Highlights - September 2024

I will be doing an economic presentation on the national and state economies at the **Colorado Leadership Summit** in Denver on October 9th. They have graciously provided the registration link and promo code for anyone in my network who wants to attend. The promo code makes it free to you (and tickets are normally $200). Promo Code: **TatianaBailey; Econ Presentation Link.**

In September 2024, The University of Michigan preliminary **Consumer Sentiment {Page 3}** stood at 69.0, up from 67.9 in August signaling a *mild uptick* in consumer confidence. This survey asks many questions about price levels, and the gains in the overall index for September were led by positive perceptions of prices for "durables" (think goods that you use for a while). These positive (price) perceptions are perhaps driving the consistently strong retail sales numbers (which in August were mostly driven by e-commerce). Year-ahead expectations for personal finances also improved, while there was a modest weakening amongst survey respondents in their views of the labor market. The other major consumer confidence index produced by The Conference Board is more heavily skewed towards perceptions of the labor market, and that most recent survey *declined* due to deteriorating feelings about the jobs market. Even though the University of Michigan (UM) sentiment is well below pre-pandemic levels, it's still much improved from the lowest point in June of 2022 when inflation peaked.

Part of the reason consumers are still reticent about our economy is the election and the uncertainty it creates. UM released a report last week about the election, and it showed that an increasing proportion of both Republicans and Democrats are now saying in their survey responses that they anticipate a Harris win (58%) over a Trump win (34%). The survey does not ask who they want to win – just who they expect to win. The survey also showed 41% think Harris is better for the economy than Trump (35%) while there is a tie for which candidate is better for personal finances (both at 37%). The balance of 100% belongs to respondents who said there is "no difference" between candidates. As expected, people answer these questions about which candidate is better for the economy or for personal finances reflecting their preferences. However, Independents will likely decide the election, and 57% of them believe Harris will win while only 37% believe Trump will win. We know these last few weeks can shift, but I find these margins notable and perhaps more telling than asking, "Who will you vote for?" Also telling is that historical correlations between consumer sentiment and election outcomes shows that when sentiment is on the upswing (like it has been since June 2022), the incumbent or his/her party typically wins.

Job Openings {Page 3} in the U.S. were down 3.0% (at 7.7 million) in July compared to the previous month and down 12.9% compared to July 2023. This trend suggests that businesses are scaling back their hiring plans as economic growth stabilizes after the pandemic disruption. In August in Colorado Springs, the **Total Number of Job Openings {Page 4}** dropped to 19,449 from 20,682 in July, reflecting a similar pattern of contraction. In terms of the most demanded occupations, truck drivers dropped off the top 10 list and food managers entered the top 10 as shown in the table. The number unemployed rose slightly (by about 200 people), so the number of workers per available job rose from 0.83 to 0.89.

The U.S. **Unemployment Rate {Page 3}** dropped slightly from 4.5% in July to 4.4% in August, while Colorado and El Paso County saw marginal increases. In Colorado, the unemployment rate rose from 4.2% in July to 4.3% in August, and El Paso County's rate climbed from 4.4% to 4.5% in the same period. Although still within range of "normal" or "frictional" unemployment, the Federal Reserve is well aware of the uptick in unemployment and cooling in job openings. The Fed exists for two reasons: to ensure a stable labor market with "normal" unemployment and maintain a roughly 2.0% inflation rate.

Which brings us to the U.S. **Consumer Price Index, or CPI {Page 3}**, which rose 0.2% from July to August 2024, with core inflation (excluding food and energy) slightly higher at 0.3%. Year-over-year, the CPI for all items increased by 2.5% in August, down from 2.9% in July, signaling notable easing of inflation. However, core inflation held steady at 3.2%, and as I state in this Fox21 segment, had energy prices not pulled the headline number down, the CPI would not have come down as much. What is still exerting some upward pressure in prices is housing and healthcare.

This slight moderation in inflation helped solidify a stronger-than-expected half-point **Interest Rate {Page 3}** cut, which I discuss in detail here, including the impacts I think these cuts will have on the presidential election. This was mirrored in mortgage rates, which saw a decrease from 6.85% in July to 6.50% in August, with rates even lower at 6.09% as of September 24th. Lower mortgage rates will provide some relief to homebuyers, and I deviate a bit from other economists who say the impacts of lower interest rates (including on housing) will be slow. There are too many buyers and sellers who have been grudgingly waiting for cuts, and many will jump in during the coming 3-12 months as mortgage rates decline with not only current rates but expectations of future (lower) rates. There is also a structural housing shortage, and that too creates eager buyers.

Poverty Rates {Page 4} in the U.S. saw a slight decrease from 12.6% in 2022 to 12.5% in 2023, while El Paso County experienced a more substantial drop, with poverty rates falling from 8.3% in 2022 to 7.0% in 2023. A local poverty rate that is almost half of the U.S. rate is notable.

Educational Attainment in Colorado Springs {Page 5} data for 2023 was just released. When looking at bachelor's degrees or higher, the City of Colorado Springs saw a notable decrease among 18-to-24-year-olds, dropping from 17.4% in 2022 to 15.3% in 2023. Colorado as a whole saw a similar decline, though both locally and statewide we remained above the national average, which didn't change at 13.4% for this age cohort. For those aged 25 and older, there was a small increase in the percentage holding bachelor's degrees or higher across the U.S., Colorado, and Colorado Springs (43.8% in 2022 to 44.8% in 2023). The graphs visualize our consistently higher-than-U.S. educational attainment rates, while comparisons with our state vary depending on the age cohort and attainment type.

For "some college or an associate degree," the 18-to-24-year-olds in the City of Colorado Springs had an increase in this educational attainment level from 2022 (39.5%) 2022 to 2023 (42.4%). However, for those aged 25 and older, educational attainment remained relatively flat in the U.S., Colorado and in our city.

