

# REGION 9

*Economic Development District of SW Colorado*



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Top left photo: Kendra Cook Other photos: Cindy Coleman

## ECONOMIC SNAPSHOT 2019

The Region 9 Report is a publication of the Region 9 Economic Development District of Southwest Colorado, Inc., a non-profit community economic development corporation serving Archuleta, Dolores, La Plata, Montezuma, and San Juan Counties, as well as the Southern Ute and Ute Mountain Ute Indian Tribes.

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# Region 9 Economic Snapshot – 2019 Update

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## INTRODUCTION

Founded in 1989, Region 9 Economic Development District of Southwest Colorado, Inc.'s mission is to be a regional leader, working cooperatively with the private and public sectors to enhance economic conditions and improve the region's economic prosperity. As a 501(c)6 non-profit organization serving the counties of Archuleta, Dolores, La Plata, Montezuma and San Juan as well as the Ute Mountain Ute and Southern Ute Indian Tribes, Region 9 is a central point for regional socio-economic data to provide citizens and policymakers access to reliable, unbiased, and timely information. A variety of regional reports are found on our website at [www.scan.org](http://www.scan.org).

### Strategic Planning Services

Region 9 also works with each county to develop and maintain an economic development strategy with an associated action plan. The most recent update to these strategies, known as the **Comprehensive Economic Development Strategy** (CEDS) was released in September of 2016 and is available on the Region 9 website at

<http://www.scan.org/index.php?strategy=yes>. The CEDS document:

- Summarizes the economic conditions of each county in Region 9.
- Identifies viable economic development projects and initiatives.
- Facilitates eligibility for federal and state economic development funding.
- Identifies goals and strategies for implementing economic development projects and initiatives, and
- Recognizes and defines trends.

Region 9 also assists community groups, government and the private sector with special projects and technical support. Our staff can help with facilitation, grant research and coordination with state and federal agencies.

### Business Support

Region 9's Business Loan Fund provides commercial loans within our five-county area to assist small business capital needs. Business technical assistance is made available through a partnership with the **Southwest Colorado Small Business Development Center at Fort Lewis College** ([www.sbdcfortlewis.org](http://www.sbdcfortlewis.org)). The District also partners with the **Southwest Colorado Accelerator Program For Entrepreneurs** (SCAPE) to provide intensive mentoring and capital investment to select emerging businesses ([www.goscape.org](http://www.goscape.org)).

### Tax Credit Support

Region 9 is the Southwest Colorado Enterprise Zone (EZ) Administrator. Businesses located in a state-designated EZ zone can be eligible for up to 10 different tax credits related to business development, including job training, job creation, and vacant building rehabilitation. More information is available on the Region 9 website under Incentives. Portions of the region are also designated as Opportunity Zones.

## 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.*

### Land and Water

The map on the inside cover of this report illustrates Region 9's boundaries, which 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 land is a study in contrast. 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.

### Land Management

Region 9 encompasses Archuleta, Dolores, La Plata, Montezuma and San Juan Counties, as well as the Southern Ute and Ute Mountain Ute Indian Tribes. Public lands make up 45% of the district; 38% are private lands and 17% are tribal lands. Public lands include a variety of nationally and internationally renowned cultural and natural features that support agricultural/natural resource development enterprises, recreation and tourism. 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 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, and in San Juan County in New Mexico; and in satellite ranching operations. The Ute Mountain Utes are the Weeminuche band of Utes, one of the seven original Ute bands that inhabited the entire state of Colorado. Their tribal headquarters is in Towaoc. The Mouache and Caputa bands comprise the **Southern Ute Tribe**, which is headquartered at Ignacio. The Southern Ute Reservation is located in La Plata and Archuleta Counties. Unlike some Indian reservations that are all contained within one boundary, some of the Southern Ute lands are not contiguous. Both Ute Tribes are sovereign nations and operate under tribal administrations. Additional information about the two Ute tribes is located on page 18.

**Notes on Sources** - *The release of county level economic information lags about two years behind the current year, so 2017 is the benchmark year for this report. The Demography Section - Colorado Division of Local Government (CDLG) provided employment and income estimates using 2017 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** are included to provide a better understanding of key terms and concepts used in this report.*

## Population Trends

Average Annual % Change					
	1970-1980	1980-1990	1990-2000	2000-2010	2010-2017
Archuleta	3.0%	3.8%	6.4%	2.0%	1.4%
Dolores	0.1%	-1.0%	2.1%	1.1%	-0.2%
La Plata	3.5%	1.7%	3.1%	1.6%	1.2%
Montezuma	2.5%	1.2%	2.5%	0.7%	0.2%
San Juan	0.0%	-1.1%	-2.8%	2.3%	0.3%
<b>Region 9</b>	<b>2.9%</b>	<b>1.6%</b>	<b>3.2%</b>	<b>1.4%</b>	<b>0.9%</b>

A look at the annual percentage of population change for each county gives an idea of growth trends in Region 9 from 1970 to 2017. The population within the five counties of Region 9 grew at a rate of about 33% from 1990 to 2000, and about 14% between 2000 and 2010, with the most growth in Archuleta County.

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. Most of the communities in the region are starting to see slow growth again.

The regional population grew about 6% between 2010 and 2017, from 91,772 to 97,548. Thirty-four percent of this recent growth was from “natural” change (the net number resulting from comparing births to deaths) and 66% was from migration. While some people move to the region for economic reasons, such as the availability of jobs, others come for quality of life issues, which are strongly influenced by the large amounts of public lands in the region.

	2010	2017	Ann. Avg % Change 2010-17
Archuleta	12,060	13,316	1.4%
Dolores	2,060	2,040	-0.1%
La Plata	51,441	55,619	1.1%
Montezuma	25,532	25,859	0.2%
San Juan	709	714	0.1%
<b>Region 9</b>	<b>91,802</b>	<b>97,548</b>	<b>0.9%</b>

## Livable Wages

In Colorado, the amount needed to be economically self-sufficient varies considerably 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).

