

Northwest Connecticut Data Profile 2013

Economic & Demographic Analysis

An excerpt from the Northwest Connecticut Comprehensive Economic Development Strategy

This profile contains data on:

- Population and Age
- Race and Ethnicity
- Housing, Households and Families
- Educational Attainment
- Employment Information
- Income
- Industry Employment and Wages
- Municipal Fiscal Data
- Summary of the Implications of this Economic & Demographic Analysis



This data can be used to:

- Assess the market for new or expanded products or services in Northwest Connecticut
- Inform your business plan

Litchfield Hills Council of Elected Officials

Northwestern Connecticut Council of Governments

Northwest Connecticut Economic Development Corporation

The Chamber of Commerce of Northwest Connecticut

Northwest Connecticut Comprehensive Economic Development Strategy and Action Agenda

PROJECT TEAM

With the assistance of many other individuals and organizations from the Northwest Connecticut region, the primary project team responsible for the preparation of this Comprehensive Economic Development Strategy (CEDS) and Action Agenda included:

The Litchfield Hills Council of Elected Officials

The Northwestern Connecticut Council of Governments

The Northwest Connecticut Economic Development Corporation

The Chamber of Commerce of Northwest Connecticut

Garnet Consulting Services, Inc.

The Connecticut Economic Resource Center

ACKNOWLEDGEMENTS

The Northwest Connecticut region would like to thank the following organizations for financially supporting the development of this Comprehensive Economic Development Strategy (CEDS) and Action Agenda:

The U.S. Economic Development Administration

Connecticut Light and Power Company

Bicron Electronics Company

Borghesi Building and Engineering Company, Inc.

Connecticut Economic Development Association

Parker Productions, LLC

William Baxter

Winvian

Preparation of this CEDS and Action Agenda would not have been possible without the extensive participation of numerous volunteers, partner organizations, and elected leadership from the region's twenty communities throughout the entire CEDS development process.

An electronic copy of this CEDS can be downloaded from:

http://www.nwctedc.com/nw_ct_ceds_2013.htm

Northwest Connecticut Comprehensive Economic Development Strategy and Action Agenda

List of Figures

Figure #	Figure Title	Page
1	Planning Regions in Connecticut	9
2	Northwest Connecticut Economic Development Region	10
3	Major Transportation Network in Northwest Connecticut	11
4	Town Populations in 2010 for Northwest Region	21
5	Population Density, 2010	22
6	Population Density in 2010 for Towns in Northwest Region	23
7	Growth in Population, 2000 to 2010	24
8	Growth in Population from 2000 to 2010 by Town in Northwest Region	25
9	Distribution of Population in Northwest Region by Age, 2010	26
10	Percentage Change by Age Group in Northwest Region, 2000 to 2010	27
11	Percentage Point Difference from the Nation in Age Distribution, 2010	28
12	Change in Age Distribution between 2000 & 2010	29
13	Population by Ethnicity, U.S., Connecticut and Northwest Region - 2010	30
14	Change in Total Population by Race in Northwest Region Between 2000 & 2010	31
15	Percentage of Population by Racial Group - Northwest Region, 2000 & 2010	32
16	Percentage of Population in Northwest Region that was Non-White in 2010, by Community	33
17	Hispanic Portion of Total Population, U.S., Connecticut and Northwest Region, 2000 & 2010	34
18	Hispanic Percentage of 2010 Population by Community	35
19	Population Living in Households 2000 & 2010	37
20	Percent Increase in Number of Households, 2000 to 2010	38
21	Percentage of Population in Households by Community, 2000 & 2010	39
22	Percent Change in Number of Households by Community from 2000 & 2010	40
23	Non-Family Households as Percentage of Total Households in 2000 & 2010	41
24	Percentage of Non-Family Households as Portion of All Households in 2000 & 2010	42
25	Percentage of Husband-Wife Family Households as Portion of All Households, 2000 & 2010	43
26	Percentage of Husband & Wife Family Households as Portion of Total Households, by Community, 2000 & 2010	44
27	Percentage Growth of Households & Families, 2000 & 2010	45
28	Average Household Size, 2000 & 2010	46
29	Household Size by Community, 2010	47
30	Change in Household Size by Community, 2000 to 2010	48
31	Average Family Size 2000 & 2010	49
32	Percentage Increase in Number of Occupied Housing Units, 2000 & 2010	50
33	Occupied and Vacant Housing Units, 2010	51
34	Occupied Owner and Renter Housing Units, 2010	52
35	Percentage of Occupied Housing Units that are Renter Occupied, by Community, 2010	53
36	Median Housing Values by Community, 2010	54

37	Use of Vacant Housing, 2010	55
38	Percentage of Vacant Housing for Seasonal, Recreation, or Occasional Use by Community, 2010	56
39	Distribution of Northwest Region's Population 25 Years or Older by Educational Attainment, 2010	59
40	Percentage of Population 25 Years or Older with Bachelor's Degree or More by Community, 2010	60
41	Distribution of Population 25 Years or Older by Educational Attainment, 2010	61
42	Change in Distribution of the Educational Attainment of the Population 25 Years or Older from 2000 to 2010	62
43	Growth in Population from 2000 to 2010 Within Educational Attainment Classification for Northwest Region	63
44	Unemployment Rate, 2011	64
45	Trend in Unemployment Rate 2000 to 2011	66
46	Index of Employment, 2000 to 2010	67
47	Growth in Labor Force 2000 to 2011	68
48	Change in Labor Force from 2000 to 2010, by Community	69
49	Distribution of Employment by Municipality 2010	70
50	Change in Employment (by Place of Work), 2000 to 2010	71
51	Median Household Income, 2011	72
52	Median Household Income by Community, 2011	73
53	Change in Median Household Income 2000 to 2010	74
54	Percent of Households with Annual Incomes Under \$20,000 & Over \$100,000, 2011	75
55	Distribution of Employment by Industry, 2010	76
56	Connecticut Wide Industry Segmentation, Major Industries, 2005-2010	77
57	Connecticut Wide Industry Segmentation, Specific Industries, 2005-2010	78
58A	Connecticut Wide Industry Segmentation, Specific Industries with Potential for Development and Growth, 2005-2010	79
58B	Connecticut Wide Industry Segmentation, Specific Industries with Potential for Development and Growth, 2005-2010 Continued	80
59A	Employment by Industry in the Region, Part A, 2010	82
59B	Employment by Industry in the Region, Part B, 2010	83
59C	Employment by Industry in the Region, Part C, 2010	84
59D	Employment by Industry in the Region, Part D, 2010	85
60	Wages Per Employee by Industries, 2000 & 2010, Connecticut and Torrington LMA	86
61	Change in Wages per Employee for All Industries, 2000 to 2010, Connecticut and Torrington LMA	87
62	Annual Employee Wages by Industry, 2010, Connecticut and Torrington LMA	88
63A	Employee Wages by Industry in the Region, Part A, 2010	90
63B	Employee Wages by Industry in the Region, Part B, 2010	91
63C	Employee Wages by Industry in the Region, Part C, 2010	92
63D	Employee Wages by Industry in the Region, Part D, 2010	93
64	Grand List per Capita by Community, 2010	94
65	Growth in total Grand List from 2000 to 2010 by Community	95
66	Commercial & Industrial Property Assessments as a Percentage of Total Grand List, 2000 & 2009, by Community	96
67	Growth in Commercial & Industrial Grand List Property Valuations from 2000 to 2009, by Community	97

List of Tables

Table #	Table Title	Page
1	Northwest Connecticut CEDS Committee Membership and Representation	13
2	Northwest Connecticut CEDS Meetings	18
3	Labor Force Data, July 2012	65
4	Largest Employment Sectors by Community, 2010	81
5	Highest & Lowest Wage & Jobs by Community, 2011	89
6	Percentage Growth in Grand list & Commercial & Industrial Portion, 2000-2009	98
7	Northwest Connecticut Strengths/Opportunities & Weaknesses/Issues Summary	103
8	Northwest Connecticut CEDS Priority & Other Projects	108
9	Details of Regional Vital (Priority) & Other Projects	110
10	Economic Performance Evaluation Metrics	137

List of Exhibits

Exhibit #	Exhibit Title	Page
1	Orientation and Focus Groups Meeting Presentation	E-1
2	Focus Group Discussion Agenda and Meeting Notes	E-7
3	Focus Group Facilitator and Recorder Guidelines	E-11
4	Summary of NW CT CEDS Online Survey	E-13
5	NWCT CEDS Survey Results – Themes, Draft Goals and Initiatives	E-17
6	Project Mid-Point Briefing and Work Session Agenda	E-21
7	Results of Initiative Prioritization Dot Exercise – June 27, 2012	E-28
8	Postcards from the Future Summary	E-30
9	Project Solicitation Form – Instructions	E-33
10	Project Solicitation Form	E-34

Regional Analysis

Data Profile - Introduction

The Northwest Connecticut region is comprised of the following 20 communities:

Barkhamsted	Hartland	New Hartford	Sharon
Canaan	Harwinton	Norfolk	Torrington
Colebrook	Kent	North Canaan	Warren
Cornwall	Litchfield	Roxbury	Washington
Goshen	Morris	Salisbury	Winchester

This portion of the CEDS provides an economic and demographic profile of the region and its communities.

A review of data relating to a local or regional economy is usually an early step in the consideration and evaluation of a location by companies looking for a new location or comparing their current location with alternatives. A detailed Economic Base Analysis is also a required element of a Comprehensive Economic Development Strategy (CEDS).

The International Economic Development Council (IEDC) maintains a recommended standardized data base (referred to as the Site Selection Data Standards) providing a set of 25 spreadsheets that captures the data points most frequently sought by companies and site location consultants; this set of spreadsheets and an accompanying article about the importance of the Site Selection Data Standards can be found at http://www.iedconline.org/?p=data_standards.

The Connecticut Economic Resource Center (CERC) is the primary agency for collecting and presenting available data for Connecticut and Western Massachusetts. It is important to note the word "available"; while the IEDC Data Standards present an ideal world, not all data is available for every location, particularly smaller communities such as many of those in the Northwest Connecticut region.

This document provides a data profile of the Northwest Connecticut region, and of the regions 20 communities where available, prepared by CERC in May 2012 based on the best available information at that time, with some additional information gathered from other sources by Garnet Consulting Services, Inc. Relevant commentary about the meaning of the data is provided.

Northwest Connecticut CEDS Region

Demographic & Economic Analyses

May 2012



This Demographic and Economic Analysis covers the following topics, for the Northwest Connecticut region, its individual communities (where meaningful data is available), the State of Connecticut, and the United States. Comparisons between the years 2000 and 2010, the points for which the most data are available, are presented.

Dimensions

- Population
- Age
- Race and ethnicity
- Households
- Housing
- Educational attainment
- Labor force and employment
- Incomes and net worth
- Wages
- Jobs by industry
- Fiscal
- United States
- Connecticut
- Northwest Connecticut Region
- Municipalities in Region



Population and Age

The first section of this Demographic and Economic Analysis provides information on population and age.

Figure 4 presents the populations of the communities comprising the Northwest Connecticut region. In 2010 the total population of the region was 105,946, ranging from Canaan, at 1,234 to Torrington at 36,383. In 2000, the regional population was 101,842, or a growth of 4,104 over the decade.

Figure 4

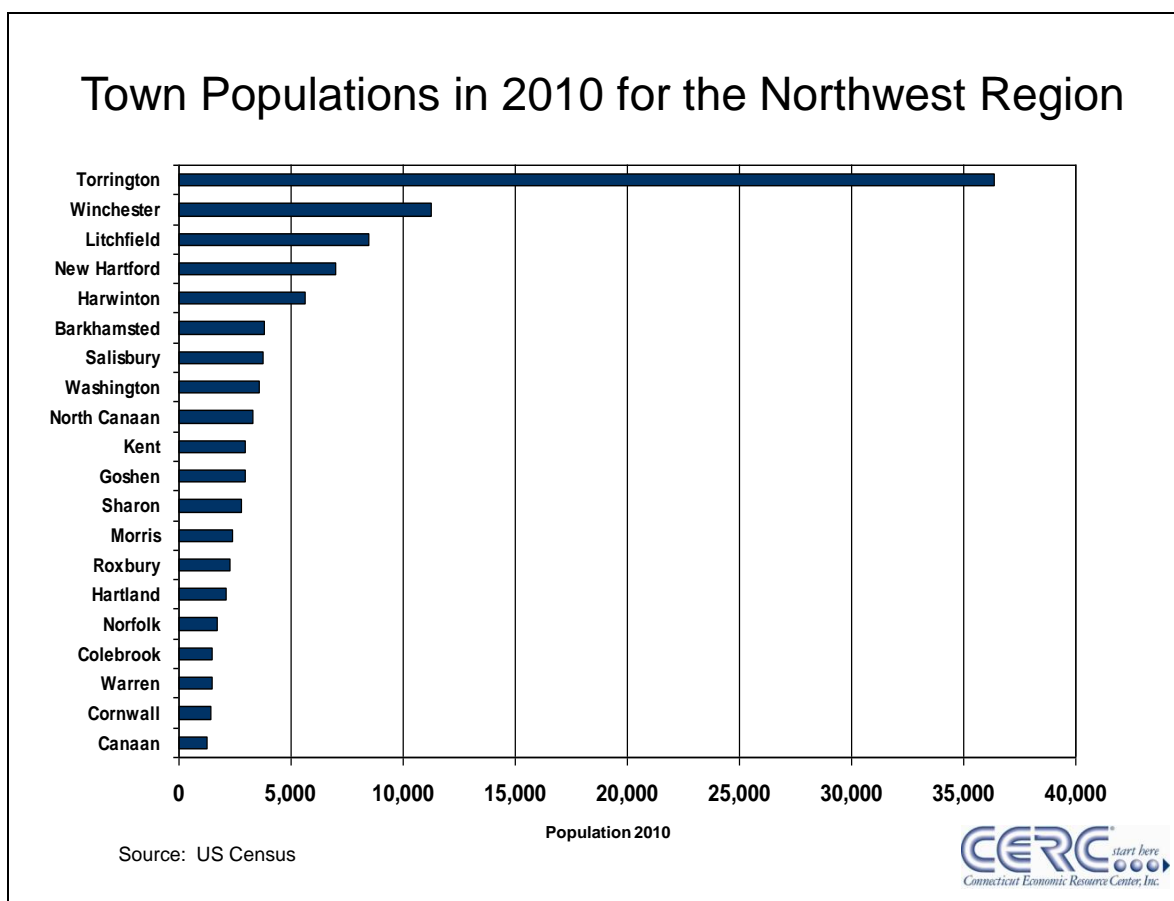


Figure 4 clearly shows the region is comprised of smaller communities. Fifteen of the region's 20 communities are less than 5,000 population. The 36,383 population of Torrington, the region's largest community, is equal to the combined populations of the 5 next largest municipalities in the region: Winchester, Litchfield, New Hartford, Harwinton and Barkhamsted.

Implication

- Because all of the communities in the region are relatively small, none (with the possible exceptions of Torrington, Winchester and Litchfield) can be expected to provide the

complete mixture of retail, service, or employment opportunities needed by residents. Rather, these needs must be met on a regional basis.

The region's 20 communities range in size from 17 (Morris) to 59 (Sharon) square miles with a total of 755 square miles. Figure 5 compares the region's total population density with that of the State. While the state's density is nearly 738 people per square mile, the region's density is only 140 people per square mile.

Figure 5

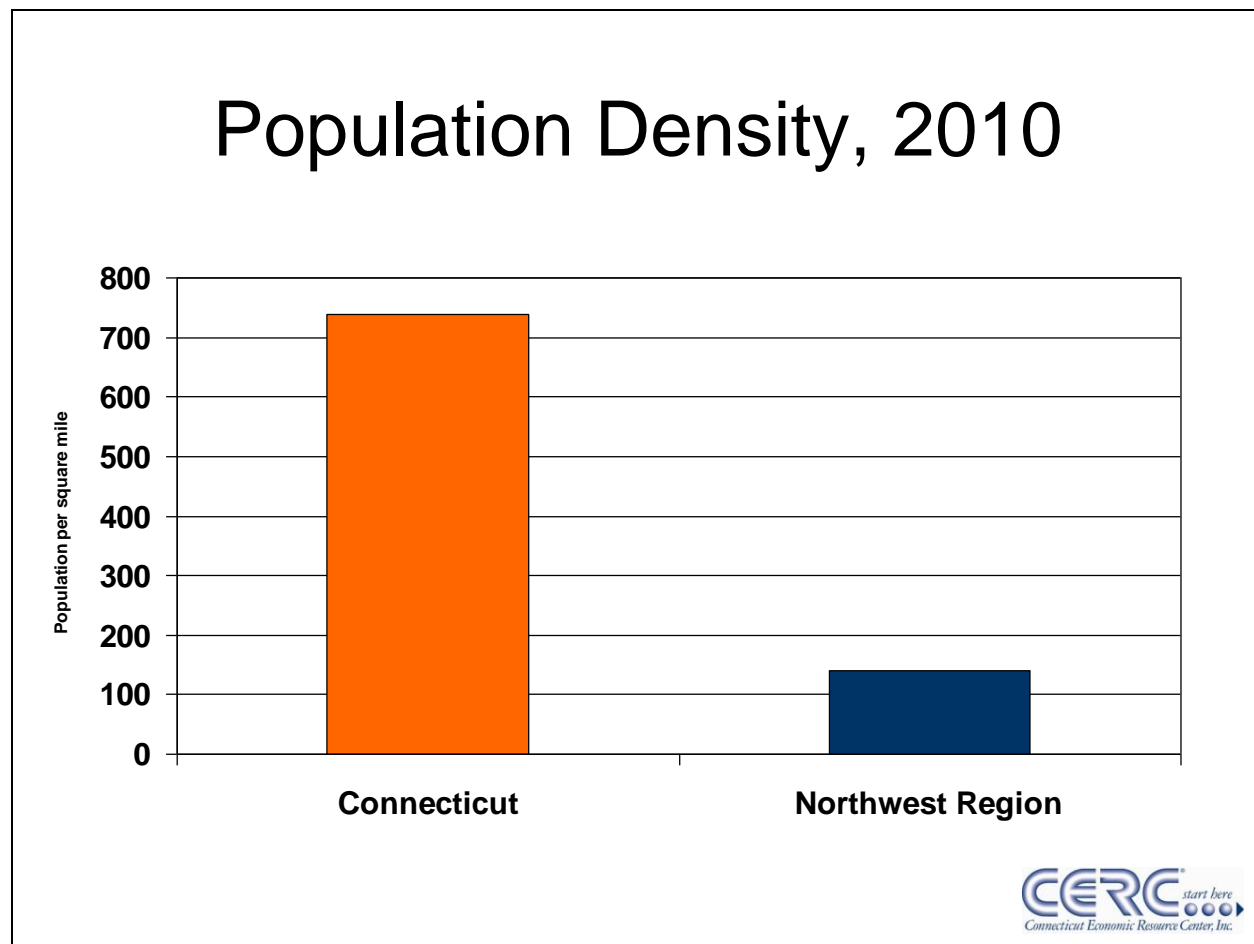
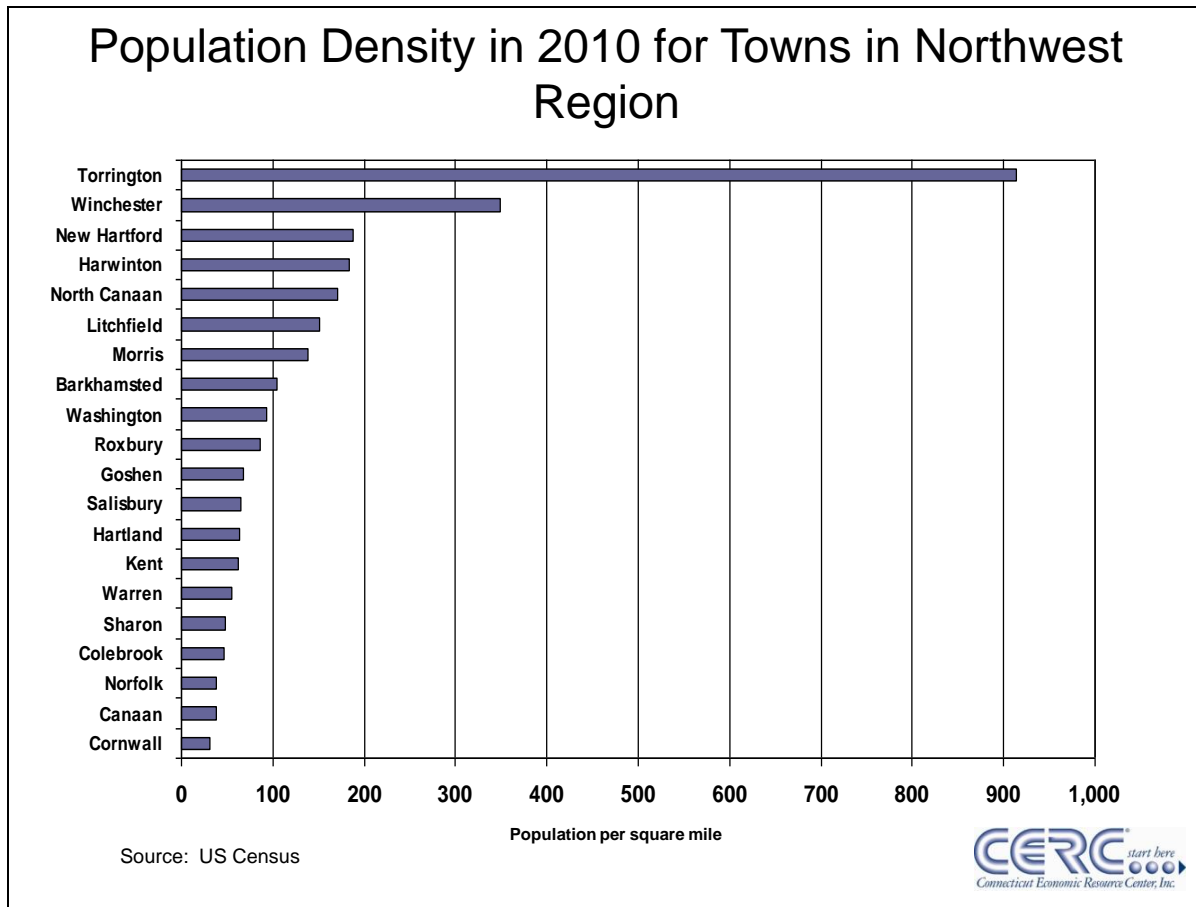


Figure 3 shows the population density for the region's 20 communities. Torrington and Winchester are the only communities with a density of more than 300 people per square mile, with Torrington far more dense than Winchester. Twelve of the region's 20 communities have a density of less than 100 people per square mile.

Figure 6

Implications

- The region's lack of population density makes it difficult to justify locating retail and service businesses in many of the smaller communities.
- Larger communities such as Torrington, Winchester and Litchfield have historically been the centers of economic activity, a situation that is likely to continue in the future.
- Good road networks are necessary to provide convenient commuting between places of residence and work, and convenient access to necessary goods and services.

Figure 7 compares the percentage growth in population between 2000 and 2010 for the Northwest Connecticut Region, the State, and the United States. While there has been population growth in each, the region lags the State, which in turn had a far slower growth rate than the United States.

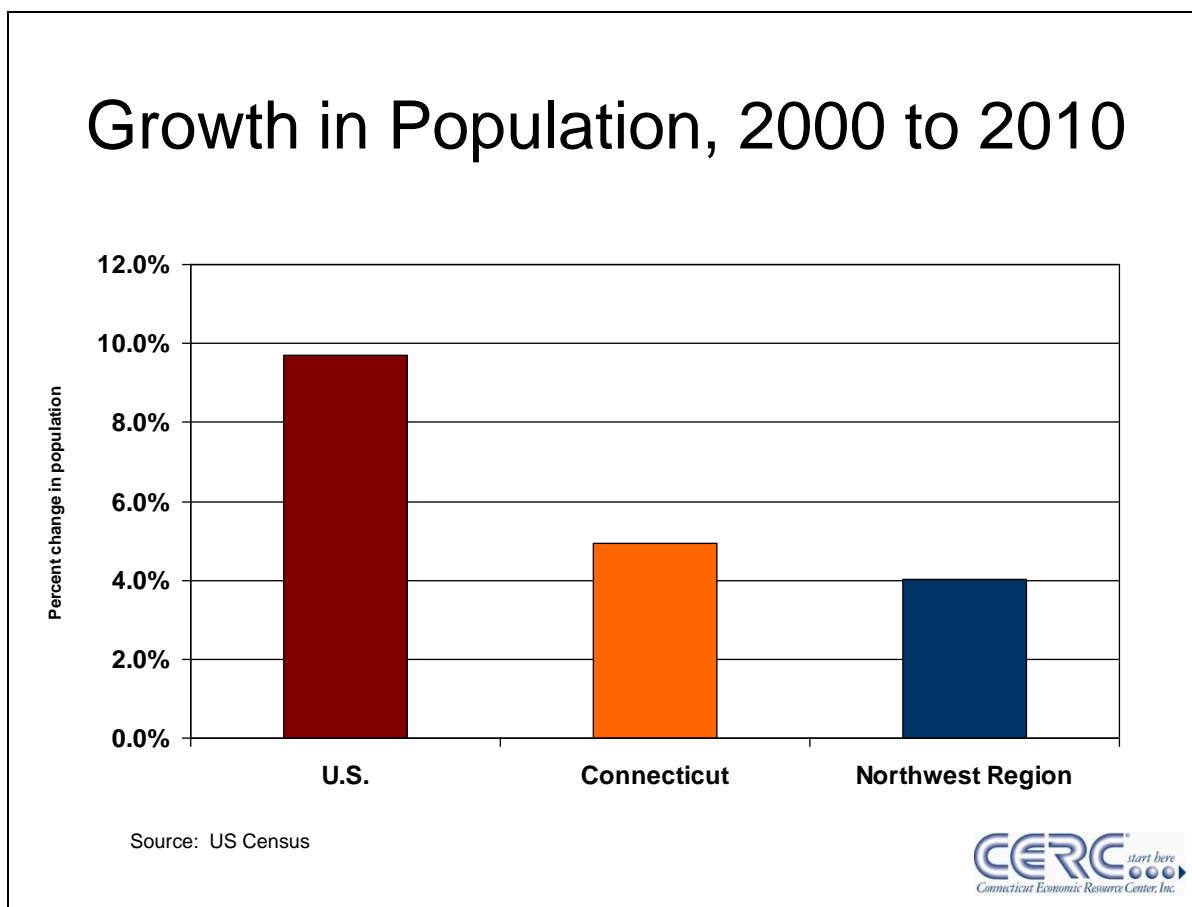
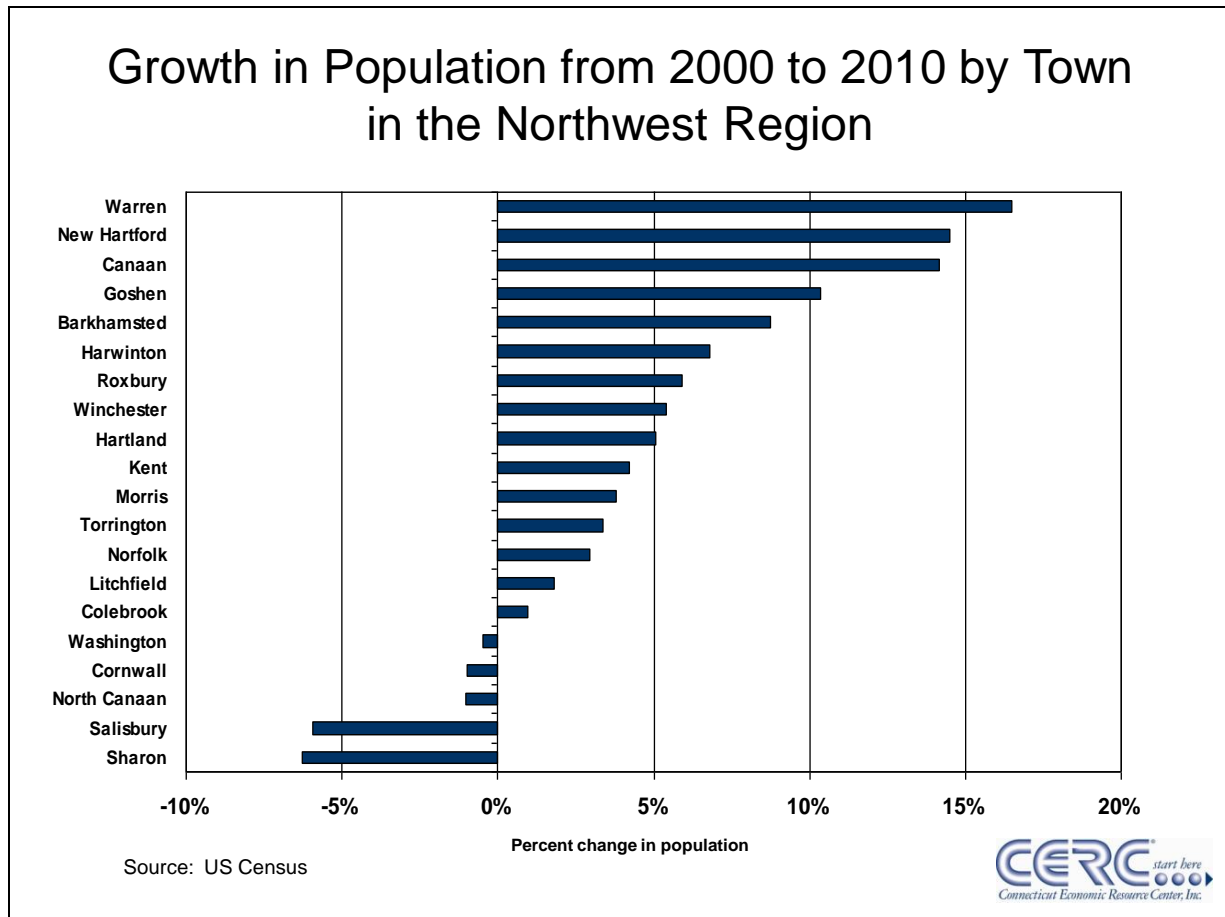
Figure 7

Figure 8 shows the 2000 – 2010 population growth rate for the region’s communities. While 15 of the region’s 20 communities grew during the decade, and 4 (Warren, New Hartford, Canaan, and Goshen) grew more than 10 percent, 5 of the communities (Washington, Cornwall, North Canaan, Salisbury, and Sharon) actually lost population.

CERC estimates of population in 2011 show a regional growth to 106,349, with 13 communities growing between 2010 – 2011, but Colerook, Hartland, Harwinton, New Hartford, Roxbury, Torrington, and Warren losing small numbers of residents.

CERC estimates of population in 2016 show a small regional increase to 108,123, an annual growth rate of 0.33 percent. Only Colebrook was shown to lose population during this 5-year period, with New Hartford and Torrington staying essentially the same.

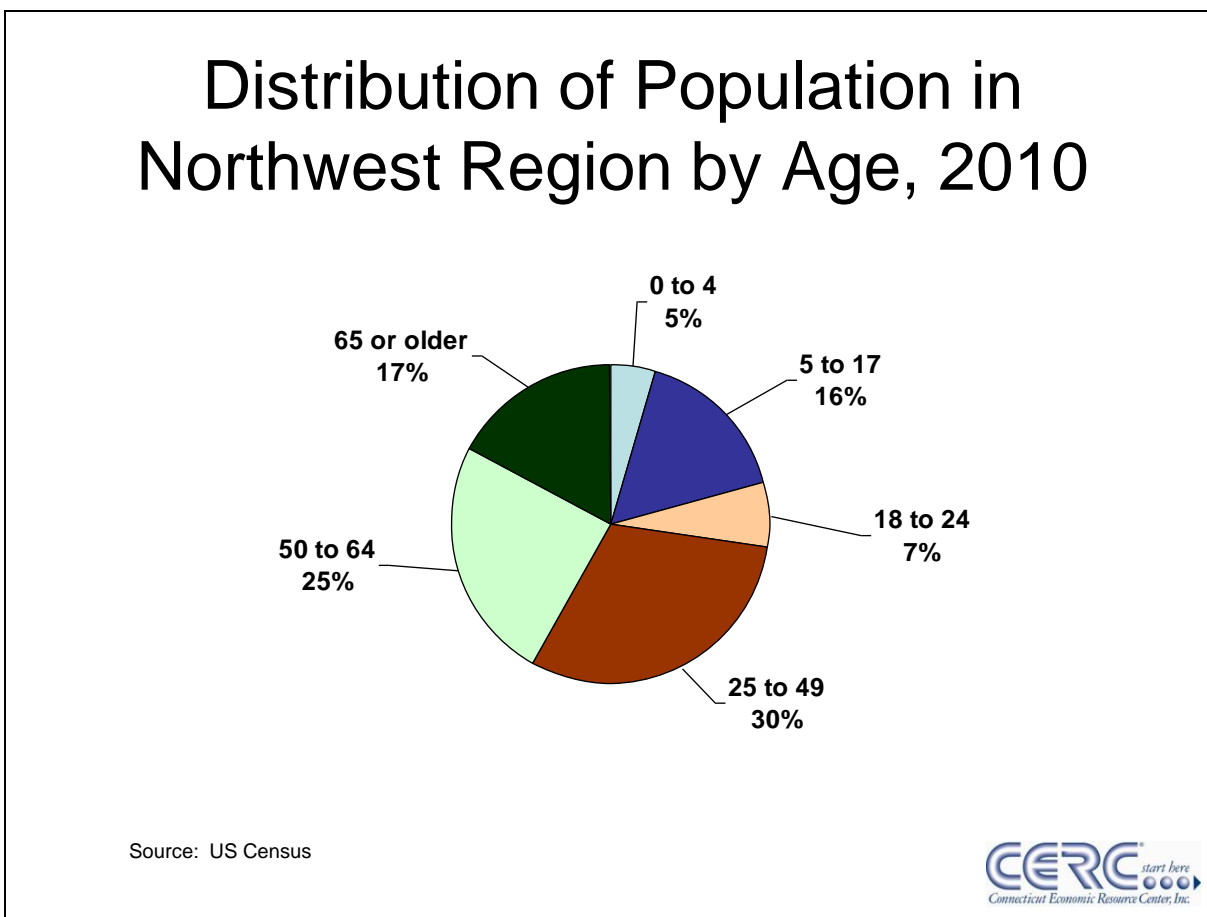
Figure 8

Implications

- Population growth in the region through 2016 will not justify the establishment of many new businesses that are dependent on serving just regional residents.
- Businesses that serve both the resident population and tourists will have a better chance of succeeding.
- Retail and service businesses that can combine in-shop sales with phone-in order fulfillment and/or Internet sales will have the best chance of succeeding.
- Adequate telecommunications and data transmission services are necessary to support the region's merchants.
- Population growth through 2016 will not markedly increase the region's labor pool.
- Adequate road networks are necessary to provide the largest labor pool for the region's employers, particularly those that do not have close proximity to Route 8.

