

An aerial photograph of a university campus, likely the University of Utah, showing various academic buildings, a large stadium on the left, and surrounding greenery. In the background, a range of mountains is visible under a blue sky with scattered clouds. The campus is densely packed with buildings, many of which have brick facades. There are several parking lots and roads interspersed among the buildings. The trees are in autumn, with many showing yellow and orange foliage. The overall scene is bright and clear, suggesting a sunny day.

2025 TALENT SUMMIT

WORKFORCE UPDATE



TOM STELLMAN & ERICA COLSTON | APRIL 23, 2025



THEORY INTO PRACTICE

Committed to **holistic thinking** and
sustainable development.

We design strategies that will
support your community's
vision for the future.

1995

YEAR FOUNDED

600+

ENGAGEMENTS

425+

CLIENTS

44

STATES

7

COUNTRIES



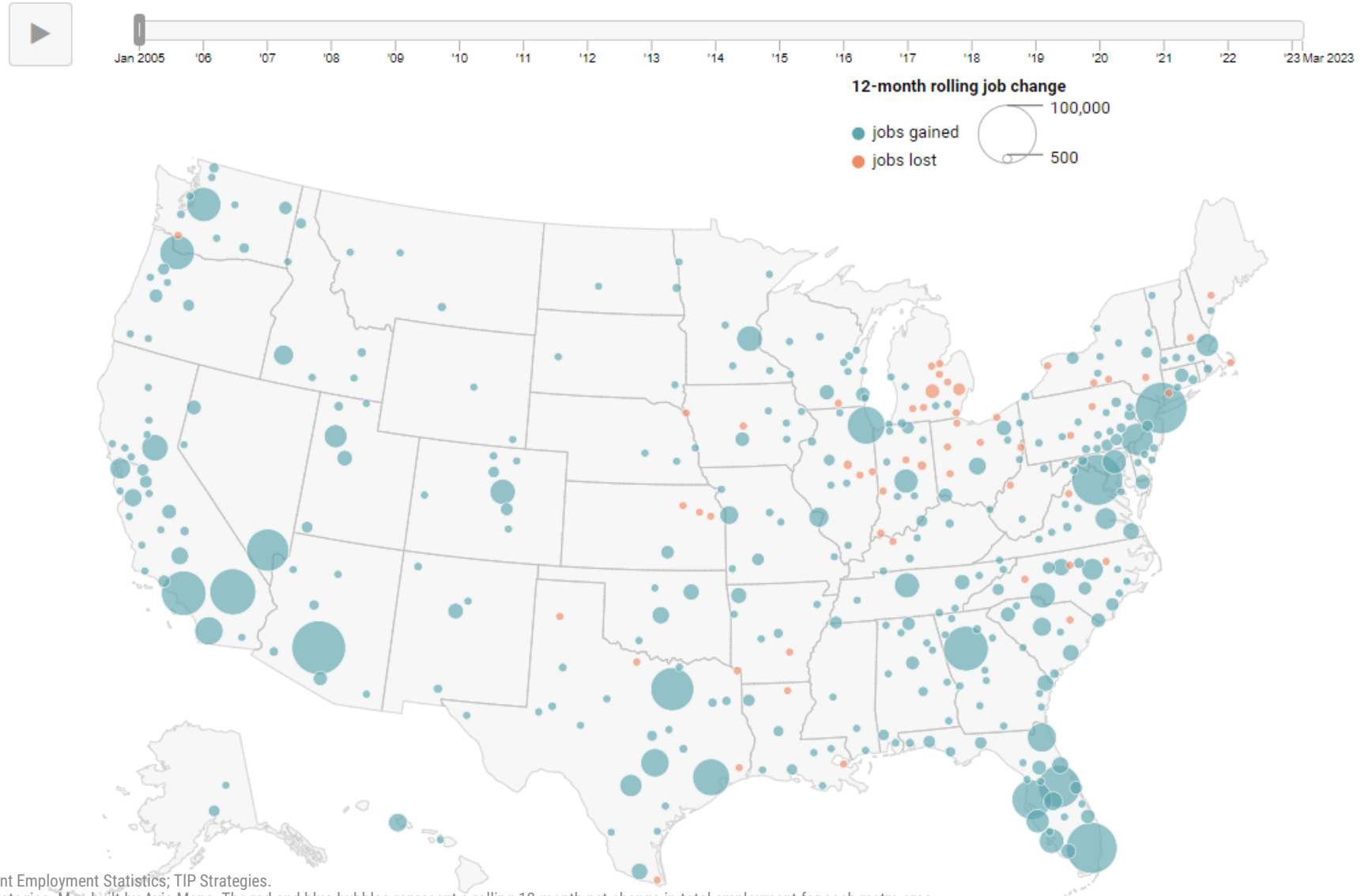
TRENDS

The background features a solid orange field on the left. On the right, there are several overlapping, slanted rectangular shapes in varying shades of orange and light orange, creating a dynamic, layered effect.

THE GEOGRAPHY OF JOBS & RECOVERY

Net Job Gains/Losses by Metropolitan Statistical Area

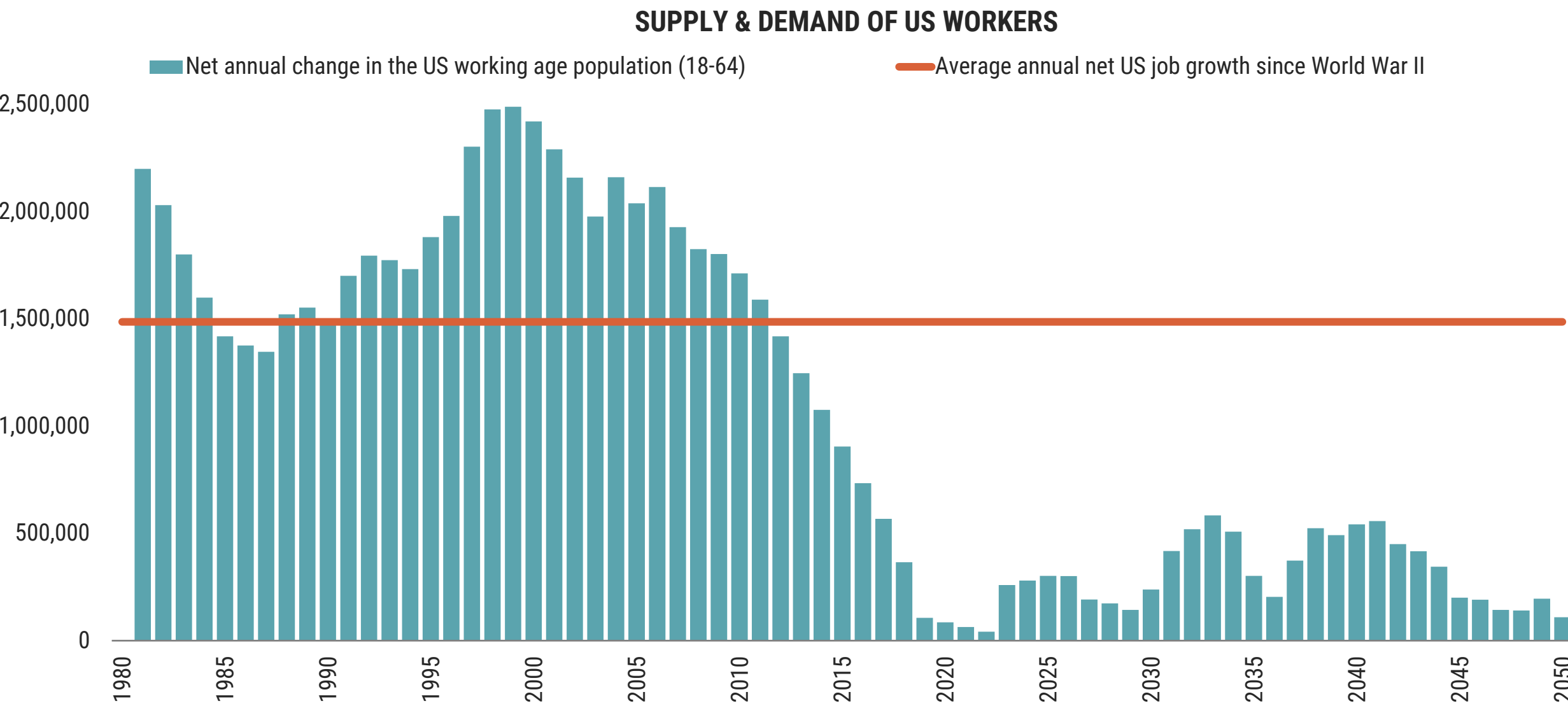
Jan 2005



Source: US Bureau of Labor Statistics, Current Employment Statistics; TIP Strategies.

