TRANSITIONS
POPULATION AND ECONOMIC TRENDS FOR COLORADO AND REGION 9

For SWCCOG

Elizabeth Garner
State Demography Office

October 2017

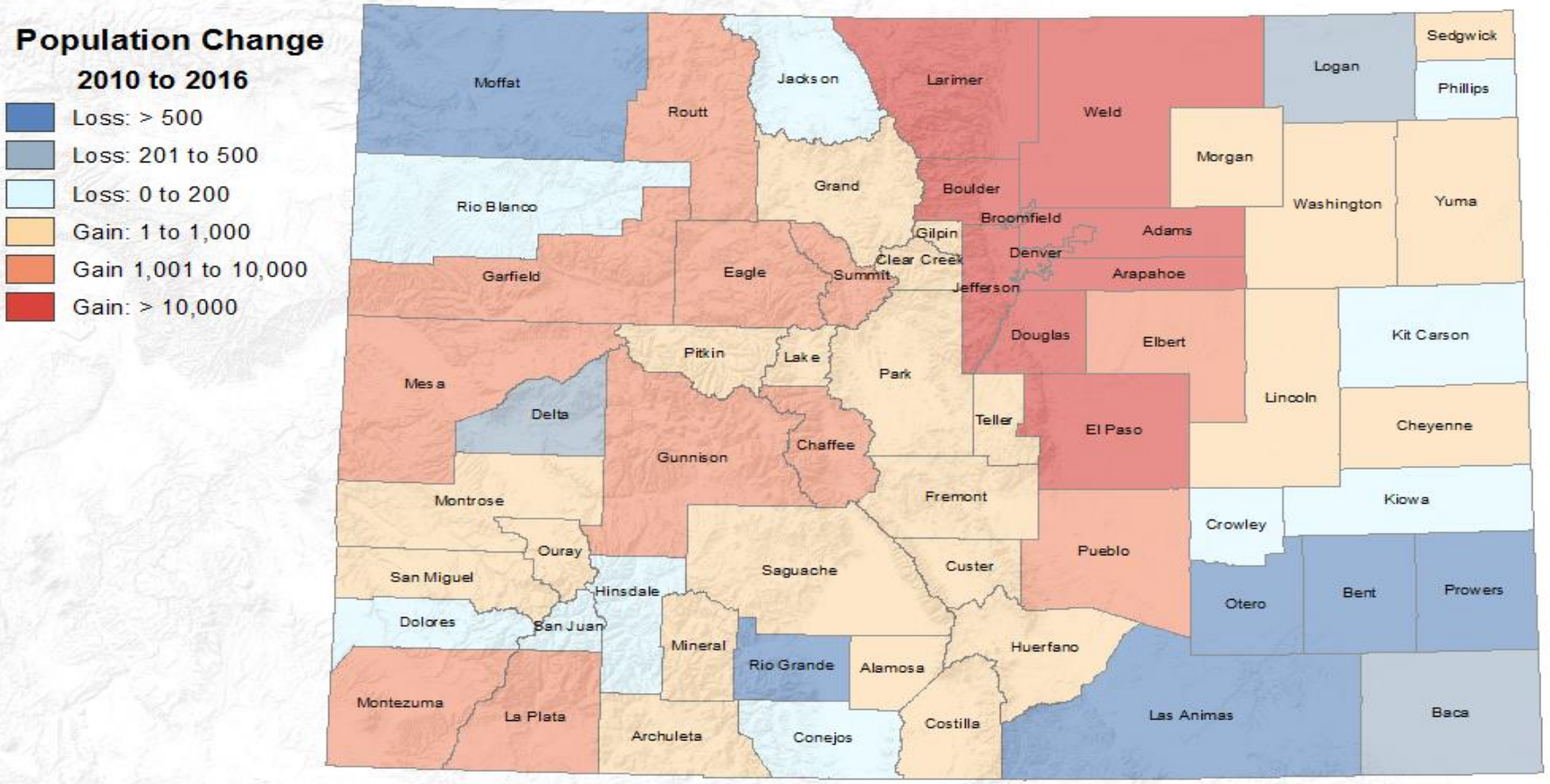
Transitions to Watch

- Migration – attracting and retaining the best and brightest. Can we continue to do it? And, where do we put them??
- Disparate growth across the state.
- Industrial transitions – retail, manuf. const.
- Aging – impacts everything… including the economy.
- Increase racial and ethnic diversity.
- Slowing income growth
- Growing and slowing population – National factors

Big Picture - 2015-2016 Pop Change

- US – 323.1 million, + 2.2 million or **.7%**
- Colorado - 5,540,500
- Ranked 7th fastest **1.7%** - UT, NV, ID, FL, WA, OR
- 8th absolute growth **91,700** – TX, FL, CA, WA, AZ, NC, GA
- Range in Colorado
    - +14,000
    - -50

Colorado: Total Population Change
2010 - 2016



Colorado State Demography Office, 03/31/2017

Sources: Esri, USGS, NOAA

2010- 2016 Population Changes

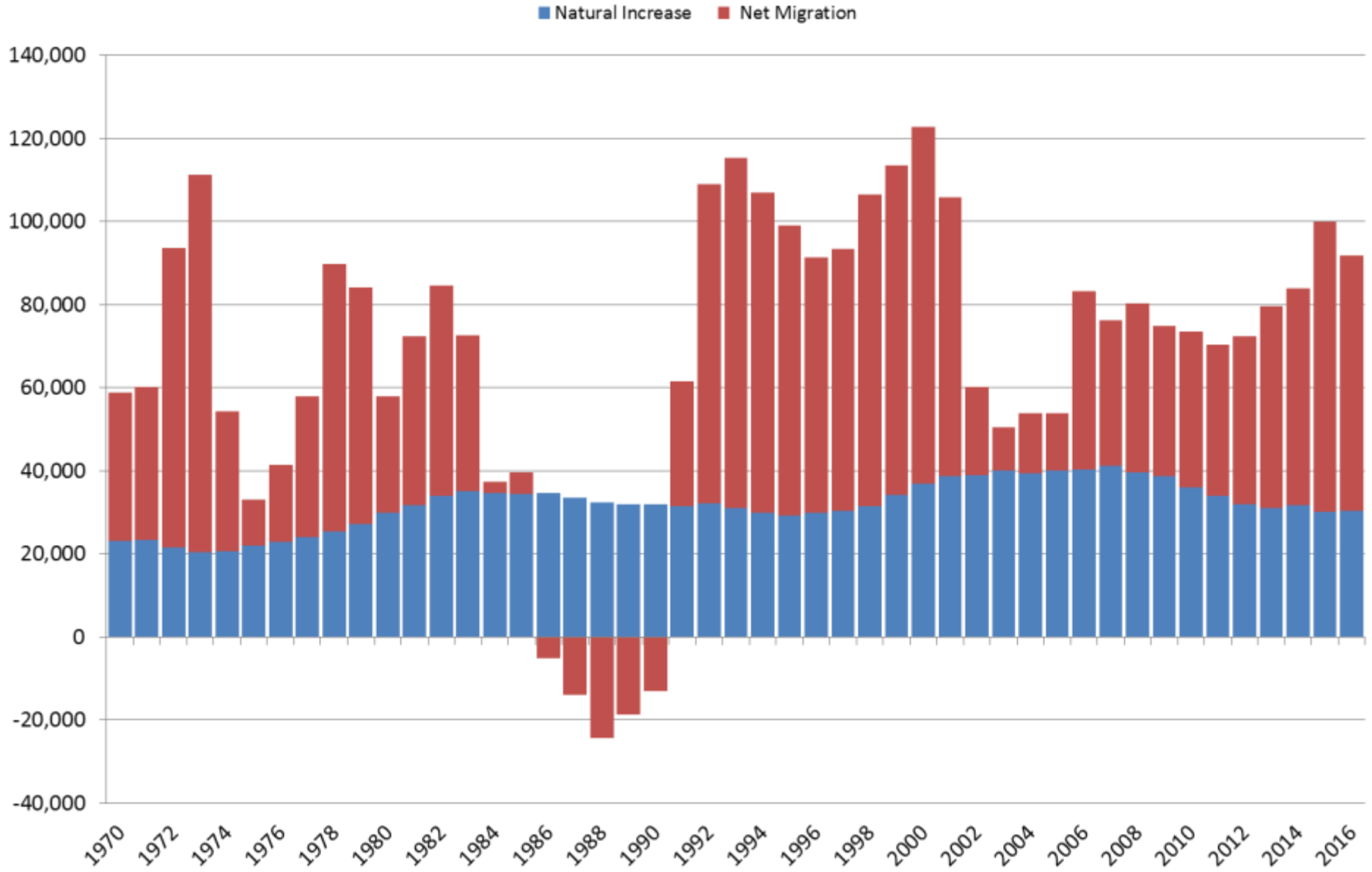
Area	2016 Population	Change from 2010	2010 to 2016 Growth Rate
Colorado	5,538,200	487,848	8.81%
Archuleta	12,417	847	6.56%
Dolores	1,972	-25	-1.23%
La Plata	54,857	4,256	7.64%
Montezuma	26,129	1,374	5.11%
San Juan	696	-11	-1.58%
Region 9	98,243	6,441	6.56%

Region 9 Housing

Change in Housing Condition 2010-2016

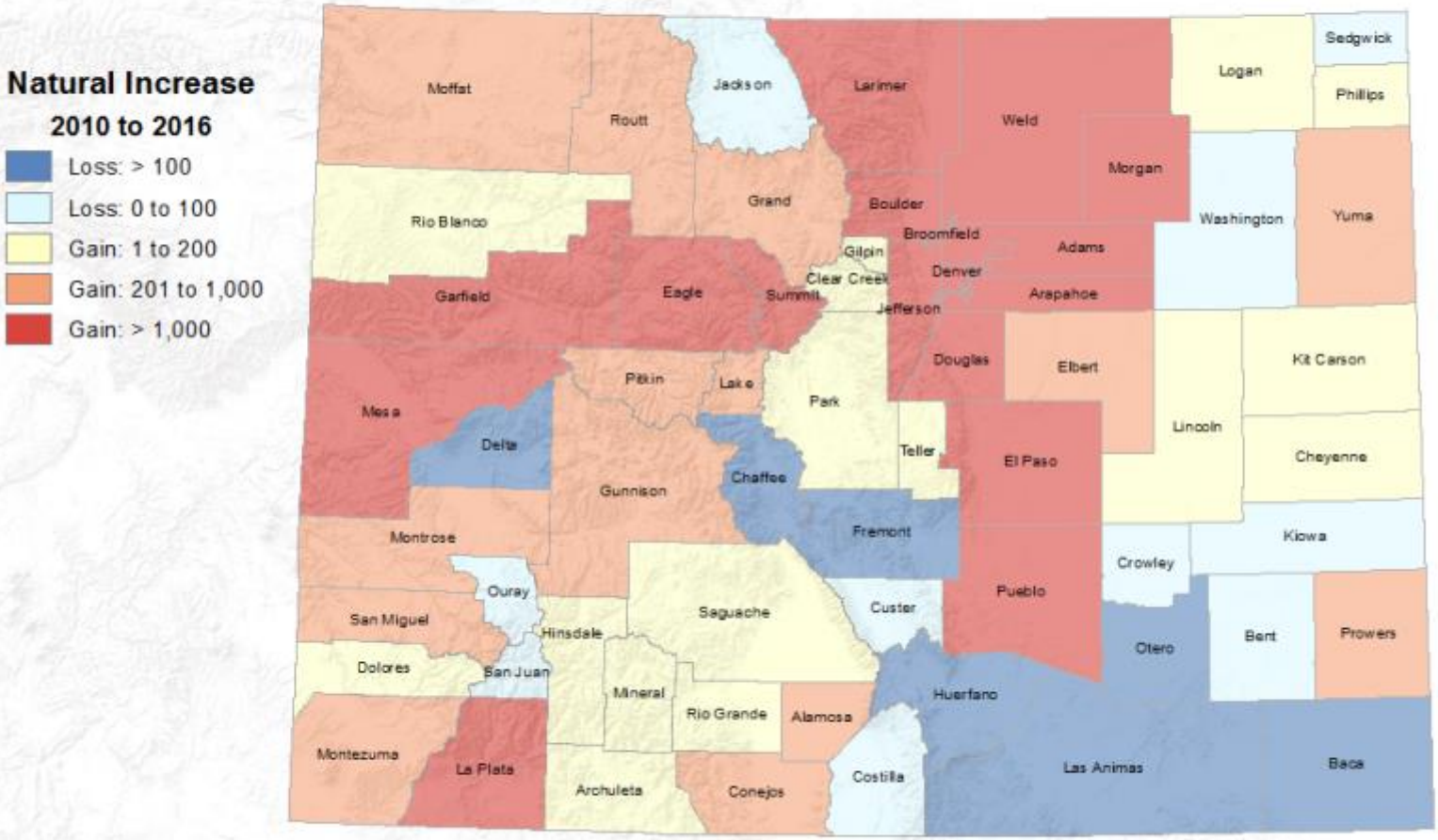
Variable	Archuleta	Dolores	La Plata	Montezuma	San Juan	Region 9
Total Housing Unit Change	427	8	1,487	127	14	2,063
Occupied Housing Units/Households	372	(12)	1,707	575	(6)	2,636
Vacant Housing Units	55	20	(220)	(448)	20	(573)

