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Research Report

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A Snapshot of 2050

An Analysis of Projected Population Change in Utah

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The mission of Utah Foundation is to promote a thriving economy, a well-prepared workforce, and a high quality of life for Utahns by performing thorough, well-supported research that helps policymakers, business and community leaders, and citizens better understand complex issues and providing practical, well-reasoned recommendations for policy change.

A Snapshot of 2050

An Analysis of Projected Population Change in Utah

Utah has been one of the fastest growing states in the nation for the past six years. Several Utah counties were among the top ten fastest growing counties in the nation between 2012 and 2013. This rapid growth is projected to continue, though the rate of this growth is up for debate. Projections range from one million to two-and-a-half million new Utahns by 2050.

Utah in the future will likely feature an older, more diverse population, as well as an increasingly urban population. Utah was the eighth most urban state in 2008, and due to the constraints of both geography and land ownership, this trend is likely to continue. Projections from the Governor's Office of Management and Budget (GOMB) show continued development in existing city centers. However, these same projections also suggest significant growth through new developments in areas of Utah, Summit, and Wasatch Counties. Market-based research outside of GOMB analysis shows that development could be significantly more rapid in Utah County depending on housing preference. Additional factors such as increases to fuel pricing, traffic congestion, or air quality will also influence where development occurs.

Utah has historically had a young population. High birth rates and a healthy population have been the leading factors in population growth since 1998. In the 1990s, population growth was influenced by net migration to a greater extent than today, mostly due to a strong economy. Hence, all projections place significant weight on predicted economic performance. Low cost-of-living and low unemployment create an incentive for in-migration.

This report will provide the background context for a series of reports in 2014 focusing on the impacts of population growth. The series will examine infrastructure and planning, water, and education.

HIGHLIGHTS

- **Utah's population has nearly tripled since 1970, and is projected to nearly double by 2050.**
- **Nine Utah counties are projected to more than double their population by 2050.**
- **Prior long-range planning efforts have helped reduce the amount of land consumed by new development by several hundred square miles.**
- **Utah's 65 and older population is projected to double by 2050, and the percentage of population 17 and younger is projected to decline.**
- **Although Utah's population will become more diverse, this diversification will be slower than the nation.**

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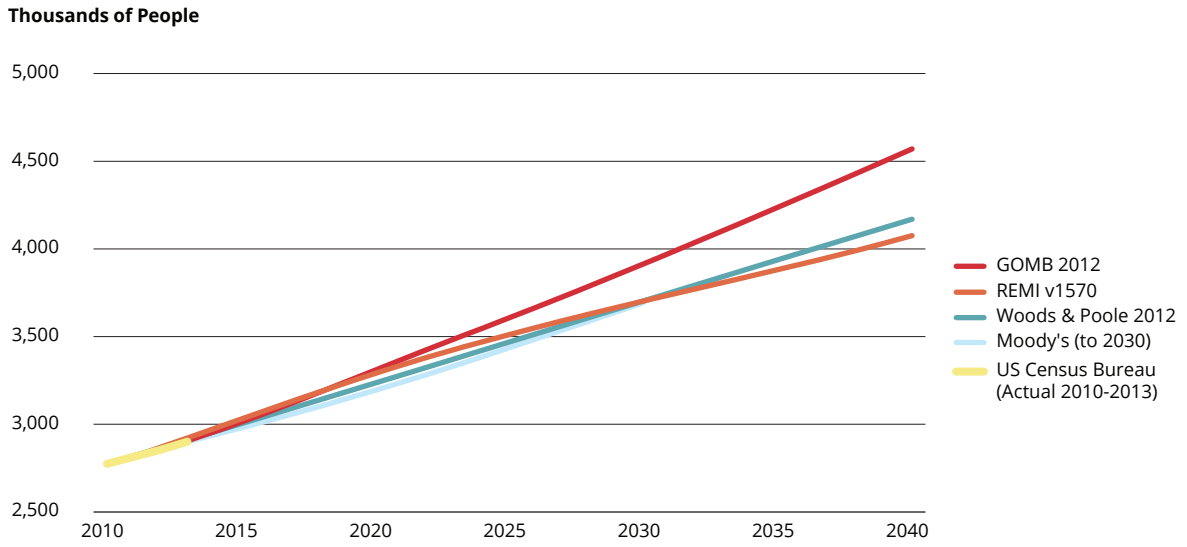
INTRODUCTION

Utah has been one of the top five fastest growing states since 2008, with a population expected to continue growing well into the future. Projections range from an addition of anywhere from one million to two-and-a-half million new residents to the state by 2050. During this time of growth, Utah has consistently earned top billing for quality of life and business development in various national analyses. Efforts in the 1990s helped to bring the concept of planning for future growth and development to the Utah population, and the "Your Utah, Your Future" initiative from Envision Utah at the request of the Governor's Office has revived the conversation. Additionally, a joint resolution passed by the Utah legislature in 2013 created a biannual planning conference for legislators to consider economic, demographic, and budget trends to plan for the future.

