

YOUR EL PASO

MASTER PLAN

Demographic, Market & Housing Profile

The Demographic, Market & Housing Profile for El Paso County provides valuable insight into the County through summaries of technical information related to population trends; an overview of housing conditions; and a broad assessment of the retail, office, and industrial market conditions. A county-wide profile is much different than one for a municipality, such as a city or town, as the geographic area is significantly larger which affects market composition and change. The analyses in this profile report are conducted at a higher level to account for greater changes in the demographic makeup of the population, their spending habits, and development patterns.

The information contained in this document is background data for *Your El Paso Master Plan* – a new plan for El Paso County. The Master Plan needs to be grounded in the local demographic and market realities, and the data is presented to inform the Master Plan in key sections such as Population, Land Use, Economic Development, and in other related plan elements. The report will ultimately serve as the basis for many important plan recommendations. Data sources are noted throughout, and a description of the various sources can be found at the end of the report.



YOUR EL PASO

MASTER PLAN

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1. Demographics

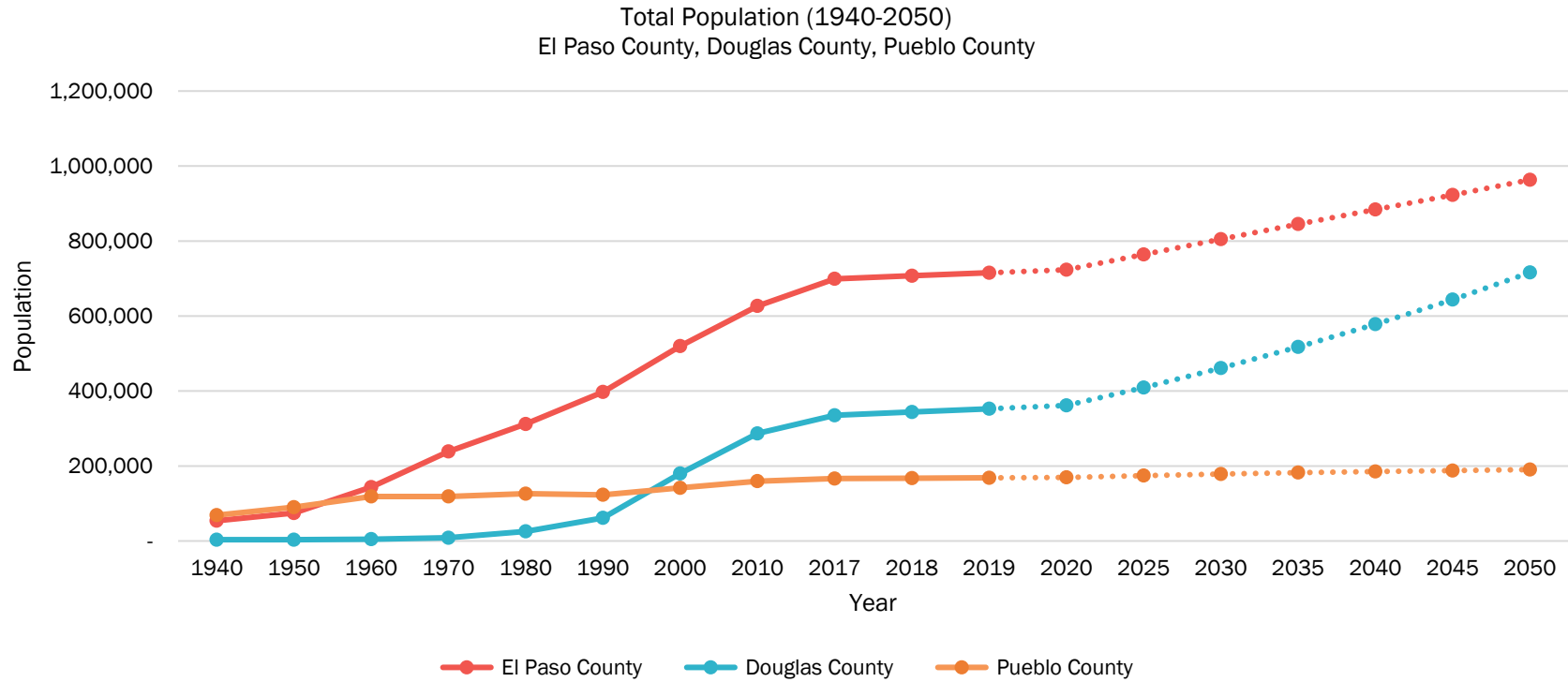
The following section describes the basic demographic characteristics of El Paso County, utilizing the most current, quality data sources. Where appropriate, the County's characteristics are compared to neighboring Douglas and Pueblo Counties as well as the State of Colorado as a whole.

Population

El Paso County is the second largest County in Colorado, second only to Denver County. However, Denver County's total area is seven percent the size of El Paso County's. The two counties account for 24 percent of the State's total population, slightly down from 25 percent in 2010.

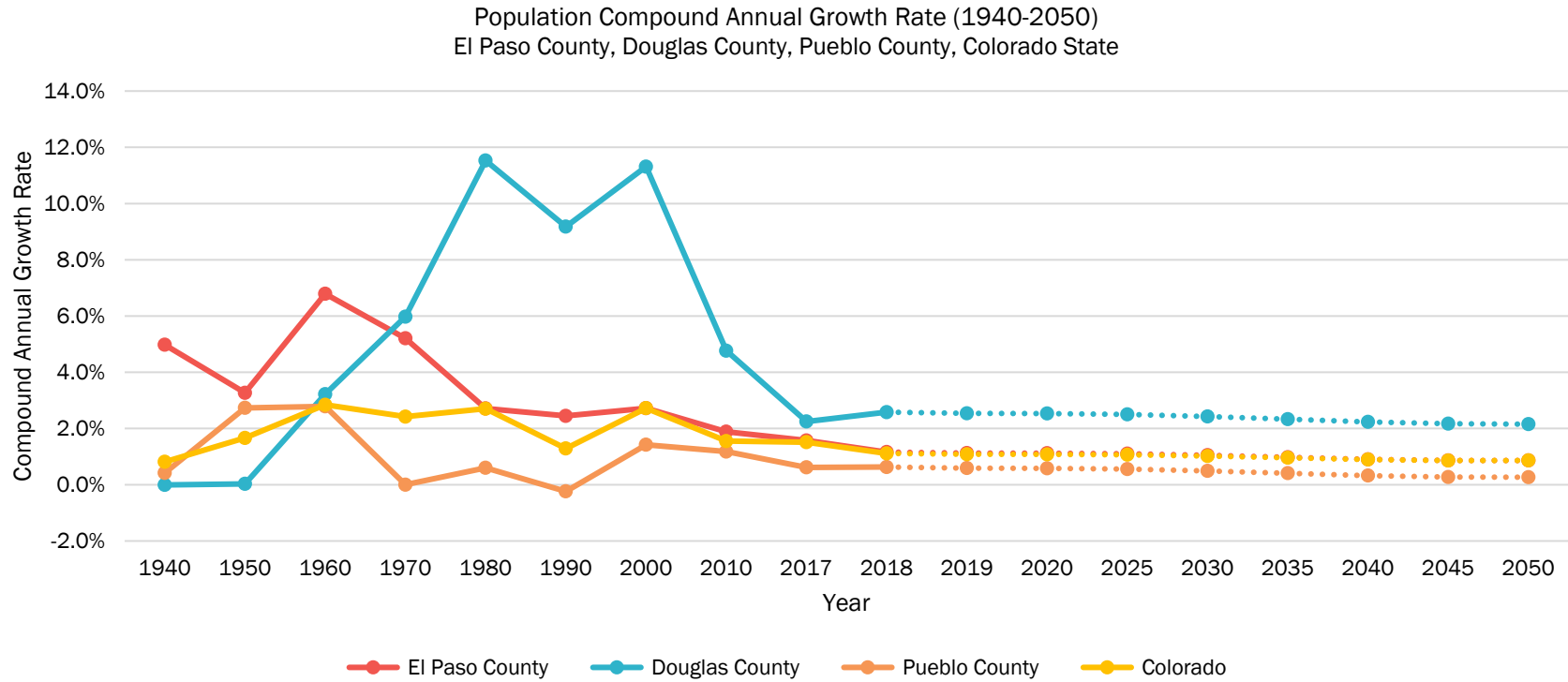
- El Paso County's population has experienced significant growth since 1940, increasing by an average of over 74,200 residents every decade between 1940 and 2010. The County has grown by over 80,000 between 2010 and 2017.
- El Paso County's average population growth by decade is more than double that of Douglas County's.
- El Paso County's compound annual growth rate (CAGR), the annual distribution of change (growth or decline) in a community over a specific time period, has fluctuated each decade but has been consistently above one percent since 1940, which is higher than Colorado. Douglas County however has experienced greater compound annual growth due to a significant influx in population from 1970-2000.
- El Paso County is projected to reach nearly one million people by 2050, an increase of 256,000. The State is projected to gain two million people over the same time period, of which El Paso County's growth will account for 13 percent. While some of the projected growth can be accommodated in Colorado Springs, the largest municipality in the County, many of the new residents will have to be accommodated in unincorporated County areas, which will need to be effectively directed and managed to prevent an overburdening of the County's infrastructure and services systems.

