

Salt Lake City School District

Demographic and Enrollment Analysis

Governing Board Presentation

January 19, 2022



APPLIED ECONOMICS

Study Scope

Enrollment Trends

- Total and grade level distribution
- Geographic distribution
- Alternative providers

Demographic Characteristics

- Population characteristics
- Household type and age structure
- Housing supply and occupancy rates

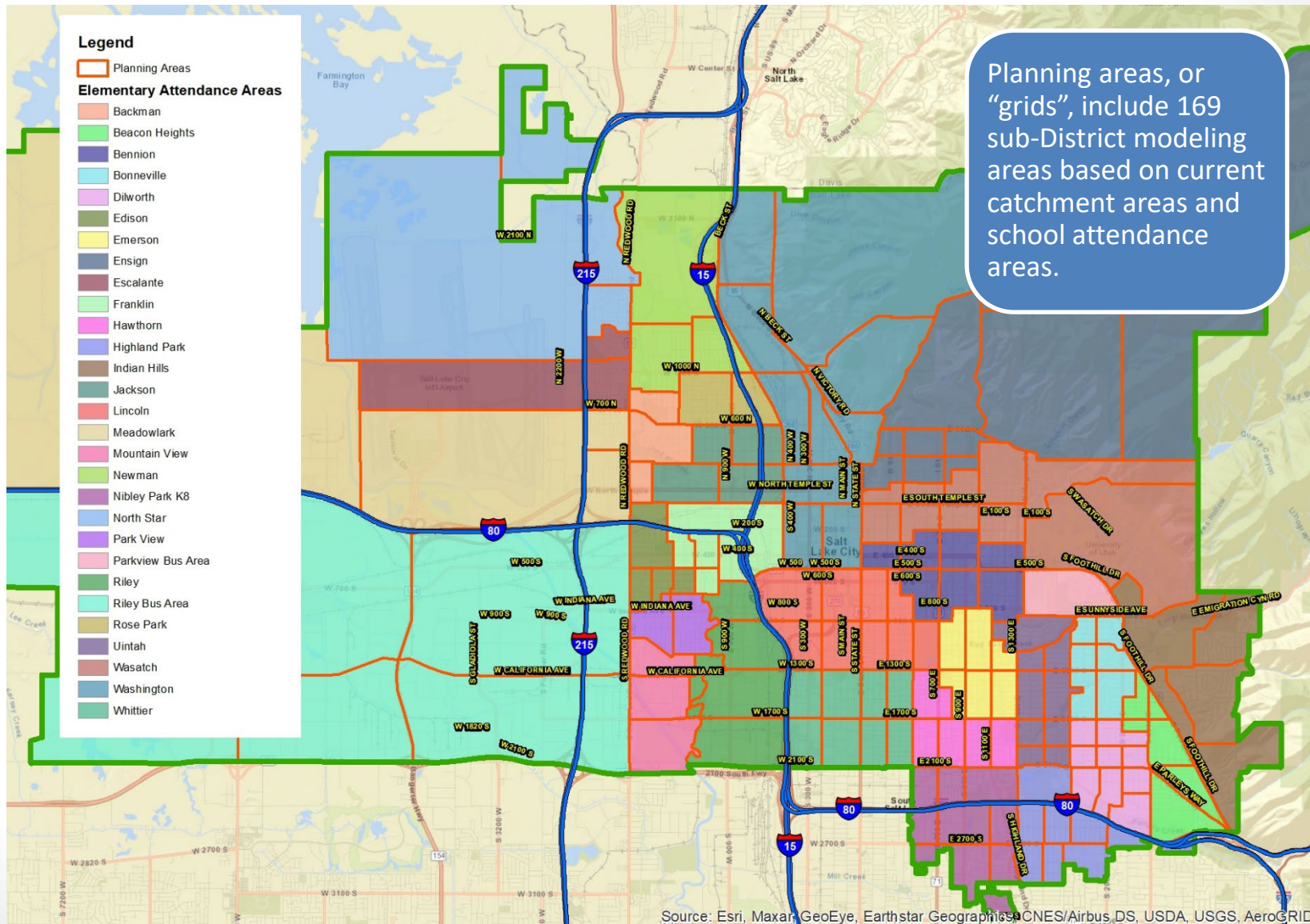
Residential Development Impacts

- Current development activity
- Housing market conditions
- Development potential

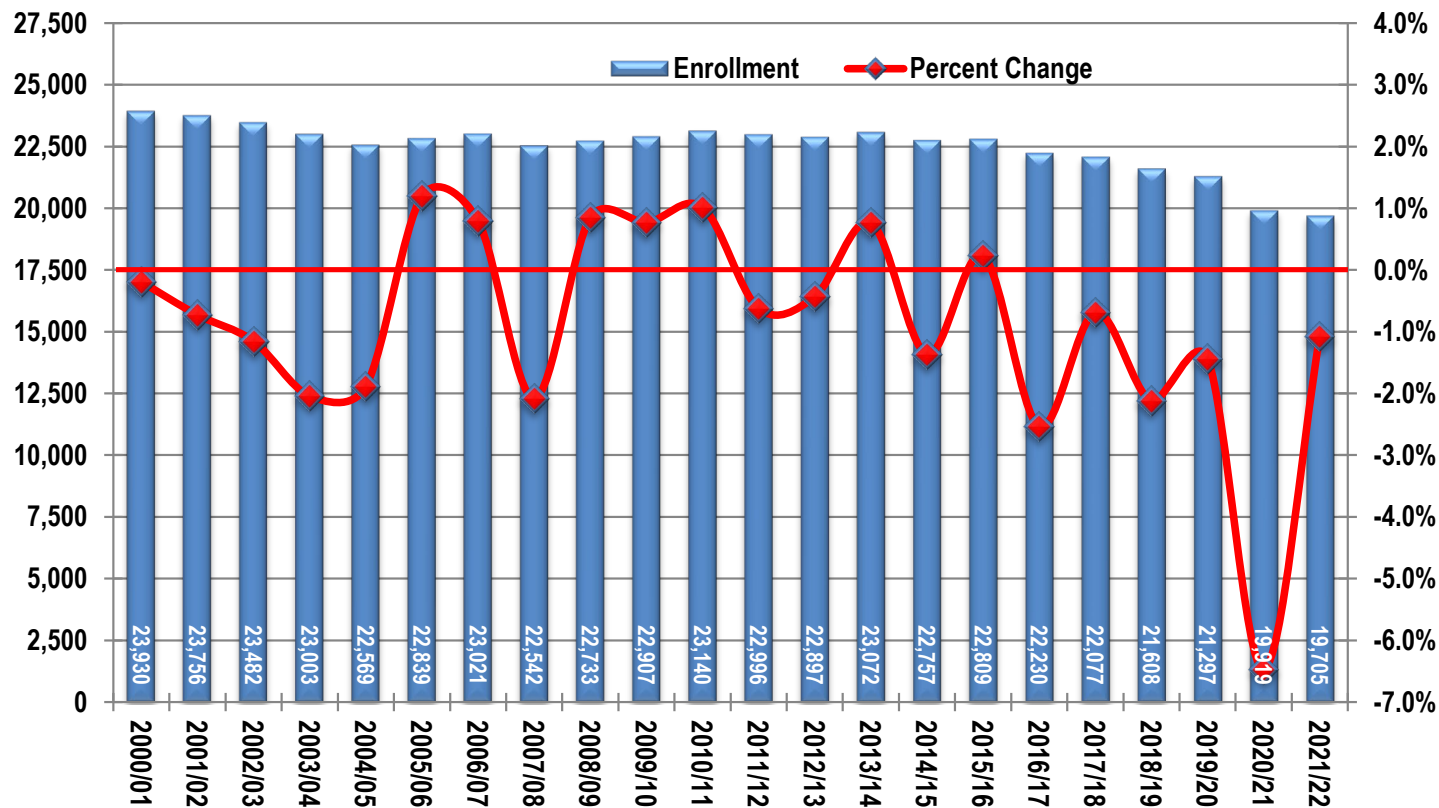
Enrollment Projections

- District
- Sub-District

Planning Geography



Fall K-12 Enrollment *



Source: Salt Lake City School District.

