Winter 2011

Utah Data Guide

A Newsletter For Data Users

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

2011 Economic Outlook

The *2011 Economic Outlook* is the first publication in what will become an annual companion piece to the *Economic Report to the Governor* series, which will now be published in the fall. Through the last two decades, the Economic Report to the Governor has served as the preeminent source for data, research, and analysis about the Utah economy. The *Economic Outlook* focuses on an estimated summary of the previous year and a forecast for the forthcoming year.

National Outlook

After its largest contraction since the 1930s, the U.S economy began growing during the second quarter of 2009. Officially, the recession that began in December 2007 ended in June 2009. The recovery for gross domestic product (GDP), however, has progressed more rapidly than for employment. Despite monthly private sector job gains throughout 2010, total employment at the end of the year was still more than 7 million below its peak. Because this recession started with unprecedented and unsustainable debt levels, the resolution of bad loans will be time-consuming, which will hinder job creation. The outlook for 2011 calls for the recovery to continue at a tempered pace.

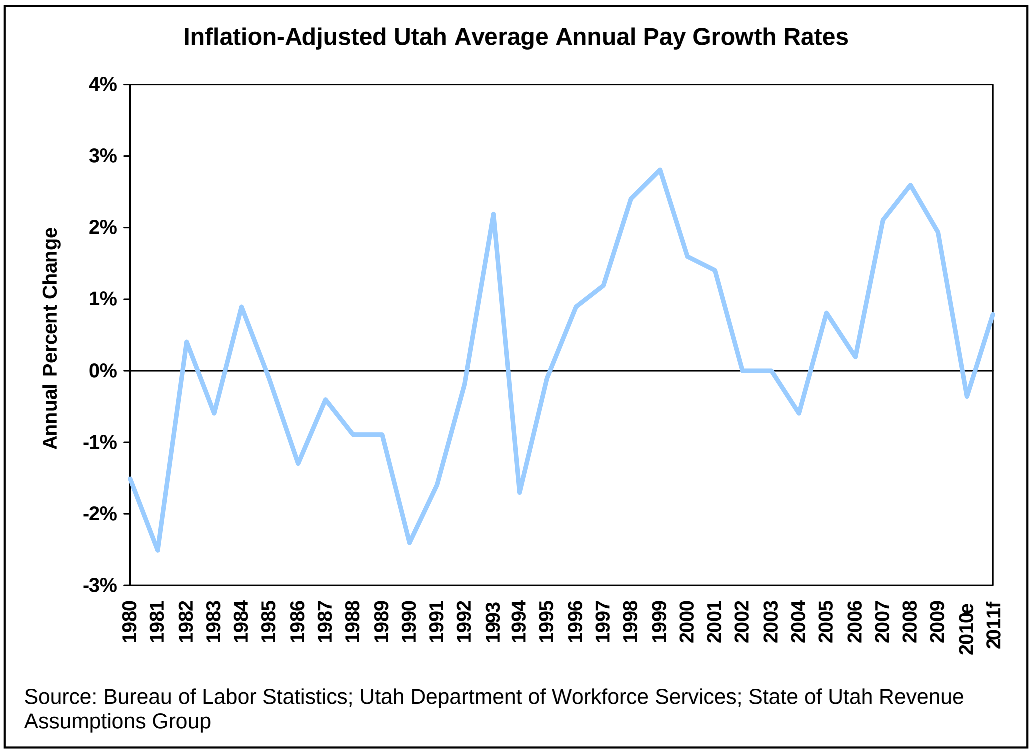
Utah Outlook

Utah fared better than the nation during the recession, and is poised to lead the U.S. into the recovery. Heading into the downturn, Utah's unemployment rate was less than 3.0%, which spurred large amounts of in-migration. During the expansion following the 2001 recession, national companies looking for western production and distribution sites viewed Salt Lake at the cross-roads of I-15 and I-80, as well as the entire I-15 corridor from Tremonton to St. George, as a natural location to do business. When the U.S. economy slowed, business expansion in Utah declined, local unemployment increased and in-migration fell off from a high of about 40,000 during 2007 to about 10,000 during 2010. The expectation of a tempered national recovery limits the state's growth outlook, though Utah is still expected to expand more rapidly than the nation.

Employment

Like every other state in the nation, Utah's employment situation was severely impacted by the recession. Signs of recovery began to emerge in 2010—consecutive monthly declined halted and the rate of increase in the unemployment rate slowed—but the average annual employment level for the year was an estimated 8,700 lower than in 2009 (the loss was 63,800 between 2008 and 2009). The unemployment rate rose to 7.6%, over 2.0% lower than the national rate but still the highest unemployment rate in Utah in more than 25 years.

By the end of 2010, most industries had passed their low points and began to show employment growth. Those industries posting meas-



Source: Bureau of Labor Statistics; Utah Department of Workforce Services; State of Utah Revenue Assumptions Group

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urable gains in average annual employment between 2009 and 2010 were professional and business services and education and health services.

Utah Taxable Sales

Taxable sales are comprised of three major components: retail trade, business investments and utility taxable sales, and taxable services. In 2010, total taxable sales in Utah increased by 0.8% to an estimated $44.8 billion. After two years of decline in taxable sales, 2010 was the first year of positive change.

Tax Collections

General and Education Fund (GF/EF) revenue for Fiscal Year 2010 fell 8.1% over Fiscal Year 2009. For Fiscal Year 2010, total collections reached $4,193.6 million, $367.8 million less than prior year collections of $4,561.4 million. The decline is a continued reflection of the recent economic recession, but shows moderation in the decline. In Fiscal Year 2009, GF/EF revenue declined 12.5% as the state lost $651.5 million in tax collections. This marks the third consecutive year of revenue declines, as collections also fell 1.8% in FY2008.

Exports

Improving economic conditions in Utah, the nation, and around the globe were reflected in Utah's production and export levels through 2009 and 2010. Utah's total exports rose from $10.3 billion in 2009 to an estimated $14.1 billion in 2010, an increase of 36.0%. Exports have been above $4.0 billion since 2002 and above $6.0 billion since 2006. With the expectations of an improved economy in 2011, export levels are forecast to increase to $15.3 billion.