Components of Colorado Population Change 1970-2016



Colorado: Natural Increase

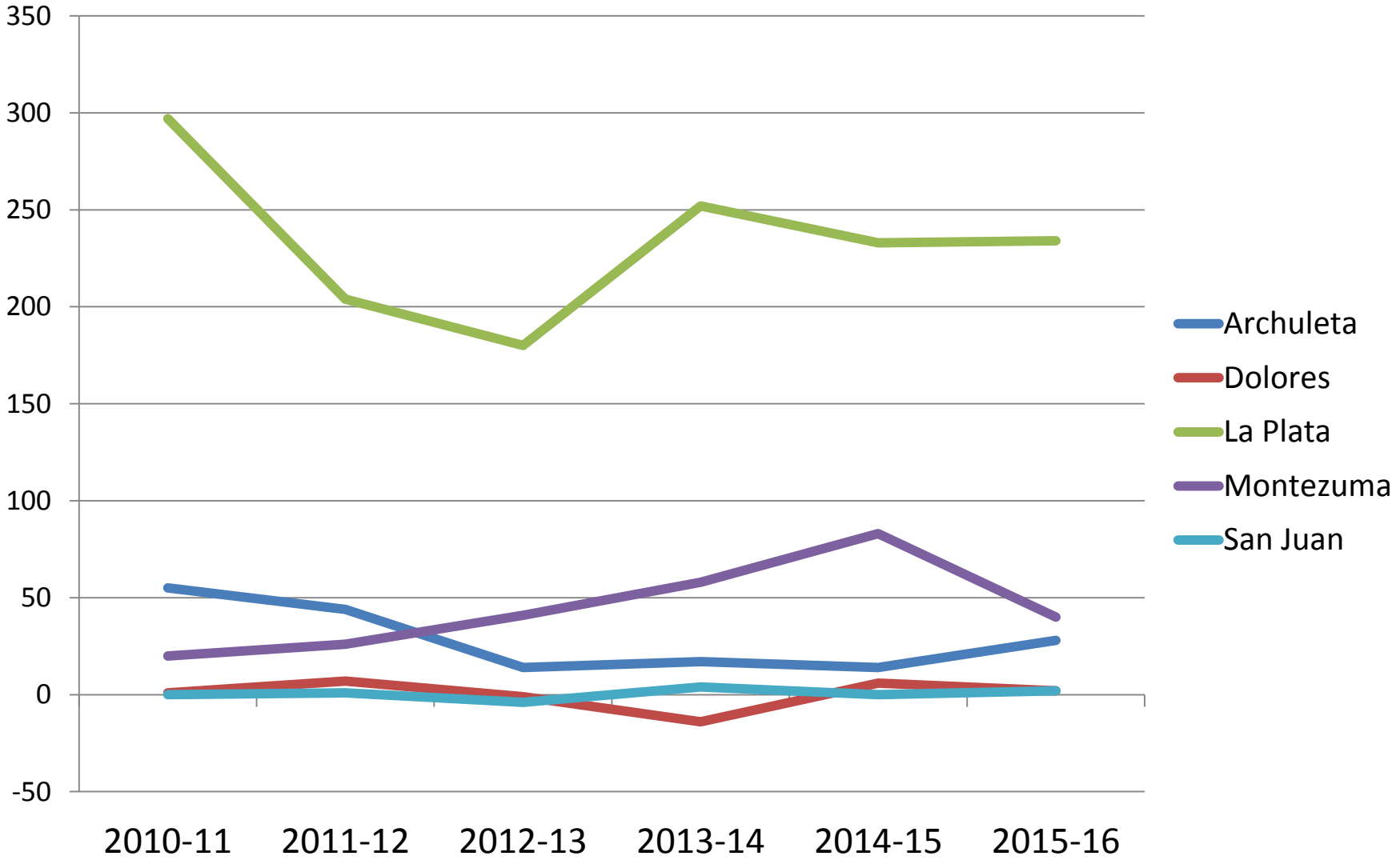
2010 - 2016



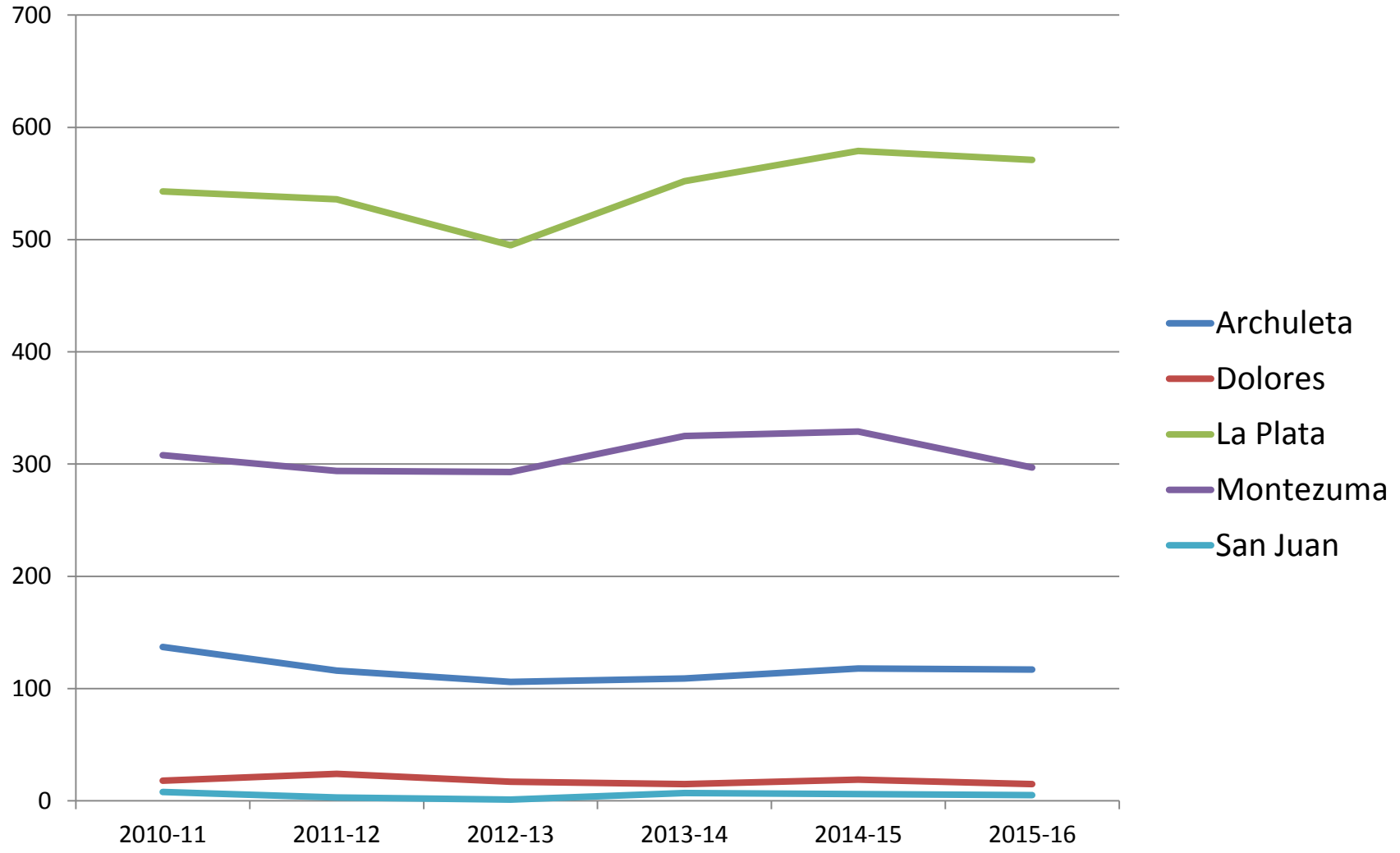
Colorado State Demography Office, 03/31/2017

Sources: Esri, USGS, NOAA

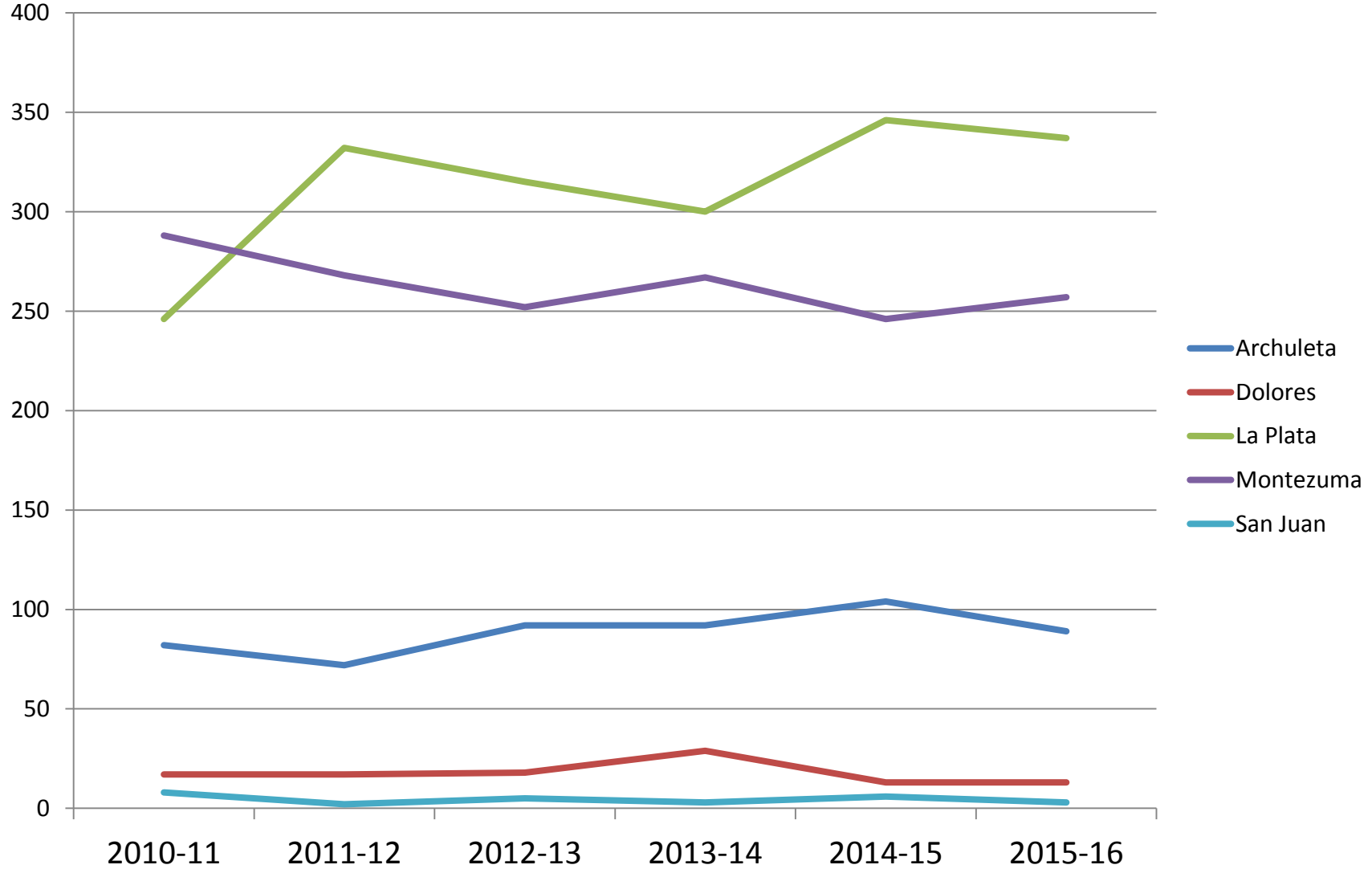
Natural Increase Region 9 Total



Births by County 2010-16

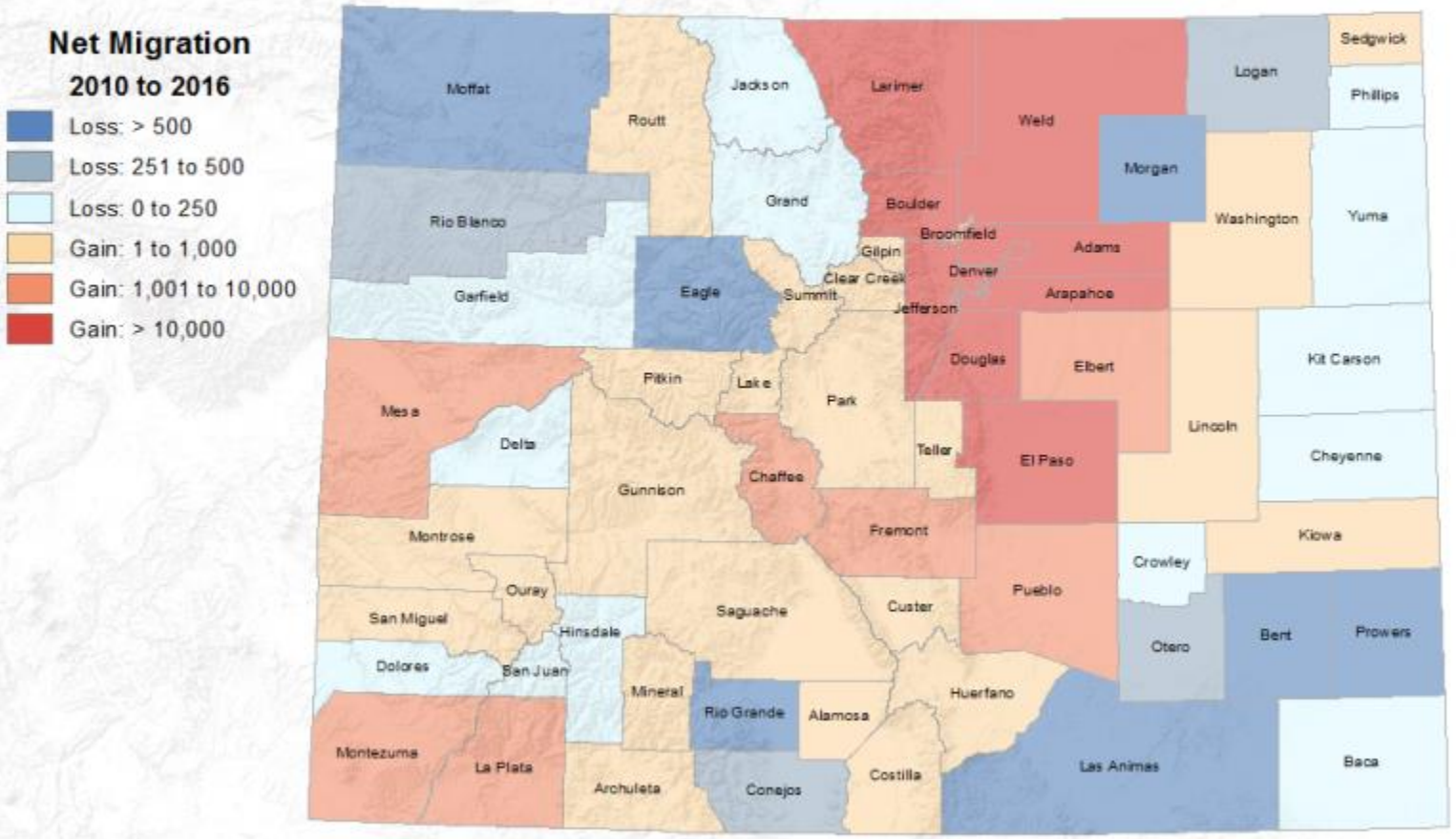


Deaths by County 2010-16



Colorado: Net Migration

2010 - 2016



Colorado State Demography Office, 03/31/2017

Sources: Esri, USGS, NOAA

2010-16 Net Migration

	2011	2012	2013	2014	2015	2016	Total
Archuleta	(112)	62	88	30	145	462	675
Dolores	(36)	(42)	32	(42)	1	61	(26)
La Plata	128	387	768	321	646	606	2,856
Montezuma	(89)	(48)	178	88	240	737	1,106
San Juan	(16)	(2)	12	15	(23)	-	(14)
Region 9	(125)	357	1,078	412	1,009	1,866	4,597

Colorado State to State Migration

2015 State to State Migration		
In	**Out**	**Net**
California	Texas	California
Texas	California	Illinois
Florida	Arizona	Wisconsin
Illinois	Florida	Virginia
Arizona	Wyoming	Florida

County-to-County Migration: Archuleta and Dolores

Coming to Archuleta from:	Leaving Archuleta for:	Highest Net Migration
Pima County, AZ	Maricopa County, AZ	Pima County, AZ
Rio Arriba County, NM	Jefferson	Rio Arriba County, NM
Arapahoe	Garfield	Jefferson
Kay County, OK	Shasta County, CA	Maricopa County, AZ
Upson County, GA	Chaffee	La Plata

Coming to Dolores from:	Leaving Dolores for:	Highest Net Migration
Montezuma County	Eagle	Morgan County
Yavapai County, AZ	Montezuma	Yavapai County, AZ
Morgan County	Adams	San Miguel County
San Miguel County	Cass County, MN	Coconino County, AZ
Coconino County, AZ	Yavapai County, AZ	Mesa

County-to-County Migration: La Plata and Montezuma

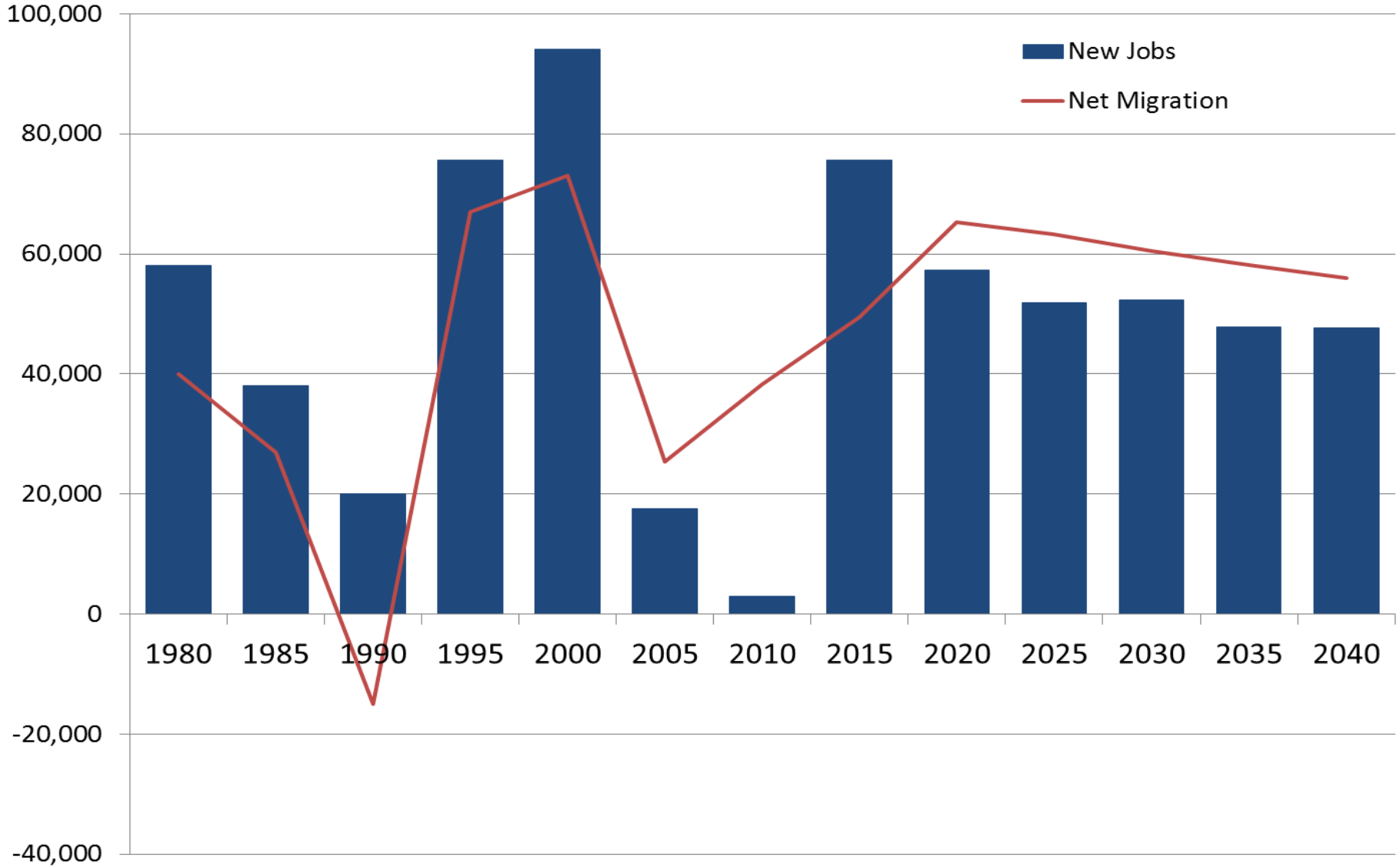
Coming to La Plata from:	Leaving La Plata for:	Highest Net Migration
King County, WA	Jackson County, OR	King County, WA
Maricopa County, AZ	Montezuma	Maricopa County, AZ
El Paso	Mesa	Santa Fe County, NM
San Juan County, NM	Bernalillo County, NM	Grant County, KS
Denver	San Juan County, NM	Bannock County, ID

Coming to Montezuma from:	Leaving Montezuma for:	Highest Net Migration
La Plata	Montrose	La Plata
Hardeman County, TX	Boyd County, KY	Hardeman County, TX
McClain County, OK	La Plata	McClain County, OK
San Juan County, NM	Maricopa County, AZ	San Juan County, NM
Maricopa County, AZ	Ector County, TX	Albemarle County, VA

