The background of the slide is a photograph of the Columbia, South Carolina skyline at sunset. The sky transitions from a pale blue at the top to a warm orange and yellow near the horizon. Silhouettes of various buildings, including a prominent domed structure on the left and a tall spire, are visible against the bright horizon. A large tree is silhouetted on the right side of the frame.

City of Columbia Council Retreat 2009

Session III

**Population, demographic, workforce
and employment study**

Community Policy Analysis Center (CPAC)

Community Comparison

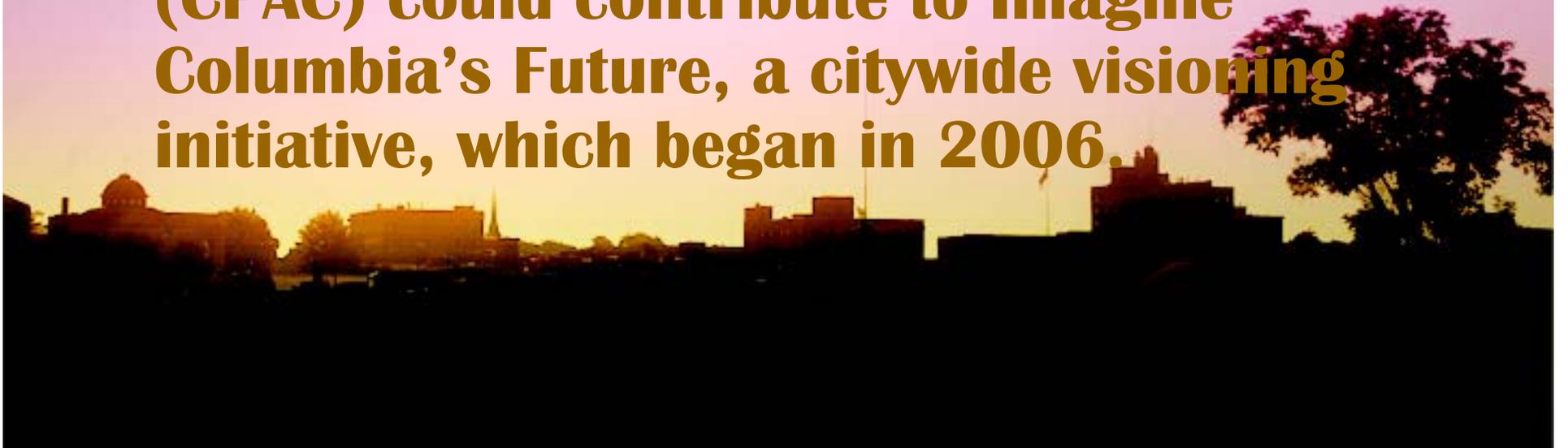
Compares the Columbia MSA to 25 peer U.S. communities in regard to:

- **Economic Performance Indicators**
- **Sectoral Performance Indicators**
- **Shift Share**
- **Location Quotient**



History

On April 13, 2007, representatives from the City of Columbia met with representatives from Community Policy Analysis Center and the Office of Social and Economic Data Analysis from the University of Missouri to discuss ways that the Community Policy Analysis Center (CPAC) could contribute to Imagine Columbia's Future, a citywide visioning initiative, which began in 2006.



History

Partnering with UMC, the City of Columbia contracted with CPAC to complete a baseline study and scenario to compliment the Imagine Columbia project.

- **Baseline Study**
- **Scenario Analysis**



Community Advisory Committee

Members

Bill Elder – UMC Office of Social & Economic Data Analysis

Steve Erdel – Boone County National Bank

Tom Henderson – UMC

David Keller – Bank of Missouri

Don Laird – Chamber of Commerce

Ben Londeree

Carol Van Gorp – Columbia Board of Realtors

Rob Wolverton – R. Anthony Development Group

Thad Yonke – Boone County P&Z

- **Met five times in 2008**



Community Baseline Process

4 Key Variables (assumptions) set by Advisory Panel to determine forecasts.

Forecasted Variables depend upon the assumptions (or 4 Key variable growth rates)