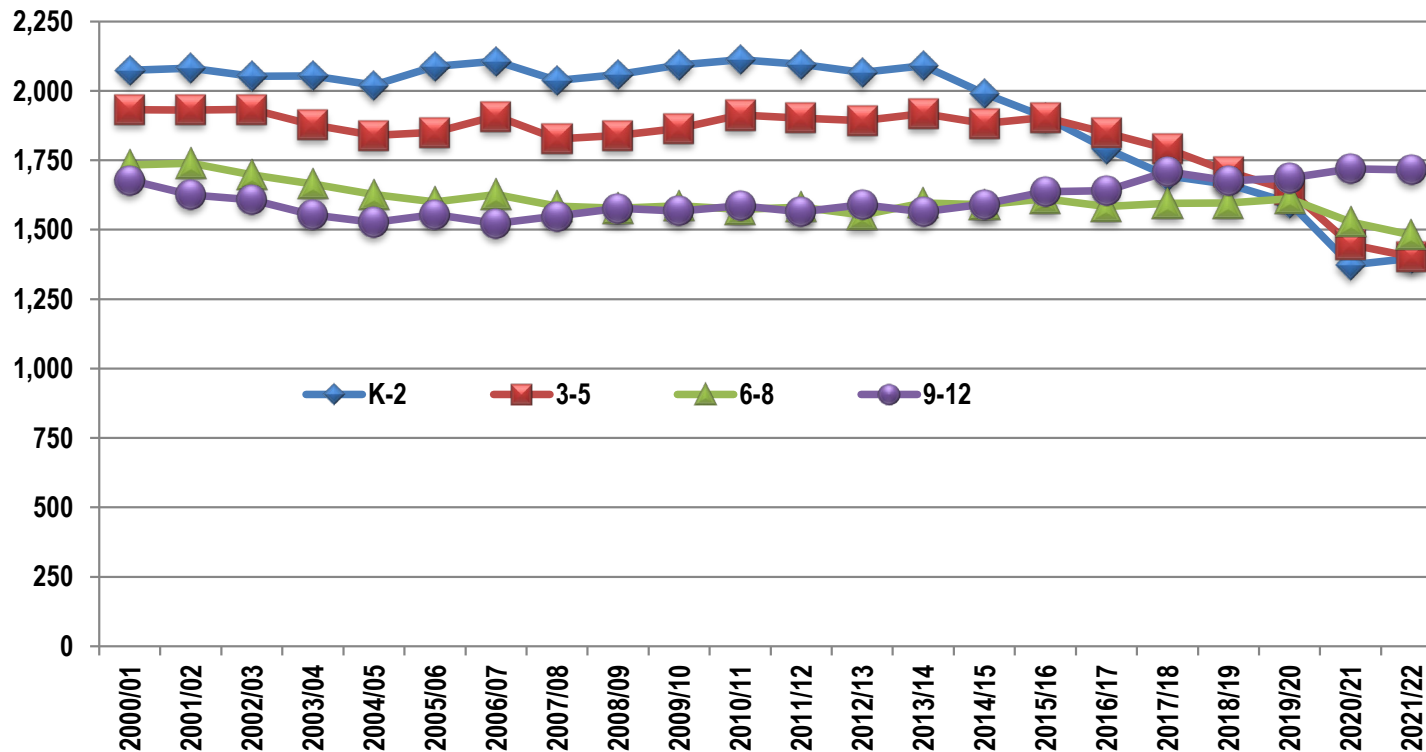
District enrollment was very stable through 2015/16, but it has declined by roughly 3,200 students since then; losses last year were exacerbated by COVID-19 impacts.

Like many districts, Salt Lake City did not see a boost in enrollment this year, following the 2020/21 COVID-related drop, as many parents found education alternatives.

* Non-charter schools only.

Fall Enrollment Cohorts *

Average Enrollment per Grade



Source: Salt Lake City School District; Applied Economics.

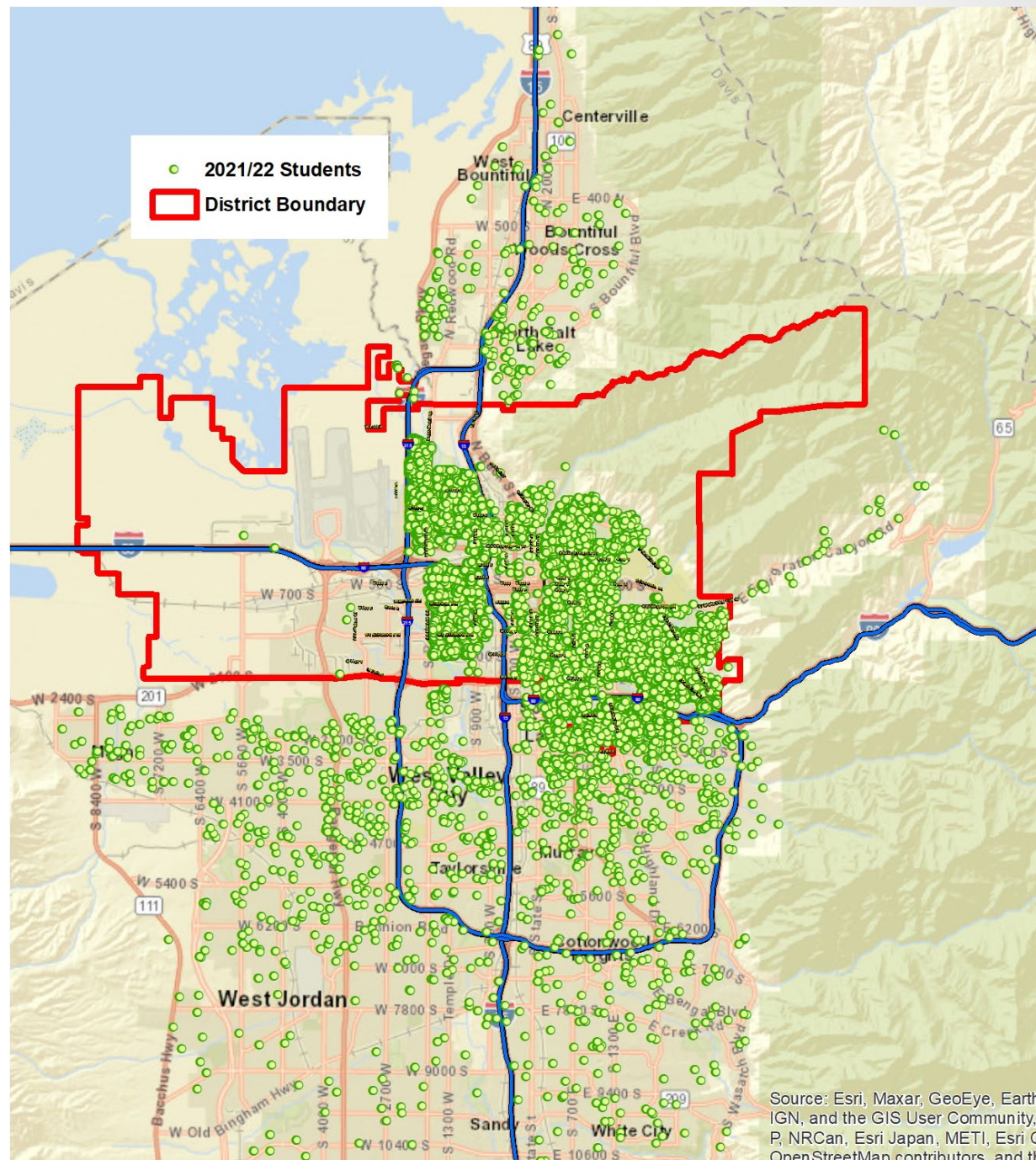
Like total enrollment, the distribution of students by grade cohort was very stable, with noticeable declines beginning with the K-2 group starting to decline in 2014/15.

The decline in the K-2 cohort has continued, advanced through the 3-5 cohort and is now impacting the 6-8 group, however the impact on the 9-12 cohort is expected to be less.

* Non-charter schools only.

Current Students

The District draws nearly 2,300 students from across the metropolitan area, mostly from South Salt Lake and West Valley City.