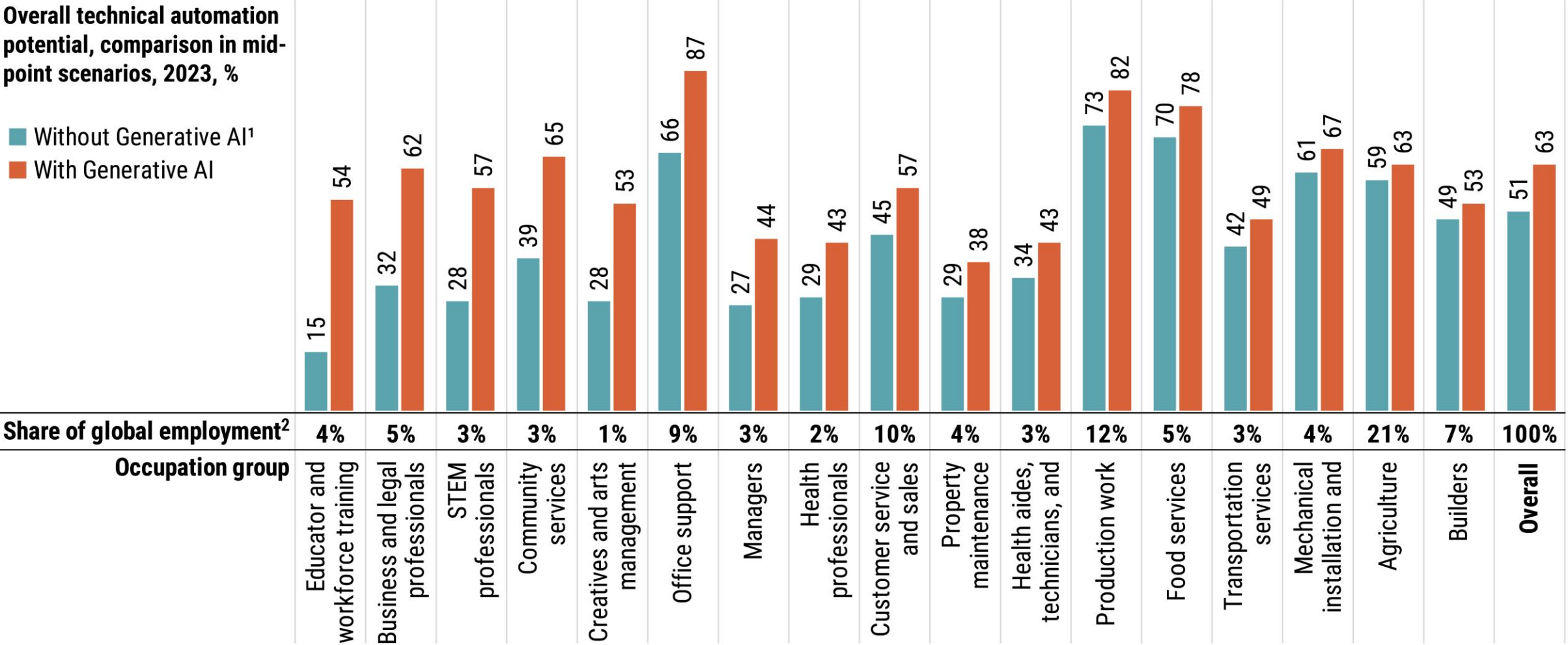
Notes: Map concept and research by TIP Strategies. Map built by Axis Maps. The red and blue bubbles represent a rolling 12-month net change in total employment for each metro area.

THE US LABOR SUPPLY FACES LONG-TERM PRESSURE



Source: US Census Bureau, International Database; US Bureau of Economic Analysis, Current Employment Statistics; TIP Strategies, Inc.
Notes: Population estimates and projections are for the resident population. The US population components shown in the IDB may not match the official population components for the United States, in part, due to differences in how they are displayed (calendar year versus midyear-to-midyear estimates).

IMPACT OF GENERATIVE AI ON TECHNICAL AUTOMATION

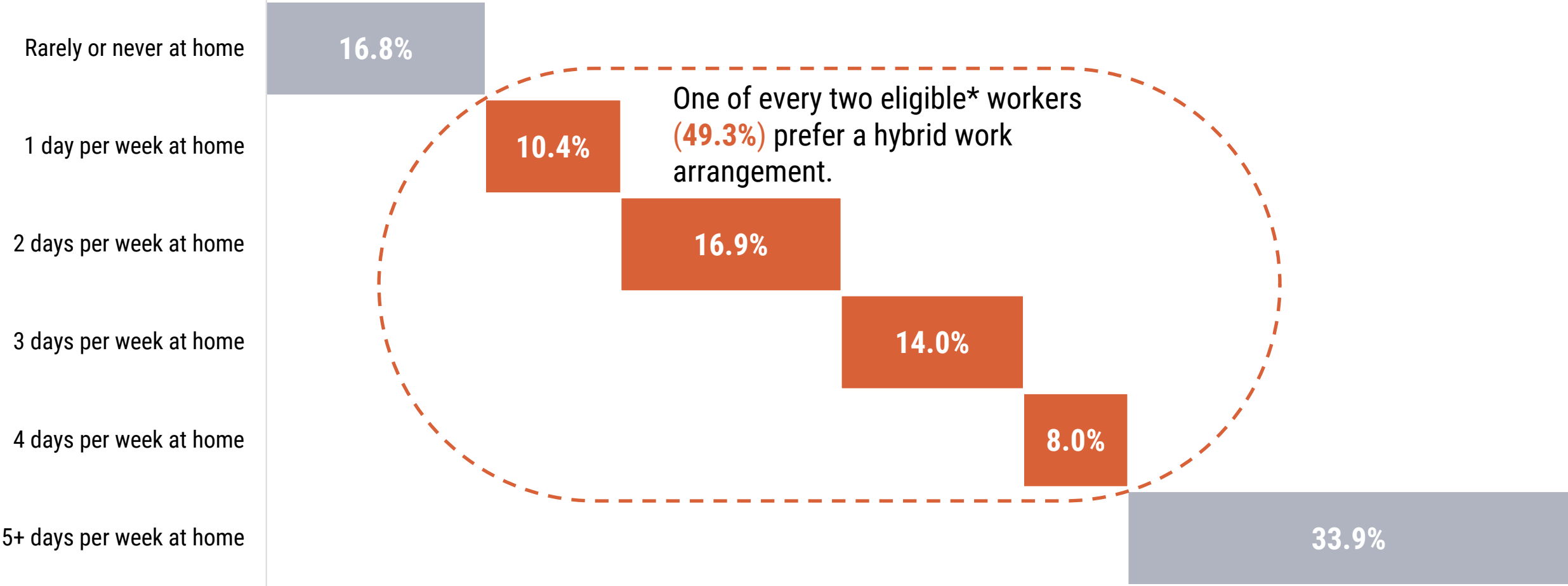


¹Previous assessment of work automation before the rise of generative AI.
²Includes data from 47 countries, representing about 80% of employment across the world.
Source: McKinsey Global Institute analysis
Note: Figures may not sum, because of rounding.

COMPLICATED LIVES REQUIRE FLEXIBLE SCHEDULES

Nearly half of workers who can work from home prefer a hybrid arrangement.

NUMBER OF WORK-FROM-HOME DAYS PREFERRED BY ELIGIBLE* WORKERS



*Eligible workers are those whose occupations are compatible with working from home. The Survey of Working Arrangements and Attitudes (SWAA) is a rolling monthly survey of between 2,500 to 10,000 US residents aged between 20 and 64 who earned \$10,000+ in the prior year and hold jobs with work-from-home compatibility. The sample covers N=8088 responses from the December 2024 to March 2025 monthly waves of the SWAA.
Source: Survey of Working Arrangements and Attitudes (SWAA); Barrero, Jose Maria, Nicholas Bloom, and Steven J. Davis, 2021. "Why working from home will stick," National Bureau of Economic Research Working Paper 28731.