**Employment Growth Rate
(1.9% per year)**

**External Employment Growth Rate
(1.1% per year)**

**Per Capita Personal Income Growth Rate
(1.5 % per year)**

**External Labor Force Growth Rate
(0.5% per year)**

Population

Labor force

Commuting

Poverty

Unemployment

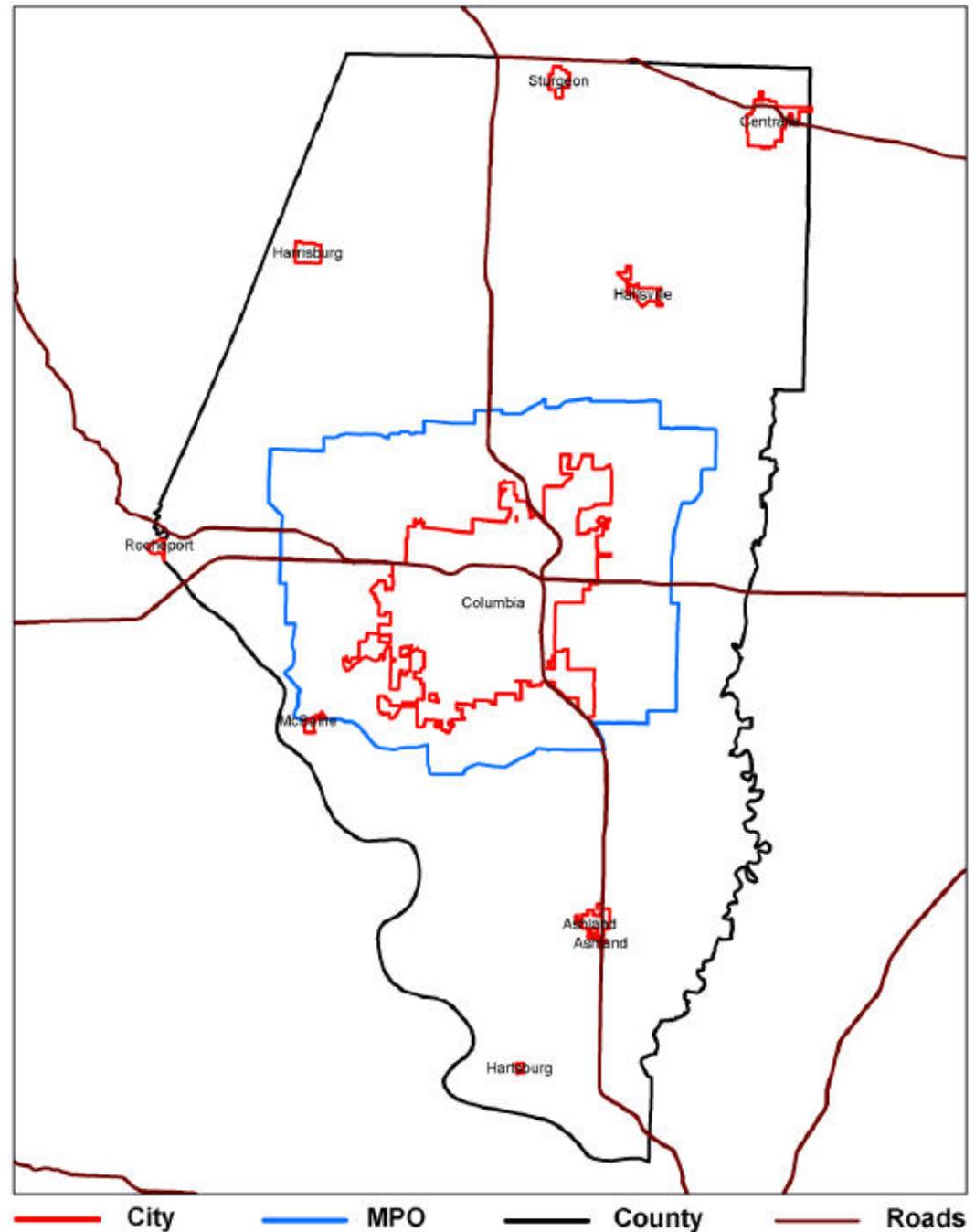
Retail sales

Local government revenues

Local government expenditures

Housing / property value

Boundaries

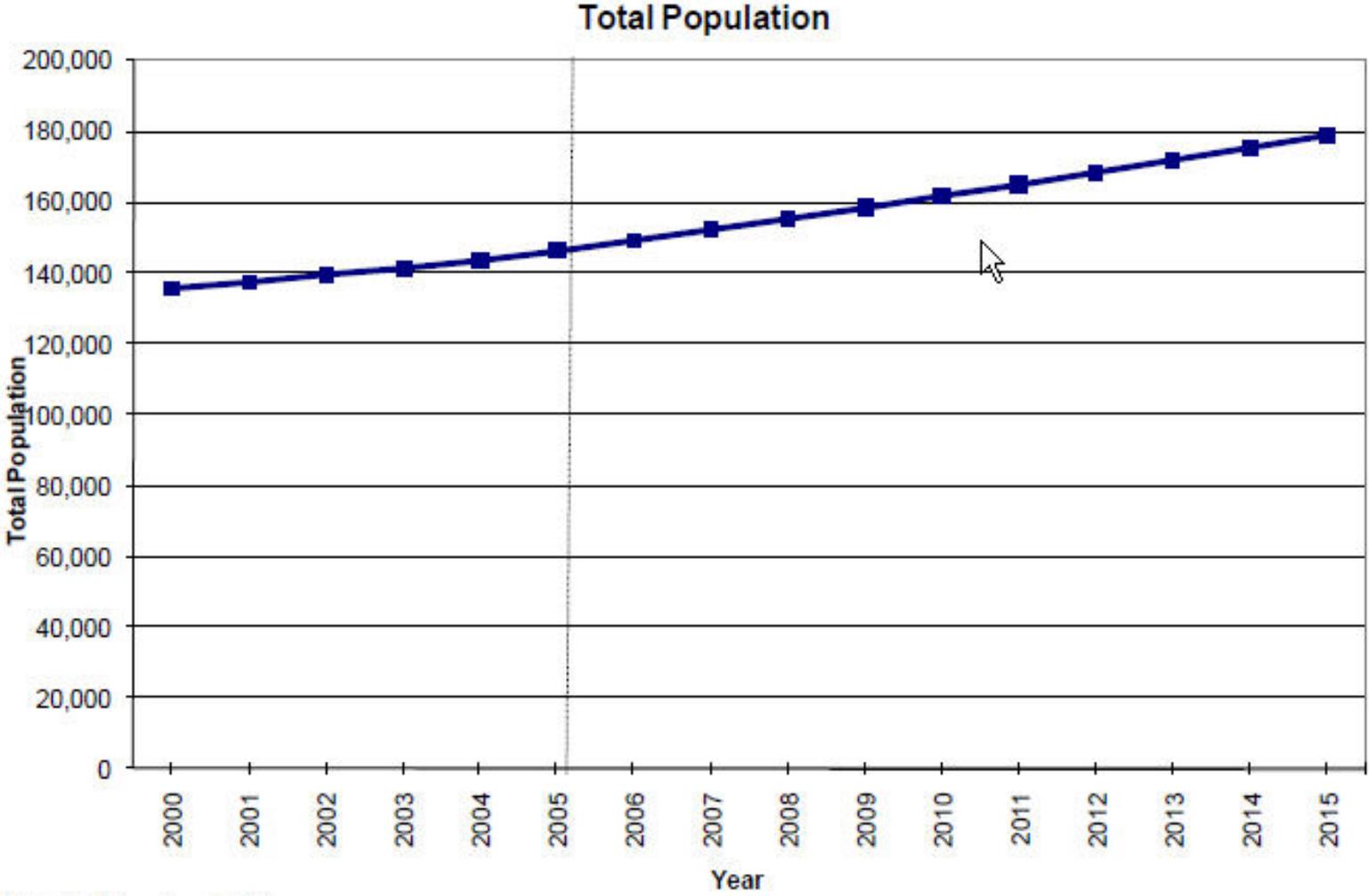


Source: US Census Bureau, Cartographic Boundary Files, 2000.
University of Missouri Extension, Office of Social and Economic Data Analysis, Generated 10.14.08

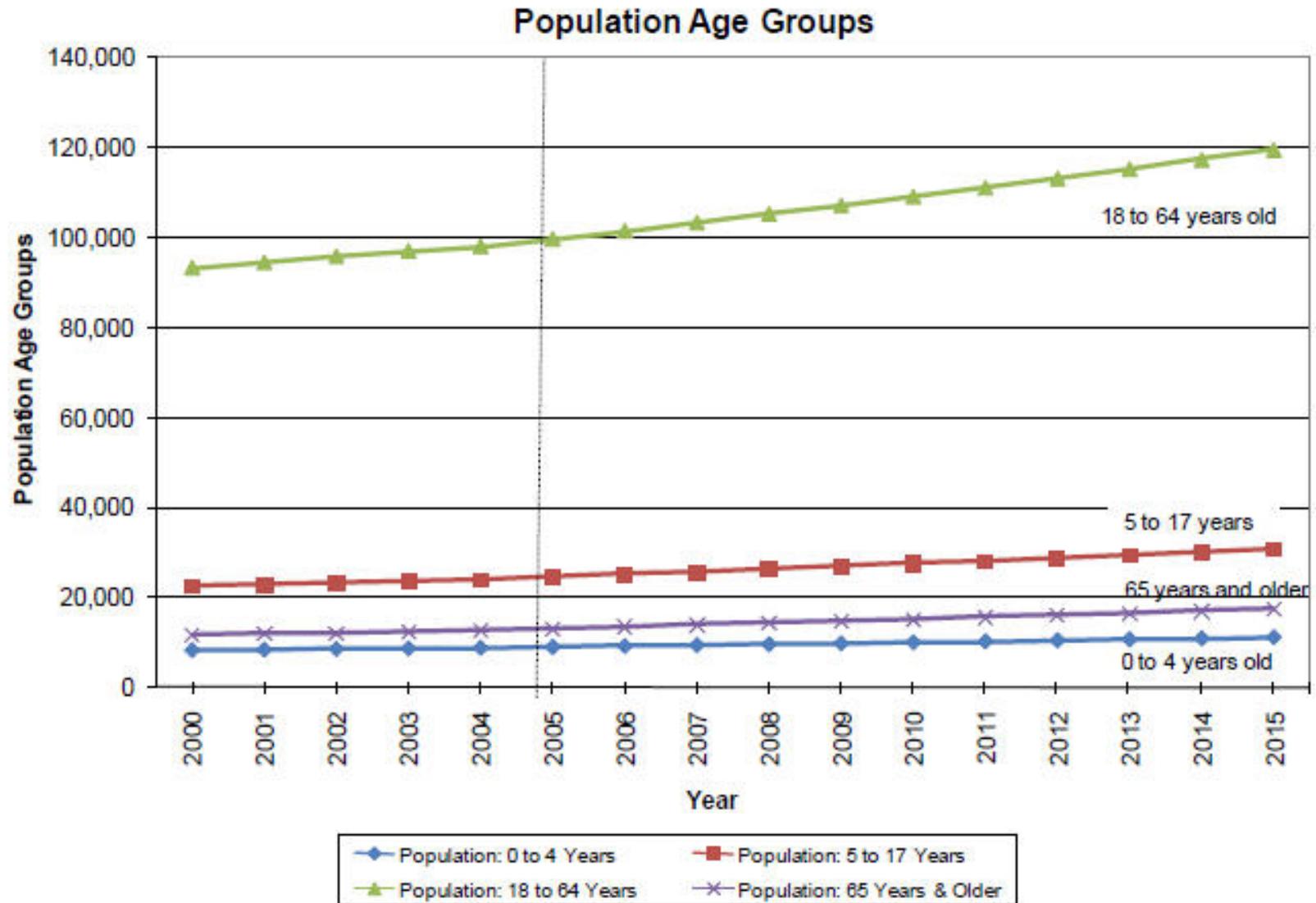
Boone Co. & MO Growth Rates

| Variable | 1995-2005 10-year | | 2000-2005 5-year | | 2003-2005 2-year | | Average (of 10-yr, 5-yr, 2-yr averages) | | Rates Chosen on 4/14/08 |
|----------------------------|----------------------|-----|---------------------|-----|---------------------|-----|--------------------------------------------|-----|-------------------------|
| | Boone | MO | Boone | MO | Boone | MO | Boone | MO | Boone |
| Per Capita Personal Income | 1.5 | 1.5 | 0.8 | 0.5 | 3.0 | 1.7 | 1.8 | 1.2 | 1.5 |
| Employment | 1.9 | 1.1 | 1.5 | 0.5 | 2.9 | 1.4 | 2.1 | 1.0 | 1.9 |
| External Employment | 1.4 | X | 0.7 | X | 1.1 | X | 1.1 | X | 1.1 |
| External Labor Force | 0.9 | X | 0.3 | X | 0.1 | X | 0.4 | X | 0.5 |