Age of population has a bearing on many aspects of economic development including current and future labor force, shopping preferences, types of services needed, and preferred forms of recreation and culture. Figure 9 shows the region's age breakdown.

Figure 9



Northwest Connecticut is an older and aging area. Because the region is not an official area recognized by the U.S. Bureau of the Census, no official calculation of median age exists. Estimates provided by CERC from Applied Geographic Solutions indicate the region's 2011 median age was 43.76, up from 40.27 in 2000. A May 11, 2011 article in the *Middletown Press* stated that Connecticut's median age in 2010 was 40, while Litchfield County was the oldest in the state at 44.

As shown in Figure 9, 42 percent of its 2010 population was 50 years of age or older, with another 30 percent between 25 and 49. Stated differently, 42 percent of the population are already of retirement age or approaching it. While current economic conditions may keep many of these residents in the workforce longer than they anticipated, this is likely to change rapidly if the economy strengthens.

Thirty percent of the region's population is in the primary working age population of 25 to 49. The region's small cohort in the 18 to 24 year-old age group – only 7 percent of the population – does not provide a large pool of entry level or younger workers. This may be partially offset by potential commuters into the region from the adjacent regions.

Figure 10 shows the change in the region's age makeup between 2000 and 2010. The "soon-to-be-retired" cohort was the fastest growing group. The primary workforce cohort (age 25 – 49) declined in number, but the entry-level or younger workforce cohort (age 18 – 24) grew by more than 25 percent in the decade.

Figure 10

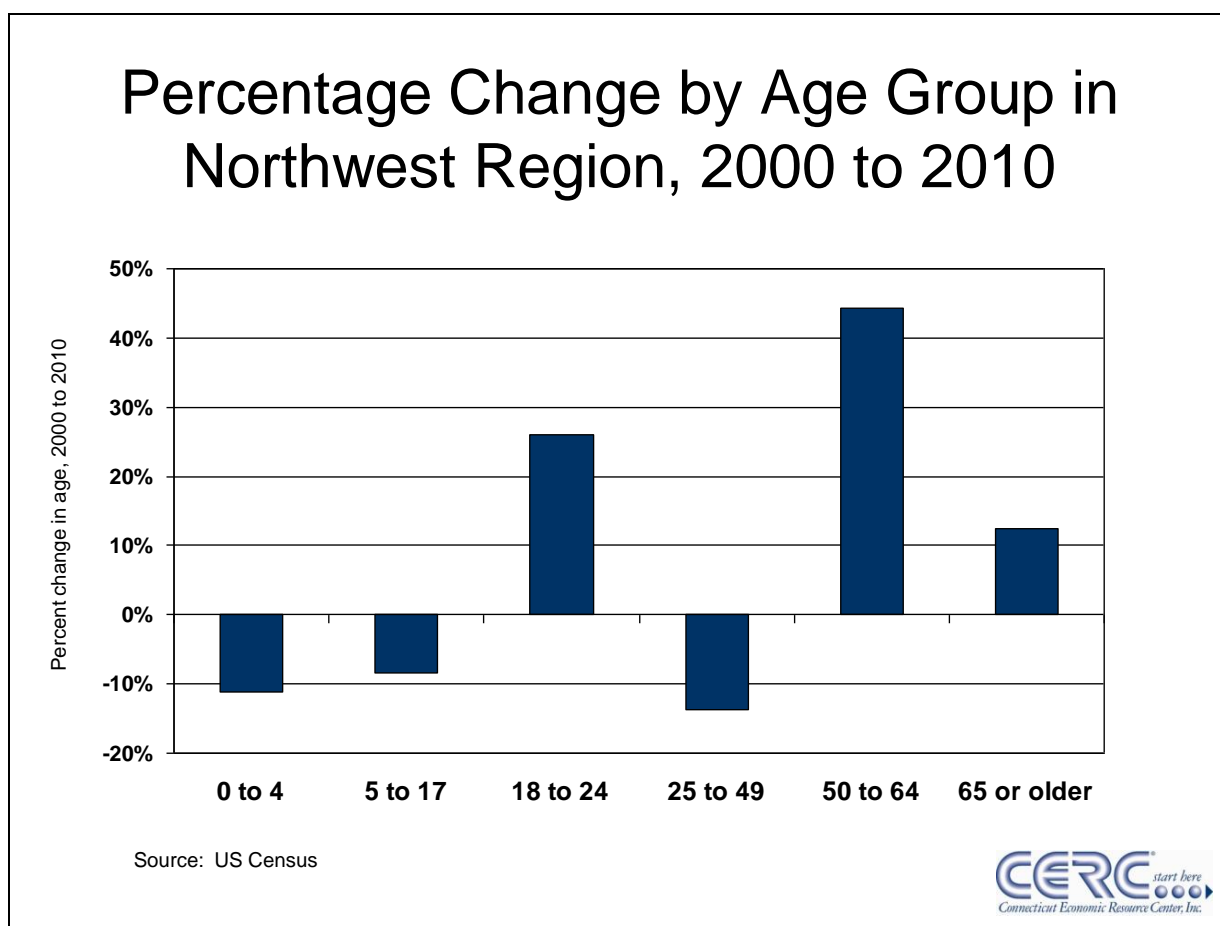


Figure 11 compares the age breakdown of the population for both Connecticut and the region with the national breakdown (which is the 0% baseline). Figure 11 shows that both Connecticut and the region have a higher percentage of their population in the two older age cohorts (50 – 64 and 65 and older), with the region having a substantially higher percentage than the State. Conversely, Connecticut has a lower percentage of its population than the country in the four age cohorts from 0 to 49 years of age, and the Northwest Connecticut region has even fewer residents in these age groups than the State.

Figure 11

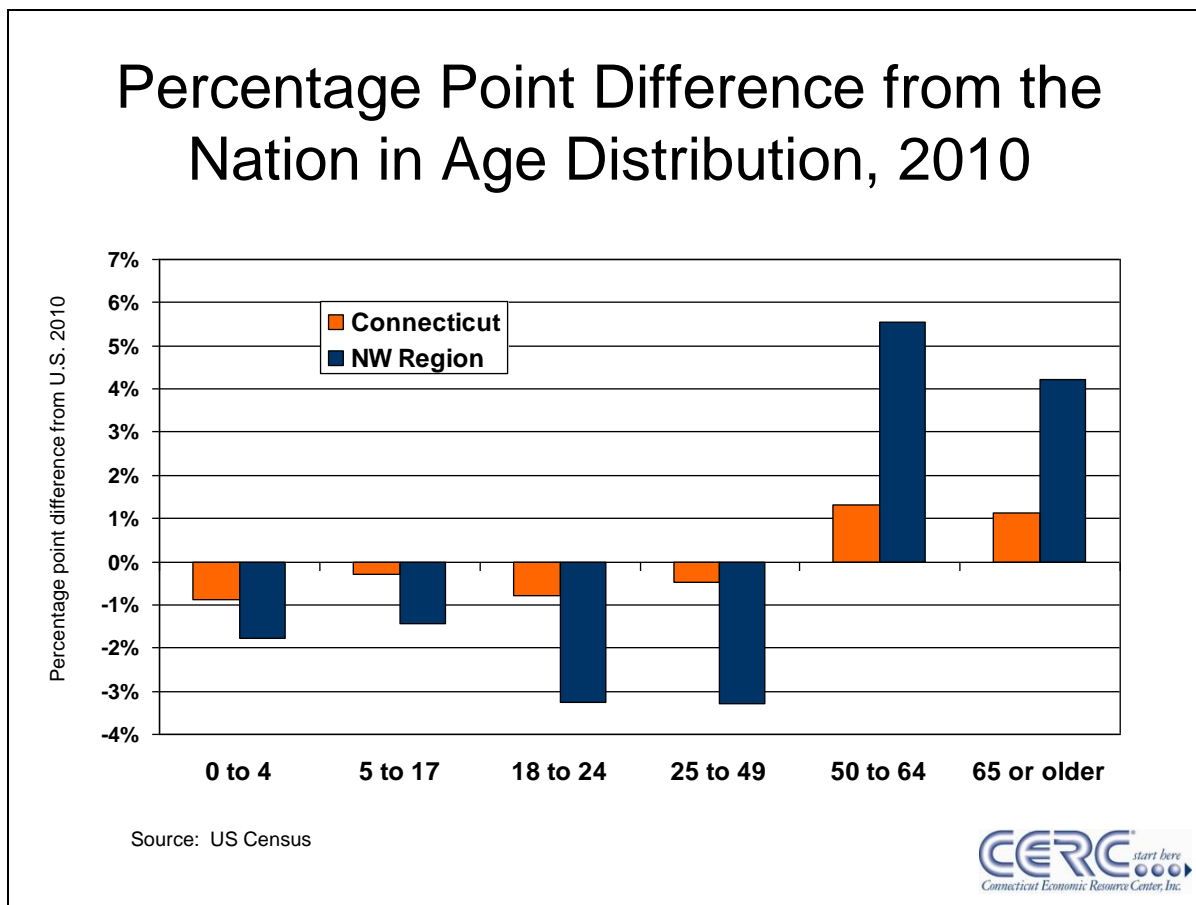
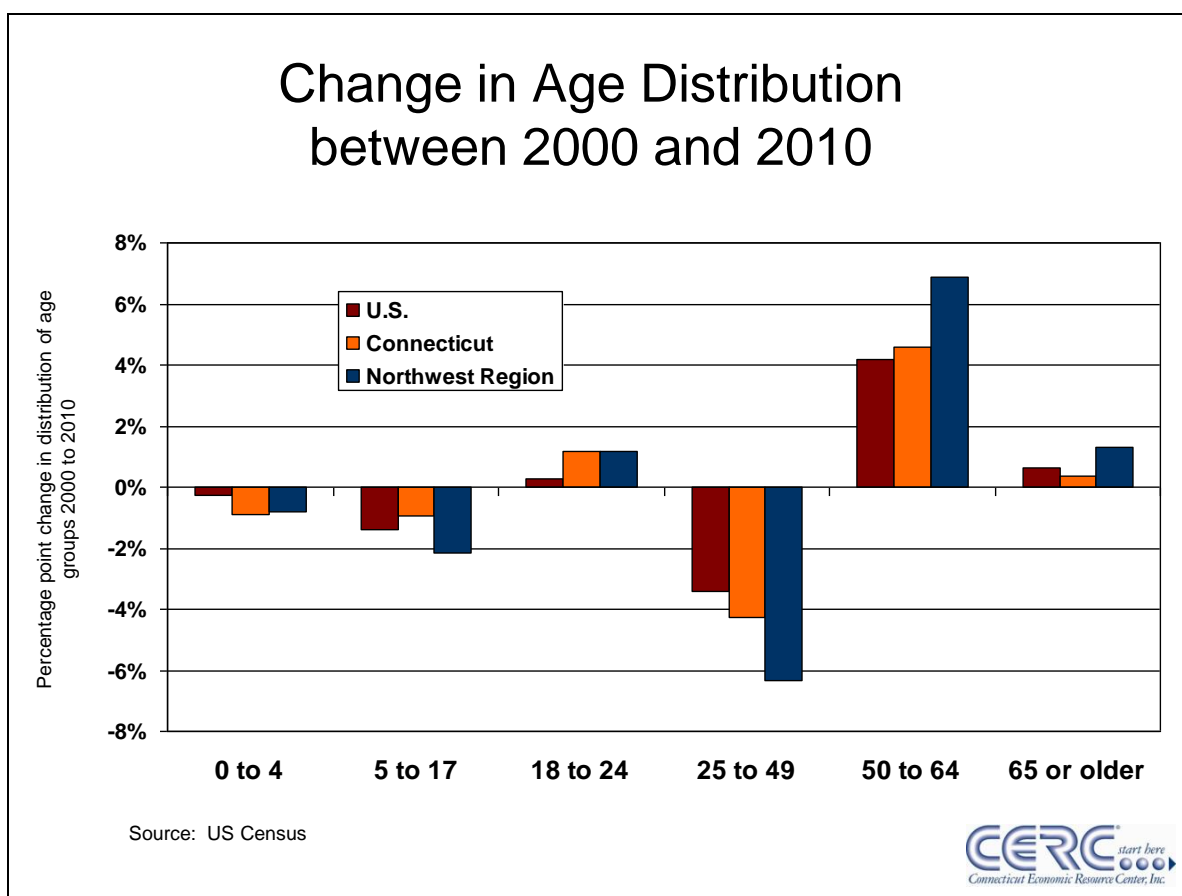


Figure 12 shows the change in age distribution for the nation, state and region between 2000 and 2010. While all have been aging, the Northwest Connecticut region has been aging at a faster rate than Connecticut or the United States as a whole. A small bright spot is a slight growth in the “young worker” age group of 18 – 24. However, the “primary worker” age group of 25 to 49 years declined in the region by more than 6 percent.

Figure 12



Implications

- The region’s aging population and workforce could become a problem in the future for jobs requiring physical labor, and for maintaining an adequate number of people in the workforce.
- An increased focus on incumbent worker training may be necessary to assist older workers in obtaining new skills.
- Appropriate employment opportunities and quality of life factors will be necessary to keep the slightly growing “young worker” group in the region.
- There will be an increasing demand for goods and services desired or needed by older residents.

Race and Ethnicity

This section provides and analyzes data related to the racial and ethnic mix of the region. While such data may not be particularly significant from an economic development perspective, it is presented here as a part of understanding the current and changing makeup of the region.

As shown in Figure 13, the Northwest Connecticut region is less ethnically diverse than either Connecticut or the nation, comprised predominantly of White residents.

Figure 13

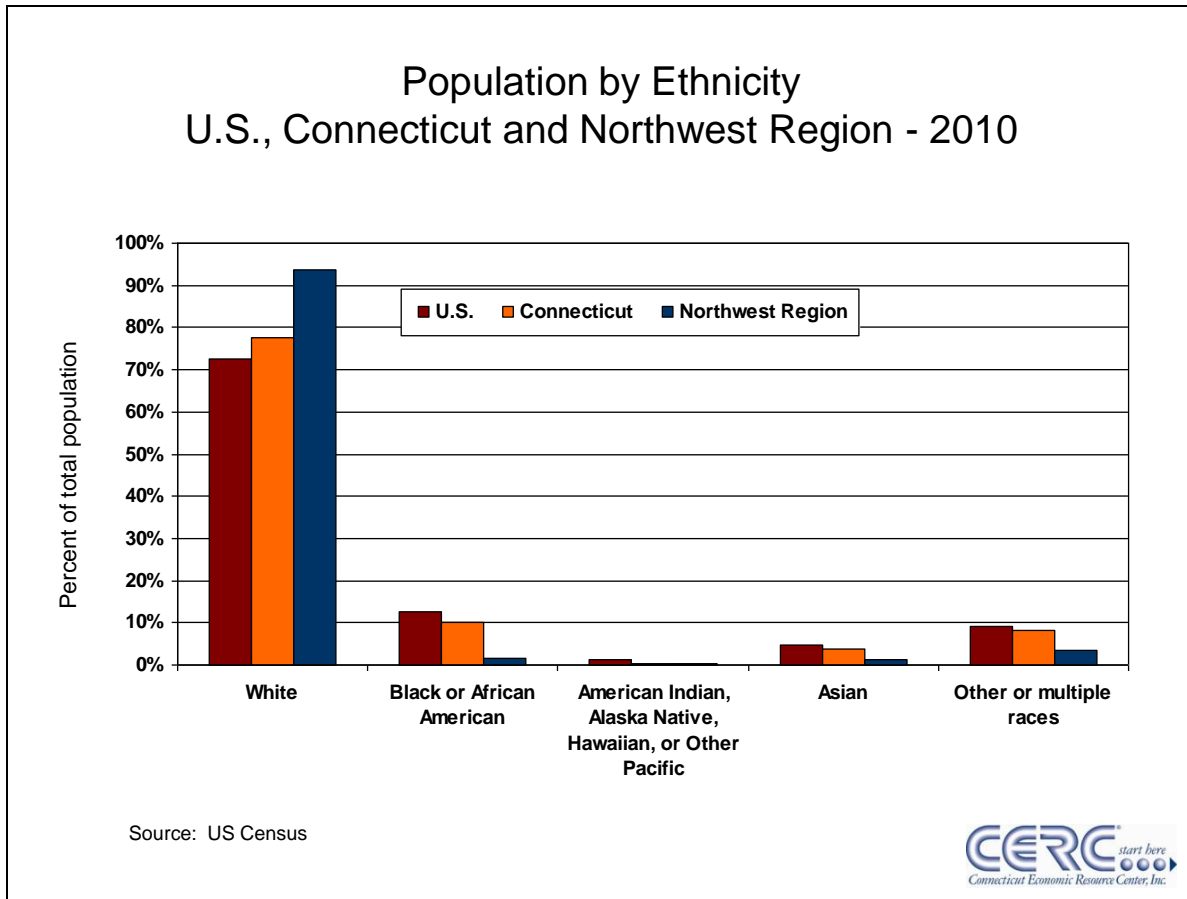


Figure 14 shows the change in the region's racial makeup between 2000 and 2010. During this timeframe, the primary component of population growth was in White residents, but there was a noticeable growth in the Other or Multiple Races group. There were also small gains in the Black/African American and Asian groups.

Figure 14

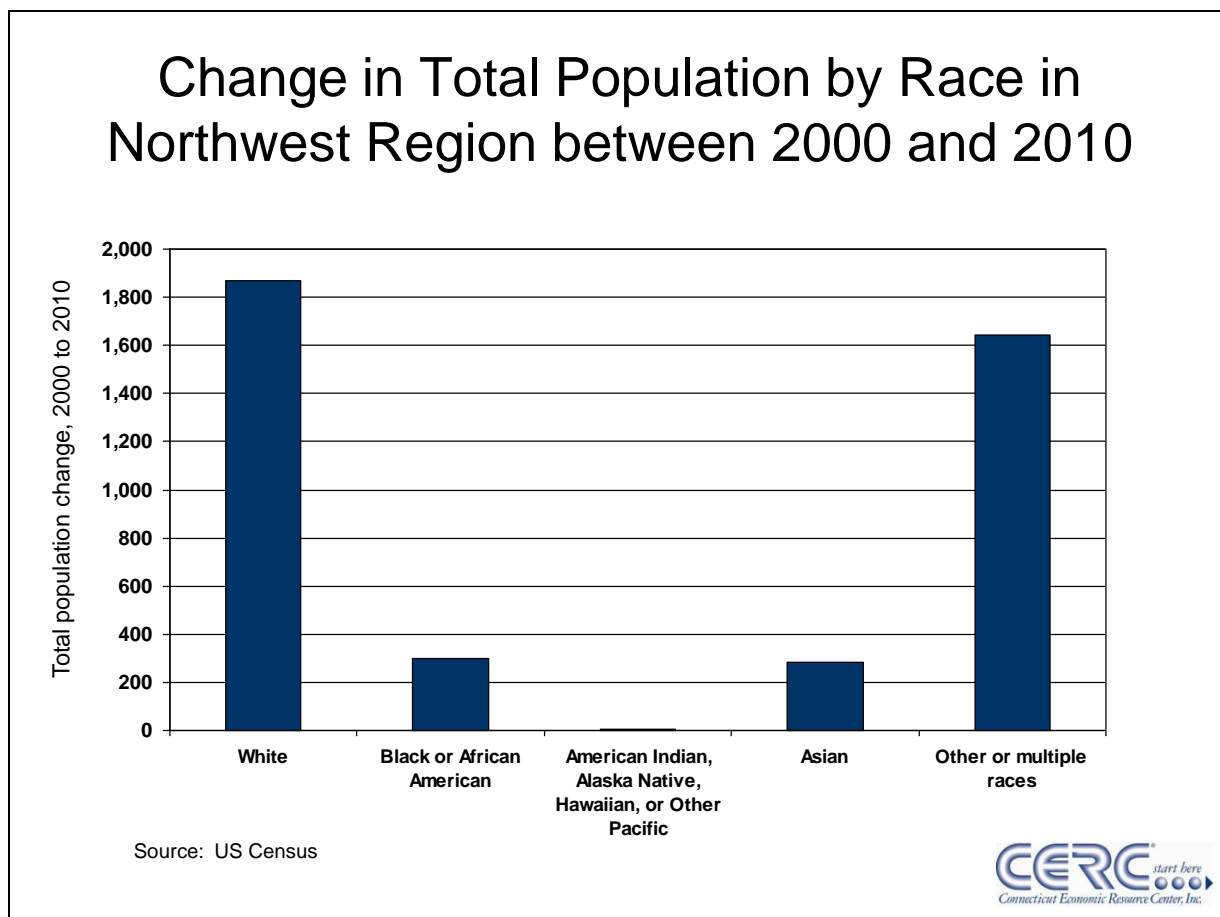


Figure 15 shows that the growth in racial and ethnic groups shown in Figure 14 resulted in the region slightly increasing in diversity between 2000 and 2010. This was due primarily, but not entirely to the growth in the Other or Multiple Race group shown in Figure 14.

Figure 15

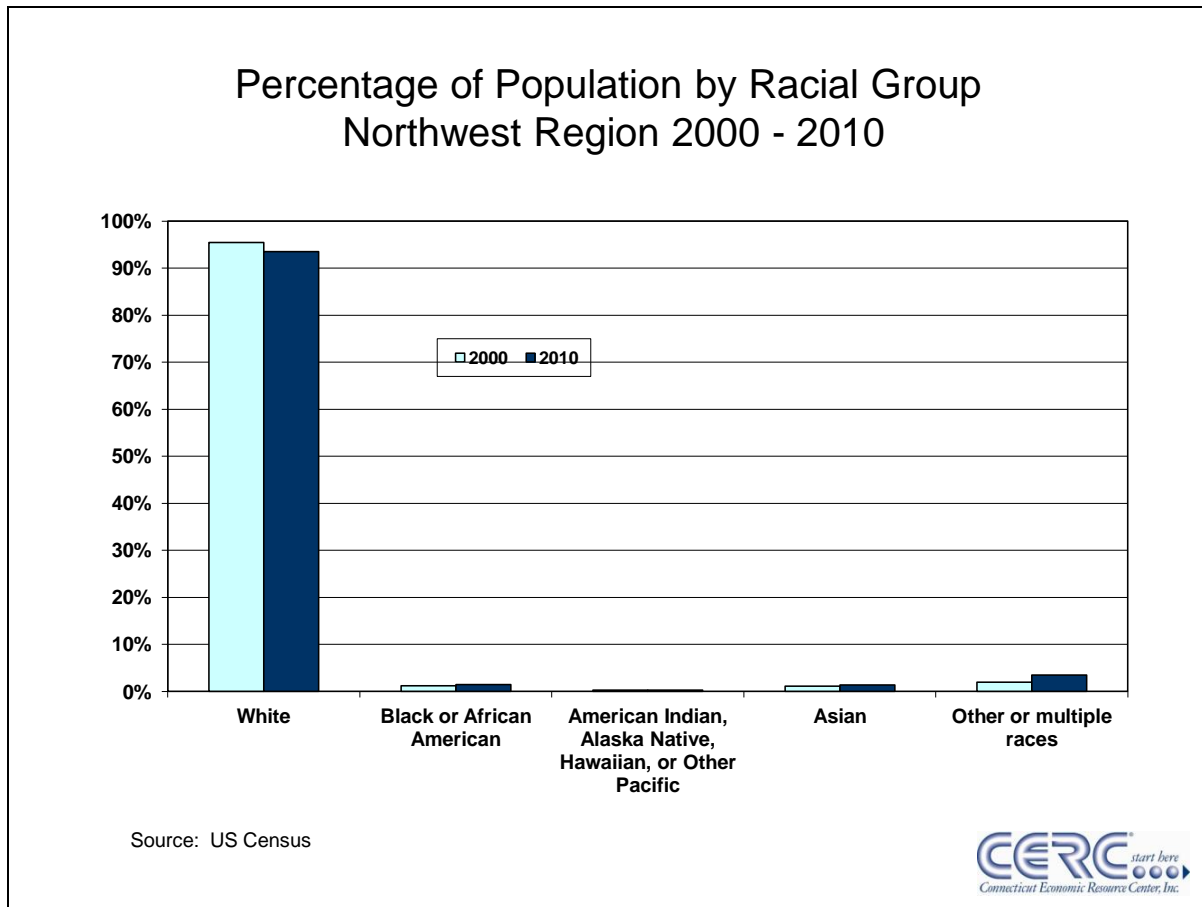


Figure 16 shows the distribution of the region's Non-White population by community in 2010. As might be expected, the two largest population centers – Torrington and Winchester – have the greatest proportion of Non-White residents.

Figure 16

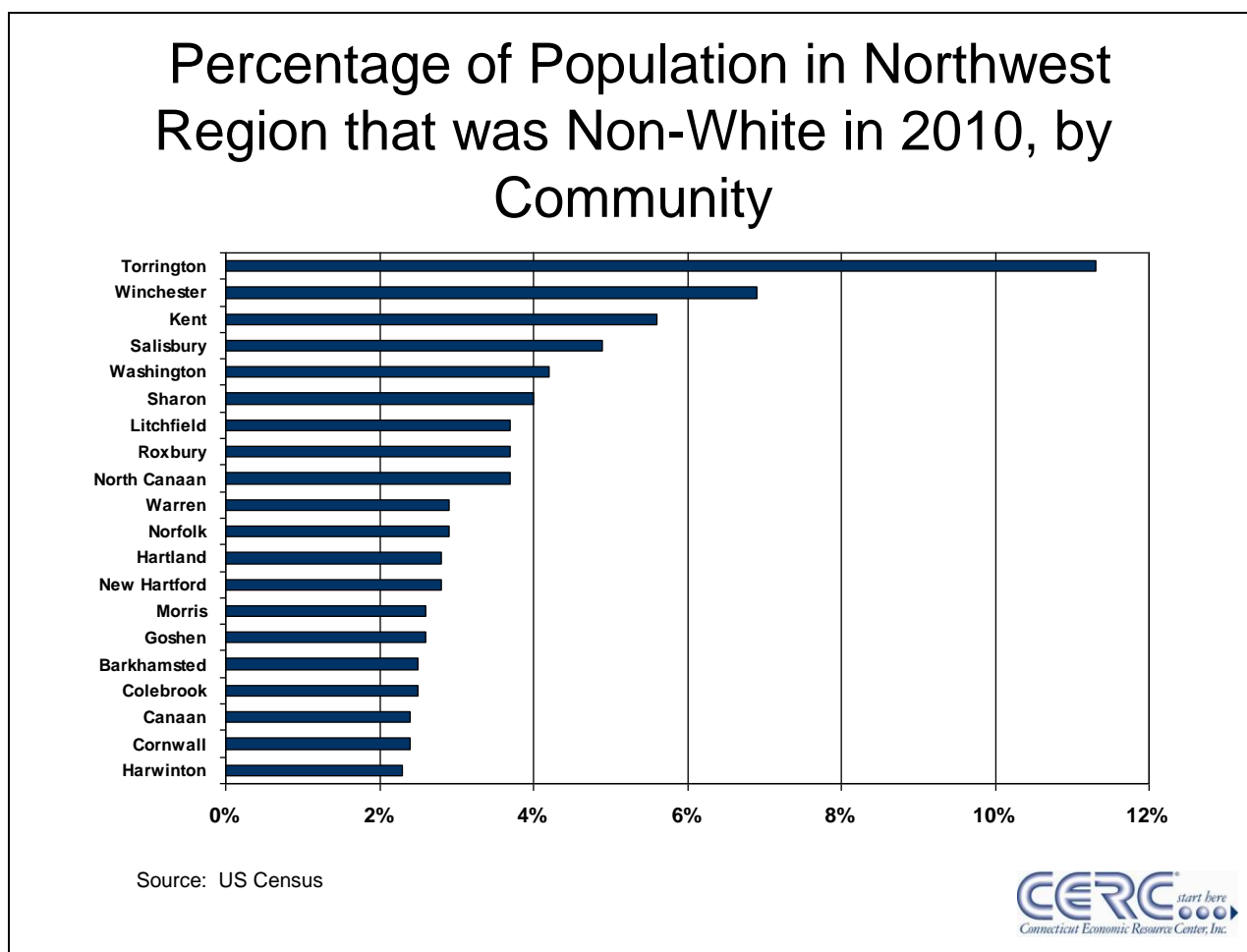
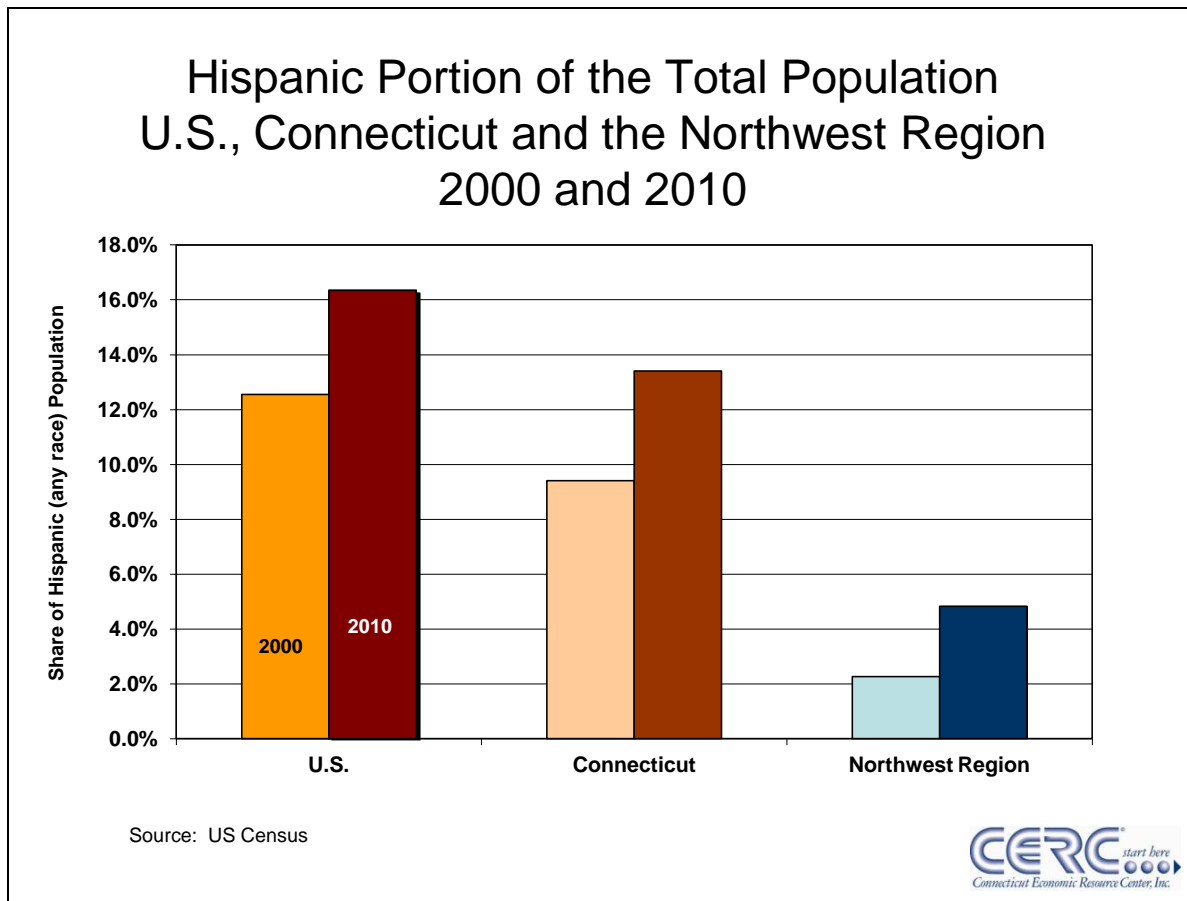


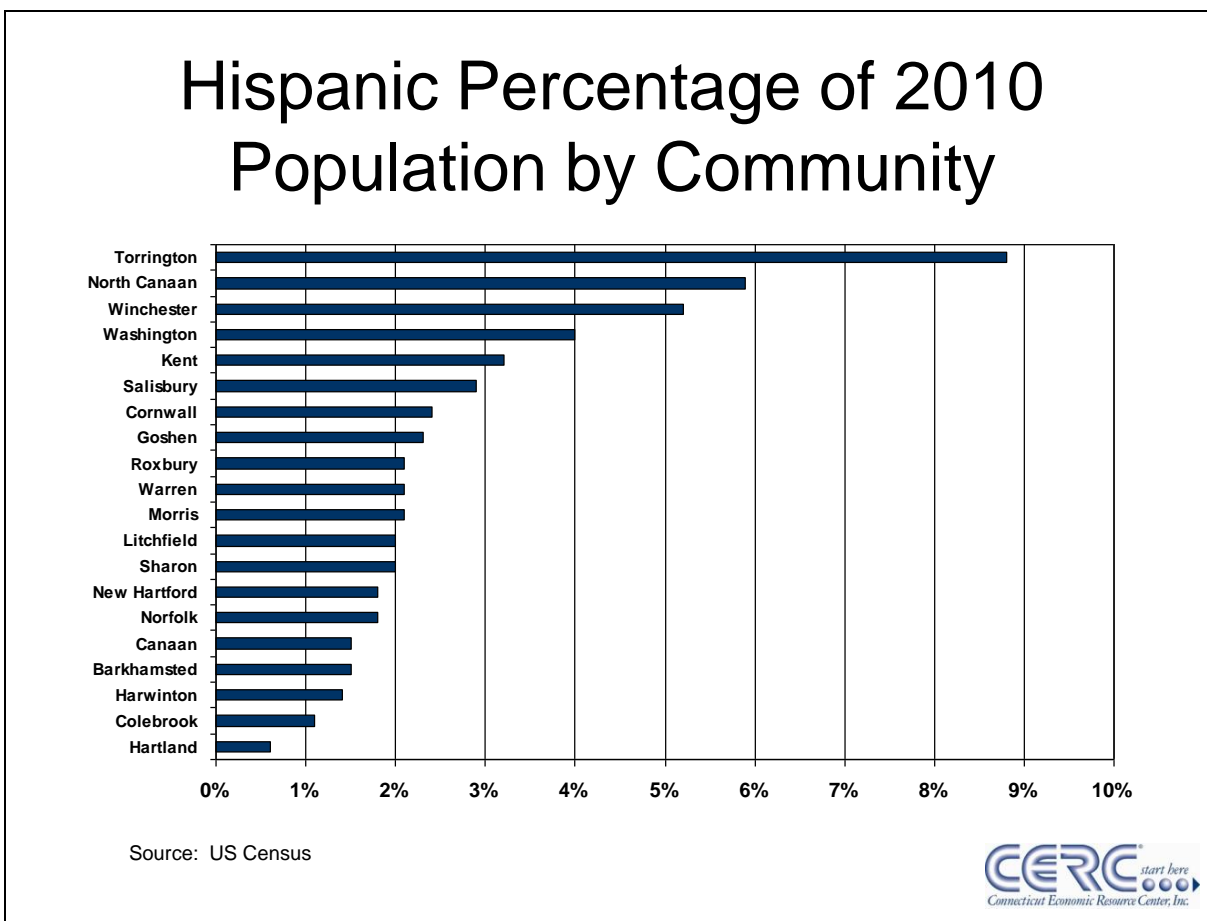
Figure 17 shows that the region's Hispanic population more than doubled between 2000 and 2010 (from 2,310 to 5,112), but remains a very small portion of the population, and is significantly less than either Connecticut or the nation.

