
Region 9 Economic Snapshot – 2022 Update

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Notes on Sources - The release of county level economic information lags about two years behind the current year, so 2020 is the benchmark year for this report. The Demography Section - Colorado Division of Local Government (CDLG) provided employment and income estimates using 2020 data from the Colorado Department of Labor (ES202) and information from the Bureau of Economic Analysis (BEA). That data was provided in the framework of the North American Industry Classification System (NAICS). Total Personal Income (TPI), and Per Capita Income (PCI), is also supplied by the BEA. Unemployment data is drawn from the Colorado Department of Labor and Employment – Local Area Unemployment Statistics (LAUS) Program, these data are not seasonally adjusted. Links to data sources, as well as a **Glossary and links** are included to provide a better understanding of key terms and concepts used in this report.

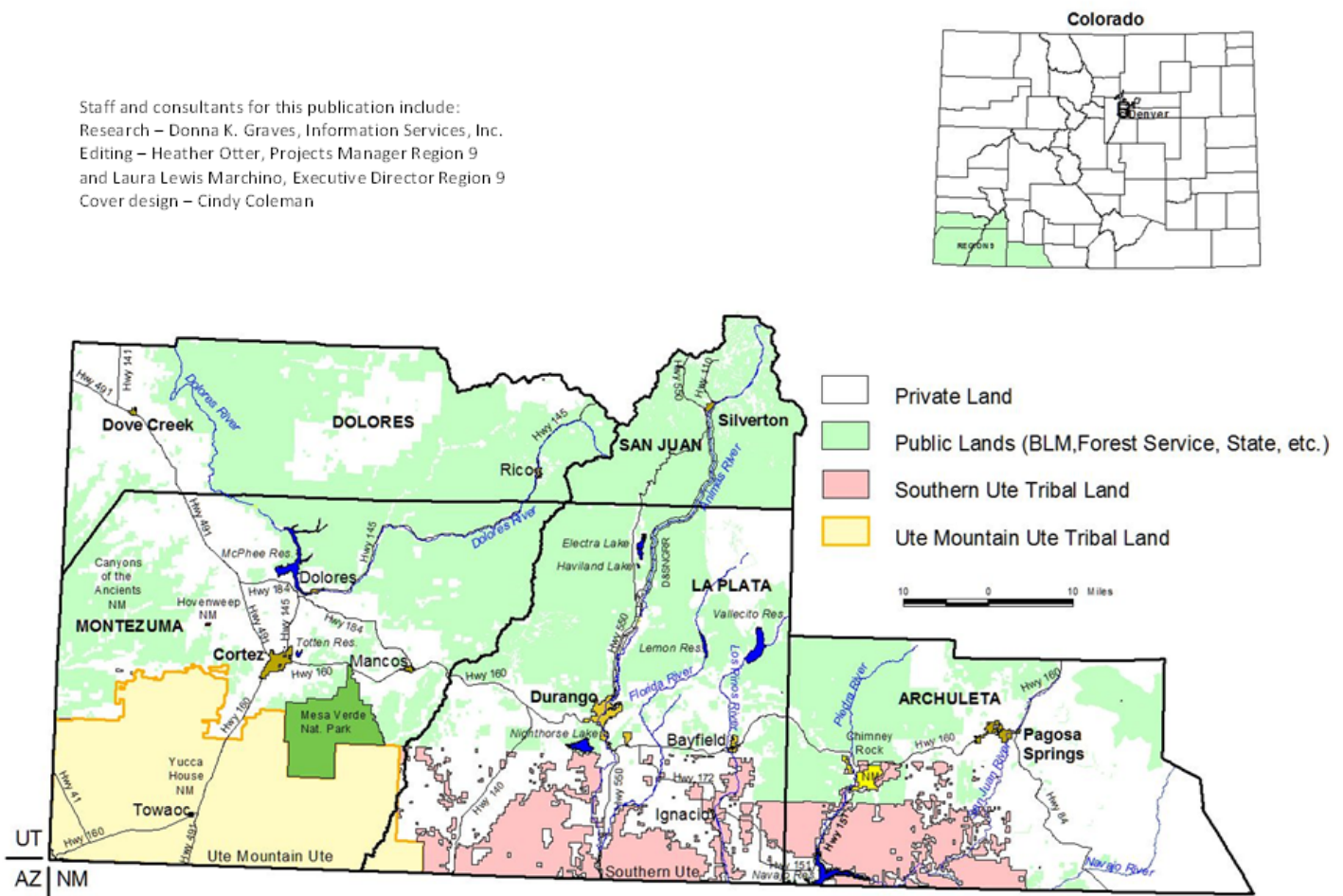
INTRODUCTION

The Region 9 Economic Development District of Southwest Colorado, Inc. (Region 9) is a nonprofit, 501 (c) 6 public private partnership that promotes and coordinates economic development efforts throughout southwest Colorado. Region 9 includes five counties, ten municipalities, the Southern Ute Indian Tribe, and the Ute Mountain Ute Tribe. Incorporated in 1989, Region 9 has a board of directors with 17 representatives from local governmental jurisdictions and 9 from the private sector. Activities include business loans and financing, Enterprise Zone Administration, special projects, the Southwest Colorado Accelerator Program for Entrepreneurs (SCAPE) and serving as fiscal agent for the San Juan Development Association (SJDA).

Region 9 provides technical assistance for grant and data research, information on business incentives and project coordination. Region 9 oversees the region’s strategic plan for economic growth, known as the Comprehensive Economic Development Strategy (CEDs). Region 9 also helps local governments access federal and state funding for infrastructure improvements and community amenities that result in job creation/retention, or that are of economic benefit to a community. Finally, Region 9 is a Colorado State Data Center local affiliate, and provides reliable, unbiased, and timely regional socio-economic data to citizens and policymakers. Region 9 collaborates on reports designed to track community related data, such as, economic trends, economic impact studies, livable wages, and other topics. All of the District’s reports can be found at www.region9edd.org.

Region 9’s boundaries encompass 6,584 square miles in the southwest corner of the state and contain 6.3% of the total land area in Colorado (104,247 sq. miles). The eastern and northeastern areas include the rugged San Juan Range of the Rocky Mountains, with peaks rising above 14,000 feet. Part of the Colorado Plateau – a landform characterized by sparsely vegetated plateaus, mesas, and deep canyons – defines the western area where the lowest elevation is about 6,000 feet. The headwaters of several tributaries to the Colorado River are located in the high country. Drainages flow to the west and southwest from the Continental Divide, eventually feeding the San Juan River, which flows into the Colorado River. The mountain headwaters receive most of the region’s precipitation, mostly in snowfall, while the lower elevations have arid and semi-arid climates. Snowmelt is stored in reservoirs throughout the region for use later in the year.

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Public lands make up 45% of the district; 38% are private lands and 17% are tribal lands. Major areas of public lands include the **San Juan National Forest (SJNF)**, which encompasses over 1.8 million acres, including the 499,771-acre Weminuche Wilderness (the largest designated wilderness area in Colorado); the recently designated 37,236-acre Hermosa Creek Wilderness; and Chimney Rock National Monument (one of America’s newest National Monuments).

The other major public land manager, the **Bureau of Land Management (BLM)**, administers the federal mineral estate underlying private lands (known as split estate) and has trust responsibility for mineral management on 800,000 acres of Tribal lands. The BLM also manages the Canyons of the Ancients National Monument, a 176,000 acre area rich in archaeological sites. The **National Park Service (NPS)** administers Mesa Verde National Park, a world heritage site, and the lesser-known cultural sites of Hovenweep and Yucca House National Monuments. The **Bureau of Reclamation** also has an influential presence in the region as the entity involved in the construction of numerous reservoirs and water delivery systems. Some of these improvements are now managed either in partnership with the USFS and/or by the state, local communities, or districts.

Two Ute Tribes manage the tribal lands in the region. The **Ute Mountain Ute Tribe** has acreage on its reservation in La Plata and Montezuma Counties in Colorado, in San Juan County in New Mexico; and in satellite ranching operations. The Tribe also has a presence in southeastern Utah on allotted trust land. Their tribal headquarters is in Towaoc. The reservation of the **Southern Ute Indian Tribe** is located in La Plata and Archuleta Counties, with headquarters located near Ignacio. Unlike other Indian reservations that are all contained within one boundary, some of the Southern Ute lands are not contiguous. The Tribes provided information regarding their history, governance, and economies, which is showcased in a current edition of the Colorado Business Economic Outlook 2022 (p.160) and summarized in this report. https://www.colorado.edu/business/sites/default/files/attached-files/2022_cbeo_book_final_lr_1206.pdf

Like much of the state, southwestern Colorado has seen growth and change in recent years, providing a catalyst for new opportunities. Region 9 works within this framework to encourage flexible and resilient economic development strategies. A long-standing regional goal has been to minimize the relative impact of any sudden change in fortunes, hence employment, of any (large) firm or industry. Events such as a housing bubble or a recession, changes to water quality and availability, or catastrophic events such as wildfires or a global pandemic such as COVID -19, can move the region into unfamiliar and potentially costly scenarios. As such, strategies meant to encourage economic development in this rural region must be flexible and resilient to respond to the unexpected and be open to emerging opportunities. These strategies are discussed at length in the newly updated Southwest Colorado Comprehensive Economic Development Strategy (CEDS) 2021.

https://www.region9edd.org/uploads/CEDS_Update_2021%20-%20Copy%202.pdf

REGIONAL OVERVIEW

Regional Vision – We strive to encourage economic development that preserves our small-town and traditional heritage, takes care of our natural resources, and provides opportunities for our children to stay in Southwest Colorado.

Population Trends

A look at the average annual percentage rate of change for each county gives an idea of population trends in Region 9 from 1970 to 2020. The population within the five counties of Region 9 grew at a rate of about 3.2% from 1990 to 2000, and about 1.4% between 2000 and 2010, with the most growth in Archuleta County.

Average Annual % Change					
	1970-1980	1980-1990	1990-2000	2000-2010	2010-2020
Archuleta	3.0%	3.8%	6.4%	2.0%	1.0%
Dolores	0.1%	-1.0%	2.1%	1.1%	0.1%
La Plata	3.5%	1.7%	3.1%	1.6%	0.8%
Montezuma	2.5%	1.2%	2.5%	0.7%	0.1%
San Juan	0.0%	-1.1%	-2.8%	2.3%	-0.03%
Region 9	2.9%	1.6%	3.2%	1.4%	0.6%

Source: Colorado State Demography Office

Population declines throughout the region were common during the recession (December 2007 - June 2009) as people left the area seeking jobs. Prior to the recession, Dolores and San Juan Counties experienced declines in the mining industry, resulting in job and population losses.

