

3.0 RECENT TRENDS

Evaluation of social, economic, and transportation related trends in Fort Collins in recent years serves as a reference point in assessing the relative success of transportation and land use decisions with regard to policies adopted in the *1997 Transportation Master Plan (TMP)*. This chapter looks at emerging trends since the adoption of the TMP, specifically, trends that are related to or impact the transportation system.

3.1 SOCIO-ECONOMIC TRENDS

Population, housing, and employment trends and forecasts were evaluated as a part of the update to *City Plan* and documented in a Market Analysis. These trends served as a basis for planning level analysis to determine the amount of land consumed in recent years, the amount required to accommodate forecasted growth and development, and the amount of growth that will occur outside the Fort Collins Growth Management Area (GMA).

3.1.1 Population

Between 1990 and 2001, Fort Collins' population grew from 87,758 to 122,377 or by an annual average of 3,147 or 3.1 percent. An additional estimated 20,000 persons live in the GMA outside the City limits for a total estimated GMA population of 142,377.

Larimer County also grew by 3.1 percent annually between 1990 and 2001, from 183,136 to 259,572, or 6,949 per year. Fort Collins has remained a consistent percentage of the County's population at 47.2 percent through the last decade as shown in Table 3.1. The Fort Collins region is growing at a slightly higher rate than the state as a whole at 3.1 percent compared to 2.7 percent as shown.

Table 3.1
Historic Population Trends (1990-2001)

City	1990	1995	2000	2001	1990-1995		1995-2001		1990-2001	
					Annual #	Annual %	Annual #	Annual %	Annual #	Annual %
Fort Collins	87,758	103,210	118,652	122,377	3,090	3.3%	3,195	2.9%	3,147	3.1%
Larimer County	186,136	221,622	251,464	259,472	7,097	3.6%	6,308	2.7%	6,667	3.1%
Colorado	3,294,394	3,811,077	4,301,261	4,417,714	103,337	3.0%	101,106	2.5%	102,120	2.7%

2001 figures based on U.S. Census estimates for Larimer County and past trends

Source: US Census 1990, 2000, City of Fort Collins, Economic & Planning Systems

3.1.2 Employment

Between 1994 and 2000, there was an increase of approximately 15,000 jobs in the Fort Collins GMA, or an average of 2,500 jobs per year. The greatest growth occurred between 1994 and 1997, with an average increase of 2,832 jobs per year. Employment growth dropped by over 50 percent between 1997 and 2000 to an average of 1,844 jobs per year. Table 3.2 shows employment by sector for the Fort Collins area, based on the Standard Industrial Classification (SIC) code system that breaks down employment into general categories.

The greatest numbers of jobs and the greatest increases in number of jobs is in the services sector that grew by approximately 1,570 jobs per year between 1994 and 1997. While that sector remains dominant in 2000, its growth has slowed to approximately 485 jobs per year or an average annual increase of 1.8 percent.

Retail Trade provides the second largest number of jobs. Its greatest growth was seen between 1997 and 2000 rather than earlier in the decade. While Manufacturing enjoyed overall growth, adding 1,412 jobs between 1994 and 2000, the sector lost approximately 113 jobs between 1997 and 2000.

Table 3.2
Fort Collins Employment by Sector (1994-2000)

	1994	1997	2000	1994-1997 Change		1997-2000 Change	
				Annual #	Annual %	Annual #	Annual %
Agriculture, Forestry, & Fishing	593	924	832	110	15.9%	-31	-3.4%
Mining	5	20	102	5	58.7%	27	72.1%
Construction	3,325	4,243	4,982	306	8.5%	246	5.5%
Manufacturing	10,055	11,805	11,467	583	5.5%	-113	-1.0%
Transportation, Communications, Public Utilities (TCPU)	2,230	1,983	2,364	-82	-3.8%	127	6.0%
Wholesale Trade	1,734	1,886	2,153	51	2.8%	89	4.5%
Retail Trade	15,852	16,002	17,100	50	0.3%	366	2.2%
Finance, Insurance, and Real Estate (FIRE)	2,365	2,682	2,764	106	4.3%	27	1.0%
Services	21,793	26,504	27,959	1,570	6.7%	485	1.8%
Government	4,032	4,434	4,887	134	3.2%	151	3.3%
Other	4	0	0	-1	0.0%	0	0.0%
TOTAL	61,988	70,483	74,610	2,832	4.4%	1,376	1.9%

Source: Economic & Planning Systems based on ES202 data from City of Fort Collins and DOLA

3.2 TRANSPORTATION TRENDS

The Fort Collins Advance Planning Department developed a monitoring and reporting system as a means to monitor established indicators that citizens and elected officials can use to measure the progress toward change affected by *City Plan*. The monitoring reports were published biennially, first in 1999, and again in 2001. Data is compiled on an ongoing basis for this monitoring effort. The Monitoring Report evaluates indicators including population, land use, housing, transportation, employment, and environmental conditions.