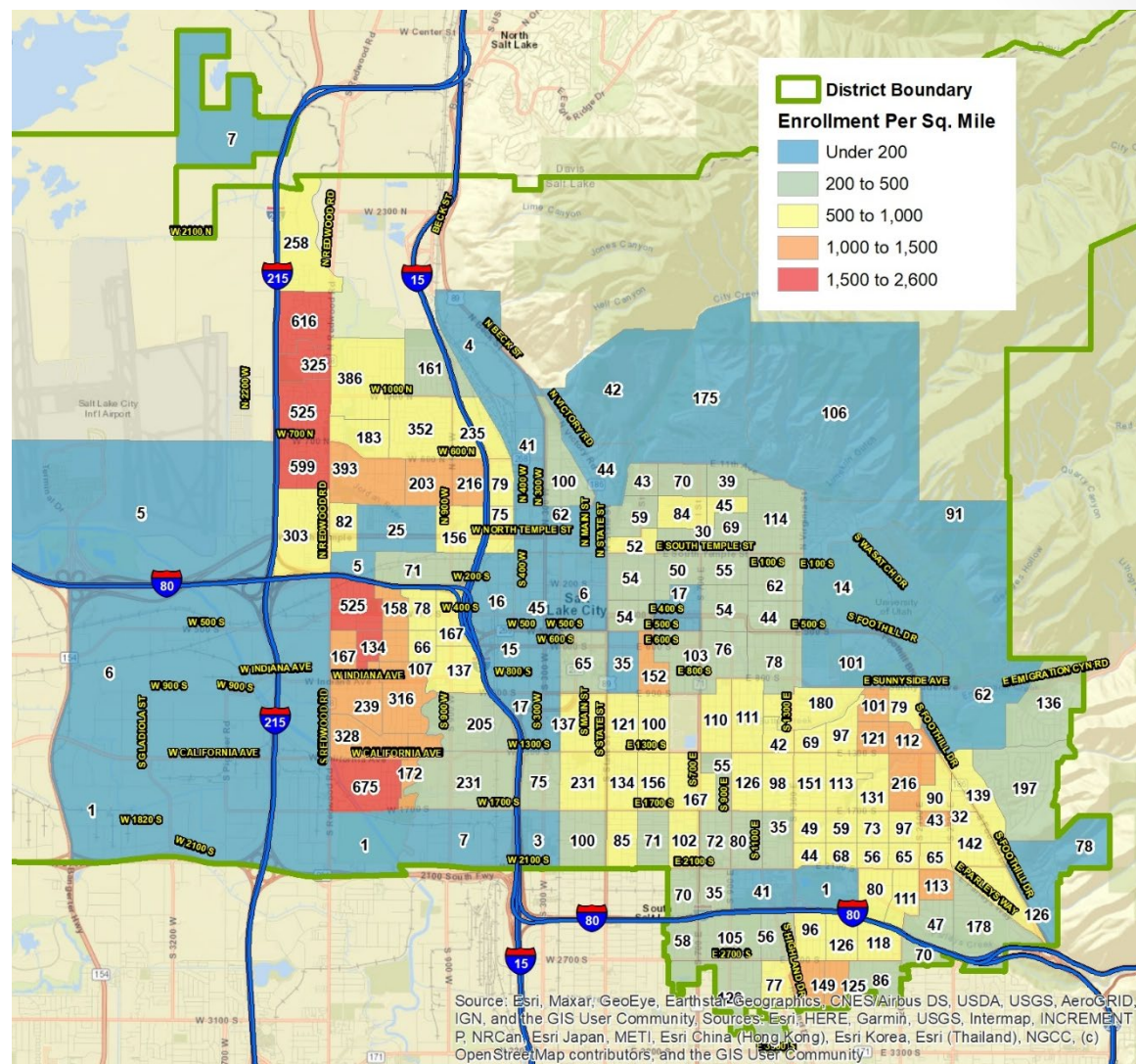


Source: Esri, Maxar, GeoEye, Earth
IGN, and the GIS User Community,
P, NRCAN, Esri Japan, METI, Esri C
OpenStreetMap contributors, and th

Enrollment Density: 2021/22

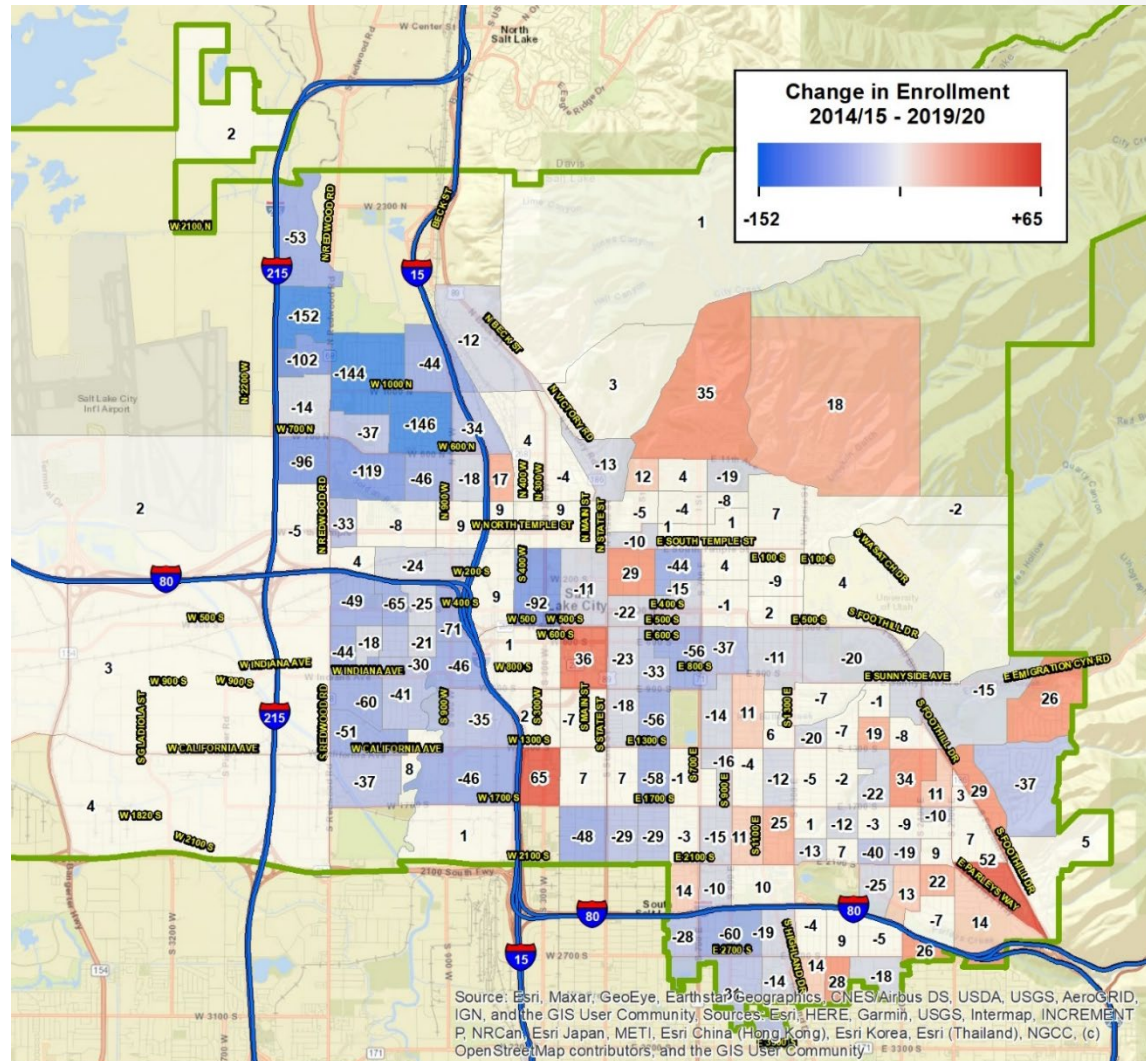
Enrollment density varies from very low levels to higher levels found in suburban areas, such as those along the I-215 Corridor.

The Downtown area has low levels of enrollment while the southeast portion of the District exhibits moderate concentrations of enrollment.



