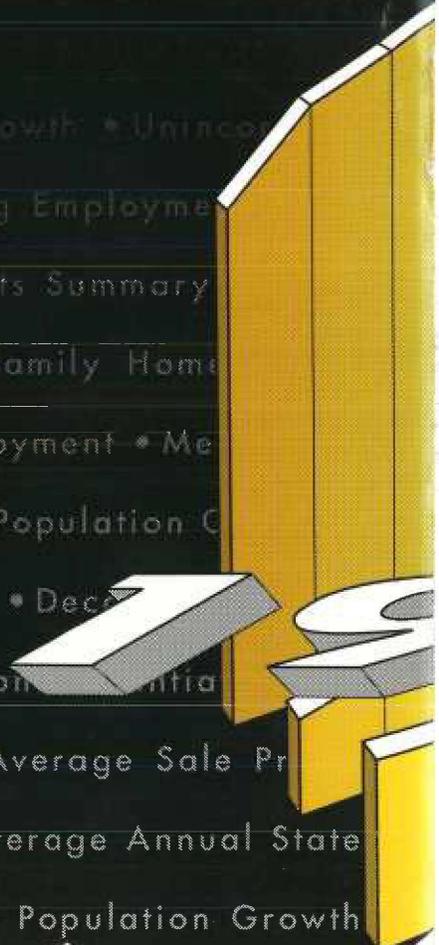


ation Growth • County Population Growth • City Population Growth • Unincor
omy • Job Growth by Sector • Decade Growth in Manufacturing Employme
mercial Space Requirements • Nonresidential Space Requirements Summary
ehold • Residential Growth • Average Sale Price of Single Family Home
ortation Planning • Sales Taxes • Average Annual State Unemployment • Me
ds • Population & Households • City Population Growth • County Population G
olEnrollment • Jefferson County Economy • Job Growth by Sector • Dec
Growth Projections • New Commercial Space Requirements • Non
hly Food Stamp Dollars Per Household • Residential Growth • Average Sale Pr
ated Housing Need • Transportation Planning • Sales Taxes • Average Annual State
ographics • Population Trends • Population & Households • City Population Growth
an Age • Age Distribution • School Enrollment • Jefferson County Economy • Job Gr
oyment • Unemployed Residents • Job Growth Projections • N
eholds Receiving Food Stamps • Monthly Food Stamp Dollars Pe
en Space Acquisitions • Estimated Housing Need • Transportat
ty Population Growth • Demographics • Population Trends • P
orporated Land Use • Median Age • Age Distribution
oyment • Changes in Metro Employment • Employed
nary • Wages by Industry • Households • ing Food



PROFILE

JEFFERSON
COUNTY

JEFFERSON COUNTY

1980

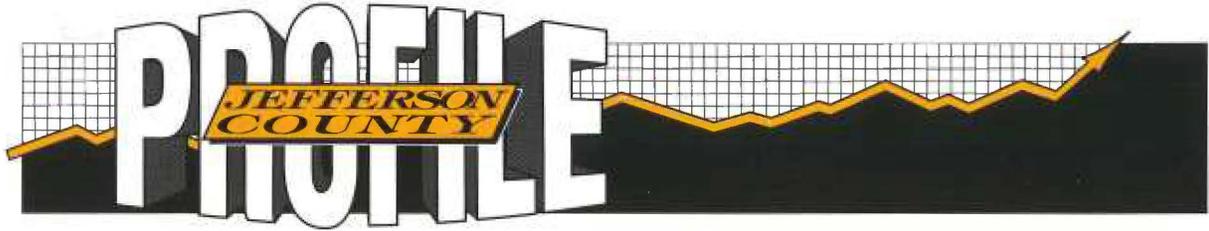
1990

2000



JEFFERSON COUNTY, COLORADO · COUNTY PROFILE · ISSUE NUMBER 2

PROFILE



II EXECUTIVE SUMMARY

1 INTRODUCTION

2 FOREWORD

Average Annual State Unemployment, *Chart*
Annualized Resident Labor Force Estimates, *Table*
Colorado Population, *Chart*

1990 Population Share, *Chart*
Metropolitan Population Change, *Table*
Metro County Population Growth, *Chart*

7 DEMOGRAPHICS

Population Trends, *Table*
Population & Household Estimates, *Table*
City Population Growth, *Chart*
County Population Growth, *Chart*
City Population Growth, *Table*

Population & Households, *Chart*
Unincorporated Land Use, *Table*
Median Age, *Chart*
Age Distribution, *Chart*
School Enrollment, *Table*

14 JEFFERSON COUNTY ECONOMY

Metro 80's New Jobs, *Chart*
Job Growth by Sector, *Chart*
Decade Growth in Manufacturing Employment, *Chart*
Major Employers, *Table*
Changes in Metro Employment, *Table*
Unemployed Residents, *Chart*
Job Growth Projections, *Chart*
Job Growth Projections, *Table*

New Commercial Space Requirements, *Chart*
Nonresidential Absorption, *Table*
Nonresidential Space Requirements Summary, *Table*
Wages by Industry, *Table*
Food Stamp Distributions, *Table*
Households Receiving Food Stamps, *Chart*
Monthly Food Stamp Dollars Per Household, *Chart*

26 BUILT ENVIRONMENT

Residential Growth, *Chart*
Housing Affordability Index, *Table/Chart*

Open Space Acquisitions, *Table*
Estimated Housing Need, *Table*

31 TRANSPORTATION PLANNING

Sales Taxes, *Table*

33 SUMMARY

Property Taxes, *Chart*

35 STUDY BACKGROUND

35 BIBLIOGRAPHY

Board of Commissioners

Gary Laura
Betty Miller
John P. Stone, *Chairman*



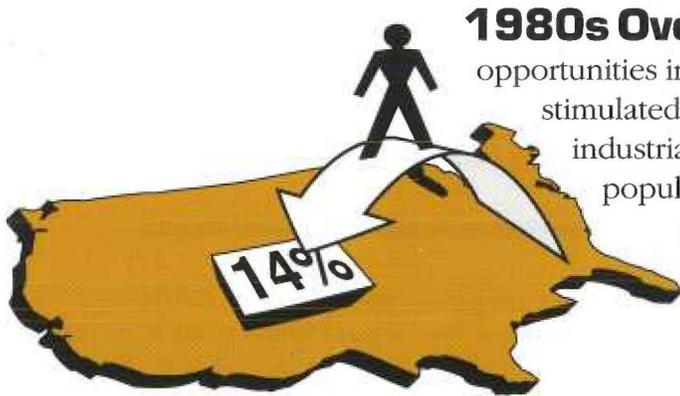
Published January 1992, by the Jefferson County Planning and Zoning Department, 700 Jefferson County Parkway, Suite #220, Golden, CO 80401 Phone: (303)-271-5865

Reprinted April 1993

EXECUTIVE SUMMARY

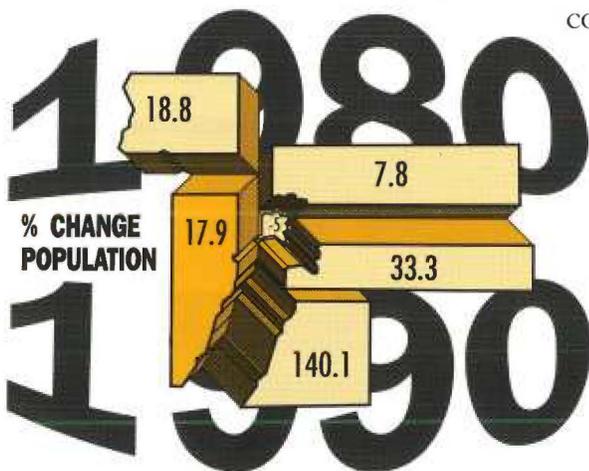
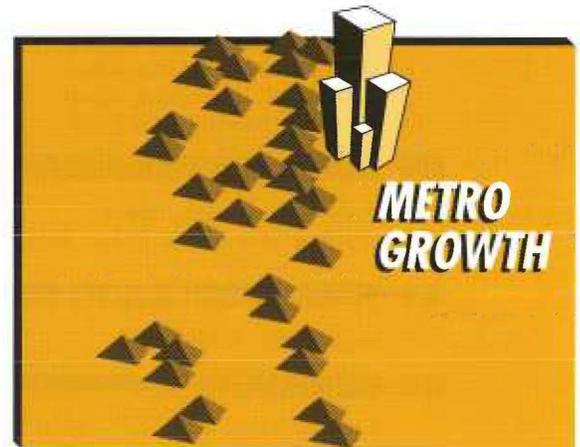
This report examines

economic and demographic changes during the last decade and identifies important demographic, social and economic trends which will influence the future of Jefferson County.



1980s Overview During the 1980s employment opportunities in the southern and western United States stimulated a national population shift from the industrial northeast to the sunbelt. Colorado's population grew more than 14%, from 2.89 million residents in 1980 to 3.3 million in 1990, and represented 1.3% of the nation's population.

In the 1980s much of the state's growth was concentrated in the Denver metropolitan area. The population grew 1.3% annually and increased by 229,858 residents. The metropolitan area grew as a whole but where residents chose to live within the metropolitan area varied widely. Suburban counties gained population while Denver recorded losses.

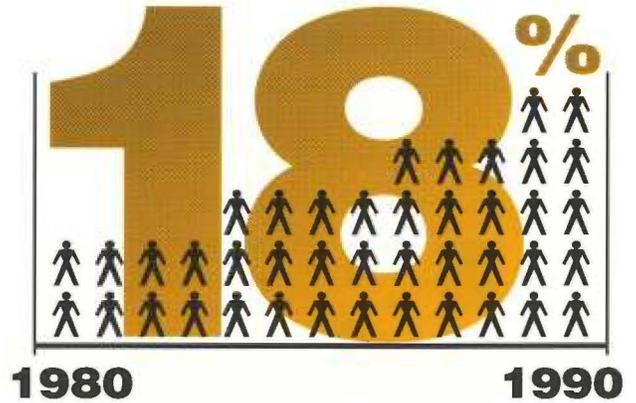


Between 1980 and 1990 Denver County's population dropped 5%, from 492,694 to 467,610, while Jefferson County's population grew 18%, from 371,753 to 438,430.

Population Growth Jefferson County's population grew 18% (*1.7% annually*) during the decade, increasing from 371,753 to 438,430. As the County's population grew it began shifting from incorporated to unincorporated areas. By 1990 nearly 33% of Jefferson County residents lived in unincorporated areas, compared to 29% in 1980. By 1998 Jefferson County is projected to become the most populated County in the state.

Growth rates varied among cities within the County. The fastest growing city was Westminster with a 4% annual average growth rate and Broomfield was second with a 1.7% annual increase.

Westminster had the highest actual increase in population, 24,414. Lakewood's population grew by 12,673 residents, Arvada's by 4,659 and Broomfield's by 3,908.



1990 **2010**

Lakewood remained the largest city in the County with a population of 126,481 and a land area totalling 41.9 square miles. Arvada was the second largest city with 89,235 residents within 21.5 square miles.

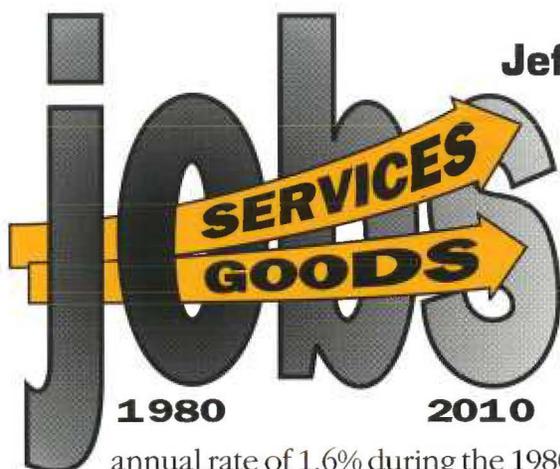
During the next two decades the County population is expected to increase at an average annual rate of .9%, to 522,220 residents, for a total increase of 83,790 residents.

An Aging Population One of the most important trends emerging in the 1990s will be the aging population. In 1990 43% of the County population was baby boomers, approximately 25-49 years of age. The median age was 34.7, up 5 1/2 years from 1980.

As baby boomers grow older the types of services and the way these services are delivered will change. There will be a shift away from services for younger residents to services for older residents. In 1990 13% of Jefferson County's population was over 60 years of age. By 2010 this age group will double and represent 22% of the County population.

Though there will be more emphasis on services for older residents there will be a continued need for services for young children. An increase in the number of births has created a “baby boomlet” which began tapering off in the late 1980s. This boomlet has begun to impact school enrollments, particularly at the elementary level. By the 1994-95 school year enrollments are expected to increase by 3,500 students with 2,100 at the elementary level.

In some older areas of the County, including Lakewood, Wheat Ridge and Edgewater, enrollments are decreasing and the need for additional school capacity is shifting to newly developing portions of north and south Jefferson County. By 1995 48% of all new students will be in the south area and 27% will be in the north area.



Jefferson County Economy

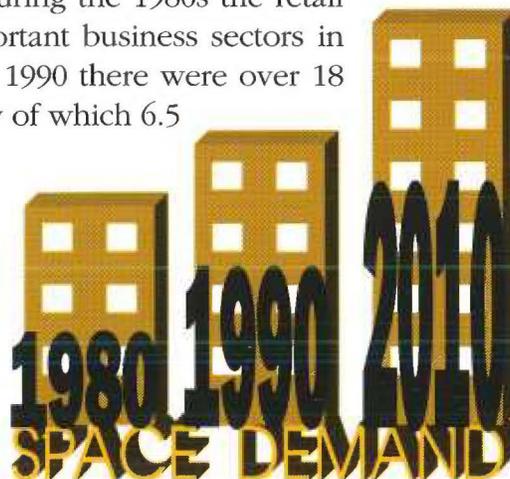
Jefferson County’s growth began with residential development and was followed by employment growth. During the 1980s this pattern began to change when employment grew at more than twice the rate of population, 3.7% compared to 1.7%, and over 40,000 jobs were added. The County labor force grew at an average

annual rate of 1.6% during the 1980s, from 201,361 to 236,528, despite mid-decade job losses in some sectors. By the end of 1990 the unemployment rate was at a decade low of 4.0%.

In the two decades ahead employment will continue to grow at a faster rate than population, 2.1% compared to .9%. By 2010 an estimated 98,777 jobs will be created. Services will become the largest sector with approximately 24,000 new jobs and an annual average growth rate of 2.6%. The retail sector will grow 1.6% annually and add 13,862 jobs. The industrial sector will grow 1.3% annually and gain 11,105 jobs.

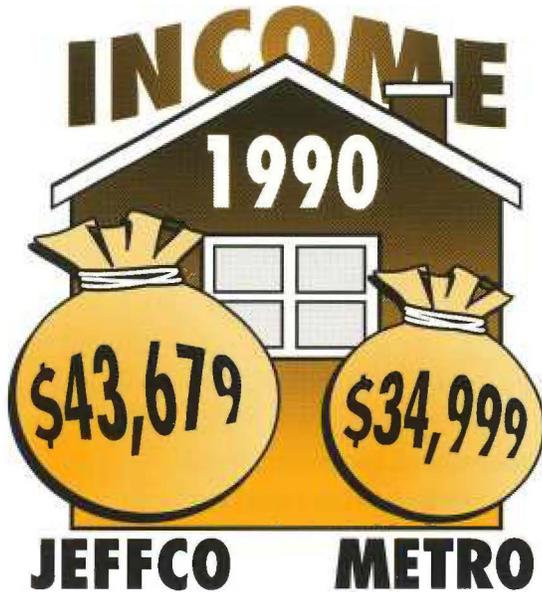
Nonresidential Real Estate During the 1980s the retail sector became one of the County’s most important business sectors in terms of sales tax revenues and land use. By 1990 there were over 18 million square feet of retail space in the County of which 6.5 million was within unincorporated areas.

As the County becomes more economically diverse, service based employment will grow nearly 75%, significantly increasing office space



demand. By 2010 office employment is expected to increase by a total of 60,253 jobs and absorb over 15 million square feet. The retail sector is expected to add 13,862 jobs and absorb 5.5 million square feet. The industrial sector is expected to gain 11,105 jobs and absorb 5.6 million square feet.

Land use patterns will continue to shift toward consumer and business oriented services as the County becomes more urbanized.



Income and Wages In 1990 the median household income of Jefferson County residents was higher than Denver area residents, \$43,679 compared to \$34,999. Over the decade the average wage of \$25,733 for all workers in Jefferson County outpaced inflation by 7%.

Between 1980 and 1990 wages in two employment sectors soundly outpaced inflation: mining wages by 18% and manufacturing wages by 14%. Not all sectors had real income growth. Wages of workers in two sectors actually eroded: construction wages by 14% and retail wages by 16%.