3.2.1 Vehicle Miles Traveled (VMT)

The amount of vehicle miles traveled (VMT) has and will continue to be a measurement tool used by municipalities and regional planning organizations to track the relative success of transportation planning efforts to effect behavioral changes reflected in mode choice. While analyzing VMT data over time for a particular area indicates the relative increase or decrease in the amount of travel taking place, it is also closely tied to the amount of growth in that area. As population and employment in an area increases, so will VMT.

As in the case of Fort Collins, growth rates over the past five years have been higher than anticipated, corresponding to above expected growth in VMT. Fort Collins has also led the North Front Range region in population and economic growth. This directly relates to higher increases in VMT within Fort Collins, as more trips are made to and from Fort Collins for both business and pleasure.

Fort Collins has previously reported VMT as part of the *City Plan Monitoring Project*. Trends in VMT within Fort Collins are shown in Table 3.3. The large growth in VMT is contributed to a number of factors including:

- Increases in population and employment
- Large increases in high-income housing units that travel more and are less likely to use alternative modes than lower income groups
- Development of new single-use, low density subdivisions on the fringes of Fort Collins
- Drop in gasoline prices during this period
- Longer average trip length

Table 3.3
Vehicle Miles Traveled in Fort Collins (1995-2000)

Year	VMT
1995	2,399,000
1998	2,801,000
2000	3,078,591
Total Increase	679,591
Percent Increase	28.3%
Annual Growth Rate	4.9%

Source: North Front Range Transportation and Air Quality Planning Council Mobility Report Card and Fort Collins Land Use Transportation Air Quality (LUTRAQ) Team

3.2.2 Transportation Mode Split

With the adoption of the 1997 TMP, the City set forth a benchmark to achieve a ten percent mode shift from the single occupant vehicle (SOV) by the year 2015. This can be measured by evaluating the percentage of SOVs based on results from household surveys taken within the Fort Collins area.

In response to past and anticipated increase in automobile travel and congestion in the region, the North Front Range Metropolitan Planning Organization (MPO) began developing a *Mobility Report Card* in 1995. Its purpose is to track changes in travel behavior and evaluation of the region's travel demand management program. The first report was published in 1995 and the second in 1998. The data compiled in this report illustrates trends of SOV travel and other mobility measures. Table 3.4 shows these trends from 1995 to 1998. The *Mobility Report Card* was not prepared in 2001, so more recent data was not available for comparison.

Table 3.4
Single Occupant Vehicles in Fort Collins (1995-1998)

Year	Single Occupant Vehicle	Other Modes
1995	48%	52%
1998	53%	47%
Annual Increase (Decrease)	1.7%	(1.7%)
2015 Projection	34%	66%

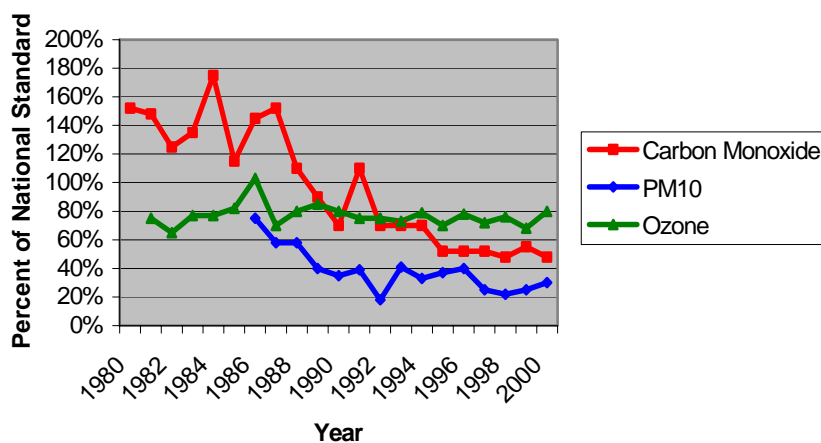
Source: North Front Range Transportation and Air Quality Planning Council Mobility Report Card

The increase in SOV travel indicates that a greater percentage of people are choosing to drive alone. These travel choices are influenced by factors including the type and location of new development within and surrounding Fort Collins. As SOV travel continues to rise in Fort Collins, greater stress is placed on the roadway network, demanding a greater need for capital improvements. As part of the *City Plan* Monitoring Project, SOV trips are evaluated to determine if they are reduced by at least one percent annually. Because SOV trips are not being reduced, this plan is re-evaluating the City’s long-term vision for SOV reduction to determine additional measures to achieve this goal.

3.2.3 Air Quality

Air quality is related to transportation in that automobile emissions are a large contributing factor to air pollution in metropolitan areas. Pollutants such as carbon monoxide (CO), particulate matter (PM₁₀), and ozone (O₃) are monitored and reported as part of the Colorado Department of Health and Environment’s network of air pollution monitors. These pollutants are also reported as results from the MOBILE 6 outputs as part of the transportation demand modeling completed as part of this plan. Air quality results are shown in Figure 3.1. The range of data shown illustrates how Fort Collins air quality has improved over the past 20 years. Values higher than 100 percent are worse than the standard, while values under 100 percent are better than the standard. Improvements in air quality are directly attributed to cleaner burning fuels and stricter emission standards for new vehicles.