In the housing market, **Home Sales {Page 6}** in the Pikes Peak region were relatively stable, with a slight decline from 1,127 in July to 1,064 in August. There was no change in new, home single-family permits pulled in August, and multi-family permits remained very low, with only 16 multi-family units approved in August, compared to 20 in July. This is good because the glut of multi-family permits and construction before rate hikes has caught up with us. Rental conditions are soft, with **Apartment Vacancy Rates {Page 6}** climbing from 11.8% in Q1 2024 to 12.2% in Q2. Rents in Colorado Springs also rose slightly from $1,473 in Q1 to $1,490 in Q2, although this still represents a $10 decline compared to the previous year. Denver's rental market saw a similar increase in rents, with Q2 rents at $1,883. With respect to housing, we see that the overall structural housing shortage – to buy or rent – is keeping prices at elevated levels. Single-family existing home prices were 50% higher (at $422,100) in August of this year compared to August 2019 ($281,900), while existing home inventory was 26% lower in August of this year compared to August of 2019.

Sales and Use Tax {Page 7} collections in Colorado Springs for August 2024 was $22.0 million, based on July sales, marking a 2.1% decline from the previous month but a 3.3% increase compared to the same month in 2023. This suggests that while month-to-month consumer spending may have softened slightly, year-over-year growth remains positive. I think of local sales and use tax as a proxy for local consumer confidence, which these numbers suggest is steady and positive.

The hospitality industry, particularly in Colorado Springs, experienced a noticeable decline in August. The **Hotel Occupancy Rate {Page 7}** dropped from 80.3% in July to 75.8% in August, with a significant downward revision for July numbers as well. This seems odd given it reflects summer months, but there is a lot of buzz across economic circles that consumers are pulling back on "extras." Denver saw a more moderate decline, but a decline, nonetheless. Local **RevPAR {Page 7},** followed a similar trend, dropping from $150.63 in July to $125.51 in August, while Denver saw a smaller decline from $136.87 to $132.30.

When I step back, I still marvel at the resiliency of the U.S. economy after the pandemic disruption with over two years of high interest rates and an upcoming federal election. After a long period of high interest rates, I believe the Fed pivot will further strengthen the economy barring any geopolitical or other "shocks." At a household level, I hope the lower interest rates will bring some reprieve to those individuals who appear to be using credit cards to finance daily expenses. Those credit card borrowing levels and delinquencies are worrisome, especially alongside the even-lower U.S. savings rate, which fell again in July to 2.9%. That rate is less than half of what it was pre-pandemic. Hopefully, the Fed pivot can swoop in before the resiliency buckles. In fact, the Fed is counting on it with their most recent projections showing trend GDP growth for this year and next at 2.0% and still-low unemployment as I shared in the second segment link above. Those projections also point to roughly 2.0% (PCE) inflation and a "neutral" Fed funds rate by the end of 2025 (roughly 3.5%) - all to say a very "normal" U.S. economy with no recession. Let's hope they are right.

Tatiana & Rebecca

Data-Driven Economic Strategies

MACROECONOMIC "BIG PICTURE" (PAGE 3)

Real Growth in GDP vs. Year Ago

Q2: 3.1%*
Q2: 3.0%**

*Estimate of real GDP percent change from same quarter a year ago, SA
**If quarterly changes were annualized over the year.
Source: U.S. Bureau of Economic Analysis
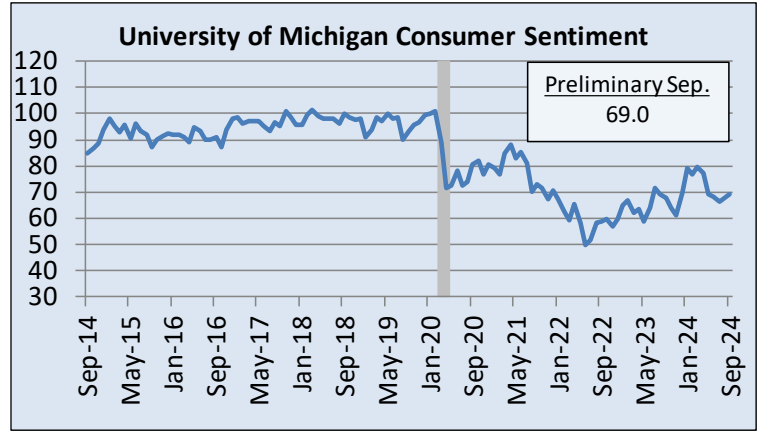
Forecasts for U.S. Real GDP and Unemployment (SA)

	2022 Actual	2023 Actual	2024 Forecast	2025 Forecast
Real GDP Growth	1.9%	2.5%	2.4%	1.9%
Unemployment Rate	3.6%	3.6%	4.1%	4.4%

Forecasts by Data-Driven Economic Strategies with input from the Conference Board, Wells Fargo, Colorado Department of Labor & Employment, and other anecdotal resources.
Sources: U.S. Bureau of Economic Analysis; U.S. Bureau of Labor Statistics

2021-22 Percent Change in Real GMP (chained 2017 dollars)

Colorado: 2.2%

- Austin: 7.4%
- Boise: 5.3%
- Boulder: 3.9%
- Colorado Springs: 1.0%
- Denver: 4.3%
- Huntsville: 3.7%
- Salt Lake City: 1.4%
- U.S. (Metro Portion): 2.1%

Note: Data includes military. Real GMP is adjusted for regional price parity (RPP). This regional data lags ~23 months.
Source: U.S. Bureau of Economic Analysis