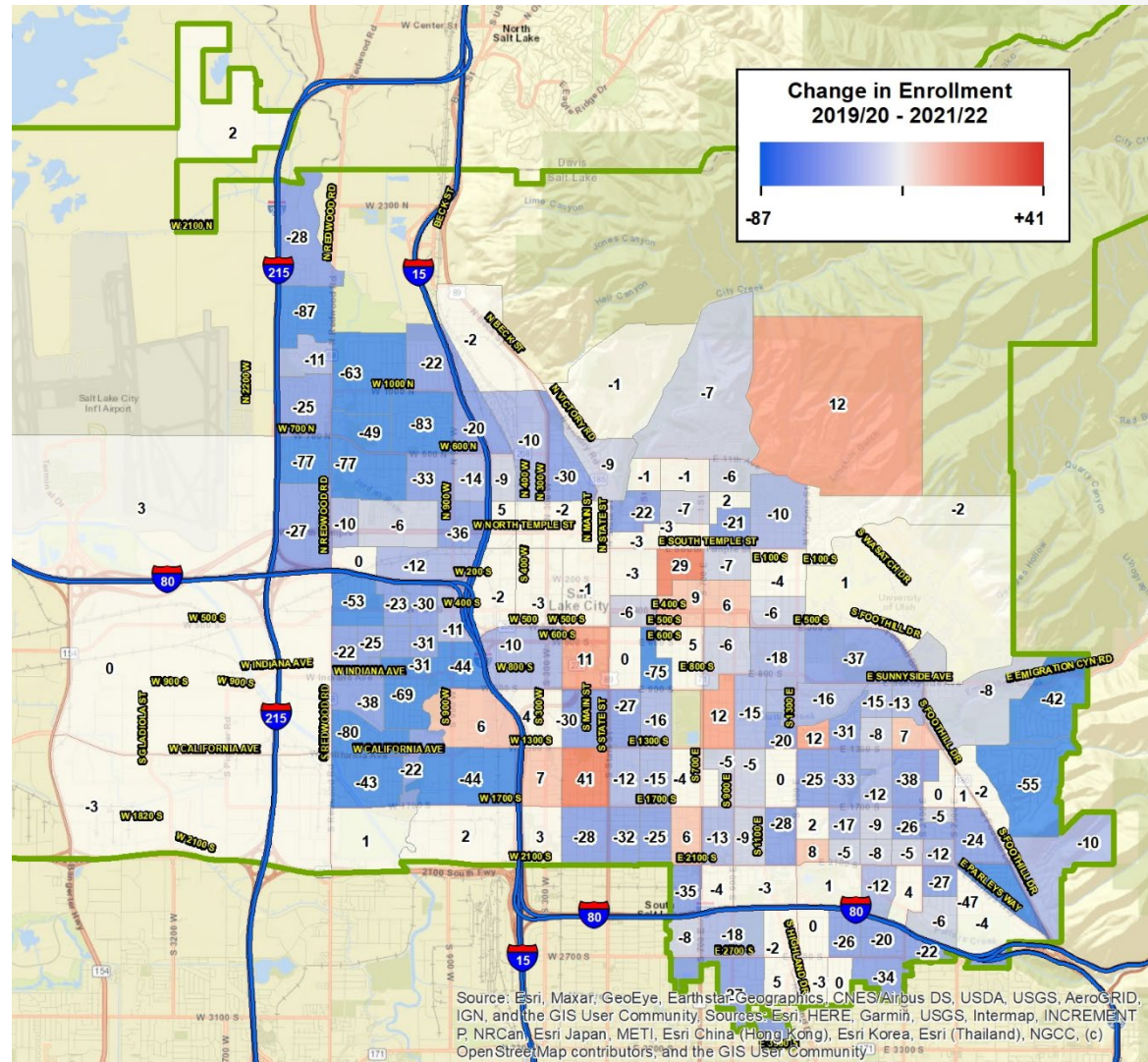
Change in Enrollment - 2014/15 to 2019/20

During the five years prior to 2020/21 (pre-COVID), most of the areas east of I-15 had stable enrollment, while areas west of I-15 were experiencing substantial losses in enrollment.



Change in Enrollment - 2019/20 to 2021/22

The declines since 2019/20 have been much more widespread, however the areas west of I-15 still show the greatest drop in enrollment.



Demographic Trends

	2000 Census	2010 Census	2020 Census	Annual Change*	
				2000-10	2010-20
Population	188,980	186,440	199,719	-0.1%	0.7%
In Households	184,309	181,645	191,786	-0.1%	0.5%
Under 5	23.5% 7.9%	22.5% 7.8%	18.6% 6.3%	-0.3%	-1.4%
5 to 13	11.1%	10.6%	8.9%	-0.6%	-1.0%
14 to 17	4.6%	4.2%	3.4%	-1.0%	-1.5%
18 to 24	15.3%	14.0%	13.8%	-1.0%	0.5%
25 to 44	33.7%	33.8%	35.2%	-0.1%	1.1%
45 to 64	16.4%	20.3%	21.8%	2.0%	1.4%
65 and up	11.1%	9.4%	10.7%	-1.7%	2.0%
Housing Units	80,135	80,724	92,171	0.1%	1.3%
Occupied	92.7%	92.3%	91.5%	0.0%	1.2%
Vacant	7.3%	7.7%	8.5%	0.6%	2.3%
Single Family	54.3%	53.2%	47.6%	-0.1%	0.4%
Multifamily	45.7%	46.8%	52.4%	0.3%	4.2%
Households	74,298	74,513	84,351	0.0%	1.2%
Under 25	43.8% 10.8%	43.3% 9.4%	43.2% 8.1%	-1.4%	-0.2%
25 to 34	24.0%	25.5%	26.0%	0.6%	1.5%
35 to 44	19.8%	17.9%	17.2%	-1.0%	0.9%
45 to 54	16.5%	16.4%	15.7%	-0.1%	0.8%
55 to 64	9.3%	14.6%	15.1%	4.6%	1.6%
65 and up	19.6%	16.4%	17.9%	-1.8%	2.2%
Population Per	2.54	2.50	2.37	-0.16%	-0.6%

Sources: U.S. Bureau of the Census, 2000, 2010 and 2020.

American Community Survey, 2019; Applied Economics, 2021.

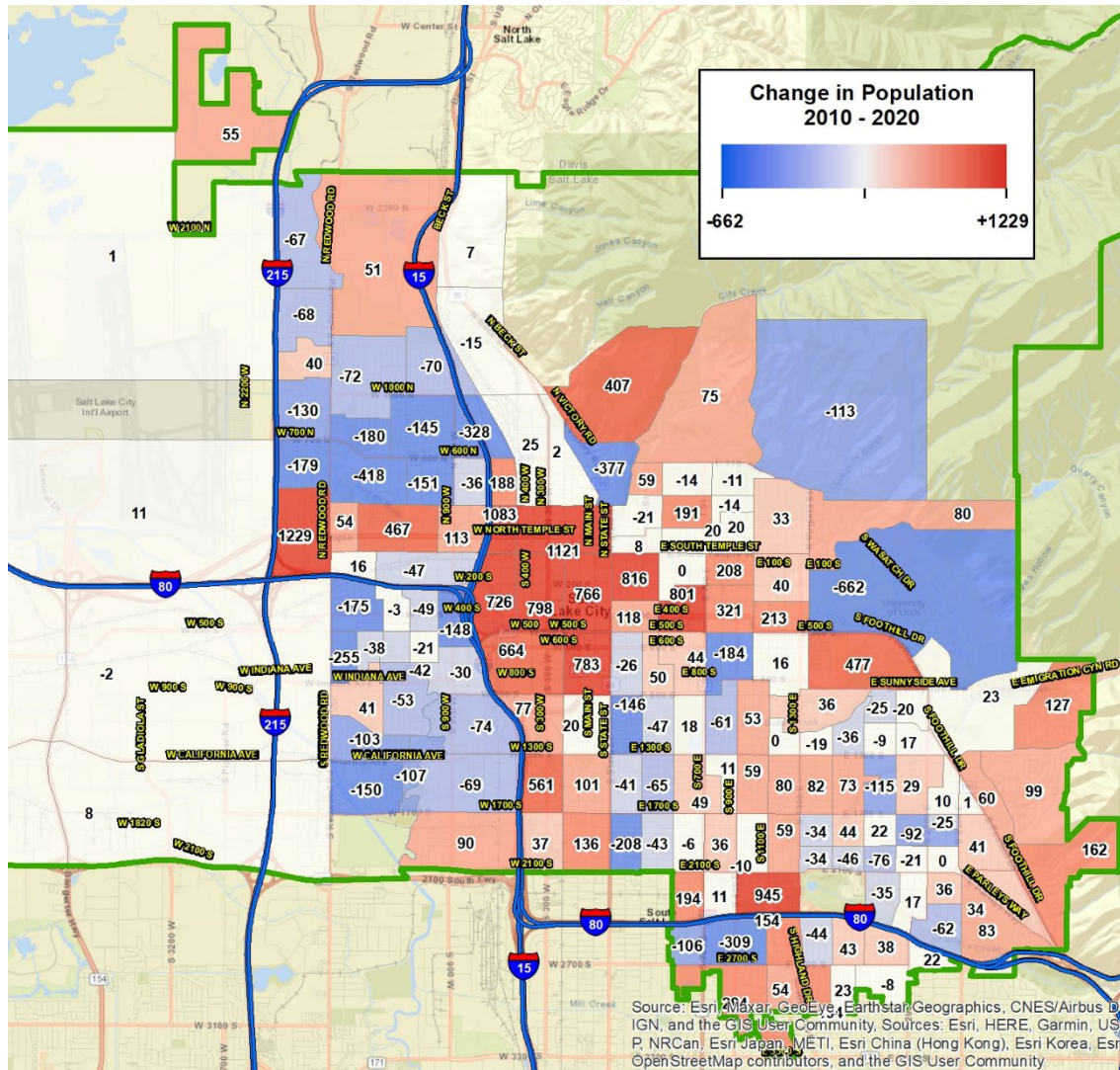
* Compound annual rate of change.