The prospect of future growth creates space for discussion about how Utah will handle new residents. Increasing variability of water source and supply, additional people utilizing public resources such as transportation and utilities, and additional children being added to an already stressed school system are three key reasons why planning for the future is a key step in ensuring the continued quality of life people expect in Utah.

This paper explores projected future population growth within Utah by providing some insights into who the new residents will be, where they will live, and why they will come here. Additionally, this report will introduce a series of reports that will be published throughout 2014 focusing on different impacts resulting from growth. To help inform the research process, Utah Foundation is participating in the "Your Utah, Your Future" visioning effort for 2050. The series will investigate potential impacts created by future population growth in regards to water, education, and infrastructure and development.

Figure 1: Utah Population Projection Comparison, 2010-2040



Sources: Moody's, Woods and Poole, REMI, and US Census Bureau as presented in analysis by GOMB.

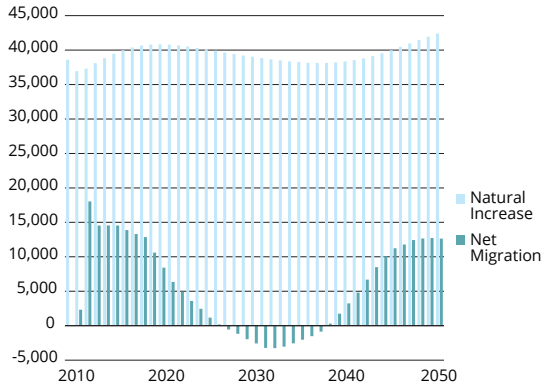
UTAH'S POPULATION GROWTH

The U.S. Census Bureau declared in 2008 that Utah was the fastest growing state in the nation.[1] In the years since, Utah has remained close to the top (resting at #5 in 2011-2012) but trended downward due in part to a decrease in net migration since 2008. Looking forward, Utah's population is projected to continue growing, although different organizations predict varying rates of growth based on employment predictions.

Population projections provide a way for policymakers and decision makers to gauge future demand on resources, economic impacts, and demographic characteristics.[2] All projections are educated guesses created by using models that factor in historic and anticipated trends in economics and demographics. Although population projections are a useful tool for planning, no projection can be assumed to be a prediction of the future. Long-term projections need to be utilized thoughtfully in any planning process.

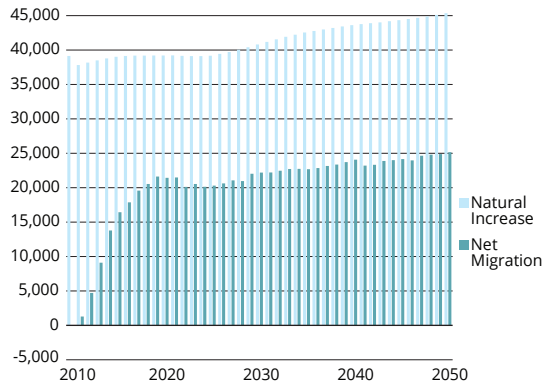
There are various entities that produce population projections – universities, private firms, metropolitan planning organizations, and governments to name a few. The Utah Governor's Office of Management and Budget (GOMB) projects that by 2050, Utah will have an additional 2.5 million residents.[3] Figure 1 shows the variation between several leading firms' projections for the state compared to GOMB projections. The process each firm uses to create projections is unique to the firm. However, the economic climate is a major variable in all of the analyses. Job growth is a leading cause of in-migration and to retain population in Utah and will in turn have an impact on overall population growth.

Figure 2: REMI Projections for Natural Increase and Net Migration, 2010-2050



Source: REMI presented in GOMB analysis.

Figure 3: GOMB Projections for Natural Increase and Net Migration, 2010-2050



Source: GOMB.