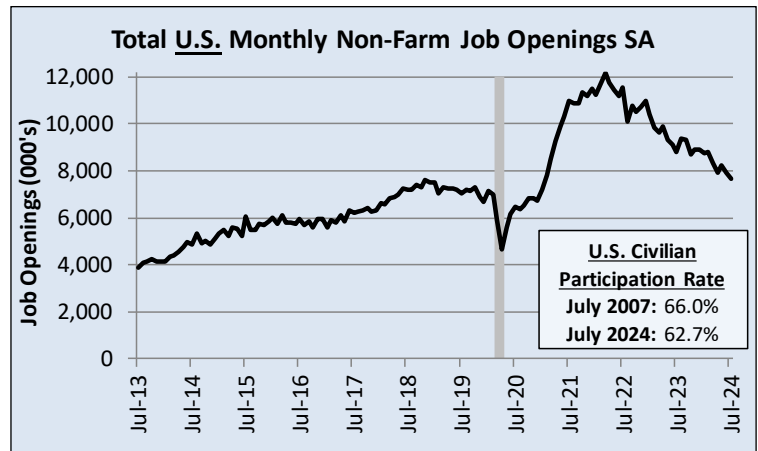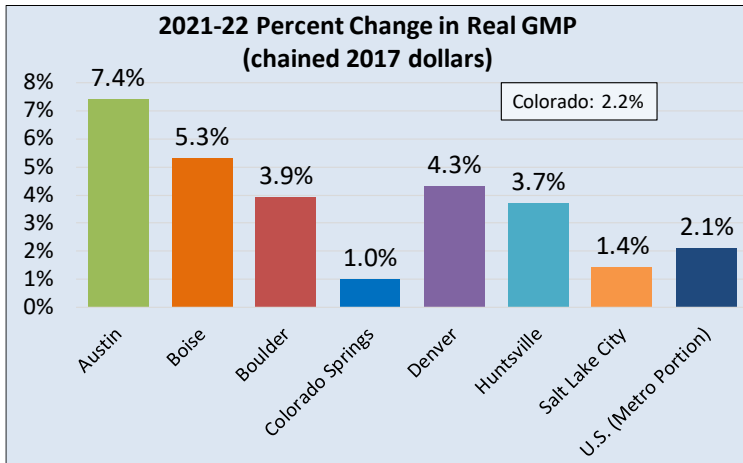### Monthly Unemployment Rate - Not Seasonally Adjusted

Aug. 2024
4.4% U.S.
4.3% CO
4.5% EPC

U.S. U-6*
8.0%

Note: Data in the graph is NSA to enable comparisons with counties.
*U-6 includes unemployed, those marginally attached to the labor force, plus those employed part time who would prefer full-time work.
Sources: U.S. Bureau of Labor Statistics; CO Dept. of Labor & Employment

University of Michigan Consumer Sentiment

Preliminary Sep. 69.0

Source: University of Michigan

Total U.S. Monthly Non-Farm Job Openings SA

U.S. Civilian Participation Rate
July 2007: 66.0%
July 2024: 62.7%

Source: U.S. Bureau of Labor Statistics; Job openings data lags.

U.S. Consumer Price Index - August 2024

	All items	Less food & energy
Change from July to August 2024 (SA)	0.2%	0.3%
Last 12-months (NSA)	2.5%	3.2%

The 2024 Q2 cost of living in the **Colorado Springs MSA** was **100.3%** of the U.S. according to C2ER data provided by the CS Chamber & EDC.
Source: U.S. Bureau of Labor Statistics; all urban consumers (CPI-U)

Monthly Interest Rates

Sep. 24, 2024*
- Prime **8.00**
- 30 Yr MR **6.09**
- Fed Funds **4.83**

*The latest monthly rate is the average expected as of the date in the text box. The text box reflects the latest interest rate changes.
Source: Board of Governors of the Federal Reserve System

Top Job Openings, Colorado Springs MSA August 2024

Top Job Titles	# of Job Postings	Median Advertised Salary
Retail Salespersons (M)	624	$33,920
Registered Nurses (L)	611	$92,416
Computer Sys Engineers/Architects (L)	437	$134,912
Software Developers (L)	434	$133,888
1st-Line Supervisors, Retail Sales (L)	339	$46,464
Customer Service Reps (M)	325	$41,600
Secretaries & Admin Assistants (M)	273	$44,928
Maintenance & Repair Workers (M)	249	$46,720
Food Service Managers (H)	229	$43,520
General & Operations Managers (L)	227	$70,016

Colorado Springs MSA, August 2024
TOTAL Job Openings: **19,449**
TOTAL Unemployed: **17,370**
Workers Available per Job Opening: **0.89**

Risk of Automation: L = Low; M = Medium; H = High
Sources: The Conference Board®–Lightcast® Help Wanted OnLine® via Pikes Peak Workforce Center; CO Dept. of Labor & Employment

