

REGION 3 OVERVIEW

Region 3 is comprised of Adams, Arapahoe, Boulder, Broomfield, Clear Creek, Denver, Douglas, Gilpin, and Jefferson Counties. It accounts for 4.9% of Colorado total land area.

The total population for the region is 2.47 million, or approximately 56% of the state's total population. Per capita income exceeds the state average for every county in the region except Adams.

The region is home to two MSAs, Denver and Boulder-Longmont. Denver, the state capital, is also the largest city in Colorado. The area has the most highly developed infrastructure in the state. Denver International Airport is located in Denver County, and most of Region 3 is within an hour drive of the airport. There are also several general aviation and reliever airports in the region. Furthermore, Denver lies at an important national transportation crossroads, the intersection of Interstate 25 (north-south) with Interstate 70 (east-west) and Interstate 76 (east-west).

Numerous higher education opportunities are available in the region. The University of Colorado (with Denver and Boulder campuses), the Colorado School of Mines, Denver University, and Regis University are some of the nationally recognized universities located in the area. There are also two military bases in the region, and a multitude of federal facilities.

Region 3 is the economic hub for both the state of Colorado, and the larger Rocky Mountain Region. The economy is fairly diverse, with strengths in manufacturing, transportation, and high-tech industries. Agriculture is not a significant contributor to the local economy, although some production does take place. Mining is not prevalent in the region, although Gilpin County and Clear Creek County still have operational mines, and Denver County is home to the world's largest gold mining company. Although this company does not have current extraction operations in the state of Colorado, it provides significant employment. For this reason, a good portion of the state's mining jobs are located in the metro area.

With Denver's central location in the United States, the area has long been a transportation hub. Trucking, warehousing, and air transportation have major presences in the region. The majority of the state's transportation jobs are found in Denver and Adams Counties. Expansion is expected in this area as a result of continued growth at DIA and the area reliever airports.

Portions of Boulder, Jefferson, Denver, Arapahoe and Adams counties are designated federal HubZones providing preferences in selling to the government. This advantage could generate economic growth for companies offering products and services purchased by Department of Defense and other federal agencies, or by federal prime contractors. The HubZone could also be used to attract companies already doing business with the government to relocate to eligible areas of the region.

The state's manufacturing industry is also centered in the metro area. Both new and old economy industries are present in the region. The area has strengths in general manufacturing, and also in photonics, computer hardware and storage, and software. Boulder, Broomfield, Denver, Adams, and Arapahoe counties have especially strong manufacturing industries, despite state national trends that show declines in employment.

However, areas such as photonics, computer storage, and software are expected to continue to grow, and all of the metro area can look to capture a portion of this market.

Although telecommunications have taken a substantial hit both locally and nationally in recent years, telecom remains strong, and continues to play an important role in the area. While it is unlikely that companies will regain the levels of growth they experienced during the 1990's, the industry is expected to recover, and growth is possible.

Aerospace industries are also present in Region 3. Boulder has developed a substantial aerospace cluster, driven by local university research. Lockheed Martin also has a strong presence in the region, and the area could continue to grow.

University research, as well as research conducted at federal labs, should continue to drive growth in a variety of industries in Region 3. The area already has strong biotechnology and photonics industries, and an emerging nanotechnology industry. Continued research and cooperation between the universities and the public/private sectors should lead to significant growth in these areas. Defense and homeland security is becoming a large market, and the metro area could capture a portion of the dollars available in this area.

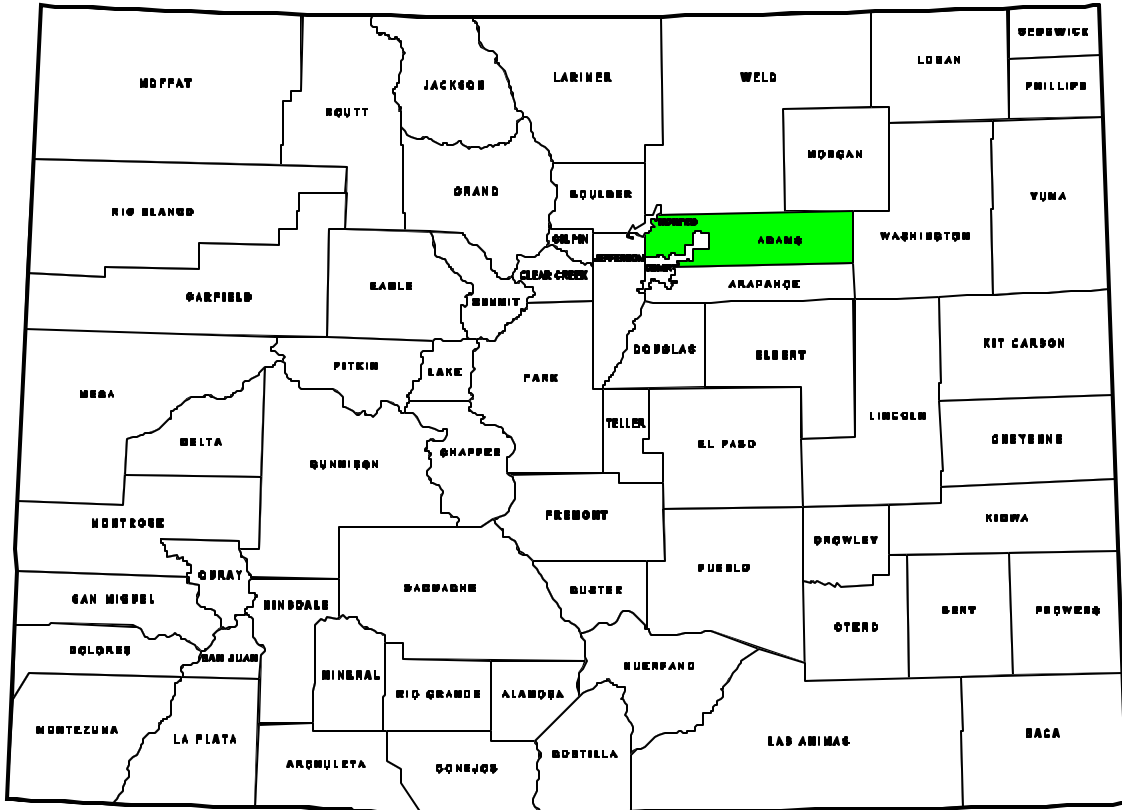
The metro area serves as the regional center for health care and financial services. Parts of the region, especially Douglas and Broomfield Counties have experienced very rapid population growth and Adams County is expected to show strong growth in the next twenty years. As people continue to migrate to these areas, the demand for basic financial and health care services will increase, and these industries should experience growth. The strength of the area's biotech industry could also help to drive growth in the health care industry. Furthermore, the Denver area is recognized nationally as a hub for mutual funds, and as the economy recovers and investors regain confidence in the markets, this area could grow.

Tourism is also an important part of the economy. Gilpin County is almost entirely dependent on its gambling industry. Clear Creek County is also heavily reliant on the tourism opportunities presented by Loveland Ski Area, and the other outdoor recreation opportunities available. Tourism is also important in the metro area. The presence of the airport obviously facilitates a good portion of tourism in the entire state. Denver is also a popular convention destination. The four major professional sports teams in Denver, along with the State Capital Building, the Denver Zoo, and the Museum of Natural History, help to attract visitors to the area. There are also numerous cultural and recreational tourist activities available in the area. Furthermore, while none of the state's major tourist attractions are located within the boundaries of Region 3, many of the state's tourists stay in the region, either with family members or at hotels, and then take day-trips to their various destinations.

The metro area also has a small, but growing film industry. There are a number of film production companies and suppliers, and the natural beauty of the state makes it an attractive filming location. This is an area that could be built upon in the future.

Overall, growth prospects for the Region 3 economy look promising. As the national and state economies recover, the region should follow. The Denver metro area will continue to be the center of economic activity in the state, and the Rocky Mountain region.

ADAMS COUNTY



ADAMS COUNTY RESOURCES

Transportation

Commercial Service Airports: Denver International Airport is in neighboring Denver County

General Aviation Airports: none

Reliever Airports: Front Range Airport

Interstate Highway Miles: 58.1 (Interstate 70)

Military Bases, Federal Facilities, and Prisons

Military Base: Rocky Mountain Arsenal-USA (closed)

Federal Facilities: none

State Prisons: Denver Reception and Diagnostic Center, Denver Women's Correctional Facility

Higher Education (Main Campus)

Four Year: University of Colorado Health Sciences Center

Two Year: Front Range Community College

Private Acc.: Westwood College of Technology

Ski Areas, Casinos, and National Parks

Ski Areas: none

Casinos/Gaming: greyhound track in Commerce City

National Parks/Sites: none

Natural Resources

Oil Production (Barrels of Oil): 564,705

Gas Production (Million Cubic Feet): 8,200,271

Coal Production (Short Tons): 0

CO2 Production (Million Cubic Feet): 0

Wind Level Rating (5=Outstanding, 4=Good): <4

Biomass Energy Potential: <2,500,001 mmbtu

ADAMS COUNTY OVERVIEW			
	Adams County	Colorado	US
People			
Population, 2001 estimate	374,891	4,417,714	284.8 M
Population percent change, April 1, 2000-July 1, 2001	3.0%	2.7%	1.2%
Population, percent change, 1990 to 2000	37.3%	30.6%	13.1%
Persons under 18 years old, percent, 2000	28.6%	25.6%	25.7%
Persons 65 years old and over, percent, 2000	7.8%	9.7%	12.4%
White persons, percent, 2000	77.3%	82.8%	75.1%
Persons of Hispanic or Latino origin, percent, 2000*	28.2%	17.1%	12.5%
Black or African American persons, percent, 2000	3.0%	3.8%	12.3%
American Indian and Alaska Native persons, percent, 2000	1.2%	1.0%	0.9%
Asian persons, percent, 2000	3.2%	2.2%	3.6%
Persons reporting some other race, percent, 2000	11.7%	7.2%	5.5%
High school graduates, percent of persons age 25+, 2000	78.8%	86.9%	80.4%
Bachelor's degree or higher, pct of persons age 25+, 2000	17.4%	32.7%	24.4%
Mean travel time to work, workers age 16+ (minutes), 2000	27.6	24.3	25.5
Homeownership rate, 2000	70.6%	67.3%	66.2%
Median value of owner-occupied housing units, 2000	\$149,800	\$166,600	\$119,600
Median household money income, 1999	\$47,323	\$47,203	\$41,994
Per capita money income, 1999	\$19,944	\$24,049	\$21,587
Persons below poverty, percent, 1999	8.9%	9.3%	12.4%
Business			
Federal funds and grants, 2001 (\$1,000)	1,271,388	24,344,658	1.8 B
Geography			
Land area, 2000 (square miles)	1,192	103,718	3.5 M
Persons per square mile, 2000	305.3	41.5	79.6
Note: *Hispanics may be of any race, so also are included in applicable race categories.			

ESTABLISHMENTS BY SIZE CLASS		
Size Class	Number	Percent
1-4 Employees	3,655	50.4%
5-9 Employees	1,350	18.6%
10-19 Employees	979	13.5%
20-49 Employees	753	10.4%
50-99 Employees	277	3.8%
100-249 Employees	170	2.3%
250-499 Employees	45	0.6%
500-999 Employees	12	0.2%
1,000+ Employees	4	0.1%
Total	7,245	99.9%

HOUSEHOLDS BY INCOME LEVELS		
Income Bracket	Number	Percent
<\$10,000	7,264	5.7%
\$10,000 to \$19,999	11,227	8.8%
\$20,000 to \$29,999	16,017	12.5%
\$30,000 to \$39,999	16,992	13.2%
\$40,000 to \$49,999	16,273	12.7%
\$50,000 to \$59,999	14,502	11.3%
\$60,000 to \$74,999	17,282	13.5%
\$75,000 to \$99,999	15,923	12.4%
\$100,000 to \$124,999	6,562	5.1%
\$125,000 to \$149,999	2,839	2.2%
\$150,000 to \$199,000	1,891	1.5%
\$200,000+	1,518	1.2%
Total	128,290	100.1%

OCCUPATIONS BY TYPE		
Occupation type	Number	Percent
Management, Professional, and Related	48,547	26.7%
Service	23,550	13.0%
Sales and Office	53,051	29.2%
Farming, Fishing, and Forestry	540	0.3%
Construction, Extraction, and Maintenance	25,964	14.3%
Production, Trans., and Material Moving	30,069	16.5%

WORKERS BY CLASS		
Worker Class	Number	Percent
Private	152,737	84.1%
Government	19,941	11.0%
Self Employed Non-Inc.	8,567	4.7%
Unpaid Family	476	0.3%

Source: U.S. Census Bureau - County Quickfacts, 2001 County Business Patterns, and 2000 Census Summary File 3.

COUNTY ASSETS									
	Adams	Arapahoe	Boulder	Broomfield	Clear Creek	Denver	Douglas	Gilpin	Jefferson
Commercial Airport						X			
General Aviation Airport		X	X						
Reliever Airport	X	X							X
Interstate Highway	X	X		X	X	X	X		X
State Prison	X								X
Federal Facility			X			X			X
Military Facility	X	X							
Two-year College/University	X	X	X			X	X		X
Four-year College/University	X	X	X			X			X
Private College/University	X	X	X	X		X	X		X
>25% of Pop. with Bachelor Degree		X	X	X	X	X	X	X	X
>10,000 employees	X	X	X	X		X	X		X
Companies w/ 500+ employees	X	X	X	X		X	X	X	X
Manufacturing Shipments (1997)	X	X	X	NA		X	X		X
Ski Resorts			X		X				
Casinos/Gaming	X	X						X	
National Parks/Sites			X						
Oil, Gas, CO ₂ Production	X	X	X			X			
Coal Production									
Wind Energy									
Biomass Energy Potential									

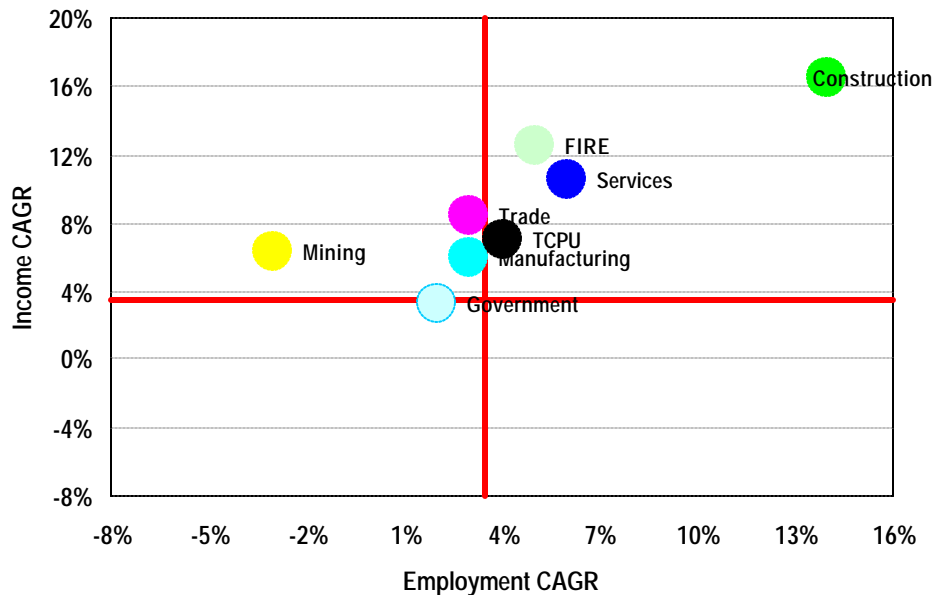
Adams County Highlights
<p>Population</p> <ul style="list-style-type: none"> Adams County is eight times more densely populated than the state. The majority of the population resides in the urban/suburban areas in the western half of the county. The eastern portion of Adams is largely rural. <p>Income and Housing</p> <ul style="list-style-type: none"> Incomes are relatively high for households, but a large portion of the population works in low-wage jobs, which leaves the median household income equal to the state average, but the per capita income below the state and national averages. Average home prices are slightly below the state average, but there is a significant parity between home prices in the rural and urban communities in Adams County. <p>Occupation, Class of Work, Establishment Size</p> <ul style="list-style-type: none"> Occupation and class of work is diverse and metropolitan. There are over 200 establishments with 100+ employees. <p>Transportation Infrastructure</p> <ul style="list-style-type: none"> Adams County is a transportation hub for Colorado, with DIA, several interstate freeways, toll roads, and railroads all in the Denver metro area. <p>State, Federal, or Military Facilities</p> <ul style="list-style-type: none"> A federal facility and two correctional facilities exist in the county, and several state facilities are in nearby Denver County. <p>Education</p> <ul style="list-style-type: none"> Adams County includes the University of Colorado Health Sciences Center, DeVry University, University of Phoenix, and Front Range Community College. <p>Attractions</p> <ul style="list-style-type: none"> Rocky Mountain Wildlife Refuge is in Adams County. There are no other notable attractions in Adams County, but the proximity to Denver offers access to substantial arts, museums, music, sports, and other entertainment. Adams County food and lodging firms benefit from these attractions. <p>Natural Resources</p> <ul style="list-style-type: none"> There are some oil and gas resources and two major refineries in the county.

HISTORICAL ANALYSIS OF EMPLOYMENT AND INCOME ADAMS COUNTY													
Employment and Income (2001)						CAGR 1991 to 2001				Location Quotient (2001)			
Employment			Income			Employment		Income		Employment		Income	
		Share			Share								Share
Trade	46,365	26.6%	Trade	\$1,452,077	22.7%	Con.	14.4%	Con.	16.5%	TCPU	1.87	Con.	1.80
Services	36,824	21.1	Services	1,232,741	19.3	Ag.	5.5	FIRE	12.5	Con.	1.80	Trade	1.58
Con.	25,144	14.4	Con.	978,854	15.3	Services	5.5	Services	10.5	Mfg.	1.26	Mfg.	1.37
Gov.	19,938	11.4	Mfg.	831,115	13.0	FIRE	4.5	Trade	8.4	Trade	1.24	TCPU	1.22
TCPU	18,866	10.8	Gov.	810,209	12.7	TCPU	4.4	Mfg.	6.4	Gov.	0.81	Gov.	0.86
Mfg.	16,429	9.4	TCPU	774,147	12.1	Mfg.	3.5	OGM	6.4	Ag.	0.74	Ag.	0.70
FIRE	6,446	3.7	FIRE	204,484	3.2	Trade	3.4	TCPU	6.4	Services	0.66	Services	0.64
Ag.	3,831	2.2	Ag.	62,636	1.0	Gov.	1.5	Gov.	3.4	FIRE	0.49	OGM	0.40
OGM	411	0.2	OGM	43,792	0.7	OGM	-3.4	Ag.		OGM	0.38	FIRE	0.34

Source: DOLA – Colorado Employment by Sector.

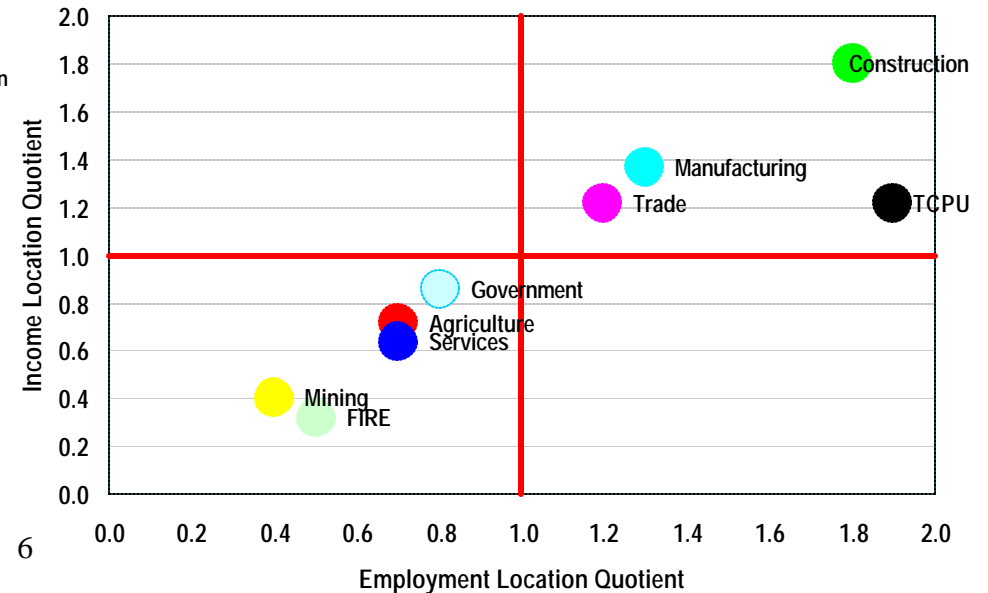
Adams County Industry Growth 1991-2001

The chart below illustrates growth of the nine major industry sectors from 1991-2001. Compound annual growth rates (CAGR) are used. From 1991-2001 total state employment grew at a CAGR of 3.6%, and the Denver/Boulder CPI grew at a CAGR of 3.5%. The chart is divided into quadrants based on these values. The upper right-hand quadrant includes industries in the county that had employment growth greater than the state average and income growth greater than the CPI.



Adams County Industry Concentration 2001

The chart below illustrates concentration of the nine major industry sectors in 2001. Location quotients (LQ) are used to measure the concentration of an industry in the county relative to the state. An LQ greater than 1 means the county has a high concentration in that industry. The chart is divided into quadrants. The upper right-hand quadrant includes industries with high employment concentration and income concentration.