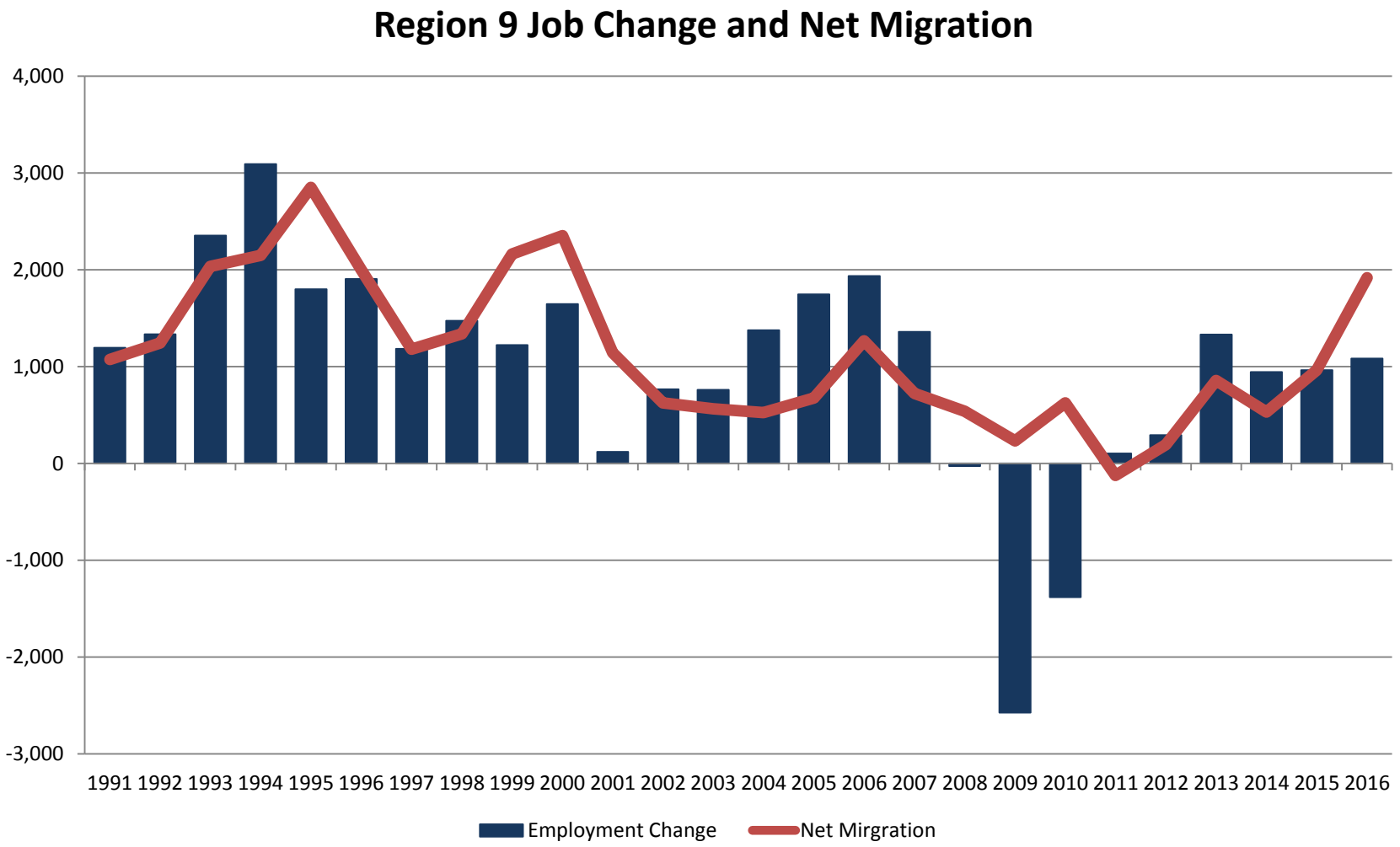
County-to-County Migration: San Juan

Coming to San Juan from:	Leaving San Juan for:	Highest Net Migration
Larimer	Summit	Larimer
Sedgwick County, KS	Adams	Sedgwick County, KS
Cumberland County, ME	Brunswick County, NC	Cumberland County, ME
Saguache	Fresno County, CA	Saguache
Virginia Beach City, VA	Bingham County, ID	Virginia Beach City, VA

Colorado New Jobs and Net Migration

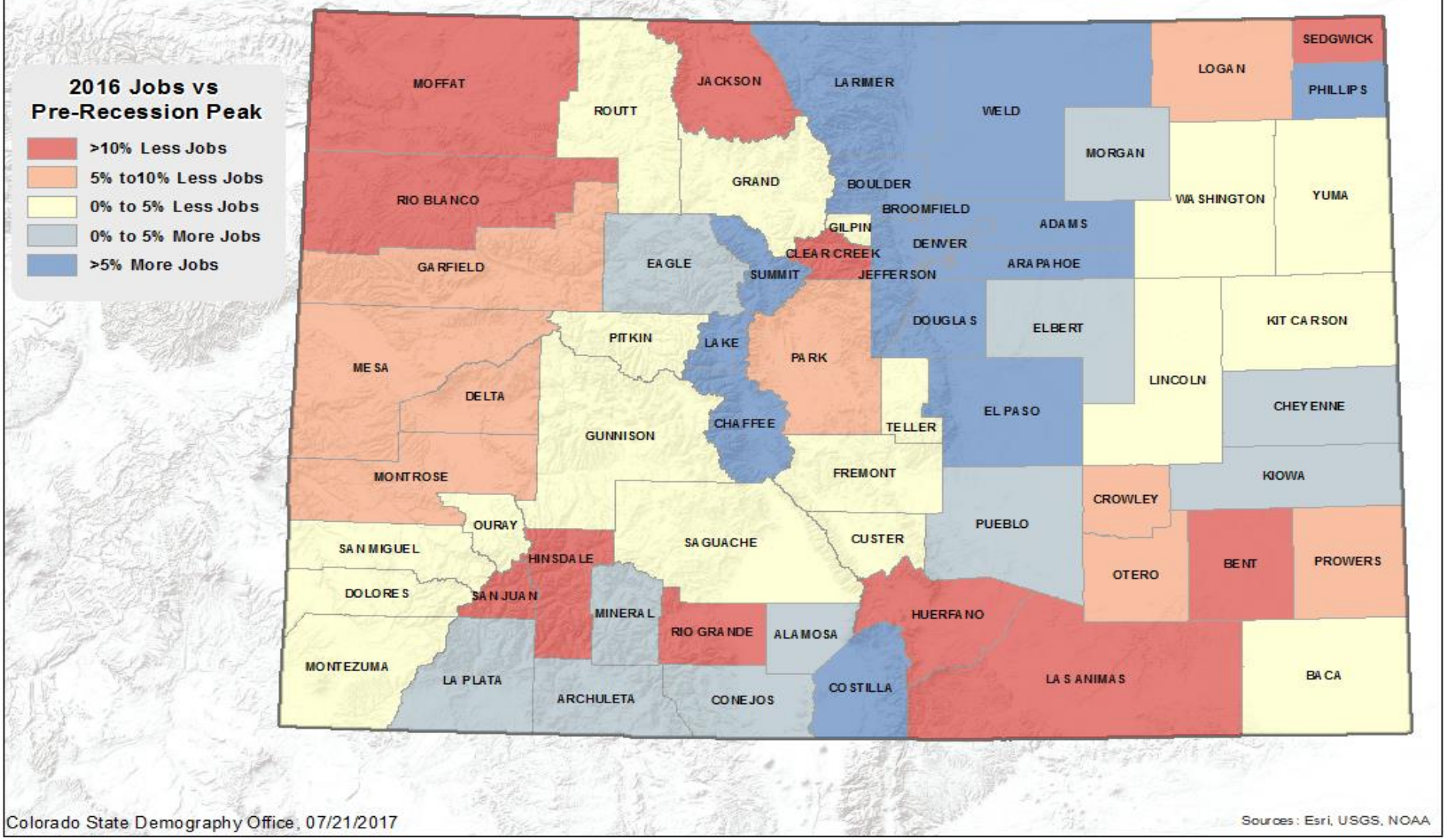


New Jobs and Net Migration



2016 Jobs Relative to Pre-Recession Peak

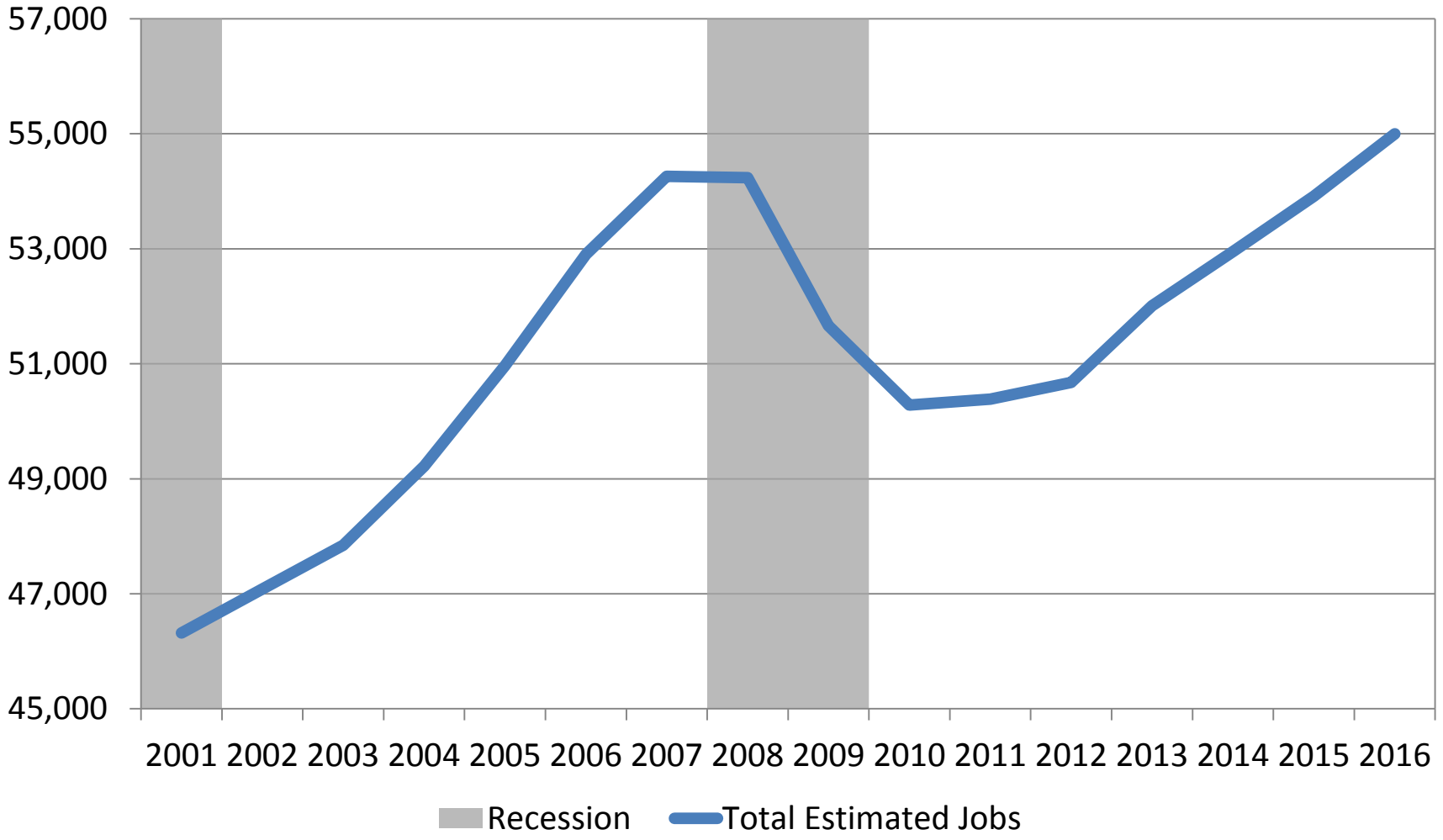
Recession Years: 2007-2009



Colorado State Demography Office, 07/21/2017

Sources: Esri, USGS, NOAA

Region 9 Total Jobs 2001-16



Region 9 Jobs by Industry

2016 Share of Jobs by Industry

Sector Name	Region 9	Colorado
Agriculture	0.4%	1.4%
Mining	2.0%	0.8%
Utilities	0.6%	0.3%
Construction	8.1%	6.6%
Manufacturing	3.2%	4.6%
Wholesale Trade	2.0%	3.5%
Retail Trade	13.7%	9.5%
Transportation & Warehousing	2.2%	3.0%
Information	1.3%	2.4%
Finance and Insurance	3.2%	4.0%
Real Estate and Rental and Leasing	1.9%	3.5%
Professional and Technical Services	3.4%	9.2%
Management of Companies	0.3%	1.1%
Administrative and Waste Services	3.1%	6.0%
Educational Services	0.8%	2.0%
Health Care and Social Assistance	13.1%	10.1%
Arts, Entertainment, and Recreation	2.6%	2.5%
Accommodation and Food Services	13.0%	8.6%
Other Services	2.4%	5.8%
Government	22.8%	15.1%

Source: SDO Total Estimated Jobs

Region 9 Job Change from 2010

Industry Share of Total Employment Growth from 2010 to 2016

Sector Name	Region 9	Colorado
Agriculture	4.6%	7.8%
Mining	-2.4%	-1.5%
Utilities	0.8%	0.9%
Construction	34.8%	20.5%
Manufacturing	31.9%	12.2%
Wholesale Trade	7.9%	12.8%
Retail Trade	12.8%	11.6%
Transportation & Warehousing	13.9%	22.9%
Information	-13.8%	0.5%
Finance and Insurance	9.9%	8.8%
Real Estate and Rental and Leasing	8.2%	11.7%
Professional and Technical Services	1.3%	18.2%
Management of Companies	78.8%	21.6%
Administrative and Waste Services	1.8%	14.4%
Educational Services	71.8%	21.1%
Health Care and Social Assistance	21.5%	17.7%
Arts, Entertainment, and Recreatio	30.0%	16.4%
Accommodation and Food Services	15.2%	19.2%
Other Services	6.4%	12.0%
Government	-3.6%	6.6%

Source: SDO Total Estimated Jobs

Employment by County

2016 Employment and Change Since 2010

Industry	Archuleta	Change	Dolores	Change	La Plata	Change	Montezuma	Change	San Juan	Change
Agriculture	346	69	189	21	958	97	840	59	-	-
Mining	40	- 17	30	21	704	- 84	242	85	-	- 2
Utilities	30	- 3	-	-	146	19	89	- 11	-	-
Construction	703	- 25	36	- 12	3,654	858	643	- 225	20	13
Manufacturing	171	89	27	8	846	237	403	- 18	2	- 1
Wholesale trade	37	- 21	8	- 5	671	80	237	- 1	8	5
Retail Trade	910	194	70	2	3,655	195	1,576	215	45	4
Trans and warehousing	48	16	19	8	773	47	259	14	-	-
Information	67	- 12	3	2	484	- 17	61	- 40	-	- 1
Finance activities	125	3	5	- 0	1,145	90	225	- 16	3	- 1
Real estate	445	54	14	- 2	1,322	100	333	- 22	20	12
Prof bus. services	352	- 3	24	0	2,122	178	473	- 75	32	16
Mgmt of companies	15	10	-	-	61	14	38	29	-	-
Admin and waste	244	30	19	5	1,470	15	331	45	3	2
Education	74	28	6	6	527	132	207	154	5	- 10
Health Services	447	172	5	- 5	3,954	641	1,626	128	14	2
Arts	151	23	4	4	1,346	317	131	- 10	43	4
Accom. and food	783	75	67	26	3,387	416	1,103	187	105	13
Other services	607	49	52	- 2	1,739	72	815	120	23	4
Government	852	117	244	36	5,910	- 67	2,824	- 264	77	2
Total	**6,450**	**850**	**821**	**112**	**34,873**	**3,339**	**12,456**	**354**	**399**	**62**

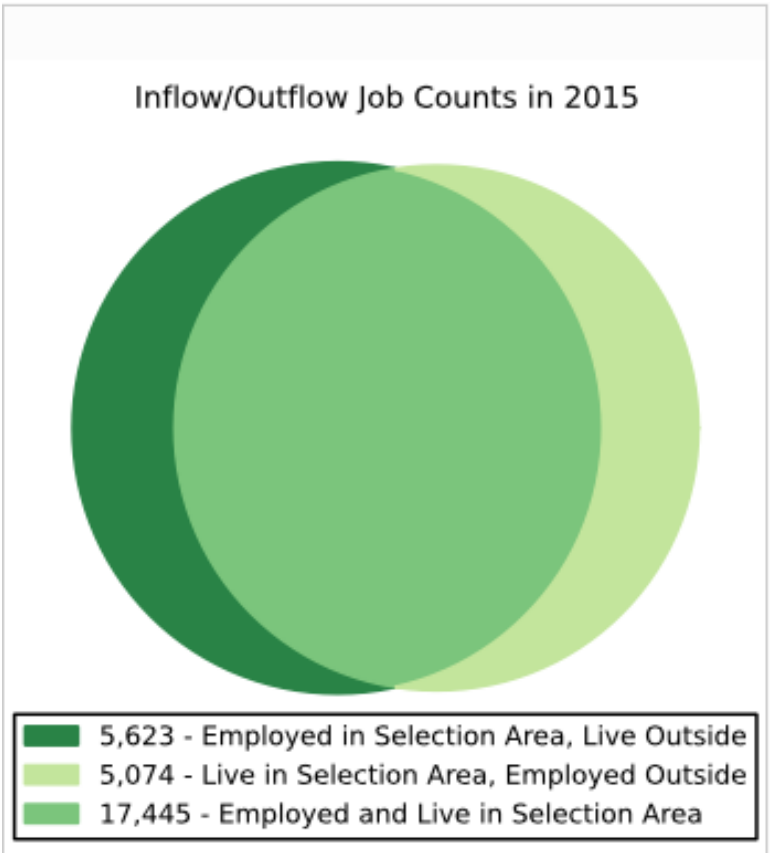
La Plata Commuting

Inflow/Outflow Job Counts (Primary Jobs)

	2015 Count	2015 Share
Employed in the Selection Area	23,068	100.0%
Employed in the Selection Area but Living Outside	5,623	24.4%
Employed and Living in the Selection Area	17,445	75.6%
Living in the Selection Area	22,519	100.0%
Living in the Selection Area but Employed Outside	5,074	22.5%
Living and Employed in the Selection Area	17,445	77.5%

Jobs Counts by Counties Where Workers Live - Primary Jobs

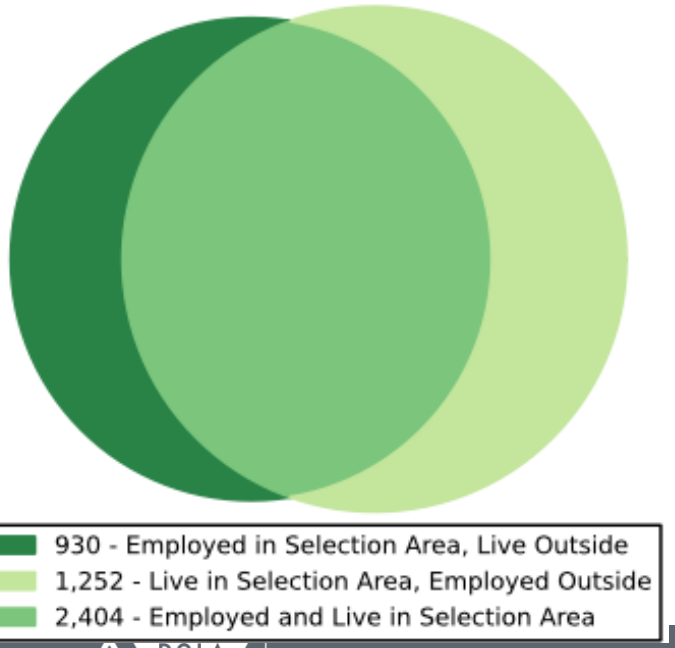
	2015 Count	2015 Share
All Counties	23,068	100.0%
La Plata County, CO	17,445	75.6%
San Juan County, NM	1,174	5.1%
Montezuma County, CO	821	3.6%
Archuleta County, CO	354	1.5%
Montrose County, CO	251	1.1%
El Paso County, CO	192	0.8%
Larimer County, CO	188	0.8%
Mesa County, CO	162	0.7%
Weld County, CO	145	0.6%
Denver County, CO	142	0.6%
All Other Locations	2,194	9.5%