FACTORS INFLUENCING ADVANCED TECHNOLOGY



Market Conditions



Trade Policy



CHIPS & Science Act



Labor Market Trends

FEDERAL FUNDING IMPACT

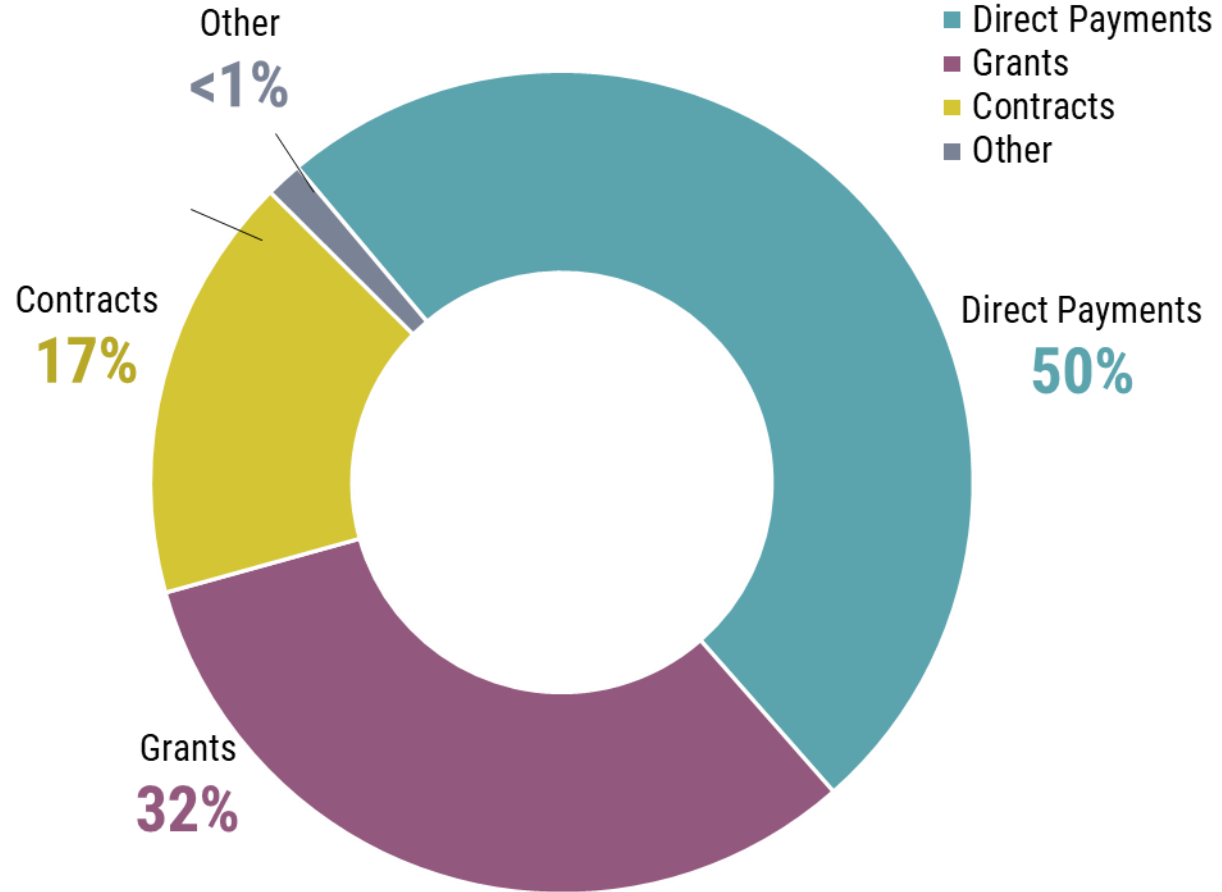
Federal outlays to Colorado in FY2024

WHERE THE MONEY WENT IN FY2024

US federal outlays to Colorado

\$21.6 billion

based on 41,921 awards



THE FEDERAL WORKFORCE IN COLORADO

Agency	Jobs	Pct. of Total
Veterans Health Administration	6,877	16.7%
US Forest Service	2,243	5.4%
US Space Force	2,036	4.9%
Military Treatment Facilities	1,642	4.0%
National Park Service	1,381	3.4%
US Air Force Academy	1,309	3.2%
US Bureau of Reclamation	1,161	2.8%
US Geological Survey (USGS)	1,086	2.6%
Office of the Secretary of the Interior	1,056	2.6%
Federal Aviation Administration (FAA)	1,036	2.5%
US Bureau of Land Management (BLM)	982	2.4%
US Department of Energy	926	2.2%
Environmental Protection Agency (EPA)	713	1.7%
Internal Revenue Service (IRS)	668	1.6%
US Army Installation Management Command	665	1.6%
Social Security Administration	628	1.5%
Veterans Benefits Administration	627	1.5%
National Institute of Standards & Technology (NIST)	559	1.4%
Bureau of Prisons/Federal Prison System	547	1.3%
Federal Emergency Management Agency (FEMA)	533	1.3%
<i>Other Agencies (<500 employees in Colorado)</i>	<i>14,492</i>	<i>35.2%</i>
Total Federal Employment in Colorado	41,167	100.0%

Federal Agencies with 500+ Colorado employees

- Defense (DoD)
- Veterans Administration
- Other Civilian Agencies

Source: US Office of Personnel Management.
Notes: Federal civilian and military workforce reported as of September 2024.

FEDERAL RESEARCH SPENDING IN COLORADO IN FY2024



\$567 million
1,303 awards

TOP 10 RECIPIENTS	
1	University of Colorado-Denver
2	University of Colorado
3	Colorado State University
4	National Jewish Health
5	Palantir Technologies, Inc.
6	University of Denver
7	Crestone, Inc.
8	Point Designs, LLC
9	Klein Buendel, Inc.
10	Bolder Biotechnology, Inc.



\$362 million
275 awards

TOP 10 RECIPIENTS	
1	University of Colorado-Boulder
2	Colorado State University
3	Colorado School of Mines
4	University Corporation for Atmospheric Research (UCAR)
5	University of Colorado-Colorado Springs
6	University of Colorado-Denver
7	University of Denver
8	Rocky Mountain Biological Laboratory
9	Colorado College
10	Space Science Institute

NORTHERN COLORADO

NORTHERN COLORADO WORKFORCE ANALYSIS



NORTHERN COLORADO BASELINE

DEMOGRAPHICS

Population Trend	Population Comparison
Population Drivers	Population Share of Region
Socioeconomic Comparison	Socioeconomic Map

EMPLOYMENT

Employment Trend	Employment Share of Region
Employment Recovery	Employment Annual Change

INDUSTRIES

Industry Employment	Industry Share of Region
Industry Trends	Industry Net Change
Industry Concentration	

OCCUPATIONS

Occupation Groups	Occupation Trends
Net Job Change by Occupation	Jobs vs Resident Workers



TALENT SUPPLY

COMMUTING

Commuting Trends	Commuting Demographics
Where Residents Work	Where Workers Live

POSTSECONDARY AWARDS & PROGRAMS

Awarding Institutions Map	
General Program Distribution	General Program Trends
Detailed Program Distribution	Detailed Program Trends

ALTERNATIVE CAREER PATHS

Apprentice Organizations
Apprenticeship Trends
Apprentices in Targets



TALENT DEMAND

DEFINING THE TARGET SECTORS

Target Definitions

DEMAND PATTERNS

Employer Demand Patterns	Occupations in Demand
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TALENT FACTORS

Qualifications
Skills in Demand
Credentials Required

DEMOGRAPHICS & EARNINGS

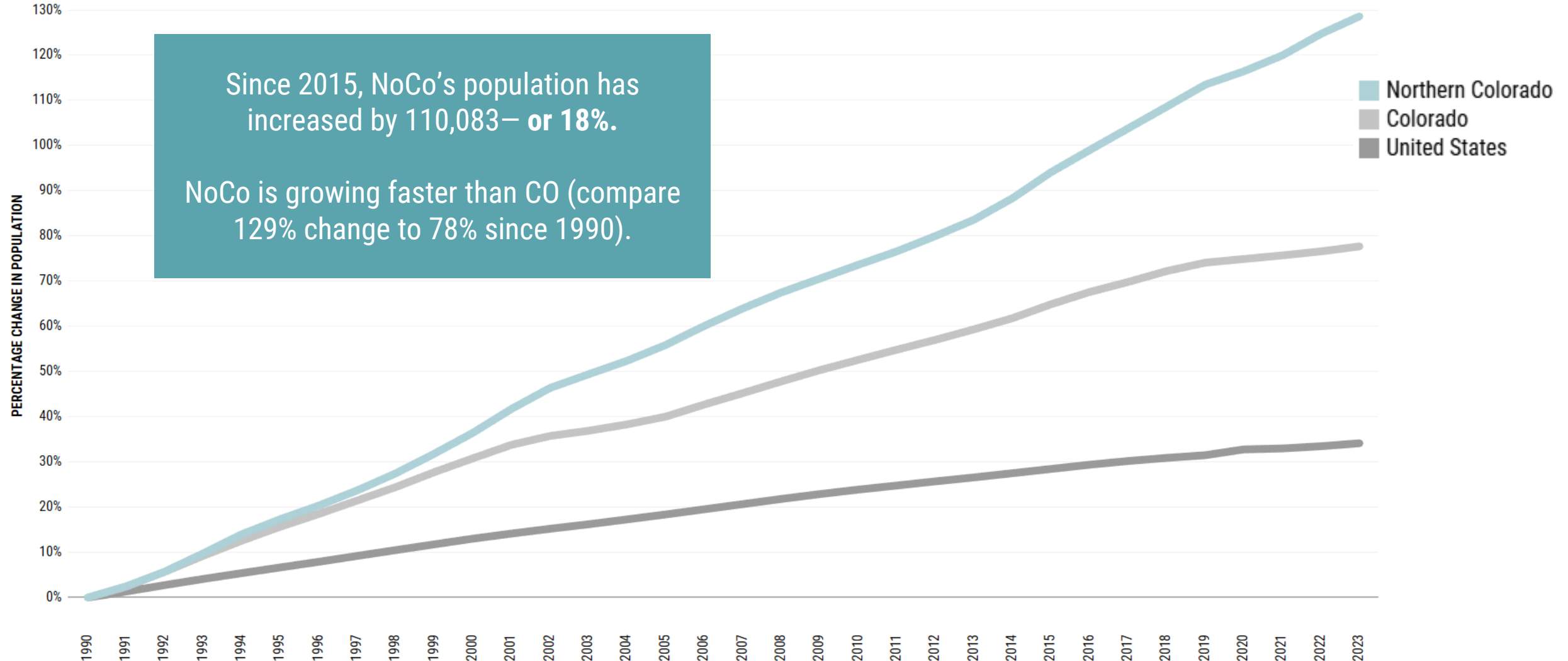
Demographics	Earnings
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CAPACITY FOR GROWTH