As the County's employment base expanded and incomes increased for most residents, the number of families requiring public assistance increased. Since 1980 the average number of families receiving food stamp assistance increased 40% and the average monthly issuance per household rose 67%, from \$100 to \$167.

Housing Description Over the decade the County's housing stock increased 30% from 137,327 units in 1980 to 178,611 in 1990. The housing mix remained virtually unchanged with 75% of the housing stock classified as single family, 23% multifamily and 1.7% mobile homes.

Increased wages and falling market values made housing more affordable at the end of the decade. In 1990 the average price of a single family home was \$106,222 and the median household income was \$43,679. The typical family in the County earned 59% more than the amount needed to purchase an average priced home at current interest rates.

In 1990 the majority of homes sold, 63%, were priced under \$100,000 and 40% were priced between \$75,000 and \$100,000. Only 2.6% were priced under \$50,000. An anomaly in the County housing market was the mountain areas where many homes sold for over \$250,000.

Housing Demand

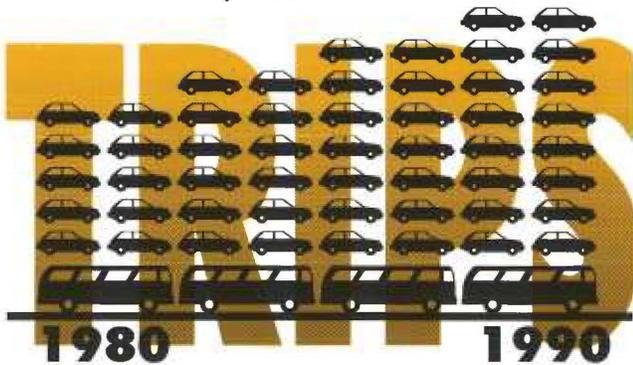
Several demographic forces will affect future housing demand. Slower household formation, smaller household size, a decline in traditional family households and an aging population will have an impact. The average household size has dropped from 2.83 persons per household in 1980 to 2.59 in 1990. By 2010 household size is expected to be 2.35.



County housing demand will grow steadily despite changing demographics. By 2010 over 50,000 new homes will be needed, including 38,877 single family, 11,925 multifamily and 1,034 mobile or manufactured homes.

Transportation Planning

During the 1980s County residents became more mobile, using the automobile more and public transportation less. The number of daily vehicle trips per household increased from 4.37 to 4.73, and the number of transit trips per household remained the same, .10. The automobile will be the primary mode of transportation during this decade but an increase in older drivers will force changes after the year 2000.



The key to sustained economic growth will be the County's ability to attract employment. An adequate transportation system will be essential in attracting employment. Transportation planning should accommodate the needs for automobile travel, public transit, access, environmental quality and economic development.

Summary

Over the last two decades Jefferson County has become a major employment and population center and is no longer suburban in the traditional sense. As the County continues its urbanization process many new growth issues will emerge: water availability, increasing service costs, transportation and changing demographics are a few. These growth issues will be unlike any other in the County's history. Business leaders, public policymakers, residents and planners must anticipate and be prepared to deal with these new challenges.

Economic activities once confined to the urban center are shifting to outlying county areas.

INTRODUCTION The Jefferson County emerging in the 1990s is much different from that of the early 1980s. New people, houses, workplaces and shopping areas have changed the physical landscape of the County. These physical changes are not the only forces reshaping the County. A new economic dynamic is at work which will continue to shape the development of the County in the decade ahead.

There has been a restructuring of the metropolitan economy. Many economic activities once confined to the urban center are shifting to outlying county areas. One example of this is the outward shift of manufacturing jobs, while service jobs remain in the central areas.

Jefferson County is now a major population and employment center. Over the last decades, the County's economy has transformed from one based principally on farming, ranching and natural resource development to one based on retail trade, services and manufacturing. This transformation has produced an economy which is now more diverse in scope and larger in scale.

A threshold has been crossed. As a result Jefferson County can no longer be described as suburban, defined as subordinate to a larger, adjoining urban core. This changing relationship began to emerge in the 1980s and promises a new economic role for the County in the decade ahead.



An estimated 1.3 million U.S. households moved each year during the 1980s.

FOREWORD Jefferson County's future will be shaped by the ability of its residents and elected officials to address the opportunities and problems brought about by change. In order to do this, it is useful to examine significant economic and demographic changes during the last decade.



The purpose of the County Profile is to provide a portrait of the County's residents and economy as well as its changing role as it relates to the metropolitan Denver area.

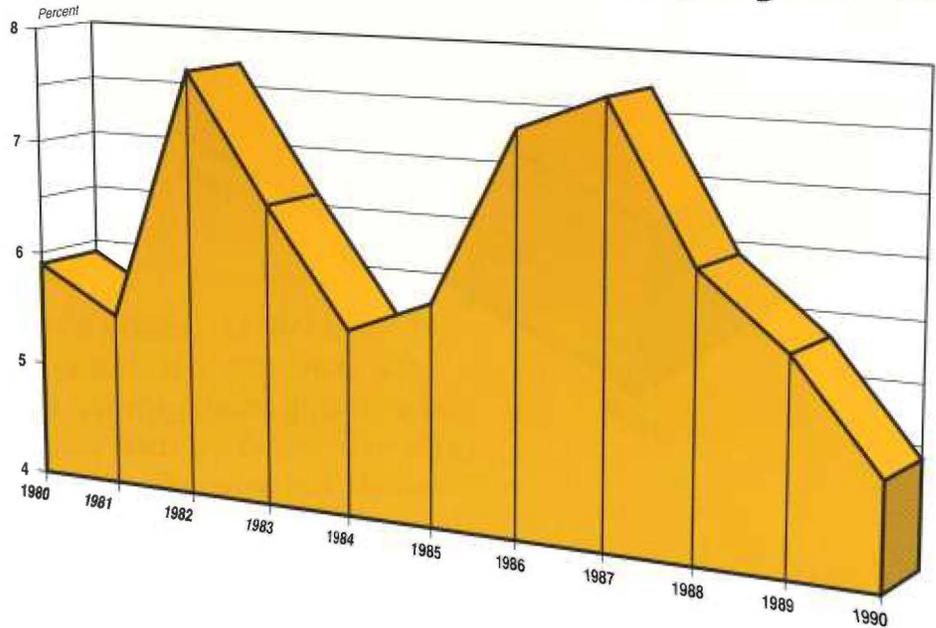
Much of the information contained in this document applies to the total County. However, Jefferson County is demographically diverse and growing more diverse each year. As new data become available through the 1990 Census, a more descriptive picture of Jefferson County will emerge.

NATIONAL POPULATION SHIFTS The decade of the 1980s was an era of growth and decline for the national economy. The population shifts that became apparent in the late 1960s continued, drawing more people from the industrial northeast to the southern and western areas of the United States. The reason for this shift was employment opportunity - people following jobs and encouraging further economic growth in those resettled areas. It has been estimated that 1.3 million households moved each year during the 1980s for job-related purposes.

Colorado was among the fastest growing states in the nation between 1960 and 1985.

POPULATION GROWTH IN COLORADO This national shift in population was an essential ingredient in State growth between 1960 and 1985, when Colorado was among the fastest growing states in the nation. Following the pattern of the 1960s and 1970s, Colorado continued its economic expansion into the early 1980s. The growth pattern of the 1980s was, however, punctuated by two recessionary downturns - the first in 1982-1983 and the second, in 1985-1986. The last recessionary period had far-reaching effects and only now is the state beginning to recover.

Average Annual State Unemployment



ANNUALIZED RESIDENT LABOR FORCE ESTIMATES

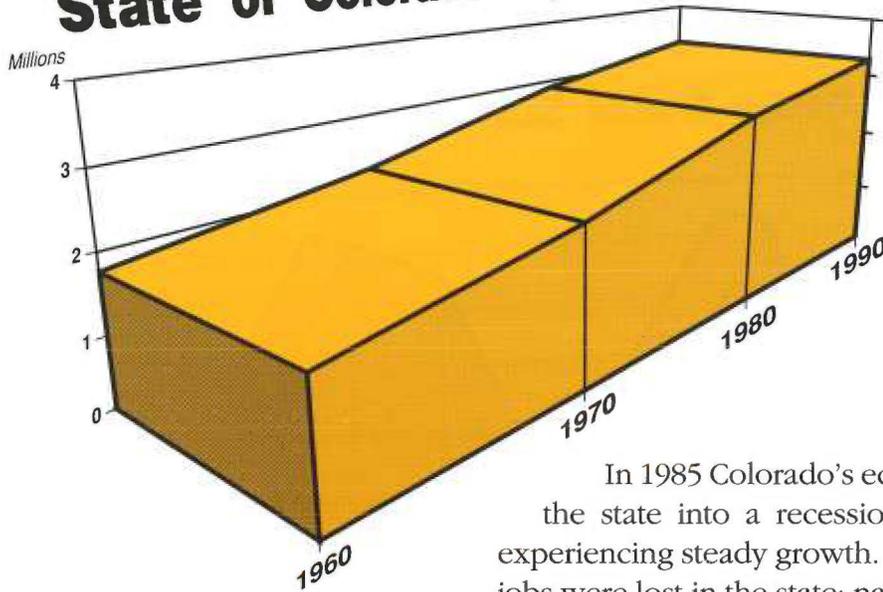
STATE OF COLORADO 1980-1990

	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
Labor Force in Millions	1.500	1.538	1.588	1.669	1.714	1.720	1.696	1.695	1.708	1.695	1.756
Average Annual Unemployment Rate in %	5.9	5.5	7.7	6.6	5.6	5.9	7.4	7.7	6.4	5.8	4.9

Source: Colorado Department of Labor and Employment

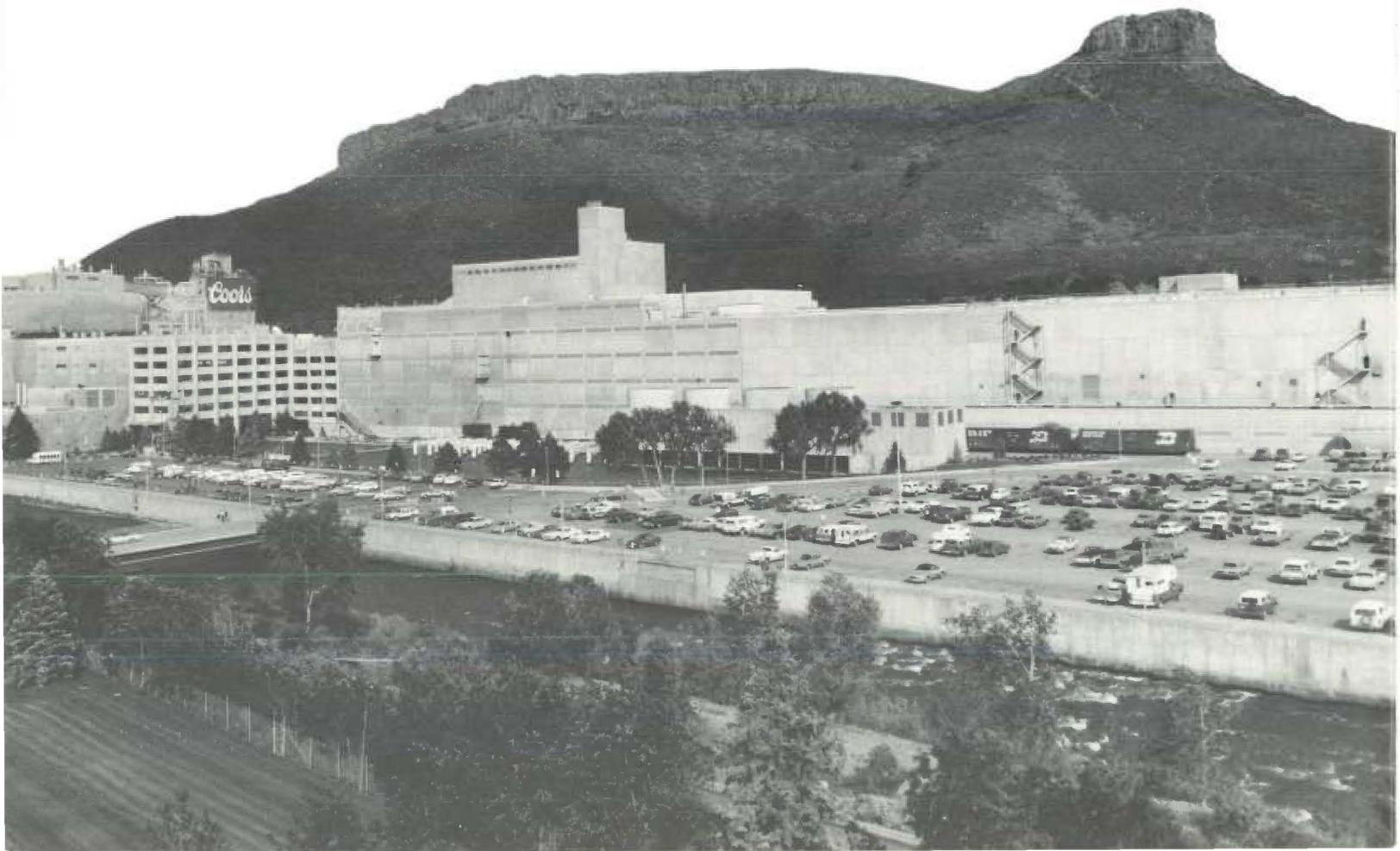
Colorado's population increased 14% from 2.9 million in 1980 to 3.3 million in 1990.

State of Colorado Population



During the 1980s Colorado's population increased 14%, from 2,889,735 million residents in 1980 to 3,294,394 million residents in 1990, a gain of 404,659 residents. In 1990 Colorado represented 1.3% of the nation's population and was the 26th largest state in the nation. Much of this growth occurred prior to 1985 when the state, for the first time in history, experienced net outmigration.

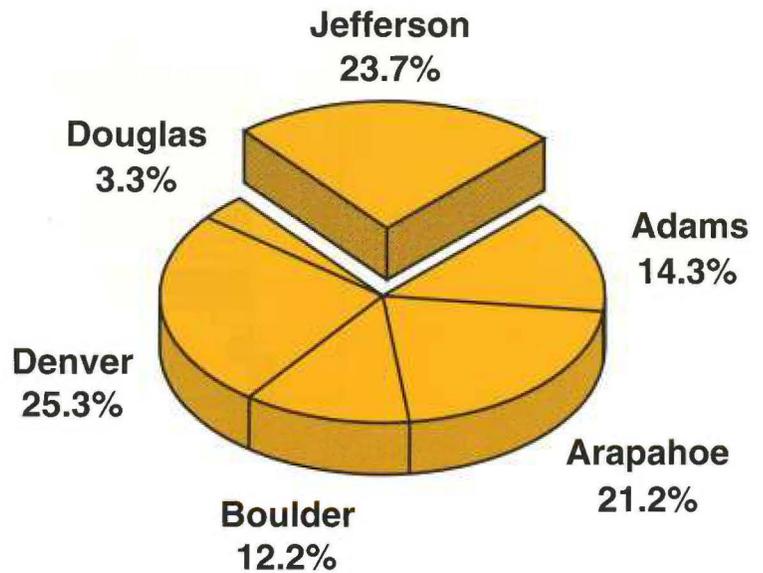
In 1985 Colorado's economy slowed dramatically, pushing the state into a recession when the national economy was experiencing steady growth. Between 1985 and 1987 nearly 6,000 jobs were lost in the state; nationally over 8 million new jobs were created. The state's significant job losses occurred in the manufacturing, construction and energy sectors.



The metropolitan area population increased 14% between 1980 and 1990, gaining 229,858 new residents.

THE METROPOLITAN AREA A trend emerged after World War II in which development pushed from the urban areas to the suburbs. Aided by the automobile and expanded road networks, this population shift accelerated in the 1970s. The shift continued through the 1980s at a slower rate. In the early 1980s much of the state's growth was concentrated in the Denver metropolitan area. Employment opportunities and a distinctive quality of life attracted residents to the area. Even with two recessionary periods and outmigration during the second half of the decade, the metropolitan area's population increased by 14% between 1980 and 1990, an increase of 229,858 new residents.