Figure 17



As shown in Figure 18, the region's Hispanic population is scattered across the 20 communities of the region, but approximately 20 percent reside in Torrington, North Canaan and Winchester.

Figure 18



Torrington's Hispanic population grew by 5.5% percent from 2000 to 2010, the greatest growth in the Northwest region.

Implications

- The region's small, widely mixed, and broadly distributed ethnic population provides limited support for development of any ethnically-focused, niche markets.

Torrington and Winchester have the greatest potential of developing such an ethnically-focused, niche market over time if the region's minority population continues to grow.

Housing, Households and Families

This section of the Economic and Demographic Analysis of the Northwestern Connecticut Region focuses on Housing, Households and Families. Available housing can be an important factor related to attracting and retaining workers in a region.

According to the U.S. Bureau of the Census:

A **household** includes all the persons who occupy a housing unit. One person in the household is designated as the householder. A **housing unit** is a house, an apartment, a mobile home, a group of rooms, or a single room that is occupied (or if vacant, is intended for occupancy) as separate living quarters. **Separate living quarters** are those in which the occupants live and eat separately from any other persons in the building and which have direct access from the outside of the building or through a common hall. The occupants may be a single family, one person living alone, two or more families living together, or any other group of related or unrelated persons who share living arrangements. (People not living in households are classified as living in group quarters.)

A **family** consists of a householder and one or more other people living in the same household who are related to the householder by birth, marriage, or adoption.

A **family household** may also contain people not related to the householder. A **nonfamily household** consists of a householder living alone or with nonrelatives only, for example, with roommates or an unmarried partner.

A **group quarters** is a place where people live or stay, in a group living arrangement, that is owned or managed by an entity or organization providing housing and/or services for the residents. This is not a typical household-type living arrangement. These services may include custodial or medical care as well as other types of assistance, and residency is commonly restricted to those receiving these services. People living in group quarters are usually not related to each other. Group quarters include such places as college residence halls, residential treatment centers, skilled nursing facilities, group homes, military barracks, correctional facilities, and workers' dormitories.

As shown in Figure 19, the Northwest Connecticut region has a very high share of its population living in households (as opposed to group quarters) and that share remained essentially the same (98 percent) between 2000 and 2010. The remainder of the population lives in group quarters. The region's household population slightly exceeds that of the State and nation.

Figure 19

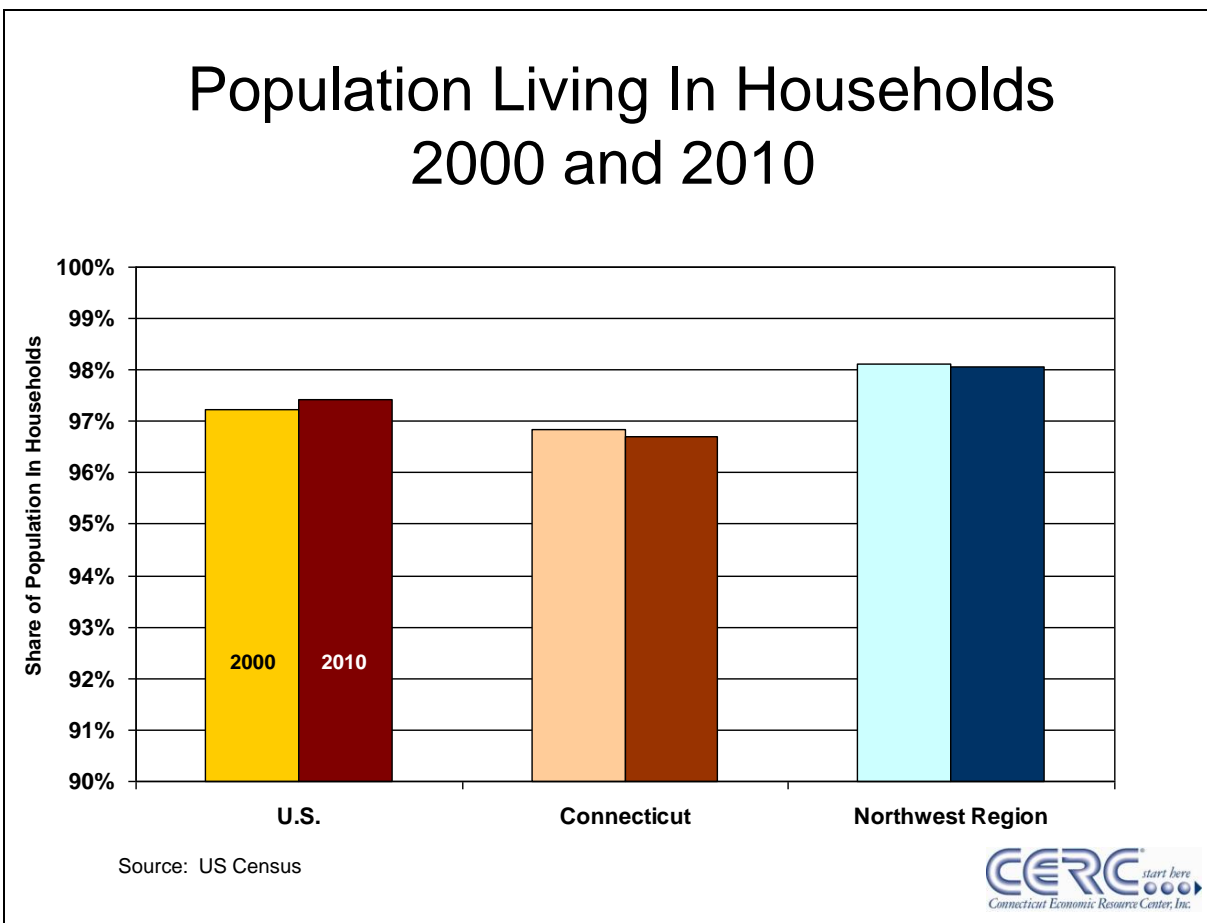


Figure 20 shows that, overall, the percent of the region's residents living in households increased more than 6 percent between 2000 and 2010, a greater growth than the State, but less than the nation.

Figure 20

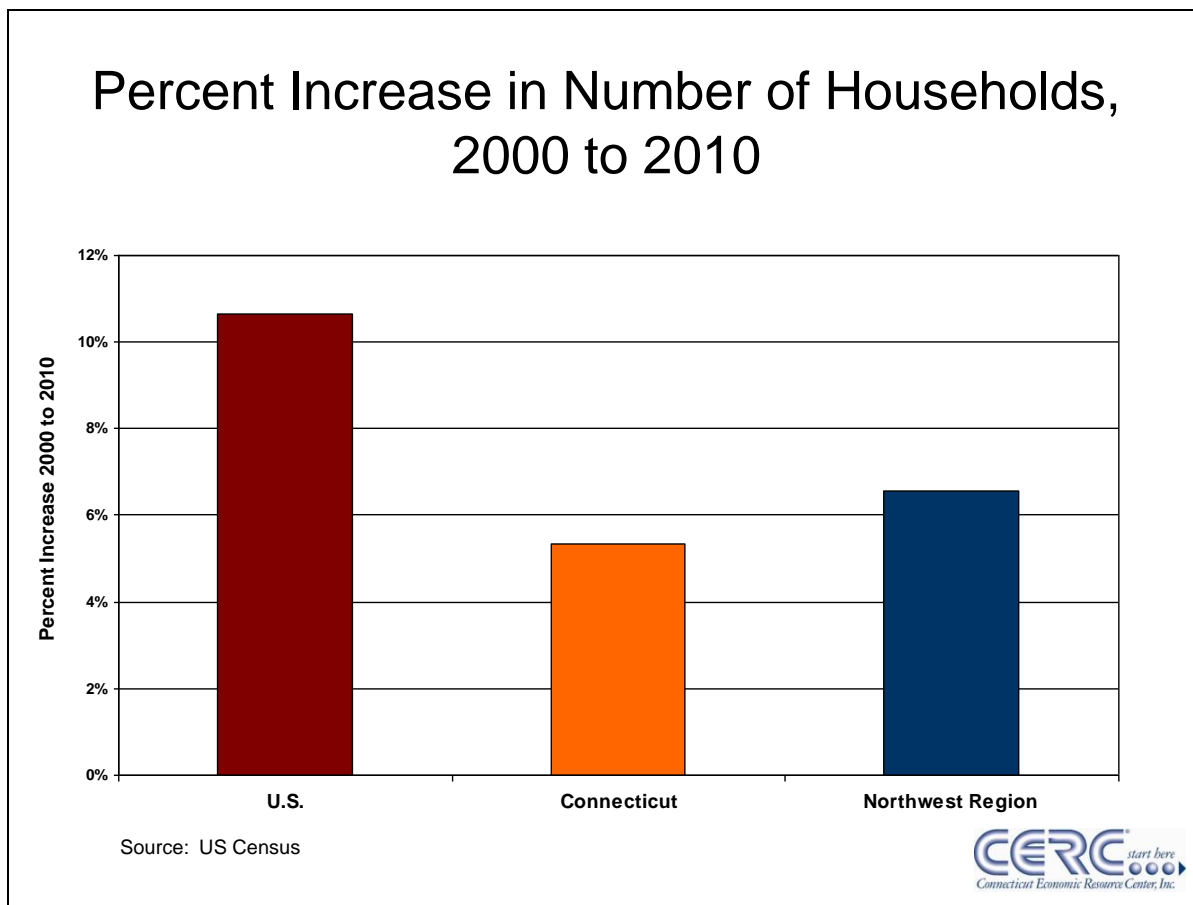


Figure 21 shows how the Region's population in households differs by community and has changed during the 2000 – 2010 decade. While all communities in the region have 93 percent or more of their residents in households, many are at or near 100 percent. North Canaan, Sharon and Norfolk had the most noticeable increase in the share of population in households, while Kent, Salisbury and Colebrook had the most noticeable declines. Figure 22 shows the changes in population living in households by community during the 2000 – 2010 decade.

Figure 21

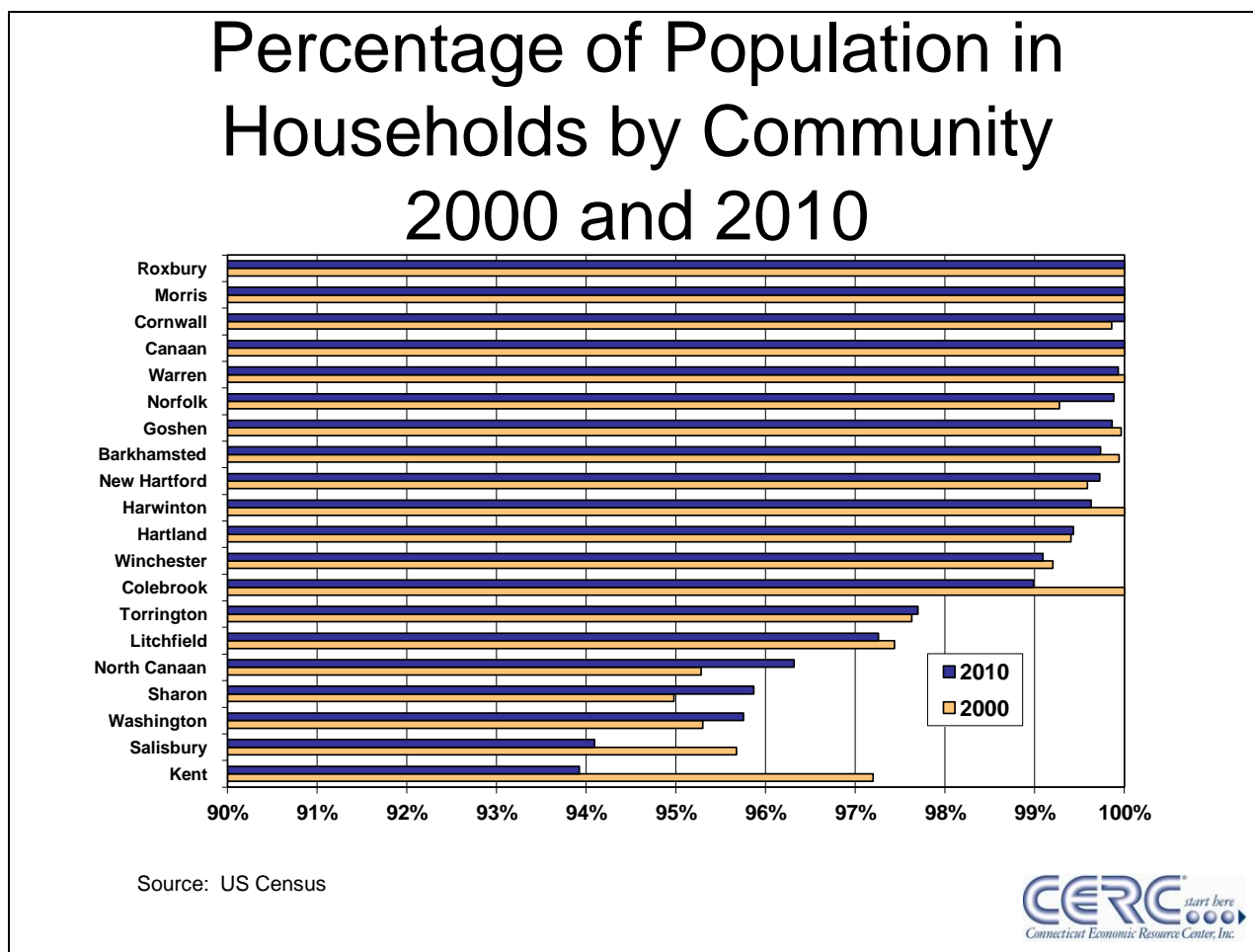


Figure 22 shows the percentage change in the number of households, by community in the region, between 2000 and 2010. (Prior Figures dealt with the percentage of the population living in households.) The only community in the region that had a decline in the number of households was Salisbury; Canaan, Warren, and New Hartford had the most noticeable growth in the number of households. Even communities with little or no population growth (see Figure 8) experienced an increase in the number of households because of the decline in average household size (see Figure 28).

Figure 22

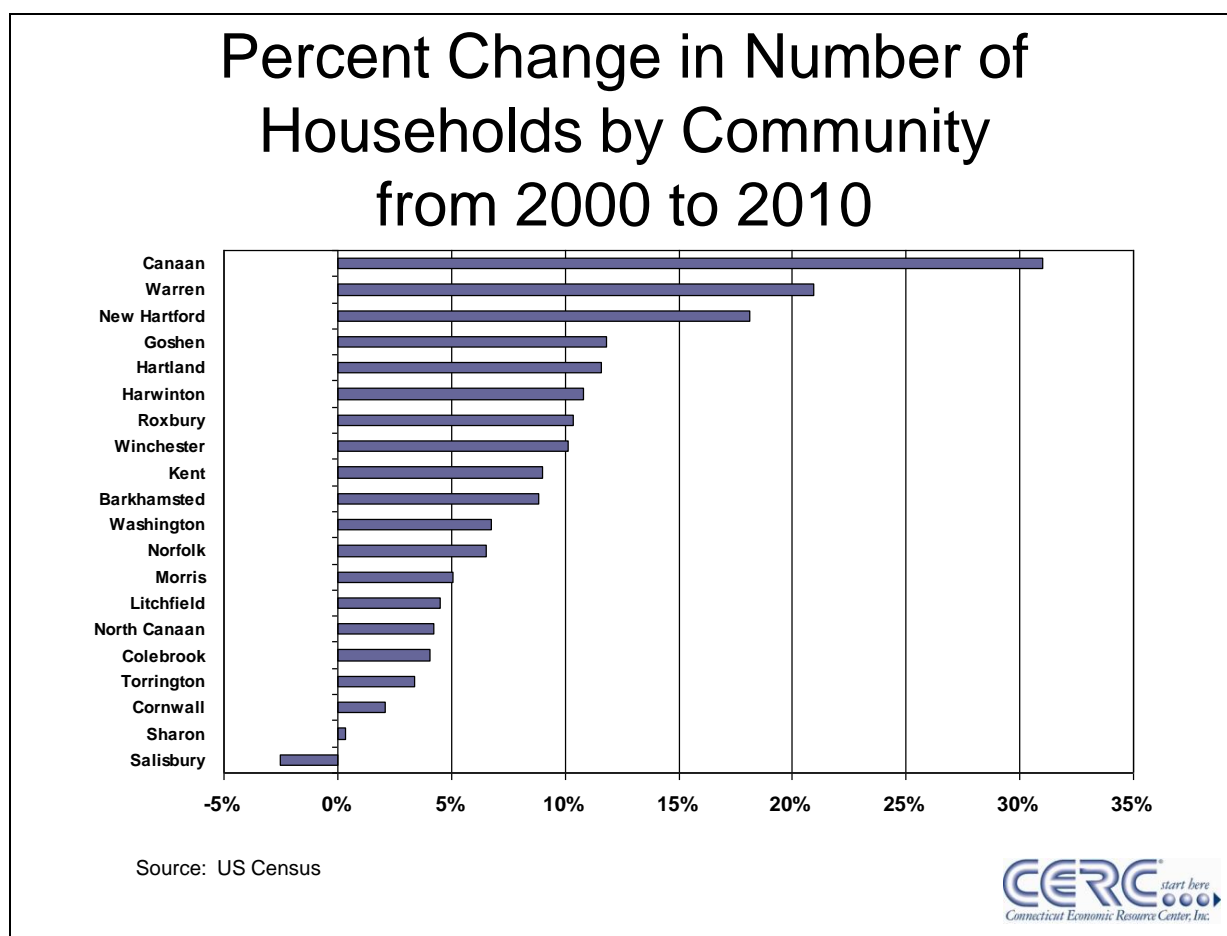


Figure 23 provides data on the non-family (or single person) households in the region, and how the region compares with the State and nation in that category. Single person households increased from about 32% to 33.5% nationally, from 32.3% to 33.7% in Connecticut, and from nearly 33% to 34.8% in the Northwest region. The region has been growing in its proportion of single person households, at about the same rate as the State and nation.

Figure 23

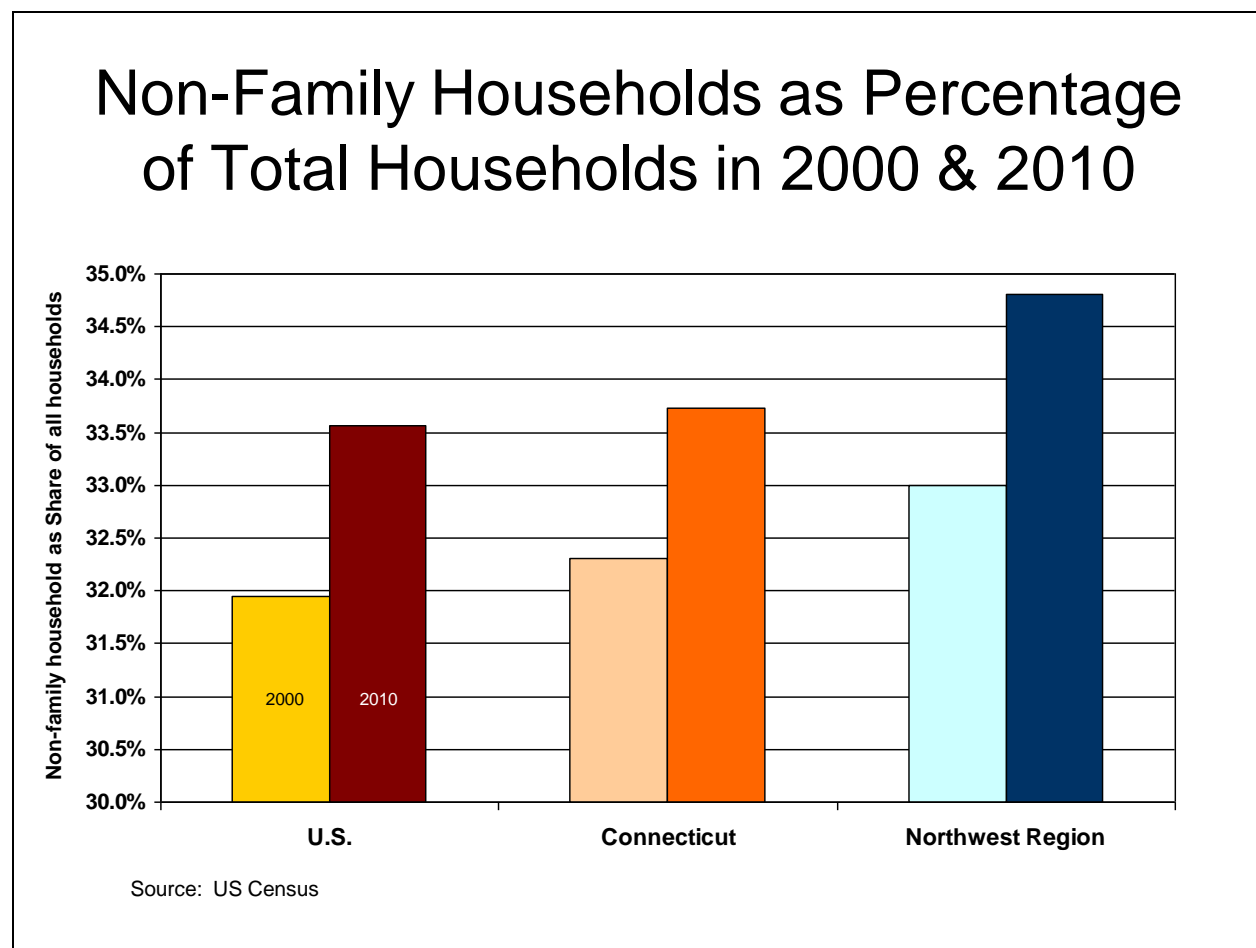


Figure 24 shows how non-family (single person) households (as a percentage of all households) has changed between 2000 and 2010 by community. Figure 25 on the following page quantifies the size of the change during that period. Most communities had a growth in single person households over the decade, with Canaan and North Canaan experiencing the greatest increases (13.1 percent and 5.6 percent respectively). Warren, Cornwall and Colebrook experienced declines in their share of single person households, albeit small declines (2.3 percent or less).

Figure 24

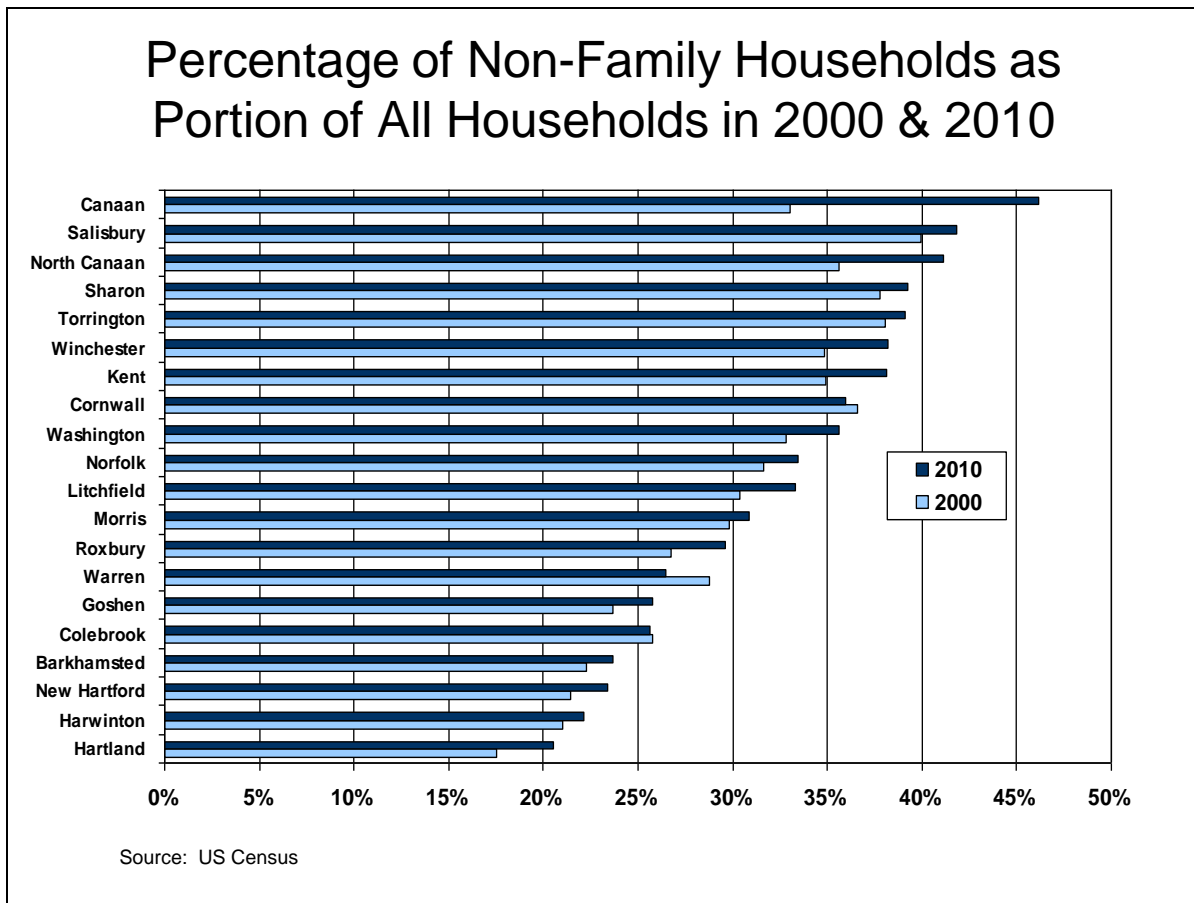


Figure 25 shows clearly that the region has a significant portion of its residents living in households comprised of husband-wife families, although that portion has declined between 2000 and 2010. While the region's share of this type of household was higher than the State and nation in both 2000 and 2010, the region lost a slightly higher percentage (3.6 percent) over the decade than the nation (3.3 percent) or State (3.0 percent).

Figure 25

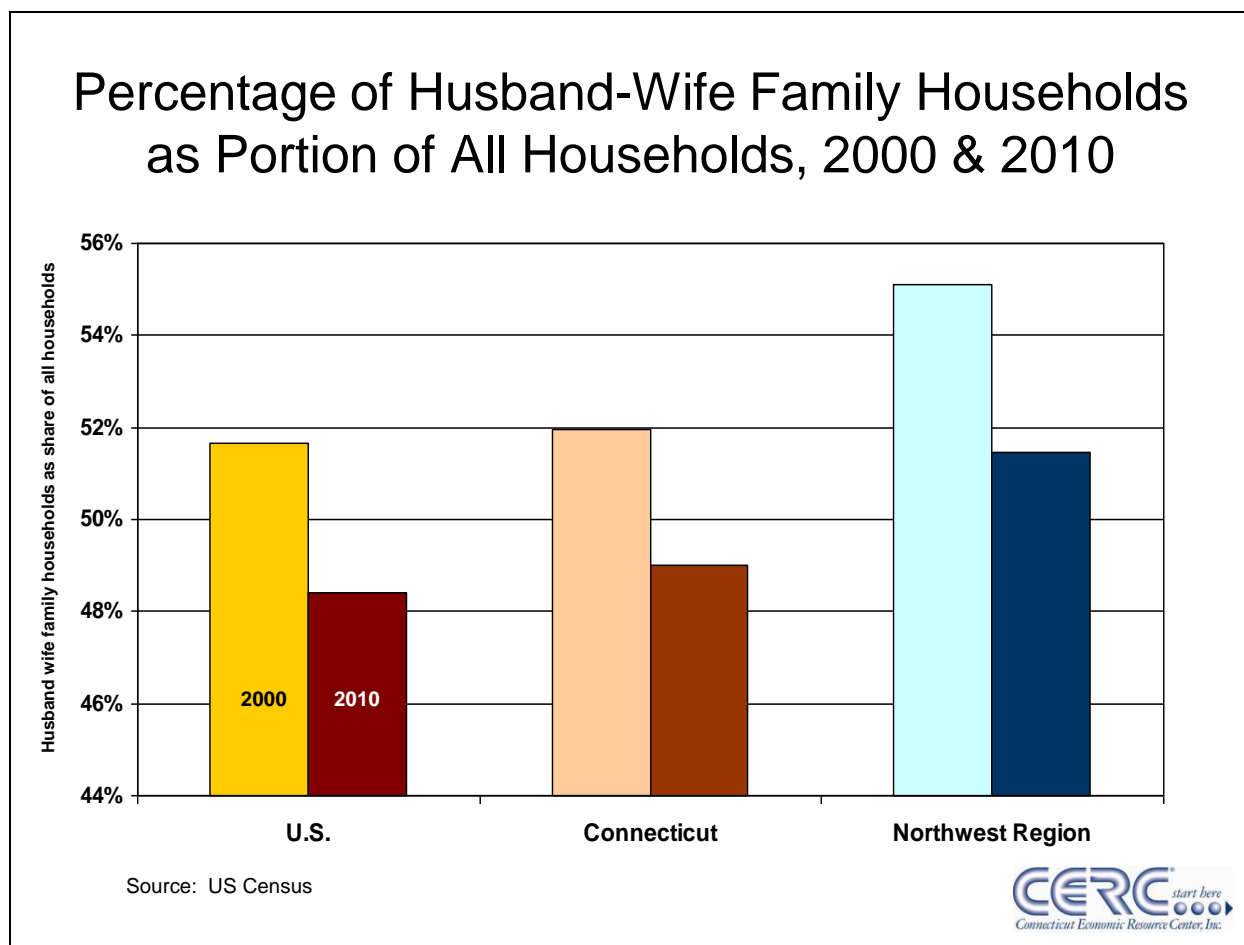


Figure 26 shows how the share of husband-wife households (as a percentage of all households) has changed between 2000 and 2010 by community. Figure 28 quantifies what the size of the change was during that period. Most communities had a decline in husband-wife households over the decade, with Canaan and North Canaan experiencing the greatest decreases (13.5 percent and 8.8 percent respectively). Warren and Cornwall experienced increases in their share of single person households, albeit small ones (2.3 percent or less).

