

Utah Data Guide

A Newsletter For Data Users

Utah State Data Center
 Governor's Office of Planning and Budget
 Demographic and Economic Analysis

Census 2000 Special EEO Tabulation

In December 2003 the U.S. Census Bureau released the Census 2000 Special Equal Employment Opportunity (EEO) Tabulation. The Special EEO Tabulation comes from the U.S. Census Bureau's internal detailed sample data file (long-form data) and is not included in Summary File 3 or Summary File 4. The EEO File for 2000 is not a standard Census Bureau product like it was in 1980 and 1990. Instead, it was produced as a special tabulation contracted by and paid for by four federal agencies (the Department of Labor, Office of Personnel Management, Department of Justice, and the EEO Commission).

Census 2000 Special EEO Tabulation cross tabulates race and ethnicity by other variables such as; detailed occupations, occupational groups, sex, worksite geography, residence geography, education, age, and industry, according to where people worked at the time of Census 2000.

These datasets provide the number of people by occupation, sex, and race and ethnicity who work in a given county or place, who live in the same county or place, and who commute from surrounding counties and places. Tabulation universes are based on the newly revised Standard

Purpose of the EEO File.

The purpose of the EEO file is to assist employers in measuring their compliance to employment practices and civil rights laws and regulations in the workplace. The Equal Employment Opportunity Commission (EEOC) and other regulatory agencies required employers to make use of these data, in the operation of affirmative action/equal employment opportunity programs.

This special tabulation serves as the primary point of reference for comparing the race, ethnicity, and sex composition of an organization's internal workforce, as well as the corresponding external labor market, within a specified geography and job category.

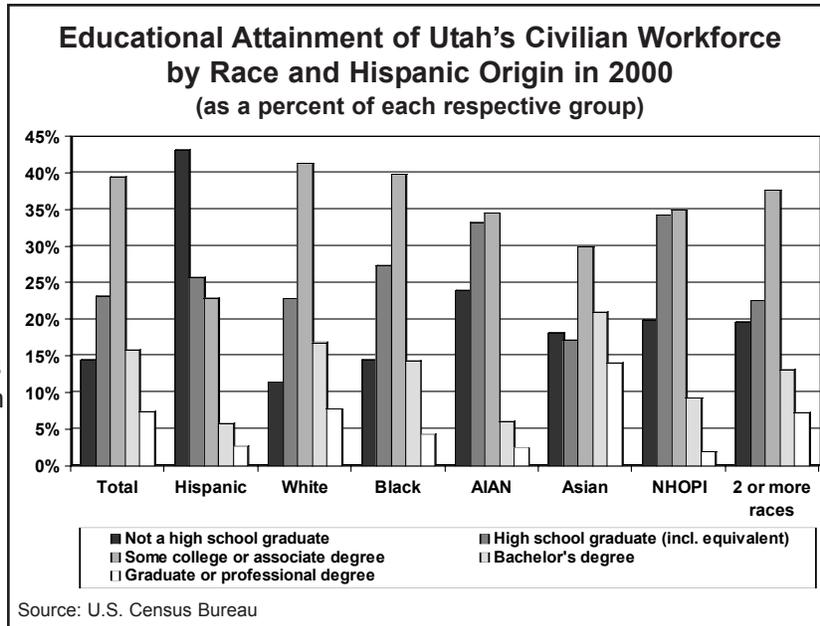
What is Included. All the specifications on the file are what the four federal agencies mentioned earlier requested. However, it contains data similar to that in comparable files from the 1970, 1980 and 1990 censuses. The datasets on the

Occupational Classification (SOC) and include occupation by industry, occupation by earnings categories, occupation by educational attainment, and occupation by age categories.

Twelve race and ethnicity categories are included for all geographies, except Hawaii for which fifteen race and ethnicity categories are included.

Geographies Covered and Population Threshold Requirements. The 1990 Census EEO data included

places (cities) of 50,000 or more, all counties, metropolitan areas, states, DC, and the total U.S. To protect the confidentiality of Census 2000 respondents, the EEO tabulations do not provide data for counties with a population of less than 50,000 (or 100,000 in some instances) when the datasets in the EEO file contain very detailed information or a large number of cells. For example, for worksite/residence datasets that contain information for 471 or 268 detailed



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Census 2000 Special EEO Tabulation

occupational categories, county data will not be available. However, for worksite/residence datasets with more highly aggregated occupational categories, such as the EEO occupational groups, data will be available for all counties.

Counties in Utah with a population of 50,000 or more include: Cache, Davis, Salt Lake, Utah, Washington, and Weber. The counties that do not meet the population threshold for selected tabulations have been aggregated with other less populated counties. The Utah aggregated county sets are: 1) Beaver, Iron, and Millard; 2) Box Elder, Cache and Rich; 3) Carbon, Daggett, Duchesne, and Uintah; 4) Juab, Sanpete, and Tooele; 5) Morgan, Summit, and Wasatch; and 6) Wayne and surrounding counties.

The metropolitan areas used in the tabulations are those as defined as of June 30, 1999.¹ The Utah metropolitan areas

¹ The Metropolitan Areas discussed in this article are those as defined for the 2000 Census. In June 2003 the Office of Management and Budget (OMB) redefined the standards for Metropolitan Statistical Areas. Under the new definitions there are five new Metropolitan Statistical Areas (MSA) in Utah: Ogden-Clearfield MSA, Salt Lake City MSA, St. George MSA, Provo-Orem MSA, and Logan MSA. A more complete discussion of the new standards and their impact on Utah can be found in the Summer 2003 edition of the *Utah Data Guide*.

included in the Special EEO file are Provo-Orem and Salt Lake-Ogden.