1990 Population Share



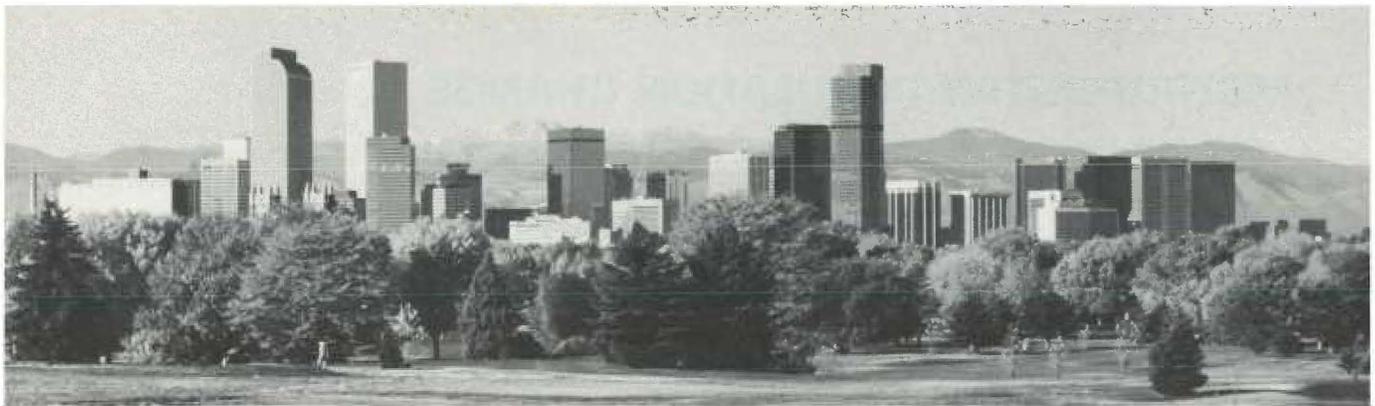
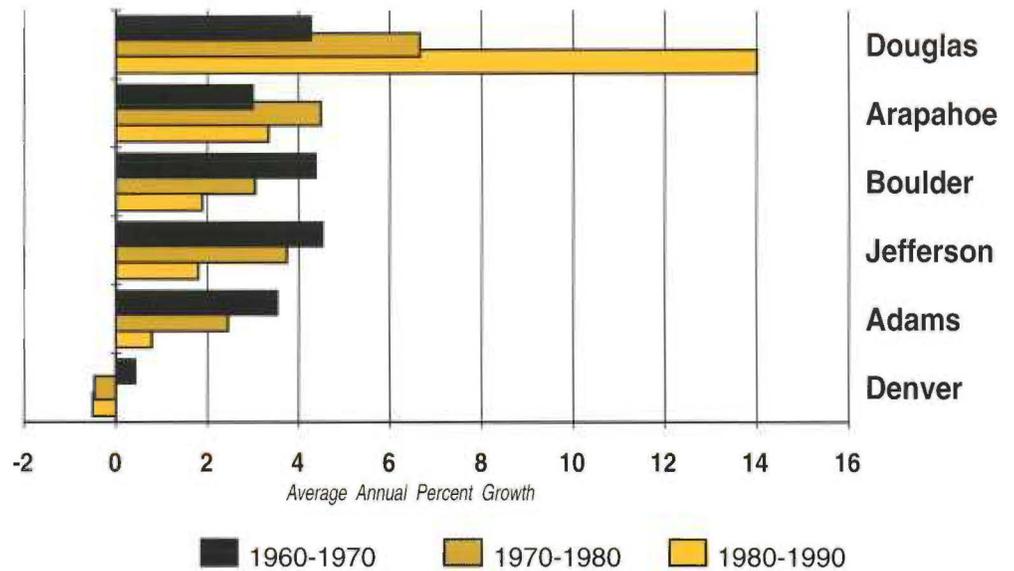
METROPOLITAN POPULATION CHANGE

County	1980	1990	Absolute Change	% Change	1980 % Metro Share	1990 % Metro Share	Average Annual % Change
Adams	245,944	265,038	19,094	7.8	15.2	14.3	0.8
Arapahoe	293,292	391,511	98,219	33.5	18.1	21.2	2.9
Boulder	189,625	225,339	35,714	18.8	11.7	12.2	1.7
Denver	492,694	467,610	-25,084	-5.1	30.4	25.3	-0.5
Douglas	25,153	60,391	35,238	140.1	1.6	3.3	9.2
Jefferson	371,753	438,430	66,677	17.9	23.0	23.7	1.7
Total	1,618,461	1,848,319	229,858	14.2	100.0	100.0	1.3
Colorado	2,889,735	3,294,394	404,659	14.0	100.0	100.0	1.3

Source: U.S. Census Bureau
Annual percent change is compounded based on a ten year time period.

Jefferson County remained the second most populated county in the state during the 1980s.

Metro County Population Growth



While the metropolitan region as a whole gained population, where people actually chose to live varied widely. As a result the outlying counties gained population while the urban center recorded losses. For instance, Denver County's share of the total metropolitan population dropped from 30% in 1980 to 25% in 1990. In contrast, outlying counties such as Jefferson and Arapahoe had population share increases.

New people moving into the region, combined with local residents relocating within the metropolitan area, produced variable rates of growth for the six counties in the Denver region between 1980 and 1990.

The County population began shifting back from cities to unincorporated areas.

DEMOGRAPHICS While Jefferson County experienced rapid population growth over the last three decades, growth was not uniform in the incorporated and unincorporated areas.

POPULATION GROWTH Although the total share of residents living in unincorporated areas dropped from 75% in 1960 to 31% in 1970, these areas did not actually lose population. Rather, the population was redistributed to cities through annexations and incorporations of populous areas.

During the 1980s the population began shifting back from suburban cities to unincorporated areas. By 1990 nearly 33% of County residents lived in unincorporated areas. A number of factors have contributed to this trend. First, the cities increasingly have become employment centers while unincorporated areas have been primarily residential. Second, since 88% of the County is unincorporated there is more developable land for growth than inside the cities. Third, mountain areas within unincorporated portions of the County have been growing at faster rates than the plains areas.

JEFFERSON COUNTY POPULATION TRENDS

	Unincorporated	Incorporated	Total	% Unincorporated	% Incorporated
1960	95,414	32,106	127,520	74.8	25.2
1970	48,491	186,877	235,368	20.6	79.4
1980	107,067	264,686	371,753	28.8	71.2
1990	142,138	296,292	438,430	32.4	67.6
2000	166,371	318,677	485,048	34.3	65.7

Source: U.S. Census Bureau, State Demographer, Jefferson County Planning Department

**By 1998 Jefferson County will become
the most populous county in the state.**

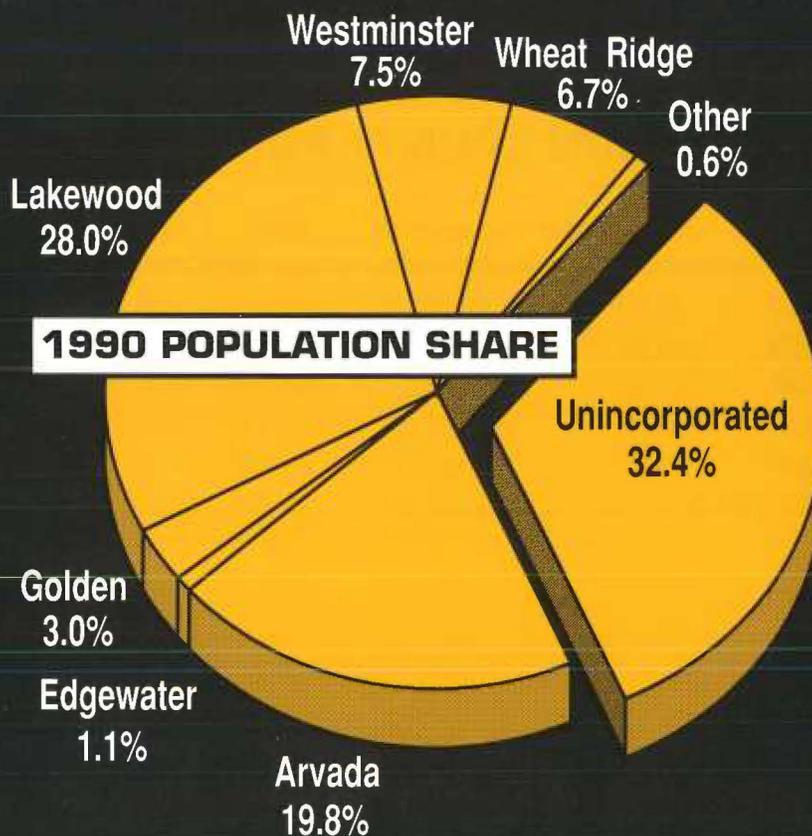
Between 1980 and 1990 the County's population increased 18% (1.7% annually), from 371,753 to 438,430. One-third of this growth was within unincorporated areas. By 1998 Jefferson County will become the most populous county in the state according to data from the State Demographer. By 2010 the County population is expected to increase to 522,220 residents, an average annual growth rate of .9%.

JEFFERSON COUNTY POPULATION & HOUSEHOLD ESTIMATES

Year	Total Population	Group Quarters	Household Population	Household Size	Total Households	Avg. Annual Growth Rate %
1980	371,753	5,532	366,221	2.82	129,778	
1990	438,430	6,482	431,948	2.59	166,545	2.5
2000	485,048	7,520	477,528	2.48	192,552	1.5
2010	522,220	9,025	513,195	2.35	218,381	1.3

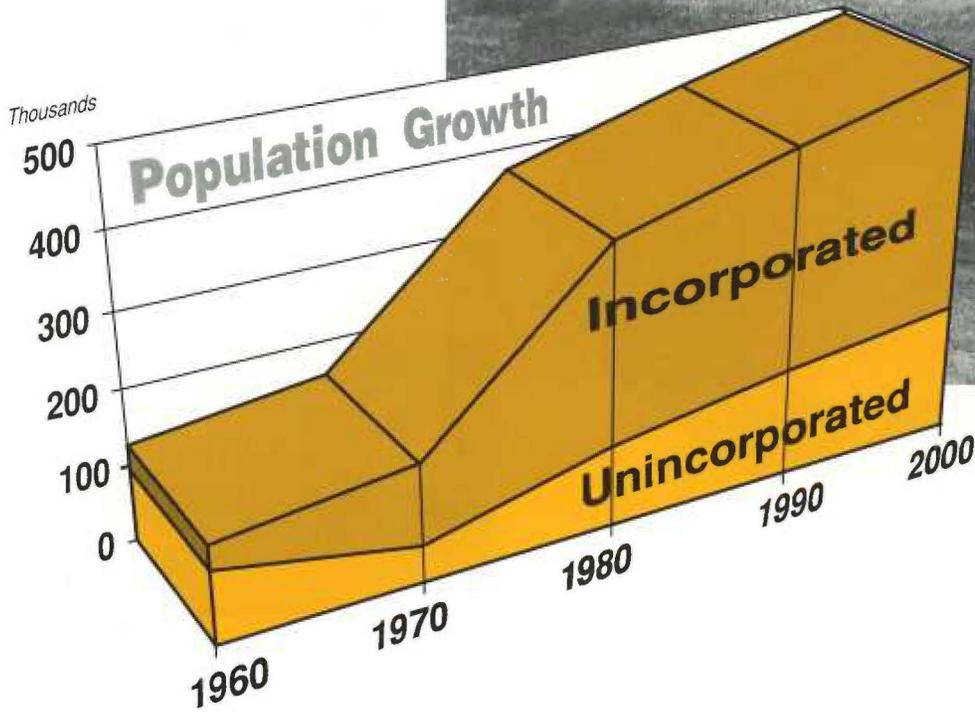
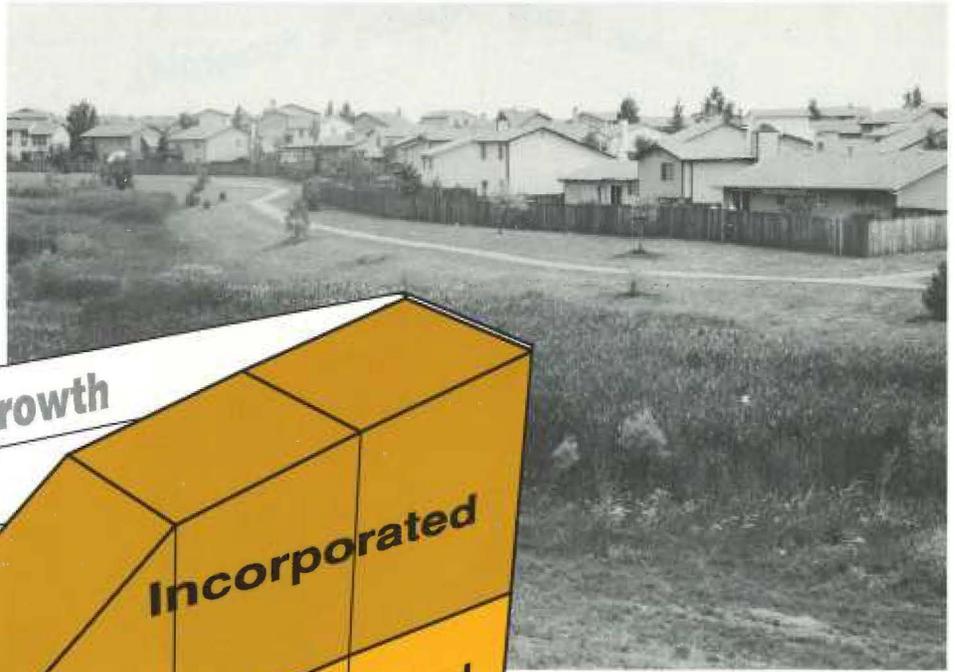
Source: 1980 and 1990 are from the U.S. Census. Population projections for 2000 and 2010 are from the State Demographer. Household size and group quarters for 2000 and 2010 were estimated by Jefferson County Planning Department. Due to rounding values may not be reproducible as shown.

CITY POPULATION GROWTH



Population growth in Jefferson County cities was moderate during the 1980s. Between 1980 and 1990 the cumulative population of the County's 12 cities grew 14%, from 318,632 to 364,007, an annual average growth rate of 1.3%. The fastest growing city was Westminster with a 4.0% annual average growth rate. Broomfield was second with 1.7%. Westminster had the greatest actual increase of 24,414 residents and Lakewood was second with a gain of 12,673 residents.

Six cities had population losses: Bow Mar, Edgewater, Lakeside, Morrison, Mountain View and Wheat Ridge. These losses were



small, 1,158, and represented a fraction of the total population.

Lakewood was the largest city in terms of population and land area. In 1990 Lakewood had 126,481 residents within 41.9 square miles. Arvada was the second largest city with 89,235 residents within 21.5 square miles.

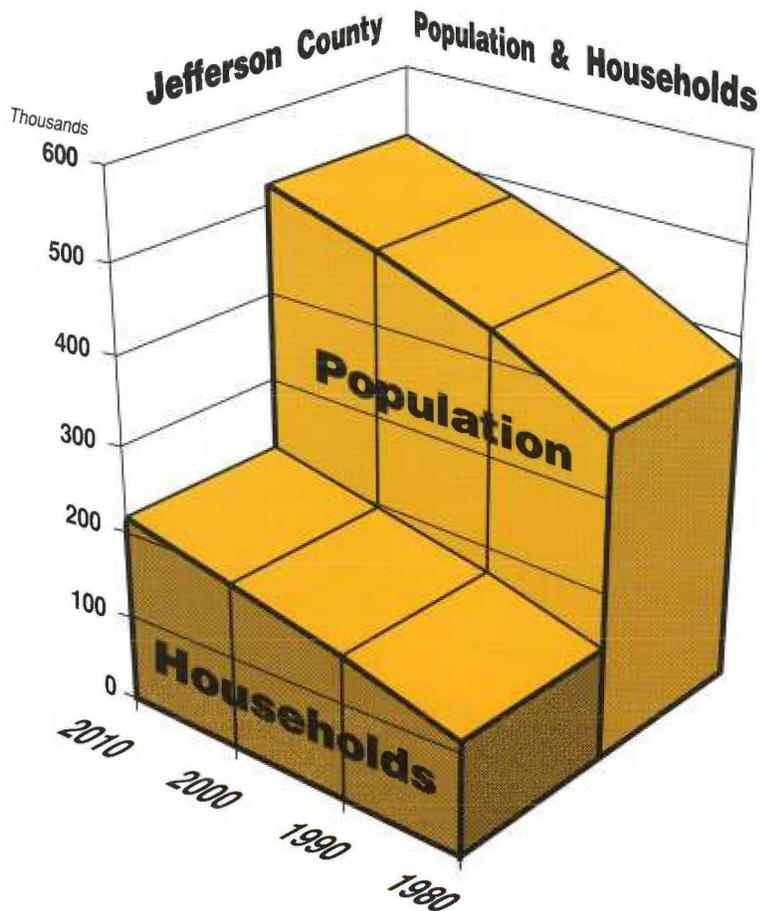
In 1990 68% of the total County population resided within incorporated areas and accounted for 12% of the total County land area.