2023 Federal Poverty Level (FPL)

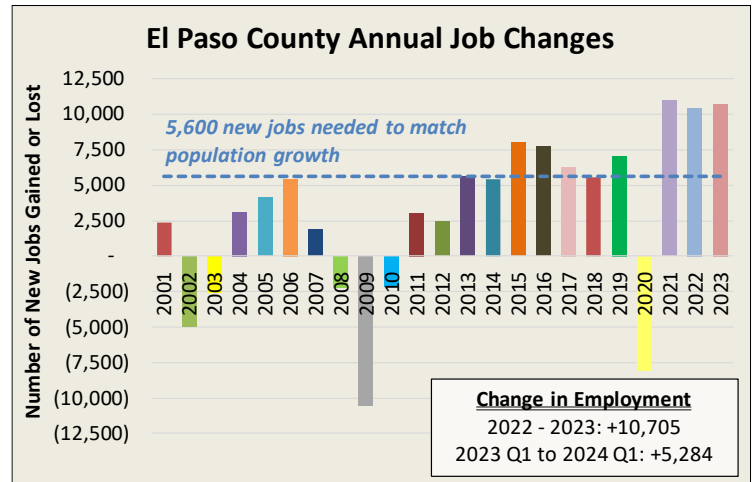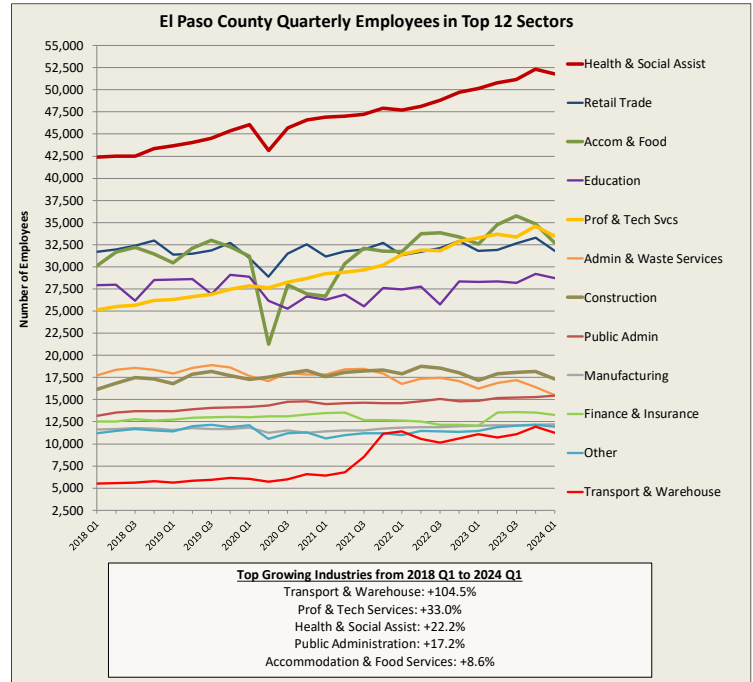|	El Paso County	U.S.
% people at FPL or below	7.0%	12.5%

Note: FPL in 2023 was $14,580 for an individual and $30,000 for a family of four.

2024 Q1 Average Annual Wages for All Industries

El Paso County wages are 14.1% lower than U.S. wages and 18.7% lower than CO wages.

U.S.	Colorado	El Paso County
$79,404	$83,876	$68,172
2024 Q1 El Paso County Total Employment*		303,649

2023-24 Minimum Wage & Living Wage El Paso County

	Wage/Hr	Annualized
Minimum wage salary for full-time worker	$14.42	$29,994
Living wage: HHs with 1 adult, 2 children	$56.05	$116,584
Living wage: HHs with 2 adults (1 working), 2 children	$43.68	$90,854
Living wage: HHs with 2 adults* (2 working), 2 children	$30.39	$63,211

Living wage is for each working adult. For specifics, go to livingwage.mit.edu.

*QCEW data does not include military-related employees.
Sources: U.S. Bureau of Labor Statistics and Colorado Department of Labor and Employment, QCEW; Local military installations; U.S. Census Bureau, American Community Survey 1-year estimates; U.S. Department of Health & Human Services; MIT Living Wage Calculator

El Paso County Quarterly Employees in Top 12 Sectors

Top Growing Industries from 2018 Q1 to 2024 Q1
Transport & Warehouse: +104.5%
Prof & Tech Services: +33.0%
Health & Social Assist: +22.2%
Public Administration: +17.2%
Accommodation & Food Services: +8.6%

El Paso County Annual Job Changes

5,600 new jobs needed to match population growth

Change in Employment
2022 - 2023: +10,705
2023 Q1 to 2024 Q1: +5,284

An estimated 5,600 new jobs are needed based upon population growth and age composition. This QCEW data lags up to three quarters and includes public and private employment, but not military-related employees.
Source: Colorado Dept. of Labor & Employment, Quarterly Census of Employment and Wages (QCEW)

Real GMP Contribution by Private Sectors, Colorado Springs MSA, 2022

Finance, Insurance, Real estate, Rental & Leasing (2021)	19.6%
Professional and Business services	16.9%
Health Care, Social Assistance & Education	8.3%
Retail trade	6.3%
Construction	6.0%
Information	4.3%
Accommodation & Food Services	4.0%
Other Services, Except Government	2.7%
Wholesale Trade	1.9%
Transportation and Warehousing	1.3%
Utilities (2020)	1.0%
Arts, Entertainment & Recreation	0.8%
Mining (2020)	0.5%

Total 2022 Real Gross Metropolitan Product (GMP) Including Government: $41.3 billion

Millions of dollars (inflation-adjusted to 2017)

Manufacturing data last disclosed in 2012 when it was 7.1% of real GMP. Government data is no longer released by sector for 2016 when federal military was 12.7%, state & local government was 8.2% and federal civilian government was 5.3% of real GMP. Utilities and Mining data last disclosed in 2020. Finance, insurance, real estate & leasing was last disclosed in 2021. GMP (local) data lags by approximately 23 months. GMP is the same as GDP for the nation but at the local level.
Source: U.S. Bureau of Economic Analysis

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Population Estimates

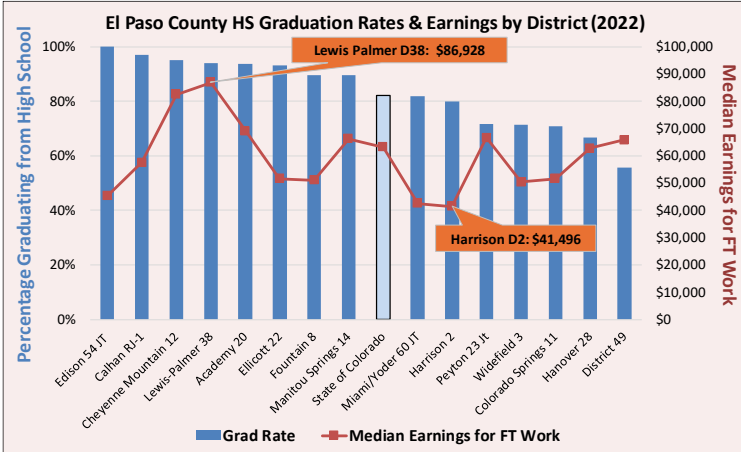|	2022	2050
El Paso County	740,552	1,008,489
Colorado	5,838,736	7,491,886