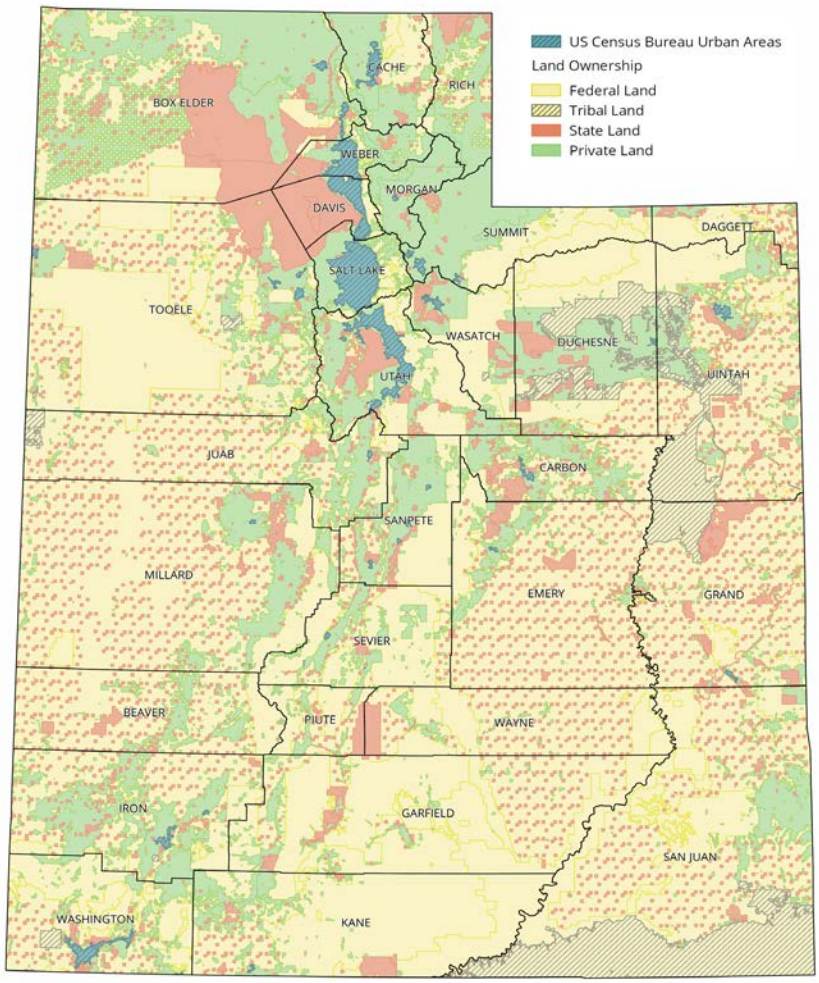
The differences between projections are primarily due to variations in anticipated job growth within the state.[4] Figures 2 and 3 highlight the differences in two of the projections in a more detailed way by separating natural increase (births minus deaths) and net migration (in migrants minus out migrants). GOMB analysis shows a significant difference between GOMB and REMI projections between about 2025 and 2050. REMI predicts negative net migration – more people will be leaving than moving in – while GOMB maintains a level similar to 2020 projections into the future. Figure 1 also highlights a split in 2025 of GOMB projections from the others, with GOMB having a steeper level of increase out to 2020. GOMB projections are a key component for determining water, transportation, and air quality planning within Utah. Since GOMB is the state resource for this topic, analysis in this report will use GOMB projections.

Although the potential addition of 2.5 million residents is significant, a measure of perspective is helpful. The state population has nearly tripled since 1970 (1.1 million to an estimated 2.9 million in 2013).[5] This growth has resulted in a more urban Utah, a more diverse population, and a diversified economy. In looking at our future growth, this report will examine where the population is projected to be, who the new growth will be composed of, and why people might want to come to Utah.

WHERE PEOPLE WILL LIVE

In 2010, 90.6% of Utahns lived in "urban" areas – designated by the Census Bureau as densely developed areas of at least 2,500 people. This percentage gave Utah the distinction of being the eighth most urban state in the nation.[6] Of the "urban" population, only about 15% live outside the Wasatch Front area (Salt Lake, Davis, Utah, and Weber counties).[7] In 1970, the percentage of people living in urban areas was only 80%. This trend of increasingly "urban" development is going to continue, and the majority of population growth is projected by GOMB to be in these urban areas. This dense development is in part a result of the small percentage of the state that is held under private ownership, as seen in Figure 4. Almost 80 percent of the land in the state is Federal, State, or Tribal land, which creates an additional limitation to where residential and commercial development can occur.[8]