	1980 City Pop.	1990 City Pop.	Absolute Change	% Change	1980-1990 Avg. Annual Growth Rate %	*County Square Miles	*1990 County Pop.
Arvada	84,576	89,235	4,659	5.5%	0.5	21.5	86,888
Bow Mar	930	854	-76	-8.2%	-0.8	0.2	241
Broomfield	20,730	24,638	3,908	18.9%	1.7	3.1	1,522
Edgewater	4,766	4,613	-153	-3.2%	-0.3	0.7	4,613
Golden	12,237	13,116	879	7.2%	0.7	7.5	13,116
Lakeside	19	11	-8	-42.1%	-5.3	0.2	11
Lakewood	113,808	126,481	12,673	11.1%	1.1	41.9	126,481
Morrison	478	465	-13	-2.7%	-0.3	1.1	465
Mountain View	584	550	-34	-5.8%	-0.6	0.1	550
Superior	208	255	47	22.6	N/A	0.5	0
Westminster	50,211	74,625	24,414	48.6%	4.0	11.2	32,986
Wheat Ridge	30,293	29,419	-874	-2.9%	-0.3	9.0	29,419
Cities Total	318,632	364,007	45,375	14.2%	1.3	N/A	296,292
Unincorporated	107,067	142,138	35,071	32.8%	2.9	680.1	142,138
Total						777.1	438,430

Source: Jefferson County Planning Department, April, 1990

Population in cities include all residents within the city boundaries

* Jefferson County portion only



The number of households will increase at a faster annual rate of 1.4% because of the increase in the number of households headed by singles and a decrease in the household size, from 2.59 in 1990 to 2.35 in 2010. Population in group quarters is expected to increase as more aging residents choose community housing alternatives.



UNINCORPORATED JEFFERSON COUNTY

Despite strong growth in the 1970s and 1980s, unincorporated Jefferson County has maintained a single family character. Of the 178,611 houses in Jefferson County 54,455, or 30% were in unincorporated areas. Of those, 82% were single family and 16% were multifamily. One-fourth of the County's mobile homes (761) was in unincorporated areas. Based on current zonings an additional 58,059 single family and 36,881 multifamily units could be built in unincorporated Jefferson County.

1990 Land Use	Existing	Zoned	Buildout
Single Family	44,747	102,806	58,059
Multifamily	8,947	45,828	36,881
Mobile Homes	761	659	-102
Total Residential	54,455	149,293	94,838
Retail	6,430,107	21,025,000	14,594,893
Office	4,944,497	23,000,000	18,055,503
Office/Retail	248,014	6,310,550	6,062,536
Industrial	7,374,703	49,000,000	41,625,297
Office/Industrial	17,800	3,590,686	3,572,886
Total Nonresidential	19,015,121	102,926,236	83,911,115

Source: Jefferson County Planning Department

During the 1980s nonresidential space nearly doubled in the unincorporated areas. In 1990 there were over 19 million square feet. Of this approximately 6,430,000 square feet were retail, 4,945,000 square feet were office and 248,014 square feet were office/retail mix. Industrial was the largest land use, totalling 7,393,000 square feet. Based on current zonings an additional 84 million square feet of office, retail and industrial space could be developed in unincorporated Jefferson County.

One of the most important trends of the 1990s will be the aging of the baby boomer population.

AN AGING POPULATION One of the most important trends emerging in the 1990s will be the aging of the baby boomers. This age group, born between 1945 and 1964, represented 43% of the County population in 1990. As this segment of the population grows older, the types of services needed and the way these services are provided will be affected dramatically. In 1990 13% of Jefferson County's population was over 60 years of age, and by 2010 this age group will double. This will be a 102% increase and account for 22% of the County population.

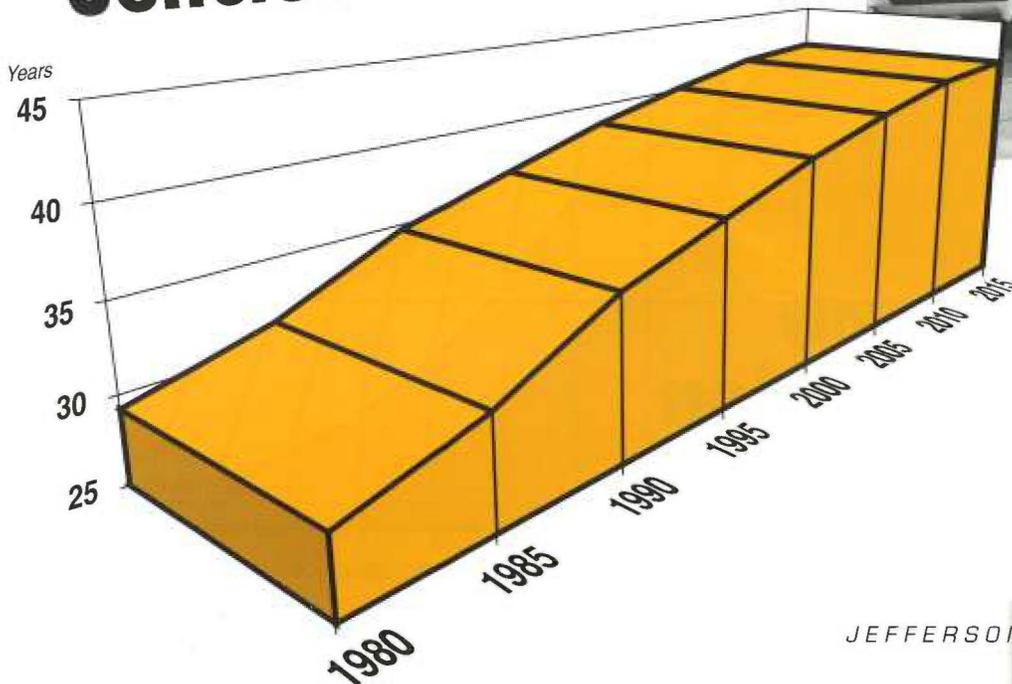
The aging of the County population is reflected in the median age profile. By the end of 1990 the median age of County residents was 34.7, up 5 1/2 years from 29.2 in 1980. This compares with a 1990 median age of 33.4 for the Denver region, up 4.5 years from 28.9 in 1980.

IMPLICATIONS

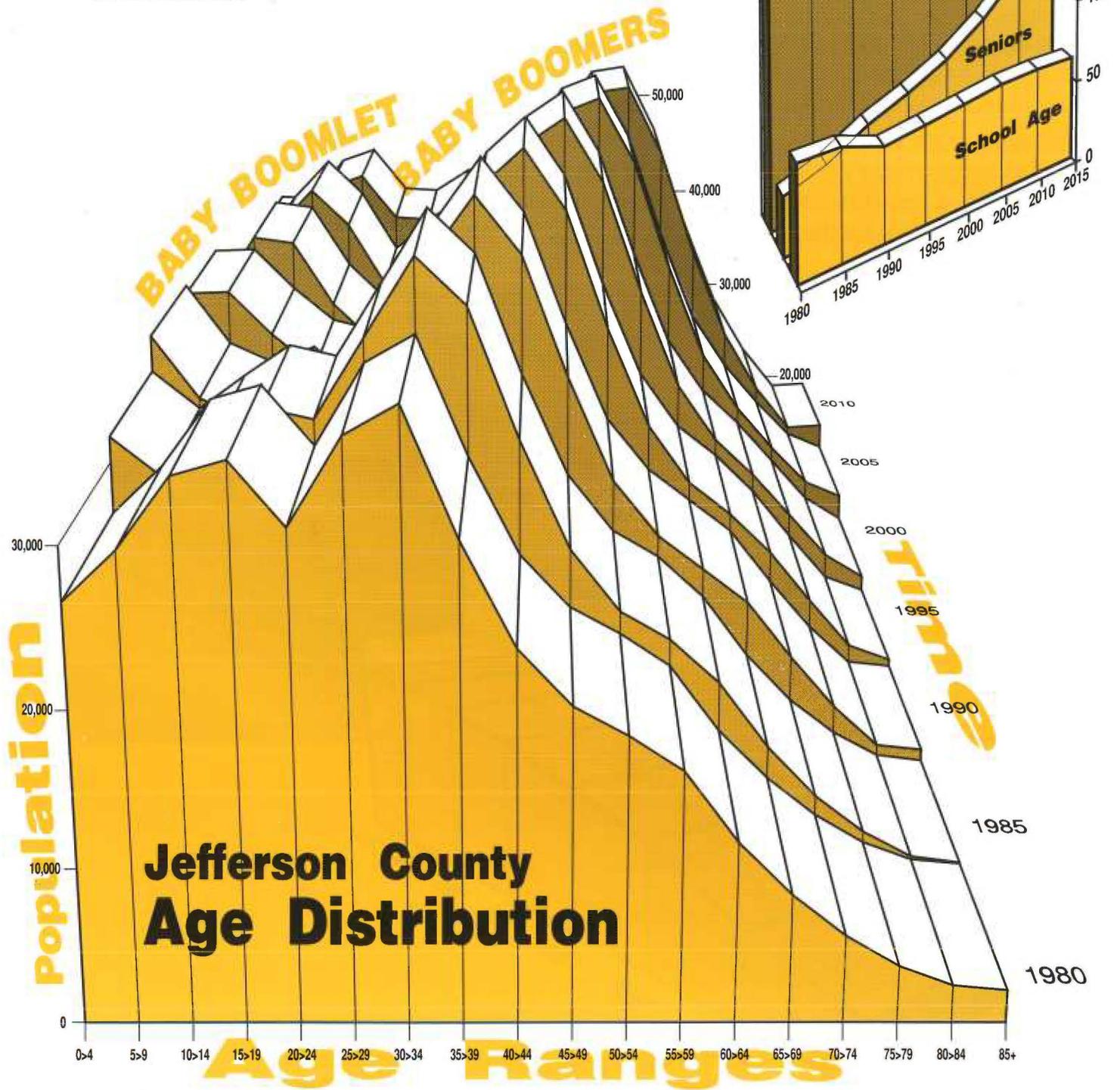
Aging residents are choosing to reside in the same place longer, creating a new sense of permanence. Stable residents will have higher expectations regarding the quality of community life, the availability of shopping and the level of public services and facilities. If services are not provided the stability of neighborhoods could be affected.



Jefferson County Median Age



The chart below illustrates the changing age distribution of County residents over the next two decades. The peaks for the “baby boomlet” and the aging “baby boomers” stand out clearly. By 2010 the largest share of the population (over 50,000 residents) will be between 50 and 59 years of age. The chart at the right shows that as the number of seniors (aged 60 and over) increases, the school age population will begin to level off and the working age population (18-59 age group) will actually begin to decline during the next decade.



The median age of County residents increased 5 1/2 years, to 34.9.

As the population of the County ages there will be a shift away from services for younger residents to services for older residents. This will affect many dimensions of community life: shopping, transportation and education.

With emphasis being placed on the burgeoning growth in the number of seniors in the next decade, it might appear that the number of young children will decline. In fact there has been an increase in the number of births, particularly to older mothers, which has created a "baby boomlet". While it is true that the number of children under age 19 will represent a smaller share of the total population by 2010, down from 43% to 35%, there will still be a need for schools, services and housing for families with children. The impact of the "baby boomlet," which began tapering off in the late 1980s, is beginning to register at the elementary school level. By the 1994-1995 school year, enrollments are expected to increase by over 3,500 students, with 2,100 at the elementary level.

The older areas of the County, Lakewood, Wheat Ridge, and Edgewater, are aging more quickly and school enrollments in these older, more urban areas are decreasing. Therefore the need for increased school capacity is shifting from central and west portions of the County to newly developing areas of north and south Jefferson County. By 1995 48% of all new students will be in the south area and 27% will be in the north area.

IMPLICATIONS

Underused schools in aging neighborhoods of the County may need to be converted to alternative uses such as senior centers, health facilities or housing to meet the needs of older residents.

The growing school age population is depleting funding resources and exceeding school enrollment capacities in developing areas. To help alleviate these burdens, alternatives should be explored. Some solutions may include the reuse of schools in older areas as magnet schools, assessment of impact fees to developers in new areas and redrawing district boundaries to more closely align the direct costs of education with the recipients of the services.

EDUCATION

	R-1 School Enrollment	% Change
1960	32,604	
1970	66,576	104.2
1980	78,138	17.4
1990	75,395	-3.5
1995	78,939	4.7

Source: Jefferson County Public Schools, 1990 Annual Student Housing Report

The Jefferson County R-1 School District was one of the first in the country to develop a program where local businesses work with students in preparation for careers.

The R-1 School District, with a 1990 school enrollment of 75,164, is working with local companies to ensure that the County employment base will be qualified and well educated in the future. Business, civic and community leaders joined together to develop Education 2000, a program whose primary goal is to expose all students to career options through partnerships with private businesses and organizations.

In addition to excellent schools, advanced education is offered at three local colleges: Colorado School of Mines, Front Range Community College and Red Rocks Community College. Since 1986 combined enrollments at the two community colleges have increased 61%, from 9,301 to 14,954. The School of Mines had 2,486 students enrolled in 1990.

Jefferson County is no longer suburban in the traditional sense and is now a major population and employment center.

JEFFERSON COUNTY ECONOMY

Since 1960 Jefferson County has transformed from a mining and agricultural area to a mosaic of residential areas with a rapidly expanding economic base.

Beginning with a population of about 127,000 in 1960, Jefferson County grew 4.2% annually to over 438,430 in 1990. During the 1980s Jefferson County remained the second most populated county in the State, eclipsed only by Denver County.

While growth in the metropolitan area was a result of expanding employment opportunities, Jefferson County's post-1960s growth

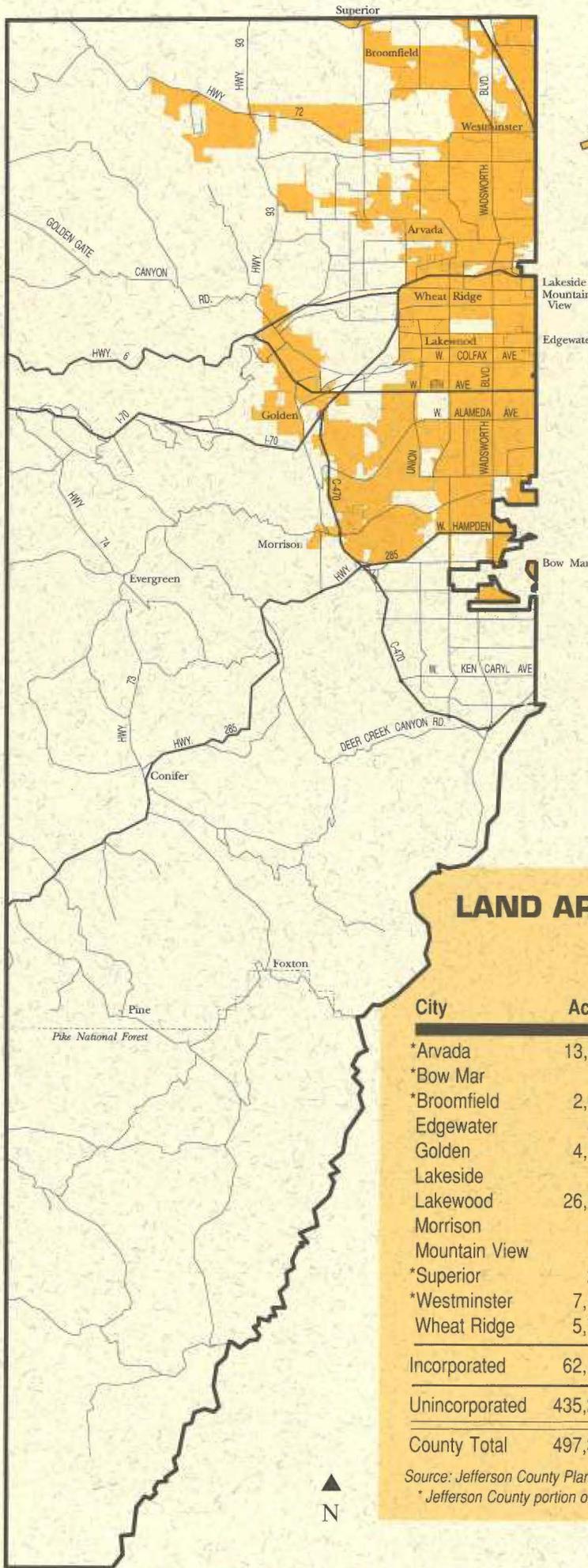
spurt was the result of residential development. Much of the County's residential development can be attributed to the automobile, which made it possible for residents to live in the suburbs and commute to work in the metropolitan area.

The influx of new residents to the County was fueled by a variety of socio-economic and cultural factors, resulting in the development of large, predominately single family neighborhoods. With unbounded mobility, residents could choose to live in areas which

provided a good balance of access to work with the more personal interests of family life, schooling and quality of life.

Over time these large residential areas were served by consumer oriented retail and service land uses. To some degree these new residential and economic activities were built around preexisting manufacturing hubs. Many residential areas centered around the Federal Center in central Jefferson County, Martin Marietta to the south, Rocky Flats to the north and Coors to the west. Since 1960 public investment in roadway improvements and other forms of infrastructure have helped to stimulate further industrial development in these areas, particularly along the Clear Creek/I-70 corridor and Highway 36 to Boulder.