The **City of Colorado Springs** had a population of **485,143** in 2022.
Source: Colorado State Demography Office

El Paso County HS Graduation Rates & Earnings by District (2022)

Lewis Palmer D38: $86,928
Harrison D2: $41,496

Note: Calhan, Ellicott, Peyton, Hanover, Edison, and Miami/Yoder districts all have fewer than 100 students. District 49 has a significant number of online students, which pull down the districtwide average. (Without the largest online school, the district average is 88%.)
Sources: Colorado Department of Education; U.S. Census Bureau, American Community Survey 5-year estimates

Bachelor's Degree or Higher in 2023

15.3% / 44.8% / 13.4% / 36.2%

Colorado Springs (city) / Colorado / United States

Ages 18-24 / Ages 25+

Some College or Associate Degree in 2023

42.4% / 38.6% / 32.1% / 27.7%

Colorado Springs (city) / Colorado / United States

Ages 18-24 / Ages 25+

Source: U.S. Census Bureau, American Community Survey 1-year estimates

2023 Population by Age Group

2023 Median Age
EPC: 35.4
U.S.: 39.1

El Paso County / United States
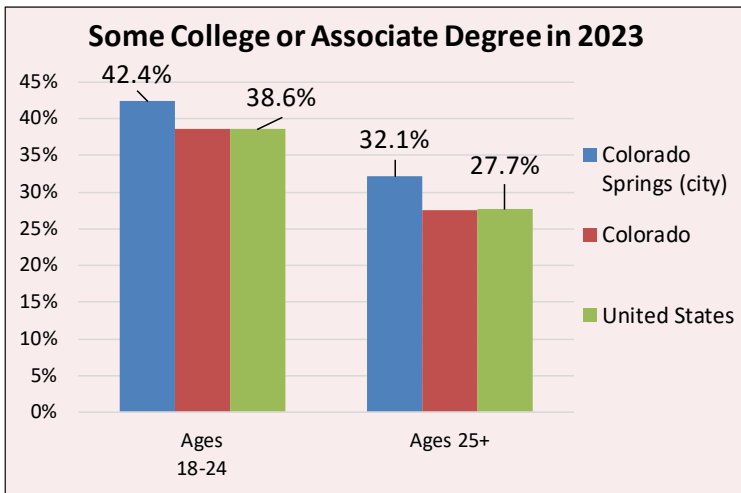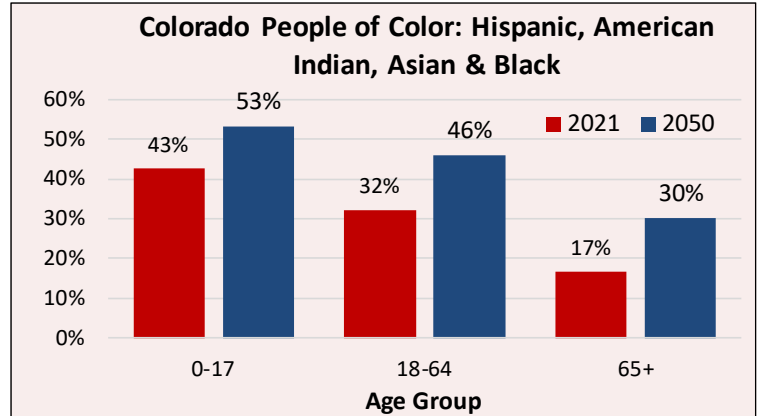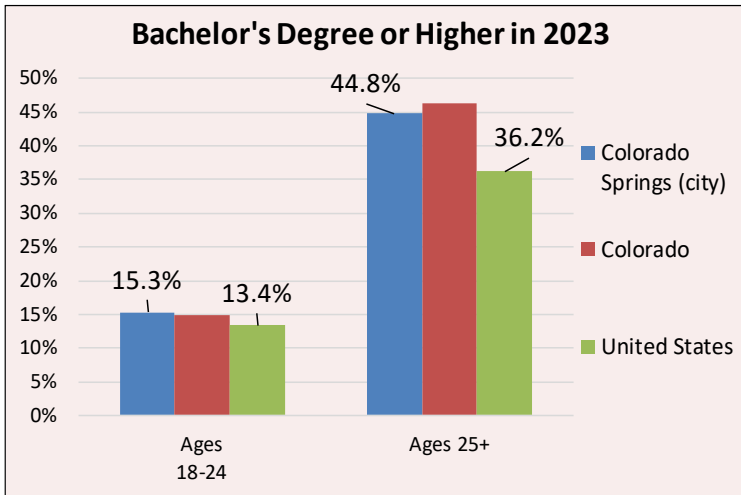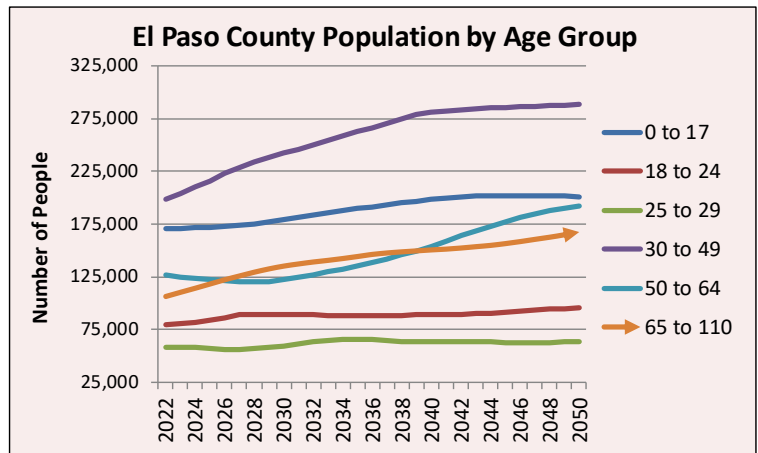
Ages 0-17, Ages 18-24, Ages 25-39, Ages 40-54, Ages 55-64, Ages 65+