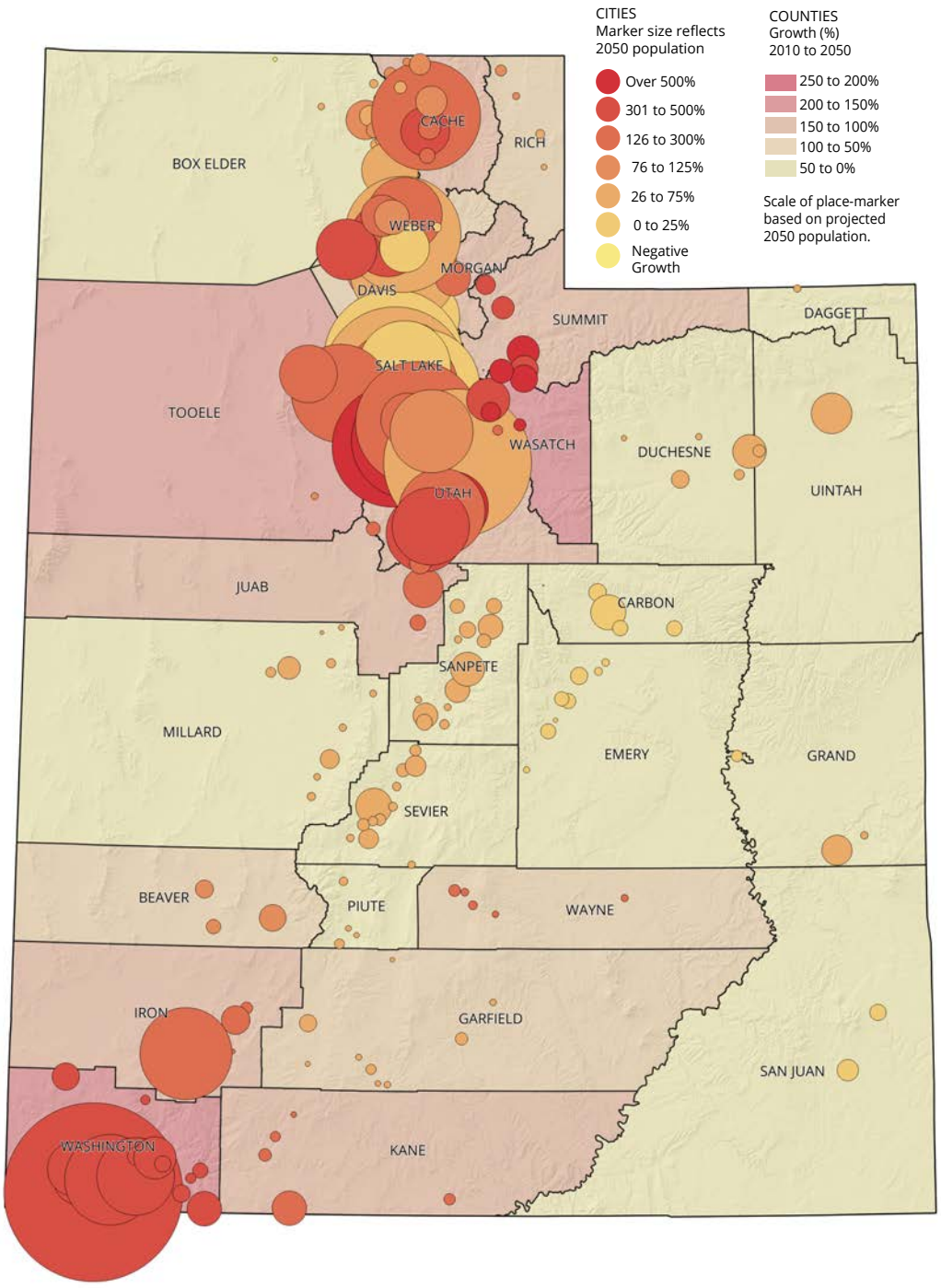
Figure 4: Utah's Urban Areas and Land Ownership



Source: Utah AGRC, US Census Bureau.

Existing large population centers are expected to expand, although at varying rates. While the coming population changes are projected to be gradual overall, changes in some areas will be dramatic. Figure 5 places the percent change in GOMB projections from 2010 to 2050 for cities and counties on the map. The map highlights continued population concentration in cities along the Wasatch Front, though Salt Lake and Davis counties will see slower rates of growth than Utah and

Figure 5: Heat Map of Population Growth Through 2050



Source: Utah AGRC, GOMB, Utah Foundation analysis.

Washington counties, in part due to less remaining undeveloped land. Smaller cities outside of these areas, located primarily along interstate highway corridors, are also projected to see lower rates of growth. Nine of the twenty-nine counties are projected to more than double their population by 2050, whereas Salt Lake County is only projected to increase its population by 61% in the same time. Figure 6 provides details on all counties.

Figure 6: Projected Population Change, Counties

	2010	2050, Projected	Projected Percent Change 2010-2050
Larger than 100,000 in 2010			
Washington County	138,115	472,567	242%
Utah County	516,564	1,216,695	136%
Cache County	112,656	232,468	106%
Weber County	231,236	398,699	72%
Salt Lake County	1,029,655	1,659,566	61%
Davis County	306,479	465,664	52%
Between 20,000 and 100,000 in 2010			
Wasatch County	23,530	76,389	225%
Tooele County	58,218	157,821	171%
Summit County	36,324	88,334	143%
Iron County	46,163	105,797	129%
Sanpete County	27,822	40,689	46%
Uintah County	32,588	46,291	42%
Box Elder County	49,975	70,501	41%
Sevier County	20,802	28,241	36%
Carbon County	21,403	23,582	10%
20,000 or less in 2010			
Juab County	10,246	23,382	128%
Morgan County	9,469	20,654	118%
Kane County	7,125	15,314	115%
Wayne County	2,778	5,326	92%
Beaver County	6,629	11,837	79%
Rich County	2,264	3,495	54%
Garfield County	5,172	7,902	53%
Duchesne County	18,607	27,123	46%
Daggett County	1,059	1,519	43%
Grand County	9,225	13,098	42%
Piute County	1,556	2,207	42%
Millard County	12,503	14,422	15%
Emery County	10,976	12,016	9%
San Juan County	14,746	15,640	6%

Source: GOMB Population Projections.

Washington County is projected to have the largest percentage change between 2010 and 2050, with the city of St. George projected to add over 175,000 people. Utah County and those counties neighboring the Wasatch Front (Wasatch, Tooele, and Summit) round out the top five counties with the largest percentage change. This growth of neighboring counties is likely due to the fact that Salt Lake and Davis counties are nearly built out,

and thus most new development will likely be farther from existing city centers. Despite smaller percentage increases than Washington, Utah, and Cache counties, Salt Lake County is projected to add around 630,000 new residents. This growth is the second largest amount for any county in the state, and would need to be accommodated in a variety of ways including infill, redevelopment, and reuse of underutilized commercial and industrial land. Out of cities with over 50,000 residents, South Jordan, located in Salt Lake County, was the second fastest growing city in the nation between 2011 and 2012.[9] Figures 7 and 8 show projections for the ten cities with the largest percent change, and cities over 20,000 with the largest percent change.