ADAMS COUNTY SECTOR BREAKDOWN				
Sector	Number of Workers	Total Production (M)	% of Production Exported	Value of Exports (M)
Top 10 Sectors by Employment				
Wholesale Trade	15,909	\$1,807.3	35%	\$632.6
State & Local Government - Education	10,125	362.8	0	0.0
Eating & Drinking	9,102	347.1	1	3.5
Motor Freight Transport and Warehousing	9,023	981.7	55	539.9
New Residential Structures	7,442	1,211.4	0	0.0
Maintenance and Repair, Other Facilities	6,511	462.8	62	286.9
Miscellaneous Retail	6,188	190.3	0	0.0
Personnel Supply Services	4,858	89.7	0	0.0
New Industrial and Commercial Buildings	4,849	617.5	0	0.0
Food Stores	4,774	277.6	42	116.6
Top Sectors by Production				
Wholesale Trade	15,909	\$1,807.3	35%	\$632.6
Telephone and Telegraph Apparatus	3,467	1,625.3	53	861.4
New Residential Structures	7,442	1,211.4	0	0.0
Motor Freight Transport and Warehousing	9,023	981.7	55	539.9
Real Estate	4,118	842.2	40	336.9
Petroleum Refining	259	661.0	50	330.5
New Industrial and Commercial Buildings	4,849	617.5	0	0.0
Communications, Except Radio and TV	1,958	594.9	52	309.3
Top Primary Sectors				
Telephone and Telegraph Apparatus	3,467	\$1,625.3	53%	\$861.4
Motor Freight Transport and Warehousing	9,023	981.7	55	539.9
Petroleum Refining	259	661.0	50	330.5
Communications, Except Radio and TV	1,958	594.9	52	309.3
Maintenance and Repair, Other Facilities	6,511	462.8	62	286.9
Air Transportation	3,313	324.3	79	256.2
Other Business Services	3,008	387.3	66	255.6
Miscellaneous Plastics Products	890	155.6	100	155.6
Bread, Cake and Related Products	885	153.2	81	124.1

Source: Minnesota IMPLAN Group, Inc.(2000)

Industry Summary

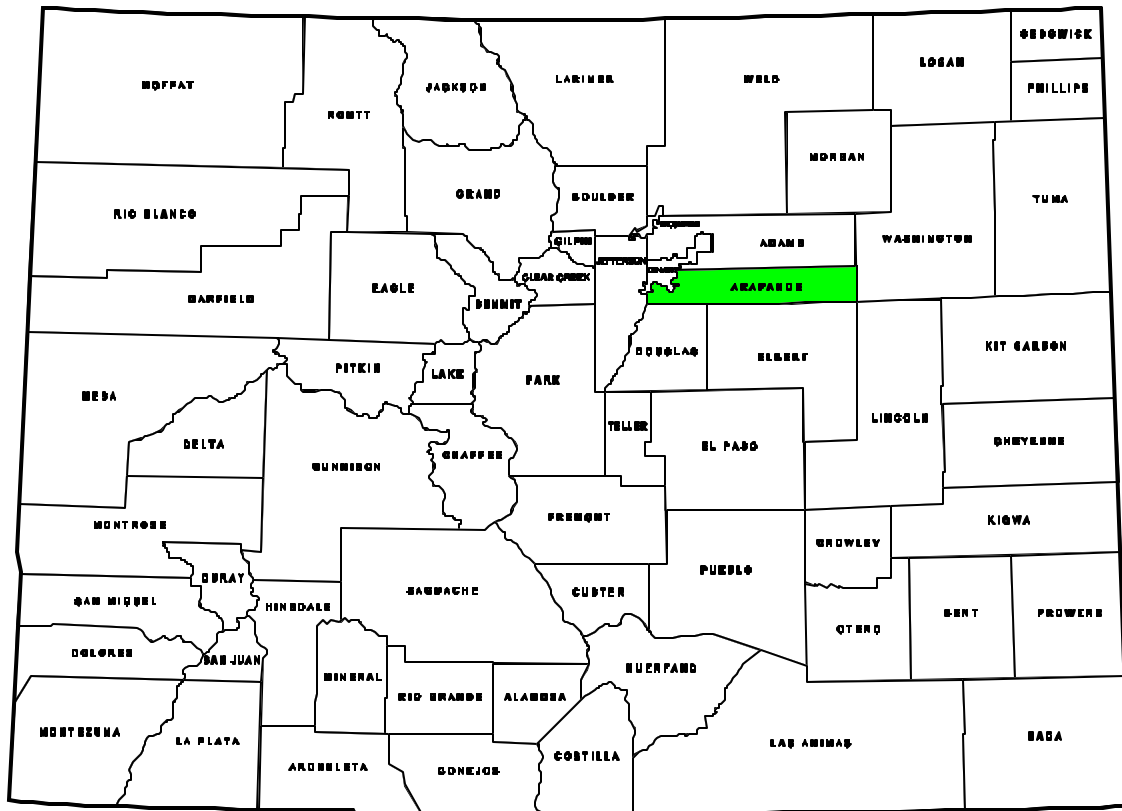
- Adams County is one of the largest, most populated counties in Colorado. County businesses provide support to the state capital. The county is also a major overland shipping hub. Both new and old neighborhoods house commuters to the Denver metro area. A major industrial county, most of the state's wholesale trade and commerce occur here.
- Major existing industries are: wholesale trade and trucking, oil refining and plastic products, business services, and communications.
- With most commerce already going through Adams County, there is a strong infrastructure available for future commerce-related and industrial investment. As people migrate into the county, construction and business services are the industries with the highest growth rates.
- Compared with Colorado, the Adams County economy is concentrated in construction, trade, and services. We expect these sectors to continue to grow.
- Eastern Adams County is more rural and housing prices are low. However, the region may become populated as Colorado and Denver grow.

ADAMS COUNTY - CURRENT, TARGET, AND EMERGING GROWTH INDUSTRIES*

	Current	Target	Growth	Comments
Agriculture				In 2002, Adams County was the state's third highest winter wheat producer. The county also produces spring wheat, sunflowers, sugar beets, sorghum, hay, dry beans, corn for grain, and barley. According to the 1997 Census of Agriculture, market value of crops sold was \$68,516,000; the value of livestock and products sold was \$19,223,000. The area has developed 15 farmers' markets providing specialty crop growers with the opportunity to increase revenues by selling direct to the consumer. Three of these markets offer certified organic produce, indicating a capacity to meet growing consumer demand for organic and natural foods. Adams County contains one of the state's largest cheese producers.
Animals	X			
Crops	X	X		
Dairy	X			
Manufacturing				Opportunities exist to build on the strengths of computer and electronic manufacturing, fabricated metal products, food, nonmetallic mineral products, and transportation equipment. More than 9% of the state's computer manufacturing employees work in Adams County. The strength of this industry is supported by the strong cluster in Boulder County. Between 6-10% of photonics companies are located in Adams County. The growth of this sector may be tied to expansion of biotechnology.
General				
Computer Hardware/Storage	X	X		
Photonics	X	X	X	
Energy and Environmental				Two petroleum refineries operate in the county: Suncor Energy U.S.A. and Valero Energy
Minerals, Gas/Petroleum	X	X		
Renewable Energy				
Environmental Industries	X			
Transportation				Transportation is a key industry for Adams County. With its location adjacent to DIA and Front Range Airport, opportunities exist to build on its air and trucking industry. Slightly more than one-fifth of the state's transportation employees and about one-third of the state's trucking employees work in Adams County. With its abundant space, Adams County is poised to take advantage of its strength in warehousing. About 20% of the state's warehousing employees work in Adams County.
Air	X	X	X	
Trucking	X	X	X	
Rail				
General				While a minimal number of employees work in the National Defense NAICS sector in Adams County, growth is not anticipated.
Aerospace/Space				
Defense/Homeland Security				
Telecommunications				
Biotechnology	X	X	X	The county extends south to the Fitzsimons biomedical complex. The Colorado Biosciences Park Aurora integrates R&D, education, and hospital care. The broader redevelopment project provides opportunities to encourage commercialization and location of biomedical and medical device companies. This facility will also significantly increase the number of medical service jobs in the county. Given the presence of plastics companies in the county, and the agricultural activities in Adams and adjacent counties to the east, the county could also explore the future feasibility of bio-plastic operations based on emerging technologies using agricultural residues. Adams County can also support interaction of university and industry nanotechnology and biotechnology R&D to capitalize on future products that are anticipated from the convergence of these technologies.
Nanotechnology	X	X	X	
Services				
Call Centers	X			
Financial				Adams County is currently home to several call centers, although the area is not expected to experience significant growth in this industry.
Healthcare	X	X	X	
Research and Development				
Software				
Tourism	X	X		There is a greyhound track in Adams County. Although the county has fewer tourist attractions than other metro counties, it is close to those in Denver, and DIA is nearby. Four film projects were filmed in the county in 2002.
Film	X	X		

*Note: Definition of current target and emerging growth industry included in introduction to this section.

ARAPAHOE COUNTY



ARAPAHOE COUNTY RESOURCES

Transportation

Commercial Service Airports: none, but DIA is within 15 miles of most of the county's population

General Aviation Airports: Aurora Airpark

Reliever Airports: Centennial Airport

Interstate Highway Miles: 48.0

Military Bases, Federal Facilities, and Prisons

Military Base: Buckley AGB-USAF

Federal Facilities: none

State Prisons: none

Higher Education (Main Campus)

Four Year: none

Two Year: Arapahoe Community College, T.H. Pickens Technical Center, Community College of Aurora

Private Acc.: College for Financial Planning, Jones International University, Platt College, Webster university

Ski Areas, Casinos, and National Parks

Ski Areas: none

Casinos/Gaming: Horse track in Aurora

National Parks/Sites: none

Natural Resources

Oil Production (Barrels of Oil): 74,152

Gas Production (Million Cubic Feet): 527,151

Coal Production (Short Tons): 0

CO2 Production (Million Cubic Feet): 0

Wind Level Rating (5=Outstanding, 4=Good): <4

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Persons per square mile, 2000	607.6	41.5	79.6

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ESTABLISHMENTS BY SIZE CLASS		
Size Class	Number	Percent
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5-9 Employees	2,841	17.1%
10-19 Employees	2,002	12.0%
20-49 Employees	1,541	9.3%
50-99 Employees	602	3.6%
100-249 Employees	346	2.1%
250-499 Employees	121	0.7%
500-999 Employees	40	0.2%
1,000+ Employees	20	0.1%
Total	16,645	100.0%

HOUSEHOLDS BY INCOME LEVELS		
Income Bracket	Number	Percent
<\$10,000	8,595	4.5%
\$10,000 to \$19,999	13,854	7.3%
\$20,000 to \$29,999	20,669	10.8%
\$30,000 to \$39,999	23,053	12.1%
\$40,000 to \$49,999	21,169	11.1%
\$50,000 to \$59,999	19,698	10.3%
\$60,000 to \$74,999	23,411	12.3%
\$75,000 to \$99,999	26,258	13.8%
\$100,000 to \$124,999	13,891	7.3%
\$125,000 to \$149,999	7,061	3.7%
\$150,000 to \$199,000	5,945	3.1%
\$200,000+	7,357	3.9%
Total	190,961	100.2%

OCCUPATIONS BY TYPE		
Occupation type	Number	Percent
Management, Professional, and Related	104,002	39.6%
Service	30,692	11.7%
Sales and Office	82,218	31.3%
Farming, Fishing, and Forestry	158	0.1%
Construction, Extraction, and Maintenance	22,908	8.7%
Production, Trans., and Material Moving	22,651	8.6%

WORKERS BY CLASS		
Worker Class	Number	Percent
Private	215,540	82.1%
Government	29,243	11.1%
Self Employed Non-Inc.	17,186	6.5%
Unpaid Family	660	0.3%

Source: U.S. Census Bureau - County Quickfacts, 2001 County Business Patterns, and 2000 Census Summary File 3.

COUNTY ASSETS

	Arapahoe	Adams	Boulder	Broomfield	Clear Creek	Denver	Douglas	Gilpin	Jefferson
Commercial Airport						X			
General Aviation Airport	X		X						
Reliever Airport	X	X							X
Interstate Highway	X	X		X	X	X	X		X
State Prison		X							X
Federal Facility			X			X			X
Military Facility	X	X							
Two-year College/University	X	X	X			X	X		X
Four-year College/University	X	X	X			X			X
Private College/University	X	X	X	X		X	X		X
>25% of Pop. with Bachelor Degree	X		X	X	X	X	X	X	X
>10,000 employees	X	X	X	X		X	X		X
Companies w/ 500+ employees	X	X	X	X		X	X	X	X
Manufacturing Shipments (1997)	X	X	X	NA		X	X		X
Ski Resorts			X		X				
Casinos/Gaming	X	X						X	
National Parks/Sites			X						
Oil, Gas, CO ₂ Production	X	X	X			X			
Coal Production									
Wind Energy									
Biomass Energy Potential									

Arapahoe County Highlights

Population

- Arapahoe County houses about 10% of Colorado's total population. The county is densely populated in the west, and sparsely populated in the east. The county population is predominantly white and lives in urban/suburban areas around the Denver metro area. According to the Census Bureau, about half of the population works outside of Arapahoe County. Population grew twice fast as the nation, and slightly more slowly than the state from 1990 to 2000.

Income and Housing

- Median household and per capita incomes are higher than the state and national averages.
- Housing prices are also high, about \$5,000 higher than the state average and \$51,000 higher than the national average.

Occupation, Class of Work, Establishment Size

- Occupation types cover the spectrum in Arapahoe. Over 500 establishments have 100+ employees.

Transportation Infrastructure

- Several freeways cross Arapahoe County. DIA and Centennial Airport are in close proximity to the county.

State, Federal, or Military Facilities

- Buckley Air Force Base is in Arapahoe County.

Education

- The population is highly educated and there are numerous opportunities for higher education in the area.

Attractions

- There are no major natural attractions in the county, but a variety of local and regional art, culture, museum, and natural attractions are within 1 hour's drive.

Natural Resources

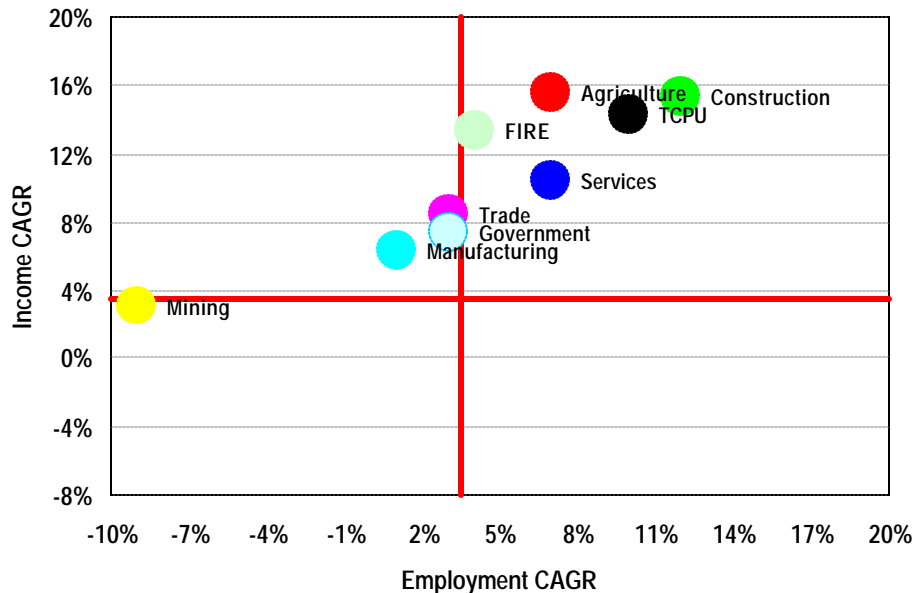
- Some natural gas and oil exist in the county, but the reserves are not large compared with other counties.

HISTORICAL ANALYSIS OF EMPLOYMENT AND INCOME ARAPAHOE COUNTY													
Employment and Income (2001)						CAGR 1991 to 2001				Location Quotient (2001)			
Employment			Income			Employment		Income		Employment		Income	
		Share			Share								
Services	123,817	35.1%	Services	\$5,901,748	32.3%	Con.	11.8%	Ag.	15.5%	FIRE	1.60	FIRE	1.57
Trade	76,947	21.8	Trade	2,899,852	15.9	TCPU	9.5	Con.	15.3	TCPU	1.36	TCPU	1.54
FIRE	42,299	12.0	TCPU	2,810,019	15.4	Ag.	7.4	TCPU	14.5	Services	1.10	Trade	1.10
Gov.	33,051	9.4	FIRE	2,689,121	14.7	Services	6.5	FIRE	13.4	Con.	1.03	Services	1.07
Con.	29,162	8.3	Con.	1,487,391	8.1	FIRE	4.4	Services	10.4	Trade	1.01	Con.	0.96
TCPU	27,810	7.9	Gov.	1,352,031	7.4	Gov.	3.4	Trade	8.4	Gov.	0.66	OGM	0.71
Mfg.	13,704	3.9	Mfg.	776,666	4.3	Trade	3.4	Gov.	7.5	Mfg.	0.52	Ag.	0.50
Ag.	4,950	1.4	OGM	219,602	1.2	Mfg.	1.4	Mfg.	6.4	OGM	0.49	Gov.	0.50
OGM	1,087	0.3	Ag.	126,691	0.7	OGM	-9.0	OGM	3.4	Ag.	0.47	Mfg.	0.45

Source: DOLA – Colorado Employment by Sector.

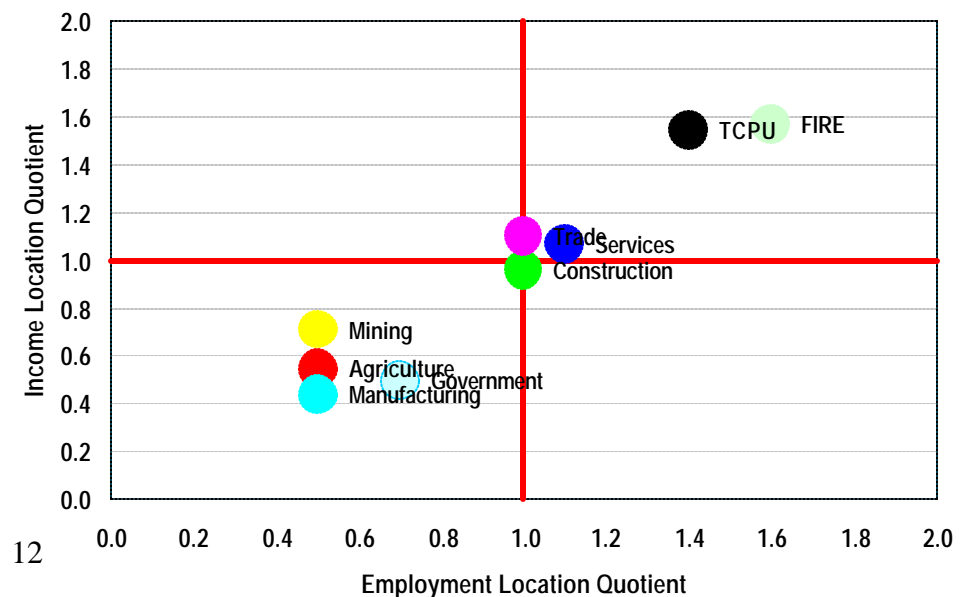
Arapahoe County Industry Growth 1991-2001

The chart below illustrates growth of the nine major industry sectors from 1991-2001. Compound annual growth rates (CAGR) are used. From 1991-2001 total state employment grew at a CAGR of 3.6%, and the Denver/Boulder CPI grew at a CAGR of 3.5%. The chart is divided into quadrants based on these values. The upper right-hand quadrant includes industries in the county that had employment growth greater than the state average and income growth greater than the CPI.



Arapahoe County Industry Concentration 2001

The chart below illustrates concentration of the nine major industry sectors in 2001. Location quotients (LQ) are used to measure the concentration of an industry in the county relative to the state. An LQ greater than 1 means the county has a high concentration in that industry. The chart is divided into quadrants. The upper right-hand quadrant includes industries with high employment concentration and income concentration.



ARAPAHOE COUNTY SECTOR BREAKDOWN				
Sector	Number of Workers	Total Production (M)	% of Production Exported	Value of Exports (M)
Top 10 Sectors by Employment				
Credit Agencies	23,676	\$854.5	83%	\$709.2
Eating & Drinking	20,286	852.7	12	102.3
Computer and Data Processing Services	19,975	2,397.7	68	1,630.4
Wholesale Trade	19,919	3,890.0	53	2,061.7
Communications, Except Radio and TV	17,666	8,052.0	84	6,763.7
Engineering, Architectural Services	14,229	1,498.6	54	809.2
State & Local Government - Non-Education	13,900	534.5	0	0.0
Miscellaneous Retail	13,686	465.9	0	0.0
Personnel Supply Services	13,650	403.9	38	153.5
State & Local Government - Education	13,351	605.5	0	0.0
Top Sectors by Production				
Communications, Except Radio and TV	17,666	\$8,052.0	84%	\$6,763.7
Wholesale Trade	19,919	3,890.0	53	2,061.7
Computer and Data Processing Services	19,975	2,397.7	68	1,630.4
Real Estate	8,955	2,212.1	44	973.3
New Residential Structures	9,241	1,555.0	0	0.0
Insurance Carriers	6,508	1,513.9	74	1,120.3
Engineering, Architectural Services	14,229	1,498.6	54	809.2
Automotive Dealers & Service Stations	8,830	936.0	46	430.6
Doctors and Dentists	9,008	918.7	14	128.6
Top Primary Sectors				
Communications, Except Radio and TV	17,666	\$8,052.0	84%	\$6,763.7
Wholesale Trade	19,919	3,890.0	53	2,061.7
Computer and Data Processing Services	19,975	2,397.7	68	1,630.4
Insurance Carriers	6,508	1,513.9	74	1,120.3
Engineering, Architectural Services	14,229	1,498.6	54	809.2
Natural Gas & Crude Petroleum	2,734	911.3	84	765.5
Credit Agencies	23,676	854.5	83	709.2
Advertising	759	812.7	48	390.1
Miscellaneous Publishing	3,161	275.8	95	262.0

Source: Minnesota IMPLAN Group, Inc. (2000)

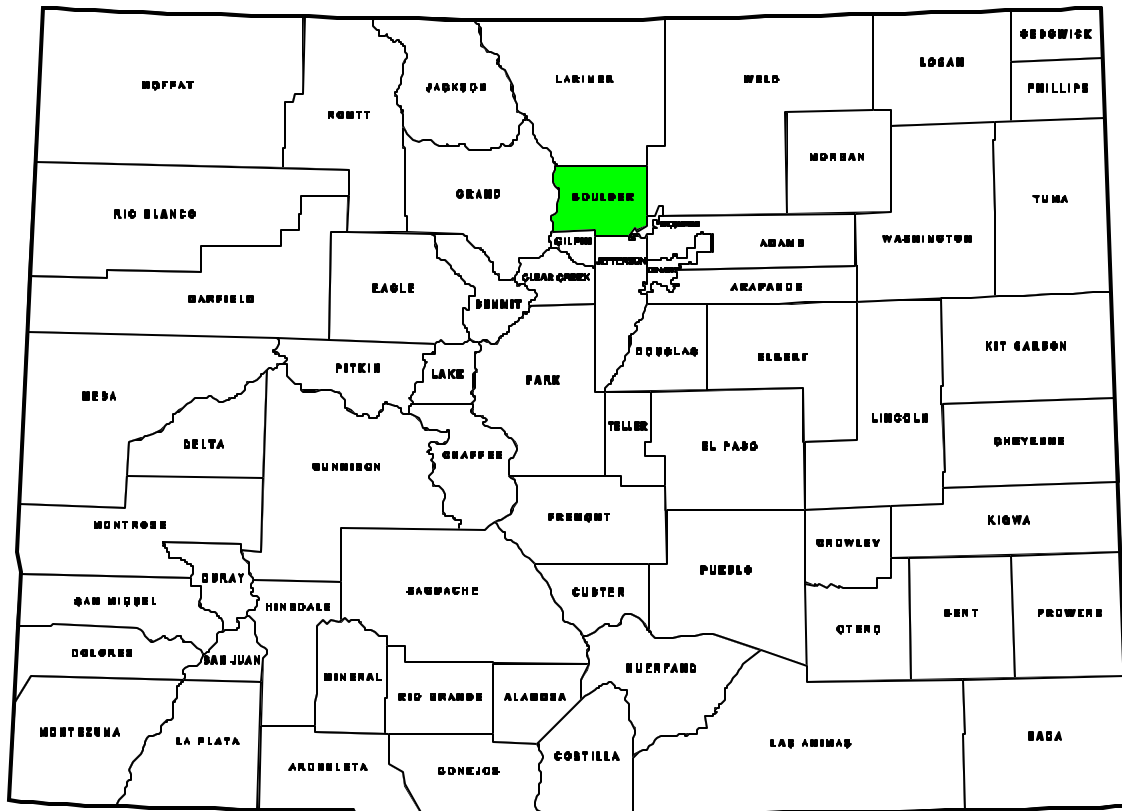
Industry Summary

- Arapahoe County was the first county in Colorado and used to be larger, containing all of Denver. The county has a very large population (600,000). Arapahoe is part of the Denver metro complex, and has a significant portion of the financial, insurance, and other services in the area.
- Insurance, credit agencies, communications (e.g., telecom), wholesale trade, and computer/data processing are large employers and generate significant output. However, there are also substantial high-skilled services: architecture, engineering, advertising, and publishing are also large sectors in Arapahoe.
- The broad sectors FIRE and TCPU are most concentrated in Arapahoe County, and also more highly paid. However, construction and agriculture are the sectors to see the highest income and production growth since 1991.
- Overall, Arapahoe County has a large, broad, and diverse economic base. Almost all of the required amenities for investment are either present in the county, or they exist in nearby Denver and Adams Counties.