Commuting Archuleta

Inflow/Outflow Job Counts (Primary Jobs)

	2015 Count	2015 Share
Employed in the Selection Area	3,334	100.0%
Employed in the Selection Area but Living Outside	930	27.9%
Employed and Living in the Selection Area	2,404	72.1%
Living in the Selection Area	3,656	100.0%
Living in the Selection Area but Employed Outside	1,252	34.2%
Living and Employed in the Selection Area	2,404	65.8%



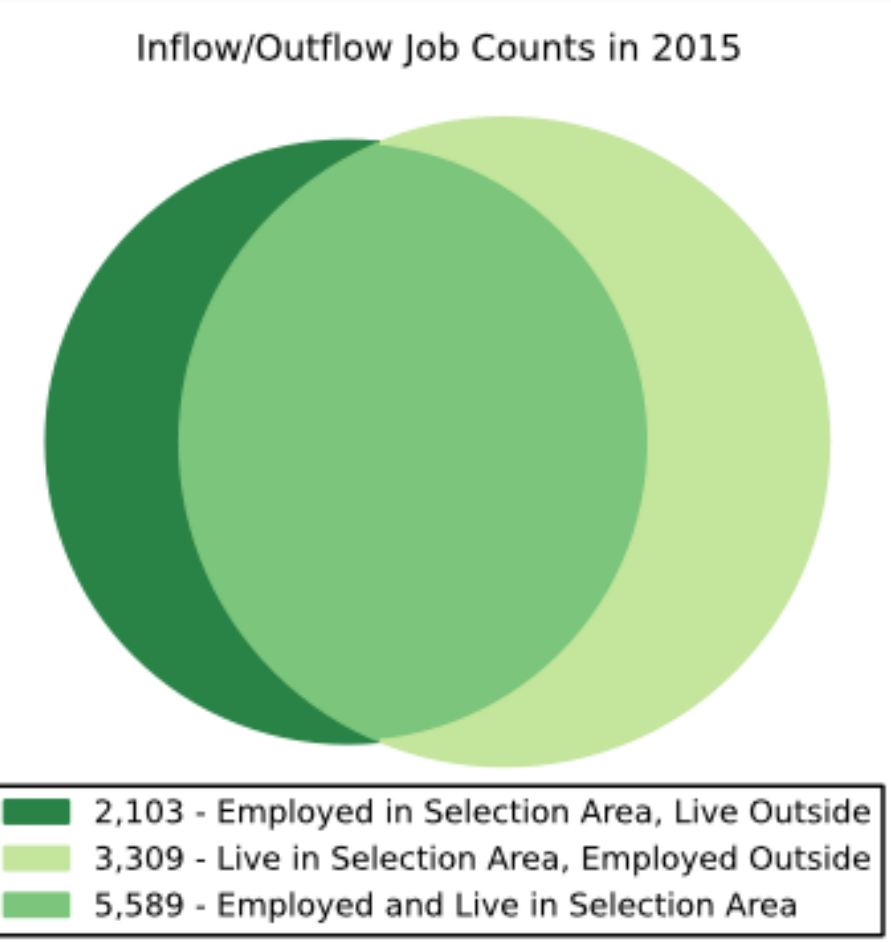
Jobs Counts by Counties Where Workers Live - Primary Jobs

	2015 Count	2015 Share
All Counties	3,334	100.0%
Archuleta County, CO	2,404	72.1%
La Plata County, CO	254	7.6%
Montezuma County, CO	58	1.7%
Alamosa County, CO	56	1.7%
El Paso County, CO	54	1.6%
San Juan County, NM	43	1.3%
Montrose County, CO	28	0.8%
Rio Grande County, CO	25	0.7%
Mesa County, CO	24	0.7%
Denver County, CO	22	0.7%
All Other Locations	366	11.0%

Jobs Counts by Counties Where Workers are Employed - Primary Jobs

	2015 Count	2015 Share
All Counties	3,656	100.0%
Archuleta County, CO	2,404	65.8%
La Plata County, CO	354	9.7%
San Juan County, NM	96	2.6%
Denver County, CO	67	1.8%
Montezuma County, CO	65	1.8%
Rio Arriba County, NM	60	1.6%
Mesa County, CO	55	1.5%
El Paso County, CO	48	1.3%
Jefferson County, CO	44	1.2%
Adams County, CO	39	1.1%
All Other Locations	424	11.6%

Commuting in Montezuma



Jobs Counts by Counties Where Workers are Employed - Primary Jobs

	2015 Count	2015 Share
All Counties	8,898	100.0%
Montezuma County, CO	5,589	62.8%
La Plata County, CO	821	9.2%
San Juan County, NM	437	4.9%
Mesa County, CO	265	3.0%
Dolores County, CO	134	1.5%
Denver County, CO	125	1.4%
Montrose County, CO	112	1.3%
San Juan County, UT	111	1.2%
Jefferson County, CO	108	1.2%
El Paso County, CO	102	1.1%
All Other Locations	1,094	12.3%

Inflow/Outflow Job Counts (Primary Jobs)

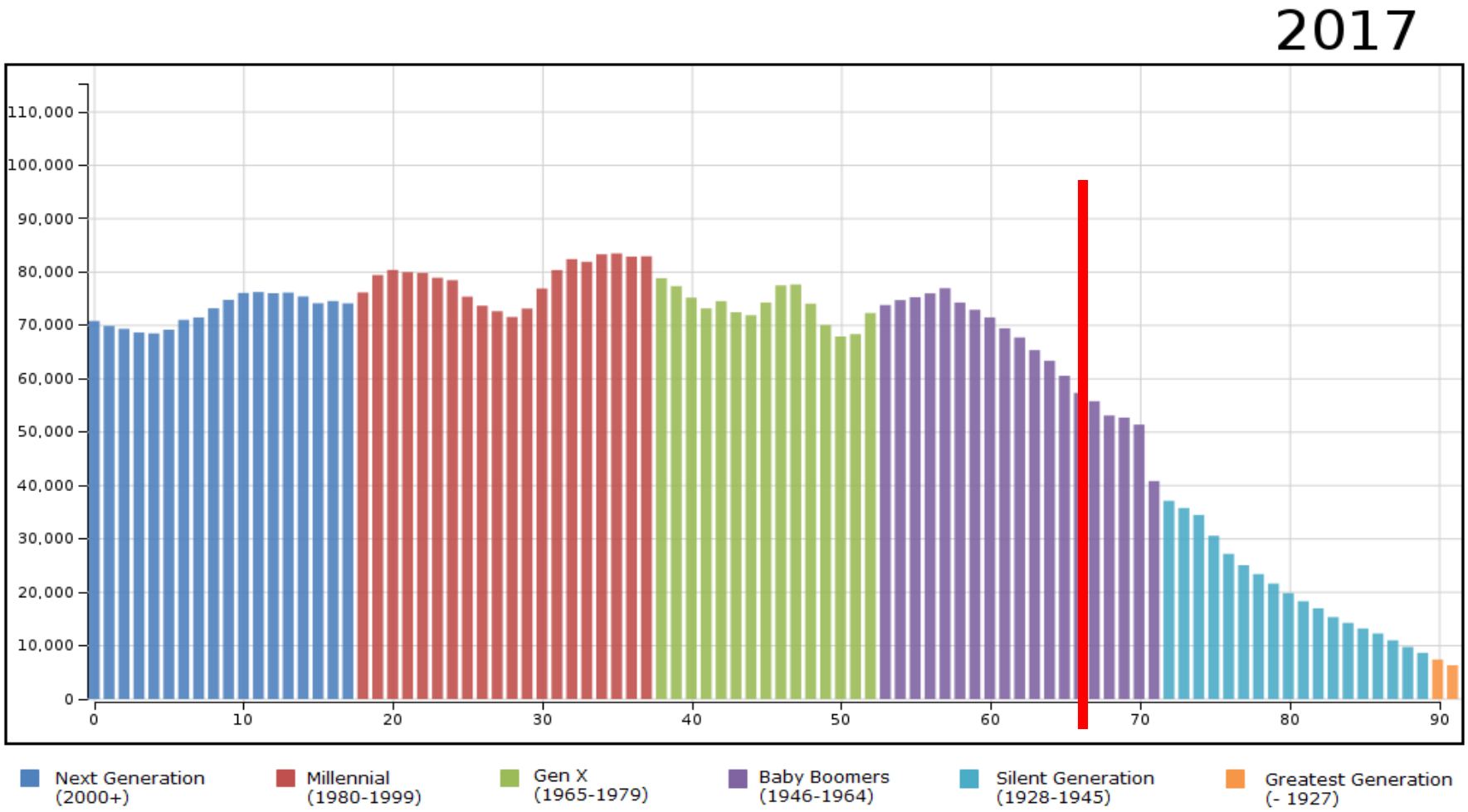
	2015 Count	2015 Share
Employed in the Selection Area	7,692	100.0%
Employed in the Selection Area but Living Outside	2,103	27.3%
Employed and Living in the Selection Area	5,589	72.7%
Living in the Selection Area	8,898	100.0%
Living in the Selection Area but Employed Outside	3,309	37.2%
Living and Employed in the Selection Area	5,589	62.8%

Do You Know Your Age?

Today? …. 10 years from now?

