Regional Profile

SAN LUIS VALLEY REGION

The central work of the State Demography Office is the research and production of population data and information and of the forces (fertility, mortality, migration) that lead to population change. Data and information about the population and the factors that lead to population change are critical for program and local area planning. This profile presents data on the economy and the population for the San Luis region of Colorado.
Colorado’s population as of April 2010 was 5,029,196. Over the decade the population increased by 728,000 and was the 9th fastest growing state in the US. A natural increase (births-deaths) of 392,000 and net migration of 320,000 contributed to the population change in the state over the decade.

Positive net migration of this magnitude was a surprise for many. Most people who migrate to Colorado do so for job opportunities, and over the past decade Colorado experienced two recessions. Colorado’s economy during the first recession at the beginning of the decade was relatively worse than the rest of the US, and this was reflected in low net migration. Conversely, Colorado fared relatively better than the rest of the nation during the second recession at the end of the decade. Despite this downturn net migration has consistently been between 30,000 and 40,000 since 2006.

“...partnership with local communities, the Department of Local Affairs produces the most authoritative demographic and economic data for Colorado’s regions and counties.” - Reeves Brown, Executive Director

Colorado’s population is forecast to increase from 5,029,196 in 2010 to 6 million in 2020 and 7.01 million by 2030. This is an average annual growth rate of 1.7% followed by 1.5%. The forecasted growth rates are slightly slower than the previous decade yet faster than the US rate of 0.9%. The largest share of the population (82.4%) will continue to be along the Front Range with a growing share in the Western Slope, growing from 11% to 12% between 2010 and 2020.

Over the next decade (2010 to 2020) the Colorado population will also change significantly due to aging baby boomers (born 1946 to 1964), many of whom moved in to the state during the energy boom of the 1970s. As this generation ages Colorado’s population over the age of 65, a historically small portion of the population, will increase rapidly. More than 550,000 people over 65 will expand to 892,000 – an increase of 60% over the ten-year period.

Job growth, a significant factor in predicting population growth, is expected to improve in 2012 and 2013 returning to pre-recession employment levels by 2014. Between 2010 and 2015 total jobs (including wage and salary and proprietors) are forecast to increase by 350,000, gaining back the 130,000 lost between 2008 and 2010. An additional gain of 340,000 jobs is expected between 2015 and 2020. Many of these jobs—approximately 10%—are forecast to be driven from growth by retiree spending. Another bright spot is the tourism industry which has also been recovering nationally. Jobs in extractive industries, health services, and business services are also forecast to experience stronger increases.
Region 8 had approximately 22,119 jobs in 2010, a figure that includes the self-employed as well as wage earners. This is slightly up from 2009 at 0.1%, but still down 433 jobs from peak employment in 2008. The largest source of increases in jobs were in Agriculture 325 (9.3%) followed by Manufacturing 30 (8%). There were declines in Government (-90), Wholesale Trade (-85) and Construction (-78).

The largest sources of jobs are from Government (including local government) 22% (4,864), Agriculture 17% (3,826), Health Services 11% (2,393) and Retail Trade 10% (2,210).
PER CAPITA PERSONAL INCOME (2009)

<table>
<thead>
<tr>
<th>Region</th>
<th>Per Capita Personal Income</th>
</tr>
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<tbody>
<tr>
<td>Alamosa</td>
<td>$32,265</td>
</tr>
<tr>
<td>Conejos</td>
<td>25,620</td>
</tr>
<tr>
<td>Costilla</td>
<td>31,167</td>
</tr>
<tr>
<td>Mineral</td>
<td>33,109</td>
</tr>
<tr>
<td>Rio Grande</td>
<td>34,793</td>
</tr>
<tr>
<td>Saguache</td>
<td>21,118</td>
</tr>
<tr>
<td>Colorado</td>
<td>$41,895</td>
</tr>
<tr>
<td>US</td>
<td>$39,635</td>
</tr>
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</table>

Source: Bureau of Economic Analysis

INCOME

Income is an important measure of economic health and widely reported. It cannot simply be viewed by itself; equally important are demographic characteristics that impact income levels.

Real (inflation adjusted) per capita personal income in Region 8 increased an average of 2.6% annually compared to the State, which showed a modest annual average increase of 0.3%. Increases in real per capita personal income occurred in Region 8 through 2009, which is unusual in the state.