ARAPAHOE COUNTY - CURRENT, TARGET, AND EMERGING GROWTH INDUSTRIES*				
	Current	Target	Growth	Comments
Agriculture				Arapahoe County produces corn, hay, sunflowers, wheat, and cattle, generating \$23,612,000 from the sale of agricultural products in 1997. The area has developed seven farmers' markets providing specialty crop growers with the opportunity to increase revenues by selling direct to the consumer. One of these markets offers certified organic produce and indicates a capacity to meet growing consumer demand for organic and natural foods. The importance of agriculture will likely decrease as population expands and farm land declines.
Animals	X			
Crops	X			
Dairy	X			
Manufacturing				Opportunities exist to build on the strengths of fabricated metal products, machinery manufacturing, computer and electronic product manufacturing, printing and related support activities, food-processing manufacturing, and transportation equipment manufacturing.
General				
Computer Hardware/Storage	X			
Photonics	X	X	X	
Energy and Environmental				About 3-5% of the state's computer manufacturing employees work in Arapahoe County. About 5% of photonics companies are located there. The strength of these sectors is supported by strong clusters in Boulder. There is also a large concentration of software companies in the county, which is expected to grow in the future.
Minerals, Gas/Petroleum				
Renewable Energy				
Environmental Industries	X	X		Environmental industries have a strong presence in the county.
Transportation				There is a small concentration of employees in the transportation industry. This is not viewed as a growth area.
Air				
Trucking				
Rail				About 10% of the state's employees in the national security NAICS sector work in Arapahoe County.
General				Arapahoe County has several biomedical and medical device companies, offering access to workforce, research, and services required by the industry.
Aerospace/Space	X	X		
Defense/Homeland Security	X	X		Telecom infrastructure is strong. About 25% of the state's telecommunications employees work in the county.
Telecommunications	X	X		
Biotechnology	X	X	X	Arapahoe County is home to numerous call centers, which provide more than 1,500 jobs. The area's universities and colleges provide an inexpensive source of labor, which could attract additional call centers.
Nanotechnology				
Services				Health care provides a significant number of jobs in the county and will experience growth due to its proximity to Fitzsimons health-care facilities.
Call Centers	X	X	X	
Financial	X	X		
Healthcare	X	X	X	Private-sector R&D in the county and federally funded labs and university research in the metro area help to drive growth in high-technology areas.
Research and Development	X	X		
Software	X	X	X	There are no major tourist attractions in the county, but several cultural and art offerings are nearby. A horse track is located in the county.
Tourism	X	X		
Film	X	X		A total of seven film projects took place in Arapahoe County during 2002, including several commercials.

*Note: Definition of current target and emerging growth industry included in introduction to this section

BOULDER COUNTY



BOULDER COUNTY RESOURCES

Transportation

Commercial Service Airports: none

General Aviation Airports: Boulder Municipal, Longmont-Vance Brand Municipal

Reliever Airports: none

Interstate Highway Miles: 0

Military Bases, Federal Facilities, and Prisons

Military Base: none

Federal Facilities: NIST, National Telecommunication and Information Administration, NOAA- Aeronomy Laboratory, NOAA- Environmental Technology Laboratory, NOAA- Forecast Systems Laboratory, NOAA/ERL- Space Environment Laboratory, NOAA/NESDIS- National Geophysical Data Center

State Prisons: none

Higher Education (Main Campus)

Four Year: University of Colorado at Boulder

Two Year: Front Range Community College (Longmont and Boulder)

Private Acc.: Naropa University, National Technology University

Ski Areas, Casinos, and National Parks

Ski Areas: Eldora

Casinos: none

National Parks: Rocky Mountain NP

Natural Resources/Energy

Oil Production (Barrels of Oil): 99,706

Gas Production (Million Cubic Feet): 1,722,838

Coal Production (Short Tons): 0

CO2 Production (Million Cubic Feet): 0

Wind Level Rating (5=Outstanding, 4=Good): <4

Biomass Energy Potential: <2,500,001 mmbtu

BOULDER COUNTY OVERVIEW			
	Boulder County	Colorado	US
People			
Population, 2001 estimate	297,686	4,417,714	284.8 M
Population percent change, April 1, 2000-July 1, 2001	2.2%	2.7%	1.2%
Population, percent change, 1990 to 2000	29.3%	30.6%	13.1%
Persons under 18 years old, percent, 2000	22.9%	25.6%	25.7%
Persons 65 years old and over, percent, 2000	7.8%	9.7%	12.4%
White persons, percent, 2000 (a)	88.5%	82.8%	75.1%
Persons of Hispanic or Latino origin, percent, 2000 (b)	10.5%	17.1%	12.5%
Black or African American persons, percent, 2000 (a)	0.9%	3.8%	12.3%
American Indian and Alaska Native persons, percent, 2000 (a)	0.6%	1.0%	0.9%
Asian persons, percent, 2000 (a)	3.1%	2.2%	3.6%
Persons reporting some other race, percent, 2000 (a)	4.7%	7.2%	5.5%
High school graduates, percent of persons age 25+, 2000	92.8%	86.9%	80.4%
Bachelor's degree or higher, pct of persons age 25+, 2000	52.4%	32.7%	24.4%
Mean travel time to work, workers age 16+ (minutes), 2000	22.4	24.3	25.5
Homeownership rate, 2000	64.7%	67.3%	66.2%
Median value of owner-occupied housing units, 2000	\$241,900	\$166,600	\$119,600
Median household money income, 1999	\$55,861	\$47,203	\$41,994
Per capita money income, 1999	\$28,976	\$24,049	\$21,587
Persons below poverty, percent, 1999	9.5%	9.3%	12.4%
Business			
Federal funds and grants, 2001 (\$1,000)	1,569,408	24,344,658	1.8 B
Geography			
Land area, 2000 (square miles)	742	103,718	3.5 M
Persons per square mile, 2000	392.3	41.5	79.6

ESTABLISHMENTS BY SIZE CLASS		
Size Class	Number	Percent
1-4 Employees	6,565	57.8%
5-9 Employees	1,928	17.0%
10-19 Employees	1,300	11.4%
20-49 Employees	983	8.7%
50-99 Employees	307	2.7%
100-249 Employees	206	1.8%
250-499 Employees	44	0.4%
500-999 Employees	18	0.2%
1,000+ Employees	10	0.1%
Total	11,361	100.1%

HOUSEHOLDS BY INCOME LEVELS		
Income Bracket	Number	Percent
<\$10,000	7,549	6.6%
\$10,000 to \$19,999	9,605	8.4%
\$20,000 to \$29,999	11,112	9.7%
\$30,000 to \$39,999	12,130	10.6%
\$40,000 to \$49,999	10,332	9.0%
\$50,000 to \$59,999	10,466	9.1%
\$60,000 to \$74,999	13,119	11.4%
\$75,000 to \$99,999	15,603	13.6%
\$100,000 to \$124,999	9,967	8.7%
\$125,000 to \$149,999	5,281	4.6%
\$150,000 to \$199,000	5,063	4.4%
\$200,000+	4,566	4.0%
Total	114,793	100.1%

OCCUPATIONS BY TYPE		
Occupation Type	Number	Percent
Management, Professional, and Related	81,511	50.2%
Service	19,648	12.1%
Sales and Office	38,428	23.7%
Farming, Fishing, and Forestry	261	0.2%
Construction, Extraction, and Maintenance	10,160	6.3%
Production, Trans., and Material Moving	12,420	7.6%

WORKERS BY CLASS		
Worker Class	Number	Percent
Private	124,448	76.6%
Government	24,313	15.0%
Self Employed Non-Inc.	13,200	8.1%
Unpaid Family	467	0.3%

Source: U.S. Census Bureau - County Quickfacts, 2001 County Business Patterns, and 2000 Census Summary File 3.

COUNTY ASSETS									
	Boulder	Adams	Arapahoe	Broomfield	Clear Creek	Denver	Douglas	Gilpin	Jefferson
Commercial Airport						X			
General Aviation Airport	X		X						
Reliever Airport		X	X						X
Interstate Highway		X	X	X	X	X	X		X
State Prison		X							X
Federal Facility	X					X			X
Military Facility		X	X						
Two-year College/University	X	X	X			X	X		X
Four-year College/University	X	X	X			X			X
Private College/University	X	X	X	X		X	X		X
>25% of Pop. with Bachelor Degree	X		X	X	X	X	X	X	X
>10,000 employees	X	X	X	X		X	X		X
Companies w/ 500+ employees	X	X	X	X		X	X	X	X
Manufacturing Shipments (1997)	X	X	X	NA		X	X		X
Ski Resorts	X				X				
Casinos		X	X					X	
National Parks/Sites	X								
Oil, Gas, CO ₂ Production	X	X	X			X			
Coal Production									
Wind Energy									
Biomass Energy Potential									

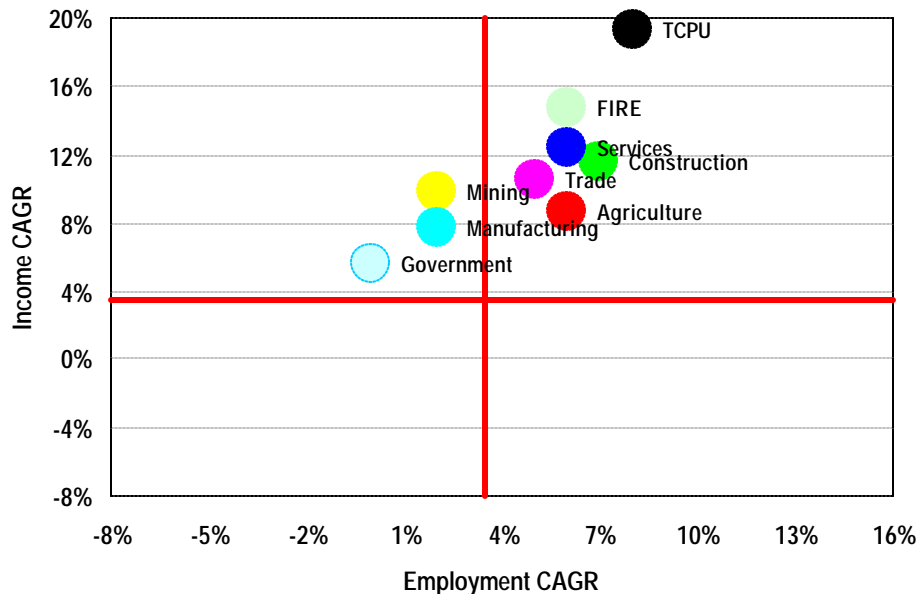
Boulder County Highlights
<p>Population</p> <ul style="list-style-type: none"> Boulder County is a densely populated area and experienced rapid growth commensurate with the state, and twice the national average. <p>Income and Housing</p> <ul style="list-style-type: none"> Boulder County is much wealthier than the state overall; over 21% of the households make more than \$100,000 per year. Most of the wealth is concentrated in Boulder. Boulder County has the most expensive housing market outside of the resort communities. Median house prices are \$80,000 more than the state median, and \$120,000 more than the national median. <p>Occupation, Class of Work, Establishment Size</p> <ul style="list-style-type: none"> There is a base of 278 companies with 100+ employees. Outside of basic services, core economy jobs are highly-skilled and require a bachelors' degree or more. <p>Transportation Infrastructure</p> <ul style="list-style-type: none"> Boulder County is in close proximity to the state's interstate system, DIA, and Jeffco Airport. <p>State, Federal, or Military Facilities</p> <ul style="list-style-type: none"> The presence of the Federal Labs has a positive impact on the wages, employment, and intellectual firepower of Boulder County. The federal facilities are mostly research facilities rather than prisons, etc... <p>Education</p> <ul style="list-style-type: none"> Boulder County has a strong level of higher education opportunities and a highly educated work force. <p>Attractions</p> <ul style="list-style-type: none"> While the City of Boulder is not a destination resort area, notable tourism attractions are located in or around the county. <p>Natural Resources</p> <ul style="list-style-type: none"> There are significant levels of oil and natural gas production in Boulder County. These resources may not be utilized as housing prices make the land around Boulder County more valuable.

HISTORICAL ANALYSIS OF EMPLOYMENT AND INCOME BOULDER COUNTY													
Employment and Income (2001)						CAGR 1991 to 2001				Location Quotient (2001)			
Employment			Income			Employment		Income		Employment		Income	
		Share			Share								
Services	83,475	36.9%	Services	\$4,029,780	38.9%	TCPU	8.6%	TCPU	19.3%	Mfg.	1.90	Mfg.	2.11
Trade	48,804	21.6	Mfg.	2,070,848	20.0	Con.	7.4	FIRE	15.3	Services	1.16	Services	1.28
Mfg.	32,291	14.3	Trade	1,269,463	12.2	Services	6.4	Con.	12.5	Trade	1.00	Trade	0.85
Gov.	28,418	12.6	Gov.	1,213,157	11.7	Ag.	5.4	Services	12.4	Gov.	0.89	Gov.	0.79
Con.	11,039	4.9	TCPU	647,106	6.2	FIRE	5.4	Trade	11.3	FIRE	0.63	TCPU	0.63
FIRE	10,593	4.7	FIRE	530,779	5.1	Trade	5.3	OGM	10.2	Con.	0.61	Con.	0.58
TCPU	7,489	3.3	Con.	507,128	4.9	Mfg.	2.4	Ag.	9.4	TCPU	0.57	FIRE	0.54
Ag.	3,622	1.6	Ag.	71,070	0.7	OGM	2.3	Mfg.	8.4	Ag.	0.54	Ag.	0.49
OGM	301	0.1	OGM	26,008	0.3	Gov.	0.4	Gov.	6.3	OGM	0.21	OGM	0.15

Source: DOLA – Colorado Employment by Sector.

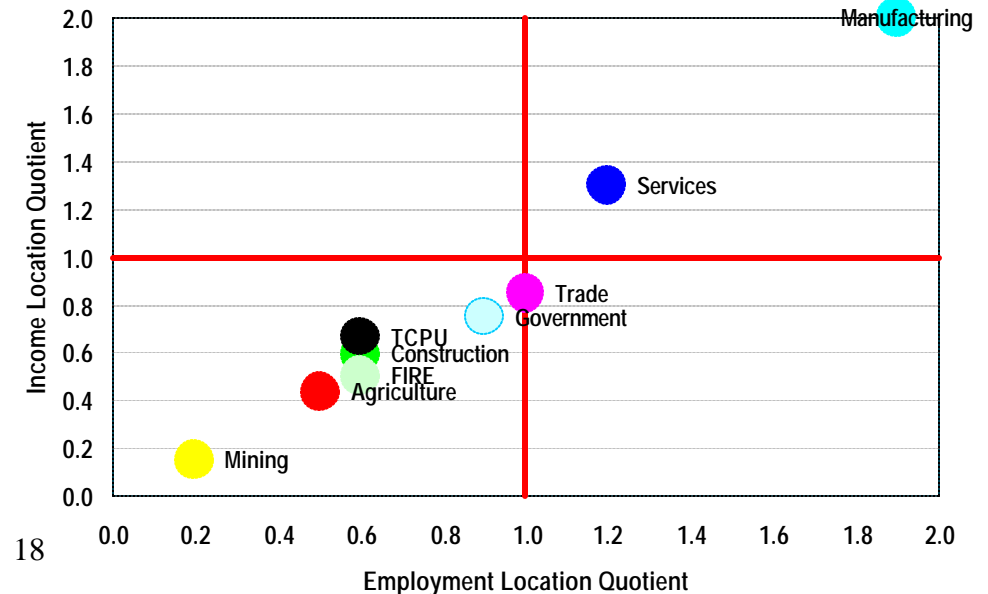
Boulder County Industry Growth 1991-2001

The chart below illustrates growth of the nine major industry sectors from 1991-2001. Compound annual growth rates (CAGR) are used. From 1991-2001 total state employment grew at a CAGR of 3.6%, and the Denver/Boulder CPI grew at a CAGR of 3.5%. The chart is divided into quadrants based on these values. The upper right-hand quadrant includes industries in the county that had employment growth greater than the state average and income growth greater than the CPI.



Boulder County Industry Concentration 2001

The chart below illustrates concentration of the nine major industry sectors in 2001. Location quotients (LQ) are used to measure the concentration of an industry in the county relative to the state. An LQ greater than 1 means the county has a high concentration in that industry. The chart is divided into quadrants. The upper right-hand quadrant includes industries with high employment concentration and income concentration.



BOULDER COUNTY SECTOR BREAKDOWN				
Sector	Number of Workers	Total Production (M)	% of Production Exported	Value of Exports (M)
Top 10 Sectors by Employment				
Computer and Data Processing Services	26,424	\$3,226.1	83%	\$2,677.7
State & Local Government - Education	15,326	604.5	0	0.0
Eating & Drinking	14,253	569.9	30	171.0
Miscellaneous Retail	8,915	296.1	11	32.6
Wholesale Trade	7,628	1,278.7	9	115.1
State & Local Government - Non-Education	7,573	346.6	0	0.0
Real Estate	7,133	1,594.5	59	940.8
Computer Storage Devices	6,469	1,114.2	88	980.5
Personnel Supply Services	6,236	148.6	6	8.9
Research Development & Testing Ser	5,877	481.7	75	361.3
Top Sectors by Production				
Computer and Data Processing Services	26,424	\$3,226.1	83%	\$2,677.7
Communications Except Radio and TV	3,572	2,125.6	77	1,636.7
Real Estate	7,133	1,594.5	59	940.8
Computer Peripheral Equipment N.E.C.	1,354	1,383.6	87	1,203.7
Wholesale Trade	7,628	1,278.7	9	115.1
Computer Storage Devices	6,469	1,114.2	88	980.5
New Residential Structures	4,078	664.9	0	0.0
State & Local Government - Education	15,326	604.5	0	0.0
Top Primary Sectors				
Computer and Data Processing Services	26,424	\$3,226.1	83%	\$2,677.7
Communications Except Radio and TV	3,572	2,125.6	77	1,636.7
Computer Peripheral Equipment N.E.C.	1,354	1,383.6	87	1,203.7
Computer Storage Devices	6,469	1,114.2	88	980.5
Pharmaceuticals	2,390	554.6	66	366.0
Other Business Services	4,903	569.6	64	364.5
Research Development & Testing Services	5,877	481.7	75	361.3
Miscellaneous Plastics Products	951	177.8	100	177.8
Semiconductors and Related Devices	1,144	258.1	61	157.4

Source: Minnesota IMPLAN Group, Inc. (2000)

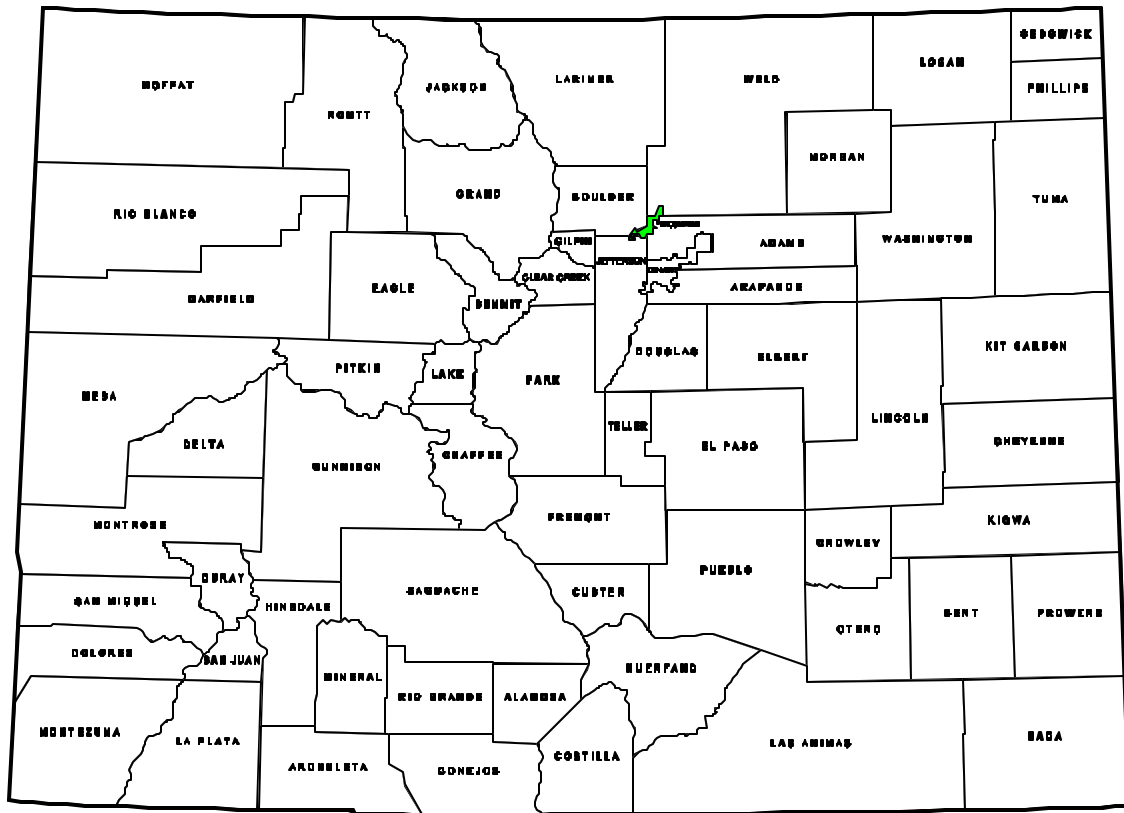
Industry Summary

- Boulder County has a vibrant and diverse economy.
- The largest employers are computer related. Consequently, there has been a surge in wealth from the technology sector. This led to residual wealth coming from the housing market. Other industries are storage devices (hard drives), research development and testing, pharmaceutical manufacturing, and several business services.
- The county's concentration ratios point to manufacturing (which includes high-tech manufacturing) and services as relatively strong. Fast growing sectors are TCPU and construction.
- Traditional industries such as agriculture, food processing, and mining are declining in the county as developers build office parks and neighborhoods in the plains surrounding the city of Boulder.

BOULDER COUNTY - CURRENT, TARGET, AND EMERGING GROWTH INDUSTRIES*

	Current	Target	Growth	Comments
Agriculture				Overall, Boulder County has a diverse economy. The county produces barley, sugar beets, corn, hay, dry beans, sunflowers, and wheat, as well as cattle. Total value of agricultural products sold in 1997 was \$43,671,000. Boulder is second in the state in the number of dairy operations and is home to the third largest poultry processing company. The relative importance of agriculture in Boulder County has decreased in the past decade and is expected to continue to decline in the future due, in part, to rising land prices.
Animals	X			
Crops	X			
Dairy	X			The concentration of manufacturing is almost twice that of the state average. Nationally, manufacturing is expected to continue to decline in relative importance as greater efficiencies are gained and certain manufacturing is sent off shore. The critical mass of computer storage companies in the county presents an opportunity for growth. Similarly, the cluster of photonics companies should prosper as the international economy improves.
Manufacturing				
General	X	X		
Computer Hardware/Storage	X	X	X	About 28% of the state's computer manufacturing employees and over 90% of the computer storage workers are employed in Boulder County. This strong cluster is the basis for future growth in this sector. Industries based on the natural resources in Boulder County are not expected to provide strong opportunities for growth. The primary drivers of the environmental industry are bioremediation developed from the cleanup of Rocky Flats, a strong recycling industry, and research conducted at CU and private companies.
Photonics	X	X	X	
Energy and Environmental				
Minerals, Gas/Petroleum	X			While Boulder County is in close enough proximity to enjoy the benefits of DIA and the trucking and warehousing companies in the north metro area, transportation industries are not expected to be areas of growth for Boulder County in the next 5 to 10 years.
Renewable Energy	X	X		
Environmental Industries	X	X		
Transportation				A cluster of space/aerospace companies has developed in Boulder County as a result of the prominence of research conducted at CU. Further development of this cluster will allow for the industry to become an emerging industry. There are a minimal number of employees who work in the national defense NAICS sector in Boulder County and growth is anticipated in select areas such as remote sensing and digital imaging.
Air				
Trucking				
Rail				Telecommunications area is expected to grow, although not at the same rate as during the 1990s. About half of the state's biotech companies currently reside in Boulder County. The state's cluster will show areas of strength surrounding each of the state's major research universities (UCHSC, CU, and CSU).
General				
Aerospace/Space	X	X	X	
Defense/Homeland Security	X	X		Because of the county's strength in manufacturing, it is well-suited to serve as a focal point for medical device manufacturing.
Telecommunications	X	X		
Biotechnology	X	X	X	
Nanotechnology	X	X	X	While there are existing call centers, this area is unlikely to grow significantly due to the higher than average wage and cost structure. Growth of the healthcare and financial industries is expected to be at a rate less than the state.
Services				
Call Centers	X			
Financial	X			One-half of the state's jobs in scientific and research organizations are in Boulder County. This combined with research at federal labs and CU foster high-technology growth. The prominence of high-tech industries will create the need for increased software development in the future.
Healthcare	X	X		
Research and Development	X	X	X	
Software	X	X	X	Boulder is not considered a destination resort; however, it benefits from the tourism industry because of its proximity to Rocky Mountain National Park, casinos, and ski areas.
Tourism	X	X		
Film	X	X	X	The creative climate within the City of Boulder lends itself to activity in the film industry. Thirteen projects were filmed in Boulder County in 2002. A majority of the commercials, television shorts, and features took advantage of foothills scenery throughout the county, contributing to the possibility of film production growth.