Target "What If...?" Scenarios

POPULATION | COMPARATIVE CHANGE

Northern Colorado (Larimer and Weld Counties), compared to CO & US

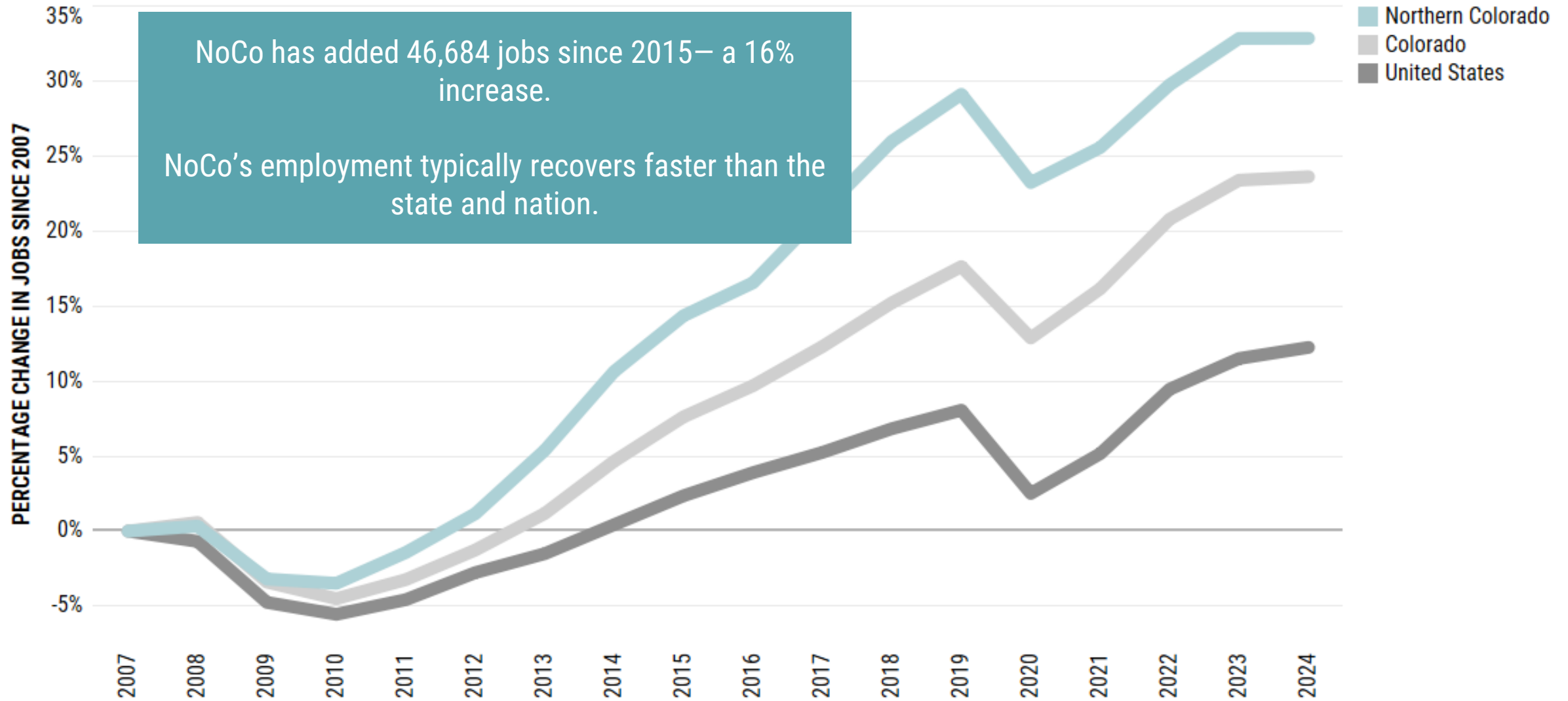


Sources: US Census Bureau, Population Estimates Program; Moody's Analytics; TIP Strategies, Inc.

Notes: Population estimates prior to 2010 are sourced from Moody's Analytics. Estimates from 2010 to 2023 are sourced from the Census Bureau's Population Estimates Program vintages 2020 and 2023. The Northern Colorado region consists of Larimer and Weld Counties, CO.

REGIONAL EMPLOYMENT GROWTH

State and National Averages Since the Great Recession

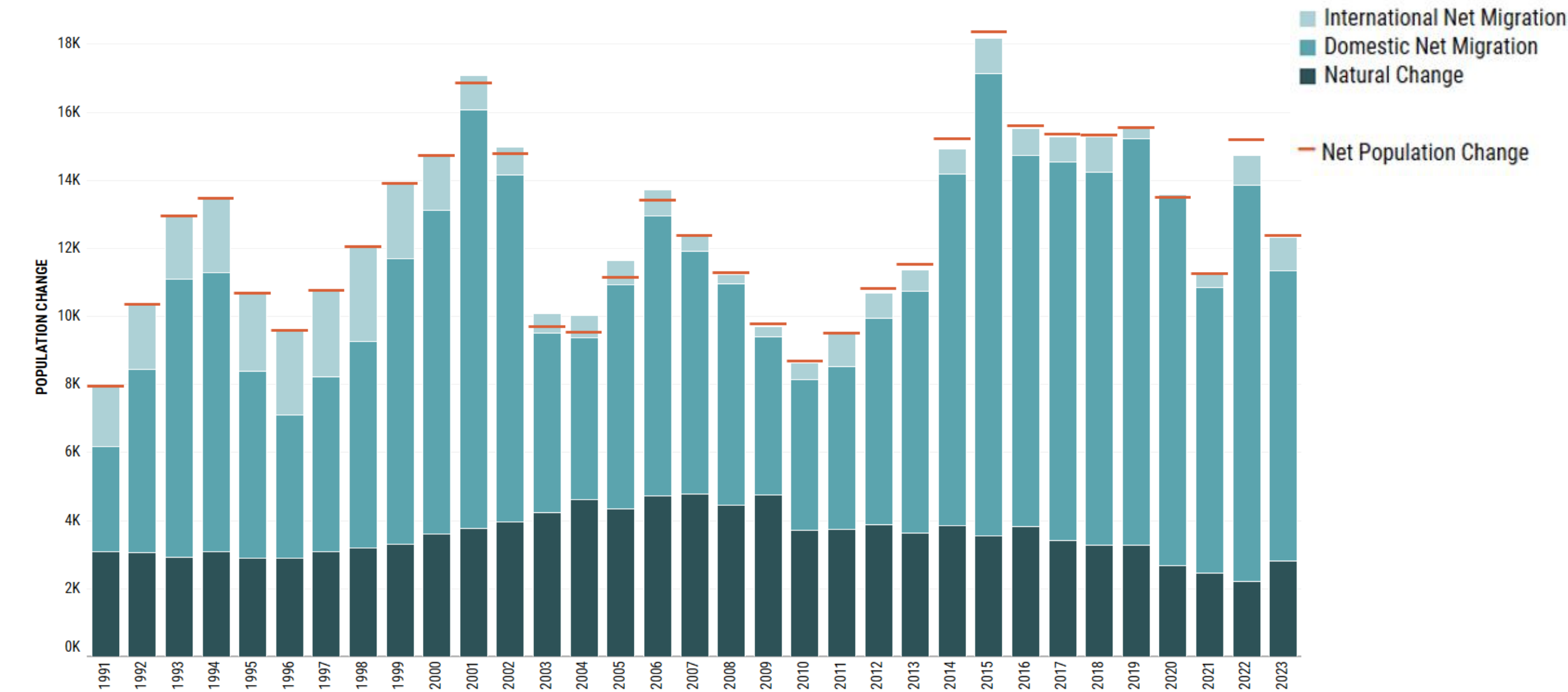


Sources: US Bureau of Labor Statistics (BLS); Lightcast 2025.1—QCEW Employees, Non-QCEW Employees, and Self-Employed; TIP Strategies, Inc.

Notes: Fort Collins, CO, is approximated by ZIP codes 80521, 80522, 80523, 80524, 80525, 80526, 80527, 80528, 80553.

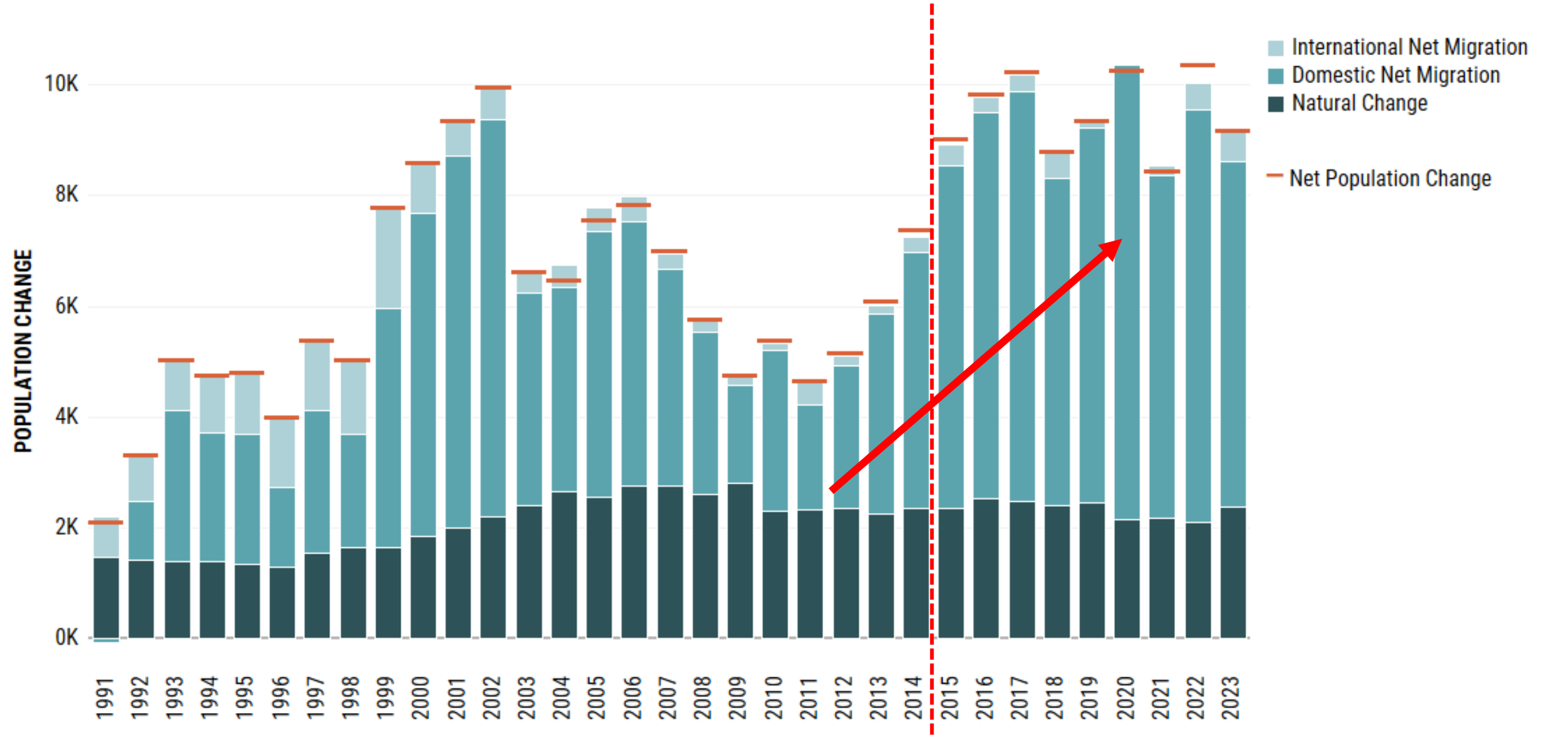
NORTHERN COLORADO POPULATION

Drivers of Change in Larimer and Weld Counties (international, domestic, and natural growth)