Residents of Region 8 receive about 57% of their income from earnings, which is much lower than the state average of 70%. Investment income represents about 16% of the income in the region, below the state average of 18%. Region 8 receives a larger share of government transfers (government payments to individuals) at 27% compared to the state at 12%. Region 8 has a much larger share of retirees than the state as a whole, which explains most of this difference.

Income from transfers was the only portion that noticeably grew since 2001, and it did so quickly—an average of 7.5% annually over the past eight years. Payments such as Medicare and Medicaid account for most of the growth in Transfer Payments.

Components of Income (2009)

While not the largest sources of income, dividends, interest, and rent as well as transfer payments have been increasing as a portion of total income.

Source: Bureau of Economic Analysis
Region 8 Socioeconomic Profile

BASE ANALYSIS

Agriculture in region 8 is the primary economic driver supporting approximately 4,700 jobs in the region. Households – especially retirees – bring significant amounts of money and support nearly 2,300 jobs. This is not diminish the importance of Regional and National Services like education and health care – it supports nearly 2,000 jobs. Government employment in the region is also an important driver, employing nearly 1,700 jobs.

Although income from agriculture may be volatile and fluctuate with global markets and growing conditions, employment and income from Households, Government, and Education and Health Services tend to be relatively stable. This is not to say that they are entirely insulated from an economic downturn as governments search for cost savings.

HOUSEHOLD BASIC

Retirees drive 56% of household basic jobs. This segment of the population is expected to increase an average of 3.6% annually from 2010—2020.

Source: State Demography Office
LOOKING TO THE FUTURE

The outlook for direct basic job growth in Region 8 from 2010-2015 is projected to be faster than the last 5 years, increasing by around 1.5% per year or around 240 jobs per year. By 2015 the Region is forecast to gain approximately 1,200 base jobs.

Job growth is forecast across most base industries including traditional basic (agriculture, mining, manufacturing, government) +500, Regional and National Services +200, Tourism +250, and Household Basic+300. Within Household Basic, the largest component is forecast to be jobs related to retiree spending.

Not all base industries support the same number of local resident service positions. Retiree generated jobs tend to be in service industries with lower income. The secondary jobs created from their spending are smaller. However, over time in Region 8, the ratio of secondary jobs to direct basic jobs will remain close to the same given large increases in Traditional and Regional and National Services base jobs.

From 2010 to 2015 the region’s economy should add approximately 1,500 new jobs, averaging 1.3% annual growth.
The population of the region in 2010 was 46,173. This represents an increase of 0.7% since 2009. The population in the region in the year 2000 was 46,430. The population declines at an annual rate of 0.1% from 2000 to 2010. Most of the growth during the decade has been in Alamosa and Saguache counties, while Conejos and Costilla counties in the south recorded declines.
From 2000 to 2010 the Asian population grew faster than any other race or ethnic group, increasing 45% to comprise 2.8% of the state population. The Hispanic population, Colorado’s second largest racial/ethnic group increased 41% to comprise 20% of the state population. Black non-Hispanics increased 19% (3.7% of total), White non-Hispanics increased 9.9% (70% of total) and all other non-White non-Hispanic race/ethnic groups decreased 11%.

Half of Region 8’s population identified themselves as White non-Hispanic, while 47% identified themselves as Hispanic. The White non-Hispanic population decreased by 2% from 2000 to 2010 and the Hispanic population increased by 1%. During the same time period, all other non-White non-Hispanic groups declined by -42%. The population as a whole remained the same.

<table>
<thead>
<tr>
<th>Region</th>
<th>Total</th>
<th>White non-Hispanic</th>
<th>Hispanic</th>
<th>Other, non-White</th>
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<td>Alamosa</td>
<td>15,445</td>
<td>7,667</td>
<td>7,110</td>
<td>668</td>
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<tr>
<td>Conejos</td>
<td>8,256</td>
<td>3,451</td>
<td>4,620</td>
<td>185</td>
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<tr>
<td>Costilla</td>
<td>3,524</td>
<td>1,086</td>
<td>2,327</td>
<td>111</td>
</tr>
<tr>
<td>Mineral</td>
<td>712</td>
<td>678</td>
<td>21</td>
<td>13</td>
</tr>
<tr>
<td>Rio Grande</td>
<td>11,982</td>
<td>6,600</td>
<td>5,086</td>
<td>296</td>
</tr>
<tr>
<td>Saguache</td>
<td>6,108</td>
<td>3,446</td>
<td>2,452</td>
<td>210</td>
</tr>
</tbody>
</table>

Source: US Census Bureau

Colorado’s population is becoming more diverse, especially at the younger ages. The Hispanic and Other non-White population under 18 are 42% of the population and are 15% of the population over 65. Region 8 is more diverse by race and age than the state, although there remains a significant difference between the under 18 and over 65 age group. The Hispanic and other non-White population under 18 are 60% of the population compared to 39% of the population over 65.

