



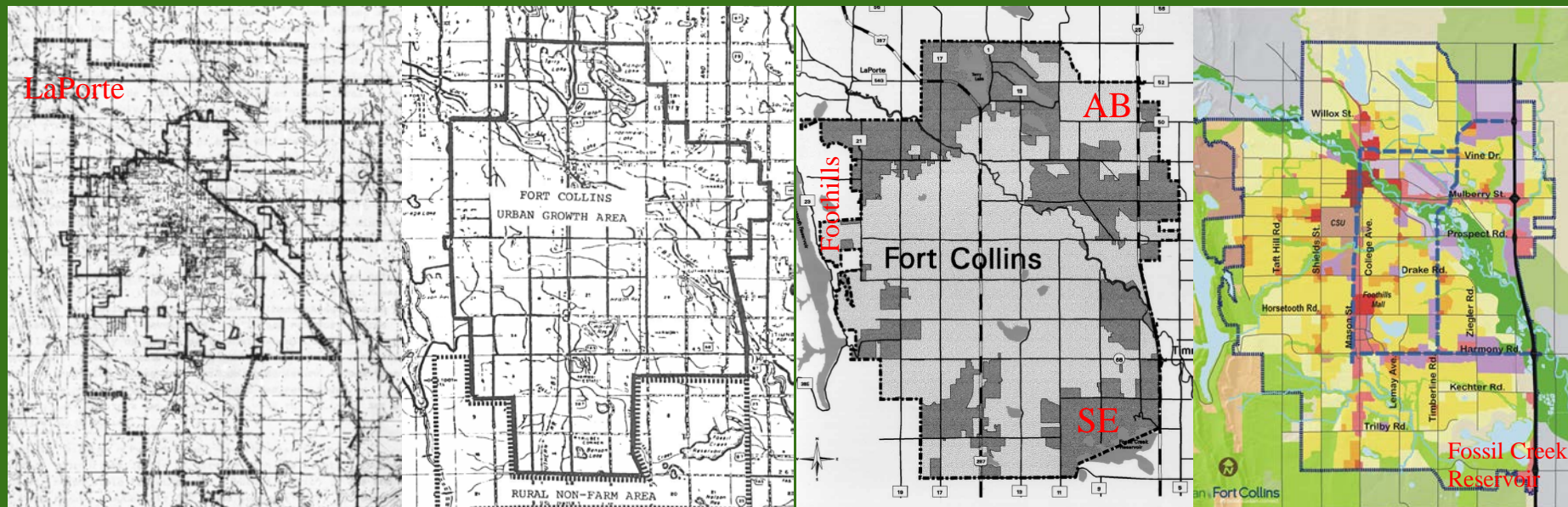
Fort Collins Community Buildout Analysis

2015 Population

- 158,600 - City
- 172,700 - GMA



History of Fort Collins Growth Boundary



1979
Urban Service
Area Study

1980
Urban Growth
Area-1st IGA

2000
Growth Management
Area-Amended IGA

2004
City Plan

Buildout Analysis

What will likely happen if the Fort Collins community grows to the full extent allowed under *City Plan* and the Land Use Code

Greenfield vs. Infill vs. Redevelopment

Infill

creation of new housing or other buildings on scattered vacant sites in a built-up area.

Redevelopment

- ❑ A more intensive use of existing underused buildings and sites (often including building additions and floor plan reconfiguration); or
- ❑ Rehabilitation and adaptive re-use of historic buildings and sites, often for new uses; or
- ❑ Removal of existing building(s), followed by a replacement with different buildings, often larger and containing more intensive uses.

Assumptions

- + Existing GMA (including recent Timnath IGA amendment)
- + Uses and Intensity under *City Plan* and Land Use Code
- + Buildable lands are remaining, vacant or redevelopable parcels in the Growth Management Area
 - Natural areas
 - conservation easements
 - future park/school locations
 - natural resource buffers
 - floodways

Assumptions

- ❑ Approved/In-Process Projects :
 - ❑ under construction
 - ❑ Approved, but not yet built
 - ❑ proposals under review
- ❑ 2012 CSU Master Plan
- ❑ New densities similar to recent averages – historical scenario
- ❑ Maximize the potential density permitted in each zoning district – maximum scenario

GMA Population Buildout

GMA Population Capacity (historic development densities) 236,384

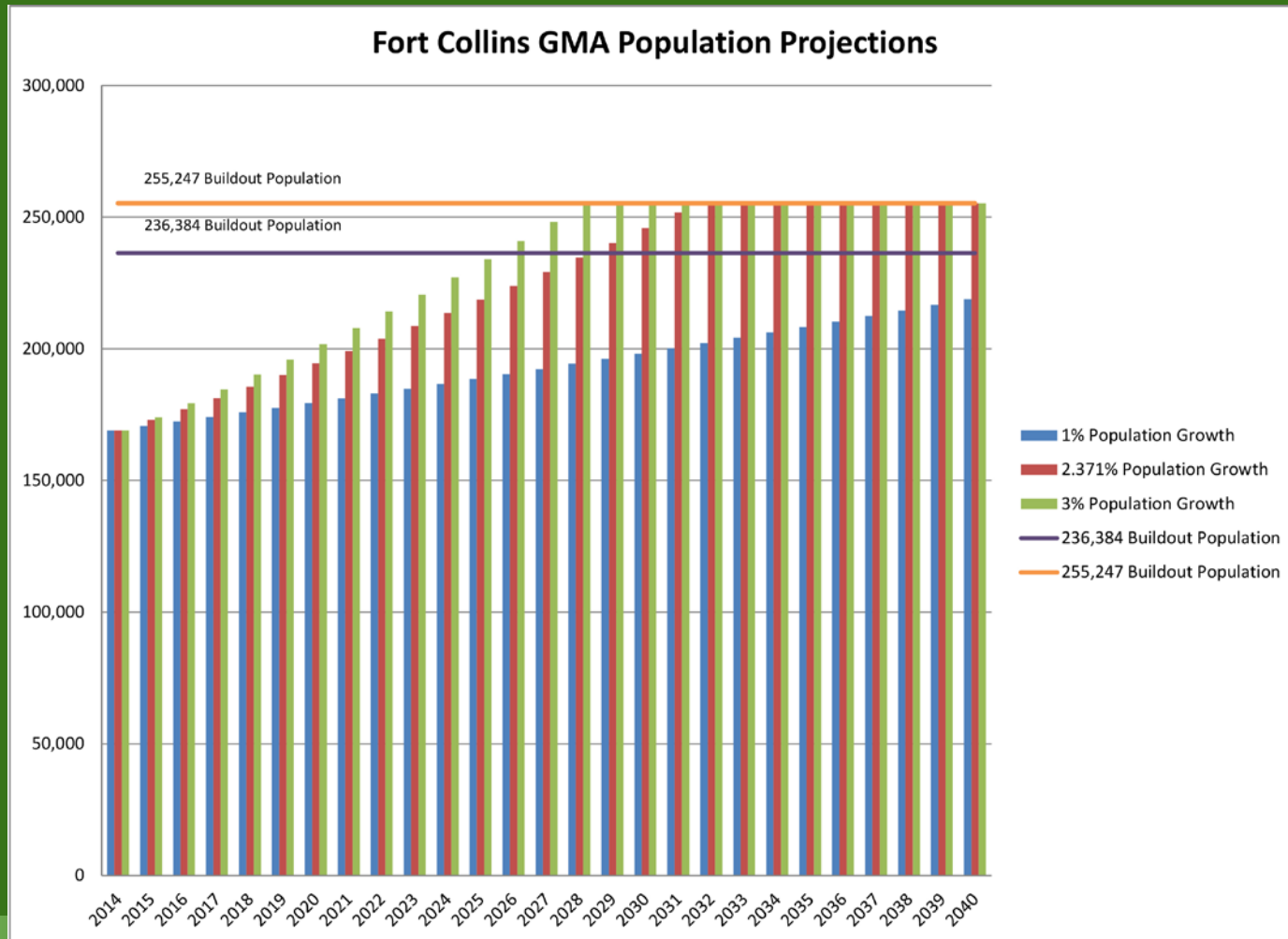
GMA Population Capacity (high development densities) 255,247