Source: U.S. Census Bureau, Population Division

El Paso County Population by Age Group

0 to 17, 18 to 24, 25 to 29, 30 to 49, 50 to 64, 65 to 110

Colorado People of Color: Hispanic, American Indian, Asian & Black

2021 / 2050

Age Group	0-17	18-64	65+
2021	43%	32%	17%
2050	53%	46%	30%

Projected Population Change
2020 - 2050

Source: Colorado State Demography Office

Pikes Peak Region New & Existing Home Sales

Source: Pikes Peak REALTOR® Services Corp.

Pikes Peak Region Residential Building Permits

"Healthy" number of permits* per year: 8,500
Actual permits 2023: 5,033

■ Total Single-Family Dwellings ■ Total Multi-Family Dwellings
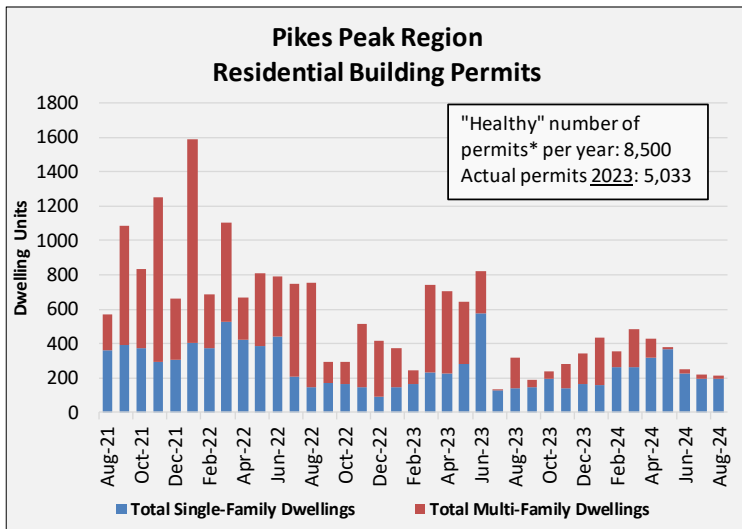
*The methodology for "healthy permits" now includes single-family and multi-family dwellings needed if we incorporate both population growth and the existing shortage of housing between 2023 and 2028. These calculations by Data-Driven Economic Strategies incorporate research by Common Sense Institute and input from the Colorado State Demography Office.
The National Association of REALTORS® has calculated that the U.S. has underbuilt roughly 6.5 million homes since the Great Recession.
Source: Pikes Peak Regional Building Department

Colorado Springs Quarterly Vacancy Rates & Rents

2024 Q2 Rents

Office
$25.88 per sq. ft.

Medical Office
$19.16 per sq. ft.

Retail
$18.54 per sq. ft.

Industrial
$10.44 per sq. ft.
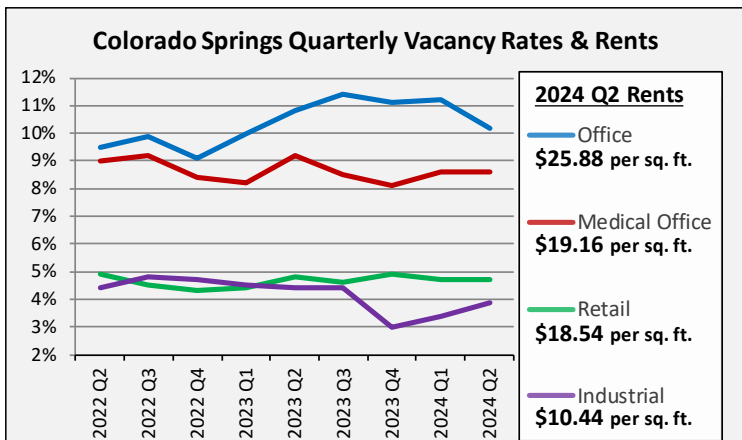
Sources: CoStar Group™; Olive Real Estate Group, Inc.

Median Existing Single-Family Home Price 2024 Q2

Location	Colorado Springs	Denver	Boise	United States
Price	$479,600	$669,900	$510,700	$422,100
1-year % Change	2.7% increase	0.7% decrease	6.2% increase	4.9% increase
MSA Rank	45	20	36	n/a