Boone County Population Projection

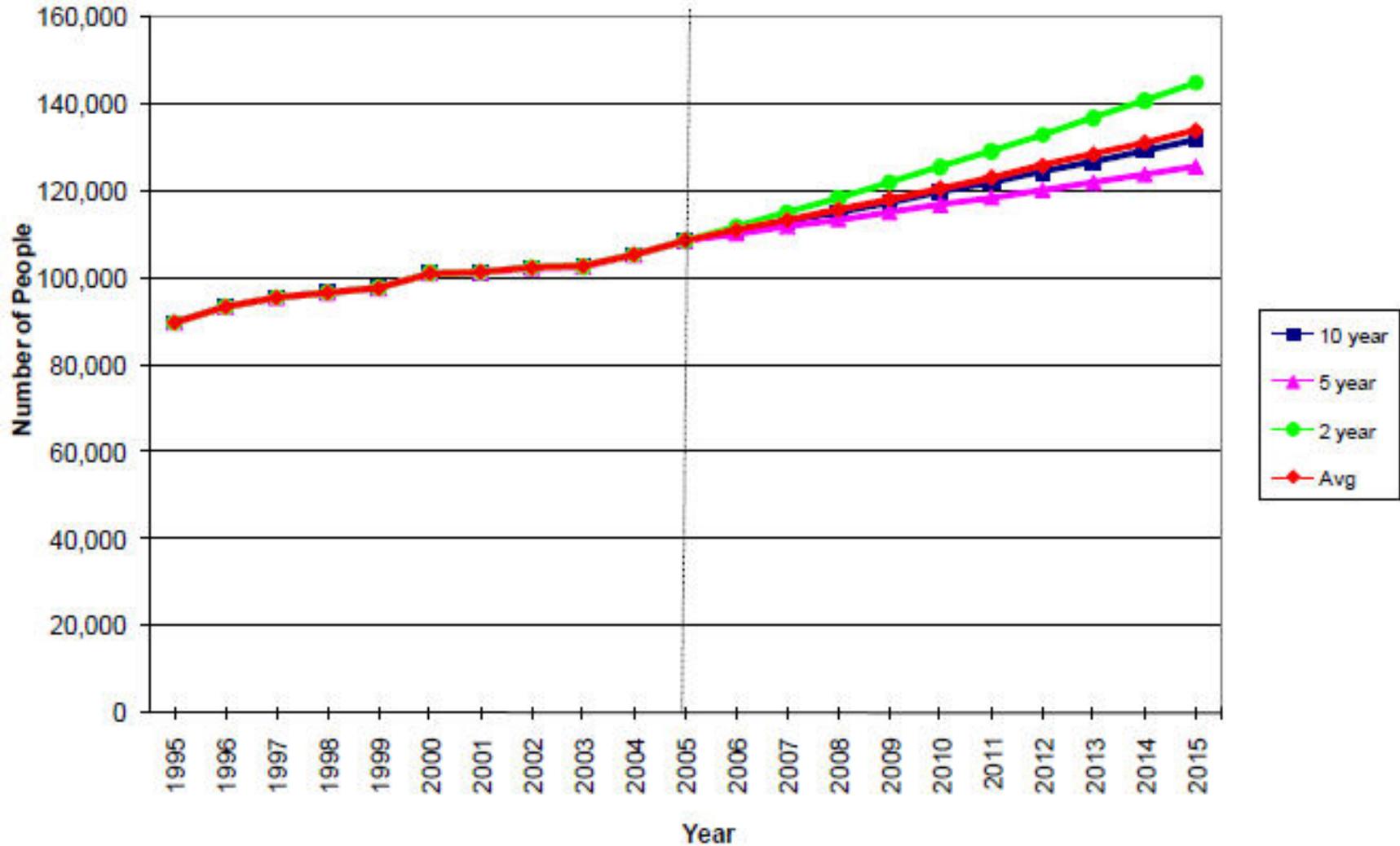


Projections by Age

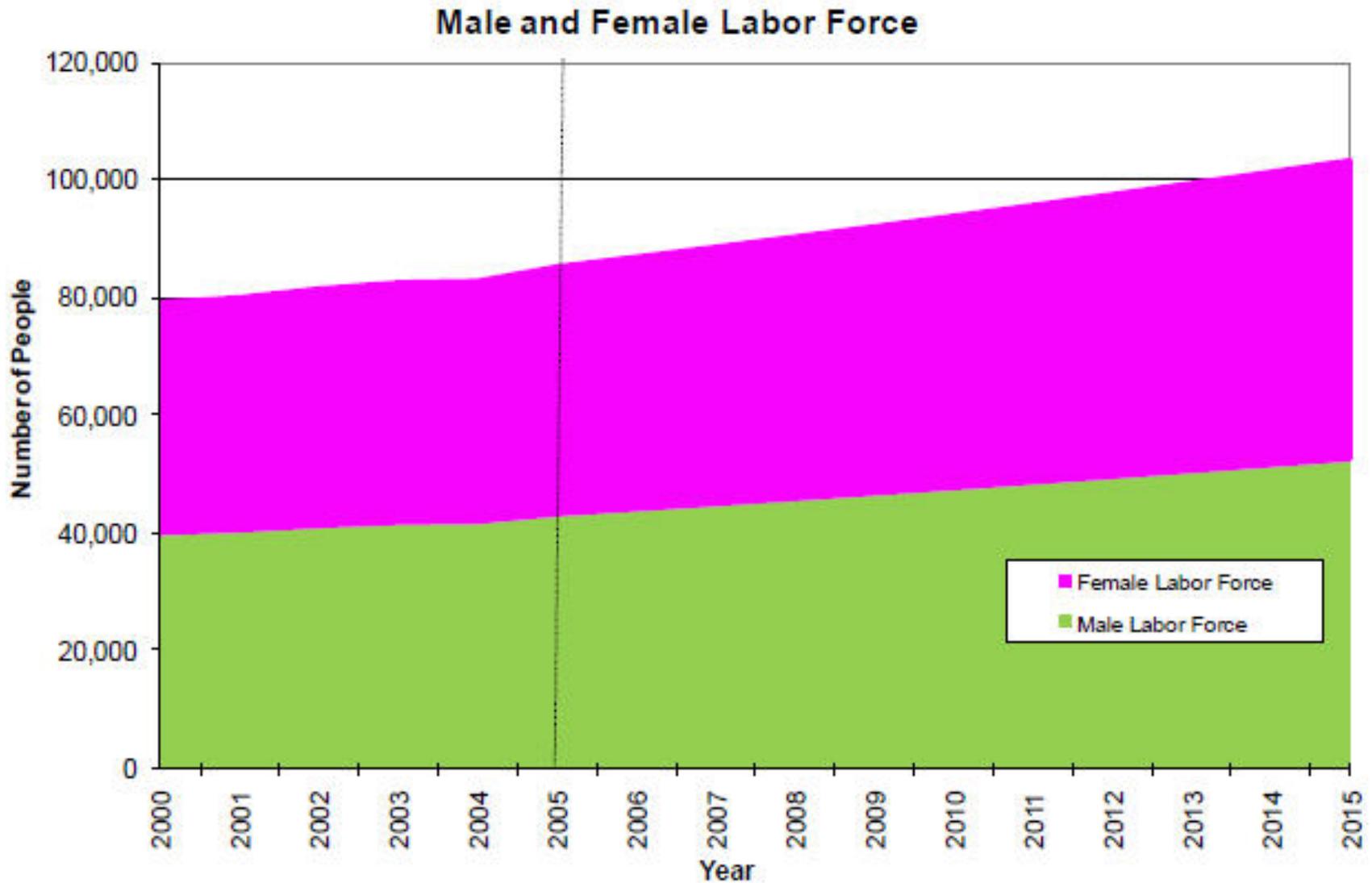


Four Alternative Boone County Employment Projections

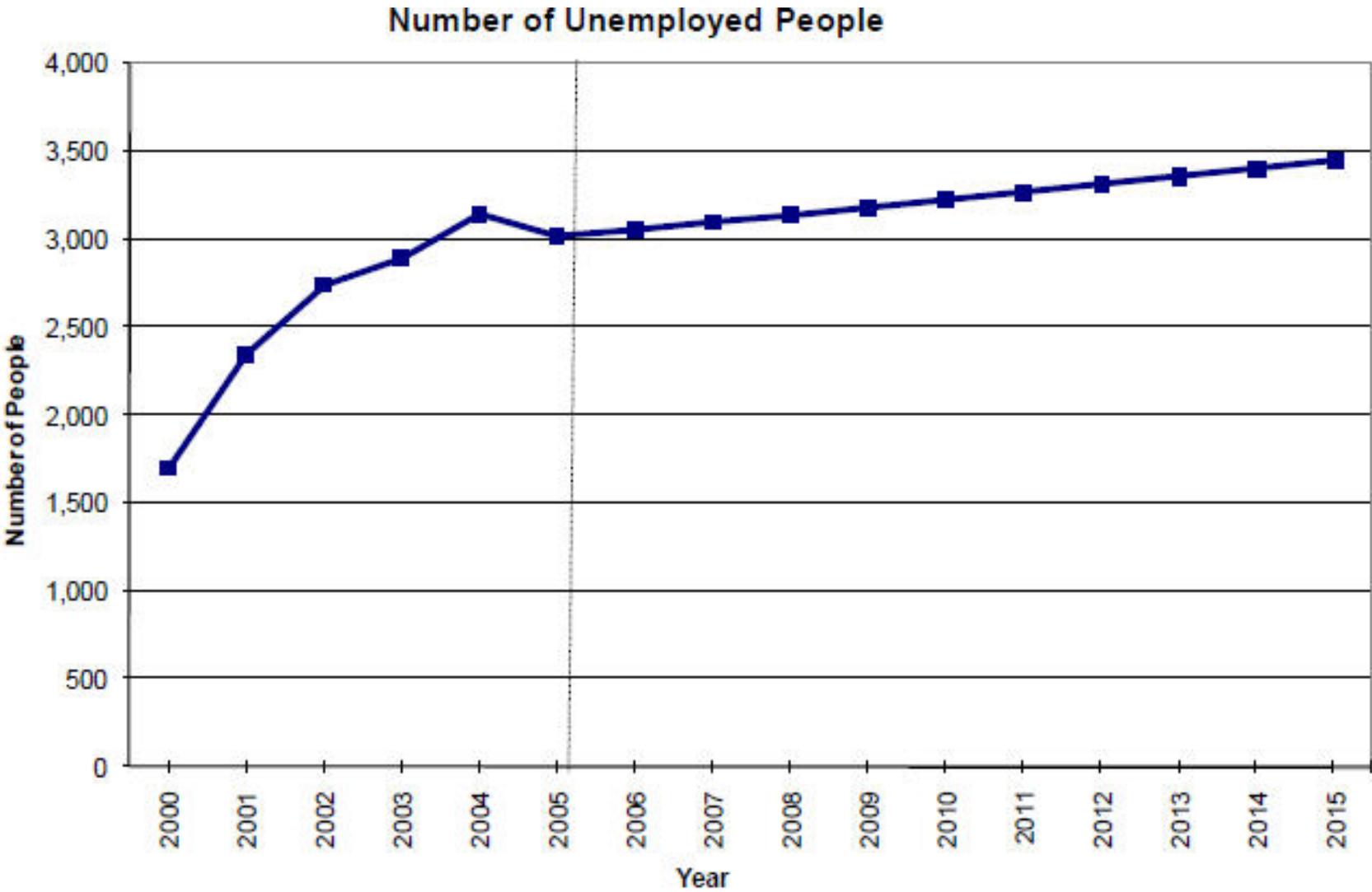
Total Employment



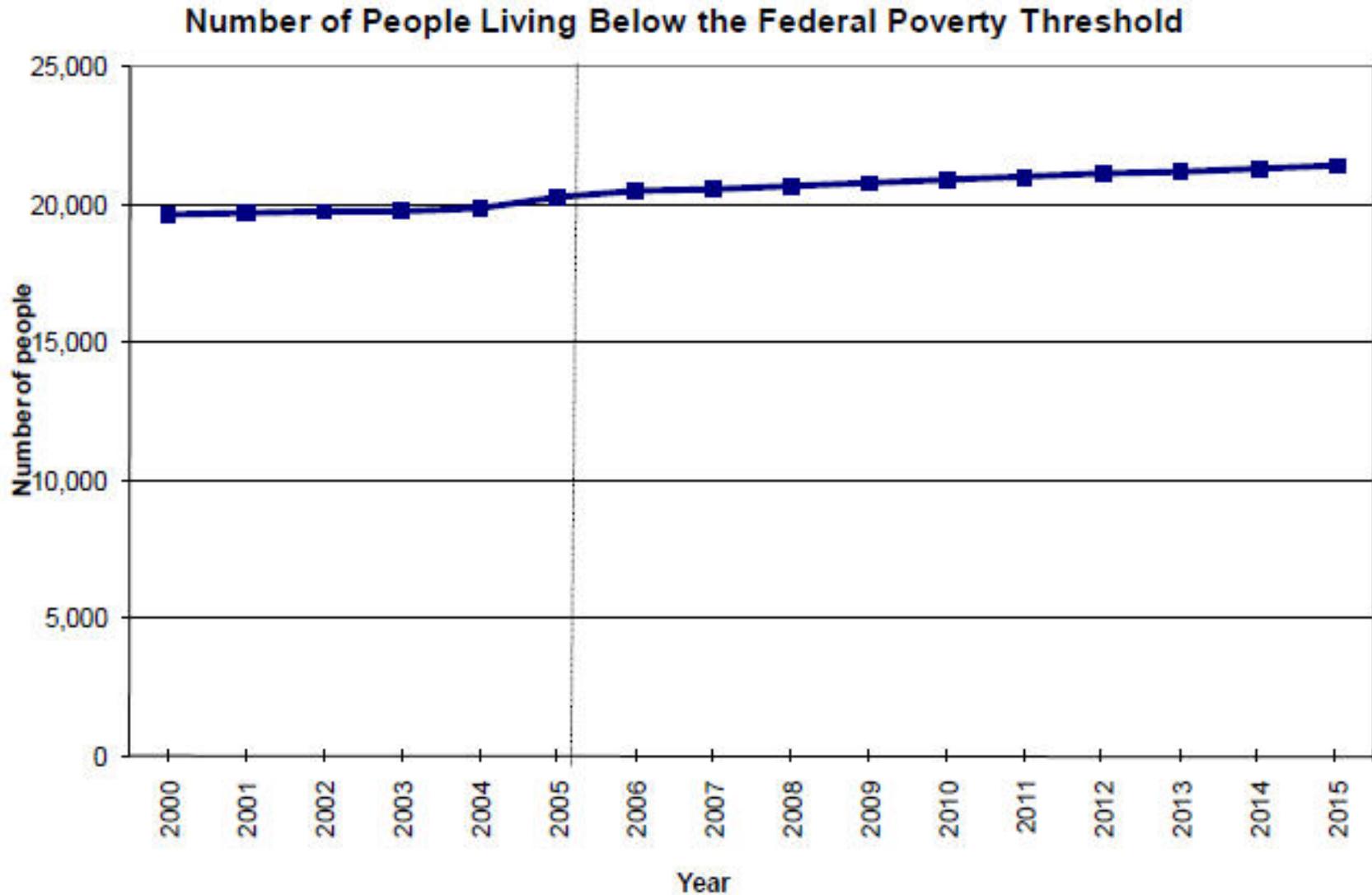
Labor Force Projections