Figure 1-1. Total Population



Source: U.S. Census, Woods & Poole, Houseal Lavigne Associates

Figure 1-2. Population Compound Annual Growth Rate

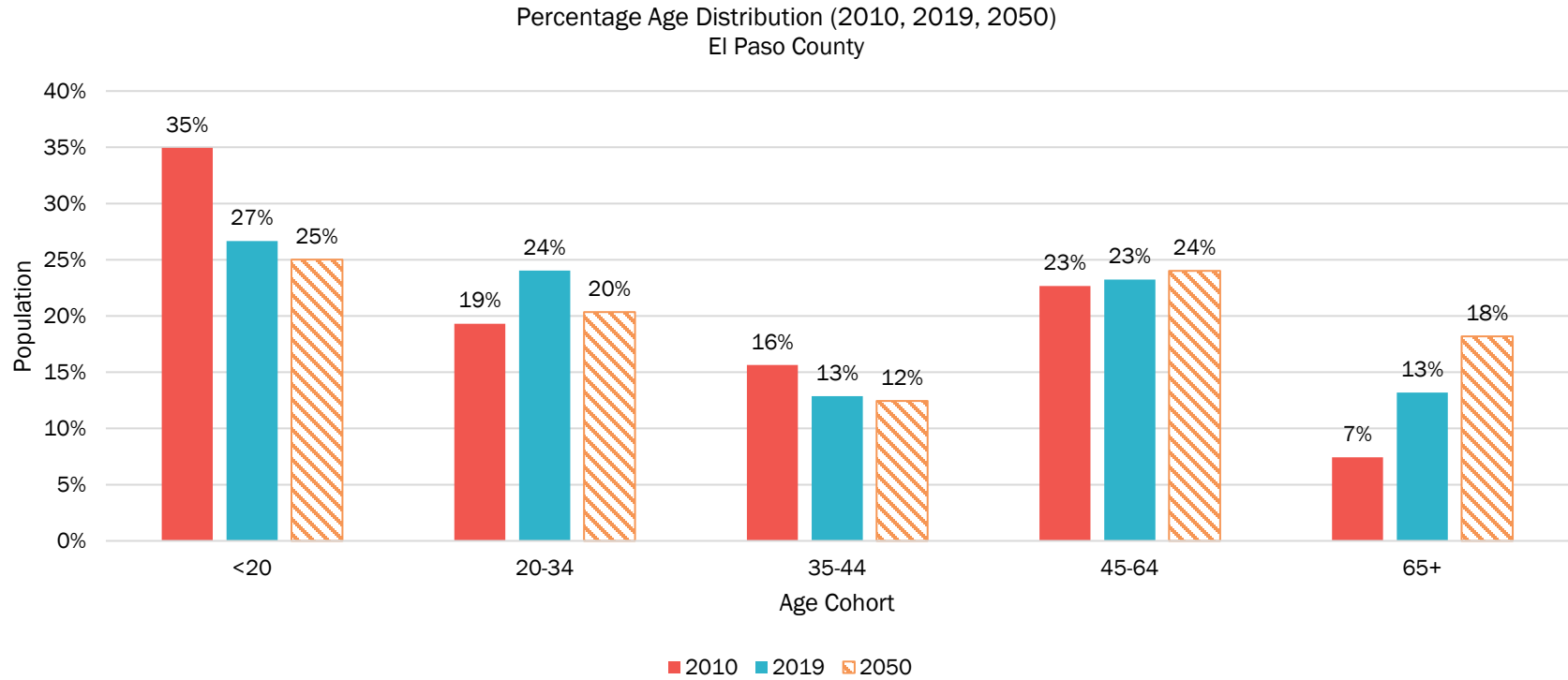


Source: U.S. Census, Woods & Poole, Houseal Lavigne Associates

Age Distribution

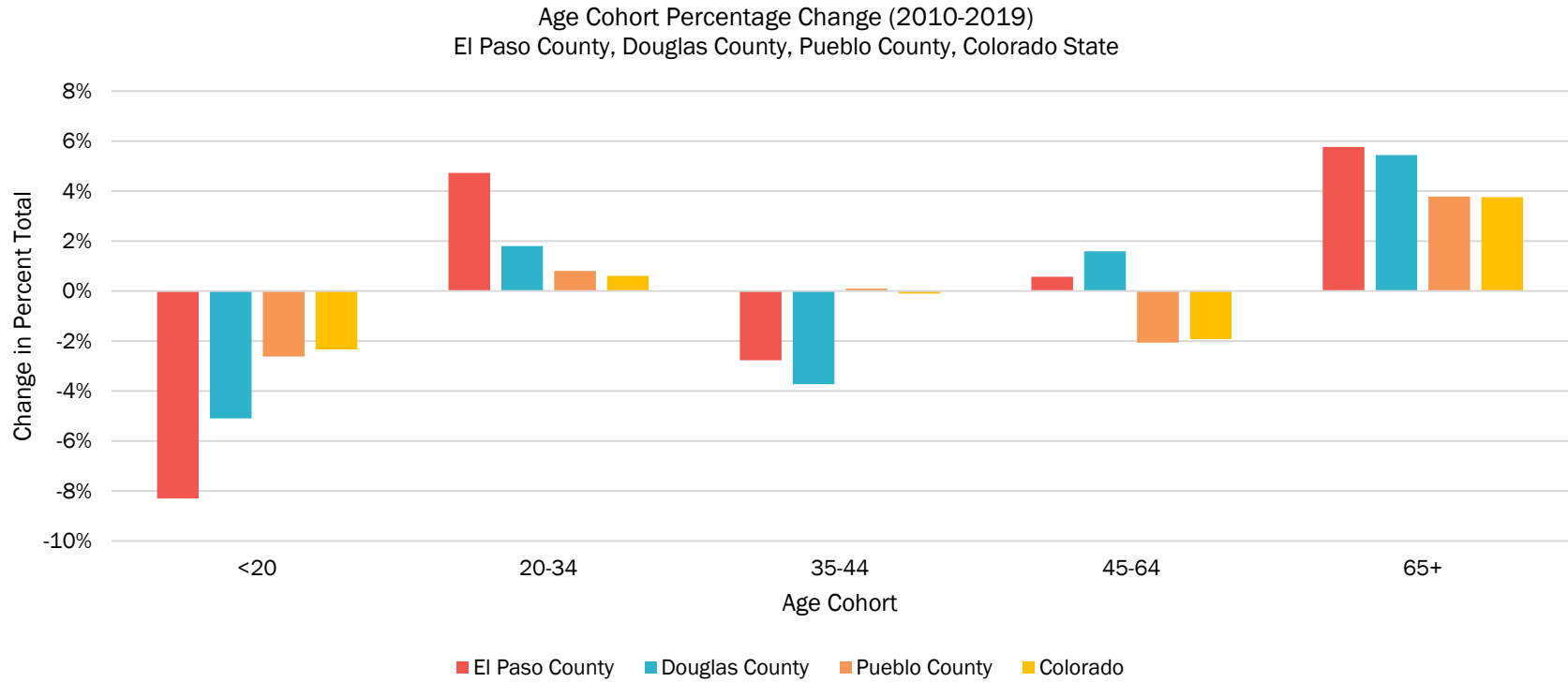
- El Paso County's population has experienced a shift from younger to older overall from 2010-2019, with the under 20 age group declining by eight percent and the 65 and older (senior) group growing by six percent. However, declines in age cohorts does not always translate to a population transitioning from older to younger or vice versa. Trends in the senior age group is projected to continue through 2050 as well, although the under 20 age cohort is, and is projected to remain the largest in the County.
- The 20-34 age group (young professionals) has also grown significantly since 2010,
- El Paso County and the comparison communities experienced the greatest decline in CAGR in the under 20 age group from 2010-2019 and greatest rate of growth in the senior age group. El Paso County had the highest number of net births (41,929) from 2010-2017 but only an annual growth in the under 20 age cohort of .5 percent. Over the same time period the County experienced a net in-migration of 50,830, which is higher than net births,
- Projected through 2050, the senior group is expected to experience the greatest annual growth, which is likely correlated to the continued in-migration of older residents as well as more existing residents aging. Inverse to the last decade, the 20-34 age group in El Paso County is projected to experience the smallest growth.

Figure 1-3. Percentage Age Distribution



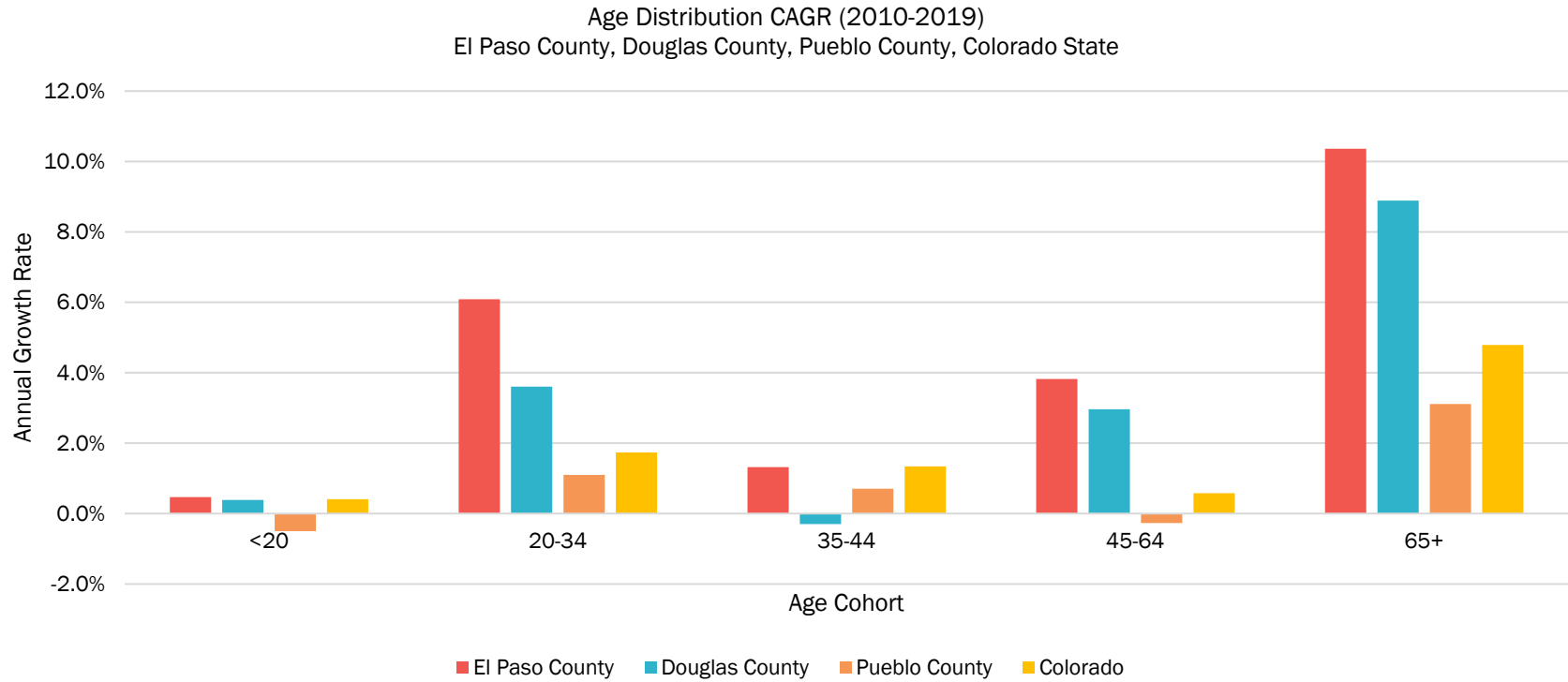
Source: U.S. Census, Woods & Poole, Houseal Lavigne Associates

Figure 1-4. Age Cohort Percentage Change



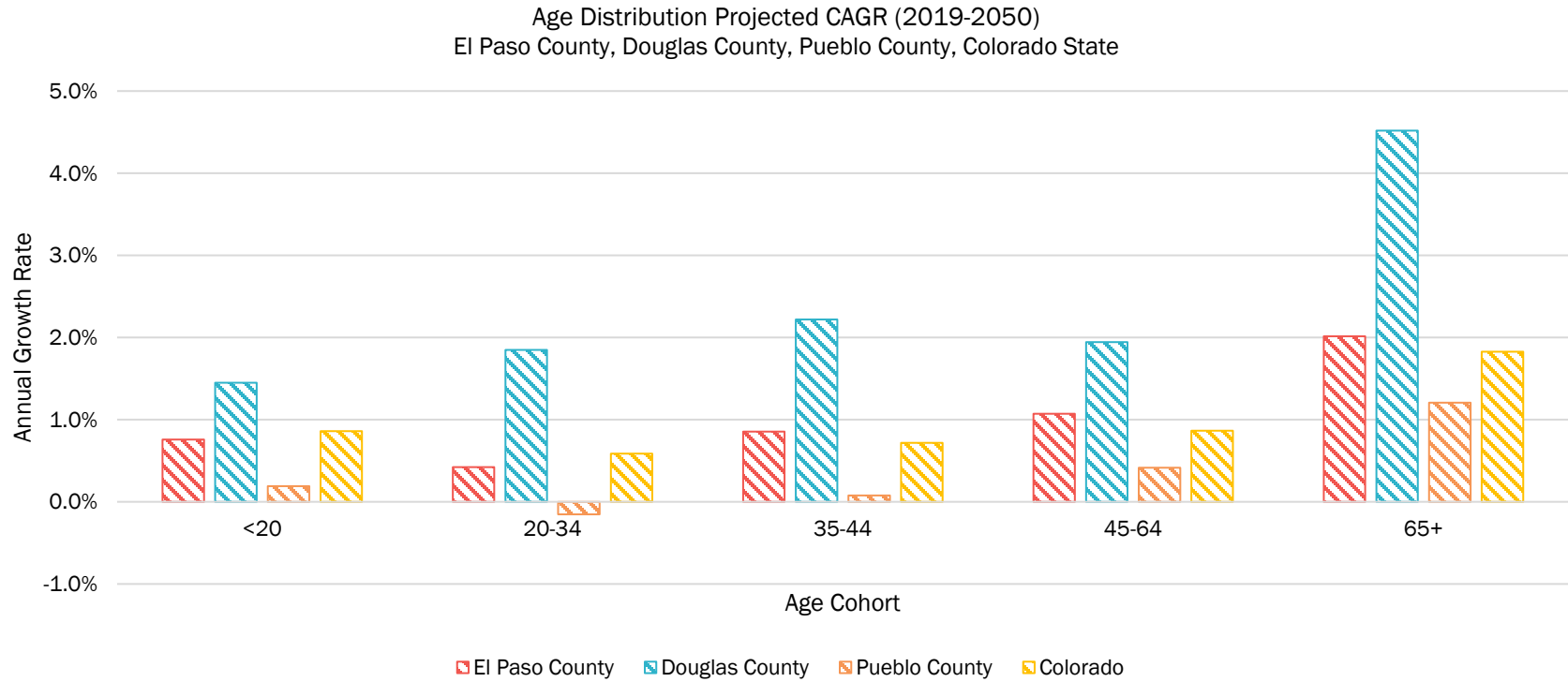
Source: U.S. Census, Woods & Poole, Houseal Lavigne Associates