Colorado grew at a rate of 1.4% annually from 2010 to 2020. The regional population grew about 0.6% annually during this time period, from 91,802 to 97,658. Thirty percent of regional growth from 2010 to 2020 was from “natural” change (the net number resulting from comparing births to deaths), and 70% was from net migration. While some people move to the region for economic reasons, such as the availability of jobs, others come for quality of life, which are strongly influenced by the large amounts of public lands in the region.

	2010	2020	Ann. Avg % Change 2010-20
Archuleta	12,060	13,367	1.0%
Dolores	2,060	2,080	0.10%
La Plata	51,441	55,651	0.8%
Montezuma	25,532	25,853	0.1%
San Juan	709	707	-0.03%
Region 9	91,802	97,658	0.6%
Colorado	5,050,332	5,782,914	1.4%

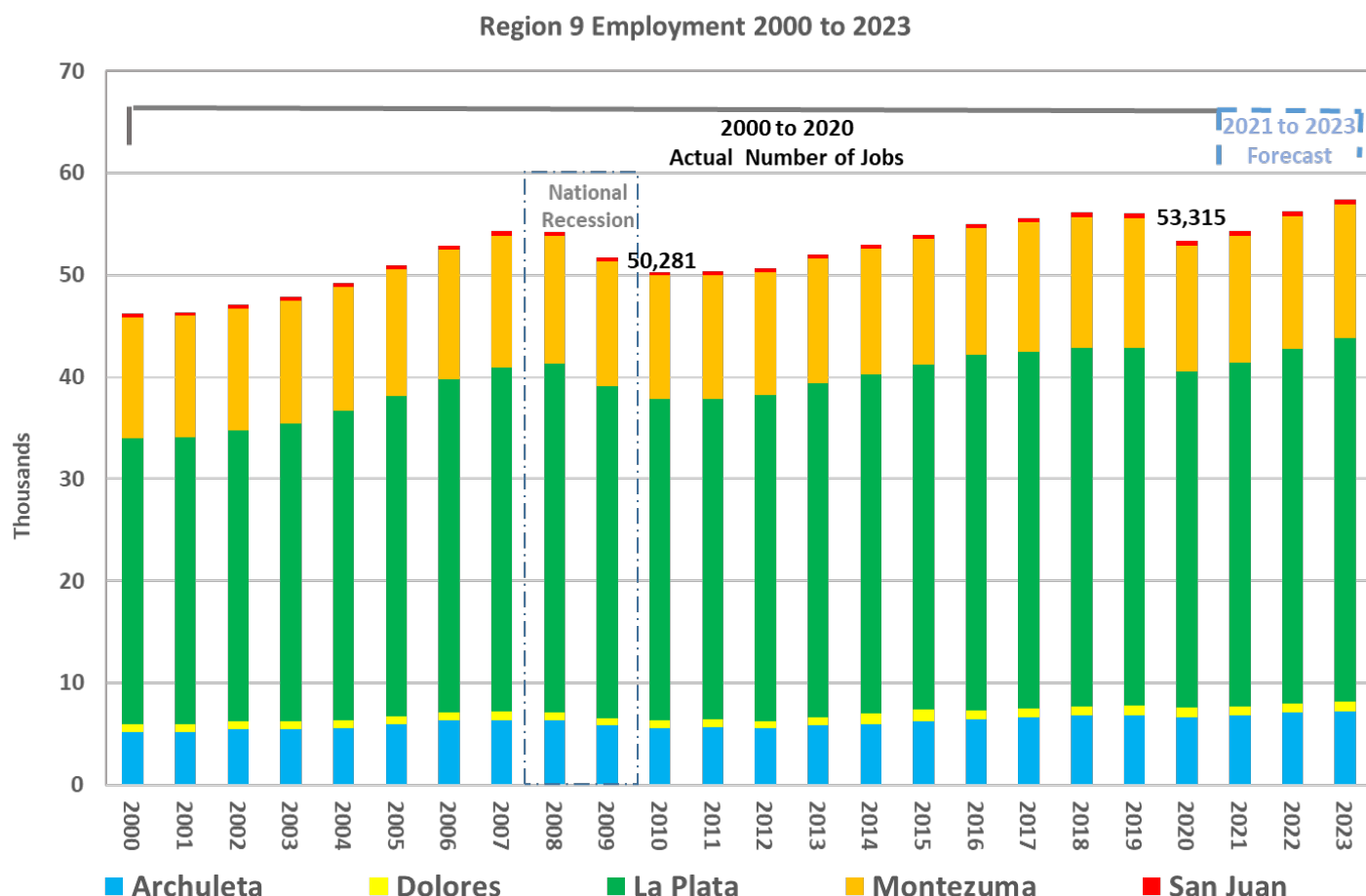
Source: Colorado State Demography Office

Employment Trends

Employees in the region often commute long distances, across state and county lines, to take advantage of better job opportunities, better shopping, or lower real estate prices. The resulting inter-connected economy extends to the entire "Four Corners" area, including southwest Colorado, northwest New Mexico, northeast Arizona, and southeast Utah.

Job growth in the region was steady at about two to four percent per year until the recession of 2007-2009.

Employment reached a regional low of 50,281 jobs in 2010. The region's economic conditions stabilized and were exceeding pre-recession levels until COVID-19 pandemic conditions drove job losses in 2020. Job growth is projected to increase through 2023 if the local economy remains stable.



Data Source: Colorado State Demography Office. Includes proprietors.

Unemployment Rates		
Location	2019	2020
Colorado	2.8%	7.3%
Archuleta	3.2%	7.6%
Dolores	3.0%	6.9%
La Plata	2.5%	6.8%
Montezuma	4.2%	7.1%
San Juan	3.0%	6.7%
USA	3.9%	6.7%

In 2019, some counties saw higher unemployment rates than the state (2.8%) and nation (3.9%). When we compare these rates to those of 2020, we see a much higher unemployment rate across the board due to COVID -19 conditions.

Source: Colorado Labor Market CDLE-LMI

Employment and Income

Region 9 2020 Total Employment	# of Jobs	% of Jobs	*Average Ann. Wage	# Jobs % Change 2019-2020
Agriculture	2,609	5%	\$ 37,847	6%
Mining	706	1%	\$ 74,324	-4%
Utilities	256	0.5%	\$ 91,564	1%
Construction	4,503	8%	\$ 45,383	-8%
Manufacturing	1,351	3%	\$ 40,106	-5%
Wholesale Trade	952	2%	\$ 67,766	-2%
Retail Trade	6,287	12%	\$ 29,169	-1%
Transportation & Warehousing	1,179	2%	\$ 46,016	-7%
Information	569	1%	\$ 67,859	-4%
Finance Activities	1,315	2%	\$ 75,297	-3%
Real Estate	2,188	4%	\$ 40,670	-2%
Professional & Business Services	3,252	6%	\$ 66,903	-2%
Management of Companies and Enterprises	208	0.4%	\$ 113,469	0.5%
Administration and Waste Management	1,946	4%	\$ 35,197	-6%
Private Education	843	2%	\$ 22,049	-5%
Health Services	6,133	12%	\$ 42,829	-2%
Arts, Entertainment, and Recreation	1,535	3%	\$ 19,675	-14%
Accommodation and Food	4,807	9%	\$ 23,872	-16%
Other Services, except Public Administration	2,809	5%	\$ 26,364	-5%
Government	9,628	18%	\$ 52,279	-4%
Sectors Not Disclosed (ND)	239	0.4%		3%
Total	53,315	100%	\$ 42,058	-5%

*Quarterly Census of Employment & Wages (QCEW)

Source: Colorado State Demography Office

Jobs in this chart include 23% proprietors (owners) as well as 77% wage and salary employees. The service sector (including all of the 8 highlighted fields) provided the highest percentage of jobs (41%) in the region. These service jobs include highly paid professionals as well as lower paying unskilled labor. Retail trade employment is substantial in most of Region 9, comprising 12% of total employment, though retail is one of the lowest paying sectors. Government sector jobs are also important in the regional economy, providing 18% of jobs. Recent job growth (2019-2020) is strongest in agriculture (6%). Steep declines in Arts, Entertainment & Recreation (-14%), as well as Accommodations (-16%) are attributed to COVID -19 conditions.

Of the total number of jobs, 68% are in **base industries** (36,362 jobs). Base industries produce exports or derive their sales or income *directly* from outside sources, or *indirectly* by providing supplies to export industries. These activities **bring in outside dollars** to circulate within the local economy. Base analysis distinguishes which industries are responsible for overall economic growth and change. They are also known as economic “drivers.”

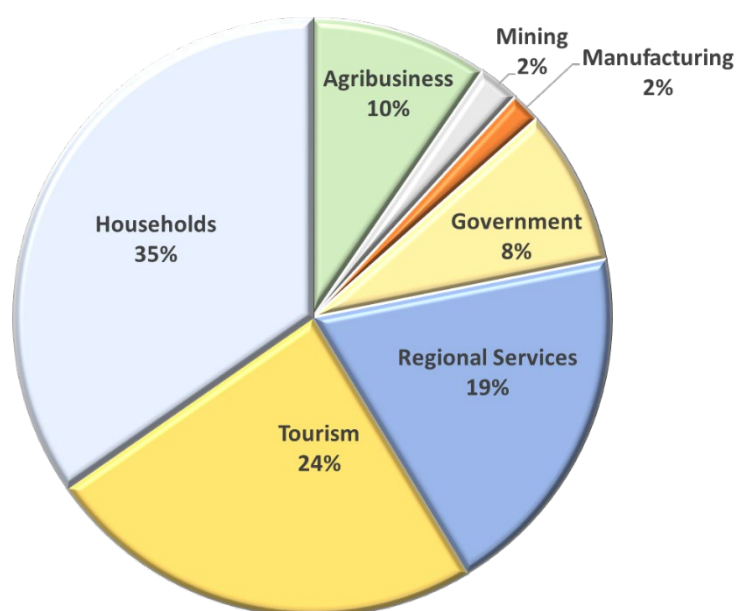
One very important base industry in our region (35% of jobs) is created by **households** that spend money earned elsewhere (commuters), or at a different point in time (retirees). Household spending supports jobs in the local economy, such as the local barber, a nurse, or a clerk in the supermarket where a retiree or commuter shops.

Tourism is also an important base industry in the region (24% of jobs). There are many types of businesses that support the tourist industry, including lodging, second homes (construction and real estate sectors), services (restaurants, wholesale and retail trade, entertainment venues), and transportation (airlines, car rentals, guide services, etc.).

Regional services (19% of jobs) encompass a variety of economic sectors, including Business, Communications, Construction, Education, Finance, Insurance and Real Estate, as well as Trade. Some examples of these services include hospitals, airports, telecommunications systems, and colleges.

See the **Glossary** for more information on Base Industries.