PROFILE

JEFFERSON COUNTY

Road Miles in Unincorporated Area.....1,344

Road Miles in Incorporated Area.....1,098

Total Lane Miles in Unincorporated Area.....3,822

% County Land Area in the Mountains.....72

Incorporated..... 
 Unincorporated..... 

LAND AREA DISTRIBUTION

City	Acreage	Square Miles	% County Total	1990 Population
*Arvada	13,760.5	21.5	2.8	86,888
*Bow Mar	155.5	0.2	0.0	241
*Broomfield	2,008.5	3.1	0.4	1,522
Edgewater	435.8	0.7	0.1	4,613
Golden	4,771.7	7.5	1.0	13,116
Lakeside	159.2	0.2	0.0	11
Lakewood	26,791.6	41.9	5.4	126,481
Morrison	728.4	1.1	0.1	465
Mountain View	59.6	0.1	0.0	550
*Superior	288.3	0.5	0.1	0
*Westminster	7,194.7	11.2	1.4	32,986
Wheat Ridge	5,761.2	9.0	1.2	29,419
Incorporated	62,114.8	97.1	12.5	296,292
Unincorporated	435,259.5	680.1	87.5	142,138
County Total	497,374.3	777.1	100.0	438,430

Source: Jefferson County Planning Department April 19, 1990, U.S. Census Bureau
 * Jefferson County portion only

PROFILE

JEFFERSON COUNTY

JOBS

From 1980 to 1990 the employment base of the County grew significantly.

1980 Total Number of Jobs 116,932

During the 1980s

- Jefferson County captured over 30% of the metropolitan area's employment growth
- the employment base expanded at an annual average rate of 3.7% and experienced major growth in the services and retail sectors

1990 Total Number of Jobs 159,423

By 1990

- 17% of the jobs in the metropolitan region were in Jefferson County
- the employment base had increased by over 42,000 jobs since 1980

FORECASTS 2000 - 241,500, 2010 - 281,400

- over 98,000 new jobs will be created in the County
- services will be the largest employment sector with over 58,000 jobs.

POPULATION

The Jefferson County population continued to grow over the course of the decade. By 1998 Jefferson County is projected to become the most populous county in the state.

1980 Total Population 371,753

During the 1980s

- 29% of the total metropolitan growth was in Jefferson County
- the population grew at an annual average growth rate of 1.7%
- the County reinforced its position as the second most populous county in the state

1990 Total Population 438,430

By 1990

- 24% of the metropolitan area's population resided in Jefferson County
- the population increased 18% from 1980

FORECASTS 2000 - 485,048, 2010 - 522,220

By 2010

- the average annual population growth rate will slow to 9%

INCOME

During the 1980s household income for County residents increased at a rate greater than inflation.

1980 Median Household Income - \$26,590, Per Capita Income - \$10,592

During the 1980s

- the average wage for workers employed in Jefferson County outpaced inflation by 7%
- rising wages helped increase per capita retail sales in the County from \$7,215 in 1980 to \$11,396 in 1990

1990 Median Household Income - \$43,679, Per Capita Income - \$17,693

By 1990

- the average wage for workers employed in the County had risen to \$25,733
- rising incomes helped stimulate a rebound in the single family housing market when the number of home sales rose from 4,813 in 1980 to 5,801 in 1990
- median household income had grown 6% in real terms

DEMOGRAPHICS

One of the major forces which will be shaping Jefferson County in the 1990s will be its aging population.

1980 Median Age - 29.2

During the 1980s

- the population grew older with the median age increasing 5 1/2 years
- there was a baby boomlet caused by an increase in the number of births, particularly to older mothers

1990 Median Age - 34.7

By 1990

- Baby boomers represented 43% of the County population
- 15% of County residents was over 60 years old
- the number of residents living in group quarters increased 17%

FORECASTS 2000 - 38.7, 2010 - 41.4

By 2010

- the median age will increase by over 6 years to 41.4
- the over 60 age group will nearly double and represent 22% of the County population

HOUSING

During the 1980s the County housing market struggled through high vacancy and foreclosure rates and fluctuating mortgage rates before emerging into a healthier, more stable market in 1990.

1980 Total Housing Units - 137,327, Average Single Family Resale Price - \$75,417

During the 1980s

- the average price of a single family resale home increased 41%
- residential foreclosures reached a decade high of 3,765 in 1988 and began to decline in 1989
- demand for high-end homes in the mountain areas created a boom for homes priced over \$250,000
- the total number of housing units in the County increased 30%
- apartment vacancy rates reached a high of 13% in late 1986 before beginning to decline.

1990 Total Housing Units - 178,611, Average Single Family Resale Price - \$106,222

By 1990

- single family resale homes were more affordable than at any other time during the decade due to higher incomes, lower mortgage rates and reduced real estate values
- residential foreclosures were at the lowest level since 1985
- the County housing market was comprised of 75% single family, 23% multifamily and 1.7% mobile homes
- apartment vacancy rates were 5.5%, the lowest level since 1983

HOUSEHOLDS

The number of households in the County increased over the decade and changing demographics began to reshape the size and types of households being formed.

1980 Total Households - 129,778, Household Size - 2.83

During the 1980s

- the number of traditional households, defined as a married couple with or without children, decreased while the number of nontraditional households increased
- the number of persons per household continued to shrink

1990 Total Households - 166,545, Household Size - 2.59

By 1990

- the number of households grew 28% while the number of residents living in group quarters grew 17%
- the average household size decreased by 8% or .23 persons per household

FORECASTS 2000 - 192,552 Number, 2.48 Size, 2010 - 218,381 Number, 2.35 Size

By 2010

- the number of households will increase as the household size continues to shrink

LABOR FORCE

The County labor force grew during the 1980s despite a significant mid-decade economic downturn.

1980 Labor Force - 201,361

During the 1980s

- the labor force grew at an annual average rate of 1.6%
- the labor force was buffeted by two economic downturns which resulted in temporarily high rates of unemployment
- the percentage of female residents participating in the labor force continued to grow

FORECASTS 2000 - 284,332, 2010 - 306,157

By 2010

- labor force participation rates will increase and approximately 59% of County residents will be in the work force
- the percentage of females in the labor force will have peaked at 63% during the 1990s and will decline to 60%

1990 Labor Force - 236,528

By 1990

- 23% of the metropolitan areas' labor force was from Jefferson County
- the County had generally recovered from the mid-decade recession and had a decade low unemployment rate of 4.0%
- about 54% of the County's residents was in the labor force, contributing to the County's high household income

NONRESIDENTIAL

The 1980s brought significant nonresidential growth to the County, particularly in the retail sector.

1980 12,000,000 Sq. Ft. Unincorporated

During the 1980s

- Nonresidential space in unincorporated areas of the County increased 67%
- Retail became the largest land use and the County's largest source of sales tax revenues

1990 - 21,000,000 Sq. Ft., Unincorporated, 60,000,000 Sq. Ft. est. Total County

By 1990

- the County had an estimated 21 million square feet of retail space, of which 6.5 million square feet were in unincorporated areas
- there were 42 square feet of retail space per capita in Jefferson County compared to 30 square feet per capita in the metropolitan area
- there were over 10 million square feet of office space in the County, about 5 million of which was located in unincorporated areas
- the County had an estimated 30 million square feet of industrial space, 7.4 million square feet of which was located in unincorporated areas

FORECASTS Nonresidential Needs Total County

2000 - 14,755,550 Sq. Ft., 2010 - 11,405,000 Sq. Ft.

By 2010

- an additional 26 million square feet of office, retail and industrial development will be required to meet job growth demands
- the number of service sector jobs will have the largest actual growth, increasing the demand for office space

PROFILE

JEFFERSON COUNTY

The Jefferson County Profile is a socio-economic study of Jefferson County focusing on key demographic, economic and development trends.

The following publications are also available from the Jefferson County Planning Department:

COMMUNITY PROFILE REPORTS Socio-economic studies of the County Planning Areas which cover demographics, economics and land use.

South Jefferson County
Northeast Jefferson County
Jefferson County Mountains (late 1992)

ECONOMIC INDICATORS Biannual reports focusing on economic events and trends in Jefferson County.

LAND USE INVENTORY A relational database containing existing and potential land use information for unincorporated Jefferson County.

Conifer & Vicinity
Evergreen & Vicinity
Northeast Jefferson County
Conifer-285 Corridor Area Community Plan
South Jefferson County Community Plan
North-Central Mountains

COMMUNITY PLANS A guide for land use decisions within the Planning Areas.

Golden/Ralston Comprehensive Plan
Evergreen Area Community Plan
Jefferson County General Land Use Plan
Conifer-285 Corridor Area Community Plan
South Jefferson County Community Plan
North Plains Community Plan
North Mountains Community Plan (mid-late 1992)
Central Mountains Community Plan (mid-late 1992)

Board of Commissioners

Gary Laura
Betty Miller
John P. Stone, *Chairman*



Published January 1992, by the Jefferson County Planning and Zoning Department, 700 Jefferson County Parkway, Suite #220, Golden, CO 80401 Phone: (303)-271-5865

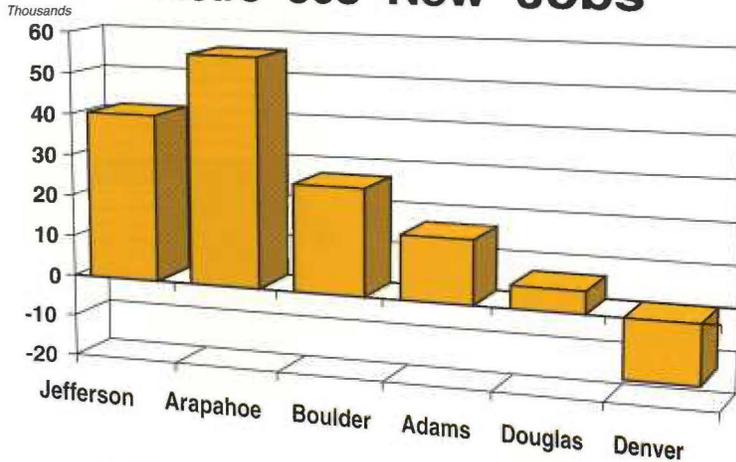
Reprinted April 1993

Jefferson County gained over 40,000 new jobs during the decade.

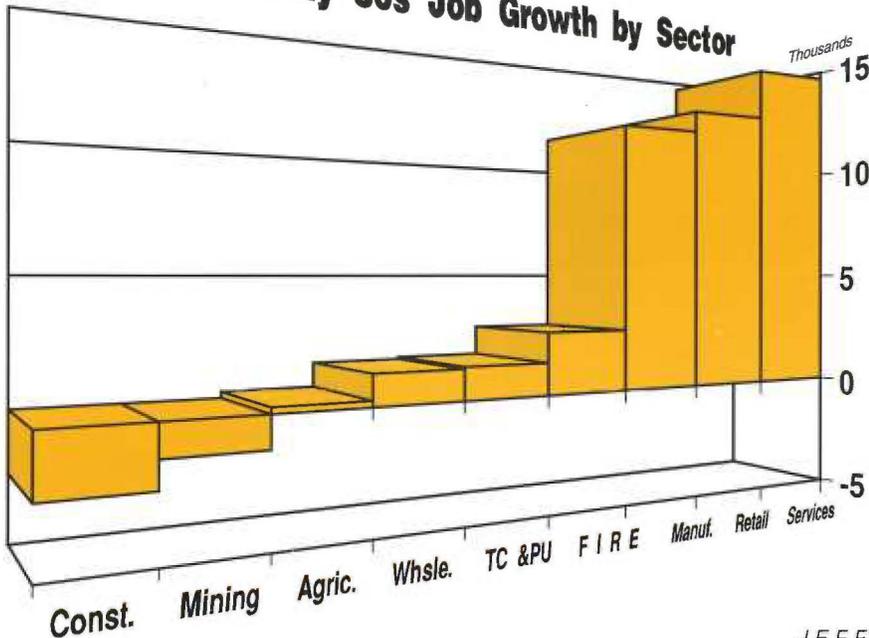
EMPLOYMENT During the 1980s the shift of employment centers to the suburbs continued. Denver County lost jobs in all but two sectors, transportation and services, while Jefferson County gained jobs in all but two sectors, mining and construction. All of the outlying metropolitan area counties added jobs between 1980 and 1989, many at the expense of the core city.

Manufacturing, which historically had been urban-based, was drawn to the suburbs by the availability of large tracts of undeveloped land, lower land costs, lower tax rates, and proximity to educated labor pools. Of the 16,000 jobs lost by Denver County during the 1980s, over 14,000 were in manufacturing. During that same decade Jefferson County gained over 40,000 jobs, 11,500 in the manufacturing sector. Much of this growth occurred between 1980 and 1985 when total County employment increased 21%. While there were intercounty shifts in manufacturing employment, it should be noted that the actual gain in manufacturing jobs in the metropolitan region for the decade totalled only 1,910.

Metro 80s New Jobs

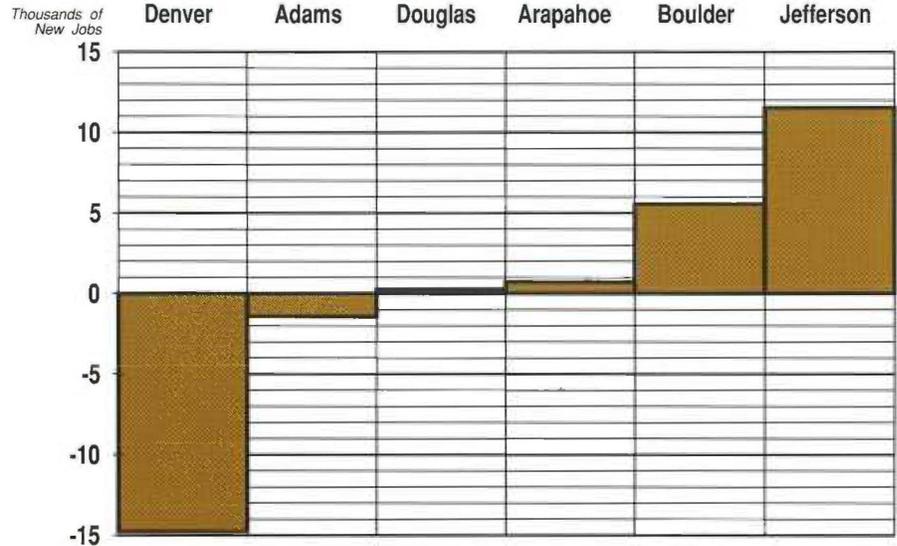


Jefferson County 80s Job Growth by Sector



The manufacturing sector gained over 11,500 jobs during the 1980s.

Decade Growth in Manufacturing Employment



MAJOR EMPLOYERS IN JEFFERSON COUNTY

A diverse group of employers is located in Jefferson County which adds stability to its economic base. Some of the state's largest employers are headquartered or have major operations in the County. In 1990 employers with the largest number of employees in Jefferson County included the Federal Government with 13,000 employees, Martin Marietta with 9,500, the R-1 School District with 8,470, Adolph Coors with 6,472 and EG&G at Rocky Flats with 6,270.

Employer	Business Activity	Employed in County
Federal Government	Federal Government	13,000
Martin Marietta	Astronautics	9,500
R-1 School District	Public Education	8,471
Adolph Coors	Beverages/Ceramics	6,472
EG&G-Rocky Flats	Defense Components	6,272
Jefferson County	County Government	2,175
Lutheran Medical Center	Hospital	2,000
Cobe Laboratories	Medical Equipment	1,820
Ball Corporation	Aerospace/packaging	1,282
Merrill Lynch	Brokerage	650
National Renewable Energy Lab (formerly SERI)	Energy Research	450-500

Note: This list is believed to be complete and accurate as of December 1990, but may not include every business in Jefferson County with 500 employees or more. The number of employees in each company is subject to change.

Source: Jefferson County Planning Department

**Wage and salary jobs in the County rose 36%
between 1980 and 1989.**

While manufacturing jobs shifted rather than increased in the metropolitan area, the consumer oriented sectors, including retail and services, recorded significant gains in the number of jobs created during the decade. In the metropolitan area, over 108,000 jobs were added in these sectors, with over 27,000 or 25% of those jobs in Jefferson County alone.

Overall the number of "wage and salary" jobs in Jefferson County rose 36% between 1980 and 1989, and job growth varied by sector. For example, the services, retail and manufacturing sectors posted gains in employment while the construction sector declined from a peak of 12,007 in 1984 to 6,405 in 1989.