BROOMFIELD COUNTY



THIS ANALYSIS OF BROOMFIELD COUNTY IS FORMATTED DIFFERENTLY THAN OTHER COUNTIES IN THIS STUDY BECAUSE THE COUNTY WAS FORMED IN NOVEMBER 2001.

BROOMFIELD COUNTY RESOURCES

Transportation

Commercial Service Airports: none (adjacent to Jeffco Airport and easy access to DIA).

General Aviation Airports: none

Reliever Airports: none

Interstate Highway Miles: 2.75; excluding the newly opened Northwest Parkway.

Military Bases, Federal Facilities, and Prisons

Military Base: none

Federal Facilities: none

State Prisons: none

Higher Education (Main Campus)

Four Year: none

Two Year: none

Private Acc.: none

Tourist Attractions

Ski Areas: none

Casinos: none

National Parks: none

BROOMFIELD COUNTY OVERVIEW			
	Broomfield County	Colorado	US
People			
Population, 2001 estimate	40,309	4,417,714	284.8 M
Population percent change, 2000 to 2001	5.3%	2.7%	1.2%
Population, percent change, 1990 to 2000	55.3%	30.6%	13.1%
Persons under 18 years old, percent, 2000	15.8%	25.6%	25.7%
Persons 65 years old and over, percent, 2000	6.6%	9.7%	12.4%
White persons, percent, 2000	88.6%	82.8%	75.1%
Persons of Hispanic or Latino origin, percent, 2000*	9.1%	17.1%	12.5%
Black or African American persons, percent, 2000	1.1%	3.8%	12.3%
American Indian and Alaska Native persons, percent, 2000	1.2%	1.0%	0.9%
Asian persons, percent, 2000	4.8%	2.2%	3.6%
Persons reporting some other race, percent, 2000	4.2%	7.2%	5.5%
Bachelor's degree or higher, pct of persons age 25+, 2000	37.9%	32.7%	24.4%
Mean travel time to work, workers age 16+ (minutes), 2000	27.4	24.3	25.5
Median household money income, 2000	\$63,903	\$47,203	\$41,994
Geography			
Land area, 2000 (square miles)	34	103,718	3.5 M
Persons per square mile, 2000	1,125.6	41.5	79.6
*Hispanics may be of any race, so also are included in applicable race categories			
Source: Census Bureau			

COUNTY ASSETS

	Broomfield	Boulder	Adams	Arapahoe	Clear Creek	Denver	Douglas	Gilpin	Jefferson
Commercial Airport						X			
General Aviation Airport		X		X					
Reliever Airport			X	X					X
Interstate Highway	X		X	X	X	X	X		X
State Prison			X						X
Federal Facility		X				X			X
Military Facility			X	X					
Two-year College/University		X	X	X		X	X		X
Four-year College/University		X	X	X		X			X
Private College/University	X	X	X	X		X	X		X
>25% of Pop. with Bachelor Degree	X	X		X	X	X	X	X	X
>10,000 employees	X	X	X	X		X	X		X
Companies w/ 500+ employees	X	X	X	X		X	X	X	X
Manufacturing Shipments (1997)	NA	X	X	X		X	X		X
Ski Resorts		X			X				
Casinos			X	X				X	
National Parks/Sites		X							
Oil, Gas, CO ₂ Production		X	X	X		X			
Coal Production									
Wind Energy									
Biomass Energy Potential									

Broomfield County Highlights

Population

- Broomfield County is a densely populated area and has experienced rapid growth.

Income

- Median household income for Broomfield County is well above the state average.

Transportation Infrastructure

- Broomfield County is in close proximity to the state's interstate system, DIA, and Jeffco Airport.

State, Federal, or Military Facilities

- There are no state prisons, federal labs, or military bases located in the county, but Broomfield is in close proximity to the facilities located in Boulder, and the Denver Metro area.

Education

- There are several branch campuses located in the county, moreover, Broomfield is close enough to Boulder and Denver that there are significant higher education opportunities nearby. The county's work force is highly educated.

Attractions

- While Broomfield is not a destination resort area, notable tourism attractions are located in the county or in neighboring counties.

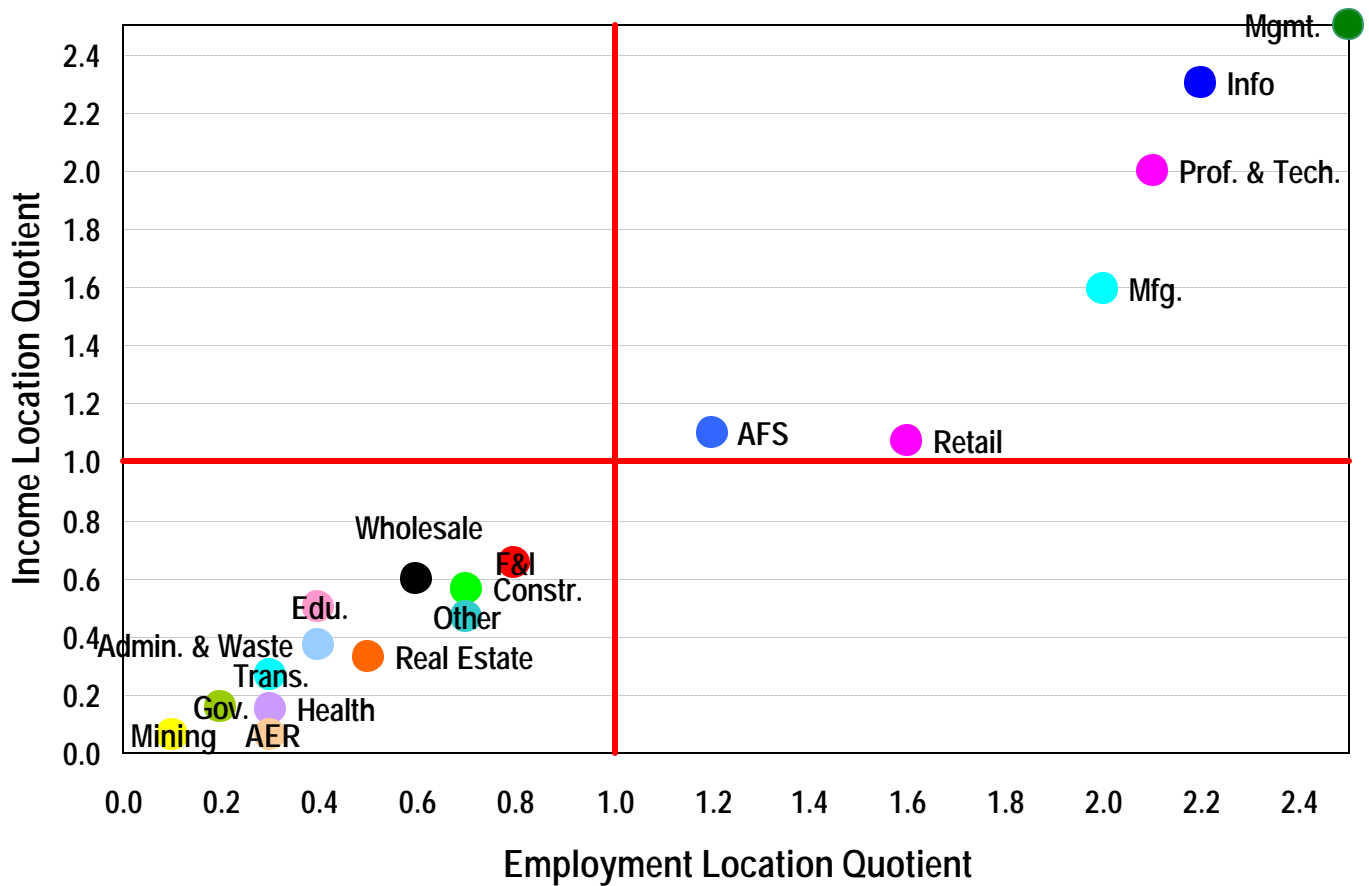
ANALYSIS OF EMPLOYMENT AND WAGES IN BROOMFIELD COUNTY

Employment and Wages (2002)					Location Quotient (2002)					
Employment			Wages (Millions)			Employment			Wages	
		Share			Share					
Retail Trade	4,594	18.0%	Professional & Technical	312.7	25.0%	Management	4.56	Management	4.20	
Professional & Technical	3,947	15.5	Information	273.7	21.8	Information	2.65	Information	3.03	
Manufacturing	3,854	15.1	Manufacturing	197.6	15.8	Professional & Technical	2.35	Professional & Technical	2.36	
Accommodation & Food	2,983	11.7	Retail Trade	96.3	7.7	Manufacturing	1.96	Manufacturing	1.59	
Information	2,930	11.5	Management	85.5	6.8	Retail Trade	1.60	Retail Trade	1.07	
Construction	1,335	5.2	Construction	50.1	4.0	Accommodation & Food	1.23	Accommodation & Food	1.01	
Management	1,019	4.0	Finance & Insurance	48.8	3.9	Construction	0.70	Finance & Insurance	0.57	
Government	832	3.3	Accommodation & Food	44.1	3.5	Finance and Insurance	0.68	Wholesale Trade	0.53	
Finance & Insurance	823	3.2	Wholesale Trade	40.5	3.2	Other Services	0.67	Construction	0.52	
Health Care	641	2.5	Government	32.5	2.6	Wholesale Trade	0.56	Other Services	0.47	
Wholesale Trade	634	2.5	Health Care	19.5	1.6	Real Estate	0.53	Educational	0.46	
Administrative & Waste	617	2.4	Administrative & Waste	17.7	1.4	Educational	0.52	Real Estate	0.33	
Other Services	529	2.1	Other Services	12.7	1.0	Administrative & Waste	0.40	Administrative & Waste	0.32	
Real Estate	284	1.1	Real Estate	7.8	0.6	Health Care	0.29	Transportation	0.20	
Transportation	211	0.8	Transportation	7.2	0.6	Transportation	0.29	Health Care	0.19	
Educational	136	0.5	Educational	4.5	0.4	Government	0.21	Government	0.16	
Arts, Entertainment & Rec.	102	0.4	Arts, Entertainment, & Rec.	1.1	0.1	Arts, Entertainment, & Rec.	0.21	Arts, Entertainment, & Rec.	0.06	
Natural Resources & Mining	8	0.0	Natural Resources & Mining	0.5	0.0	Natural Resources & Mining	0.05	Natural Resources & Mining	0.04	
Utilities	0	0.0	Utilities	0.0	0.0	Utilities	0.00	Utilities	0.00	
Agriculture	D	--	Agriculture	D	--	Agriculture	--	Agriculture	--	

Source: Colorado Department of Labor and Employment – ES202 data.

Broomfield County Industry Concentration 2002

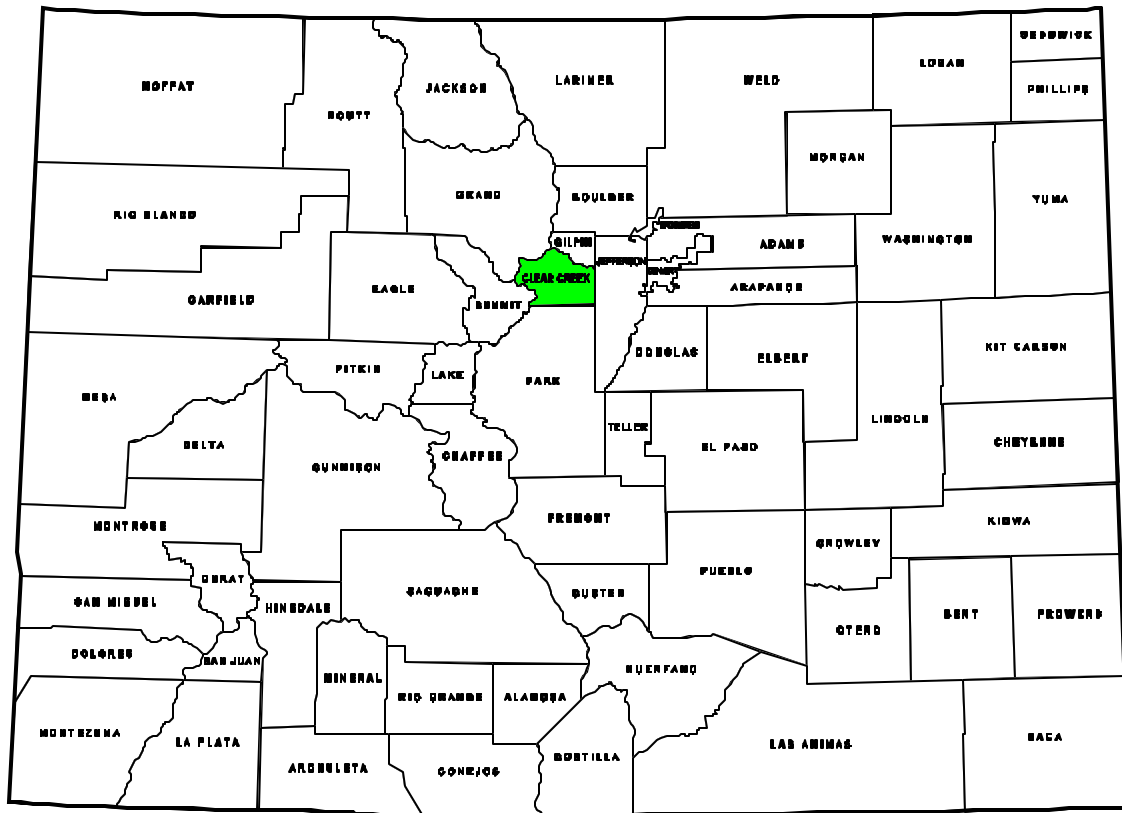
The chart below illustrates concentration of the twenty major industry sectors as defined by the National Industrial Classification System (NAICS). The Data used is ES202 Employment and Wage Data for 2002 provided by the Colorado Department of Labor and Employment. Due to data availability constraints, this data is not comparable to the data used for the other 63 counties in Colorado. However, it still gives a good idea of the make up of Broomfield County's economy. Location quotients (LQ) are used to measure the concentration of an industry in the county relative to the state. An LQ greater than 1 means the county has a high concentration in that industry. The chart is divided into quadrants. The upper right-hand quadrant includes industries with high employment concentration and income concentration.



BROOMFIELD COUNTY - CURRENT, TARGET, AND EMERGING GROWTH INDUSTRIES*

	Current	Target	Growth	Comments
Agriculture				Due to the lack of open land in the area, agriculture does not play a role in the Broomfield County Economy.
Animals				
Crops				
Dairy				
Manufacturing				The concentration of manufacturing is almost twice that of the state average. Nationally, manufacturing is expected to continue to decline in relative importance as greater efficiencies are gained and certain manufacturing is sent off shore. The critical mass of computer storage companies in the general area presents an opportunity for growth. Similarly, the cluster of photonics companies in Boulder County should present an opportunity to attract companies from this industry. About 28% of the state's computer manufacturing employees and over 90% of the computer storage workers are employed in Boulder County. This strong cluster is the basis for future growth in this sector in surrounding areas, including Broomfield County.
General	X	X	X	
Computer Hardware/Storage	X	X	X	
Photonics	X	X	X	
Energy and Environmental				The primary drivers of the environmental industry are bioremediation developed from the cleanup of Rocky Flats, a strong recycling industry, and research conducted at CU and private companies.
Minerals, Gas/Petroleum				
Renewable Energy				Transportation is not a contributor to the county economy, however, the county is in close enough proximity to major interstates and airports to provide transportation infrastructure to support manufacturing and other sectors.
Environmental Industries	X			
Transportation				A cluster of space/aerospace companies has developed in Boulder County as a result of the prominence of research conducted at CU. Further development of this cluster will allow for the industry to become an emerging industry. Again Broomfield County should benefit from activity in Boulder County. Telecommunications area is expected to grow, although not at the same rate as during the 1990s. About half of the state's biotech companies currently reside in Boulder County. The state's cluster will show areas of strength surrounding each of the state's major research universities (UCHSC, CU, and CSU). Because of the county's strength in manufacturing, it is well suited to serve as a focal point for medical device manufacturing.
Air				
Trucking				
Rail				
General				Growth in the healthcare and financial industries is expected to be driven by population growth in the county.
Aerospace/Space	X	X	X	
Defense/Homeland Security	X	X		
Telecommunications	X	X		
Biotechnology	X	X	X	One-half of the state's jobs in scientific and research organizations are in nearby Boulder County. This combined with research at federal labs and CU foster high-technology growth. The prominence of high-tech industries will create the need for increased software development in the future. In the longer term, development of nanotechnology capabilities could result in new products and improve existing products manufactured in Broomfield County. The county's close proximity to these research organizations provides the opportunity for future high-technology growth .
Nanotechnology	X	X	X	
Services				
Call Centers				
Financial	X	X		There are no tourist attractions in Broomfield County. Their tourism industry is a result of business travelers.
Healthcare	X	X		
Research and Development	X	X	X	
Software	X	X	X	
Tourism	X	X		
Film				

CLEAR CREEK COUNTY



CLEAR CREEK COUNTY RESOURCES

Transportation

Commercial Service Airports: none

General Aviation Airports: none

Reliever Airports: none

Interstate Highway Miles: 33.3

Military Bases, Federal Facilities, and Prisons

Military Base: none

Federal Facilities: none

State Prisons: none

Higher Education (Main Campus)

Four Year: none

Two Year: none

Private Acc.: none

Ski Areas, Casinos, and National Parks

Ski Areas: Loveland

Casinos/Gaming: none

National Parks/Sites: none

Natural Resources

Oil Production (Barrels of Oil): 0

Gas Production (Million Cubic Feet): 0

Coal Production (Short Tons): 0

CO2 Production (Million Cubic Feet): 0

Wind Level Rating (5=Outstanding, 4=Good): <4

Biomass Energy Potential: <2,500,001 mmbtu

CLEAR CREEK COUNTY OVERVIEW			
	Clear Creek County	Colorado	US
People			
Population, 2001 estimate	9,440	4,417,714	284.8 M
Population percent change, April 1, 2000-July 1, 2001	1.3%	2.7%	1.2%
Population, percent change, 1990 to 2000	22.4%	30.6%	13.1%
Persons under 18 years old, percent, 2000	22.6%	25.6%	25.7%
Persons 65 years old and over, percent, 2000	7.1%	9.7%	12.4%
White persons, percent, 2000	96.4%	82.8%	75.1%
Persons of Hispanic or Latino origin, percent, 2000*	3.9%	17.1%	12.5%
Black or African American persons, percent, 2000	0.3%	3.8%	12.3%
American Indian and Alaska Native persons, percent, 2000	0.7%	1.0%	0.9%
Asian persons, percent, 2000	0.4%	2.2%	3.6%
Persons reporting some other race, percent, 2000	1.0%	7.2%	5.5%
High school graduates, percent of persons age 25+, 2000	93.4%	86.9%	80.4%
Bachelor's degree or higher, pct of persons age 25+, 2000	38.8%	32.7%	24.4%
Mean travel time to work, workers age 16+ (minutes), 2000	32.6	24.3	25.5
Homeownership rate, 2000	76.1%	67.3%	66.2%
Median value of owner-occupied housing units, 2000	\$200,400	\$166,600	\$119,600
Median household money income, 1999	\$50,997	\$47,203	\$41,994
Per capita money income, 1999	\$28,160	\$24,049	\$21,587
Persons below poverty, percent, 1999	5.4%	9.3%	12.4%
Business			
Federal funds and grants, 2001 (\$1,000)	21,468	24,344,658	1.8 B
Geography			
Land area, 2000 (square miles)	395	103,718	3.5 M
Persons per square mile, 2000	23.6	41.5	79.6
Note: *Hispanics may be of any race, so also are included in applicable race categories.			

ESTABLISHMENTS BY SIZE CLASS		
Size Class	Number	Percent
1-4 Employees	245	71.8%
5-9 Employees	48	14.1%
10-19 Employees	26	7.6%
20-49 Employees	14	4.1%
50-99 Employees	5	1.5%
100-249 Employees	1	0.3%
250-499 Employees	2	0.6%
500-999 Employees	0	0.0%
1,000+ Employees	0	0.0%
Total	341	100.0%

HOUSEHOLDS BY INCOME LEVELS		
Income Bracket	Number	Percent
<\$10,000	211	5.2%
\$10,000 to \$19,999	335	8.3%
\$20,000 to \$29,999	443	11.0%
\$30,000 to \$39,999	468	11.6%
\$40,000 to \$49,999	494	12.3%
\$50,000 to \$59,999	440	10.9%
\$60,000 to \$74,999	416	10.3%
\$75,000 to \$99,999	510	12.7%
\$100,000 to \$124,999	331	8.2%
\$125,000 to \$149,999	126	3.1%
\$150,000 to \$199,000	147	3.6%
\$200,000+	107	2.7%
Total	4,028	99.9%

OCCUPATIONS BY TYPE		
Occupation type	Number	Percent
Management, Professional, and Related	2,242	39.6%
Service	930	16.4%
Sales and Office	1,280	22.6%
Farming, Fishing, and Forestry	32	0.6%
Construction, Extraction, and Maintenance	696	12.3%
Production, Trans., and Material Moving	481	8.5%

WORKERS BY CLASS		
Worker Class	Number	Percent
Private	4,086	72.2%
Government	922	16.3%
Self Employed Non-Inc.	649	11.5%
Unpaid Family	4	0.1%

Source: U.S. Census Bureau - County Quickfacts, 2001 County Business Patterns, and 2000 Census Summary File 3.

COUNTY ASSETS

	Clear Creek	Adams	Arapahoe	Boulder	Broomfield	Denver	Douglas	Gilpin	Jefferson
Commercial Airport						X			
General Aviation Airport			X	X					
Reliever Airport		X	X						X
Interstate Highway	X	X	X		X	X	X		X
State Prison		X							X
Federal Facility				X		X			X
Military Facility		X	X						
Two-year College/University		X	X	X		X	X		X
Four-year College/University		X	X	X		X			X
Private College/University		X	X	X	X	X	X		X
>25% of Pop. with Bachelor Degree	X		X	X	X	X	X	X	X
>10,000 employees		X	X	X	X	X	X		X
Companies w/ 500+ employees		X	X	X	X	X	X	X	X
Manufacturing Shipments (1997)		X	X	X	NA	X	X		X
Ski Resorts	X			X					
Casinos/Gaming		X	X					X	
National Parks/Sites				X					
Oil, Gas, CO ₂ Production		X	X	X		X			
Coal Production									
Wind Energy									
Biomass Energy Potential									

Clear Creek County Highlights

Population

- With about 10,000 residents, Clear Creek is a sparsely populated county.

Income and Housing

- Incomes and the cost of housing are high. Houses are \$34,000 more expensive than the state median, and family incomes are \$4,000 higher than the median income.

Occupation, Class of Work, Establishment Size

- There are 3 businesses with 100+ employees. Most of the population works in the recreation services and roadside service industry.

Transportation Infrastructure

- Interstate 70 flows through the county, and recreational commuters create very heavy traffic along this corridor.

State, Federal, or Military Facilities

- No major government facilities.

Education

- Primary and secondary only.