GMA Population Buildout Scenarios (Year):

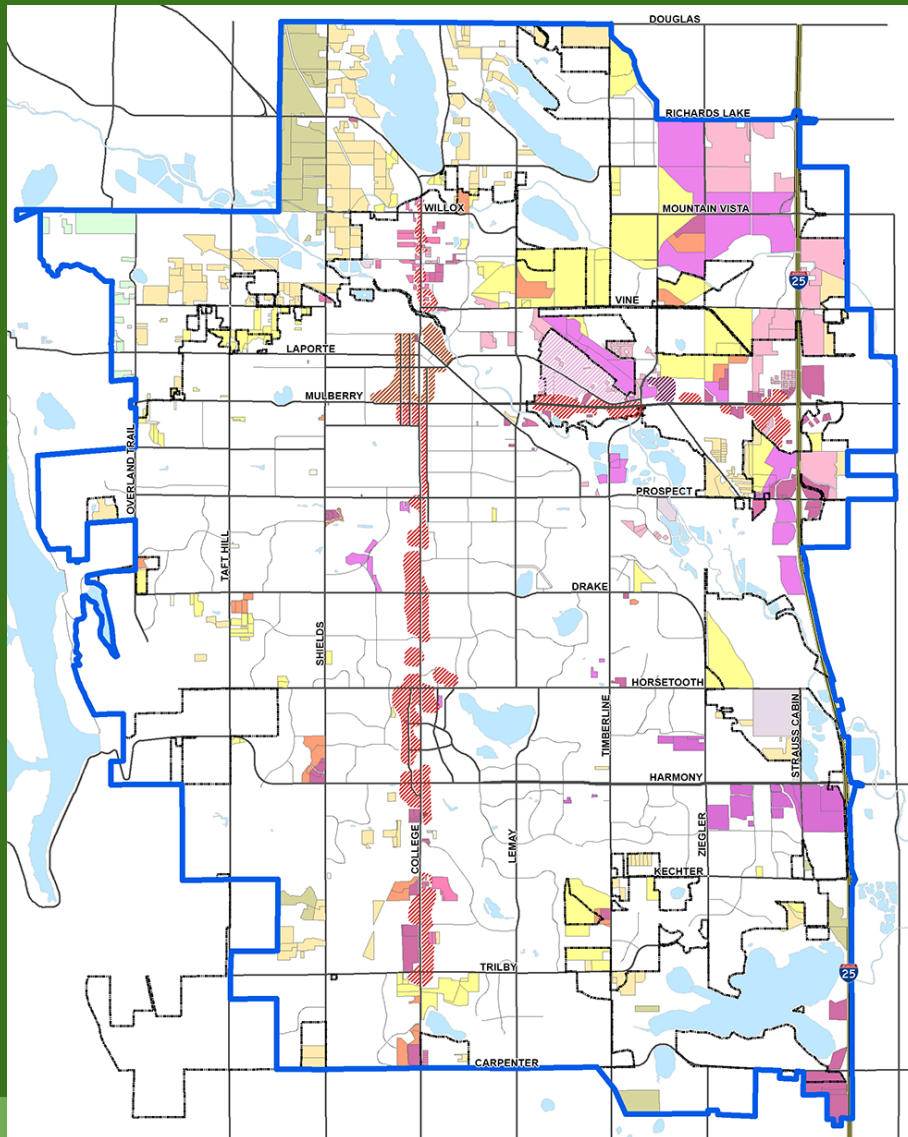
Scenario	1% Avg. Annual Population Growth	2% Avg. Annual Population Growth	3% Avg. Annual Population Growth
Historic Development Density	2040 +	2031	2025
Maximum Development Density	2040+	2036	2028

*Average population growth (City of Fort Collins only; 10-yr. average): 1.85%

Date of Population Buildout



Buildable Lands



□ GMA

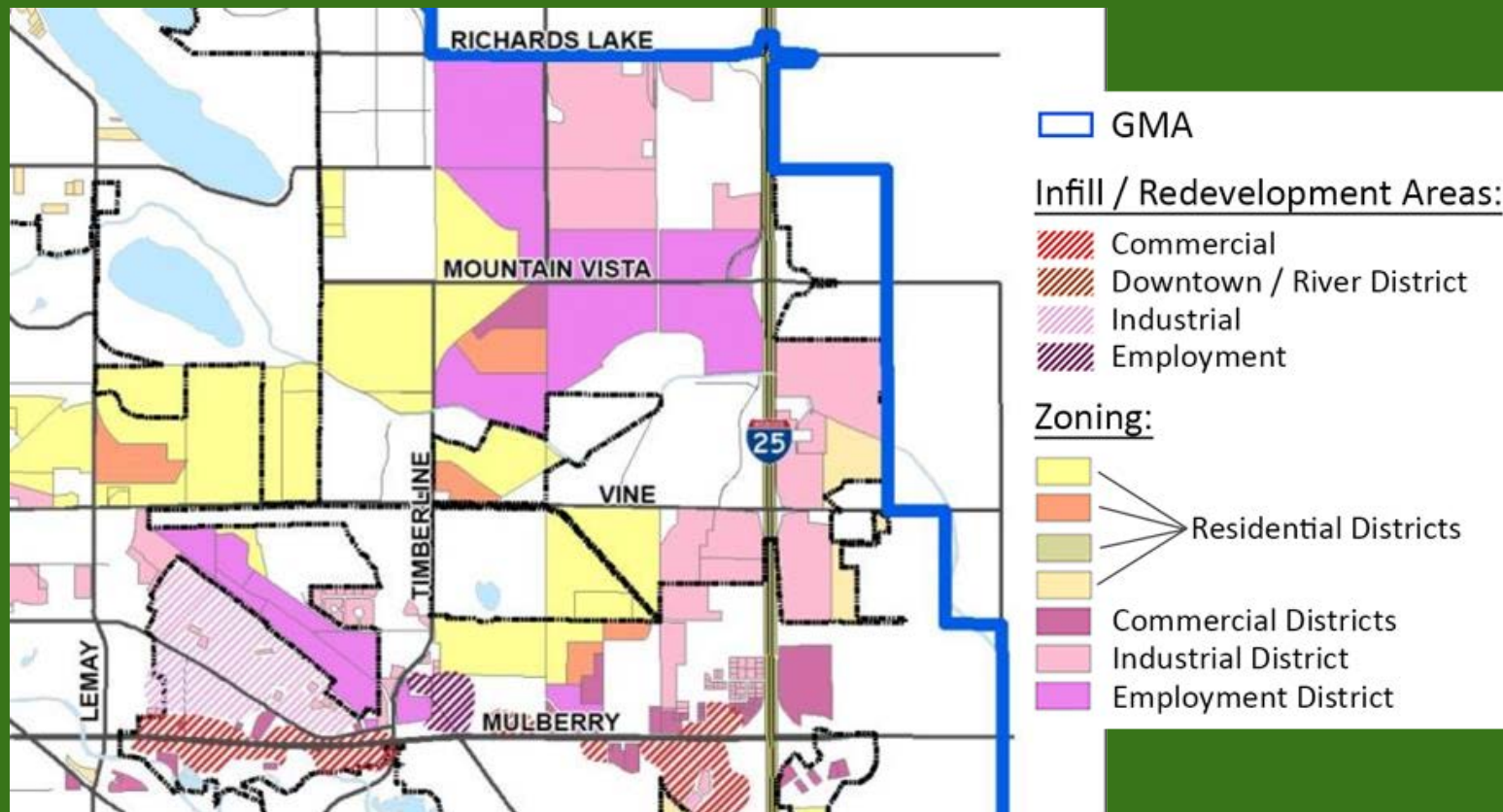
Infill / Redevelopment Areas:

- ▨ Commercial
- ▨ Downtown / River District
- ▨ Industrial
- ▨ Employment

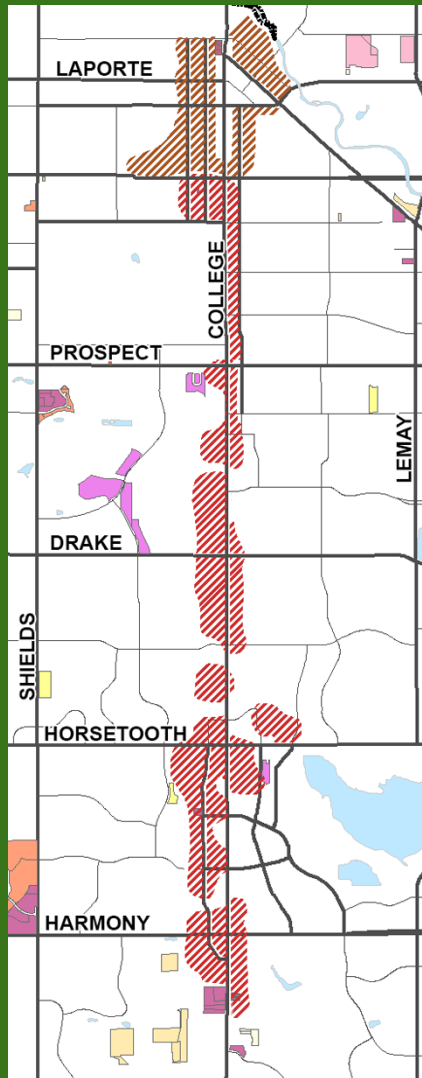
Zoning:

- Residential Districts
- Commercial Districts
- Industrial District
- Employment District

Mulberry/Mt. Vista



Downtown/Midtown



□ GMA

Infill / Redevelopment Areas:

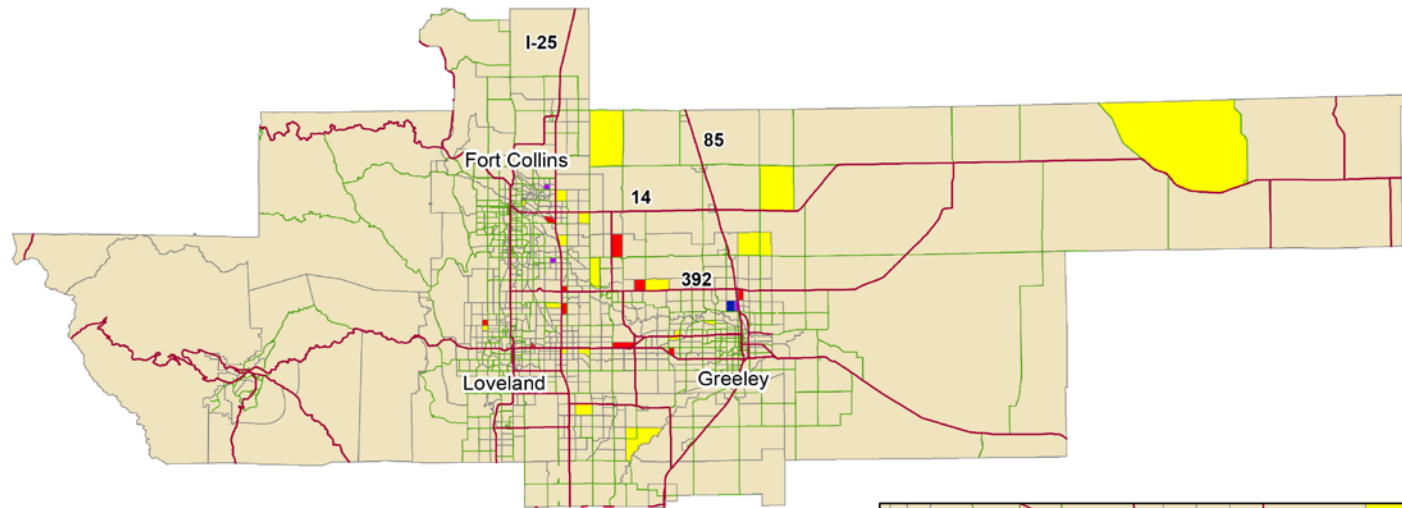
- Commercial
- Downtown / River District
- Industrial
- Employment

Zoning:

- Residential Districts
- Commercial Districts
- Industrial District
- Employment District