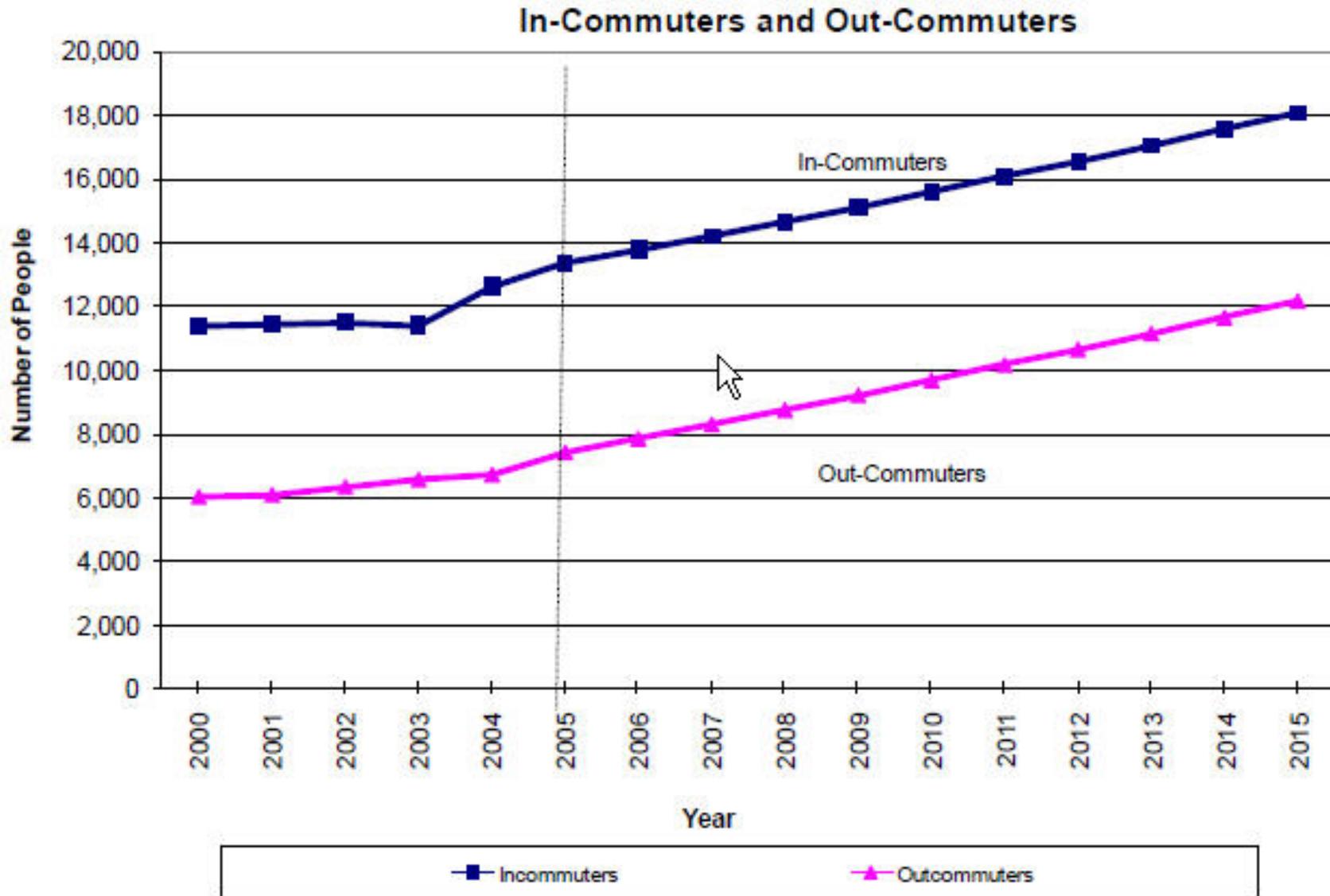
Number of Unemployed People



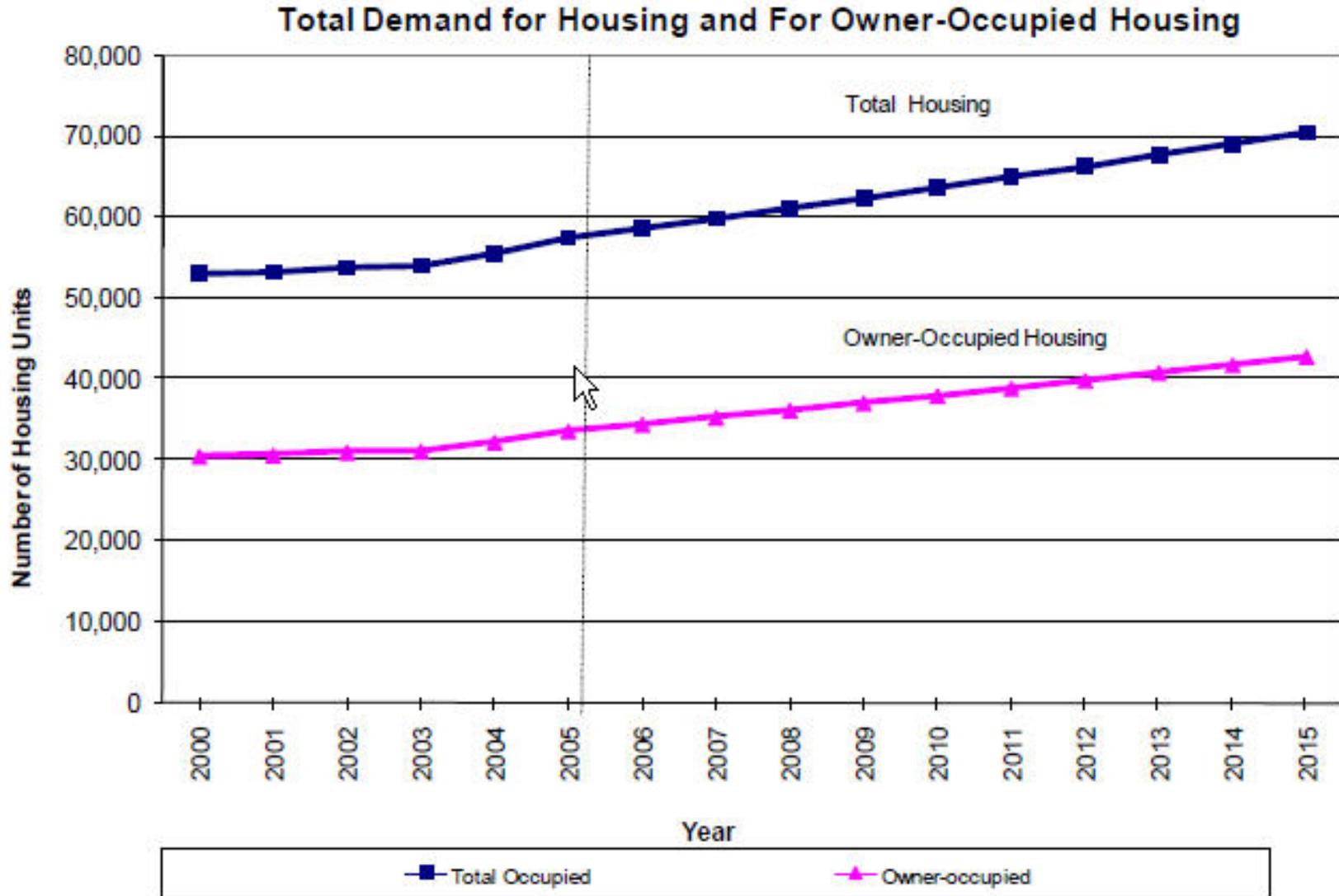
Federal Poverty Threshold



Commuting Projection

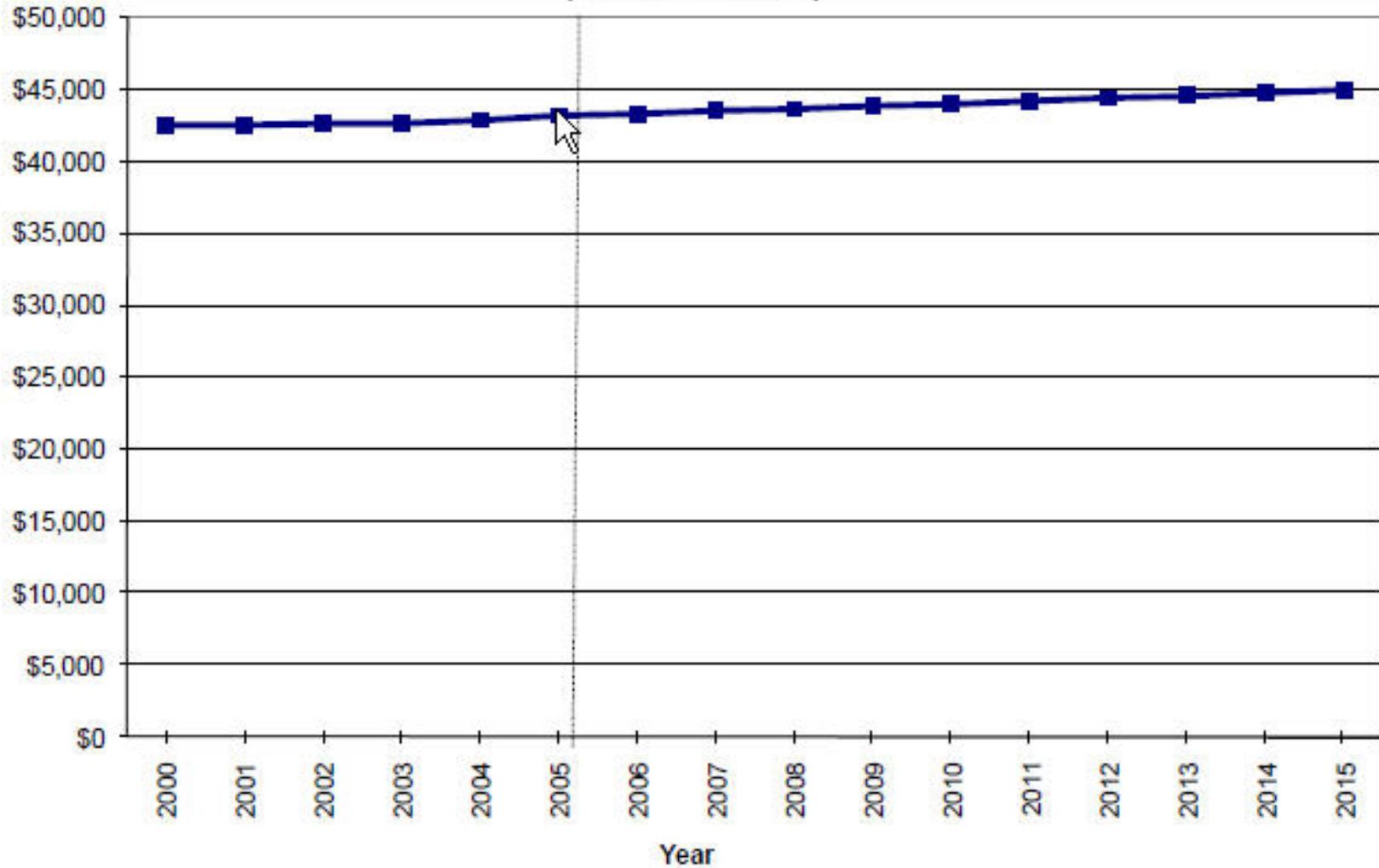


Housing Demand

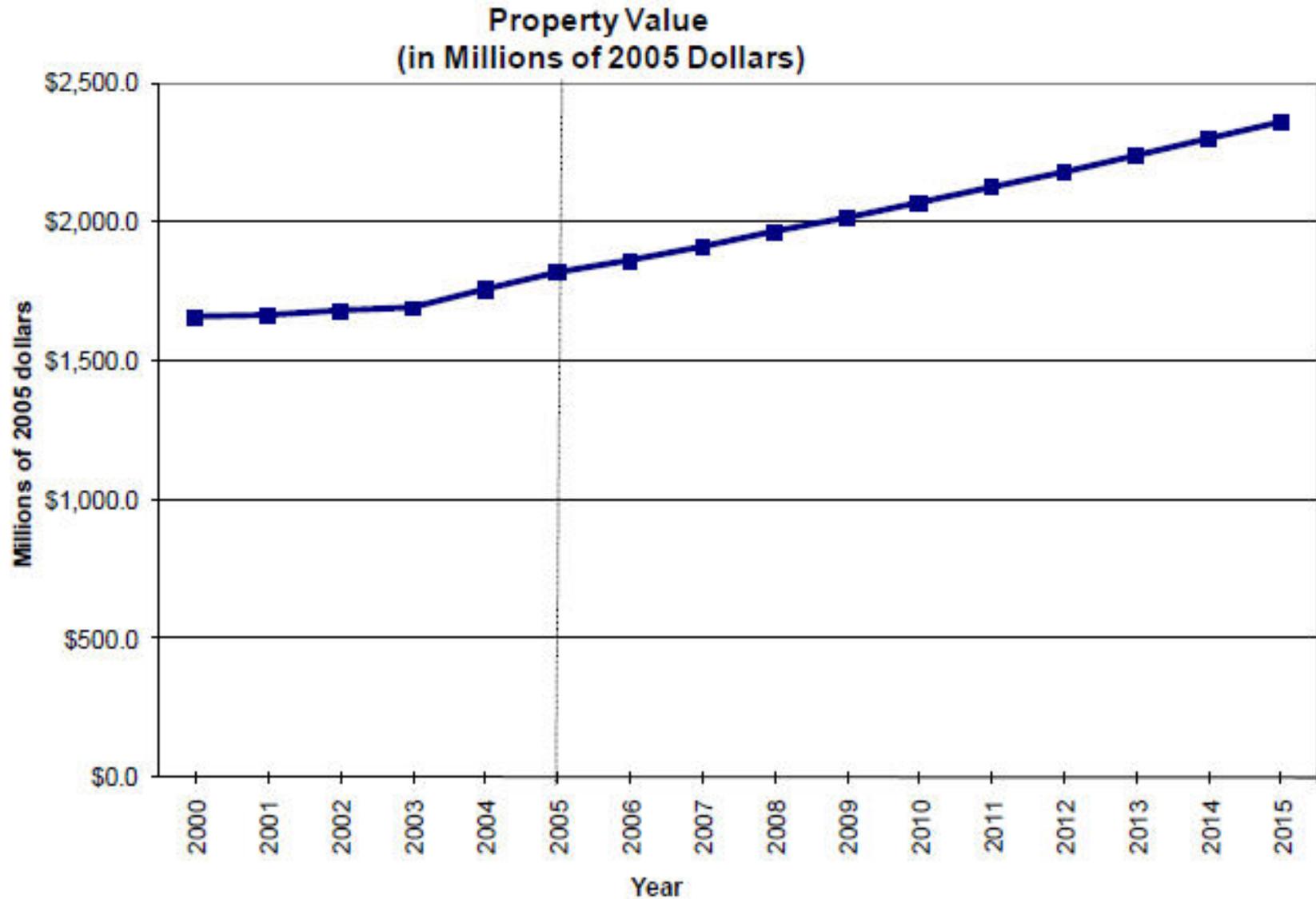


Median Household Income

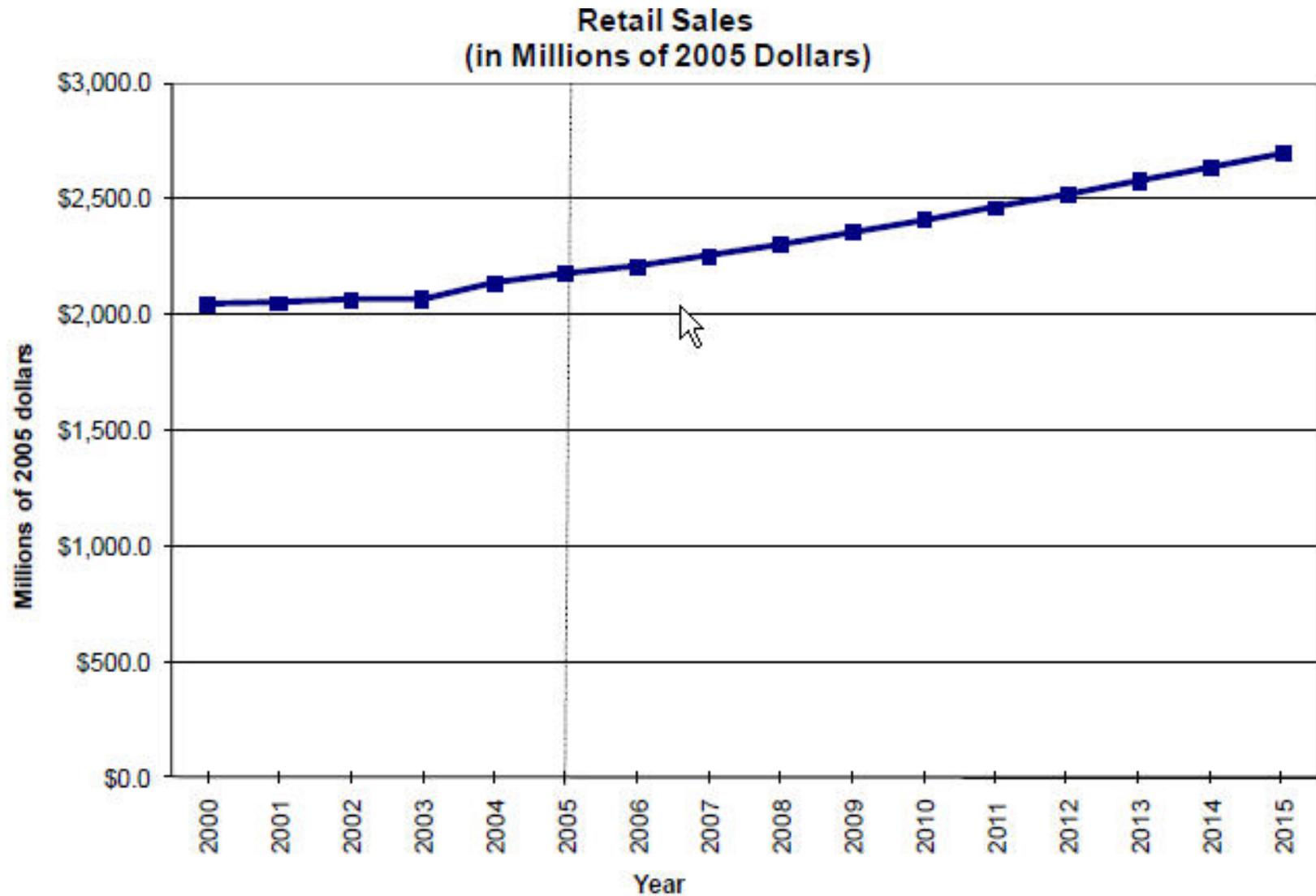
Median Household Income
(in 2005 Dollars)



Property Value Projection



Taxable Retail Sales



Scenario Study

Use the “Show-Me Model” to project likely outcomes of cluster development in the MPO Region in the following sectors:

- 1. University of Missouri**
- 2. Medical**
- 3. Insurance**
- 4. Retail**
- 5. Manufacturing**
- 6. Technology**
- 7. Retirees**