Attractions

- Loveland Ski Area resides in Clear Creek. The county is the gateway between the Front Range urban area and Colorado's Playground in Summit, Eagle, and Grand Counties. The Mount Evans Scenic Byway is a popular attraction.

Natural Resources

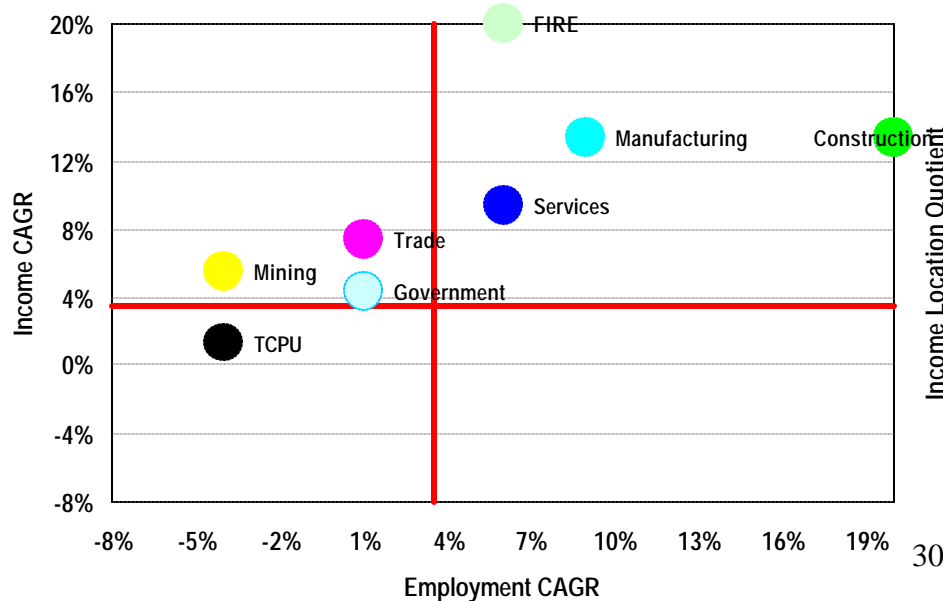
- There are no major fossil resources, but significant reserves of iron ores and other minerals exist.

HISTORICAL ANALYSIS OF EMPLOYMENT AND INCOME CLEAR CREEK COUNTY													
Employment and Income (2001)						CAGR 1991 to 2001				Location Quotient (2001)			
Employment			Income			Employment		Income		Employment		Income	
		Share			Share								
Services	1,025	29.5%	OGM	\$41,397	29.9%	Con.	26.1%	FIRE	26.3%	OGM	18.84	OGM	17.51
Trade	810	23.3	Services	26,101	18.8	Mfg.	9.3	Ag.	17.5	Gov.	1.39	Gov.	1.18
Gov.	683	19.7	Gov.	24,317	17.5	FIRE	6.3	Con.	13.4	Trade	1.08	Trade	1.01
OGM	410	11.8	Trade	20,111	14.5	Services	6.3	Mfg.	13.4	Con.	0.99	FIRE	0.91
Con.	275	7.9	FIRE	11,907	8.6	Gov.	1.4	Services	9.4	Services	0.93	Con.	0.63
FIRE	116	3.3	Con.	7,406	5.3	Trade	1.4	Trade	7.4	FIRE	0.45	Services	0.62
Mfg.	91	2.6	Mfg.	3,802	2.7	OGM	-3.6	OGM	5.5	Mfg.	0.35	Mfg.	0.29
TCPU	50	1.4	TCPU	3,126	2.3	TCPU	-3.6	Gov.	4.4	TCPU	0.25	TCPU	0.23
Ag.	9	0.3	Ag.	451	0.3	Ag.		TCPU	1.3	Ag.	0.10	Ag.	0.23

Source: DOLA – Colorado Employment by Sector.

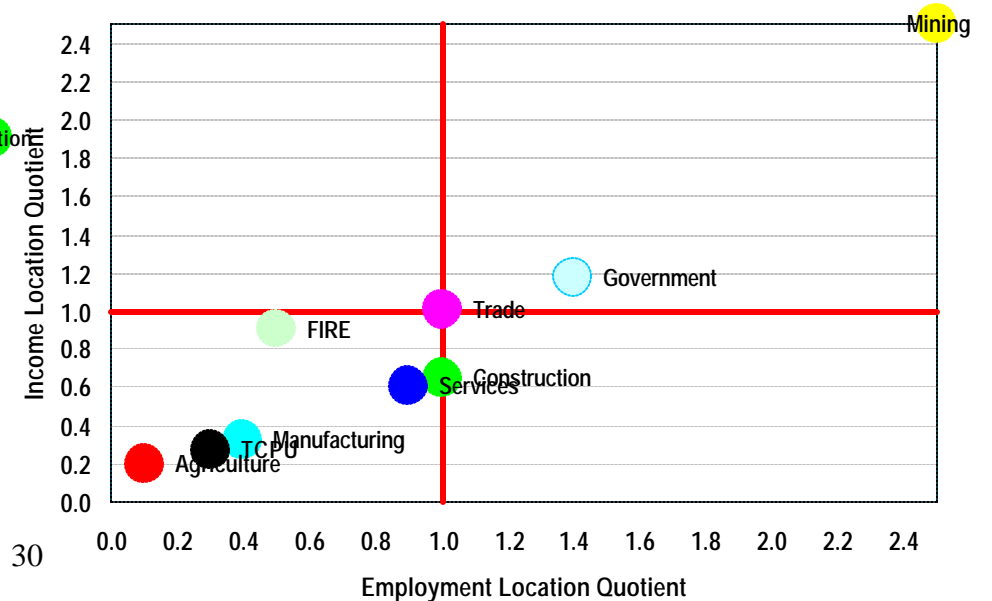
Clear Creek County Industry Growth 1991-2001

The chart below illustrates growth of the nine major industry sectors from 1991-2001. Compound annual growth rates (CAGR) are used. From 1991-2001 total state employment grew at a CAGR of 3.6%, and the Denver/Boulder CPI grew at a CAGR of 3.5%. The chart is divided into quadrants based on these values. The upper right-hand quadrant includes industries in the county that had employment growth greater than the state average and income growth greater than the CPI.



Clear Creek County Industry Concentration 2001

The chart below illustrates concentration of the nine major industry sectors in 2001. Location quotients (LQ) are used to measure the concentration of an industry in the county relative to the state. An LQ greater than 1 means the county has a high concentration in that industry. The chart is divided into quadrants. The upper right-hand quadrant includes industries with high employment concentration and income concentration.



CLEAR CREEK COUNTY SECTOR BREAKDOWN				
Sector	Number of Workers	Total Production (M)	% of Production Exported	Value of Exports (M)
Top 10 Sectors by Employment				
Eating & Drinking	605	\$23.9	54%	\$12.9
Ferroalloy Ores, Except Vanadium	530	10.4	100	10.4
Amusement and Recreation Services	498	16.2	88	14.3
State & Local Government - Education	306	10.5	0	0.0
State & Local Government - Non-Education	301	13.1	0	0.0
Miscellaneous Retail	281	6.7	0	0.0
Real Estate	265	59.8	72	43.1
Wholesale Trade	210	19.5	9	1.8
New Residential Structures	208	32.2	0	0.0
Maintenance and Repair, Other Facilities	182	10.6	46	4.9
Top Sectors by Production				
Real Estate	265	59.8	72	43.1
New Residential Structures	208	32.2	0	0.0
Iron Ores	0	29.9	100	29.9
Eating & Drinking	605	23.9	54	12.9
Wholesale Trade	210	19.5	9	1.8
Amusement and Recreation Services	498	16.2	88	14.3
New Industrial and Commercial Buildings	136	15.7	0	0.0
State & Local Government - Non-Education	301	13.1	0	0.0
Top Primary Sectors				
Real Estate	265	\$59.8	72%	\$43.1
Amusement and Recreation Services	498	16.2	88	14.3
Eating & Drinking	605	23.9	54	12.9
Ferroalloy Ores, Except Vanadium	530	10.4	100	10.4
Hotels and Lodging Places	119	6.1	46	2.8
New Highways and Streets	36	3.9	56	2.2
Transportation Equipment, N.E.C.	10	2.1	100	2.1
Commercial Printing	27	2.1	95	2.0

Source: Minnesota IMPLAN Group, Inc. (2000)

Industry Summary

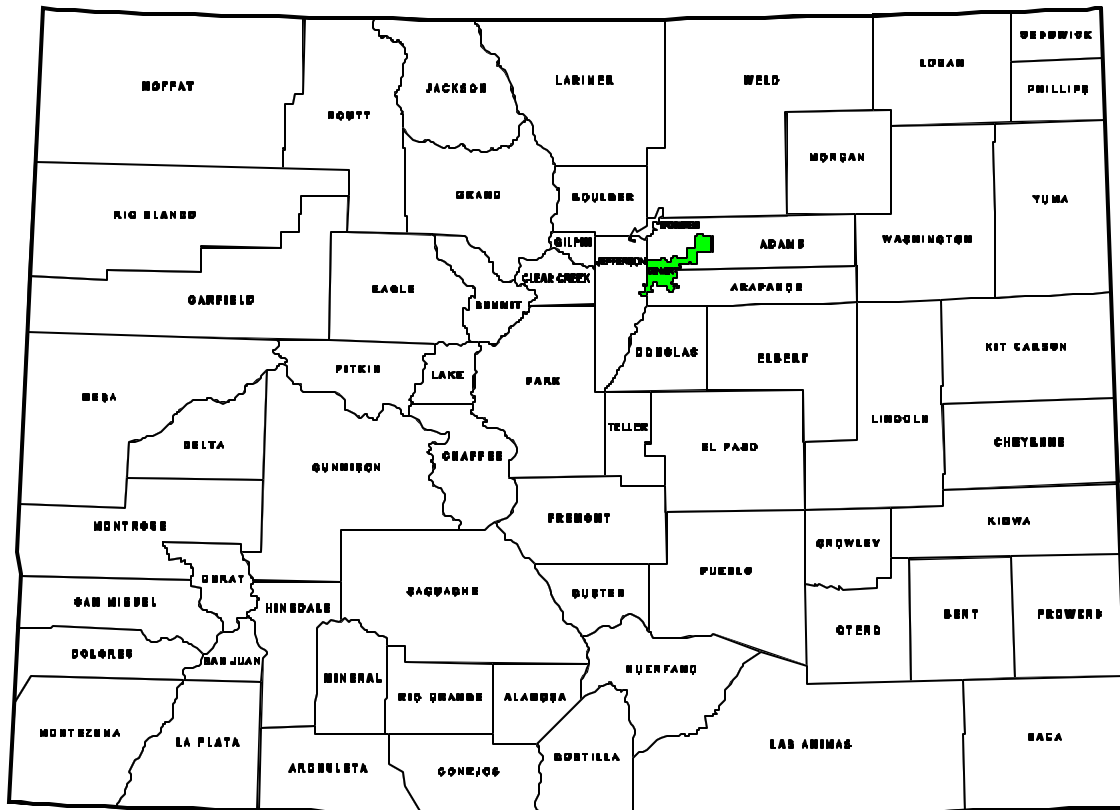
- Clear Creek County has a rich history related to gold and silver mining, as well as a general history as the “wild west.” The county is now a major corridor between the Front Range and the ski and summer resorts located in Grand, Summit, and Eagle Counties.
- The main industries are mining and services. Recreation and road-side services employ the most people in the county, accounting for about one-third of total employment. Governmental and education activities are the second largest employer, offering about 19% of the employment. Mining is still responsible for a substantial portion of the private sector output and employment.
- Most of the activity centers around Idaho Springs, Georgetown, and Silver Plume.
- By far the fastest growing sector in the county is construction.

CLEAR CREEK COUNTY - CURRENT, TARGET, AND EMERGING GROWTH INDUSTRIES*

	Current	Target	Growth	Comments
Agriculture				Clear Creek County is a small rural mountain county located just west of the Denver metropolitan area. Many in the highly educated population commute to jobs in Boulder, Golden, and other metro communities, or work as "lone eagles" in small entrepreneurial home-based ventures.
Animals				
Crops				
Dairy				Clear Creek has no reported agricultural industry.
Manufacturing				Famous for its rich gold mining history, mining remains one of the dominant industries in Clear Creek County. According to the DOLA base industry study, mining accounts for 8.5% of the basic jobs in the county. Today, Clear Creek mines produce primarily molybdenum, and iron ores.
General				
Computer Hardware/Storage				
Photonics				
Energy and Environmental				Cluster industries such as biotechnology, software, aerospace, defense, and nanotechnology have a minimal presence in Clear Creek County, and it is unlikely that their presence will increase significantly in the near term. However, these industries are concentrated in nearby Boulder and metro area counties, providing commuter jobs for some of the county's highly educated population.
Minerals, Gas/Petroleum	X	X		
Renewable Energy				
Environmental Industries				
Transportation				Extension of broadband services from the MNT hub in the county could provide modest growth opportunities for a variety of local businesses.
Air				
Trucking				Clear Creek County has a small base of employees who provide professional business services. While Clear Creek County is a popular site to visit, its population has increased at a rate well below that of the state.
Rail				
General				
Aerospace/Space				Tourism is a large part of the economy in Clear Creek County. Loveland Ski Area and Mount Evans Scenic Byway are located in the county. The resort communities in Summit, Eagle, and Grand Counties and the casinos in Gilpin County are nearby. The county also offers an array of outdoor recreational activities such as hiking and biking. Historic Georgetown provides a taste of Colorado's mining past. According to the DOLA base industry study, 23.3% of the county's basic jobs are tourism related.
Defense/Homeland Security				
Telecommunications				
Biotechnology				There were four projects filmed in the county during 2002. Some filming is expected in the future.
Nanotechnology				
Services				
Call Centers				
Financial				
Healthcare				
Research and Development				
Software				
Tourism	X	X		
Film	X	X		

*Note: Definition of current target and emerging growth industry included in introduction to this section.

DENVER COUNTY



DENVER COUNTY RESOURCES

Transportation

Commercial Service Airports: Denver International Airport

General Aviation Airports: none

Reliever Airports: none

Interstate Highway Miles: 29.64

Military Bases, Federal Facilities, and Prisons

Military Base: none

Federal Facilities: U.S. Mint, various Federal Courts and Regional Offices

State Prisons: none

Higher Education (Main Campus)

Four Year: Metropolitan State College of Denver, CU-Denver, CU Health Sciences Center

Two Year: C C of Denver, Emily Griffith Opportunity School

Private Acc.: Art Institute of Colorado, Colorado Technical University, Denver Seminary, University of Denver, Illif School of Theology, ISIM University, National Theatre Conservatory, Regis University, Johnson and Wales, Teikyo Loretto Heights University, University of Phoenix

Ski Areas, Casinos, and National Parks

Ski Areas: none

Casinos/Gaming: none

National Parks/Sites: none

Natural Resources

Oil Production (Barrels of Oil): 15561

Gas Production (Million Cubic Feet): 331696

Coal Production (Short Tons): 0

CO2 Production (Million Cubic Feet): 0

Wind Level Rating (5=Outstanding, 4=Good): <4

Biomass Energy Potential: <2,500,001 mmbtu

DENVER COUNTY OVERVIEW			
	Denver County	Colorado	US
People			
Population, 2001 estimate	554,446	4,417,714	284.8 M
Population percent change, April 1, 2000-July 1, 2001	0.0%	2.7%	1.2%
Population, percent change, 1990 to 2000	18.6%	30.6%	13.1%
Persons under 18 years old, percent, 2000	22.0%	25.6%	25.7%
Persons 65 years old and over, percent, 2000	11.3%	9.7%	12.4%
White persons, percent, 2000	65.3%	82.8%	75.1%
Persons of Hispanic or Latino origin, percent, 2000*	31.7%	17.1%	12.5%
Black or African American persons, percent, 2000	11.1%	3.8%	12.3%
American Indian and Alaska Native persons, percent, 2000	1.3%	1.0%	0.9%
Asian persons, percent, 2000	2.8%	2.2%	3.6%
Persons reporting some other race, percent, 2000	15.6%	7.2%	5.5%
High school graduates, percent of persons age 25+, 2000	78.9%	86.9%	80.4%
Bachelor's degree or higher, pct of persons age 25+, 2000	34.5%	32.7%	24.4%
Mean travel time to work, workers age 16+ (minutes), 2000	24.5	24.3	25.5
Homeownership rate, 2000	52.5%	67.3%	66.2%
Median value of owner-occupied housing units, 2000	\$165,800	\$166,600	\$119,600
Median household money income, 1999	\$39,500	\$47,203	\$41,994
Per capita money income, 1999	\$24,101	\$24,049	\$21,587
Persons below poverty, percent, 1999	14.3%	9.3%	12.4%
Business			
Federal funds and grants, 2001 (\$1,000)	5,379,105	24,344,658	1.8 B
Geography			
Land area, 2000 (square miles)	153	103,718	3.5 M
Persons per square mile, 2000	3,616.80	41.5	79.6

Note: *Hispanics may be of any race, so also are included in applicable race categories.

ESTABLISHMENTS BY SIZE CLASS		
Size Class	Number	Percent
1-4 Employees	11,693	52.7%
5-9 Employees	3,890	17.5%
10-19 Employees	2,866	12.9%
20-49 Employees	2,200	9.9%
50-99 Employees	854	3.9%
100-249 Employees	466	2.1%
250-499 Employees	127	0.6%
500-999 Employees	49	0.2%
1,000+ Employees	30	0.1%
Total	22,175	99.9%

HOUSEHOLDS BY INCOME LEVELS		
Income Bracket	Number	Percent
<\$10,000	24,286	10.1%
\$10,000 to \$19,999	30,096	12.6%
\$20,000 to \$29,999	34,243	14.3%
\$30,000 to \$39,999	32,443	13.6%
\$40,000 to \$49,999	25,189	10.5%
\$50,000 to \$59,999	21,044	8.8%
\$60,000 to \$74,999	22,668	9.5%
\$75,000 to \$99,999	21,836	9.1%
\$100,000 to \$124,999	11,085	4.6%
\$125,000 to \$149,999	5,577	2.3%
\$150,000 to \$199,000	4,912	2.1%
\$200,000+	6,036	2.5%
Total	239,415	100.0%

OCCUPATIONS BY TYPE		
Occupation type	Number	Percent
Management, Professional, and Related	107,703	37.9%
Service	43,284	15.2%
Sales and Office	74,909	26.3%
Farming, Fishing, and Forestry	430	0.2%
Construction, Extraction, and Maintenance	28,343	10.0%
Production, Trans., and Material Moving	29,671	10.4%

WORKERS BY CLASS		
Worker Class	Number	Percent
Private	228,117	80.2%
Government	38,023	13.4%
Self Employed Non-Inc.	17,494	6.2%
Unpaid Family	706	0.2%

Source: U.S. Census Bureau - County Quickfacts, 2001 County Business Patterns, and 2000 Census Summary File 3.

COUNTY ASSETS

	Denver	Arapahoe	Adams	Boulder	Broomfield	Clear Creek	Douglas	Gilpin	Jefferson
Commercial Airport	X								
General Aviation Airport		X		X					
Reliever Airport		X	X						X
Interstate Highway	X	X	X		X	X	X		X
State Prison			X						X
Federal Facility	X			X					X
Military Facility		X	X						
Two-year College/University	X	X	X	X			X		X
Four-year College/University	X	X	X	X					X
Private College/University	X	X	X	X	X		X		X
>25% of Pop. with Bachelor Degree	X	X		X	X	X	X	X	X
>10,000 employees	X	X	X	X	X		X		X
Companies w/ 500+ employees	X	X	X	X	X		X	X	X
Manufacturing Shipments (1997)	X	X	X	X	NA		X		X
Ski Resorts				X		X			
Casinos		X	X					X	
National Parks/Sites				X					
Oil, Gas, CO ₂ Production	X	X	X	X					
Coal Production									
Wind Energy									
Biomass Energy Potential									

Denver County Highlights

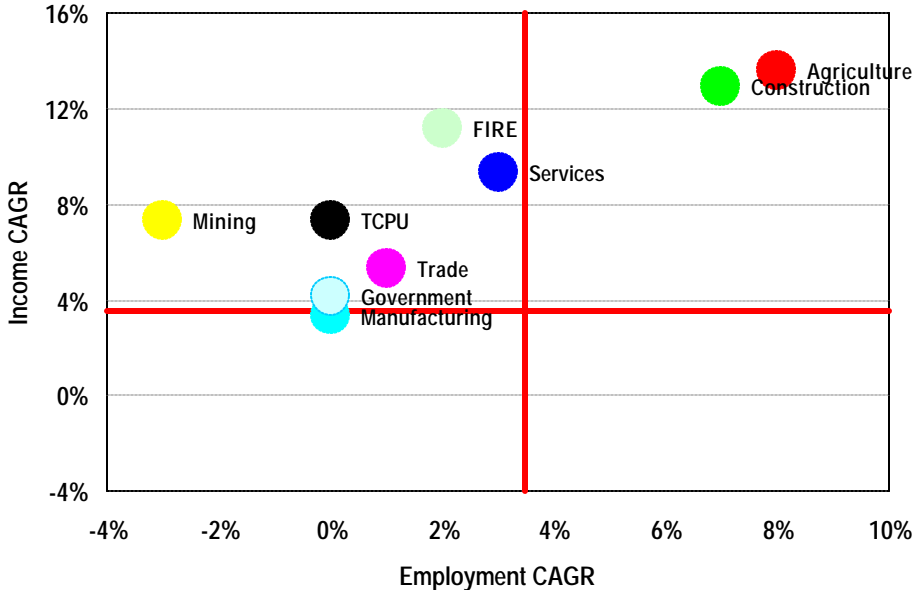
- Population
- The City and County of Denver is densely populated, at 3,600 people per square mile versus 41.5 for the state. The population is limited by the existing land mass, and the population grew half as fast as the state during the past decade.
- Income and Housing
- Housing and income are commensurate with the state average.
 - Income is stratified between high-wage metropolitan workers and low-wage urban service providers. The median wage is, however, about the same as the state average.
- Occupation, Class of Work, Establishment Size
- About 37% of Denver workers commute from throughout the region to Denver. Occupations are mostly management and other professional. This varies from most other counties, where services are the largest type of work.
- Transportation Infrastructure
- Denver is served by a regional public transportation system, including 14 miles of light-rail system. Denver International Airport is the seventh busiest airport in the country.
- State, Federal, or Military Facilities
- The state capital is located here, along with other state facilities and several Federal Courts and Region 8 Offices.
- Education
- There are numerous higher education opportunities available in Denver County.
- Attractions
- Professional and college sports, museums, arts centers, a new convention center, and many other urban cultural events, attractions, and resources are in Denver.
- Natural Resources
- Although Denver County has some oil reserves, the land above the oil well is often more valuable than the oil reserves.

HISTORICAL ANALYSIS OF EMPLOYMENT AND INCOME DENVER COUNTY													
Employment and Income (2001)					CAGR 1991 to 2001				Location Quotient (2001)				
Employment			Income		Employment		Income		Employment		Income		
		Share		Share									
Services	207,145	37.2%	Services	\$9,544,106	33.6%	Ag.	8.3%	Ag.	13.3%	OGM	1.64	OGM	1.89
Trade	102,340	18.4	TCPU	4,141,719	14.6	Con.	7.3	Con.	13.2	TCPU	1.43	TCPU	1.46
Gov.	73,622	13.2	Gov.	3,748,218	13.2	Services	3.3	FIRE	11.2	FIRE	1.38	FIRE	1.36
FIRE	57,514	10.3	FIRE	3,620,007	12.8	FIRE	2.2	Services	9.3	Services	1.17	Services	1.11
TCPU	46,354	8.3	Trade	3,400,696	12.0	Trade	1.3	OGM	7.3	Gov.	0.93	Gov.	0.89
Mfg.	33,220	6.0	Con.	1,492,190	5.3	Gov.	0.3	TCPU	7.3	Trade	0.85	Trade	0.83
Con.	27,868	5.0	Mfg.	1,425,293	5.0	Mfg.	0.3	Trade	5.3	Mfg.	0.80	Con.	0.62
OGM	5,733	1.0	OGM	915,858	3.2	TCPU	0.3	Gov.	4.2	Con.	0.62	Mfg.	0.53
Ag.	3,245	0.6	Ag.	96,375	0.3	OGM	-2.7	Mfg.	3.3	Ag.	0.20	Ag.	0.24

Source: DOLA – Colorado Employment by Sector.

