

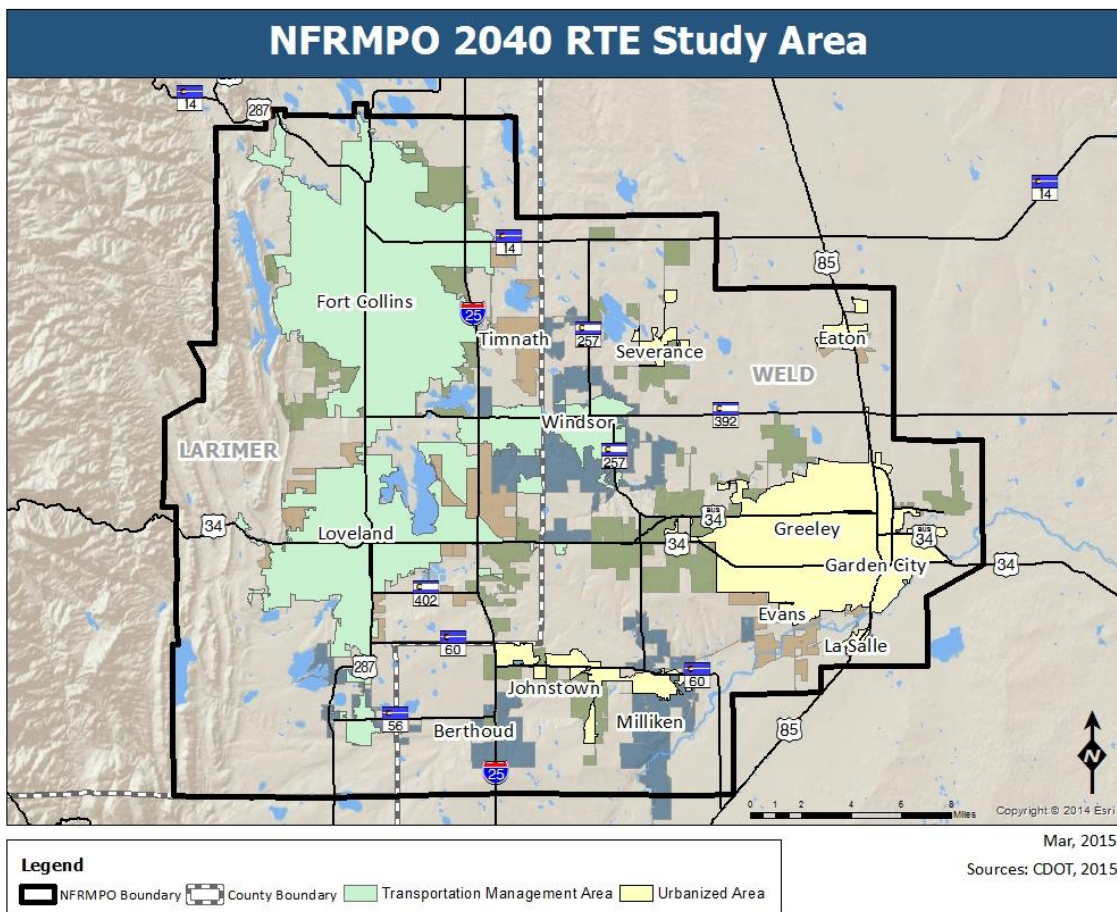
CHAPTER 2: SOCIO-ECONOMIC PROFILE

STUDY AREA

The study area for this 2040 RTE is the NFRMPO region, also designated by the Colorado Department of Transportation (CDOT) as the North Front Range Transportation Planning Region. The NFRMPO boundaries lie within Larimer and Weld counties. The largest communities within the region are Fort Collins, Greeley, and Loveland, but the area includes many smaller municipalities. These MPO communities are within commuting distance to Denver, Boulder, Longmont, and Cheyenne, Wyoming.

The NFRMPO includes the Fort Collins-Loveland Transportation Management Area, a large urbanized area; the Greeley-Evans small-urbanized area; and the small urban and rural areas outside these boundaries. **Figure 2.1** illustrates the study area within the MPO boundary.

