

Grand Profile Community Presentation

Initial Data and Findings



Granby Ranch
November 5, 2014

Overview

Grand Profile Overview



What is the Grand Profile?



Purpose of the Grand Profile

Community Assets (People & Physical Assets)



Demographics



Education



Public Assets



Housing Supply

Economic Trends and Markets



Economic Structure and Trends



Employment



Business Profile



Summer Visitor Profile



Resident Profile

Grand Profile Overview

Grand Profile Overview



What is the Grand Profile?



Purpose of the Grand Profile

? What is the Grand Profile?

- In 2013 our communities started looking at creating a community profile, an overview and description of our area. Several meetings with stakeholders were held to talk about what type of data we all need in order to make informed decisions. Through these meetings a laundry list of over 5 pages of data sets/types were compiled.
- Several reoccurring themes kept coming to the surface including the fact that:
 - Many of the data sets were incomplete and at times, appeared inaccurate
 - Creating a Community Profile was great but by the time a report was published that many of these data sets were out of date
- With the assistance of the Steering Committee which includes Directors from the area Chamber of Commerce's, Town Managers, County Representatives including the Grand County Office of Economic Development and other stakeholders, the Grand Profile Project was created and is funded by the Grand County Board of County Commissioners

? What is the Grand Profile?

- The Grand Profile was created with the following goals:
 - To create a comprehensive collection of economic data sets for Grand County
 - To evaluate those data sets for accuracy
 - To develop a way to update all of the data sets on an on-going basis so that the data is always current
 - To create mechanisms that allow local governments, business owners, organizations and individuals to have the ability to interact with the data collected
- The data that is available today will be made available online and in printed newsletters in the coming months
- We would like to thank the participants of the Grand Profile Steering Committee, the community leaders in our communities and the Grand County Board of County Commissioners for their dedication to providing insight and context to the data in our communities

Grand Profile Overview



What is the Grand Profile?