Figure 7: Largest Projected Percent Change, All Cities

City (County)	2010	2050, Projected	Projected Percent Change 2010-2050
Vineyard (Utah)	139	20,000	14288%
Fairfield (Utah)	119	3,900	3177%
Cedar Fort (Utah)	368	6,900	1775%
Independence (Wasatch)	164	1,168	612%
Charleston (Wasatch)	415	2,953	612%
Hideout (Wasatch)	656	4,474	582%
Genola (Utah)	1,370	8,600	528%
Salem (Utah)	6,423	40,100	524%
Saratoga Springs (Utah)	17,781	107,900	507%
Unincorporated Utah County	10,009	60,195	501%

Source: GOMB Population Projections.

Projections show Utah County with the highest increase of individual residents - 700,000 additional people anticipated by 2050. This significant growth in Utah County is reflected in projections for both small and larger cities. Through analysis of GOMB projections, of the 26 listed cities in Utah County, 11 have a projected percent change of over 200%. Smaller towns in Utah County will still see significant changes – Vineyard is projected to see its population multiply to over ten times what it was in 2010 by 2020; Fairfield, Genola, and Cedar Fort are all projected to more than double their populations in the same timeframe. Eagle Mountain and Saratoga Springs are projected to add over 90,000 people by 2050.

Figure 8: Largest Projected Percent Change, Cities with over 20,000 residents in 2010

City (County)	2010	2050, Projected	Projected Percent Change 2010-2050
Eagle Mountain (Utah)	21,415	114,400	434%
St George (Washington)	72,897	249,421	242%
Herriman (Salt Lake County)	21,785	64,896	198%
Lehi (Utah)	47,407	120,000	153%
Tooele (Tooele)	31,605	75,545	139%
Cedar City (Iron)	28,857	66,135	129%
South Jordan (Salt Lake)	50,418	110,083	118%
Midvale (Salt Lake)	27,964	60,206	115%
Spanish Fork (Utah)	34,691	72,300	108%
American Fork (Utah)	26,263	54,000	106%

Source: GOMB Population Projections

Since much of the Wasatch Front is geographically restricted by mountains to the east, the Great Salt Lake, and the Oquirrh Mountains to the west, the amount of available private land is quickly being consumed through new development. Accordingly, the further expansion of urban areas will require thoughtful planning and consideration. In 1997, Envision Utah held a series of statewide, scenario-planning workshops across the 10-county Greater Wasatch Area to determine how to best accommodate the population changes of the next 20 years. Through that process and subsequent voluntary buy-in from municipalities and counties, the development patterns of the early 2000s ended up consuming several hundred square miles less than models had projected.[10] Although single-family housing during the period was popular, research shows the average lot size on the Wasatch Front decreased by about 0.10 acres between 1990 and 2010.[11] These efforts to look into the future are currently being revisited by Envision Utah at the request of the Governor's Office through an initiative called "Your Utah, Your Future." The new program will provide Utahns an opportunity to visualize different ways for the state to develop in the future.

Planning in the 1990s helped reduce land consumption by hundreds of square miles.

GOMB county projections are used by the five metropolitan planning organizations (MPO) in the state to help determine future land use and transportation; however, other non-government entities are looking at potential alternatives in future development. In 2013, a number of entities including Envision Utah, the Wasatch Front Regional Council, Mountainland Association of Governments, Utah Transit Authority, and Central Utah Water Conservancy District commissioned an analysis of remaining developable land, as well as market patterns into the future within Weber, Davis, Salt Lake and Utah counties. Their analysis shows that despite GOMB projections showing significant growth within Salt Lake County, unless market preferences shift away from single-family homes, it is unlikely Salt Lake County will be able to accommodate the projected increase in residents. The result of this mismatch is more rapid growth than is currently projected in Utah County. [12] This analysis provides one market-based alternative to current projected population areas, but there are many factors that could change where residential development occurs and what types of housing are in demand.

Nationally, the demands on the housing market will change with shifting demographics. A 2014 study on generational trends of homebuyers nationally showed that buyers over the age of 57 are increasingly buying units in townhouse, condo, and senior developments versus younger buyers who overwhelmingly (82%) purchase detached, single-family houses.[13] While single-family homes may still be the predominant choice of homebuyers, homeownership rates have declined nationally across all age groups since 2004.[14] Due in part to student debt, the current pool of first-time homebuyers is smaller than in previous decades.[15] If this trend continues, demands for housing types may shift and also change where populations grow. Additionally, factors such as increases in traffic congestion modeled by regional metropolitan planning organizations and potential increases to transportation expenses in the future could influence the amount of growth that could occur in existing developed areas. The potential cost impacts created by these two factors on commuters from new developments could potentially impact the market desirability of additional housing development in pre-existing developed areas.