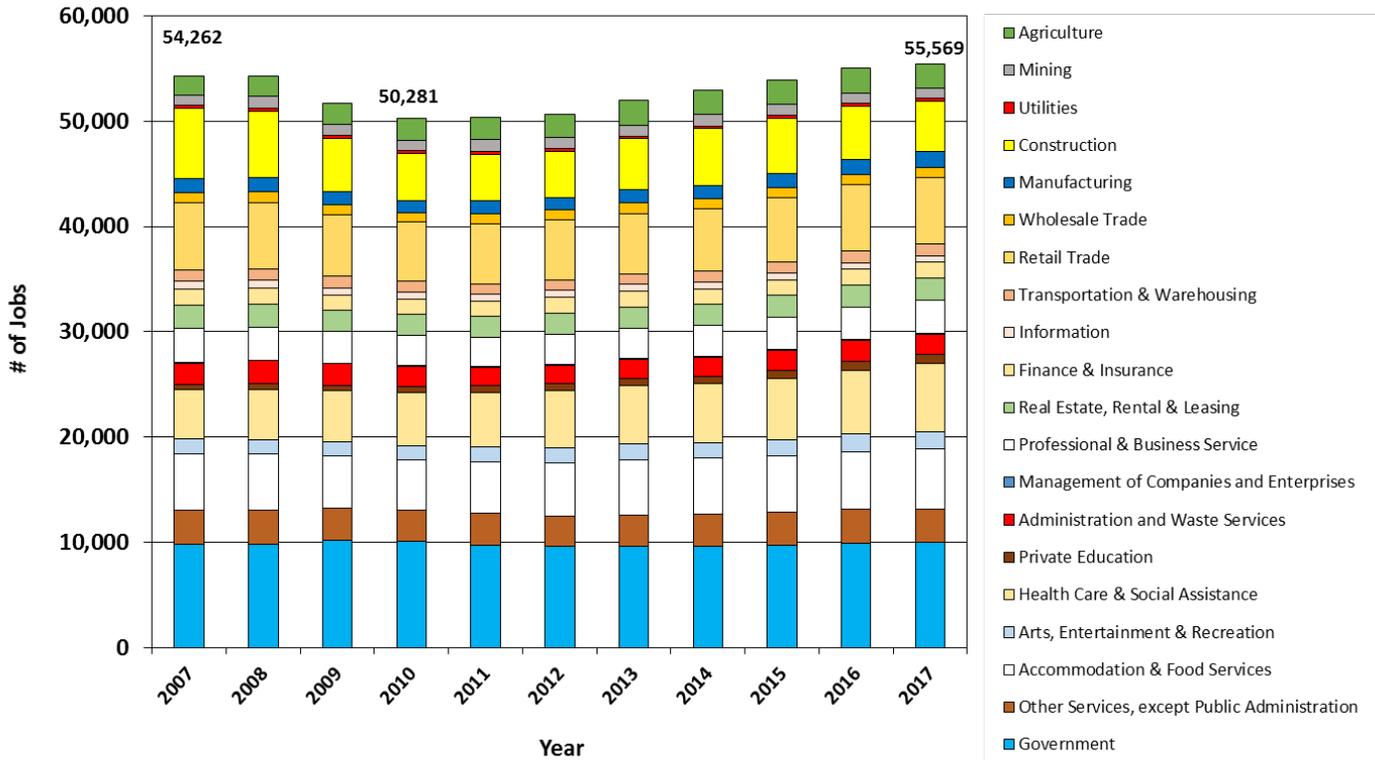
Region 9 - 2018 Livable Hourly Wage by Area	2 Adults + Preschooler + School-age		
	Adult	Adult + Preschooler	
Archuleta County - Pagosa Springs	\$ 12.11	\$ 24.17	\$ 29.29
Dolores County - Rico	\$ 11.69	\$ 18.54	\$ 24.47
Dolores County - Dove Creek	\$ 11.64	\$ 18.07	\$ 23.99
La Plata County - Bayfield	\$ 12.32	\$ 25.50	\$ 31.49
La Plata County - Durango	\$ 13.47	\$ 26.53	\$ 31.74
La Plata County - Ignacio	\$ 11.77	\$ 22.84	\$ 28.05
Montezuma County - Cortez	\$ 10.90	\$ 20.63	\$ 25.71
Montezuma County - Dolores	\$ 10.68	\$ 19.77	\$ 24.85
Montezuma County - Mancos	\$ 11.81	\$ 21.03	\$ 26.11
San Juan County - Silverton	\$ 13.40	\$ 23.83	\$ 29.47

## 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 have stabilized and are exceeding pre-recession levels, as evidenced by a 10% increase in the number of jobs since 2010.

**Region 9 Employment Trends 2007-2017**



Unemployment Rates			
Location	2015	2016	2017
Colorado	3.2%	3.3%	2.8%
Archuleta	4.0%	3.3%	3.0%
Dolores	3.1%	3.9%	3.0%
La Plata	3.5%	2.9%	2.5%
Montezuma	5.6%	5.0%	4.0%
San Juan	4.1%	3.5%	2.2%
USA	5.3%	6.7%	4.4%

Source: Colorado Labor Market CDLE-LMI

In 2015, some counties had higher unemployment rates than the state (3.2%) and nation (5.3%). When we compare these rates to those of 2016 and 2017, we see a positive trend of substantial decreases in unemployment rates in all counties.

## Employment and Income

Region 9 2017 Total Employment	# of Jobs	% of Jobs	*Average Ann. Wage	# Jobs % Change 2015-2017
Agriculture	2,312	4%	\$ 30,320	-1%
Mining	913	2%	\$ 73,835	-14%
Utilities	264	0.5%	\$ 74,470	3%
Construction	4,794	9%	\$ 40,466	-9%
Manufacturing	1,494	3%	\$ 38,036	15%
Wholesale Trade	994	2%	\$ 53,629	0%
Retail Trade	6,300	11%	\$ 25,286	3%
Transportation & Warehousing	1,128	2%	\$ 49,404	6%
Information	606	1%	\$ 47,968	-3%
Finance Activities	1,475	3%	\$ 60,344	2%
Real Estate	2,140	4%	\$ 41,743	3%
Professional & Business Services	3,098	6%	\$ 52,059	2%
Management of Companies and Enterprises	149	0.3%	\$ 90,397	35%
Administration and Waste Management	1,875	3%	\$ 31,051	-1%
Private Education	844	2%	\$ 27,835	13%
Health Services	6,474	12%	\$ 37,961	10%
Arts, Entertainment, and Recreation	1,700	3%	\$ 80,082	11%
Accommodation and Food	5,667	10%	\$ 19,184	6%
Other Services, except Public Administration	3,205	6%	\$ 27,656	2%
Government	9,963	18%	\$ 46,781	3%
Total	55,395	100%	\$ 34,843	3%

\* Average annual wages are from QCEW (Dept. of Labor)

Jobs in this chart include 22% proprietors (owners) as well as 78% wage and salary employees. The service sector (including all of the 8 highlighted fields) provided the highest percentage of jobs (42%) 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 11% 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 (2015-2017) is strongest in the management of companies and enterprises (35%), manufacturing (15%) and education sectors (13%). There have been notable declines in mining (-14%) and construction (-9%) sectors.

Of the total number of jobs, 73% are in **base industries** (40,721 jobs). Base industries are composed of related groups of economic activities. These 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 (25% of jobs) is created by **households** that spend money earned elsewhere (commuters), or at a different point in time (retirees). Royalty payments from oil and gas leases have been important sources of household income in our region. Household income includes money that comes from outside of the local economy, including transfer payments to retirees (such as Medicare), the unemployed and disabled; interest, dividends and rent. 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.