2040 Regional Employment Growth

2040 Employment by TAZ

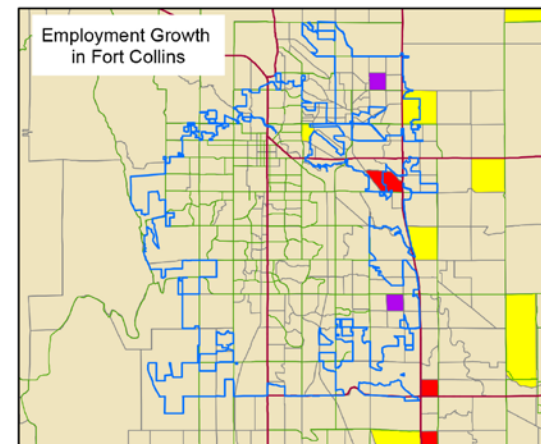


Legend

% Change in Employment 2012-2040

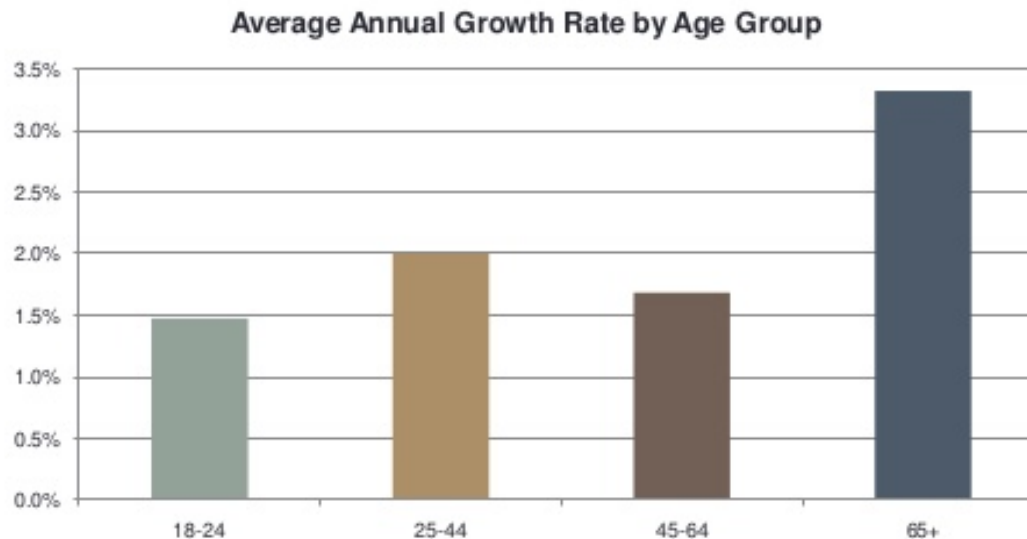
- 0% - 15%
- 16% - 81%
- 82% - 316%
- 317% - 663%
- 664% - 1499%

- Major Roads
- Highways



Regional Demographics - Age

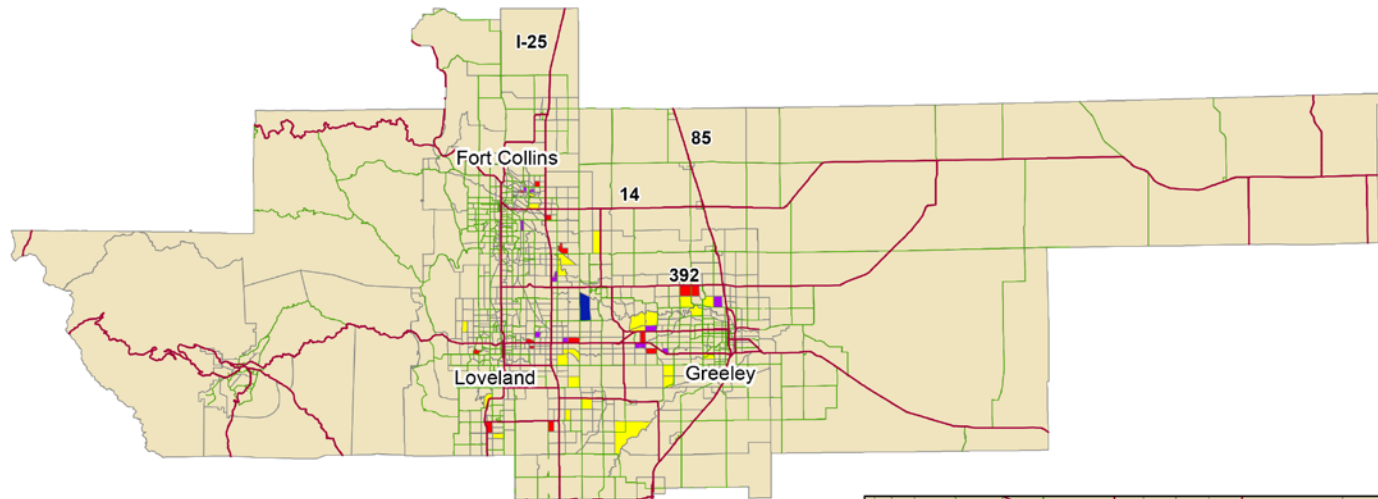
Households headed by persons aged 65 and older will have the most growth from 2010 to 2040



Source: 2040 Economic and Demographic Forecast North Front Range Metropolitan Planning Organization (NFRMPO) 2012-2013