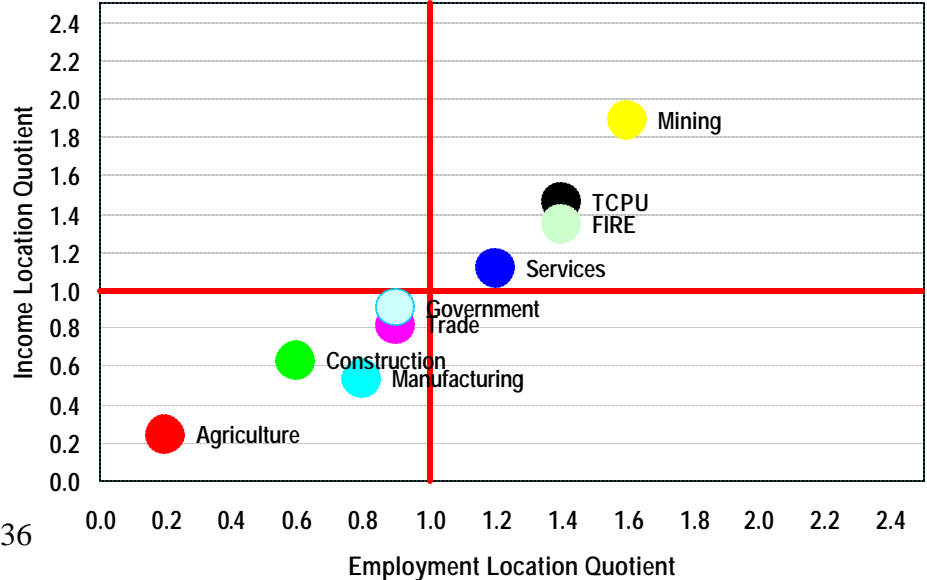
Denver County Industry Growth 1991-2001

The chart below illustrates growth of the nine major industry sectors from 1991-2001. Compound annual growth rates (CAGR) are used. From 1991-2001 total state employment grew at a CAGR of 3.6%, and the Denver/Boulder CPI grew at a CAGR of 3.5%. The chart is divided into quadrants based on these values. The upper right-hand quadrant includes industries in the county that had employment growth greater than the state average and income growth greater than the CPI.



Denver County Industry Concentration 2001

The chart below illustrates concentration of the nine major industry sectors in 2001. Location quotients (LQ) are used to measure the concentration of an industry in the county relative to the state. An LQ greater than 1 means the county has a high concentration in that industry. The chart is divided into quadrants. The upper right-hand quadrant includes industries with high employment concentration and income concentration.



DENVER COUNTY SECTOR BREAKDOWN				
Sector	Number of Workers	Total Production (M)	% of Production Exported	Value of Exports (M)
Top 10 Sectors by Employment				
State & Local Government - Non-Education	38,701	\$2,380.0	0%	\$0.0
Wholesale Trade	35,026	4,586.6	46	2,109.8
Eating & Drinking	28,866	1,309.8	32	419.1
Credit Agencies	24,333	551.2	68	374.8
Air Transportation	17,198	2,129.8	89	1,895.5
Miscellaneous Retail	16,886	648.6	10	64.9
Communications, Except Radio and TV	15,786	8,629.9	82	7,076.5
State & Local Government - Education	15,367	575.8	0	0.0
Real Estate	15,174	3,927.5	51	2,003.0
Personnel Supply Services	14,830	390.8	9	35.2
Top Sectors by Production				
Communications, Except Radio and TV	15,786	\$8,629.9	82%	\$7,076.5
Wholesale Trade	35,026	4,586.6	46	2,109.8
Real Estate	15,174	3,927.5	51	2,003.0
Natural Gas & Crude Petroleum	8,336	2,772.7	80	2,218.2
State & Local Government - Non-Education	38,701	2,380.0	0	0.0
Security and Commodity Brokers	10,139	2,201.0	54	1,188.5
Air Transportation	17,198	2,129.8	89	1,895.5
Computer and Data Processing Services	14,611	1,617.6	31	501.5
New Residential Structures	9,012	1,497.0	0	0.0
Top Primary Sectors				
Communications, Except Radio and TV	15,786	\$8,629.9	82%	\$7,076.5
Natural Gas & Crude Petroleum	8,336	2,772.7	80	2,218.2
Air Transportation	17,198	2,129.8	89	1,895.5
Security and Commodity Brokers	10,139	2,201.0	54	1,188.5
Insurance Carriers	6,865	1,471.2	71	1,044.6
Legal Services	14,038	1,440.9	65	936.6
Bottled and Canned Soft Drinks	1,609	545.2	99	539.7
Motion Pictures	4,553	854.6	59	504.2
Credit Agencies	24,333	551.2	68	374.8
Commercial Sports Except Racing	2,127	429.7	73	313.7

Source: Minnesota IMPLAN Group, Inc. (2000)

Industry Summary

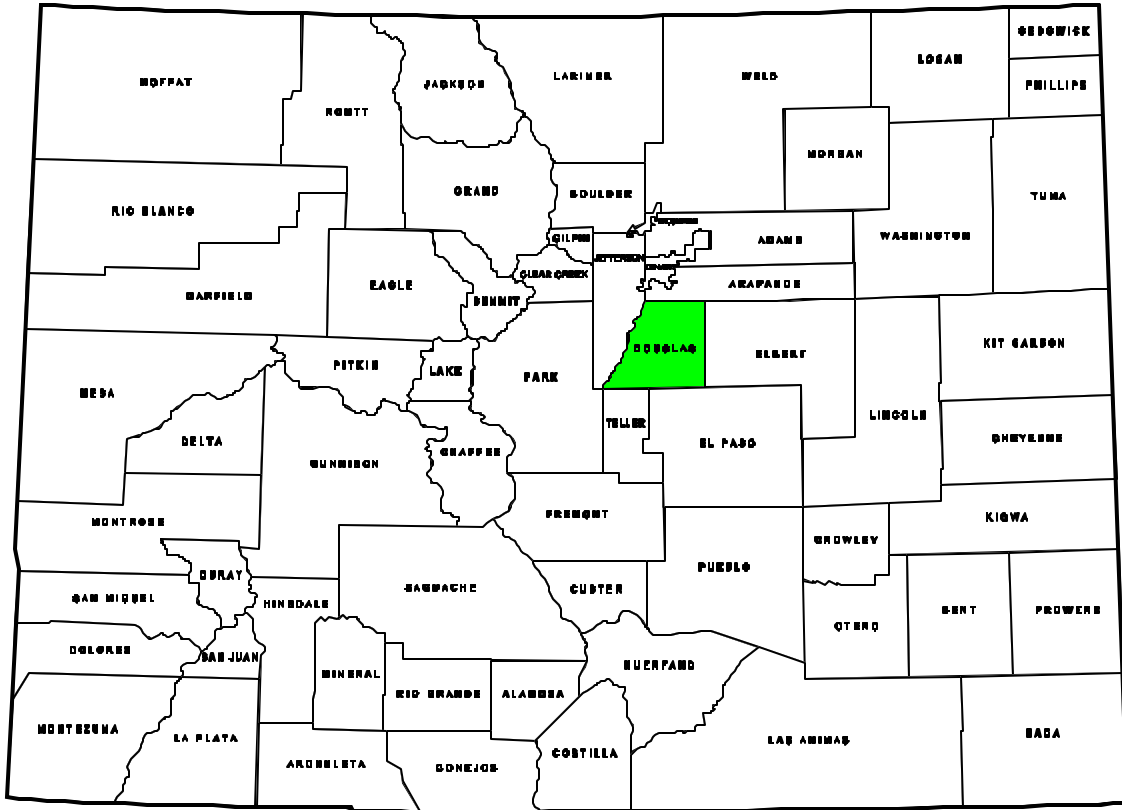
- As a large urban center, Denver's industry is highly diverse.
- The state government is the largest employer in Denver County. Many workers in the county are corporate employees who are in the management, professional, and highly paid services industries. Denver is a financial center for the region.
- Communications is the top primary sector.
- Denver International Airport (a major air hub), professional and collegiate sports, and various corporate headquarters are located here.
- As the state's population grows, we expect the Denver economy to expand in order to provide the services required for a dynamic and growing area.

DENVER COUNTY - CURRENT, TARGET, AND EMERGING GROWTH INDUSTRIES*

	Current	Target	Growth	Comments
Agriculture				Denver is an urban area producing some crops with a 1997 market value of \$2,166,000. The county has developed eight farmer's markets offering specialty crop growers higher revenues by selling direct to the consumer. Denver is headquarters for some of the state's largest cheese producers and several dairy operations.
Animals				
Crops	X			
Dairy	X			There are opportunities for growth in food, printing and related support activities, fabricated metal products, furniture and related product manufacturing, miscellaneous manufacturing, plastics and rubber, computer manufacturing, and non-metallic mineral products. About 8% of photonics companies are located in Denver County. About 30% of the state's extractive industry employees are headquartered in Denver County. For example, Newmont Mining, the world's largest gold mining company is located in Denver, although it does not mine in Colorado.
Manufacturing				
General	X			
Computer Hardware/Storage				Because DIA is located in Denver County, transportation is a critical component of the county economy. About 53% of county transportation employees work in air transportation. About 90% of the state's air transportation employees work in Denver County. About one-third of the state's trucking employees work in Denver County. About 35% of employees in the National Defense NAICS sector work in Denver County; however, growth has decreased in recent years. About 26% of the state's telecommunications employees work in Denver County. Denver County is home to some biomedical and medical device companies. It offers the highly educated workforce, proximity to research, and services needed to foster growth of the industry. Denver County has a large percentage of the state's call centers; however, employment has declined in recent years. The area could continue as a call center location. The telecom infrastructure is very strong, and universities and colleges provide a source of inexpensive labor. About 27% of the state's finance and insurance (F&I) employees work in Denver County. F&I wages for Denver County are about 27% greater than the state average. Opportunities for growth may exist in the mutual fund industry or alternative financial tools. Although 22% of the state's health-care employees currently work in Denver County, the transition of the University of Colorado Health Sciences Center to the Fitzsimons campus will impact this sector. Over time, nanotechnology research could create new products and transform existing products manufactured in the county. Denver was named 13 th in the nation in 2001 for software employment relative to overall population by the Software & Information Industry Association based in Washington D.C. Museums, arts centers, shopping malls, and cultural activities, along with major sports teams, are located in the county. The expansion of the convention center and the trend toward shorter and more frequent trips support growth in this area. More than 100 film projects of all types were produced in the county during 2002. Strong growth is projected for filming in the county due to the large variety of locations downtown and in surrounding areas.
Photonics	X	X	X	
Energy and Environmental				
Minerals, Gas/Petroleum	X	X		
Renewable Energy				
Environmental Industries	X			
Transportation				
Air	X	X	X	
Trucking	X	X		
Rail				
General				
Aerospace/Space				
Defense/Homeland Security	X	X		
Telecommunications	X	X		
Biotechnology	X	X	X	
Nanotechnology		X	X	
Services				
Call Centers	X	X		
Financial	X	X	X	
Healthcare	X			
Research and Development	X			
Software	X	X	X	
Tourism	X	X	X	
Film	X	X	X	

*Note: Definition of current target and emerging growth industry included in introduction to this section.

DOUGLAS COUNTY



DOUGLAS COUNTY RESOURCES

Transportation

Commercial Service Airports: none

General Aviation Airports: none

Reliever Airports: none

Interstate Highway Miles: 31.6

Military Bases, Federal Facilities, and Prisons

Military Base: none

Federal Facilities: none

State Prisons: none

Higher Education (Main Campus)

Four Year: none

Two Year: none

Private Acc.: none

Ski Areas, Casinos, and National Parks

Ski Areas: none

Casinos/Gaming: none

National Parks/Sites: none

Natural Resources

Oil Production (Barrels of Oil): 0

Gas Production (Million Cubic Feet): 0

Coal Production (Short Tons): 0

CO2 Production (Million Cubic Feet): 0

Wind Level Rating (5=Outstanding, 4=Good): <4

Biomass Energy Potential: <2,500,001 mmbtu

DOUGLAS COUNTY OVERVIEW			
	Douglas County	Colorado	US
People			
Population, 2001 estimate	199,753	4,417,714	284.8 M
Population percent change, April 1, 2000-July 1, 2001	13.6%	2.7%	1.2%
Population, percent change, 1990 to 2000	191.0%	30.6%	13.1%
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Persons 65 years old and over, percent, 2000	4.2%	9.7%	12.4%
White persons, percent, 2000	92.8%	82.8%	75.1%
Persons of Hispanic or Latino origin, percent, 2000*	5.1%	17.1%	12.5%
Black or African American persons, percent, 2000	1.0%	3.8%	12.3%
American Indian and Alaska Native persons, percent, 2000	0.4%	1.0%	0.9%
Asian persons, percent, 2000	2.5%	2.2%	3.6%
Persons reporting some other race, percent, 2000	1.4%	7.2%	5.5%
High school graduates, percent of persons age 25+, 2000	97.0%	86.9%	80.4%
Bachelor's degree or higher, pct of persons age 25+, 2000	51.9%	32.7%	24.4%
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Homeownership rate, 2000	87.9%	67.3%	66.2%
Median value of owner-occupied housing units, 2000	\$236,000	\$166,600	\$119,600
Median household money income, 1999	\$82,929	\$47,203	\$41,994
Per capita money income, 1999	\$34,848	\$24,049	\$21,587
Persons below poverty, percent, 1999	2.1%	9.3%	12.4%
Business			
Federal funds and grants, 2001 (\$1,000)	184,294	24,344,658	1.8 B
Geography			
Land area, 2000 (square miles)	840	103,718	3.5 M
Persons per square mile, 2000	209.2	41.5	79.6
Note: *Hispanics may be of any race, so also are included in applicable race categories.			

ESTABLISHMENTS BY SIZE CLASS		
Size Class	Number	Percent
1-4 Employees	2,710	64.0%
5-9 Employees	652	15.4%
10-19 Employees	439	10.4%
20-49 Employees	273	6.4%
50-99 Employees	86	2.0%
100-249 Employees	60	1.4%
250-499 Employees	9	0.2%
500-999 Employees	3	0.1%
1,000+ Employees	1	0.0%
Total	4,233	99.9%

HOUSEHOLDS BY INCOME LEVELS		
Income Bracket	Number	Percent
<\$10,000	1,002	1.6%
\$10,000 to \$19,999	1,716	2.8%
\$20,000 to \$29,999	2,415	4.0%
\$30,000 to \$39,999	3,409	5.6%
\$40,000 to \$49,999	4,176	6.8%
\$50,000 to \$59,999	4,918	8.1%
\$60,000 to \$74,999	8,470	13.9%
\$75,000 to \$99,999	12,515	20.5%
\$100,000 to \$124,999	8,621	14.1%
\$125,000 to \$149,999	4,967	8.1%
\$150,000 to \$199,000	4,560	7.5%
\$200,000+	4,260	7.0%
Total	61,029	100.0%

OCCUPATIONS BY TYPE		
Occupation type	Number	Percent
Management, Professional, and Related	50,228	51.8%
Service	7,893	8.1%
Sales and Office	28,756	29.7%
Farming, Fishing, and Forestry	98	0.1%
Construction, Extraction, and Maintenance	5,371	5.5%
Production, Trans., and Material Moving	4,583	4.7%

WORKERS BY CLASS		
Worker Class	Number	Percent
Private	80,031	82.6%
Government	9,887	10.2%
Self Employed Non-Inc.	6,706	6.9%
Unpaid Family	305	0.3%

Source: U.S. Census Bureau - County Quickfacts, 2001 County Business Patterns, and 2000 Census Summary File 3.

COUNTY ASSETS

	Douglas	Arapahoe	Adams	Boulder	Broomfield	Clear Creek	Denver	Gilpin	Jefferson
Commercial Airport							X		
General Aviation Airport		X		X					
Reliever Airport		X	X						X
Interstate Highway	X	X	X		X	X	X		X
State Prison			X						X
Federal Facility				X			X		X
Military Facility		X	X						
Two-year College/University	X	X	X	X			X		X
Four-year College/University		X	X	X			X		X
Private College/University	X	X	X	X	X		X		X
>25% of Pop. with Bachelor Degree	X	X		X	X	X	X	X	X
>10,000 employees	X	X	X	X	X		X		X
Companies w/ 500+ employees	X	X	X	X	X		X	X	X
Manufacturing Shipments (1997)	X	X	X	X	NA		X		X
Ski Resorts				X		X			
Casinos		X	X					X	
National Parks/Sites				X					
Oil, Gas, CO ₂ Production		X	X	X			X		
Coal Production									
Wind Energy									
Biomass Energy Potential									

Douglas County Highlights

Population

- Douglas County is located in central Colorado south of Denver. It is a fast growing community. Its population percent change from 1990 to 2000 was almost 200%. From 2000 to 2001 its population growth rate was 13.6%. These rates are 6 times the state averages. This makes Douglas County the fastest growing Colorado county in the past decade.

Income and Housing

- Douglas County's median household income is roughly twice the state average. Over 70% of its residents have a household income between \$60,000 and \$200,000+ annually.
- The median home price is about \$70,000 above the state average.

Occupation, Class of Work, Establishment Size

- Douglas County has a wide range of establishment sizes (Most tend to be small employers, with 90% having less than 20 employees). Its largest employment sectors are credit agencies, eating and drinking, and merchandise stores.

Transportation Infrastructure

- There are no airports in Douglas County; however, Douglas County has easy access to both Colorado Springs and Denver airports. I-25, C-470 and E-470 provide easy access to Denver and Colorado Springs.

State, Federal, or Military Facilities

- There are no state prisons, federal facilities, or military bases in Douglas County.

Education

- There are several branch campuses in Douglas County. Roughly 97% of its occupants are high school graduates and 52% have a bachelor's degree or higher. These rates are significantly higher than the state and national averages.

Attractions

- There are no attractions in Douglas County other than state parks and open space areas.

Natural Resources

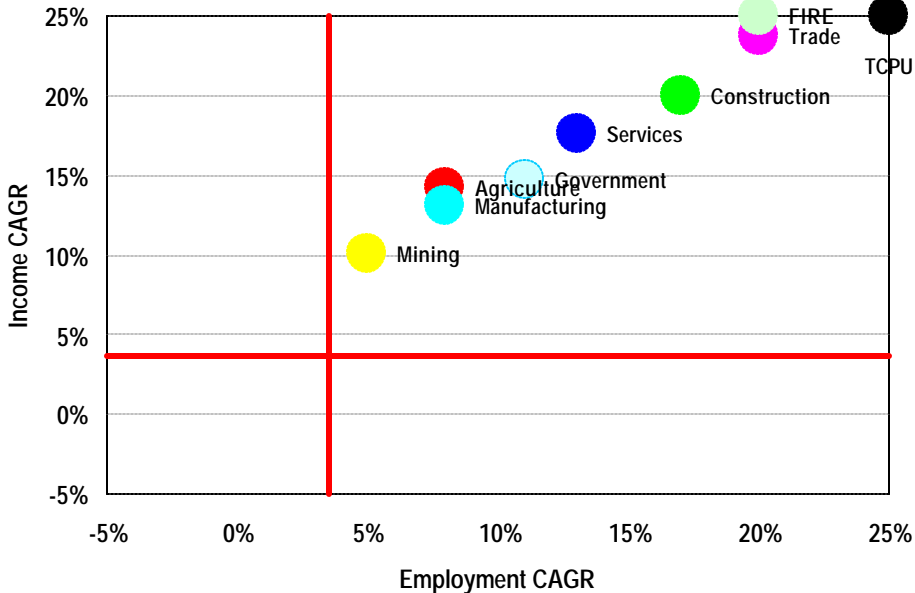
- There are no natural resources in Douglas County.

HISTORICAL ANALYSIS OF EMPLOYMENT AND INCOME DOUGLAS COUNTY													
Employment and Income (2001)						CAGR 1991 to 2001				Location Quotient (2001)			
Employment			Income			Employment		Income		Employment		Income	
		Share			Share								
Trade	24,546	31.2%	Services	\$726,403	26.0%	TCPU	33.1%	TCPU	30.7%	TCPU	1.57	Con.	1.98
Services	17,874	22.7	Trade	646,293	23.2	Trade	20.6	FIRE	28.3	Con.	1.54	Trade	1.61
Con.	9,744	12.4	Con.	471,004	16.9	FIRE	19.9	Trade	24.6	Trade	1.45	Ag.	1.43
Gov.	7,880	10.0	Gov.	311,274	11.2	Con.	17.0	Con.	20.0	Ag.	1.31	FIRE	0.90
TCPU	7,187	9.1	FIRE	237,426	8.5	Services	12.5	Services	17.6	FIRE	0.97	Services	0.86
FIRE	5,713	7.3	TCPU	210,064	7.5	Gov.	10.5	Ag.	14.4	Services	0.71	TCPU	0.76
Ag.	3,040	3.9	Mfg.	123,539	4.4	Ag.	8.2	Gov.	14.4	Gov.	0.71	Gov.	0.75
Mfg.	2,537	3.2	Ag.	55,333	2.0	Mfg.	8.2	Mfg.	13.1	Mfg.	0.43	Mfg.	0.47
OGM	95	0.1	OGM	9,874	0.4	OGM	5.2	OGM	10.1	OGM	0.19	OGM	0.21

Source: DOLA – Colorado Employment by Sector.

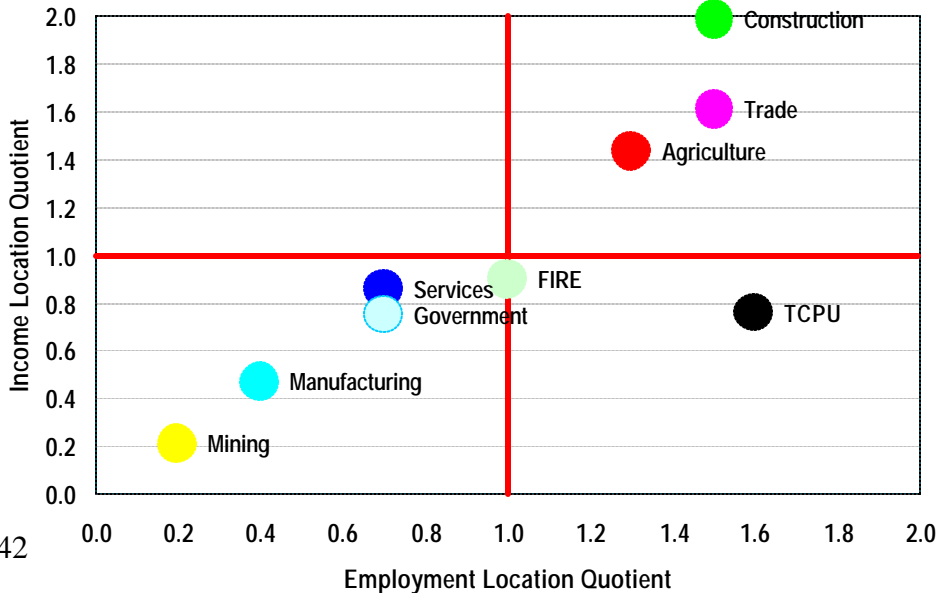
Douglas County Industry Growth 1991-2001

The chart below illustrates growth of the nine major industry sectors from 1991-2001. Compound annual growth rates (CAGR) are used. From 1991-2001 total state employment grew at a CAGR of 3.6%, and the Denver/Boulder CPI grew at a CAGR of 3.5%. The chart is divided into quadrants based on these values. The upper right-hand quadrant includes industries in the county that had employment growth greater than the state average and income growth greater than the CPI.