Region 9 Base Analysis



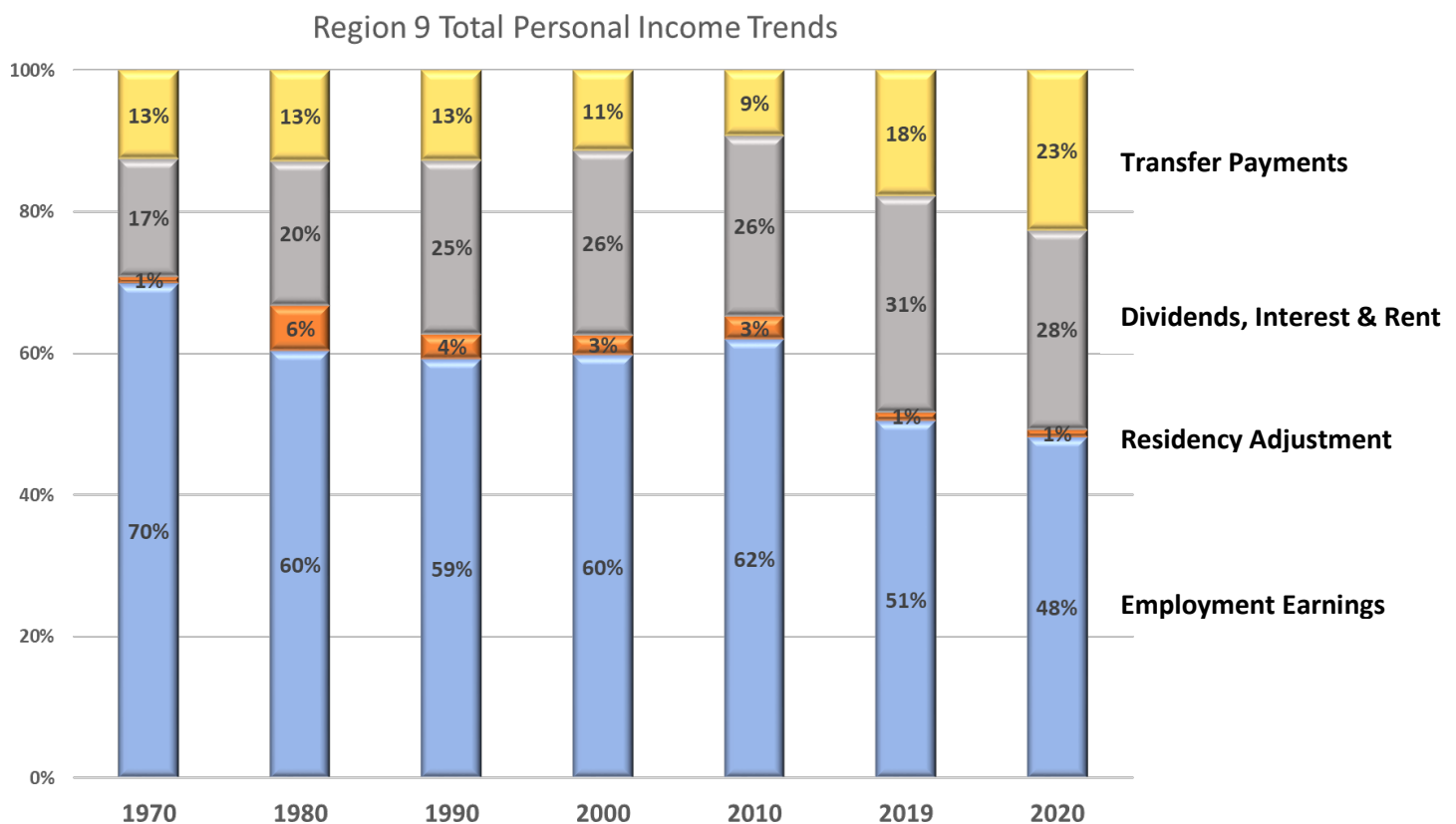
Region 9 - Percentage of Jobs in Base Industries 2020						2020	2019
	Archuleta	Dolores	La Plata	Montezuma	San Juan	Region 9	Region 9
Agribusiness	9%	29%	7%	13%	0%	10%	9%
Mining	1%	2%	3%	2%	0%	2%	2%
Manufacturing	1%	3%	1%	3%	0%	2%	2%
Government	3%	5%	11%	5%	3%	8%	8%
Regional Services	16%	12%	20%	22%	11%	19%	19%
Tourism	31%	8%	27%	15%	50%	24%	26%
Households	40%	41%	31%	40%	36%	35%	33%
Total # jobs	4,860	873	21,099	9,183	349	36,361	37,301

Household spending provides a significant source of employment in Archuleta, Dolores, La Plata, and Montezuma Counties. The San Juan County economy is based primarily on tourism.

Total Personal Income (TPI) is a measure of all sources of income in the region. The four main components of TPI are: employment earnings; residency adjustments; dividends, interest and rent; and transfer payments. For an explanation of what these components include refer to the **Glossary**.

Region 9	2019 TPI	% of	2020 TPI	% of
Total Personal Income	(\$000)	Total	(\$000)	Total
Employment Earnings	\$ 2,624,609	51%	\$ 2,677,469	48%
Residency Adjustment	\$ 65,544	1%	\$ 56,461	1%
Dividends, Interest & Rent	\$ 1,588,221	31%	\$ 1,563,692	28%
Transfer Payments	\$ 917,646	18%	\$ 1,248,230	23%
Estimated TPI	\$ 5,196,020	100%	\$ 5,545,852	100%

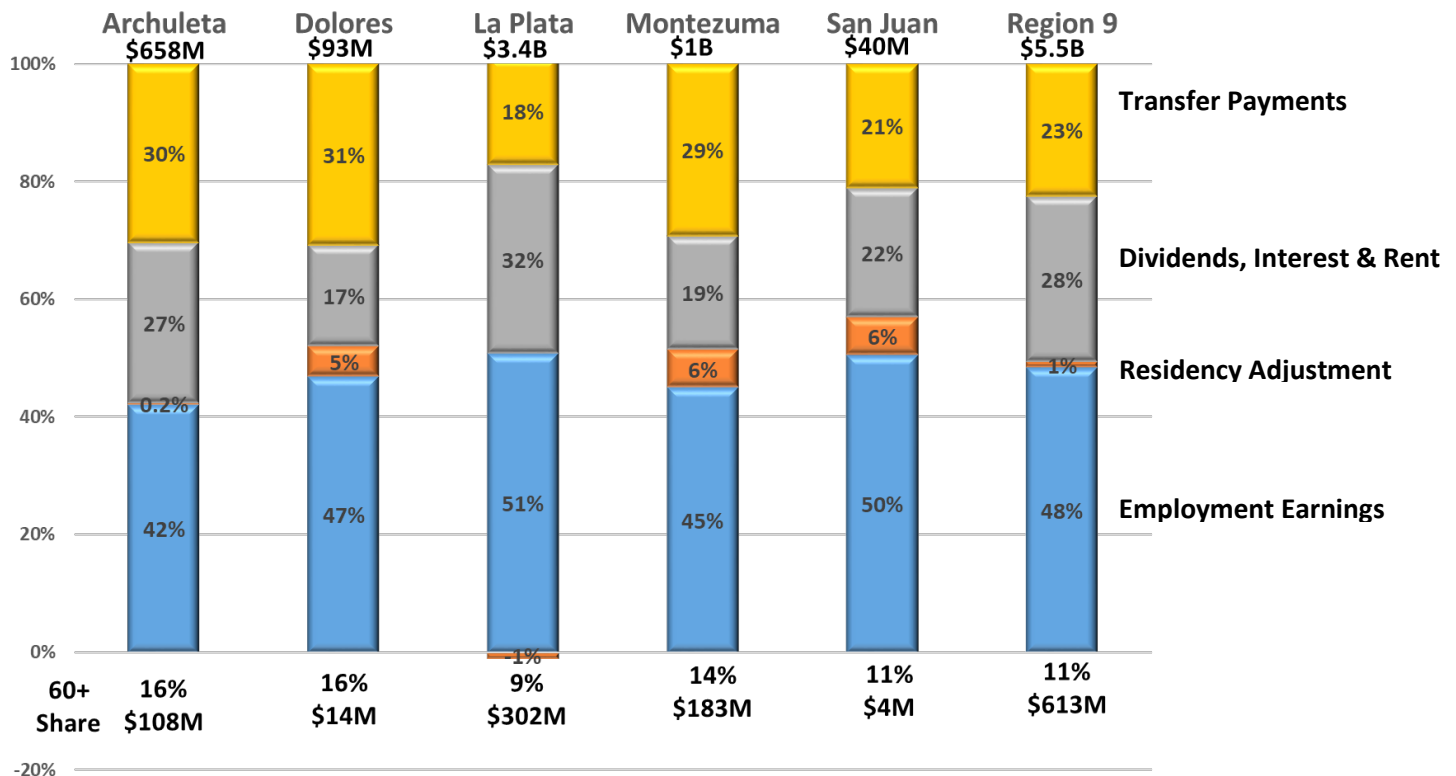
Source: Bureau of Economic Analysis



Between 1970 and 2020, we see a trend of decreasing employment income, and increasing income from dividends, interest and rent. Transfer payments were shrinking, though this trend has seen a reversal as baby boomers retire and receive retirement benefits. COVID-19 conditions also increased transfer payments in 2020.

The five counties in southwest Colorado vary in their composition. Most income is job based (employment), though significant amounts of income enter our regional economy from other sources, such as transfer payments and dividends, interest and rents. Transfer payments to retirees (60+) include social security, disability, government retirement and other public assistance. Regionally, these payments total more than \$613M in 2020.

Total Personal Income 2020



Per Capita Income Comparison				
	2019	2020	% of USA	% of CO
USA	\$ 56,490	\$ 59,510	100%	93%
Colorado	\$ 61,157	\$ 63,776	107%	100%
Archuleta	\$ 43,088	\$ 46,287	78%	73%
Dolores	\$ 38,005	\$ 42,093	71%	66%
La Plata	\$ 58,216	\$ 61,304	103%	96%
Montezuma	\$ 43,542	\$ 46,919	79%	74%
San Juan	\$ 47,933	\$ 50,039	84%	78%

Source: Bureau of Economic Analysis

Per Capita Income (PCI) – All income in a region is added together (TPI), and then divided by the number of residents. In 2020 none of our counties were on par with state and national incomes.

Livable Wages – Under revision

In Colorado, the amount needed to be economically self-sufficient varies by geographic location. We found that in Region 9, Dolores County is the least expensive (\$39,155 annually), and La Plata County is the most expensive place to live (\$55,472 annually) for an adult and one preschooler. The 2018 Colorado minimum wage is \$10.20 per hour, which amounts to \$21,542 per year working full time. Using housing and childcare costs specific to each community we found that Durango is the most expensive community for a family of four (\$31.74 per hour) due to the high cost of housing. Dove Creek is the least expensive community for a family (\$23.99 per hour), while the Town of Dolores is least expensive for a single person (\$10.68).