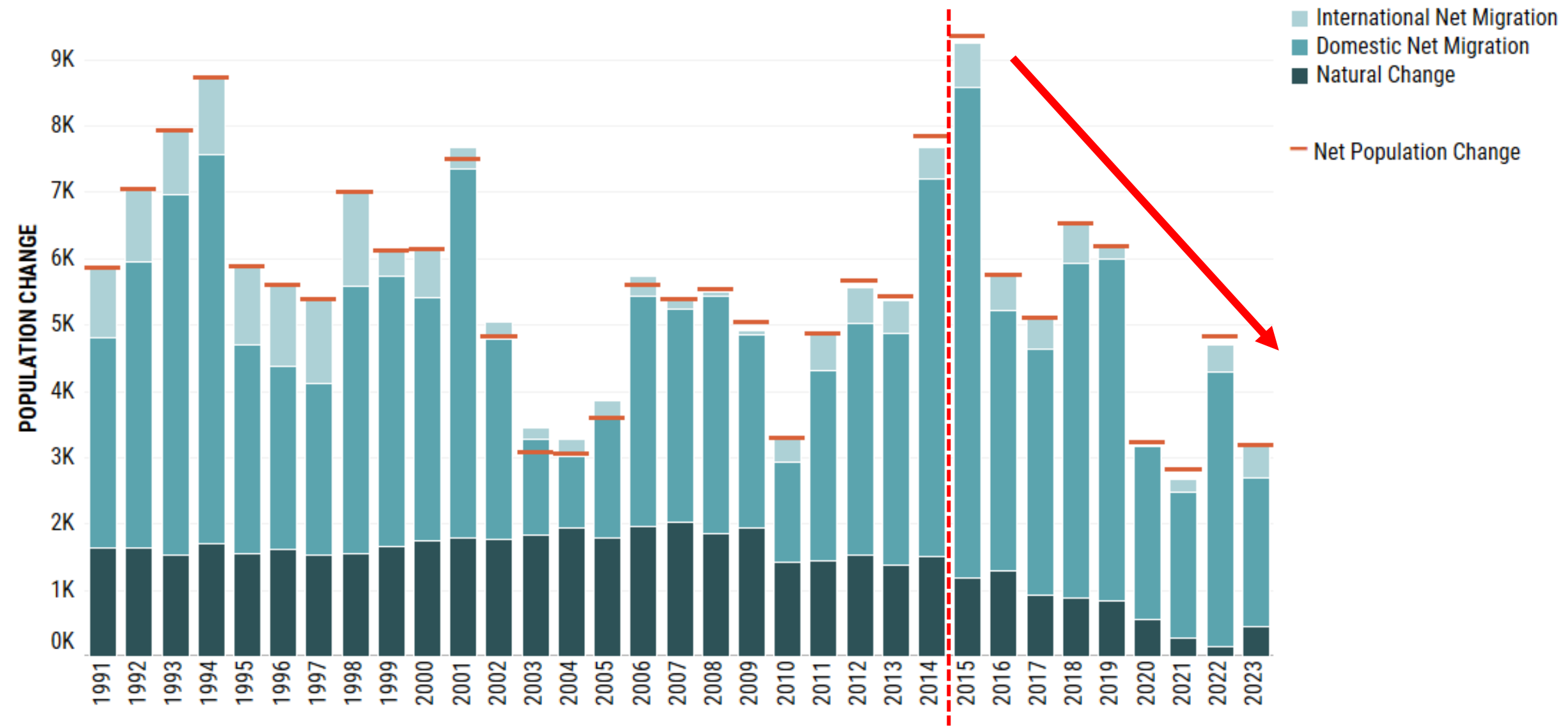
Sources: US Census Bureau, Population Estimates Program; Moody's Analytics; TIP Strategies, Inc.
Notes: Natural Change is the difference between annual births and deaths. Total population change includes a residual (a change in population that cannot be attributed to any specific demographic component). Residual change is not shown in the chart but is included in the net population change shown by the red bars. 2010 and 2020 components are estimated based on a 12-month projection of the 2nd quarter (the period between the Census and the mid-year estimate) that is not seasonally adjusted.

WELD POPULATION GROWTH RATE INCREASING



Sources: US Census Bureau, Population Estimates Program; Moody's Analytics; TIP Strategies, Inc.
Notes: Natural Change is the difference between annual births and deaths. Total population change includes a residual (a change in population that cannot be attributed to any specific demographic component). Residual change is not shown in the chart but is included in the net population change shown by the red bars. 2010 and 2020 components are estimated based on a 12-month projection of the 2nd quarter (the period between the Census and the mid-year estimate) that is not seasonally adjusted.

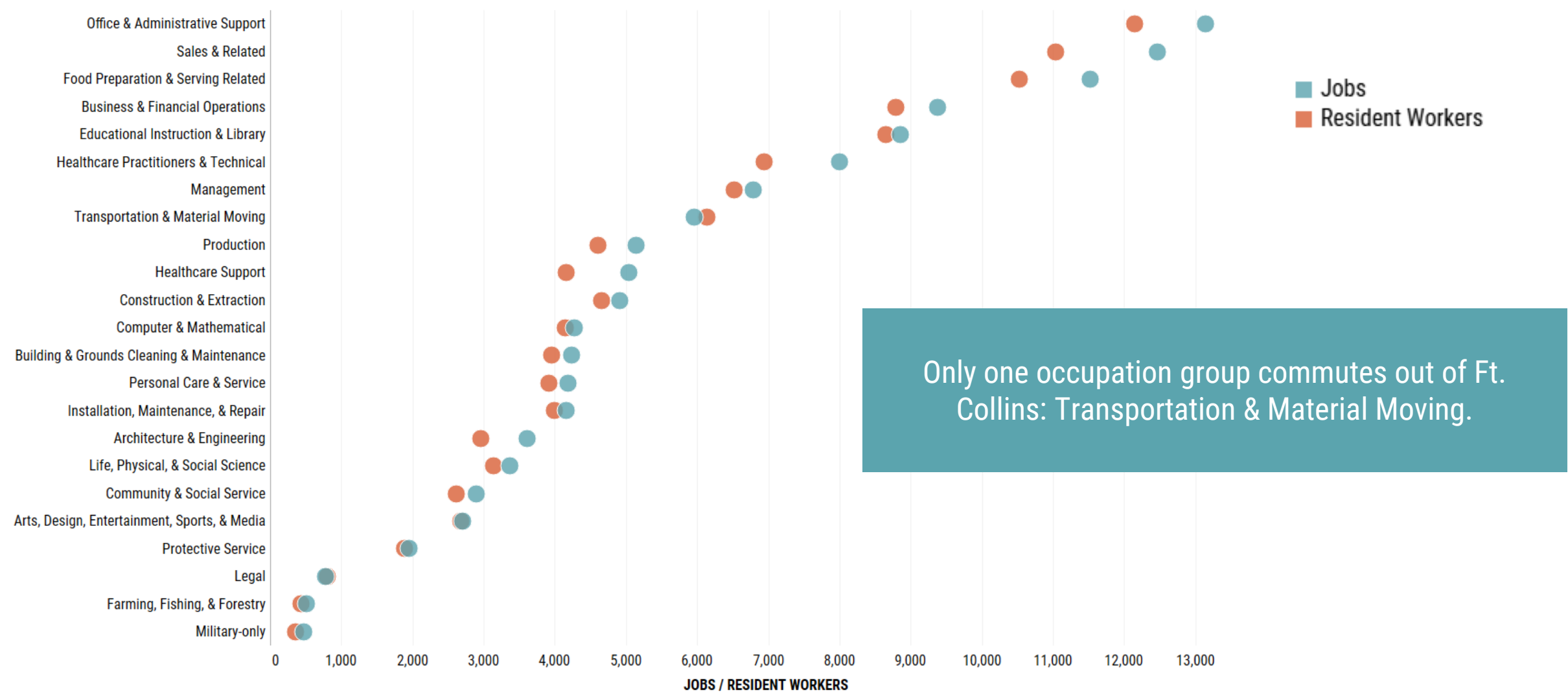
LARIMER POPULATION GROWTH RATE DECREASING



Sources: US Census Bureau, Population Estimates Program; Moody's Analytics; TIP Strategies, Inc.
Notes: Natural Change is the difference between annual births and deaths. Total population change includes a residual (a change in population that cannot be attributed to any specific demographic component). Residual change is not shown in the chart but is included in the net population change shown by the red bars. 2010 and 2020 components are estimated based on a 12-month projection of the 2nd quarter (the period between the Census and the mid-year estimate) that is not seasonally adjusted.