Figure 3.1
Air Quality Monitoring Results (1980-2000)



Source: Colorado Department of Health and Environment, City Plan 2001 Indicator Report

3.3 LAND USE AND HOUSING TRENDS

Land use and housing are integrally tied to transportation in that the type, location, and size of development that occurs both within Fort Collins and in the surrounding communities will directly affect the number of trips made to and from the City on the local roadway network. High-density development patterns, including a combination of residential and commercial land uses provide a larger population base with more origin and destination points, making transit a more viable transportation mode for the area. Single-family housing units typically produce a greater number of automobile trips per unit, compared to multi-family housing units, reflecting a greater number of vehicles on the roadway network, or in more densely populated areas, a greater number of potential transit trips. Land use and housing trends are provided to give a perspective on the nature of the trips that are being generated.

3.3.1 Mixed-Use Development

The mix of land uses within a given area contributes to numerous factors that influence travel behavior patterns. If an area develops exclusively as a residential community, with little or no associated commercial development nearby, residents in this new development are virtually forced to travel by automobile to reach commercial or employment destinations, unless transit services are provided within a close radius of the development. Mixed-use development that is well designed with sidewalks and connecting paths between residential, commercial, and open spaces promote pedestrian and bicycle travel. If transit is provided to the development, sidewalks provide access to the adjacent transit routes. Typically, lower density residential development, that is often a desirable housing style for new development, contributes additional strain on the transportation network. This results in longer trip lengths by residents traveling to commercial and employment destinations at greater distances from their home. Table 3.5 shows the number of low-density mixed-use districts serviced by neighborhood centers.

Table 3.5
Mixed-Use Served by Neighborhood Centers (2000)

	Number of Units	Percent of Total Units
Low Density Districts served by Existing or Planned Neighborhood Centers	2,291	38%
All Low Density Districts	6,018	100%

Source: City of Fort Collins Advance Planning and Current Planning Departments, Larimer County Assessors Office

3.3.2 Single-Family/Multi-Family Housing Split

The split between single-family housing and multi-family housing units has remained at approximately 60 percent single-family to 40 percent multi-family units between 1995 and 2000. This ratio is generally considered a desirable housing split. The number of multi-family housing units created in one year is determined by regular cycles of the housing market when an over supply or under supply of multi-family units exists. Creation of new units is also influenced by land availability in low- and medium-density neighborhoods, as provided by the *Land Use Code*. Table 3.6 shows the overall number of housing units in Fort Collins from 1995 to 2000.

Table 3.6
Overall Housing Units (1995-2000)

	1995	1996	1997	1998	1999	2000
Single Family Units	24,488	25,355	26,435	27,365	28,527	29,671
% Single-Family	60.5	60.8	61.1	61.5	61.8	62.0
Multi Family Units	15,992	16,357	16,859	17,124	17,665	18,413
% Multi-Family	39.5	39.2	38.9	38.5	38.2	38.0
Total Units	40,480	41,712	43,294	44,489	46,192	47,755

Source: 2000 Census, City of Fort Collins Advance Planning Department

3.3.3 Housing Density

Housing density is perhaps one of the largest contributing factors to the ability to capture transit ridership. However, housing density is not necessarily always closely related to commercial development, another contributing factor in transit capture. New development in Fort Collins located outside the infill development area is based on the goal of achieving an overall minimum average density of five dwelling units per acre, with a mix of housing types. Overall, low-density housing developments have been exceeding the minimum density goal of five units per acre since 1997. It is likely that projects will continue to meet this requirement, unless significant changes are made to the Land Use Code and zoning ordinances. Table 3.7 shows the relative densities of recently approved residential developments in low-and medium density districts.

Table 3.7
Density of Approved Development (1997-2000)

	Single-Family Units	Multi-Family Units	Total Units	Gross Acres	Net Density	Gross Density
Low-Density Districts	1,849	1,636	3,485	806.6	7.76	7.01
Medium Density Districts	117	121	238	56.83	11.92	11.67

Source: City of Fort Collins Planning Department

In general, land use and development trends have been consistent with the goals set forth in *City Plan*, and are likely to continue these positive trends into the future, as the City continues to foster the type, location and quality of new development that is reflective of *City Plan* goals and policies.

This chapter has documented recent trends for both VMT and SOV travel that indicate both measures are increasing as the population and employment opportunities in the City concurrently increase. These trends are contrary to goals and policies adopted as part of the 1997 TMP and *City Plan*. While travel behavior is highly influenced by development patterns, it is also more directly affected by transportation decisions related to capital improvements and facility construction. Chapter 2 further discusses policy issues related to VMT and SOV travel and how the City should approach future policy statements.