Worksite/Residence Data. The residence-based datasets have 472 occupational categories and the worksite-based and worksite/residence datasets have 471 categories. The difference is because the residence-based datasets contain a Census occupational category for the unemployed with no work experience since 1995 (Census code 992)--people in this category have a place of residence but no worksite.

The education, age, and earnings datasets are based on labor force data. However, the worksite/residence and worksite datasets do not include the unemployed (Census occupational code 992). The residence datasets do include the unemployed.

Additional Information. For more information on the Census 2000 Special EEO Tabulation, visit the Census Bureau's web site at <http://www.census.gov>, or contact the State Data Center at (801) 538-1036.

Subject Matter Variables on the Special EEO Tabulation

<p>Race and Ethnicity for Other than Hawaii (12)</p> <ol style="list-style-type: none"> 1. White alone not Hispanic or Latino 2. White alone Hispanic or Latino 3. Black or African American alone not Hispanic or Latino 4. Asian alone not Hispanic or Latino 5. Native Hawaiian or Other Pacific Islander alone not Hispanic or Latino 6. American Indian or Alaska Native alone not Hispanic or Latino 7. Black or African American <i>and</i> White not Hispanic or Latino 8. Asian <i>and</i> White not Hispanic or Latino 9. American Indian or Alaska Native <i>and</i> White not Hispanic or Latino 10. American Indian or Alaska Native <i>and</i> Black or African American not Hispanic or Latino 11. Balance of individuals reporting more than one race not Hispanic or Latino plus individuals reporting some other race not Hispanic or Latino 12. Other Hispanic or Latino 	<p>Educational Attainment (5)</p> <ol style="list-style-type: none"> 1. Not high school graduate 2. High school graduate (including equivalency) 3. Some college or associate degree 4. Bachelor's degree 5. Graduate or professional degree <p>Educational Attainment (6)</p> <ol style="list-style-type: none"> 1. Not high school graduate 2. High school graduate (including equivalency) 3. Some college or associate degree 4. Bachelor's degree 5. Master's degree 6. Doctoral degree or professional degree 	<p>Younger Age Groups (4)</p> <ol style="list-style-type: none"> 1. 16-19 years 2. 20-34 years 3. 35-39 years 4. 40 years and over <p>Older Age Groups (ADEA Protected Class Groups) (4)</p> <ol style="list-style-type: none"> 1. 16 - 39 years 2. 40 - 49 years 3. 50 - 59 years 4. 60 years and over
	<p>Sex (2)</p> <ol style="list-style-type: none"> 1. Male 2. Female 	<p>Earnings (8)</p> <ol style="list-style-type: none"> 1. No Earnings 2. Less than \$15,000 3. \$15,000 - \$24,999 4. \$25,000 - \$34,999 5. \$35,000 - \$49,999 6. \$50,000 - \$74,999 7. \$75,000 - \$124,999 8. \$125,000 or more

Source: U.S. Census Bureau, Census 2000 Special EEO Tabulation

Educational Attainment of Utah's Civilian Workforce by Age, Sex, Race, and Hispanic Origin

Population Counts	Total Male	Total Female	Hispanic		Non-Hispanic											
					White		Black		AIAN		Asian		NHOPI		2 or more races	
			Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female
Total Civilian Labor Force	607,898	491,720	53,247	36,098	524,318	430,013	4,044	2,512	5,642	5,113	9,312	9,240	3,497	2,466	7,838	6,278
Not a high school graduate	93,117	64,940	25,139	13,338	61,903	46,849	621	326	1,471	1,101	1,672	1,687	840	347	1,471	1,292
High school graduate (incl. equivalent)	135,993	118,573	12,873	10,082	115,777	102,084	1,086	705	1,869	1,699	1,487	1,685	1,111	928	1,790	1,390
Some college or associate degree	225,604	207,893	11,082	9,355	204,492	189,307	1,582	1,025	1,823	1,884	2,640	2,915	1,142	938	2,843	2,469
Bachelor's degree	98,572	74,784	2,762	2,363	91,649	68,726	566	371	343	307	1,937	1,937	312	235	1,003	845
Graduate or professional degree	54,612	25,530	1,391	960	50,497	23,047	189	85	136	122	1,576	1,016	92	18	731	282
16-19 years	51,329	53,245	5,320	4,011	43,445	46,786	278	263	455	408	657	604	245	270	929	903
Not a high school graduate	33,626	28,912	3,909	2,581	28,125	25,004	145	134	291	230	402	289	138	108	616	566
High school graduate (incl. equivalent)	10,673	10,294	1,071	906	9,084	8,826	84	64	130	121	74	128	59	80	171	169
Some college or associate degree	7,001	14,021	340	520	6,207	12,942	49	65	34	57	181	187	48	82	142	168
Bachelor's degree	29	18	0	4	29	14	0	0	0	0	0	0	0	0	0	0
Graduate or professional degree	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20-34 years	244,456	194,191	27,949	17,232	202,575	165,346	1,906	1,164	2,592	2,400	4,214	3,930	1,747	1,158	3,473	2,961
Not a high school graduate	31,813	16,755	13,047	5,868	16,733	9,438	238	110	560	412	525	387	295	127	415	413
High school graduate (incl. equivalent)	61,035	45,617	7,251	5,285	49,835	37,375	628	344	973	895	783	606	607	391	958	721
Some college or associate degree	107,687	93,850	5,865	4,680	96,590	84,280	691	527	923	982	1,431	1,477	710	553	1,477	1,351
Bachelor's degree	34,334	31,850	1,257	1,058	31,279	29,013	244	163	117	101	897	1,044	131	83	409	388
Graduate or professional degree	9,587	6,119	529	341	8,138	5,240	105	20	19	10	578	416	4	4	214	88
35-39 years	69,198	53,351	6,332	4,501	59,209	45,872	578	299	753	678	1,134	1,110	397	271	795	620
Not a high school graduate	7,874	4,804	2,669	1,324	4,651	3,083	75	48	126	95	152	144	140	20	61	90
High school graduate (incl. equivalent)	16,094	14,373	1,509	1,218	13,853	12,398	99	34	249	249	133	217	60	109	191	148
Some college or associate degree	23,660	22,211	1,411	1,286	21,050	19,970	260	134	290	266	207	265	129	63	313	227
Bachelor's degree	14,101	8,900	503	502	12,801	7,789	144	73	76	31	330	311	68	79	179	115
Graduate or professional degree	7,469	3,063	240	171	6,854	2,632	0	10	12	37	312	173	0	0	51	40
40 years and over	242,915	190,933	13,646	10,354	219,089	172,009	1,282	786	1,842	1,627	3,307	3,596	1,108	767	2,641	1,794
Not a high school graduate	19,804	14,469	5,514	3,565	12,394	9,324	163	34	494	364	593	867	267	92	379	223
High school graduate (incl. equivalent)	48,191	48,289	3,042	2,673	43,005	43,485	275	263	517	434	497	734	385	348	470	352
Some college or associate degree	87,256	77,811	3,466	2,869	80,645	72,115	582	299	576	579	821	986	255	240	911	723
Bachelor's degree	50,108	34,016	1,002	799	47,540	31,910	178	135	150	175	710	582	113	73	415	342
Graduate or professional degree	37,556	16,348	622	448	35,505	15,175	84	55	105	75	686	427	88	14	466	154