FT. COLLINS COMMUTING PATTERNS | OCCUPATION EMPLOYMENT

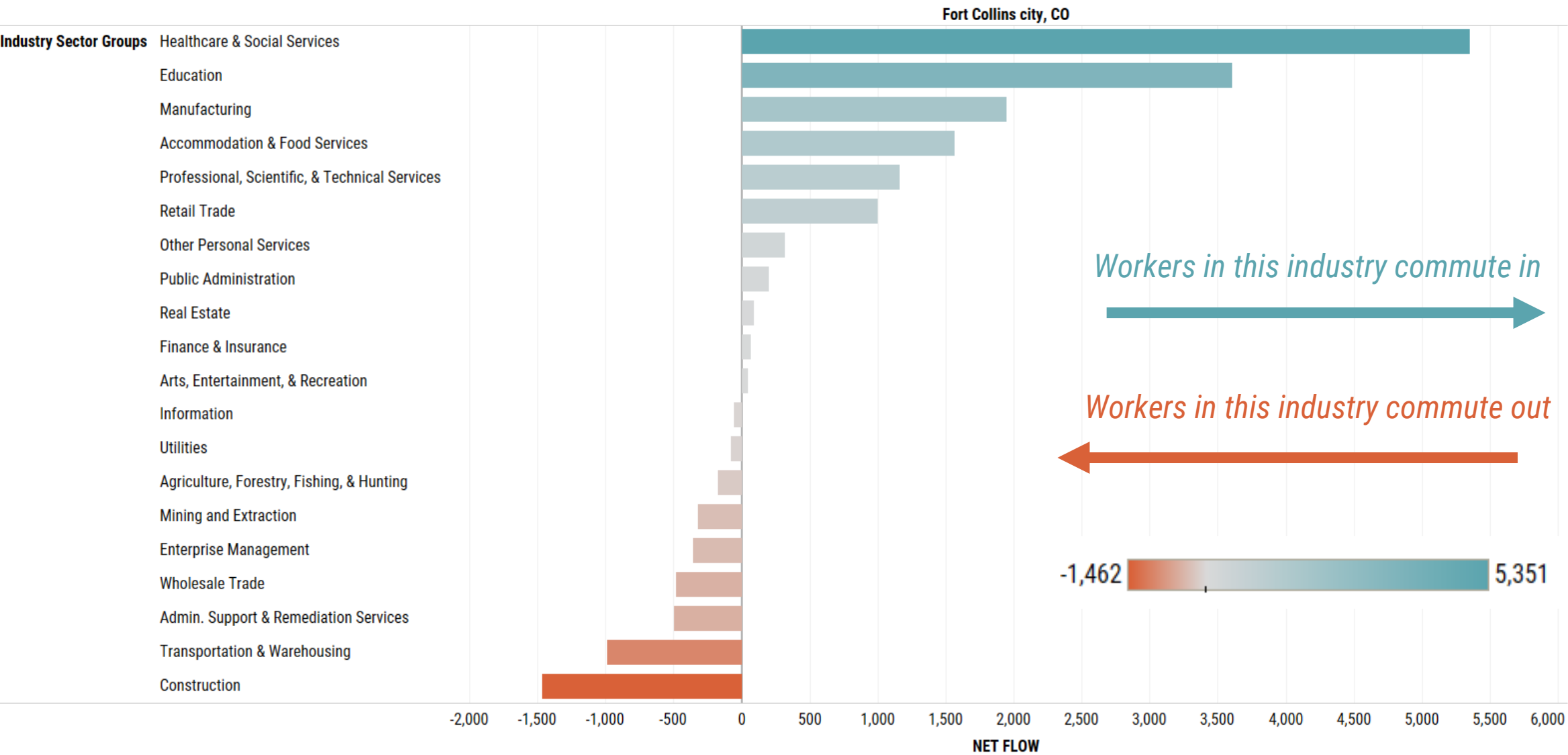
Occupation difference between jobs and employed residents in Ft. Collins, 2024



Sources: US Bureau of Labor Statistics (BLS); Lightcast 2025.1—QCEW Employees, Non-QCEW Employees, and Self-Employed; TIP Strategies, Inc.
Note: Fort Collins is approximated by ZIP codes 80521, 80522, 80523, 80524, 80525, 80526, 80527, 80528, 80553

FT. COLLINS COMMUTING PATTERNS | INDUSTRY SECTORS

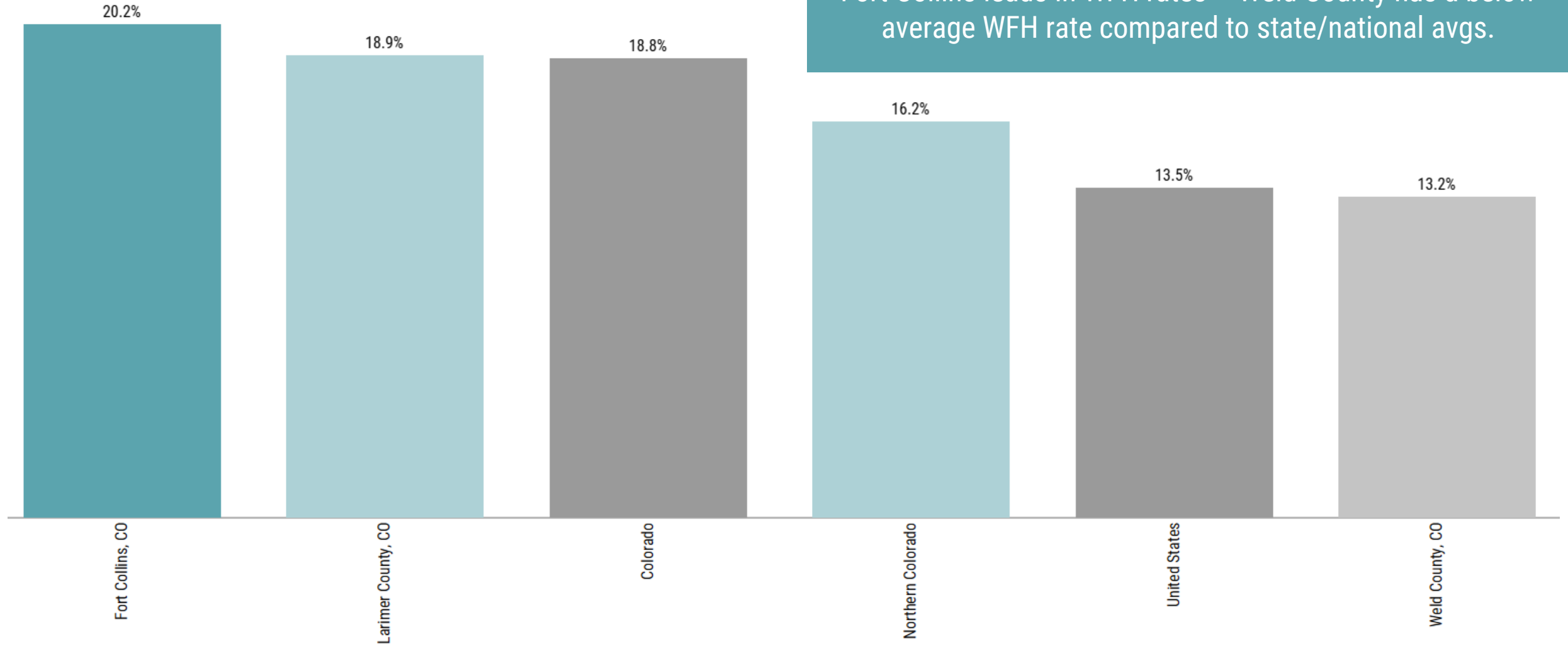
Industry sector net flows of workers through Fort Collins, 2022



Sources: Longitudinal Employer-Household Dynamics (LEHD), Origin-Destination Employment Statistics (LODES); TIP Strategies, Inc.
Notes: All states are included in determining the net flow values in this chart. Net flow may appear slightly different from the values presented in the commuter trends chart.

WORK FROM HOME WORKFORCE

Working population 16 year and over, 2023

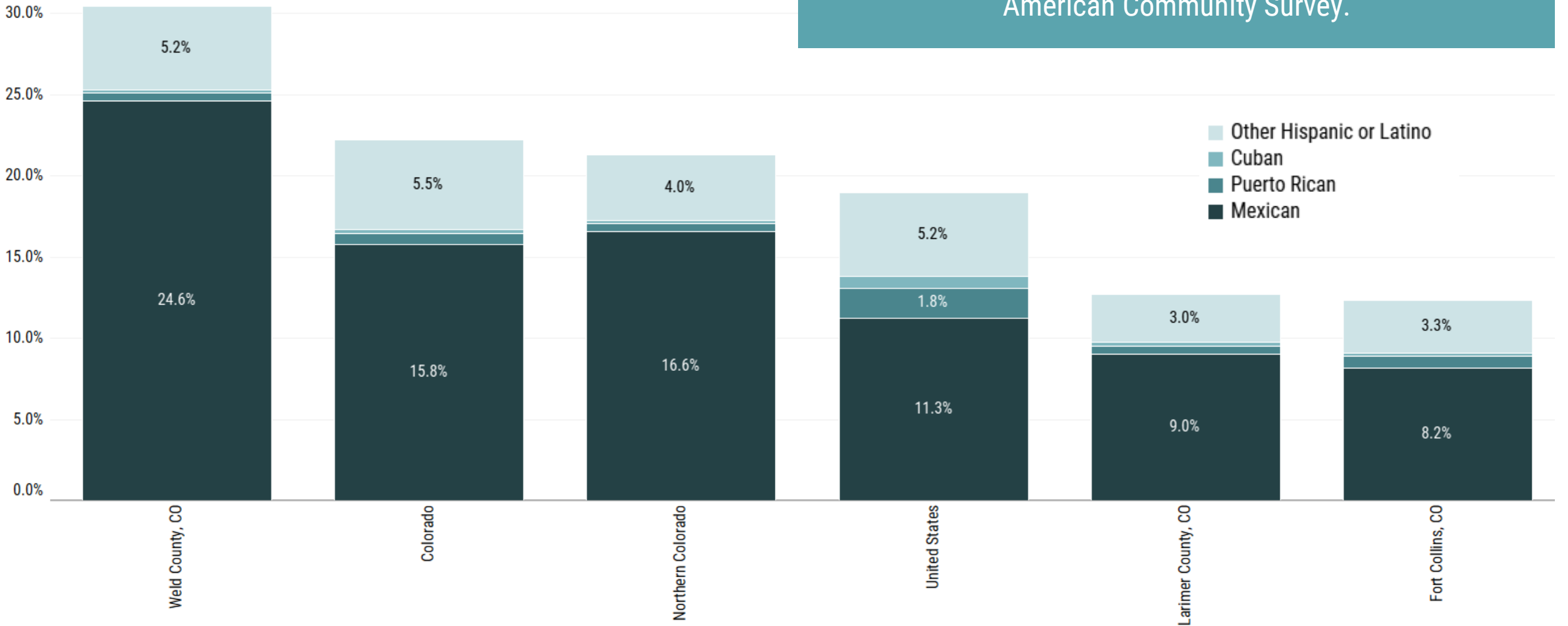


Sources: 2023 American Community Survey (ACS) 5-Year Sample; TIP Strategies, Inc.