Region 9 Base Industries 2017	# of Jobs	% of Jobs
Agribusiness	3,373	8%
Mining	988	2%
Manufacturing	636	2%
Government	3,100	8%
Regional Services	6,954	17%
Tourism	9,624	24%
Households	10,165	25%
Indirect Unassigned	5,881	14%
Total	40,721	100%

**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** (16% 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.

Region 9 - Percentage of Jobs in Base Industries						
2017	Archuleta	Dolores	La Plata	Montezuma	San Juan	Region 9
Agribusiness	9%	32%	7%	11%	0%	8%
Mining	1%	1%	4%	2%	0%	2%
Manufacturing	1%	2%	1%	3%	1%	2%
Government	2%	6%	10%	5%	4%	8%
Regional Services	10%	21%	16%	18%	14%	17%
Tourism	30%	8%	26%	15%	52%	24%
Households	32%	22%	18%	36%	26%	25%
Indirect Unassigned	15%	8%	17%	9%	3%	14%
Total # jobs	5,145	822	24,836	9,554	364	40,721

Agriculture related services and forestry remain significant sources of employment in Dolores and Montezuma Counties. The Archuleta, La Plata and San Juan County economies are based primarily on tourism.

Specific trends in the base industries, from 2015 to 2017, are presented in the following county sections. More information on jobs in base industries for each county in the region is available at [https://scan.org/uploads/2018\\_Region\\_9\\_Base\\_Industries\\_Analysis.pdf](https://scan.org/uploads/2018_Region_9_Base_Industries_Analysis.pdf)

Region 9 2017 Total Personal Income (\$000)		% of Total
Employment Earnings	\$ 2,507,667	54%
Residency Adjustment	\$ 61,175	1%
Dividends, Interest & Rent	\$ 1,347,902	29%
Transfer Payments	\$ 767,918	16%
<b>Estimated TPI</b>	<b>\$ 4,684,662</b>	<b>100%</b>

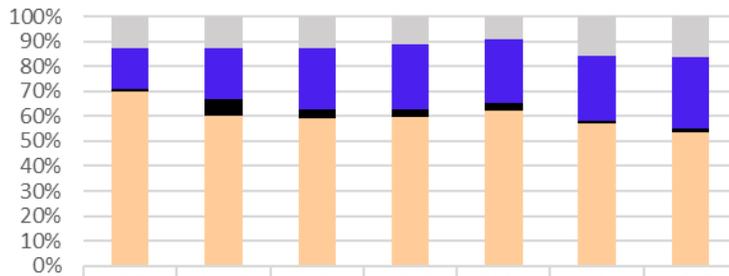
**Total Personal Income (TPI)** is a measure of all sources of income in the region. The four main components of TPI are: employment earnings; residency adjustments; dividends, interest and rent; and transfer payments. For an explanation of what these components include refer to the **Glossary**.

Source: Bureau of Economic Analysis

2017 Total Personal Income by County (\$000)						
	Archuleta	Dolores	La Plata	Montezuma	San Juan	Region 9
Employment Earnings	47%	44%	58%	47%	54%	54%
Residency Adjustment	1%	12%	-1%	7%	7%	1%
Dividends, Interest & Rent	30%	21%	31%	24%	26%	29%
Transfer Payments	23%	24%	13%	23%	13%	16%
Total	\$535,465	\$80,162	\$2,902,362	\$1,130,503	\$36,170	4,684,662
60+ Share	16%	17%	8%	13%	9%	11%

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.

### Region 9 Total Personal Income Trends



	1970	1980	1990	2000	2010	2015	2017
Transfer Payments	13%	13%	13%	11%	9%	16%	16%
Dividends, Interest & Rent	17%	20%	25%	26%	26%	26%	29%
Residency Adjustment	1%	6%	4%	3%	3%	1%	1%
Earned Income	70%	60%	59%	60%	62%	57%	54%

Between 1970 and 2017, 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.

### Per Capita Income Comparison

	PCI 2017	% of USA
USA	\$ 51,640	100%
Colorado	\$ 54,646	106%
Archuleta	\$ 39,944	77%
Dolores	\$ 34,214	66%
La Plata	\$ 52,759	102%
Montezuma	\$ 40,336	78%
San Juan	\$ 47,138	91%

Source: Bureau of Economic Analysis

**Per Capita Income** – All income in a region is added together (TPI), and then divided by the number of residents. PCI in most of our counties, with the exception of La Plata, are not on a par with state and national incomes.

### 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.

<https://onthemap.ces.census.gov/>.

### Housing

Detailed housing data is available in separate reports located on the Region 9 website at <http://www.scan.org/index.php?data-reports=yes>

County	2017 # Sales	2018 # Sales	2017 Median	2018 Median
Archuleta	518	475	\$ 276,000	\$ 305,000
Dolores	16	29	\$ 146,000	\$ 114,500
La Plata	1,190	1,155	\$ 360,000	\$ 387,500
Montezuma	359	418	\$ 181,500	\$ 217,500
San Juan	38	23	\$ 215,000	\$ 235,000

Courtesy of The Wells Group, Durango, CO

### Other Data Reports For the Region

Region 9 also collaborates on other reports designed to track community related data, such as, economic trends, economic impact studies, livable wages, and other topics. These reports are available at

<http://www.scan.org/index.php?data-reports=yes>.

## ARCHULETA COUNTY

County Seat – Pagosa Springs

Archuleta County developed as a unique 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	2017	Ann. Avg % Change 2010-17
Archuleta	12,060	13,316	1.4%
Pagosa Springs	1,722	1,937	1.7%
Unincorporated	10,338	11,379	1.4%

Source: Colorado State Demography Office

From 1990 to 2000, the population of Archuleta County grew by 6.4% annually, and was ranked 5<sup>th</sup> of 64 Colorado counties (14<sup>th</sup> nationwide) for rate of growth. Since 2010, the estimated annual rate of growth has slowed to about 2%. The State Demographer estimates an increase of about 7,900 residents in the next 20 years. These population figures do not 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. [https://scan.org/uploads/Archuleta\\_County\\_Housing\\_Report\\_2016.pdf](https://scan.org/uploads/Archuleta_County_Housing_Report_2016.pdf)

### Employment and Income

Archuleta County 2017 Total Employment	# of Jobs	% of Jobs	*Avg. ann. wage	# Jobs % Change 2015-2017
Agriculture	357	5%	\$ 42,929	3%
Mining	43	1%	\$ 42,112	-9%
Utilities	27	0%	\$ 79,007	-13%
Construction	739	11%	\$ 37,703	8%
Manufacturing	152	2%	\$ 26,154	23%
Wholesale Trade	50	1%	\$ 55,981	32%
Retail Trade	904	14%	\$ 27,543	3%
Transportation & Warehousing	59	1%	\$ 56,524	0%
Information	59	1%	\$ 48,917	-11%
Finance Activities	128	2%	\$ 55,755	2%
Real Estate	457	7%	\$ 38,801	2%
Professional & Business Services	367	6%	\$ 65,322	-3%
Management of Companies and Enterprises	6	0.1%	\$ 100,551	20%
Administration and Waste Management	263	4%	\$ 25,494	14%
Private Education	62	1%	\$ 8,772	0%
Health Services	454	7%	\$ 28,329	0%
Arts, Entertainment, and Recreation	139	2%	\$ 18,762	-8%
Accommodation and Food	847	13%	\$ 18,732	12%
Other Services, except Public Administration	636	10%	\$ 29,143	11%
Government	883	13%	\$ 50,900	10%
Total	6,632	100%	\$33,944	6%