Purpose of the Grand Profile

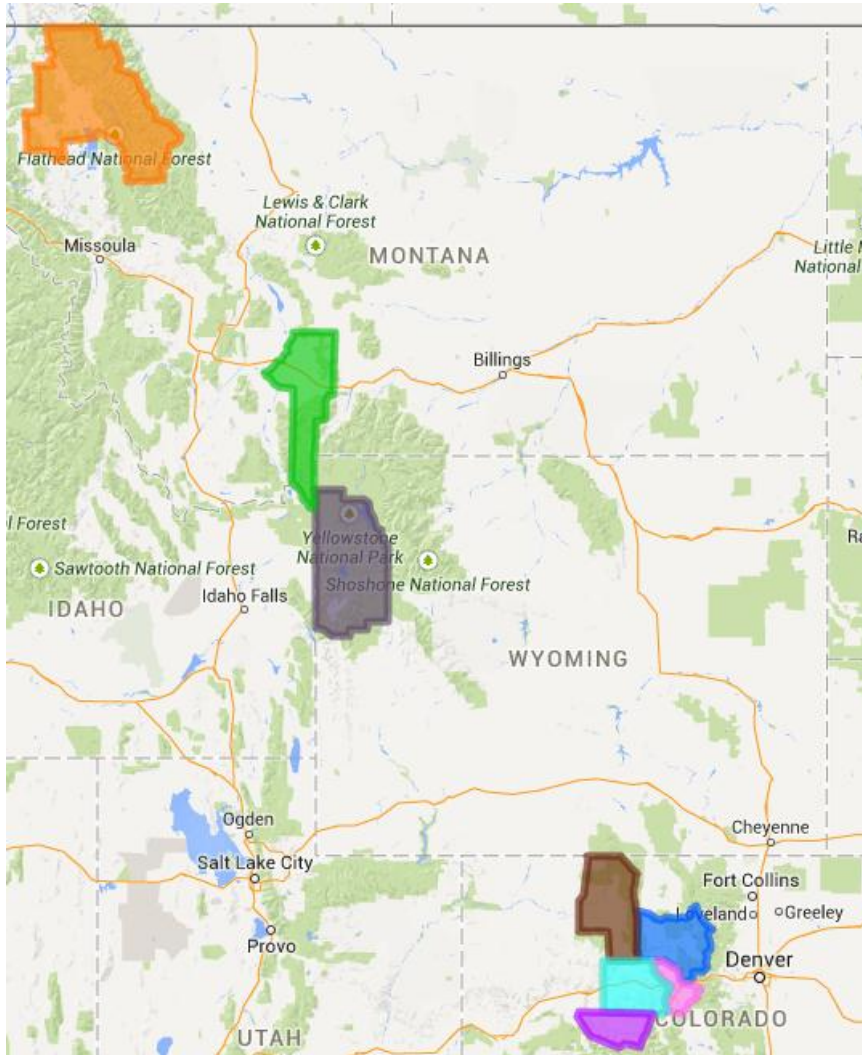


Grand Profile Overview





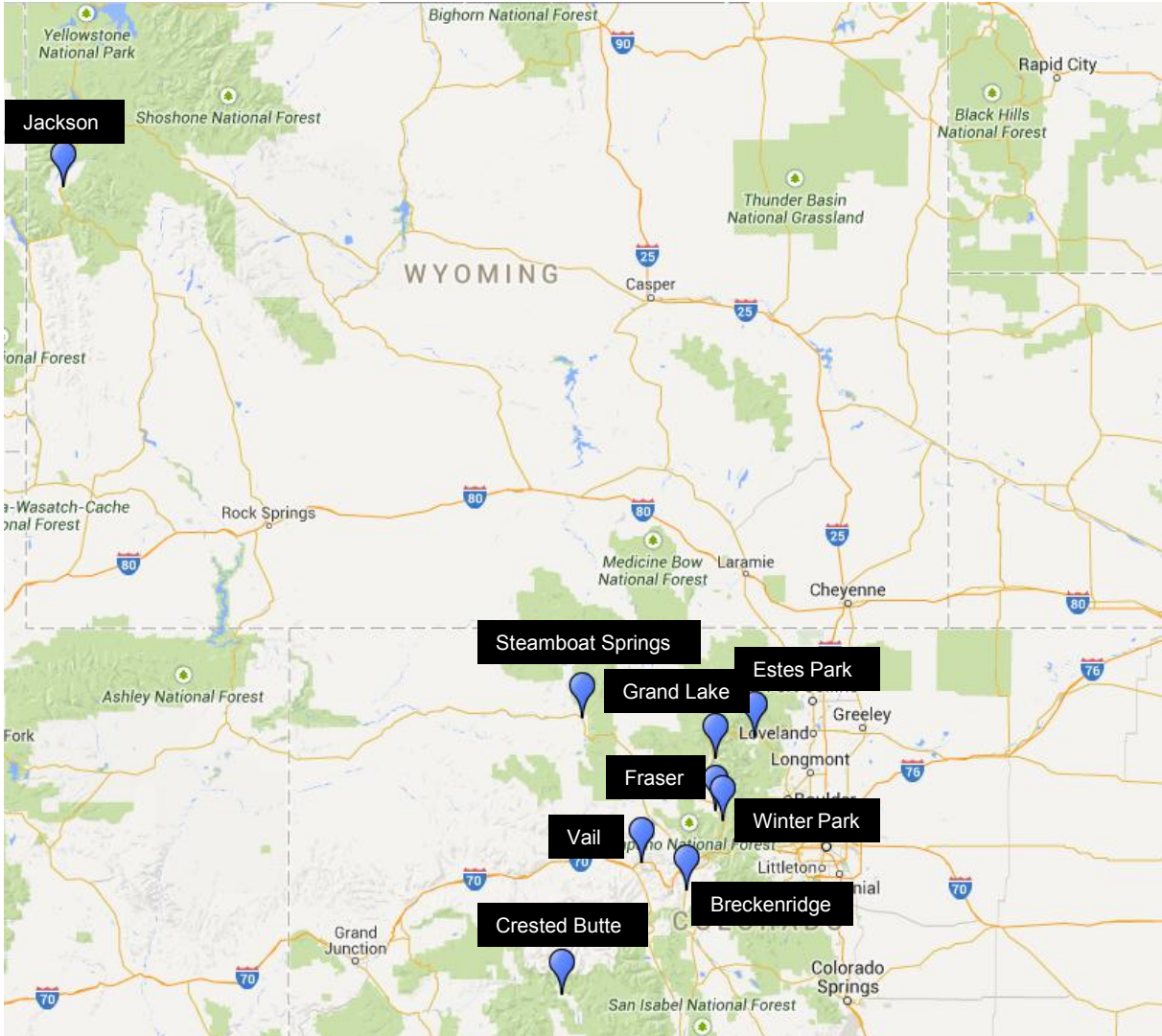
Competitive Analysis – by County



County Competitive Set

- Grand, CO
- Routt, CO
- Summit, CO
- Eagle, CO
- Pitkin, CO
- Teton, WY
- Flathead, MT
- Gallatin, MT