Figure 2.1 NFRMPO 2040 RTE Study Area



Source: NFRMPO Staff, 2014

POPULATION

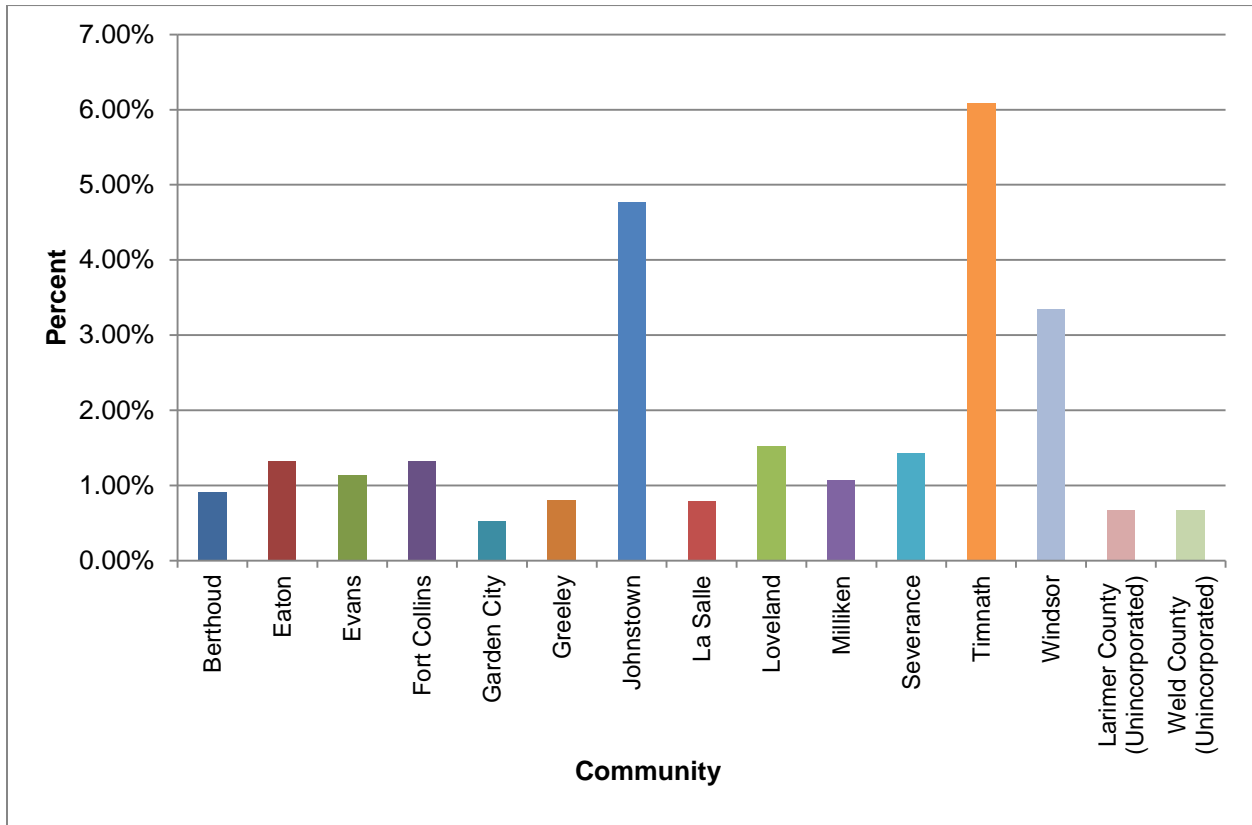
The three largest cities within the MPO boundary, Fort Collins, Greeley, and Loveland, had a 2013 population of 152,205 residents, 96,306 residents, and 71,224 residents, respectively. The communities of Berthoud, Eaton, Evans, Garden City, Johnstown, La Salle, Milliken, Severance, Timnath, and Windsor are also members of the MPO. The population within these communities range from 240 to 21,407 residents, as shown in **Table 2.1**. The balance of the population in the region resides in unincorporated portions of Larimer and Weld counties. According to the Colorado State Demography Office, the population in the North Front Range modeling area was approximately 434,492 in 2010, 8.6 percent of the State of Colorado's total population.

Table 2.1 NFRMPO Region Population Estimates, 2010-2013

Community	2010	2011	2012	2013	Average Annual Growth Rate
Berthoud	5,123	5,156	5,203	5,313	0.91%
Eaton	4,385	4,441	4,525	4,622	1.32%
Evans	18,649	18,931	19,315	19,508	1.13%
Fort Collins	144,416	145,809	149,110	152,205	1.32%
Garden City	235	235	238	240	0.53%
Greeley	93,253	94,189	95,212	96,306	0.81%
Johnstown	9,988	10,411	11,042	12,034	4.77%
La Salle	1,962	1,979	2,003	2,025	0.79%
Loveland	67,046	69,150	70,191	71,224	1.52%
Milliken	5,634	5,695	5,775	5,879	1.07%
Severance	3,204	3,272	3,332	3,392	1.44%
Timnath	626	784	791	793	6.09%
Windsor	18,769	19,238	20,094	21,407	3.34%
Larimer County (Unincorporated)	48,884	49,324	49,768	50,215	0.67%
Weld County (Unincorporated)	12,318	12,429	12,541	12,654	0.68%
TOTAL	434,492	441,043	449,140	457,817	1.32%

Source: Colorado State Demography Office, <http://www.colorado.gov/cs/Satellite/DOLA-Main/CBON/1251593300013>

Figure 2.2 Average Annual Growth Rate, 2010-2013



Source: Colorado State Demography Office, 2015

The average annual growth rate among all the jurisdictions in the region is approximately two percent. When taken individually, the average annual growth rate varies significantly by jurisdiction. As **Figure 2-2** shows, the average annual growth rate is highest in Timnath, where the population increased from 626 in 2010 to 793 in 2013, an average annual rate of 6.09 percent. Other communities with high growth rates include Johnstown and Windsor with 4.77 percent and 3.34 percent respectively.

FORECASTS

In May 2012, Steven Fisher, Ph.D. and Phyllis Resnick, Ph.D. were contracted by the NFRMPO to develop a regional forecast for the North Front Range. The goal of the forecast was to predict population, households, and employment in five-year increments from 2010 to 2040. These socioeconomic data have been added to the NFRMPO land use and travel demand models, which allocates the growth by traffic analysis zone and projects the number of vehicle trips. The output from these models is used for air quality modeling and conformity.

The modeling area in Fisher and Resnick's report **2040 Economic and Demographic Forecast**, is divided into seven regions and do not exactly correspond with the MPO or municipal boundaries, **Figure 2.3**. The sub-region referred to as Surrounding Area or Wellington includes unincorporated portions of Larimer and Weld Counties as well as Ault, Eaton, La Salle, Pierce, and Severance. The I-25 sub-region includes Johnstown, Milliken, Timnath, and Windsor. The Loveland sub-region includes Berthoud and Loveland. The Greeley sub-region includes Evans, Garden City, and Greeley. The Fort Collins sub-region contains only the City of Fort Collins.

By 2040, the region's population is estimated to reach 896,191.¹ The forecasts from the report were adopted by the MPO Planning Council in June 2013 and are the basis for the Land Use and the travel models, providing consistency for both the population and travel forecasts.

Population growth will not be uniform throughout the region. **Table 2.2** provides the population forecasts for the seven sub-regions during the 30-year period between 2010 and 2040, in five-year increments. The Greeley/Evans, I-25 Corridor, and Loveland sub-regions are expected to grow at a faster rate than the Fort Collins and the Surrounding Area sub-regions. **Figure 2.4** shows the average annual growth rate per sub-region between 2010 and 2040. Overall, the average population increase for all sub-regions between 2010 and 2040 is 85 percent.