Sources: National Association of REALTORS®

2024 Q2 Cost of Housing Index for Existing Homes
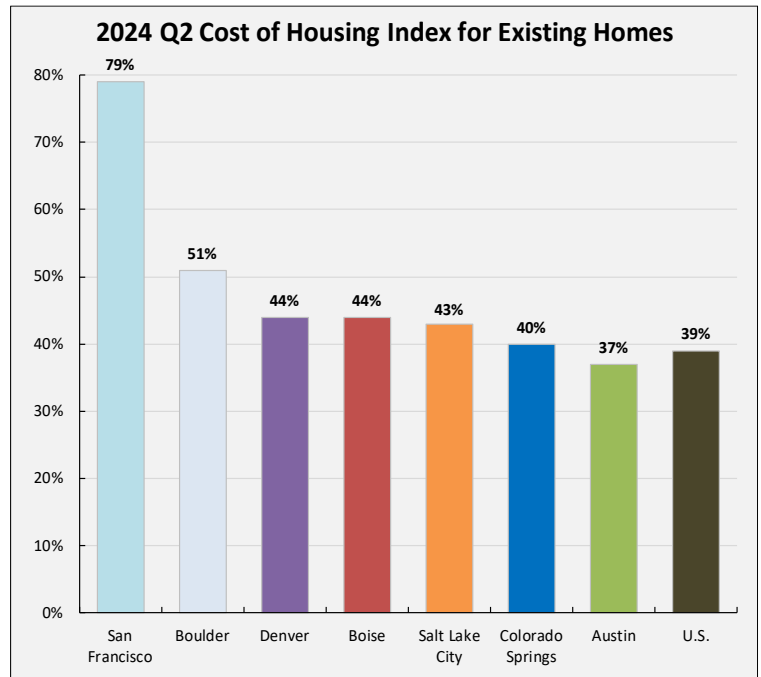
Notes: The Cost of Housing Index (CHI) is defined as the percentage of the local median pre-tax income needed for mortgage payments, based on standard mortgage underwriting criteria. It includes only existing home prices.
Sources: National Association of Home Builders; Wells Fargo

Apartment Rental Information

	Colorado Springs	Denver	Salt Lake City
Market Conditions 2024 Q2	Soft	Soft	Soft
Vacancy Rate 2023 Q2	11.8%	7.5%	10.6%
Vacancy Rate 2024 Q2	12.2%	9.7%	10.9%
Average Rent 2023 Q2	$1,500	$1,871	$1,607
Average Rent 2024 Q2	$1,490	$1,883	$1,597

Source: U.S. Department of Housing & Urban Development (HUD), U.S. Market Conditions report

TAXATION, VEHICLE SALES, AIR QUALITY, AND TOURISM (PAGE 7)
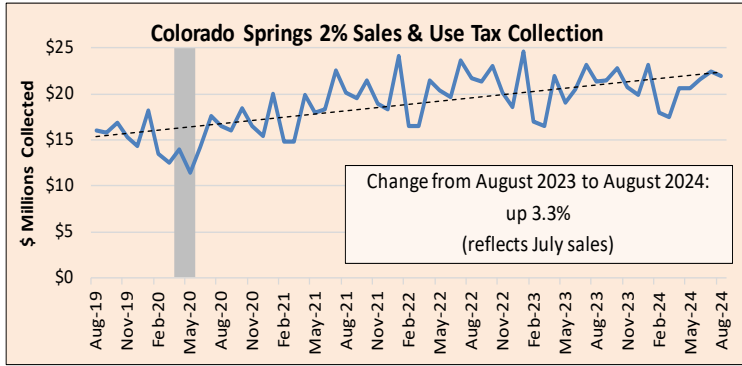
Colorado Springs 2% Sales & Use Tax Collection

Change from August 2023 to August 2024:
up 3.3%
(reflects July sales)

Source: City of Colorado Springs

Colorado Springs Airport Enplanements

Recession — 12 Month Moving Average

July 2023 to July 2024
8.5% Increase

Source: Colorado Springs Airport

Total U.S. New Vehicle Sales

Aug. 2023 to Aug. 2024: down 1.3%

Source: U.S. Bureau of Economic Analysis

Tourism Spending, El Paso County

Total Direct Employment:
18,800 workers (+7.9% from 2022)

2023 Total Direct Tax Receipts:
$144.2m (+7.1% from 2022)

$2.2b
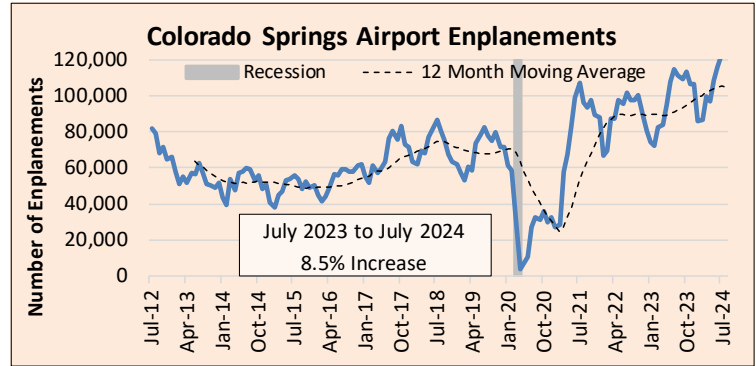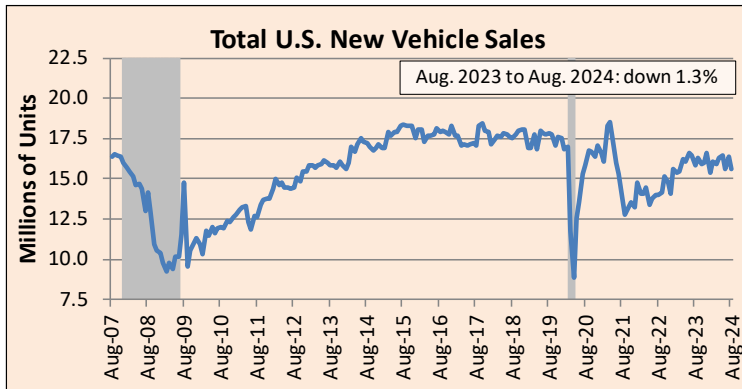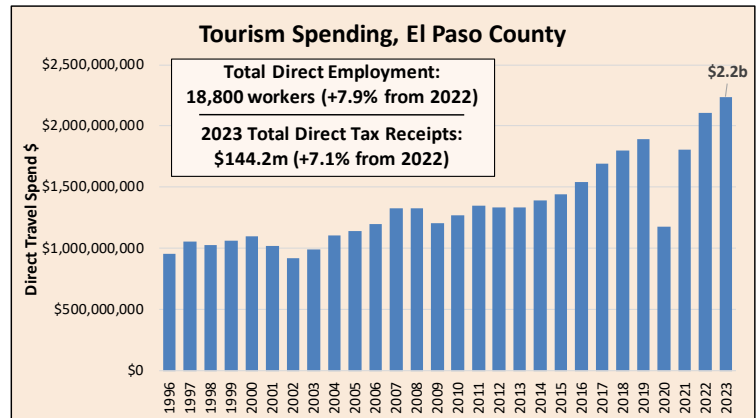
Note: Direct travel includes day and overnight visitors.
Source: Colorado Tourism Office