**SUMMARY OF CHANGES IN METRO EMPLOYMENT
1980 - 1989**

	Jefferson	Denver	Arapahoe	Boulder	Adams	Douglas	Absolute Change
Construction	-2,379	-5,996	-2,050	-407	-820	387	-11,265
Mining	-1,292	-3,629	-190	-53	-409	41	-5,532
Agriculture	252	-257	121	430	359	113	1,018
Wholesale Trade	1,279	-4,657	5,113	1,166	1,375	189	4,465
TC&PU *	1,368	4,446	5,271	294	4,768	237	16,384
FIRE *	2,629	-2,186	10,464	1,166	347	512	12,932
Manufacturing	11,554	-14,764	718	5,564	-1,433	271	1,910
Retail Trade	12,459	-6,969	11,710	6,436	4,638	1,977	30,251
Services	14,678	19,601	24,428	11,323	6,693	1,722	78,445
Total Private	40,548	-14,411	55,585	25,919	15,518	5,449	128,608
Federal	755	1,085	-89	-280	636	36	2,143
State	732	-2,669	1,106	10,501	436	71	10,177
Local	456	-244	3,713	-7,742	271	1,114	-2,432
Total Government	1,943	-1,828	4,730	2,479	1,343	1,221	9,888
Total	42,491	-16,239	60,315	28,398	16,861	6,670	138,496

* TC&PU = Transportation, Communications and Public Utilities * FIRE = Finance, Insurance and Real Estate
Source : Colorado Department of Labor and Employment

The County lost higher paying jobs in the mining and construction sectors and gained lower paying jobs in retail and services.

IMPLICATIONS

A shift from higher paying energy, construction and manufacturing jobs toward lower paying retail and services jobs will add more economic stability and long term job growth. The shift will also mean less growth in average personal income. This trend will counterbalance the historic upscale trends in housing and retail markets and increase the demand for social services.

An increase in low paying jobs will mean that many workers who cannot afford to live in the County will commute from outside the area to fill these positions. The decrease in high paying jobs will encourage residents to commute outside the County to work. To retain the local labor force, strategies for providing affordable housing to lower wage workers and incentives for retaining higher wage earners should be developed.

The number of jobs in Jefferson County grew over the decade with the increases occurring in traditionally low paying sectors. While the County lost jobs in higher paying mining and construction sectors it gained lower paying jobs in retail and services. Mining, now the smallest sector in the County, had the highest average annual wage in 1989, \$46,468. Conversely, the largest job sector in the County, retail, had the lowest average annual wage, \$11,406. Offsetting the loss of high paying mining jobs was the gain in manufacturing jobs with annual wages averaging \$38,022. Although the manufacturing sector, the second largest in the County, was stable during the 1980s, instability in the national and global economies could impede growth during the 1990s.

There is a disparity between the changing employment base and the income of County residents. The household income of residents is high in relation to the number and type of low paying jobs located in the County. This implies that many jobs being created in the County are not filled by County residents.



By 1990 the County unemployment rate was at a decade low of 4.0%.

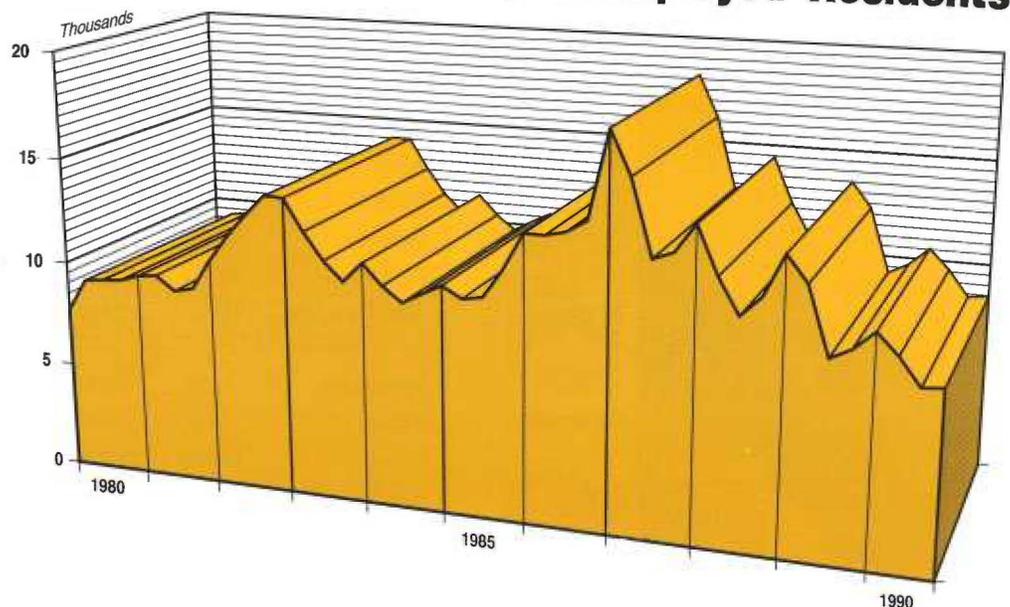
LABOR FORCE Jefferson County's labor force grew at an annual rate of 1.6% during the 1980s in spite of losses in construction and mining jobs. After a decade high of 239,663 workers in 1985, the County labor force began shrinking in response to the contraction of business activity brought about by the recession. And though the County did not experience outmigration, as did much of the metropolitan area, population growth slowed. By 1990 the unemployment rate was at a decade low of 4.0% and the labor force had regained most of its losses, averaging 236,528 workers.

The decade of the 1980s saw a continuation of the structural changes in the County economy, resulting in a shift toward service-based employment. Along with these structural changes the County labor force was changing as a result of increased participation by women and minorities in the workplace. An aging labor force will likely lead to a shortage of workers at entry level positions. Labor force shortages, locally and nationally, will create a highly competitive environment for workers and could lead to fewer restrictions on immigration into the United States in order to renew the lower paying ranks of the labor force.

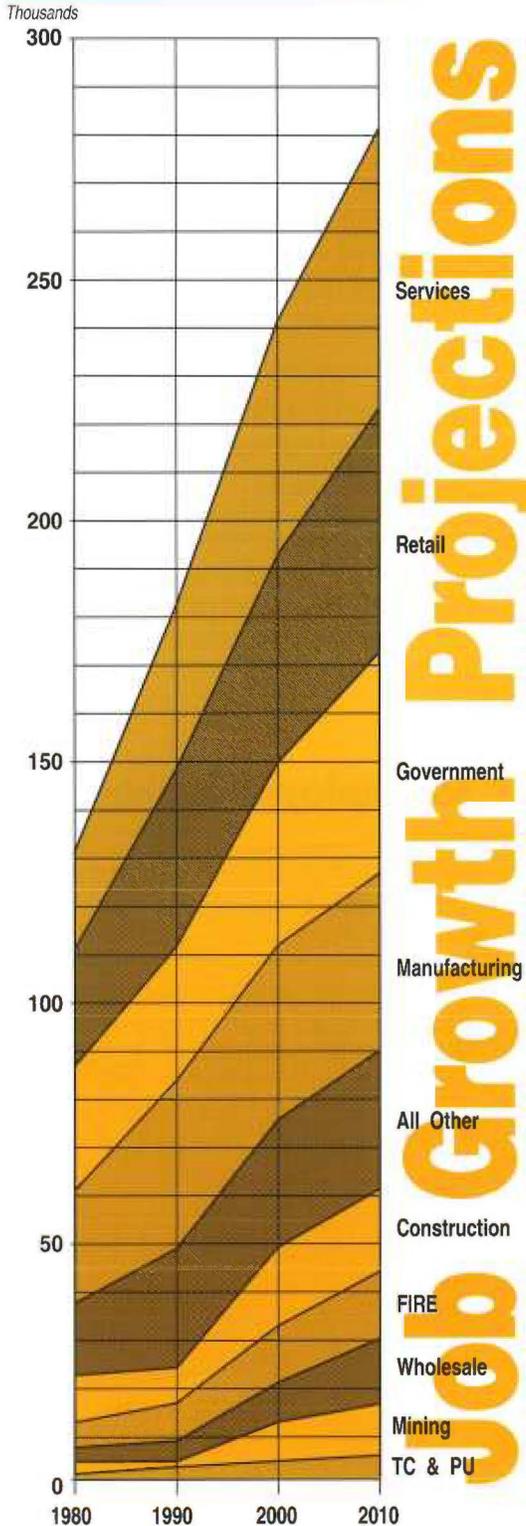
IMPLICATIONS

As a labor shortage develops, the need to recruit and retain female, minority and older workers will intensify. Employers will be challenged to provide more flexible benefits to attract and retain workers. Education, training and transportation will be essential in attracting minority and older workers.

Jefferson County Unemployed Residents



The number of jobs in the County will grow 54% by 2010, an increase of over 98,000 new jobs.



EMPLOYMENT GROWTH By 2010 Jefferson County will nearly complete its evolution from a goods-based economy to a service-based economy, thereby mirroring the changes in the national economy. Over the next two decades the number of jobs in the County is expected to grow 54% (or 2.1%) annually, for an increase of 98,777 new jobs. Services will be the largest sector with total employment of 58,000 by 2010, an increase of nearly 24,000 jobs. The retail sector will grow 1.6% annually, adding 13,862 jobs for a total of 50,700 jobs. The growing demand for sand and gravel and increased development will foster mining and construction gains of approximately 9,500 new jobs each. Advances in technology leading to increased productivity may mean slower growth in the manufacturing sector.

	1980	1989	2000	2010	1989-2010 Absolute Change	Average Annual % Change
Mining	2,456	1,168	8,100	10,600	9,432	11.1
Construction	9,674	7,295	16,300	17,100	9,805	4.1
Manufacturing	23,411	34,965	36,200	36,700	1,735	0.2
*TC & PU	2,474	3,841	5,000	6,200	2,359	2.3
Wholesale	2,951	4,230	8,200	13,600	9,370	5.7
Retail	24,379	36,838	43,000	50,700	13,862	1.5
*FIRE	5,226	7,855	11,700	13,900	6,045	2.8
Services	20,166	34,033	48,600	58,000	23,967	2.6
Government	25,780	27,723	37,900	45,800	18,077	2.4
Total Nonagric.	116,517	157,948	215,000	252,600	94,652	2.3
Agriculture	1,223	1,475	800	700	(775)	-3.5
Military	454	600	500	500	(100)	-0.9
All Other	13,296	22,600	25,200	27,600	5,000	1.0
Total Employment	131,490	182,623	241,500	281,400	98,777	2.1

Source: Data for 1980 and 1989 are from the Colorado Department of Labor & Employment. Military and All Other data are from DRCOG.

Jefferson County had more retail square feet per capita than any other metropolitan county.

NONRESIDENTIAL REAL ESTATE During the 1980s Jefferson County was able to reap the benefits of the region's population and economic growth, and maintain a balanced mix of residential and nonresidential development.

In 1980 a sample survey showed that there were approximately 12 million square feet of nonresidential space in unincorporated Jefferson County. By 1990 that amount had increased 67% to approximately 20 million square feet.

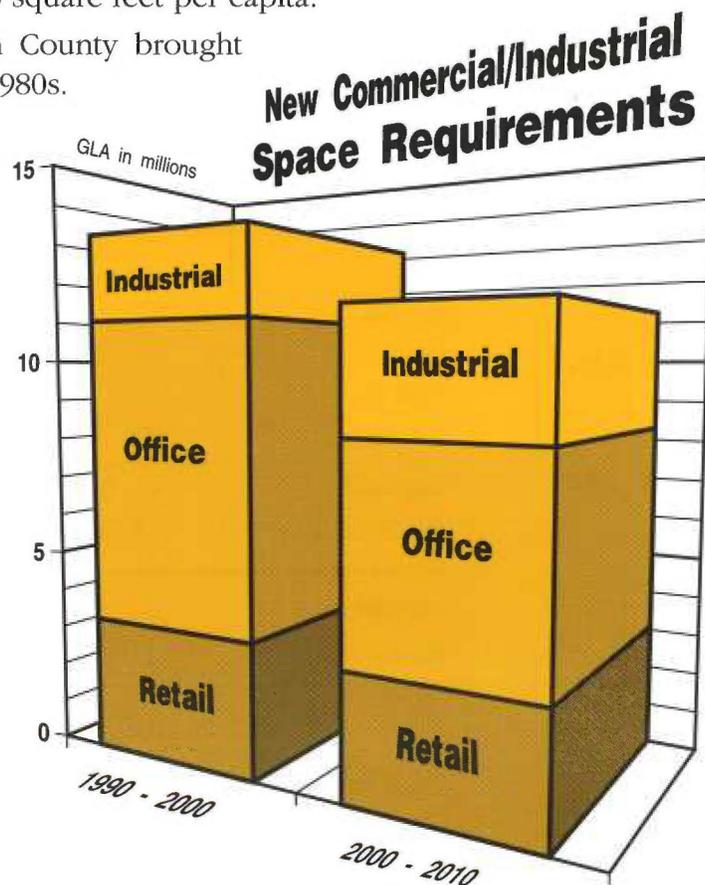
It was during the 1980s that retail became one of Jefferson County's most important business sectors in terms of sales tax revenues and land use. In a 1990 study of large retail centers Jefferson County had over 18 million square feet of retail space, with 6.5 million of that located in unincorporated areas. On a per capita basis the County had more retail square feet per capita, 42 square feet, than the total metropolitan area, 30 square feet. Unincorporated areas had an even higher ratio of 46 square feet per capita.

The urbanization of Jefferson County brought significant retail growth in the 1980s.

Determining which sectors will grow in the future and which nonresidential land uses should be planned for in the next decade is the challenge. An analysis of job growth projections through 2010 may give some insight into future demand.

IMPLICATIONS

The rising number of aging and employed residents is increasing the need for services and conveniences close to home. Neighborhood shopping in well designed settings will become more important as residents demand convenient, timely services and a high quality living environment.



Services will be the largest employment sector by 2010 with over 58,000 jobs.

IMPLICATIONS

The changing employment structure of the County will increase demand for non-residential space and housing for employees. An employer's decision to locate in the County will be affected by the firms' perceptions of the environmental qualities and the level of services the County provides. Future land use decisions should carefully balance new development with the County's ability to maintain its quality living environment.



As the County becomes more economically diverse, service-based employment will rise nearly 75%, increasing the demand for office space. By 2010 office employment is expected to increase 2.1% annually, a total of 60,253 jobs, and absorb an estimated 15,063,250 square feet of office space. The retail sector is expected to grow 1.6% annually, adding 13,862 jobs, and require 5,544,800 square feet of retail space. The industrial sector is expected to grow 1.3% annually, gaining 11,105 jobs and absorb 5,552,500 square feet of industrial space.

NONRESIDENTIAL ABSORPTION

1990-2010

	1990-2000	2000-2010	Total
Retail			
New Jobs	6,162	7,700	13,862
Space Needs (sq. ft.)	2,464,800	3,080,000	5,544,800
Office			
FIRE	3,845	2,200	6,045
Services	14,567	9,400	23,967
Government	10,177	7,900	18,077
TC & PU	1,159	1,200	2,359
Construction	9,005	800	9,805
New Jobs	38,753	21,500	60,253
Space Needs (sq. ft.)	9,688,250	5,375,000	15,063,250
Industrial			
Manufacturing	1,235	500	1,735
Wholesale	3,970	5,400	9,370
New Jobs	5,205	5,900	11,105
Space Needs (sq. ft.)	2,602,500	2,950,000	5,552,500

Source: Employment data are from the Colorado Department of Labor & Employment and DRCOG. Absorption was calculated by multiplying the estimated number of new jobs in each sector by a square footage to employee ratio of 400 sq.ft./employee for retail, 250 sq.ft./employee for office and 500 sq.ft./employee for industrial.

The median household income of County residents, \$43,679, remained high compared to Denver area residents, \$34,999.

As the County becomes more urbanized land use patterns will continue shifting toward consumer and business oriented services thereby increasing the demand for office space. Demand for retail and industrial space will not be as significant.

NONRESIDENTIAL SPACE REQUIREMENTS SUMMARY

Year	Retail	Office	Industrial	Total
1990-2000	2,464,800	9,688,250	2,602,500	14,755,550
2000-2010	3,080,000	5,375,000	2,950,000	11,405,000
Total	5,544,800	15,063,250	5,552,500	26,160,550

Source: Colorado Department of Labor & Employment and DRCOG. Absorption was calculated by multiplying the estimated number of new jobs in each sector by a square footage to employee ratio of 400 sq.ft./employee for retail, 250 sq.ft./employee for office and 500 sq.ft./employee for industrial.

INCOME AND WAGES The 1980s was an era of economic growth but the benefits fell disproportionately across the population. In 1990 the median income of Jefferson County residents remained high in comparison to Denver residents, \$43,679 versus \$34,999. But did wages of employees in the County keep pace with inflation during the 1980s?