Figure 2.5 illustrates the relative population levels of each of the five sub-areas used in the model. Fort Collins will continue to decrease its percentage of the overall population from 34.6 percent of the total population in 2010 to 28.5 percent by 2040. Greeley/Evans will increase its share of the total population to 24.7 percent by 2040, only four percent less than Fort Collins. The I-25 sub-region will see the greatest increase, from 8.9 percent of the total population in 2010 to 13.6 percent by 2040.

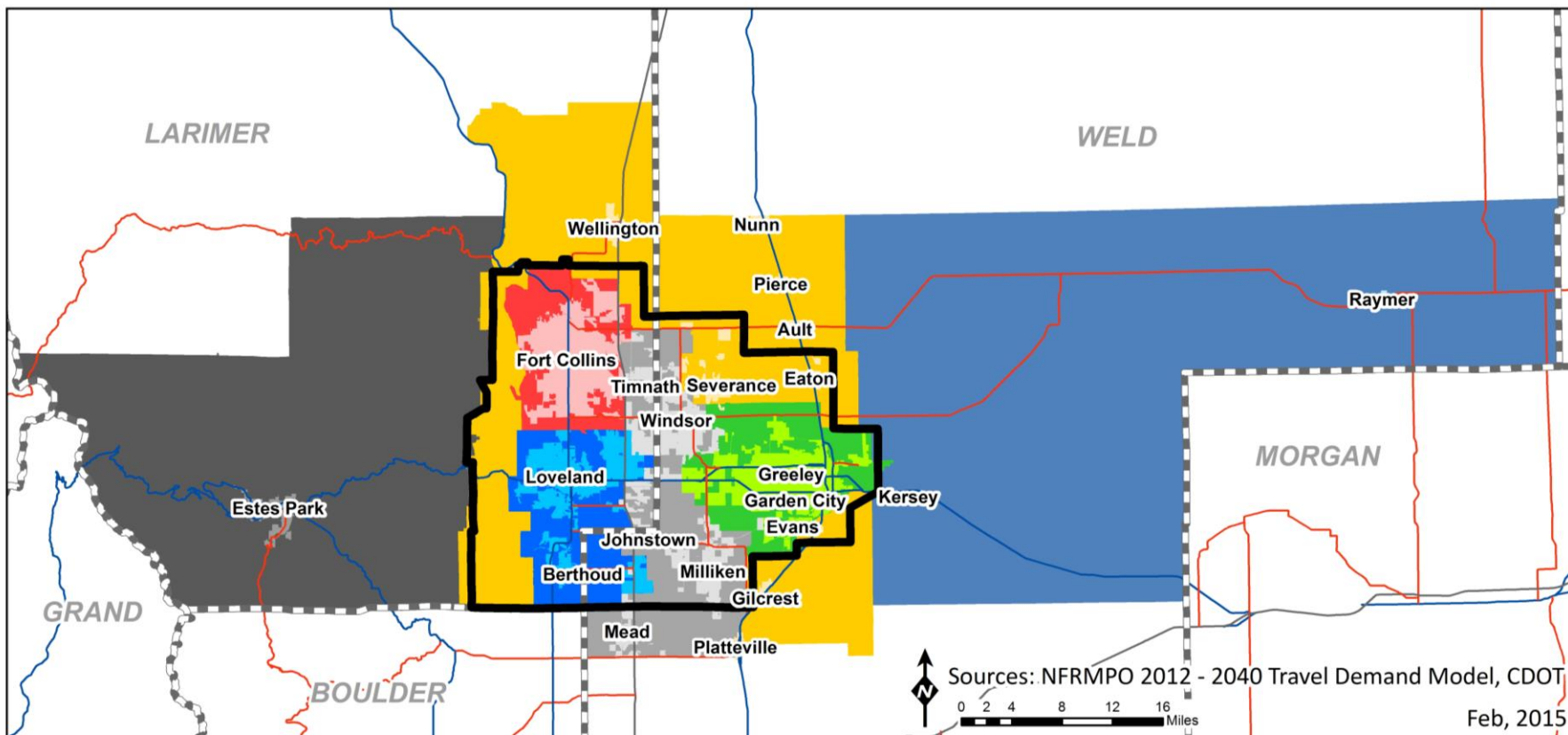
Table 2.2 Population by Sub-Region, 2010-2040

Sub-Region	2010	2015	2020	2025	2030	2035	2040	Average Annual Growth Rate
1 Surrounding Area	50,762	53,518	63,796	68,312	75,874	82,312	89,518	1.91%
2 Greeley/Evans	111,301	122,195	137,435	160,366	178,119	199,694	217,182	2.25%
3 Fort Collins	164,594	178,509	192,277	200,389	222,570	230,290	250,450	1.41%
4 Loveland	77,962	88,605	99,654	112,695	125,172	136,966	148,958	2.18%
5 Estes	20,963	21,467	25,590	28,415	31,561	36,176	39,345	2.12%
6 Weld	7,736	8,389	9,438	10,486	11,648	13,352	14,520	2.12%
7 I-25	42,305	51,213	61,049	83,128	92,328	110,262	119,918	3.53%
Total	475,624	523,989	589,239	663,790	737,273	809,051	879,891	2.07%

Source: 2040 Economic and Demographic Forecast North Front Range Metropolitan Planning Organization (NFRMPO), 2013

¹ "2040 Economic and Demographic Forecast North Front Range Metropolitan Planning Organization (NFRMPO) 2012-2013", is available in its entirety at <http://nfrmpo.org/ResourcesDocuments.aspx>

