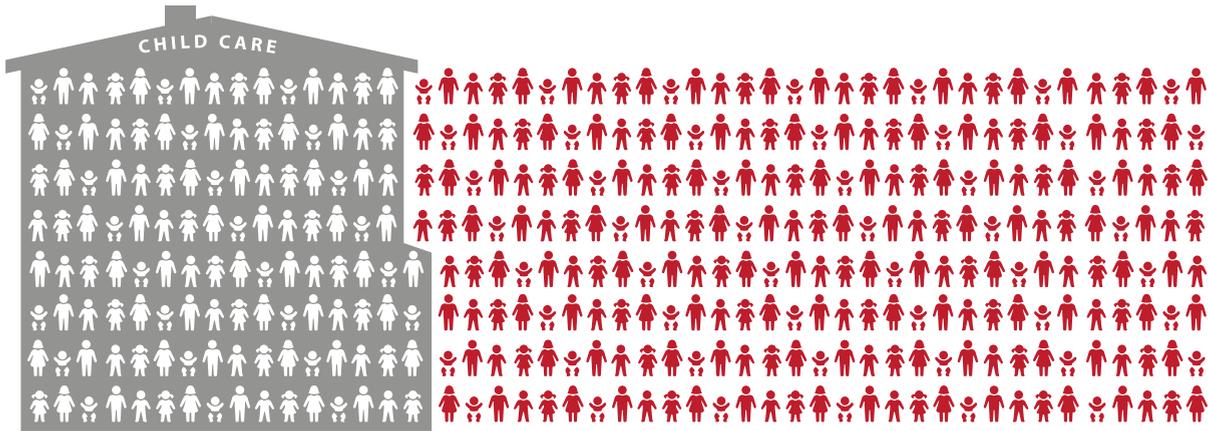


Note: The Coincident Economic Activity Index combines nonfarm payroll employment, average hours worked in manufacturing, the unemployment rate, and real wage and salary disbursements.
Source: Federal Reserve Bank of Philadelphia

Mother may I?

Child care need and gaps in Utah before COVID-19

153,950 children
have the potential need for child care



55,460
available slots

The families of **98,750** children
do not have access to child care

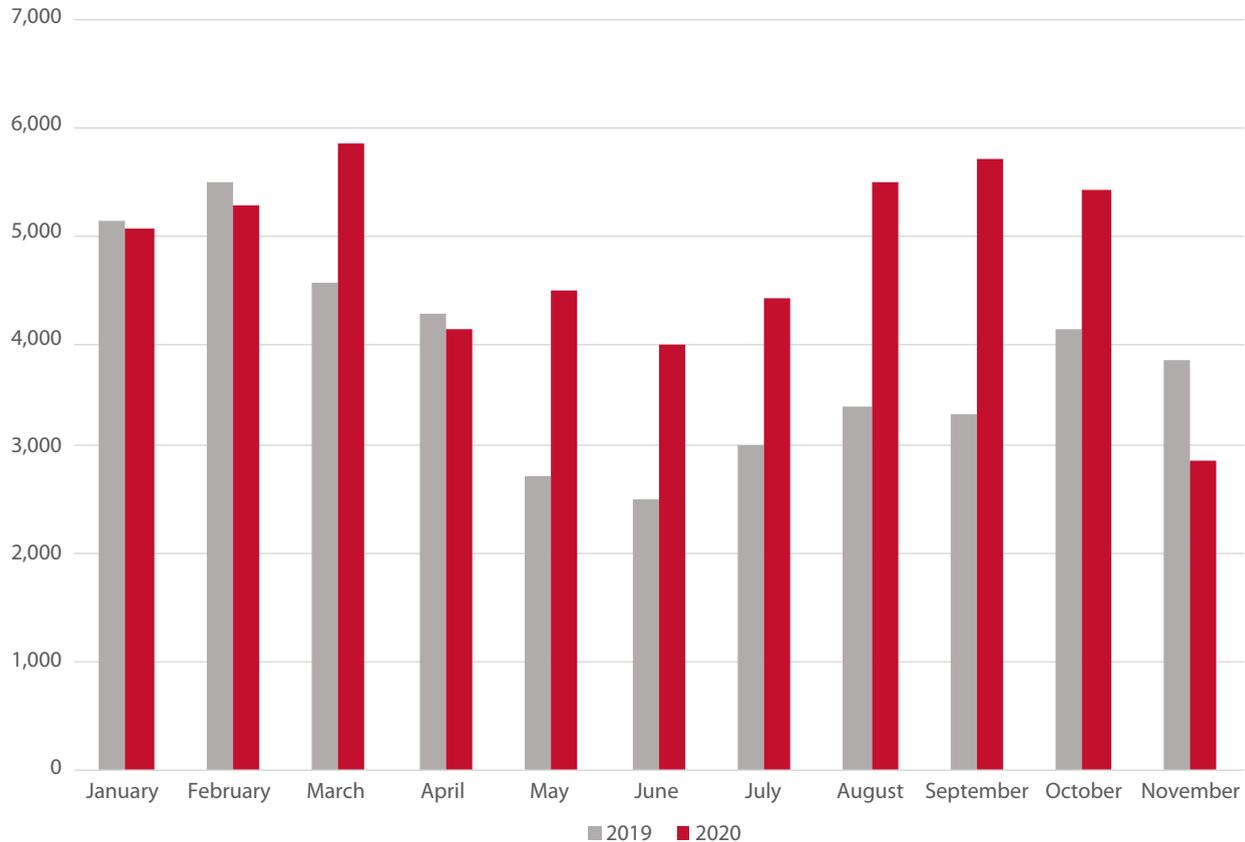
Child care gap: **64.1%** of the potential need

Source: Bipartisan Policy Center in partnership with the Utah Department of Workforce Services Office of Child Care

Utahns needing help

United Way of Salt Lake 211 calls

2019 compared to 2020

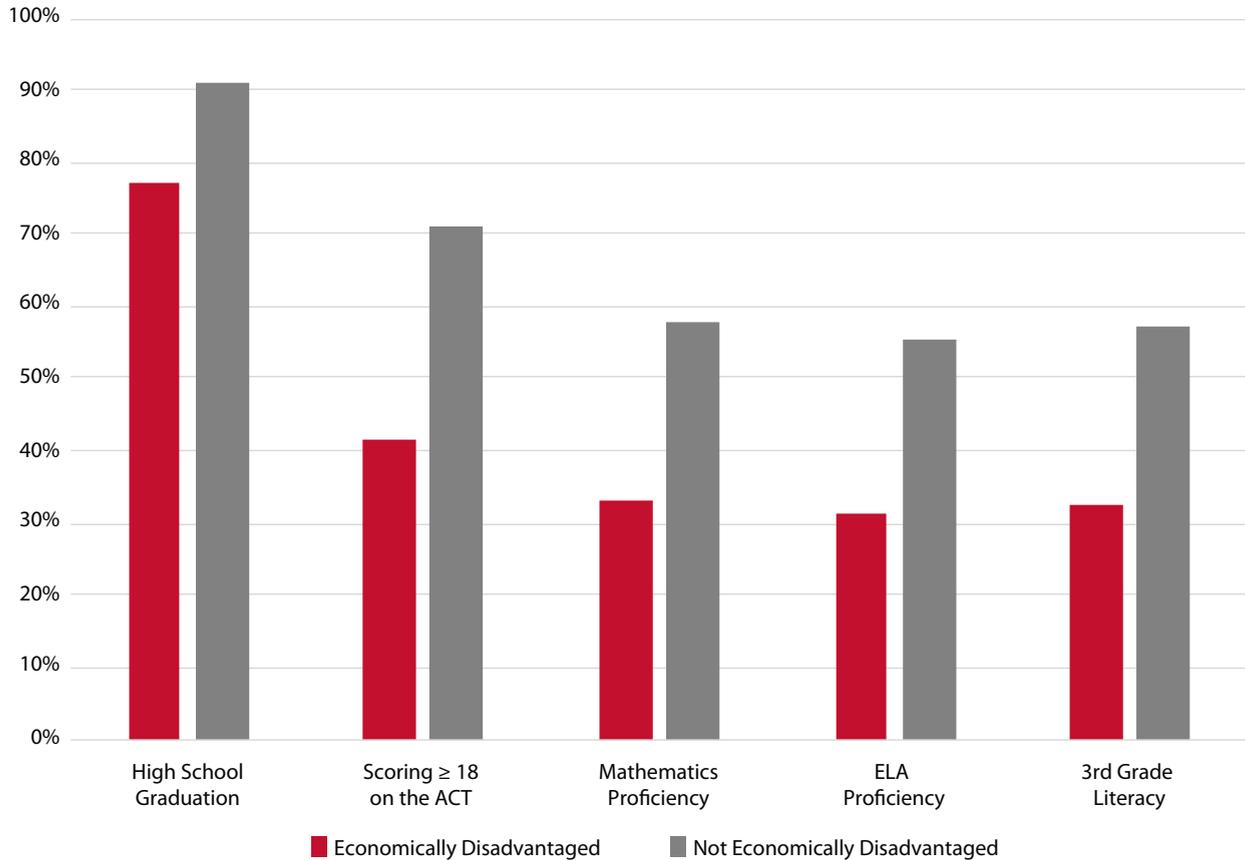


Note: 211 is a free information helpline that connects people of all ages and from all communities to the essential health and human services they need, 24 hours a day, seven days a week.

Source: United Way of Salt Lake

The need for student-centered funding

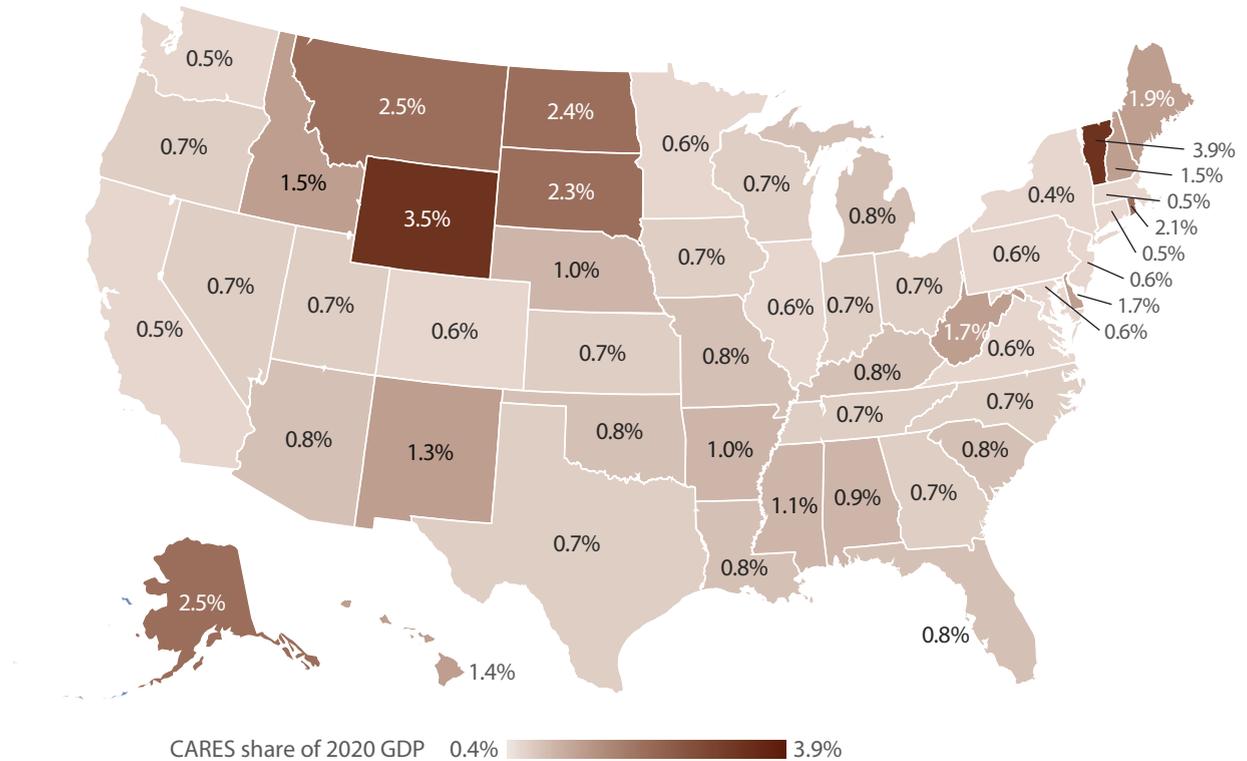
Utah student outcomes based on economic status, 2018



Note: "Economically disadvantaged" refers to a child experiencing intergenerational poverty, living in a family with an annual income at or below 185% of the federal poverty level, or living with a legal custodian or legal guardian who can attest that the child or the child's household is receiving services benefitting low-income households or individuals, as defined in Utah Code 53B-8a-201.
Source: Utah State Board of Education

Who CARES? Utah does

CARES Act allocations by state as a share of estimated 2020 GDP

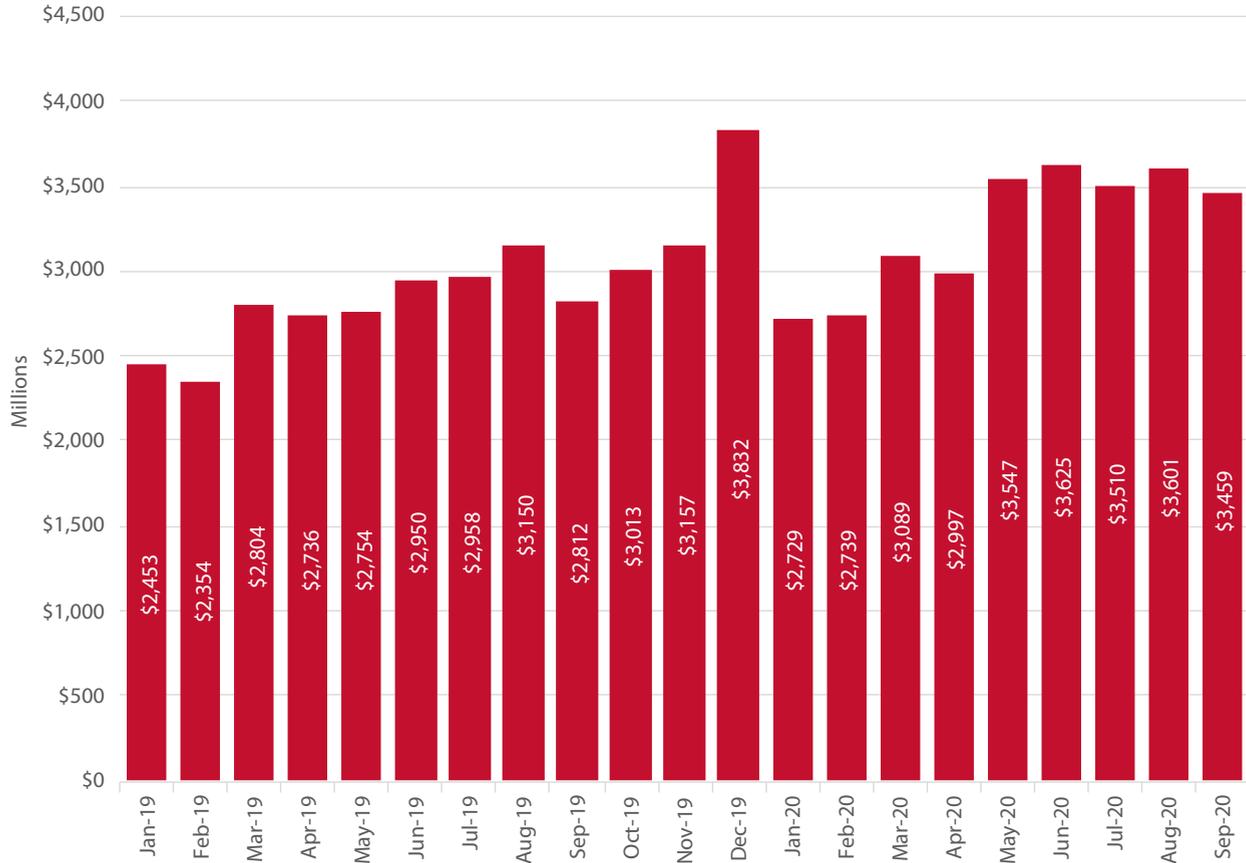


Source: Department of the Treasury Office of Inspector General (OIG)