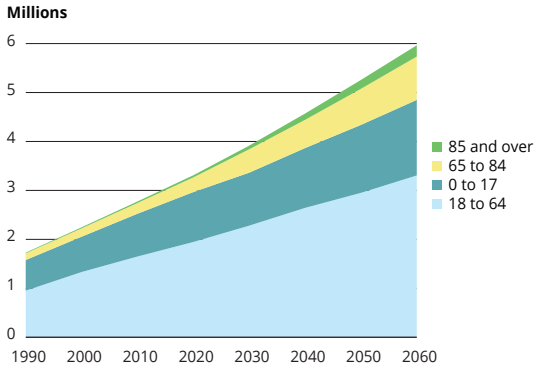
WHO WILL LIVE HERE

Over the past ten years an increasing proportion of population growth in the state has been due to "natural increase," which is births minus deaths.[16] This is due in part to the effect of the Great Recession on international and inter-state migration. In the 1990s, natural increase and migration were within 5-15% of each other. This trend has changed since the late 1990s, with natural increase making up over 75% of population growth on average between 1998 and 2012 (more than 90% annually since 2009).

In 2012 just over 50% of the population was under 30, placing Utah as the youngest state in the nation.[17] In addition to being the youngest state, Utah also has the highest fertility rate nationwide. Utah's fertility rate of nearly 84 births per 1000 women is over 10 points higher than the second highest state, Idaho, at just over 72 per 1000 women.[18] Utah is 20 points higher than the national fertility rate.[19] The overarching trends of a young population and lots of children are likely to continue due to the predominant culture in the state focusing on large families; however, GOMB projections suggest that in about 25 years the age structure will flip and those 60 years and older will become the fastest growing segment of the population.[20] Figure 9 shows the projected age composition of the state to 2050.

With increases to both the youth and the 60+ populations, the slower growth to the working age population will result in it comprising a smaller segment of the total. One way to analyze this is with the dependency ratio, which compares working age adults to non-working age individuals (children and 65+). Nationally, Utah's dependency ratio has been one of the top in the U.S., due to our large youth population.[21] In 2012 the dependency ratio for Utah was 68.3, meaning there were 68.3 non-working age people for every 100 working age individuals. 2000 and 2010 were low years in regards to dependency ratio. 1990 had a high dependency ratio due to a large number of children. However, the make-up of the overall dependency ratio is projected to change significantly as seen in Figure 10. Although the dependency ratio in 1990 is similar to the projected dependency ratio for 2050, 81.6 and 80.4 respectively, the impacts created will be different due to the populations within it.

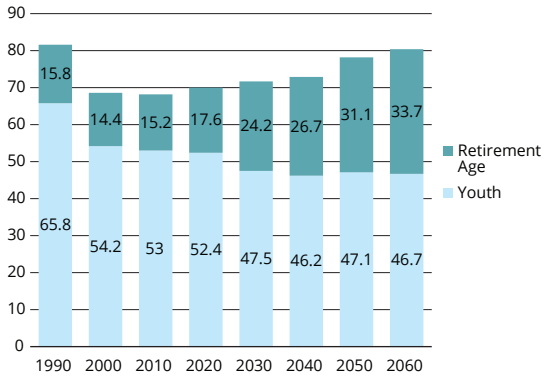
Figure 9: Youth, Working Age and 65+ Population Projections



Source: GOMB.

The projected growth of the dependency ratio is primarily due to an increase of the 65 years and older population, which is projected to double by 2050.[22] Comparing Utah projections to national projections, the 65+ years dependency ratio is projected to be lower in Utah (33.7) than in the U.S. (37). However, the difference between the projected 2030 and 2050 65+ dependency ratio is more significant in Utah (24.2 to 33.7) than in the nation (35 to 37).[23] A 2013 report by the AARP shows that in Utah the support ratio – the number of potential caregivers, aged 45-64 for each person 80 and older – will change from 8.3 in 2010 to 3.4 in 2050. This is better than the projected national support ratio change from 7.2 to 2.9 in the same period. This shift in age structure could create significant impacts in education, health and community services, and the economy.

Figure 10: Utah Actual and Projected Dependency Ratios, 1990-2060



Source: Bureau of Economic and Business Research.

The growth in the aging population of the state is due to one of the largest generational cohorts in America – the Baby Boomers. Born between 1946 and 1965, Baby Boomers were the largest cohort until

Figure 11: Generational Cohorts in U.S. and Utah

	Utah		U.S.	
	Count	Percent	Count	Percent
Total Population	2,763,885	100%	308,745,858	100%
Boomers (1946-1964)	517,164	18.7%	76,980,577	24.9%
Gen X (1965-1980)	578,649	20.9%	65,541,573	21.2%
Millennials (1981 - 1995)	720,385	26.0%	85,405,385	27.7%

Source: US Census Bureau.

the Millennials (1981-1995).[24] Both Baby Boomers and Millennials, due to their size, will continue to create large impacts on society. Generationally, Utah reflects the national trend of Millennials outnumbering Baby Boomers; however, the national trend of Generation X being a much smaller cohort than the other two is not reflected in Utah. Figure 11 compares the sizes of these cohorts in Utah and the U.S.