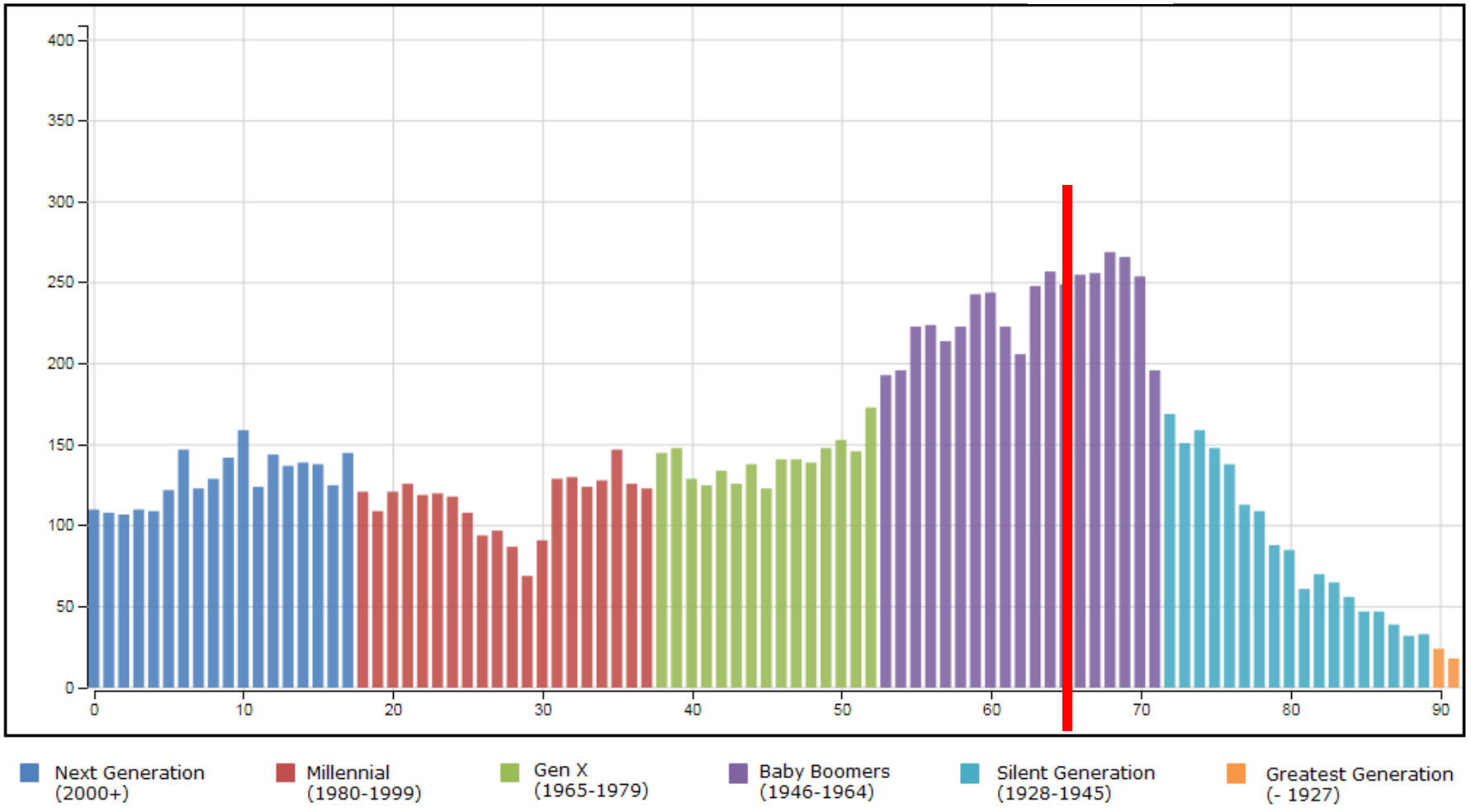
Colorado Population by Age

demography.dola.colorado.gov/gis/map-gallery



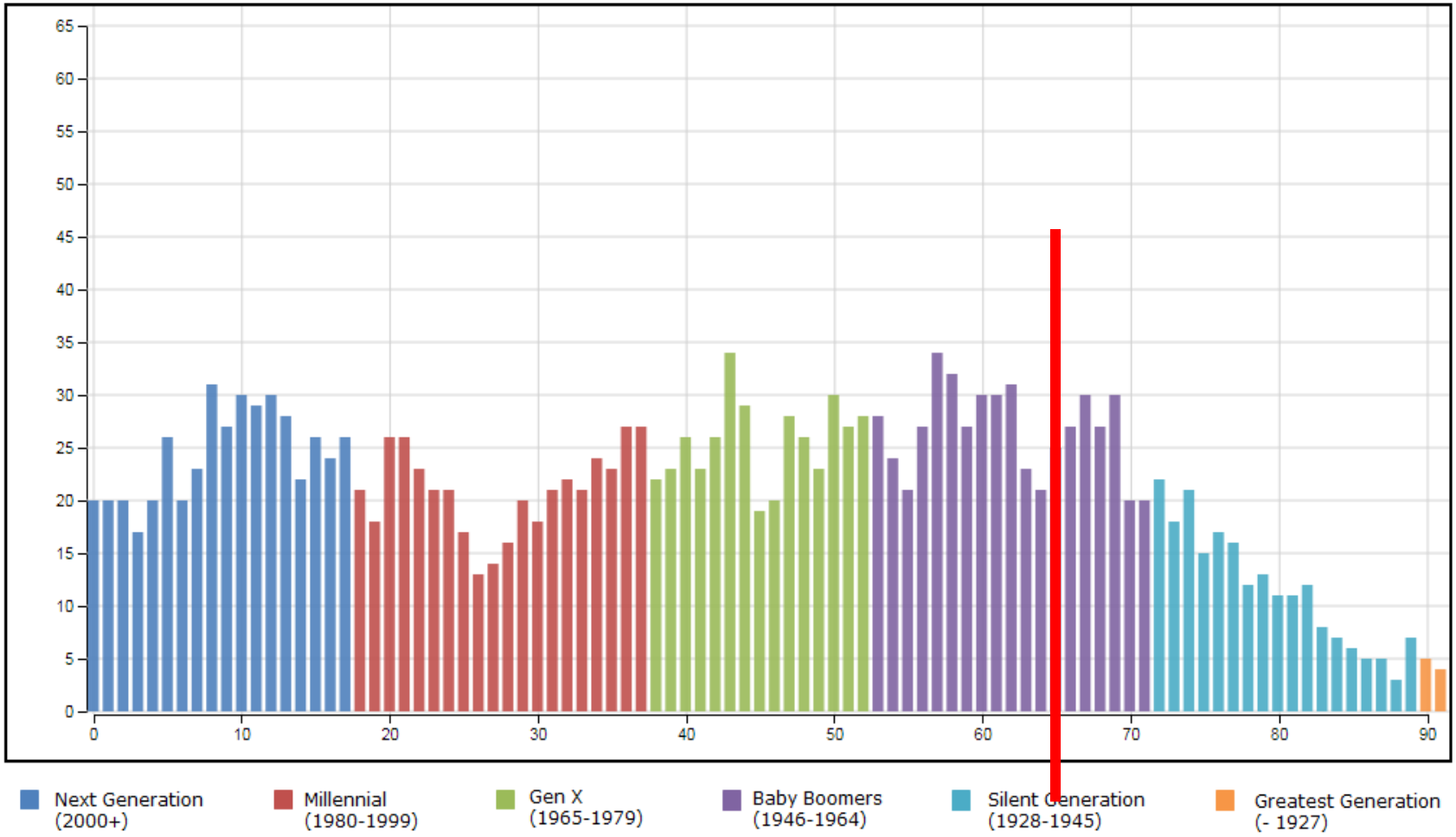
Archuleta County Population by Age

2017



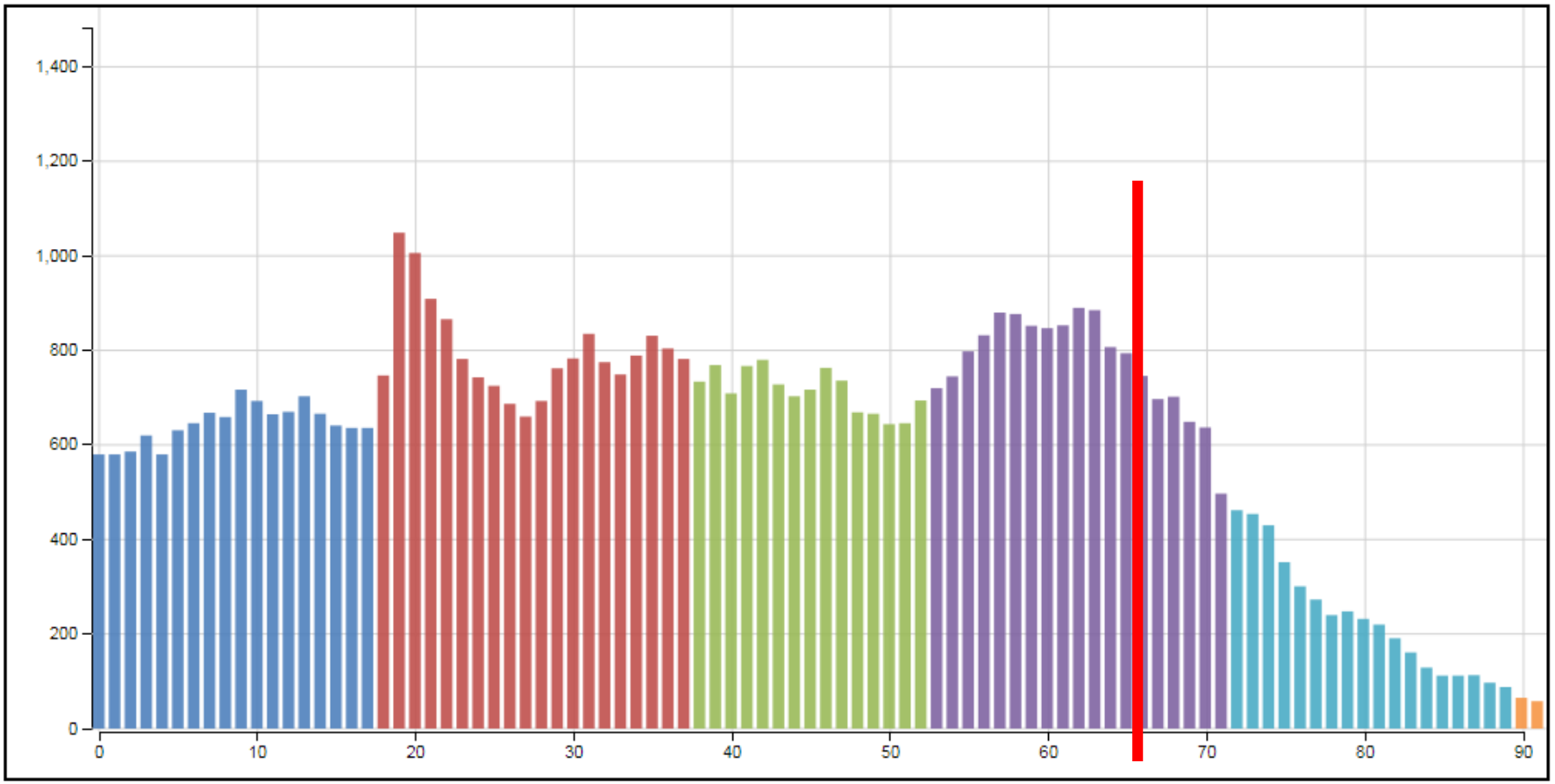
Dolores County Population by Age

2017

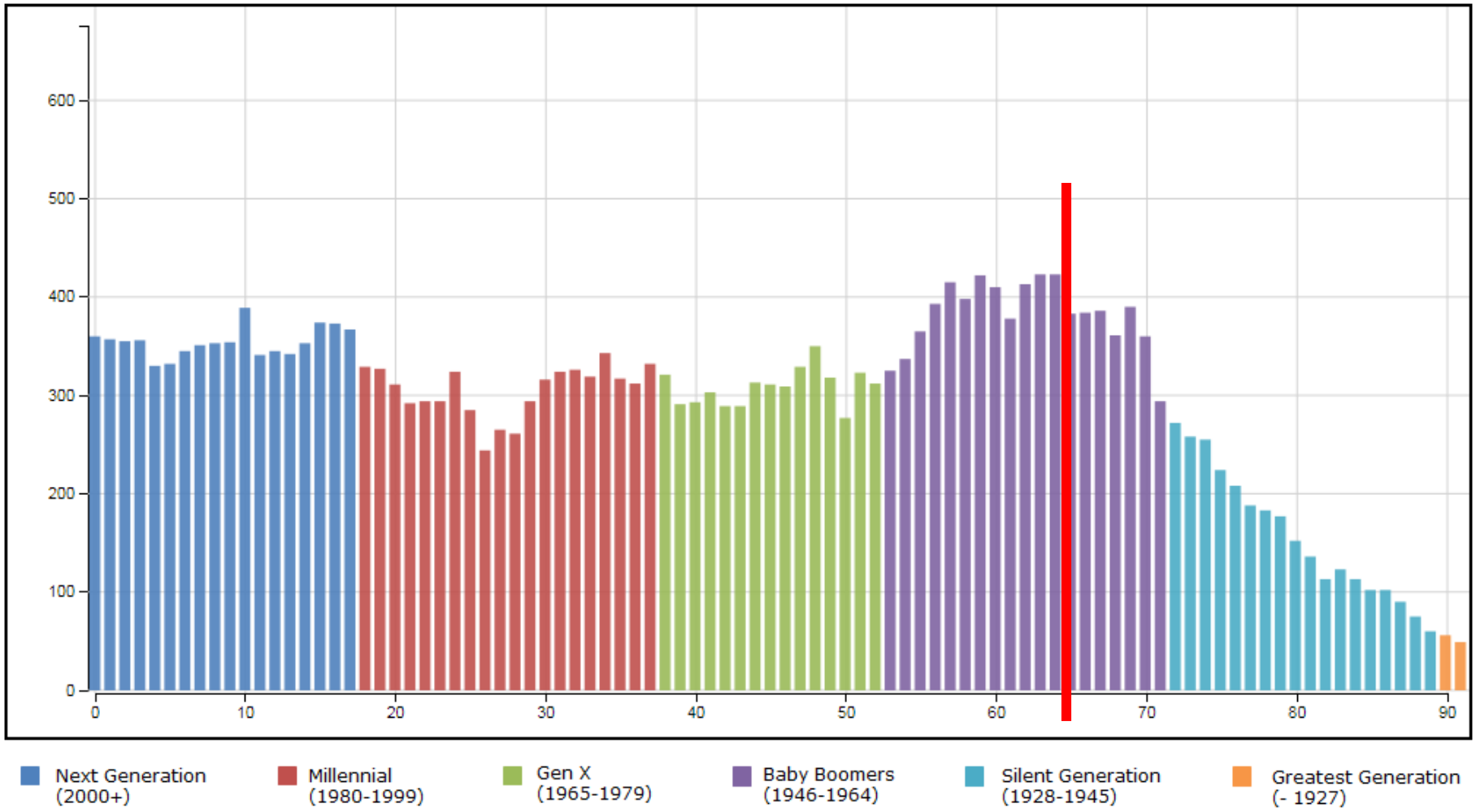


La Plata County Population by Age

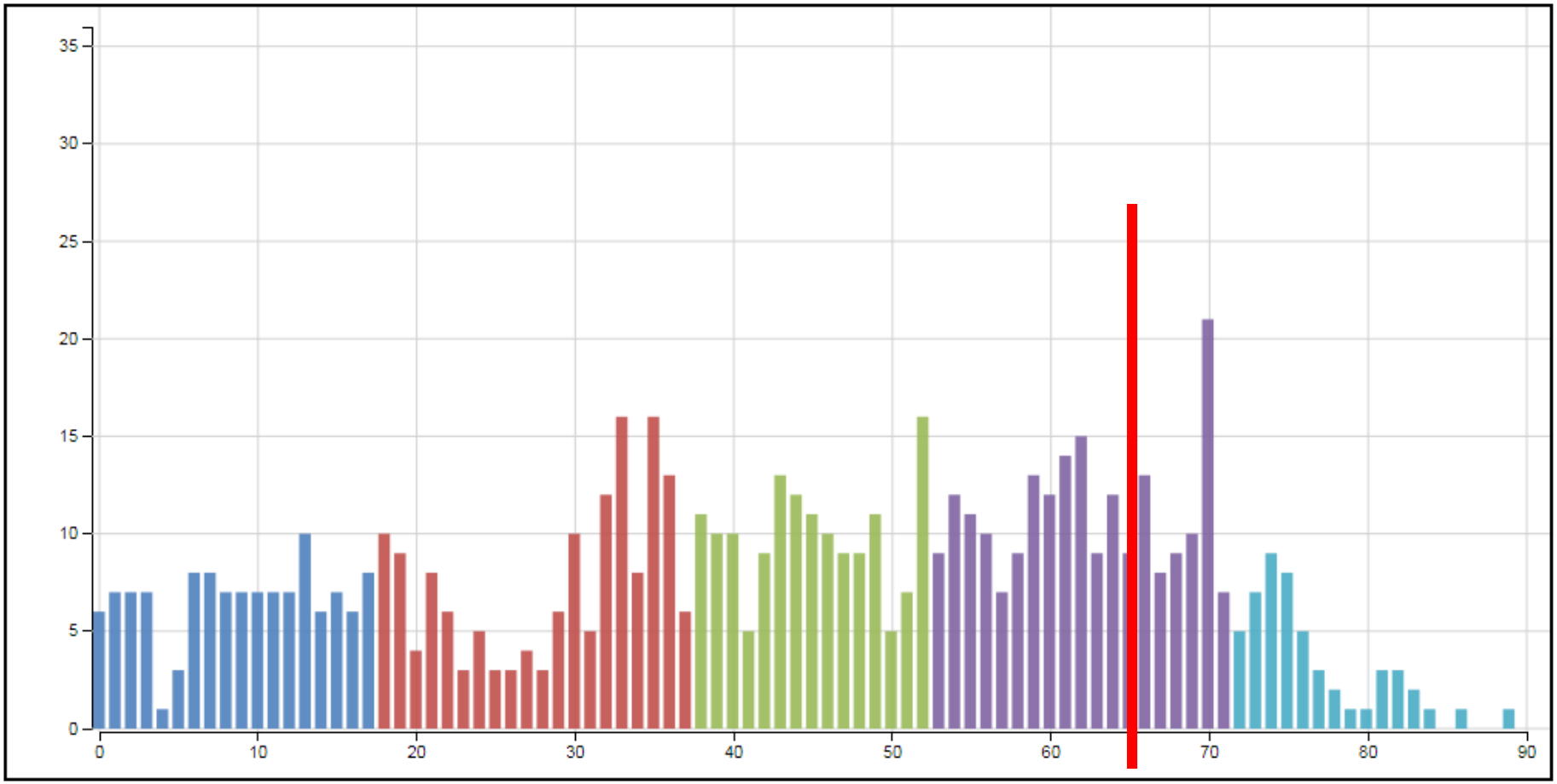
2017



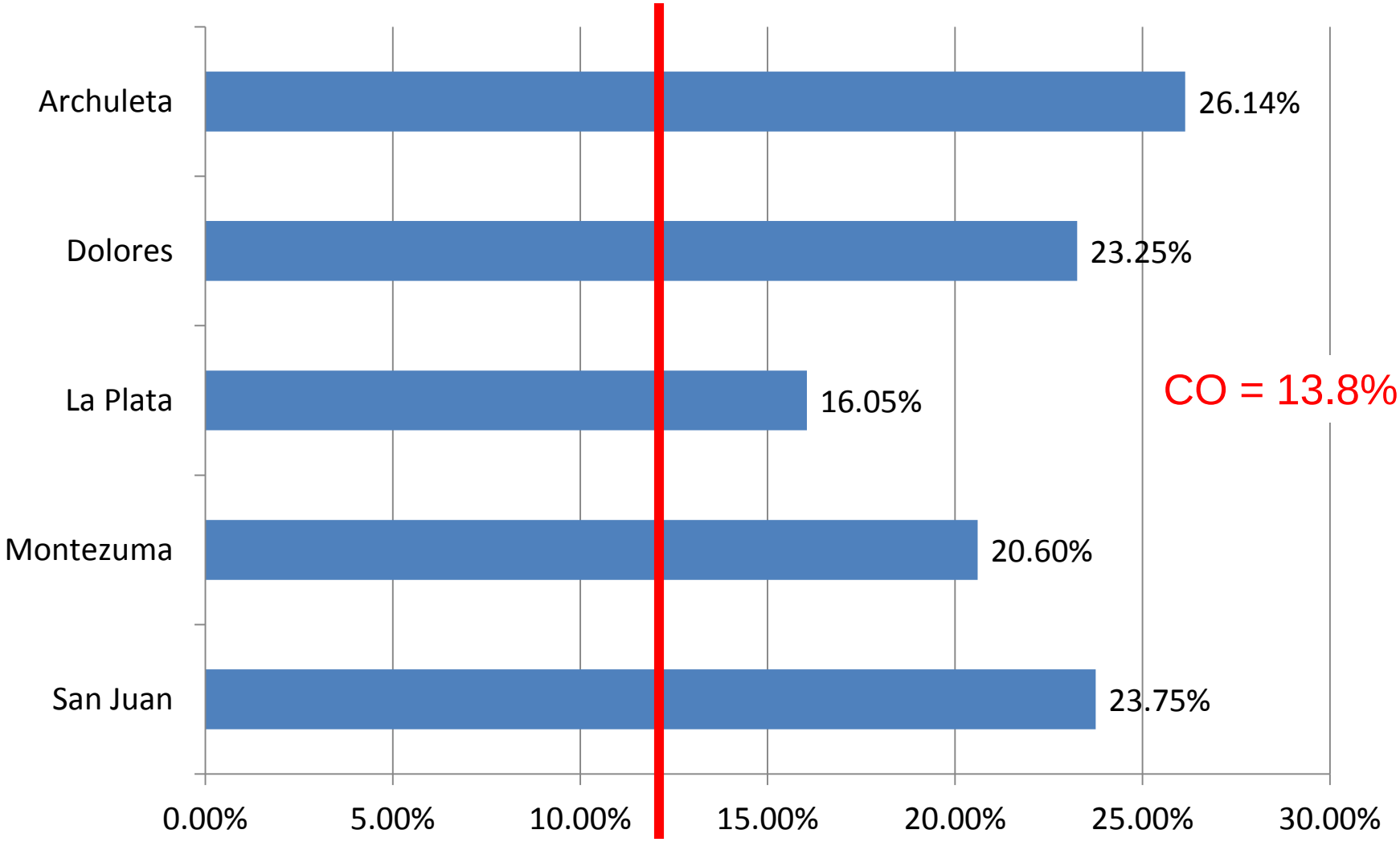
Montezuma County Population by Age



San Juan County Population by Age

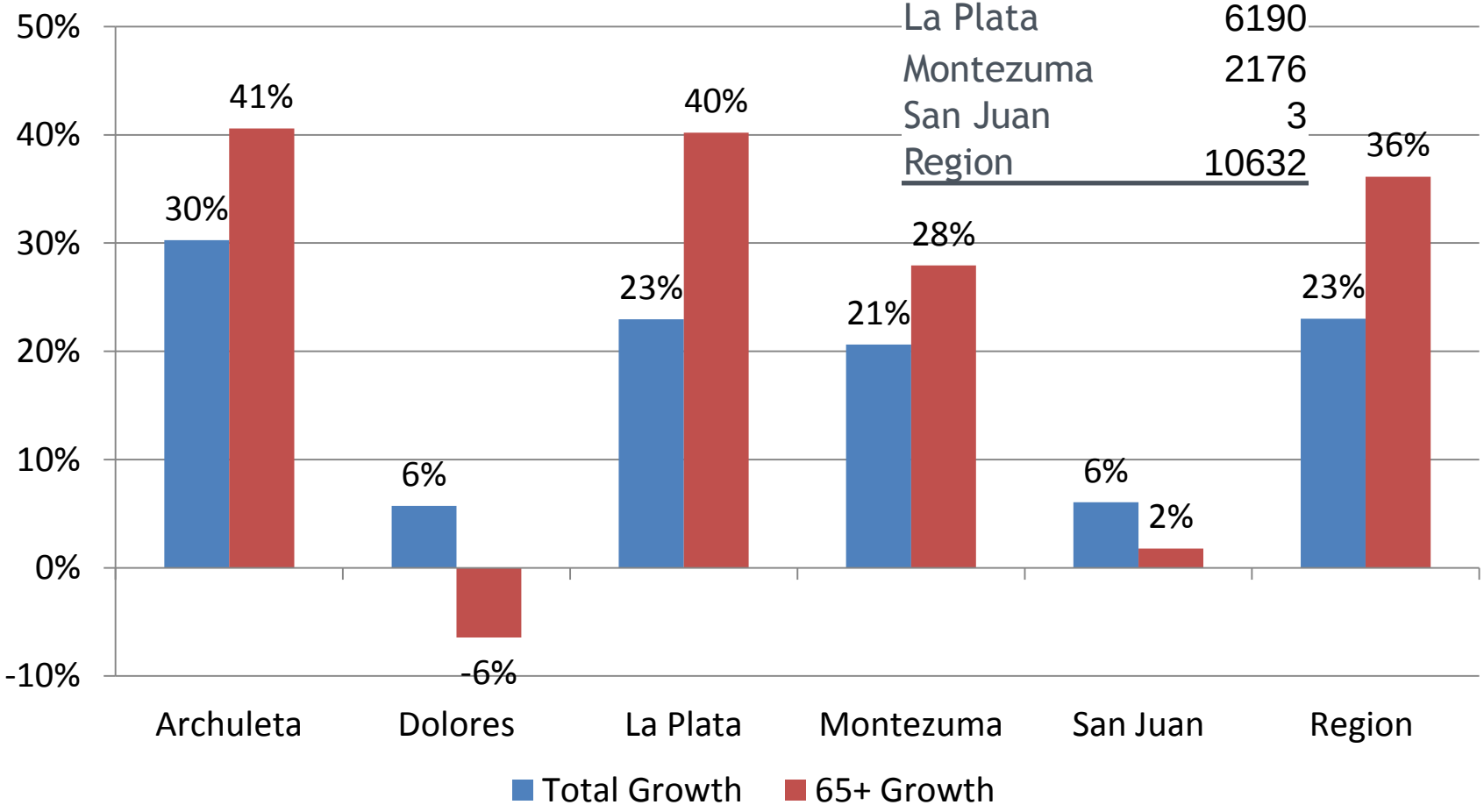


Share of Population 65+



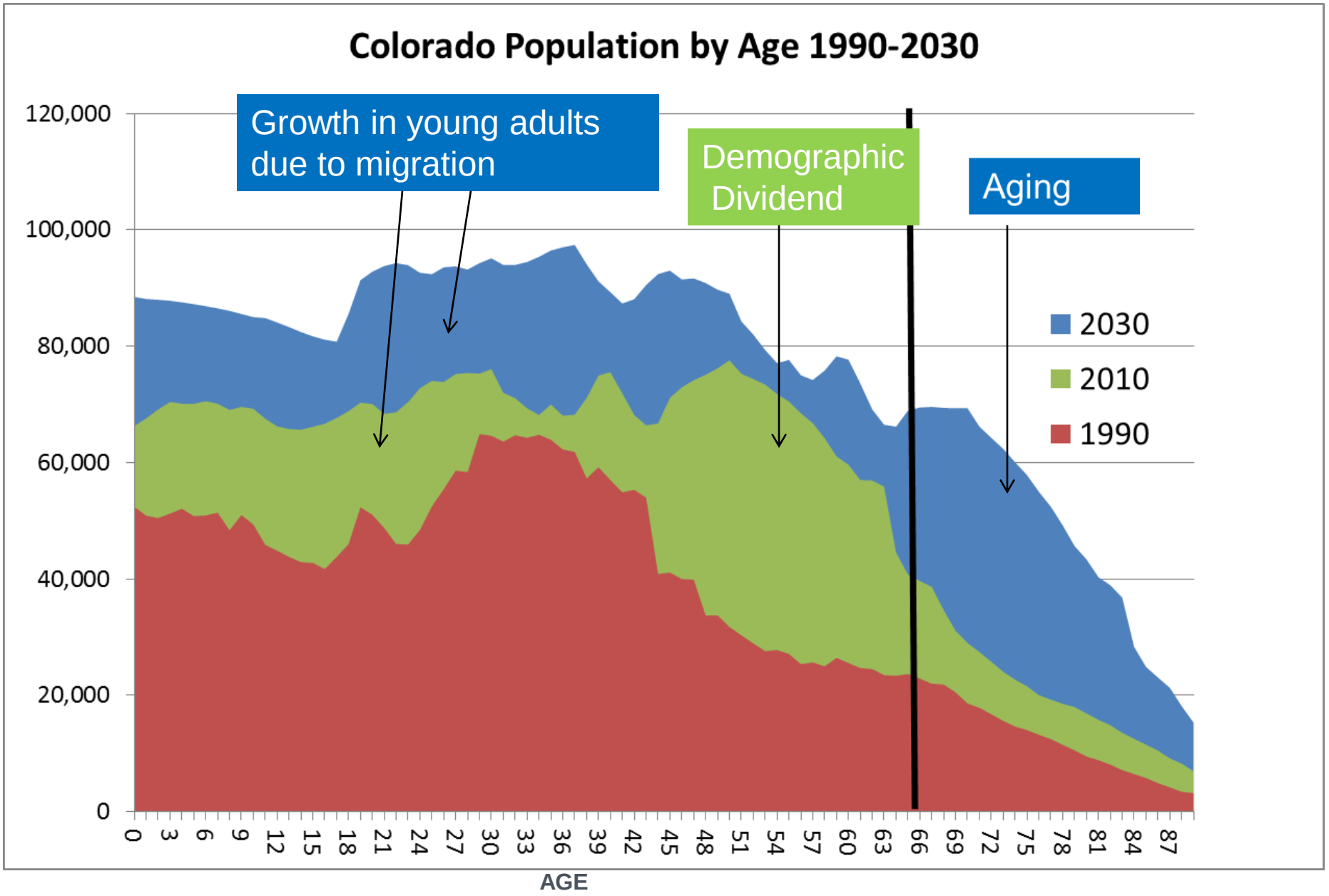
Total Population vs 65+ Growth 2017 - 2030

	Change in 65+
Archuleta	2291
Dolores	-28
La Plata	6190
Montezuma	2176
San Juan	3
Region	10632



Why Are We Getting Old Fast?

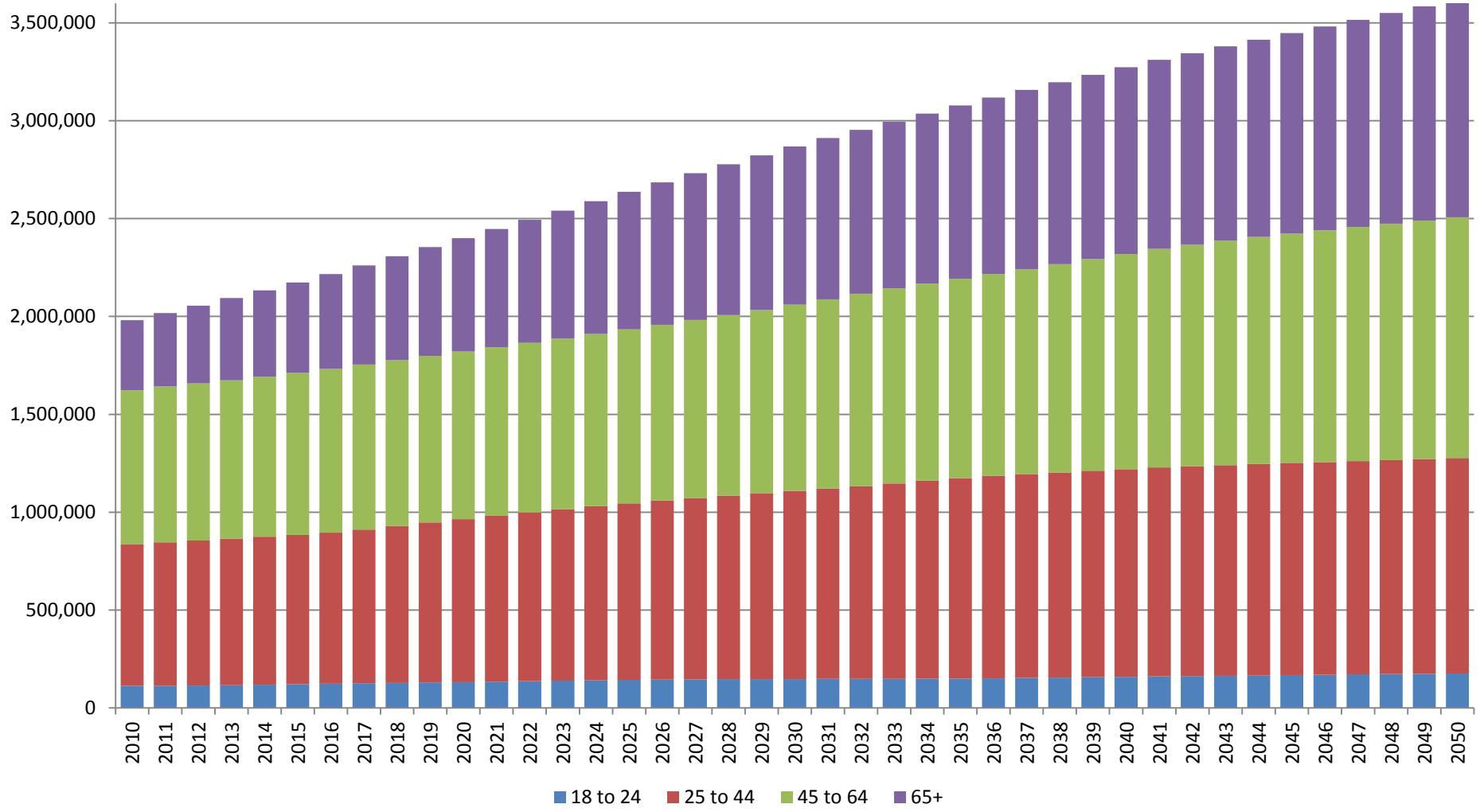
- Currently very few people over the age 65.
  - 3rd fastest growing
  - 6th lowest share of all states in US (13%)
- Baby Boomers
  - Born 1946 – 1964
  - 1,340,000 Boomers in Colorado (26% of pop. in 2010)