Public Education

In 2010, there were an estimated 576,335 students in Utah's public education system, an increase of 11,044 students or 2.3% over 2009. The school-age population will continue to constitute approximately 20% of the state's population in 2011. An estimated 14,754 new students are expected to enter the public education system in 2011, an increase of 2.6%.

Higher Education

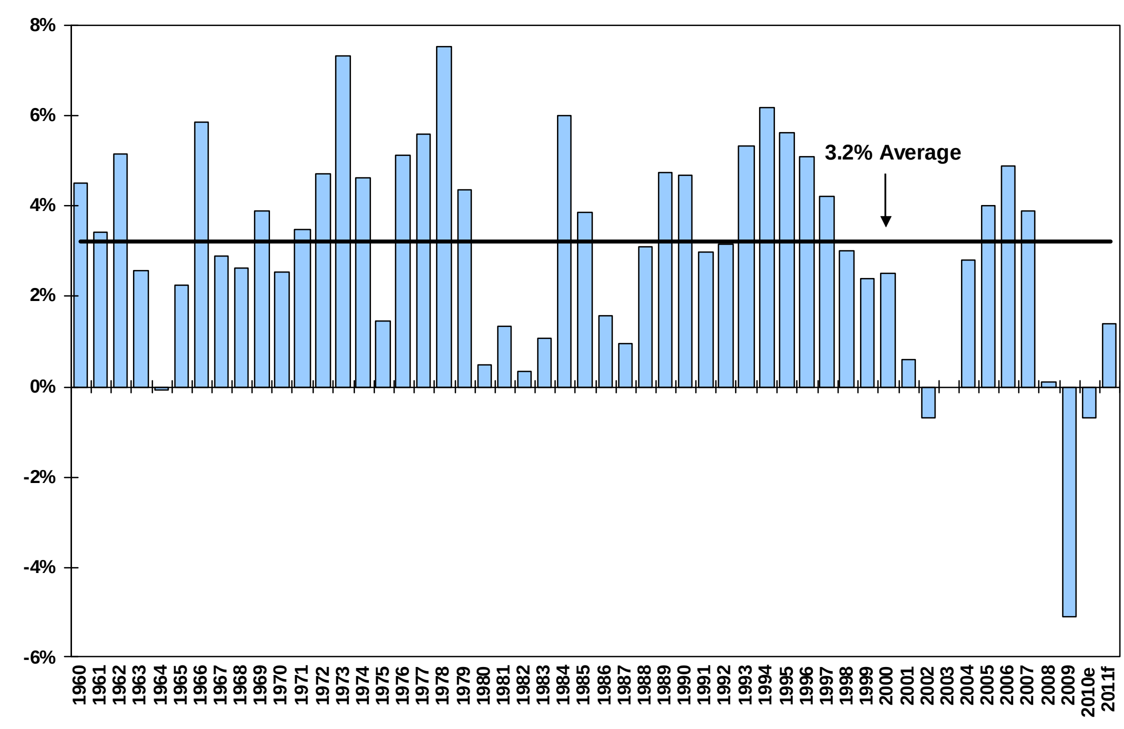
Fall 2010 enrollment was 173,017 or a 4.9% increase from the previous year. While the growth in 2010 is not a high as the two previous years, it marks the third year in a row higher education enrollment has increased from the previous year. With the increased emphasis on higher education, it is expected that the 2011 fall enrollment will increase from 2010.

Economic Development

As Utah and the nation begin to recover from the recent recession, economic development activities picked up during 2010. The Governor's Office of Economic Development (GOED) extended offers to 11 firms to locate to or expand operations in Utah. Companies making announcements of plans included high tech, aerospace manufacturing, software development, and retail. Construction has continued on City Creek Center, with sales starting for some of the residential units. Ground was broken for the first building in the Falcon Hill development at Hill Air Force Base. Other projects which were delayed have been reactivated, such as Station Park in Farmington where building permits have been issued for a theater complex and retail establishments. The Utah Science and Technology and Research Initiative (USTAR) completed the research building at Utah State University and continues to attract researchers and spin out companies.

Utah rose from second to first place as the best state for doing business according to Forbes Magazine. This recognition, coupled with effective efforts to attract new business to the state and to encourage existing business to expand their operation, bode well for future economic development in Utah.

Utah Nonfarm Employment: Annual Percent Change



Source: Utah Department of Workforce Services e = estimate f = forecast

Agriculture

Agricultural sectors in Utah were more profitable in 2010 compared to 2009, with the exception of the hay sector. Agricultural receipts in 2009 were greater than they had been for the past several years and total cash receipts for 2010 are estimated to have exceed 2009 levels. Cattle, dairy, and hay are the three largest sectors of the Utah agricultural economy, ac-

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counting for 20.5%, 18.0% and 15.4% of cash receipts in 2009. The hog sector accounts for 13.1% and the greenhouse and nursery sector has now grown to 10.1% of agricultural receipts. With cattle and milk prices both increasing in 2010, these two sectors are expected again to be the largest agricultural sectors in 2011.

Construction

In 2010 the value of permit authorized construction in Utah dropped to $3.1 billion, a decline of 10% from the $3.4 billion of 2009. In inflation adjusted dollars, the $3.1 billion in 2010 was the lowest level since 1992. The construction sector is comprised of three subsectors; residential, nonresidential and additions, alterations and repairs. In 2010 the value of residential construction was $1.6 billion followed by $900 million for nonresidential construction and $550 million for addition, alterations and repairs.

Energy

Energy consumption increased across the board in 2010 after experiencing declines in 2009 due to the recession. Also during 2010, crude oil production and electricity generation experienced new growth, while natural gas production declined from 2009-record highs and coal production continued its slide as several mines experienced expected and unexpected delays or shut-downs. Early indications are that 2011 will continue on the path of slow and cautious growth.