In 2017, county unemployment rates (3.0%) were higher than the state (2.8%), but lower than the nation (4.4%). This table includes wage earners as well as proprietors (owners). About 67% of total employment is by wage earners, while 33% is through proprietors. The service sector (the 8 highlighted fields) employs about 43% 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. The U.S. Census Bureau estimates that in 2015 there were 1,252 wage and salary workers commuting out of the county for work, primarily to La Plata County (10%) and San Juan County, New Mexico (3%). In contrast, 930 people were commuting in for work, primarily from La Plata

County (8%) and Alamosa County (2.0%), which is located about 65 miles east of Wolf Creek Pass. These estimates only reflect those jobs covered by unemployment insurance. <https://onthemap.ces.census.gov/>

2017 Employment Share by Wage

<sup>1</sup> Avg. Annual Wage	<sup>2</sup> Low Wage	<sup>3</sup> Mid Wage	<sup>4</sup> High Wage	<sup>5</sup> Livable Wage
\$33,940	< \$27,150	\$27,151 - \$40,380	>\$41,381	\$61,860
	22%	48%	30%	6%

See glossary for wage thresholds

Archuleta County 2017 Base Industries	# of Jobs	% of Jobs
Agribusiness	473	9%
Mining	35	1%
Manufacturing	58	1%
Government	126	2%
Regional Services	520	10%
Tourism	1,544	30%
Households	1,628	32%
Indirect Unassigned	761	15%
Total	5,145	100%

**Base analysis** distinguishes which industries are responsible for overall growth and change. For more information regarding base analysis please refer to the *Glossary (p. 19)*.

In Archuleta, the largest base employment industries are tourism and households that spend money earned elsewhere (i.e. second home owners and retirees). More information regarding base industries is available on Region 9's website. [https://scan.org/uploads/2018\\_Region\\_9\\_Base\\_Industries\\_Analysis.pdf](https://scan.org/uploads/2018_Region_9_Base_Industries_Analysis.pdf)

**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 2018	# of Jobs
Upper San Juan Hospital District	280
Archuleta County School Dist. 50 JT	275
Walmart	190
Visting Angels of the Southwest	151
Archuleta County	150
City Market	132
Springs Resort LTD	100
Wyndam Pagosa	75
Pine Ridge Extended Care Center LLC	50
Town of Pagosa Springs	42

Archuleta 2017 Total Personal Income (\$000)		% of Total
Employment Earnings	\$ 249,539	47%
Residency Adjustment	\$ 3,607	1%
Dividends, Interest & Rent	\$ 159,477	30%
Transfer Payments	\$ 122,842	23%
<b>Estimated TPI</b>	<b>\$ 535,465</b>	<b>100%</b>

Source: Bureau of Economic Analysis

**Total Personal Income (TPI)** is the sum of all income paid to residents of Archuleta County from various sources. Retirees brought in \$87 million (16%) of TPI through transfer payments, up from 15% in 2015.

**Per Capita Income (PCI)** of Archuleta County is 77% of the National PCI and 73% of Colorado's PCI.

Per Capita Income 2017		
	PCI 2017	% of USA
<b>USA</b>	\$ 51,640	100%
<b>Colorado</b>	\$ 54,646	106%
<b>Archuleta</b>	\$ 39,944	77%

Source: Bureau of Economic Analysis

**Enterprise Zones** – The county as a whole is not an enterprise zone, though eligible areas have an Enhanced Zone status through 2020, based on employment and income criteria. The county has two ineligible census blocks, one of which (9743003) bisects the Town of Pagosa Springs; with the north half in the EZ, and the south half generally out. Southern Ute Tribal lands are included in the eligible census block 9404001 [https://scan.org/uploads/Summary\\_Map\\_-\\_Archuleta\\_County\\_Enterprise\\_Zone\\_Map.pdf](https://scan.org/uploads/Summary_Map_-_Archuleta_County_Enterprise_Zone_Map.pdf)

**Opportunity Zones** – The County has one eligible census tract, 9744. [https://scan.org/uploads/pagosa\\_enlarged.pdf](https://scan.org/uploads/pagosa_enlarged.pdf)

More detailed information regarding Archuleta County is available at [www.scan.org](http://www.scan.org) under regional data.

## DOLORES COUNTY

## County Seat – Dove Creek

The agricultural sector in the western portion of the county, built on the production of dry land crops, was enhanced by the introduction of irrigation from McPhee Reservoir. More recently, the Doe Canyon helium production facility has added to the economic base of the area by creating high-paying jobs. The mountainous (eastern) part of Dolores County (the Rico area) historically supplied a number of small saw mills and was the site of gold, silver, copper, lead, zinc and molybdenum mining in the Rico area. Access to scenic public lands in the across the county provide recreational opportunities, however, the tourist base is served primarily by businesses outside of the county.

### Population

	2010	2017	Ann. Avg % Change 2010-17
Dolores	2,060	2,040	-0.1%
Dove Creek	734	722	-0.2%
Rico	264	263	-0.1%
Unincorporated	1,062	1,055	-0.1%

From 1990 to 2000, the population of Dolores County grew by 2.1% annually. The population 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. From 2010 to 2017 Dove Creek's population declined an average of -0.2% annually.

Source: Colorado State Demography Office

Rico, located on the east-side of the county, declined an average of -0.1% annually. Unincorporated areas, particularly around Cahone, have also seen declines. The State Demographer estimates an increase of about 324 residents in the county in the next 20 years.

### Employment and Income

Dolores County 2017 Total Employment	# of Jobs	% of Jobs	*Avg. ann. wage	# Jobs % Change 2015-2017
Agriculture	180	22%	\$ 24,203	-5%
Mining	30	4%	\$ 66,588	329%
Construction	39	5%	\$ 40,996	-90%
Manufacturing	31	4%	\$ 48,746	48%
Retail Trade	71	9%	\$ 21,783	9%
Transportation & Warehousing	32	4%	\$ 33,592	167%
Administration and Waste Management	21	3%	\$ 41,254	-19%
Accommodation and Food	59	7%	ND	5%
Government	238	29%	\$ 39,038	5%
Sectors Not Disclosed (ND)	123	15%		1267%
Total	824	100%	\$ 33,765	-25%

In 2017, county unemployment rates (3.0%) were higher than the state (2.8%) and lower than the nation (4.4%). About 76% of total employment is by wage earners, while 33% is through proprietors (owners). Government was a very strong employment sector in 2017, accounting for 29% of jobs.