Notes: 1) AIAN is American Indian or Alaska Native; 2) NHOPI is Native Hawaiian or Other Pacific Islander; and 3) Hispanic or Latino may be of any race.
 Source: U.S. Census Bureau, Census 2000 Special EEO Tabulation

Educational Attainment of Utah's Civilian Workforce by Age, Sex, Race, and Hispanic Origin

Percent of Each Category Total	Total Male	Total Female	Hispanic		Non-Hispanic											
					White		Black		AIAN		Asian		NHOPI		2 or more races	
			Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female
Total Civilian Labor Force	607,898	491,720	53,247	36,098	524,318	430,013	4,044	2,512	5,642	5,113	9,312	9,240	3,497	2,466	7,838	6,278
Not a high school graduate	15.3%	13.2%	47.2%	36.9%	11.8%	10.9%	15.4%	13.0%	26.1%	21.5%	18.0%	18.3%	24.0%	14.1%	18.8%	20.6%
High school graduate (incl. equivalent)	22.4%	24.1%	24.2%	27.9%	22.1%	23.7%	26.9%	28.1%	33.1%	33.2%	16.0%	18.2%	31.8%	37.6%	22.8%	22.1%
Some college or associate degree	37.1%	42.3%	20.8%	25.9%	39.0%	44.0%	39.1%	40.8%	32.3%	36.8%	28.4%	31.5%	32.7%	38.0%	36.3%	39.3%
Bachelor's degree	16.2%	15.2%	5.2%	6.5%	17.5%	16.0%	14.0%	14.8%	6.1%	6.0%	20.8%	21.0%	8.9%	9.5%	12.8%	13.5%
Graduate or professional degree	9.0%	5.2%	2.6%	2.7%	9.6%	5.4%	4.7%	3.4%	2.4%	2.4%	16.9%	11.0%	2.6%	0.7%	9.3%	4.5%
16-19 years	51,329	53,245	5,320	4,011	43,445	46,786	278	263	455	408	657	604	245	270	929	903
Not a high school graduate	65.5%	54.3%	73.5%	64.3%	64.7%	53.4%	52.2%	51.0%	64.0%	56.4%	61.2%	47.8%	56.3%	40.0%	66.3%	62.7%
High school graduate (incl. equivalent)	20.8%	19.3%	20.1%	22.6%	20.9%	18.9%	30.2%	24.3%	28.6%	29.7%	11.3%	21.2%	24.1%	29.6%	18.4%	18.7%
Some college or associate degree	13.6%	26.3%	6.4%	13.0%	14.3%	27.7%	17.6%	24.7%	7.5%	14.0%	27.5%	31.0%	19.6%	30.4%	15.3%	18.6%
Bachelor's degree	0.1%	0.0%	0.0%	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%
Graduate or professional degree	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
20-34 years	244,456	194,191	27,949	17,232	202,575	165,346	1,906	1,164	2,592	2,400	4,214	3,930	1,747	1,158	3,473	2,961
Not a high school graduate	13.0%	8.6%	46.7%	34.1%	8.3%	5.7%	12.5%	9.5%	21.6%	17.2%	12.5%	9.8%	16.9%	11.0%	11.9%	13.9%
High school graduate (incl. equivalent)	25.0%	23.5%	25.9%	30.7%	24.6%	22.6%	32.9%	29.6%	37.5%	37.3%	18.6%	15.4%	34.7%	33.8%	27.6%	24.3%
Some college or associate degree	44.1%	48.3%	21.0%	27.2%	47.7%	51.0%	36.3%	45.3%	35.6%	40.9%	34.0%	37.6%	40.6%	47.8%	42.5%	45.6%
Bachelor's degree	14.0%	16.4%	4.5%	6.1%	15.4%	17.5%	12.8%	14.0%	4.5%	4.2%	21.3%	26.6%	7.5%	7.2%	11.8%	13.1%
Graduate or professional degree	3.9%	3.2%	1.9%	2.0%	4.0%	3.2%	5.5%	1.7%	0.7%	0.4%	13.7%	10.6%	0.2%	0.3%	6.2%	3.0%
35-39 years	69,198	53,351	6,332	4,501	59,209	45,872	578	299	753	678	1,134	1,110	397	271	795	620
Not a high school graduate	11.4%	9.0%	42.2%	29.4%	7.9%	6.7%	13.0%	16.1%	16.7%	14.0%	13.4%	13.0%	35.3%	7.4%	7.7%	14.5%
High school graduate (incl. equivalent)	23.3%	26.9%	23.8%	27.1%	23.4%	27.0%	17.1%	11.4%	33.1%	36.7%	11.7%	19.5%	15.1%	40.2%	24.0%	23.9%
Some college or associate degree	34.2%	41.6%	22.3%	28.6%	35.6%	43.5%	45.0%	44.8%	38.5%	39.2%	18.3%	23.9%	32.5%	23.2%	39.4%	36.6%
Bachelor's degree	20.4%	16.7%	7.9%	11.2%	21.6%	17.0%	24.9%	24.4%	10.1%	4.6%	29.1%	28.0%	17.1%	29.2%	22.5%	18.5%
Graduate or professional degree	10.8%	5.7%	3.8%	3.8%	11.6%	5.7%	0.0%	3.3%	1.6%	5.5%	27.5%	15.6%	0.0%	0.0%	6.4%	6.5%