Housing 2021

Using housing costs specific to each community we found that many families across the region are unable to afford a median priced home in their community.

⁴ Median Home Price in 2020	Jurisdiction	¹ Purchase Price 30 year fixed loan 10% Down 3.25% Interest Rate	² Qualifying Annual Income 30% DTI	³ % of Families with less than Qualifying Income	Number Listings Sold
	Archuleta County - all	\$ 555,200	\$ 103,146	84%	440
\$ 410,000	Pagosa Springs	\$ 524,000	\$ 97,743	90%	469
\$ 179,500	Dolores County - all	\$ 262,500	\$ 52,458	53%	32
\$ 116,750	Dove Creek	\$ 175,000	\$ 37,305	27%	23
NA	Rico	\$ 387,000	\$ 74,018	44%	6
\$ 492,253	La Plata County - all	\$ 596,000	\$ 110,212	67%	938
\$ 330,000	Bayfield	\$ 399,000	\$ 76,097	59%	57
\$ 569,500	Durango	\$ 650,000	\$ 119,563	62%	175
\$ 247,000	Ignacio	\$ 237,000	\$ 48,042	29%	8
\$ 259,000	Montezuma County - all	\$ 325,000	\$ 63,282	53%	382
\$ 220,000	Cortez	\$ 255,750	\$ 51,289	61%	284
\$ 319,000	Dolores	\$ 379,000	\$ 72,633	54%	69
\$ 352,700	Mancos	\$ 406,000	\$ 77,309	77%	84
\$ 300,000	San Juan County - all	\$ 402,000	\$ 76,616	70%	26
	Silverton	\$ 399,000	\$ 76,097	76%	19

¹ Purchase Price based on median home prices (Single Family) through November 2021 - MLS/CREN

² Qualifying Annual Income courtesy of The Homes Fund Serving SW Colorado (30% Debt to Income Ratio)

³ Based on estimates of Family Household Income from the 2019 American Community Survey (Census Table S1901)

⁴ Purchase Price based on median home prices (Single Family) through November 2020 - MLS.

When we compare housing costs to the salaries of essential workers such as teachers, we see that the income needed to purchase a home is out of reach. The provision of workforce housing is a critical issue in every community in the region.

¹ Avg Teacher Salary 2020 - 2021		² Median Home Price	³ Annual Income Needed
ARCHULETA COUNTY 50 JT	\$ 50,119	\$ 555,200	\$ 103,146
DOLORES COUNTY RE NO.2	\$ 37,787	\$ 262,500	\$ 52,458
DURANGO 9-R	\$ 49,187	\$ 650,000	\$ 119,563
BAYFIELD 10 JT-R	\$ 48,734	\$ 399,000	\$ 76,097
IGNACIO 11 JT	\$ 42,473	\$ 237,000	\$ 48,042
MONTEZUMA-CORTEZ RE-1	\$ 40,054	\$ 255,750	\$ 63,282
DOLORES RE-4A	\$ 41,006	\$ 379,000	\$ 72,633
MANCOS RE-6	\$ 40,245	\$ 406,000	\$ 77,309
SILVERTON 1	\$ 40,096	\$ 399,000	\$ 76,097
SAN JUAN BOCES	\$ 62,139		
REGION 9	\$ 45,184		
STATE	\$ 58,219		

¹ <https://www.cde.state.co.us/cdereval/staffcurrent>

² Purchase Price based on median home prices through November 2021 (MLS).

³ Courtesy of the Homes Fund serving SW Colorado

Detailed housing data is available in separate reports located on the Region 9 website www.region9edd.org.

These include housing needs assessments, 2nd homeowner studies, and housing issues as they pertain to economic stability.

THE SOUTHERN UTE INDIAN TRIBE



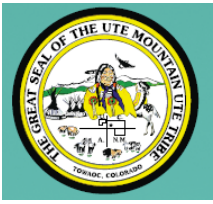
The Southern Ute Tribal enrollment is currently about 1,500, with most of the members living on the reservation. The present-day Southern Ute Reservation forms a rectangle seventy-five miles east to west by 15 miles north to south and is slightly more than 681,000 acres in total area. Often referred to as a "checkerboard" for its irregular pattern of land ownership, the reservation lands are divided among many interests, including primarily Tribal trust lands, allotted trust lands, U.S. Forest Service and Bureau of Reclamation lands, and fee simple lands. Much of the Tribe's lands, with the exception of the Pine River Valley, are rugged, upland and foothill areas, while non-Indian fee lands occur on the arable mesas within the reservation. U.S. Forest Service lands are those of the San Juan National Forest, while Reclamation lands are those immediately surrounding Navajo Reservoir.

The Tribe is the largest employer in La Plata County, CO. Tribal government and other enterprises currently employ about 1,500 people. The Tribe's economic success comes from its land, mineral estate (the Tribe's Reservation straddles the northern third of the San Juan Basin – underlain by gas bearing geological formations including coalbeds), the extraordinary vision of its leaders, and to the efforts and achievements of its employees. Early efforts to develop minerals under the supervision of the Bureau of Indian Affairs provided moderate economic benefits to the Tribe. However, beginning in the 1980s, the Tribe assumed an active role in managing its own resources. The Tribe created its own Department of Energy to audit and manage the royalty and severance taxes paid by other operators within the reservation. In 1992 the Tribe started its own exploration and production company – Red Willow Production Company and later, its own midstream company – Red Cedar Gathering Company (a joint venture with Kinder Morgan). In the late 1990's, the Tribe estimated that on-reservation gas production would peak within the next decade and determined that other sources of revenue were necessary to sustain the Tribe's future. Actual production in the San Juan Basin peaked in 2004.

In 1999, the Tribe adopted a Financial Plan that was unique in Indian Country. The plan separated the government functions of the Tribe (a quasi-sovereign nation) from the business functions. The governmental division was named the Permanent Fund and was set up to receive a portion of the royalties and severance taxes to fund an endowment to operate off of interest earned on the endowment. The Growth Fund was formed in 2000 to operate Tribal for-profit businesses both on and off the Reservation. It is a substantial, but quiet, economic driver for southwest Colorado serving the membership of the Southern Ute Indian Tribe. The Growth Fund is charged with managing SUIT businesses effectively, building new businesses prudently, paying dividends and elder's pensions while reinvesting money to grow the businesses to provide for future prosperity for the Tribal Membership. The Growth Fund started small but has grown over the last 20 years, with holdings and/or operations in ten states and the Gulf of Mexico. The Growth Fund now consists of companies operating in oil and gas exploration and production on the Reservation, in the Permian Basin, Powder River Basin and deep water Gulf of Mexico (Red Willow Production Company); gas gathering on reservation (Red Cedar Gathering Company) and gas gathering and treating off-reservation (Aka Energy); real estate investment in hotel, apartments, industrial buildings, office buildings and horizontal and vertical development (GF Properties Group); and private equity fund investment (GF Private Equity Group).

Enterprises include the Sky Ute Casino Resort opened in 2008. It offers casino gaming, as well as other family amenities and entertainment. In addition, the resort offers full convention and banquet facilities and can host many mid-size conferences (500 +). The concert venue can seat 1,350 and offers various genre of musical talent. The Casino/Resort has a portion of its net gaming proceeds used to fund the Tribe's governmental operations. While purchasing requirements are so large that local vendors cannot compete, the Casino Resort uses local vendors to the greatest extent possible for such needs as printing & advertising, equipment rental, cleaning services, electrical needs, and vehicle purchases. The Casino Resort's impact on the surrounding community is often under-estimated. As the region's only sizeable conference center the property can attract events to the area that would otherwise have to find accommodations outside of the region. The Tribe has prepared a Comprehensive Economic Development Strategy (CEDS 2018 – 2022) providing a roadmap that will diversify and strengthen the Tribal and regional economy. **More information regarding the SUIT can be found at <https://www.southernute-nsn.gov/> and https://www.colorado.edu/business/sites/default/files/attached-files/2022_cbeo_book_final_lr_1206.pdf.**

THE UTE MOUNTAIN UTE TRIBE



Today, the homelands for the Weeminuche, or Ute Mountain Ute Tribe (UMUT), are slightly less than 600,000 acres. The Tribal lands are on what is known as the Colorado Plateau, a high desert area with deep canyons carved through the mesas. The Ute Mountain Ute Tribe is headquartered in Towaoc, Colorado and White Mesa, Utah in an area known as the Four Corners Region, where the states of Arizona, Colorado, New Mexico, and Utah come together. Towaoc is southwest of Mesa Verde National Park and northeast of scenic Monument Valley.

In addition to the land in Colorado and New Mexico, the Ute Mountain Ute Tribe also has a presence in southeastern Utah, on allotted trust land. These lands, or allotments, cover 2,597 acres and are located at Allen Canyon and the greater Cottonwood Wash area as well as on White Mesa and in Cross Canyon. Some of the allotments in White Mesa and Allen Canyon are individually owned and some are owned by the Tribe as a whole. The Tribe also holds fee patent title to 41,112 acres of land in Utah and Colorado.

The Ute Mountain Ute Tribe has an enrolled membership of about 2,100. The majority (969) of UMUT Tribal members live on the Reservation in Towaoc, with a smaller population (242) in the White Mesa community. The remaining members live off the Reservation. This is a harsh, isolated land, with no nearby cities to provide specialty healthcare or other services for the residents. For residents of Towaoc, the nearest city with a population of more than 50,000 is more than 175 miles away. For those in White Mesa, the nearest city with a population of 50,000 or more is about 200 miles away.

Tribal lands also include the Ute Mountain Tribal Park, which covers 125,000 acres of land along the Mancos River. Hundreds of surface sites, cliff dwellings, petroglyphs and wall paintings of Ancestral Puebloan and Ute cultures are preserved in the park. Native American Ute tour guides provide background information about the people, culture and history who lived in the park lands. National Geographic Traveler chose it as one of "80 World Destinations for Travel in the 21st Century," one of only nine places selected in the United States.

The Ute Mountain Ute Tribe is a major contributor to the regional economy. In 2019, the Tribe was one of the largest employers in Montezuma County with ~1,300 jobs in all aspects of tribal government and operations, and at their Ute Mountain Casino and RV Park. The Colorado Ute Water Settlement Act of 1988 mandated, through the building of the Dolores Project and McPhee Reservoir, that drinking, and irrigation water be provided to the reservation. This has dramatically expanded farming and ranching operations. Other tribal resources include income from oil and gas wells, and tribal enterprises that revolve around tourism such as the Tribe's Ute Mountain Ute Tribal Park and the Ute Mountain Indian Trading Company & Gallery. The Tribe has prepared a Comprehensive Economic Development Strategy (CEDS 2019 – 2024) detailing its strategic roadmap for success.