Douglas County Industry Concentration 2001

The chart below illustrates concentration of the nine major industry sectors in 2001. Location quotients (LQ) are used to measure the concentration of an industry in the county relative to the state. An LQ greater than 1 means the county has a high concentration in that industry. The chart is divided into quadrants. The upper right-hand quadrant includes industries with high employment concentration and income concentration.



DOUGLAS COUNTY SECTOR BREAKDOWN				
Sector	Number of Workers	Total Production (M)	% of Production Exported	Value of Exports (M)
Top 10 Sectors by Employment				
Credit Agencies	8,819	\$113.5	66%	\$74.9
Eating & Drinking	6,079	241.4	22	53.1
State & Local Government - Education	4,704	184.4	0	0.0
General Merchandise Stores	4,051	172.5	56	96.6
New Residential Structures	3,186	518.6	0	0.0
Miscellaneous Retail	3,089	88.3	0	0.0
Wholesale Trade	3,010	495.4	24	118.9
Maintenance and Repair, Other Facilities	2,788	198.1	70	138.7
Computer and Data Processing Services	2,662	292.1	67	195.7
New Industrial and Commercial Buildings	2,076	264.4	0	0.0
Top Sectors by Production				
Communications, Except Radio and TV	1,891	738.4	77	568.6
New Residential Structures	3,186	518.6	0	0.0
Wholesale Trade	3,010	495.4	24	118.9
Computer and Data Processing Services	2,662	292.1	67	195.7
New Industrial and Commercial Buildings	2,076	264.4	0	0.0
Eating & Drinking	6,079	241.4	22	53.1
Other Business Services	1,958	227.1	75	170.3
Top Primary Sectors				
Communications, Except Radio and TV	1,891	\$738.4	77%	\$568.6
Computer and Data Processing Services	2,662	292.1	67	195.7
Other Business Services	1,958	227.1	75	170.3
New Government Facilities	979	163.3	85	138.8
Maintenance and Repair, Other Facilities	2,788	198.1	70	138.7
New Highways and Streets	556	66.7	86	57.4
Concrete Products, N.E.C	308	46.0	99	45.5
Natural Gas & Crude Petroleum	189	49.9	81	40.4
Periodicals	438	37.8	92	34.8
Miscellaneous Metal Work	70	27.5	99	27.2

Source: Minnesota IMPLAN Group, Inc. (2000)

Industry Summary

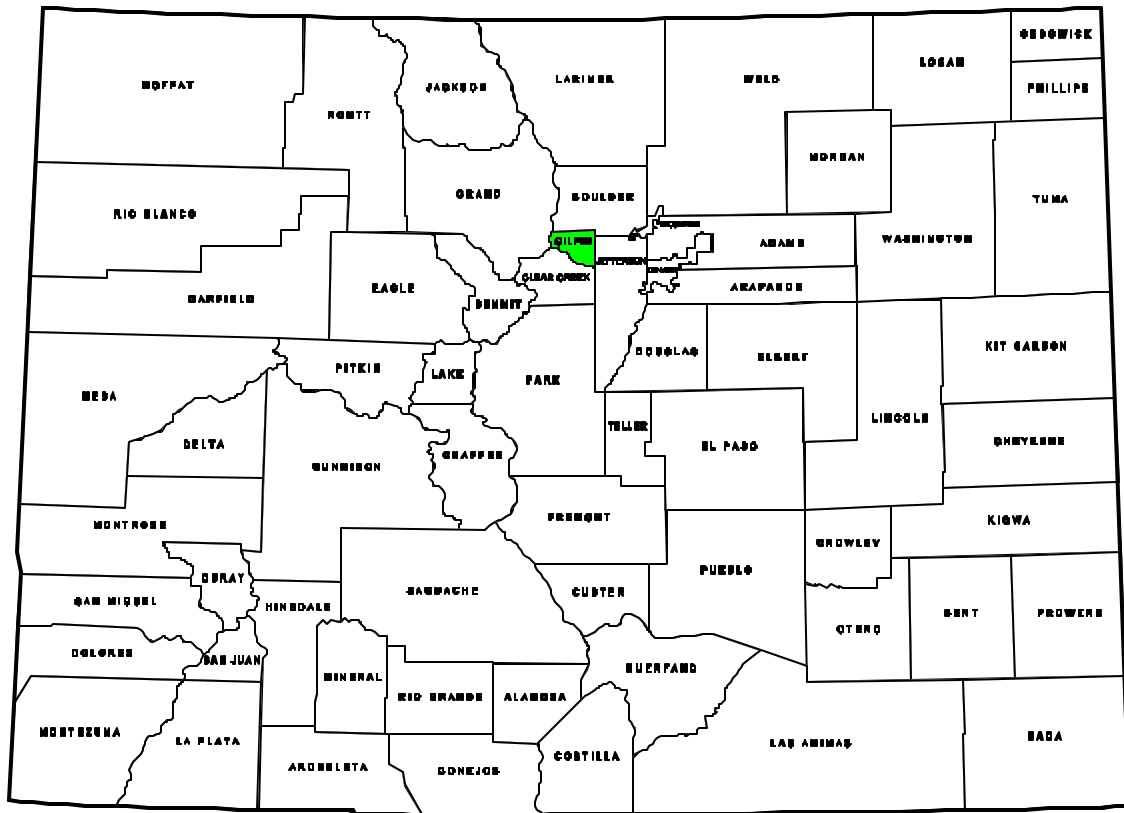
- Douglas County is geographically in the center of Colorado, located south of Denver. It is characterized by rolling plains and the Rocky Mountains. Over the past decade it has been the fastest growing county in Colorado, its population increasing by nearly 200% from 1990 to 2000.
- Correlated with high population growth, construction has been a large employer, especially compared with the rest of the state. New residential structures and new industrial and commercial buildings have also been large sectors for employment.
- TCPU, FIRE, and Trade industries experienced a 20-25% employment growth rate above the state average and a 25% income growth greater than the CPI.

DOUGLAS COUNTY - CURRENT, TARGET, AND EMERGING GROWTH INDUSTRIES*

	Current	Target	Growth	Comments
Agriculture				Douglas County produces some hay, winter wheat and cattle with a market value of \$17,119,000. The area has developed 7 farmer's markets providing specialty crop growers with higher revenues by selling direct to urban consumers. One market offers certified organic products to meet increasing consumer demand. There is only a small amount of food processing. While threatened by population growth and water limitations, efforts to maintain land in agricultural use should enable the county to retain an agricultural base.
Animals	X			
Crops	X			
Dairy				
Manufacturing				The manufacturing sector is small. There are opportunities to build on nonmetallic mineral product manufacturing, computer manufacturing and miscellaneous manufacturing. Currently there are a small number of photonics companies located in Douglas County. Aerospace has a small presence, but the county is strategically located between strong concentrations in Colorado Springs and the Denver metro area.
General	X			
Computer Hardware/Storage	X			
Photonics	X			
Energy and Environmental				About 11% of the state's telecommunications employees work in Douglas County. This industry is one of the largest subsectors in the county. Capabilities in cellular and wireless systems position this area for the growth sectors of this industry.
Minerals, Gas/Petroleum				
Renewable Energy				
Environmental Industries	X			
Transportation				Douglas County has a few biomedical and medical device firms. The area offers the highly educated workforce, and proximity to metro-area research and services needed to foster growth of the industry.
Air				
Trucking				There is a minor presence of call centers in Douglas County. However, this is not expected to be a growth area due to high wages and costs.
Rail				
General				
Aerospace/Space	X	X	X	Douglas County has had one of the fastest growing populations in the nation. As population growth continues, basic service industries such as healthcare and financial products will expand. However, availability of water may limit future residential growth and restrict expansion of these sectors.
Defense/Homeland Security				
Telecommunications	X	X	X	Major financial, credit, and electronic payment institutions exist in the county and should remain an important part of the future economy.
Biotechnology	X	X	X	
Nanotechnology				
Services				There are strengths in computer systems design and custom software development. The software sector could grow based on quality of life and location relative to industries that utilize software.
Call Centers	X			
Financial	X	X	X	Recreational activities are offered at golf courses, state parks and recreation areas, and open spaces located in the county. The Renaissance Festival attracts more than 180,000 visitors annually. Additional recreational and cultural opportunities are available in neighboring metro areas. A total of four film projects were done in the county during 2002, with half of them filmed at outdoor locations throughout the county. Growth is expected because of natural scenery throughout this foothills county and its close proximity to the Denver area.
Healthcare	X	X		
Research and Development	X			
Software	X	X	X	
Tourism	X	X		
Film	X	X	X	

*Note: Definition of current target and emerging growth industry included in introduction to this section.

GILPIN COUNTY



GILPIN COUNTY RESOURCES

Transportation

Commercial Service Airports: none

General Aviation Airports: none

Reliever Airports: none

Interstate Highway Miles: 0

Military Bases, Federal Facilities, and Prisons

Military Base: none

Federal Facilities: none

State Prisons: none

Higher Education (Main Campus)

Four Year: none

Two Year: none

Private Acc.: none

Ski Areas, Casinos, and National Parks

Ski Areas: none

Casinos/Gaming: 21 casinos in Black Hawk, 5 in Central City

National Parks/Sites: none

Natural Resources

Oil Production (Barrels of Oil): 0

Gas Production (Million Cubic Feet): 0

Coal Production (Short Tons): 0

CO2 Production (Million Cubic Feet): 0

Wind Level Rating (5=Outstanding, 4=Good): <4

Biomass Energy Potential: <2,500,001 mmbtu

GILPIN COUNTY OVERVIEW			
	Gilpin County	Colorado	US
People			
Population, 2001 estimate	4,823	4,417,714	284.8 M
Population percent change, April 1, 2000-July 1, 2001	1.4%	2.7%	1.2%
Population, percent change, 1990 to 2000	55.0%	30.6%	13.1%
Persons under 18 years old, percent, 2000	21.1%	25.6%	25.7%
Persons 65 years old and over, percent, 2000	5.7%	9.7%	12.4%
White persons, percent, 2000	94.4%	82.8%	75.1%
Persons of Hispanic or Latino origin, percent, 2000*	4.2%	17.1%	12.5%
Black or African American persons, percent, 2000	0.5%	3.8%	12.3%
American Indian and Alaska Native persons, percent, 2000	0.8%	1.0%	0.9%
Asian persons, percent, 2000	0.7%	2.2%	3.6%
Persons reporting some other race, percent, 2000	1.5%	7.2%	5.5%
High school graduates, percent of persons age 25+, 2000	94.1%	86.9%	80.4%
Bachelor's degree or higher, pct of persons age 25+, 2000	31.2%	32.7%	24.4%
Mean travel time to work, workers age 16+ (minutes), 2000	34.7	24.3	25.5
Homeownership rate, 2000	78.4%	67.3%	66.2%
Median value of owner-occupied housing units, 2000	\$180,600	\$166,600	\$119,600
Median household money income, 1999	\$51,942	\$47,203	\$41,994
Per capita money income, 1999	\$26,148	\$24,049	\$21,587
Persons below poverty, percent, 1999	4.0%	9.3%	12.4%
Business			
Federal funds and grants, 2001 (\$1,000)	6,825	24,344,658	1.8 B
Geography			
Land area, 2000 (square miles)	150	103,718	3.5 M
Persons per square mile, 2000	31.7	41.5	79.6
Note: *Hispanics may be of any race, so also are included in applicable race categories.			

ESTABLISHMENTS BY SIZE CLASS		
Size Class	Number	Percent
1-4 Employees	42	51.9%
5-9 Employees	11	13.6%
10-19 Employees	10	12.3%
20-49 Employees	6	7.4%
50-99 Employees	5	6.2%
100-249 Employees	2	2.5%
250-499 Employees	3	3.7%
500-999 Employees	2	2.5%
1,000+ Employees	0	0.0%
Total	81	100.1%

HOUSEHOLDS BY INCOME LEVELS		
Income Bracket	Number	Percent
<\$10,000	76	3.7%
\$10,000 to \$19,999	193	9.4%
\$20,000 to \$29,999	191	9.3%
\$30,000 to \$39,999	258	12.5%
\$40,000 to \$49,999	260	12.6%
\$50,000 to \$59,999	275	13.4%
\$60,000 to \$74,999	246	12.0%
\$75,000 to \$99,999	301	14.6%
\$100,000 to \$124,999	135	6.6%
\$125,000 to \$149,999	46	2.2%
\$150,000 to \$199,000	59	2.9%
\$200,000+	17	0.8%
Total	2,057	100.0%

OCCUPATIONS BY TYPE		
Occupation type	Number	Percent
Management, Professional, and Related	1,076	35.0%
Service	585	19.0%
Sales and Office	700	22.7%
Farming, Fishing, and Forestry	5	0.2%
Construction, Extraction, and Maintenance	460	14.9%
Production, Trans., and Material Moving	251	8.2%

WORKERS BY CLASS		
Worker Class	Number	Percent
Private	2,276	74.0%
Government	437	14.2%
Self Employed Non-Inc.	353	11.5%
Unpaid Family	11	0.4%

Source: U.S. Census Bureau - County Quickfacts, 2001 County Business Patterns, and 2000 Census Summary File 3.

COUNTY ASSETS

	Gilpin	Adams	Arapahoe	Boulder	Broomfield	Clear Creek	Denver	Douglas	Jefferson
Commercial Airport							X		
General Aviation Airport			X	X					
Reliever Airport		X	X						X
Interstate Highway		X	X		X	X	X	X	X
State Prison		X							X
Federal Facility				X			X		X
Military Facility		X	X						
Two-year College/University		X	X	X			X	X	X
Four-year College/University		X	X	X			X		X
Private College/University		X	X	X	X		X	X	X
>25% of Pop. with Bachelor Degree	X		X	X	X	X	X	X	X
>10,000 employees		X	X	X	X		X	X	X
Companies w/ 500+ employees	X	X	X	X	X		X	X	X
Manufacturing Shipments (1997)		X	X	X	NA		X	X	X
Ski Resorts				X		X			
Casinos/Gaming	X	X	X						
National Parks/Sites				X					
Oil, Gas, CO ₂ Production		X	X	X			X		
Coal Production									
Wind Energy									
Biomass Energy Potential									

Gilpin County Highlights

Population

- Population is sparse, with just under 5,000 people. Most of its residents live in rural areas. Population growth over the past decade (1990-2000) was 55%, which is well above the state and national average. The growth rate from 2000-2001 was commensurate with the national average at 1.4%.

Income and Housing

- The poverty rate in Gilpin County is below both the state and national averages. The median household income is slightly above the state and national averages.
- Average housing costs in Gilpin County are roughly \$14,000 higher than the state average.

Occupation, Class of Work, Establishment Size

- Gilpin County's casinos and tourism account for the majority of its employment (about 5,000 people) and its production (about \$272M).

Transportation Infrastructure

- There are no commercial service, general aviation, or reliever airports in Gilpin County. There are also no interstate highways that travel through Gilpin County.

State, Federal, or Military Facilities

- There are no state prisons, federal facilities, or military bases in Gilpin County.

Education

- There are no higher education facilities in Gilpin, however, opportunities are available in the surrounding counties.

Attractions

- Gilpin County's main attractions are the 5 casinos located in its county seat of Central City and over 20 casinos located in Black Hawk and the Peak to Peak Scenic Byway.

Natural Resources

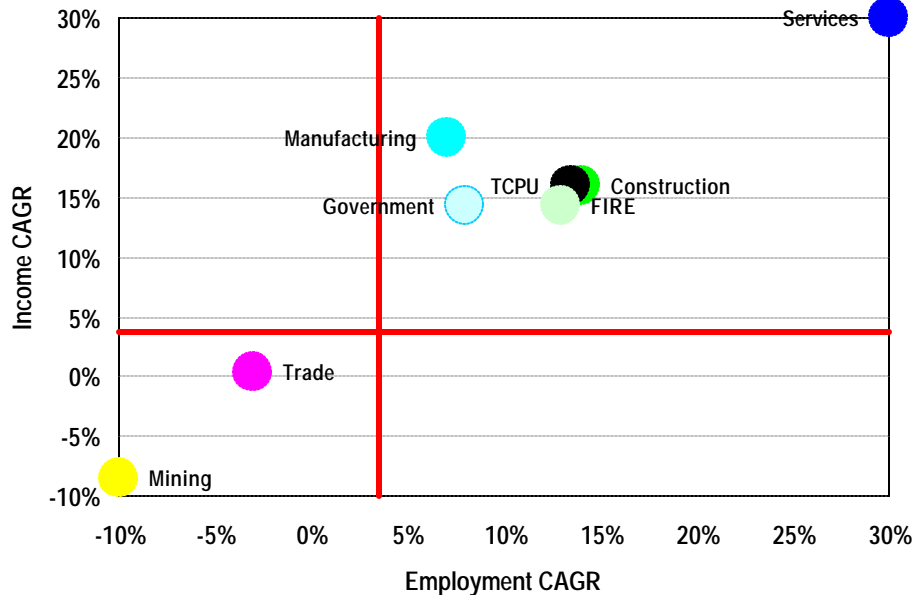
- No fossil fuel production takes place, however there are several small mines operating in the county.

HISTORICAL ANALYSIS OF EMPLOYMENT AND INCOME GILPIN COUNTY													
Employment and Income (2001)					CAGR 1991 to 2001				Location Quotient (2001)				
Employment			Income		Employment		Income		Employment		Income		
		Share		Share									
Services	5,158	88.3%	Services	\$168,061	86.8%	Services	30.5%	Services	35.8%	Services	2.77	Services	2.86
Gov.	343	5.9	Gov.	13,290	6.9	Con.	14.0	Mfg.	20.0	Gov.	0.41	Gov.	0.46
Con.	133	2.3	Con.	6,178	3.2	TCPU	13.9	Con.	16.0	Con.	0.28	Con.	0.38
Trade	129	2.2	Trade	2,857	1.5	FIRE	12.9	TCPU	16.0	Trade	0.10	OGM	0.12
TCPU	30	0.5	TCPU	1,330	0.7	Gov.	7.9	FIRE	14.8	TCPU	0.09	Trade	0.10
FIRE	28	0.5	Mfg.	858	0.4	Mfg.	7.2	Gov.	14.3	FIRE	0.06	TCPU	0.07
Mfg.	20	0.3	FIRE	669	0.3	Trade	-2.7	Ag.	5.3	Mfg.	0.05	Mfg.	0.05
OGM	0	0.0	OGM	391	0.2	OGM	-100.0	Trade	0.4	Ag.	0.00	FIRE	0.04
Ag.	0	0.0	Ag.	20	0.0	Ag.		OGM	-8.5	OGM	0.00	Ag.	0.01

Source: DOLA – Colorado Employment by Sector.

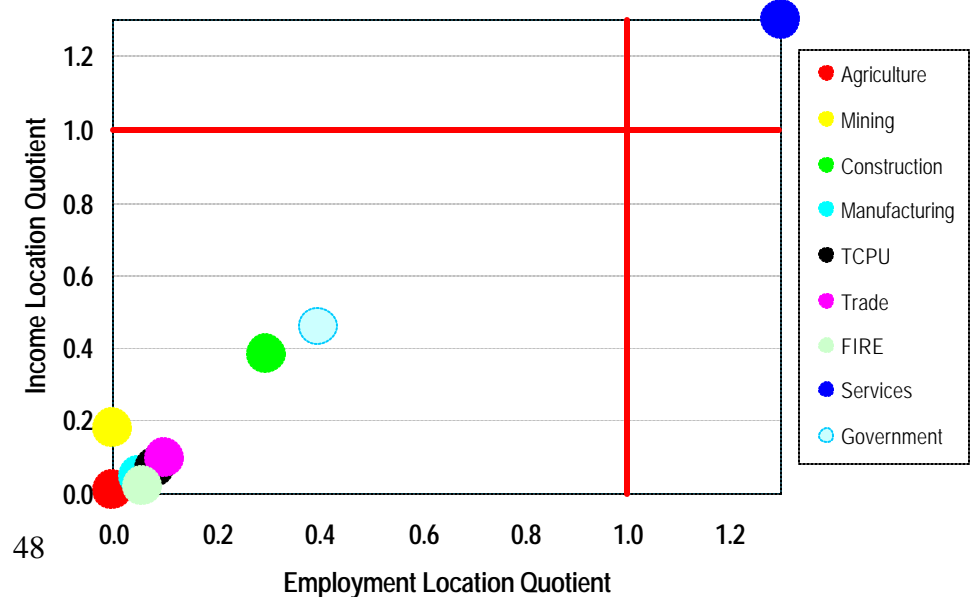
Gilpin County Industry Growth 1991-2001

The chart below illustrates growth of the nine major industry sectors from 1991-2001. Compound annual growth rates (CAGR) are used. From 1991-2001 total state employment grew at a CAGR of 3.6%, and the Denver/Boulder CPI grew at a CAGR of 3.5%. The chart is divided into quadrants based on these values. The upper right-hand quadrant includes industries in the county that had employment growth greater than the state average and income growth greater than the CPI.



Gilpin County Industry Concentration 2001

The chart below illustrates concentration of the nine major industry sectors in 2001. Location quotients (LQ) are used to measure the concentration of an industry in the county relative to the state. An LQ greater than 1 means the county has a high concentration in that industry. The chart is divided into quadrants. The upper right-hand quadrant includes industries with high employment concentration and income concentration.