40 years and over	242,915	190,933	13,646	10,354	219,089	172,009	1,282	786	1,842	1,627	3,307	3,596	1,108	767	2,641	1,794
Not a high school graduate	8.2%	7.6%	40.4%	34.4%	5.7%	5.4%	12.7%	4.3%	26.8%	22.4%	17.9%	24.1%	12.0%	14.4%	12.4%	
High school graduate (incl. equivalent)	19.8%	25.3%	22.3%	25.8%	19.6%	25.3%	21.5%	33.5%	28.1%	26.7%	15.0%	20.4%	34.7%	45.4%	17.8%	19.6%
Some college or associate degree	35.9%	40.8%	25.4%	27.7%	36.8%	41.9%	45.4%	38.0%	31.3%	35.6%	24.8%	27.4%	23.0%	31.3%	34.5%	40.3%
Bachelor's degree	20.6%	17.8%	7.3%	7.7%	21.7%	18.6%	13.9%	17.2%	8.1%	10.8%	21.5%	16.2%	10.2%	9.5%	15.7%	19.1%
Graduate or professional degree	15.5%	8.6%	4.6%	4.3%	16.2%	8.8%	6.6%	7.0%	5.7%	4.6%	20.7%	11.9%	7.9%	1.8%	17.6%	8.6%

Notes: 1) AIAN is American Indian or Alaska Native; 2) NHOPI is Native Hawaiian or Other Pacific Islander; and 3) Hispanic or Latino may be of any race.
 Source: U.S. Census Bureau, Census 2000 Special EEO Tabulation

Highlights from the 2004 Economic Report to the Governor

The 2004 *Economic Report to the Governor* was released to the public on January 8th. Published annually, this report is the principal source of data, research, and analysis about the Utah economy. It includes a national and state economic outlook and a summary of state government economic development activities. It also presents an analysis of economic activity based on the standard indicators and a more detailed review of industries and issues of particular interest.

Utah's Economy

Utah's economy improved only slightly in 2003 due to the lingering effects of the national slowdown, the bursting of the technology bubble, and the completion of the 2002 Olympic Winter Games. Utah's personal income growth of 2.0% was the weakest since 1954. Back-to-back years of employment contraction mark the worst job losses in Utah in 57 years. Current expectations are that employment growth in Utah and the U.S. will resume at a modest pace in 2004.

Still, record high defense spending and near record new housing starts helped steady the Utah economy during 2003. In terms of value, Utah experienced its best year ever in 2003 due to the lowest mortgage rates in 50 years. This occurred despite poor job growth and modest net in-migration. According to the latest Bureau of Labor Statistics data, Utah's economy continued to outperform the nation and registered positive year-over job growth as recently as October and November of 2003.

International, National, and Regional Context

With the U.S. leading the way by importing products from around the world at a record pace, global economic prospects improved during 2003 and the outlook is good for 2004. As Operations Enduring and Iraqi Freedom progress, and the geopolitical situation stabilizes, trade and growth will strengthen economies throughout the world.

Population

Utah's population grew 2.0% during 2003, about twice the national rate. Despite a flat economy, net migration was almost 10,000. Population growth appears to have entered a slower period that may extend for several years, in contrast to the 1990s, where growth exceeded 2.5% in most years, topping 3.0% in 1991, 1992, and 1994. While the current slower growth period reflects less economic opportunity, it also presents less challenge in terms of transportation infrastructure, housing, and critical lands preservation.