Minerals

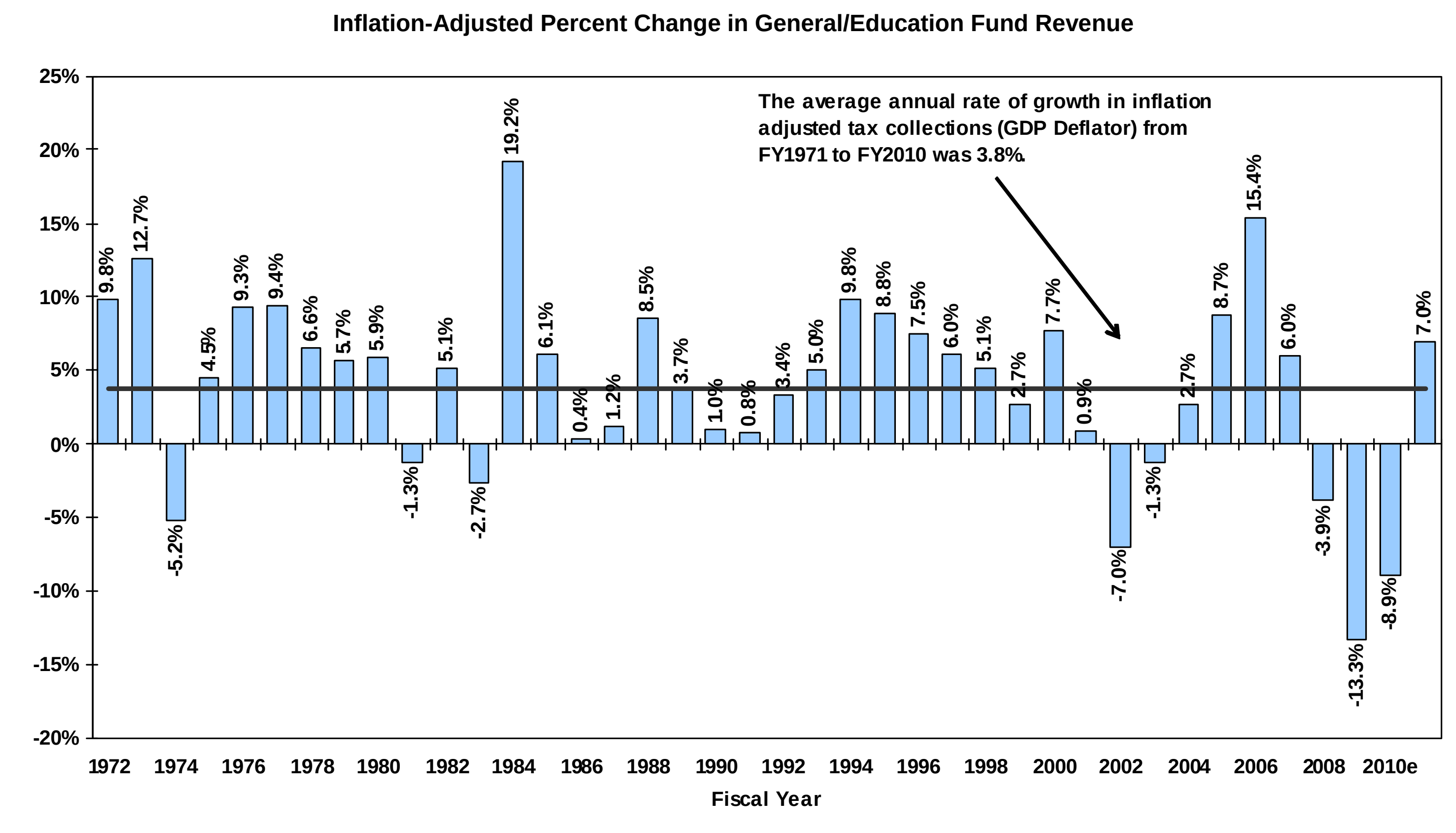
The Utah Geological Survey (UGS) estimates the gross production value of nonfuel mineral commodities and uranium produced in Utah in 2010 totaled $4.34 billion, an increase of about $551 million (15%) over 2009. The estimated nominal value of nonfuel mineral production (excluding uranium) in Utah was $4.28 billion in 2010, approximately $280 million (7%) higher than the $4.0 billion reported by the U.S. Geological Survey (USGS) for 2009. The USGS ranked Utah third among all states in the value of nonfuel mineral production in 2009.

The expected value increase in metals and uranium, respectively comprising 77% and 2% of the total value in 2010, will likely compensate for the predicted stable value of industrial minerals as it did in 2010. Consequently, a modest overall value increase for all nonfuel minerals and uranium may be expected in 2011.