All the small things add up

Utah taxable retail sales

January 2019–September 2020

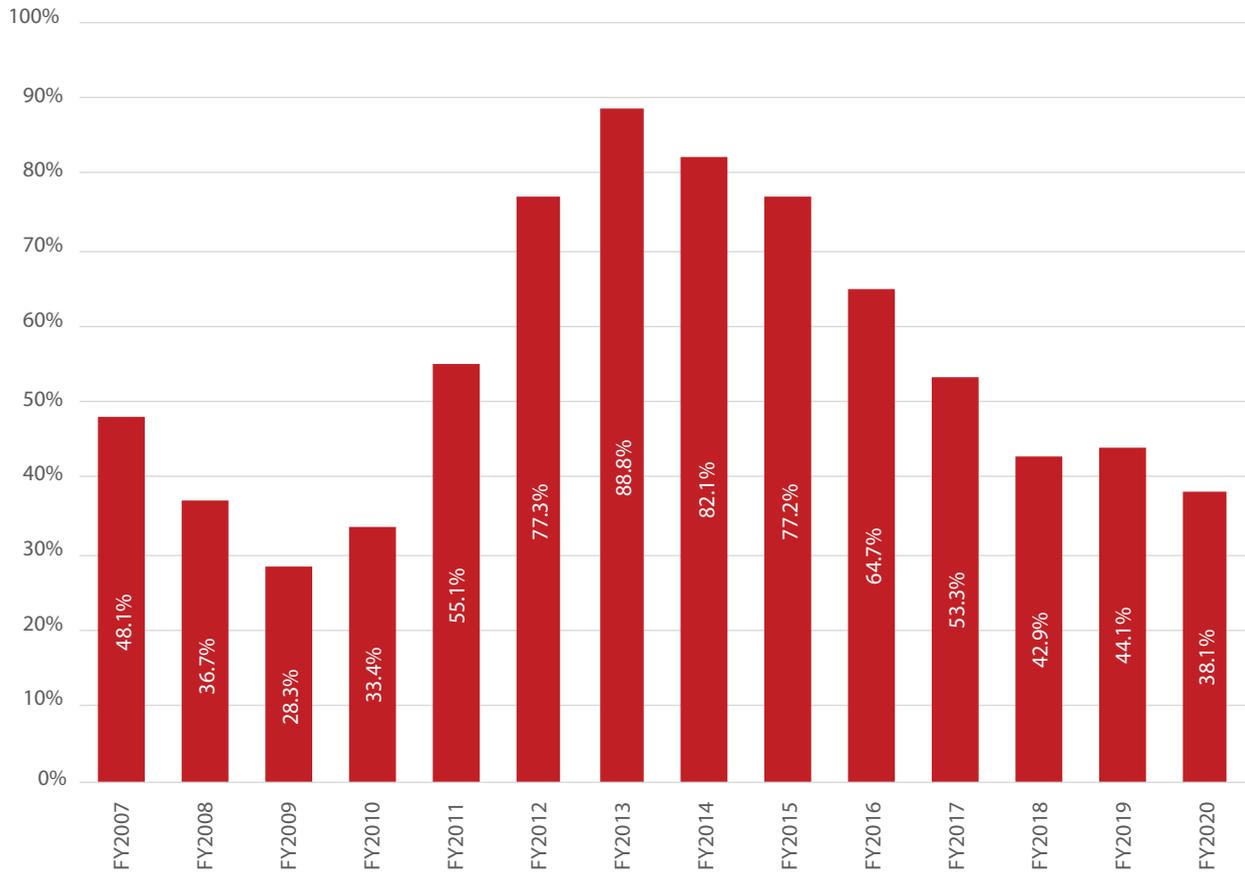


Source: Utah State Tax Commission

Fiscal responsibility

Utah general obligation debt relative to constitutional debt limit

FY2007–FY2020

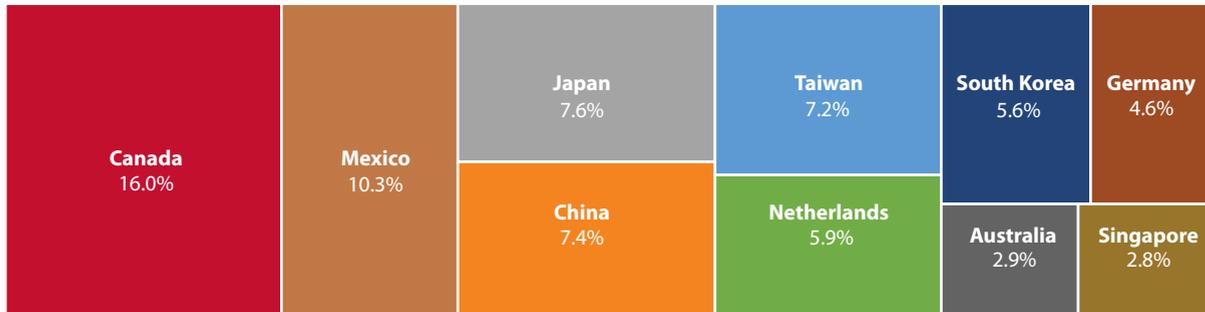


Source: Utah Division of Finance

Utah's global mix

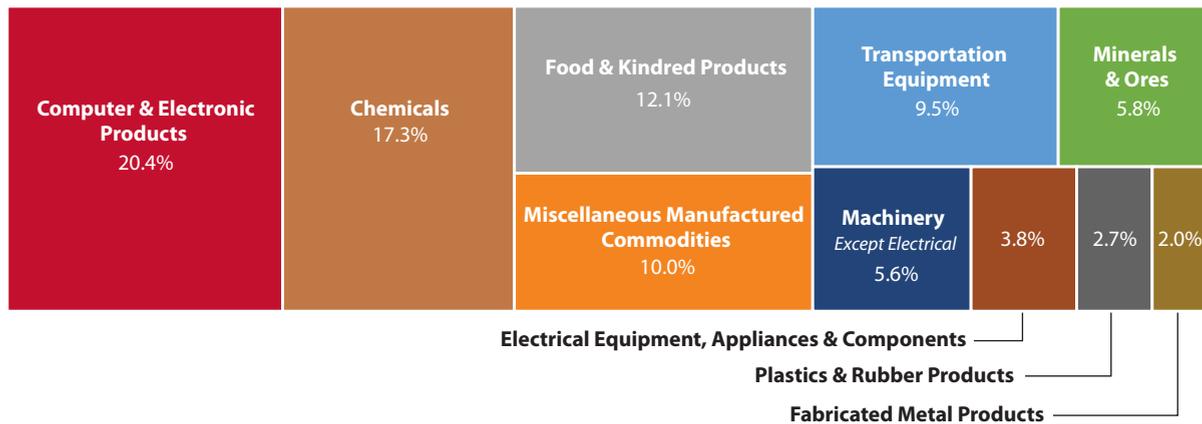
Utah's top 10 trading partners, 2020

Percent of total value excluding gold



Utah's top 10 exports, 2020

Percent of total value excluding gold



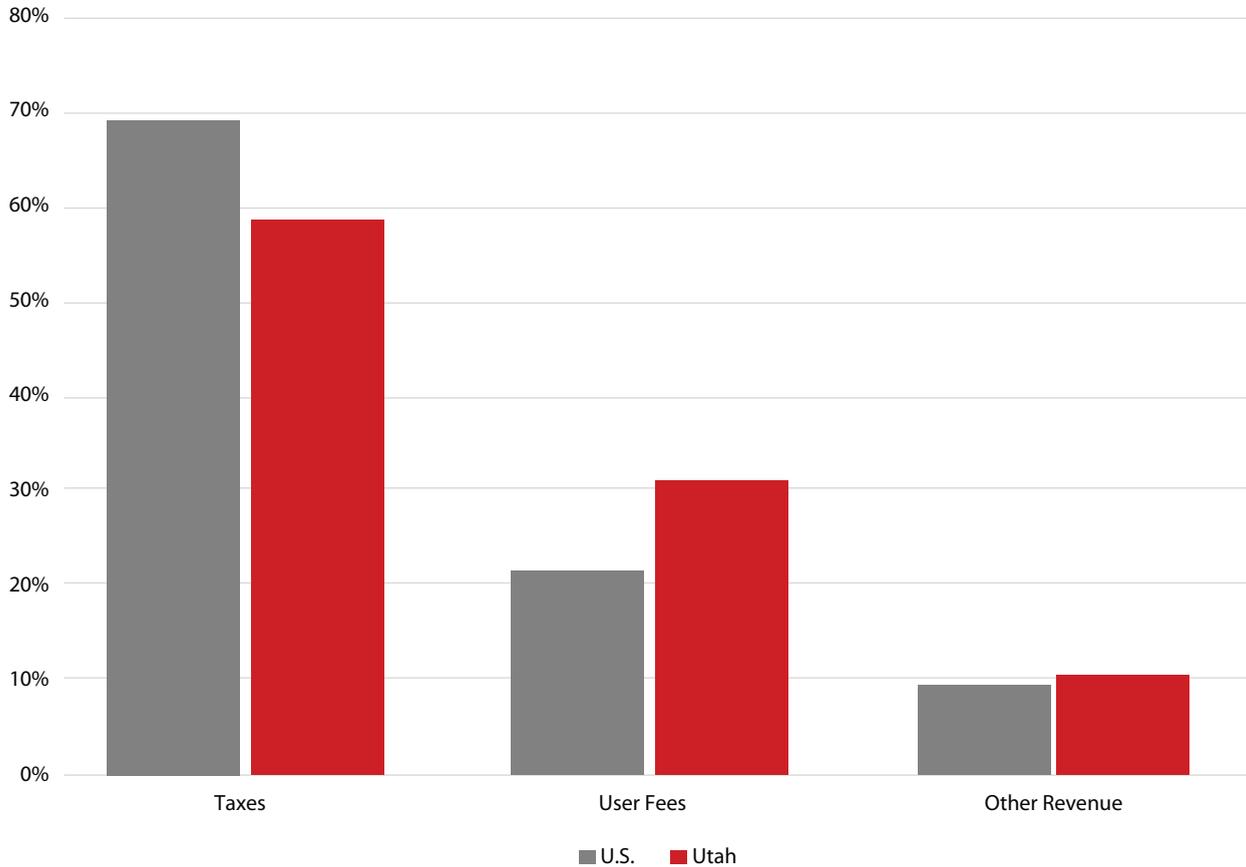
Note: Data through October 2020. Gold accounted for 50% of Utah's exports through October of 2020;

98% of gold exports went to the United Kingdom during this time.

Source: USA Trade Online

Does it walk like a duck?

U.S. and Utah revenue sources, 2018

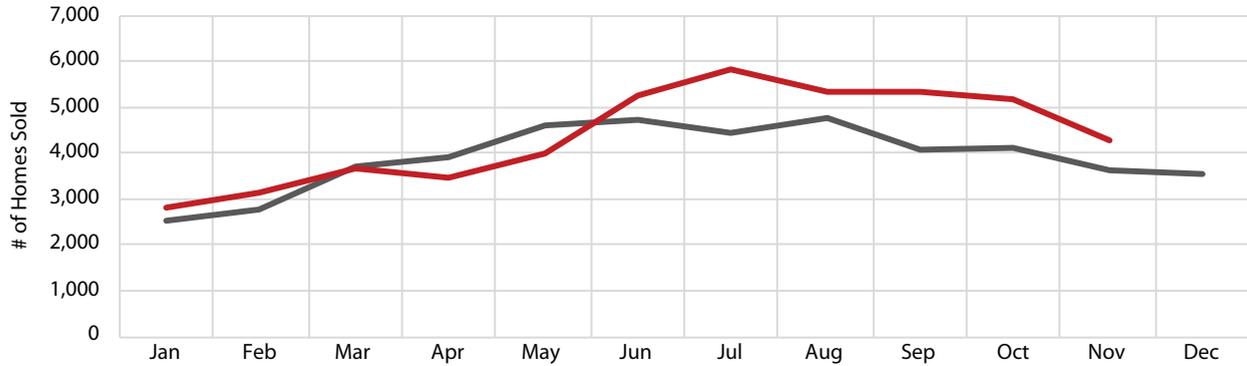


Source: U.S. Census Bureau Annual Survey of State and Local Government Finances

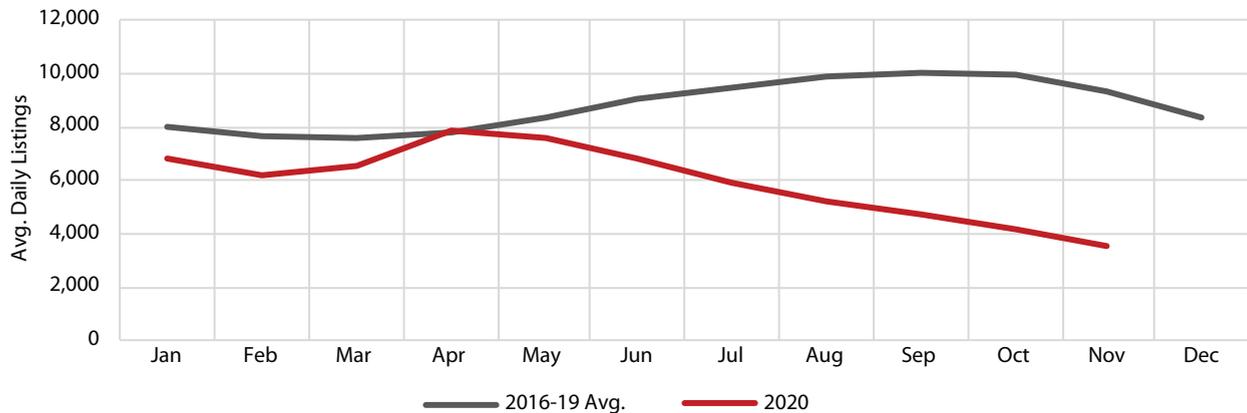
A sellers' market in the Beehive State

Home sales and listings in Utah

Homes sold



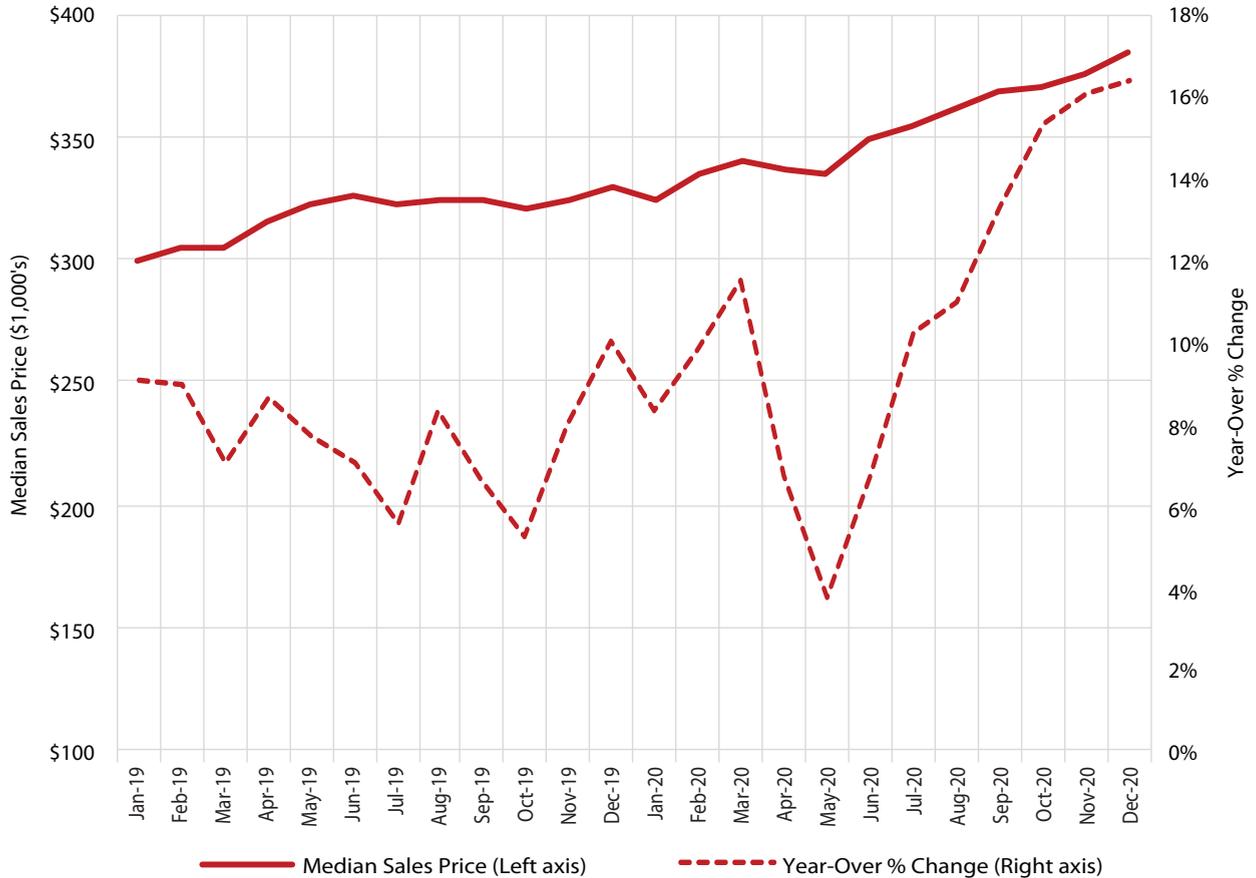
Active listings



Source: UtahRealEstate.com

Up, up, up they go...where they stop, no-one knows!