The population of the District grew by over 13,000 people during the 2010's, however 3,000 of those new people were located in group quarters.

The share of the population under 18 years of age has declined more than would be indicated by the change in the share of householders under 45 years, implying an influx of non-family households.

Demographic Trends

Change in Population

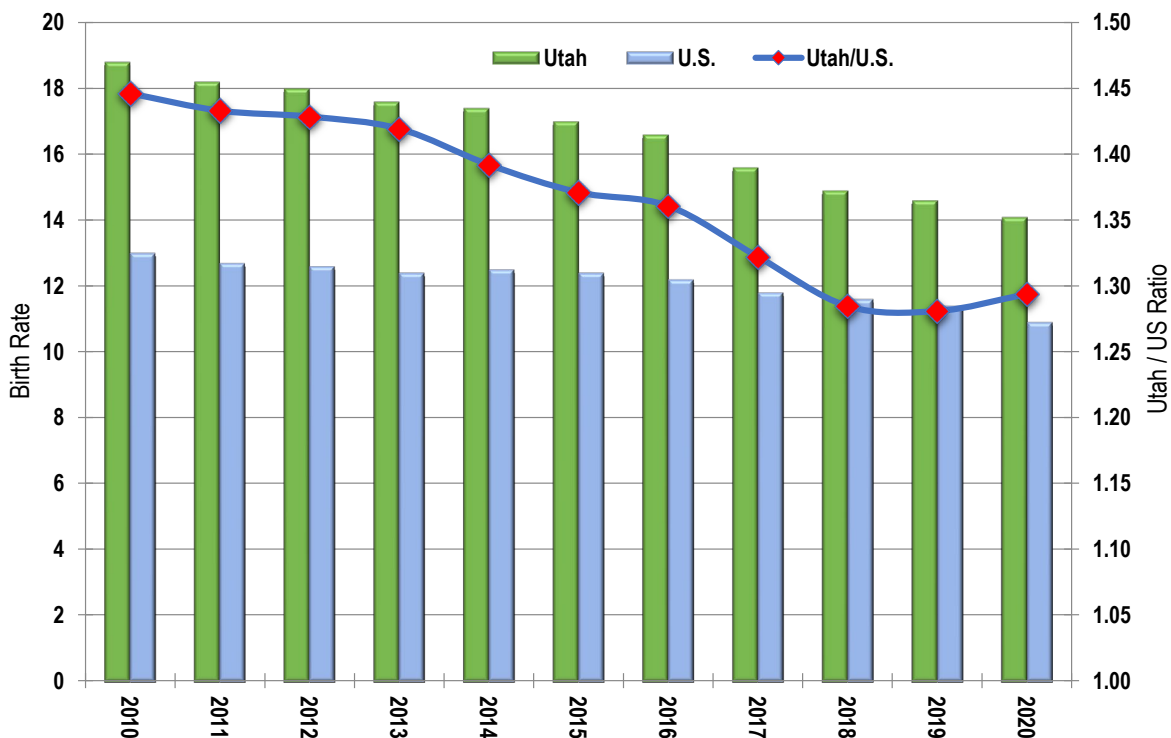


Census data shows total population increasing in downtown and along the light rail corridors, which is not consistent with enrollment trends.

Population declines are evident in the area between I-15 and I-215, which is consistent with enrollment change.

Birth Rate Trends

Births per 1,000 Residents



Population Estimates: National Center for Health Statistics (NCHS) through a collaborative agreement with the U.S. Census Bureau, IBIS Version 2020 Utah Birth Certificate Database, Office of Vital Records and Statistics, Utah Department of Health National

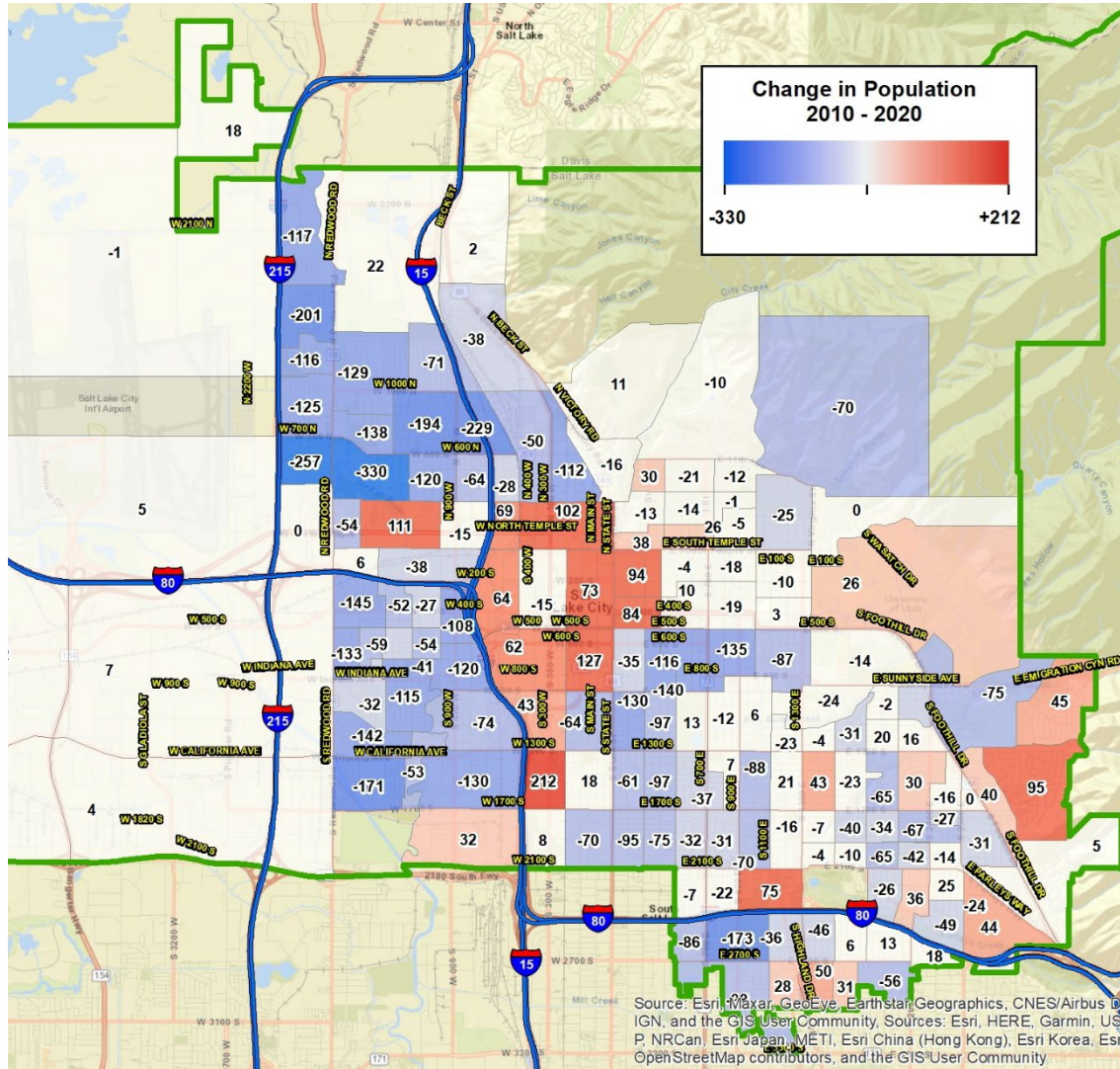
Utah Small Areas	2020 Rate
SLC (Avenues)	8.1
SLC (Downtown) V2	7.9
SLC (Foothill/East Bench)	12.8
SLC (Glendale) V2	15.1
SLC (Rose Park)	12.3
SLC (Southeast Liberty)	9.4
SLC (Sugar House)	11.1

Birth rates in Utah declined by 25% between 2010 and 2020, driven by a 12.3% reduction in the number of births and a total population increase of 15.0%.

Birth rates have been declining nationally, but the rate of decline in Utah has been far greater, closing the difference from the U.S. from 45% to 29%.

Demographic Trends

Change in Population Under 18 years



Since 2010, the population under 18 years increased in the downtown area, although very little (700 to 800 persons) compared to that of the total population.

The decline in the total population west of I-15 since 2010 is also evident in the population under 18 years.