JEFFERSON COUNTY WAGES BY INDUSTRY 1980 VS. 1989

	1980 Actual Wages \$	1989 Actual Wages \$	89 Wages Adjusted for Inflation \$	Adjusted 89 Wages minus Actual Wages \$	80 - 89 Actual Wages % Increase
Agriculture	9,702	14,663	14,385	278	51.1
Mining	26,631	46,468	39,486	6,982	74.5
Construction	18,323	23,875	27,168	-3,293	30.3
Manufacturing	21,338	38,022	31,638	6,384	78.2
TC PU *	17,790	26,724	26,377	347	50.2
Wholesale Trade	17,963	27,932	26,634	1,298	55.5
Retail Trade	8,897	11,405	13,192	-1,787	28.2
FIRE *	12,912	21,480	19,145	2,335	66.4
Services	12,188	19,775	18,071	1,704	62.2
Government	16,409	26,981	24,330	2,651	64.4
Average Wage	16,215	25,733	24,043	1,690	58.7
Denver CPI	78.1	115.8			

(CPI = Consumer Price Index) * TC&PU = Transportation, Communications and Public Utilities * FIRE = Finance, Insurance and Real Estate
Source: Average Wages by Industry from the Colorado Department of Labor and Employment.

JEFFERSON COUNTY FOOD STAMP DISTRIBUTION

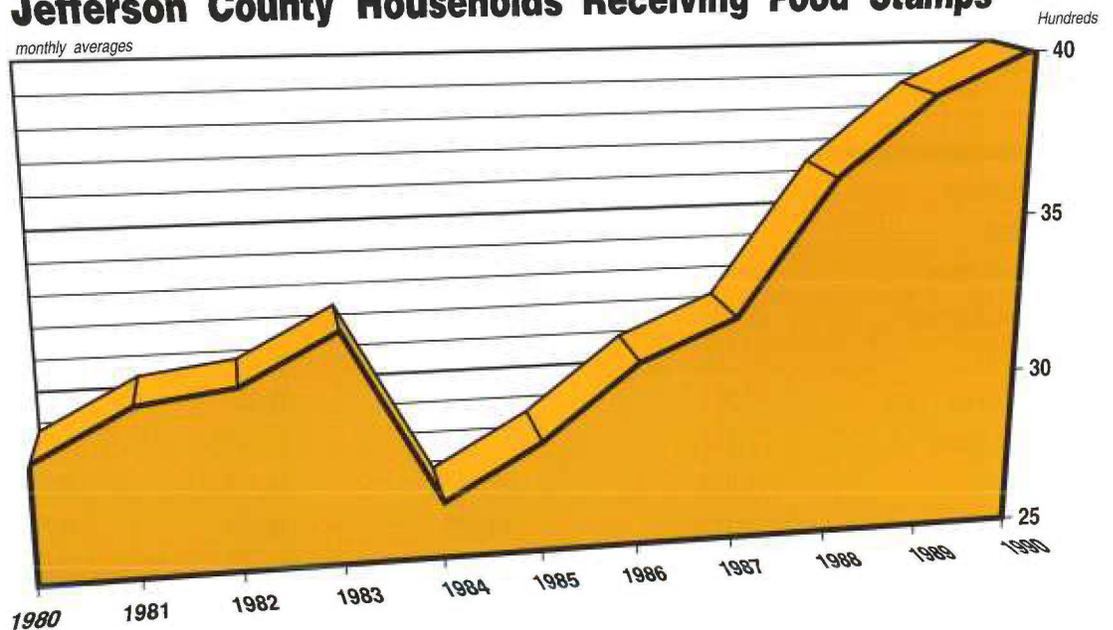
1980-1990

	Annual # of Households	Monthly Avg. # of Households	% Change in # of Households	Annual \$ Amt. Issued	Monthly Avg. \$ Amt. Issued	% Change in \$ Amt. Issued
1980	34,500	2,875		3,459,845	288,320	
1981	36,409	3,034	5.5	4,198,104	349,842	21.3
1982	36,891	3,074	1.3	4,135,829	344,652	-1.5
1983	38,771	3,231	5.1	4,483,336	373,611	8.4
1984	32,134	2,678	-17.1	3,678,448	306,537	-18.0
1985	34,195	2,850	6.4	4,092,028	341,002	11.2
1986	37,030	3,086	8.3	4,782,005	398,500	16.9
1987	38,551	3,213	4.1	5,260,897	438,408	10.0
1988	43,592	3,633	13.1	6,054,340	504,528	15.1
1989	46,501	3,875	6.7	6,908,381	575,698	14.1
1990	48,130	4,011	3.5	8,039,770	669,981	16.4

Source: Jefferson County Social Services

One way to measure change over the decade would be to focus on real income growth in relation to inflation. In 1989, the average wage for all workers employed in Jefferson County was \$25,733, an increase of 59% from 1980. The average wage outpaced inflation by 7%, meaning the average wage earner made \$1,690 more than if wages had increased at the same rate as inflation.

Jefferson County Households Receiving Food Stamps



The average number of households receiving food stamp assistance increased 40%.

But not all sectors of the employment base had real income growth. In two sectors the average wage of workers actually eroded: construction dropped by 14% and retail by 16% less than the rate of inflation. Wages in two sectors soundly outpaced inflation; mining wages increased by 18% over the rate of inflation and manufacturing wages grew by 14%.

While there was an expansion of Jefferson County's employment base, the number of households needing public assistance increased. The average number of households receiving food stamp assistance has increased 40% since 1980 and the average monthly issuance per household rose 67%, from \$100 to \$167. In 1990 over 4,000 households were receiving food stamp assistance. This number is expected to increase.

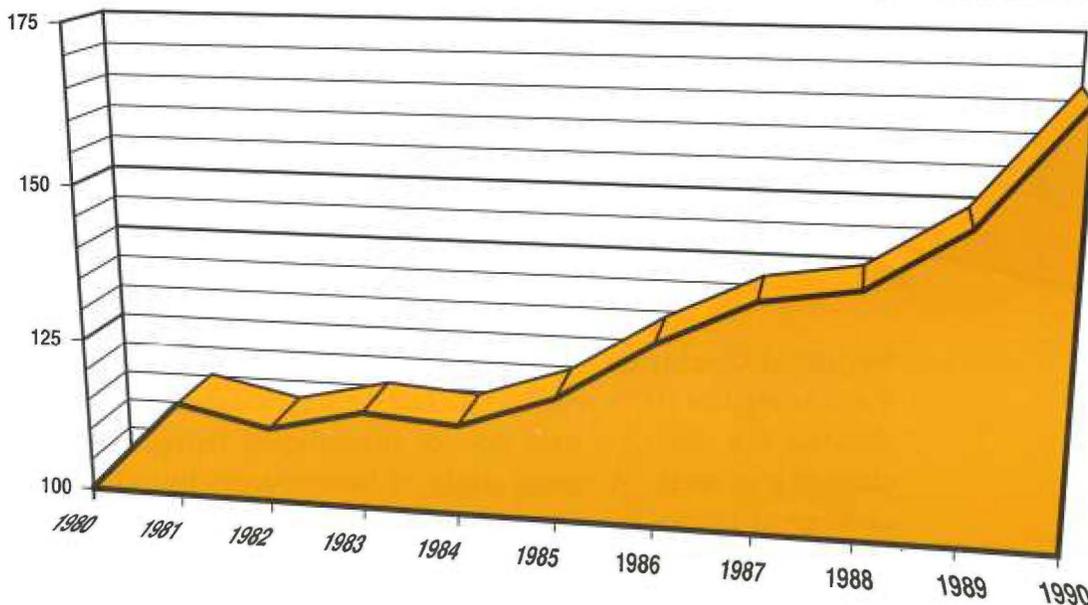
According to Jefferson County Social Services much of the increased need is by single parent households, usually headed by a female lacking the skills to become gainfully employed. Compounding this problem is the expense of child care, which often exceeds the earning potential of the parent. There also has been an increase in the number of two worker families seeking assistance who, because of unemployment or underemployment by one or both wage earners, are no longer able to meet financial obligations.

IMPLICATIONS

Competition for public resources will increase as the number of needy residents grows and revenue sources shrink. In order to meet the needs of County residents public expenditures must be distributed equitably and the system for delivering these services must be optimized.

There is a growing number of families in the County who will need public assistance particularly with child care, food programs and job skills training. Public and private organizations should anticipate the increased need for services and develop efficient delivery systems to provide services.

Average Monthly Food Stamp Dollars Per Jefferson County Household

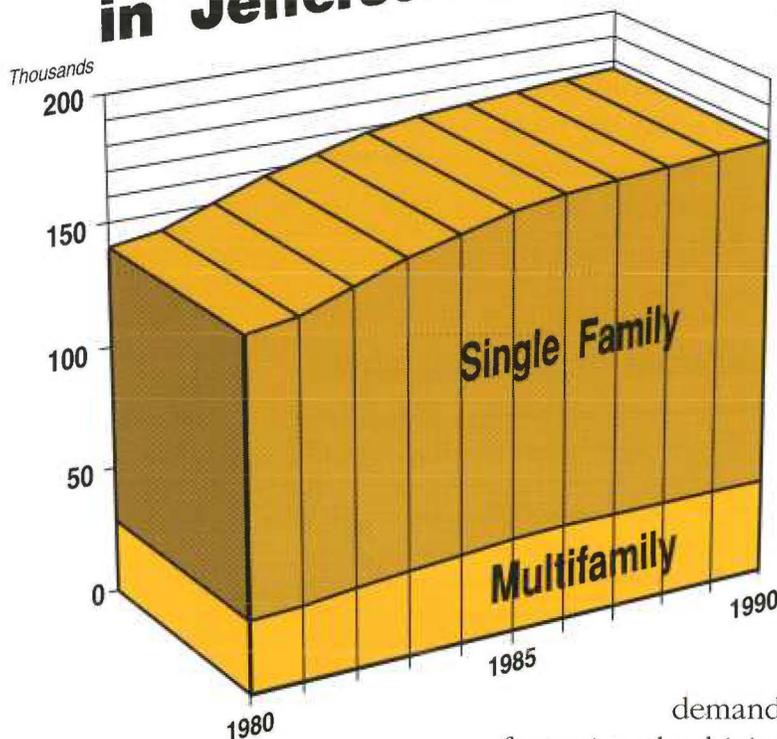


Jefferson County's housing stock rose 30% during the decade and was comprised primarily of single family homes.

BUILT ENVIRONMENT

Despite a mid-decade recession Jefferson County's housing stock increased 30% during the decade from 137,327 units in 1980 to 178,611 in 1990.

Residential Growth in Jefferson County



The housing mix remained virtually unchanged with 75% of the housing stock classified as single family occupied. Approximately 23% were multifamily and 1.7% mobile homes.

New residential construction in Jefferson County gained momentum during 1990 as the housing market continued its recovery. Foreclosures of residential properties reached a decade high of 3,765 in 1988 but began to drop in 1989. Further improvements in the housing market were evidenced by dropping apartment vacancy rates and falling mortgage interest rates. The residential market should continue to improve and future housing demand will be affected by several emerging demographic and economic forces.

HOUSEHOLD CHANGES

The primary force which will affect housing demand is demographic. The rate of household formation, the driving force behind housing demand, will be slower than during the 1970s and 1980s. Not only is household formation slowing but the type and size of households being formed is changing as well. A recent study of homebuyers found that the number of homes bought by married couples declined while the number of nonmarried buyers increased.

Homeowners have begun to regard home purchases as lifetime commitments rather than as investments.

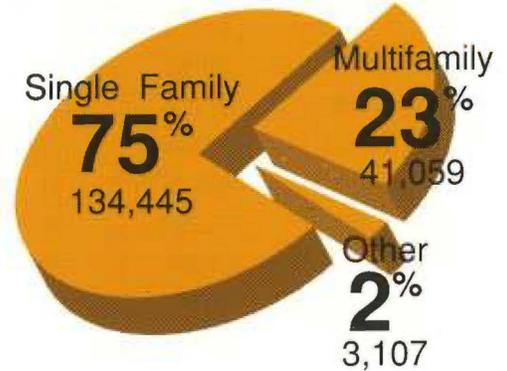
This shift reflects a decline in the traditional family, which has been defined as a married couple with or without children. The Census Bureau estimates that the number of traditional family households in Colorado dropped 5.1% between 1980 and 1990, from 58.9% of all households in 1980 to 53.8% in 1990.

The effects of an aging population and changing family composition have modified household size. In 1990 the number of persons per household was 2.59, down from 2.83 in 1980. By 2010 the number of persons per household is expected to be 2.35, when there will be more single parent and elderly households, and fewer households with children.

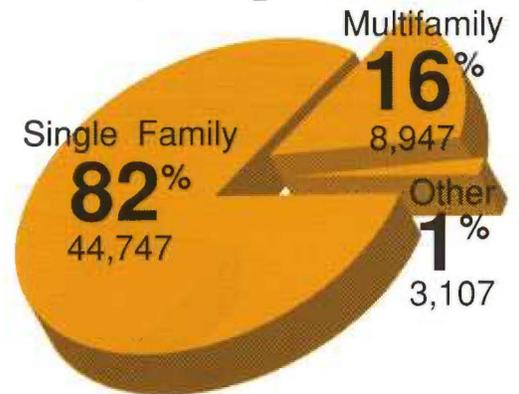
The third factor affecting housing demand is financial. During the late 1980s home prices failed to keep pace with inflation and the outlook for this decade is much the same. Homeowners have begun to regard a home purchase as a lifetime commitment rather than as an investment.

AFFORDABILITY One consequence of the mid-decade recession was the fall in market value for houses in Jefferson County. As a result single family homes became more affordable at the end of the decade. In 1990 the median household income was \$43,679 and the average cost of a resale home was \$106,222. Assuming that the buyer made a 20% downpayment, and that 20% of a median income is spent on mortgage payments, the buyer would require a median household income of \$34,380 to purchase an average priced home.

Cities



Unincorporated



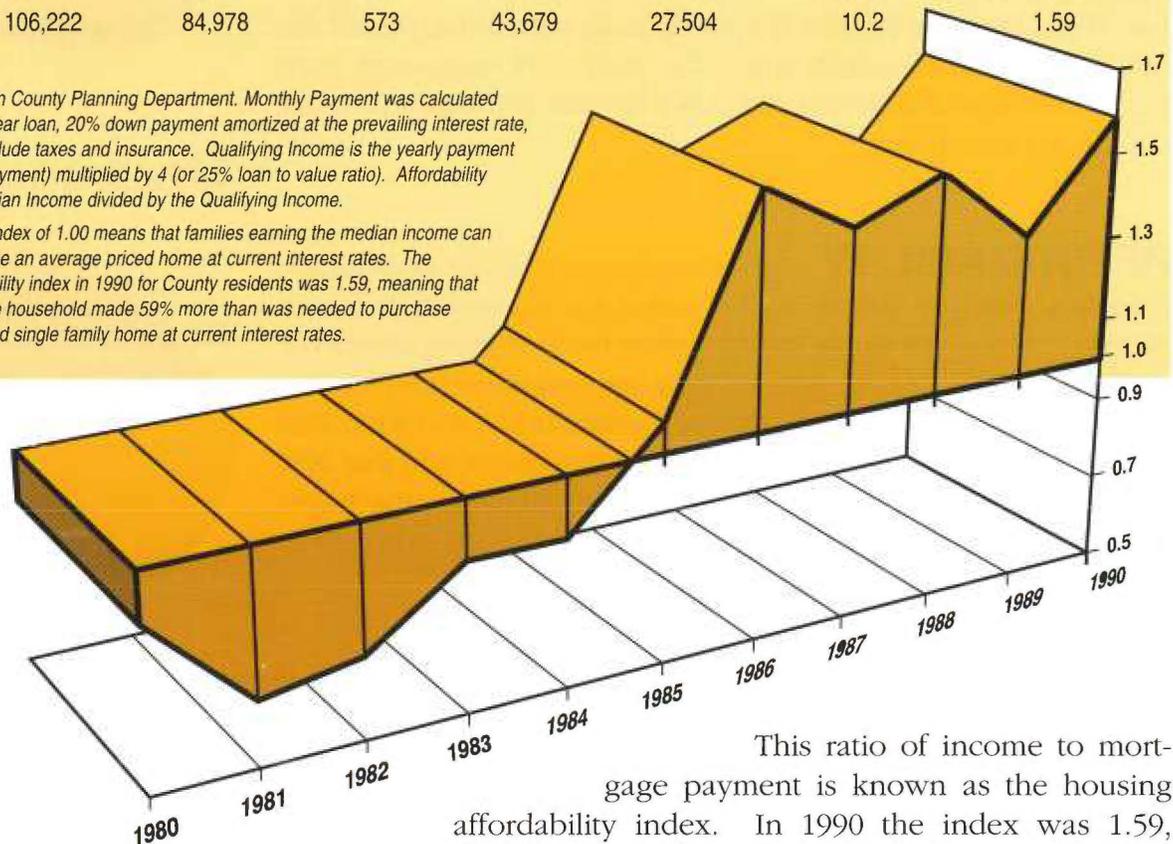
JEFFERSON COUNTY HOUSING AFFORDABILITY INDEX

1980-1990 SINGLE FAMILY HOMES

Year	Average Value in \$	Loan Amount in \$	Monthly Payment in \$	Median Income in \$	Qualifying Income in \$	Interest Rate %	Affordability Index
1980	75,417	60,334	628	26,590	30,144	13.9	0.88
1981	85,779	68,623	906	28,478	43,488	16.5	0.65
1982	90,272	72,218	907	30,244	43,536	15.8	0.69
1983	94,806	75,845	779	32,028	37,392	13.5	0.86
1984	97,166	77,733	825	33,773	39,600	13.8	0.85
1985	97,034	77,627	699	36,011	33,552	12.3	1.07
1986	97,509	78,007	500	37,488	24,000	10.1	1.56
1987	105,149	84,119	565	38,912	27,120	10.2	1.43
1988	101,790	81,432	551	40,299	26,448	10.3	1.52
1989	104,861	83,889	652	41,955	31,296	11.1	1.34
1990	106,222	84,978	573	43,679	27,504	10.2	1.59

Source: Jefferson County Planning Department. Monthly Payment was calculated based on a 30 year loan, 20% down payment amortized at the prevailing interest rate, and does not include taxes and insurance. Qualifying Income is the yearly payment (12 x monthly payment) multiplied by 4 (or 25% loan to value ratio). Affordability Index is the Median Income divided by the Qualifying Income.