Figure 2.3 NFR Modeling Area and Sub-Regions



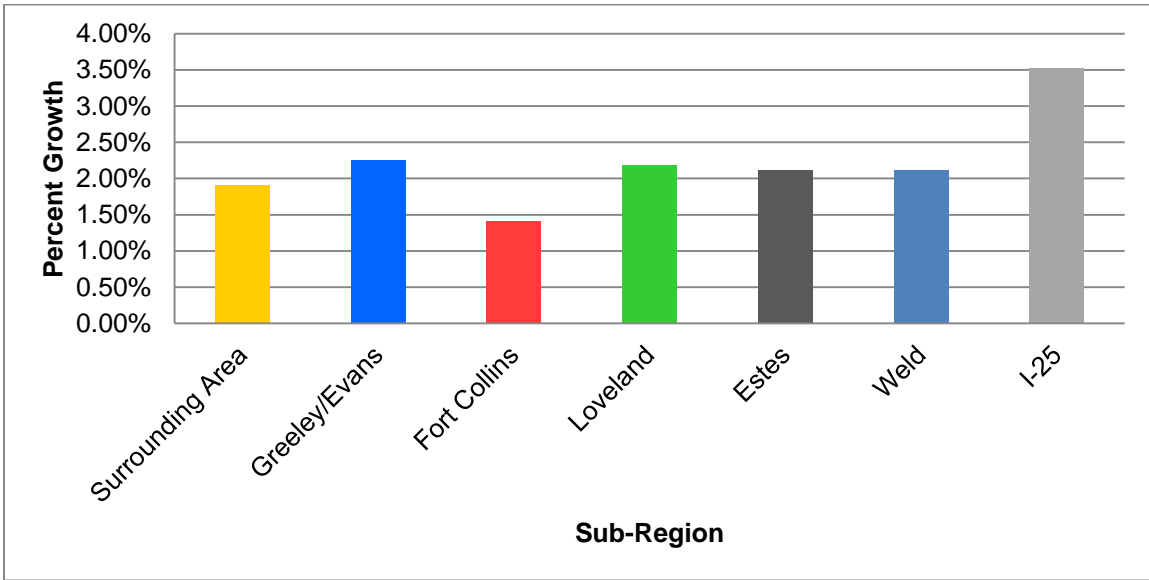
Legend

- NFRMPO Boundary
- County Boundary
- Subregion 1 - Surrounding Area
- Subregion 2 - Greeley/Evans
- Subregion 3 - Fort Collins
- Subregion 4 - Loveland/Berthoud
- Subregion 5 - Extended Larimer County
- Subregion 6 - Extended Weld County
- Subregion 7 - Central I-25



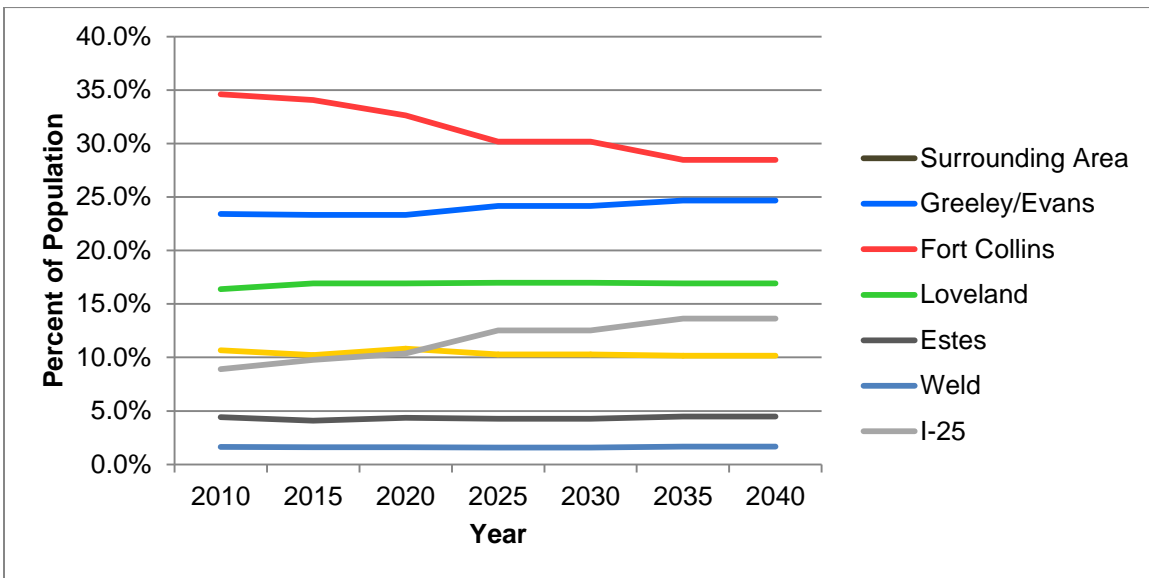
Source: NFRMPO 2012-2040 Travel Demand Model, 2015

Figure 2.4 Average Annual Growth Rate by Sub-Region, 2010-2040



Source: 2040 Economic and Demographic Forecast North Front Range Metropolitan Planning Organization (NFRMPO), 2013