Figure 26

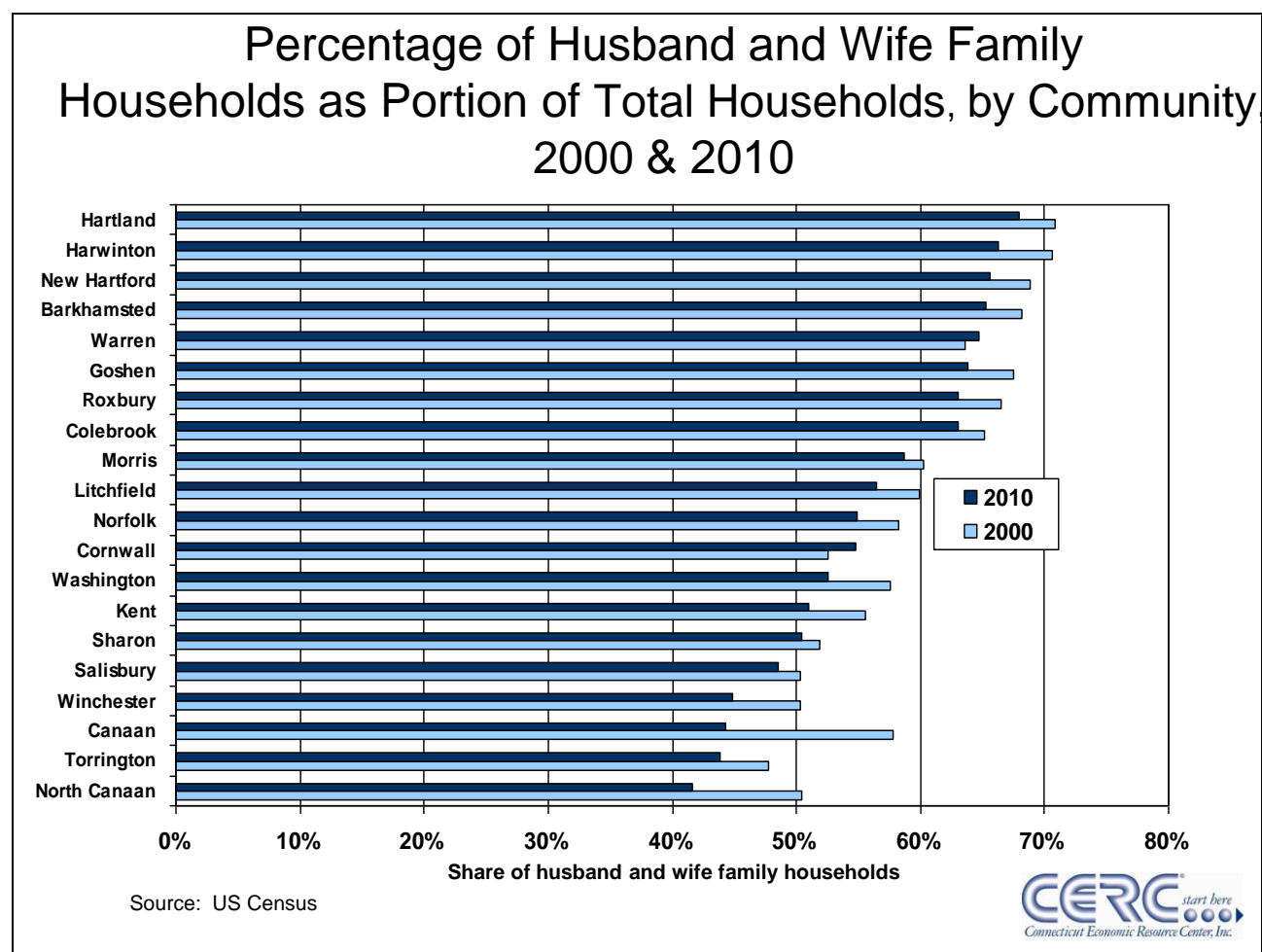
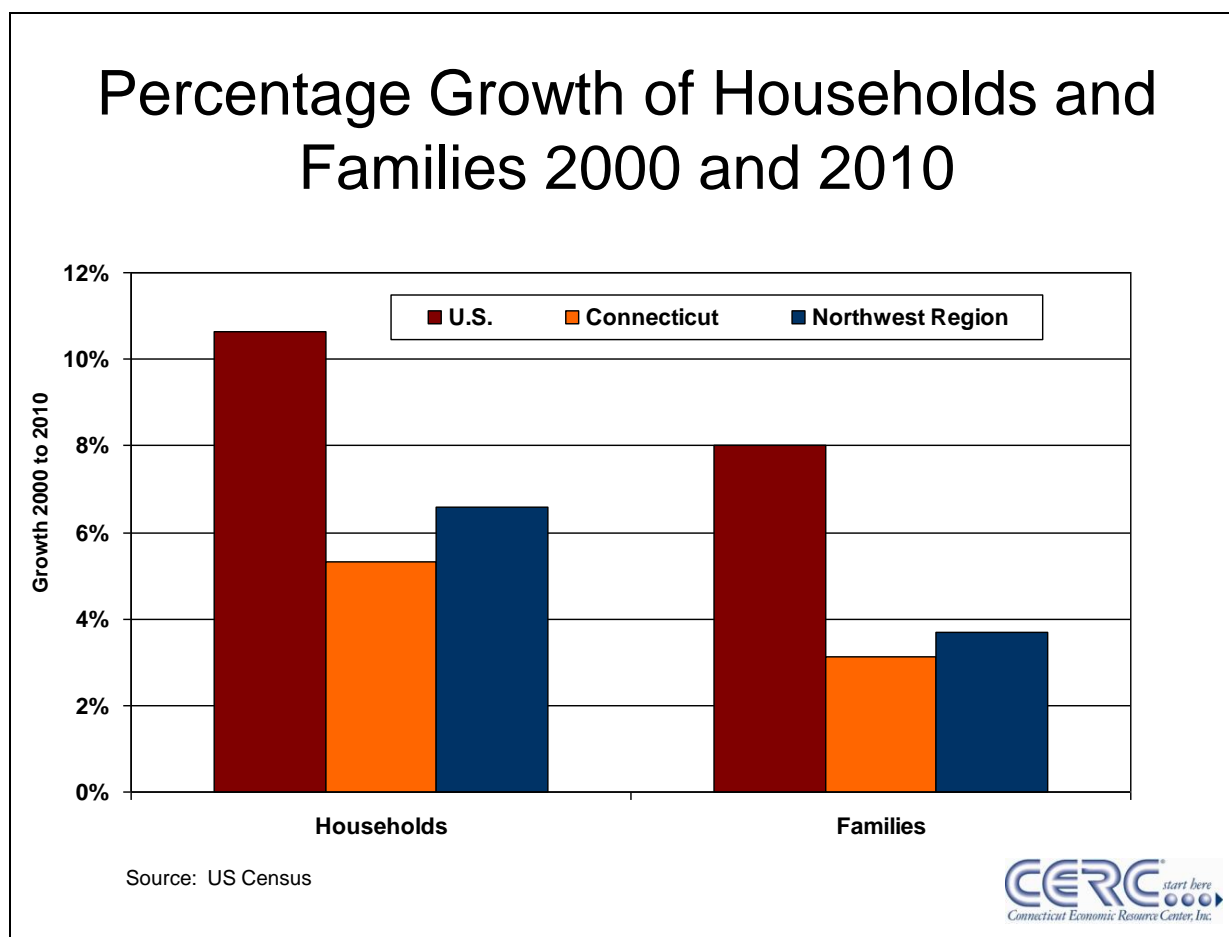


Figure 27 shows the percentage growth between 2000 and 2010 in both households and families in the region, compared with the State and nation. While all experienced growth in both categories, both Connecticut and the region lagged the country in both categories. This reflects the State's slow rate of population growth, although the region has had a slightly higher rate of household and family formation than the State.

Figure 27



Reflecting the increase in single-person households shown in Figure 28 and the decline in husband-wife households shown Figure 26, the region's average household size dropped between 2000 and 2010, which is consistent with the occurrence of both the State and nation. The region had a smaller average household size than that either the State or nation in both 2000 and 2010. The region's 2010 average household size was 2.48. However, the region's drop of 0.10 between 2000 and 2010 was greater than the State and nation, which both had a drop of 0.01.

Figure 28

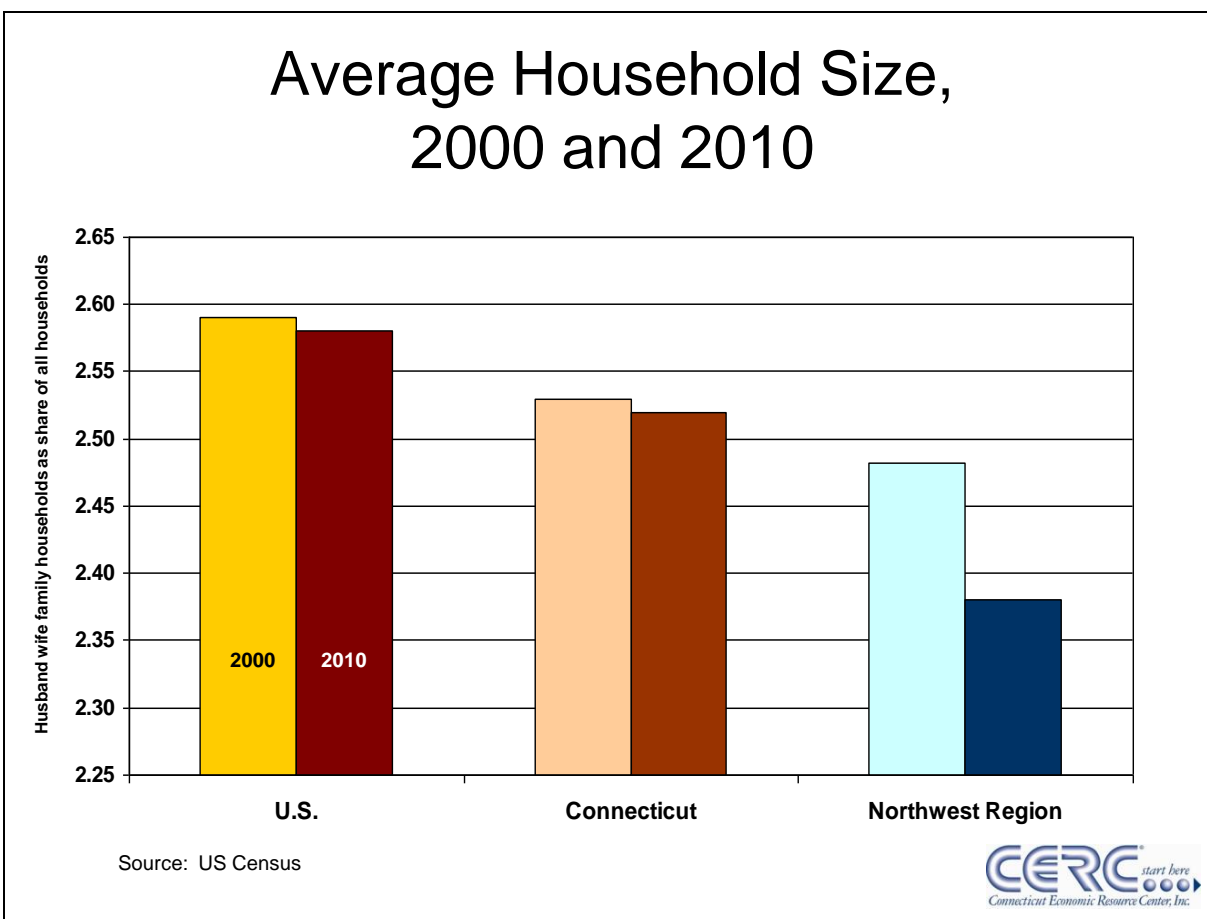


Figure 29 shows the region's 2010 household size by community. Four communities – Hartland, New Hartford, Barkhamsted, and Harwinton – had larger household sizes than the regional average of 2.48. Salisbury, Canaan and Sharon had average household sizes well below the regional average.

Figure 29

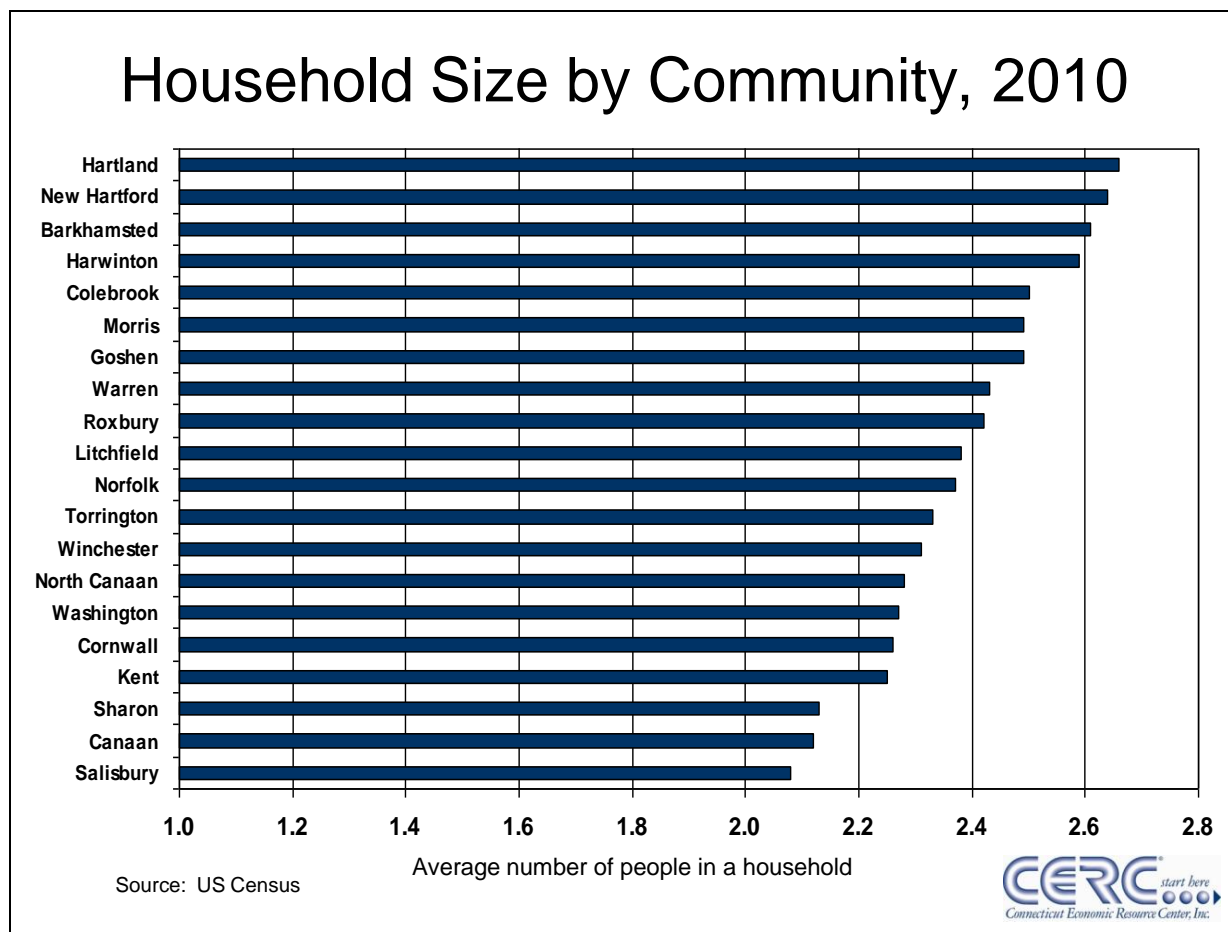
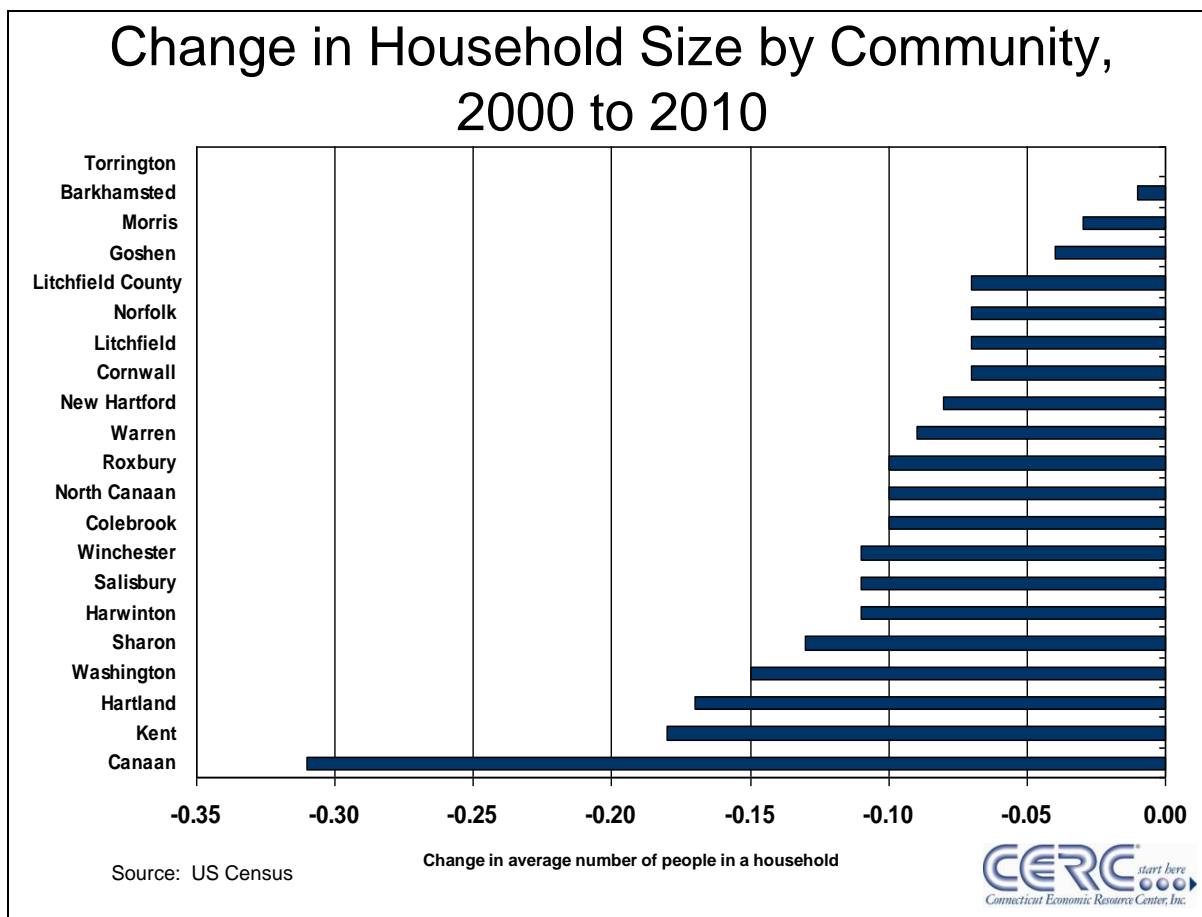


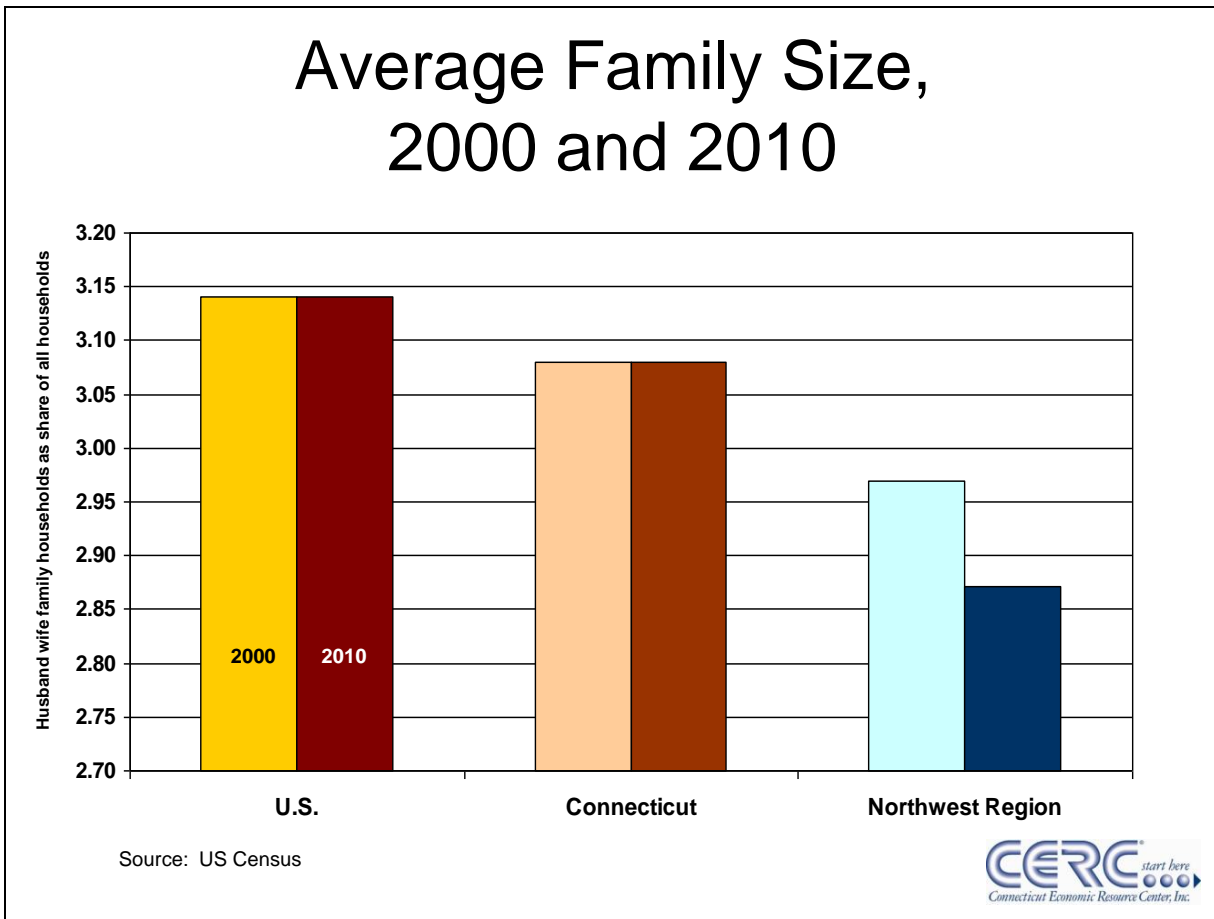
Figure 30 shows the change in average household size between 2000 and 2010 by number of people per household in each community. None of the region's communities grew in household size; Torrington stayed the same between 2000 and 2010. Canaan had the most noticeable drop in household size, far greater than any other community in the region.

Figure 30



While Figures 28 – 30 provided data on households in the region, slide 31 shows the average family size. (See the beginning of this section for U.S. Census definitions of households and families.) As with household size, the average size of families in the region declined between 2000 and 2010, while according the Census Bureau’s American Fact Finder, the U.S. and Connecticut average family size stayed the same.

Figure 31



Because of the declining household size, but increasing population in the region, the percent of occupied housing increased by more than 6 percent between 2000 – 2010, as shown in Figure 32. This growth was slightly higher than that of the state's but less than that of the nation. However, as shown in Figure 33, the region still had a higher vacancy rate in 2010 than either the state or nation.

Figure 32

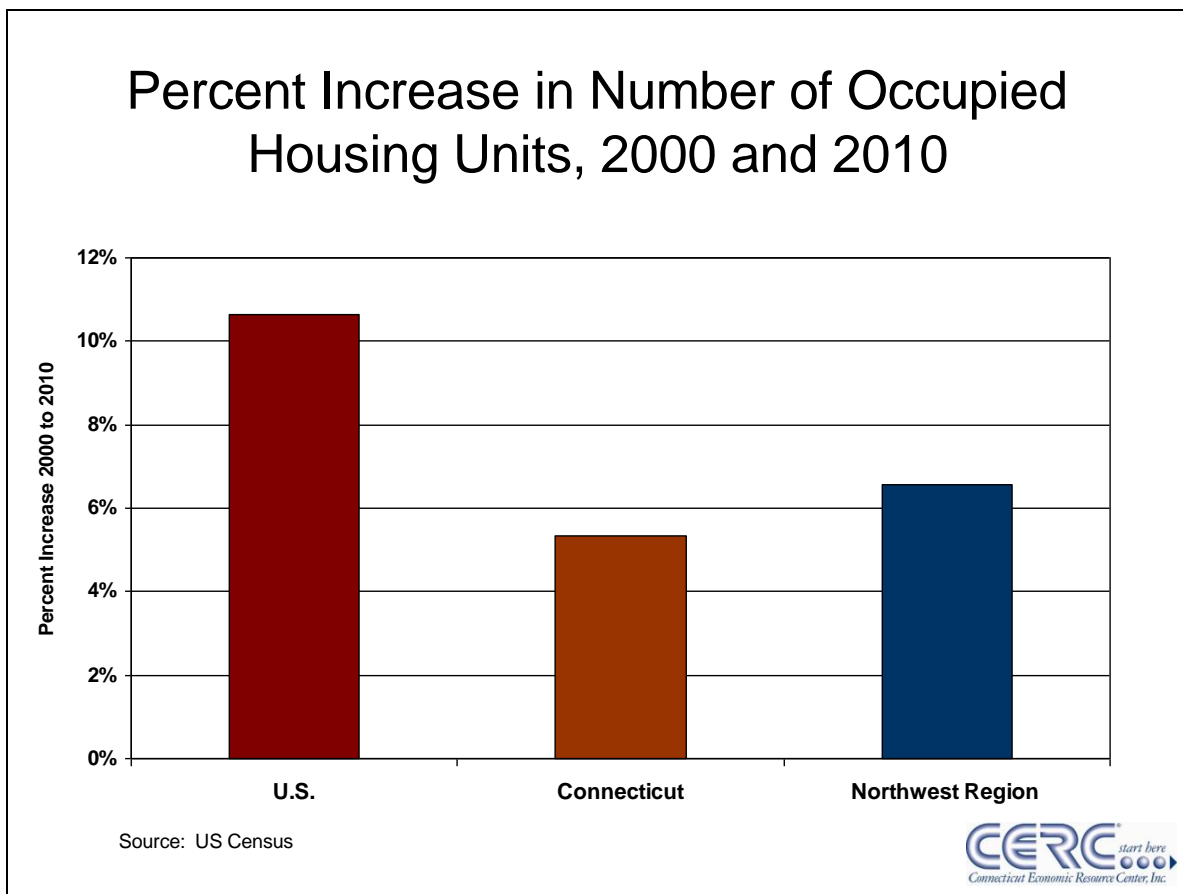


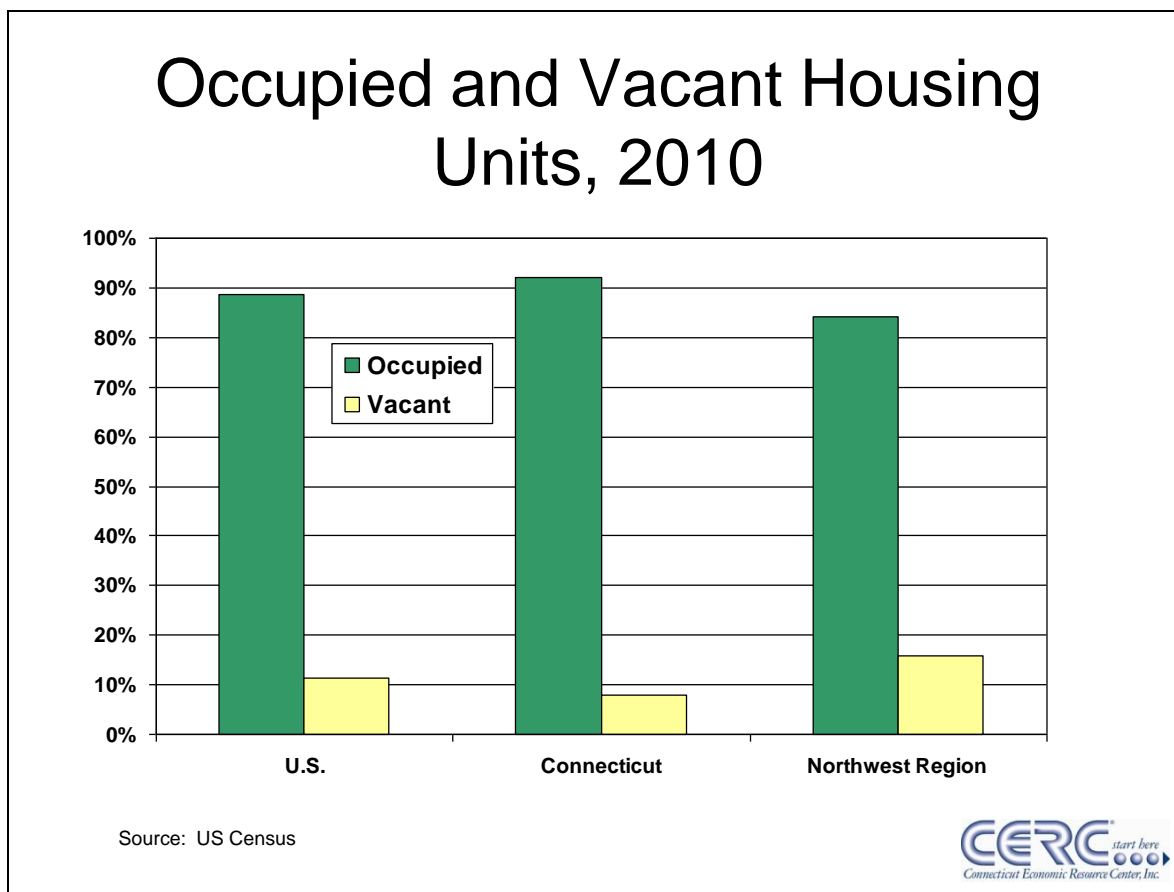
Figure 33

Figure 34 compares the region's breakdown of owner and renter occupied housing units with Connecticut and the United States and shows that the region is more heavily owner occupied. The lack of rental housing can be an obstacle for attracting and retaining younger workers or others who are unable to cover the down-payment or occupancy costs of owning a house.

Figure 34

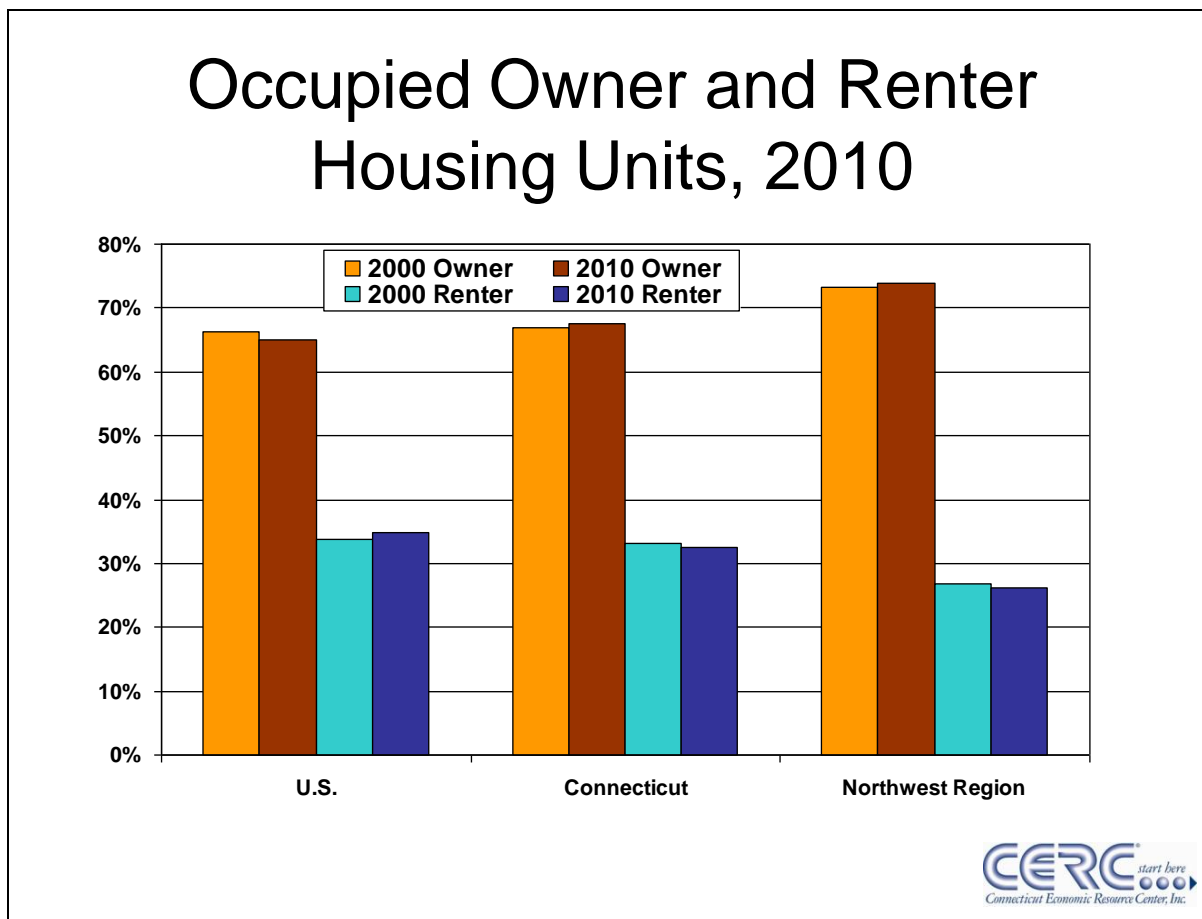


Figure 35 shows that rental occupancy is not evenly distributed throughout the region, nor is it correlated with community populations shown in Figure 4.

Figure 35

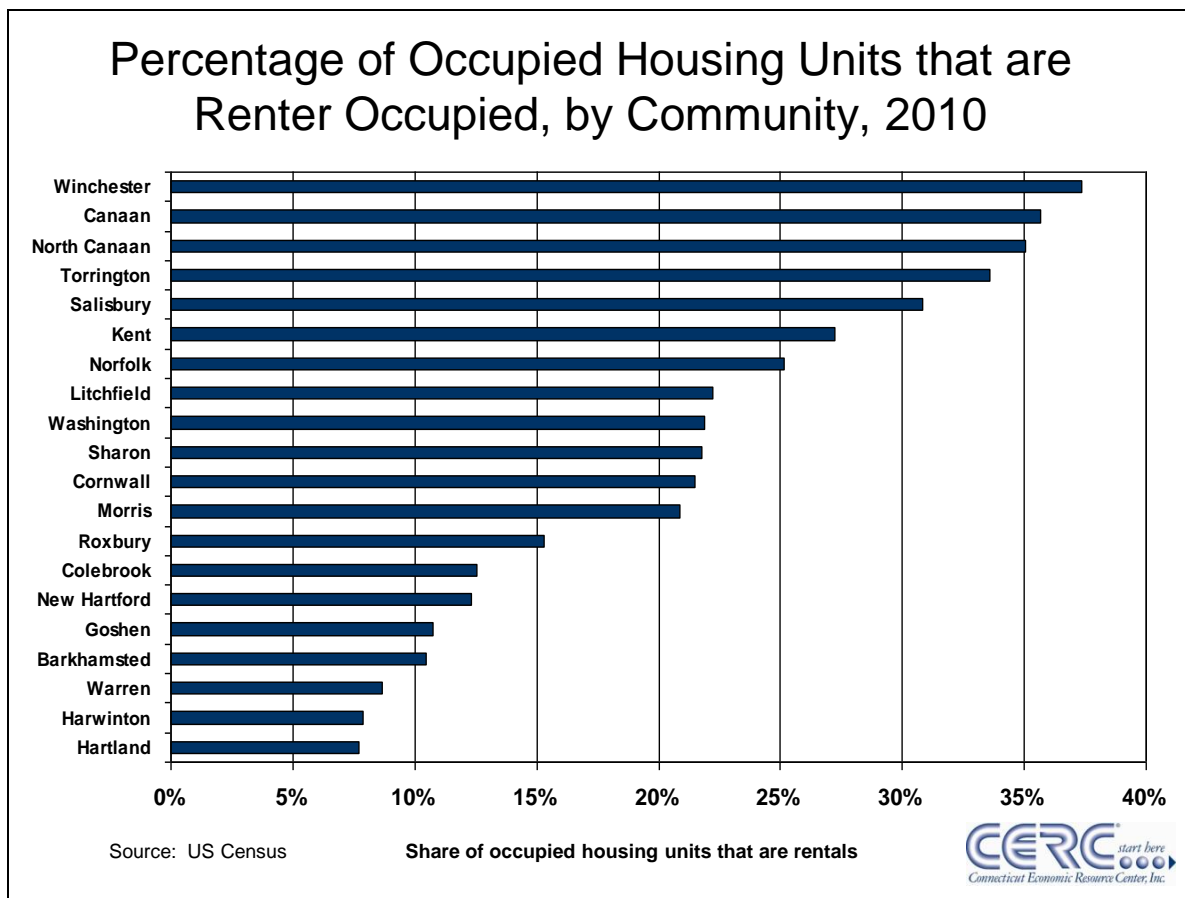


Figure 36 compares the median housing value of the region's housing in 2010 by community and with the State and nation. All of the region's communities have a median housing value higher than that of the country as a whole and 14 exceed the state's median housing value. Five of the six communities with a median housing value less than the state average are in the LHCEO planning district. The relatively high cost of housing in a high cost state has important implications for the region in being able to provide affordable housing for the region's workforce.