2040 Regional Residential Growth

2040 Households by TAZ

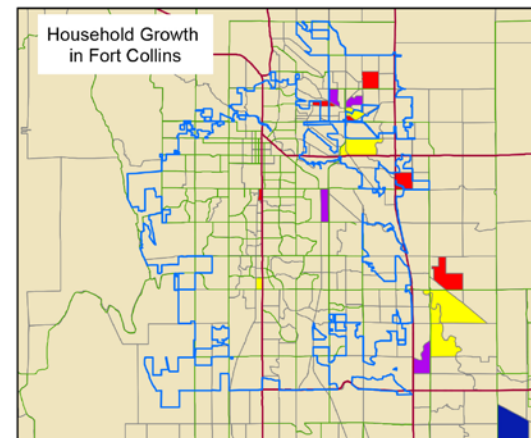


Legend

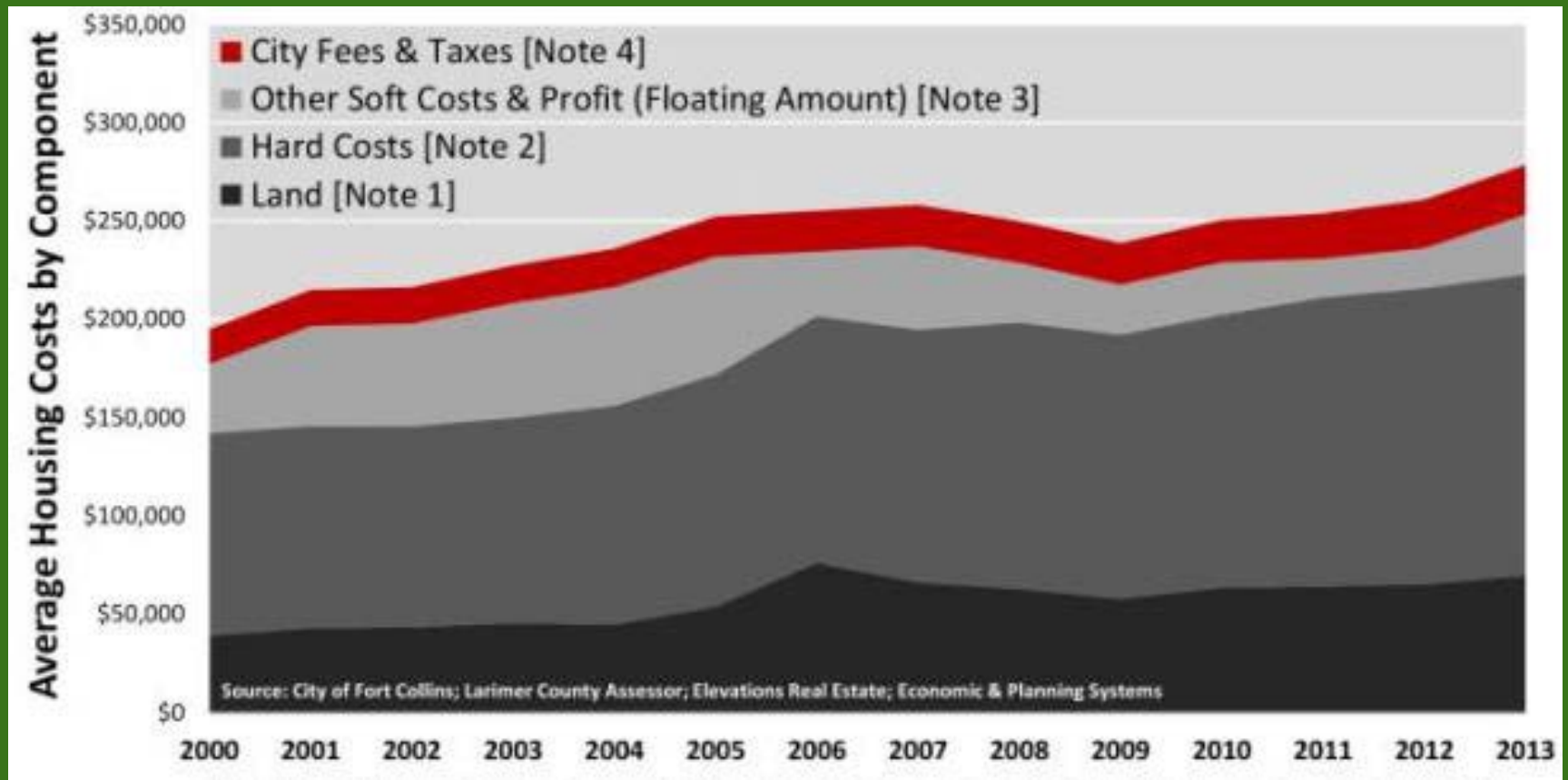
% Change in Households 2012-2040

- 0% - 33%
- 34% - 127%
- 128% - 279%
- 280% - 941%
- 942% - 3581%

Major Roads
Highways



Fort Collins Housing Costs

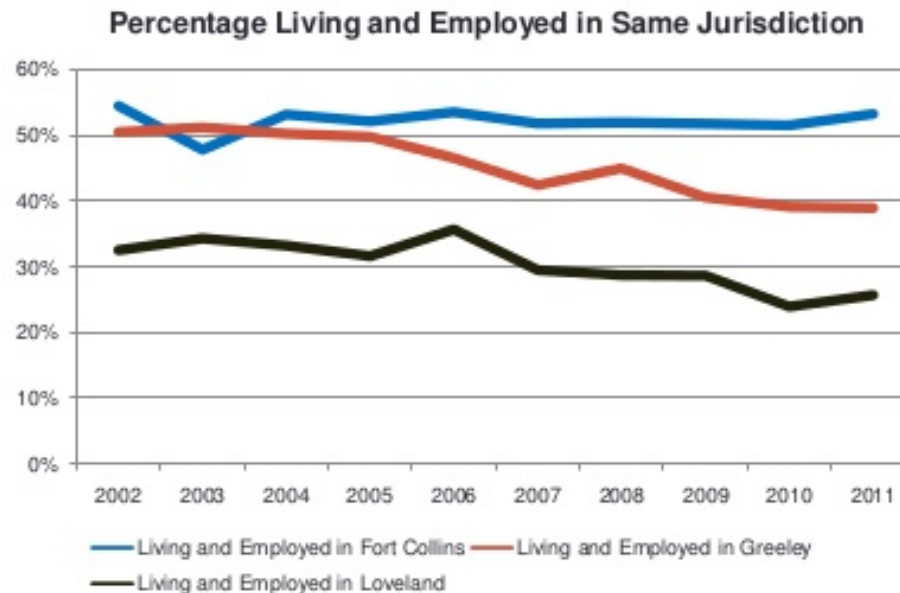


Trends in Housing Costs

- Increased hard costs
 - Materials
 - Building code requirements
- Increased land costs
 - Limited land supply
- City fees stable
 - Keeping track with inflation

Regional Demographics - Commutes

There is a trend showing more people traveling to other jurisdictions for employment



Census's OnTheMap tool, which uses 2002-2011 Longitudinal Employer-Household Dynamics (LEHD) Origin Destination Employment Statistics

Boulder & Fort Collins Commuting

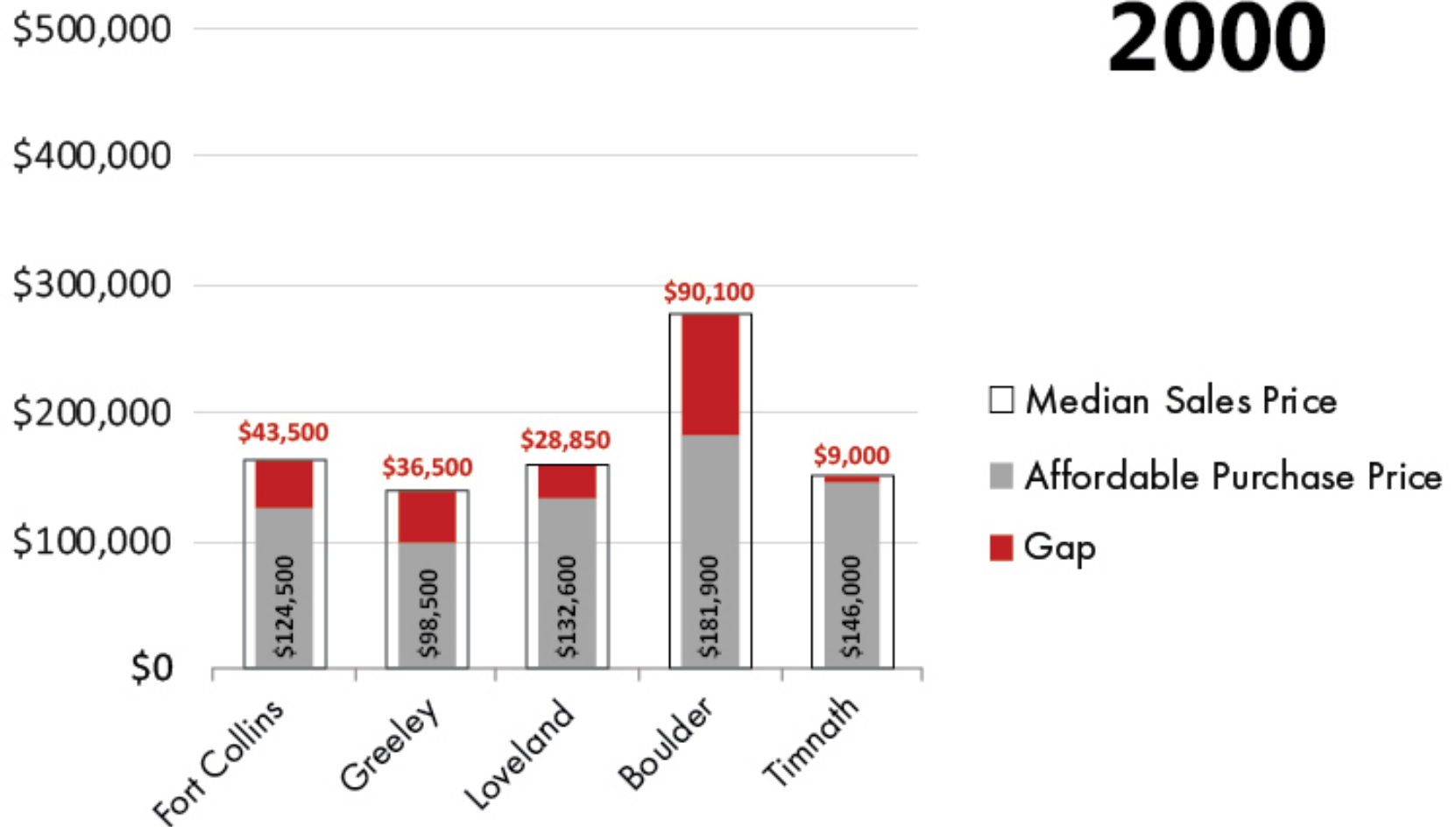
- Fort Collins
 - 55% of workers live in Fort Collins