Figure 2.5 Percentage of Total Population by Sub-Region, 2010-2040



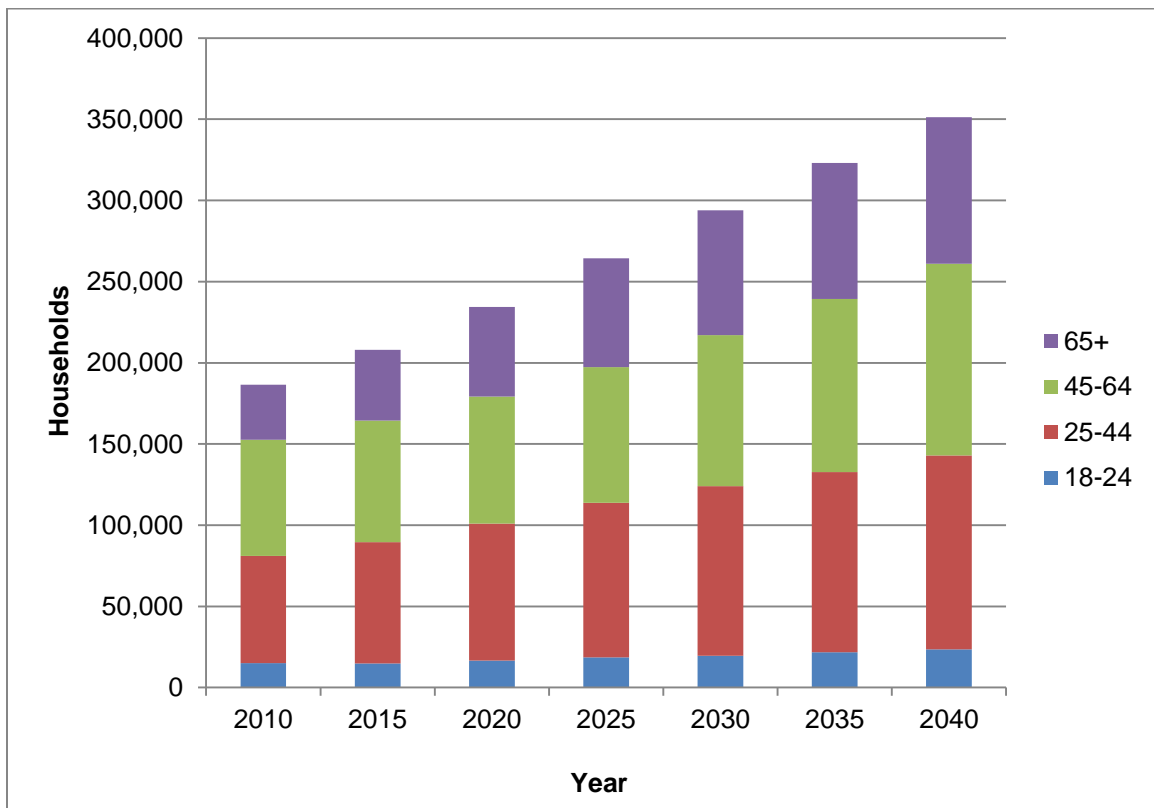
Source: 2040 Economic and Demographic Forecast North Front Range Metropolitan Planning Organization (NFRMPO), 2013

The population in the North Front Range region will grow in all age cohorts (**Figure 2.6**); however, households headed by the oldest cohort, those aged 65 years and older, will grow the fastest. This cohort will grow from 18 percent of the population in 2010 to 26

percent of the population by 2040. This equates to a growth rate of over 166 percent, from 33,000 in 2010 to over 90,000 in 2040. Additionally, this cohort will increase on average more than three percent every year through 2040. This is over twice the growth rate for the group with the smallest gains, the 18-24 cohort. The average annual growth rate for all segments is shown in **Figure 2.7**.

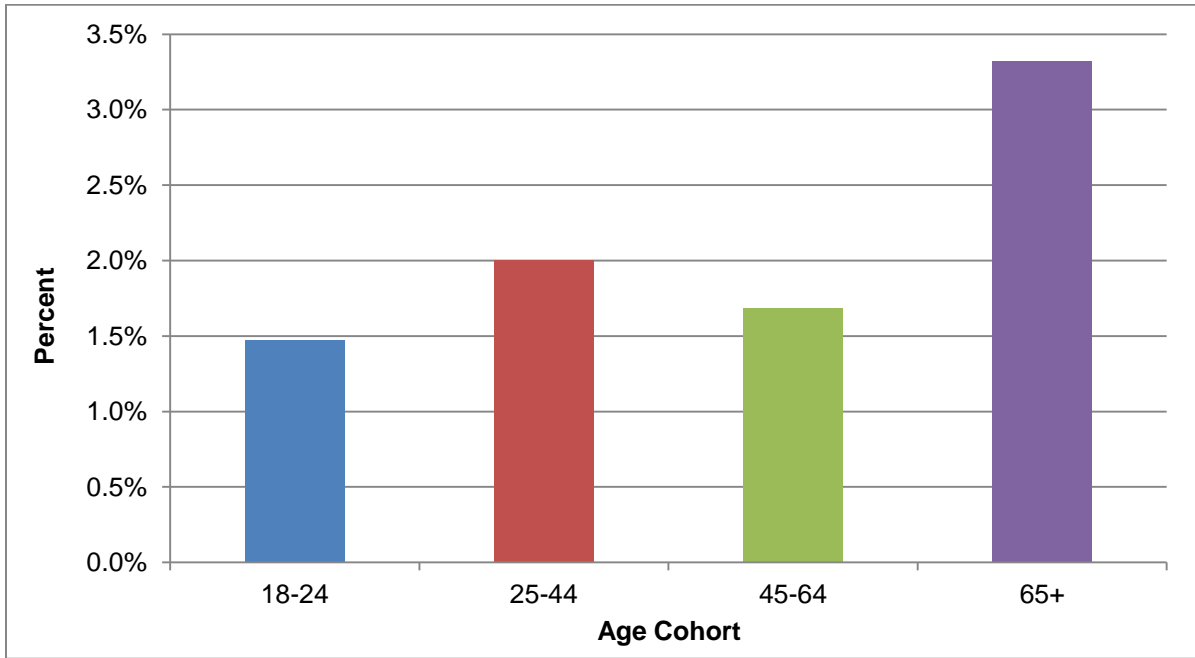
Knowing the age cohort growth projection rates is important for transportation as it allows time to plan to better meet the needs of the age groups needing additional or specialized transit services. Based on this projection, providing more transportation options for the aging population should be a priority in the region over the next 25 years.

Figure 2.6: Household Growth by Head of Household Age Group, 2010-2040



Source: *2040 Economic and Demographic Forecast North Front Range Metropolitan Planning Organization (NFRMPO), 2013*

Figure 2.7: Average Annual Household Growth Rate by Age Group, 2010-2040



Source: 2040 Economic and Demographic Forecast North Front Range Metropolitan Planning Organization (NFRMPO), 2013

EMPLOYMENT AND TRAVEL PATTERNS

The current and projected employment levels were also provided by the **2040 Economic and Demographic Forecast North Front Range Metropolitan Planning Organization (NFRMPO) 2012-2013**.

Total jobs in the North Front Range Forecast Area are estimated at 230,000 in 2010 and projected to grow to 415,000 by 2040. The growth varies by area with the most rapid growth projected to occur in the I-25 sub-region (3.71 percent annual average) and the smallest growth projected to occur in the Fort Collins area (1.24 percent annual average). The Loveland, Greeley/Evans area, and the Surrounding Area are projected to have 2.2 percent, 2.29 percent, and 1.93 percent growth, respectively. **Table 2.3 and Figures 2.8 and 2.9** illustrate projected job growth by sub-region.