Figure 1-5. Age Distribution Compound Annual Growth Rate (CAGR)



Source: U.S. Census, Woods & Poole, Houseal Lavigne Associates

Figure 1-6. Age Distribution Projected CAGR

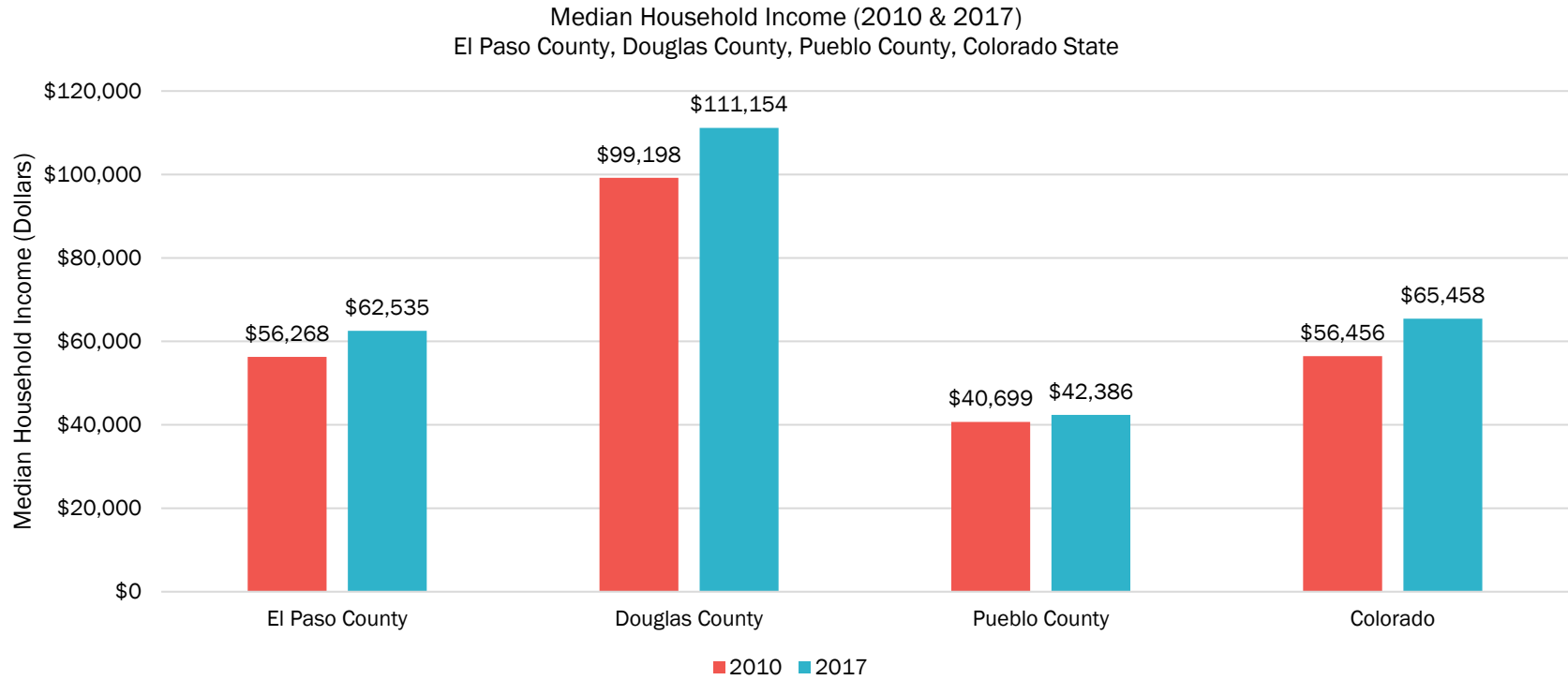


Source: Woods & Poole, Houseal Lavigne Associates

Household Income

- Median household income has grown by 11 percent in El Paso County between 2010 and 2017, exceeding inflation which was 2.3 percent. El Paso County's median income is close to the overall median income for the State but only 56 percent of Douglas County's indicating that households in Douglas earn higher incomes overall.
- Even though Douglas County's median income is significantly higher than El Paso County's, it was the only community to increase its share of low-income households.
- Since 2010, El Paso County has experienced its greatest growth in households with annual incomes greater than \$150,000. This also true for Pueblo County and the State, which suggests a few points: one being that El Paso County is becoming increasingly more attractive to higher-income households and another is that existing households are experiencing increases in their incomes.
- Projections through 2050 indicate that these trends will continue in El Paso County with increases only in households earning incomes greater than \$74,999. Households with higher incomes correlate to greater spending power and increases in retail spending and more importantly a desire for higher-quality goods and services, both public and private.

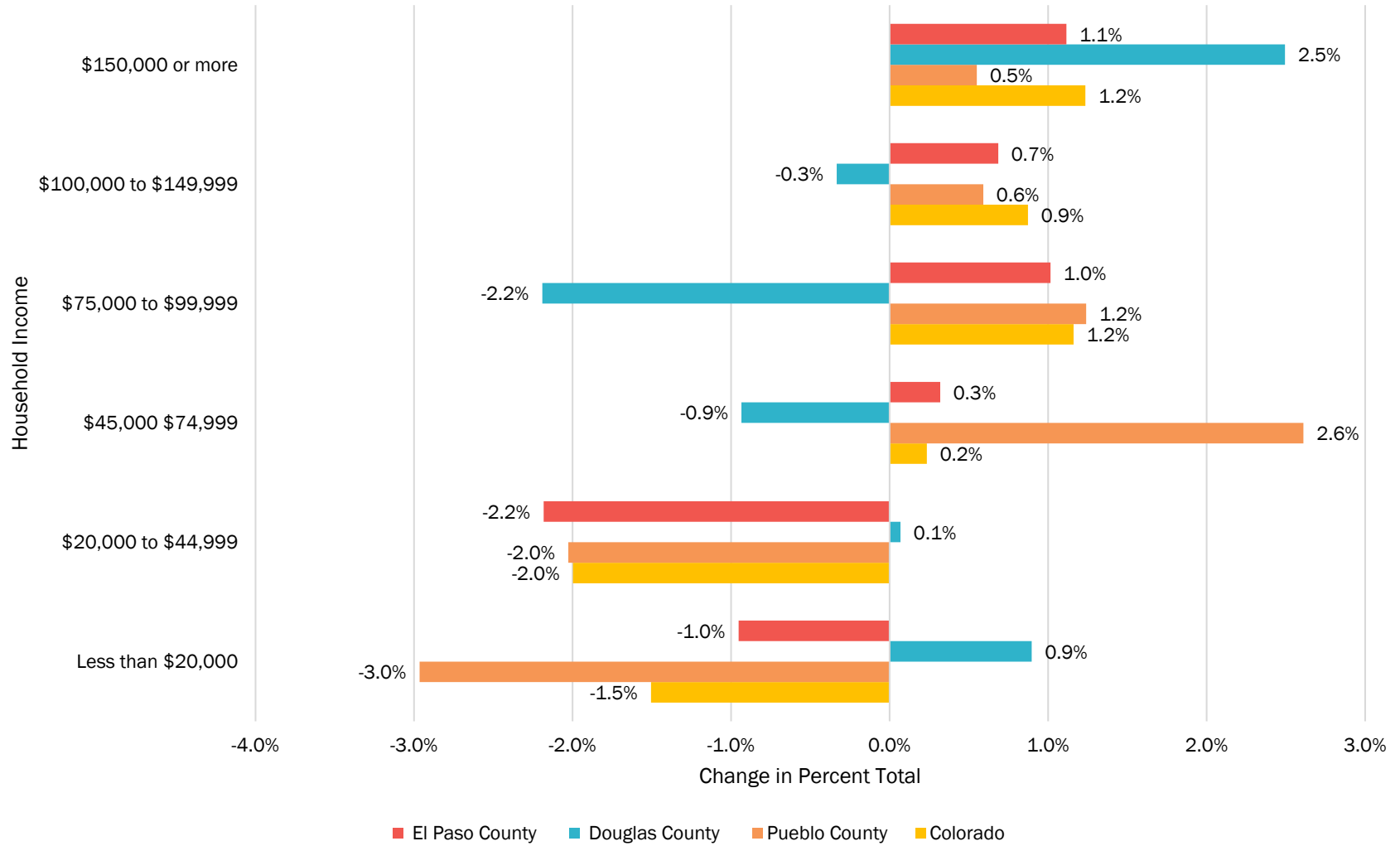
Figure 1-7. Median Household Income



Source: U.S. Census, Woods & Poole, Houseal Lavigne Associates

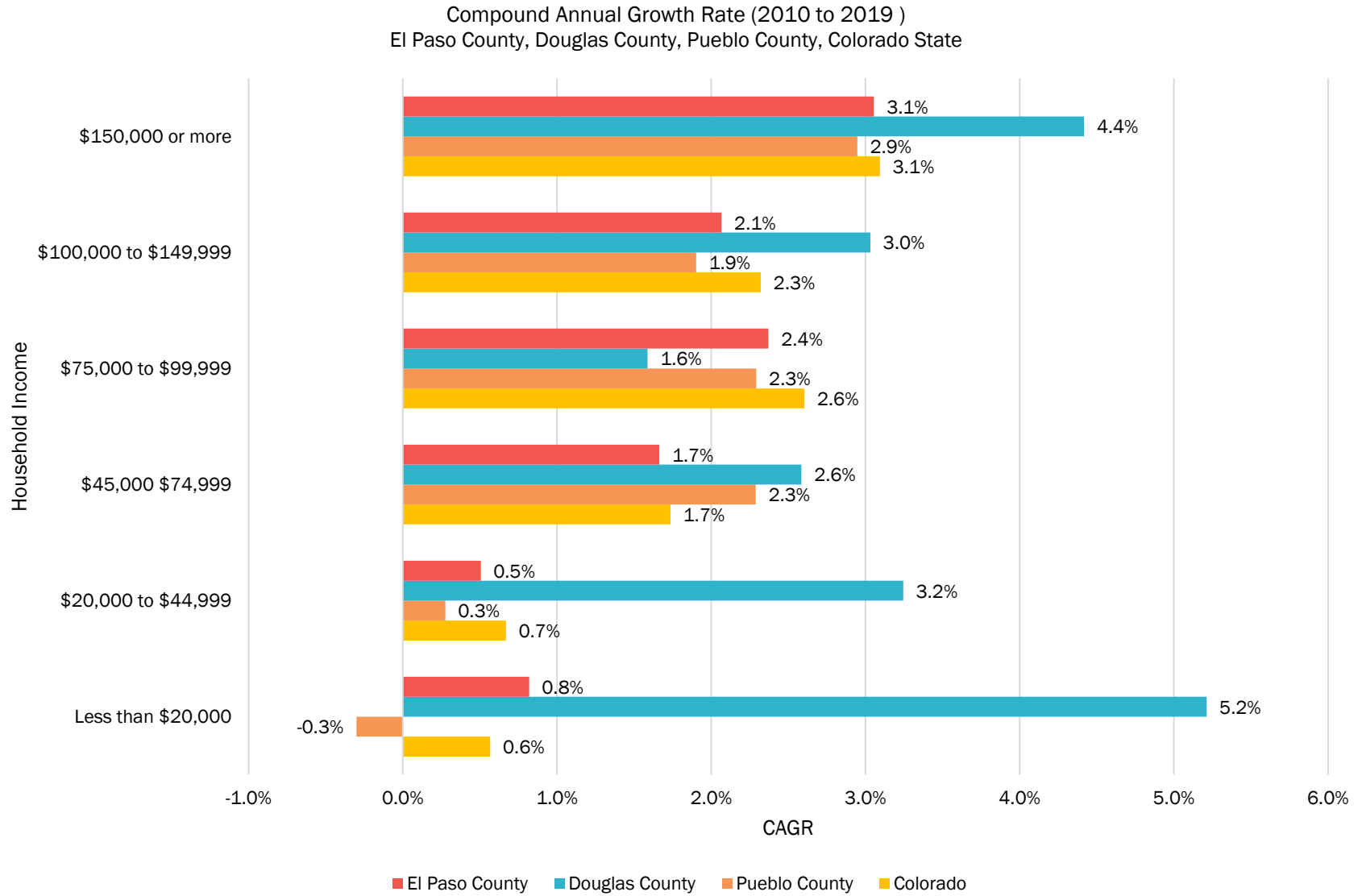
Figure 1-8. Change in Income Distribution