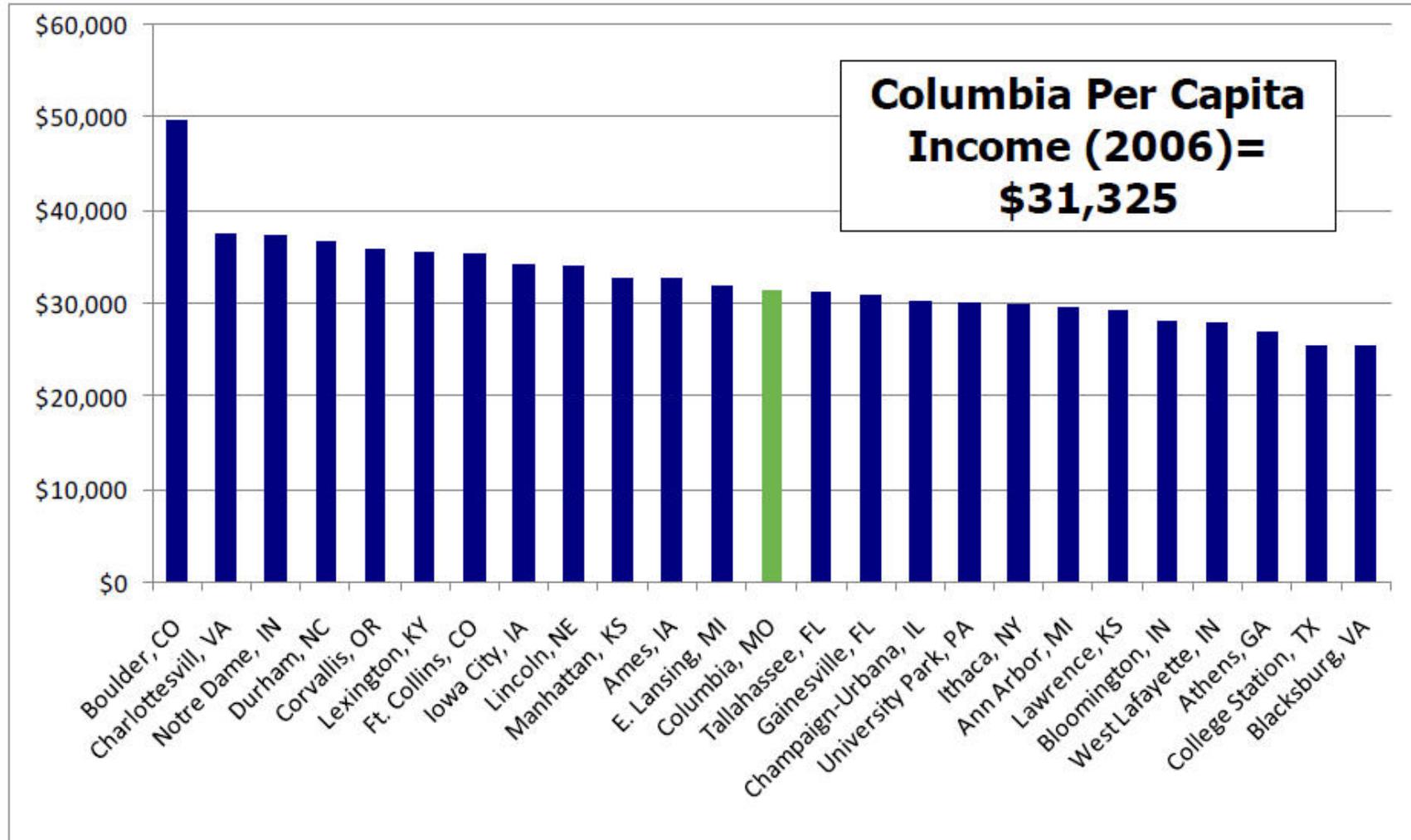
Scenario Study Design*

- **Analysis of 25 Peer Communities**
 - MSAs with fewer than 500,000 people
 - Research University – Very High
- **Comparison of Peer Communities**
 - Economic Performance Indicators
 - Sectoral Performance Indicators: Employment
 - Shift Share
 - Location Quotient