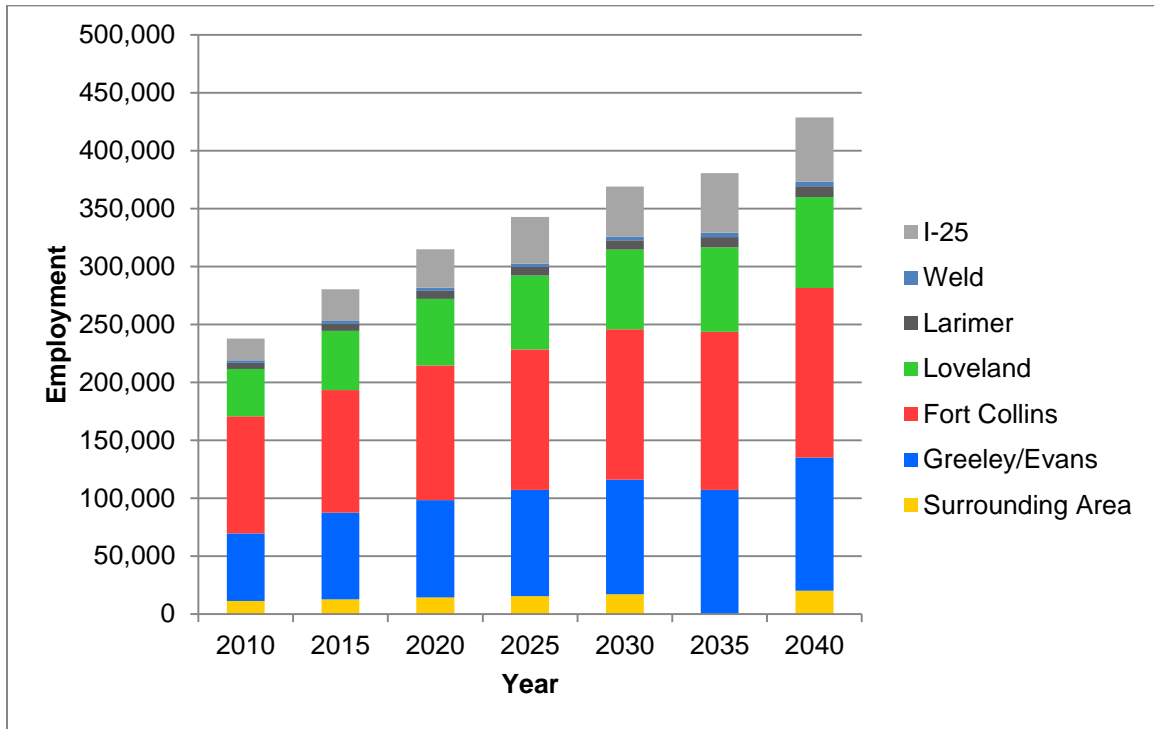
Fort Collins, Greeley/Evans, and Loveland are still projected to contain the majority of the region's employment by 2040.

Table 2.3 Number of Jobs by Sub-Region, 2010-2040

Sub-Region	2010	2015	2020	2025	2030	2035	2040	Average Annual Growth Rate
1 Surrounding Area	11,288	12,608	14,211	15,239	16,937	18,04	20,007	1.93%
2 Greeley/Evans	58,263	74,862	84,111	91,957	98,991	107,112	115,059	2.29%
3 Fort Collins	101,158	105,794	116,102	121,177	129,915	136,565	146,459	1.24%
4 Loveland	40,763	51,130	57,447	63,732	68,607	72,862	78,267	2.20%
5 Larimer	5,397	6,178	6,941	7,419	7,986	8,911	9,572	1.93%
6 Weld	2,173	2,487	2,795	2,989	3,218	3,593	3,860	1.93%
7 I-25	18,574	27,147	33,219	40,305	43,388	51,550	55,374	3.71%
Total	237,615	280,207	314,827	342,818	369,042	398,996	428,599	1.99%

Source: 2040 Economic and Demographic Forecast North Front Range Metropolitan Planning Organization (NFRMPO), 2013

Figure 2.8 Employment Growth by Sub-Region



Source: 2040 Economic and Demographic Forecast North Front Range Metropolitan Planning Organization (NFRMPO), 2013