Household Income Percentage Change (2010 to 2019)
 El Paso County, Douglas County, Pueblo County, Colorado State



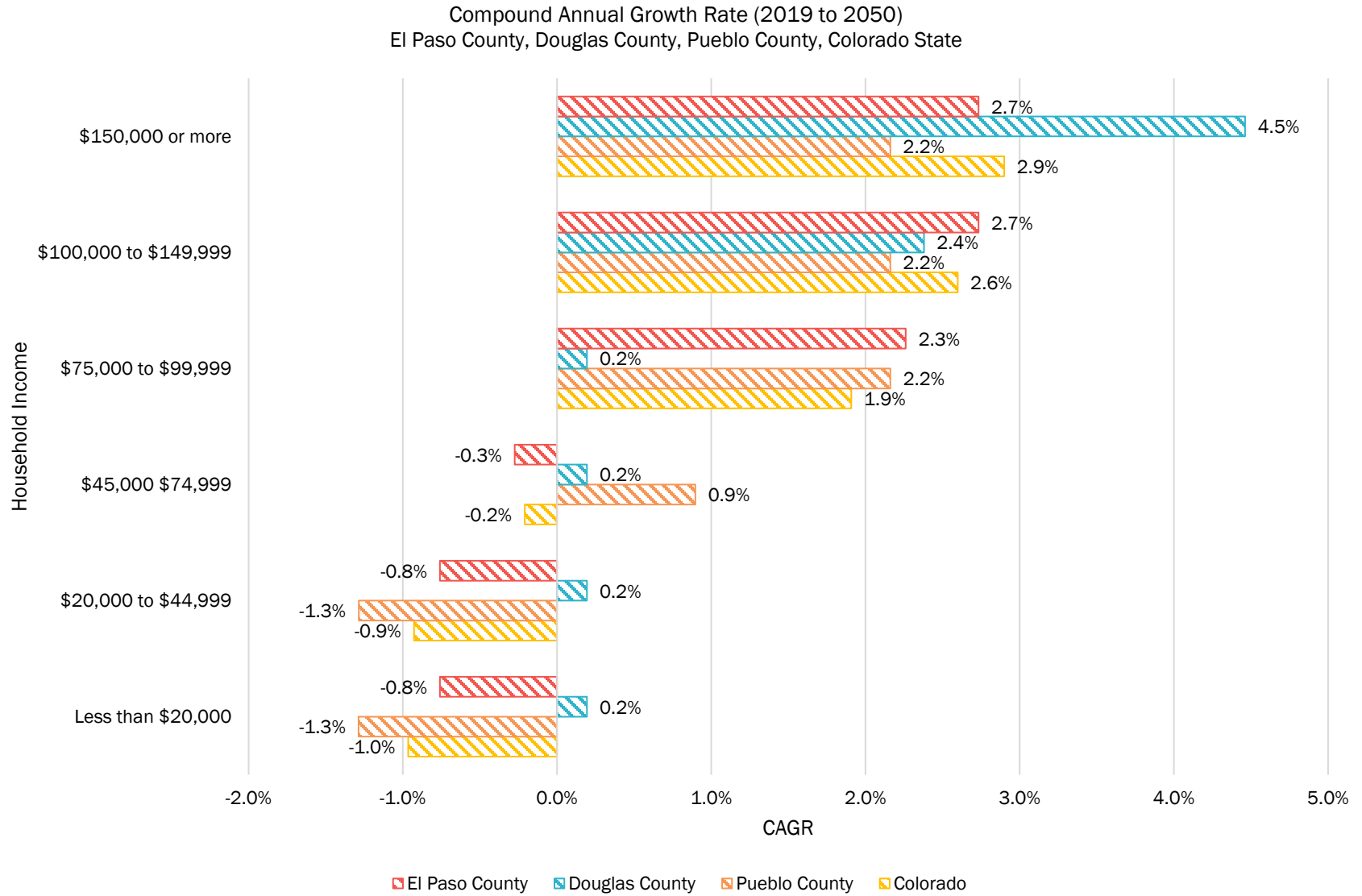
Source: U.S. Census, Woods & Poole, Houseal Lavigne Associates

Figure 1-9. Income Distribution Compound Annual Growth Rate



Source: U.S. Census, Woods & Poole, Houseal Lavigne Associates

Figure 1-10. Income Distribution Projected Compound Annual Growth Rate

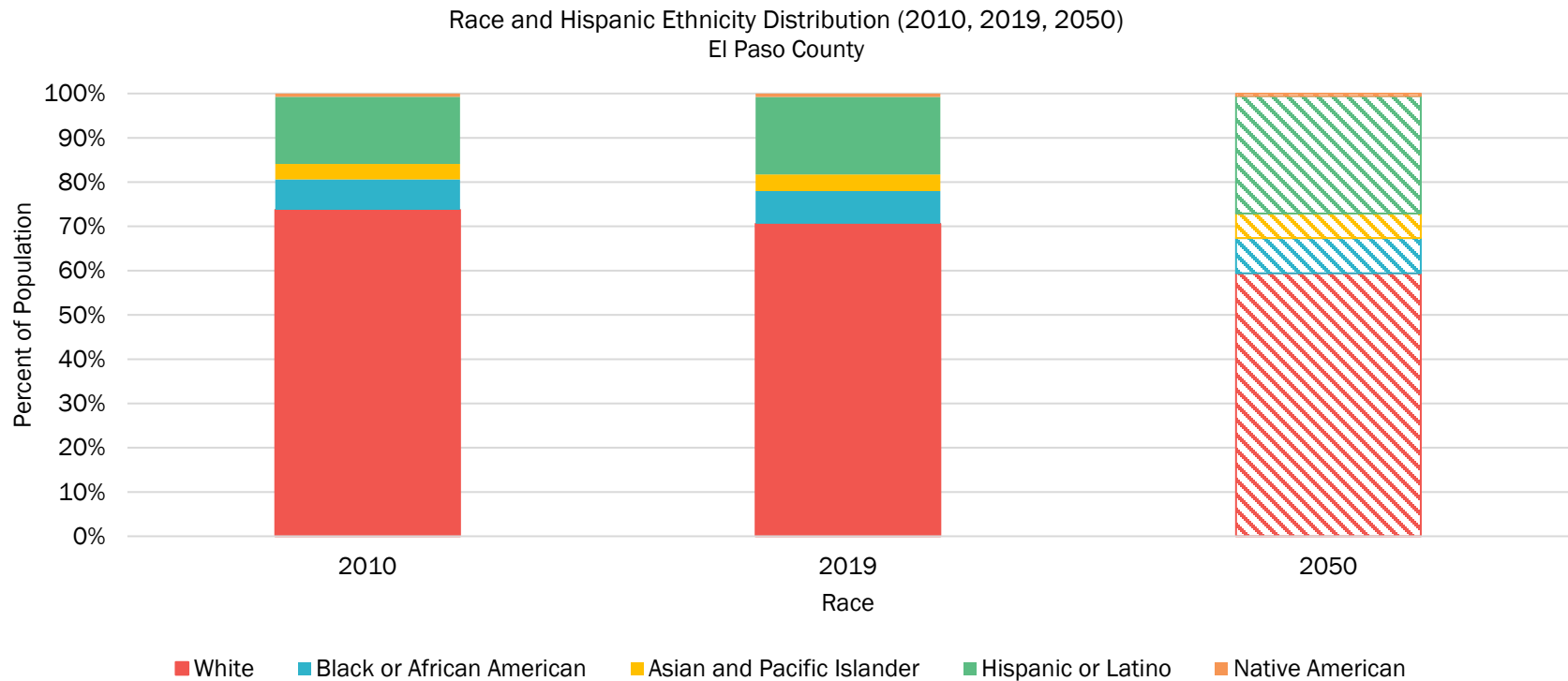


Source: Woods & Poole, Houseal Lavigne Associates

Race and Ethnicity

- El Paso County is majority white; however, the population is becoming more racially and ethnically diverse with the largely due to the increase of the Hispanic population in the County.
- This trend is projected to continue through 2050, with the Hispanic population accounting for one quarter of the County’s total population. Note that Hispanic is defined as an ethnicity in the United States and a person of any race may identify as Hispanic.