The service sector (the 7 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.**

2017 Employment Share by Wage

<sup>1</sup> Avg. Annual Wage	<sup>2</sup> Low Wage	<sup>3</sup> Mid Wage	<sup>4</sup> High Wage	<sup>5</sup> Livable Wage
\$33,760	< \$27,010	\$27,011 - \$40,170	>\$40,171	\$51,672
	30%	33%	15%	4%

See glossary for wage thresholds

The U.S. Census Bureau estimates that in 2015 there were 272 wage and salary workers commuting out of the county for work, primarily to Montezuma County (14%) and San Miguel County (6%). In contrast, 820 people were commuting in for work, primarily from Montezuma County (14%) and San Juan County, NM (7%). These estimates only reflect those jobs covered by unemployment insurance. <https://onthemap.ces.census.gov/>.

Dolores 2017 Base Industries	# of Jobs	% of Jobs
Agribusiness	215	26%
Mining	30	4%
Manufacturing	28	3%
Government	43	5%
Regional Services	75	9%
Tourism	58	7%
Households	300	36%
Indirect Unassigned	73	9%
Total	822	100%

**Base analysis** distinguishes which industries are responsible for overall growth and change. These activities *bring in outside dollars* to circulate within the local economy. For more information please refer to the **Glossary (p. 19)**.

In Dolores, the largest base employment industries are agribusiness and households that spend money earned elsewhere (i.e. retirees). Agribusiness is down from 32%, and Households are up from the 22% noted in 2015. More information on base industries in Dolores is available at [https://scan.org/uploads/2018\\_Region\\_9\\_Base\\_Industries\\_Analysis.pdf](https://scan.org/uploads/2018_Region_9_Base_Industries_Analysis.pdf).

**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 - Dolores County 2018	# of Jobs
Dolores County	50
Dolores County School Dist. RE2J	50
Community Health Clinic	27
Dunton Hot Springs	25
Dove Creek Superette	24
Air Products Helium	14
Dove Creek Implement	12

>10 employees

Dolores 2017 Total Personal Income (\$000)		% of Total
Employment Earnings	\$ 35,240	44%
Residency Adjustment	\$ 9,442	12%
Dividends, Interest & Rent	\$ 16,531	21%
Transfer Payments	\$ 18,949	24%
<b>Estimated TPI</b>	<b>\$ 80,162</b>	<b>100%</b>

Source: Bureau of Economic Analysis

**Total Personal Income (TPI)** is the sum of all income paid to residents of Dolores County from various sources. Retirees brought in more than \$13.6 million (17%) of TPI through transfer payments, up from 14% in 2015.

**Per Capita Income (PCI)** of Dolores County is 66% of the National PCI and 63% of Colorado's PCI.

Per Capita Income 2017		
	PCI 2017	% of USA
<b>USA</b>	\$ 51,640	100%
<b>Colorado</b>	\$ 54,646	106%
<b>Dolores</b>	\$ 34,214	66%

Source: Bureau of Economic Analysis

**Enterprise Zones** – 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 2020.

[https://scan.org/uploads/Dolores\\_County\\_Enterprise\\_Zone\\_with\\_Summary.pdf](https://scan.org/uploads/Dolores_County_Enterprise_Zone_with_Summary.pdf)

**Opportunity Zones** – All of Dolores County is a designated Opportunity Zone.

[https://scan.org/uploads/Dolores\\_County\\_OZ.pdf](https://scan.org/uploads/Dolores_County_OZ.pdf).

More detailed information regarding Dolores County is available at [www.scan.org](http://www.scan.org) under regional data.

## LA PLATA COUNTY

## County Seat – Durango

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	2017	Ann. Avg % Change 2010-17
<b>La Plata</b>	51,441	55,619	1.1%
<b>Bayfield</b>	2,357	2,702	2.0%
<b>Durango</b>	16,901	18,518	1.3%
<b>Ignacio</b>	699	725	0.5%
<b>Unincorporated</b>	31,484	33,674	1.0%

Source: Colorado State Demography Office

The State Demographer estimates an increase of about 23,425 residents in the county in the next 20 years.

Between 2010 and 2017, La Plata County grew 1.1% annually, with most of the growth occurring in Bayfield and Durango. Ignacio saw slower growth, as did unincorporated areas of the county, including the Southern Ute Indian Tribe, headquartered in Ignacio. More information about the Southern Ute Tribe is on page 18 of this report. These population figures do not reflect the large number of seasonal visitors, many of whom own second homes in the county. The

### Employment and Income

La Plata County 2017 Total Employment	# of Jobs	% of Jobs	*Avg. ann. wage	# Jobs % Change 2015-2017
Agriculture	946	3%	\$ 28,762	-1%
Mining	626	2%	\$ 108,810	-16%
Utilities	148	0.4%	\$ 81,076	6%
Construction	3,264	9%	\$ 50,777	-5%
Manufacturing	880	3%	\$ 40,556	14%
Wholesale Trade	695	2%	\$ 54,172	2%
Retail Trade	3,724	11%	\$ 29,522	4%
Transportation & Warehousing	799	2%	\$ 59,005	10%
Information	487	1%	\$ 61,508	0%
Finance Activities	1,103	3%	\$ 78,913	1%
Real Estate	1,336	4%	\$ 46,975	4%
Professional & Business Services	2,225	6%	\$ 64,859	3%
Management of Companies and Enterprises	88	0.3%	\$ 90,417	49%
Administration and Waste Management	1,346	4%	\$ 32,087	2%
Private Education	544	2%	\$ 43,956	7%
Health Services	4,156	12%	\$ 49,369	9%
Arts, Entertainment, and Recreation	1,392	4%	\$ 20,777	14%
Accommodation and Food	3,511	10%	\$ 19,327	4%
Other Services, except Public Administration	1,771	5%	\$ 30,731	3%
Government	5,967	17%	\$ 57,017	3%
<b>Total</b>	<b>35,008</b>	<b>100%</b>	<b>\$ 44,789</b>	<b>3%</b>

In 2017, county unemployment rates (2.5%) were lower than the state (2.8%) and the nation (4.4%).

This table includes wage earners as well as proprietors (owners). About 80% of total employment is by wage earners, while 20% is through proprietors.

The service sector (including all 8 highlighted fields) employs about 43% 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.

The management of companies and enterprises sector has grown 49% since 2015.

### 2017 Employment Share by Wage

<sup>1</sup> Avg. Annual Wage	<sup>2</sup> Low Wage	<sup>3</sup> Mid Wage	<sup>4</sup> High Wage	<sup>5</sup> Livable Wage
\$45,790	< \$35,830	\$35,831 - \$53,300	>\$53,300	\$68,120
	36%	29%	35%	5%

See glossary for wage thresholds

The U.S. Census Bureau estimates that in 2015 there were 5,494 wage and salary workers commuting out of the county for work, primarily to San Juan County, NM (5%), and to Montezuma County (3%). In contrast, 6,102 people were commuting in for work, primarily from San Juan County, NM (5%) and Montezuma County (4%). These estimates only reflect those jobs covered by unemployment insurance <https://onthemap.ces.census.gov/>.