Culture and language preservation have been at the heart of many of the tribe's recent programs. They have produced award winning intergenerational films. Last year the UMUT won 21 Telly Awards for its film called **OUR CULTURE IS OUR STRENGTH**, aimed to prevent substance abuse and teen suicide. This year an equally promising film was produced called **WE ARE NUCHU**, which will also be nominated for multiple Telly Awards. The films can be viewed at: **Our Culture is Our Strength** <https://vimeo.com/521216390>
We Are Nuchu Short Film <https://vimeo.com/617401273/6cb4761591>

The Kwiyaagat Community Academy (KCA) is a community led school that will connect Elders with the students. The school environment will be surrounded by Nuchiu (Ute) culture and language to build a strong foundation through self-identity to achieve success <https://utekca.org/>.

More information regarding the UMUT can be found at <https://www.utemountainutetribes.com/> and https://www.colorado.edu/business/sites/default/files/attached-files/2022_cbeo_book_final_lr_1206.pdf

ARCHULETA COUNTY

Archuleta County developed as a combination of natural resources and natural attributes (i.e., geothermal hot springs located in Pagosa Springs). Initially these resources were "traditional west" commodities such as timber, cattle and minerals. Since the 1970's Archuleta County has been in transition from a traditional rural community to a more urban environment in which tourism is the number one industry.

Population

	2010	2020	Ann. Avg % Change 2010-20
Archuleta	12,060	13,367	1.0%
Pagosa Springs	1,722	1,577	-0.9%
Unincorporated	10,338	11,790	1.3%

Source: Colorado State Demography Office

reflect the large number of seasonal visitors, many of whom own second homes in the area. In 2015, it was estimated that 41% of residential housing was owned by people whose primary residence was outside of the county.

From 2000 to 2010, the population of Archuleta County grew by 2% annually. Since 2010, the estimated annual rate of growth has slowed to about 1%. The State Demographer estimates an increase of about 1,907 residents in the next 10 years (2030). These population figures do not

Archuleta County 2020 Total Employment	# of Jobs	% of Jobs	*Avg. ann. wage	# Jobs % Change 2019-2020
Agriculture	361	5%	\$ 43,450	4%
Mining	40	0.6%	\$ 42,462	-2%
Utilities	28	0.4%	\$ 103,559	-3%
Construction	775	12%	\$ 40,587	-2%
Manufacturing	119	2%	\$ 34,145	-3%
Wholesale Trade	43	1%	\$ 84,596	-10%
Retail Trade	901	14%	\$ 29,454	3%
Transportation & Warehousing	62	1%	\$ 45,336	13%
Information	42	1%	\$ 55,719	-7%
Finance Activities	143	2%	\$ 59,754	3%
Real Estate	446	7%	\$ 41,482	-3%
Professional & Business Services	398	6%	\$ 74,421	-5%
Management of Companies & Enterprises	16	0.2%	\$ 94,513	14%
Administration & Waste Management	286	4%	\$ 27,581	-13%
Private Education	84	1%	\$ 16,161	15%
Health Services	515	8%	\$ 34,503	-4%
Arts, Entertainment, & Recreation	140	2%	\$ 19,648	-10%
Accommodation & Food	798	12%	\$ 24,335	-6%
Other Services, except Public Administration	498	7%	\$ 34,290	-10%
Government	969	15%	\$ 55,048	1%
Total	6,664	100%	\$39,247	-2%

In 2020, county unemployment rates (7.6%) were higher than the state (7.3%), but lower than the nation (6.7%). This table includes wage earners as well as proprietors (owners). About 68% of total employment is by wage earners, while 32% is through proprietors. The service sector (the 8 highlighted fields) employs about 40% of workers in the county. The service sector is composed of many types of jobs, and varying wage scales, ranging from highly paid professionals to entry-level wage earners.

*Quarterly Census of Employment & Wages (QCEW)

Source: Colorado State Demography Office

2020 Employment Share by Wage - 6,664 Jobs

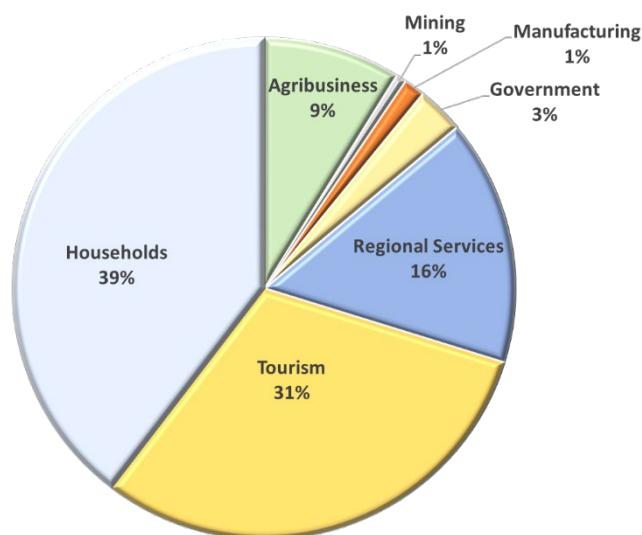
Avg. Annual Wage	Low Wage	Mid Wage	High Wage	Livable Wage
\$39,247	< \$31,398	\$31,399 - \$47,096	> \$47,096	TBD
	33%	42%	25%	

The county average annual wage (\$39,247) is 59% of the state average annual wage (\$66,662).

Low Wage < 80% of AAW; Mid Wage > 80% and < 120% of AAW; High Wage > 120% of AAW
Livable Wage for two working adults with two children (MIT)

The U.S. Census Bureau estimates that in 2019 there were 1,488 workers commuting out of the county for work. In contrast, 1,221 people were commuting in for work. These estimates only reflect those jobs covered by unemployment insurance.

Archuleta County Base Analysis



Of the total number of jobs (6,664), 73% are in **base industries** (4,860) jobs. Base analysis distinguishes which industries are responsible for overall growth and change. For more information regarding base analysis please refer to the **Glossary**.

In Archuleta, the largest base employment industries are tourism and households that spend money earned elsewhere (i.e., second homeowners and retirees).

Top employers are ranked based on the numbers of people that they employ. These numbers were collected from each employer if available, estimated based on information collected from past years, or provided by state agencies. Employers include local governments as well as private employers.

Top Employers - Archuleta County 2019	# of Jobs
Upper San Juan Hospital District	280
Archuleta County School Dist. 50 JT	210
Walmart	148
USDA Forest Service	138
Archuleta County	132
Visting Angels of the Southwest	122
City Market	118
Wyndam Pagosa	73
Springs Resort LTD	54
Pine Ridge Extended Care Center LLC	53

Archuleta Total Personal Income	2019 TPI (\$000)	% of Total	2020 TPI (\$000)	% of Total
Employment Earnings	\$ 266,322	44%	\$ 276,963	42%
Residency Adjustment	\$ 2,274	0.4%	\$ 1,379	0.2%
Dividends, Interest & Rent	\$ 188,883	31%	\$ 180,776	27%
Transfer Payments	\$ 149,273	25%	\$ 199,355	30%
Estimated TPI	\$ 606,752	100%	\$ 658,473	100%

Total Personal Income (TPI) is the sum of all income paid to residents of Archuleta County from various sources. Retirees (60+) brought in \$108 million (16%) of TPI through transfer payments.

Source: Bureau of Economic Analysis

Per Capita Income (PCI) of Archuleta County is 78% of the National PCI and 73% of Colorado's PCI.

	PCI 2019	PCI 2020	% of USA	% of CO
USA	\$ 56,490	\$ 59,510	100%	93%
Colorado	\$ 61,157	\$ 63,776	107%	100%
Archuleta	\$ 43,088	\$ 46,287	78%	73%

Source: Bureau of Economic Analysis

Enterprise Zones – Region 9 administers the Southwest Colorado Enterprise Zone program. The county as a whole is not an enterprise zone, though eligible areas have an Enhanced Zone status through 2022, based on employment and income criteria. The county has two ineligible census blocks, 9743003 bisects the Town of Pagosa Springs; with the north half included in the EZ (9744002), and the south half of the town generally excluded. Southern Ute Tribal lands are included in the eligible census block 9404001. <https://www.region9edd.org/enterprise-zone>

Opportunity Zones – The County has one designated census tract, 9744, which includes the northern portion of the Town of Pagosa Springs and a large part of the eastern side of the county. <https://www.region9edd.org/opportunity-zones>

More detailed information regarding Archuleta County is available at www.region9edd.org under regional data.

DOLORES COUNTY

The population of Dolores County is dispersed within two topographically distinct areas. Dove Creek, the county seat, is primarily within an agricultural area located on the west-side of the county. It was built on the production of dry land crops, enhanced by the introduction of irrigation from McPhee Reservoir. From 2010 to 2020 Dove Creek's population declined an average of -1.4% annually.

The mountainous (eastern) part of Dolores County historically supplied a number of small sawmills and was the site of gold, silver, copper, lead, zinc and molybdenum mining in the Rico area. Rico, located on the eastside of the county, increased an average of 0.1% annually from 2010 to 2020. Unincorporated areas within the county are relatively stable. The State Demographer estimates a decrease of about 86 residents in the county in the next 10 years (2030).

	2010	2020	Ann. Avg % Change 2010-20
Dolores	2,060	2,080	0.1%
Dove Creek	734	636	-1.4%
Rico	264	291	1.0%
Unincorporated	1,062	1,153	0.8%

Source: Colorado State Demography Office

From 2000 to 2010, the population of Dolores County grew by 1.1% annually. From 2010 to 2020 the average annual rate of growth decreased to 0.1%.

Dolores County 2020 Total Employment	# of Jobs	% of Jobs	*Avg. ann. wage
Agriculture	224	25%	\$ 32,147
Mining	15	2%	\$ 53,470
Construction	37	4%	\$ 44,420
Manufacturing	31	3%	ND
Retail Trade	71	8%	\$ 27,548
Transportation & Warehousing	28	3%	ND
Administration & Waste Management	29	3%	\$ 47,608
Accommodation & Food	75	8%	ND
Government	228	25%	ND
Sectors Not Disclosed (ND)	169	19%	
Total	907	81%	\$ 49,615

ND = Not Disclosed. *Quarterly Census of Employment & Wages (QCEW)

Source: Colorado State Demography Office

Jobs % Change 2019-2020
0%
-32%
-8%
-3%
-1%
-18%
-12%
17%
-7%
8%
-1%

In 2020, county unemployment rates (6.9%) were lower than the state (7.3%) and higher than the nation (6.7%). About 65% of total employment is by wage earners, while 35% is through proprietors (owners). Government was a very strong employment sector, accounting for 25% of jobs (average wage shown is for federal government jobs only, others are not disclosed).