Source: 2014 Housing Affordability Policy Study (HAPS)

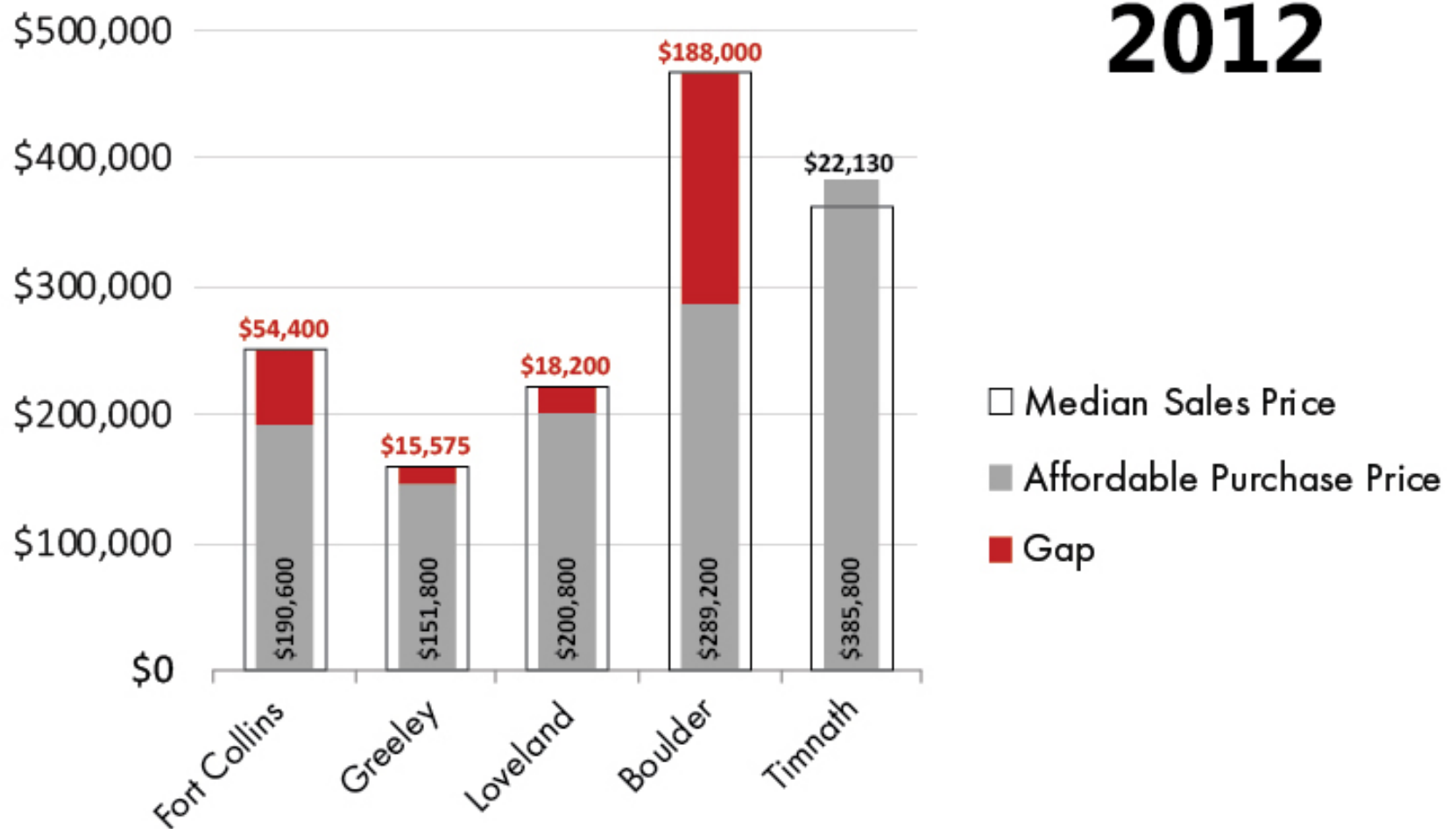
- Boulder
 - 33.7% of workers live in Boulder

Source: 2012 Commuting Patterns Survey, Boulder Economic Council

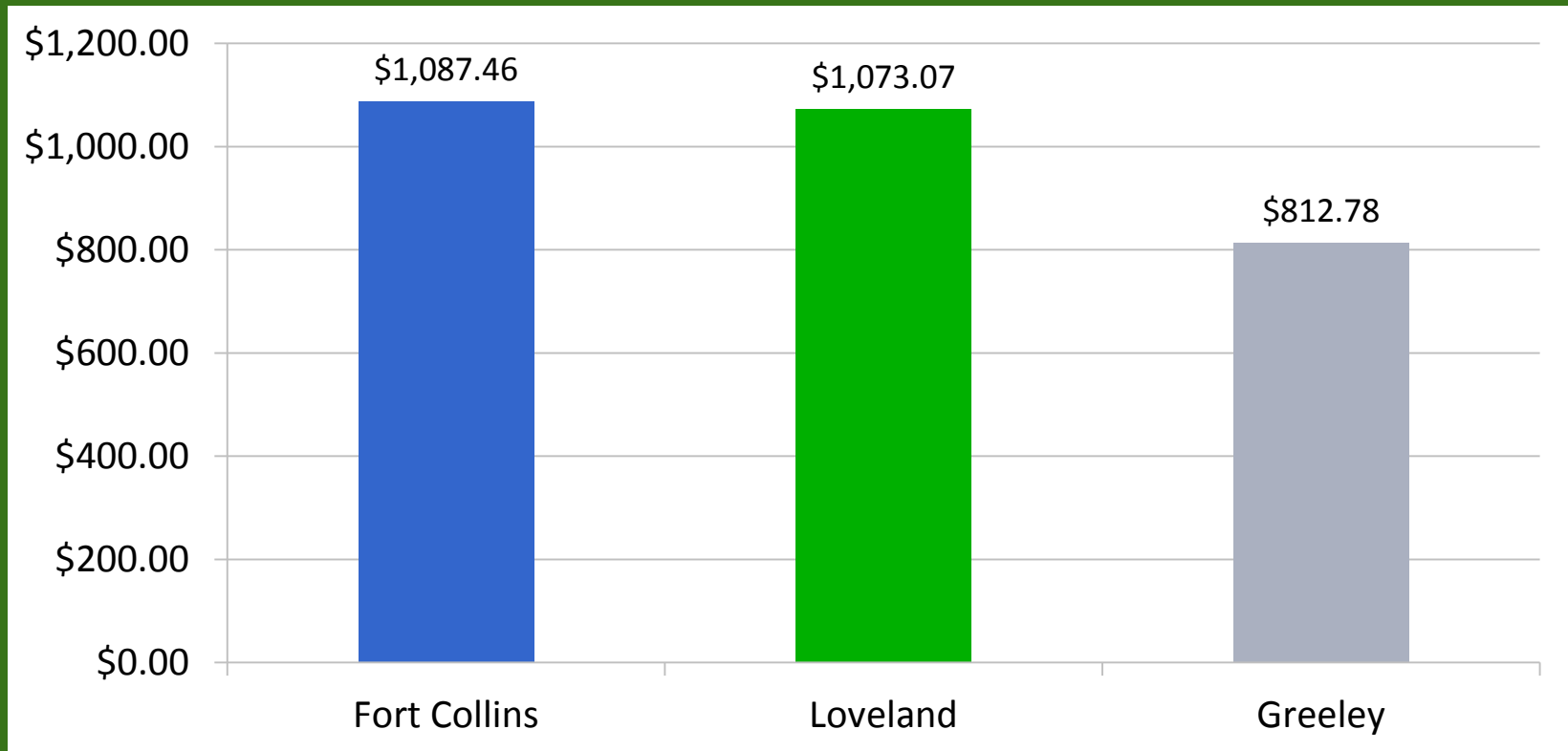
Housing Affordability 'Gaps' 2000 Comparison