***Final report including baseline projections compared to scenarios complete by end of June, 2009.**

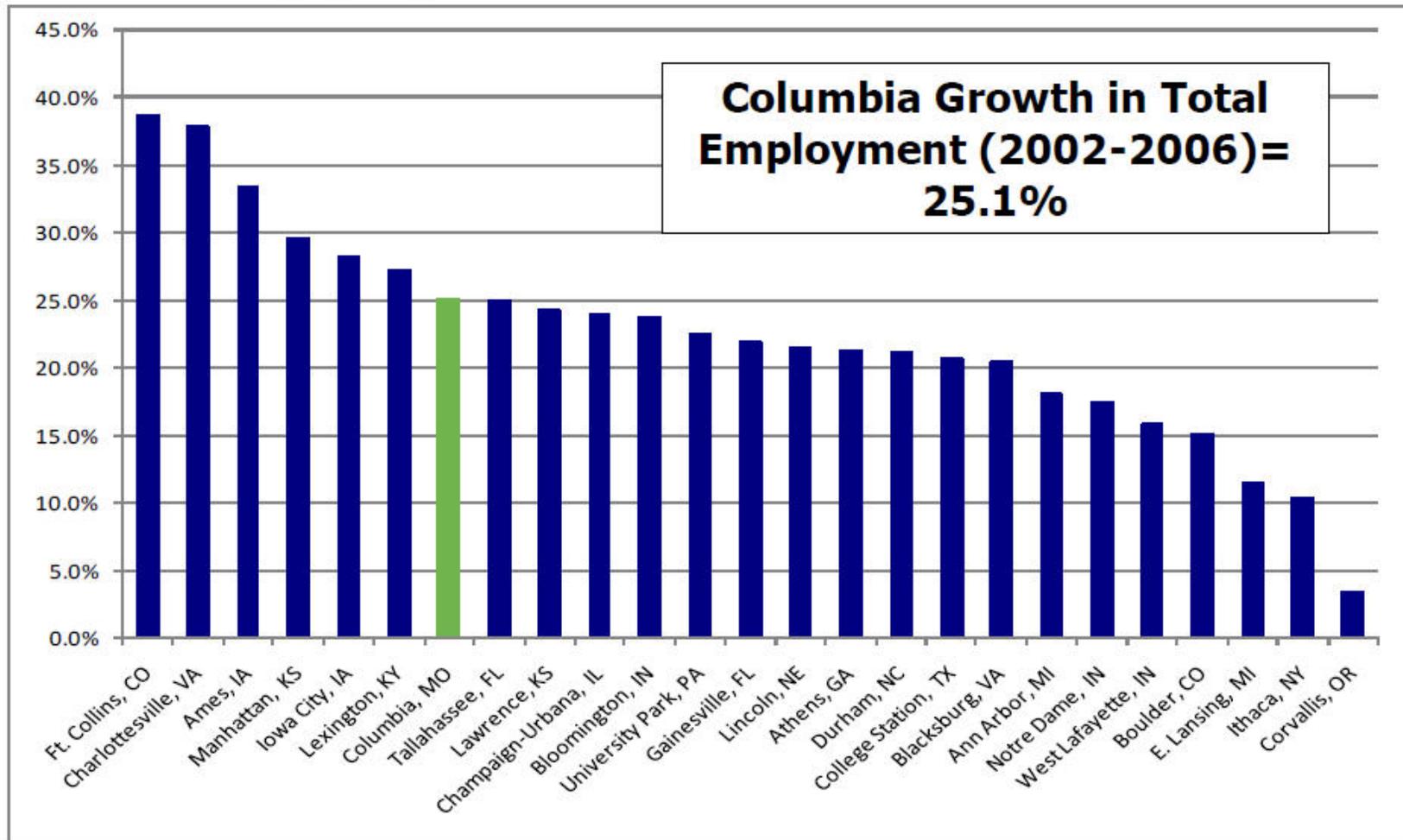
Economic Performance Indicators

Personal Per Capita Income, 2006



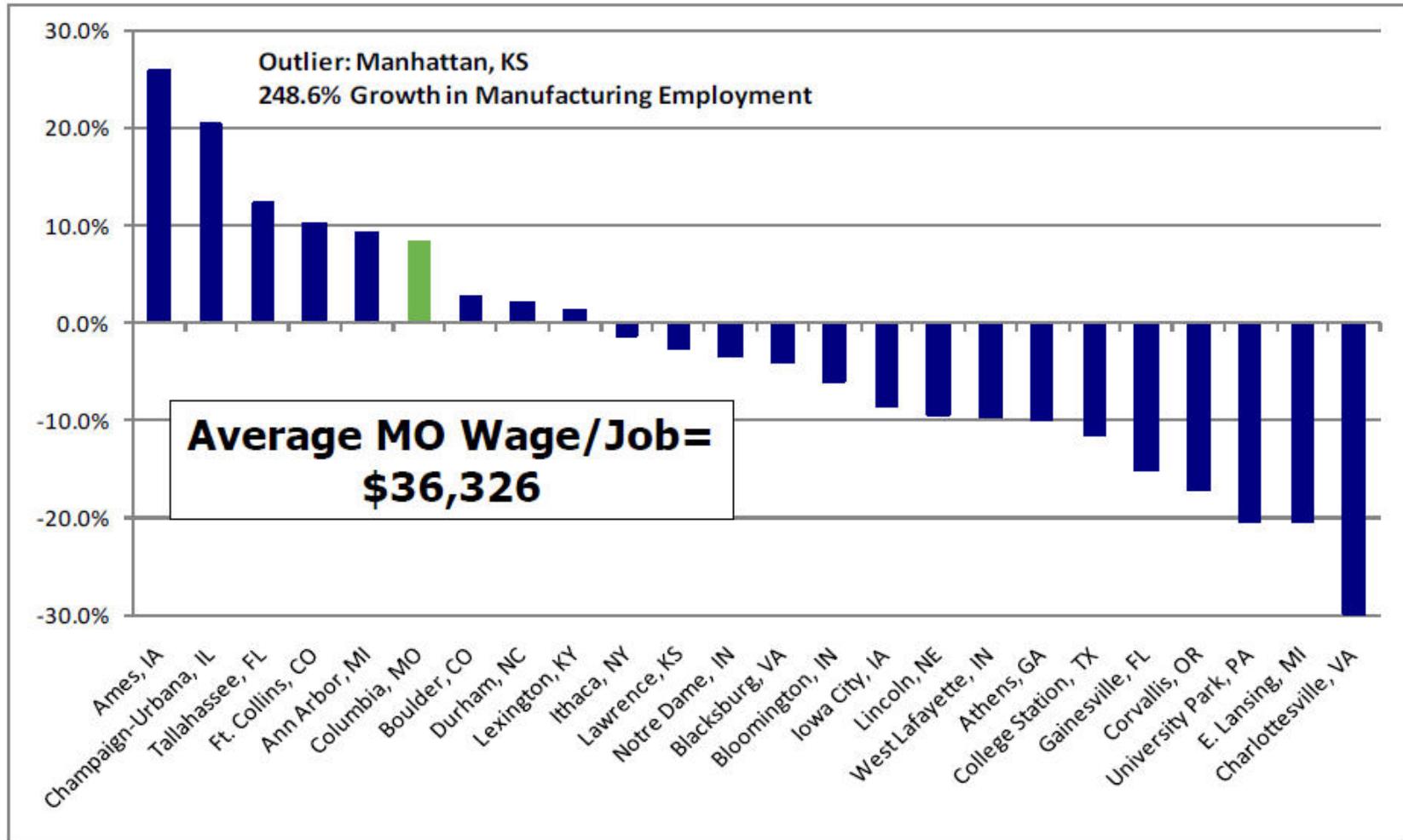
Economic Performance Indicators

Growth in Total Employment, 2002-2006



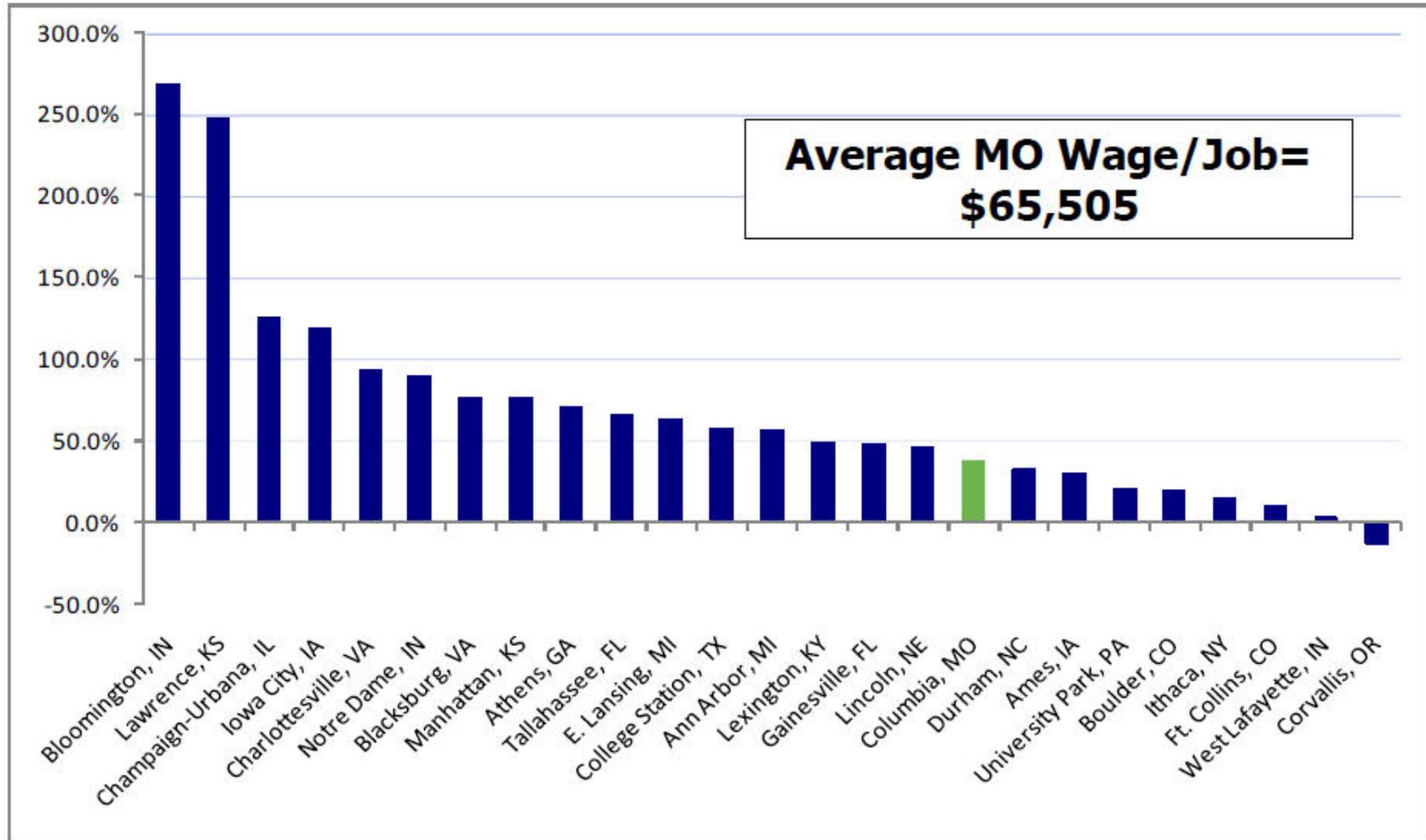
Economic Performance Indicators

Growth in Manufacturing Employment, 2002-2006



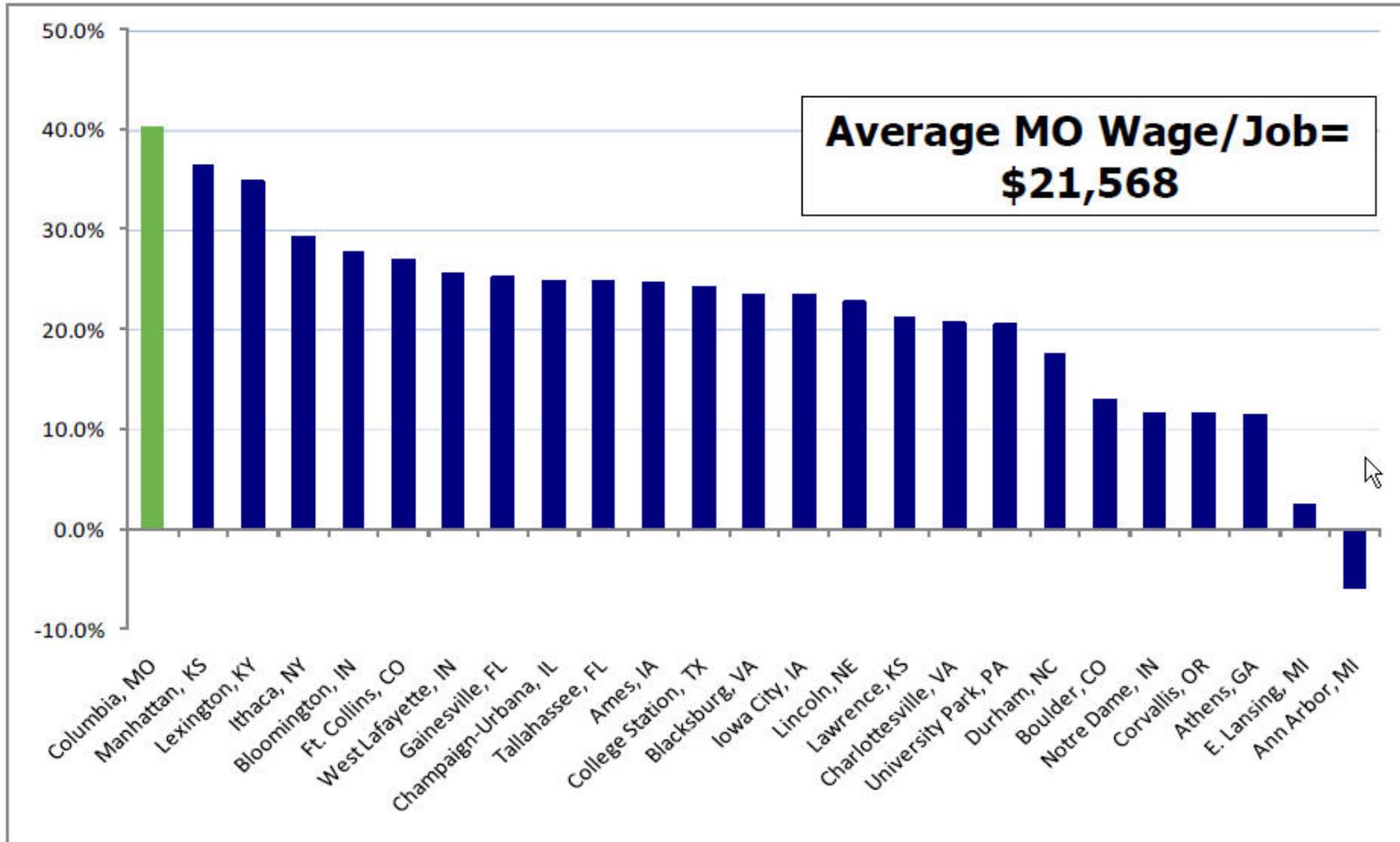
Economic Performance Indicators

Growth in High-Tech Employment, 2002-2006



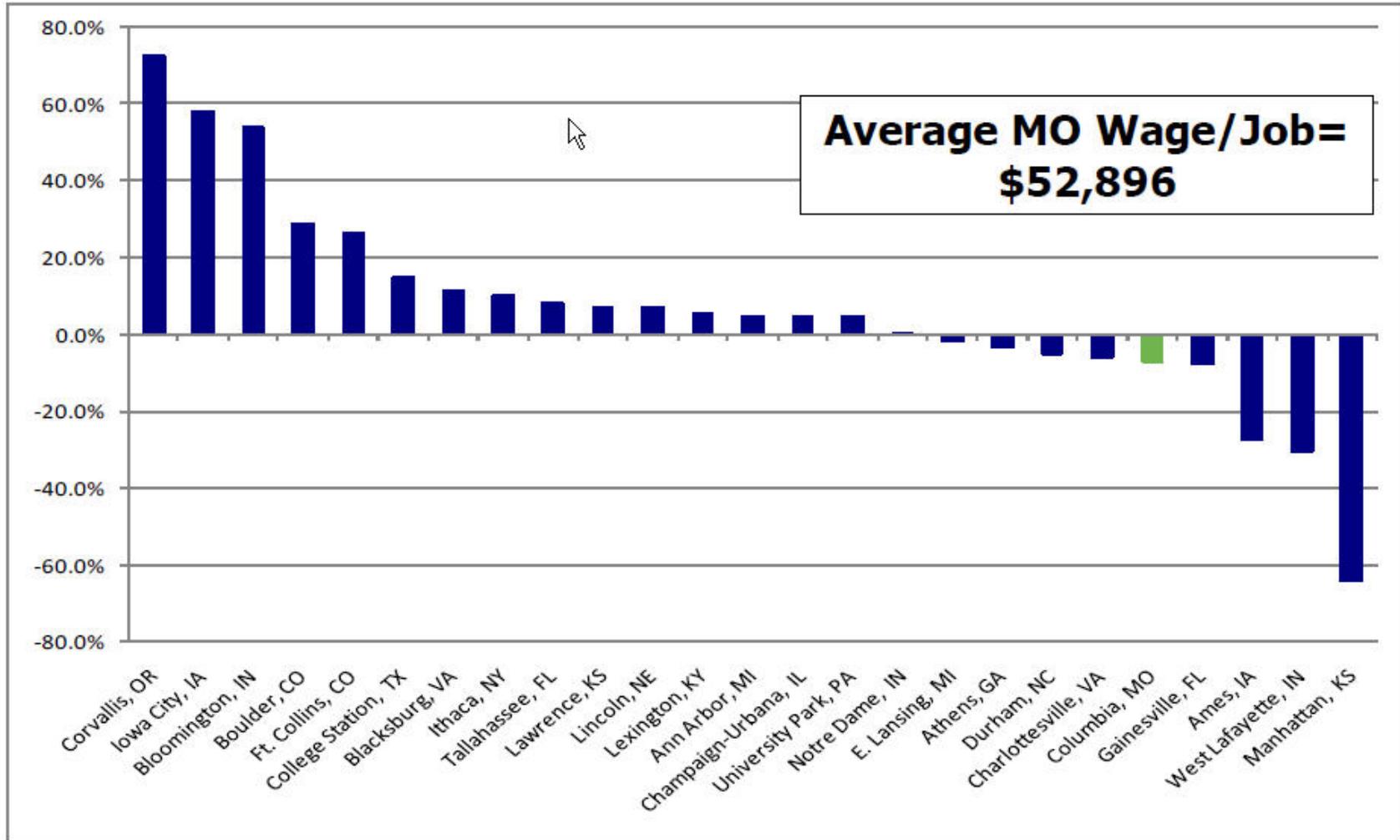