Figure 1-11. Race and Hispanic Ethnicity Distribution

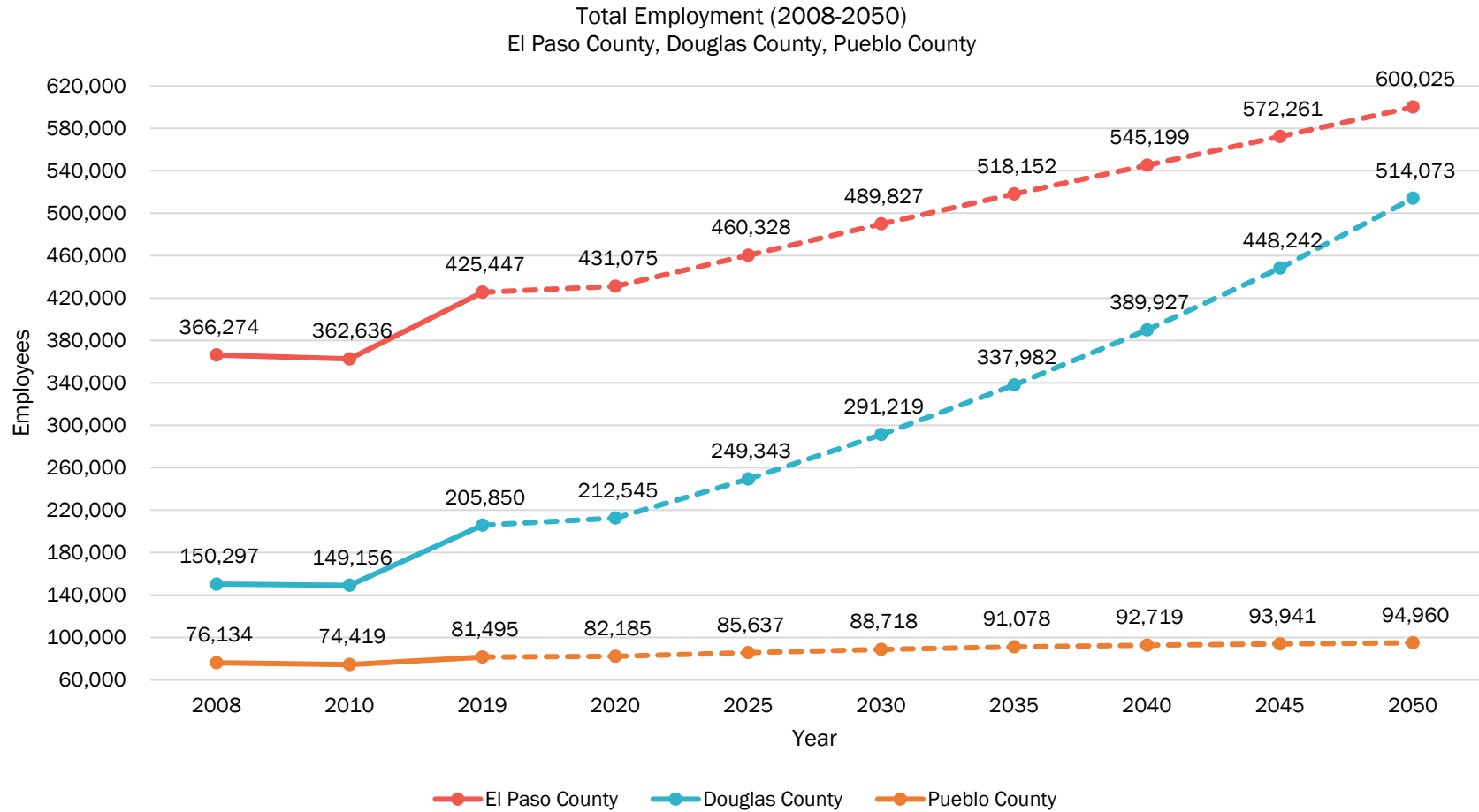


Source: U.S. Census, Woods & Poole, Houseal Lavigne Associates

Employment

- El Paso County maintains a diverse economy with significant employers in a wide range of sectors and no single industry accounting for a majority of the County's employment base.
- Total employment in El Paso County has steadily increased since 2010 and now significantly exceeds prerecession levels. Between 2008 and 2010, El Paso County lost a total of 3,638 jobs representing a decrease of about one percent. The County and the State of Colorado as whole were less effected by the recession than the rest of the country.
- Douglas and Pueblo counties have experienced employment growth as well since the recession, however Douglas County's has seen greater percentage growth than both Pueblo and El Paso.
- The majority of El Paso County's job gains since 2010 were in four sectors: Health Care and Social Assistance (+11,855 jobs), Accommodation and Food Services (+2,040 jobs), Construction (+8,432 jobs), and Retail Trade (+6,543 jobs).
- The U.S. Military has had a continued significant presence in El Paso County with five installations employing over 37,000 people (8.7 percent of the County's workforce), even though the sector lost 2,049 jobs from 2010-2019.
- Overall, El Paso County is projected to gain 174,578 jobs from 2019-2050, a growth of 41 percent, indicating the continuing strength of the County's economy.
- Healthcare and Social Assistance is projected to gain the most jobs through 2050 (50,735) as well as remain the largest employment sector in the County (15 percent). Manufacturing is projected to lose 3,600 jobs over the same time period, the industry with the greatest decrease.
- Unemployment has decreased since 2010 in both El Paso County and the State with a rate of 6.8 and 5.2 percent respectively.

Figure 1-12. Total Employment



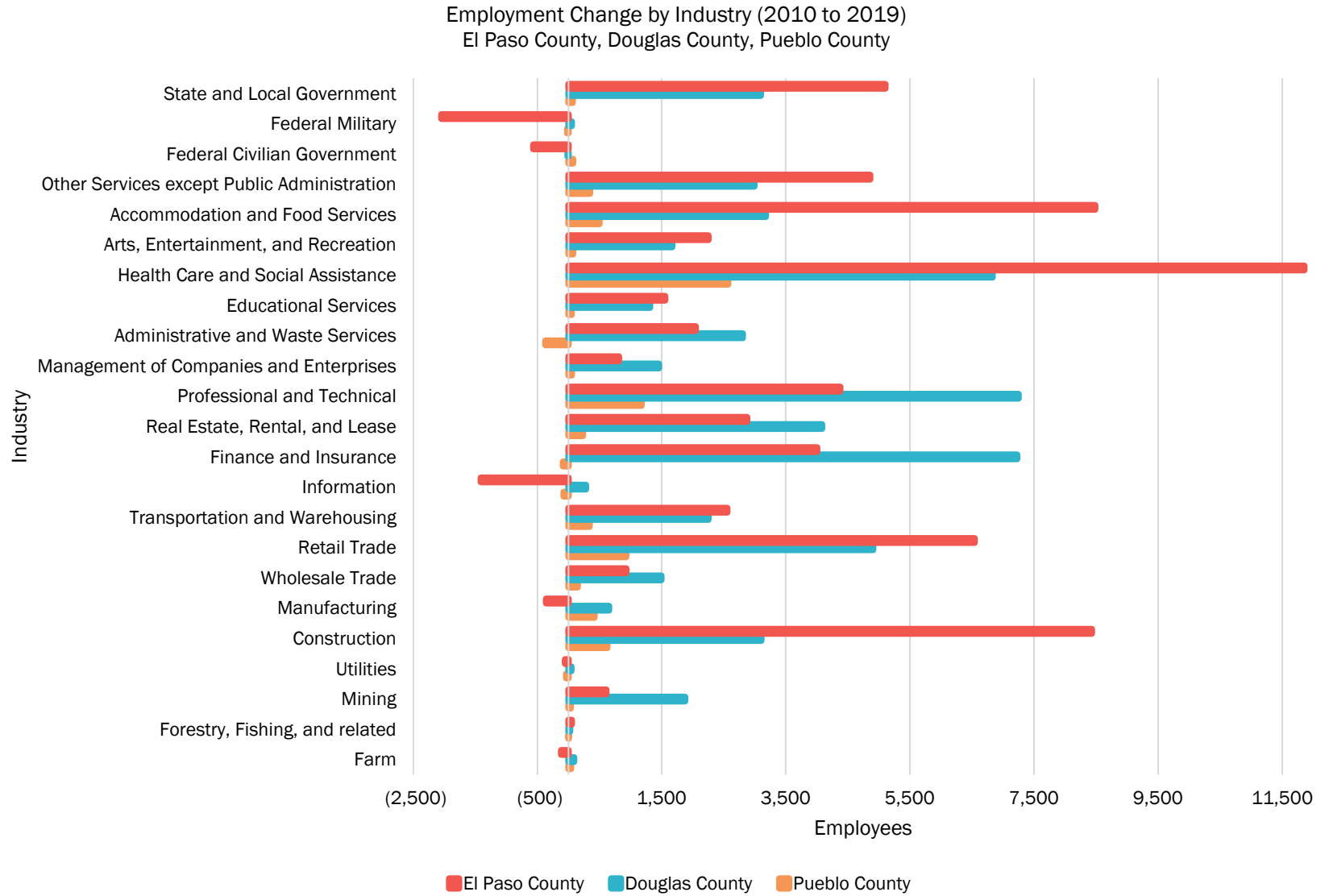
Source: U.S. Census, Woods & Poole, Houseal Lavigne Associates

Table 1-1. 2019 Employment by Industry

Industry	Number	Percent
Farm	1,299	0.3%
Forestry, Fishing, and related	447	0.1%
Mining	2,184	0.5%
Utilities	622	0.1%
Construction	26,485	6.2%
Manufacturing	13,334	3.1%
Wholesale Trade	6,913	1.6%
Retail Trade	42,405	10.0%
Transportation and Warehousing	7,771	1.8%
Information	7,065	1.7%
Finance and Insurance	24,717	5.8%
Real Estate, Rental, and Lease	19,596	4.6%
Professional and Technical	35,235	8.3%
Management of Companies and Enterprises	1,986	0.5%
Administrative and Waste Services	25,413	6.0%
Educational Services	9,229	2.2%
Health Care and Social Assistance	41,839	9.8%
Arts, Entertainment, and Recreation	10,614	2.5%
Accommodation and Food Services	33,479	7.9%
Other Services except Public Administration	23,347	5.5%
Federal Civilian Government	12,263	2.9%
Federal Military	37,086	8.7%
State and Local Government	40,099	9.4%
Total	425,447	100.0%

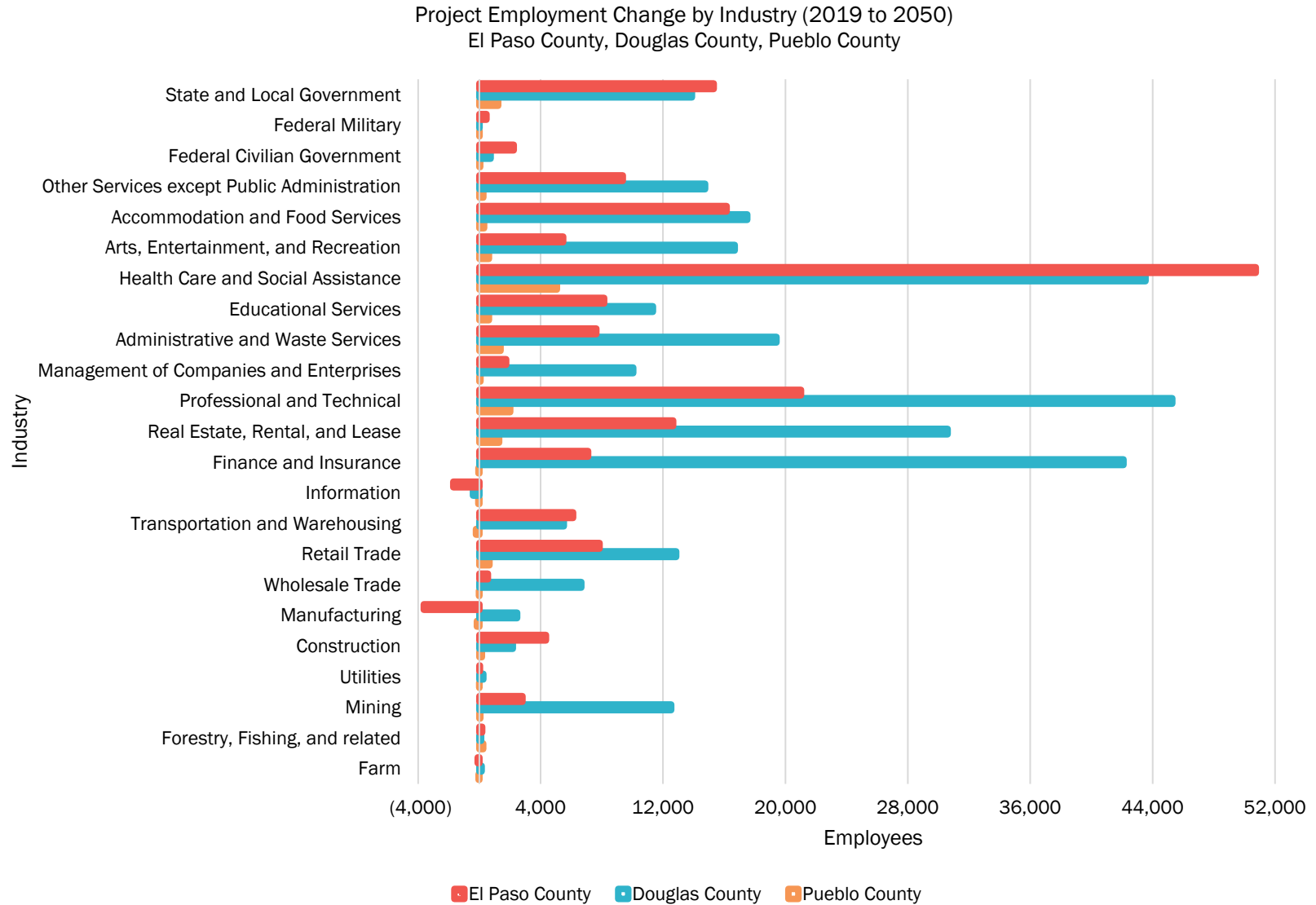
Source: Woods & Poole, Houseal Lavigne Associates

Figure 1-13. Employment Change by Industry



Source: Woods & Poole, Houseal Lavigne Associates

Figure 1-14. Projected Employment Change by Industry



Source: Woods & Poole, Houseal Lavigne Associates

2. Market

The context of a countywide market assessment is much different than that of a municipality, particularly as it relates to nonresidential uses. The majority of the uses and the built environment, as well as a large percentage of demand, are contained within the existing boundaries of cities, towns, and census designated places. The market assessment outlined in this report, provides data on El Paso County as a whole. Market areas and development potential will be dependent on use and location. Supply and demand within individual market sectors helps determine the potential for those markets to emerge or expand in a community. This section of the report presents an analysis of office, industrial, and retail sectors, their existing capacities, and future economic forecasts for each sector. Data for this section is from CoStar, a provider of real estate analytics.