By age, nearly 30% of the Region’s population was between the ages of 45 and 64 in 2010, followed by 25% of the population under the age of 18.

Source: US Census Bureau
HOUSEHOLDS

Of the region’s 46,173 people, 992 live in group quarters – mostly in nursing homes, the remaining 45,181 in households. The region averages 2.45 persons per household (occupied housing units) with Conejos County having a higher ratio (of 2.65) relative to other counties in the region. The region’s 26.6% overall vacancy rate includes significant portions of houses used for seasonal recreational purposes. Mineral County has the highest vacancy rate of 70.4% in the region.

HOUSEHOLDS BY TYPE

The household population can be split into several different types. This is especially useful in determining housing needs and planning communities. Region 8 has a larger portion family households than the state average. A lower portion of these households have children than the state average in all counties except Conejos County.

Non-family households, especially single person non-family households, grew faster than the state average except in Conejos County and Rio Grande County. Region 8 has a larger concentration of households composed of a single person over age 65 than the state.
POVERTY

The percentage of the total population in 2010 in poverty in Region 8 is higher than the state average of 12.2%. Most of the counties in Region 8 rank towards the highest percentage of poverty in the state. The percentage of children in poverty was slightly lower in Region 8 than the state average of 16.2% although multiple counties do have a larger percentage.

The US Department of Health and Human Services annually sets the income thresholds by family size. The Census Bureau then determines the number of people and children (and other characteristics) above and below that income threshold. The income threshold for a family of four (in this case age does not matter) with two minors, for example, was $22,350 in 2010.

EDUCATION

The share of the population with a bachelor’s degree or higher in Region 8 is fairly consistent across the counties with the exception of Mineral County, which is higher. The average share is lower in Region 8 (21.6%) than the state average of 35%. On average for the region, 30.8% of the population have high school degrees and another 30.3% have some college or an associate’s degree.
The median age of the region on July 1, 2010 was 38.8 as compared to the state’s median age of 36.1. This is mainly due to the somewhat larger proportions of the population over 45 relative to the state. The median ages of the region is expected to decline to 37.6 with the additions of new worker-related families while that of the state is expected to rise to 37.6 by 2030 with the aging of the baby boomers during this period.

From 2010 to 2020, the population over the age of 65 will grow an average of 3.6 percent annually, slower than the state average of 4.9 percent.

FUTURE POPULATION CHANGE

The population of the region is expected to grow at annual rates over 1% per year over the next twenty five years. Some of this is related to extensions in agriculture and developments related to solar energy. Lastly, the region will see some increases in retirees as its own baby-boomers retire.
The separate forecasts of the jobs and the population of a county are integrated through an analysis of the labor market. The analysis reviews whether the population forecast in the demographic model and the workforce they are expected to supply will be sufficient to meet the demands of the economy created through the jobs forecast. If not, the migration assumption in the demographic model is adjusted so that the jobs supplied by the population are more in line with the jobs forecast.

The analysis begins with the labor force participation rates being applied to the population forecasts of the non-institutional population over age 16 by age and gender to produce a forecast of the labor force for the projected population. The forecasted numbers of unemployed persons are then subtracted from the labor force and a forecast of the number of employed persons results. This number combined with the number of second third jobs held by multiple job holders yields the total number of jobs held by residents. The net number of commuters is then added or subtracted resulting in the number of total local jobs as derived from the population. This number is then reconciled with the number of total jobs as it is derived from a forecast of the base jobs (exports) within a county. A multiplier is applied to the forecasted number of base jobs to derive the resulting number of local resident service jobs that are then added to the forecast of base jobs to determine the final number of total local jobs. This analysis is essential to establishing an appropriate relationship between the forecasted number of jobs and the forecast of the population within a county.