Housing Affordability 'Gaps' 2012 Comparison

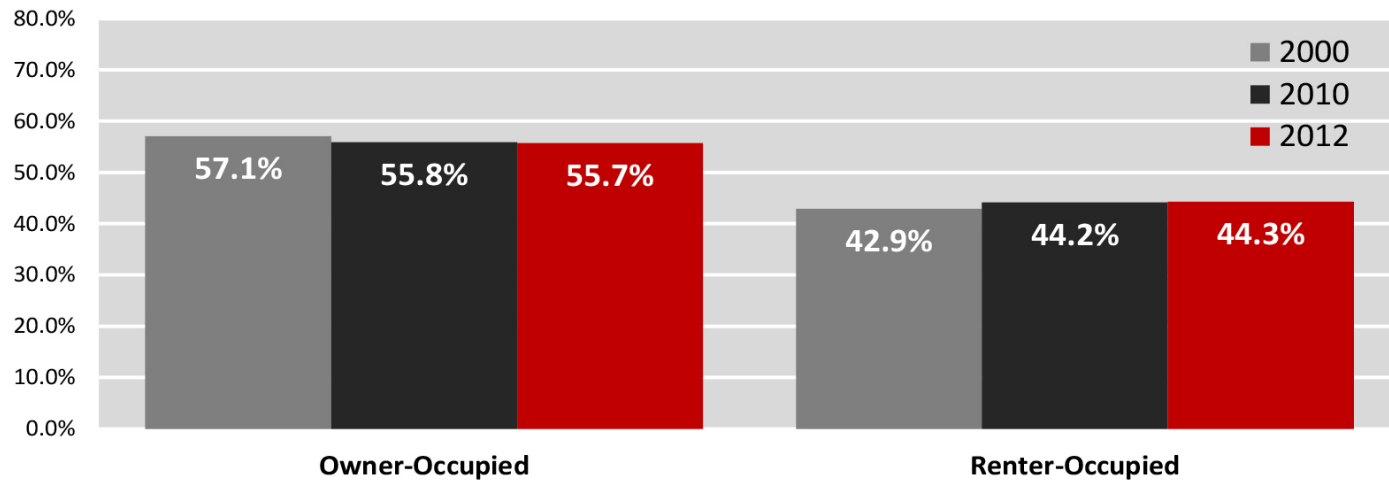


Average Rent

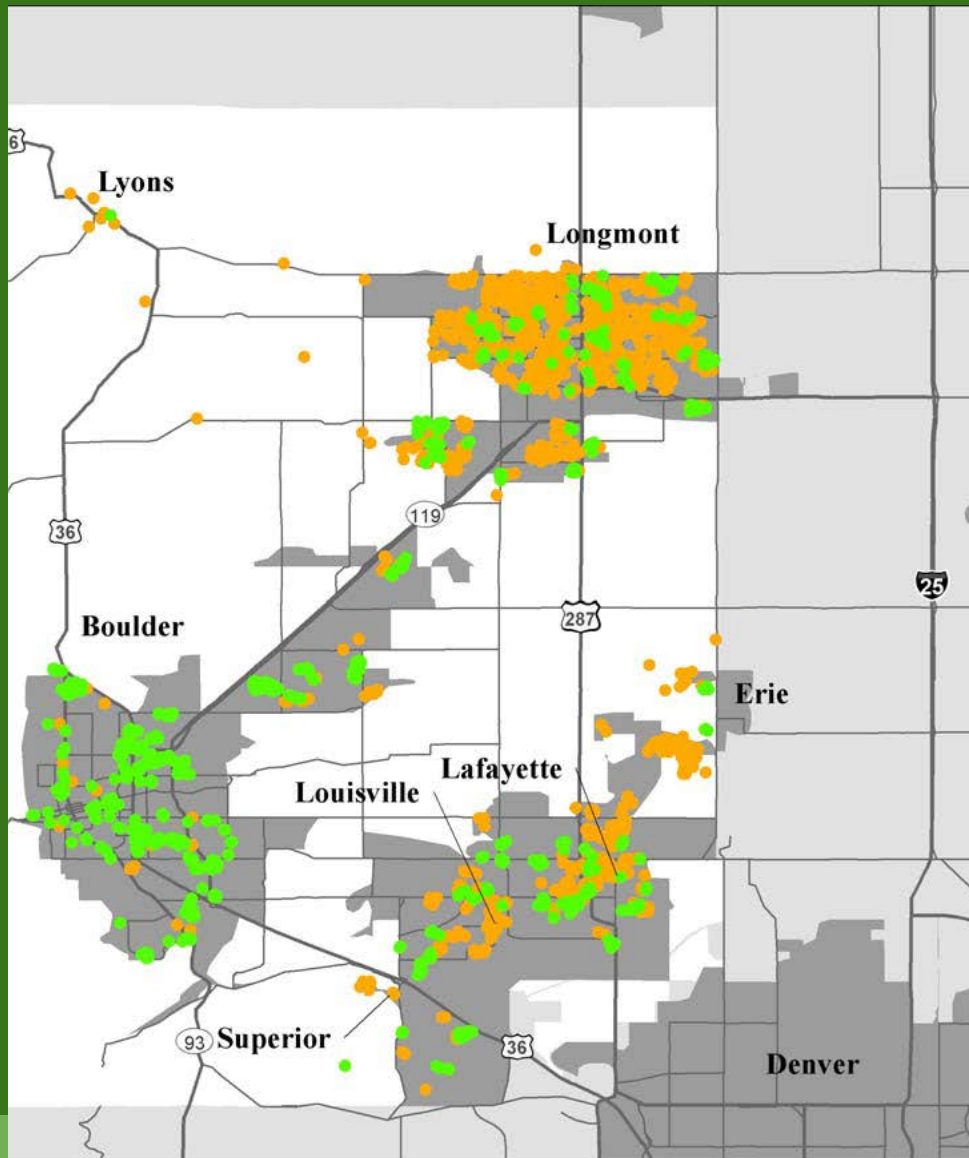


Source: Colorado Division of Housing, Multifamily Rental Report Q2 2014

Homeownership Statistics in Fort Collins



Source: U.S. Census; Economic & Planning Systems



Boulder Housing: Location of Affordable Households \$77k income

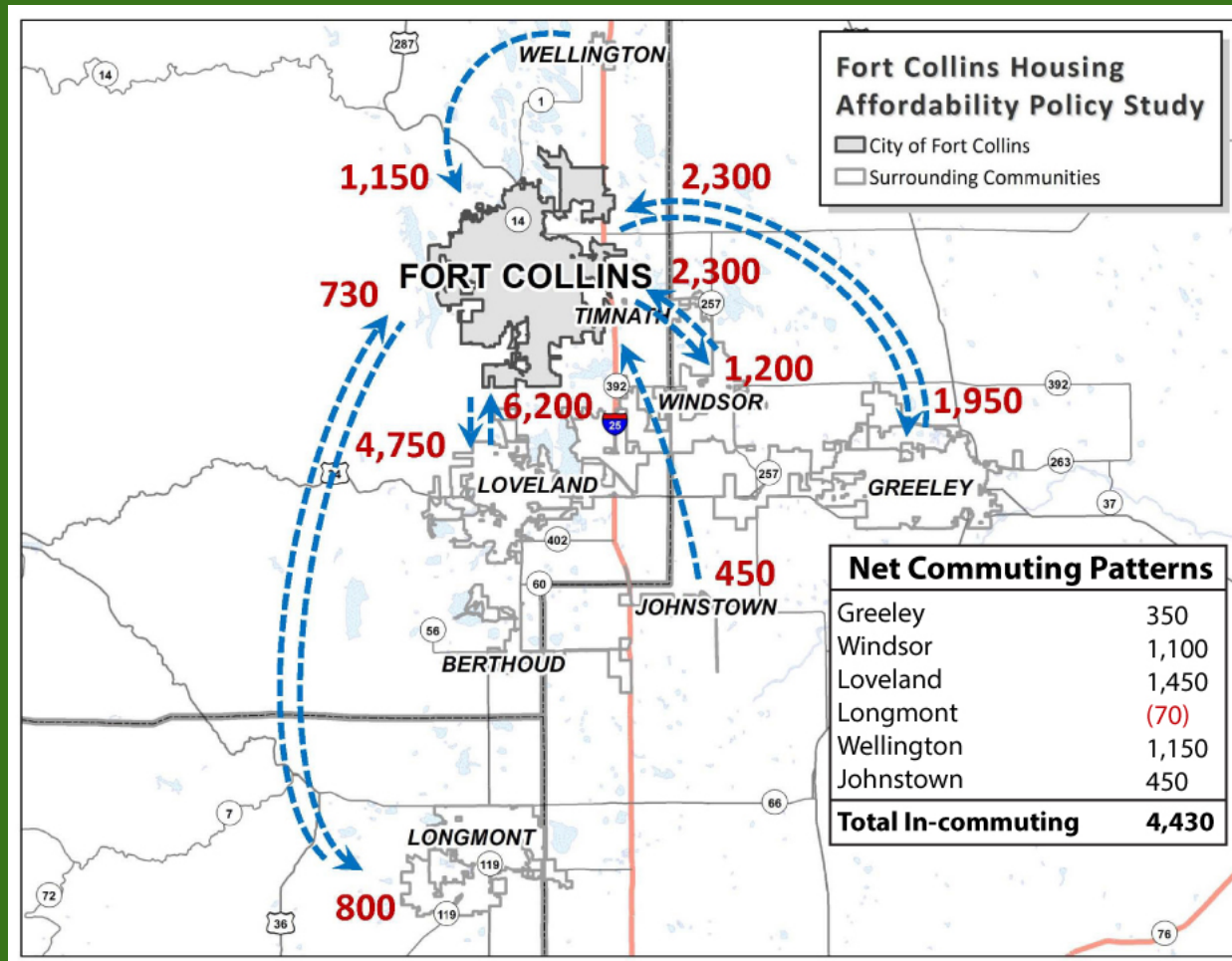
50,000 workers commute to
Boulder per day

Source: Boulder Co. Trends 2013

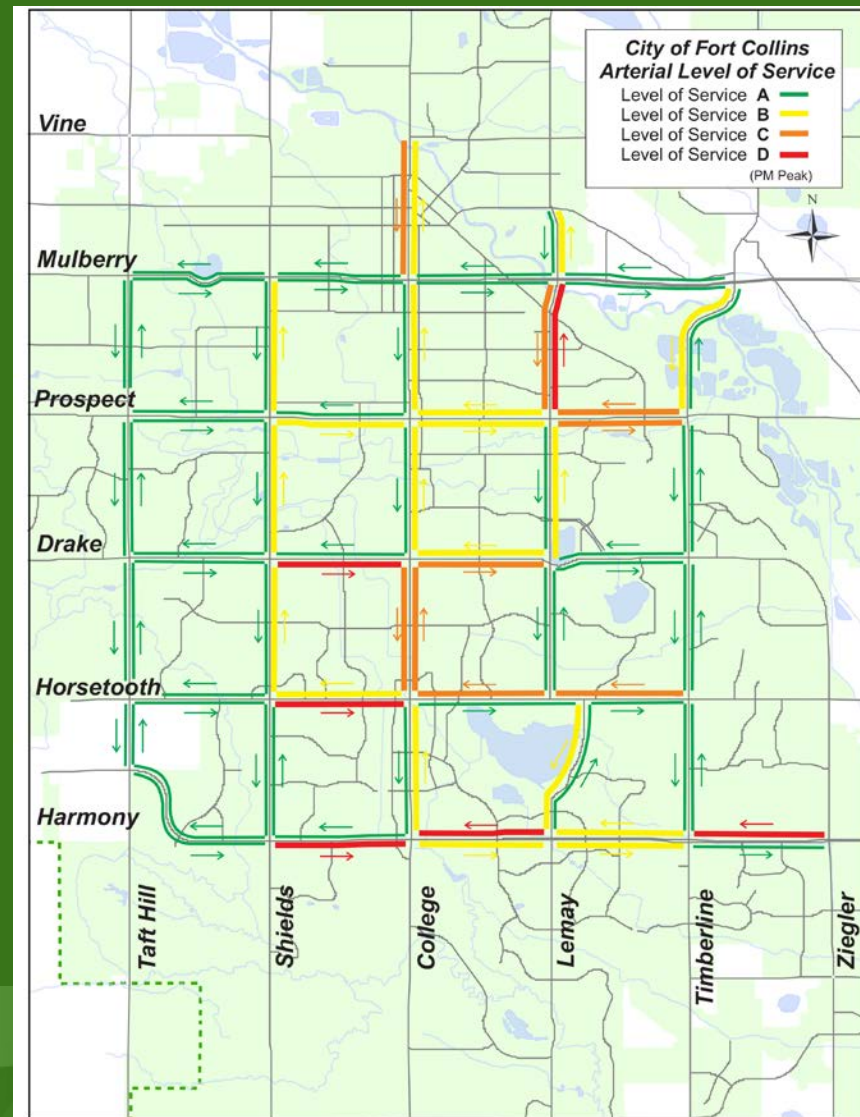
- Single Family Unit
- Attached Unit

Source: BBC Research & Consulting and 2012 MLS

Recent Shift in Commuting Patterns



Arterial Roads - Level of Service



Recapping the Data

- The North Front Range will continue to grow and its communities will be faced with growth-related challenges.
- Fort Collins Buildout Analysis depicts a 13-40+year land supply, dependent on the rate of growth and *City Plan*, and an ultimate population between 236,000- 255,000 residents.
- Community size and density substantially impact carbon emissions.

Need for Community Balance

- Data speaks to the need for a Balanced Community:
 - Balance of Housing and Jobs
 - Attainable housing relative to wages
 - A continuum of housing types in ‘complete’ and diverse neighborhoods
 - Employment and services near housing
 - A balanced transportation system