Notes: Workers ages 16 and older who worked from home includes remote employees and home-based businesses.

HISPANIC POPULATION | 2023

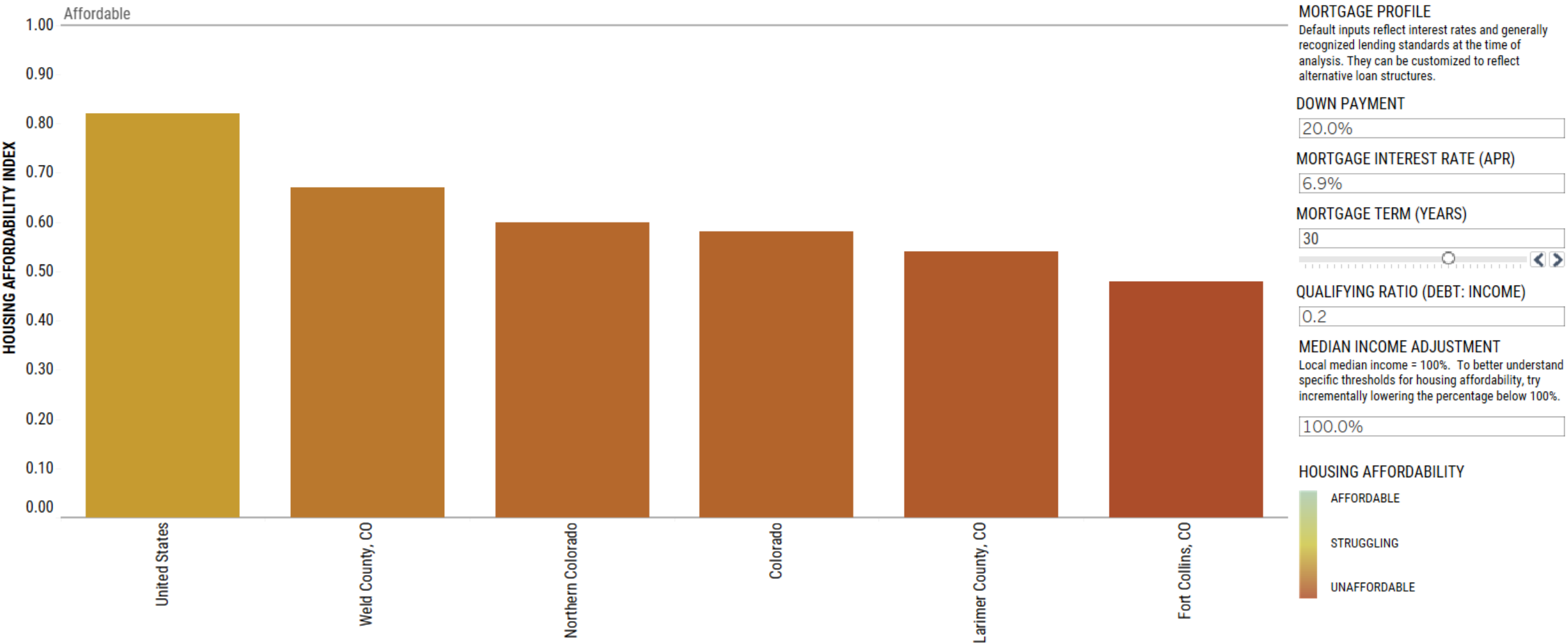
Over 30% of Weld County is estimated to be Hispanic by the American Community Survey.



Sources: 2023 American Community Survey (ACS) 5-Year Sample; TIP Strategies, Inc.

HOUSING AFFORDABILITY INDEX | 2023

Owner occupied housing units

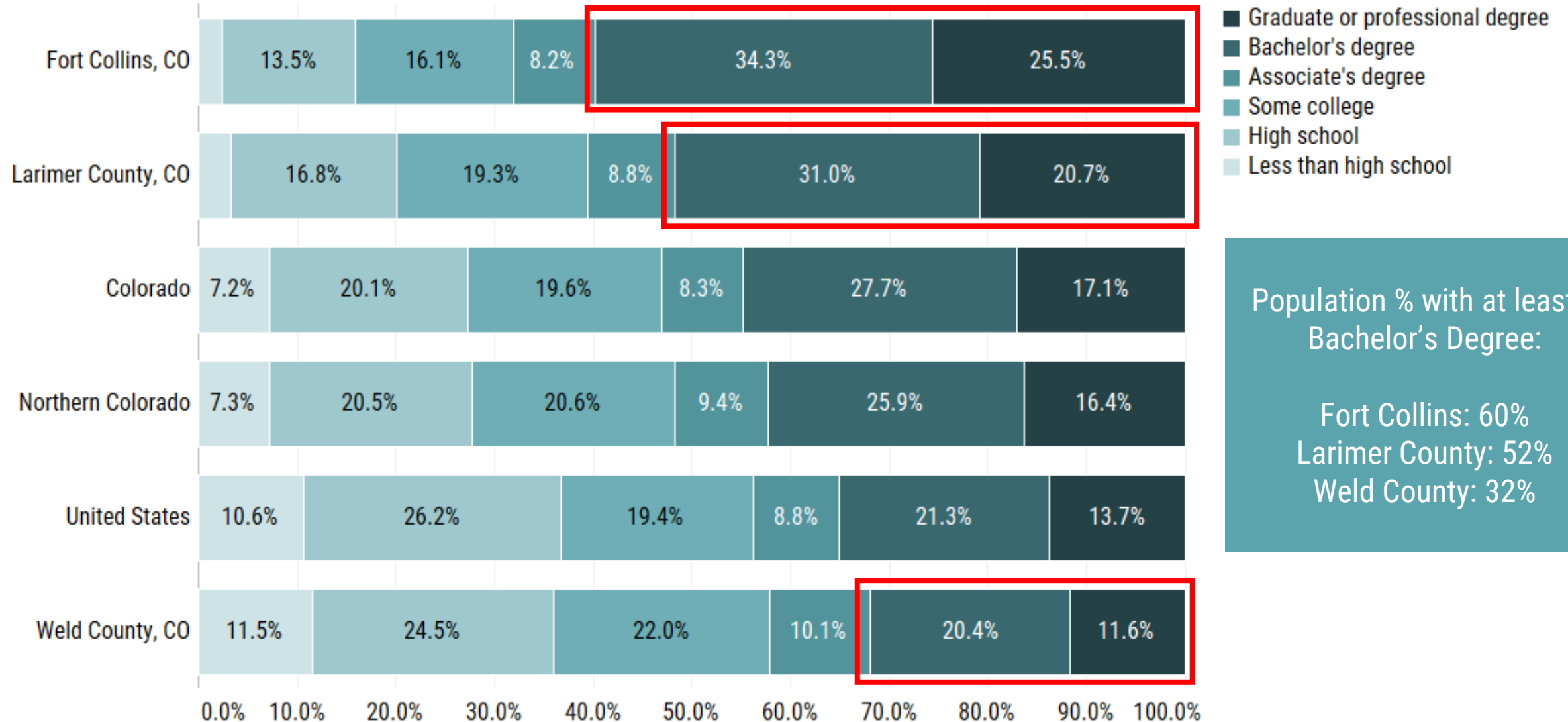


Source: 2023 American Community Survey (ACS) 5-year Sample; Federal Home Loan Mortgage Corporation (Freddie Mac); Texas Real Estate Research Center at Texas A&M University (TRERC); TIP Strategies, Inc

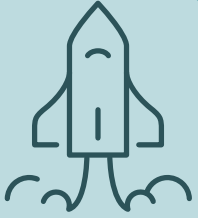
Notes: The Housing Affordability Index was adapted from the Texas A&M University's Real Estate Center by TIP Strategies, Inc. The index compares median household income to a typical mortgage payment on a median-priced home. A value of 1 indicates the median income is exactly enough to purchase a median home. Values <1 (redder bars) indicate unaffordability, and values >1 (greener bars) indicate affordability. Estimated mortgage payments only include the monthly payments on the loan; they do not include insurance or tax payments. Down payment is the percentage of the home value paid before the mortgage. Mortgage interest rate is the APR. Mortgage term is the length of the loan in years. Qualifying ratio (debt: income) is the maximum debt-to-income ratio that still qualifies for a mortgage.

WHERE IS EDUCATED TALENT?

Educational Attainment, Population 25 Years and Over, 2023



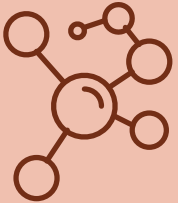
NORTHERN COLORADO REGIONAL TARGET INDUSTRIES



Aerospace



**Fabrication & Production
Technology Manufacturing**



**Bioscience &
Medical Devices**



**Food Processing &
Manufacturing**



Business Services



Information Technology

JOB POSTINGS METHODOLOGY

Why do we use job postings?

- ▶ Better indication of the evolution of jobs.
- ▶ The most recent and closer-to-real-time occupational/skills demand: directly from employers.
- ▶ Job postings can be dissected in many ways far beyond SOC codes, e.g, by technical skills, individual employers, associated titles.