Jobs and Wages

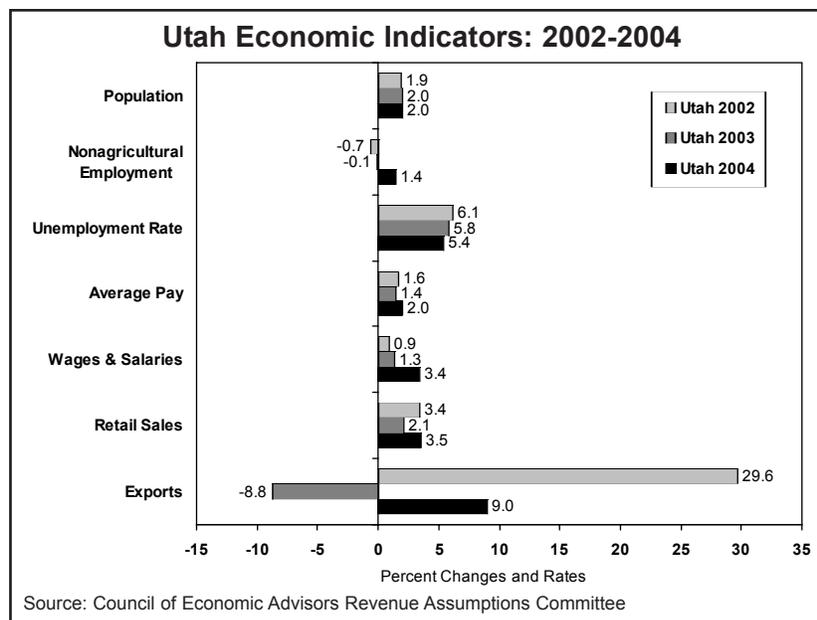
As 2003 closed, Utah's economy began to recover from its worst slump since 1954. After falling by almost 8,000 in 2002, nonfarm employment fell by another 1,000 during 2003. The recession that began in 2001 is Utah's only post war recession in which average annual employment fell two years in a row. On a bright note, although jobs for the year during 2003 are down, on a monthly basis, employment began to grow during the last half of 2003. With the positive turn at the end of 2003, employment is expected to grow a modest 1.4% during 2004. With employment growing, the unemployment rate is expected to fall from 5.8% in 2003 to 5.4% in 2004.

Utah's average annual nonagricultural pay was \$30,500 during 2003, up 1.4% from 2002. After seven years in row of solid gains in which wages grew faster than inflation, wages matched inflation during 2002, but wages grew less than

inflation during 2003. With the economy growing again, wages should outpace inflation during 2004 and the standard of living in Utah should resume the upward trend of the 1990s.

Industry Focus

Economic performance varied across sectors during 2003. Given the ongoing geopolitical situation, it is not surprising that defense spending was up. Minerals were up as well. Other sectors range from mixed to down.



Defense. Utah's defense industry continued with solid growth during 2003, as Northrup Grumman expanded at Hill Air Force Base, and as Operations Enduring and Iraqi Freedom proceeded. At this point, U.S. defense spending appears to be on an upward track at least through 2010, which will keep Utah's defense sector growing. Defense spending in Utah during 2002 totaled \$2.47 billion, up 5.0% from 2001.

Minerals. At \$1.9 billion during 2003, the value of mineral production in Utah was increased over \$60 million, or almost 3% from 2002. Improving metal prices, increasing production and the improving global economy drove the increase during 2003. Contributions from the major industry segments were: base metals (\$715 million), industrial minerals (\$586 million), coal (\$445 million), and precious metals (\$133 million). The Utah Geological Survey estimates that 82 Large Mines (including coal) and 113 Small Mines will report production in 2003, compared to 81 Large Mines and 94 Small Mines in 2002. Utah contributed about 3% of the U.S. total value of non-fuel minerals production in 2002. Excluding copper, metals production and prices should be up in 2004.

Highlights from the 2004 Economic Report to the Governor

Construction. The lowest interest rates in a half century powered construction to a record high of \$4.5 billion permitted value. Most of this relatively strong performance is due to the residential sector (new homes and apartments). New home construction in 2003 totaled 16,500 units, ranking second to the all-time high of 17,400 new homes in 1977. Reinforcing the residential sector, non-residential permit values increased over 10% in 2003 to \$1.0 billion. While the value of construction is holding up well, employment is not. Since peaking at 72,800 in 1999, construction employment declined for the fourth year in a row to 67,100 during 2003, down almost 10% from the 1999 high.

Energy. Utah's 2003 crude oil production of almost 13 million barrels was about one-third of the 1985 peak, when 41 million barrels were produced. This decline can only be offset with new well drilling. Given the trend in drilling, Utah's consumers will increasingly have to look elsewhere for both crude oil and other petroleum products. On the other hand, Utah's natural gas capacity has risen steadily over the years, primarily due to an increase in its coal bed methane fields. Actual sales of natural gas from Utah fields during 2003, 245 billion cubic feet, were near the 2002 record of 247 billion cubic feet. Economic recession, combined with mild winter weather, and increasing prices slowed the rise in Utah's demand for energy during 2003.

Tourism. The lingering effects of 9/11, Operation Iraqi Freedom, SARS, and difficult economic conditions presented a challenging set of circumstances for Utah's tourism sector in 2003. Overall, visitation was down just slightly from 2002, which, considering the boost to visitation from the 2002 Olympic Winter Games, means 2003 was a solid year for tourism. An increase in destination skiers and gains in the restaurant sector helped the amount of spending and employment related to travel and tourism to improve slightly. A successful 2002 Olympic Winter Games played a significant roll in attracting more destination skiers to the state in 2003. As the economy improves, the amount of tourism, travel, and recreation in Utah should increase.