La Plata 2017 Base Industries	# of Jobs	% of Jobs
Agribusiness	1,681	7%
Mining	720	3%
Manufacturing	276	1%
Government	2,415	10%
Regional Services	4,310	17%
Tourism	6,351	26%
Households	4,888	20%
Indirect Unassigned	4,195	17%
Total	24,836	100%

**Base analysis** distinguishes which industries are responsible for overall growth and change. These activities *bring in outside dollars* to circulate within the local economy. For more information regarding base analysis please refer to the **Glossary (p. 19)**.

In La Plata, the largest base employment industries are tourism and households that spend money earned elsewhere (i.e. retirees). More information on base industries in La Plata is available at [https://scan.org/uploads/2018\\_Region\\_9\\_Base\\_Industries\\_Analysis.pdf](https://scan.org/uploads/2018_Region_9_Base_Industries_Analysis.pdf).

**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 2018	# of Jobs
Mercy Regional Medical Center	1,321
Durango School Dist. 9R	1,011
Southern Ute Indian Tribe	980
Fort Lewis College	611
City of Durango	595
Crossfire LLC	474
La Plata County	458
Sky Ute Casino Resort	400
Worldpay	360
Walmart	322

La Plata 2017 Total Personal Income (\$000)		% of Total
Employment Earnings	\$1,673,644	58%
Residency Adjustment	\$ (30,453)	-1%
Dividends, Interest & Rent	\$ 892,896	31%
Transfer Payments	\$ 366,275	13%
<b>Estimated TPI</b>	<b>\$2,902,362</b>	<b>100%</b>

**Total Personal Income (TPI)** is the sum of all income paid to residents of La Plata County from various sources. Retirees brought in \$241 million (8%) of TPI through transfer payments. **A negative residency adjustment means that more people are commuting into the county for employment than are commuting out.**

Source: Bureau of Economic Analysis

**Per Capita Income (PCI)** of La Plata County is 102% of the National PCI and is 96% than Colorado's PCI.

Per Capita Income 2017		
	PCI 2017	% of USA
<b>USA</b>	\$ 51,640	100%
<b>Colorado</b>	\$ 54,646	106%
<b>La Plata</b>	\$ 52,759	102%

Source: Bureau of Economic Analysis

**Enterprise Zones** – Nineteen of the 33 census blocks in the county are designated enterprise zones. [https://scan.org/uploads/LPC\\_Detailed\\_Areas\\_-\\_Effective\\_2016.pdf](https://scan.org/uploads/LPC_Detailed_Areas_-_Effective_2016.pdf)

**Opportunity Zones** – Census Tracts 9404 and 9711 are eligible in La Plata County. [https://scan.org/uploads/Durango\\_enlarged.pdf](https://scan.org/uploads/Durango_enlarged.pdf)

More detailed information regarding La Plata County is available at [www.scan.org](http://www.scan.org) under regional data.

## MONTEZUMA COUNTY

## County Seat – Cortez

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.

### Population

	2010	2017	Ann. Avg % Change 2010-17
Montezuma	25,532	25,859	0.2%
Cortez	8,481	8,484	0.01%
Dolores	936	962	0.4%
Mancos	1,336	1,410	0.8%
Unincorporated	14,779	15,003	0.2%

Between 2010 and 2017, Montezuma County grew 0.2% annually with most of the growth occurring in Mancos (0.8%). 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 18 of this report. The State Demographer estimates an increase of about 12,000 residents in the county in the next 20 years.

Source: Colorado State Demography Office

### Employment and Income

Montezuma County 2017 Total Employment	# of Jobs	% of Jobs	*Avg. ann. wage	# Jobs % Change 2015-2017
Agriculture	829	7%	\$ 25,386	-2%
Mining	214	2%	\$ 77,830	-17%
Utilities	89	0.7%	\$ 63,326	2%
Construction	719	6%	\$ 36,627	-2%
Manufacturing	431	3%	\$ 36,688	15%
Wholesale Trade	249	2%	\$ 50,733	-7%
Retail Trade	1,549	12%	\$ 28,788	2%
Transportation & Warehousing	238	2%	\$ 48,494	-10%
Information	60	0.5%	\$ 44,458	-12%
Finance Activities	244	2%	\$ 46,364	8%
Real Estate	347	3%	\$ 39,452	11%
Professional & Business Services	478	4%	\$ 45,210	3%
Management of Companies and Enterprises	55	0.4%	\$ 80,223	20%
Administration and Waste Management	245	2%	\$ 25,370	-25%
Private Education	238	2%	\$ 30,778	37%
Health Services	1,847	15%	\$ 36,184	18%
Arts, Entertainment, and Recreation	136	1%	\$ 200,709	9%
Accommodation and Food	1,126	9%	\$ 16,972	5%
Other Services, except Public Administration	776	6%	\$ 26,795	0%
Government	2,800	22%	\$ 46,025	1%
<b>Total</b>	<b>12,670</b>	<b>100%</b>	<b>\$ 34,988</b>	<b>3%</b>

In 2017, county unemployment rates (4.0%) were higher than the state (2.8%) and the nation (4.4%). 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 of the highlighted fields) employs about 39% of workers in the county. Many of the service jobs in Montezuma County support accommodation and food services and health and social assistance.

A number of job sectors have seen declines since 2015, most notably administration and waste management (-25%), and mining (-17%). Other sectors have seen job growth, i.e. private education (37%) and management of companies and enterprises.

### 2017 Employment Share by Wage

<sup>1</sup> Avg. Annual Wage	<sup>2</sup> Low Wage	<sup>3</sup> Mid Wage	<sup>4</sup> High Wage	<sup>5</sup> Livable Wage
\$34,990	< \$27,990	\$27,991 - \$41,635	>\$41,636	\$53,953
	23%	40%	36%	4%

See glossary for wage thresholds

The U.S. Census Bureau estimates that in 2015 there were 3,555 wage and salary workers commuting out of the county for work, with the greatest number of workers going to La Plata County (9%) and San Juan County, NM (5%). There were 2,284 people commuting in to the county for work – primarily from La Plata County (8%) and San Juan County, NM (4%). These estimates only reflect those jobs covered by unemployment insurance. <https://onthemap.ces.census.gov/>

Montezuma 2017 Base Industries	# of Jobs	% of Jobs
Agribusiness	1,004	11%
Mining	203	2%
Manufacturing	272	3%
Government	506	5%
Regional Services	2,009	21%
Tourism	1,456	15%
Households	3,265	34%
Indirect Unassigned	839	9%
Total	9,554	100%

**Base analysis** distinguishes which industries are responsible for overall growth and change. These activities *bring in outside dollars* to circulate within the local economy. For more information regarding base analysis please refer to the *Glossary (p. 19)*.