Retirees generate fewer jobs than traditional base industries, so retiree growth can cause the population as a whole to increase more quickly than jobs. This in part explains the large gap between job and population growth through 2025.
LABOR FORECASTS

FORECASTING WORKSHEETS

The forecasting worksheets attempt to integrate and/or reconcile the economic forecast of total jobs with the population forecast. The rates of growth of these two key variables can differ somewhat because of changes in the labor market, i.e., labor force participation rates, unemployment rates, multiple job holding, and/or commuting. For example, between 2010 and 2015 job growth in the region is expected to be 1.3% per year while population growth will be 1.2%. This slightly faster growth in jobs relative to population is the result of an increase in the labor force participation rate of residents. The participation rate is expected to continue to increase through 2025, after which time labor force growth will begin to slow relative to population growth as a result of the growing share of persons over the age of 65.

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2015</th>
<th>2025</th>
<th>2035</th>
</tr>
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<tbody>
<tr>
<td>TOTAL DIRECT BASIC JOBS</td>
<td>15,412</td>
<td>16,620</td>
<td>19,057</td>
<td>21,004</td>
</tr>
<tr>
<td>Total Jobs / Total Direct Basic Jobs</td>
<td>1.5</td>
<td>1.4</td>
<td>1.4</td>
<td>1.4</td>
</tr>
<tr>
<td>TOTAL JOBS</td>
<td>22,504</td>
<td>23,975</td>
<td>27,085</td>
<td>29,730</td>
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<tr>
<td>Average Annual Percent Change</td>
<td>0.4%</td>
<td>1.3%</td>
<td>1.2%</td>
<td>0.9%</td>
</tr>
<tr>
<td>*Statistical Discrepancy</td>
<td>3,115</td>
<td>2,004</td>
<td>1,419</td>
<td>1,301</td>
</tr>
<tr>
<td>JOBS HELD (In Area by Res. &amp; Non-Res)</td>
<td>18,433</td>
<td>21,605</td>
<td>25,636</td>
<td>28,516</td>
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<tr>
<td>Average Annual Percent Change</td>
<td>-1.4%</td>
<td>3.2%</td>
<td>1.7%</td>
<td>1.1%</td>
</tr>
<tr>
<td>+ Commuters (+ = IN)</td>
<td>840</td>
<td>249</td>
<td>-87</td>
<td>-203</td>
</tr>
<tr>
<td>= JOBS HELD BY RESIDENTS</td>
<td>18,433</td>
<td>21,605</td>
<td>25,636</td>
<td>28,516</td>
</tr>
<tr>
<td>= Employed Persons (Residents)</td>
<td>1,289</td>
<td>1,370</td>
<td>1,610</td>
<td>1,779</td>
</tr>
<tr>
<td>- Unemployed Persons</td>
<td>2,533</td>
<td>1,807</td>
<td>1,938</td>
<td>2,178</td>
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<tr>
<td>Unemployment Rate</td>
<td>12.9%</td>
<td>8.2%</td>
<td>7.5%</td>
<td>7.5%</td>
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<tr>
<td>LABOR FORCE (RESIDENTS)</td>
<td>19,677</td>
<td>22,042</td>
<td>25,964</td>
<td>28,915</td>
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<tr>
<td>Labor Force Participation Rate</td>
<td>55.7%</td>
<td>58.5%</td>
<td>59.7%</td>
<td>59.2%</td>
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<tr>
<td>POPULATION - CENSUS BASED</td>
<td>46,147</td>
<td>49,006</td>
<td>56,642</td>
<td>63,828</td>
</tr>
<tr>
<td>Average Annual Percent Change</td>
<td>-0.1%</td>
<td>1.2%</td>
<td>1.5%</td>
<td>1.2%</td>
</tr>
</tbody>
</table>

LABOR FORCE PARTICIPATION

Changes in the overall or total labor force participation rate(s) (LFPR) are really a function of changes LFPR by age and gender and changes in the relative proportions in each. In general, LFPR for each age–gender group are expected to rise slightly to 2025. Those of women -- especially those in upper age groups -- are expected to increase more substantially, as the result of greater women’s participation in younger age groups in past decades. Changes in the overall or total LFPR of a region, if it’s declining, are due to increases in the number of people in younger or older age groups where participation rates are expected to remain relatively low.

Labor Force Participation Rates by Age Group

Source: State Demography Office
COMMUTING

Commuter flows are significant in reconciling a region’s jobs with its population. A region could have a completely different population during business hours compared to night time, and often different regions are inextricably connected by these flows.

The US Census Bureau, in cooperation with several other federal agencies, compiles information that reconciles place of residence with place of employment.

The specific employment numbers differ from those used in the forecasting worksheets because both the labor and population data come from different sources than those used by the State Demography Office. This resource still provides valuable information about commuter flows.