Glossary

Net Absorption

Net absorption is the total occupied square feet (move-ins) minus the total space vacated (move-outs) over a specified time period for existing buildings only. Lease renewals are not included in net absorption calculations; however, when a lease renewal includes additional space, the additional space is counted. Preleasing of nonexistent or partially constructed buildings (planned under construction or under renovation) is not included in the calculation until the actual move-in occurs.

Rentable Building Area

Rentable building area is the total square footage of rented usable area. This includes the space a tenant will occupy, plus the related common areas of the building such as lobbies, hallways, bathrooms, operations rooms, etc.

Vacancy Rate

Vacancy rate is the amount of vacant spaces (whether new or existing) divided by the existing rentable building area. This rate is shown as a percentage.

Graphs

The graphs in this section show two sets of data on the y-axis over the same time period. The bars on the primary axis represent average rent prices, which is expressed along right y-axis. The other is a line graph that represents vacancy rates, which is shown along the left y-axis.

Study Area

El Paso County was analyzed in comparison to two other regions, Douglas County and Pueblo County, as well as the State of Colorado.

Office

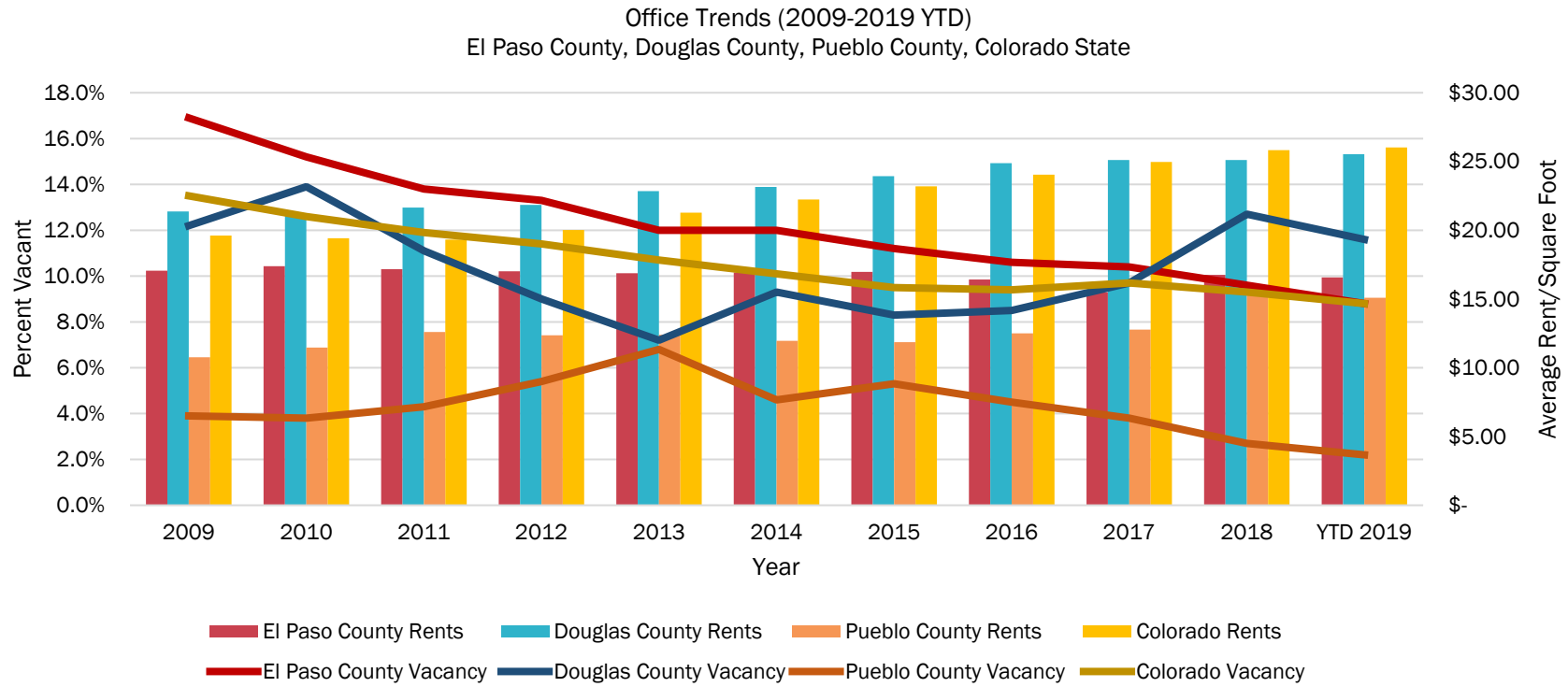
In the second quarter (Q2) of 2019, El Paso County had a vacancy rate of 8.8 percent, consistent with the vacancy rate across the entire state. El Paso County's vacancy rate has reached a low not experienced since before the 2008 recession. This is largely due to greater leasing activity from smaller tenants in existing buildings, particularly in the Northeast submarket. This submarket includes Black Forest, Gleneagle, Briargate, and parts of Falcon, Peyton, and Calhan. The stronger leasing from smaller tenants in existing space is likely related to the growth and subsequent expansion of existing businesses in the County. There is, however, a large office development (109,000 square feet) under construction in the Northeast submarket just south of Interquest Parkway with an expected completion date of December 2019.

Douglas County has a higher vacancy rate at 11.6 percent, but Pueblo County's rate is four times lower than El Paso's at 2.2 percent. It should be noted, however, that Pueblo County contains only about one-eighth the inventory of El Paso County. Pueblo's lower vacancy rate can also be attributed to minimal development combined with a significantly smaller inventory and little turnover.

Office rents in El Paso County have fluctuated slightly over the past decade, reaching their lowest point in 2017 at \$15.49 per square foot. Since then, however, rents have grown by seven percent. Douglas County has higher rental rates than El Paso County largely due to higher rents and greater demand in the Denver market. As a smaller market, Pueblo County's rents are lower than El Paso's, however, they have grown by 18 percent since 2017.

While the office market in El Paso County has experienced rent fluctuations in the past decade there has been steady overall growth since 2009. A regularly declining vacancy rate, caused by growing smaller, local businesses suggests desire for office uses in the County. These recent and longer-term changes coupled with planned larger-scale office developments indicate growing confidence in the market.

Figure 2-1. Office Market Trends



Source: Costar, Houseal Lavigne Associates

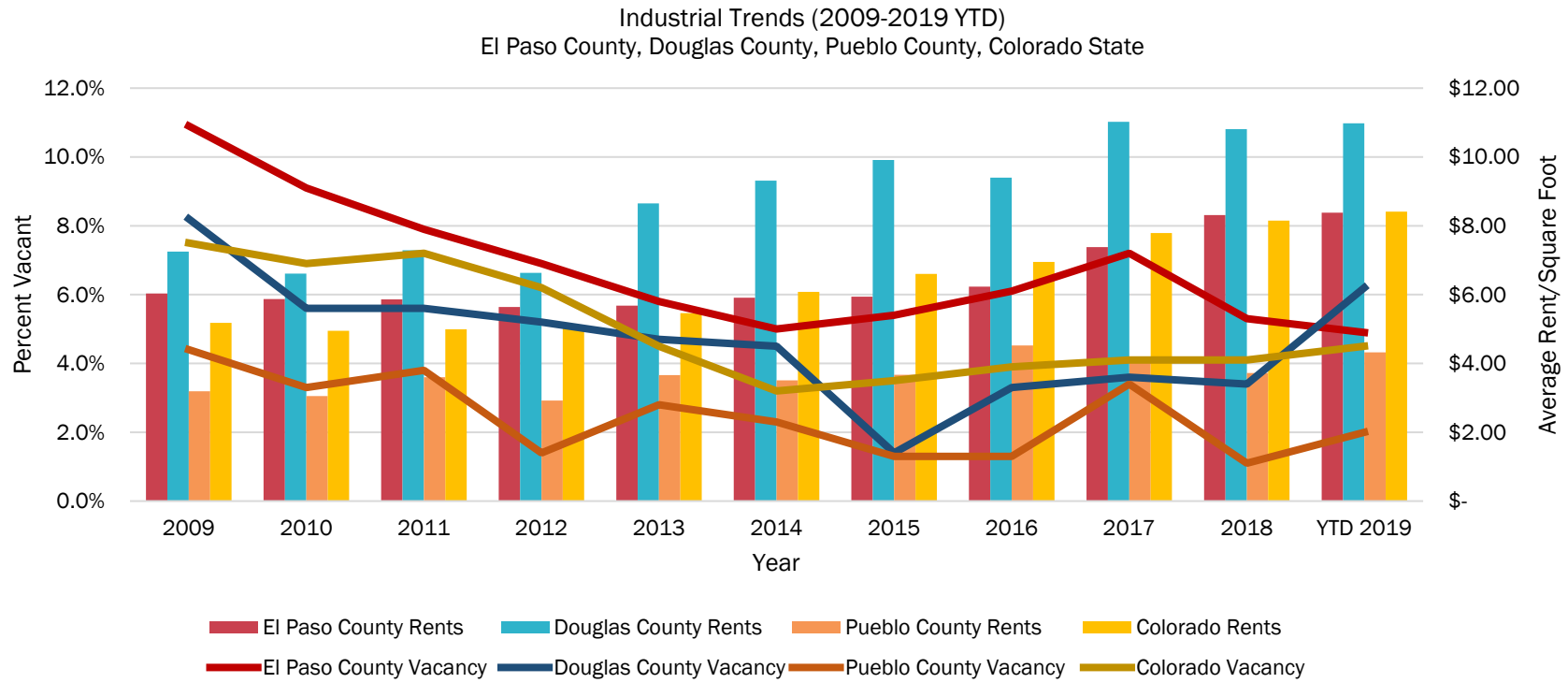
Industrial

El Paso County has a vacancy rate of 4.9 percent for the second quarter (Q2) of 2019, which is slightly higher than the State's rate. Like the office market, the County's industrial vacancy rate has reached a pre-recession low. This is due to a number of recent large-scale leases across the County including a 200,000-square-foot building in Fountain Business Park and a 144,000 square foot building in Colorado Springs. Each of these leases is in a different submarket noting opportunity and demand is not concentrated in one area. There is a large industrial development (100,000 square feet) under construction in the Northwest submarket on Buckingham Drive that is expected to be completed in 2020. This development is part of a potentially large-scale 800,000-square-foot flex industrial campus for T5 Data Centers. Additionally, there are several proposed industrial projects ranging from 10,000-110,000 square feet within the Commercial Aeronautical Zone (CAZ) that could take advantage of adjacency to the Colorado Springs Airport (COS). Companies like TF Data Centers already have existing buildings in the County are building additional, larger developments to expand their business in the County. Douglas County has a higher vacancy rate at 6.2 percent, but Pueblo County's rate is less than half of El Paso's at two percent. Similar to the office market, Pueblo County's industrial market is only a fraction (one-third) of El Paso County's in terms of square footage of total inventory. Minimal development combined with significantly smaller inventory and little turnover can be attributed to Pueblo's low vacancy rate.