Figure 36

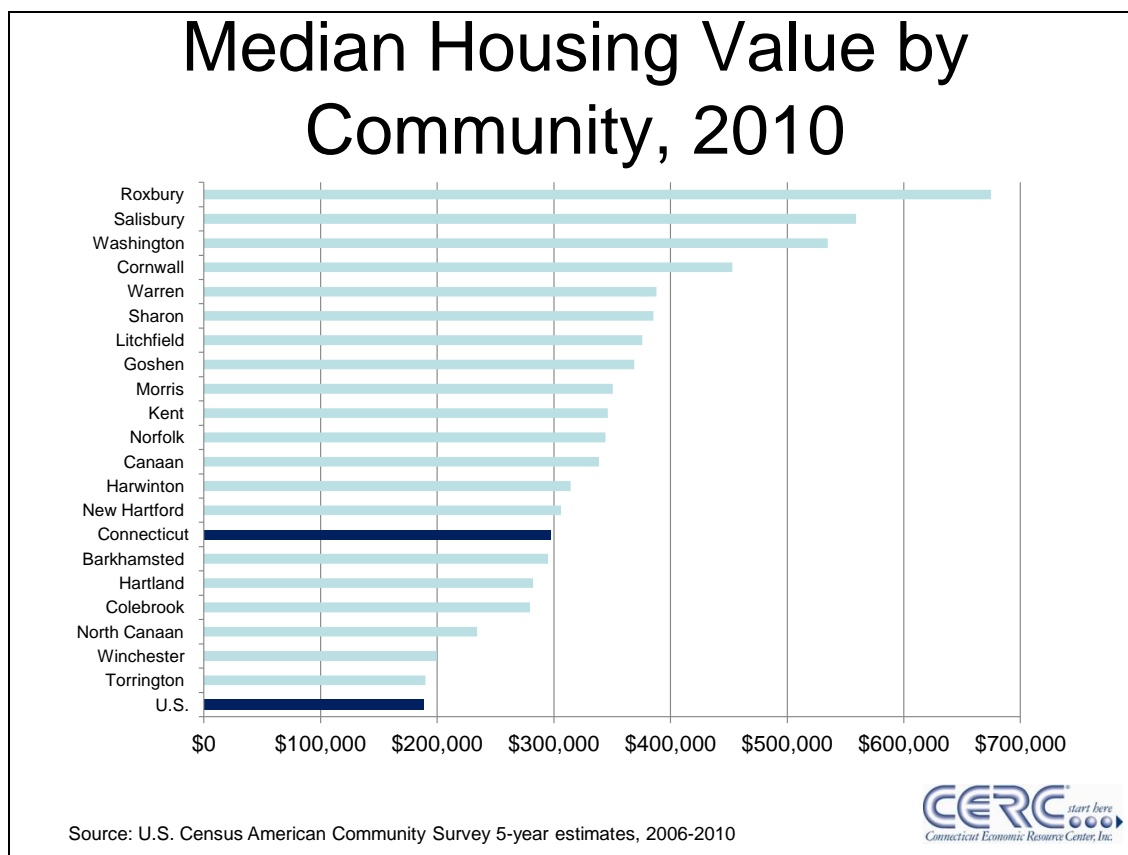
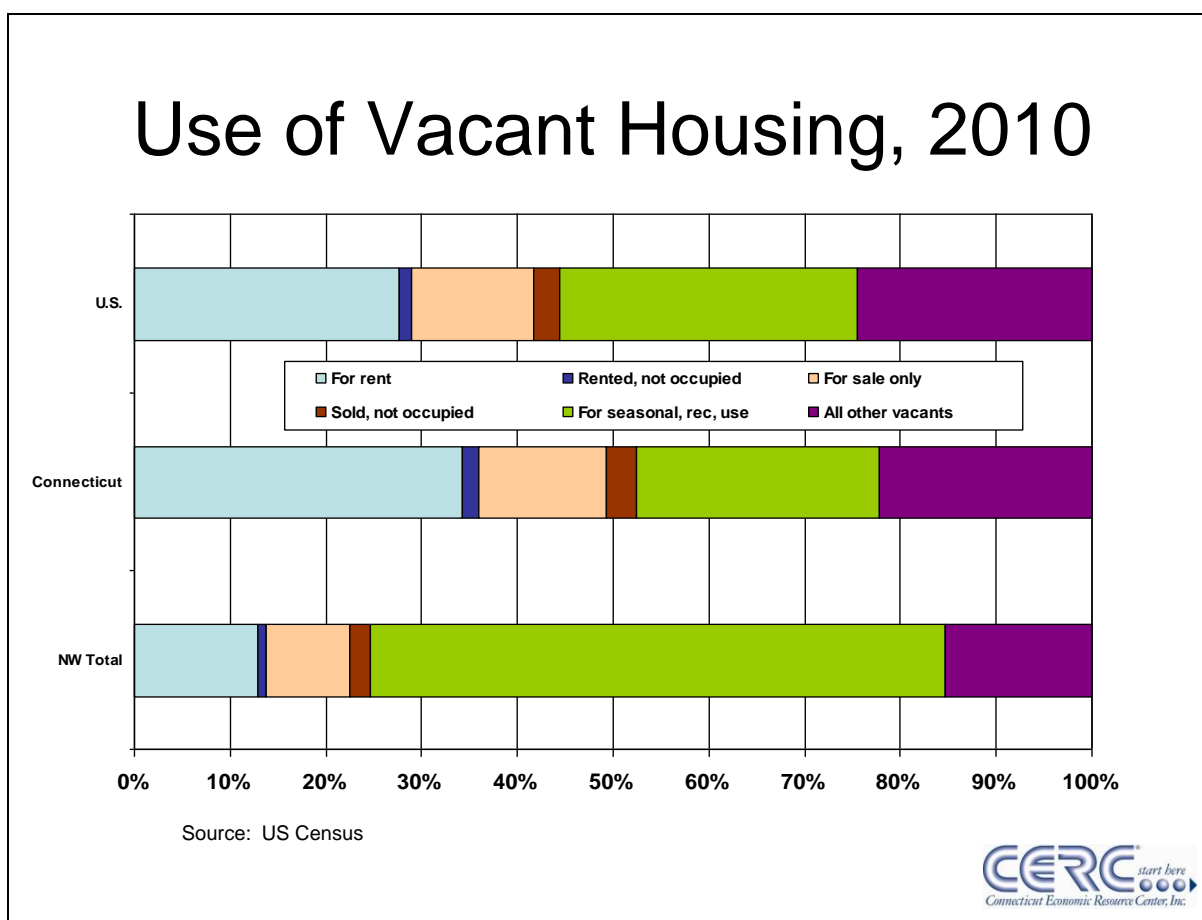


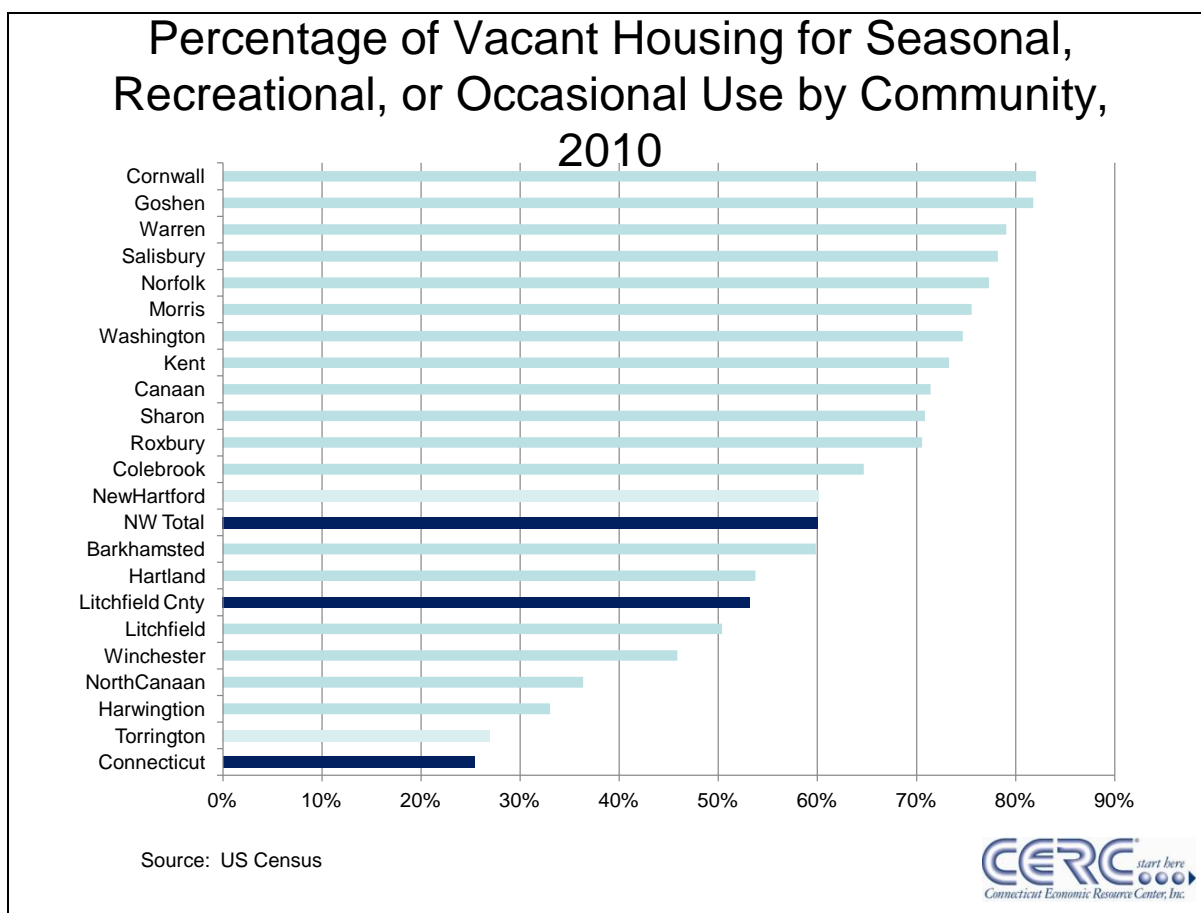
Figure 37 compares regional data with that of the State and nation on the intended use of vacant housing units in 2010. Figure 37 clearly demonstrates both that the region has a smaller portion of its housing stock available as rental units and that it has a significantly higher portion of its vacant units intended for seasonal or recreational use – the region’s part-time, second home residents.

Figure 37



While there are significant differences among the region's communities in the percentage of vacant housing units being held for seasonal, recreational, or occasional use, the entire region exceeds the statewide average for this category and the majority of communities exceed the Litchfield County average as shown in Figure 38. There is also a difference between the communities of the LHCEO and NWCCOG planning regions with 8 of the 9 communities of the NWCCOG region in the top 10 communities with the highest proportion of units vacant because they are for seasonal, recreational or occasional use.

Figure 38



Implications

- Growth in the number of households and/or families can indicate a growing need for locally based retail or service establishments and the opportunity to create those types of businesses in growing communities.
- Growth in the number of single-person households would suggest a different market than for family households, with the type of products or services needed varying by age group.

- The region's abundance of vacant dwelling units for seasonal or recreational use hides a small inventory of available rental units.
- The region's lack of rental housing can be an obstacle for attracting and retaining younger workers or others who are unable to cover the down-payment or occupancy costs of owning a house.
- Information on Household and Family composition can be important data in identifying retail or service needs and opportunities. As recognized in ESRI's Tapestry Segmentation Manual (see http://www.esri.com/data/esri_data/tapestry for an interactive "poster" summarizing ESRI's 65 market segments), different consumer or lifestyle groups have different characteristics and purchasing preferences and patterns. This type of market segmentation is frequently used by merchants – particularly major chains) in selecting new store locations. Without taking income into account (see the section on Income later in this analysis), but factoring in the age and housing occupancy breakdowns discussed above, a majority of the Northwestern Connecticut population may fall into a combination of three Tapestry Lifestyle Groups in the ESRI Tapestry Manual: Traditional Living, Factories and Farms, and Senior Styles.

The Traditional Living group is described in the manual as follows:

The four segments in *Traditional Living* convey the perception of real middle America—hardworking, settled families. The group's higher median age of 38 years also conveys their lifestage—a number of older residents who are completing their child-rearing responsibilities and anticipating retirement. Even though they're older, many still work hard to earn a modest living. They typically own single-family homes in established, slow-growing neighborhoods. They buy standard, four-door American cars, belong to veterans' clubs and fraternal organizations, take care of their homes and gardens, and rely on traditional media such as newspapers for their news.

The Factories and Farms group is described in the manual as follows:

The segments in the *Factories and Farms* summary group represent rural life—from small towns and villages to farms. Employment in manufacturing and agricultural industries is typical in these small, settled communities across America's breadbasket. Population change is nominal, and the profile is classic. Most households are families, either married couples or married couples with children. By age, the residents of *Factories and Farms* mirror the U.S. distribution, with slightly more retirees. Median household income is a bit lower, almost \$40,524, but so is the home value of \$92,572. Most own their homes. Their lifestyle reflects their locale, emphasizing home and garden care, fishing and hunting, pets, and membership in local clubs.

The Senior Styles group is described as follows:

More than 14.4 million households in the nine *Senior Styles* segments comprise one of the largest LifeMode summary groups. As the U.S. population ages, two of the fastest growing American markets are found among *The Elders* and the *Silver and Gold* segments. *Senior Styles* segments illustrate the diversity among today's senior markets. Although incomes within this group cover a wide range, the median is \$45,396, attributable mostly to retirement income or Social Security payments. Younger, more affluent seniors, freed of their child-rearing responsibilities, are traveling and relocating to warmer climates. Settled seniors are looking forward to retirement and remaining in their homes. Residents in some of the older, less privileged segments live alone and collect Social Security and other benefits. Their choice of housing depends on their income. This group may reside in single-family homes, retirement homes, or highrises. Their lifestyles can be as diverse as their circumstances, but senior markets do have common traits among their preferences. Golf is their favorite sport; they play and watch golf on TV. They read the newspaper daily and prefer to watch news shows on television. Although their use of the Internet is nearly average, they are more likely to shop through QVC than online.

These descriptions should be useful to the Northwest Connecticut region in identifying the types of retailers or service providers that would have the most patronage from residents.

- The relatively high cost of housing in a high cost state, has important implications for the region in being able to provide affordable housing for the region's workforce.
- The high proportion of vacant dwelling units in the region because they are used for seasonal, recreational, or occasional occupancy has a bearing on tourism, retail and affordable housing opportunities. There is a noticeable difference between the LHCEO and NWCCOG planning regions in this type of housing.

Educational Attainment

Figures 39 – 43 present information on the educational attainment of Northwest Connecticut's residents compared with those of Connecticut and the nation. Educational attainment is a major evaluation characteristic of companies assessing the skills level of a potential location.

Figure 39 shows that in 2010, 58 percent of the region's residents (25 years of age or older – the age group by which most education is completed) had some level of education beyond high school, with 19 percent with some college but no degree, 9 percent with Associate's Degrees, 18 percent with Bachelor's Degrees, and 12 percent with an advanced degree of some type.

Figure 39

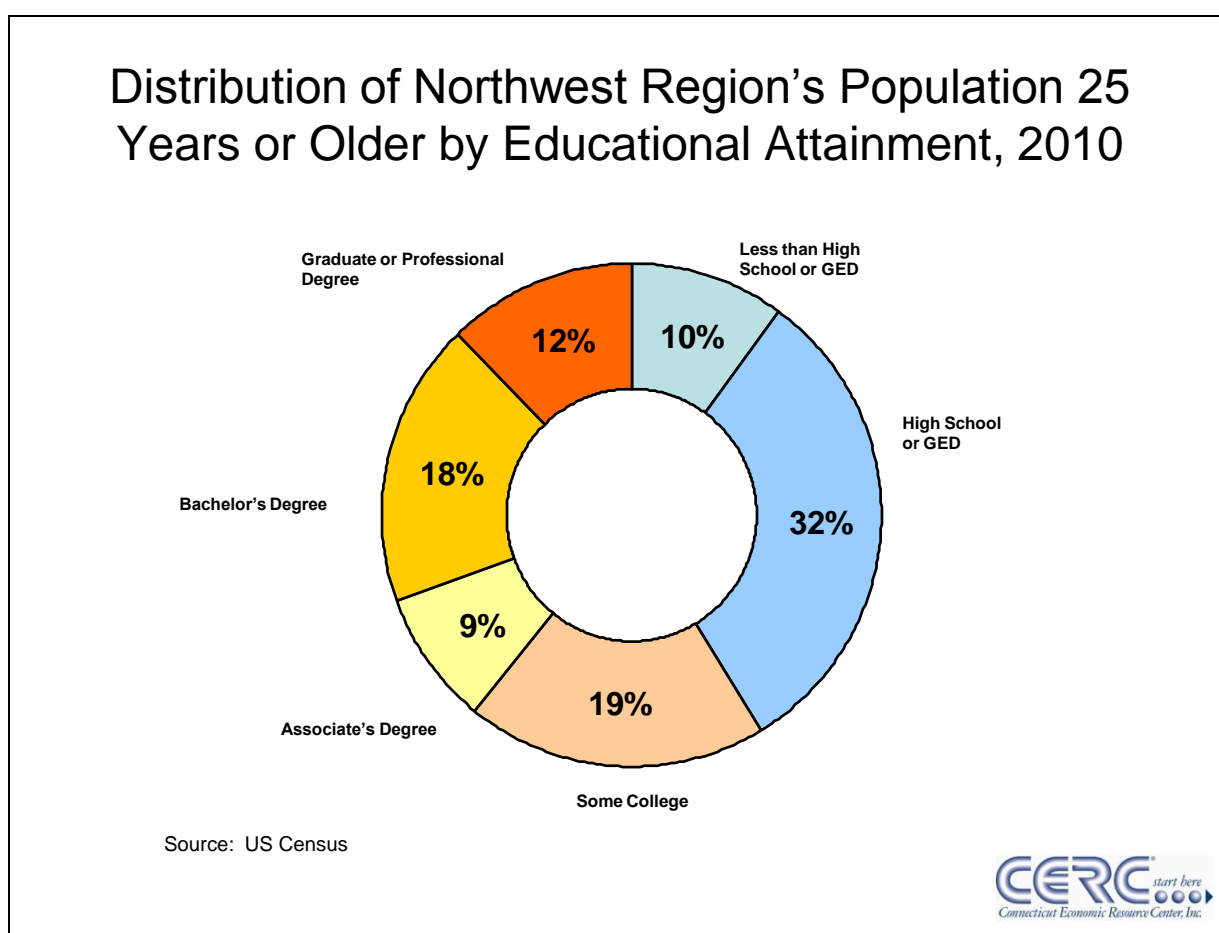


Figure 40 shows the portion of the region's population age 25 and older with a Bachelor's or higher degree broken down by community, and compared with the regional average. The two largest communities in the region – Torrington and Winchester – have the least and third least portion of their residents with a completed college or graduate level education. However, companies locating in these communities can draw from a regional labor pool with a higher level of education.

Figure 40

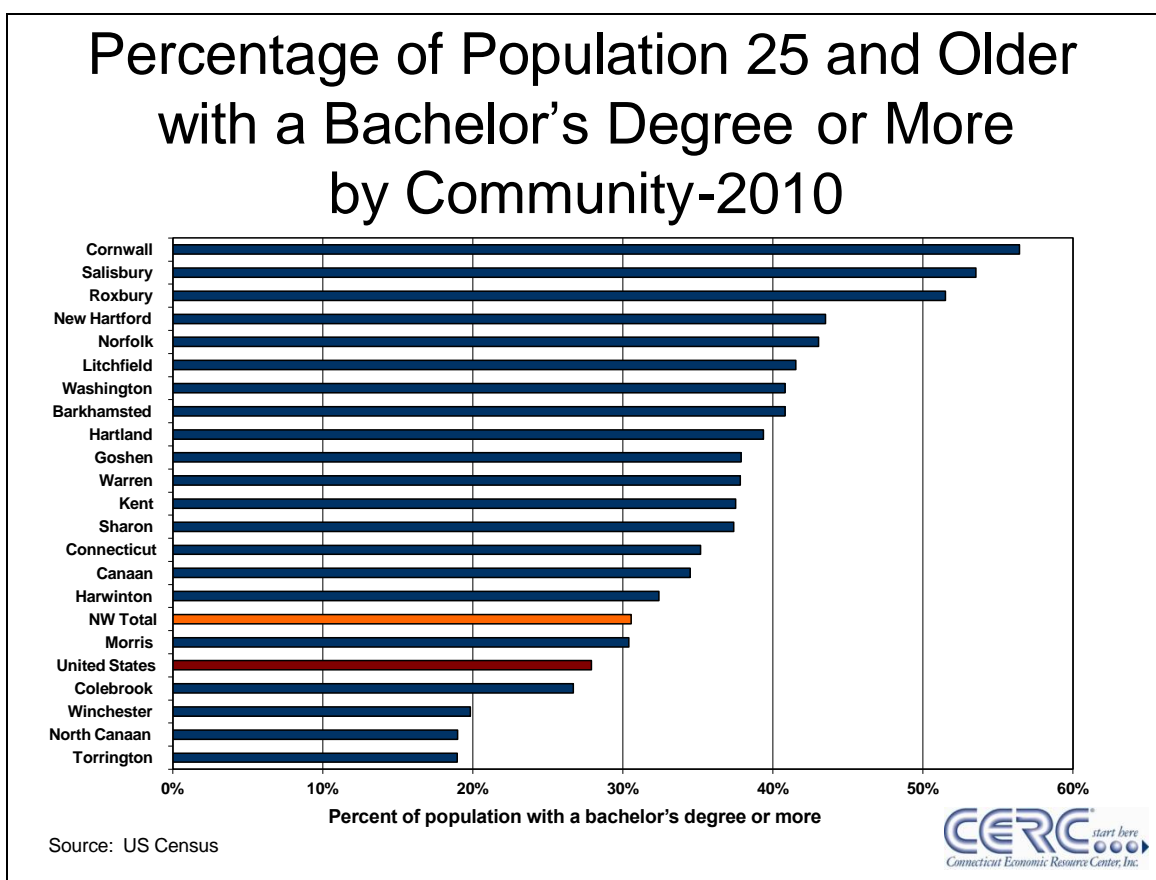


Figure 41 shows that the region's educational attainment lags that of Connecticut as a whole for Bachelor's and Graduate/Professional Degrees, but is equal to or better than national statistics in these areas. The region has a higher portion of its residents with an Associate's Degree compared to the State and nation. Conversely, the region has a higher number of residents with only a high school diploma or GED (31 percent of the population) than either the State or nation. These differences may negatively impact the perception of the region's ability to provide an adequate number of workers for companies seeking a high level of education.

Figure 41

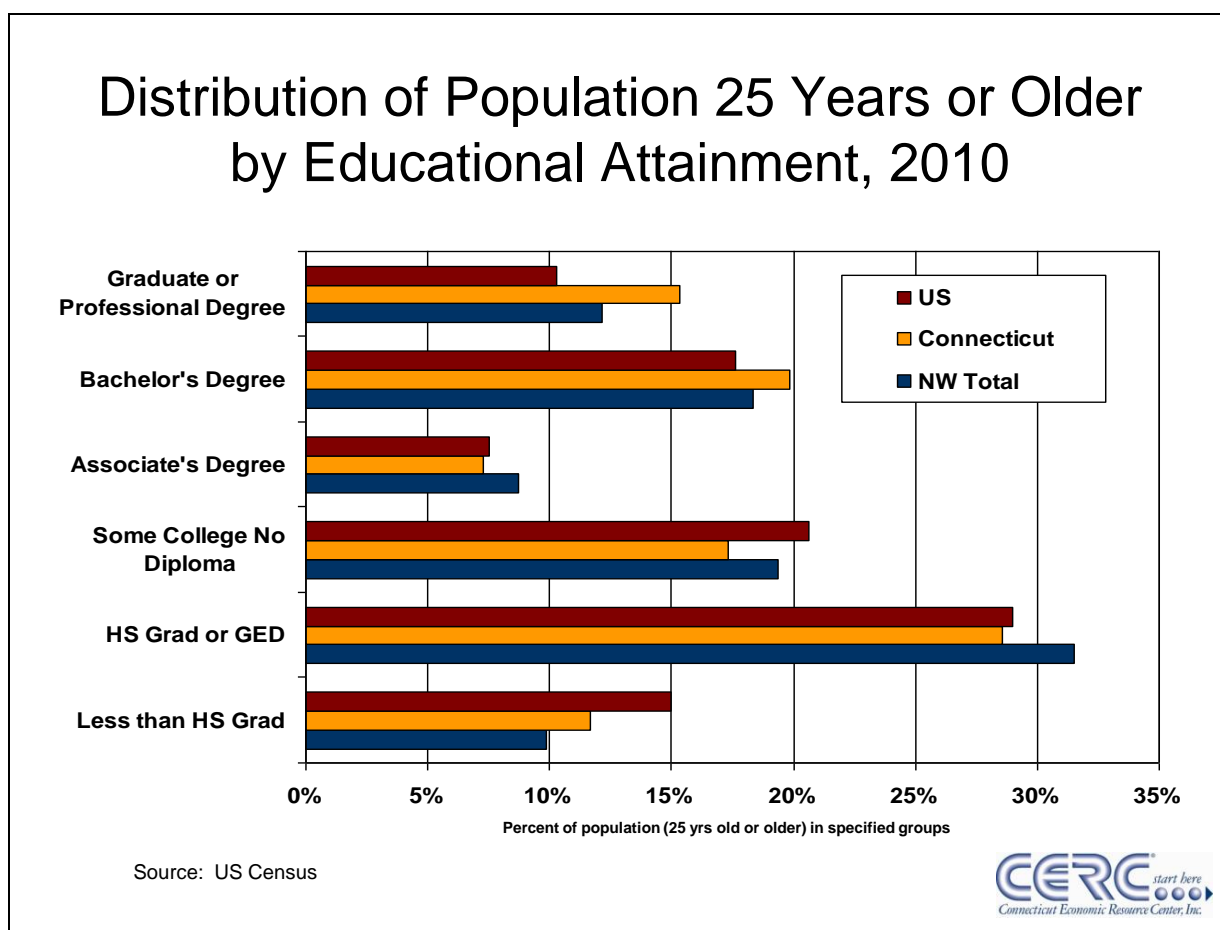


Figure 42 shows that the region has been improving its level of educational attainment during the 2000 – 2010 decade, particularly in the portion of its 25 and older cohort with Bachelor's degrees, as compared with State and national figures. Specifically, Figure 42 shows the percentage growth or decline between 2000 and 2010 in the various educational attainment categories for the Northwest Connecticut region as compared with Connecticut and the nation. The category where the region has differed most from the State and nation is in the percent of the population with some college but no diploma, most likely reflecting the presence of both Northwest Connecticut Community College and the Torrington branch of the University of Connecticut.

Figure 42

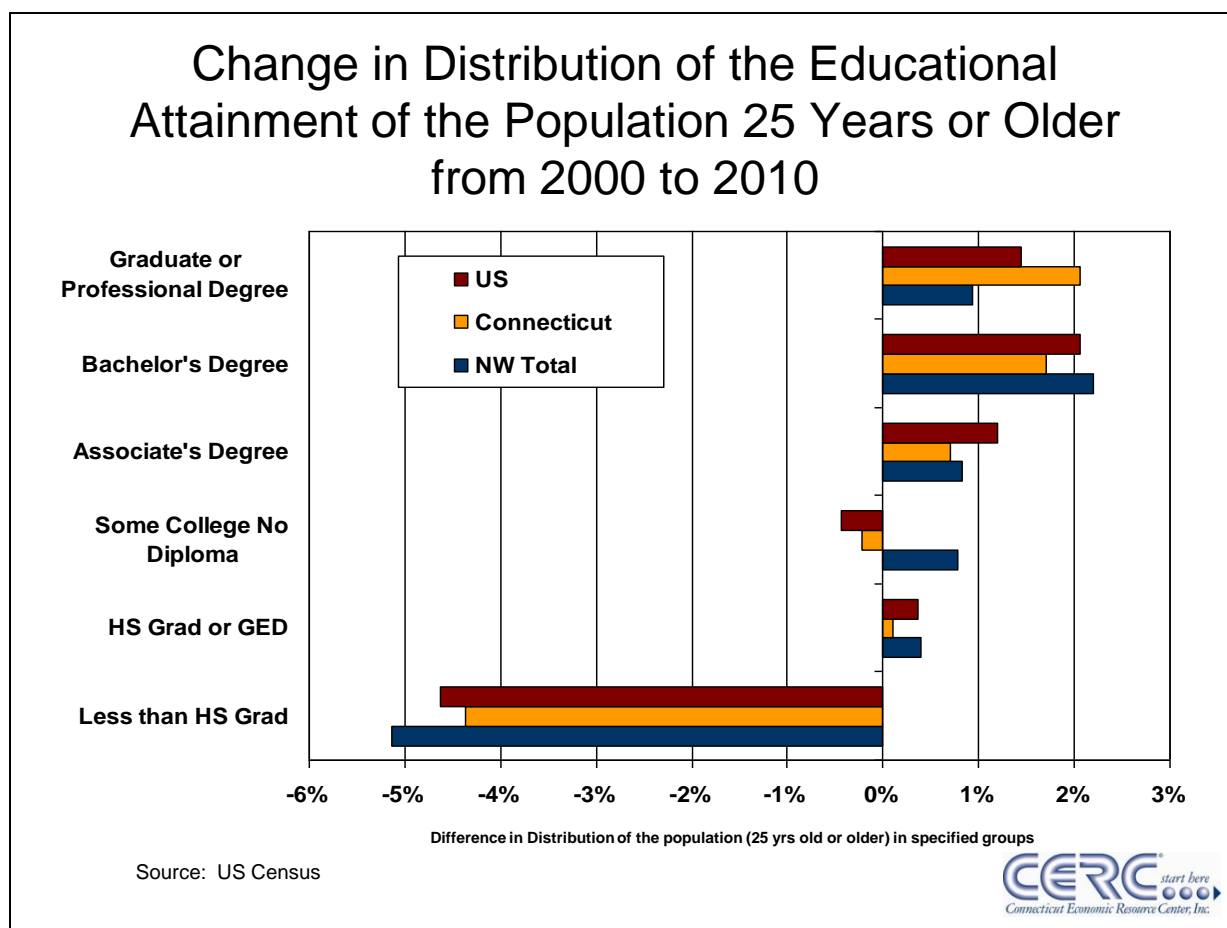
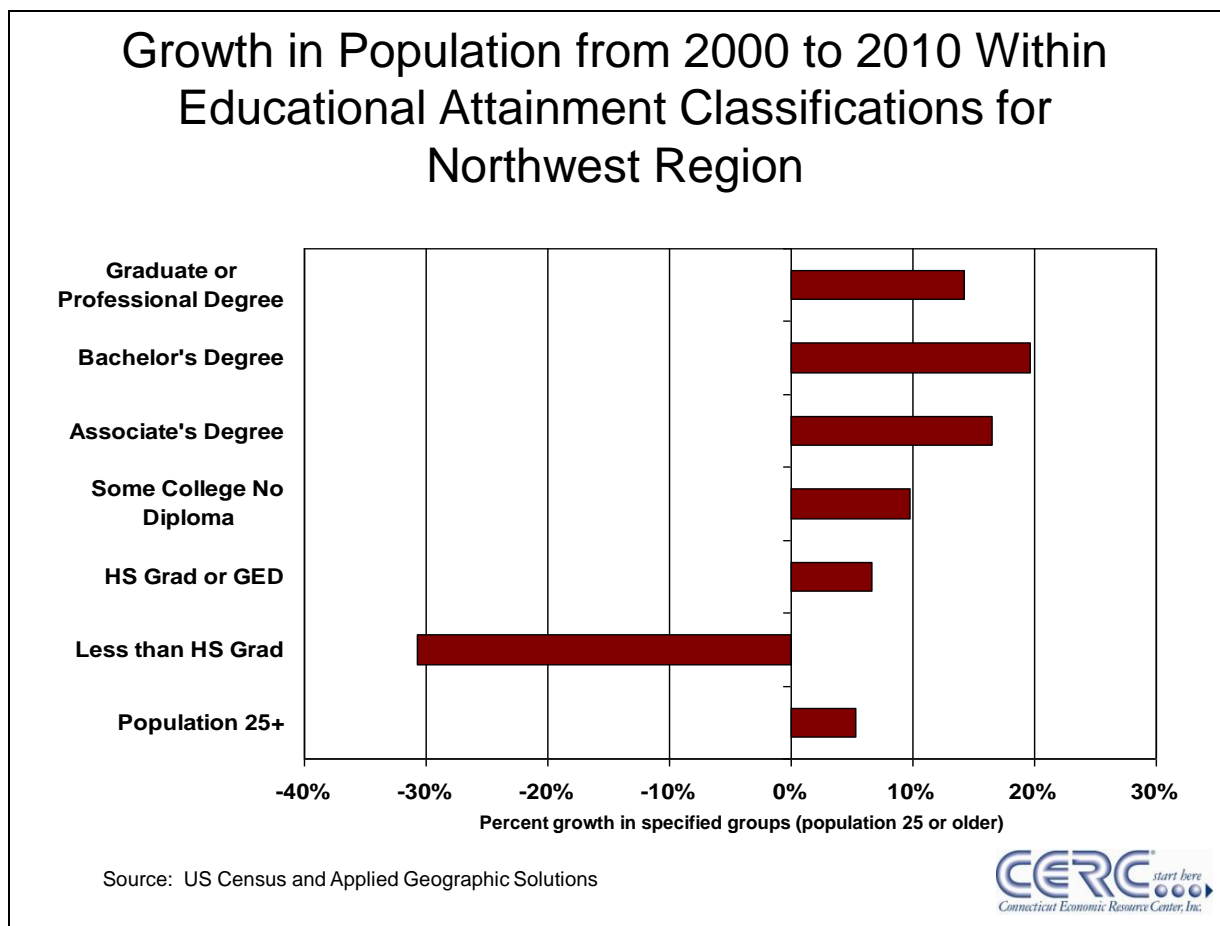


Figure 43 shows the increase in percentage of the regional population in the 25 and older age cohort in educational attainment between 2000 and 2010, a positive trend related to both employment and purchasing power potential. (The 25 or older cohort is used because most of the younger groups are still in school with an undetermined final level of educational attainment.) The 34 percent increase in those with a Bachelor, Graduate or Professional Degree and the 31 percent decline in those with less than a full high school education are particularly noteworthy when assessing the region's resident workforce.

