Metro Vision gap analysis (part two)

Comparing 2050 small-area forecast to regional aspirations and areas of continuous improvement
Overview

<table>
<thead>
<tr>
<th>Item</th>
<th>Question focus</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sept. Board item</td>
<td>Why are we growing and by how much?</td>
</tr>
<tr>
<td>Oct. Board item</td>
<td>How are we growing?</td>
</tr>
<tr>
<td>Dec. BWS item</td>
<td>Where are we growing?</td>
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</tbody>
</table>

**Note:** Recent and upcoming staff analysis and presentations are leveraging a completed product - final small area forecast (anticipated growth and development trends), 2050 Metro Vision Regional Transportation Plan is currently being developed.
DRCOG Strategic Planning Model and Metro Vision

What continuous improvement activities will support our outcomes?

Strategic ‘altitude’

30,000 ft

25,000

15,000

Ground level

Mission

Vision

Strategic Perspectives (N/A)

Overarching Themes and Outcomes

Objectives

Strategy Map (N/A)

Performance Measures and Targets

Strategic Initiatives

DRCOG Strategic Planning Model and Metro Vision

What continuous improvement activities will support our outcomes?
Let’s quiz… Part One (population growth)

How much are counties in the region growing? How much have they grown in recent decades?

Which county saw the **largest population increase** from **1990 through 2000**?
Which county saw the **largest population increase** from **2000 through 2010**?
Which county saw the **largest population increase** from **2010 through 2020**?
Which county is **forecast** to see the **largest population increase** from **2020 through 2030**?

Options: Adams, Arapahoe, Boulder, Broomfield, Denver, Douglas or Jefferson

- Adams: 86,000
- Arapahoe: 97,400
- Boulder: 50,200
- Broomfield: n/a
- Denver: 88,900
- Douglas: 118,900
- Jefferson: 86,800

Population growth, 2000-2010

- Adams: 92,000
- Arapahoe: 84,100
- Boulder: 19,400
- Broomfield: 17,600
- Denver: 48,100
- Douglas: 106,600
- Jefferson: 8,900

Population growth, 2010-2020

Adams: 85,100
Arapahoe: 90,200
Boulder: 35,400
Broomfield: 16,700
Denver: 133,000
Douglas: 67,200
Jefferson: 50,400


Population growth, 2020-2030

<table>
<thead>
<tr>
<th>County</th>
<th>Growth (2020-2030)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adams</td>
<td>108,700</td>
</tr>
<tr>
<td>Arapahoe</td>
<td>73,800</td>
</tr>
<tr>
<td>Boulder</td>
<td>32,500</td>
</tr>
<tr>
<td>Broomfield</td>
<td>21,200</td>
</tr>
<tr>
<td>Denver</td>
<td>87,000</td>
</tr>
<tr>
<td>Douglas</td>
<td>54,500</td>
</tr>
<tr>
<td>Jefferson</td>
<td>39,600</td>
</tr>
</tbody>
</table>


Let’s quiz… Part Two (employment growth)

How much are counties in the region growing?
How much have they grown in recent decades?

Which county saw the largest employment increase from 1990 through 2000?
Which county saw the largest employment increase from 2000 through 2010?
Which county saw the largest employment increase from 2010 through 2020?
Which county is forecast to see the largest employment increase from 2020 through 2030?

Options: Adams, Arapahoe, Boulder, Broomfield, Denver, Douglas or Jefferson
Employment growth, 1990-2000

- Adams: 59,800
- Arapahoe: 131,400
- Boulder: 72,300
- Broomfield: n/a
- Denver: 96,400
- Douglas: 51,300
- Jefferson: 55,500

Employment growth, 2000-2010

- Adams: 25,800
- Arapahoe: -1,900
- Boulder: -13,600
- Broomfield: 35,800
- Denver: -72,900
- Douglas: 56,000
- Jefferson: 18,600

Employment growth, 2010-2020

- Adams: 79,300
- Arapahoe: 95,400
- Boulder: 47,100
- Broomfield: 14,200
- Denver: 157,700
- Douglas: 51,600
- Jefferson: 56,200


Employment growth, 2020-2030

- Adams: 66,000
- Arapahoe: 55,100
- Boulder: 17,800
- Broomfield: 24,700
- Denver: 38,300
- Douglas: 65,600
- Jefferson: 25,000


Objective: Promote investment/reinvestment in existing communities.

Total household growth captured 2010-2050

2010 low- or medium-density block
2-10 household per acre

2010 high-density block
10+ households per acre

2050 low- or medium-density block
2-10 household per acre

2050 high-density block
10+ households per acre

Areas shown account for 30% of total household growth
Objective: Contain urban development in locations designated for urban growth and services.

Total household growth captured 2010-2050

- **2010 sparse block**<1 households per acre
  - 35%
- **2050 low- or medium-density block** 2-10 household per acre
  - 2050 high-density block 10+ households per acre
  - 15%

Areas shown account for **50%** of total household growth

Map Disclaimer: DRCOG makes no claims, representations, or warranties, express or implied, concerning the validity (express or implied), the reliability or the accuracy of the data herein, including the implied validity of any uses of such data. DRCOG shall have no liability for the data or lack thereof, or any decisions made or action not taken in reliance upon any of the data.