Home price growth in Utah, 2019–2020



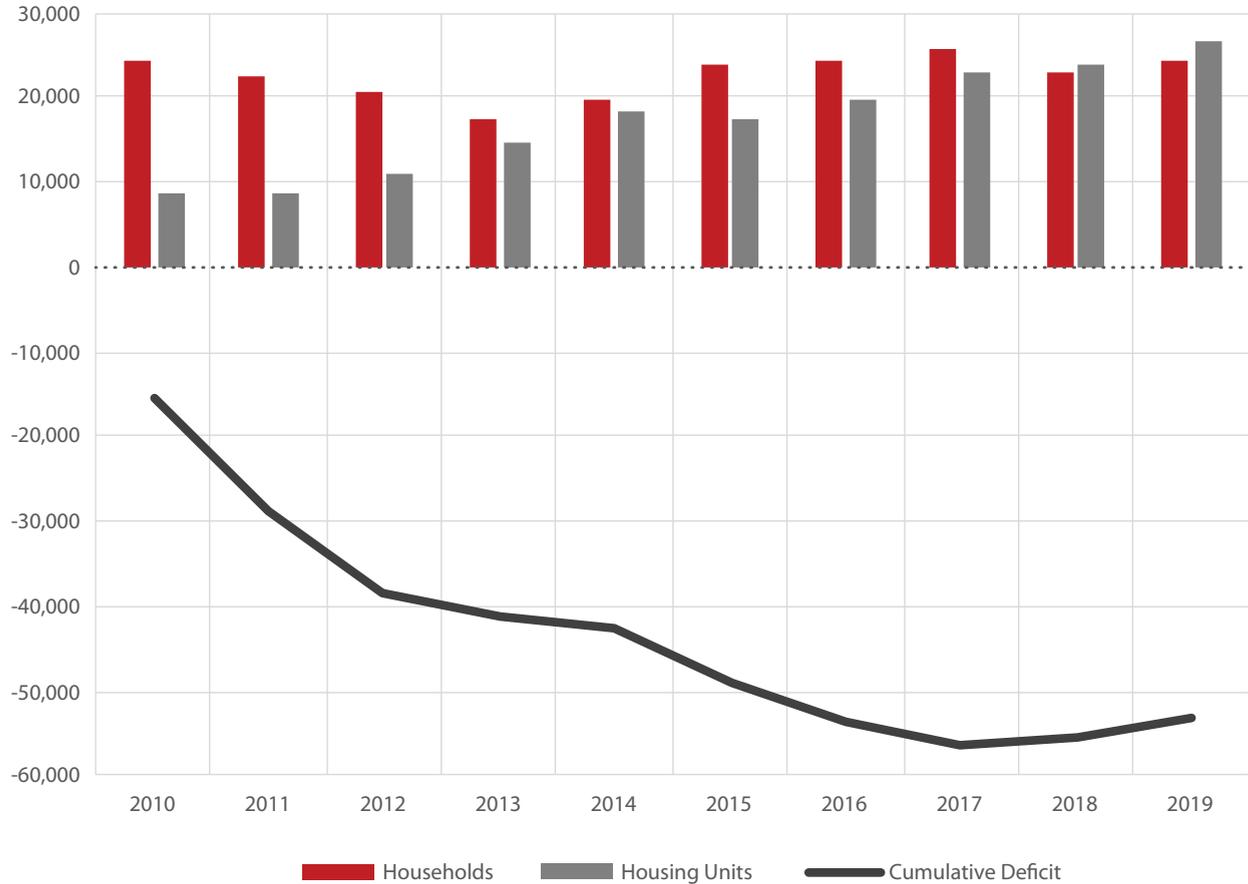
Source: UtahRealEstate.com

“FOR TWO DECADES A
RELIABLY EASY WAY TO
MAKE MONEY
HAS BEEN TO BUY A COMMERCIAL BUILDING
AND **GO TO SLEEP...**
BUT NOW THE **VIRUS** HAS
THROWN THAT ASSUMPTION
INTO A **CEMENT MIXER.**”

– Adapted from The Economist, June 27, 2020

The housing shortage is real

Annual increase in households and housing units in Utah/cumulative shortage, 2010–2019



Source: Kem C. Gardner Policy Institute

A hot housing market

Change in FHFA state-level house price index

Seasonally adjusted, purchase-only index, 2015 Q3–2020 Q3



Source: FHFA

From coast to coast

Top 25 metro areas ranked by median sales price of single-family homes

Q1 2020



Area	Price	Year-over % Change
Salem, OR	\$331,400	13.4%
Colorado Springs, CO	\$339,100	14.4%
Austin-Round Rock, TX	\$341,500	12.6%
Salt Lake City, UT	\$372,100	12.3%
Miami-Fort Lauderdale-West Palm Beach, FL	\$375,000	7.1%
Newark, NJ-PA	\$388,000	7.9%
Sacramento-Roseville-Arden Arcade, CA	\$392,300	9.0%
Riverside-San Bernardino-Ontario, CA	\$393,000	7.7%
Reno, NV	\$407,600	7.7%
Portland-Vancouver-Hillsboro, OR-WA	\$416,100	6.5%
New York-Newark-Jersey City, NY-NJ	\$420,300	6.0%
Barnstable Town, MA	\$426,600	4.7%
Bridgeport-Stamford-Norwalk, CT	\$432,100	7.7%

Area	Price	Year-over % Change
Washington-Arlington-Alexandria, DC-VA-MD-WV	\$438,900	4.5%
Denver-Aurora, CO	\$473,800	6.1%
Naples-Immokalee-Marco Island, FL	\$480,000	11.9%
Nassau County-Suffolk County, NY	\$487,700	2.8%
Boston-Cambridge-Newton, MA	\$494,400	7.2%
Seattle-Tacoma-Bellevue, WA	\$554,500	11.5%
Los Angeles-Long Beach-Glendale, CA	\$592,800	8.1%
San Diego-Carlsbad, CA	\$670,000	8.1%
Honolulu, HI	\$788,800	-0.7%
Anaheim-Santa Anna-Irvine, CA	\$875,000	9.4%
San Francisco-Oakland-Hayward, CA	\$985,000	5.9%
San Jose-Sunnyvale-Santa Clara, CA	\$1,350,000	10.7%

Source: National Association of Realtors

NOT a renter's market

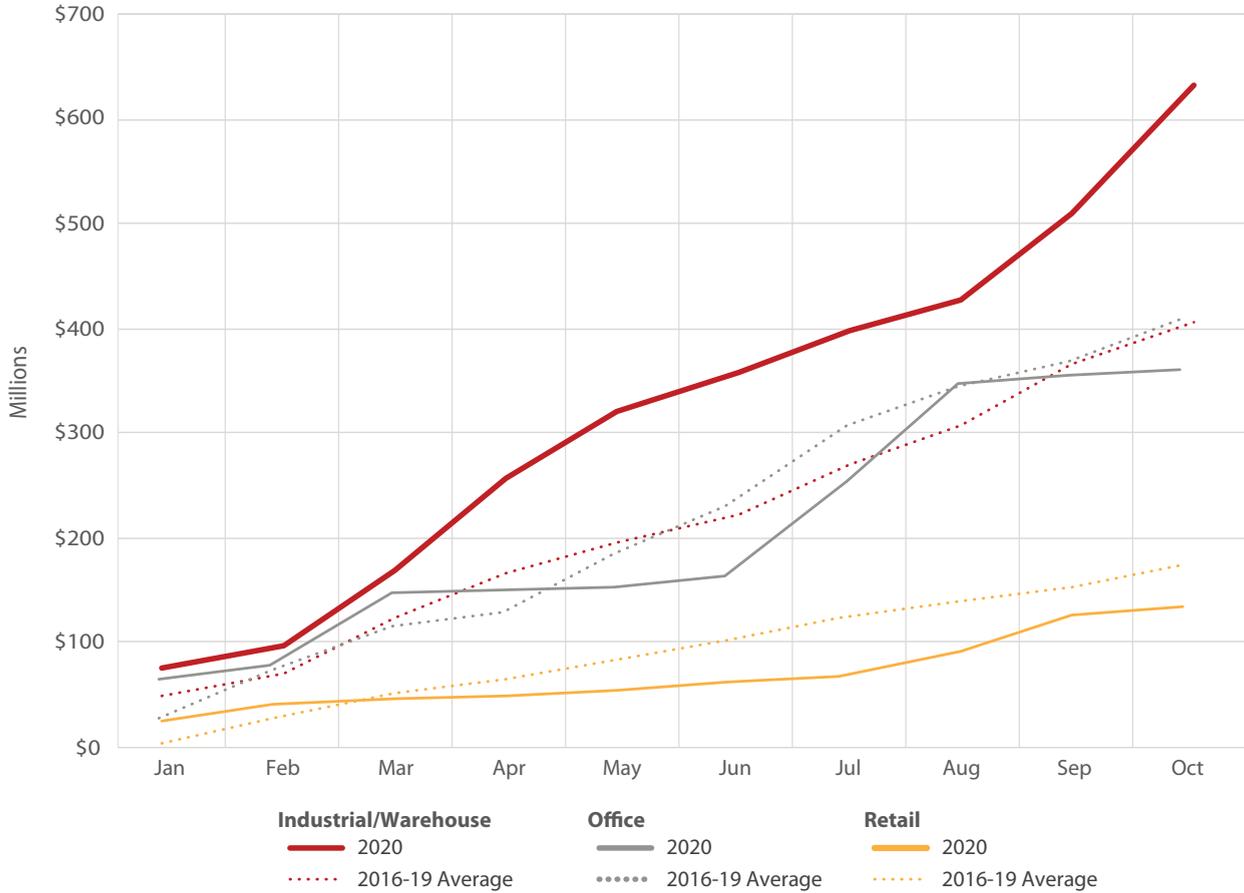
Gap of affordable and available rental units for renters at 0–50% of area median income in Utah

Year	Renter Households at ≤50%	Available and Affordable	Affordability Gap
2010	111,251	70,199	41,052
2011	113,717	78,010	35,707
2012	114,283	68,570	45,713
2013	116,299	69,012	47,287
2014	118,947	71,844	47,103
2015	121,701	77,037	44,664
2016	119,230	74,161	45,069
2017	123,432	75,417	48,015
2018	123,861	74,317	49,545
AARC	1.35%	0.72%	2.38%

Source: HUD CHAS, 2010–2015, and Kem C. Gardner Policy Institute, 2016–2018

Crossroads of the West

Cumulative permitted commercial construction

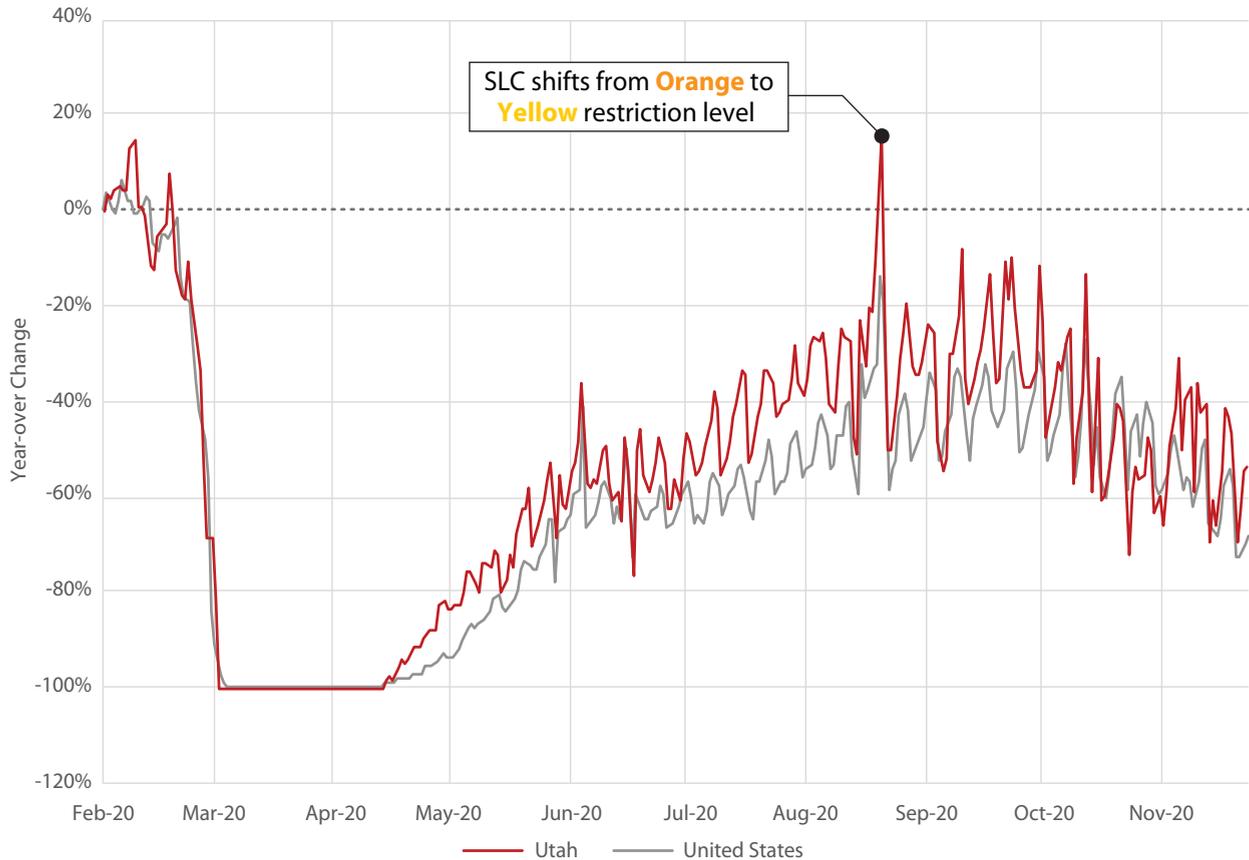


Source: Kem C. Gardner Policy Institute

May I take your order?

Year-over seated diners in U.S. and Utah

Online reservations, phone reservations, and walk-ins

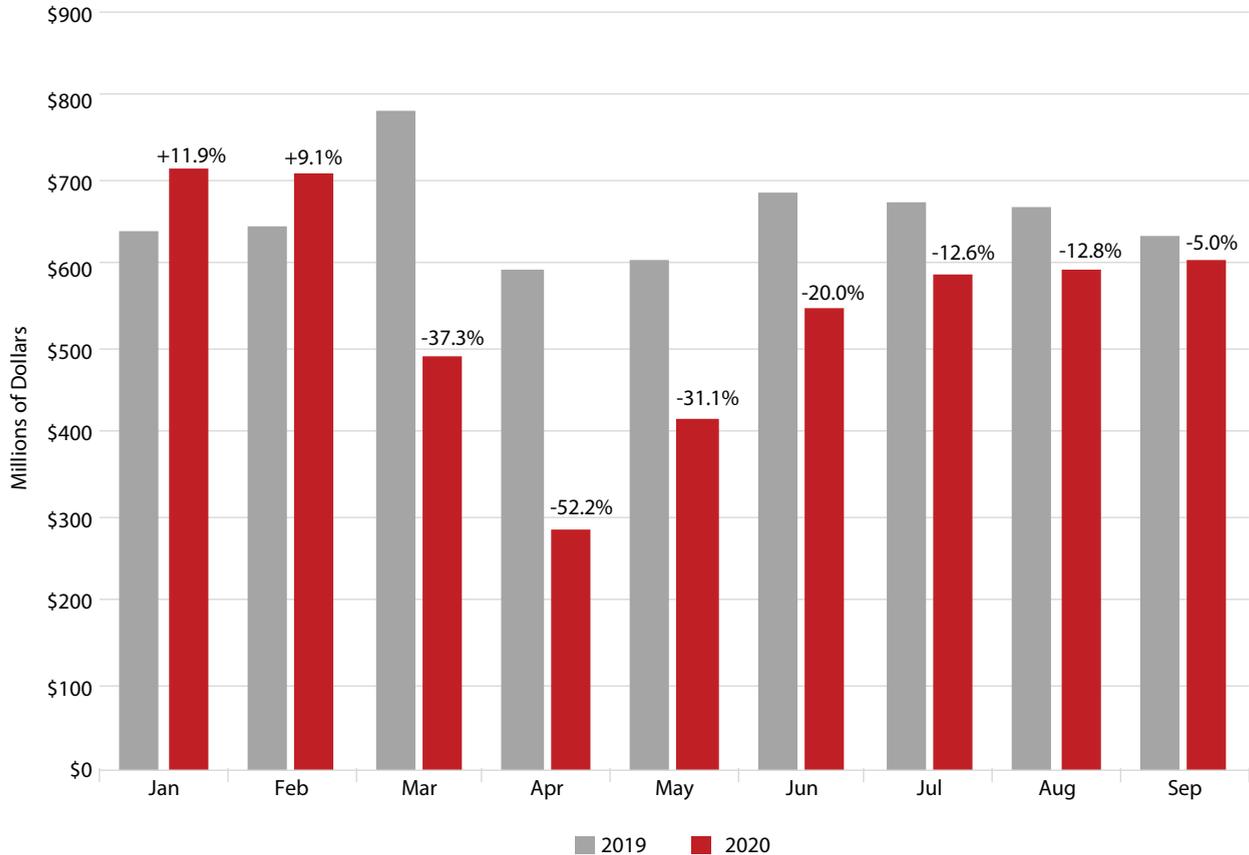


Note: From a sample of restaurants on the OpenTable network
Source: OpenTable.com