Alternative Providers

Charter Schools

School Name	Address	City	Zip	Grades	2019-20
					Total K-12
City Academy	555 E 200 S	Salt Lake City	84102	7th-12th	148
Dual Immersion Academy	1155 S Glendale Drive	Salt Lake City	84104	K-8th	477
Guadalupe School	1385 N 1200 W	Salt Lake City	84116	K-6th	285
Open Classroom*	134 D Street	Salt Lake City	84103	K-8th	323
Pacific Heritage Academy	1755 W 1100 N	Salt Lake City	84116	K-8th	389
Salt Lake Arts Academy	844 S 200 E	Salt Lake City	84111	5th-8th	408
Salt Lake Center for Science Education*	1400 W Goddwin Avenue	Salt Lake City	84116	9th-12th	392
Salt Lake School for the Performing Arts*	2291 S 2000 E	Salt Lake City	84106	9th-12th	288
Wallace Stegner Academy	980 S Bending River Court	Salt Lake City	84101	K-8th	703
Total					3,413

Source: Utah State Board of Education, School Report Cards; Utah State Charter School Board, Annual Report January 2021; Applied Economics, 2021.

* Schools authorized by the Salt Lake City School District

Private Schools

School Name	Address	City	Zip	Grades	Total K-12
Carden Memorial School	1452 E 2700 S	Salt Lake City	84106	PK-8th	307
Elizabeth Academy	2870 S Connor Street	Salt Lake City	84109	PK-6th	140
J E Cosgriff Memorial Catholic School	2335 E Redondo Avenue	Salt Lake City	84108	PK-8th	312
Judge Memorial Catholic High School	650 S 1100 E	Salt Lake City	84102	9th-12th	720
Montessori Community School of Salt Lake	2416 E 1700 S	Salt Lake City	84108	PK-6th	86
Our Lady of Lourdes Catholic School	1065 E 700 S	Salt Lake City	84102	K-8th	172
Redeemer Lutheran School	1955 E Stratford Avenue	Salt Lake City	84106	K-8th	34
Reid School	2965 E Evergreen Avenue	Salt Lake City	84109	PK-10th	83
Rowland Hall	720 S Guardsman Way	Salt Lake City	84108	PK-12th	857
The Madeleine Choir School	205 E 1st Avenue	Salt Lake City	84103	PK-8th	383
The McGillis School	668 S 1300 E	Salt Lake City	84102	K-8th	438
Total					3,532

Source: NCES Private School Universe Survey 2017-18 school year data; Applied Economics 2021.

Change in Housing Units



The area bounded by I-15 in the west, 300 North in the north, 1000 East in the east and 900 South in the south comprised 60% of the total new housing additions during the 2010's.

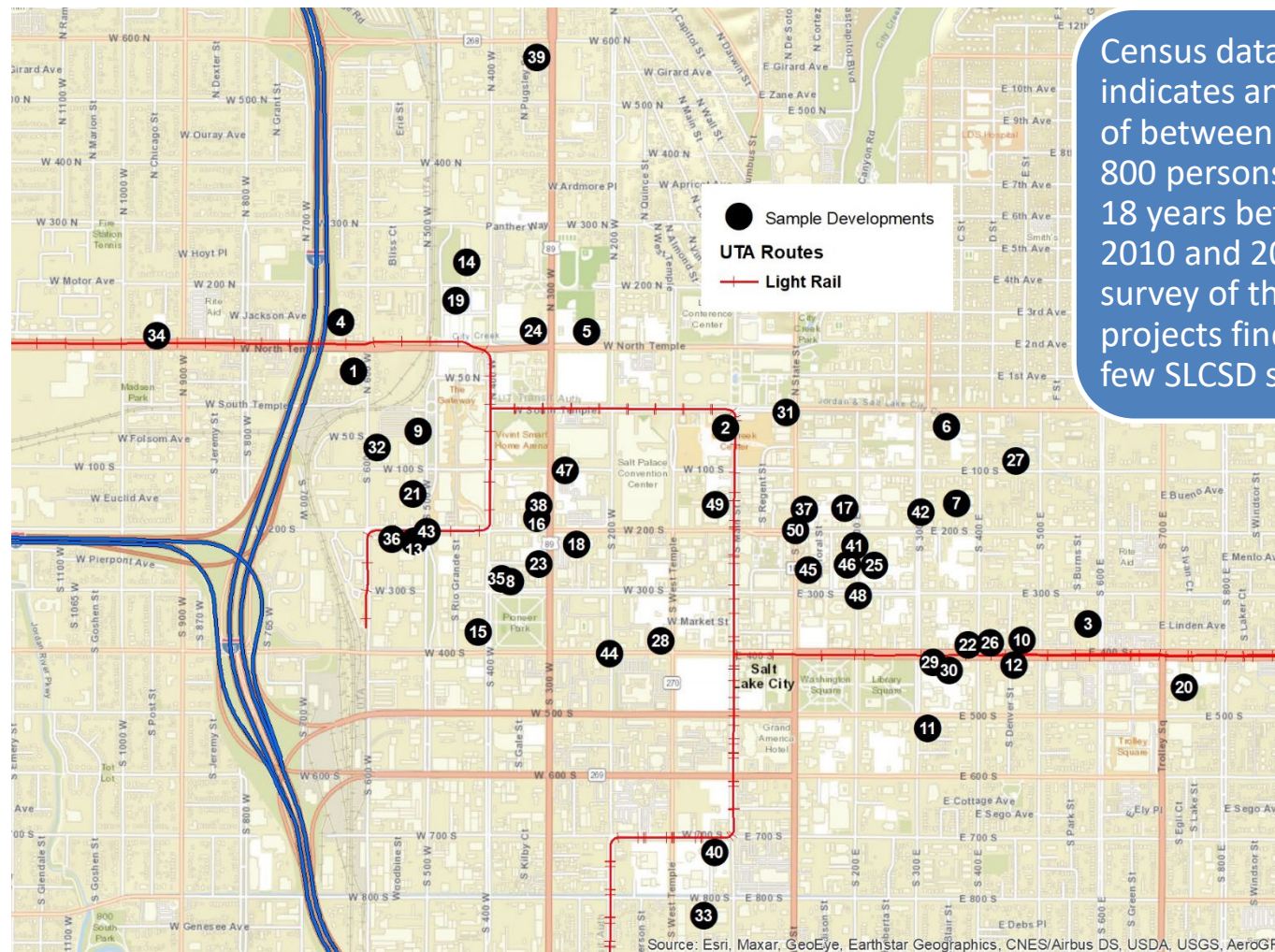
Downtown Area Development *

ID	Name	Address	Units	ID	Name	Address	Units
1	Bridges Apartment Homes	59 N 600 W	295	28	Harmony 390	390 S West Temple	287
2	City Creek Landing	30 Main Street	108	29	Avia Apartments	330 E 400 S	286
3	The Essex	350 S 600 E	181	30	Mya Apartments	447 Blair Street	126
4	644 City Station	644 W North Temple	132	31	Hardison	480 E South Temple	139
5	Season on City Creek	230 W North Temple	114	32	The Beverly	63 S 600 W	48
6	Lotus Apartments	338 E South Temple	84	33	Charli	825 S Richards St	91
7	Cityscape	134 S 400 E	122	34	Fair Park	940 W North Temple	152
8	Broadway Park Lofts	360 W Broadway	86	35	The Olive	378 W Broadway	120
9	Liberty Gateway Apartments	50 S 500 W	160	36	Central Station Apartments	549 W 200 S	65
10	Encore Apartments	489 East 400 S	189	37	Liberty Sky	151 S State Street	272
11	Seasons at Liberty Square	310 E 500 S	119	38	Paperbox Lofts	160 S 300 W	184
12	Velo on the Boulevard	460 E 400 S	99	39	Harvest	588 N 300 W	252
13	Artspace Bridge Project	511 W 200 S	62	40	Seven02 Main	702 E Main St	239
14	4th West	255 N 400 W	493	Open Post 2020			1,974
15	Downtown 360	360 S 400 W	150	41	The Randi	218 S 200 E	61
16	Paragon Station	316 W 200 S	38	42	The Magnolia	165 S 300 E	65
17	Liberty Crest	150 S 200 E	176	43	Central West Apartments	2nd South and 5th West	65
18	Milagro Apartments	241 W 200 S	183	44	The Revival	NEC 400 S 200 W	142
19	Hardware Village	455 W 200 N	453	45	255 S State St	255 S State St	190
20	Liberty Blvd Apartments	455 S 700 E	266	46	MODA Luxe / Rebuild	242 S 200 E	220
21	Gateway 505	505 W 100 S	277	47	The Charles at The West Quarter	251 W 100 S	240
22	Block 44	380 S 400 E	214	48	Kensington Tower	200 E 300 S	359
23	PeirPont by Urbana	315 W Pierpont	87	49	Main Street Apartments	150 S Main Street	400
24	Skyhouse	308 W North Temple	240	50	Astra Tower	NEC State St & 200 S	372
25	The Morton	245 S 200 E	137	Under Construction & Planned			2,114
26	Quattro	385 S 400 E	95	Grand Total			8,734
27	Salt Flats Apartments	447 E 100 S	86				
Sub Total Pre 2020			4,646				

The 4,600 units in a sample of projects opening between 2010 and 2019 are home to less than 100 Salt Lake City School District students; newly opened and future projects are set to add another 4,000 units.