- By 2030, Colorado's population 65+ will be 125% larger than it was in 2010 growing from 555,000 to 1,243,000. (just from aging)
- Transition age distribution from "young" to more US average between 2010 and 2030.


Colorado Population by Age 1990-2030
Growth in young adults due to migration
Demographic Dividend
Aging
2030
2010
1990
120,000
100,000
80,000
60,000
40,000
20,000
0
0 3 6 9 12 15 18 21 24 27 30 33 36 39 42 45 48 51 54 57 60 63 66 69 72 75 78 81 84 87
AGE

Aging Issues

- Numbers
- Economic Driver - wealthier …. depends
  - Impact on occupational mix
- Labor Force
- Housing
- Income – Downward Pressure
- Health
- Disabilities
- Transportation
- Public Finance – Downward Pressure

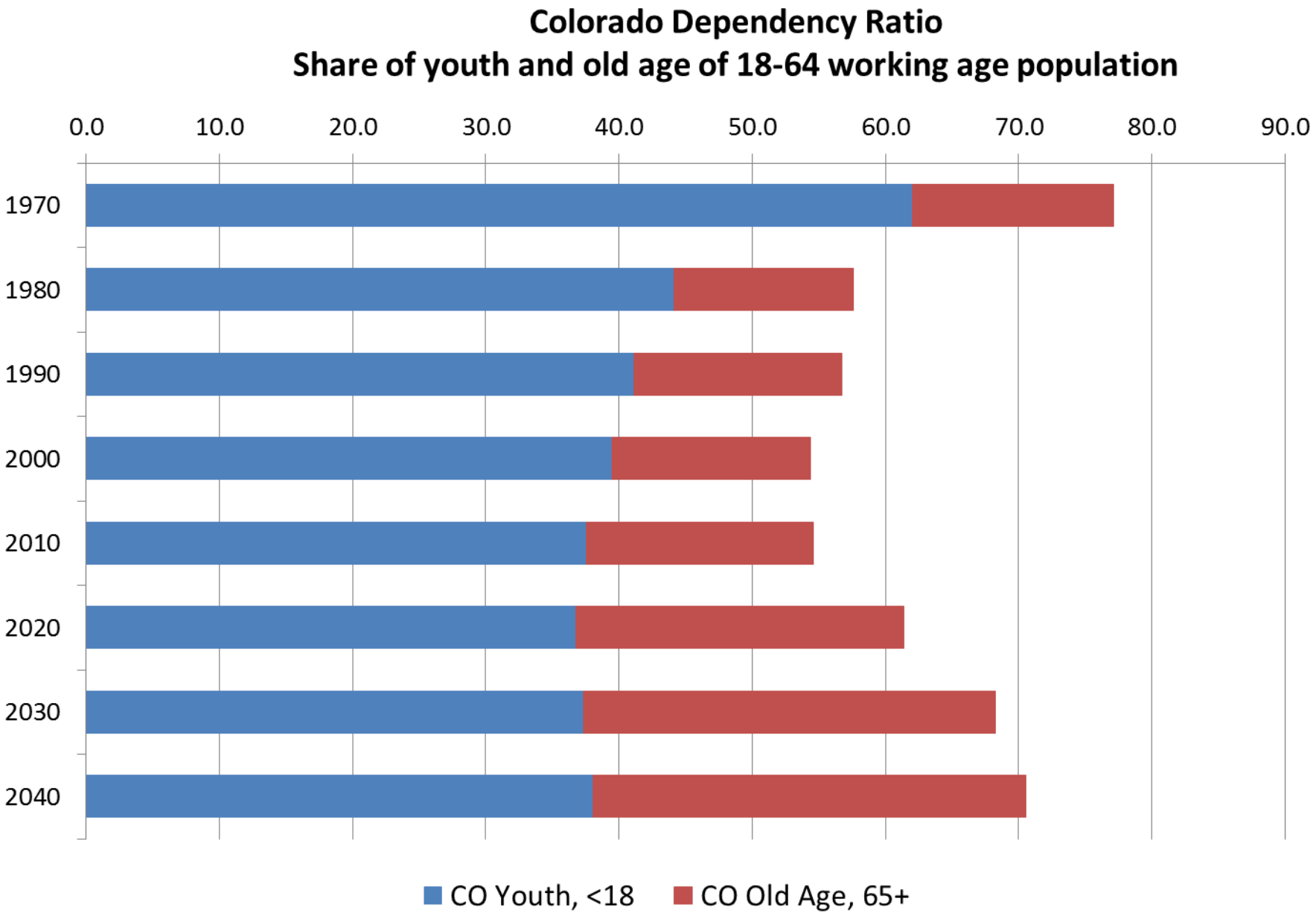
Households by Age 2010 to 2050



2010-2030

2030+

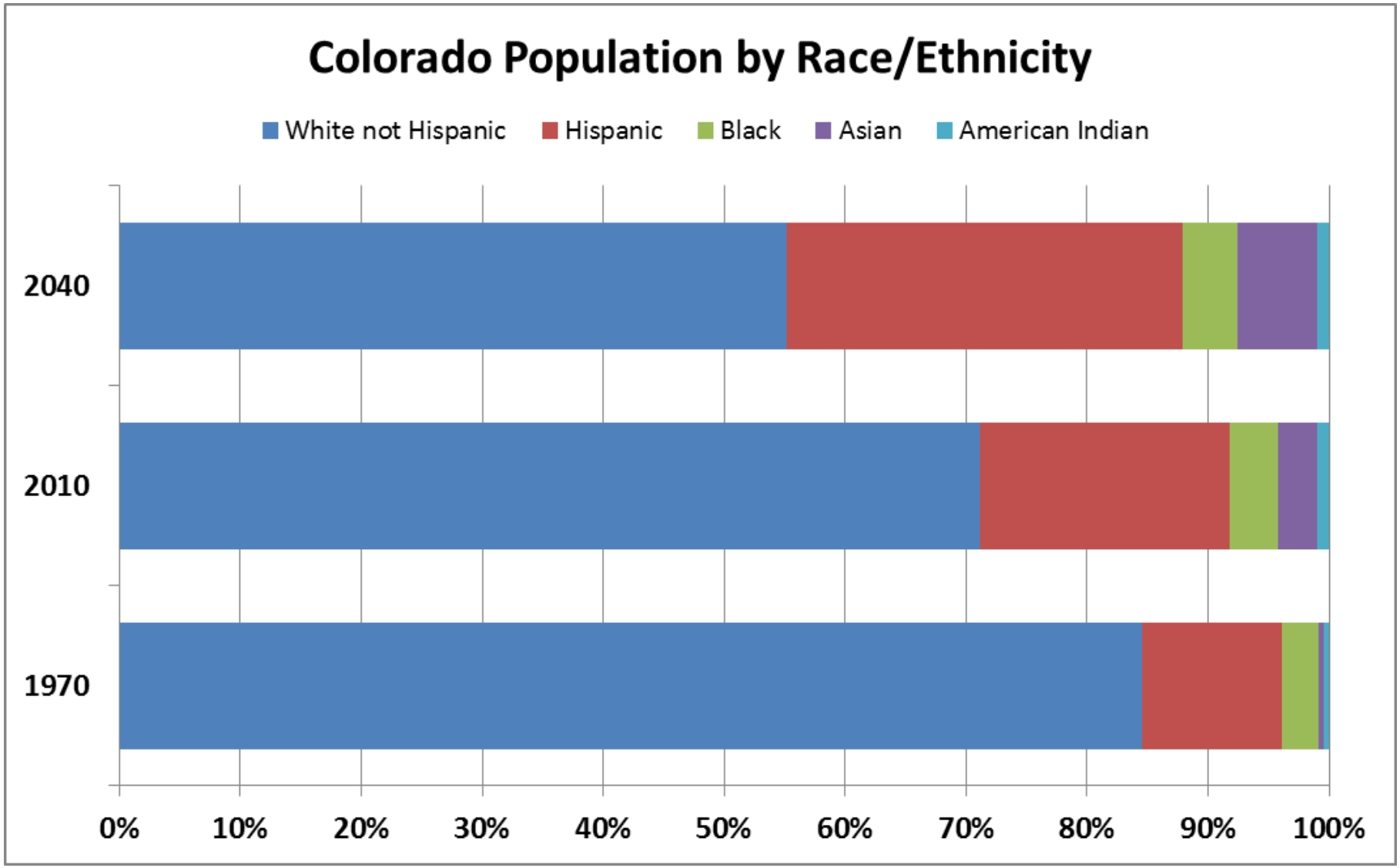
State Demography Office


Colorado Dependency Ratio
Share of youth and old age of 18-64 working age population
0.0
10.0
20.0
30.0
40.0
50.0
60.0
70.0
80.0
90.0
1970
1980
1990
2000
2010
2020
2030
2040
CO Youth, <18
CO Old Age, 65+