City of Aurora, CO, County and City of Denver, County of Arapahoe, Esri, HERE, Garmin, SaltGraph, FAO, ME1/NASA, USGS, EPA, NPS, Esri, CISM, USGS.
Objective: Promote investment/reinvestment in existing communities.

Total **job growth** captured 2010-2050

- **2010 other blocks**
  - Less than 10 jobs per acre
  - 46%

- **2010 high-density employment blocks**
  - 10+ jobs per acre
  - 37%

- **2050 other blocks**
  - Less than 10 jobs per acre
  - 17%

- **2050 high-density employment blocks**
  - 10+ jobs per acre
Where are we growing, 2020-2050, relative to 2010 census urban area?

Within 2010 census urban area of household growth: 62%, Beyond: 38%

Within ½ mile of job growth: 84%, Beyond: 16%

Beyond the 2010 census urban area of household growth: 22%

Beyond the 2010 census urban area of job growth: 9%

What’s the resulting total share in the 2010 urban area?

<table>
<thead>
<tr>
<th>Year</th>
<th>Share of total</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Households</td>
</tr>
<tr>
<td>2020</td>
<td>93%</td>
</tr>
<tr>
<td>2050</td>
<td>85%</td>
</tr>
</tbody>
</table>

Objective: Contain urban development in locations designated for urban growth and services.
Objective: Contain urban development in locations designated for urban growth and services.
Objective: Coordinate local and regional urban growth priorities… within regionally designated growth areas.

215,000+ housing units in master-planned communities

- Note: Many totals shown are estimated build-out year beyond 2050
- Small-area forecast attempts to balance local growth expectations with assumptions of growth deceleration (2030-2050)
Objective: Increase housing and employment in urban centers.

Share not increasing as envisioned

Aspiration

<table>
<thead>
<tr>
<th>URBAN CENTER HOUSING</th>
<th>URBAN CENTER EMPLOYMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Share of total housing units</td>
<td>Share of total employment</td>
</tr>
<tr>
<td>2014 Baseline</td>
<td>10.0%</td>
</tr>
<tr>
<td>2018 Observation</td>
<td>11.7%</td>
</tr>
<tr>
<td>2040 Target</td>
<td>25.0%</td>
</tr>
</tbody>
</table>

Small-area forecast

<table>
<thead>
<tr>
<th>Year</th>
<th>Share of Households</th>
<th>Share of Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>8.8%</td>
<td>37.4%</td>
</tr>
<tr>
<td>2020</td>
<td>10.8%</td>
<td>35.6%</td>
</tr>
<tr>
<td>2030</td>
<td>12.7%</td>
<td>34.4%</td>
</tr>
<tr>
<td>2040</td>
<td>13.2%</td>
<td>33.1%</td>
</tr>
<tr>
<td>2050</td>
<td>13.0%</td>
<td>32.1%</td>
</tr>
</tbody>
</table>
Objective: Increase housing and employment in urban centers.
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Urban center growth

- Household growth (thousands)
- Job growth (thousands)

2020 rank
- Top 50 percent of urban centers
- Bottom 50 percent of urban centers

Decade
- 2020-2030
- 2030-2040
- 2040-2050
Objective: Improve access to and from the region’s developed and emerging housing and employment centers.

- Identified groups of blocks that have **6 or more jobs per acre** and **10,000 or more jobs in total**

- Geography expands to “grow” existing centers and **add emerging** employment centers

- **20-30** employment aggregations over forecast period

<table>
<thead>
<tr>
<th>Year</th>
<th>Employment identified</th>
<th>Employment share</th>
<th>Area share</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>697,600</td>
<td>42%</td>
<td>0.6%</td>
</tr>
<tr>
<td>2020</td>
<td>1,048,600</td>
<td>49%</td>
<td>1.1%</td>
</tr>
<tr>
<td>2030</td>
<td>1,299,600</td>
<td>53%</td>
<td>1.4%</td>
</tr>
<tr>
<td>2040</td>
<td>1,472,000</td>
<td>54%</td>
<td>1.6%</td>
</tr>
<tr>
<td>2050</td>
<td>1,696,600</td>
<td>57%</td>
<td>1.9%</td>
</tr>
</tbody>
</table>
Partner activity that will consider 2050 small-area forecast

MV Objective: Improve opportunities for recreation and access to nature

- This project will develop a … suite of decision-making tools to identify high-priority places in the metro Denver region to protect, connect, restore, and enhance for people and nature.
Existing direction and guidance

October Board discussion:
Data suggests region is not making adequate progress on supplying affordable/attainable housing
• A "deeper dive" on this issue is warranted
• More current data sources (vs. "lag" data) would be helpful for local and regional analysis and initiatives

Existing Metro Vision priorities:
Urban centers: long-standing priority – more analysis needed to understand "under performance" in forecast
Reducing transportation-related GHG emissions / alignment with GHG Roadmap (also noted in October)
Additional direction and guidance requested

Director input requested:
- "deeper dive" topics
- priorities/focus areas (if any) for coordinated regional efforts

Next steps:
- Additional research, presentations on identified topics
- Focused, topic-specific conversations to identify and/or advance shared initiatives
- Metro Vision amendment (2021)
  - performance measure/target amendments
  - potential to account for priorities/focus areas