Nationally, there is ample coverage on the new, divergent ways Millennials are coming of age. Their different approaches to work, social issues, political process, living patterns, and technology will all potentially affect the issues this paper addresses. Some of the trends found through national and international research of Millennials include: a commitment to creating social impact, lower religious participation and affiliation, more liberal political leaning and independence from political parties, ease and use of current technology, ethnic and racial diversity, and optimism for their future.[25] The Millennial generation are beginning to enter into middle-age and leadership positions, and this will frame the discourse in the decades to come, similar to the impact created by Baby Boomers throughout the 80's and 90's. Although research regarding Millennials specific to Utah has not been done, one trend that is currently visible is the increase of racial and ethnic diversity.

Utah's current racial demographics are similar to the nation as a whole in the 1950s – four-fifths of the population is white with a much smaller proportion of other races.[26] Although racial diversity is shifting slowly toward the national average, Utah's ethnic diversity is changing more rapidly. Since the 1980 Census, the proportion of white, non-Hispanic members of the Utah population has decreased as seen in Figure 12.[27] On a national level, the U.S. Census Bureau projects that by 2043 half of the country will be racial and ethnic minorities.[28] This trend will likely not be reflected statewide within the same timeframe, though some project that Salt Lake County will be comprised of over 40% racial and ethnic minorities by 2050.[29] However, younger Utahns are already part of a more diverse Utah and will continue to have more diverse experiences in the future – especially at school.

The increase in non-white or ethnic minority population has changed the demographics of Utah's schools in addition to the state population as a whole. Between 2000 and 2007, 33% of Utah's population growth was due to non-white residents, while 65% of school enrollment growth was due to non-white student population change.[30] In 2013, ethnic minority students comprised 23.5% of students in Utah schools, up from 17.4% in 2004.[31] The next generation of Utahns is already growing up in a state different from what previous generations knew.

WHY PEOPLE WILL LIVE HERE

Growth and changes in demographics are impacted by quality of life and the economy.[32] Utah has been at the top of many lists touting business development, recreation, and technological advances. Provo-Orem, Salt Lake City, and Ogden-Clearfield all maintained spots on the Milken Institute Best Performing cities list in 2013, although their rankings have dropped since 2008.

Additionally, the Equality of Opportunity Project ranked Salt Lake City the most likely city in which individuals can achieve the American Dream through intergenerational economic mobility based upon

Figure 12: Race and Ethnicity over Time, Utah

	1980 Census		1990 Census		2000 Census		2010 Census		2012 ACS*	
	Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent
Total	1,461,037	100%	1,722,850	100%	2,233,169	100%	2,763,885	100%	2,855,287	100%
Ethnicity										
Hispanic or Latino	60,302	4.1%	84,597	4.9%	201,559	9.0%	358,340	13.0%	379,433	13.3%
Not Hispanic or Latino	1,400,735	95.9%	1,638,253	95.1%	2,031,610	91.0%	2,405,545	87.0%	2,475,854	86.7%
White Alone, Not Hispanic	1,350,462	92.4%	1,571,254	91.2%	1,904,265	85.3%	2,221,719	80.4%	2,278,904	79.8%
Race										
White	1,382,550	94.6%	1,615,845	93.8%	1,992,975	89.2%	2,379,560	86.1%	2,514,908	88.1%
Black or Afr. Amer.	9,225	0.6%	11,576	0.7%	17,657	0.8%	29,287	1.1%	31,797	1.1%
Amer. Ind. & Alaska Native	19,256	1.3%	24,283	1.4%	29,684	1.3%	32,927	1.2%	31,448	1.1%
Asian	13,389	0.9%	25,696	1.5%	37,108	1.7%	55,285	2.0%	62,575	2.2%
Nat. Hawaiian and Pac. Isl.	1,687	0.1%	7,675	0.4%	15,145	0.7%	24,554	0.9%	25,765	0.9%
Some Other Race	34,930	2.4%	37,775	2.2%	93,405	4.2%	166,754	6.0%	119,195	4.2%
Two or More Races	n/a	n/a	n/a	n/a	47,195	2.1%	75,518	2.7%	69,599	2.4%

Source: US Census Bureau.

factors such as job opportunities, social capital, and connections to alternative transportation.[33] The opportunity for intergenerational mobility provides families with a place where future generations have the ability to do better economically than those preceding them, and could be an unrecognized reason that people are drawn to Utah.