* This list of projects is just a sample and is not intended to be comprehensive; it likely contains some errors since the data were collected from a large number of on-line sources.

Downtown Area Development *



Census data indicates an increase of between 700 and 800 persons under 18 years between 2010 and 2020, yet a survey of the major projects finds very few SLCS students.

* This list of projects is just a sample and is not intended to be comprehensive; it likely contains some errors since the data were collected from a large number of on-line sources.

Demographic Projections

Year	Population	Housing Units		Occupancy Rate	Vacant Units	Households		Pop/HH
		Total*	New			Total	Change	
2000/01	184,309	80,135		92.7%	5,837	74,298		2.481
2010/11	181,645	80,724		92.3%	6,211	74,513		2.438
2011/12	182,289	81,324	600	92.2%	6,322	75,002	489	2.430
2012/13	183,373	82,124	800	92.1%	6,449	75,675	673	2.423
2013/14	184,890	83,124	1,000	92.1%	6,593	76,531	856	2.416
2014/15	186,614	84,224	1,100	92.0%	6,747	77,477	946	2.409
2015/16	188,543	85,424	1,200	91.9%	6,911	78,513	1,036	2.401
2016/17	190,894	86,824	1,400	91.8%	7,093	79,731	1,218	2.394
2017/18	193,224	88,224	1,400	91.8%	7,277	80,947	1,216	2.387
2018/19	195,533	89,624	1,400	91.7%	7,463	82,161	1,214	2.380
2019/20	197,604	90,924	1,300	91.6%	7,643	83,281	1,120	2.373
2020/21	199,719	92,171	1,247	91.5%	7,820	84,351	1,070	2.368
2021/22	200,851	93,139	968	91.4%	8,010	85,129	778	2.359
2022/23	201,937	94,187	1,049	91.2%	8,288	85,899	770	2.351
2023/24	202,816	95,129	942	91.0%	8,562	86,567	669	2.343
2024/25	204,590	96,322	1,193	91.0%	8,669	87,653	1,085	2.334
2025/26	206,873	97,796	1,475	91.0%	8,802	88,994	1,342	2.325
2026/27	209,004	99,193	1,397	91.0%	8,927	90,265	1,271	2.315
2027/28	210,633	100,318	1,125	91.0%	9,029	91,289	1,024	2.307
2028/29	211,848	101,218	900	91.0%	9,110	92,108	819	2.300
2029/30	212,922	102,043	825	91.0%	9,184	92,859	751	2.293
2030/31	213,857	102,793	750	91.0%	9,251	93,541	683	2.286
2031/32	214,652	103,468	675	91.0%	9,312	94,155	614	2.280
2022/23 - 2031/32			10,329				9,027	

Source: Applied Economics, 2021.

** Units in age-restricted and age-targeted communities.

Bolding Indicates Actuals

The number of new housing units is expected to increase by about 1,000 units per year; multifamily units will comprise nearly all of this increase.

Development and demographic conditions indicate that the District's population will rise to nearly 215,000 people by 2031/32 due to the addition of 9,000 new households.

School-Age Population and Enrollment

Year	Households	School-Age Population *		K-12 Enrollment **		Net Difference	E-P Ratio	Out-of District	Service Rate
		Total	Per Household	Total	Per Household				
2000/01	74,298	29,627	0.399	23,930	0.322	5,697	0.81		
2010/11	74,513	27,551	0.370	23,140	0.311	4,411	0.84		
2011/12	75,002	27,079	0.361	22,996	0.307	4,083	0.85		
2012/13	75,675	26,678	0.353	22,897	0.303	3,781	0.86		
2013/14	76,531	26,344	0.344	23,072	0.301	3,272	0.88	1,574	81.6%
2014/15	77,477	26,042	0.336	22,757	0.294	3,285	0.87	1,649	81.1%
2015/16	78,513	25,769	0.328	22,809	0.291	2,960	0.89	1,819	81.5%
2016/17	79,731	25,552	0.320	22,230	0.279	3,322	0.87	1,887	79.6%
2017/18	80,947	25,331	0.313	22,077	0.273	3,254	0.87	1,977	79.3%
2018/19	82,161	25,105	0.306	21,608	0.263	3,497	0.86	2,089	77.7%
2019/20	83,281	24,848	0.298	21,297	0.256	3,551	0.86	2,197	76.9%
2020/21	84,351	24,575	0.291	19,919	0.236	4,656	0.81	2,265	71.8%
2021/22	85,129	24,305	0.286	19,571	0.230	4,734	0.81	2,283	71.1%
2022/23	85,899	24,034	0.280	19,303	0.225	4,731	0.80	2,228	71.0%
2023/24	86,567	23,737	0.274	19,067	0.220	4,670	0.80	2,211	71.0%
2024/25	87,653	23,554	0.269	18,786	0.214	4,768	0.80	2,246	70.2%
2025/26	88,994	23,436	0.263	18,485	0.208	4,951	0.79	2,288	69.1%
2026/27	90,265	23,295	0.258	18,254	0.202	5,041	0.78	2,328	68.4%
2027/28	91,289	23,088	0.253	17,940	0.197	5,148	0.78	2,345	67.5%
2028/29	92,108	22,830	0.248	17,704	0.192	5,126	0.78	2,366	67.2%
2029/30	92,859	22,555	0.243	17,450	0.188	5,105	0.77	2,344	67.0%
2030/31	93,541	22,267	0.238	17,254	0.184	5,013	0.77	2,350	66.9%
2031/32	94,155	21,965	0.233	16,918	0.180	5,047	0.77	2,304	66.5%

Source: Applied Economics, September 2021.

* Population age 5 through 17, corresponds with Kindergarten through 12th grade.

** Excludes charter schools.

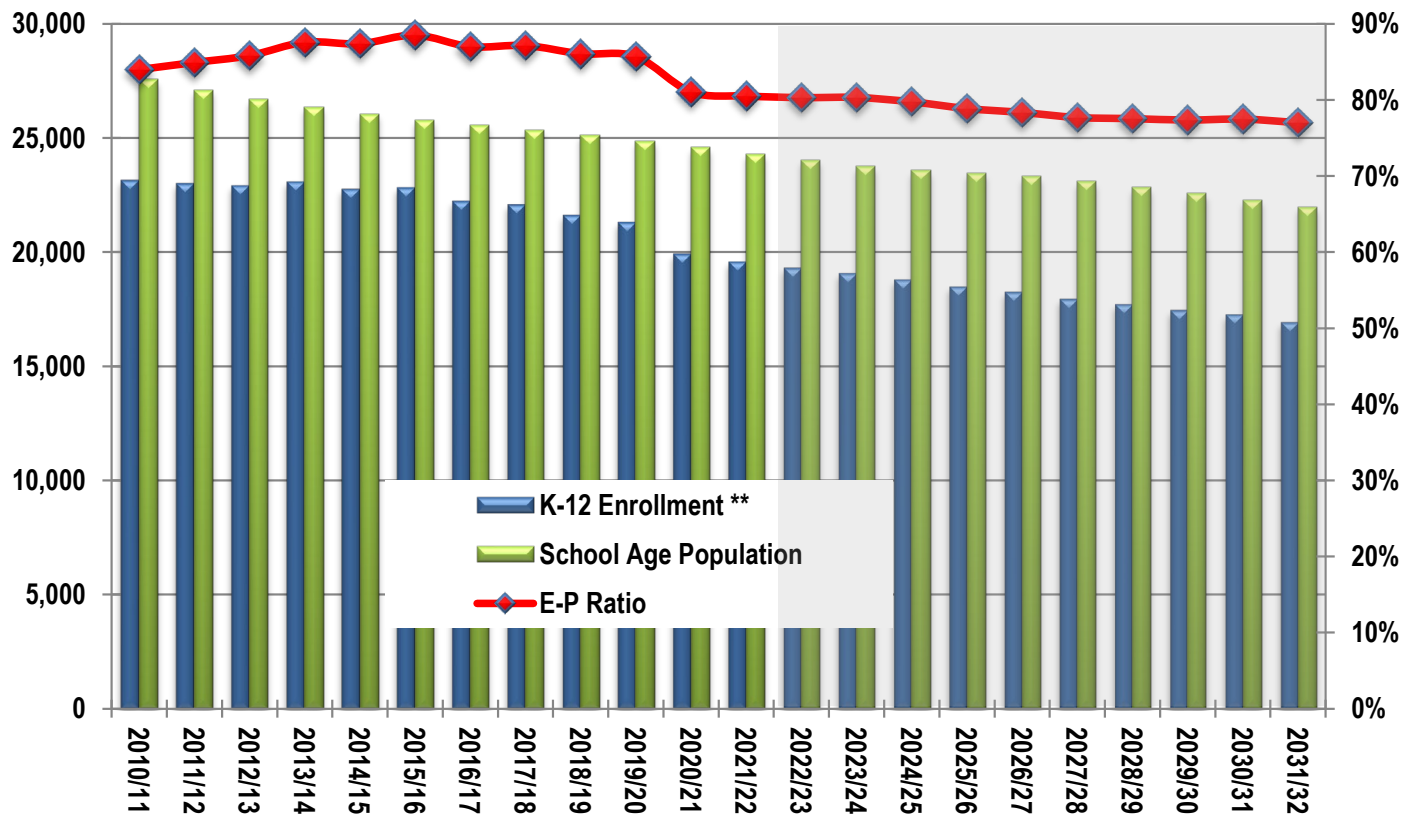
Bolding indicates historical data.