Each map presented shows the number of in-commuters, the number of residents who live and are employed in the specified county, and the number of out-residents. Additionally, a table next to each map shows origin and destination counties of commuters.

The most recent year of data available at the time of this publication was 2010. All jobs are primary jobs—second job holders are excluded from commuting numbers.

ALAMOSA COUNTY

Alamosa County Commuter Flows

Top 5 In-Commuter Origins
- Rio Grande County, CO: 770
- Conejos County, CO: 741
- Costilla County, CO: 154
- El Paso County, CO: 152
- Pueblo County, CO: 133

Top 5 Out-Commuter Destinations
- Rio Grande County, CO: 428
- El Paso County, CO: 224
- Denver County, CO: 194
- Pueblo County, CO: 170
- Arapahoe County, CO: 131

Source: Census LEHD

Photo credit: foto footprints/flickr
COMMUTING—CONEJOS COUNTY

Conejos County Commuter Flows

Top 5 In-Commuter Origins
- Alamosa County, CO: 73
- Rio Arriba County, NM: 21
- Costilla County, CO: 16
- Rio Grande County, CO: 13
- Huerfano County, CO: 8

Top 5 Out-Commuter Destinations
- Alamosa County, CO: 154
- Pueblo County, CO: 43
- Taos County, NM: 40
- El Paso County, CO: 31
- Santa Fe County, NM: 27

Source: Census LEHD

COMMUTING—COSTILLA COUNTY

Costilla County Commuter Flows

Top 5 In-Commuter Origins
- Alamosa County, CO: 57
- Rio Grande County, CO: 20
- Conejos County, CO: 10
- Fremont County, CO: 4
- Huerfano County, CO: 3

Top 5 Out-Commuter Destinations
- Alamosa County, CO: 125
- Denver County, CO: 90
- Rio Grande County, CO: 90
- El Paso County, CO: 80
- Taos County, NM: 65

Source: Census LEHD
COMMUTING—MINERAL COUNTY

Mineral County Commuter Flows

Source: Census LEHD

COMMUTING—RIO GRANDE COUNTY

Rio Grande County Commuter Flows

Source: Census LEHD

COMMUTING (2010 DATA)

Top 5 In-Commuter Origins
- Gunnison County, CO: 26
- Rio Grande County, CO: 26
- La Plata County, CO: 6
- Mesa County, CO: 6
- Archuleta County, CO: 4

Top 5 Out-Commuter Destinations
- Alamosa County, CO: 428
- Saguache County, CO: 143
- Conejos County, CO: 90
- El Paso County, CO: 36
- Jefferson County, CO: 31

Top 5 In-Commuter Origins
- Alamosa County, CO: 770
- Saguache County, CO: 493
- Denver County, CO: 136
- El Paso County, CO: 128
- Arapahoe County, CO: 87
Saguache County Commuter Flows

**Top 5 In-Commuter Origins**
- Rio Grande County, CO: 493
- Alamosa County, CO: 64
- El Paso County, CO: 13
- Conejos County, CO: 10
- Jefferson County, CO: 10

**Top 5 Out-Commuter Destinations**
- Rio Grande County, CO: 143
- Alamosa County, CO: 120
- Chaffee County, CO: 59
- El Paso County, CO: 44
- Denver County, CO: 37

Source: Census LEHD
STATE DEMOGRAPHY OFFICE

The State Demography Office is the primary state agency for population and demographic information. Its data are used by state agencies to forecast demand for facilities and services. These data are also used by local governments and non-profit organizations in the state to anticipate growth or decline and to plan and develop programs and community resources. The office’s location in the Department of Local Affairs insures that its data and information is developed in ways that account for local input and needs. The office makes the data publicly available on their website, answers requests for economic and demographic data and provides training workshops on accessing and using the data.

COLORADO DEPARTMENT OF LOCAL AFFAIRS

For many communities throughout Colorado, the Department of Local Affairs is the “face of state government” — that initial and primary point of contact where local communities work in partnership with the state. Our department’s mission statement, "Strengthening Colorado Communities," exemplifies the level of responsiveness and attentiveness that lies at the heart of our services.

Through financial and technical assistance, emergency management services, property tax administration and programs addressing affordable housing and homelessness, our department works in cooperation with local communities. It is through that work where we learn firsthand how to build on the strengths, unique qualities and priorities of Colorado.

Strengthening Colorado Communities

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### Appendix: Sources and Web Locations for Data

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<thead>
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<th>Topic</th>
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