Planning efforts from the Governor's Office of Economic Development are meant to build on existing successes and continue fostering an environment that supports these accolades. The Utah Economic Development Plan (2010) highlights a strategy the state has set for moving forward with a key element being continued diversification of the economy. Closures of several large industries in the 1980s helped initiate this process, and the formal introduction of "economic clusters" in the 2000s created a framework that has brought new national and international businesses to the state.[34] The ideology to turn Utah into a "hypercompetitive region in focused industries" has continued to present day, and has helped to create a vibrant and sustainable economy – removing the potential for significant decline created by having a single economic focus similar to the Rust Belt of the U.S.[35] The 2012 Hachman Index listed Utah as having the 4th most diverse economy in the U.S., though 39 of the 53 U.S. states and territories

Salt Lake City was ranked as the #1 city to achieve the American Dream.

analyzed had an index of 0.90 or higher. Utah's index of 0.97 illustrates that the state has an "industry structure that mirrors 97 percent that of the United States."[36]

The Department of Workforce Services projections of highest annual projected job growth show a mix of markets and differences within regions from 2010-2020. Figure 13 shows the top two occupation sectors by projected annual growth for each region, with healthcare support occupations and construction and extraction occupations as the two leaders statewide.[37] In examining these occupation groups by specific jobs by region, there is a trend in urban areas for jobs requiring more training – whether post-secondary degrees or certificates. Jobs with the most annual openings statewide are typically hourly-wage, low-skill jobs such as retail sales, cashiers, and customer service representatives.[38]

Figure 13: Top Two Occupational Groups by Projected Annual Growth, 2010-2020 by Area

Area	Occupation Group	Annual Percent Growth
Bear River	Construction and Extraction	3.4
	Personal Care and Service	3.3
Central	Personal Care and Service	4
	Transportation and Material Moving	3.2
Eastern	Construction and Extraction	3.9
	Business and Financial Operations	3.2
Ogden/Clearfield MSA	Healthcare Support	4
	Healthcare Practitioners and Technical	3.5
Provo/Orem	Construction and Extraction	5
	Healthcare Support	4.4
Salt Lake City	Personal Care and Service	3.3
	Computer and Mathematical	3.3
Southwest	Healthcare Support	3.6
	Healthcare Practitioners and Technical	3.4
Washington County	Construction and Extraction	7.8
	Healthcare Practitioners and Technical	4.3

Source: Utah Department of Workforce Services.

Figure 14: Top Ten Occupational Groups by Projected Annual Growth, 2010-2020 Statewide

Occupation Group	Growth
Healthcare Support	3.5
Construction and Extraction	3.4
Community and Social Service	3.3
Personal Care and Service	3.2
Healthcare Practitioners and Technical	3.2
Business and Financial	3.1
Computer and Mathematical	3.1
Education, Training, and Library	2.7

Source: Utah Department of Workforce Services.

Outside of the Wasatch Front, fields such as energy development are playing a large role in economic opportunity. In Uintah County, non-farm employment is primarily dependent on oil and gas development. Although job growth has steadied in Uintah County, from 2001 to 2008, non-farm employment grew by almost 70%.[39] Duchesne County has also been impacted by the boom of oil and gas development, being the second fastest growing county in the nation from 2012 to 2013.[40]

As mentioned above, net migration as a contributor to population growth fluctuates with the economic state of Utah. Positive economic climates help to both retain existing population and increase in-migration. The unemployment rate for Utah in 2013 and 2014 was among the lowest in the nation, and Utah is continually ranked one of the top states for business and careers. Although growth will continue into the future due to natural increase, the biggest variation will result from net migration. As seen with the variability of projections in Figure 1, the rates of growth will be highly dependent on the state's economic performance.

POPULATION GROWTH SERIES TOPICS

The where, who, and why of population growth in Utah will affect the quality of life for future Utahns in many ways. The "where" will help provide insight into areas of future new development, redevelopment, and where public resources such as water, transportation, energy, and schools will be needed. The "who" will give ideas as to what kinds of people will be decision makers, what type of people might be coming to the state, and what type of services might need to be created, changed, or kept the same. As illustrated with Figures 1, 2, and 3 above, the "why" is a key barometer for population projections. If the economy grows differently than projected, we will likely see changes to migration. If quality of life changes, we could see changes to natural increase or migration. The potential impacts of these factors will help guide the series of reports Utah Foundation plans to publish this year. The following is a brief overview of each of the topics that will be covered in the three reports that are planned. Several questions and assumptions overarch all the reports, including the following:

- What do Utahns want the state to look like?
- What role will potentially-constrained resources play?
- Technologies will change, perhaps expanding the state's capacity to deal with future growth; though such advancements are speculative, to what degree should these considerations enter the discussion?

Infrastructure and Planning Report

This report will examine potential impacts to the built environment. Specifically, how the addition of 2.5 million people can be accommodated in areas that are geographically and otherwise constrained; the impact to transportation options; the infrastructure needed for the 2.5 million new Utahns to live and thrive; and how all of this could be achieved in a way to help maintain the quality of life Utahns have come to love and expect.

Education Report

With the addition of new children being a constant in Utah's future population growth, impacts to education will need serious consideration. In 2013, Utah Foundation produced a report on how peer states are handling K-12 education and achieving great results. Using the groundwork laid in this report, the education report will delve into long-term funding resources and options for schools.

Water Report

As seen in areas of Nevada, rapid building without sustainable water sources can create huge burdens down the road. Las Vegas has acknowledged these challenges by instituting mandatory conservation measures, which have helped reduce per-person gallons per day by about 100 gallons.[41] The GOMB projections show a significant increase in urban areas, which means that new water use will be primarily municipal and industrial. In order to mitigate and avoid the same problems Nevada now struggles with, best management and planning practices need exploration.

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