Tourism

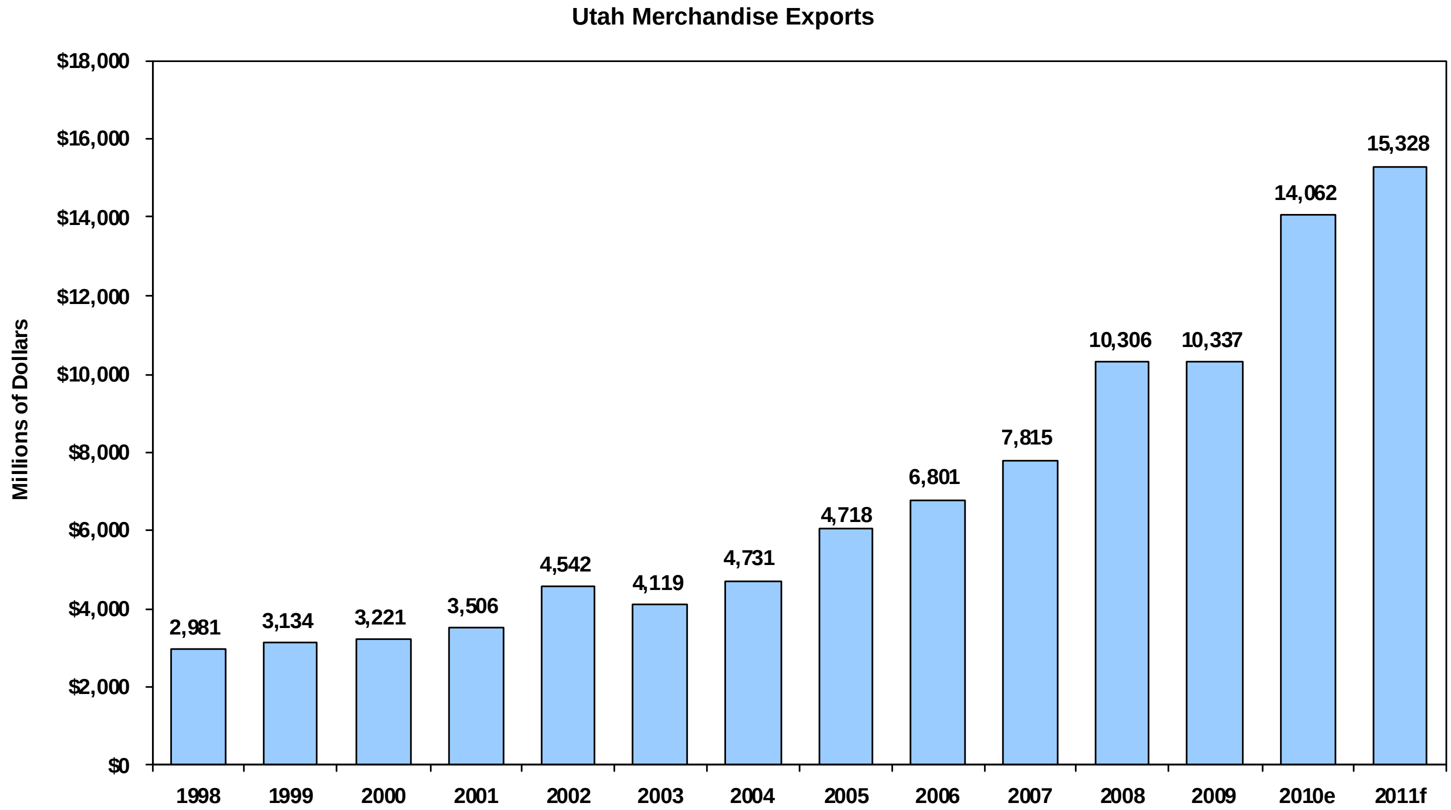
Utah's travel and tourism sector had a positive year in an economically uncertain 2010. Regional and in-state travel is estimated to be up slightly in 2010. The Utah ski industry experienced the fourth best season on record with 4,048,153 skier days. During 2010, for the fourth year in a row, national park visitation was up from the previous year. National park visitation is estimated to be up 1.2% or 6.1 million in 2010. State park visitation is estimated to be up 1.4% with visitation estimated at 4.8 million in 2010.

The *2011 Economic Outlook* is available on the Governor's Office of Planning and Budget's web site at http://www.governor.utah.gov/dea.

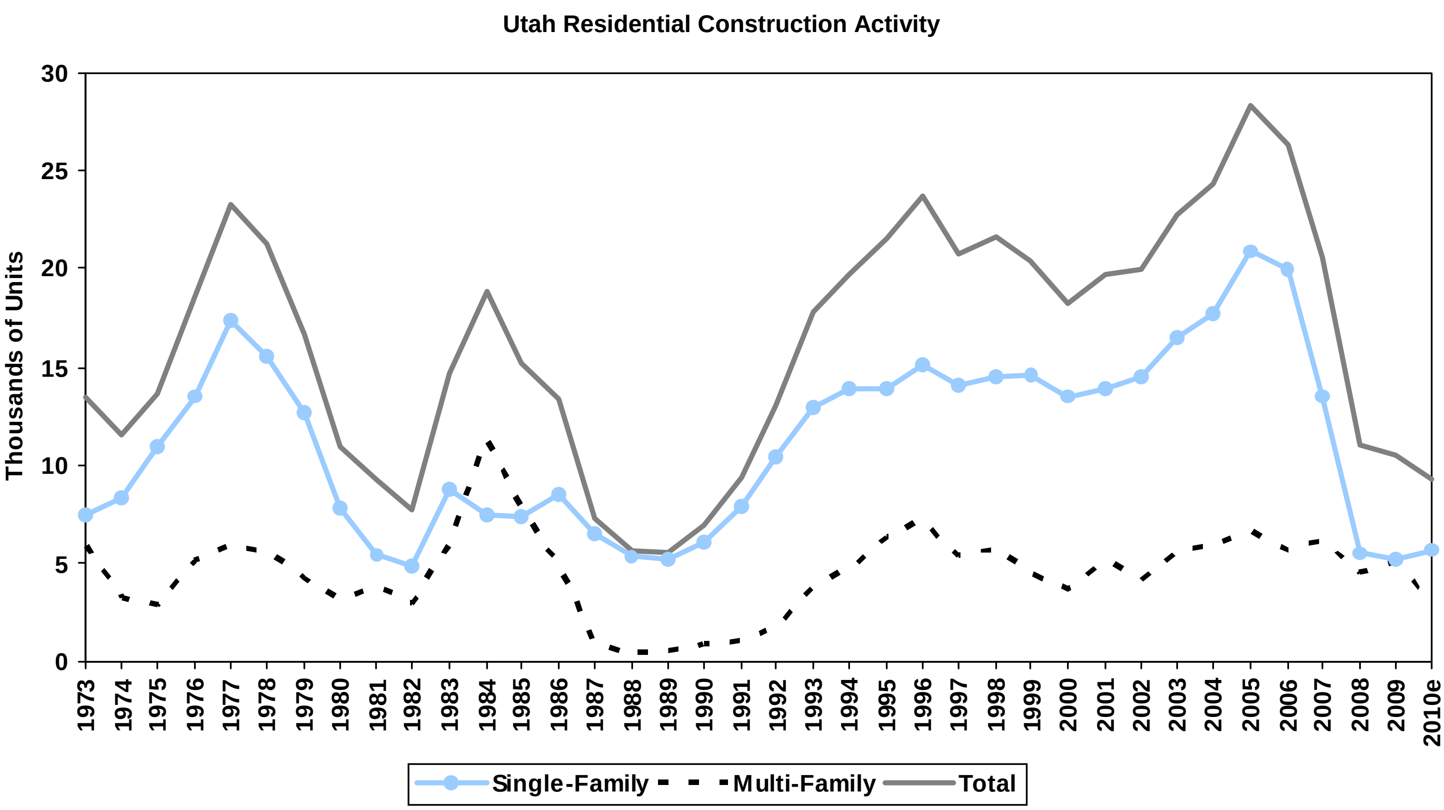


Source: Governor's Office of Planning and Budget f = forecast

2011 Economic Outlook



Source: U.S. Census Bureau e = estimate f = forecast



Source: University of Utah, David Eccles School of Business, Bureau of Economic and Business Research