The service sector (the 2 highlighted fields) is composed of many types of jobs, and very different wage scales. These include highly paid professionals, as well as entry-level wage earners. Confidentiality concerns related to the small numbers in this county limit the publicly available information about jobs and income in many sectors. **If 80% or more of the employment in an industry is in one firm, or if there are three firms or less in an industry, then the data cannot be disclosed per state statute.**

2020 Employment Share by Wage - 907 Jobs

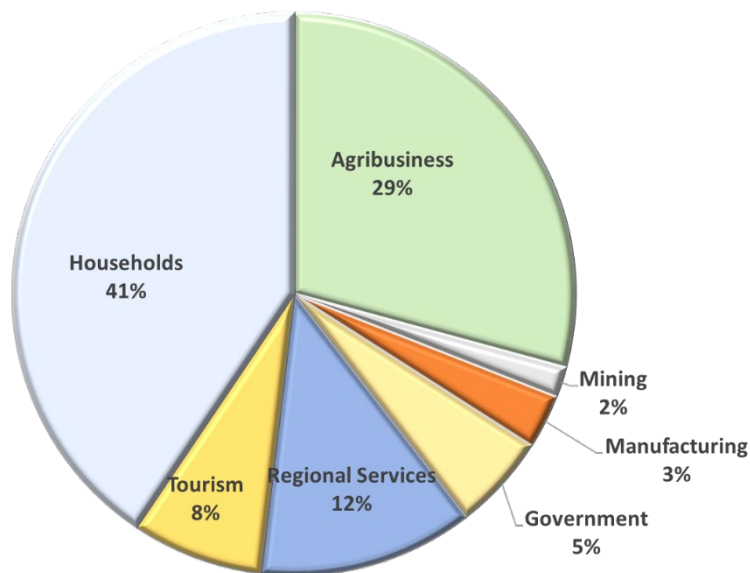
Avg. Annual Wage	Low Wage	Mid Wage	High Wage	Livable Wage
\$49,173	< \$39,338	\$39,339 - \$59,008	>\$59008	TBD
	NA	NA	NA	NA

The county average annual wage (\$49,173) is 74% of the state average annual wage (\$66,662).

Low Wage < 80% of AAW; Mid Wage > 80% and < 120% of AAW; High Wage > 120% of AAW
Livable Wage for two working adults with two children (MIT)

The U.S. Census Bureau estimates that in 2019 there were 389 wage and salary workers commuting out of the county for work. In contrast, 238 people were commuting in for work. These estimates only reflect those jobs covered by unemployment insurance. <https://onthemap.ces.census.gov/>.

Dolores County Base Analysis



Of the total number of jobs (907), 96% (873 jobs) are in **base industries**. Base analysis distinguishes which industries are responsible for overall growth and change. For more information regarding base analysis please refer to the **Glossary**.

In Dolores, the largest base employment industries are agribusiness and households that spend money earned elsewhere (i.e., second homeowners and retirees).

Top employers are ranked based on the numbers of people that they employ. These numbers were collected from each employer if available, estimated based on information collected from past years, or provided by state agencies. Employers include local governments as well as private employers. Only employers with more than 10 employees were included here.

Top Employers - Dolores County 2019	# of Jobs
Dolores County	86
Dolores County School Dist. RE2J	46
Dunton Hot Springs	38
Dove Creek Integrated Health Care	32
Dove Creek Superette	25
Air Products Helium	15
MVCI Energy Services LLC	14
Doves Nest Early Care & Education	13
Dove Creek Implement	12

Dolores Total Personal Income	2019 TPI (\$000)	% of Total	2020 TPI (\$000)	% of Total
Employment Earnings	\$ 37,738	43%	\$ 43,531	47%
Residency Adjustment	\$ 9,502	11%	\$ 4,788	5%
Dividends, Interest & Rent	\$ 17,767	20%	\$ 16,020	17%
Transfer Payments	\$ 22,596	26%	\$ 28,675	31%
Estimated TPI	\$ 87,603	100%	\$ 93,014	100%

Total Personal Income (TPI) is the sum of all income paid to residents of Dolores County from various sources. Retirees (60+) brought in more than \$15.1 million (16%) of TPI through transfer payments in 2020.

Source: Bureau of Economic Analysis

Per Capita Income (PCI) of Dolores County is 71% of the National PCI and 66% of Colorado's PCI in 2020.

	PCI 2019	PCI 2020	% of USA	% of CO
USA	\$ 56,490	\$ 59,510	100%	93%
Colorado	\$ 61,157	\$ 63,776	107%	100%
Dolores	\$ 38,005	\$ 42,093	71%	66%

Source: Bureau of Economic Analysis

Enterprise Zones – Region 9 administers the Southwest Colorado Enterprise Zone. All of Dolores County is a designated Enterprise Zone and is currently listed as an Enhanced Enterprise Zone based on employment and income criteria through 2022. <https://www.region9edd.org/enterprise-zone>

Opportunity Zones – All of Dolores County is a designated Opportunity Zone. <https://www.region9edd.org/opportunity-zones>

More detailed information regarding Dolores County is available at www.region9edd.org under regional data.

LA PLATA COUNTY

Historically, La Plata County developed as a result of "traditional west" commodities such as minerals, cattle and timber. Since the 1970's La Plata County has been in transition from a traditional rural county to a more urban environment in which tourism is the number one industry. People moving in for quality-of-life issues or "amenity migration" drove population growth in the 1990's, a trend continuing today.

Population

	2010	2020	Ann. Avg % Change 2010-20
La Plata	51,441	55,651	0.8%
Bayfield	2,357	2,839	1.9%
Durango	16,901	19,078	1.2%
Ignacio	699	852	2.0%
Unincorporated	31,484	32,882	0.4%

Source: Colorado State Demography Office

whom own second homes in the county. The State Demographer estimates an increase of about 9,400 residents in the county in the next 10 years.

Between 2010 and 2020, La Plata County grew 0.8% annually, with most of the growth occurring in Bayfield and Ignacio. Durango saw slower growth, as did unincorporated areas of the county, including the Southern Ute Indian Tribe, headquartered near Ignacio. More information about the Southern Ute Tribe is on page 8 of this report. These population figures do not reflect the large number of seasonal visitors, many of

La Plata County 2020 Total Employment	# of Jobs	% of Jobs	*Avg. ann. wage	# Jobs % Change 2019-2020
Agriculture	961	3%	\$ 33,862	-0.2%
Mining	540	2%	\$ 139,660	2%
Utilities	143	0.4%	\$ 84,874	2%
Construction	2,917	9%	\$ 55,082	-10%
Manufacturing	800	2%	\$ 47,497	-4%
Wholesale Trade	661	2%	\$ 59,643	1%
Retail Trade	3,678	11%	\$ 34,426	-2%
Transportation & Warehousing	770	2%	\$ 64,518	-10%
Information	445	1%	\$ 92,402	-4%
Finance Activities	949	3%	\$ 110,871	-5%
Real Estate	1,416	4%	\$ 48,377	-1%
Professional & Business Services	2,315	7%	\$ 71,406	-2%
Management of Companies & Enterprises	146	0.4%	\$ 107,000	8%
Administration & Waste Management	1,336	4%	\$ 36,744	-6%
Private Education	549	2%	\$ 47,500	-4%
Health Services	3,858	12%	\$ 54,422	-3%
Arts, Entertainment, & Recreation	1,230	4%	\$ 23,642	-15%
Accommodation & Food	2,906	9%	\$ 22,935	-18%
Other Services, except Public Administration	1,544	5%	\$ 35,687	-6%
Government	5,771	18%	\$ 61,406	-5%
Total	32,935	100%	\$ 51,404	-6%

*Quarterly Census of Employment & Wages (QCEW)

Source: Colorado State Demography Office

In 2020, county unemployment rates (6.8%) were lower than the state (7.3%) but higher than the nation (6.7%).

This table includes wage earners as well as proprietors (owners). About 78% of total employment is by wage earners, while 22% is through proprietors. The service sector (including all 8 highlighted fields) employs about 47% of workers in the county. The service sector is composed of many types of jobs, and very different wage scales. Many of the service jobs in La Plata County are technical, educational or in health services.

2020 Employment Share by Wage - 32,935 Jobs

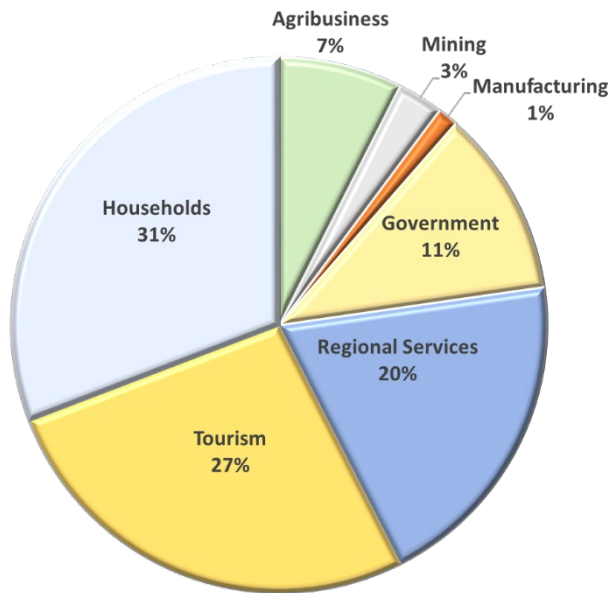
Avg. Annual Wage	Low Wage	Mid Wage	High Wage	Livable Wage
\$51,404	< \$41,123	\$41,124 - \$61,685	> \$61,685	TBD
	35%	48%	16%	

Low Wage < 80% of AAW; Mid Wage > 80% and < 120% of AAW; High Wage > 120% of AAW
Livable Wage for two working adults with two children (MIT)

The county average annual wage (\$51,404) is 77% of the state average annual wage (\$66,662).

The U.S. Census Bureau estimates that in 2019 there were 5,709 wage and salary workers commuting out of the county for work. In contrast, 6,838 people were commuting in for work. These estimates only reflect those jobs covered by unemployment insurance <https://onthemap.ces.census.gov/>.

La Plata County Base Analysis



Of the total number of jobs (32,935), 64% (21,099 jobs) are in **base industries**. Base analysis distinguishes which industries are responsible for overall growth and change. For more information regarding base analysis please refer to the **Glossary**.

In La Plata, the largest base employment industries are tourism and households that spend money earned elsewhere (i.e., retirees).

Top employers are ranked based on the numbers of people that they employ. These numbers were collected from each employer if available, estimated based on information collected from past years, or provided by state agencies. Employers include local governments as well as private employers.