Figure 43

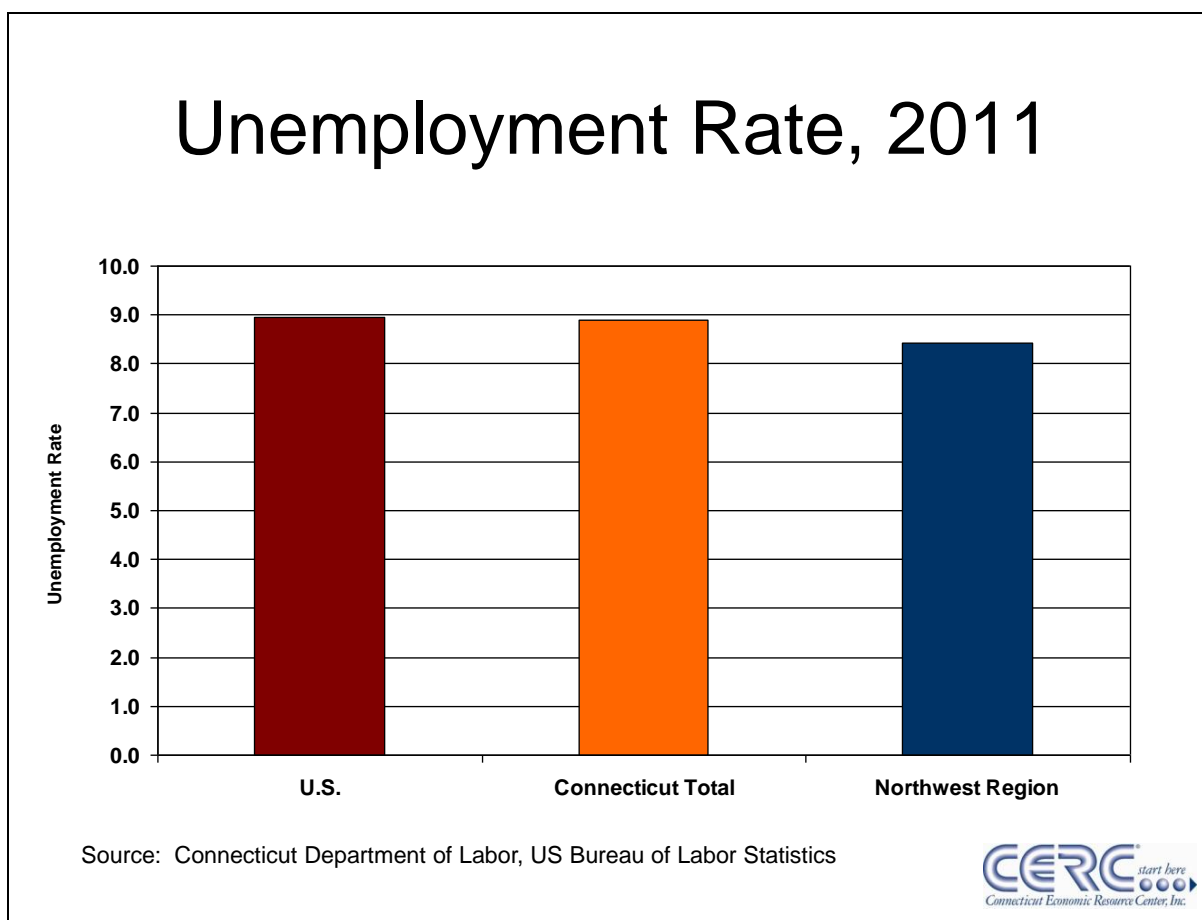
Implications

- The region's lower portion of residents with advanced degrees, and its high percentage of residents with only a high school diploma or GED, may be a weakness in recruiting companies looking for a highly educated workforce.
- In particular, Torrington and Winchester are weak in these educational attainment areas. However, companies locating in these communities can draw from a regional labor pool with a higher level of education.
- An adequate road network is needed to facilitate commuting from place of residence to educational facilities.

Employment Information

Figure 44 compares the region's average unemployment rate for 2011 with the State and nation, and shows that the region was doing somewhat better at that time.

Figure 44



As this Economic and Demographic Profile was prepared, July 2012 was the most recent employment data available. Table 3 provides comparative Labor Force Data (from the Connecticut Department of Labor's monthly "Labor Force Data for Labor Market Areas & Towns" report).

Table 3

July 2012 Labor Force Information – Not Seasonally Adjusted				
Area	Labor Force	Employed	Unemployed	Unemployment Rate (%)
Barkhamsted	2,329	2,132	197	8.5
Canaan	696	658	38	5.5
Colebrook	839	786	53	6.3
Cornwall	820	773	47	5.7
Goshen	1,602	1,481	121	7.6
Hartland	1,214	1,147	67	5.5
Harwinton	3,251	2,990	261	8.0
Kent	1,666	1,560	106	6.4
Litchfield	4,465	4,136	329	7.4
Morris	1,366	1,261	105	7.7
New Hartford	3,972	3,669	303	7.6
Norfolk	1,000	942	58	5.8
North Canaan	1,797	1,640	157	8.7
Roxbury	1,375	1,301	74	5.4
Salisbury	1,907	1,783	124	6.5
Sharon	1,484	1,397	87	5.9
Torrington	20,642	18,614	2,028	9.8
Warren	826	763	63	7.6
Washington	1,970	1,830	140	7.1
Winchester	5,873	5,471	402	6.8
Northwest CT Region	59,094	54,334	4,760	8.1
Torrington LMA	57,014	52,297	4,717	8.3
Connecticut	2,329	1,758,900	179,400	9.3

Table 3 shows the region currently has a labor force of slightly more than 59,000, with 4,760 unemployed, or a regional unemployment rate of 8.1 percent. While the region is doing somewhat better than the Torrington Labor Market Area (16 of the region's 20 communities are in this LMA), there is a wide variation from Roxbury's unemployment rate of 5.4 percent to Torrington's 9.8 percent. Recognizing that official unemployment statistics underreport the actual unemployment and underemployment situation, there is an obvious need for additional employment opportunities in the region.

Figure 45 provides comparative unemployment statistics for the region, State and nation for the 2000 – 2010 decade. This Figure demonstrates that the region's unemployment rate has consistently been lower than the State and nation. This reflects the region's educated and mature labor pool, factors that would be advantageous in staffing up new companies in Northwest Connecticut, particularly given the high level of out-commuting by the region's residents mentioned elsewhere in this report. (While CERC's community profiles do not include information on commuting patterns from the 2010 Census, information from the 2000 Census showed nearly 10,000 regional residents commuting out of the region including more than 600 to New York City.)

Figure 45

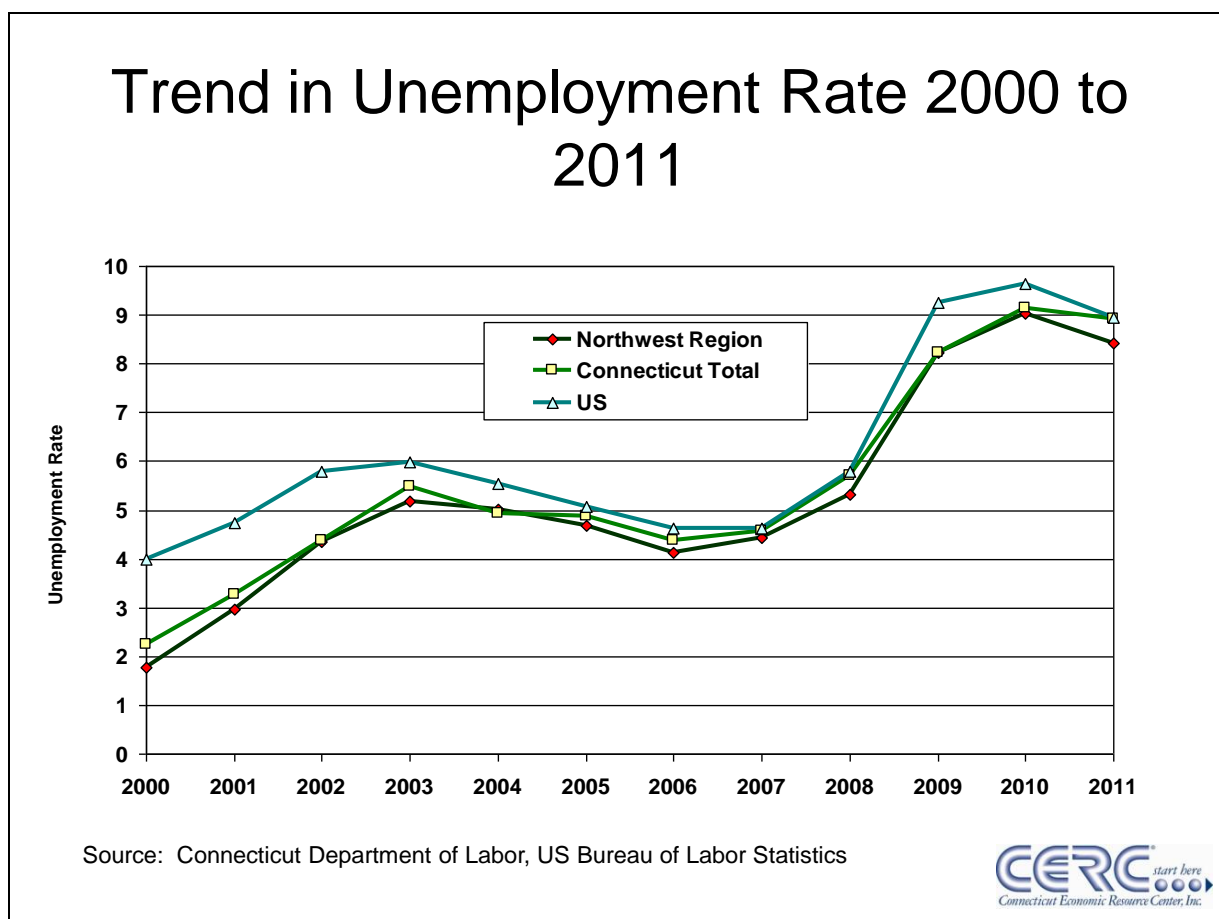


Figure 46 compares employment in the region, State and nation over the 2000 – 2010 decade, using 2000 as the base year for calculating an employment index; this index shows a percent change by year from the base year of 2000 which has an index value of 1.00. While all three areas are below their 2000 number as of 2010, the Northwest Connecticut region has had the largest drop, which is largely coincidental with the recent recession and very slow recovery.

Figure 46

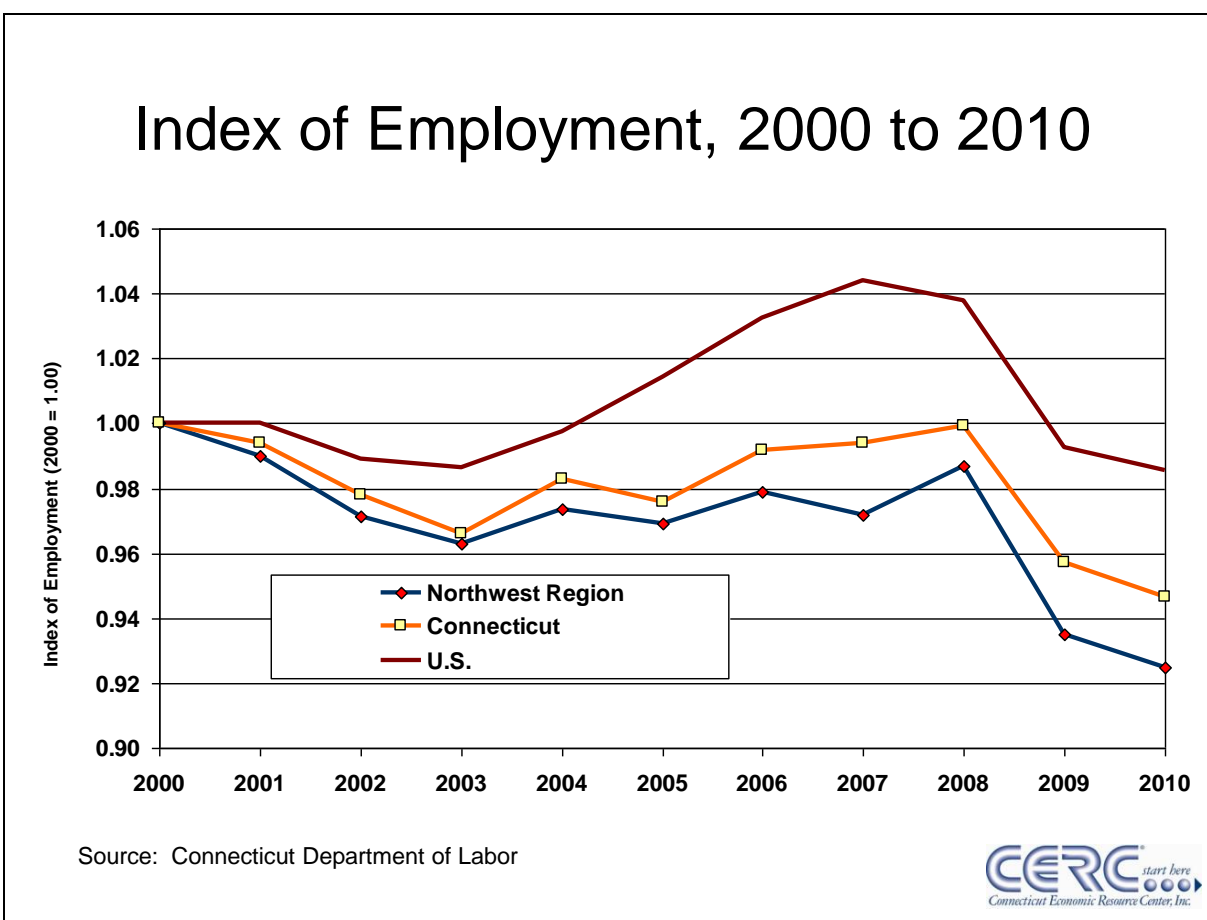


Figure 47 compares the growth in the region's labor force with that of the State and nation between 2000 and 2011. While Connecticut and the nation have grown by more than 7 percent, the region has grown only slightly more than 1 percent, reflecting an even smaller labor force growth than the region's population growth would predict.

Figure 47

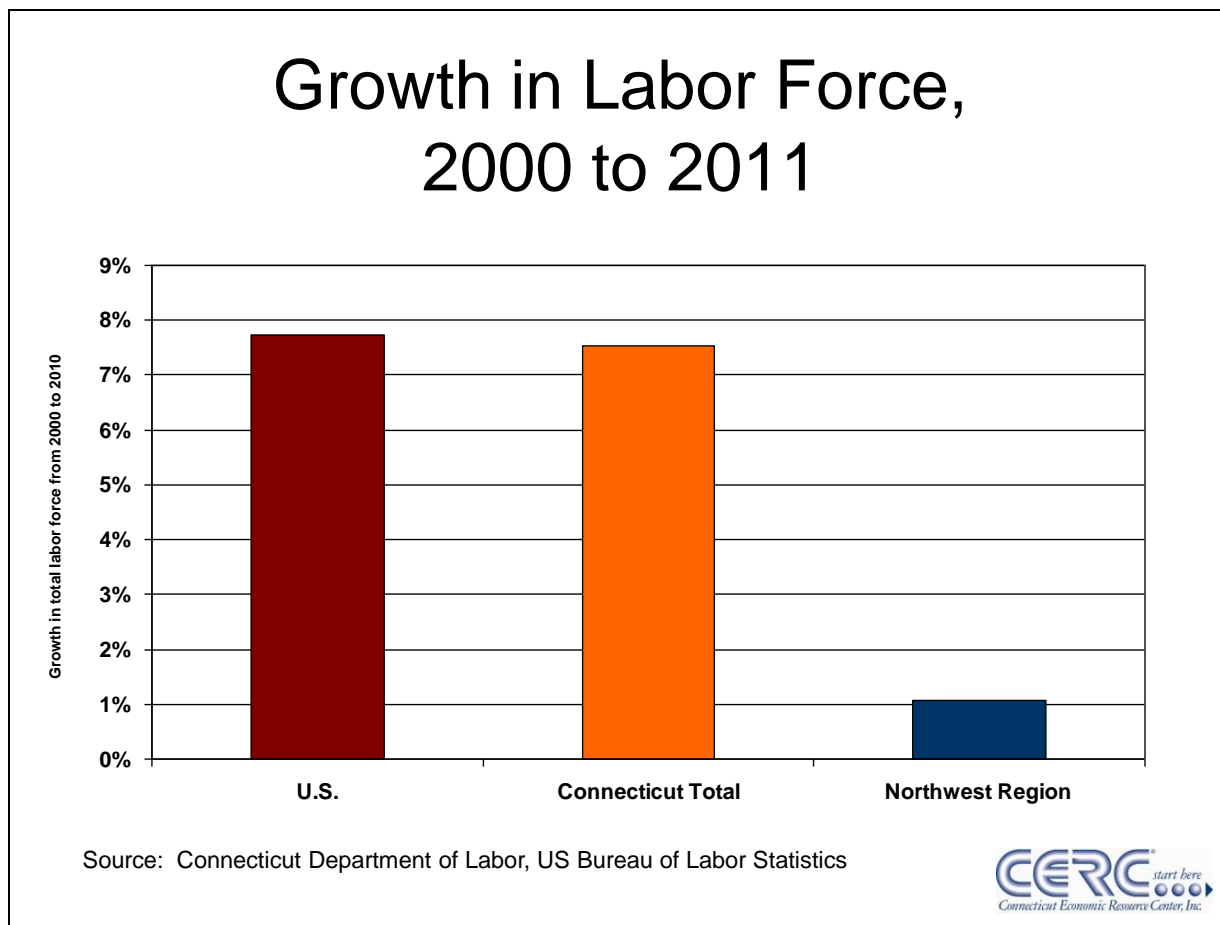


Figure 48 shows how the region's labor force changed between 2000 and 2011 by community. Half of the region's communities experienced a decline in labor force during that timeframe. Half of these (Cornwall, North Canaan, Salisbury, Sharon, and Washington) were also the five communities in the region that experienced population declines between 2000 – 2010 (see Figure 8).

Figure 48

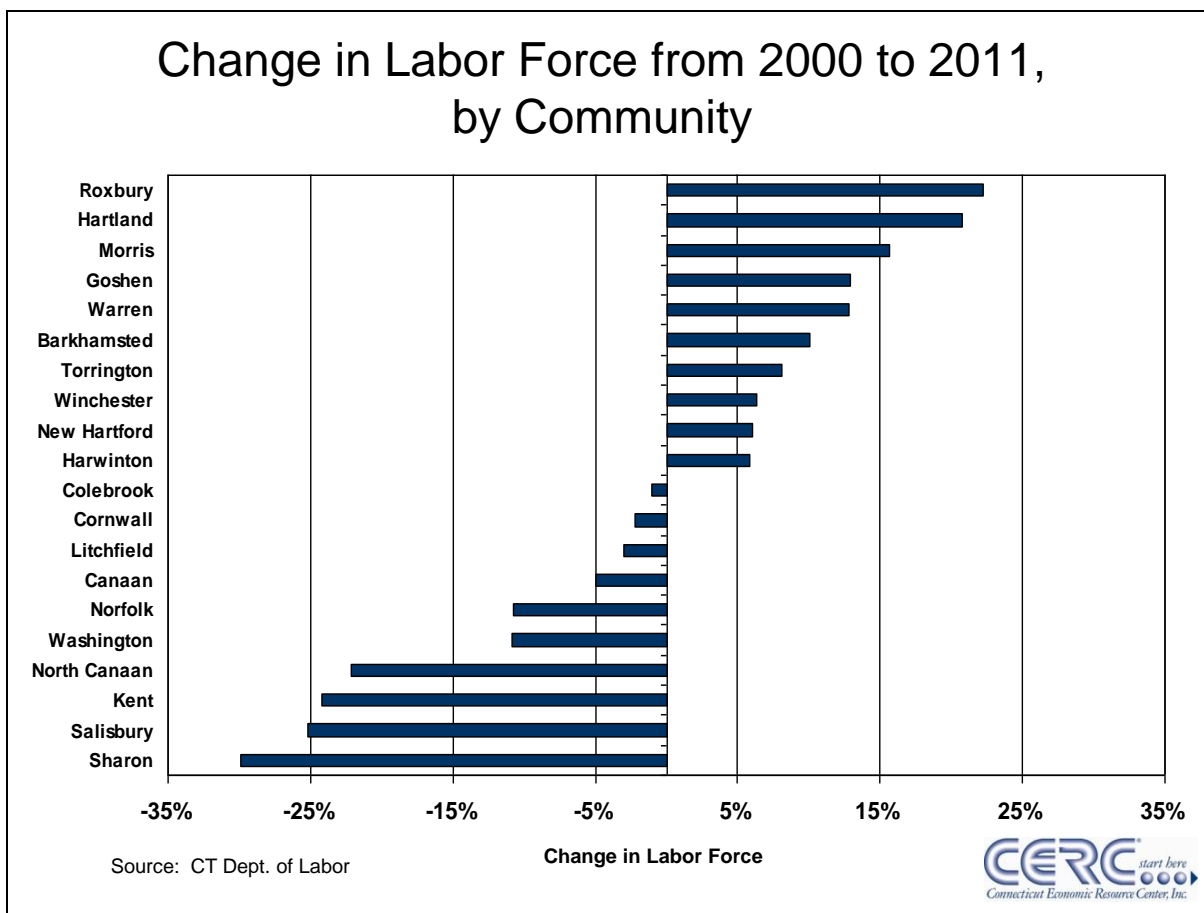


Figure 49 shows the distribution of the region's employment by community (the number of jobs available in each community, not the number of residents in the labor force). The three largest population communities, Torrington, Winchester and Litchfield, had the greatest number of jobs.

Figure 49

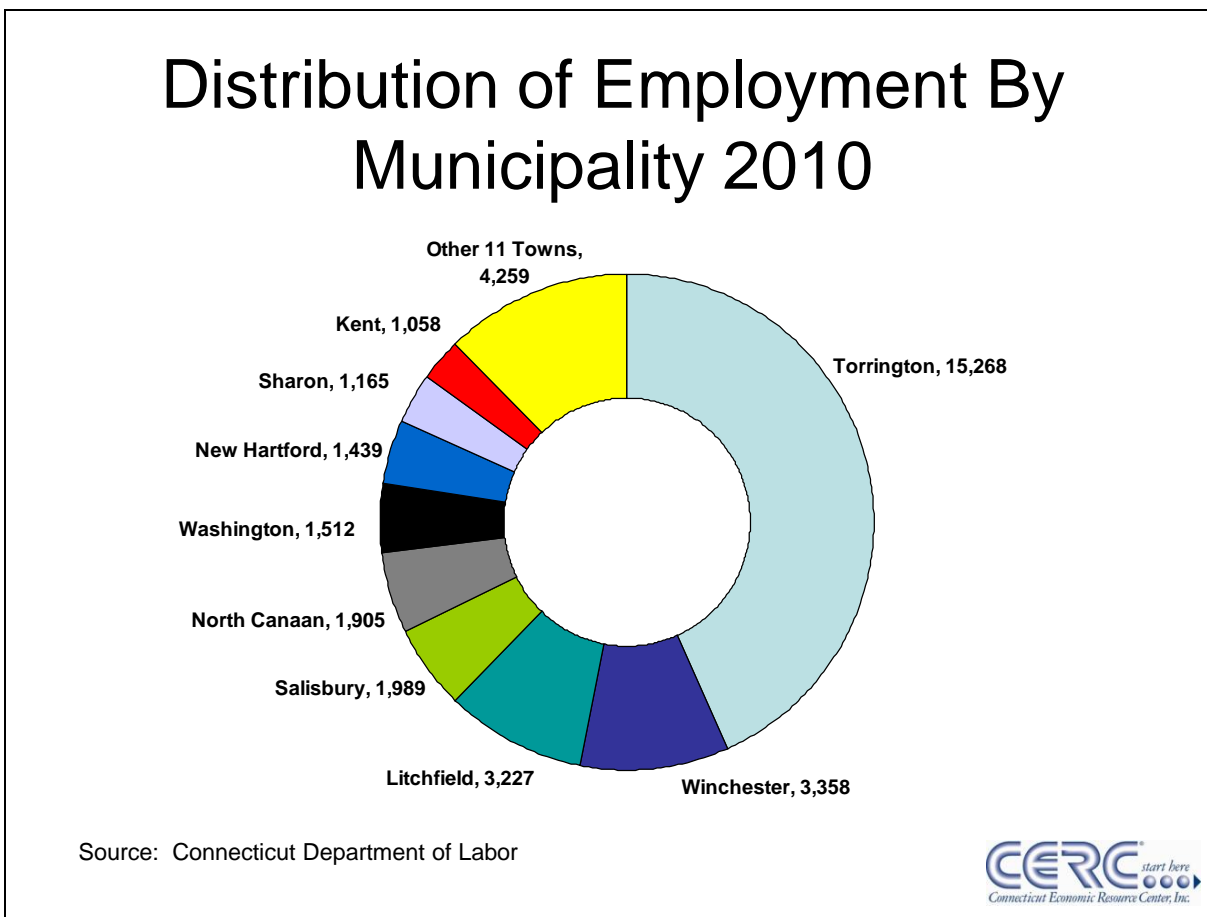
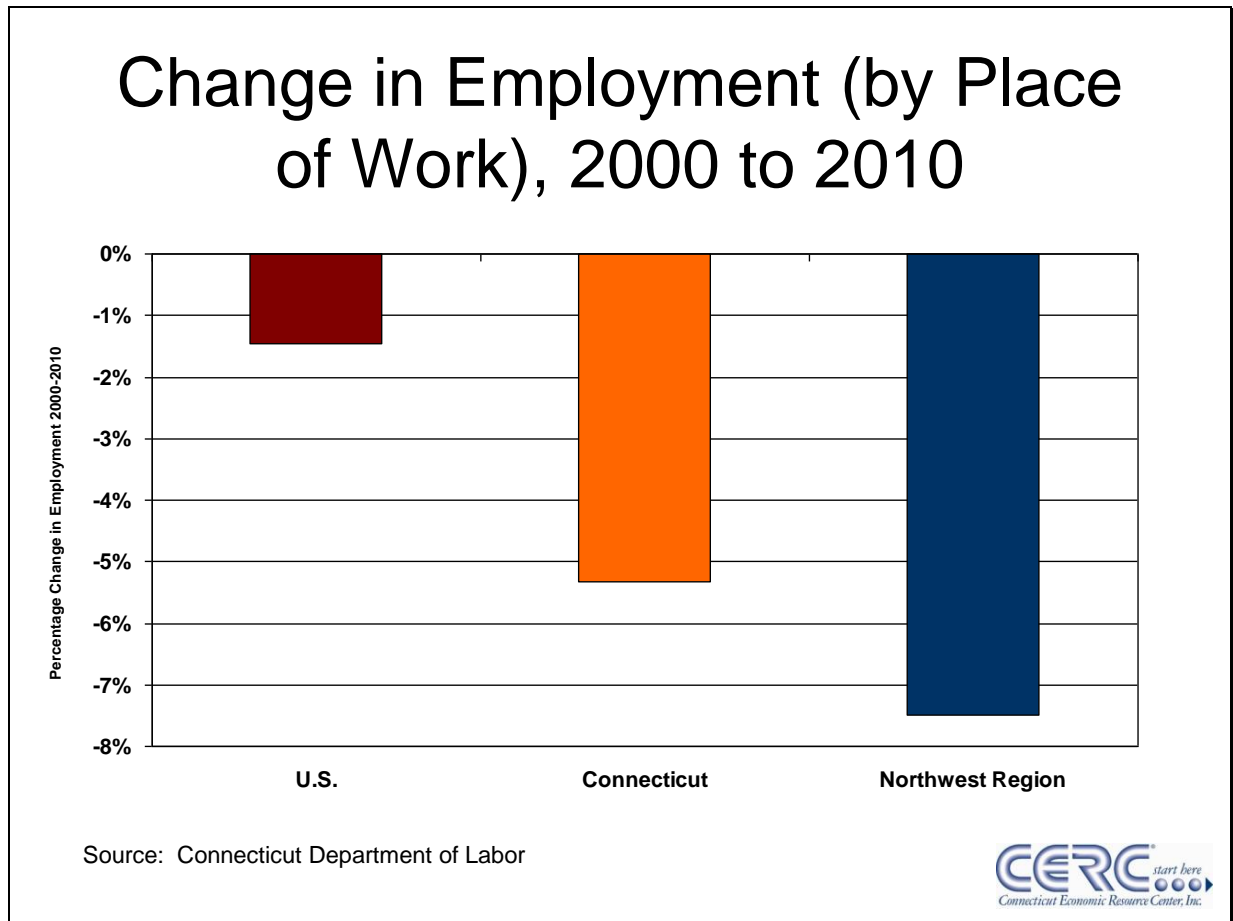


Figure 50 shows that a decline in the number of available jobs occurred in the region, State and nation between 2000 and 2010, reflecting the impacts of the recession and slow recovery. The region had the largest reduction in jobs at more than 7 percent.

Figure 50



Implications

- Recognizing that official unemployment statistics underreport the actual unemployment and underemployment situation, there is an obvious need for additional employment opportunities in the region.
- The region's very small growth (just over 1 percent) in labor force between 2000 and 2011 does not suggest that the region can support significant economic growth. However, the region's more than 4,700 unemployed, as well as discouraged workers and underemployed workers, must also be taken into account. Efforts to document the actual availability of workers in the region would be worthwhile.

Income

Connecticut is recognized as a wealthy state, but with significant pockets of poverty, particularly in its larger cities. Figure 48 shows that the region's median household income (nearly \$67,000), while somewhat below the State (nearly \$71,000), is significantly higher than the median household income of the nation (\$53,600).

Figure 51

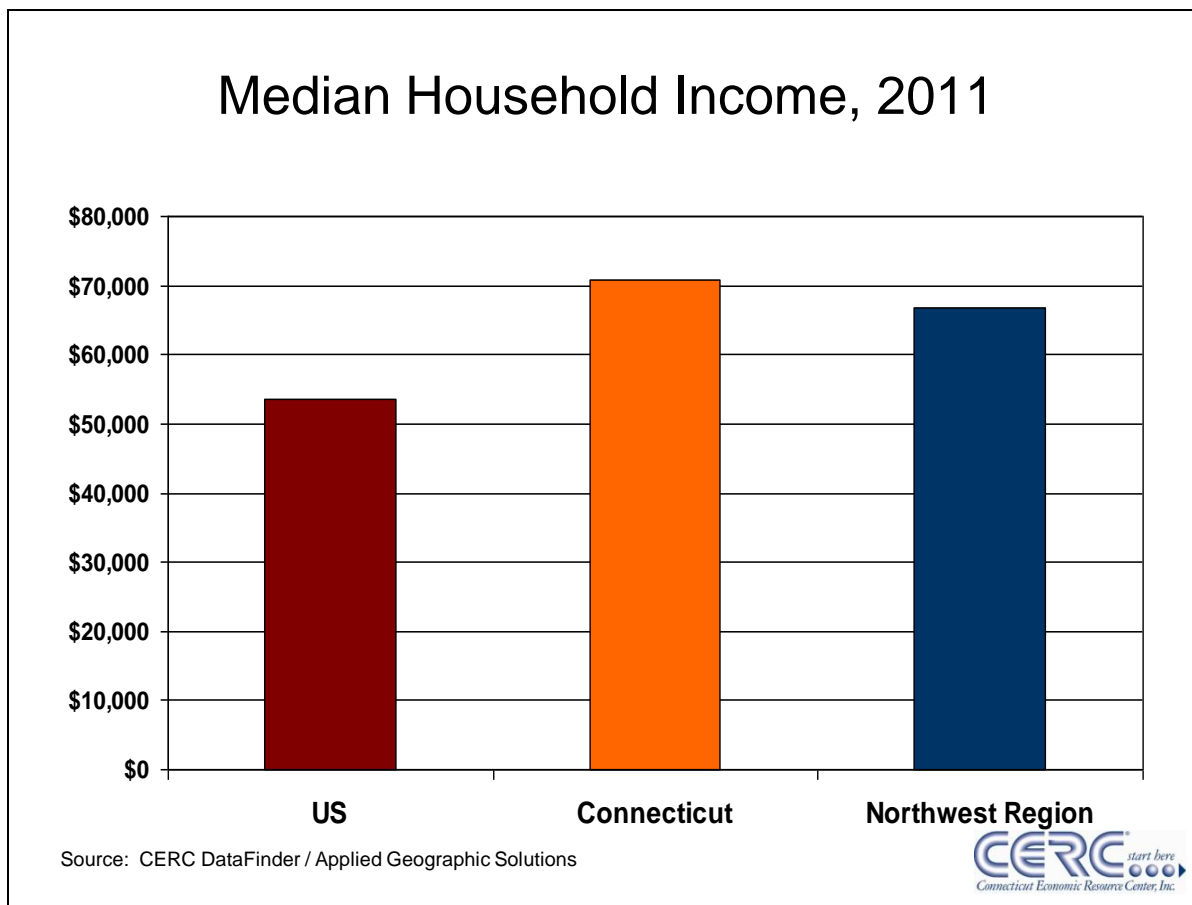


Figure 52 shows that the region's median household income is not equally distributed by community. Four communities (North Canaan, Torrington, Canaan, and Winchester) have median household incomes more than 10 percent below the regional average. This includes the region's two most populous communities. On the other hand, Northwest Connecticut, as a whole, is a relatively affluent region with 16 of its 20 communities having a median household income that exceeds the state average and only two communities with median household incomes below the national average.

Conversely, Roxbury has a median household income that far exceeds the regional average, and 10 other communities in the region exceed \$80,000.