2010 Census National and State Population Counts

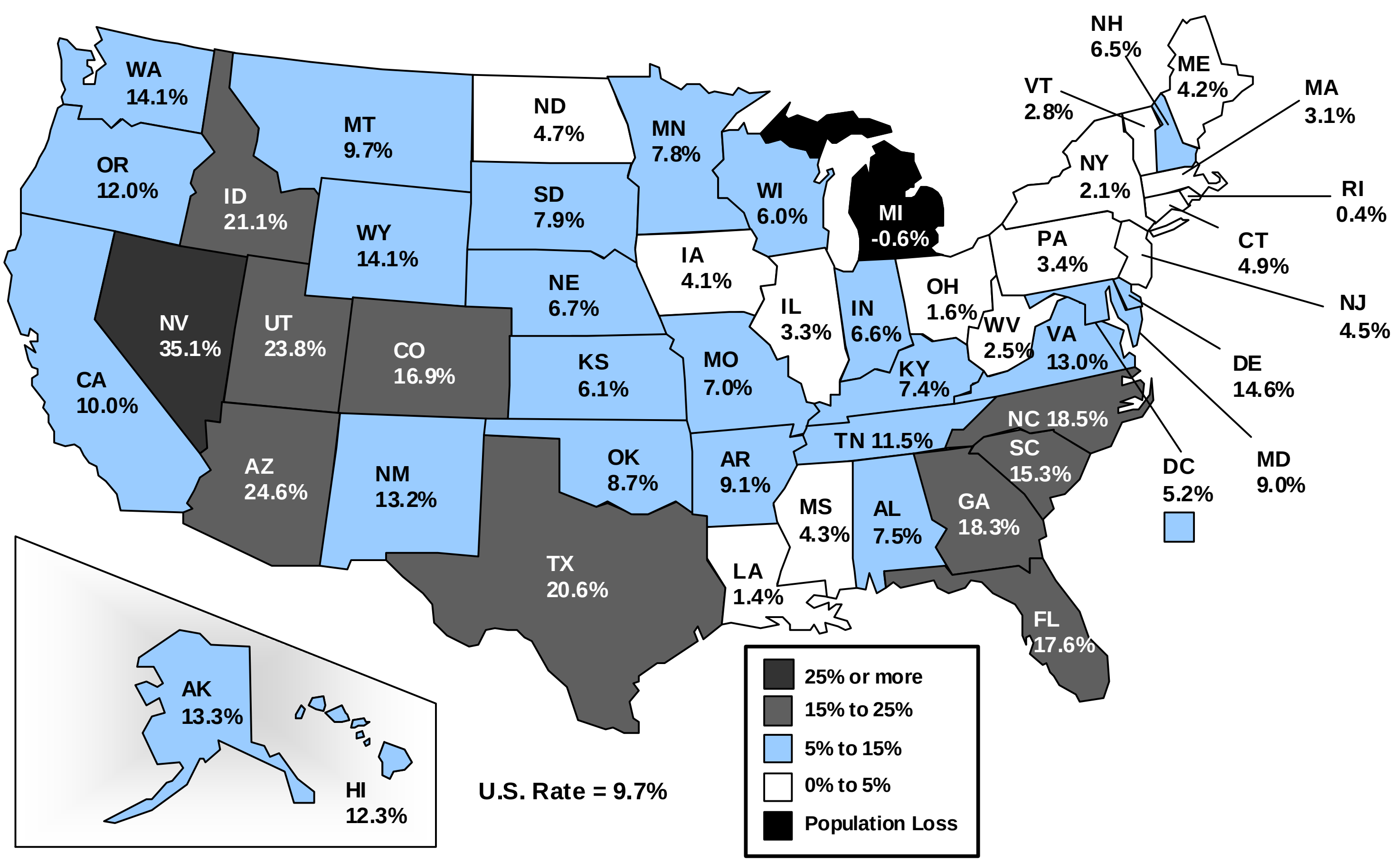
On April 1, 2010, the U.S. Census Bureau conducted the 23rd national census. The Census Bureau released national and state population totals on December 21, 2010. This is the first set of data released from the 2010 decennial census. The total 2010 population count for the United States was 308,745,538. This represents a population increase of 27,323,632 people, or 9.7% from 2000. Utah's 2010 total population count was 2,763,885. This represents a population increase of 530,716 people, or 23.8% from 2000, ranking Utah third among states in population growth. Utah grew more than twice as fast as the nation from 2000 to 2010.

The majority of states that experienced the highest growth rates from 2000 to 2010 are located in the South and West regions of the United States. The top ten states with the highest growth rates include: Nevada (35.1%), Arizona (24.6%), Utah (23.8%), Idaho (21.1%), Texas (20.6%), North Carolina (18.5%), Georgia (18.3%), Florida (17.6%), Colorado (16.9%), and South Carolina (15.3%).

These unadjusted population totals will be used to apportion seats in the U.S. House of Representatives. Based on the 2010 results, Utah has gained a fourth seat in the House of Representatives. The last time Utah gained a seat was following the 1980 Census. States that gain house seats based on Census 2010 results include: Texas (4), Florida (2), Arizona (1), Georgia (1), Nevada (1), South Carolina (1), Utah (1), and Washington (1). States that lose house seats include: New York (2), Ohio (2), Illinois (1), Iowa (1), Louisiana (1), Massachusetts (1), Michigan (1), Missouri (1), New Jersey (1), and Pennsylvania (1).