Tourism struggling

Leisure and hospitality taxable sales, 2019–2020

Total sales and change from prior year

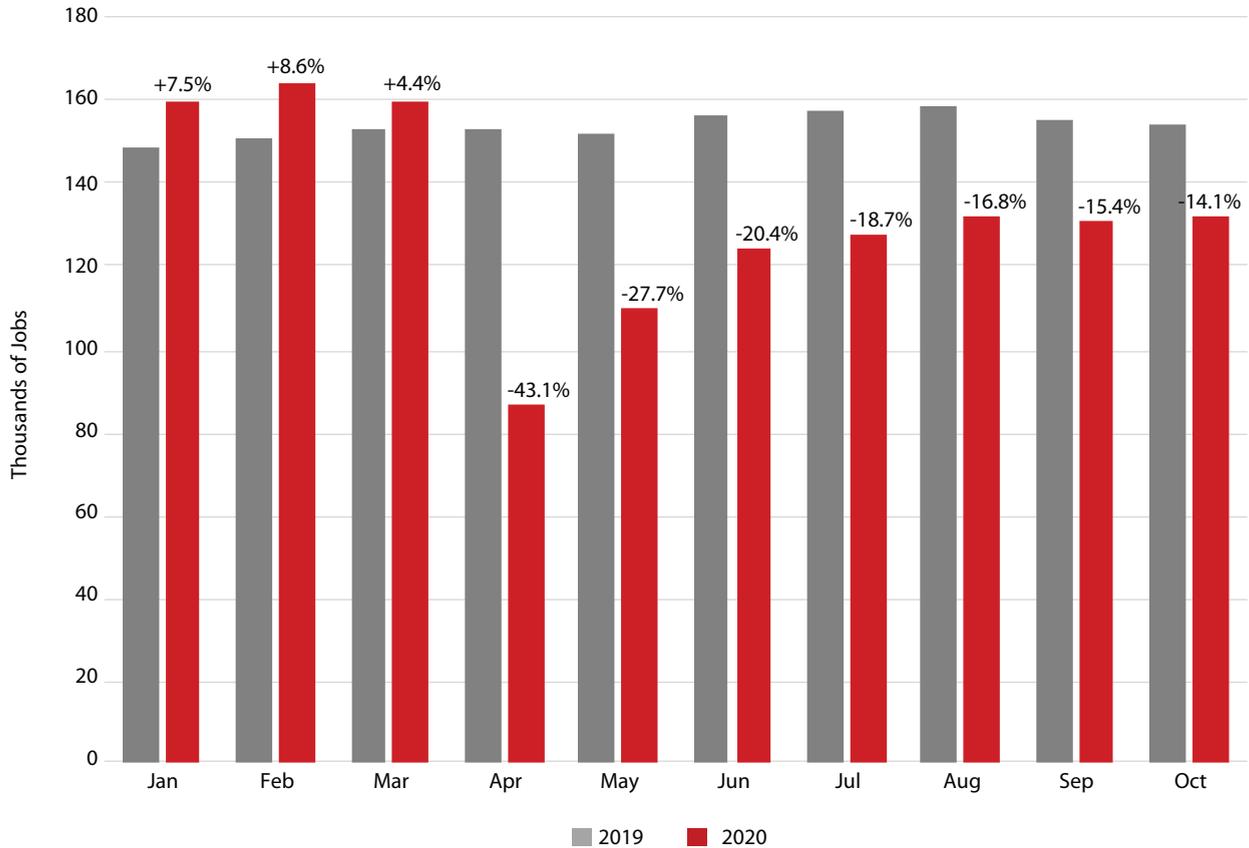


Source: Kem C. Gardner Policy Institute analysis of Utah State Tax Commission data

Tipping welcome

Utah leisure and hospitality employment, 2019–2020

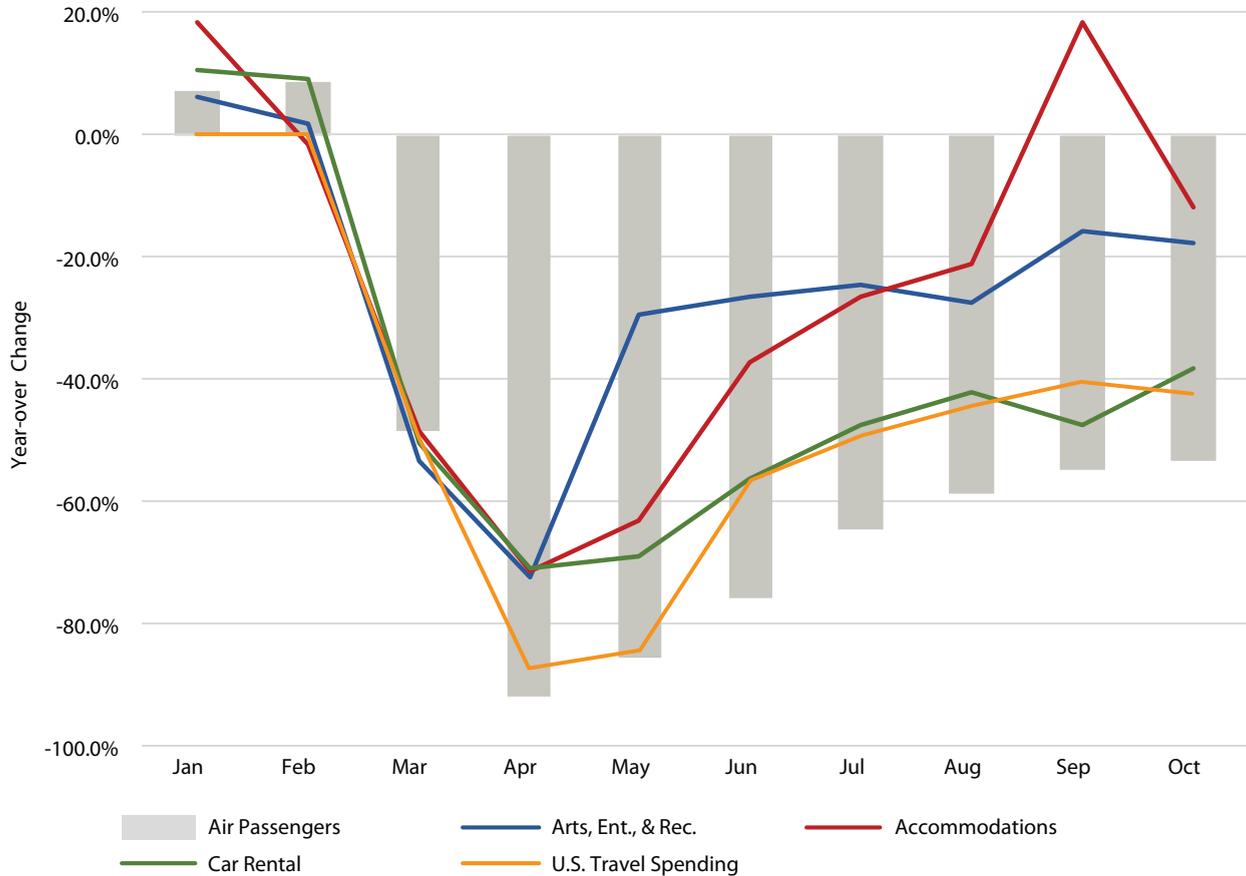
Total jobs and change from prior year



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

First-class airport awaits your arrival

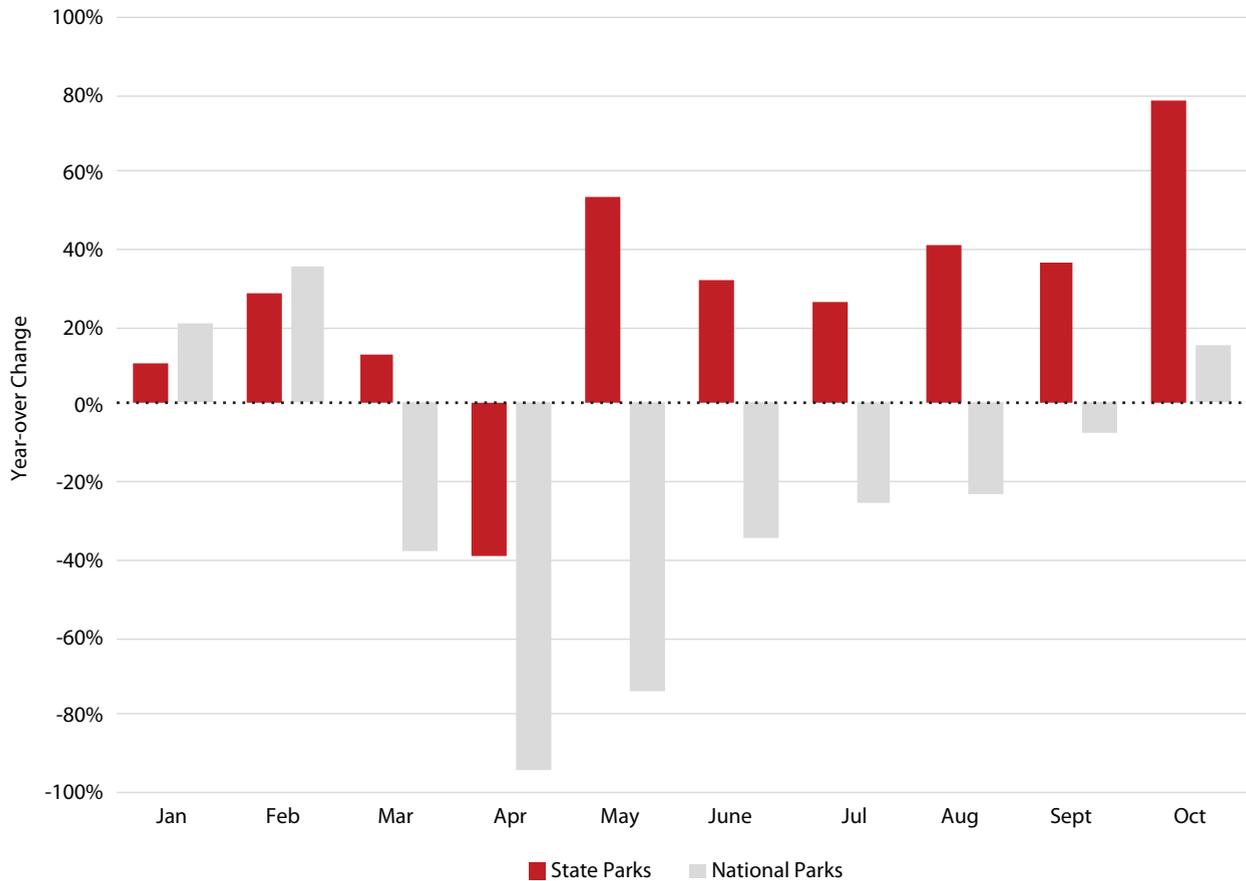
Year-over change in travel-related spending and SLC International Airport passengers, 2019–2020



Source: Kem C. Gardner Policy Institute analysis of Salt Lake City International Airport, Utah State Tax Commission, and U.S. Travel Association data

This land is your land

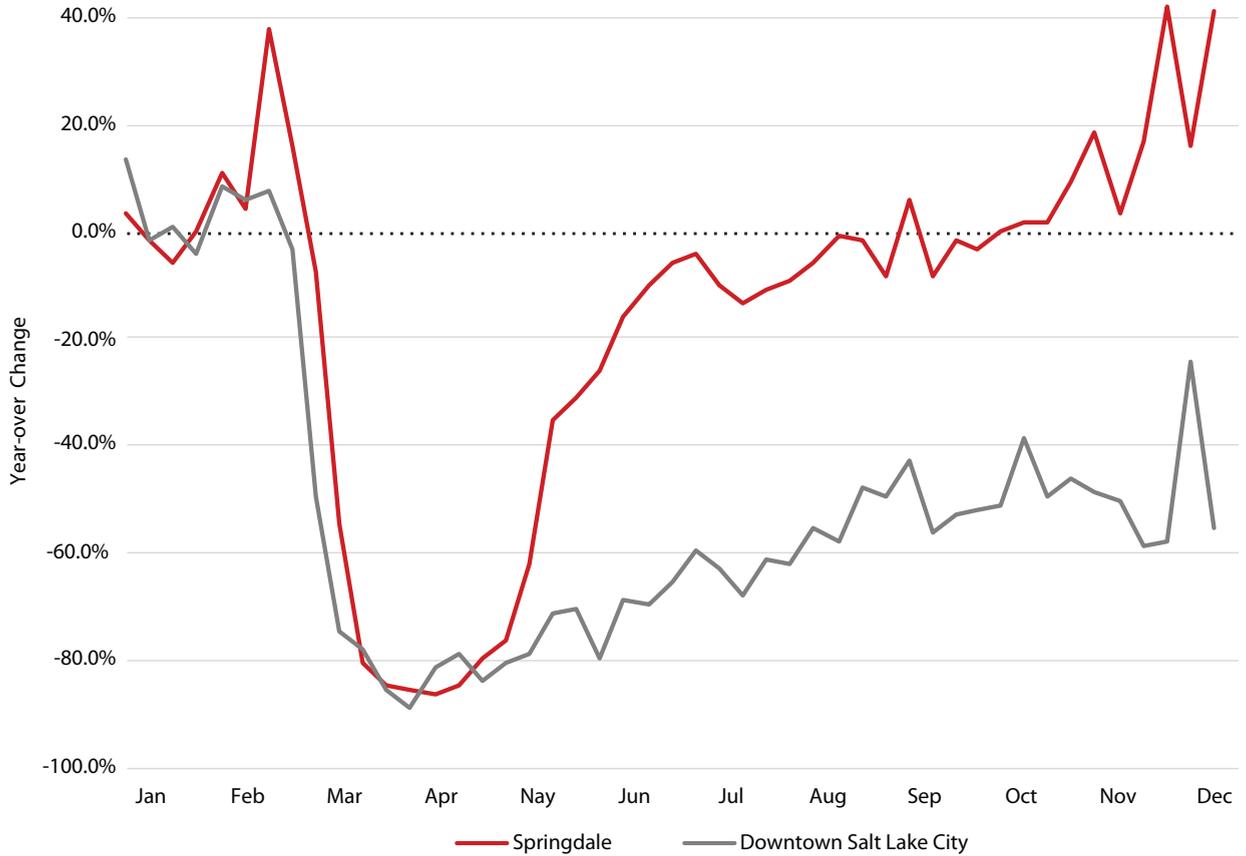
Year-over change in Utah park visitation, 2019–2020



Source: Kem C. Gardner Policy Institute analysis of National Park Service and Utah State Parks data

Come to Zion

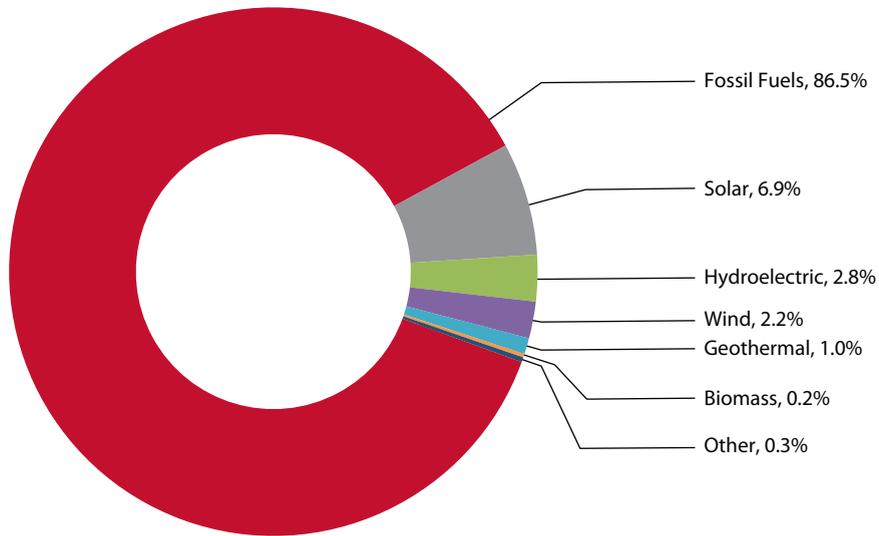
Year-over change in hotel occupancy rates, Springdale vs. downtown Salt Lake City, 2019–2020



Note: Republication or other re-use of this data without the express written permission of STR, Inc. is strictly prohibited.
Source: Kem C. Gardner Policy Institute analysis of STR, Inc., data

Utah's power cocktail

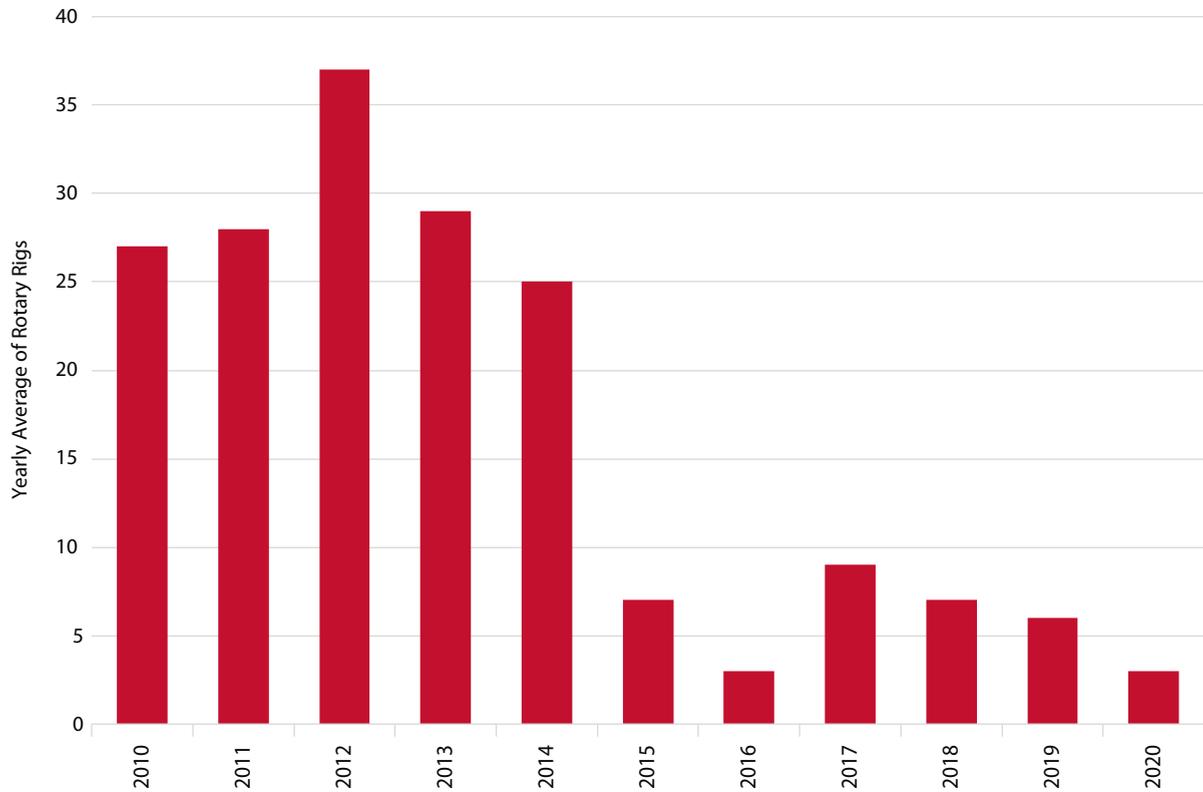
Fuel mix of electric power generation in Utah, 2020