Agriculture. A drought not seen since the dust-bowl of the 1930s continued to hamper farming during 2003. Farm sales declined \$60 million from \$1.12 billion in 2001 to \$1.06 billion in 2002, with this down trend continuing into 2003. The lack of moisture limited production of crops and forage in most areas of the state in 2003. For example, barley production in Utah was projected to decline by 28% from 2002 to 2003. Some dry farmers have found it unprofitable to either plant or harvest wheat. Ranchers have also been forced to sell cows as a result of reductions in the amount of forage that grazing lands have produced. The low levels of production resulted in significant disaster payments to farmers. USDA's Farm Service Agency reported that more than \$9 million had been paid to Utah producers as of October 2, 2003 for crop losses that occurred in 2001 or 2002. Production declines, however, were partially offset by higher prices for some commodities.

Many livestock producers, for example, were able to sell calves at all time high prices during the fall of 2003. Grain prices have also strengthened. In contrast to rising prices for livestock and grains, hay prices declined from record levels during 2003.

High Technology. During 2003, Utah's high technology sector continued a decline that began in 2001. From January 2001 through June 2003, Utah's high-tech sector lost 9,929 jobs, a drop of about 15%. Companies that engage in computer system design and computer and peripheral equipment manufacturers have been hardest hit, posting job losses totaling 5,500. However, the rate at which high technology jobs are declining appears to be slowing. Average employment in the high-tech sector for the first six months of 2003 is just 3.3% lower than average employment during the same period last year. While high technology will rebound as the overall economy improves, it may take several years before employment returns to the peak of 2000.

Exports. Utah's exports fell 8.8% during 2003, from \$4.5 billion to \$4.1 billion. Utah's merchandise exports have been at or above \$3.0 billion since 1997 and above \$4.0 billion since 2002. Air shipments of gold to Switzerland and the United Kingdom accounted for almost 40% of the total during 2003. Signaling the beginning of a new trend in the global economy, Utah's exports to China exceeded \$100 million for the first time ever, ranking China the sixth-largest market for Utah exports. As the world economic recovery strengthens during 2004, Utah's exports should begin to grow.

Looking Ahead

As the recovery strengthens, Utah's economy should resume moderate growth during 2004. After two consecutive years of job losses, employment should grow 1.4% during 2004. The unemployment rate is expected to fall from the current 5.8% to 5.4%, levels not seen since the early 1990s. Resuming a trend interrupted in 2003, wages will increase faster than inflation during 2004.

Continued migration into Utah throughout the recession suggests that Utah will show strong growth in the long run. Strong international migration brings an even more diverse economy and society for Utah. Current expectations are that the Greater Wasatch will add at least 1 million residents by 2030, giving the urban area a population of more than 3 million, the current size of the Phoenix metropolitan area. REMI, Utah's new projections tool, will assist analysts to better anticipate and understand growth challenges.

Additional Information

For more information on the *2004 Economic Report to the Governor*, visit the Demographic and Economic Analysis website at www.governor.utah.gov/dea, or contact the State Data Center at (801) 538-1036.



Affiliates Corner: Economic Development Corporation of Utah



In the mid-1980s, Utah's economic news focused on the state's increasing jobless rate and how more people were leaving the state than arriving. During this time, the Committee of 100 was an economic development program housed with the Salt Lake Area Chamber of Commerce. The Committee was comprised of local companies that provided volunteer staff to coordinate the economic development efforts of Utah.

In 1987, local businesses and government leaders envisioned a new corporation that would pool the resources of business leaders and local elected officials whose communities were competing against each other. Due to this vision, the Economic Development Corporation of Utah (then called the Utah Economic Development Corporation) was incorporated, creating the first statewide public/private partnership in the United States for economic development.

The mission of The Economic Development Corporation of Utah (EDCU) is to be a catalyst for increased capital investment and quality job growth in Utah. The Economic Development Corporation of Utah is an investor-based public/private partnership working with government and private industry to promote the state of Utah. This partnership includes more than 200 private-sector businesses and organizations, municipalities, counties, and chambers of commerce, all working towards the common goal of increasing the number of quality jobs and the capital investment in Utah.

EDCU specializes in being a comprehensive source of critical economic data, and key public/private contacts in order to facilitate the recruitment of out-of-state companies and to spur the development and expansion of local businesses.

Our core objectives are to:

- Recruit targeted businesses from the Americas to invest throughout the state of Utah
- Act as a proactive service agency for all national and international inquiries
- Assist Utah businesses with expansion and retention efforts
- Identify and document economic development research data in order to encourage capital investment and job creation in Utah
- Create and/or enhance a positive image of Utah as a location for business investment among regional, national, and international corporate decision makers
- Position EDCU as a comprehensive resource for economic information and key public/private contacts

Corporate Recruitment

The Corporate Recruitment team works with companies that are considering Utah for expansion or relocation. In addition to assisting businesses that contact the EDCU directly, the corporate recruitment team targets specific industries through a variety of outreach initiatives, including marketing trips, direct mail campaigns, and networking opportunities.

Existing Business

EDCU's Existing Business Department assists both public and private sector groups with their growth and expansion needs. This objective is accomplished by providing resource information that includes financial assistance, real estate information, job training assistance, small business assistance opportunities, in state supplier and vendor contacts, and contacts with EDCU investors.