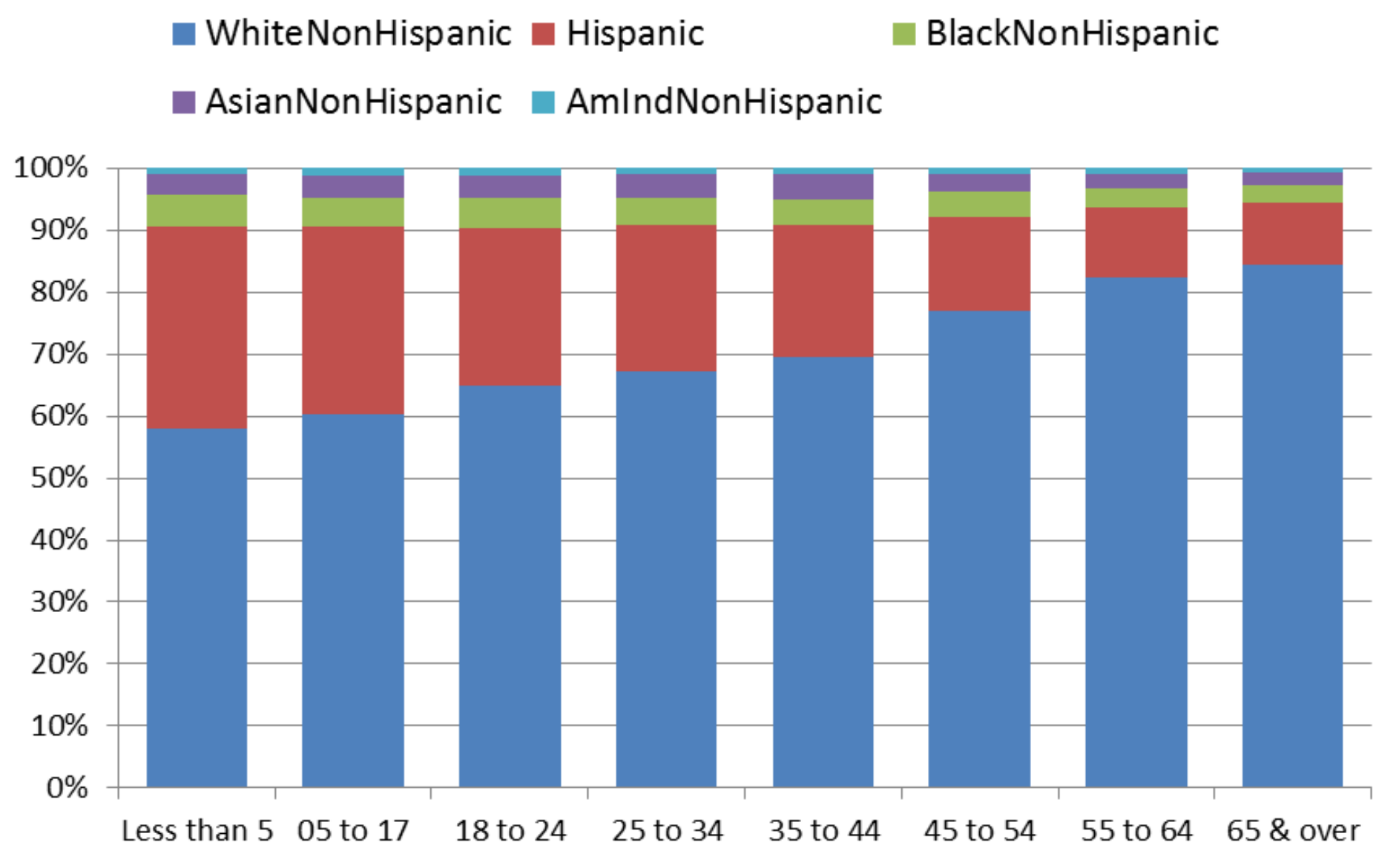
Implications for Public Finance / Planning

- Per Capita income growth will not be as rapid
- Per capita taxable expenditures will likely decline
- Property tax collections per capita dip due to “down-sizing” by elderly population and “Homestead Act” Tax Abatements
- Increasing demand for public services due to aging population
- Policy-makers must plan public finance priorities and expenditure/tax mix accordingly.

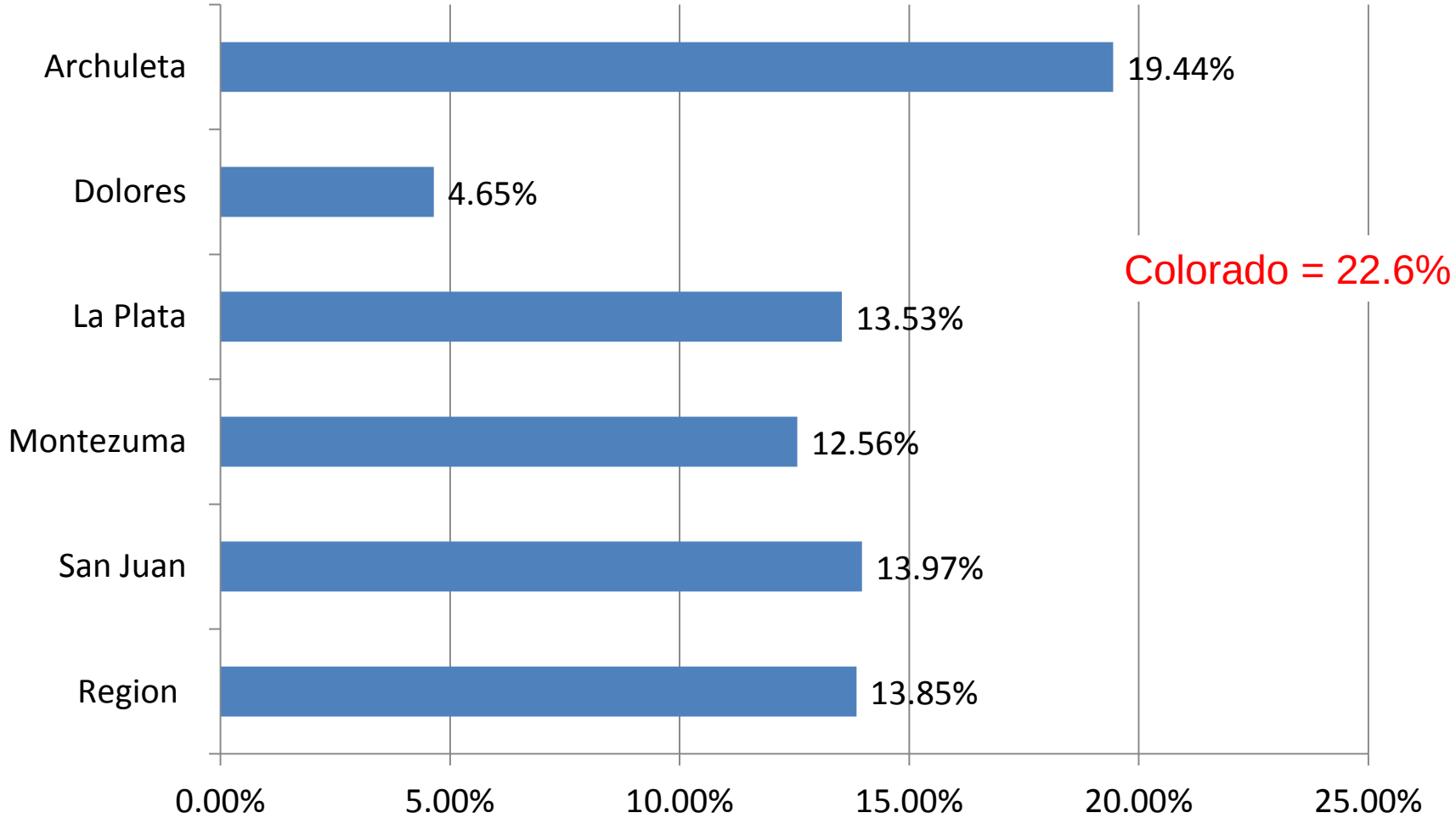
Race and Ethnicity Increasing


Colorado Population by Race/Ethnicity
White not Hispanic
Hispanic
Black
Asian
American Indian
2040
2010
1970
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%

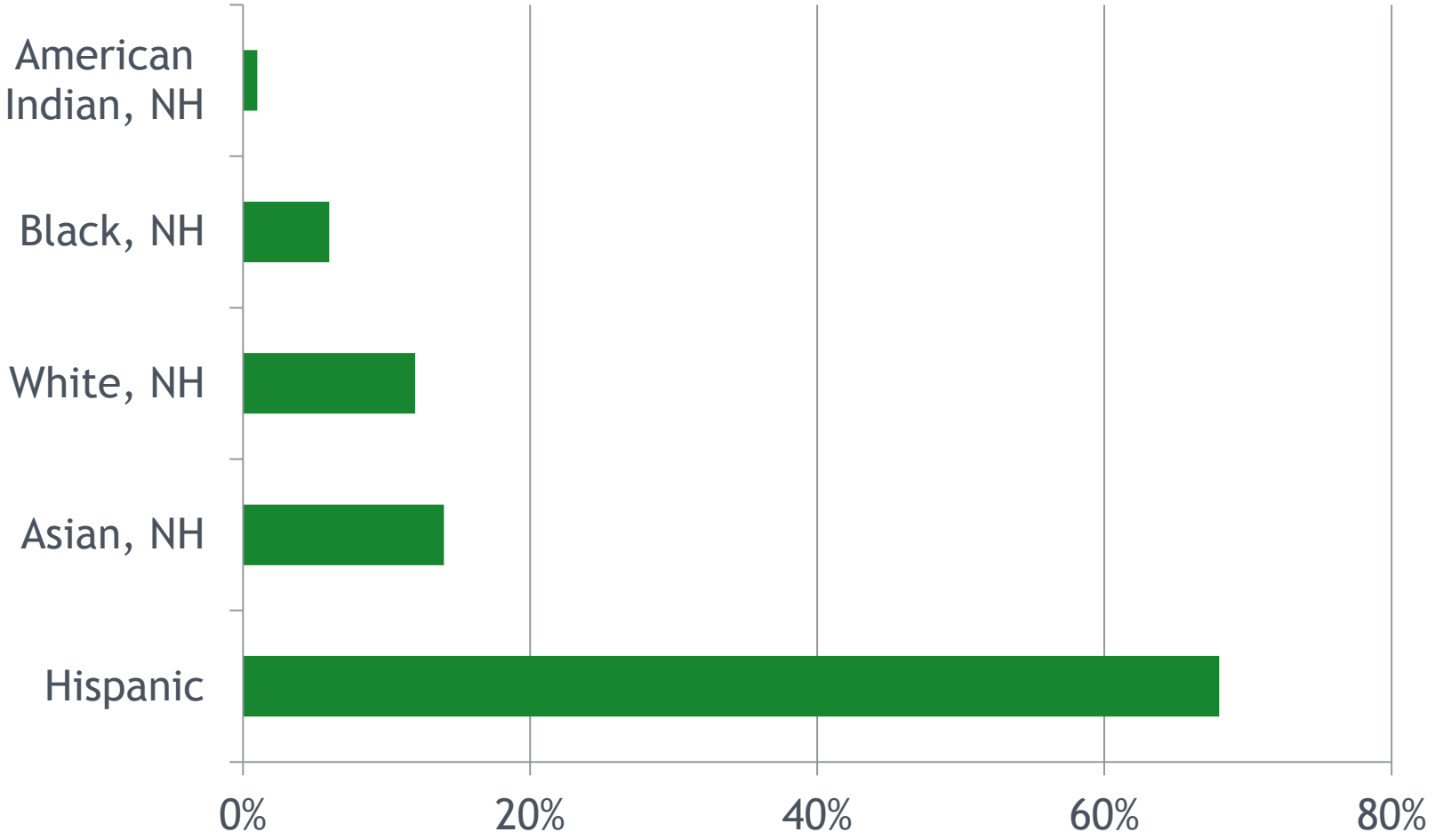
2010 Colorado Population by Race/Ethnicity and Age