Note: Data are through September. Fossil fuels consist of coal, natural gas, petroleum liquids, and other gases. Other comprises cogeneration, waste heat, and non-biogenic municipal solid waste.
Source: U.S. Energy Information Administration

Uinta Basin challenge

Rotary drilling rig count in Utah, 2010–2020

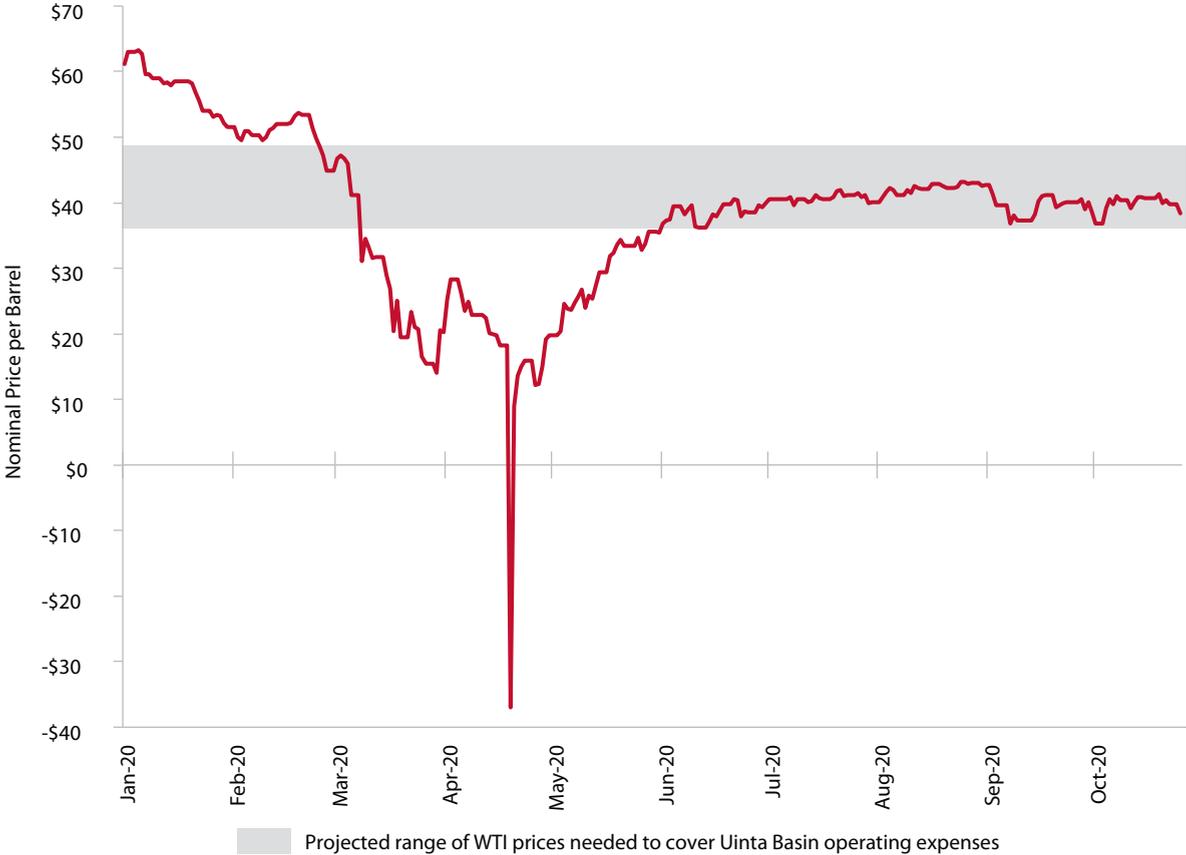


Note: 2020 data represents average of counts through August.

Source: Baker Hughes U.S. Annual Average Rig Count by State (2010–2016) and North America Monthly Rig Count by State (2017–2020)

Utah's oil price threshold

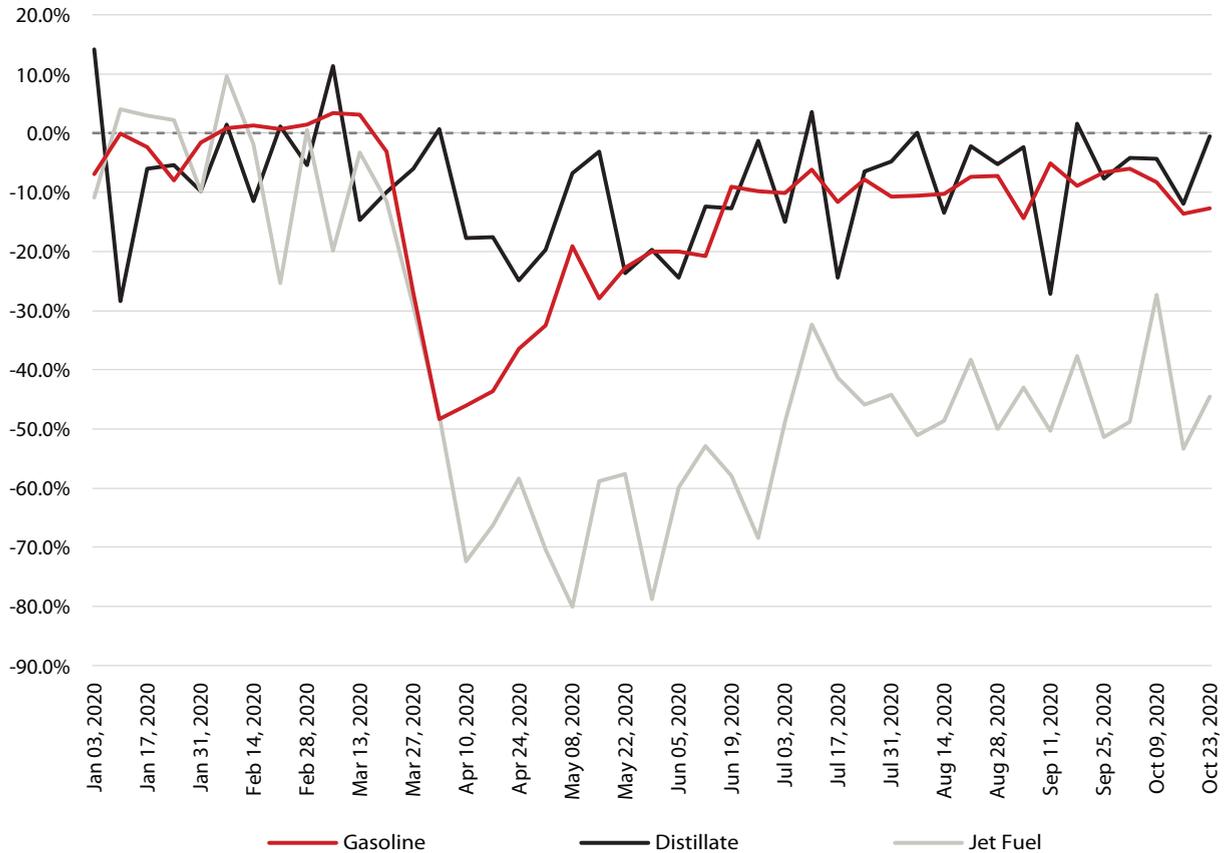
West Texas Intermediate crude oil prices, 2020



Source: Energy Information Administration (Cushing, OK WTI Spot Prices FOB)

Drive less, use less, fly much less

Year-over change in U.S. petroleum consumption, 2019–2020



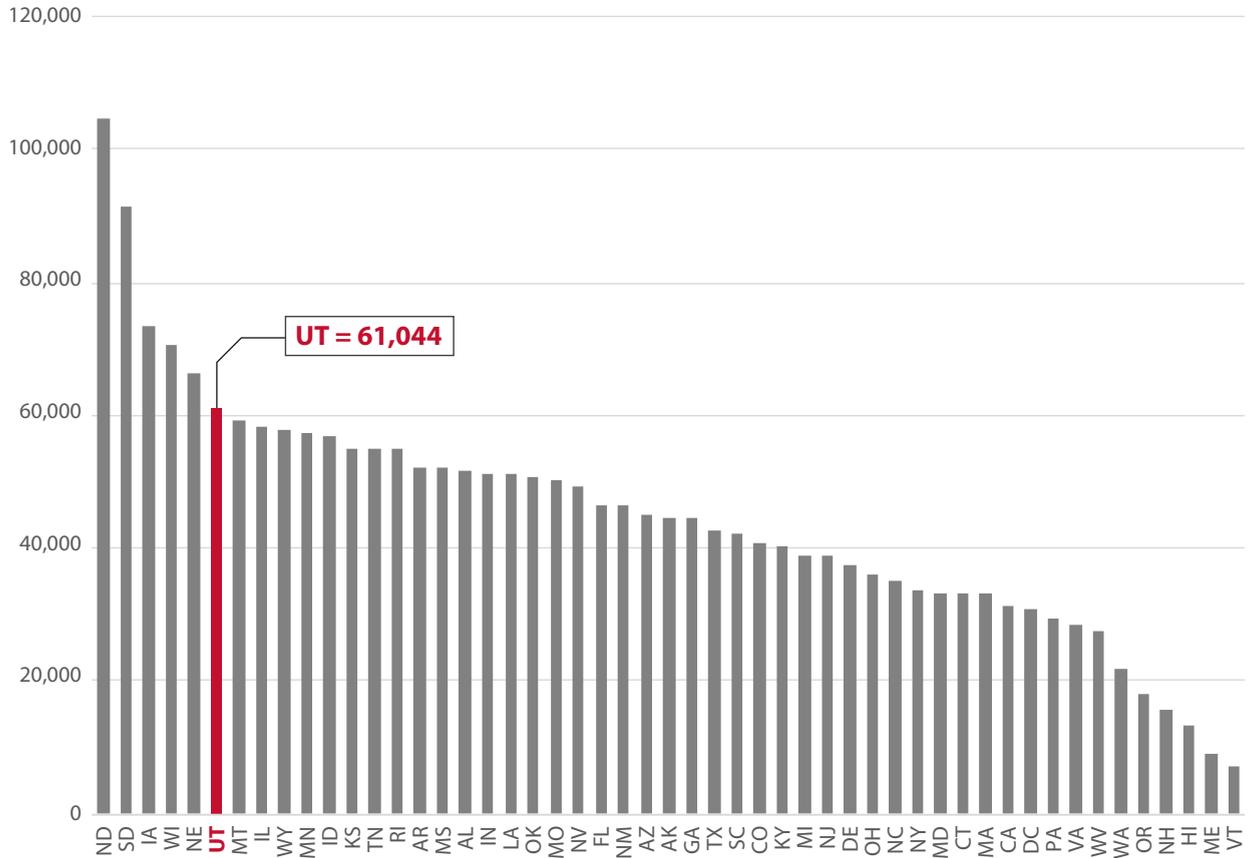
Note: Distillate consists mostly of diesel fuel

Source: U.S. Energy Information Administration, U.S. Weekly Product Supplied

Mask up, Utah

COVID-19 cases per 1,000,000 population by state

December 1, 2020



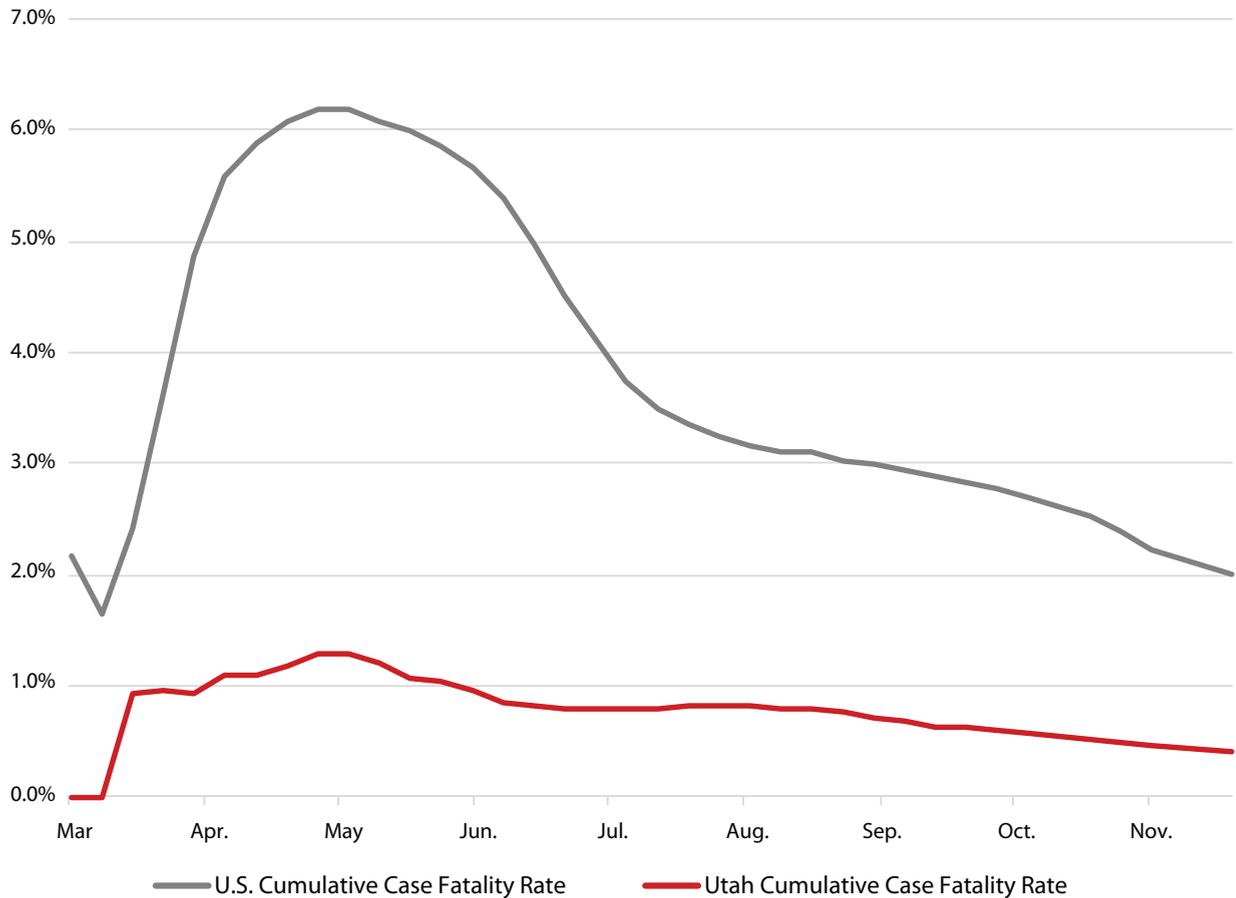
Note: Despite having a high rate of COVID-19 cases, Utah has maintained a low death rate compared to other states. On Dec. 1, 2020, Utah had the 6th lowest number of COVID-19 deaths per million population (272). That said, this rate is increasing. By Dec. 10, 2020, the rate was 310.

Source: Kaiser Family Foundation estimates based on Johns Hopkins University's COVID-19 Dashboard by the Center for Systems Science and Engineering (CSSE) and 2019 Population data from U.S. Census Bureau

Still hitting us hard

Cumulative COVID-19 case-fatality rates in Utah vs. U.S.

March 2020–December 2020



Note: Case-fatality rate is COVID-19 deaths as a percent of total COVID-19 cases. COVID-19 data as of December 3, 2020.