In Montezuma the largest base employment industry 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** 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 - Montezuma County 2018	# of Jobs
Montezuma Cortez School Dist. RE1	425
Ute Mountain Casino	400
Southwest Memorial Hospital	335
Walmart	318
Montezuma County	230
City of Cortez	175
City Market	122
Pasco SW Inc	121
Ute Mountain Ute Tribe	109

Montezuma 2017 Total Personal Income (\$000)	% of Total
Employment Earnings	\$ 529,872 47%
Residency Adjustment	\$ 76,113 7%
Dividends, Interest & Rent	\$ 269,469 24%
Transfer Payments	\$ 255,049 23%
<b>Estimated TPI</b>	<b>\$1,130,503 100%</b>

Source: Bureau of Economic Analysis

**Total Personal Income (TPI)** is the sum of all income paid to residents of Montezuma County from various sources. Retirees brought in \$149 million (13%) of TPI through transfer payments.

**Per Capita Income (PCI)** of Montezuma County is 78% of National PCI and 74% of Colorado’s PCI.

Per Capita Income 2017		
	PCI 2017	% of USA
<b>USA</b>	\$ 51,640	100%
<b>Colorado</b>	\$ 54,646	106%
<b>Montezuma</b>	\$ 40,336	78%

Source: Bureau of Economic Analysis

**Enterprise Zones** – All of Montezuma County is a designated Enterprise Zone. [https://scan.org/uploads/Summary\\_Map\\_-\\_Montezuma\\_-\\_effective\\_2016\\_\(2\).pdf](https://scan.org/uploads/Summary_Map_-_Montezuma_-_effective_2016_(2).pdf)

**Opportunity Zones** – Census tract 9411, which encompasses the Ute Mountain Ute Indian Reservation, is an eligible Opportunity Zone. <https://scan.org/uploads/Montezuma.OZ.Updated.pdf>

More detailed information regarding Montezuma County is available at [www.scan.org](http://www.scan.org) under regional data.

## SAN JUAN COUNTY

## County Seat – Silverton

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.

### Population

	2010	2017	Ann. Avg % Change 2010-17
San Juan	709	714	0.1%
Silverton	646	649	0.1%
Unincorporated	63	65	0.4%

In 2017 the county's resident population was 714, a slight increase from 2010. The resident population is expected to maintain, or grow slightly, through 2040. However, seasonal residents are not included in population figures. In the summer there is usually an influx of seasonal residents, many of whom have purchased 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 report in 2015 found that many (65%) of the residential units in the county are owned by people whose primary mailing address is outside of the county – 2nd Homeowners.

Source: Colorado State Demography Office

[https://scan.org/uploads/San\\_Juan\\_County\\_Housing\\_Market\\_Study\\_-\\_2015.pdf](https://scan.org/uploads/San_Juan_County_Housing_Market_Study_-_2015.pdf)

### Employment and Income

San Juan County 2017 Total Employment	# of Jobs	% of Jobs	*Avg. ann. wage	# Jobs % Change 2015-2017
Construction	33	8%	\$ 36,225	10%
Retail Trade	52	12%	\$ 18,794	18%
Professional & Business Services	28	6%	\$ 23,795	4%
Health Services	17	4%	ND	0%
Arts, Entertainment, and Recreation	33	8%	ND	0%
Accommodation and Food	124	29%	\$ 21,706	24%
Other Services, except Public Administration	22	5%	\$ 23,957	47%
Government	75	17%	\$ 40,926	-1%
Sectors Not Disclosed (ND)	51	12%		9%
Total	435	100%	\$ 26,729	17%

In 2017, county unemployment rates (2.2%) were lower than the state (2.8%) and the nation (4.4%).

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 8 highlighted fields. Many of the service jobs in San Juan County

support tourism, in accommodation (lodging) and food services. 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.**

2017 Employment Share by Wage

<sup>1</sup> Avg. Annual Wage	<sup>2</sup> Low Wage	<sup>3</sup> Mid Wage	<sup>4</sup> High Wage	<sup>5</sup> Livable Wage
\$26,730	< \$21,370	\$21,371 - \$31,792	>\$31,792	\$62,321
	12%	40%	17%	0%

See glossary for wage thresholds

The U.S. Census Bureau estimates that in 2015 there were 151 wage and salary workers commuting out of the county for work – with the greatest number of workers going to La Plata County (9%) and Montezuma County (7%). There were also 93 people commuting in to the county for work, primarily from La Plata County (9%). These estimates only reflect those jobs covered by unemployment insurance. <https://onthemap.ces.census.gov/>.

San Juan 2017 Base Industries	# of Jobs	% of Jobs
Agribusiness	0	0%
Mining	0	0%
Manufacturing	2	1%
Government	10	3%
Regional Services	40	11%
Tourism	215	59%
Households	84	23%
Indirect Unassigned	13	4%
Total	364	100%

**Base analysis** distinguishes which industries are responsible for overall growth and change. These activities *bring in outside dollars* to circulate within the local economy. For more information regarding base analysis please refer to the **Glossary (p. 19)**. In San Juan the largest base employment industries are tourism, which has grown from 52% in 2015; and households that spend money earned elsewhere, which has declined from 26% in 2015.

**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 2018	# of Jobs
Silverton Outdoor Learning and Rec Center	40
Silverton School Dist 1	31
Handlebars	28
San Juan County	28
Grand Imperial Hotel	22
Town of Silverton	12

San Juan 2017 Total Personal Income (\$000)		% of Total
Employment Earnings	\$ 19,372	54%
Residency Adjustment	\$ 2,466	7%
Dividends, Interest & Rent	\$ 9,529	26%
Transfer Payments	\$ 4,803	13%
<b>Estimated TPI</b>	<b>\$ 36,170</b>	<b>100%</b>

Source: Bureau of Economic Analysis

**Per Capita Income (PCI)** of San Juan County is 90% of National PCI and 85% of Colorado’s PCI.

**Total Personal Income (TPI)** is the sum of all income paid to residents of San Juan County from various sources. Retirees (60+) brought in \$3.3 million (9%) of TPI through transfer payments, this is slightly down from the 10% estimated in 2015.

Per Capita Income 2017		
	PCI 2017	% of USA
USA	\$ 51,640	100%
Colorado	\$ 54,646	106%
San Juan	\$ 47,138	91%

Source: Bureau of Economic Analysis

**Enterprise Zones** – All of San Juan County has been designated as an Enhanced Enterprise Zone through 2020. <https://scan.org/uploads/Summary Map - San Juan County -effective 2016.pdf>

**Opportunity Zones** – All of San Juan County has been designated as an Opportunity Zone. <https://scan.org/uploads/San Juan County OZ.pdf>

More detailed information regarding San Juan County is available at [www.scan.org](http://www.scan.org), under regional data.