GILPIN COUNTY SECTOR BREAKDOWN				
Sector	Number of Workers	Total Production (M)	% of Production Exported	Value of Exports (M)
Top 10 Sectors by Employment				
Amusement and Recreation Services	5,107	\$272.3	100%	\$272.3
Federal Government - Non-Defense	286	0.2	0	0.0
Hotels and Lodging Places	284	23.7	92	21.8
State & Local Government - Non-Education	242	12.4	0	0.0
Miscellaneous Retail	98	2.5	0	0.0
Natural Gas & Crude Petroleum	98	28.7	82	23.5
State & Local Government - Education	79	2.9	0	0.0
Eating & Drinking	59	2.7	0	0.0
New Residential Structures	58	9.4	0	0.0
Maintenance and Repair, Other Facilities	51	3.5	0	0.0
Top Sectors by Production				
Amusement and Recreation Services	5,107	\$272.3	100%	\$272.3
Natural Gas & Crude Petroleum	98	28.7	82	23.5
Hotels and Lodging Places	284	23.7	92	21.8
State & Local Government - Non-Education	242	12.4	0	0.0
New Residential Structures	58	9.4	0	0.0
New Industrial and Commercial Buildings	38	4.8	0	0.0
Natural Gas Liquids	2	3.7	81	3.0
Maintenance and Repair, Other Facilities	51	3.5	0	0.0
Top Primary Sectors				
Amusement and Recreation Services	5,107	\$272.3	100%	\$272.3
Natural Gas & Crude Petroleum	98	28.7	82	23.5
Hotels and Lodging Places	284	23.7	92	21.8
Natural Gas Liquids	2	3.7	81	3.0
Miscellaneous Plastics Products	7	1.2	100	1.2
Insurance Agents and Brokers	14	0.8	100	0.8
Construction Machinery and Equipment	2	0.4	100	0.4
Typesetting	3	0.3	100	0.3
Sand and Gravel	3	0.3	100	0.3
Commercial Printing	3	0.2	100	0.2

Source: Minnesota IMPLAN Group, Inc. (2000)

Industry Summary

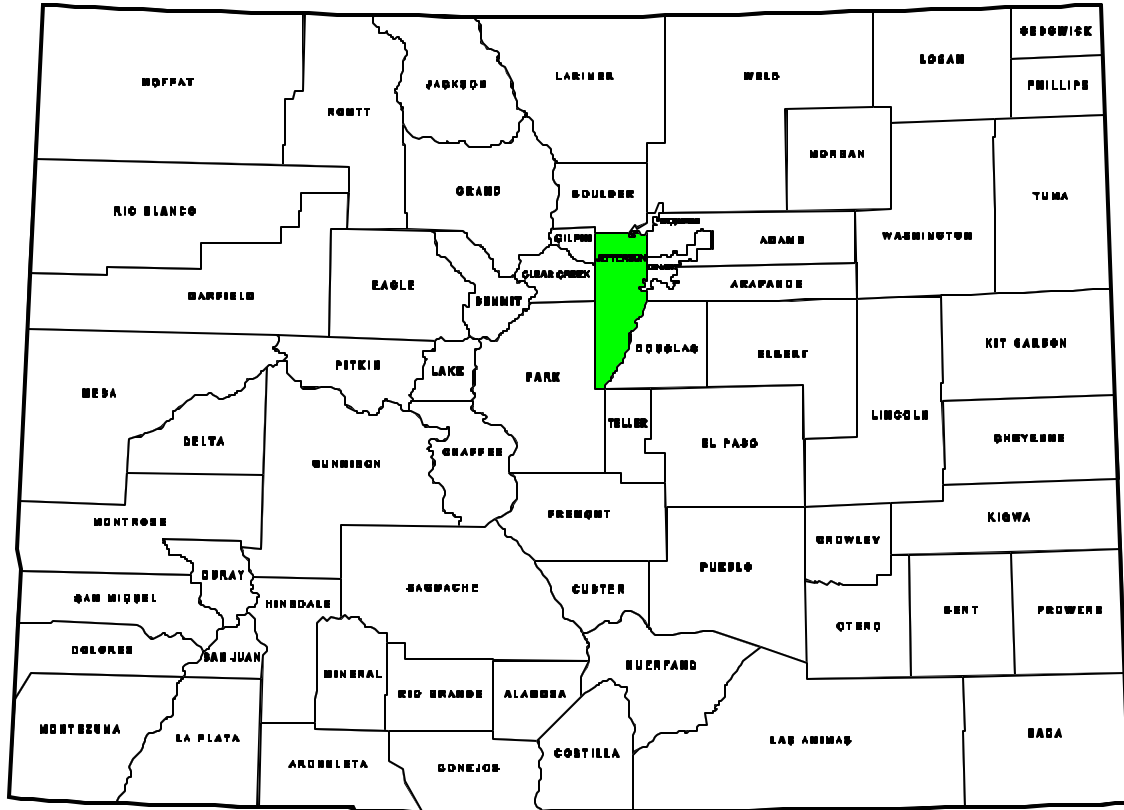
- Gilpin County is a rural community located in the Rocky Mountains adjacent to the Continental Divide. It is best known for the casinos located in its county seat of Central City and in Black Hawk. Tourism accounts for most of Gilpin's employment and production.
- Gilpin County's top sector for employment is amusement and recreation services. This sector employs over 5,000 people, which exceeds the population of the county. Amusement and recreation services are also the top sector for production bringing in \$272 million annually. This is more than all other sectors combined.
- Aside from the tourism industry, construction activity is strong, creating new residential, industrial, and commercial structures.

GILPIN COUNTY - CURRENT, TARGET, AND EMERGING GROWTH INDUSTRIES*

	Current	Target	Growth	Comments
Agriculture				Gilpin is a small rural mountain county located just west of the Denver metropolitan area. Many in the highly educated population commute to jobs in Boulder, Golden, and other metro communities, or work as "lone eagles" in small entrepreneurial home-based ventures.
Animals				
Crops				
Dairy				There is no reported agriculture industry in Gilpin County.
Manufacturing				Made famous by its rich history in gold and silver mining, the industry is now a mere shadow of its former self. However, there are still some small mines operating in the county.
General				
Computer Hardware/Storage				
Photonics				Cluster industries such as biotechnology, software, aerospace, defense, and nanotechnology have a minimal presence in Gilpin County, and it is unlikely that their presence will increase significantly in the near term. However, these industries are concentrated in nearby Boulder and metro area counties, providing commuter jobs for Gilpin County's highly educated workforce.
Energy and Environmental				
Minerals, Gas/Petroleum	X			
Renewable Energy				Today, Gilpin County relies on the strength of its tourism industry. The DOLA base industry study indicated that all of the counties basic jobs are related to tourism. One of two counties in the state that offers gambling, there are more than 20 casinos located here. These casinos provide virtually all of the county's employment, and attract thousands of visitors daily. In addition to the casinos, much of the county is state and national forest land that provides plenty of opportunities for outdoor recreation.
Environmental Industries				
Transportation				
Air				Three film projects were done in the county during 2002. Filming is expected to increase in the future due to the strong gaming industry.
Trucking				
Rail				
General				
Aerospace/Space				
Defense/Homeland Security				
Telecommunications				
Biotechnology				
Nanotechnology				
Services				
Call Centers				
Financial				
Healthcare				
Research and Development				
Software				
Tourism	X	X	X	
Film	X	X	X	

*Note: Definition of current target and emerging growth industry included in introduction to this section.

JEFFERSON COUNTY



JEFFERSON COUNTY RESOURCES

Transportation

Commercial Service Airports: none
 General Aviation Airports: none
 Reliever Airports: Jefferson County Airport
 Interstate Highway Miles: 25.03

Military Bases, Federal Facilities, and Prisons

Military Base: none
 Federal Facilities: National Renewable Energy Laboratory, Rocky Flats Environmental Technology Site, federal corrections institutions, Denver Federal Center
 State Prisons: Colorado Correctional Center

Higher Education (Main Campus)

Four Year: Colorado School of Mines
 Two Year: Red Rocks Community College
 Private Acc.: Colorado Christian University, Rocky Mountain College of Art and Design

Ski Areas, Casinos, and National Parks

Ski Areas: none
 Casinos/Gaming: none
 National Parks/Sites: none

Natural Resources

Oil Production (Barrels of Oil): 0
 Gas Production (Million Cubic Feet): 0
 Coal Production (Short Tons): 0
 CO2 Production (Million Cubic Feet): 0
 Wind Level Rating (5=Outstanding, 4=Good): <4
 Biomass Energy Potential: <2,500,001 mmbtu

JEFFERSON COUNTY OVERVIEW			
	Jefferson County	Colorado	US
People			
Population, 2001 estimate	530,966	4,417,714	284.8 M
Population percent change, April 1, 2000-July 1, 2001	0.7%	2.7%	1.2%
Population, percent change, 1990 to 2000	20.2%	30.6%	13.1%
Persons under 18 years old, percent, 2000	25.3%	25.6%	25.7%
Persons 65 years old and over, percent, 2000	9.6%	9.7%	12.4%
White persons, percent, 2000	90.6%	82.8%	75.1%
Persons of Hispanic or Latino origin, percent, 2000*	10.0%	17.1%	12.5%
Black or African American persons, percent, 2000	0.9%	3.8%	12.3%
American Indian and Alaska Native persons, percent, 2000	0.8%	1.0%	0.9%
Asian persons, percent, 2000	2.3%	2.2%	3.6%
Persons reporting some other race, percent, 2000	3.2%	7.2%	5.5%
High school graduates, percent of persons age 25+, 2000	91.8%	86.9%	80.4%
Bachelor's degree or higher, pct of persons age 25+, 2000	36.5%	32.7%	24.4%
Mean travel time to work, workers age 16+ (minutes), 2000	27.4	24.3	25.5
Homeownership rate, 2000	72.5%	67.3%	66.2%
Median value of owner-occupied housing units, 2000	\$187,900	\$166,600	\$119,600
Median household money income, 1999	\$57,339	\$47,203	\$41,994
Per capita money income, 1999	\$28,066	\$24,049	\$21,587
Persons below poverty, percent, 1999	5.2%	9.3%	12.4%
Business			
Federal funds and grants, 2001 (\$1,000)	2,790,014	24,344,658	1.8 B
Geography			
Land area, 2000 (square miles)	772	103,718	3.5 M
Persons per square mile, 2000	682.6	41.5	79.6
Note: *Hispanics may be of any race, so also are included in applicable race categories.			

ESTABLISHMENTS BY SIZE CLASS		
Size Class	Number	Percent
1-4 Employees	10,066	62.1%
5-9 Employees	2,626	16.2%
10-19 Employees	1,710	10.6%
20-49 Employees	1,145	7.1%
50-99 Employees	386	2.4%
100-249 Employees	217	1.3%
250-499 Employees	40	0.2%
500-999 Employees	7	0.0%
1,000+ Employees	5	0.0%
Total	16,202	99.9%

HOUSEHOLDS BY INCOME LEVELS		
Income Bracket	Number	Percent
<\$10,000	8,121	3.9%
\$10,000 to \$19,999	14,215	6.9%
\$20,000 to \$29,999	19,298	9.4%
\$30,000 to \$39,999	22,655	11.0%
\$40,000 to \$49,999	22,228	10.8%
\$50,000 to \$59,999	21,175	10.3%
\$60,000 to \$74,999	27,523	13.3%
\$75,000 to \$99,999	31,699	15.4%
\$100,000 to \$124,999	17,457	8.5%
\$125,000 to \$149,999	8,438	4.1%
\$150,000 to \$199,000	7,387	3.6%
\$200,000+	6,060	2.9%
Total	206,256	100.1%

OCCUPATIONS BY TYPE		
Occupation type	Number	Percent
Management, Professional, and Related	120,145	41.3%
Service	33,581	11.5%
Sales and Office	83,837	28.8%
Farming, Fishing, and Forestry	301	0.1%
Construction, Extraction, and Maintenance	27,807	9.6%
Production, Trans., and Material Moving	25,291	8.7%

WORKERS BY CLASS		
Worker Class	Number	Percent
Private	230,629	79.3%
Government	39,934	13.7%
Self Employed Non-Inc.	19,851	6.8%
Unpaid Family	541	0.2%

Source: U.S. Census Bureau - County Quickfacts, 2001 County Business Patterns, and 2000 Census Summary File 3.

COUNTY ASSETS

	Jefferson	Adams	Arapahoe	Boulder	Broomfield	Clear Creek	Denver	Douglas	Gilpin
Commercial Airport							X		
General Aviation Airport			X	X					
Reliever Airport	X	X	X						
Interstate Highway	X	X	X		X	X	X	X	
State Prison	X	X							
Federal Facility	X			X			X		
Military Facility		X	X						
Two-year College/University	X	X	X	X			X	X	
Four-year College/University	X	X	X	X			X		
Private College/University	X	X	X	X	X		X	X	
>25% of Pop. with Bachelor Degree	X		X	X	X	X	X	X	X
>10,000 employees	X	X	X	X	X		X	X	
Companies w/ 500+ employees	X	X	X	X	X		X	X	X
Manufacturing Shipments (1997)	X	X	X	X	NA		X	X	
Ski Resorts				X		X			
Casinos		X	X						X
National Parks/Sites				X					
Oil, Gas, CO ₂ Production		X	X	X			X		
Coal Production									
Wind Energy									
Biomass Energy Potential									

Jefferson County Highlights

Population

- Jefferson County's population is commensurate with Denver County's, making it one of the largest counties in Colorado. The population level is stable, with a percent change of only 0.7%, well below the state and national average.

Income and Housing

- Average household income in Jefferson County is \$10,000 above the state and \$16,000 above the national average. The majority of the population has an income level between \$30,000 and \$100,000.

Occupation, Class of Work, Establishment Size

- Jefferson County's eating/ drinking and retail sectors are two of the largest employers. Coors Brewery is also located here bringing in nearly \$2 billion, making it one of the largest sectors of production next to real estate.

Transportation Infrastructure

- I-70 runs through Jefferson County making Denver and DIA easily accessible. Jefferson County Airport, a reliever airport, is also located here. C-470 facilitates high-speed traffic flow around the metro area to the southeast and connects to I-25

State, Federal, or Military Facilities

- Located in Jefferson are the Colorado Correctional Center and federal prisons, Natural Renewable Energy Laboratory, Rocky Flats, and Denver Federal Center. There are no military bases in Jefferson County.

Education

- Jefferson has a wide range of education options, with the Colorado School of Mines, Red Rocks Community College, Colorado Christian University, and Rocky Mountain College of Art and Design located in the county.

Attractions

- There are miles of open space, national forests, museums, amusement parks, and other attractions. Red Rocks Amphitheater is an attractive concert venue and the Lariat Loop is a Scenic Byway.

Natural Resources

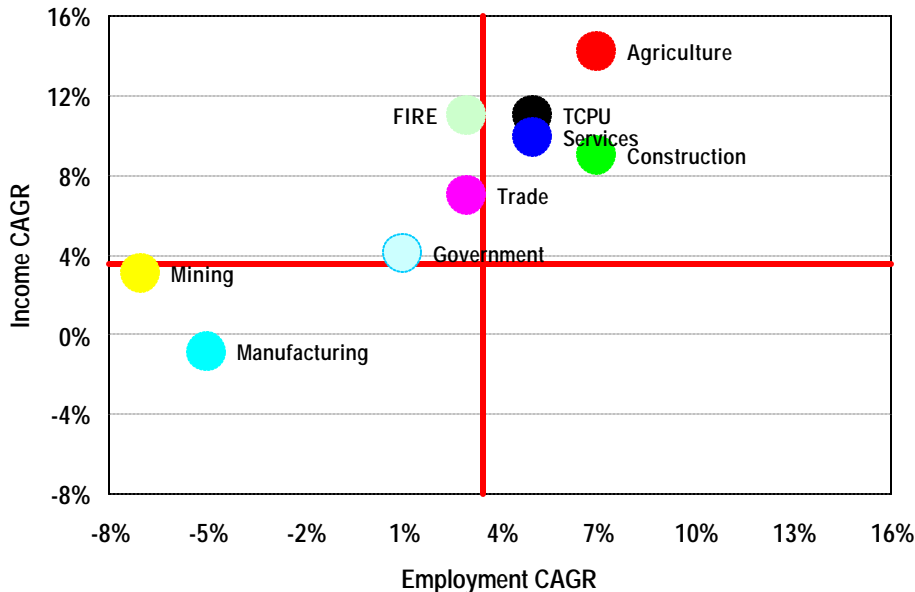
- There are no significant levels of natural resources in Jefferson County.

HISTORICAL ANALYSIS OF EMPLOYMENT AND INCOME JEFFERSON COUNTY													
Employment and Income (2001)						CAGR 1991 to 2001				Location Quotient (2001)			
Employment			Income			Employment		Income		Employment		Income	
		Share			Share								
Services	82,920	32.1%	Services	\$3,173,622	30.5%	Ag.	7.1%	Ag.	14.2%	Mfg.	1.16	Mfg.	1.47
Trade	63,500	24.6	Gov.	1,638,227	15.7	Con.	7.1	FIRE	11.1	Trade	1.14	Con.	1.10
Gov.	34,827	13.5	Trade	1,527,786	14.7	Services	4.9	TCPU	11.0	Con.	1.06	Gov.	1.06
Mfg.	22,483	8.7	Mfg.	1,449,507	13.9	TCPU	4.9	Services	9.9	Services	1.01	Trade	1.02
Con.	22,089	8.5	Con.	970,381	9.3	FIRE	3.1	Con.	9.0	Gov.	0.95	Services	1.01
FIRE	17,268	6.7	FIRE	768,519	7.4	Trade	3.1	Trade	7.0	FIRE	0.89	FIRE	0.79
TCPU	9,737	3.8	TCPU	670,932	6.4	Gov.	1.3	Gov.	4.1	TCPU	0.65	Ag.	0.74
Ag.	4,946	1.9	Ag.	107,179	1.0	Mfg.	-4.9	OGM	3.1	Ag.	0.65	TCPU	0.65
OGM	603	0.2	OGM	98,999	1.0	OGM	-7.0	Mfg.	-0.9	OGM	0.37	OGM	0.56

Source: DOLA – Colorado Employment by Sector.

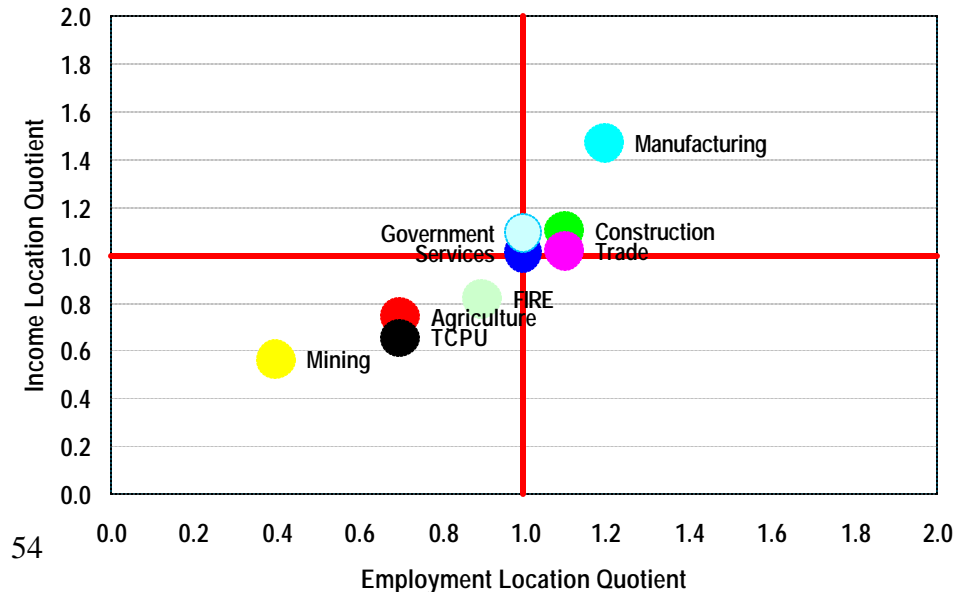
Jefferson County Industry Growth 1991-2001

The chart below illustrates growth of the nine major industry sectors from 1991-2001. Compound annual growth rates (CAGR) are used. From 1991-2001 total state employment grew at a CAGR of 3.6%, and the Denver/Boulder CPI grew at a CAGR of 3.5%. The chart is divided into quadrants based on these values. The upper right-hand quadrant includes industries in the county that had employment growth greater than the state average and income growth greater than the CPI.



Jefferson County Industry Concentration 2001

The chart below illustrates concentration of the nine major industry sectors in 2001. Location quotients (LQ) are used to measure the concentration of an industry in the county relative to the state. An LQ greater than 1 means the county has a high concentration in that industry. The chart is divided into quadrants. The upper right-hand quadrant includes industries with high employment concentration and income concentration.



JEFFERSON COUNTY SECTOR BREAKDOWN				
Sector	Number of Workers	Total Production (M)	% of Production Exported	Value of Exports (M)
Top 10 Sectors by Employment				
Eating & Drinking	20,427	\$823.1	21%	\$172.9
State & Local Government - Education	15,220	599.8	0	0.0
Miscellaneous Retail	13,308	414.3	0	0.0
Federal Government - Non-Defense	12,105	704.4	0	0.0
Real Estate	10,751	2,310.1	60	1,386.1
Computer and Data Processing Services	9,160	905.8	57	516.3
Wholesale Trade	8,523	1,236.0	9	111.2
State & Local Government - Non-Education	7,775	357.7	0	0.0
Credit Agencies	7,740	191.7	42	80.5
Doctors and Dentists	7,440	693.4	0	0.0
Top Sectors by Production				
Real Estate	10,751	2,310.1	60	1,386.1
Malt Beverages	2,875	1,855.2	100	1,855.2
Wholesale Trade	8,523	1,236.0	9	111.2
New Residential Structures	7,354	1,206.9	0	0.0
Sanitary Services and Steam Supply	3,095	1,051.5	85	893.8
Computer and Data Processing Services	9,160	905.8	57	516.3
Complete Guided Missiles	4,363	838.7	100	838.7
Eating & Drinking	20,427	823.1	21	172.9
Top Primary Sectors				
Malt Beverages	2,875	\$1,855.2	100%	\$1,855.2
Sanitary Services and Steam Supply	3,095	1,051.5	85	893.8
Complete Guided Missiles	4,363	838.7	100	838.7
Computer and Data Processing Services	9,160	905.8	57	516.3
Metal Cans	1,291	525.7	75	394.3
Natural Gas & Crude Petroleum	1,243	324.5	64	207.7
Research, Development & Testing Services	3,671	262.3	75	196.7
Motor Vehicle Parts and Accessories	1,164	289.8	65	188.4
Surgical and Medical Instruments	2,016	355.2	50	177.6
Gas Production and Distribution	281	316.7	34	107.7

Source: Minnesota IMPLAN Group, Inc. (2000)

Industry Summary

- Jefferson County is located in central Colorado where the great plains meet the Rocky Mountains. It is 70% mountains. Its flat areas contain a diverse mixture of open space, residential neighborhoods, many small businesses, and large industries.
- Its population makes it one of the largest counties in Colorado.
- The eating/drinking and retail sectors are two of the largest for employers in the county, followed by government and real estate.
- With Coors Brewery in Golden, malt beverages is the top primary sector. Other significant primary industries include guided missile systems, computer and data processing services, and metal can production.
- Jefferson County receives nearly \$3M in federal funds and grants annually.
- There is a high concentration of government jobs.

JEFFERSON COUNTY - CURRENT, TARGET, AND EMERGING GROWTH INDUSTRIES*

	Current	Target	Growth	Comments
Agriculture				Jefferson County produces some hay and cattle with 1997 market value of agricultural products sold \$19,474,000. The area has developed 10 farmers' markets providing specialty crop growers with higher revenues by selling direct to urban consumers.
Animals	X			
Crops	X			
Dairy	X			About 11% of the state's manufacturing employees work in Jefferson County. This sector is driven by the defense and aerospace activities of Lockheed Martin and local suppliers. Other manufacturing exists in beverages, fabricated metal products, computer storage and equipment, nonmetallic mineral product manufacturing and miscellaneous manufacturing.
Manufacturing				
General	X	X		
Computer Hardware/Storage	X			About 4% of photonics companies are in Jefferson County. The strength of this sector is supported by a strong cluster in Boulder.
Photonics	X	X	X	
Energy and Environmental				Jefferson County mines produce uranium. The National Renewable Energy Laboratory and Department of Energy Field Offices are located in this county, providing jobs and economic impact from current research activities. The Colorado School of Mines is partnered with the Colorado Office of Energy Management and Conservation in the Colorado Energy Research Institute to expand research in hydrogen and fuel cell technologies. These activities provide near term economic impact from research funding and future opportunity for the area to generate spin off new technology ventures based on renewable energy technologies. The county has a strong growth base for the environmental and energy industry, with the largest number of companies in the state located here.
Minerals, Gas/Petroleum	X			
Renewable Energy	X	X	X	
Environmental Industries	X	X	X	Development is projected in the 500 acres surrounding Jefferson County Airport. This could positively impact both air and general transportation.
Transportation				
Air	X	X	X	
Trucking				Jefferson County has a strong concentration of the state's biomedical and medical device companies. The area could foster future growth from the convergence of biotechnology and nanotechnology and the leading edge nanotechnology research at the National Renewable Energy Laboratory.
Rail				
General				
Aerospace/Space	X	X	X	Several small companies based on nanotechnology research are already located in the county. NREL, Colorado School of Mines, and Red Rocks Community College research and nanotechnology capabilities also provide the opportunity for development and support of energy and environmental companies utilizing this enabling technology.
Defense/Homeland Security	X	X	X	
Telecommunications				Call centers have a very strong presence in Jefferson County. The area has a high population base to draw from, and call centers provide significant employment. Jefferson is well positioned for possible growth in this industry. The necessary telecom infrastructure is in place and there are several colleges and universities which could provide centers with an inexpensive labor pool.
Biotechnology	X	X	X	
Nanotechnology	X	X	X	
Services				About 8% of the state's finance and insurance employees work in Jefferson County, although their average wages are below the state average.
Call Centers	X	X		
Financial	X			Slightly less than 10% of the state's health-care employees work in Jefferson County.
Healthcare	X			
Research and Development	X	X	X	Software employment in the county has decreased in recent years.
Software	X			Scientific and research jobs in private companies and organizations, the National Renewable Energy Lab, and Colorado School of Mines foster high-technology growth.
Tourism	X	X		A variety of cultural and outdoor recreational activities are offered in the county. A total of eight projects were filmed in the county during 2002.
Film	X	X	X	

*Note: Definition of current target and emerging growth industry included in introduction to this section.