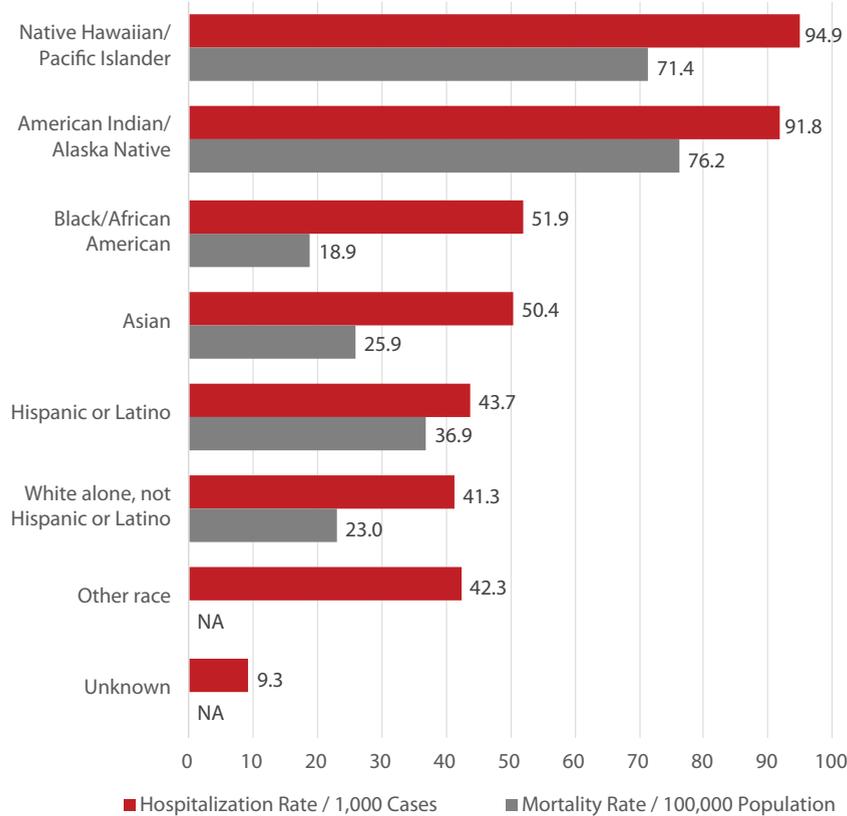
Utah's young population partly contributes to its low fatality rate.

Source: Utah Department of Health COVID-19 Surveillance; Johns Hopkins University (JHU) Coronavirus Resource Center

Utah's COVID-19 multicultural disparities

Utah COVID-19 hospitalization rate per 1,000 cases and mortality rate per 100,000 population by race and ethnicity

December 1, 2020



Utah Small Areas with Highest COVID-19 Case Rates

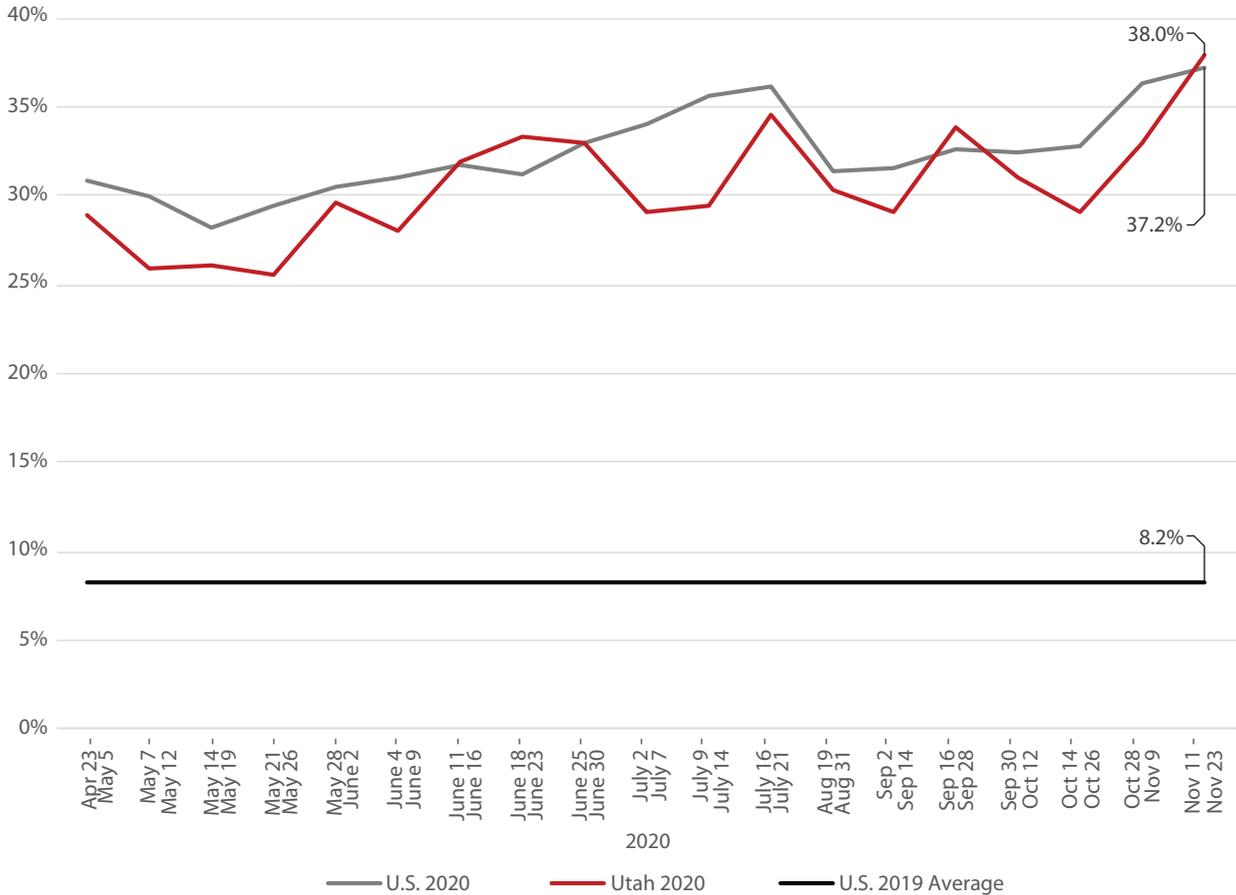
December 9, 2020

	Crude Case Rate / 100,000 Population
North Orem	14,098
Provo (East City Center)	11,877
Provo (West City Center)	11,297
Glendale	11,127
San Juan (excluding Blanding/Monticello)	10,626
West Valley (East)	10,470
Kearns	10,270
Rose Park	10,178
West Valley (Center)	10,095
West Valley (West)	9,949

Note: Utah's statewide average hospitalization rate was 41.7 per 1,000 cases and average mortality rate was 28.7 per 100,000 population as of December 1, 2020.
Source: Utah Department of Health COVID-19 Surveillance

High anxiety

Share of adults who report anxiety disorder symptoms in Utah vs. U.S., 2020

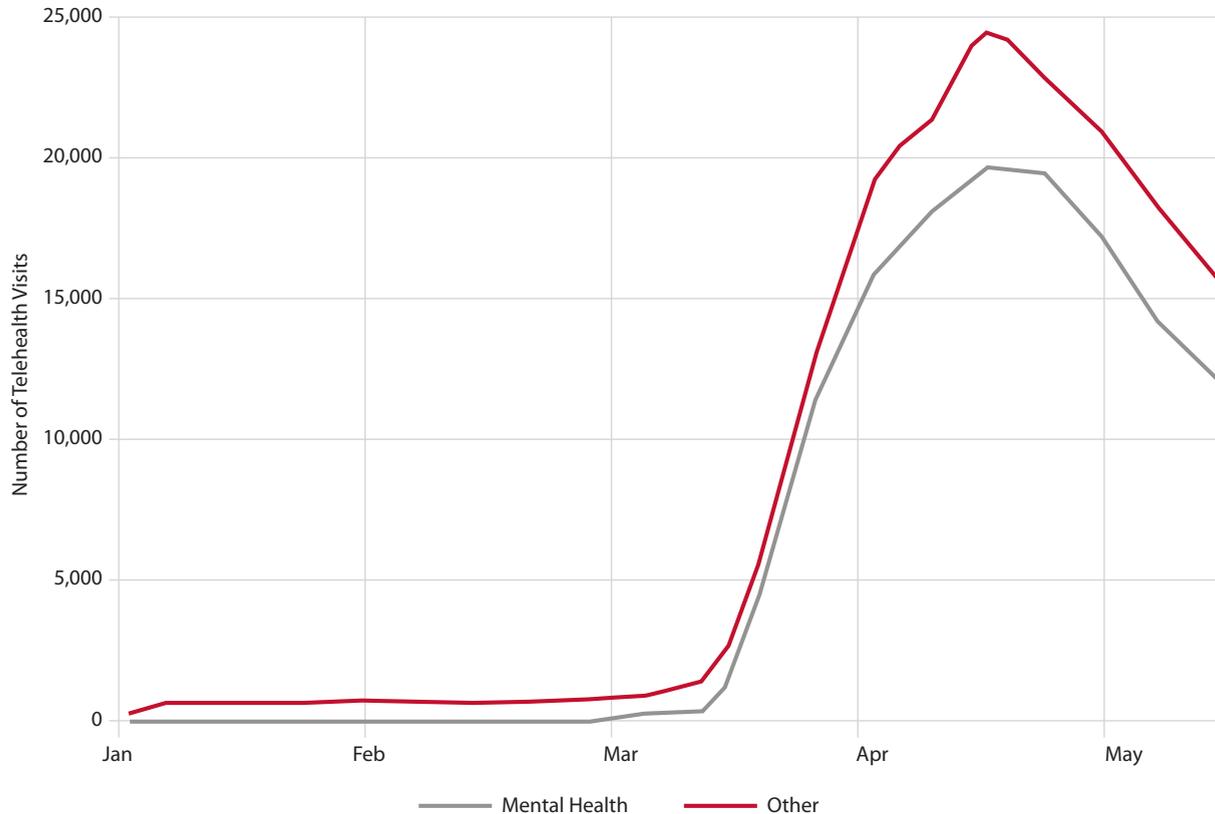


Note: Adults age 18 and older. U.S. 2019 average is from January to June.

Source: U.S. Census Bureau, Household Pulse Survey, 2020; National Center for Health Statistics, National Health Interview Survey, 2019

Dr. Zoom

Utah telehealth visits by type
January–August 2020 weekly totals

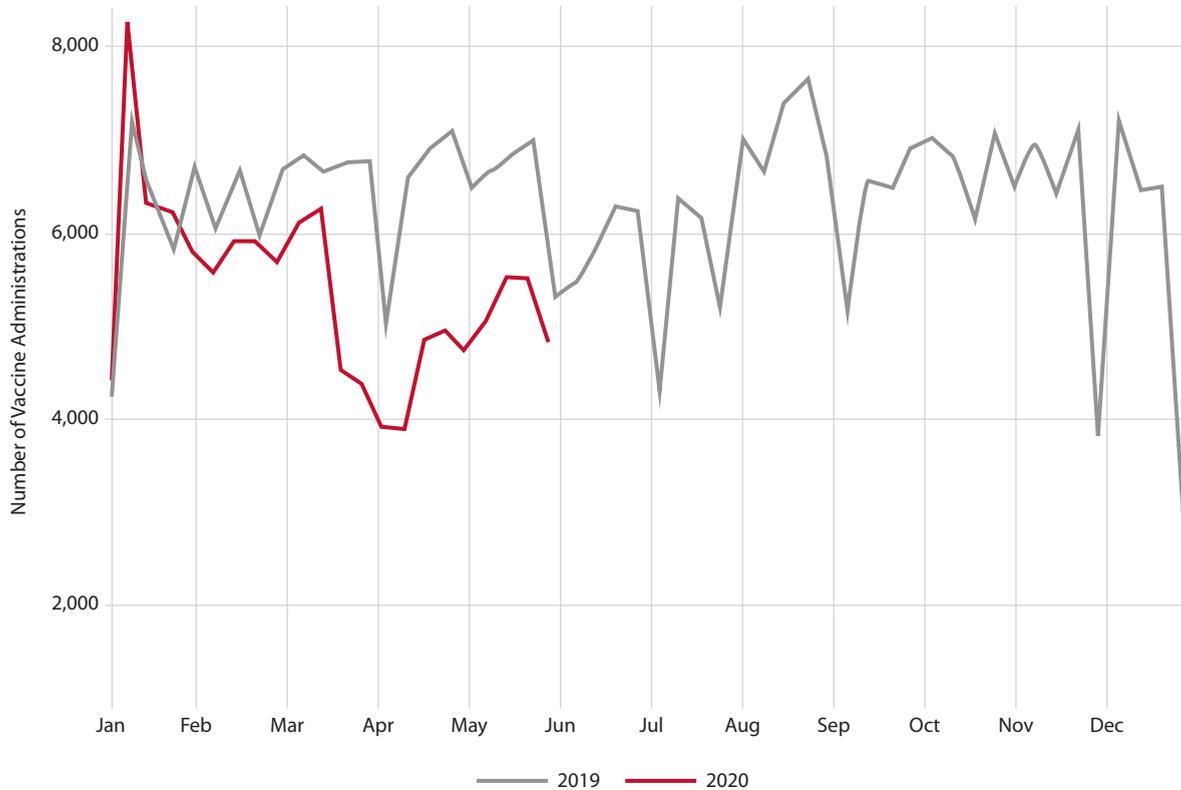


Note: Includes HCPCS/CPT procedure codes in the “Telehealth” category from the Clinic Classifications Software for Services and Procedures. Also includes any procedure otherwise indicated as being delivered via telehealth, i.e., Place of Service Code 02, CPT Modifiers 95 and GT.
Source: Utah All Payer Claims Database (APCD). From: Preliminary COVID-19 Healthcare Trends: A Snapshot from Utah’s All Payer Claims Database & Healthcare Facility Database. (2020, December). Utah Department of Health Office of Health Care Statistics.

Another unintended consequence of COVID-19

Utah childhood vaccinations

2019 compared to 2020

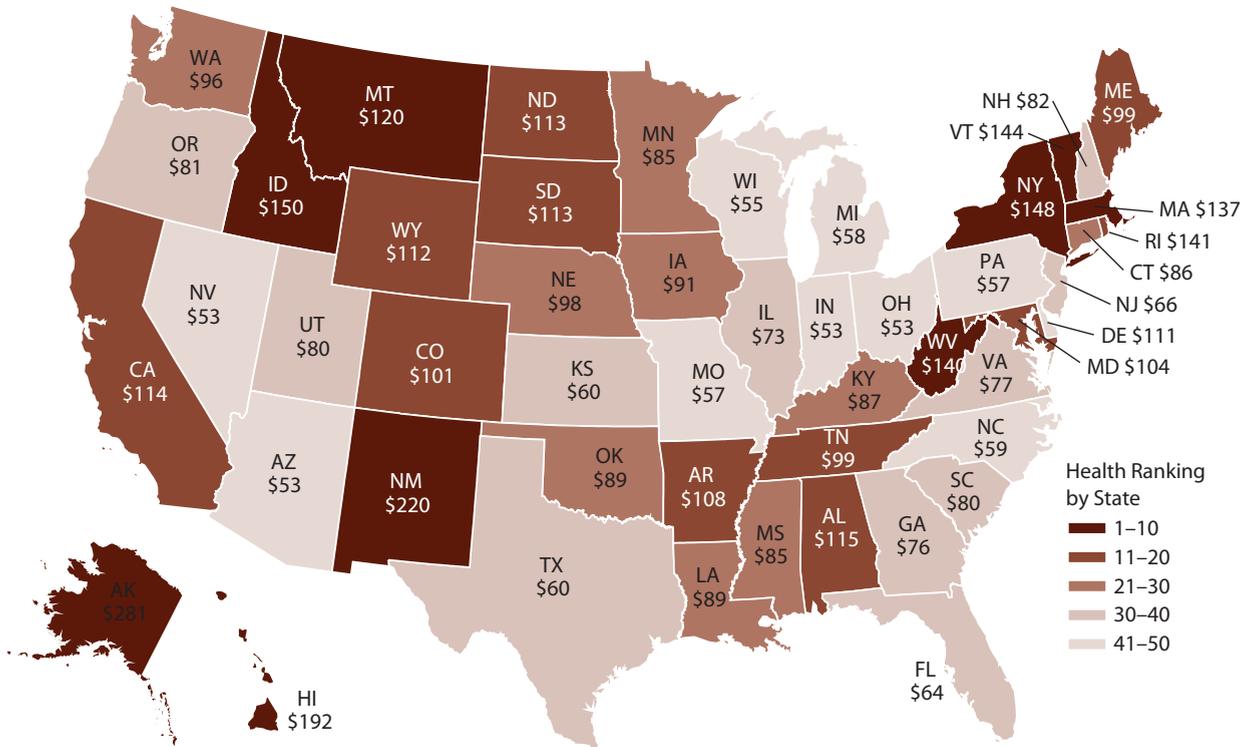


Note: The claims for the number of vaccines administered to children in 2020 largely mirrored 2019 trends for the months of January and February. In March 2020, a notable gap developed, which persists throughout the period of observation. Unlike some medical services which can be provided via telehealth, immunizations must be administered in person. Totals include diphtheria, tetanus and acellular pertussis (DTaP); polio (IPV); measles, mumps and rubella (MMR); haemophilus influenza type B (HiB); hepatitis B (HepB); chicken pox (VZV); and pneumococcal conjugate (PCV). Represents vaccines included in "Childhood Immunization Status Combination 3", as depicted by NCQA.

Source: Utah All Payer Claims Database (APCD). From: Preliminary COVID-19 Healthcare Trends: A Snapshot from Utah's All Payer Claims Database & Healthcare Facility Database. (2020, December). Utah Department of Health Office of Health Care Statistics.