Figure 52

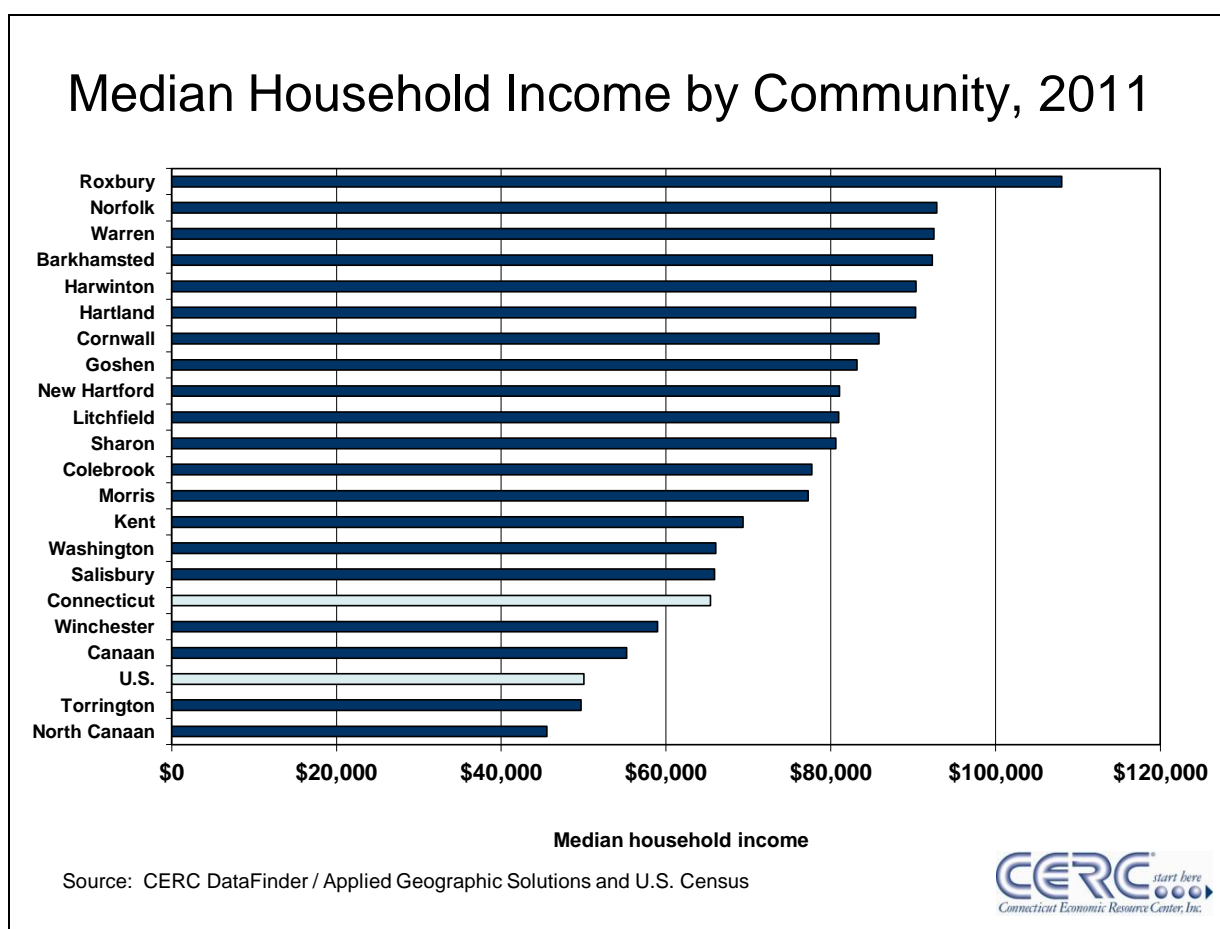


Figure 53 compares the 2000 – 2010 change in median household income of the region with the State and nation. The region's growth of more than \$14,000 exceeded the national increase of \$11,400, but was less than the state's \$16,415.

Figure 53

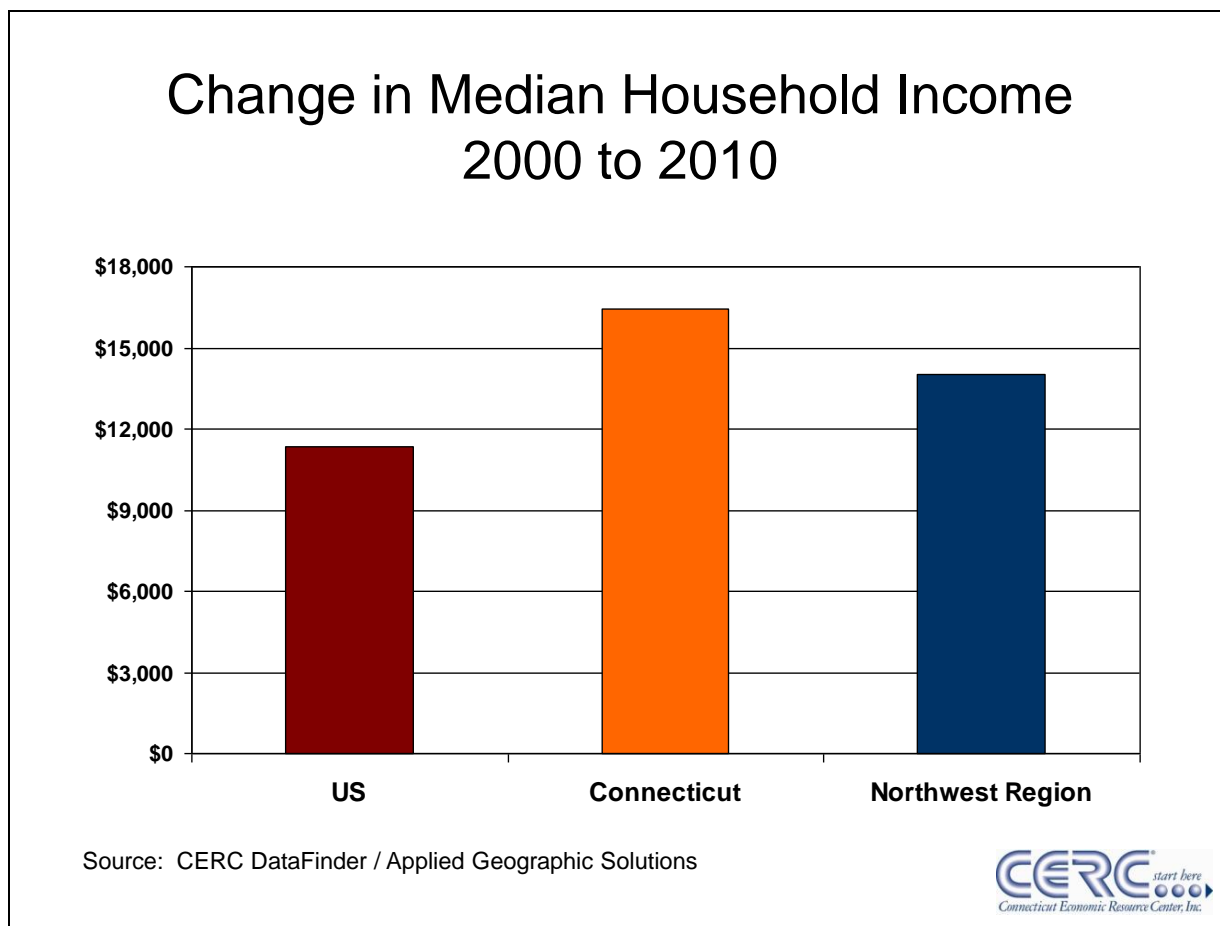
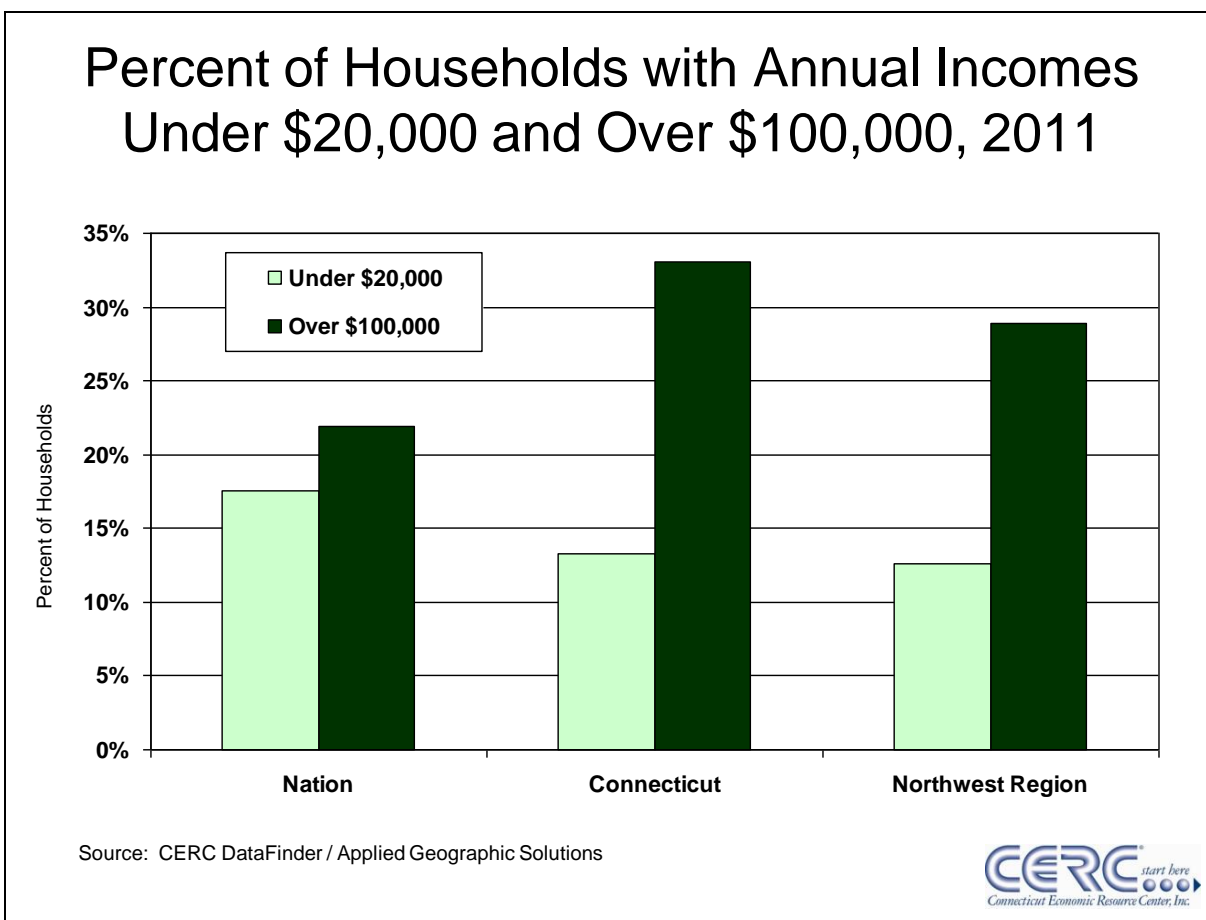


Figure 54 shows the upper (more than \$100,000) and lower (under \$20,000) ends of the income spectrum for the region, State and nation. The region is fortunate to have a smaller percentage of its households with less than \$20,000 income than Connecticut or the nation. The region also has a significant portion (nearly 29 percent) of its households with incomes in excess of \$100,000. While this is not as high as the State as a whole, it still indicates a high level of disposable income.

Figure 54



Implications

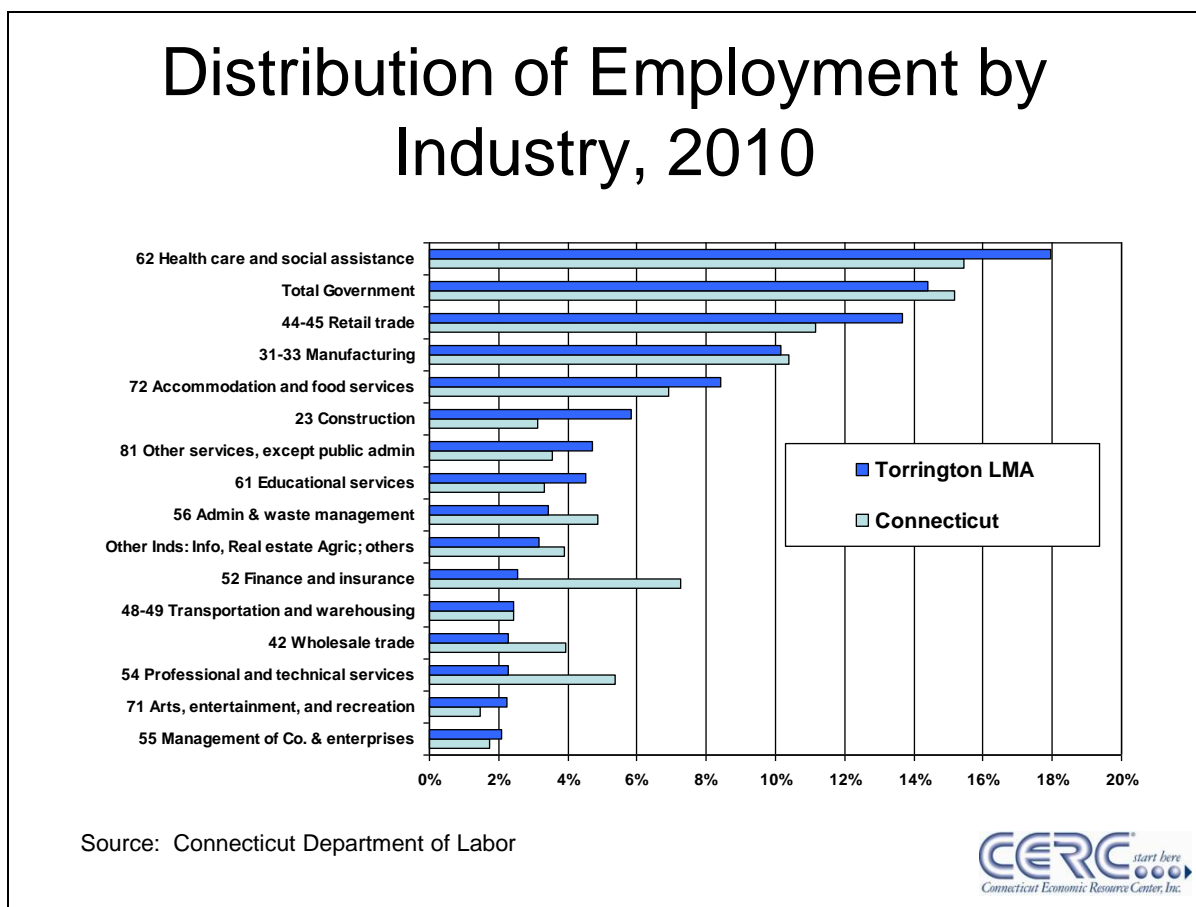
- The Northwest Connecticut region has a high median household income indicating a significant level of disposable income. However, this must be viewed in the context of the cost of living in Connecticut and the region.
- Retail or personal service businesses seeking locations within the region have a wide range of options given the favorable distribution of high income households and supporting road network linking the region's communities.

Industry Employment and Wages

The Northwest Connecticut region is comprised of 16 communities from the Torrington Labor Market Area (LMA) and 4 communities from the Hartford LMA. Therefore, while not a completely perfect match, the Torrington LMA provides the best regional information from Connecticut Department of Labor data. The regional communities not included in the Torrington LMA data are Barkhamsted, Hartland, Harwinton, and New Hartford. These four communities represent 16.6 percent of the region's population and 16.8 percent of the region's labor force.

Figure 55 shows the breakdown of employment in the LMA in 2010 for the region and State. (It should be noted that many of the jobs in the LMA are filled by people who do not live in the region. Conversely, many of the region's residents are employed outside the region). The largest employment sector for both the region and State was healthcare and social assistance, with government employment the second largest, retail trade third largest, and manufacturing fourth largest in both areas. The region significantly lags the state in employment in the finance and insurance and professional and technical services sectors, but has a noticeably higher portion of its residents employed in construction.

Figure 55



Figures 56—58 look at the potential of various industries for the Northwest Connecticut region. These sectors are segmented by those already a major sector in the State with current local growth (Figure 56); those in the State with strong recent performance (Figure 57); and those identified by CERC as having potential for development and growth (Figures 58).

In all, 16 sectors are identified as having good potential from expansion or development in the region.

Figure 56

Connecticut Wide Industry Segmentation, 2005-2010			
Major Industry Sectors in Connecticut			
	Historical Strength	Job Gains in Connecticut	Locally Competitive Relative to Nation
Historical strength and current local growth			
<i>Management of Companies</i>	YES	YES	YES
Historical strength with relatively weak local growth			
<i>Educational Services</i>	YES	YES	No
<i>Health Care and Social Assistance</i>	YES	YES	No
Historical strength with structural challenges limiting employment growth			
<i>Manufacturing</i>	YES	No	YES
<i>Finance and Insurance</i>	YES	No	YES
Emerging strength with observed local growth			
<i>Accommodation and Food Service</i>	No	YES	YES

Figure 57

Connecticut Wide Industry Segmentation, 2005-2010

Specific Industries in Connecticut with Strong Performance

	Historical Strength	Job Gains in Connecticut	Locally Competitive Relative to Nation
Historical strength and current local growth			
<i>Broadcasting except Internet</i>	YES	YES	YES
<i>Securities, commodity contracts, investments</i>	YES	YES	YES
<i>Management of companies and enterprises</i>	YES	YES	YES
<i>Social assistance</i>	YES	YES	YES
Historical strength with relatively weak local growth			
<i>Transit and ground passenger transportation</i>	YES	YES	No
<i>Info services (news syndicates, independent artists)</i>	YES	YES	No
<i>Educational services</i>	YES	YES	No
<i>Nursing and residential care facilities</i>	YES	YES	No

Figure 58 – Part A

Connecticut Wide Industry Segmentation, 2005-2010

Specific Industries in Connecticut with Potential for Development and Growth

(1 of 2)

	Historical Strength	Job Gains in Connecticut	Locally Competitive Relative to Nation
Historical strength but with structural challenges for employment growth			
<i>Electrical equipment and appliance mfg.</i>	YES	No	YES
<i>Transportation and equipment manufacturing</i>	YES	No	YES
<i>Retail clothing and accessory stores</i>	YES	No	YES
<i>Water transportation</i>	YES	No	YES
Historical strength with potential for growth			
<i>Chemical mfg.</i>	YES	YES	No
<i>Fabricated metal product mfg.</i>	YES	YES	No
<i>Machinery mfg.</i>	YES	YES	No
<i>Insurance carriers</i>	YES	YES	No
<i>Waste management and remediation services</i>	YES	YES	No



Figure 58 – Part B

Connecticut Wide Industry Segmentation, 2005-2010			
Specific Industries in Connecticut with Potential for Development and Growth			
(2 of 2)	Historical Strength	Job Gains in Connecticut	Locally Competitive Relative to Nation
Emerging strength due to observed local growth in employment			
<i>Motion pictures and recording studios</i>	No	YES	YES
<i>Hospitals</i>	No	YES	YES
<i>Amusements gambling and recreation</i>	No	YES	YES
<i>Food services and drinking establishments</i>	No	YES	YES
<i>Ambulatory health care services</i>	No	YES	No



Implication

- The Northwest Connecticut region has the potential to diversify its economy across a wide cross-section of industry sectors, many of which offer wages that will help improve the region's economy and standard of living.

Figure 59 (Parts A – D) shows the 2010 employment by industry in each of the region’s communities (in other words, jobs by place of work). Because of the small number of establishments in many of the region’s communities, the Department of Labor suppresses the data so that company-specific data, or data that would identify individuals, is not publicly available.

Aside from government employment, which is a major sector for residents of most communities but not included in Table 4 which shows only private sector employment categories, there are noticeable differences among the communities. Table 4 shows the two largest employment sectors for residents of the region’s 20 communities based on the data from CTDOL shown in Figure 59 (Parts A – D).

Table 4
Largest Employment Sectors by Community, 2010

Community	Largest Employment Sector	2nd Largest Employment Sector
Barkhamsted	Manufacturing	Retail Trade
Canaan	Retail Trade	Finance & Insurance
Colebrook	Not available	Not available
Cornwall	Other Services (except Admin)	Retail Trade
Goshen	Construction	Retail Trade
Hartland	Construction	Admin & Waste management & Remediation Services
Harwinton	Construction	Professional, Scientific & Technical Services
Kent	Education	Health Care & Social Assistance
Litchfield	Retail Trade	Health Care & Social Assistance
Morris	Manufacturing	Construction
New Hartford	Manufacturing	Retail Trade
Norfolk	Admin & Waste management & Remediation Services	Professional, Scientific & Technical Services
North Canaan	Manufacturing	Health Care & Social Assistance
Roxbury	Construction	Other Services (except Admin)
Salisbury	Education	Accommodation & Food Services
Sharon	Health Care & Social Assistance	Other Services (except Admin)
Torrington	Health Care & Social Assistance	Retail Trade
Warren	Admin & Waste management & Remediation Services	Manufacturing
Washington	Accommodation & Food Services	Education
Winchester	Manufacturing	Health Care & Social Assistance

Figure 59 – Part A

Employment by Industry in the Region, 2010 (1 of 4)

Ind Name	Barkhamsted	Canaan	Colebrook	Cornwall	Goshen	Hartland
Total - All Industries	*	697	*	455	348	139
Agriculture, Forestry, Fishing & Hunting		*		8	*	
Utilities		*				
Mining						
Construction	34	29	*	32	41	19
Manufacturing	155	*	*	*	11	
Transportation & Warehousing	*			*	*	*
Wholesale Trade	7	14		4	10	*
Retail Trade	74	180		40	28	
Information	*	*		7	*	
Finance & Insurance	*	46	*	*	*	
Real Estate & Rental & Leasing	*	5		*	9	*
Professional, Scientific, & Technical svcs	*	*	*	13	9	
Admin & Waste Mngmnt & Remediation svcs	*	20	*	14	14	12
Management of Companies & Enterprises						
Health Care & Social Assistance	5	35	*	*	*	
Educational svcs	*	*	*	*	*	*
Accommodation & Food svcs	62	*		*	*	*
Arts, Entertainment, & Recreation	*	*		*	*	
Other svcs (except Public Administration)	13	23	*	71	*	3
Unclassifiable/unknown industry						
Total Government	149	195	53	83	70	86
Federal Government	4	11	4	12	7	4
State Government	18		1	12		13
Local/Municipal Government	127	185	48	58	63	69

* Industry employment suppressed by CT Dept. of Labor

Source: CT Dept. of Labor



Figure 59 – Part B

Employment by Industry in the Region, 2010 (2 of 4)

Ind Name	Harwinton	Kent	Litchfield	Morris	New Hartford
Total - All Industries	560	1,058	3,227	403	1,439
Agriculture, Forestry, Fishing & Hunting		*	29	*	*
Utilities	*				
Mining					
Construction	142	36	122	27	58
Manufacturing	15	23	54	52	433
Transportation & Warehousing	11	*	*	*	58
Wholesale Trade	*	*	42	*	56
Retail Trade	24	115	494	21	201
Information	*	*	54	*	*
Finance & Insurance	*	19	143	*	10
Real Estate & Rental & Leasing	*	16	21	*	*
Professional, Scientific, & Technical svcs	35	16	105		21
Admin & Waste Mngmnt & Remediation svcs	28	*	111	12	42
Management of Companies & Enterprises		*	*		
Health Care & Social Assistance	25	184	384	*	57
Educational svcs	*	249	*	*	12
Accommodation & Food svcs	20	*	351	*	106
Arts, Entertainment, & Recreation	*	*	111		*
Other svcs (except Public Administration)	22	35	130	14	39
Unclassifiable/unknown industry					
Total Government	129	98	687	83	168
Federal Government		10	77	5	13
State Government	13	13	246		2
Local/Municipal Government	116	76	365	78	153

* Industry employment suppressed by CT Dept. of Labor

Source: CT Dept. of Labor



Figure 59 – Part C

Employment by Industry in the Region, 2010 (3 of 4)

Ind Name	Norfolk	North Canaan	Roxbury	Salisbury	Sharon
Total - All Industries	406	1,905	304	1,989	1,165
Agriculture, Forestry, Fishing & Hunting	*	41	18	13	*
Utilities					*
Mining		34			
Construction	17	79	48	49	60
Manufacturing	*	607	*	*	*
Transportation & Warehousing	*	*	*	11	
Wholesale Trade	*	*	14	*	17
Retail Trade	16	235	*	106	44
Information	*	*	8	85	*
Finance & Insurance	24	15	7	54	25
Real Estate & Rental & Leasing	*	*	*	8	3
Professional, Scientific, & Technical svcs	30	16	14	45	13
Admin & Waste Mngmnt & Remediation svcs	51	65	33	42	65
Management of Companies & Enterprises		*	*	*	
Health Care & Social Assistance	*	359	18	222	667
Educational svcs	*	*	*	634	*
Accommodation & Food svcs	*	118	*	300	*
Arts, Entertainment, & Recreation	*	*	*	*	60
Other svcs (except Public Administration)	22	28	43	93	110
Unclassifiable/unknown industry					*
Total Government	57	153	64	106	82
Federal Government	6	2	8	11	6
State Government	1	62	1	1	
Local/Municipal Government	50	89	55	94	76

* Industry employment suppressed by CT Dept. of Labor

Source: CT Dept. of Labor



Figure 59 – Part D

Employment by Industry in the Region, 2010 (4 of 4)

Ind Name	Torrington	Warren	Washington	Winchester
Total - All Industries	15,268	154	1,512	3,358
Agriculture, Forestry, Fishing & Hunting	*		*	
Utilities	88			
Mining				
Construction	1,141	4	53	71
Manufacturing	1,825	11	29	762
Transportation & Warehousing	*			68
Wholesale Trade	339	*	9	130
Retail Trade	2,578	*	117	387
Information	104	7	20	55
Finance & Insurance	369		48	52
Real Estate & Rental & Leasing	89		21	*
Professional, Scientific, & Technical svcs	213	7	62	60
Admin & Waste Mngmnt & Remediation svcs	540	22	55	23
Management of Companies & Enterprises	*			68
Health Care & Social Assistance	3,468		*	401
Educational svcs	*		264	122
Accommodation & Food svcs	880	*	277	224
Arts, Entertainment, & Recreation	143		105	*
Other svcs (except Public Administration)	680	10	61	119
Unclassifiable/unknown industry				
Total Government	1,781	26	228	782
Federal Government	106		16	31
State Government	492		1	278
Local/Municipal Government	1,184	26	211	474

* Industry employment suppressed by CT Dept. of Labor

Source: CT Dept. of Labor



Figure 60 compares the change in wages per employee between 2000 and 2010 for Connecticut and the Torrington LMA across all industry sectors. Figure 61 shows the dollar value change from 2000 to 2010 for the wages in all industries in the State of Connecticut as compared to those in the Torrington Labor Market Area. While both areas saw an increase in wages, the LMA's growth (approximately \$7,400) was about half that of the State (approximately \$14,000), and the average wages in the LMA in 2010 were nearly \$20,000 less than that in the state as a whole. Wages in the LMA have fallen farther behind statewide wages between 2000 and 2010 – from a difference of about \$13,000 per employee in 2000 to about \$19,500 in 2010.

Figure 60

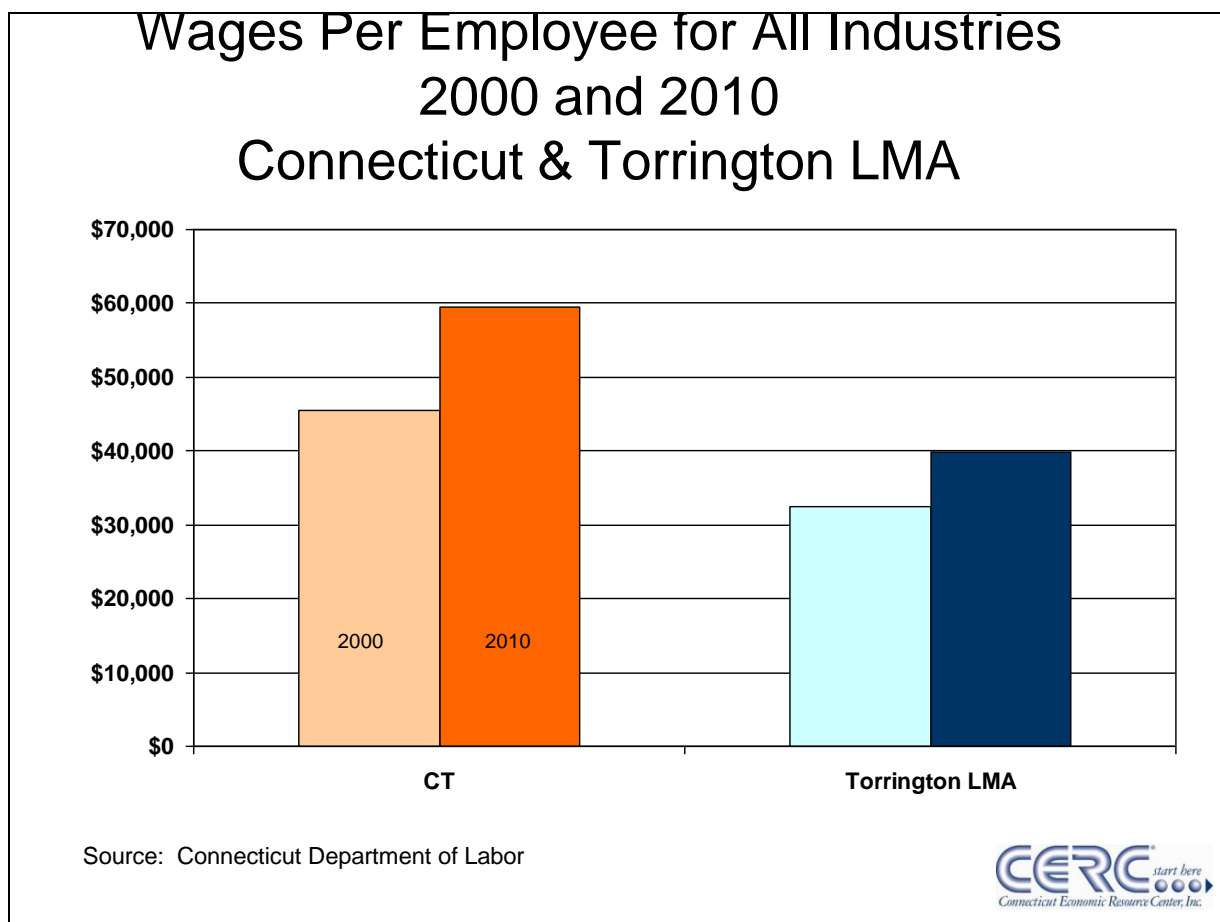


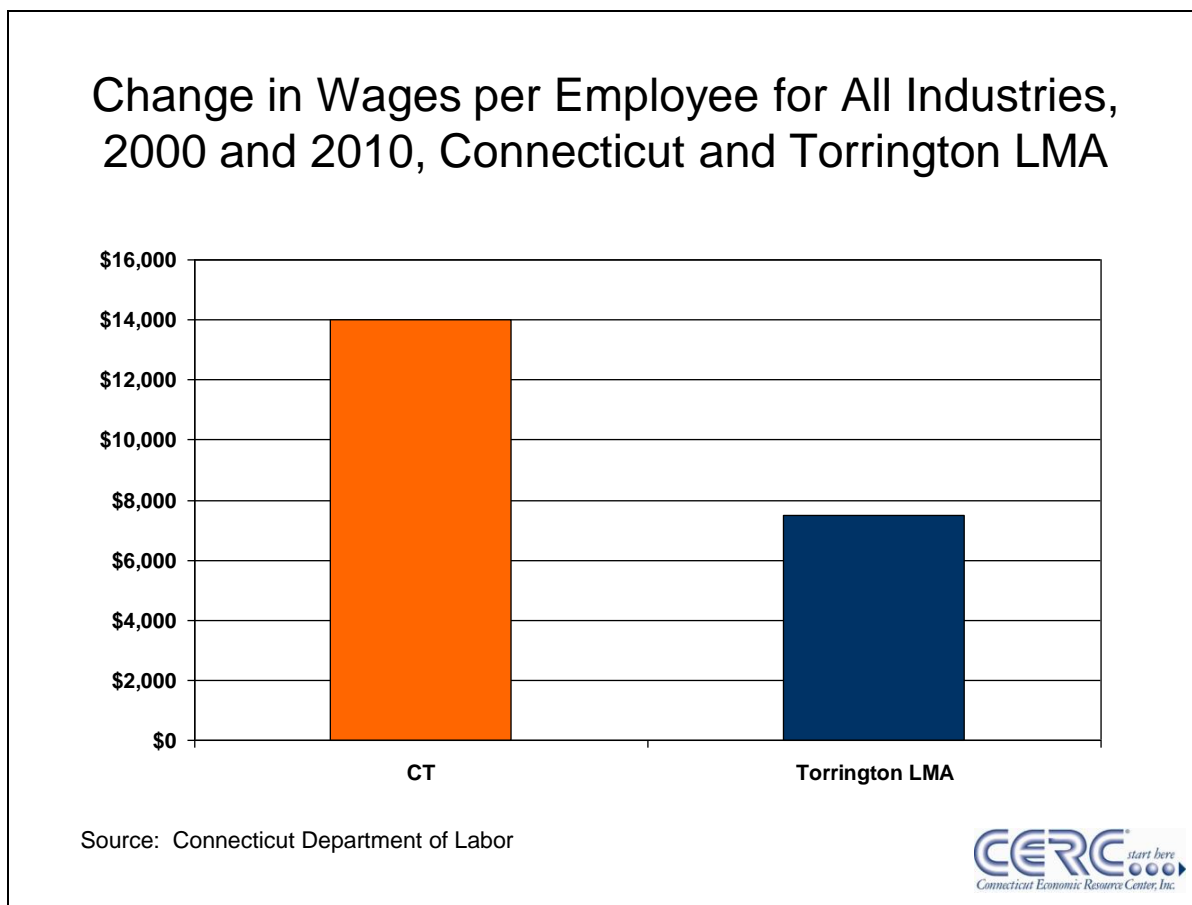
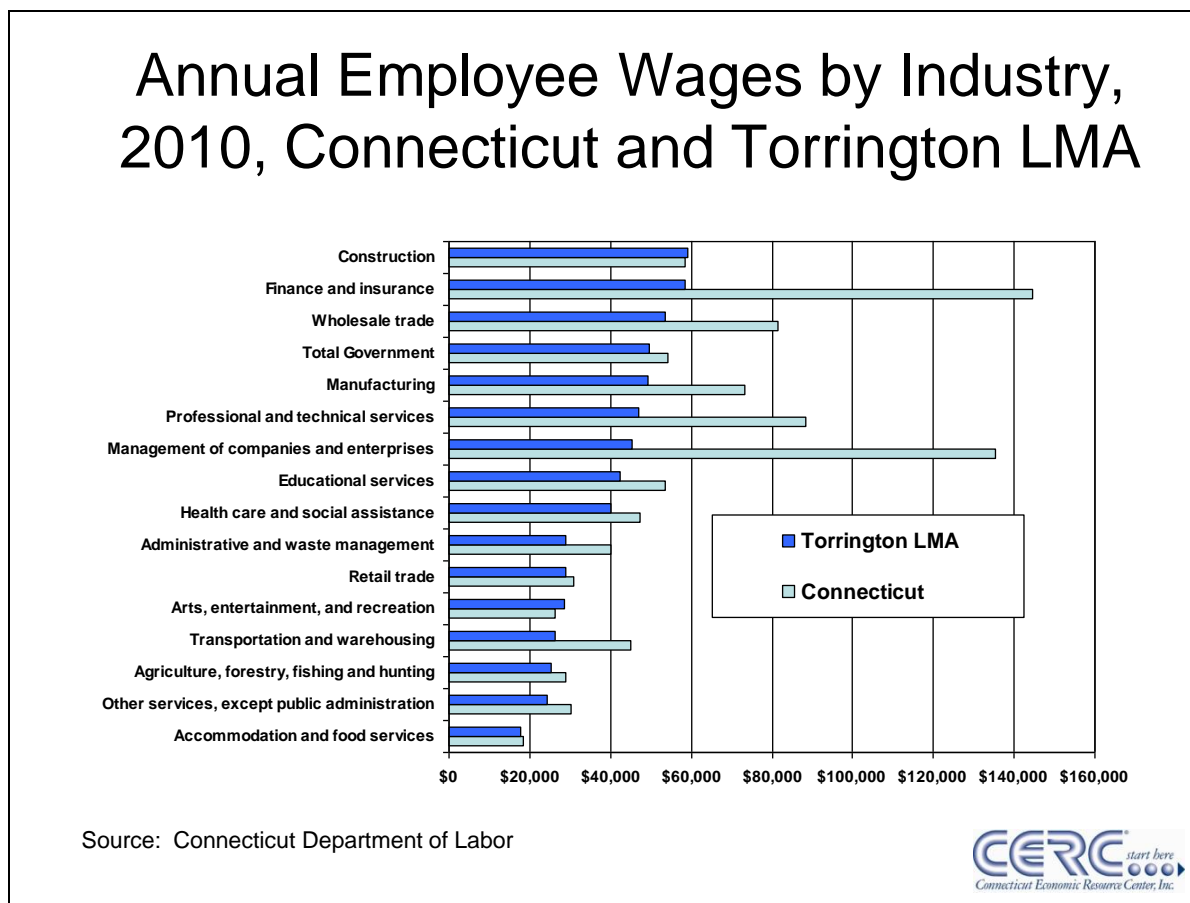
Figure 61

Figure 62 compares the annual wages by industry in 2010 for the Torrington LMA and Connecticut. Other than in the construction and arts, entertainment and recreation sectors, wages in the region are below those in the state for each sector. Wages for residents of the region particularly lag similar positions statewide in finance and insurance, professional and technical services, and management of companies and enterprises.