Research

The Research Department is responsible for compiling the most up-to-date information and statistics on statewide business trends. The research team also compiles customized research data including operating cost analyses, community economic impact analyses, site consultant surveys, county profiles, and targeted industry profiles.

Marketing and Communications

EDCU's Marketing and Communications Department creates and enhances a positive image of Utah as a location for business investment among regional, national, and international corporate decision makers. In addition, the department oversees the positioning of EDCU as a comprehensive resource for economic information and key public/private contacts, and provides marketing support to EDCU Client Services, Existing Business, Administrative Services, and the Research Data Center.

Administrative Services

EDCU's Administrative Services Department provides investor-related initiatives, financial services, and operations management for the organization.

RECENTLY ANNOUNCED PROJECTS

Qwest Telecommunications DSL Center

- Call Center, Salt Lake City
- 156 jobs, \$5 million capital investment

Local Voice

- Software Developer, Salt Lake City
- 10 jobs, 2,500 SF

Schreiber Foods

- Cream Cheese Processing, Logan
- 95 jobs, 35,000 SF
- \$24,000,000 capital investment

Siebel Systems

- 250-300 jobs
- Senior IT staff relocation

THE ECONOMIC DEVELOPMENT
CORPORATION OF UTAH

ACTUAL AND ESTIMATED INDICATORS FOR UTAH AND THE U.S.: NOVEMBER 2003

ECONOMIC INDICATORS	UNITS	2001	2002	2003	2004	2005	% CHG	% CHG	% CHG	% CHG
		ACTUAL	ESTIMATE	FORECAST	FORECAST	FORECAST	CY01-02	CY02-03	CY03-04	CY04-05
PRODUCTION AND SPENDING										
U.S. Real Gross Domestic Product	Billion Chained \$96	9,214.5	9,439.9	9,713.7	10,131.3	10,496.1	2.4	2.9	4.3	3.6
U.S. Real Personal Consumption	Billion Chained \$96	6,377.2	6,576.0	6,779.9	7,030.7	7,262.7	3.1	3.1	3.7	3.3
U.S. Real Fixed Investment	Billion Chained \$96	1,627.4	1,577.3	1,643.5	1,743.8	1,817.0	-3.1	4.2	6.1	4.2
U.S. Real Defense Spending	Billion Chained \$96	366.0	400.0	440.8	465.5	470.1	9.3	10.2	5.6	1.0
U.S. Real Exports	Billion Chained \$96	1,076.1	1,058.8	1,072.6	1,169.1	1,305.9	-1.6	1.3	9.0	11.7
Utah Exports (NAICS, Census)	Million Dollars	3,506.4	4,542.7	4,142.9	4,515.8	5,044.2	29.6	-8.8	9.0	11.7
Utah Coal Production	Million Tons	27.0	25.3	23.6	23.4	23.1	-6.4	-6.7	-1.0	-1.0
Utah Oil Production Sales	Million Barrels	15.3	13.8	13.0	12.2	11.5	-9.8	-5.8	-6.2	-5.7
Utah Natural Gas Production Sales	Billion Cubic Feet	247.1	247.5	245.2	247.7	250.1	0.2	-0.9	1.0	1.0
Utah Copper Mined Production	Million Pounds	689.4	573.6	617.9	630.0	640.0	-16.8	7.7	2.0	1.6
SALES AND CONSTRUCTION										
U.S. New Auto and Truck Sales	Millions	17.1	16.8	16.6	17.0	17.2	-1.9	-1.3	2.8	1.2
U.S. Housing Starts	Millions	1.60	1.71	1.79	1.72	1.61	6.9	4.7	-3.9	-6.4
U.S. Residential Investment	Billion Dollars	444.8	471.9	529.9	538.4	521.7	6.1	12.3	1.6	-3.1
U.S. Nonresidential Structures	Billion Dollars	324.5	269.3	256.6	270.5	305.4	-17.0	-4.7	5.4	12.9
U.S. Repeat-Sales House Price Index	1980Q1=100	258.9	277.9	296.8	311.3	320.7	7.3	6.8	4.9	3.0
U.S. Existing S.F. Home Prices (NAR)	Thousand Dollars	147.8	158.3	169.1	177.3	182.7	7.1	6.8	4.9	3.0
U.S. Retail Sales	Billion Dollars	3,471.8	3,578.2	3,777.6	3,944.1	4,085.2	3.1	5.6	4.4	3.6
Utah New Auto and Truck Sales	Thousands	83.6	92.1	89.7	92.4	93.5	10.2	-2.6	3.0	1.2
Utah Dwelling Unit Permits	Thousands	19.7	19.5	22.5	21.8	21.0	-0.9	15.4	-3.0	-3.8
Utah Residential Permit Value	Million Dollars	2,352.7	2,491.6	3,000.0	2,920.0	2,820.0	5.9	20.4	-2.7	-3.4
Utah Nonresidential Permit Value	Million Dollars	969.8	897.0	775.0	800.0	1,000.0	-7.5	-13.6	3.2	25.0
Utah Additions, Alterations and Repairs	Million Dollars	562.8	392.9	475.0	450.0	450.0	-30.2	20.9	-5.3	0.0
Utah Repeat-Sales House Price Index	1980Q1=100	249.2	253.7	261.6	268.9	275.6	1.8	3.1	2.8	2.5