Public health spending in Utah

Public health funding per capita by state, 2019



Health Ranking by State

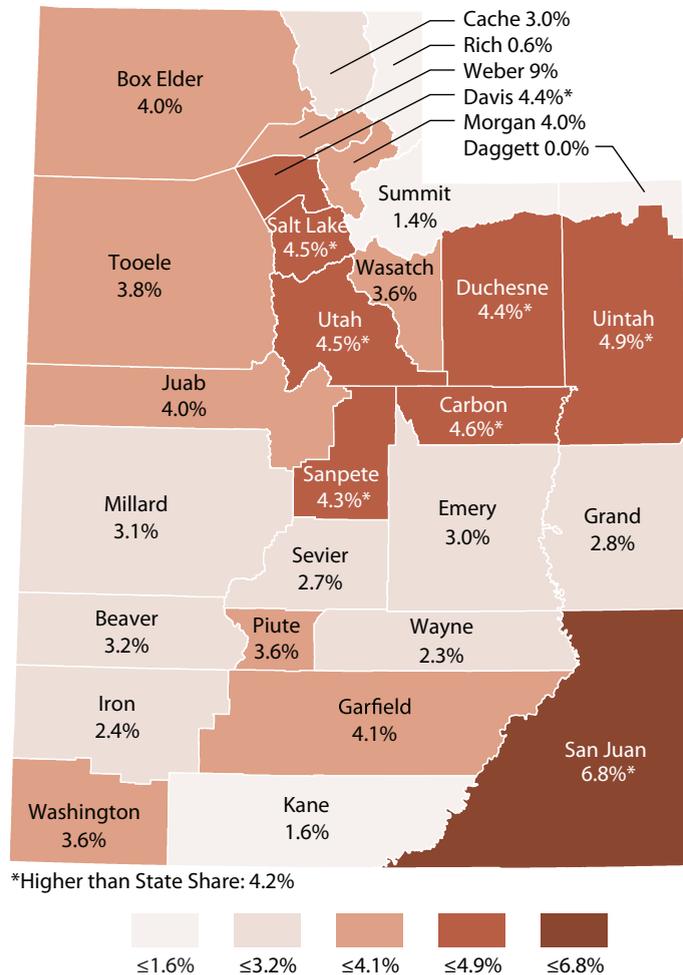
- 1-10
- 11-20
- 21-30
- 30-40
- 41-50

Note: State dollars dedicated to public health and federal dollars directed to states per person by the Centers for Disease Control and Prevention and the Health Resources & Services Administration (2-year estimate).
 Source: America's Health Rankings analysis of Trust for America's Health; U.S. HHS; U.S. Census Bureau, Annual Estimates of the Resident Population: April 1, 2010 to July 1, 2018, United Health Foundation, AmericasHealthRankings.org, Accessed 2020.

One big, happy family

Multigenerational households, 2014–2018

Percent of total households

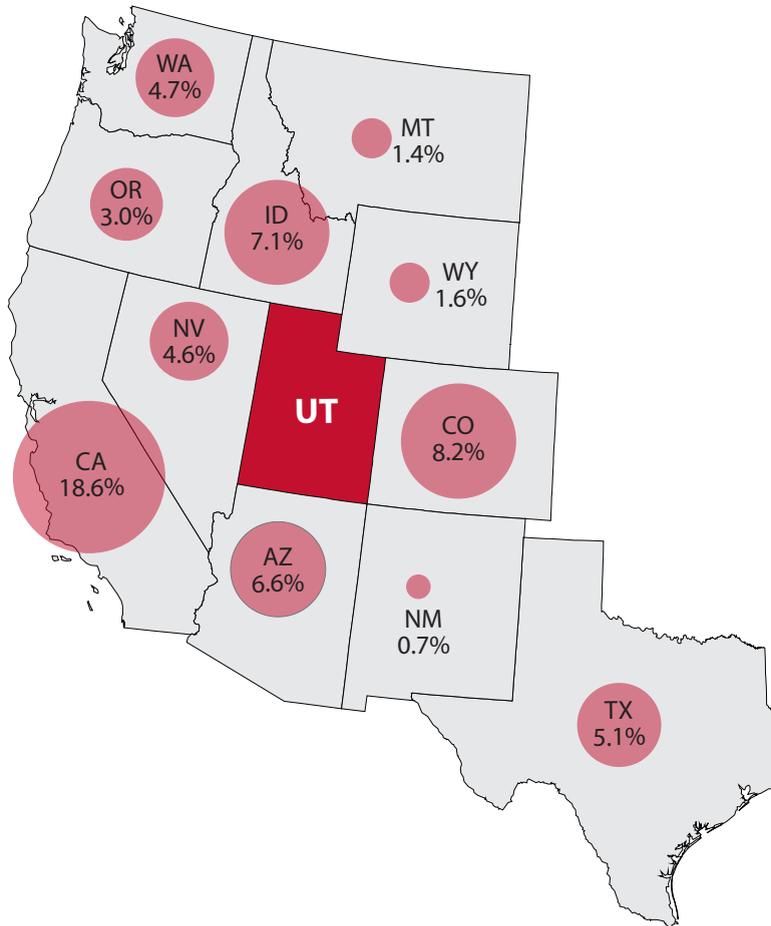


Source: American Community Survey 2018 5-Year Estimates

Moving next door

Current Utah residents who lived in a different western state one year ago, 2019

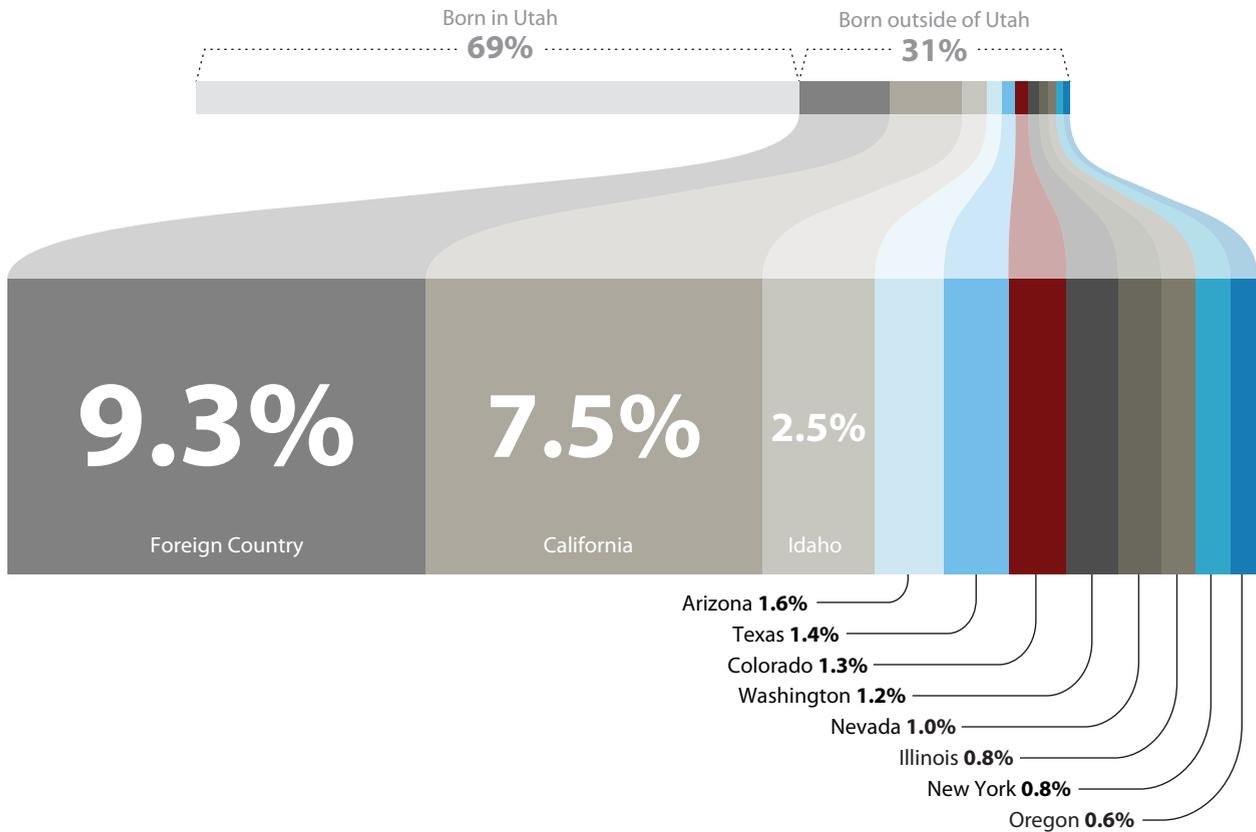
58,221 new residents (61%) are from the highlighted states



Sources: U.S. Census Bureau, 2019 1-Year American Community Survey Estimates

Utah's melting pot

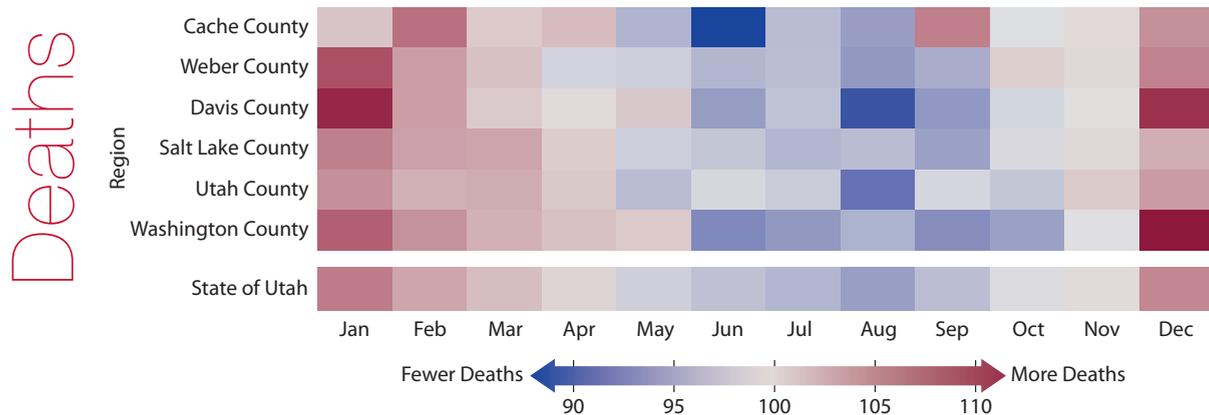
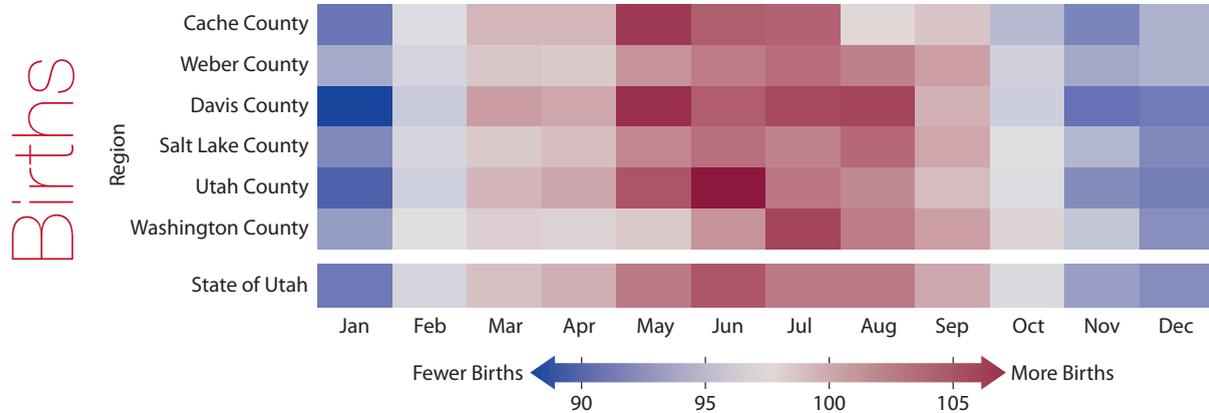
Place of birth for Utah residents, 2019



Note: Areas shown have at least 20,000 Utahns born there.
Source: U.S. Census Bureau, 2019 1-Year Estimates

To everything there is a season

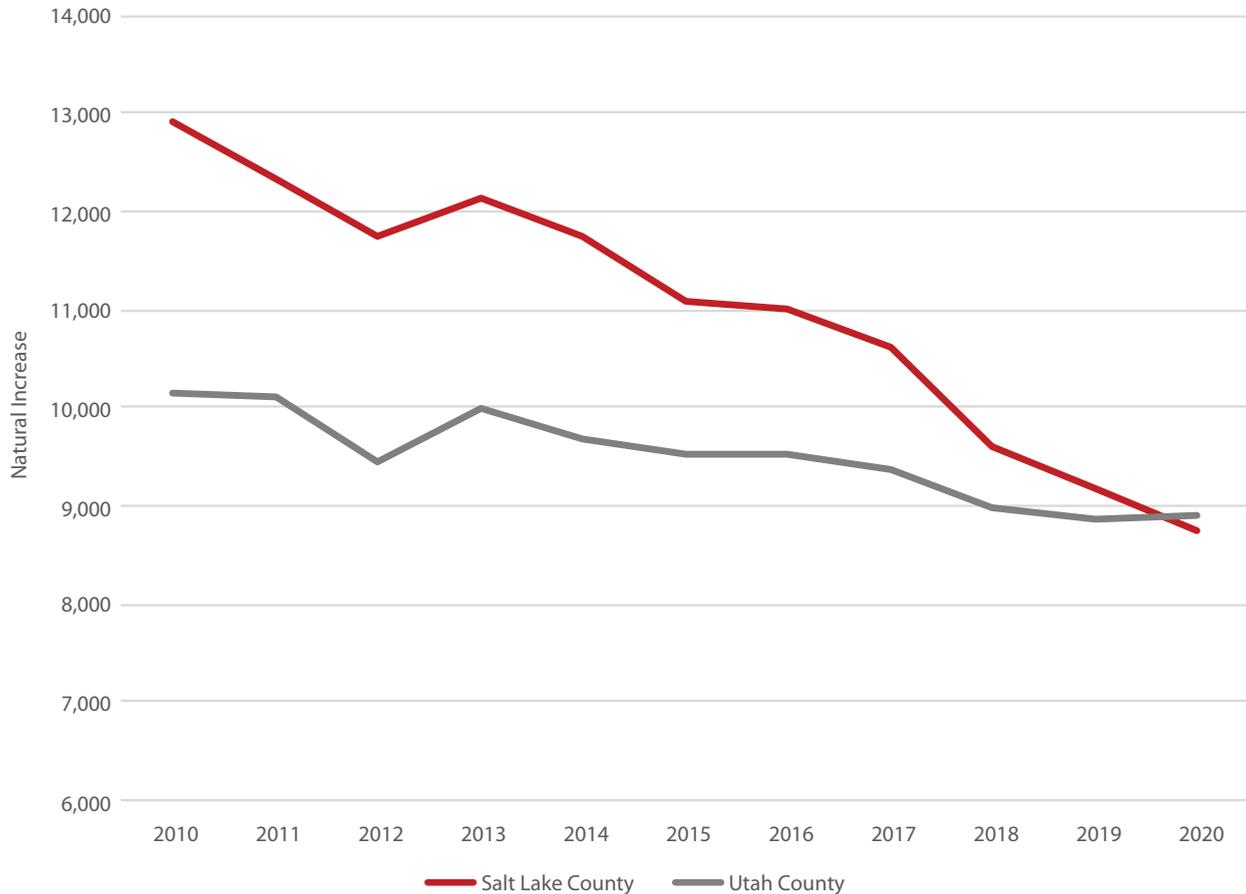
Seasonal births and deaths indexes for Utah and six largest counties, 2001–2017



Note: An index over 100 indicates more births or deaths occur in that month on average, and vice versa. See Wilson, T., McDonald, P., & Temple, J. (2020). The geographical patterns of birth seasonality in Australia. *Demographic Research*, 43(40), 1185–1198.
Sources: Kem C. Gardner Policy Institute, Utah Department of Health

Utah County...baby county

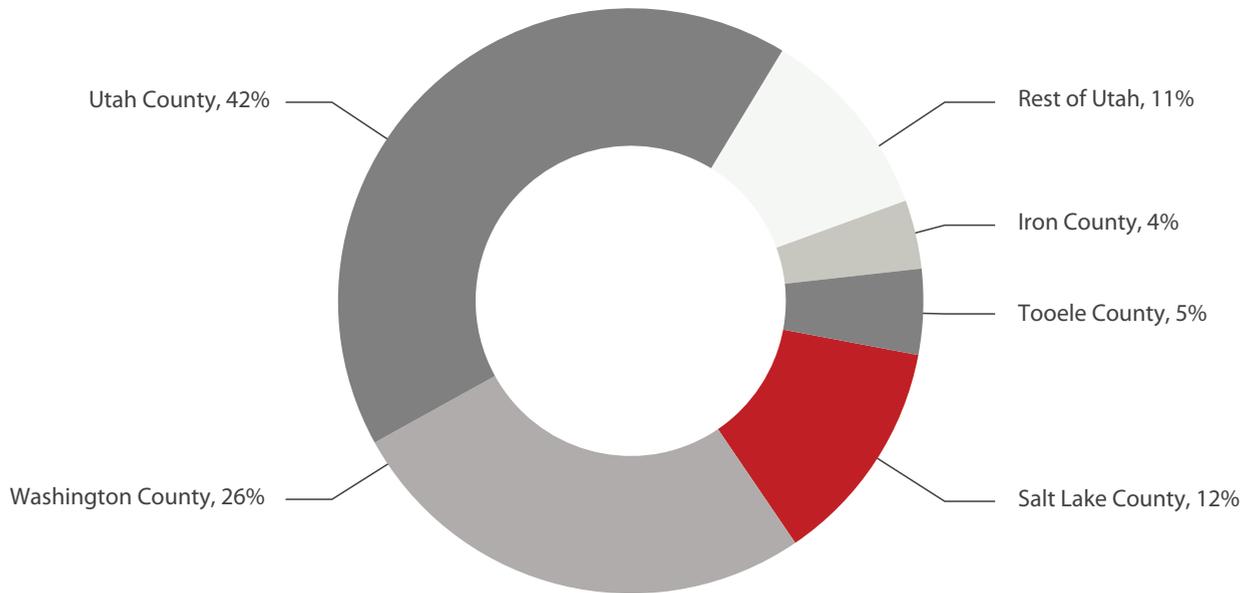
Natural increase in Salt Lake County and Utah County, 2010–2020