2023 Air Quality	Colorado Springs*	U.S. Standard
Carbon Monoxide (CO) Concentration (ppm)	1.1	9.0
Particulate Matter (µg/m³)	7.75	12.00
Ozone (ppm) at USAFA	*0.069*	0.070
Ozone (ppm) at Manitou Springs	*0.071*	0.070
Sulfur Dioxide (SO₂) (ppb)	4.8	75.0

*Locations of measurements: CO at 690 W. Hwy 24; Particulate Matter at Colorado College; SO₂ at Hwy 24
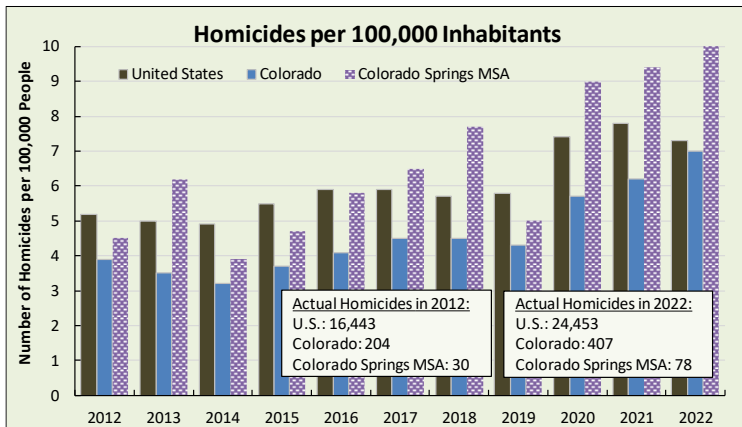
Source: Colorado Department of Public Health & Environment

Hotel Occupancy Rate August 2024	
Colorado Springs	Denver
75.8%	78.8%

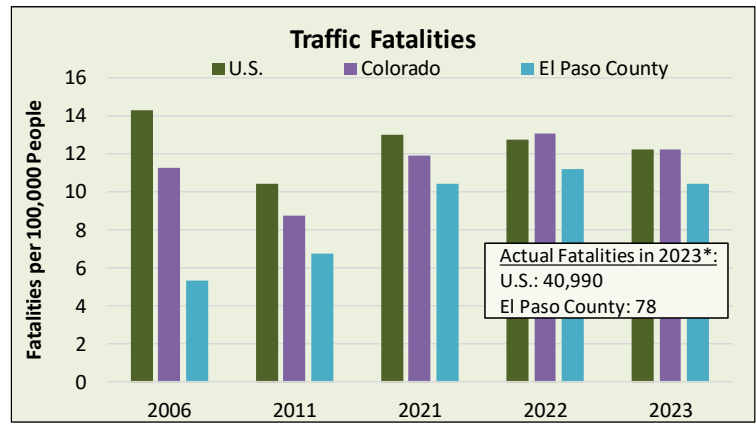| Hotel RevPAR* August 2024	
Colorado Springs	Denver
$125.51	$132.30

*RevPAR measures hotel revenue by taking the average room rate times hotel occupancy.
Source: CoStar Group™; Olive Real Estate Group, Inc.

CRIME & SAFETY (PAGE 7)

Homicides per 100,000 Inhabitants

United States, Colorado, Colorado Springs MSA

Actual Homicides in 2012:
U.S.: 16,443
Colorado: 204
Colorado Springs MSA: 30

Actual Homicides in 2022:
U.S.: 24,453
Colorado: 407
Colorado Springs MSA: 78

Source: United States Department of Health and Human Services, Centers for Disease Control and Prevention, National Center for Health Statistics, Underlying Cause of Death on CDC WONDER online Database.

Traffic Fatalities

U.S., Colorado, El Paso County

Actual Fatalities in 2023*:
U.S.: 40,990
El Paso County: 78

Sources: National Highway Safety Administration; Colorado Department of Transportation; World Bank; U.S. Census Bureau; Colorado State Demography Offices; Data-Driven Economic Strategies

2021 Mortality Rates due to Homicide per 100,000 Population				
Canada	Germany	Italy	Japan	United States
2.1	0.8	0.5	0.2	6.8

Source: UN Office on Drug and Crime's International Homicide Statistics database through The World Bank and World Population Review

Note: "Each year when Crime in the United States is published, some entities use reported figures to compile rankings of cities and counties. These rough rankings provide no insight into the numerous variables that mold crime in a particular town, city, county, state, or region. Consequently, they lead to simplistic and/or incomplete analyses that often create misleading perceptions adversely affecting communities and their residents. Valid assessments are possible only with careful study and analysis of the range of unique conditions affecting each local law enforcement jurisdiction. The data user is, therefore, cautioned against comparing statistical data of individual reporting units from cities, metropolitan areas, states, or colleges or universities solely on the basis of their population coverage or student enrollment."
- Federal Bureau of Investigation

Sworn Police Officers Per 10,000 Inhabitants in 2023	
City of Colorado Springs	15.8
City of Boise	12.4
Kansas City	21.4
City of Omaha	16.9

Sources: Federal Bureau of Investigation, Uniform Crime Report; U.S. Census Bureau, Population Division

SUPPORTERS (PAGE 8)

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THANK YOU!

Data updated on 9/24/2024.
Contact Rebecca Wilder at rwilder@ddestrategies.org.