The Utah Population Estimates Committee (UPEC) produces population estimates for the state and counties each year. UPEC will produce a July 1, 2010 estimate following the release of the 2010 Census county counts and will revise the intercensal estimates to reflect the new numbers. The 2010 Census data for smaller geographical areas, as well as more detail, will be released starting in March 2011 and continuing through 2013.

Percent Change in Population for States 2000 to 2010



Source: U.S. Census Bureau

U.S. Census Bureau National and State Census Counts: 2000 and 2010

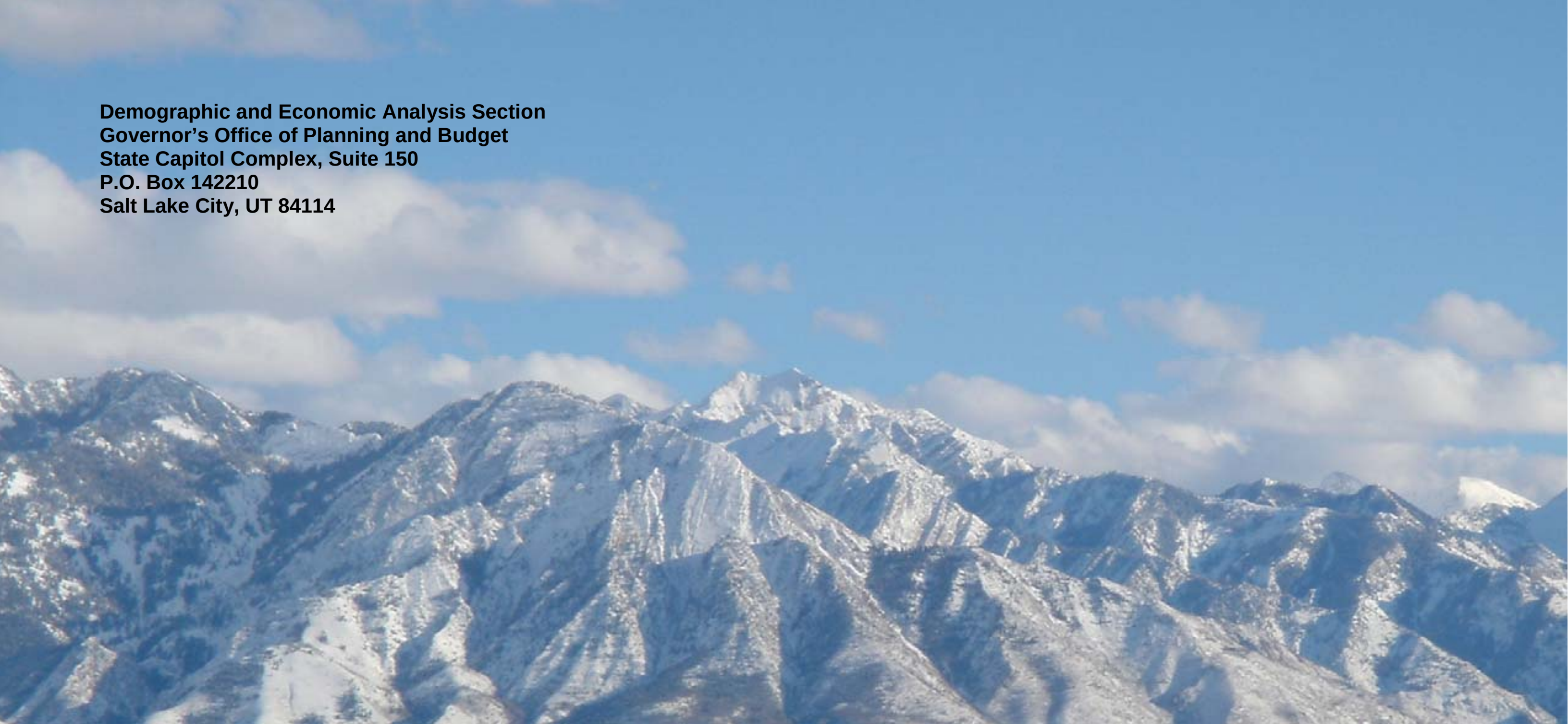
Area	April 1, 2000 Population	2000 Rank	April 1, 2010 Population	2010 Rank	2000-2010 Change	2000-2010 % Change	Rank Based on % Change
U.S.	281,421,906	na	308,745,538	na	27,323,632	9.7%	na
Region							
Northeast	53,594,378	4	55,317,240	4	1,722,862	3.2%	4
Midwest	64,392,776	2	66,927,001	3	2,534,225	3.9%	3
South	100,236,820	1	114,555,744	1	14,318,924	14.3%	1
West	63,197,932	3	71,945,553	2	8,747,621	13.8%	2
State							
Alabama	4,447,100	23	4,779,736	23	332,636	7.5%	27
Alaska	626,932	48	710,231	47	83,299	13.3%	14
Arizona	5,130,632	20	6,392,017	16	1,261,385	24.6%	2
Arkansas	2,673,400	33	2,915,918	32	242,518	9.1%	22
California	33,871,648	1	37,253,956	1	3,382,308	10.0%	20
Colorado	4,301,261	24	5,029,196	22	727,935	16.9%	9
Connecticut	3,405,565	29	3,574,097	29	168,532	4.9%	36
Delaware	783,600	45	897,934	45	114,334	14.6%	11
District of Columbia	572,059	50	601,723	50	29,664	5.2%	35
Florida	15,982,378	4	18,801,310	4	2,818,932	17.6%	8
Georgia	8,186,453	10	9,687,653	9	1,501,200	18.3%	7
Hawaii	1,211,537	42	1,360,301	40	148,764	12.3%	17
Idaho	1,293,953	39	1,567,582	39	273,629	21.1%	4
Illinios	12,419,293	5	12,830,632	5	411,339	3.3%	43
Indiana	6,080,485	14	6,483,802	15	403,317	6.6%	31
Iowa	2,926,324	30	3,046,355	30	120,031	4.1%	41
Kansas	2,688,418	32	2,853,118	33	164,700	6.1%	33
Kentucky	4,041,769	25	4,339,367	26	297,598	7.4%	28
Louisiana	4,468,976	22	4,533,372	25	64,396	1.4%	49
Maine	1,274,923	40	1,328,361	41	53,438	4.2%	40
Maryland	5,296,486	19	5,773,552	19	477,066	9.0%	23
Massachusetts	6,349,097	13	6,547,629	14	198,532	3.1%	44
Michigan	9,938,444	8	9,883,640	8	-54,804	-0.6%	51
Minnesota	4,919,479	21	5,303,925	21	384,446	7.8%	26
Mississippi	2,844,658	31	2,967,297	31	122,639	4.3%	39
Missouri	5,595,211	17	5,988,927	18	393,716	7.0%	29
Montana	902,195	44	989,415	44	87,220	9.7%	21
Nebraska	1,711,263	38	1,826,341	38	115,078	6.7%	30
Nevada	1,998,257	35	2,700,551	35	702,294	35.1%	1
New Hampshire	1,235,786	41	1,316,470	42	80,684	6.5%	32
New Jersey	8,414,350	9	8,791,894	11	377,544	4.5%	38
New Mexico	1,819,046	36	2,059,179	36	240,133	13.2%	15
New York	18,976,457	3	19,378,102	3	401,645	2.1%	47
North Carolina	8,049,313	11	9,535,483	10	1,486,170	18.5%	6
North Dakota	642,200	47	672,591	48	30,391	4.7%	37
Ohio	11,353,140	7	11,536,504	7	183,364	1.6%	48
Oklahoma	3,450,654	27	3,751,351	28	300,697	8.7%	24
Oregon	3,421,399	28	3,831,074	27	409,675	12.0%	18
Pennsylvania	12,281,054	6	12,702,379	6	421,325	3.4%	42
Rhode Island	1,048,319	43	1,052,567	43	4,248	0.4%	50
South Carolina	4,012,012	26	4,625,364	24	613,352	15.3%	10
South Dakota	754,844	46	814,180	46	59,336	7.9%	25
Tennessee	5,689,283	16	6,346,105	17	656,822	11.5%	19
Texas	20,851,820	2	25,145,561	2	4,293,741	20.6%	5
Utah	2,233,169	34	2,763,885	34	530,716	23.8%	3
Vermont	608,827	49	625,741	49	16,914	2.8%	45
Virginia	7,078,515	12	8,001,024	12	922,509	13.0%	16
Washington	5,894,121	15	6,724,540	13	830,419	14.1%	13
West Virginia	1,808,344	37	1,852,994	37	44,650	2.5%	46
Wisconsin	5,363,675	18	5,686,986	20	323,311	6.0%	34
Wyoming	493,782	51	563,626	51	69,844	14.1%	12