Top Employers - La Plata County 2020	# of Jobs
Southern Ute Indian Tribe	1,416
Mercy Regional Medical Center	756
Purgatory Recreation Management LLC	136
Durango School Dist. 9R	943
Fort Lewis College	673
La Plata County	422
Bayfield School District #10	226
City of Durango	328
Walmart	338
Rocky Mountain Chocolate Factory	190

verified

La Plata Total Personal Income	2019 TPI (\$000)	% of Total	2020 TPI (\$000)	% of Total
Employment Earnings	\$ 1,732,488	53%	\$ 1,741,680	51%
Residency Adjustment	\$ (32,296)	-1%	\$ (37,350)	-1%
Dividends, Interest & Rent	\$ 1,096,833	34%	\$ 1,100,576	32%
Transfer Payments	\$ 443,623	14%	\$ 625,344	18%
Estimated TPI	\$ 3,240,648	100%	\$ 3,430,250	100%

Source: Bureau of Economic Analysis

Total Personal Income (TPI) is the sum of all income paid to residents of La Plata County from various sources. Retirees (60+) brought in \$302 million (9%) of TPI through transfer payments. **A negative residency adjustment means that more people are commuting into the county for employment than are commuting out.**

Per Capita Income (PCI) of La Plata County is 103% of the National PCI and is 96% of Colorado's PCI.

	PCI 2019	PCI 2020	% of USA	% of CO
USA	\$ 56,490	\$ 59,510	100%	93%
Colorado	\$ 61,157	\$ 63,776	107%	100%
La Plata	\$ 58,216	\$ 61,304	103%	96%

Enterprise Zones – Nineteen of the 33 census blocks in the county are designated enterprise zones.

<https://www.region9edd.org/enterprise-zone>

Opportunity Zones – Census Tracts 9404 and 9711 are eligible in La Plata County.

<https://www.region9edd.org/opportunity-zones>

More detailed information regarding La Plata County is available at www.region9edd.org under regional data.

MONTEZUMA COUNTY

Historically, Montezuma County developed as a result of providing mining towns in the San Juan Mountains with supplies. By the turn of the 20th century the mining boom had played out and the remaining settlers turned to subsistence agriculture and the export of agricultural and timber products. In the 1980's, the construction of McPhee Reservoir (the Dolores Project) and its extensive irrigation systems allowed increased agricultural production and enhanced recreational opportunities for locals and tourists. More recently, Montezuma County and local communities have been exploring increasing the telecommunications infrastructure and further securing water resources.

Population

	2010	2020	Ann. Avg % Change 2010-20
Montezuma	25,532	25,853	0.1%
Cortez	8,481	8,762	0.3%
Dolores	936	885	-0.6%
Mancos	1,337	1,196	-1.1%
Unincorporated	14,775	15,010	0.2%

Source: Colorado State Demography Office

Between 2010 and 2020, Montezuma County grew 0.1% annually with most of the growth occurring in Cortez (0.3%). Unincorporated areas of the county include the Ute Mountain Ute Indian Tribe, headquartered in Towaoc, which is located 12 miles southwest of Cortez. More information about the Tribe is on page 8 of this report. The State Demographer estimates an increase of about 1,800 residents in the county in the next 10 years.

Montezuma County 2020 Total Employment	# of Jobs	% of Jobs	*Avg. ann. wage	# Jobs % Change 2019-2020
Agriculture	1,063	9%	\$ 39,508	-0.2%
Mining	111	1%	\$ 61,705	2%
Utilities	85	0.7%	\$ 82,314	2%
Construction	753	6%	\$ 41,443	-10%
Manufacturing	401	3%	\$ 38,676	-4%
Wholesale Trade	248	2%	\$ 59,058	1%
Retail Trade	1,587	13%	\$ 33,401	-2%
Transportation & Warehousing	319	3%	\$ 41,387	-10%
Information	82	0.7%	\$ 57,771	-4%
Finance Activities	223	2%	\$ 55,265	-5%
Real Estate	326	3%	\$ 39,393	-1%
Professional & Business Services	516	4%	\$ 60,169	-2%
Management of Companies & Enterprises	46	0.4%	\$ 98,026	8%
Administration & Waste Management	295	2%	\$ 28,855	-6%
Private Education	210	2%	\$ 34,300	-4%
Health Services	1,733	14%	\$ 39,562	-3%
Arts, Entertainment, & Recreation	129	1%	\$ 10,475	-15%
Accommodation & Food	944	8%	\$ 19,966	-18%
Other Services, except Public Administration	752	6%	\$ 26,996	-6%
Government	2,573	21%	\$ 53,164	-5%
Total	12,396	100%	\$ 39,804	-6%

In 2020, county unemployment rates (7.1%) were lower than the state (7.3%) and higher than the nation (6.7%). This table includes wage earners as well as proprietors (owners). About 77% of total employment is by wage earners, while 23% is through proprietors. The service sector (including all 8 of the highlighted fields) employs about 37% of workers in the county. Many of the service jobs in Montezuma County support accommodation and food services and health and social assistance.

*Quarterly Census of Employment & Wages (QCEW)

Source: Colorado State Demography Office

2020 Employment Share by Wage - 12,396 Jobs

Avg. Annual Wage	Low Wage	Mid Wage	High Wage	Livable Wage
\$39,804	< \$31,843	\$31,844 - \$44,765	> \$44,766	TBD
	17%	52%	31%	

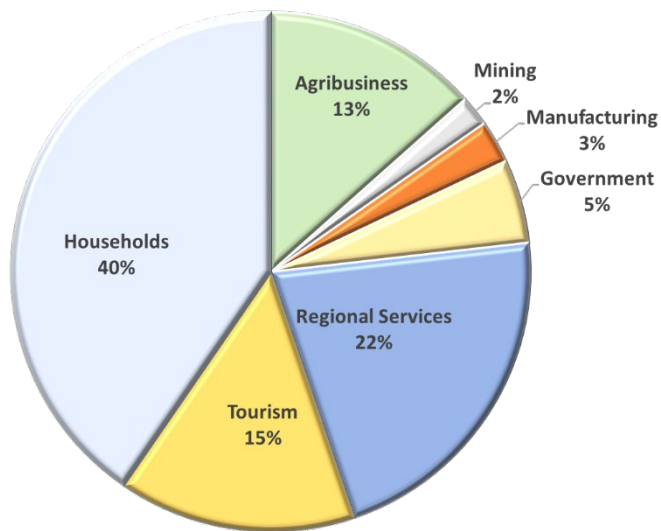
The county average annual wage (\$39,804) is 60% of the state average annual wage (\$66,662).

Low Wage < 80% of AAW; Mid Wage > 80% and < 120% of AAW; High Wage > 120% of AAW

Livable Wage for two working adults with two children (MIT)

The U.S. Census Bureau estimates that in 2019 there were 3,707 wage and salary workers commuting out of the county for work. There were 2,263 people commuting into the county for work. These estimates only reflect those jobs covered by unemployment insurance. <https://onthemap.ces.census.gov/>

Montezuma County Base Analysis



Of the total number of jobs (12,396), 74% (9,183 jobs) are in **base industries**. Base analysis distinguishes which industries are responsible for overall growth and change. For more information regarding base analysis please refer to the **Glossary**.

In Montezuma, the largest base employment industries are households (i.e., retirees) that spend money earned elsewhere. Montezuma County has the highest percentage of Regional Services jobs (i.e., construction) of anywhere in the region.

Top Employers - Montezuma County 2019	# of Jobs
Ute Mountain Casino	400
Montezuma Cortez School Dist. RE1	394
Ute Mountain Ute Tribe - Government	357
Southwest Memorial Hospital	352
Walmart	280
Montezuma County	215
Weeminuche Construction Authority	150
Pasco SW Inc	149
City of Cortez	133
City Market	120

Top employers are ranked based on the numbers of people that they employ. These numbers were collected from each employer if available, estimated based on information collected from past years, or provided by state agencies. Employers include local governments as well as private employers.

Montezuma Total Personal Income	2019 TPI (\$000)	% of Total	2020 TPI (\$000)	% of Total
Employment Earnings	\$ 569,383	47%	\$ 595,104	45%
Residency Adjustment	\$ 83,443	7%	\$ 85,059	6%
Dividends, Interest & Rent	\$ 274,585	22%	\$ 257,508	19%
Transfer Payments	\$ 296,090	24%	\$ 386,430	29%
Estimated TPI	\$ 1,223,501	100%	\$ 1,324,101	100%

Total Personal Income (TPI) is the sum of all income paid to residents of Montezuma County from various sources. Retirees (60+) brought in \$183 million (14%) of TPI through transfer payments.

Source: Bureau of Economic Analysis

Per Capita Income (PCI) of Montezuma County is 79% of National PCI and 73% of Colorado's PCI.

	PCI 2019	PCI 2020	% of USA	% of CO
USA	\$ 56,490	\$ 59,510	100%	93%
Colorado	\$ 61,157	\$ 63,776	107%	100%
Montezuma	\$ 43,542	\$ 46,919	79%	74%

Source: Bureau of Economic Analysis

Enterprise Zones – All of Montezuma County is a designated Enhanced Enterprise Zone.

<https://www.region9edd.org/enterprise-zone>

Opportunity Zones – Census tract 9411, which encompasses the Ute Mountain Ute Indian Reservation, is an eligible Opportunity Zone. <https://www.region9edd.org/opportunity-zones>

More detailed information regarding Montezuma County is available at www.region9edd.org under regional data.

SAN JUAN COUNTY

The discovery of gold in the county by Charles Baker in 1860 was followed by a gold rush in the 1870's. With the dedication of the "Million Dollar Highway" in July of 1924 the transportation of gold, silver, lead, copper and zinc began to shift from the narrow-gauge train to trucks using Highway 550, which connects Silverton to Montrose and to Durango. After World War II, the rail line began to carry less freight and more tourists up from Durango to enjoy the spectacular scenery. San Juan County has become almost entirely dependent upon tourism, and are working to diversify their local economy.

Population

	2010	2020	Ann. Avg % Change 2010-20
San Juan	709	707	-0.03%
Silverton	646	624	-0.3%
Unincorporated	63	83	2.8%

Source: Colorado State Demography Office

second homes in the area in order to enjoy the rural amenities of life in the high country. This phenomenon, known as "amenity migration", has produced wide ranging economic impacts on the community. A Housing Needs Assessment was performed for Silverton and San Juan County in the summer of 2021. The report analyzes existing housing data, housing plans, and identifies housing needs. The full report is accessible below:

[San Juan County & Silverton Housing Needs Assessment - August 2021](#)

In 2020, county unemployment rates (6.7%) were lower than the state (7.3%) and on par to the nation (6.7%).