An affordability index of 1.00 means that families earning the median income can afford to purchase an average priced home at current interest rates. The housing affordability index in 1990 for County residents was 1.59, meaning that a median income household made 59% more than was needed to purchase an average priced single family home at current interest rates.



This ratio of income to mortgage payment is known as the housing affordability index. In 1990 the index was 1.59, meaning that a household earning the median income made 159% of what it needed to purchase a home at the average price. The higher the index, the more affordable homes become.

The mountain areas experienced a boom in the sale of single family homes priced over \$250,000.

HOME SALES In 1990 data indicate that home prices in Jefferson County were "affordable". But how much did the typical buyer spend on a home? An analysis of home sales showed that in 1990 the majority of homes sold, 63%, were priced under \$100,000, and most of those homes sold, 40%, were priced between \$75,000 and \$100,000. Only 2.6% were priced under \$50,000.

An anomaly in the County housing market was the mountain areas, particularly Evergreen and Genesee, where demand for high-end housing was at a peak. In 1990 many of the 187 homes sold in the "\$250,000-and-over" price range were in the mountain communities. This high-end housing boom, which began in the mid-1980s, has been fueled by two dynamics: an influx of "equity-rich" buyers relocating from out of state and the emergence of an "inheritance generation", which have been able to take advantage of the County's exceptional housing values.



JEFFERSON COUNTY OPEN SPACE PROGRAM

The Jefferson County Open Space Program began in 1972 when County voters approved a one-half percent sales tax to support the program. The primary objective of the program is to acquire and maintain lands which enhance the quality of life in Jefferson County. The program emphasizes preservation of the natural landforms and features which define the unique character of the County as well as acquisition of recreational sites.

In 1990 the Jefferson County Open Space Department received revenues totalling over \$16 million. Since its inception in 1972 over 17,000 acres of land and over 40 miles of trails have been acquired.

ACQUISITIONS

	Land (Acres)	Trails (Miles)
Managed by Open Space	13,708.37	30.92
Leased to Recreation Districts	529.45	10.21
Managed by Other Entities	32.74	
Deeded to Cities	3,121.31	
Total Open Space	17,391.87	41.13

Source: Jefferson County Open Space

Housing demand will continue to grow despite changing demographic trends.

IMPLICATIONS

Growth in the school age population will generate a need for family housing near schools. Neighborhoods with older residents will experience a decline in need for family housing. County land use policies should accommodate these market shifts.

HOUSING DEMAND Changing demographics will bring significant changes to housing demand. As baby boomers enter their peak earning years demand for move-up homes will increase. At the same time the demand for starter homes, particularly multifamily housing, will subside as a shrinking pool of first-time homebuyers enters the market. As the smaller group of “first-time buyers” become “move-up” buyers and the baby boomers enter their retirement years, demand for move-up homes will begin to moderate.

Despite changing demographics housing demand in the County is expected to grow steadily. By 2010 the number of households in Jefferson County is expected to increase 1.4% annually, generating a need for over 50,000 additional homes. Assuming the housing mix remains the same, an average of 1,944 new single family, 596 multifamily and 52 mobile or manufactured homes will be needed annually to accommodate the estimated household growth.

JEFFERSON COUNTY ESTIMATED HOUSING NEED

1990-2010

Year	Occupied Units	Replacement Units	New Units	Vacant Units	Decade Total Need	Annual Need
Single Family						
1990	124,909	124	19,186	194	19,504	1,950
2000	144,413	144	19,037	192	19,373	1,937
2010	163,786					
Subtotal					38,877	1,944
Multifamily						
1990	38,739	39	5,835	59	5,933	593
2000	44,672	45	5,888	59	5,992	599
2010	50,664					
Subtotal					11,925	596
Manufactured Housing						
1990	2,897	3	561	6	570	57
2000	3,467	3	456	5	464	46
2010	3,931					
Subtotal					1,034	52
Total Need					51,836	2,621

Source: Jefferson County Planning Department. Occupied units are the same as Total Households. Replacements equal .001% of Occupied Units. New units are calculated by subtracting the current decade's Occupied Units from the next decade's Occupied Units, minus the number of Replacements, minus the number of Vacant Units. Total Need is calculated by adding Replacements + New Households + Vacancies. Annual Need is calculated by dividing Total Need by the number of years in each time period (i.e., 10 years from 1980-1990). Occupied Units for the next decade can be checked by adding Occupied Units + Replacements + New Units + Vacancies.

Needs of older travelers will be important to transportation planners in the future.

TRANSPORTATION PLANNING

Transportation is essential to economic development in Jefferson County and directly affects the ability to attract employment. A good transportation system should provide a means to transport goods and services for businesses and mobility for its residents.

Over the past decade County residents became more mobile and more dependent on the automobile as the primary mode of travel. Data for 1990 show that the number of daily person trips per household increased to 6.65 from 6.26 in 1985, and the number of daily vehicle trips per household increased from 4.37 to 4.73. However, the number of transit trips per household remained nearly the same, .10, an indication that public transit has not become a frequent mode of travel.

While the automobile will remain the primary mode of transportation during this decade an increase in older drivers will force changes in the next decade. Reliable transportation options will be imperative for older residents who choose to live in their suburban homes rather than move closer to services.



IMPLICATIONS

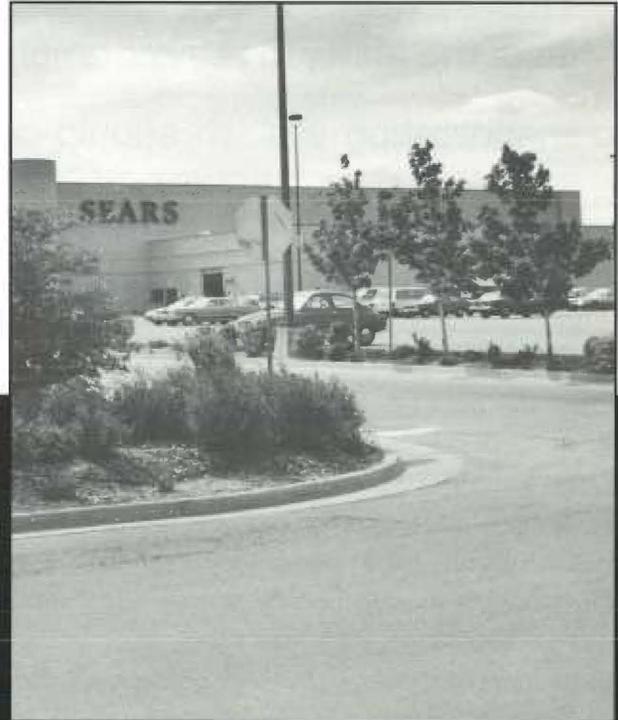
Transportation planning will be affected by the increased number of residents who remain mobile well into their later years. More public transit options such as van pools will be needed for those who no longer drive. To accommodate slower reaction times of older drivers, improvements such as longer freeway access ramps and larger signage should be considered.

The ability to attract employment will be a key to sustained economic growth in the County.

IMPLICATIONS

Infrastructure is a constraint and a stimulus for economic development. As the County's infrastructure ages, it will need expansion or improvement. Strategic planning on how investments in maintenance and expansion can be optimized to best enhance economic development and the quality of life should begin now.

A key to sustained economic growth will be the County's ability to attract employment. Transportation planning should accommodate the demands for adequate roadways for automobile travel, public transit, access, environmental quality and economic development. The low-density residential and commercial development pattern that make Jefferson County such an attractive place to live and work presents a special challenge for public transportation planning.



Retail sales taxes are another source of revenue for public services and facilities. Sales taxes vary within the County and are comprised of state, regional, County and municipal levies. Sales taxes in unincorporated Jefferson County tend to be low, ranging from 4.2 to 4.7%. Sales taxes in incorporated areas range from 6.2 to 7.7%.

SALES TAXES

RETAIL SALES TAX 1990 SUMMARY

Jurisdiction	State Tax %	Regional Tax %	County Open Space %	County Improvement District %	Municipal Tax %	Total Retail Sales Tax %
Unincorporated	3.0	0.7	0.5	0.0	0.0	4.2
Southeast Unincorp.	3.0	0.7	0.5	0.5	0.0	4.7
Arvada	3.0	0.7	0.5	0.0	3.0	7.2
Broomfield	3.0	0.7	0.5	0.0	3.0	7.2
Edgewater	3.0	0.7	0.5	0.0	3.5	7.7
Golden	3.0	0.7	0.5	0.0	2.0	6.2
Lakewood	3.0	0.7	0.5	0.0	2.0	6.2
Morrison	3.0	0.7	0.5	0.0	3.0	7.2
Mountain View	3.0	0.7	0.5	0.0	3.0	7.2
Westminster	3.0	0.7	0.5	0.0	3.0	7.2
Wheat Ridge	3.0	0.7	0.5	0.0	2.0	6.2

Source: Colorado State Department of Revenue

The transformation of the County economy will produce a more complicated local government agenda.

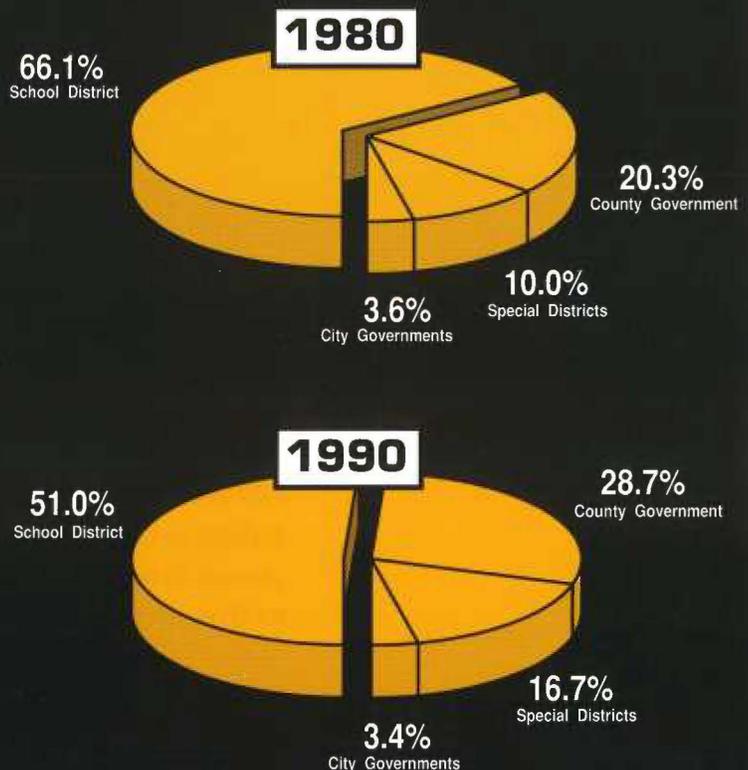
SUMMARY Just as there appears to be a sorting out process at the metropolitan level, there is a similar process developing within the County among incorporated and unincorporated areas.

AN URBANIZING COUNTY The incorporated areas are becoming retail and service-based and the unincorporated areas are attracting high technology research and development and manufacturing. This process is partially the result of incorporated areas actively seeking new sources of revenue, by annexing and incorporating commercial properties to offset the ever-increasing costs of providing public services.

PROPERTY TAXES

Property taxes are a primary source of revenue for the County and some of its municipal governments. Many public services and facilities are funded from property tax revenues. In 1990 51% of the property tax revenues collected went to the R-1 School District, 29% to the County government, 3% to cities and 17% was distributed to special districts.

In 1990 there were over 120 special districts in Jefferson County which provided a wide range of services, from water and sanitation to recreation. Special districts set mill levies for property within their respective boundaries and collect property tax revenues through the County Treasurer's Office.



The key elements which make the County a desirable place to live and work are now in place.

IMPLICATIONS

As the County becomes more urbanized, residents and employers will expect a higher level of services. Services which were not necessary when the County was more rural, such as street sweeping and animal and weed control, will be expected. In the absence of new revenue sources the County must focus on the efficient delivery of services through the application of advanced technology, streamlined administration and improved service delivery systems.

The transformation of the County economy will raise many new social and economic issues. For example: if employers continue an exodus from the urban center to the outlying suburbs, highly skilled workers will continue to move toward those jobs; as upper and middle income residents move toward jobs, neighborhoods will become more diverse as minorities and lower income residents begin moving into older suburban areas; and an increased number of older, more stable homeowners will choose to stay in the older suburban neighborhoods rather than move toward job growth.

Changing demographics and a diversifying economy will be the catalyst for unprecedented changes in the way Jefferson County residents work and live. These changes will produce a much more complicated local government agenda and challenge County residents, local officials and industry leaders as has no other time in history.



POISED FOR GROWTH

Through the boom and bust cycles of the past, Jefferson County has carefully planned for growth. The County now has in place the key elements that make it a desirable place to work and live: a large, highly skilled workforce, stable residential areas with a wide range of housing choices, one of the best school systems in the metropolitan area, and an open space and parks program which actively preserves the quality living environment.

The County is no longer suburban in the traditional sense and like many maturing suburban areas, there are growth issues that the County must confront: water availability, increasing service costs, transportation, infrastructure, and demographic changes, particularly the aging population.

Jefferson County will face these and other challenges as this century comes to a close to maintain its preeminent status as a choice place to live, work, shop and play.

STUDY BACKGROUND

Unless otherwise stated, the data used in this report are for the total county. Many of the data are secondary data from various sources. Historic population and housing data are from the U.S. Census Bureau. Population projections and median age data are from the Demographic Section of the Colorado Division of Local Government. Historic employment data were compiled from the Colorado Department of Labor & Employment. Employment projections and transportation data are from the Denver Regional Council of Governments (DRCOG).

Primary data for unincorporated Jefferson County, including the existing and zoned number of housing units and nonresidential existing and zoned square footages are from the Jefferson County Planning Department Land Use Inventory.

In analyzing future housing demand for this study some assumptions were made. It was assumed that the housing mix would stay relatively stable through 2010 and that the percentage share of multifamily units would not increase markedly. This assumption was based on several factors. First, historic data show that the housing mix has been consistent during the last two decades with the majority of homes being single family (75%), about 24% being multifamily, and 1.3% mobile homes. Second, future demographics point to a decrease in the number of 18-24 year olds, the age group that typically inhabits multifamily dwellings. And third, as long as the existing transportation system supports single family living and there are large tracts of vacant land for development, it is probable that single family homes will be the dominant housing type.

BIBLIOGRAPHY

Denver Regional Council of Governments, "*A Demographic Profile of Older Persons in the Denver Metropolitan Area*," 1988.

Denver Regional Council of Governments, "*Population and Employment Forecast Distributions, 1990, 2000, 2010*," 1988.

Colorado Department of Local Affairs, Demographic Section, "*Colorado Population Projections*" and other various data.

Metro-List, Inc., "*Residential MLS Sold Properties*," 1990.

Jefferson County Planning Department, "*Land Use Inventory*," 1990.

Denver Regional Council of Governments, "*Travel in the Denver Region*," 1988 and 1990.

Coldwell-Banker Commercial, "*The Commercial Real Estate Market*," 1991.

Jefferson County Public Schools, "*Annual Student Housing Report*," 1990.

Jefferson County Public Trustee, foreclosure data, 1990.

Chicago Title and Trust Company, "*Who's Buying Houses in America*," 1990.

U.S. Census Bureau, various data.

U.S. Bureau of Economic Analysis, various data.