Source: U.S. Census Bureau

Actual and Estimated Indicators for Utah and the U.S.:

ECONOMIC INDICATORS	UNITS	2008 ACTUAL	2009 ACTUAL	2010 ESTIMATE	2011 FORECAST	PERECENT CHANGE 2009	2010	2011
PRODUCTION AND SPENDING								
U.S. Real Gross Domestic Product	Billion Chained $2005	13,228.9	12,880.6	13,246.9	13,564.0	-2.6	2.8	2.4
U.S. Real Personal Consumption	Billion Chained $2005	9,265.0	9,153.9	9,311.9	9,565.0	-1.2	1.7	2.7
U.S. Real Private Fixed Investment	Billion Chained $2005	1,997.0	1,630.6	1,688.8	1,766.1	-18.3	3.6	4.6
U.S. Real Federal Defense Spending	Billion Chained $2005	657.7	693.0	719.4	715.6	5.4	3.8	-0.5
U.S. Real Exports	Billion Chained $2005	1,647.7	1,490.7	1,663.7	1,794.7	-9.5	11.6	7.9
Utah Exports (NAICS, Census)	Million Dollars	10,306.0	10,337.1	14,062.0	15,327.5	0.3	36.0	9.0
Utah Coal Production	Million Tons	24.3	21.9	18.8	19.8	-9.7	-14.3	5.3
Utah Crude Oil Production	Million Barrels	22.0	22.9	24.2	25.2	4.1	5.5	4.1
Utah Natural Gas Production Sales	Billion Cubic Feet	402.0	405.6	386.0	380.0	0.9	-4.8	-1.6
Utah Copper Mined Production	Million Pounds	629.0	619.8	536.6	575.7	-1.5	-13.4	7.3
Utah Molybdenum Production	Million Pounds	29.6	23.1	29.8	30.7	-22.0	29.0	3.0
SALES AND CONSTRUCTION								
U.S. New Auto and Truck Sales	Millions	13.2	10.4	11.5	12.8	-21.2	10.3	11.4
U.S. Housing Starts	Millions	0.90	0.55	0.59	0.70	-38.4	6.2	19.0
U.S. Private Residential Investment	Billion Dollars	472.5	352.1	337.7	341.1	-25.5	-4.1	1.0
U.S. Nonresidential Structures	Billion Dollars	582.5	451.6	378.0	356.2	-22.5	-16.3	-5.8
U.S. Home Price Index (FHFA)	1980Q1 = 100	368.1	353.3	337.1	313.1	-4.0	-4.6	-7.1
U.S. Nontaxable & Taxable Retail Sales	Billion Dollars	4,409.4	4,131.5	4,385.3	4,613.6	-6.3	6.1	5.2
Utah New Auto and Truck Sales	Thousands	90.9	66.2	70.7	80.0	-27.1	6.8	13.2
Utah Dwelling Unit Permits	Thousands	10.6	10.5	9.3	11.0	-1.1	-11.3	18.3
Utah Residential Permit Value	Million Dollars	1,876.2	1,674.0	1,607.0	2,000.0	-10.8	-4.0	24.5
Utah Nonresidential Permit Value	Million Dollars	1,915.5	1,054.3	900.0	750.0	-45.0	-14.6	-16.7
Utah Additions, Alterations and Repairs	Million Dollars	789.0	660.1	553.0	575.0	-16.3	-16.2	4.0
Utah Home Price Index (FHFA)	1980Q1 = 100	375.0	349.1	332.7	322.8	-6.9	-4.7	-3.0
Utah Taxable Retail Sales	Million Dollars	26,489	25,600	25,404	26,365	-3.4	-0.8	3.8
DEMOGRAPHICS AND SENTIMENT								
U.S. July 1st Population	Millions	305.2	307.8	310.8	313.8	0.9	1.0	1.0
U.S. Consumer Sentiment (U of M)	Diffusion Index	63.8	66.3	71.7	75.7	3.9	8.2	5.6
Utah July 1st Population (UPEC)	Thousands	2,758	2,800	2,849	2,896	1.5	1.7	1.7
Utah Net Migration (UPEC)	Thousands	16.6	1.5	10.0	10.0			
PROFITS AND RESOURCE PRICES								
U.S. Corporate Before Tax Profits	Billion Dollars	1,333.2	1,316.7	1,825.2	1,724.2	-1.2	38.6	-5.5
U.S. Corporate Profit [above less Fed. Res.]	Billion Dollars	1,298.1	1,269.4	1,763.3	1,652.0	-2.2	38.9	-6.3
West Texas Intermediate Crude Oil	$ Per Barrel	99.8	61.8	78.9	82.8	-38.1	27.7	5.0
U.S. Coal Producer Price Index	1982 = 100	161.6	182.1	188.5	187.4	12.7	3.5	-0.6
Utah Coal Prices	$ Per Short Ton	25.7	31.5	30.0	29.0	22.6	-4.8	-3.3
Utah Oil Prices	$ Per Barrel	86.6	50.2	67.0	70.5	-42.0	33.4	5.2
Utah Natural Gas Prices	$ Per MCF	6.15	3.15	3.90	4.00	-48.8	23.8	2.6
Utah Copper Prices	$ Per Pound	3.16	2.34	3.30	3.35	-25.9	41.0	1.5
Utah Molybdenum Prices	$ Per Pound	30.0	11.5	16.0	15.0	-61.6	38.8	-6.3