San Juan County 2020 Total Employment	# of Jobs	% of Jobs	*Avg. ann. wage	# Jobs % Change 2019-2020
Construction	21	5%	ND	-16%
Retail Trade	50	12%	\$ 21,015	-6%
Real Estate	20	5%	\$ 33,426	ND
Professional & Business Services	23	6%	ND	-12%
Health Services	27	7%	ND	35%
Arts, Entertainment, & Recreation	36	9%	ND	-12%
Accommodation & Food	84	20%	\$ 28,250	-27%
Other Services, except Public Administration	15	4%	\$ 19,488	-17%
Government	87	21%	\$ 42,164	-2%
Sectors Not Disclosed (ND)	50	12%	ND	-33%
Total	413	100%	\$ 30,663	-11%

This table includes wage earners as well as proprietors (owners). About 78% of total employment is by wage earners, while 22% is through proprietors.

The service sector includes all of the five highlighted fields. Many of the service jobs in San Juan County support tourism, in accommodation (lodging) and food services.

ND = Not Disclosed. *Quarterly Census of Employment & Wages (QCEW)

Source: Colorado State Demography Office

Confidentiality concerns related to the small numbers in this county limit the publicly available information about jobs and income in many sectors. **If 80% or more of the employment in an industry is in one firm, or if there are three firms or less in an industry, then the data cannot be disclosed per state statute.**

2020 Employment Share by Wage - 413 Jobs

Avg. Annual Wage	Low Wage	Mid Wage	High Wage	Livable Wage
\$30,663	< \$24,530	\$24,531 - \$36,795	> \$36,796	TBD
	NA	NA	NA	NA

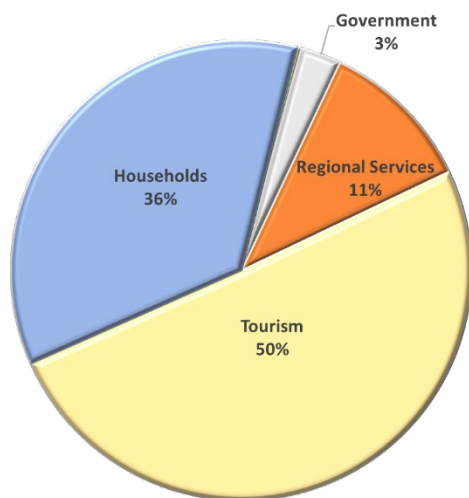
Low Wage < 80% of AAW; Mid Wage > 80% and < 120% of AAW; High Wage > 120% of AAW

Livable Wage for two working adults with two children (MIT)

The county average annual wage (\$30,663) is 46% of the state average annual wage (\$66,662).

The U.S. Census Bureau estimates that in 2019 there were 134 wage and salary workers commuting out of the county for work. In contrast there also 127 people commuting into the county for work. These estimates only reflect those jobs covered by unemployment insurance. <https://onthemap.ces.census.gov/>.

San Juan County Base Analysis



Of the total number of jobs (413), 84% (349 jobs) are in **base industries**. Base analysis distinguishes which industries are responsible for overall growth and change. For more information regarding base analysis please refer to the **Glossary**.

In San Juan, the largest base employment industries are tourism and households that spend money earned elsewhere.

Top employers are ranked based on the numbers of people that they employ. These numbers were collected from each employer if available, estimated based on information collected from past years, or provided by state agencies. Employers include local governments as well as private employers.

Top Employers - San Juan County 2019	# of Jobs
Golden Block Brewery	35
San Juan County	33
Silverton School Dist 1	30
Town of Silverton	20
Pickle Barrel Inc	14
Handlebars	14
Silverton Outdoor Learning and Rec Center	14
AK Cleaning and Staffing	10

>10 employees

San Juan Total Personal Income	2019 TPI (\$000)	% of Total	2020 TPI (\$000)	% of Total
Employment Earnings	\$ 18,678	50%	\$ 20,191	50%
Residency Adjustment	\$ 2,621	7%	\$ 2,585	6%
Dividends, Interest & Rent	\$ 10,153	27%	\$ 8,812	22%
Transfer Payments	\$ 6,064	16%	\$ 8,426	21%
Estimated TPI	\$ 37,516	100%	\$ 40,014	100%

Total Personal Income (TPI) is the sum of all income paid to residents of San Juan County from various sources. Retirees (60+) brought in \$4.4 million (11%) of TPI through transfer payments.

Source: Bureau of Economic Analysis

Per Capita Income (PCI) of San Juan County is 84% of National PCI and 78% of Colorado's PCI.

	PCI 2019	PCI 2020	% of USA	% of CO
USA	\$ 56,490	\$ 59,510	100%	93%
Colorado	\$ 61,157	\$ 63,776	107%	100%
San Juan	\$ 47,933	\$ 50,039	84%	78%

Source: Bureau of Economic Analysis

Enterprise Zones – All of San Juan County has been designated as an Enhanced Enterprise Zone through 2022. <https://www.region9edd.org/enterprise-zone>

Opportunity Zones – All of San Juan County has been designated as an Opportunity Zone. <https://www.region9edd.org/opportunity-zones>

More detailed information regarding San Juan County is available at www.region9edd.org, under regional data.

GLOSSARY OF KEY TERMS

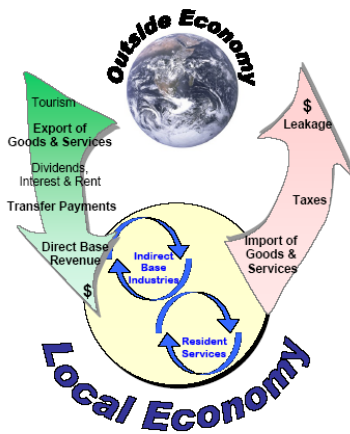
Economic Base Analysis is a tool to describe economic activity by the source of revenue, whether the money generated by sales comes from outside the local economy, or from within the local economy. This type of analysis is designed to define those economic activities that drive or sustain the local economy. Base Analysis distinguishes which industries and factors are responsible for overall growth and change. There are two types of regional industries:

Base industries produce exports or derive their sales or income *directly* from outside sources, or *indirectly* by providing supplies to export industries. These activities **bring in outside dollars** to circulate within the local economy. These industries include agriculture, mining, manufacturing, national and regional services, state and federal government jobs, and tourism. Another base industry is created by households that spend money earned elsewhere. For example, a retiree whose income comes from outside of the county is supporting many traditional local resident services jobs; however, since their income is basic (from outside the local economy), the local resident service jobs are also considered basic.

Local resident services provide services to residents and also **re-circulate dollars** within the local economy. Resident services include industries that take care of the local community, such as health services, education, and employment at the local grocery store. Residential industries are *industries* because they create jobs . . . which, in turn, create demands for worker housing and services.

Outside money enters the local economy through a variety of sources, circulates through the local area, and then leaves the local economy when we purchase goods or services from outside the area, or pay federal and state taxes.

A common confusion with this type of analysis is that it focuses on the source of revenue as opposed to specific industries. Tourism is considered a direct base economic activity because the visitors are bringing their money from the outside economy and spending it in the local economy.



Looking at restaurants for example, when the person buying a meal is from outside the area (a tourist), it is a **direct base economic activity** and when the person is a resident using money earned in the local economy, it is a **local resident service activity**. So, restaurants are both direct based and a local resident service.

The office of the Colorado State Demographer performs various statistical estimates, including actual surveys of businesses (calling the restaurant and asking them for estimates of how much of their sales are to residents versus tourists) to provide a percentage in various sectors of how much of their activity is direct or local resident based.

Amenity Migration is another source of direct base revenue in terms of money coming from the outside economy to buy real estate and construct homes in the local economy.

The term comes from the fact that people migrate to southwest Colorado because of the amenities, i.e., quality of life and environment. Some of these people are second homeowners and some are telecommuters, meaning that they work from home, making use of the Internet, email and the telephone.

Commuter Data

The U.S. Census Bureau provides estimates for the numbers of workers commuting in to, and out of, each of the counties in the region. These estimates only reflect those jobs covered by unemployment insurance. The last update was in 2019. <https://onthemap.ces.census.gov/>

Population - Census data is collected every 10 years (i.e., 2000, 2010) and is considered an actual count of people within a region or county. The years in between are estimates made by the State Demographer. Projections are made using an assumed growth rate to predict future growth. <https://demography.dola.colorado.gov/population/>

Wage thresholds – The average annual wage¹ is drawn from the Quarterly Census of Employment & Wages (QCEW Program): low wage² = 80% or less than the average annual wage; mid wage³ = greater than 80% and less than 120% of the average annual wage; high wage⁴ is greater than 120% of the annual average wage. Livable wage⁵ is provided for a family of four renting a two-bedroom unit.

Total Personal Income is another important tool to understand our local economy. Total personal income (TPI) is divided into four main components. These numbers come from the Bureau of Economic Analysis (BEA).

1. **Employment earnings** are derived from wage and salary employment as well as from business proprietor's income.
2. **Dividends, Interest & Rent** - **Dividend** income is cash and other assets paid to stockholders who are residents of the area. **Interest** income consists of monies received by local residents from money market mutual funds and other sources. **Rental** income consists of the rental of real property, royalties received from patents, copyrights, and from the rights to natural resources paid to local residents.
3. **Transfer payments** consist primarily of retirement and disability benefit payments, medical payments (i.e., Medicare and Medicaid), income maintenance benefits, unemployment insurance, veteran's benefits and payments to local residents.
4. **Residency adjustments** are made when a person is paid for work performed from outside their place of residency, i.e., commuters. Negative numbers indicate that more people are commuting into the county for employment than are commuting out for employment.

When we divide Total Personal Income (TPI) by the number of people in each county we get an estimate of **Per Capita Income (PCI)**. This allows us to compare the per capita income between counties in our region, the state and the nation. <http://www.bea.gov/regional/index.htm>

Total Employment includes estimated employment from wages, salaries and proprietors' income.

Employment by Sector - Employment (jobs) generates most of the earnings in our region, so it is important to look at the types and numbers of jobs in each of our counties. An employment "sector" groups jobs into industries that are alike. This information allows us to see how many people are employed in each sector, comparing the "strength" of that industry in each of our counties.

Unemployment - Labor force statistics allow us to see how many people are in the workforce, and how many are unemployed. We can use information from the Quarterly Census of Employment and Wages (QCEW) to compare unemployment rates at county, state, and national levels. <http://www.colmigateway.com/gsipub/index.asp>

Enterprise Zones – This program provides state income tax credits and other incentives for private enterprise to expand, or new businesses to locate within a state designated EZ area. Learn more about tax credits in Enterprise Zones at <https://oedit.colorado.gov/enterprise-zone-program>.

Opportunity Zones – This economic and community development tax incentive program provides a new impetus for private investors to support designated distressed areas through private equity investments in businesses and real estate ventures. More details regarding the Opportunity Zone can be found at <https://oedit.colorado.gov/colorado-opportunity-zone-program>.