Hispanic Share of Population in 2017

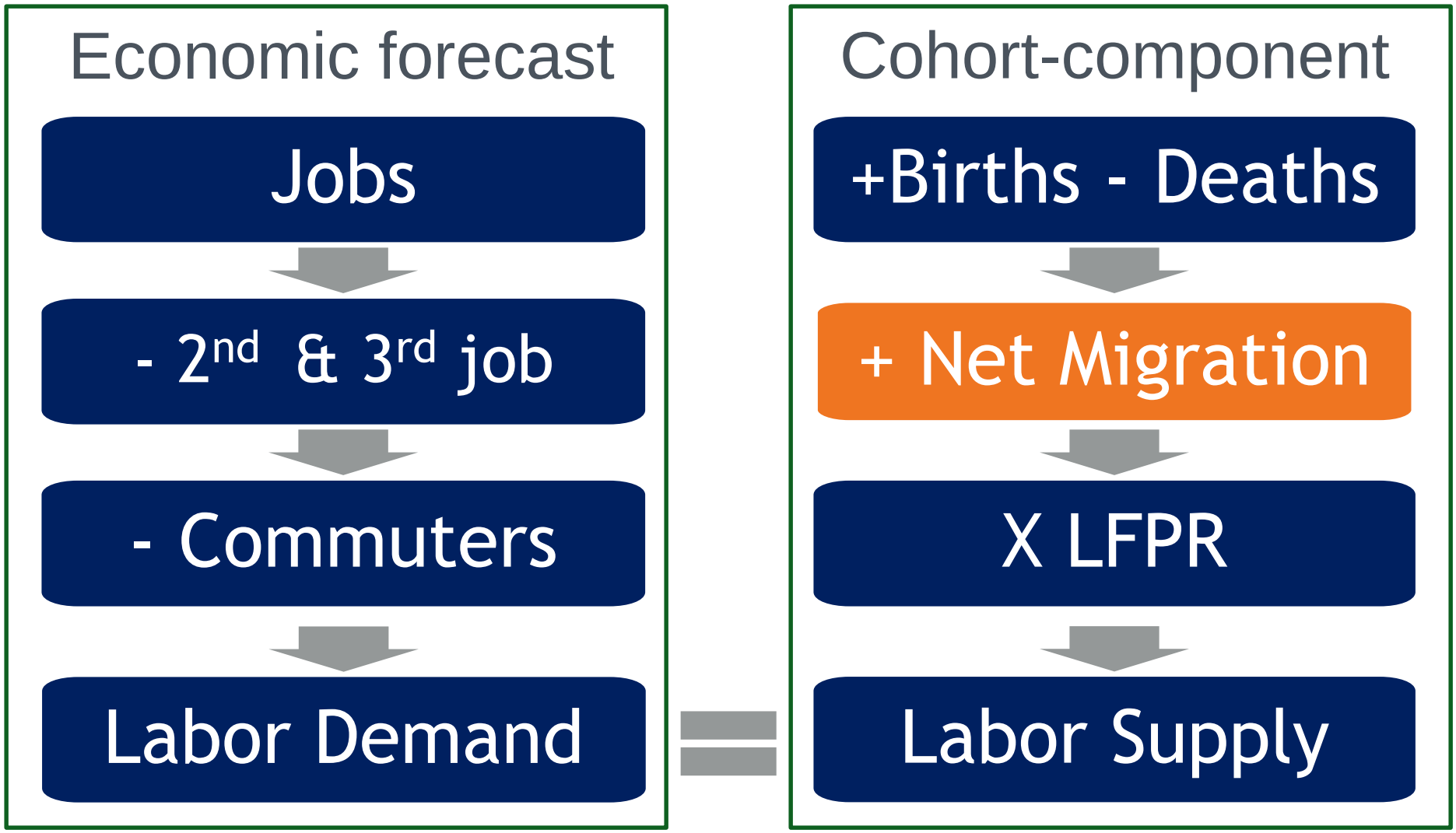


Share of Net Increase in Colorado Working Age Population, 2015-2020



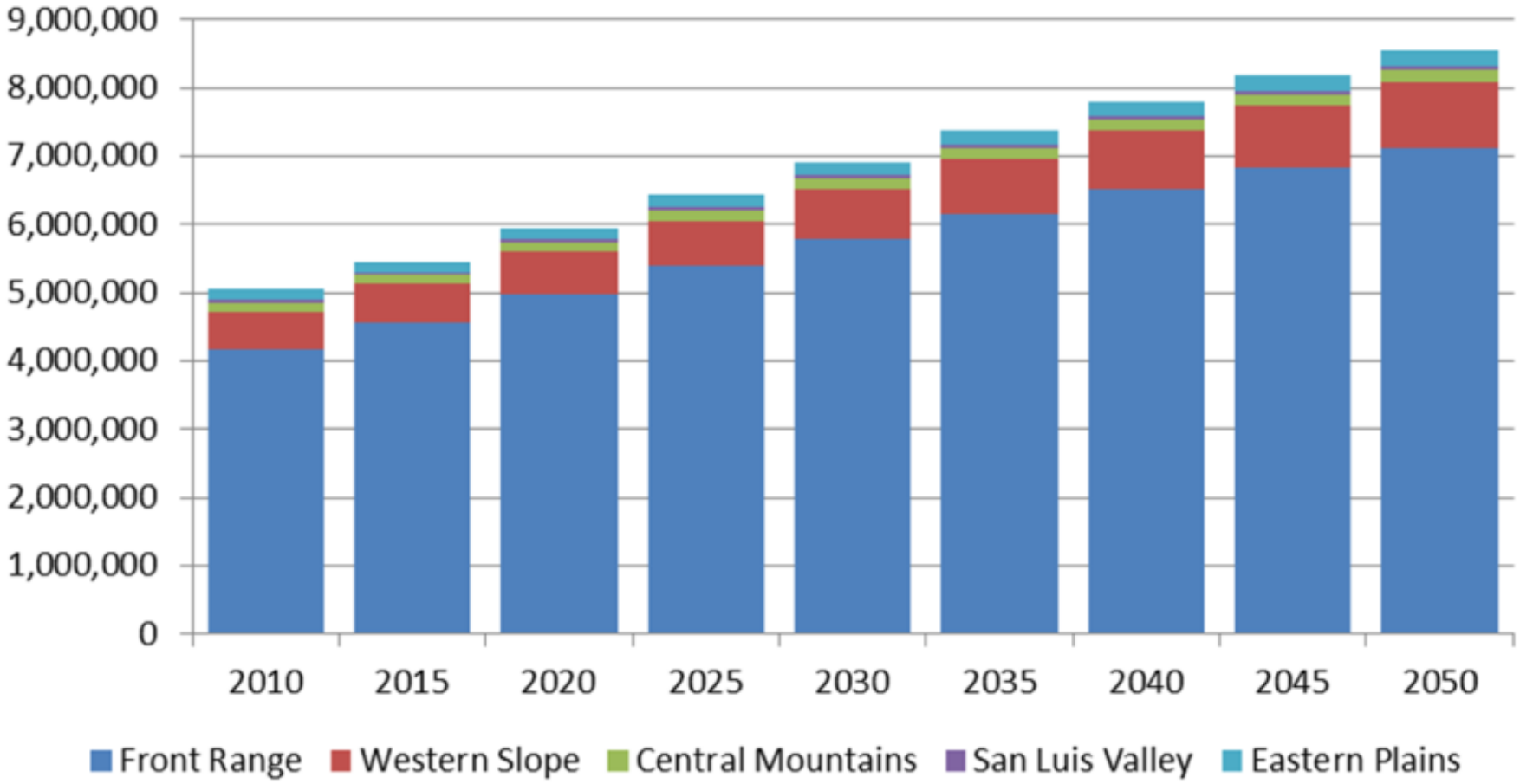
Growing and Slowing

Population forecast methodology

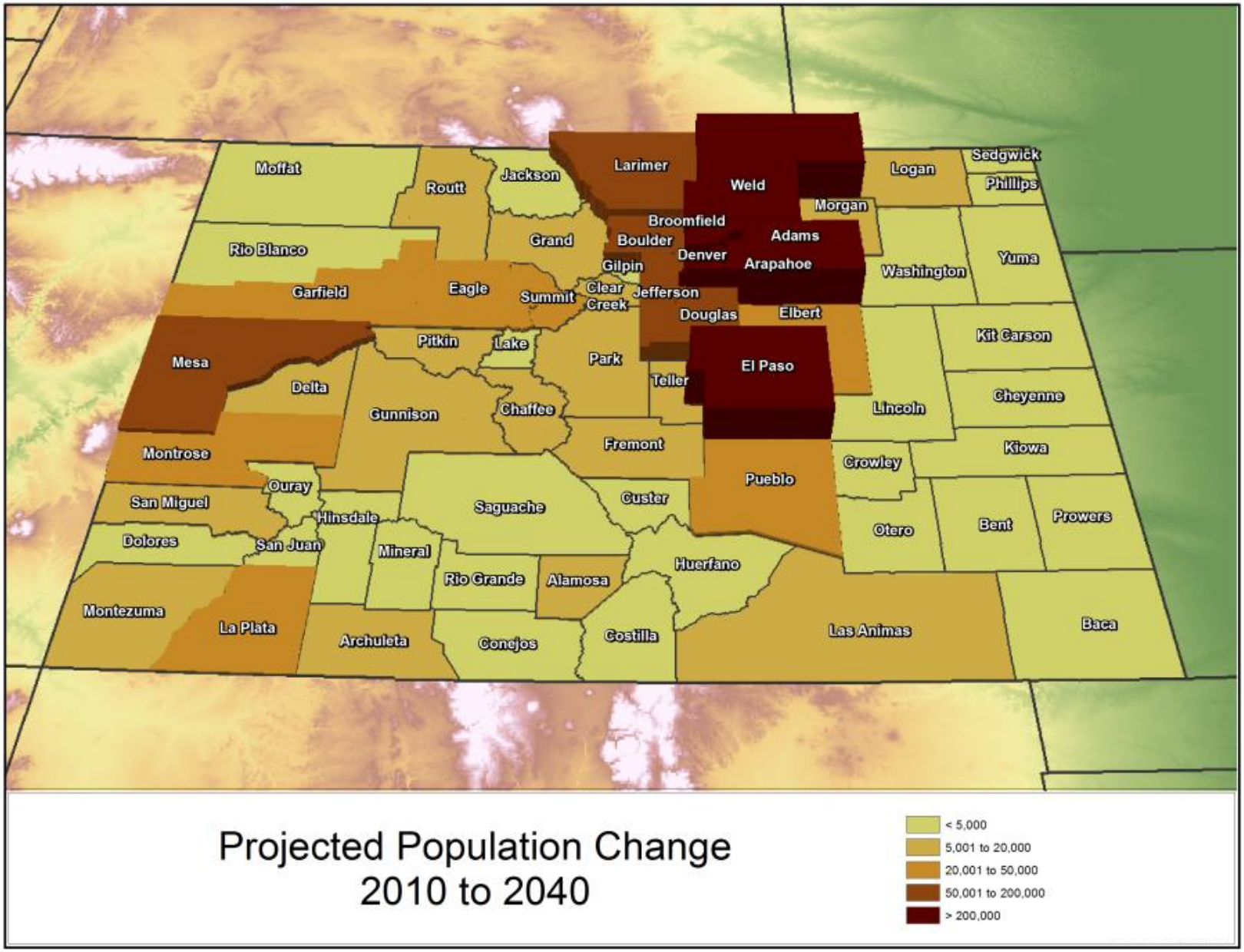


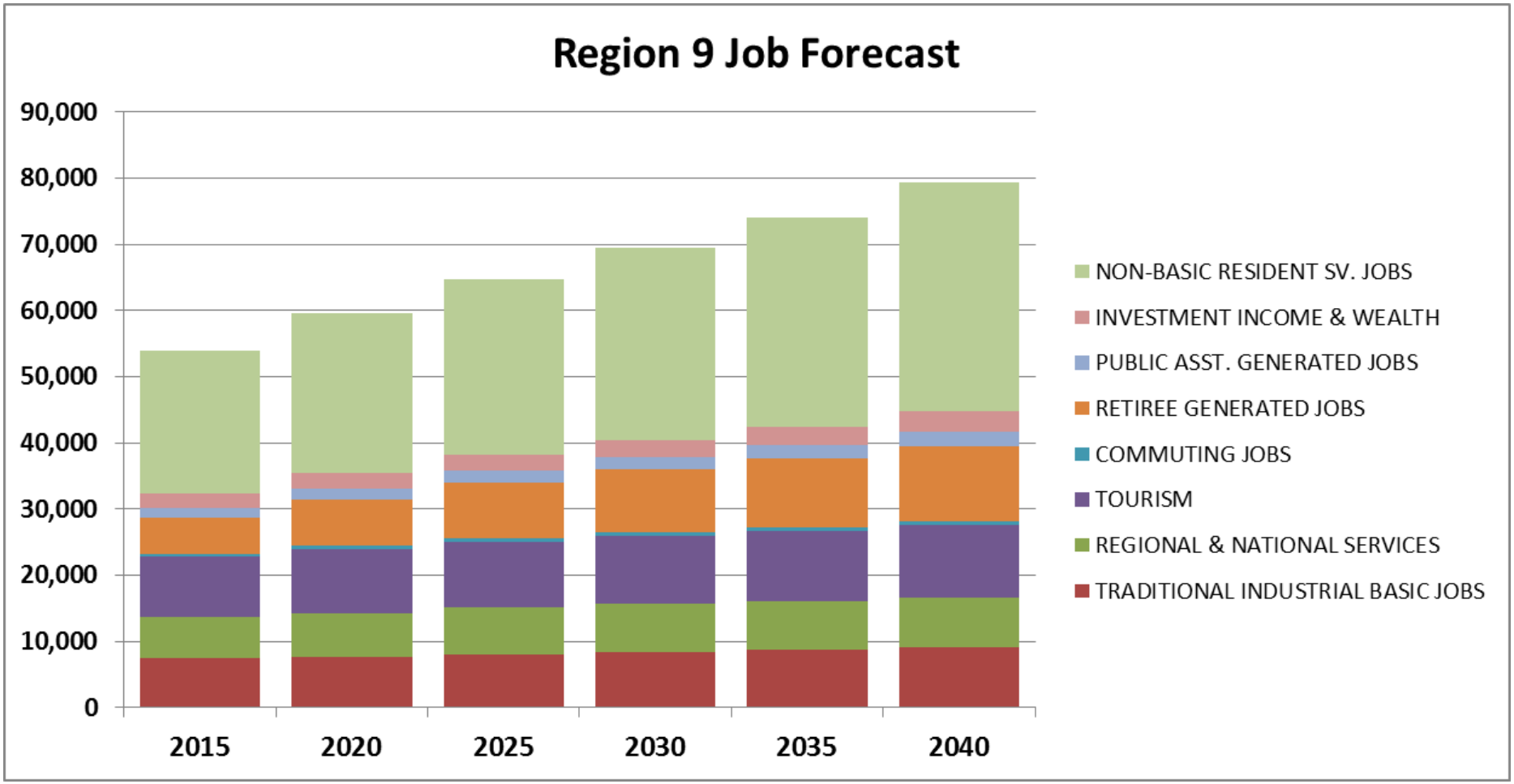
Differences resolved by net migration

Colorado Population Forecast by Region



Source: State Demography Office, 2016

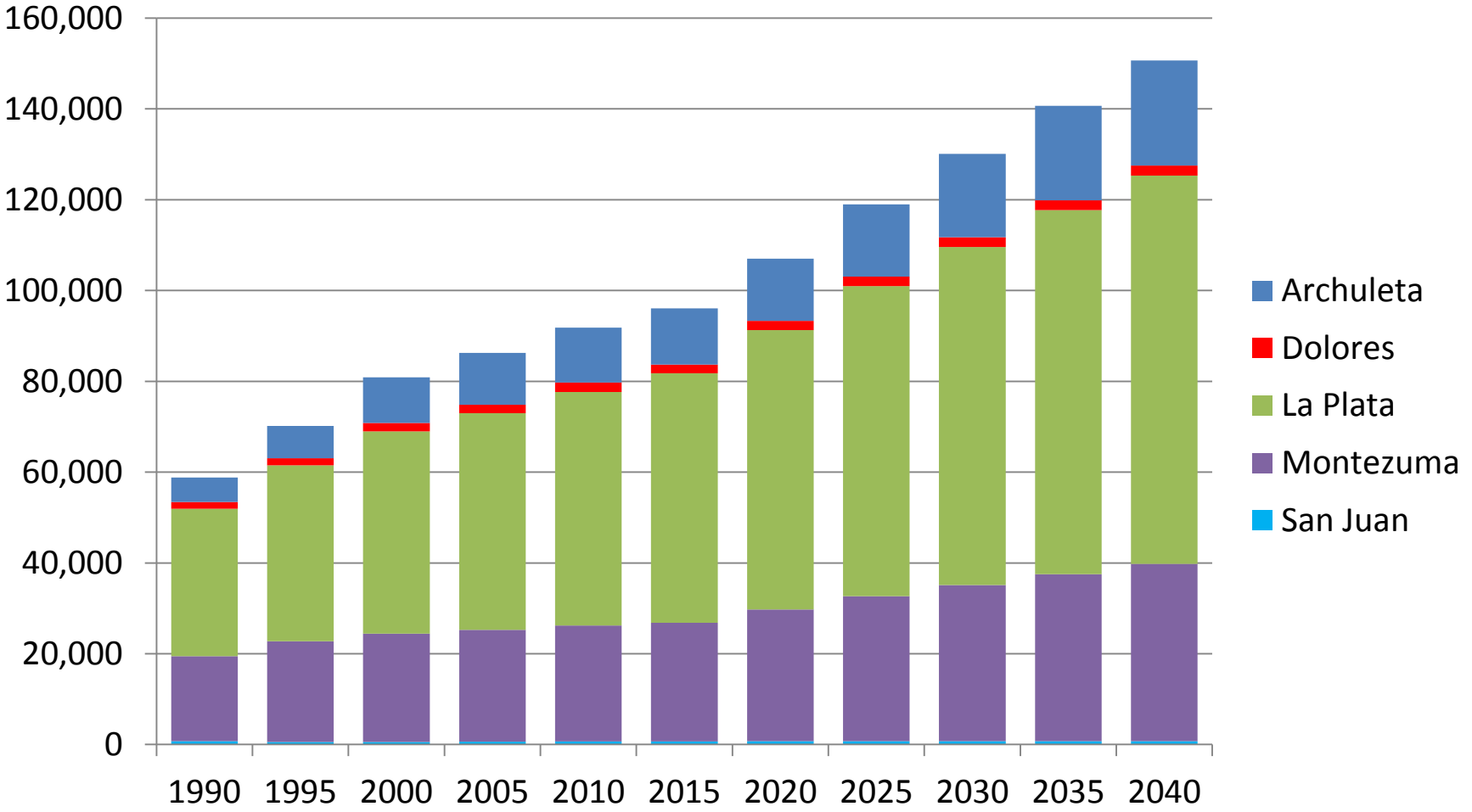

Moffat
Routt
Jackson
Larimer
Weld
Logan
Sedgwick
Phillips
Morgan
Broomfield
Adams
Rio Blanco
Grand
Boulder
Denver
Arapahoe
Yuma
Washington
Gilpin
Garfield
Eagle
Summit
Clear Creek
Jefferson
Douglas
Elbert
Kit Carson
Pitkin
Lake
Park
Mesa
El Paso
Teller
Delta
Gunnison
Chaffee
Lincoln
Cheyenne
Fremont
Kiowa
Montrose
Crowley
Pueblo
Ouray
San Miguel
Saguache
Custer
Hinsdale
Otero
Bent
Prowers
Dolores
San Juan
Mineral
Huerfano
Rio Grande
Alamosa
Montezuma
La Plata
Archuleta
Conejos
Costilla
Las Animas
Baca
Projected Population Change
2010 to 2040
< 5,000
5,001 to 20,000
20,001 to 50,000
50,001 to 200,000
> 200,000


Region 9 Job Forecast
90,000
80,000
70,000
60,000
50,000
40,000
30,000
20,000
10,000
0
2015
2020
2025
2030
2035
2040
NON-BASIC RESIDENT SV. JOBS
INVESTMENT INCOME & WEALTH
PUBLIC ASST. GENERATED JOBS
RETIREE GENERATED JOBS
COMMUTING JOBS
TOURISM
REGIONAL & NATIONAL SERVICES
TRADITIONAL INDUSTRIAL BASIC JOBS

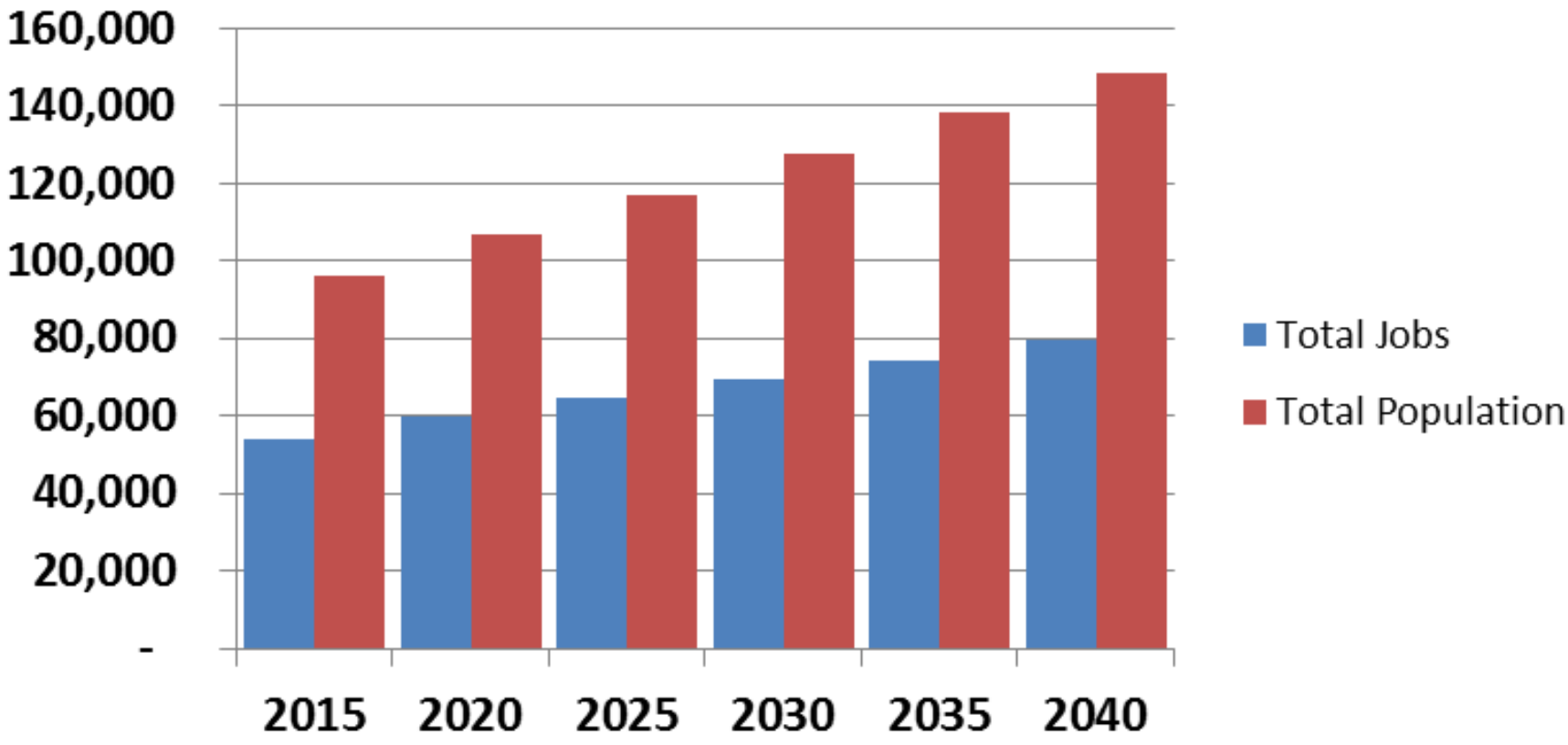
Region 9 Job Forecast

	2015	2020	2025	2030	2035	2040
Archuleta	6,253	7,134	7,799	8,435	9,168	9,978
Dolores	1,105	871	902	926	951	981
La Plata	33,894	37,691	40,907	43,965	46,869	50,145
Montezuma	12,291	13,315	14,408	15,404	16,318	17,298
San Juan	372	430	455	481	506	538
Region 9	53,915	59,442	64,470	69,212	73,812	78,939

Population Estimates (1990-2015) and Forecast (2020-2040) by County



Region 9 Population and Job Forecast



How Do These Trends Impact Us?

- Migration – how do we attract the best fit for the jobs and where do we house them?
- Disparate growth – what is causing it and what can be done? Can linkages be created between Metro and Non-Metro.
- Aging – we are getting old fast, is the state ready for the opportunities and changes to the labor force, income, industrial mix, housing, etc.
- Colorado is becoming more racially and ethnically diverse, especially the newest entrants to the labor force. Educational gap continues. Will we have enough qualified people to fill jobs? Impact on incomes.
- Downward pressure on income due to demographics.
- Growing but slowing – related to aging and slowing US growth.

Thank you

State Demography Office

Department of Local Affairs

Elizabeth Garner

Elizabeth.garner@state.co.us

303-864-7750

Demography.dola.colorado.gov