**-2,650
(13.6%)**

The difference between the District's school-age population and enrollment jumped in 2020/21 due to COVID, but it is not expected to continue to rise significantly.

The demographics indicate a decline of about 2,400 school-age persons over the next 10 years; this translates into a 2,650-student decline in non-charter K-12 enrollment.

School-Age Population and Enrollment



Sources: Salt Lake City School District; Applied Economics, 2022.

The enrollment projections assume that the District's Enrollment-Population (E-P) ratio will decline at approximately the same rate that it did between 2015/16 and 2019/20.

Enrollment Projections

Fall	PS	Enrollment by Level				K-12 Total		
		K-6	7-8	K-8	9-12	Enrollment	Change	% Change
2010/11	832	13,715	3,080	16,795	6,345	23,140	233	1.0%
2011/12	923	13,735	3,002	16,737	6,259	22,996	-144	-0.6%
2012/13	862	13,536	3,003	16,539	6,358	22,897	-99	-0.4%
2013/14	896	13,691	3,123	16,814	6,258	23,072	175	0.8%
2014/15	859	13,363	3,025	16,388	6,369	22,757	-315	-1.4%
2015/16	813	13,108	3,155	16,263	6,546	22,809	52	0.2%
2016/17	844	12,530	3,138	15,668	6,562	22,230	-579	-2.5%
2017/18	784	12,134	3,107	15,241	6,836	22,077	-153	-0.7%
2018/19	793	11,775	3,131	14,906	6,702	21,608	-469	-2.1%
2019/20	721	11,367	3,186	14,553	6,744	21,297	-311	-1.4%
2020/21	617	9,991	3,052	13,043	6,876	19,919	-1,378	-6.5%
2021/22	443	9,809	3,035	12,844	6,727	19,571	-348	-1.7%
2022/23	437	9,611	2,915	12,526	6,777	19,303	-268	-1.4%
2023/24	432	9,429	2,703	12,132	6,935	19,067	-236	-1.2%
2024/25	426	9,365	2,554	11,919	6,867	18,786	-281	-1.5%
2025/26	419	9,239	2,519	11,758	6,727	18,485	-301	-1.6%
2026/27	414	9,169	2,613	11,782	6,472	18,254	-231	-1.2%
2027/28	407	9,149	2,541	11,690	6,250	17,940	-314	-1.7%
2028/29	402	9,005	2,509	11,514	6,190	17,704	-236	-1.3%
2029/30	396	8,827	2,551	11,378	6,072	17,450	-254	-1.4%
2030/31	392	8,616	2,515	11,131	6,123	17,254	-196	-1.1%
2031/32	384	8,373	2,479	10,852	6,066	16,918	-336	-1.9%

Source: Applied Economics, 2021.

Bolding indicates actuals.

-1,436
(15%)

-556
(18%)

-660
(10%)

The projected decline in enrollment is expect to be most pronounced at the middle school level (18%), while only a 10% decline is projected at the high school level.

Enrollment by Attendance Area

Attendance Area	Actual			Projections		Change			
	2014/15	2019/20	2021/22	2026/27	2031/32	2014-19	2019-21	2021-26	2026-31
Elementary (K-6):									
Backman	558	415	315	269	249	-143	-100	-46	-20
Beacon Heights	362	395	334	275	255	33	-61	-59	-20
Bennion	358	253	232	224	203	-105	-21	-8	-20
Bonneville	509	457	380	348	322	-52	-77	-32	-26
Dilworth	518	425	349	345	310	-93	-76	-4	-35
Edison	718	562	456	424	382	-156	-106	-32	-42
Emerson	353	328	296	311	282	-25	-32	15	-28
Ensign	380	362	317	287	264	-18	-45	-30	-24
Escalante	509	444	423	411	371	-65	-21	-12	-39
Franklin	461	338	258	243	225	-123	-80	-15	-19
Hawthorn	312	280	231	194	177	-32	-49	-37	-16
Highland Park	553	496	409	412	377	-57	-87	3	-35
Indian Hills	412	394	295	246	225	-18	-99	-49	-21
Jackson	504	433	381	389	356	-71	-52	8	-33
Lincoln	534	446	344	331	309	-88	-102	-13	-23
Meadowlark	624	526	425	315	288	-98	-101	-110	-28
Mountain View	684	578	473	457	412	-106	-105	-16	-45
Newman	464	314	263	249	225	-150	-51	-14	-24
Nibley Park K8	457	363	285	253	236	-94	-78	-32	-17
North Star	646	459	383	331	307	-187	-76	-52	-23
Park View	568	441	314	305	283	-127	-127	-9	-22
Riley	524	413	328	280	257	-111	-85	-48	-23
Rose Park	507	345	283	290	263	-162	-62	7	-27
Uintah	576	482	410	405	371	-94	-72	-5	-34
Wasatch	392	339	295	317	291	-53	-44	22	-27
Washington	323	219	179	178	165	-104	-40	-1	-13
Whittier	607	512	439	424	386	-95	-73	-15	-38
Out of District	702	958	949	935	863	256	-9	-14	-72
Sub-total	14,115	11,977	10,046	9,449	8,653	-2,138	-1,931	-597	-796

	Actual			Projections		Change			
Attendance Area	2014/15	2019/20	2021/22	2026/27	2031/32	2014-19	2019-21	2021-26	2026-31
Middle School:									
Bryant	529	525	473	457	444	-4	-52	-16	-13
Clayton	552	618	494	495	450	66	-124	1	-45
Glendale	598	598	560	383	361	0	-38	-177	-23
Hillside	518	585	548	457	477	67	-37	-91	19
Nibley Park K8	116	106	80	78	69	-10	-26	-2	-9
Northwest	923	795	702	544	504	-128	-93	-158	-41
Out of District	153	244	238	278	255	91	-6	40	-23
Sub-total	3,389	3,471	3,095	2,693	2,559	82	-376	-402	-134
High School									
East High	2,104	2,107	2,136	1,972	1,929	3	29	-164	-43
Highland	1,901	2,005	1,992	2,082	1,890	104	-13	90	-192
West High	2,371	2,446	2,353	2,161	1,918	75	-93	-192	-244
Out of District	794	995	1,096	1,067	1,139	201	101	-29	72
Sub-total	7,170	7,553	7,577	7,282	6,876	383	24	-295	-406
Grand Total	24,674	23,001	20,718	19,424	18,088	-1,673	-2,283	-1,294	-1,336

Sources: Salt Lake City Schools; Applied Economics, 2021.

Past and projected enrollment by attendance area shows widespread losses, particularly at the elementary and middle school levels.

Conclusions

Although the District is experiencing significant growth in housing and population, the nature of that growth greatly limits the impact on the District's school-age population.

The area at the heart of the District is gentrifying; an aging population and declining household sizes are amplifying the overall decline in birth rates being experienced in Utah and the U.S.

Multifamily construction activity has skyrocketed over the past dozen years, however the projects generally do not offer amenities to, and are too expensive for, families with children.

The rise of online schools, the presence of charter schools and open enrollment policies are causing the share of the school-age population being served by the District to decline.

Enrollment is projected to decline steadily throughout the projection period, but opportunities may exist to mitigate the amount of that decline.