Rents in El Paso County have been steadily climbing since 2012 with significant growth (38 percent) since 2016. The average rent for industrial space for the entire State is only three cents per square foot higher than in El Paso County, which indicates the County is average representation for the industrial market in the State. Douglas County's rental rates are more than two dollars higher than El Paso County's and Colorado's, which again is due to its inclusion in the Denver metro market, which itself is experiencing robust demand caused, in part, by growth in the marijuana industry. While marijuana production and distribution is legal across the State, many counties like El Paso have more stringent regulations on when and where both can occur, particularly in terms of unincorporated areas. While As a smaller market, Pueblo County's rents are lower than El Paso's.

Steady rent growth in the El Paso County industrial market combined with sharply declining vacancy rates since 2017 indicate strengthening of the market. Recent and planned large-scale industrial and flex developments across the County also suggests desire for industrial space in El Paso County. These recent and longer-term changes coupled with planned developments indicate growing confidence in the market.

Figure 2-2. Industrial Market Trends



Source: Costar, Houseal Lavigne Associates

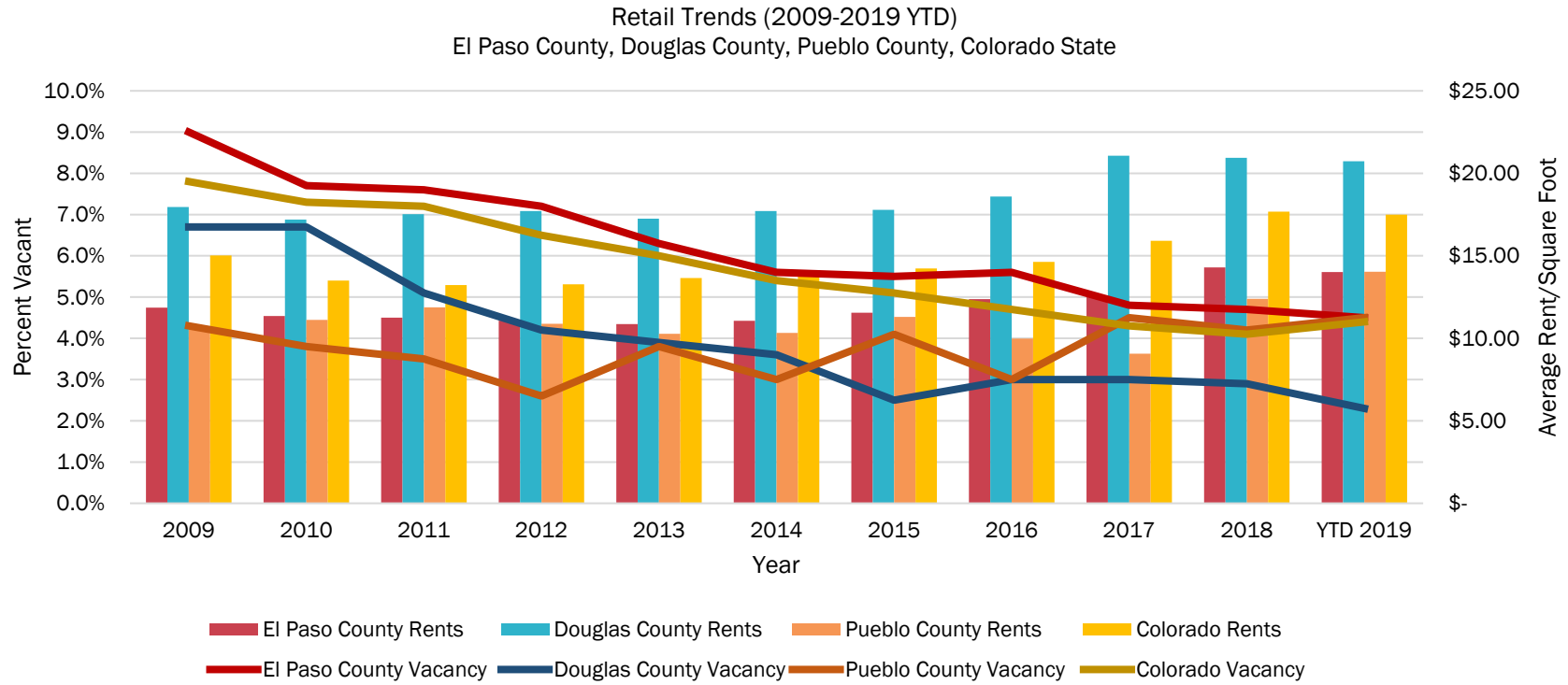
Retail

El Paso County's retail vacancy rate is 4.5 percent for the second quarter (Q2) of 2019, which is slightly higher than the State's rate. Again, like the office and industrial markets, this is a vacancy rate the County hasn't experienced in over decade. Even with several significant retailers closing in the County including Whole Foods Market (27,700 square feet), Gordmans (80,000 sf), and Toys R Us (80,000 sf), leasing has grown in the County. Fifteen properties were built across the County in 2018 totaling over 113,000 square feet. Thus far in 2019, 18 properties have been built (151,000 sf) and another 20 new developments are proposed however most of them are concentrated in the northeast. Existing businesses are expanding into larger spaces as well such as King Soopers at Claremont Ranch Marketplace south of Constitution Avenue. Douglas County has a significantly lower vacancy rate at 2.3 percent, and Pueblo County's rate is the same as El Paso's at 4.5 percent. Being a part of the Denver metro retail market, Douglas County has capitalized on the prevalent demand for retail in the region with commercial growth down the Interstate 25 corridor. However, it has done so without incurring the higher development costs of an urban area such as in the City of Denver.

Average retail rents in El Paso County have increased by 29 percent since 2013. Average rents for the State are nearly \$10 per square foot higher than in El Paso County. Douglas County's rents generally match the Colorado state average, due to the influence of the Denver metro market. Pueblo County's rents are only one dollar lower than El Paso's, which has seen over 50 percent growth since 2017.

Rent growth since 2013 and an overall declining vacancy rate since 2009 suggest continual interest in El Paso County's retail market. Recent vacancies of larger properties represent fluctuation in the County which correlate to change in the market. However, expansion of existing retail businesses and planned developments still indicate confidence in the overall market. Even with recent vacancy trends, retail continues to be a strong market in El Paso County.

Figure 2-3. Retail Market Trends



Source: Costar, Houseal Lavigne Associates

3. Housing Conditions

This section summarizes analyses related to the El Paso County housing market. Data from the American Community Survey, El Paso County, Woods & Poole, and CoStar was used to conduct the analyses included in this report.

Income Comparison

The following analysis compares existing housing values in El Paso County with household incomes. The evaluation is conducted by occupancy tenure, looking at both owner and renter households.

For El Paso County, a total is provided that deducts the households in each income range from the total “attainable housing units” for that income range. Attainable housing units are defined as costing no more than 30 percent of annual income at the market rate.

In the tables that follow, positive values indicate there are more attainable housing units for the corresponding income range than households (oversupply). Negative values indicate there are more households in the income range than corresponding affordable housing units (undersupply). The total discrepancy between households and attainable housing units determines the existence of surplus or demand.

- For owner households, the income comparison identifies a shortage of attainable housing units for existing households with incomes between \$10K-\$49,999K per year as well as those earning more than \$100,000 per year. For the highest-income households, lack of housing options is not a significant issue as they can easily afford a lower-value home where a surplus exists. However, high negative values in the \$100K+ income range may also signal a shortage of higher-end housing in the County.
- For renters, the shortages are most apparent for lower-income households with incomes less than \$25,000 a year. This indicates a lack of attainable, market-rate housing units for them to rent in their price range. Thus, many County residents may be experiencing a housing cost burden (i.e., spending 30 percent or more of annual income on housing).

Table 3-1. Owner Affordability

INCOME RANGES											
Community	<\$5K	\$5K-9,999	\$10K-14,999	\$15K-19,999	\$20K-24,999	\$25K-34,999	\$35K-49,999	\$50K-74,999	\$75K-99,999	\$100K-149,999	\$150K+
El Paso County	1,259	49	-2,650	-2,883	-3,478	-4,828	-3,907	15,294	9,631	-1,992	-6,497
Douglas County	-95	-234	-630	-702	-1,157	-2,602	-3,463	-4,981	1,010	9,417	3,438

Source: U.S. Census, American Community Survey, Houseal Lavigne Associates

Table 3-2. Renter Affordability

INCOME RANGES									
Community	<\$5K	\$5K-9,999	\$10K-14,999	\$15K-19,999	\$20K-24,999	\$25K-34,999	\$35K-49,999	\$50K-74,999	\$75K+
El Paso County	-3,304	-3,503	-4,744	-3,491	-1,318	7,188	12,053	5,038	-10,126
Douglas County	-428	-210	-537	-590	-585	-1,151	1,657	5,249	-4,148

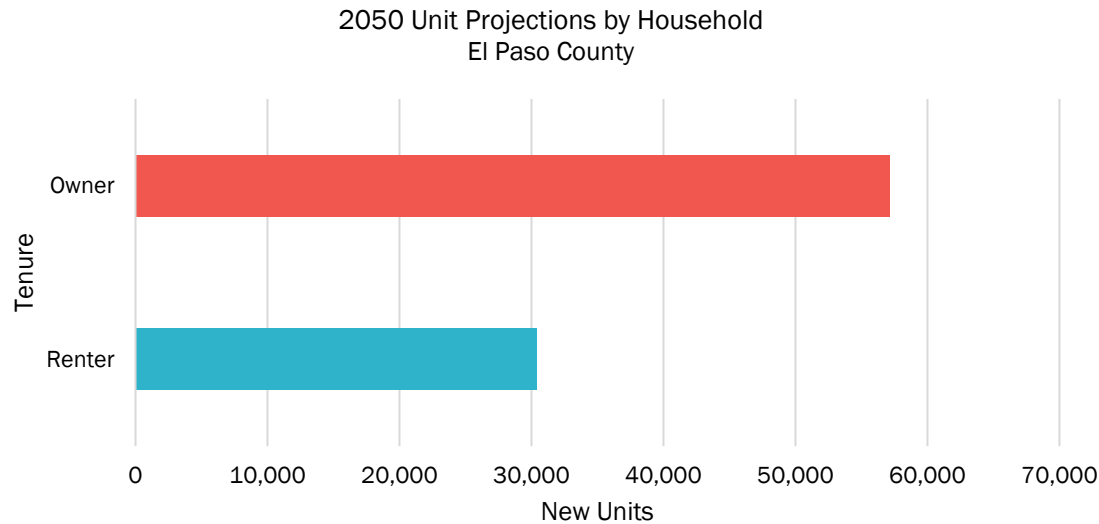
Source: U.S. Census, American Community Survey, Houseal Lavigne Associates

Household Projections and Needs Assessment

The needs assessment analysis calculates the number of additional units needed based on existing tenure ratios (the number of owner households vs. renter), with consideration of existing vacancy rates. Assuming that the ratio of owners to renters is stable within the County, the needs assessment determines the total new owner and renter households for 2050 based on the projected increase of 93,489 new households.

- Existing vacant units can only accommodate approximately 5,900 (six percent) of the projected new households, two-thirds of which are rental housing. Based on this assessment, it is projected that the County will still need to construct 87,621 new housing units through 2050. This will require significant development/redevelopment of available land and careful planning in the County.