HIGH DEMAND OCCUPATIONS | TARGET INDUSTRIES

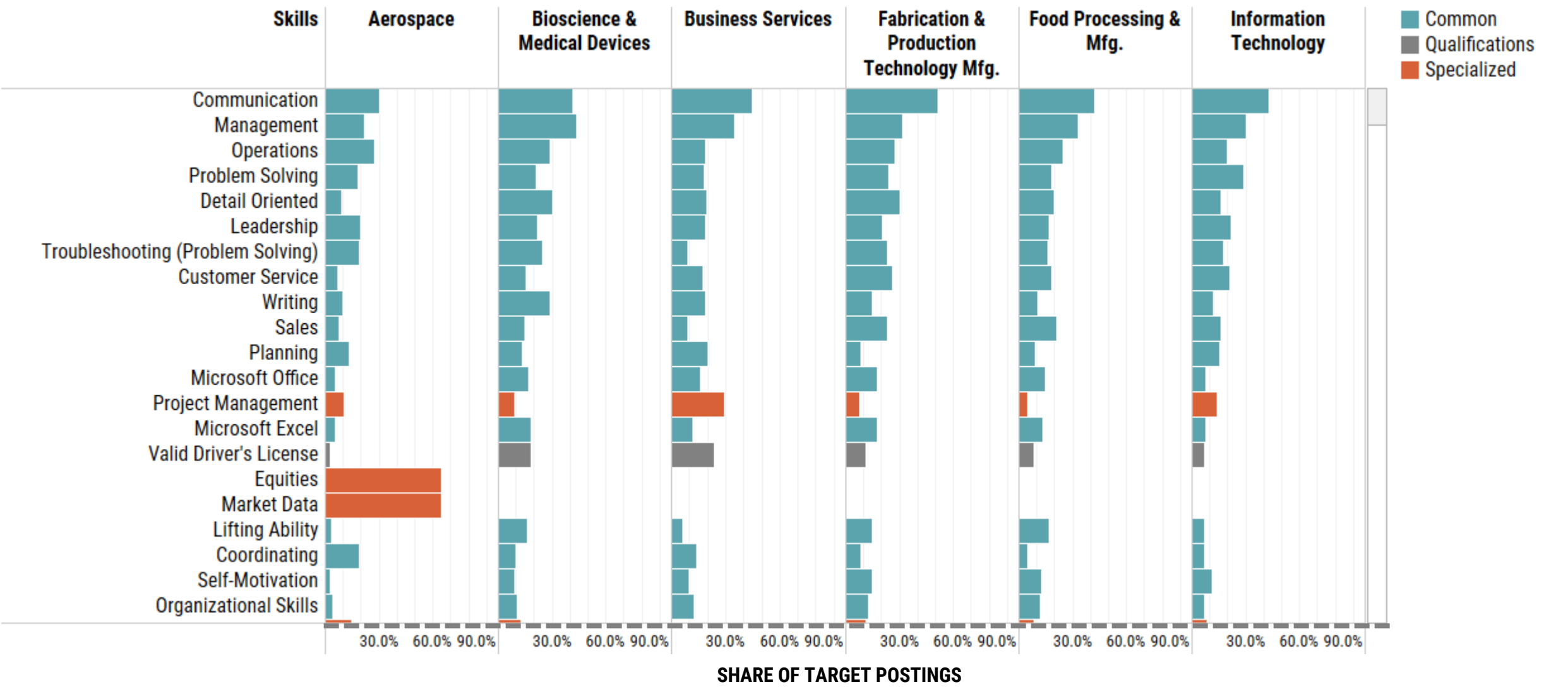
In-Demand Occupations Based on an Analysis of Two Years of Job Postings, March 2023-February 2025

	AEROSPACE	BIOSCIENCE & MEDICAL DEVICES	BUSINESS SERVICES	FABRICATION & PRODUCTION TECHNOLOGY MFG.	FOOD PROCESSING & MFG.	INFORMATION TECHNOLOGY
IN-DEMAND OCCUPATIONS						
Software Developers	●		●			●
Computer, All Other	●		●			●
First-Line Supervisors—Production & Operations	●	●		●	●	
Maintenance & Repair Workers, General	●	●		●	●	
Production Workers, All Other				●	●	
Inspectors, Testers, Sorters, Samplers, & Weighers	●	●			●	
Industrial Engineering Technicians		●		●		
Industrial Engineers	●	●				●
Sales Reps, Non-Technical & Scientific Products		●		●	●	
Laborers & Material Movers, Hand				●	●	
Heavy & Tractor-Trailer Truck Drivers				●	●	
Data Scientists	●					●

Sources: US Bureau of Labor Statistics (BLS); 2025.1—QCEW Employees, Non-QCEW Employees, and Self-Employed; TIP Strategies, Inc.
Notes: Job postings include non-staffing, unique, newly posted job postings for full-time, part-time, and flexible positions, excluding internships, in Northern Colorado between March 2023 & February 2025.

TARGET INDUSTRIES | IN-DEMAND JOB SKILLS

Based on an analysis of two years of job postings, March 2023-February 2025



Sources: US Bureau of Labor Statistics (BLS); Lightcast 2025.1—QCEW Employees, Non-QCEW Employees, and Self-Employed; TIP Strategies, Inc.

Notes: Job postings include non-staffing, unique, newly posted job postings for permanent full-time, part-time, and flexible positions, excluding internships, in the Northern Colorado or the US between March 2023 and February 2025. Skills included in the chart are present in at least one percent of job postings. Data on candidate profiles (resumes) not available for qualifications.

TARGET INDUSTRIES | IN-DEMAND JOB SKILLS

Specialized skills identified in Fabrication & Production Technology Mfg. job postings



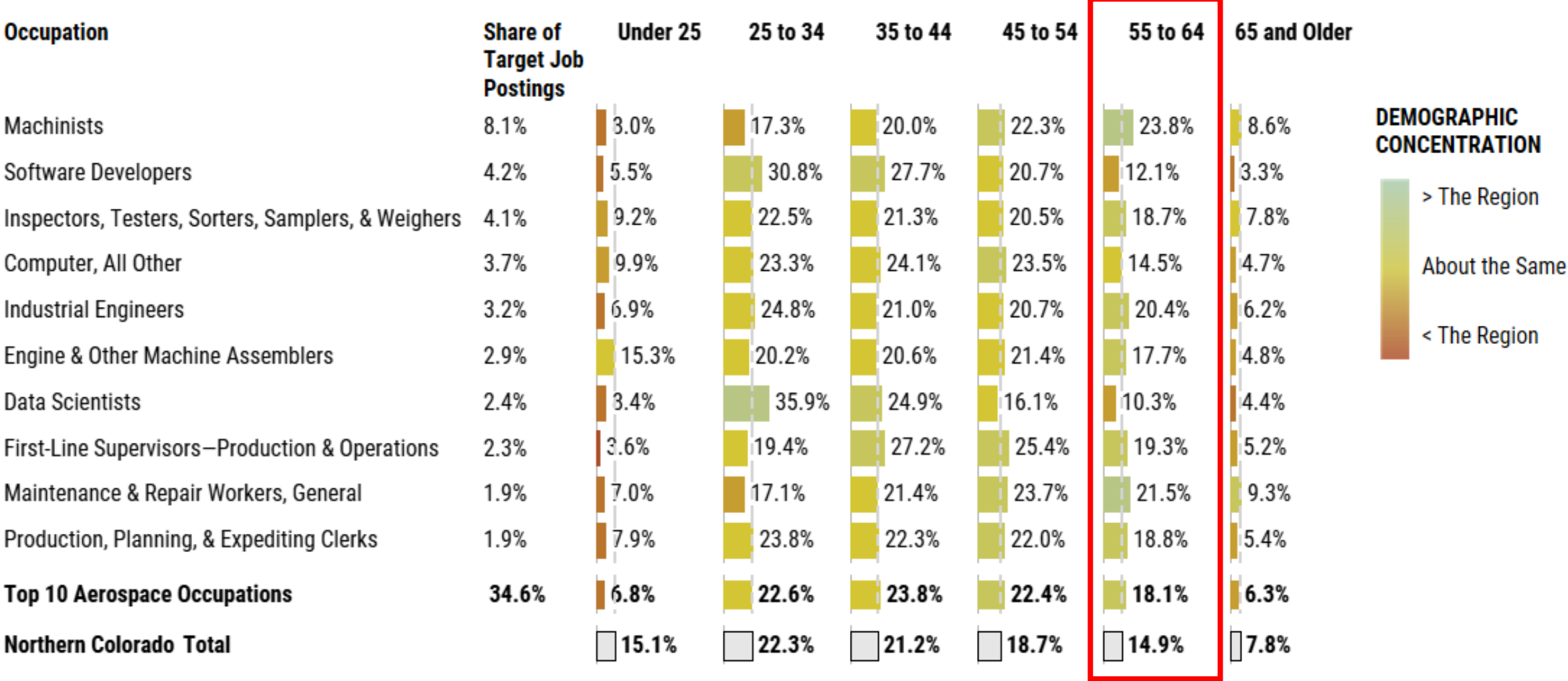
Sources: US Bureau of Labor Statistics (BLS); Lightcast 2025.1—QCEW Employees, Non-QCEW Employees, and Self-Employed; TIP Strategies, Inc.

Notes: Size of skill in word cloud represents how frequently it appeared in Fabrication & Production Technology Mfg. job postings in Northern Colorado between March 2023 and February 2025. Job postings include non-staffing, unique, newly posted job postings for permanent full-time, part-time, and flexible positions, excluding internships. Skills included in the chart are present in at least one percent of sector job postings. Data on candidate profiles (resumes) not available for qualifications.

TARGET INDUSTRIES | DEMOGRAPHICS

Based on an analysis of two years of job postings, March 2023-February 2025

EMPLOYMENT DEMOGRAPHICS OF 10 LEADING AEROSPACE OCCUPATIONS



Sources: US Bureau of Labor Statistics (BLS); Lightcast 2025.1 QCEW Employees, Non-QCEW Employees, and Self-Employed; TIP Strategies, Inc.

Notes: Job postings include non-staffing, unique, newly posted job postings for permanent full-time, part-time, and flexible positions, including internships, March 2023 and February 2025 in Northern Colorado. The color of each bar indicates if the demographic percentage is above (green), about the same (yellow), or below (red) the regional percentage. STEM occupations are identified by the BLS.

CONCLUSION

- ▶ Affordability
- ▶ Diverse job opportunities
- ▶ Competition for talent
- ▶ Wraparound services
- ▶ Role of data





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YOU

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