Source: Utah Population Committee, 2020

Utah County on the rise

Net migration as a share of population change, 2020



Source: Utah Population Committee, 2020

Live here, work there

Utah commuting data, 2018

Top 10 Commuting Counties

County	Workforce	Outbound Commuters	Percent of Workforce
Morgan	5,291	4,108	77.60%
Tooele	32,459	24,199	74.60%
Wasatch	15,985	11,399	71.30%
Rich	781	504	64.50%
Davis	150,699	95,330	63.30%
Piute	436	276	63.30%
Daggett	346	210	60.70%
Box Elder	27,135	16,051	59.20%
Juab	4,759	2,786	58.50%
Summit	21,904	11,829	54.00%

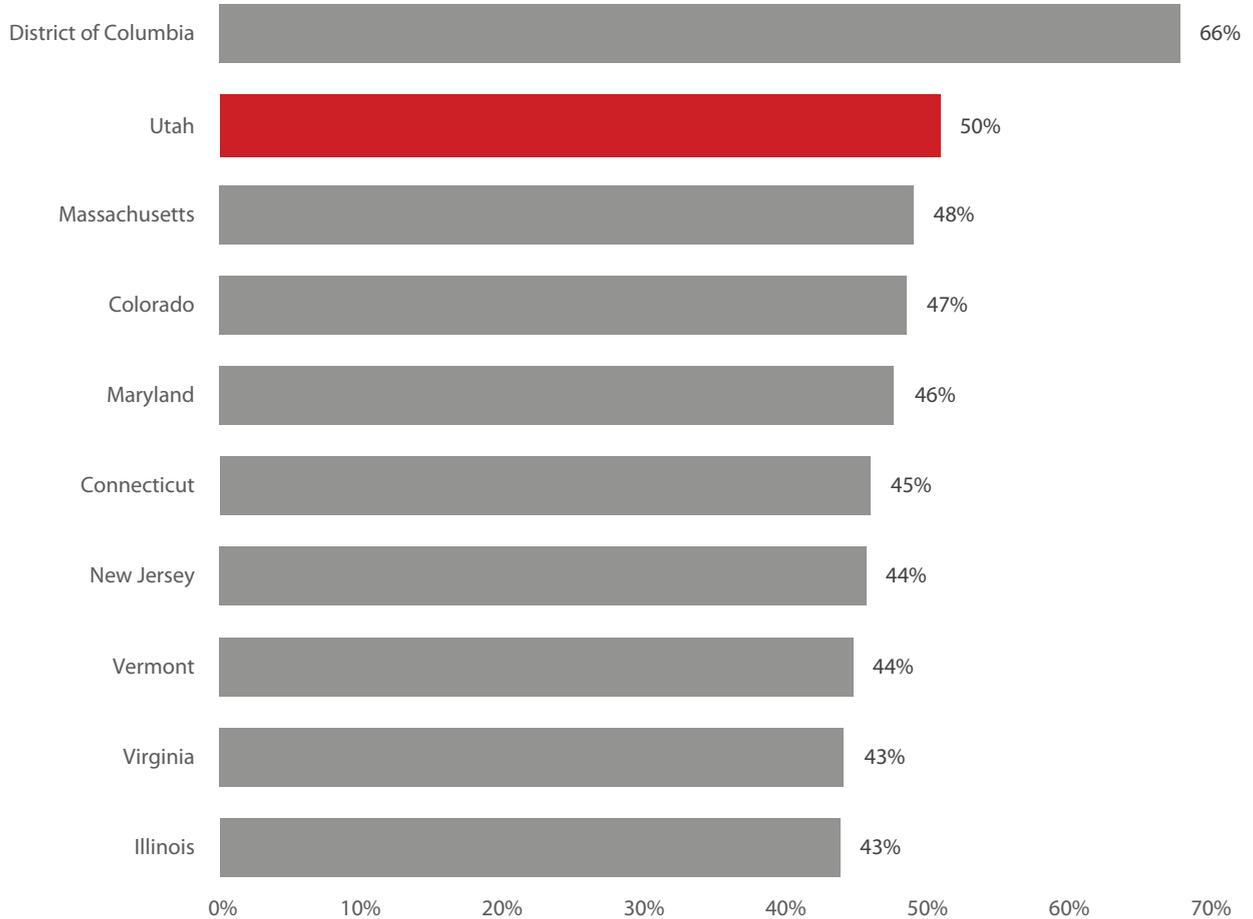
Top 10 Live & Work Counties

County	Workforce	Outbound Commuters	Percent of Workforce
Salt Lake	570,377	93,138	16.30%
Washington	64,412	13,904	21.60%
Grand	5,600	1,361	24.30%
San Juan	4,213	1,273	30.20%
Kane	3,280	1,187	36.20%
Utah	267,633	97,104	36.30%
Millard	5,402	1,990	36.80%
Beaver	2,383	881	37.00%
Cache	60,911	22,844	37.50%
Garfield	984	374	38.00%

Source: U.S. Census Bureau, OnTheMap, 2018 American Community Survey

But after COVID, commutes changed

COVID-19 Telework: Top-10 states

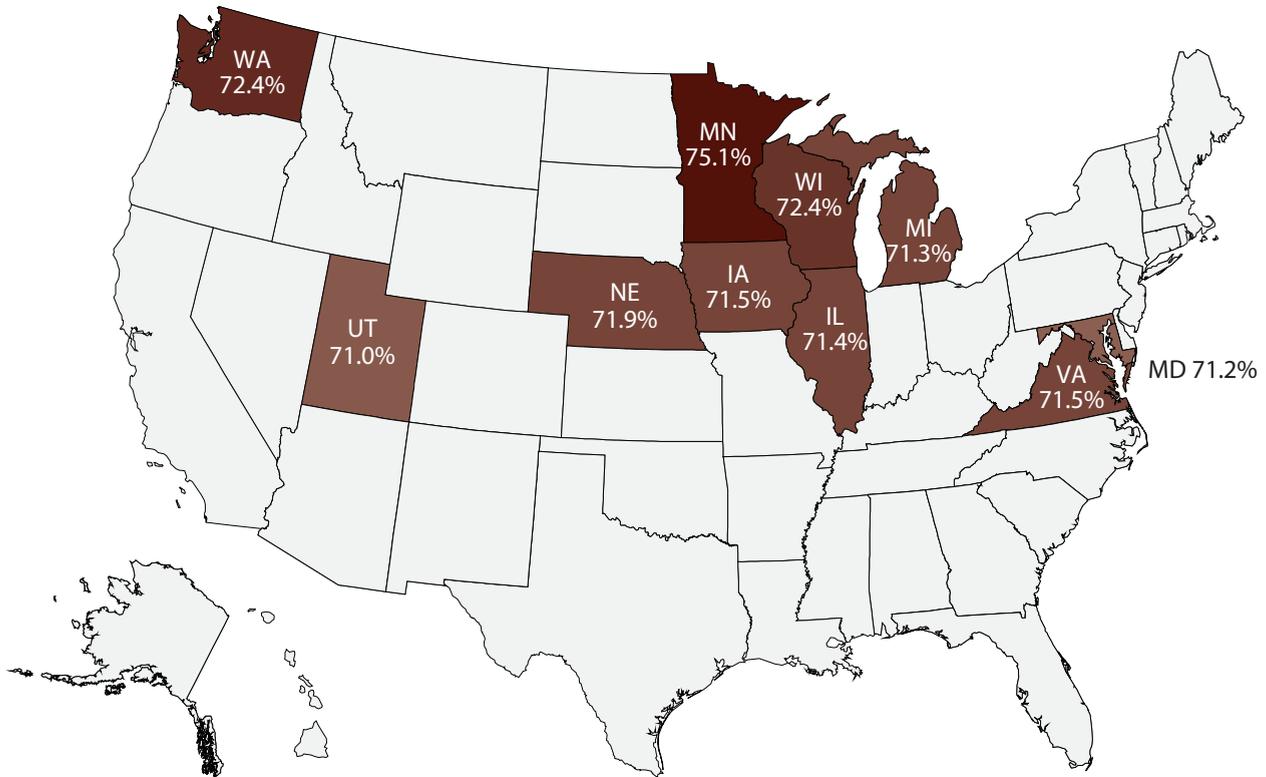


Note: Top 10 percentages of adults living in households where at least one adult has substituted some or all of their typical in-person work for telework because of the coronavirus pandemic
Source: U.S. Census Bureau, Household Pulse Survey Weeks 13-19 (August 19–November 23, 2020).

We like to be counted

Top-10 self-response rates by state for 2020 Census

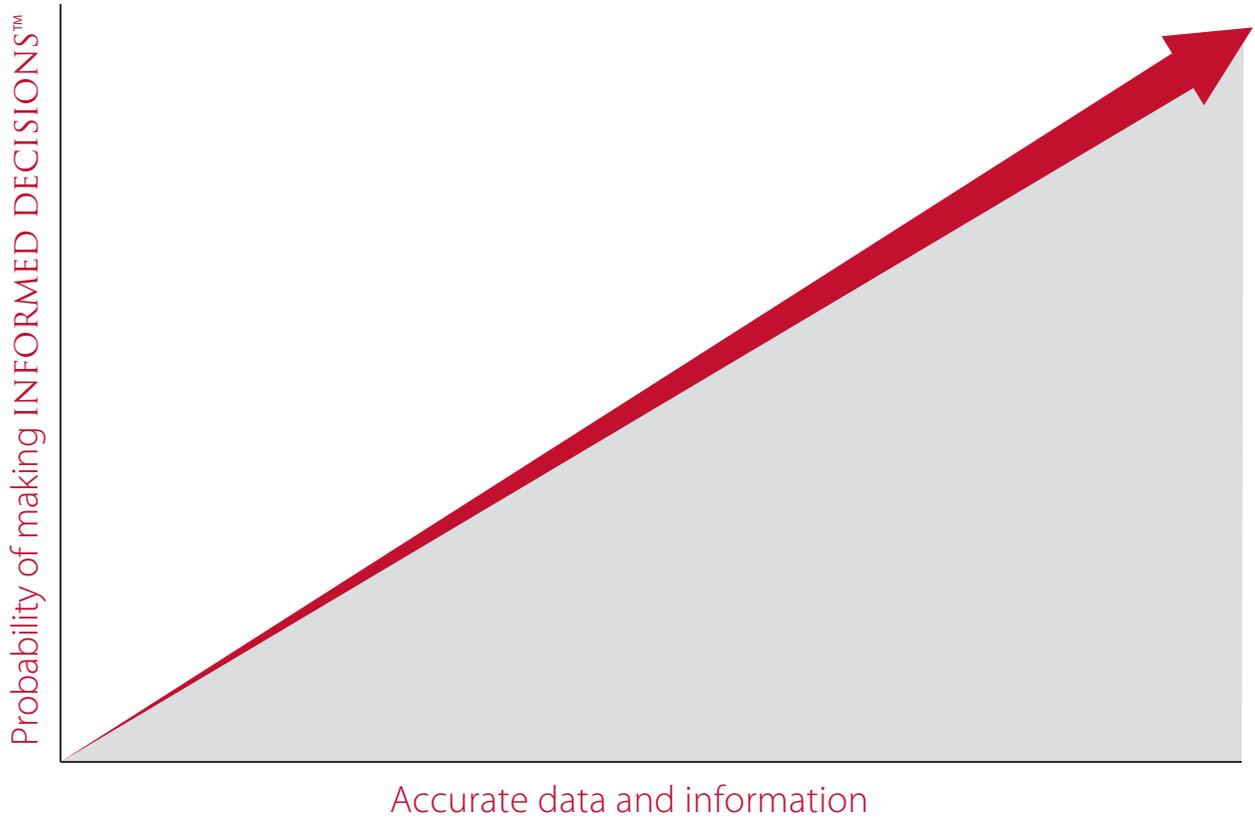
Utah ranked 10th of all states with 71% of Utahns self-responding to the 2020 Census



Nationally, 67% of people self-responded to the 2020 Census. Utahns beat that.

Source: U.S. Census Bureau, Response Rates as of October 28, 2020

The whole point



KEM C. GARDNER POLICY INSTITUTE STAFF AND ADVISORS

Leadership Team

Natalie Gochmour, Associate Dean and Director
Jennifer Robinson, Associate Director
Shelley Kruger, Accounting and Finance Manager
Colleen Larson, Administrative Manager
Dianne Meppen, Director of Survey Research
Pamela S. Perlich, Director of Demographic Research
Juliette Tennert, Chief Economist
Nicholas Thiriot, Communications Director
James A. Wood, Ivory-Boyer Senior Fellow

Faculty Advisors

Matt Burbank, College of Social and Behavioral Science
Adam Meirowitz, David Eccles School of Business
Elena Patel, David Eccles School of Business
Nathan Seegert, David Eccles School of Business

Senior Advisors

Jonathan Ball, Office of the Legislative Fiscal Analyst
Gary Cornia, Marriott School of Business
Wes Curtis, Community-at-Large
Theresa Foxley, EDCUtah
Dan Griffiths, Tanner LLC
Darin Mellott, CBRE
Chris Redgrave, Community-at-Large
Wesley Smith, Western Governors University

Staff

Max Backlund, Senior Research Associate
Samantha Ball, Senior Research Associate
Mallory Bateman, Senior Research Analyst
Andrea Thomas Brandley, Research Associate
Marin Christensen, Research Associate
Mike Christensen, Scholar-in-Residence
Phil Dean, Public Finance Senior Research Fellow
John C. Downen, Deputy Director of Economic
and Public Policy Research
Dejan Eskic, Senior Research Fellow
Emily Harris, Demographer
Michael T. Hogue, Senior Research Statistician
Mike Hollingshaus, Senior Demographer
Thomas Holst, Senior Energy Analyst
Meredith King, Research Associate
Jennifer Leaver, Senior Tourism Analyst
Levi Pace, Senior Research Economist
Shannon Simonsen, Research Coordinator
Joshua Spolsdoff, Research Economist
Paul Springer, Senior Graphic Designer
Laura Summers, Senior Health Care Analyst
Natalie Young, Research Analyst

Partners in the Community

The following individuals and entities help support the research mission of the Kem C. Gardner Policy Institute.

Legacy Partners

The Gardner Company
Intermountain Healthcare
Clark and Christine Ivory Foundation
KSL and Deseret News
Larry H. & Gail Miller Family Foundation
Mountain America Credit Union
Salt Lake City Corporation
Salt Lake County
University of Utah Health
Utah Governor's Office of
Economic Development
WCF Insurance
Zions Bank

Executive Partners

Mark and Karen Bouchard
The Boyer Company
Salt Lake Chamber

Sustaining Partners

Clyde Companies
Dominion Energy
Staker Parson Materials and
Construction

Kem C. Gardner Policy Institute Advisory Board

Conveners

Michael O. Leavitt
Mitt Romney

Board

Scott Anderson, Co-Chair
Gail Miller, Co-Chair
Doug Anderson
Deborah Bayle
Cynthia A. Berg
Roger Boyer
Wilford Clyde
Sophia DiCaro
Cameron Diehl
Lisa Eccles
Spencer P. Eccles

Christian Gardner
Kem C. Gardner
Kimberly Gardner
Natalie Gochnour
Brandy Grace
Clark Ivory
Mike S. Leavitt
Derek Miller
Ann Millner
Sterling Nielsen
Cristina Ortega
Jason Perry
Ray Pickup
Gary B. Porter
Taylor Randall
Jill Remington Love

Brad Rencher
Josh Romney
Charles W. Sorenson
James Lee Sorenson
Vicki Varela
Ruth V. Watkins

Ex Officio (invited)

Governor Spencer Cox
Speaker Brad Wilson
Senate President
Stuart Adams
Representative Brian King
Senator Karen Mayne
Mayor Jenny Wilson
Mayor Erin Mendenhall

Salt Lake Chamber Board of Directors

Craig Wagstaff, Chair
Gary Porter, Vice Chair
Nathan Callister
Wilford Clyde
John Dahlstrom
Theresa Foxley
Natalie Gochnour
Kay Hall
Gary Hoogeveen

Clark Ivory
Greg Johnson
Fred Lampropoulos
Dr. Donna Milavetz
Derek Miller
Abby Murtagh
Sterling Nielsen
Scott Parson
Ray Pickup

Gaby Poirier
Nico Bamberger Priskos
Joel Raup
Steve Starks
Linda Wardell

Kem C. Gardner Policy Institute

Thomas S. Monson Center | 411 E. South Temple Street
Salt Lake City, UT 84111 | 801-585-5618 | gardner.utah.edu

DAVID ECCLES SCHOOL OF BUSINESS
UNIVERSITY OF UTAH