## NATIVE AMERICAN TRIBES

Region 9 is the home of the Southern Ute and the Ute Mountain Ute Indian Tribes. Native American land jurisdiction is complicated by various forms of ownership. While title to most of the tribal lands within the United States is held in trust by the Federal Government, tribes are self-governing. As a result, tribal lands are subject to tribal and some Federal laws, but are exempt from state laws. In southwestern Colorado, the General Allotment Act (also known as the Dawes Act) of 1887 splintered the Ute reservation lands by carving land allotments out of the existing reservation. Many of the Mouache and Caputa Utes accepted these “farming” allotments located in the eastern portion, which were included within the boundary of the Southern Ute Reservation. Lands not allotted, or about 85 percent of the reservation, were declared “excess” by the federal government and opened to white settlers in 1895. Allotments were made available until an act of Congress in 1934 discontinued the allotment system. The Weeminuche Utes, led by Chief Ignacio, refused to accept allotments and moved to the western portion, which became known as the Ute Mountain Ute Indian Reservation. Over time, a few allotments have also been associated with the Weeminuche.

**Southern Ute Indian Tribe** – The Southern Ute Indian Reservation boundaries encompass Tribal trust lands, Indian allotments, homestead fee tracts, tribally-owned or Indian-owned fee land, and lands managed by Bureau of Reclamation and/or the United States Forest Service. This patchwork pattern of land ownership is commonly referred to as a “checkerboard”. The reservation land base includes about 750,000 acres, seven major rivers, and the Navajo State Park. The Southern Ute Tribal enrollment is currently about 1,500, with the majority of the members living on the reservation.

Tribal headquarters are located adjacent to the Town of Ignacio, in La Plata County. Tribal activity generates millions of dollars per year in direct and indirect economic activity. The Tribe is the largest employer in La Plata County with 1,400 people employed in Tribal governance and various enterprises. The Sky Ute Casino – Resort opened in 2008 and employs about 400 people. The Southern Ute Growth Fund was started in 1999 and has investments spanning America and Canada. The Growth Fund manages over \$3 billion in assets and employees and has a staff of about 360 people. The Tribe’s businesses are located both on and off-Reservation in the areas of oil and gas production, natural gas gathering, real estate development, private equity investment, housing construction, sand and gravel products, media, and gaming. The Tribe completed a Comprehensive Economic Development Strategy (CEDS) in 2018. More information is available at <https://www.southernute-nsn.gov/>.

**Ute Mountain Ute Indian Tribe** – The Ute Mountain Ute Reservation and Indian Lands are located in the northwestern portion of New Mexico, the southwestern corner of Colorado, and in southeastern Utah. According to the Bureau of Indian Affairs, the reservation consists of 553,008 acres in Montezuma and La Plata Counties, Colorado, and San Juan County, New Mexico. All of these lands belong to the tribe but are held in trust by the U.S. Government. Additional Ute Mountain Ute lands include 12,096 acres of individual allotments and tribal lands held in trust, all located in San Juan County, Utah. The Tribal enrollment is around 2,095 members, with the majority of the members living on the reservation in Towaoc, Colorado (Montezuma County), and in White Mesa, Utah. The Tribal census shows the largest percentage of the members are in their early twenties and younger.

In 2018 the Tribe was one of the largest employers in Montezuma County with about 900 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, a guaranteed source of drinking and irrigation water, which 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. The Tribe is producing and marketing corn meal products from tribal farms and has developed a corn meal facility. More information is available at <http://www.utemountainutetribes.com/>.

## GLOSSARY OF KEY TERMS

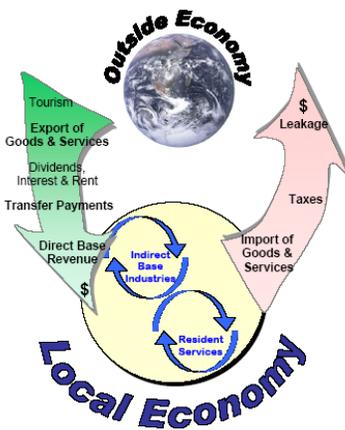
**Economic Base Analysis** is a tool to describe economic activity by the source of revenue, whether the money generated by sales comes from outside the local economy, or from within the local economy. This type of analysis is designed to define those economic activities that drive or sustain the local 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 home owners and some are telecommuters, meaning that they work for companies or clients using phone, internet, faxes, etc.

### 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.

<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.

<http://www.colorado.gov/cs/Satellite/DOLA-Main/CBON/1251590805419>

**Wage thresholds** – The average annual wage<sup>1</sup> is drawn from the Quarterly Census of Employment & Wages (QCEW Program): low wage<sup>2</sup> = 80% or less than the average annual wage; mid wage<sup>3</sup> = greater than 80% and less than 120% of the average annual wage; high wage<sup>4</sup> is greater than 120% of the annual average wage. Livable wage<sup>5</sup> 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 this information 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 [www.advancecolorado.com/ez](http://www.advancecolorado.com/ez).

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

## USEFUL CONTACTS

For business and relocation assistance contact Region 9, or one of the community economic development organizations, listed below. If your business needs technical assistance, the Southwest Colorado Small Business Development Center at Fort Lewis College offers numerous services.

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### Economic Development Organizations

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#### Region 9 Economic Development District

135 Burnett Dr. Unit 1  
Durango, CO 81301  
Phone (970) 247-9621  
[www.scan.org](http://www.scan.org)



#### Ute Mountain Ute Indian Tribe

124 Mike Wash Road  
Towaoc, CO 81334  
[www.utemountainutetribe.com](http://www.utemountainutetribe.com)

#### Southwest Colorado Small Business

Development Center  
1000 Rim Dr.  
Durango, CO 81301  
Phone (970) 247-7009  
[www.sbdcfortlewis.org](http://www.sbdcfortlewis.org)



#### San Juan Development Association

P.O. Box 565  
Silverton, CO 81433  
Phone (970) 387-5654  
[www.silvertoncolorado.com](http://www.silvertoncolorado.com)



#### Pagosa Springs Community Development Corp.

PO Box 1859  
Pagosa Springs, CO 81147  
Phone (970) 264-2360  
[www.pagosaspringscdc.org](http://www.pagosaspringscdc.org)  
[cdcinfo@pagosaspringscdc.org](mailto:cdcinfo@pagosaspringscdc.org)



#### Dolores County Development Corp.

P.O. Box 860  
Dove Creek, CO 81328  
[www.dolorescounty.org](http://www.dolorescounty.org)



#### Southern Ute Entrepreneur and Economic

Development Program (SEED)  
Southern Ute Indian Tribe  
P.O. Box 737  
365 Ouray Dr.  
Ignacio, CO 81137  
Phone (970) 563-2463



#### Montezuma Community Economic

Development Association  
PO Box 968  
Cortez, CO 81321  
Phone (970) 560-5581  
[www.montezumaceda.org](http://www.montezumaceda.org)  
[info@montezumaceda.org](mailto:info@montezumaceda.org)



#### La Plata Economic Development Alliance

2301 Main Ave.  
Durango, CO 81301  
Phone (970) 259-1700  
[www.yesLPC.com](http://www.yesLPC.com)