INFLATION AND INTEREST RATES								
U.S. CPI Urban Consumers (BLS)	1982-84 = 100	215.2	214.5	218.0	220.9	-0.3	1.6	1.3
U.S. GDP Chained Price Index (BEA)	2005 = 100	108.6	109.6	110.7	111.9	0.9	0.9	1.1
U.S. Federal Funds Rate (FRB)	Effective Rate	1.93	0.16	0.18	0.17			
U.S. 3-Month Treasury Bills (FRB)	Discount Rate	1.40	0.15	0.14	0.29			
U.S. 10-Year Treasury Notes (FRB)	Yield (%)	3.67	3.26	3.17	2.77			
30 Year Mortgage Rate (FHLMC)	Percent	6.04	5.04	4.68	4.45			
EMPLOYMENT AND WAGES								
U.S. Establishment Employment (BLS)	Millions	136.8	130.9	130.3	131.8	-4.3	-0.5	1.2
U.S. Average Annual Pay (BLS)	Dollars	47,954	47,927	49,182	50,677	-0.1	2.6	3.0
U.S. Total Wages & Salaries (BLS)	Billion Dollars	6,559.1	6,274.1	6,406.3	6,679.7	-4.3	2.1	4.3
Utah Nonagricultural Employment (DWS)	Thousands	1,252.5	1,188.7	1,180.0	1,196.5	-5.1	-0.7	1.4
Utah Average Annual Pay (DWS)	Dollars	37,456	38,059	38,547	39,433	1.6	1.3	2.3
Utah Total Nonagriculture Wages (DWS)	Million Dollars	46,913	45,242	45,485	47,182	-3.6	0.5	3.7
INCOME AND UNEMPLOYMENT								
U.S. Personal Income (BEA)	Billion Dollars	12,391	12,175	12,551	13,021	-1.7	3.1	3.7
U.S. Unemployment Rate (BLS)	Percent	5.8	9.3	9.6	9.5			
Utah Personal Income (BEA)	Million Dollars	88,902	88,026	90,253	94,016	-1.0	2.5	4.2
Utah Unemployment Rate (DWS)	Percent	3.7	6.6	7.6	7.1			

Sources: State of Utah Revenue Assumptions Working Group, Moody's Economy.Com, and IHS Global Insight.



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Marriott Library, U of U	Dave Morrison (801-581-8394)
Merrill Library, USU	John Walters (435-797-2683)
Stewart Library, WSU	Lonna Rivera (801-626-6330)
Gerald R. Sherratt Library, SUU	Scott Lanning (435-586-7937)
Salt Lake City Library	Anne Menzies (801-322-8135)
Davis County Library System	Jerry Meyer (801-451-2322)
Voices for Utah Children	Terry Haven (801-364-1182)
Utah System of Higher Education	Joseph Curtin (801-321-7108)
Utah Community Action Partnership	Heather Tritten (801-433-3025)
Utah College of Applied Technology	Farah Thompson (801-456-7405)

Business & Industry Affiliates

Bear River AOG	Brian Carver (435-752-7242)
Five County AOG	Gary Zabriskie (435-673-3548)
Mountainland AOG	Shawn Eliot (801-229-3841)
Six County AOG	Emery Polelonema (435-893-0700)
Southeastern AOG	Debbie Hatt (435-637-5444)
Uintah Basin AOG	Lee Hill (435-722-4518)
Wasatch Front Regional Council	Scott Festin (801-363-4250)
Utah Small Business Development Center	Greg Panichello (801-957-3481)
Cache County Planning & Zoning	Josh Runhaar (435-716-7154)
Economic Development Corp. of Utah	Brigham Mellor (801-328-8824)
Moab Area Economic Development	Ken Davy (435-259-5121)
Park City Chamber & Visitors Bureau	Barbara Wainwright (435-658-9619)
Weber Economic Development Corp	Ron Kusina (801-621-8300)
Center for Public Policy & Admin	Jennifer Robinson (801-581-6781)
SLC Housing & Neighborhood Dev.	Marilynn Lewis (801-535-6409)

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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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To subscribe to this quarterly newsletter, and for assistance accessing other demographic and economic data, contact the State Data Center. This newsletter and other data are available via the Internet at DEA's web site:

www.governor.utah.gov/dea