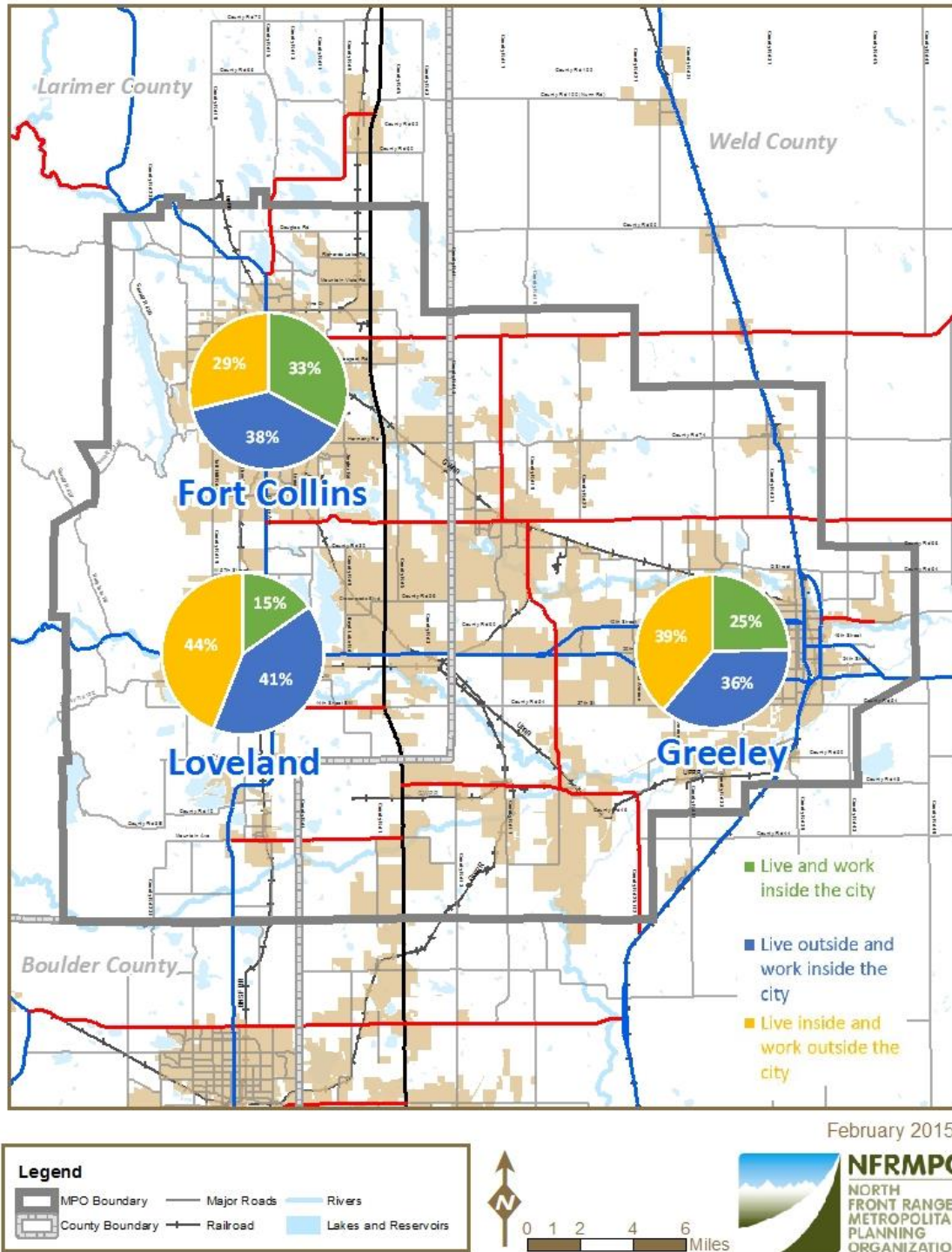
TRAVEL PATTERNS

Travel patterns for commute trips are another important element in this analysis. There is a high level of commuting into and out of the North Front Range modelling region. Data from the Census Department's OnTheMap Version 6 was analyzed for the three largest cities in the North Front Range: Fort Collins, Greeley, and Loveland. OnTheMap is an online mapping and reporting tool depicting where workers are employed and where they live using a variety of data sources, including Longitudinal Employer-Household Dynamics (LEHD) Origin Destination Employment Statistics (LODES) and US Census data.²

The percentage of persons who live and work in the same jurisdiction for Fort Collins, Greeley, and Loveland changed from 2002-2011. Over that 10 year period, Greeley and Loveland saw a steady decrease in the number of residents who live and work in the same community. In 2011, only a quarter of Loveland's residents worked in the City of Loveland, the lowest of the three largest cities. Approximately 40 percent of Greeley's residents lived and worked in Greeley in 2011. Unlike Loveland and Greeley, the number of residents living and working in Fort Collins has stayed relatively steady over same 10 year period, between 50 and 55 percent. The 10 remaining communities in the North Front Range region have very low percentages of residents living and working in the same community, from one to 10 percent. These patterns are shown in **Figure 2.10**.

² OnTheMap website, http://lehd.ces.census.gov/applications/help/onthemap.html#!what_is_onthemap.

Figure 2.10 Regional Travel Patterns



Source: OnTheMap, 2015

In 2011, 74 percent of Loveland's workforce commuted to Loveland from another community; this percentage increased steadily over the last 10 years, starting at 62 percent in 2002. Greeley and Fort Collins have experienced similar growth in the percentage of workers commuting into their jurisdiction, though these percentages are lower than Loveland's.

Loveland also has the highest percentage of its total workforce leaving the community to work elsewhere at 76 percent in 2011. Greeley and Fort Collins are slightly lower at 60 percent and 56 percent, respectively. All three cities have seen an increase in the percentage of their total workforce leaving the community to work elsewhere over the last 10 years.

The **Front Range Travel Counts: NFRMPO Household Survey**, published in 2010, showed trips from rural Larimer County are strongly oriented to Fort Collins and Loveland. The trips from rural Weld County are oriented towards the nearest urban center. Although Greeley captures most of these trips, trips from the western and central portions of the county generally end in Loveland. Trips from the southern part of the county are generally oriented to Broomfield, Denver, or Longmont.

Three important things to note from these forecast and commuter trends:

1. The population in the modeling area will nearly double over the next 30 years. Population and employment growth are occurring fastest within the I-25 sub-region.
2. The population is aging; growth is fastest among those aged 65 and older.
3. Greater numbers of people are commuting to other jurisdictions for work.

These three important trends indicate the area will experience population and socio-economic changes that will likely increase the need for travel in general and transit in particular.

LAND USE

Early development throughout the region was relatively compact, with downtown core areas surrounded by residential development followed by grid-pattern development. As communities expanded, employment and activity centers followed residential development further out from these early urban cores. Today the region contains three core cities, Fort Collins, Greeley, and Loveland, with growth occurring along the I-25 corridor and between the three core cities. Fort Collins, Greeley, and Loveland have all expanded towards I-25. The communities of Berthoud, Johnstown, Timnath, and Windsor are anticipated to absorb much of the growth along this corridor in future years. The area surrounding the intersection of I-25 and US 34 has become a hub for medical and commercial services.

In general, outside the older communities' cores, the region has developed in a largely suburban pattern, with relatively low-density development and employment and activity centers located throughout the region. This land use pattern, where residential and employment centers are widely dispersed is difficult to serve effectively and efficiently with transit.