Figure 3-1. Status Quo Unit Projection by Household Tenure



Source: U.S. Census, American Community Survey, Houseal Lavigne Associates

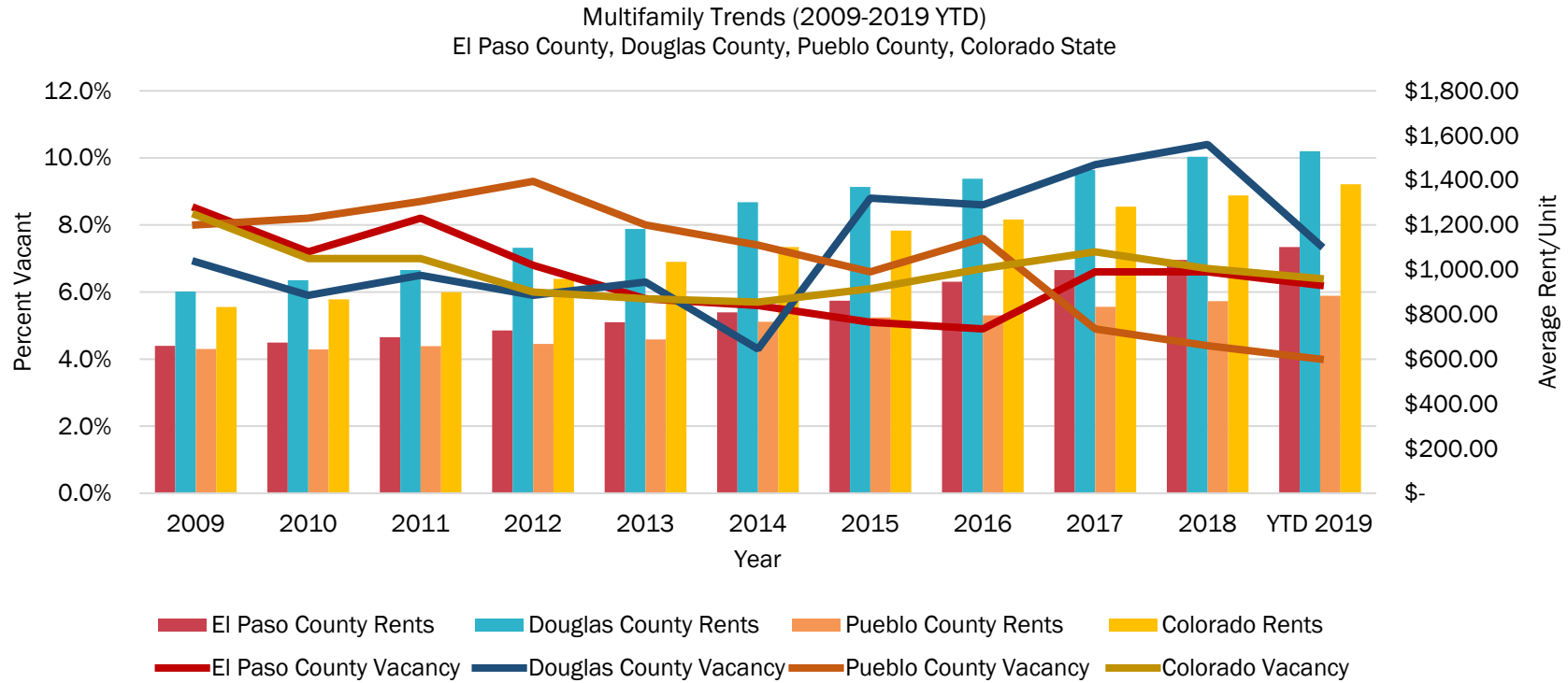
Multifamily

Multifamily vacancy in El Paso County is 6.2 percent for the second quarter (Q2) of 2019, which is slightly lower than the Colorado's rate. This is a slight decline from 2017 and 2018 but still an increase from 2013-2016 rates. Fifteen new multifamily developments were built from 2018-YTD 2019 totaling over 2,000 units. Several of these buildings have just begun to lease, which is attributing to the higher vacancy rate over the last two years. However, increasing population growth over the past decade as well as projected growth over the next decade correlate to increased housing demand in the County. The Denver market (including Douglas County), however, has experienced slower growth rates. However, vacancy rates may increase over the next year with the projected influx in supply (over 2,000 units), which is expected to mostly be in the northern areas of the County. Pueblo County has a lower vacancy rate caused by its smaller inventory and the lack of new multifamily development over the past three years.

Retail rents have been climbing in El Paso County over the past 10 years which have grown by 67 percent. Rents for the State are nearly \$300 per unit higher than in El Paso County (\$1,382). Douglas County's rents are even higher than Colorado's (\$1,530) due to outward growth from Denver and the County's proximity to the City. Pueblo County's rents are far lower than El Paso's, again due to its significantly smaller market.

El Paso County's recent and expected population growth is a strong indicator for increased housing demand in the County. Continual rent growth since 2009 suggests a strengthening market. Higher vacancy rates could reference slowing demand, however an influx of supply to capture projected population growth is likely the leading factor. Increasing demand from population growth coupled with planned and projected new supply indicates increasing confidence in El Paso County's multifamily market.

Figure 3-2. Multifamily Market Trends



Source: Costar, Houseal Lavigne Associates

Market-Rate Multifamily

- El Paso County is projected to gain 93,489 households between 2019 and 2050. Currently, 37 percent of the County’s existing households are renters. This number is expected to increase to 41 percent, aligning with growing renter trends since 2000 and a compound annual growth rate (CAGR) of three percent in renter households since 2010. Thus, renter housing is expected to be demanded at a greater rate than in previous years in the County.
- Currently, the average effective monthly rent for a multifamily unit in El Paso County is \$1,125. Assuming households spend up to 30 percent of their annual income on housing, a household would need to earn \$45,000 annually to afford the effective rent.
- Accounting for the number of households that earn at least \$45,000 per year and subtracting the 2,619 units in the 20 under-construction or planned apartments across the County, El Paso County will need approximately 14,613 market-rate units.

Table 3-3. Market-Rate Rental Unit Analysis

	EL PASO COUNTY
	2019 - 2050
Household Growth	943,489
Renter Percentage	41%
Potential New Renters	38,330
Renter Households Earning At Least \$45,000	45%
Potential Income-Qualified Renters	17,232
Planned Market-Rate Units	2,619
El Paso County Market-Rate Apartment Demand	14,613

Source: American Community Survey; Woods & Poole; CoStar; Houseal Lavigne Associates

Attainable Multifamily

When discussing affordable housing, and to effectively communicate with all County residents, it is important to establish the difference between affordable housing and market-rate housing. For the purposes of this report and the El Paso County Master Plan, “attainable housing” is defined as units as costing no more than 30 percent of annual income. Naturally occurring affordable housing (NOAH) is comprised of market-rate housing and operates without subsidy. NOAH properties provide housing at rates affordable to low- and moderate-income households. “Affordable housing” refers to units that are made affordable through means of various subsidies provide by the local, state, or federal government.

- Currently, El Paso County has about 53 properties totaling just over 3,800 affordable housing units, 97 percent of which are in the City of Colorado Springs.
- Roughly 55 percent of renter households in El Paso County earn less than \$45,000 a year (the annual income needed to afford the average effective monthly rent for a multifamily unit in El Paso County). Accounting for the 300 affordable (with some form of subsidy) planned and under-construction units El Paso will have a potential demand for 20,799 attainable units.
- The El Paso County Economic Development Department and the El Paso County Housing Authority (EPCHA) administer several housing funds to help provide attainable housing options throughout the County. In 2018 they helped open, a 180-unit senior housing development using state housing tax credits. The two organizations also helped 227 existing County households procure housing assistance. Continued efforts from the Economic Development Department and EPCHA could help meet the projected attainable housing demand in El Paso County.

Table 3-4. Attainable Rental Unit Analysis

	EL PASO COUNTY
	2019 - 2050
Household Growth	943,489
Renter Percentage	41%
Potential New Renters	38,330
Renter Households Earning Less Than \$45,000	55%
Potential Income-Qualified Renters	21,099
Planned Affordable Units	300
El Paso County Attainable Apartment Demand	20,799

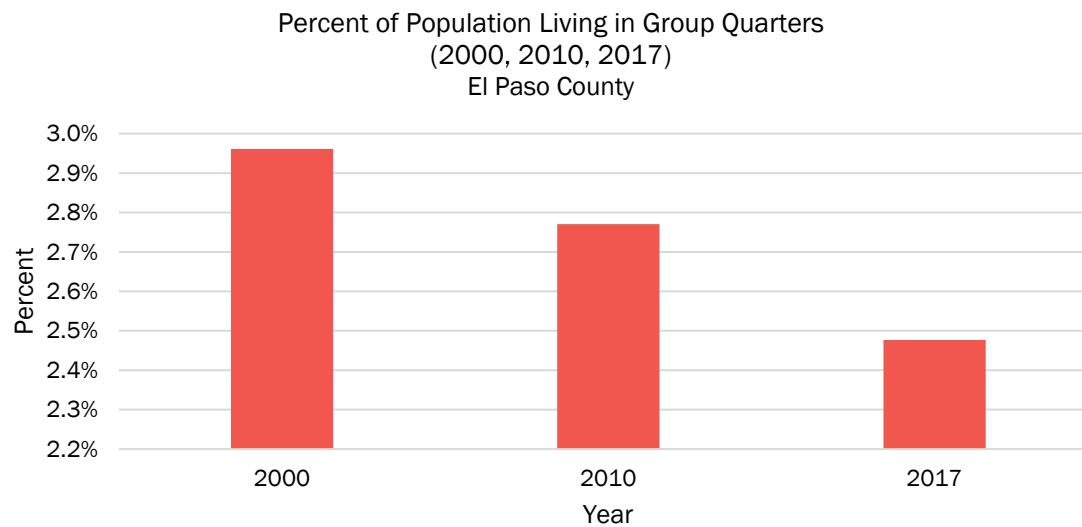
Source: American Community Survey; Woods & Poole; CoStar; Houseal Lavigne Associates

Group Quarters

With its strong military presence (five installations) as well as several higher-education institutions, El Paso County has a significant number of its population living in group quarters. Group quarters are nontraditional residences where a group of people reside (permanently or temporarily), and the owner of the property provides housing and/or services for the residents. Group quarters residents are most commonly unrelated and do not require a traditional housing type. They often include college/university residence halls, military barracks, nursing homes, and correctional facilities. In 2000, three percent of El Paso County's population lived in group quarters.

- This number has slightly declined since then, likely due to the overall exponential population growth in the County in the past 19 years.
- While the percentage of the population living in group quarters is declining, the military will remain a strong presence and employer in the County. This will necessitate continued coordination with these institutions to ensure they have appropriate space for any growth or changes to their installations that their current available land cannot accommodate.

Figure 3-3. Population Living in Group Quarters



Source: U.S. Census, American Community Survey, Houseal Lavigne Associates

4. Data Sources

Below is a brief description of the data sources used in this report. More detailed information can be found on each source's home page.

American Community Survey

A subset of the Census Bureau, the American Community Survey provides additional estimates each year for all census designated places in the country.

CoStar Realty Information Inc.

CoStar is an international real estate database that tracks and monitors office, industrial, and retail properties for data including sales, leasing, vacancy, absorption, etc. This information is used in the Market section.

Houseal Lavigne Associates

A professional consulting firm specializing in all areas of community planning, urban design, and economic development. All analyses and calculations included in this report were conducted by Houseal Lavigne.

International Council of Shopping Centers (ISCS)

An international organization focused on monitoring retail trends in both physical development and overall economic affect. ISCS maintains national standards and averages related to retail spending, building types, sizes, construction costs, etc.

United States Census Bureau

The national collector and provider of demographic data for and pertain to the United States. The Census Bureau is the U.S.'s official federal department for demographic, economic, housing and related information.

Woods & Poole

Provider of current and past demographic and economic data along with long-term projections for various geographies across the United States.