Utah Existing S.F. Home Prices (NAR)	Thousand Dollars	147.6	148.8	153.4	157.7	161.7	0.8	3.1	2.8	2.5
Utah Taxable Retail Sales	Million Dollars	17,748	18,356	18,741	19,304	19,994	3.4	2.1	3.0	3.6
DEMOGRAPHICS AND SENTIMENT										
U.S. July 1st Population (BEA, Census)	Millions	284.8	287.4	289.9	292.6	295.2	0.9	0.9	0.9	0.9
U.S. Consumer Sentiment of U.S. (UoM)	1966=100	89.2	89.6	87.3	92.4	92.1	0.4	-2.6	5.8	-0.3
Utah July 1st Population (UPEC)	Thousands	2,296	2,339	2,385	2,433	2,480	1.9	2.0	2.0	1.9
Utah Net Migration (UPEC)	Thousands	14.2	7.4	9.9	10.6	9.6	na	na	na	na
Utah July 1st Population (Census)	Thousands	2,279	2,316	2,362	2,409	2,456	1.6	2.0	2.0	1.9
PROFITS AND RESOURCE PRICES										
U.S. Corporate Before Tax Profits	Billion Dollars	670.2	665.2	770.0	869.6	1,107.8	-0.7	15.8	12.9	27.4
U.S. Before Tax Profits Less Fed. Res.	Billion Dollars	642.3	642.3	749.7	850.5	1,087.5	0.0	16.7	13.4	27.9
U.S. Oil Refinery Acquisition Cost	\$ Per Barrel	23.0	24.0	28.3	22.4	22.9	4.3	17.9	-20.8	2.2
U.S. Coal Price Index	1982=100	96.3	99.8	98.1	96.5	97.9	3.6	-1.7	-1.6	1.5
Utah Coal Prices	\$ Per Short Ton	17.8	18.5	18.9	18.7	18.5	4.0	2.1	-1.0	-1.0
Utah Oil Prices	\$ Per Barrel	24.1	23.9	29.2	28.6	28.0	-0.9	22.2	-2.0	-2.0
Utah Natural Gas Prices	\$ Per MCF	3.52	2.30	4.10	4.14	4.18	-34.7	78.3	1.0	1.0
Utah Copper Prices	\$ Per Pound	0.72	0.71	0.82	0.94	0.92	-1.4	15.1	15.0	-2.1
INFLATION AND INTEREST RATES										
U.S. CPI Urban Consumers (BLS)	1982-84=100	177.1	179.9	184.0	186.5	190.0	1.6	2.3	1.4	1.9
U.S. GDP Chained Price Indexes	1996=100	109.4	110.7	112.4	114.2	116.3	1.2	1.5	1.6	1.8
U.S. Federal Funds Rate	Percent	3.89	1.67	1.13	1.07	1.86	na	na	na	na
U.S. 3-Month Treasury Bills	Percent	3.43	1.61	1.02	1.03	1.72	na	na	na	na
U.S. T-Bond Rate, 10-Year	Percent	5.02	4.61	4.04	4.83	5.47	na	na	na	na
30 Year Mortgage Rate (FHLMC)	Percent	6.97	6.54	5.89	6.56	6.89	na	na	na	na
EMPLOYMENT AND WAGES										
U.S. Establishment Employment (BLS)	Millions	131.8	130.4	130.0	131.5	134.4	-1.1	-0.3	1.1	2.2
U.S. Average Annual Pay (BLS)	Dollars	36,214	36,947	37,830	39,311	40,846	2.0	2.4	3.9	3.9
U.S. Total Wages & Salaries (BLS)	Billion Dollars	4,774	4,817	4,918	5,169	5,490	0.9	2.1	5.1	6.2
Utah Nonagricultural Employment (WS)	Thousands	1,081.7	1,073.7	1,072.8	1,087.7	1,112.7	-0.7	-0.1	1.4	2.3
Utah Average Annual Pay (WS)	Dollars	29,639	30,112	30,537	31,157	31,874	1.6	1.4	2.0	2.3
Utah Total Nonagriculture Wages (WS)	Million Dollars	32,060	32,333	32,760	33,890	35,467	0.9	1.3	3.4	4.7
INCOME AND UNEMPLOYMENT										
U.S. Personal Income (BEA)	Billion Dollars	8,677	8,891	9,176	9,653	10,193	2.5	3.2	5.2	5.6
U.S. Unemployment Rate (BLS)	Percent	4.8	5.8	6.0	6.0	5.8	na	na	na	na
Utah Personal Income (BEA)	Million Dollars	54,764	55,953	57,142	59,436	62,051	2.2	2.1	4.0	4.4
Utah Unemployment Rate (WS)	Percent	4.4	6.1	5.8	5.4	5.3	na	na	na	na

Source: Council of Economic Advisors' Revenue Assumptions Committee.

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The Demographic and Economic Analysis (DEA) section supports the mission of the Governor's Office of Planning and Budget to improve decision making by providing economic and demographic data and analysis to the governor and to individuals from state agencies, other government entities, businesses, academia, and the public. As part of this mission, DEA functions as the lead agency in Utah for the U.S. Census Bureau's State Data and Business and Industry Data Center (SDC/BIDC) programs. While the 34 SDC and BIDC affiliates listed in this newsletter have specific areas of expertise, they can also provide assistance to data users in accessing Census and other data sources.

**State Data Center
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For a free subscription to this quarterly newsletter, and for assistance accessing other demographic and economic data, call the State Data Center. This newsletter and other data are available via the Internet at DEA's web site:

www.governor.utah.gov/dea