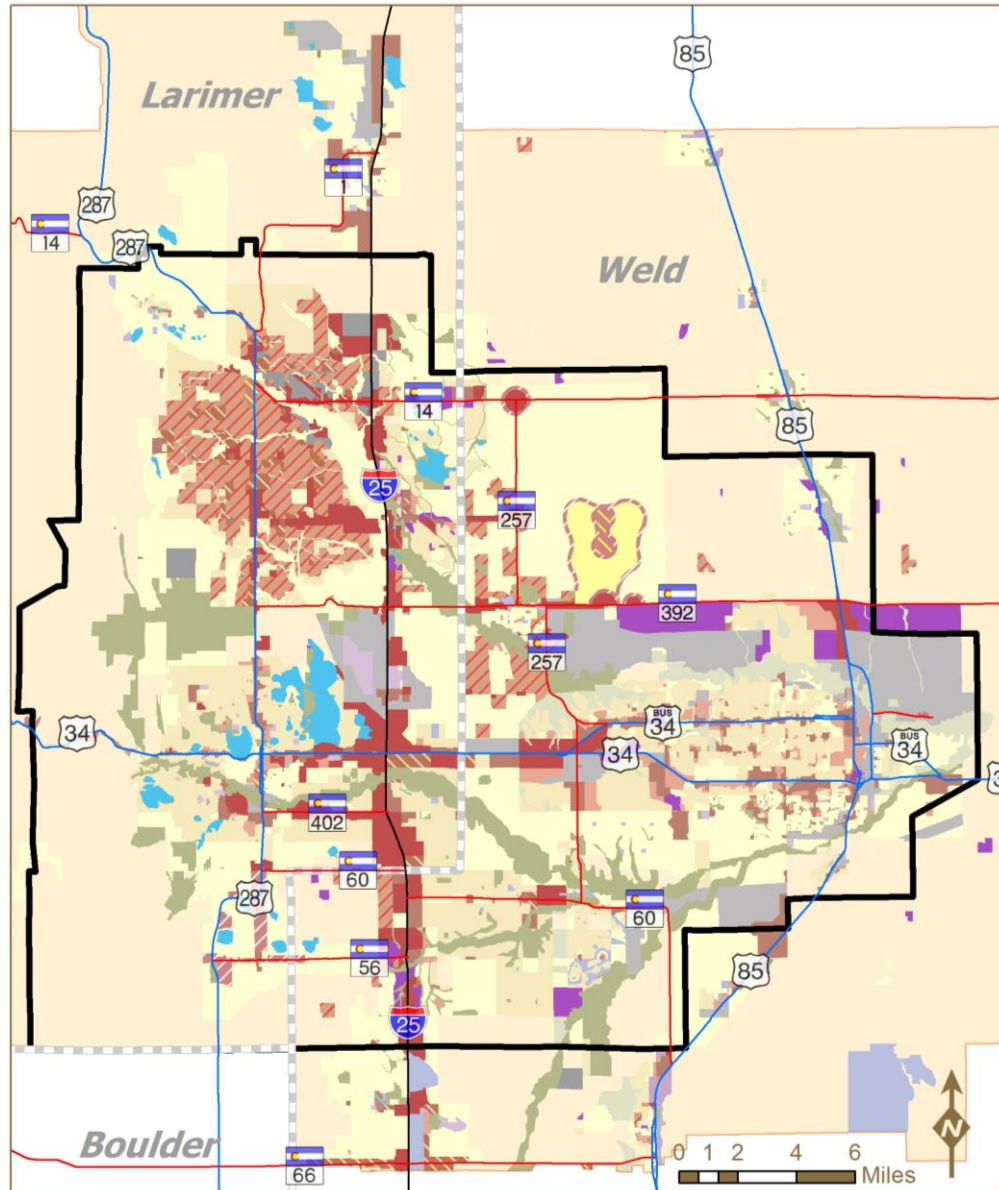
The region's future land use pattern, **Figure 2.11**, shows most of the region's anticipated growth is expected to occur between the existing urban areas.

CHAPTER SUMMARY

Summary points from the analysis of the land use, demographic, and employment data which will figure prominently in the development of the transit network are listed below.

- The entire North Front Range region will see significant population growth, with 84 percent more people in 2040 than in 2010. The I-25 sub-region will have the highest growth rates resulting in a population 183 percent higher in 2040 than in 2010.
 - Fort Collins will remain the largest community, but will have the smallest rate of growth, adding 52 percent more people.
 - Greeley will become larger than Fort Collins is today.
 - Loveland will become larger than Greeley is today.
- The population in the modeling area will nearly double over the next 30 years. Population and employment growth are occurring fastest within the I-25 sub-region. The I-25 sub-region will also have the highest levels of employment growth. The more developed and built out the city, the less population and employment growth is projected to occur.
- The percentage of residents age 65 and over will increase from 18 percent of the population in 2010 to 26 percent of the population by 2040.
- The current population growth rate in the region outpaces the growth rate of jobs, this imbalance will cause even more residents to commute outside the region for employment.

Figure 2.11 North Front Range Future Regional Land Use



Feb, 2015

Sources: Local Land Use Plans, CDOT

Legend

- | | | |
|--------------------------------------|---|---|
| — Interstate | Mixed Use Commercial High | Government Employment |
| — State Highway | Mixed Use Commercial Low | Recreation Sports fields, etc.; Campus K-12 |
| — U.S. Highway | Mixed Use Commercial Medium | Multi-Family Residential (12-35 du/acre) |
| — County Boundary | Mixed Use PUD Residential/Commercial Retail | Single Family Residential-Low (.3 - 2 du/acre) |
| NFRMPO Boundary | Mixed Use Residential High | Single Family Residential-Medium (2-5 du/acre) |
| Commercial-Retail High (>2 emp/acre) | Mixed Use Residential Low | Single Family Residential-High (5-12 du/acre) |
| Commercial-Retail Low (<.2 emp/acre) | Mixed Use Residential Medium | Single Family Residential-Ultra Low (<.3 du/acre) |
| Industrial High (>.2 emp/acre) | Conservation | Agriculture / Residential |
| Industrial Low (<.2 emp/acre) | Open Space, Parks | |
| Office | Water | |

Source: NFRMPO 2012-2040 Land Use Allocation Model, 2015