Economic Performance Indicators

Growth in Retail Employment, 2002-2006



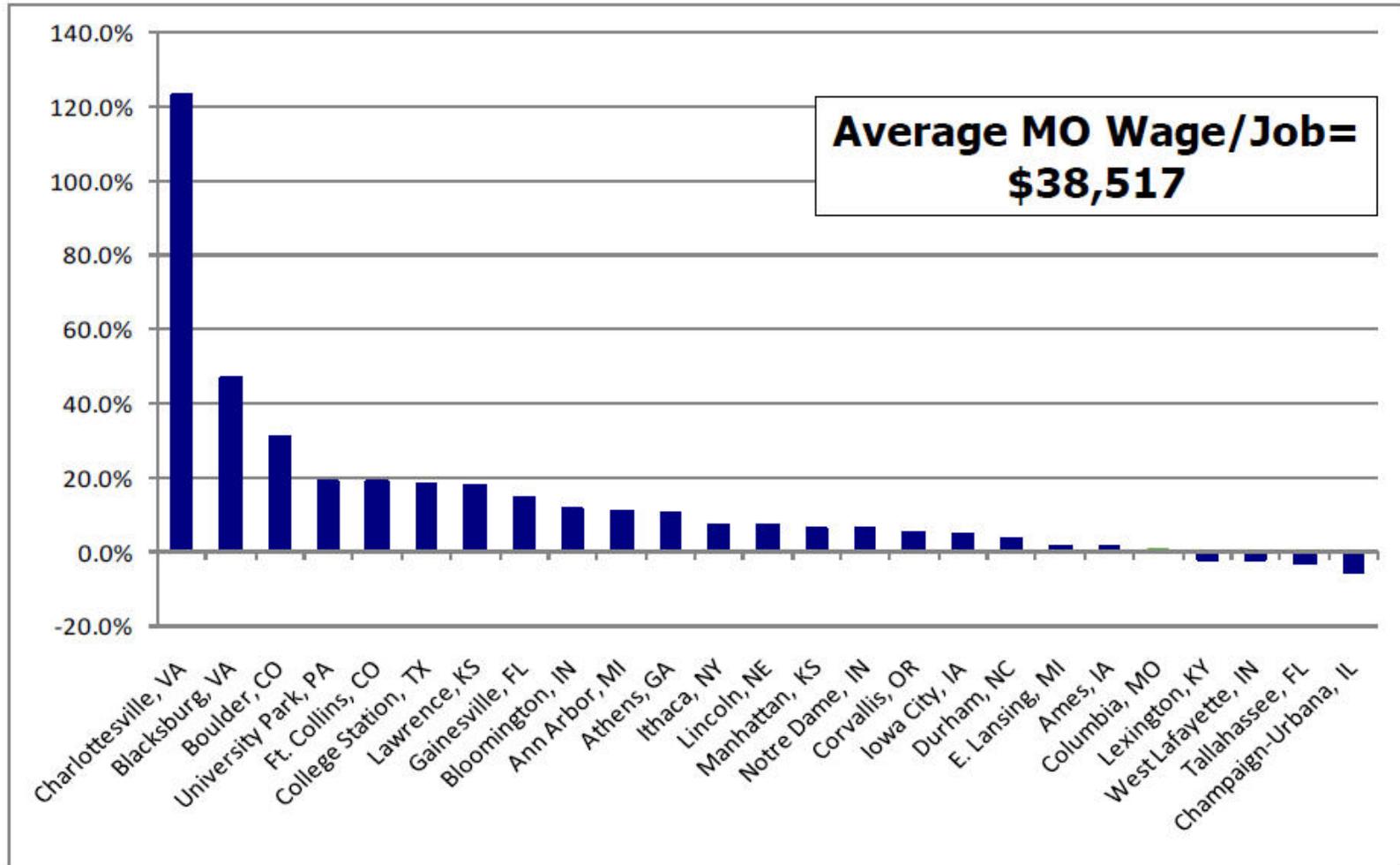
Economic Performance Indicators

Growth in Insurance Employment, 2002-2006



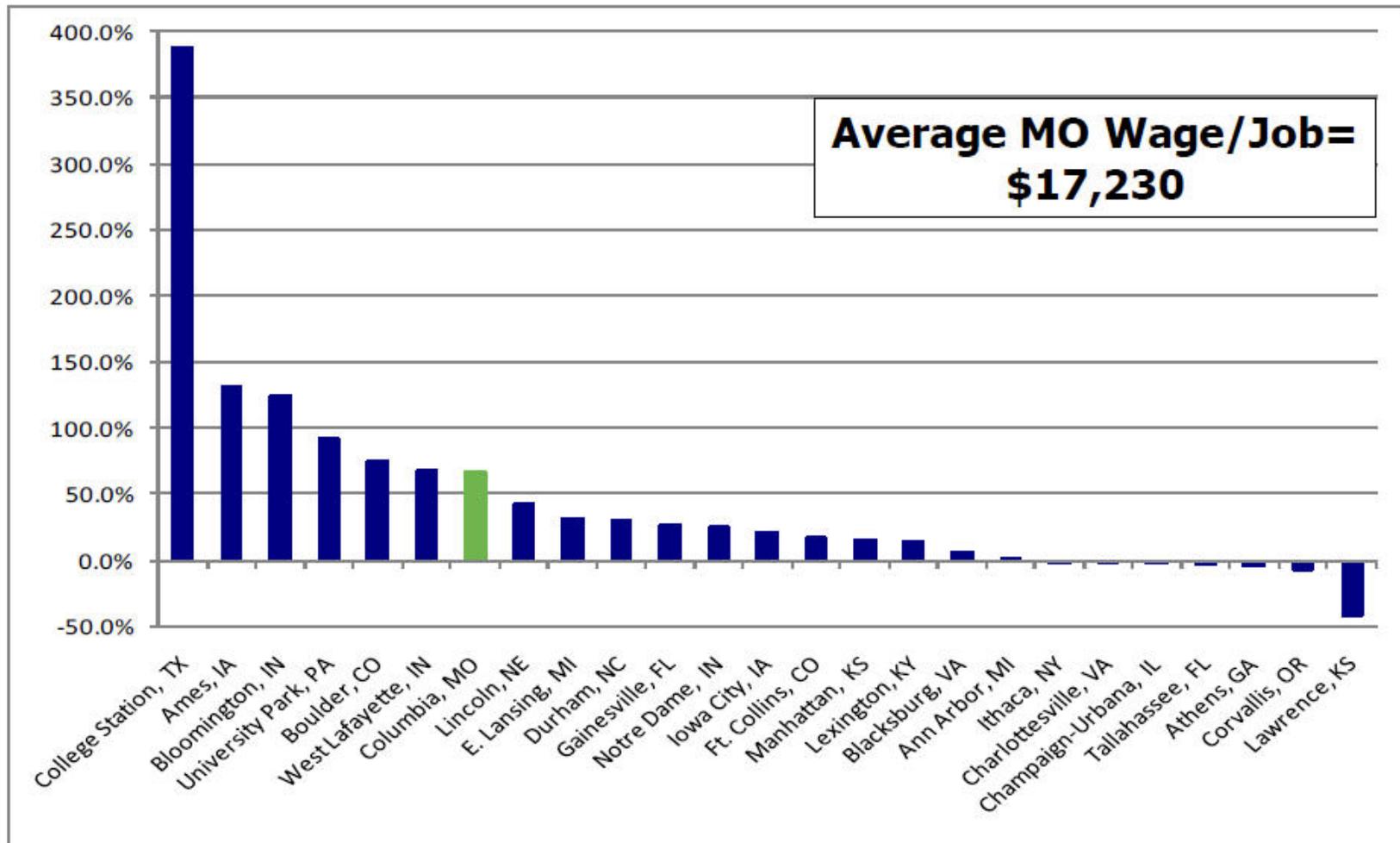
Economic Performance Indicators

Growth in Private Medical Employment, 2002-2006



Economic Performance Indicators

Growth in Retirement-Related Employment, 2002-2006



Final Report

The final report will be completed by CPAC at the end of this month and presented to the Council. The report will include an executive summary of the key findings, and the results for the City of Columbia Scenario Report.