Figure 62



Implications

- There is a need to increase the annual earnings of the residents of the region to keep pace with earnings across the state. The region's lower average annual earnings are in part a reflection of the significant level of employment in the region in retail trade and accommodations and food services, both frequently lower wage jobs.
- Increasing the annual earnings of the region's residents will depend on the region's ability to recruit or create jobs in higher paying sectors such as finance and insurance, manufacturing, professional and technical services, and management of companies and enterprises.

Figure 63 Parts A - D compare 2010 earnings by industry for the region's 20 communities. As with some earlier Figures, some data has been suppressed by the CT Department of Labor where there are a limited number of establishments in a community and the display of the data would allow identification of specific employers.

Table 5 shows both the highest and lowest wage private sector jobs held by residents of the region by their place of residence in 2011. Jobs in government either at the municipal, state or federal level are not included. Of particular note, jobs in the Accommodation & Food Services sector – one of the major employment sectors in the region – are the most common lowest wage job category.

Table 5
Highest and Lowest Wage Jobs by Community, 2011

Community	Highest Wage Jobs	Lowest Wage Jobs
Barkhamsted	Wholesale Trade	Accommodation & Food Services
Canaan	Wholesale Trade	Real Estate & Rental & Leasing
Colebrook	Not Available	Not Available
Cornwall	Admin & Waste management & Remediation Services	Retail Trade
Goshen	Admin & Waste management & Remediation Services	Real Estate & Rental & Leasing
Hartland	Construction	Other Services (except Public Admin)
Harwinton	Professional, Scientific & Technical Services	Accommodation & Food Services
Kent	Wholesale Trade	Retail Trade
Litchfield	Finance & Insurance	Accommodation & Food Services
Morris	Other Services (except Admin)	Retail Trade
New Hartford	Wholesale Trade	Accommodation & Food Services
Norfolk	Retail Trade	Other Services (except Admin)
North Canaan	Manufacturing	Accommodation & Food Services
Roxbury	Finance & Insurance	Agriculture, Forestry, Fishing & Hunting
Salisbury	Finance & Insurance	Accommodation & Food Services
Sharon	Professional, Scientific & Technical Services	Accommodation & Food Services
Torrington	Utilities	Accommodation & Food Services
Warren	Professional, Scientific & Technical Services	Retail Trade
Washington	Real Estate & Rental & Leasing	Manufacturing
Winchester	Information	Accommodation & Food Services

Figure 63 – Part A

Employee Wages by Industry in the Region, 2010 (1 of 4)

Ind Name	Barkhamsted	Canaan	Colebrook	Cornwall	Goshen	Hartland
Total - All Industries	*	39,486	*	29,748	30,154	32,446
Agriculture, Forestry, Fishing & Hunting		*		26,766	*	
Utilities		*				
Mining						
Construction	36,383	44,657	*	32,612	48,621	38,757
Manufacturing	53,837	*	*	*	32,968	
Transportation & Warehousing	*				*	*
Wholesale Trade	74,215	56,502		87,341	41,123	*
Retail Trade	31,843	31,716		33,748	31,935	
Information	*	*		91,126	*	
Finance & Insurance	*	49,703	*	*	*	
Real Estate & Rental & Leasing	*	16,332	*	*	23,810	*
Professional, Scientific, & Technical svcs	*	*	*	53,211	30,209	
Admin & Waste Mngmnt & Remediation svcs	*	27,366	*	64,132	30,033	43,422
Management of Companies & Enterprises						
Health Care & Social Assistance	14,176	23,254	*	*	*	
Educational svcs	*	*	*	*	*	*
Accommodation & Food svcs	11,013	*		*	*	*
Arts, Entertainment, & Recreation	*	*		*	*	
Other svcs (except Public Administration)	26,797	20,559	*	31,287	*	28,473
Unclassifiable/unknown industry						
Total Government	51,195	54,106	33,341	34,951	41,946	31,071
Federal Government	38,419	48,083	49,477	42,086	47,882	34,172
State Government	54,420	#VALUE!	22,268	45,861		31,863
Local/Municipal Government	51,124	54,448	32,076	31,167	41,255	30,761

* Industry employment suppressed by CT Dept. of Labor

Source: CT Dept. of Labor



Figure 63 – Part B

Employee Wages by Industry in the Region, 2010 (2 of 4)

Ind Name	Harwinton	Kent	Litchfield	Morris	New Hartford
Total - All Industries	46,598	33,916	37,984	28,664	36,536
Agriculture, Forestry, Fishing & Hunting		*	33,046	*	*
Utilities					
Mining	*				
Construction	55,775	35,151	43,222	25,566	37,929
Manufacturing	40,808	57,427	22,714	35,570	47,032
Transportation & Warehousing	39,178		*	*	28,268
Wholesale Trade	*	*	64,124	*	124,479
Retail Trade	15,275	20,740	32,937	18,223	30,601
Information	*	*	31,339	*	*
Finance & Insurance	*	38,287	63,257	*	56,966
Real Estate & Rental & Leasing	*	42,986	79,662	*	*
Professional, Scientific, & Technical svcs	66,479	28,888	49,688		62,131
Admin & Waste Mngmnt & Remediation svcs	39,645	*	30,205	25,466	21,312
Management of Companies & Enterprises		*	*		
Health Care & Social Assistance	26,838	36,325	32,784	*	21,095
Educational svcs	*	33,486	*	*	17,410
Accommodation & Food svcs	12,818	*	16,825	*	11,749
Arts, Entertainment, & Recreation	*	*	23,257		*
Other svcs (except Public Administration)	27,163	28,975	21,322	38,264	20,876
Unclassifiable/unknown industry					
Total Government	41,502	42,790	55,743	33,924	42,467
Federal Government		43,764	30,196	48,988	45,429
State Government	43,844	59,058	68,370		101,935
Local/Municipal Government	41,242	39,972	52,634	32,952	41,461

* Industry employment suppressed by CT Dept. of Labor

Source: CT Dept. of Labor



Figure 63 – Part C

Employee Wages by Industry in the Region, 2010 (3 of 4)

Ind Name	Norfolk	North Canaan	Roxbury	Salisbury	Sharon
Total - All Industries	31,483	43,231	36,908	43,806	43,863
Agriculture, Forestry, Fishing & Hunting	*	25,879	16,322	28,750	*
Utilities					*
Mining		42,990			
Construction	29,936	49,414	47,105	41,769	41,216
Manufacturing	*	60,068	*	*	*
Transportation & Warehousing	*	*	*	20,861	
Wholesale Trade	*	*	63,409	*	65,068
Retail Trade	42,054	31,744	*	30,317	41,126
Information	*	*	31,606	52,749	*
Finance & Insurance	83,449	48,848	115,867	104,641	38,621
Real Estate & Rental & Leasing	*	*	*	31,101	49,963
Professional, Scientific, & Technical svcs	47,026	40,120	32,033	76,380	87,676
Admin & Waste Mngmnt & Remediation svcs	24,315	32,387	31,466	35,674	38,894
Management of Companies & Enterprises		*	*	*	
Health Care & Social Assistance	*	34,433	27,101	36,011	44,955
Educational svcs	*	*	*	50,583	*
Accommodation & Food svcs	*	14,430	*	20,168	*
Arts, Entertainment, & Recreation	*	*	*	*	38,749
Other svcs (except Public Administration)	21,050	34,444	34,638	30,170	41,776
Unclassifiable/unknown industry					*
Total Government	39,633	47,024	35,747	48,716	37,760
Federal Government	33,323	31,517	39,454	47,204	42,611
State Government	79,971	67,416	79,971	79,971	
Local/Municipal Government	39,583	33,076	34,444	48,562	37,376

* Industry employment suppressed by CT Dept. of Labor

Source: CT Dept. of Labor



Figure 63 – Part D

Employee Wages by Industry in the Region, 2010 (4 of 4)

Ind Name	Torrington	Warren	Washington	Winchester
Total - All Industries	41,302	37,782	41,868	39,748
Agriculture, Forestry, Fishing & Hunting	*		*	
Utilities	100,404			
Mining				
Construction	72,611	34,154	39,583	32,080
Manufacturing	48,491	38,810	31,124	50,068
Transportation & Warehousing	*			28,566
Wholesale Trade	56,074	*	35,469	39,350
Retail Trade	27,798	*	29,716	30,166
Information	67,187	48,931	34,446	66,813
Finance & Insurance	58,022		56,670	31,560
Real Estate & Rental & Leasing	34,159		155,034	*
Professional, Scientific, & Technical svcs	47,587	69,466	44,849	40,166
Admin & Waste Mngmnt & Remediation svcs	22,283	28,237	56,640	26,532
Management of Companies & Enterprises	*			57,309
Health Care & Social Assistance	42,527		*	34,859
Educational svcs	*		45,115	45,601
Accommodation & Food svcs	15,082	*	25,416	12,646
Arts, Entertainment, & Recreation	16,600		38,374	*
Other svcs (except Public Administration)	19,495	58,962	33,358	16,951
Unclassifiable/unknown industry				
Total Government	52,880	50,069	52,538	47,144
Federal Government	61,695		46,745	67,490
State Government	58,353		79,971	36,278
Local/Municipal Government	49,818	50,069	52,845	52,195

* Industry employment suppressed by CT Dept. of Labor

Source: CT Dept. of Labor



Implication

- A focus of the region's economic development efforts should be on adding more businesses in higher wage occupational sectors to improve the standard of living of the region's residents and offer employment that would attract or retain residents with higher job skills and wage expectations.

Municipal Fiscal Data

Figure 64 – 67 provide data related to the fiscal situation of the region's communities.

Figure 64 shows the per capita Grand List per Capita for each community, the Northwest Connecticut region, and Connecticut. Figure 64 shows that while the region as a whole has a higher Grand List than the State, there is great disparity among the region's 20 communities. Five communities (Washington, Roxbury, Salisbury, Cornwall, and Sharon) have a Grand List per Capita in excess of \$300,000. Conversely, six communities (Torrington, Winchester, Hartland, Barkhamsted, Harwinton, and New Hartford) have a Grand List per Capita less than \$100,000. This includes the two largest population communities who could be expected to have the highest service demands.

Figure 64

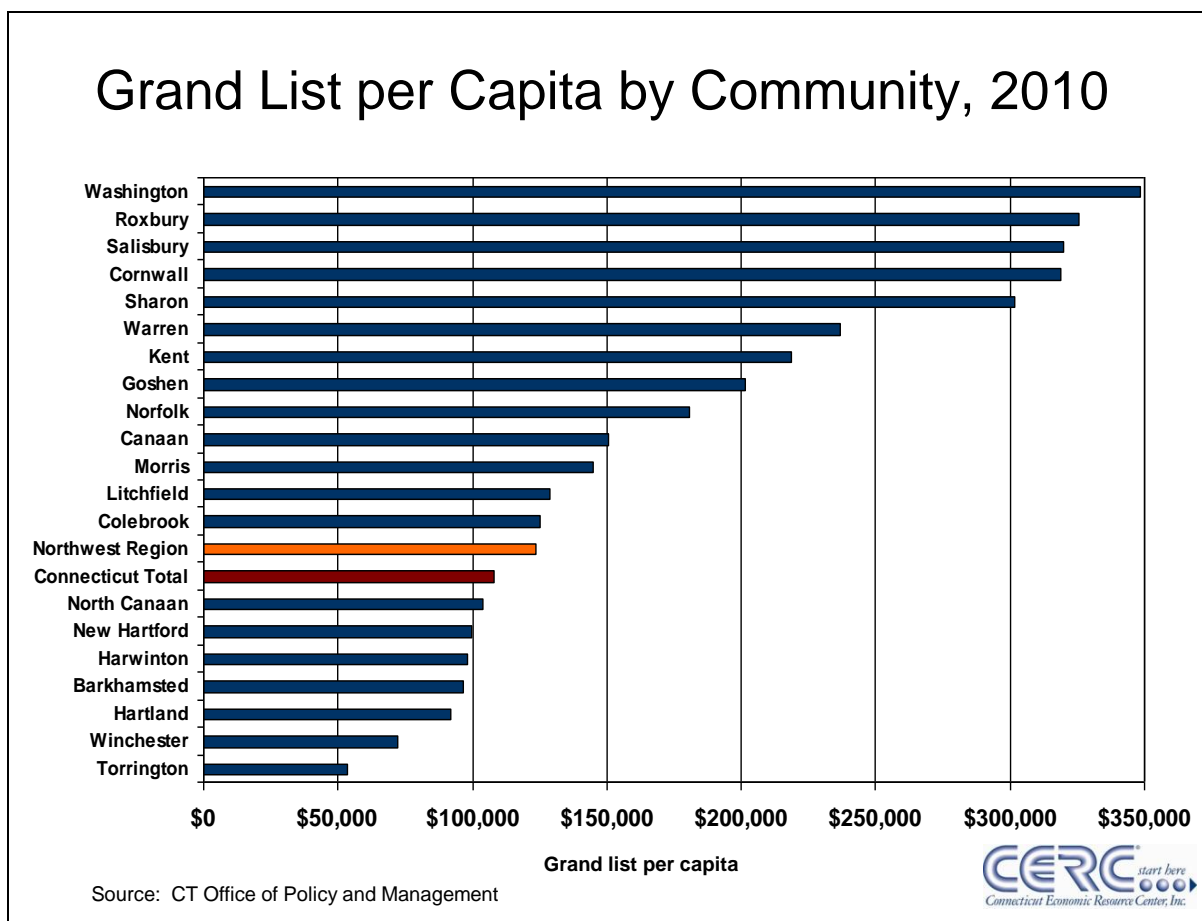


Figure 65 shows how municipal Grand Lists have grown in the 2000 – 2010 decade and compares that with the region and State's Grand List growth. As with the prior Figure 61, great disparities among the region's communities are evident, particularly for Torrington, whose Grand List grew by less than 10 percent during the decade, compared with five communities (Warren, Goshen, Sharon, Roxbury, and Cornwall) that had Grand List Growth of 150 percent or more. In general, Grand List growth in the region has lagged that of the State during the 2000 - 2010 decade.

Figure 65

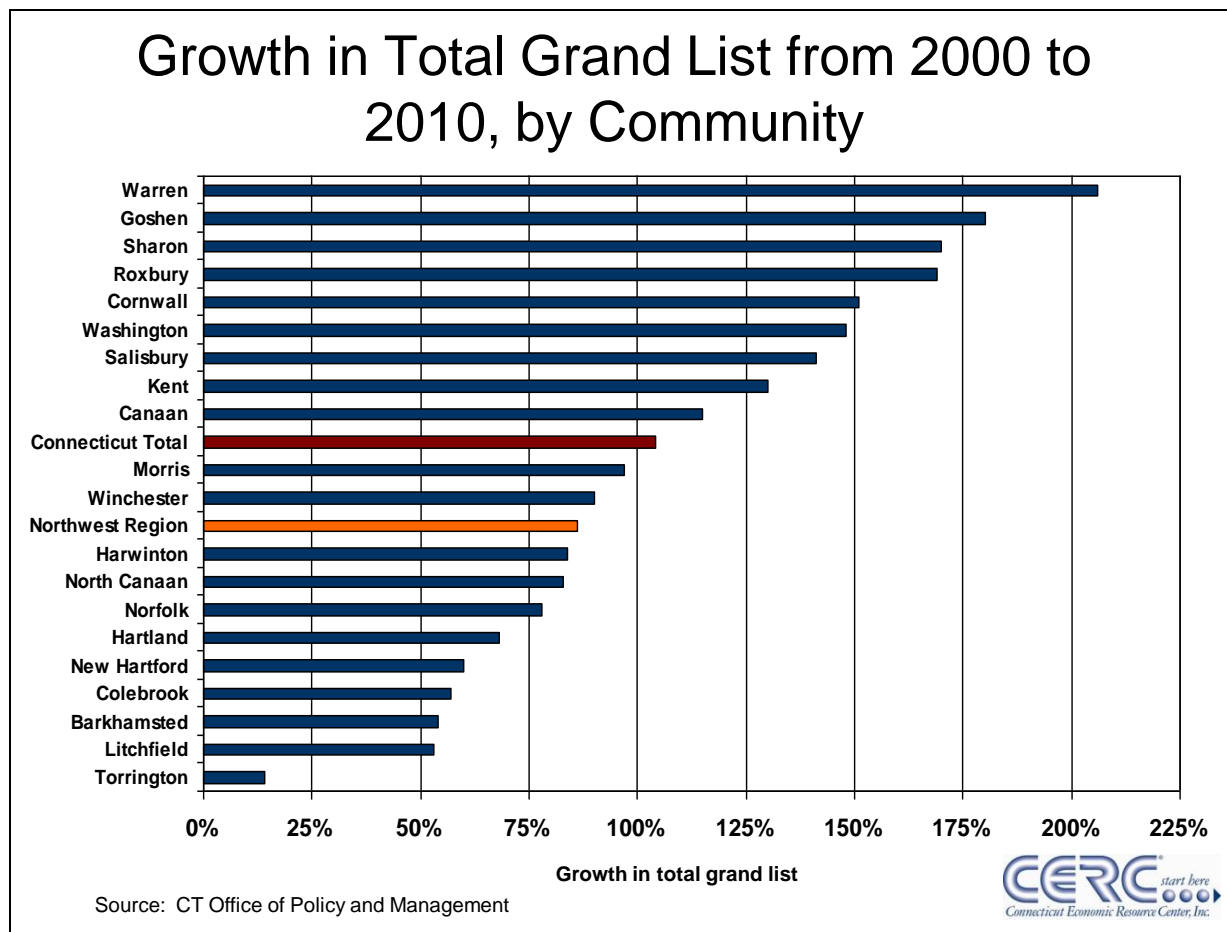


Figure 66 shows the commercial and industrial portion of each community's total Grand List in both 2000 and 2009 and how the region compares with the State. For most communities in the region (as well as the State), the commercial and industrial portion of the total Grand List declined between 2000 and 2009, reflecting the run-up in housing values experienced by much of the country. North Canaan, Torrington, and Canaan were the only exceptions.

Figure 66

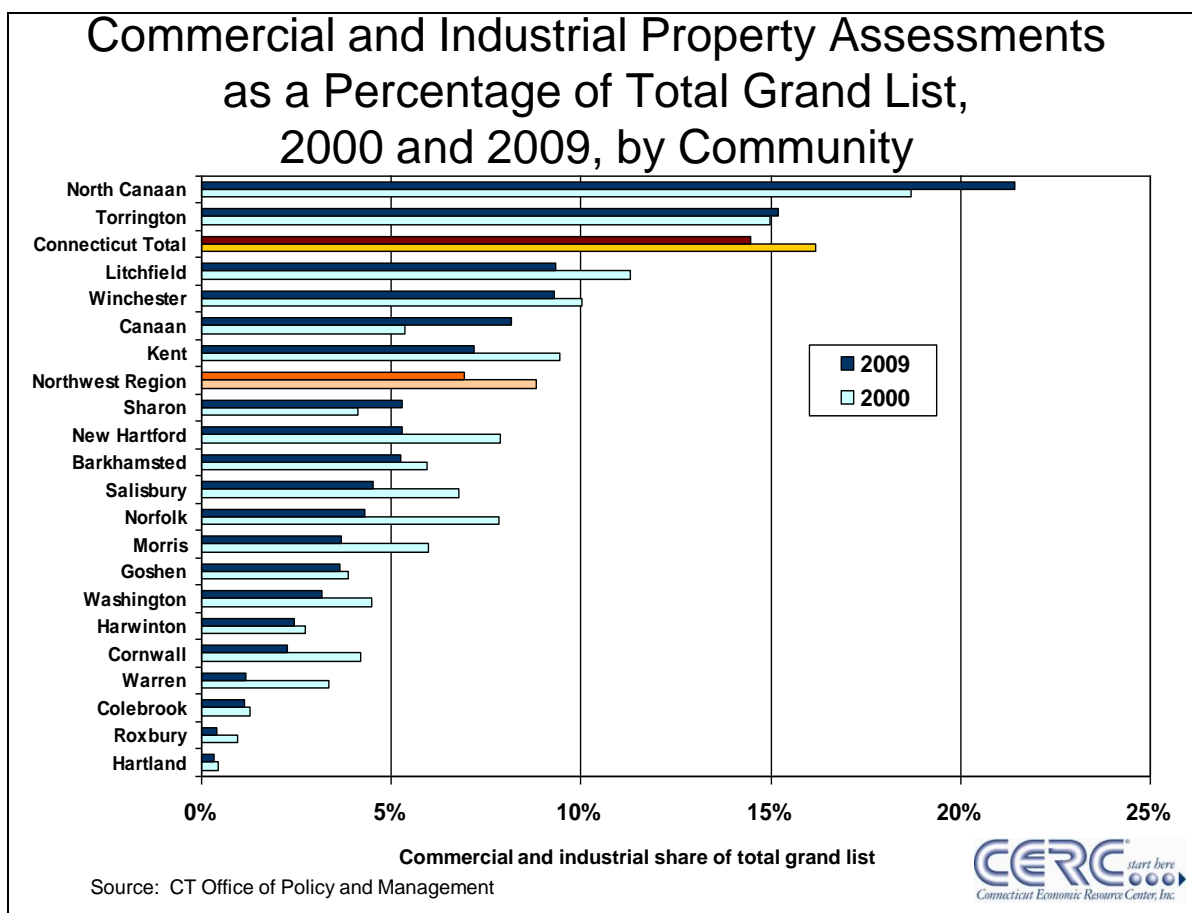


Figure 67 shows the percentage growth between 2000 – 2009 in the commercial and industrial portion of each community's Grand List as well as for the region and State. Only 4 communities in the region (Canaan, Goshen, Sharon, and North Canaan) experienced a higher percentage growth in their Grand Lists than the State as a whole.

Figure 67

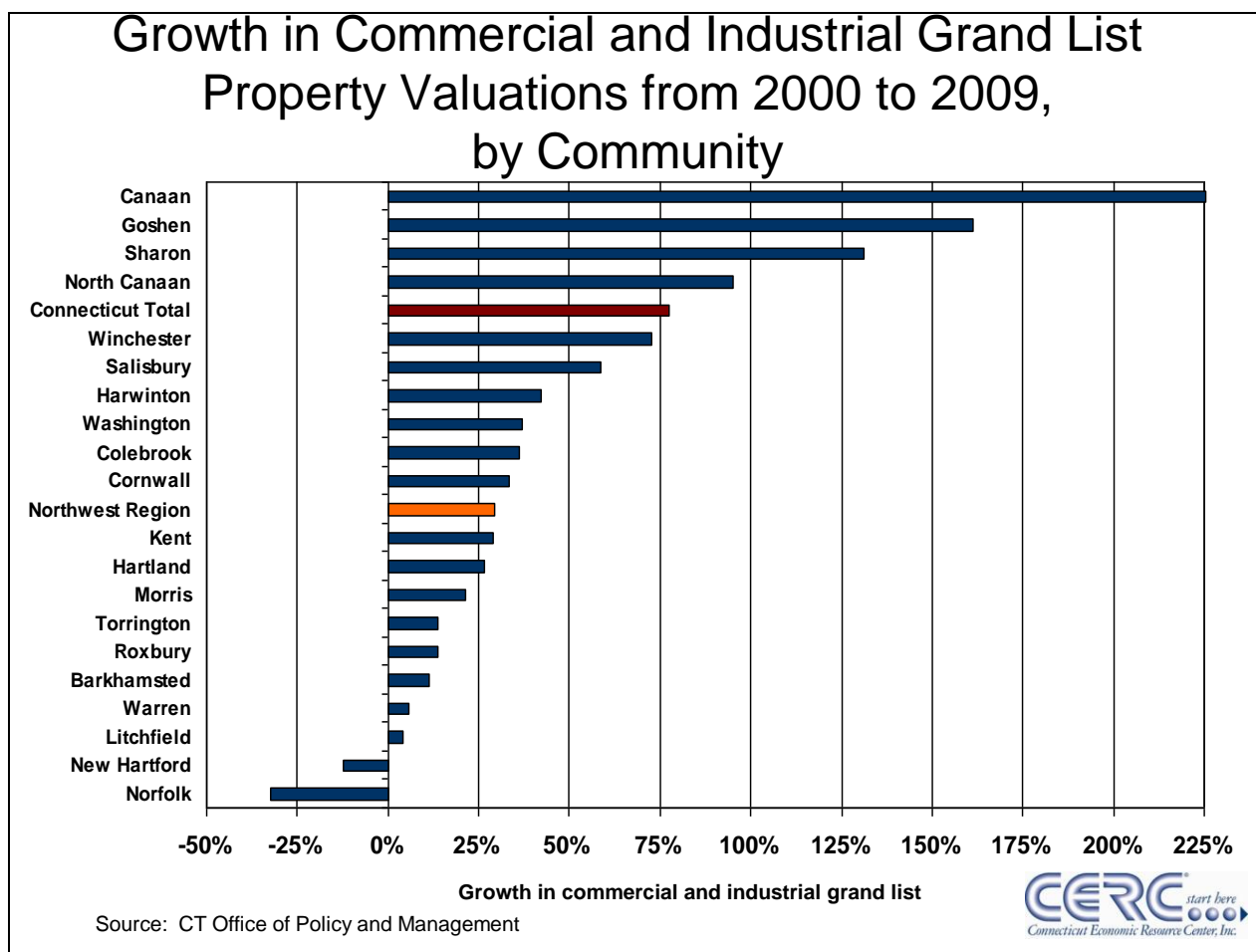


Table 6 shows how the total Grand Lists and business commercial and industrial portion of those Grand Lists for region, State, and regional communities have changed between 2000 and 2009. While Grand Lists grew in all communities, there was a wide range from 202.4 percent in Warren to only 12.0 percent in Torrington. Perhaps more importantly, the great disparities among the region's communities can be seen again in the growth in the business portion of the Grand Lists, which ranged from 225.6 percent in Canaan to an actual decline of 12.2 percent in New Hartford and 32.5 percent in Norfolk.

Table 6

Percentage Growth in Grand List and Commercial & Industrial Portion, 2000-2009

Area	% Growth in Total Grand List – 2000 - 2009	% Growth in Commercial & Industrial Portion of the Grand List – 2000 - 2009
Connecticut	98.9	77.6
Northwest Region	65.7	29.6
Barkhamsted	25.5	11.1
Canaan	113.9	225.6
Colebrook	55.7	36.1
Cornwall	147.8	33.4
Goshen	178.6	161.4
Hartland	67.1	26.7
Harwinton	59.2	42.2
Kent	69.6	29.0
Litchfield	26.3	4.1
Morris	97.3	21.4
New Hartford	31.1	-12.2
Norfolk	22.9	-32.5
North Canaan	70.4	95.2
Roxbury	168.2	13.6
Salisbury	136.7	58.5
Sharon	79.4	131.3
Torrington	12.0	13.8
Warren	202.4	5.7
Washington	94.1	37.0
Winchester	86.2	72.8

Implications

- In a state like Connecticut where municipal budgets are highly dependent on real estate property taxes, growth in the Grand List is necessary to allow for the provision of services at reasonable cost, while accounting for inflation.

- An adequate business portion of the Grand List is often (but not always) desirable to reduce the local tax burden on homeowners. The region's communities show great variations in Grand List per capita and growth in the business portion of their Grand Lists, that may make it increasingly difficult for some to maintain reasonable tax rates, particularly in view of the lingering effects of the most recent recession.
- Additional economic development is necessary in many of the region's communities to maintain a reasonable tax rate.

Summary of the Implications of this Economic & Demographic Analysis

- Because all of the communities in the region are relatively small, none (with the possible exceptions of Torrington, Winchester and Litchfield) can be expected to provide the complete mixture of retail, service, or employment opportunities needed by residents. Rather, these needs must be met on a regional basis.
- The region's lack of population density makes it difficult to justify locating retail and service businesses in many of the smaller communities.
- Larger communities such as Torrington, Winchester and Litchfield have historically been the centers of economic activity and will continue in that role.
- Good road networks are necessary to provide convenient commuting between places of residence and work, and convenient access to necessary goods and services.
- Population growth in the region through 2016 will not justify the establishment of many new businesses that are dependent on serving just regional residents.
- Businesses that serve both the resident population and tourists will have a better chance of succeeding.
- Retail and service businesses that can combine in-shop sales with phone-in order fulfillment and/or Internet sales will have the best chance of succeeding.
- Adequate telecommunications and data transmission services are necessary to support the region's merchants.
- Population growth through 2016 will not markedly increase the region's labor pool.
- Adequate road networks are necessary to provide the largest labor pool for the region's employers, particularly those that do not have close proximity to Route 8.
- The region's aging population and workforce could become a problem in the future for jobs requiring physical labor and for maintaining an adequate number of people in the workforce.
- An increased focus on incumbent worker training may be necessary to assist older workers in obtaining new skills.
- Appropriate employment opportunities and quality of life factors will be critical in retaining the slightly growing "young worker" group in the region.
- There will be an increasing demand for goods and services desired or needed by older residents.
- The region's small, widely mixed, and broadly distributed ethnic population provides limited support for development of any ethnically-focused, niche markets.

- Torrington and Winchester have the greatest potential of developing such an ethnically-focused, niche market over time if the region's minority population continues to grow.
- Growth in the number of households and/or families can indicate a growing need for locally based retail or service establishments and the opportunity to create those types of businesses in growing communities.
- Growth in the number of single-person households would suggest a different market than for family households, with the type of products or services needed varying by age group.
- The region's abundance of vacant dwelling units for seasonal or recreational use hides a small inventory of available rental units.
- The region's lack of rental housing can be an obstacle for attracting and retaining younger workers or others who are unable to cover the down-payment and/or occupancy costs of owning a house.
- Information on Household and Family composition can be important data in identifying retail or service needs and opportunities. As recognized in ESRI's Tapestry Segmentation Manual (see http://www.esri.com/data/esri_data/tapestry for an interactive "poster" summarizing ESRI's 65 market segments), different consumer or lifestyle groups have different characteristics and purchasing preferences and patterns. This type of market segmentation is frequently used by merchants and particularly those in the major chains) in selecting new store locations. Without taking income into account (see the section on Income later in this analysis), but factoring in the age and housing occupancy breakdowns discussed above, a majority of the Northwestern Connecticut population may fall into a combination of three Tapestry Lifestyle Groups in the ESRI Tapestry Manual: Traditional Living, Factories and Farms, and Senior Styles.

The Traditional Living group is described in the manual as follows:

The four segments in *Traditional Living* convey the perception of real middle America—hardworking, settled families. The group's higher median age of 38 years also conveys their lifestage—a number of older residents who are completing their child-rearing responsibilities and anticipating retirement. Even though they're older, many still work hard to earn a modest living. They typically own single-family homes in established, slow-growing neighborhoods. They buy standard, four-door American cars, belong to veterans' clubs and fraternal organizations, take care of their homes and gardens, and rely on traditional media such as newspapers for their news.

The Factories and Farms group is described in the manual as follows:

The segments in the *Factories and Farms* summary group represent rural life—from small towns and villages to farms. Employment in manufacturing and agricultural industries is typical in these small, settled communities across America's breadbasket. Population change is nominal, and the profile is classic. Most households are families, either married couples or married couples with children. By age, the residents of *Factories and Farms* mirror the U.S. distribution, with slightly more retirees. Median

household income is a bit lower, almost \$40,524, but so is the home value of \$92,572. Most own their homes. Their lifestyle reflects their locale, emphasizing home and garden care, fishing and hunting, pets, and membership in local clubs.

The Senior Styles group is described as follows:

More than 14.4 million households in the nine *Senior Styles* segments comprise one of the largest LifeMode summary groups. As the U.S. population ages, two of the fastest growing American markets are found among *The Elders* and the *Silver and Gold* segments. *Senior Styles* segments illustrate the diversity among today's senior markets. Although incomes within this group cover a wide range, the median is \$45,396, attributable mostly to retirement income or Social Security payments. Younger, more affluent seniors, freed of their child-rearing responsibilities, are traveling and relocating to warmer climates. Settled seniors are looking forward to retirement and remaining in their homes. Residents in some of the older, less privileged segments live alone and collect Social Security and other benefits. Their choice of housing depends on their income. This group may reside in single-family homes, retirement homes, or highrises. Their lifestyles can be as diverse as their circumstances, but senior markets do have common traits among their preferences. Golf is their favorite sport; they play and watch golf on TV. They read the newspaper daily and prefer to watch news shows on television. Although their use of the Internet is nearly average, they are more likely to shop through QVC than online.

These descriptions should be useful to the Northwest Connecticut region in identifying the types of retailers or service providers that would have the most patronage from residents.

- The relatively high cost of housing in a high cost state has important implications for the region in being able to provide affordable housing for the region's workforce.
- The high proportion of vacant dwelling units in the region, because they are used for seasonal, recreational, or occasional occupancy, has a bearing on tourism, retail and affordable housing opportunities. There is a noticeable difference between the LHCEO and NWCCOG planning regions in this type of housing.
- The region's lower portion of residents with advanced degrees, and its high percentage of residents with only a high school diploma or GED, may be a weakness in recruiting companies looking for a highly educated workforce.
- In particular, Torrington and Winchester are weak in these educational attainment areas. However, companies locating in these communities can draw from a regional labor pool with a higher level of education.
- An adequate road network is needed to facilitate commuting from place of residence to educational institutions.