Competitive Analysis – by Community



Community Competitive Set

- Winter Park, CO
- Fraser, CO
- Grand Lake, CO
- Estes Park, CO
- Steamboat Springs, CO
- Jackson, WY
- Vail, CO
- Breckenridge, CO
- Crested Butte, CO

Community Assets

Community Assets



Demographics



Education



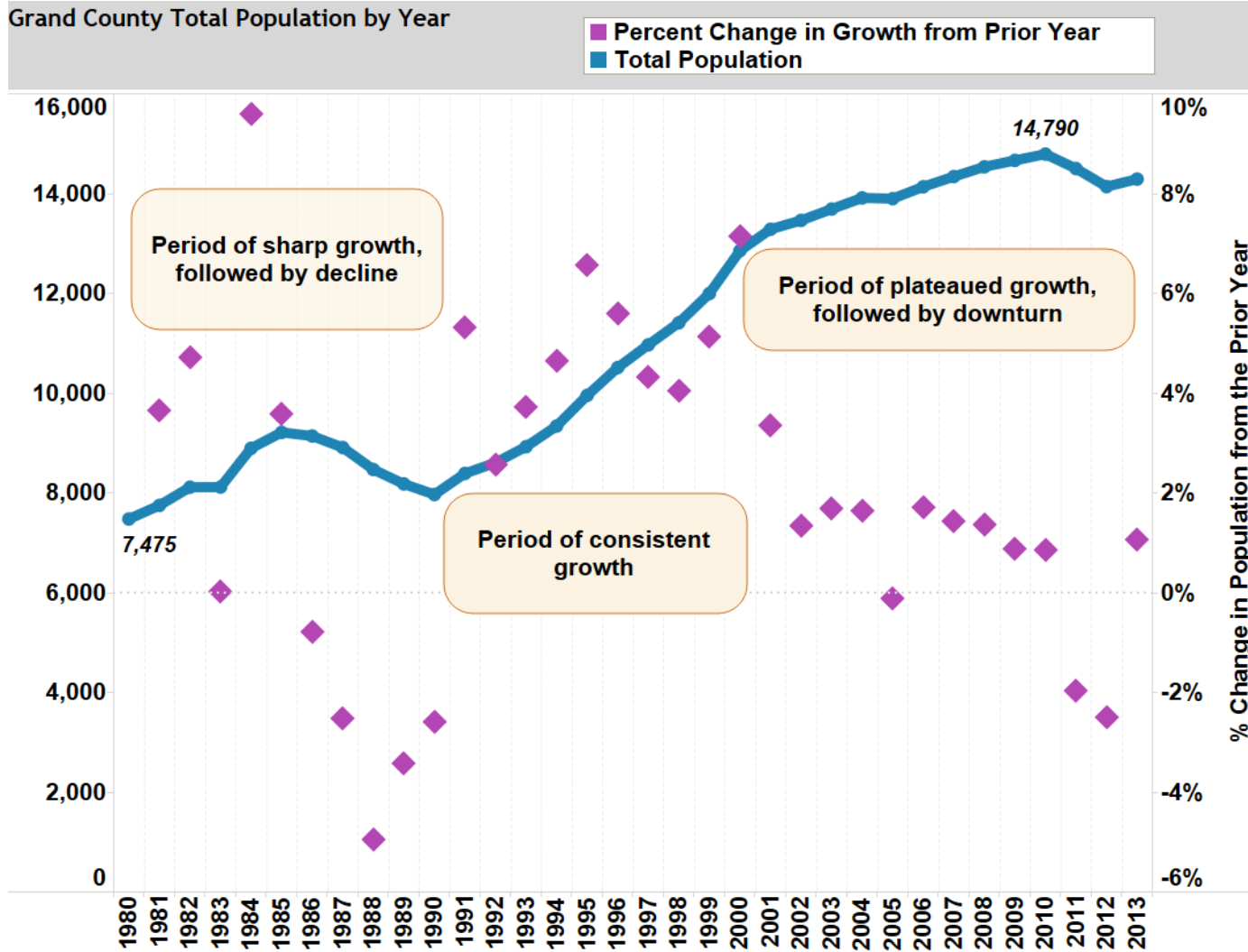
Public Assets



Housing Supply



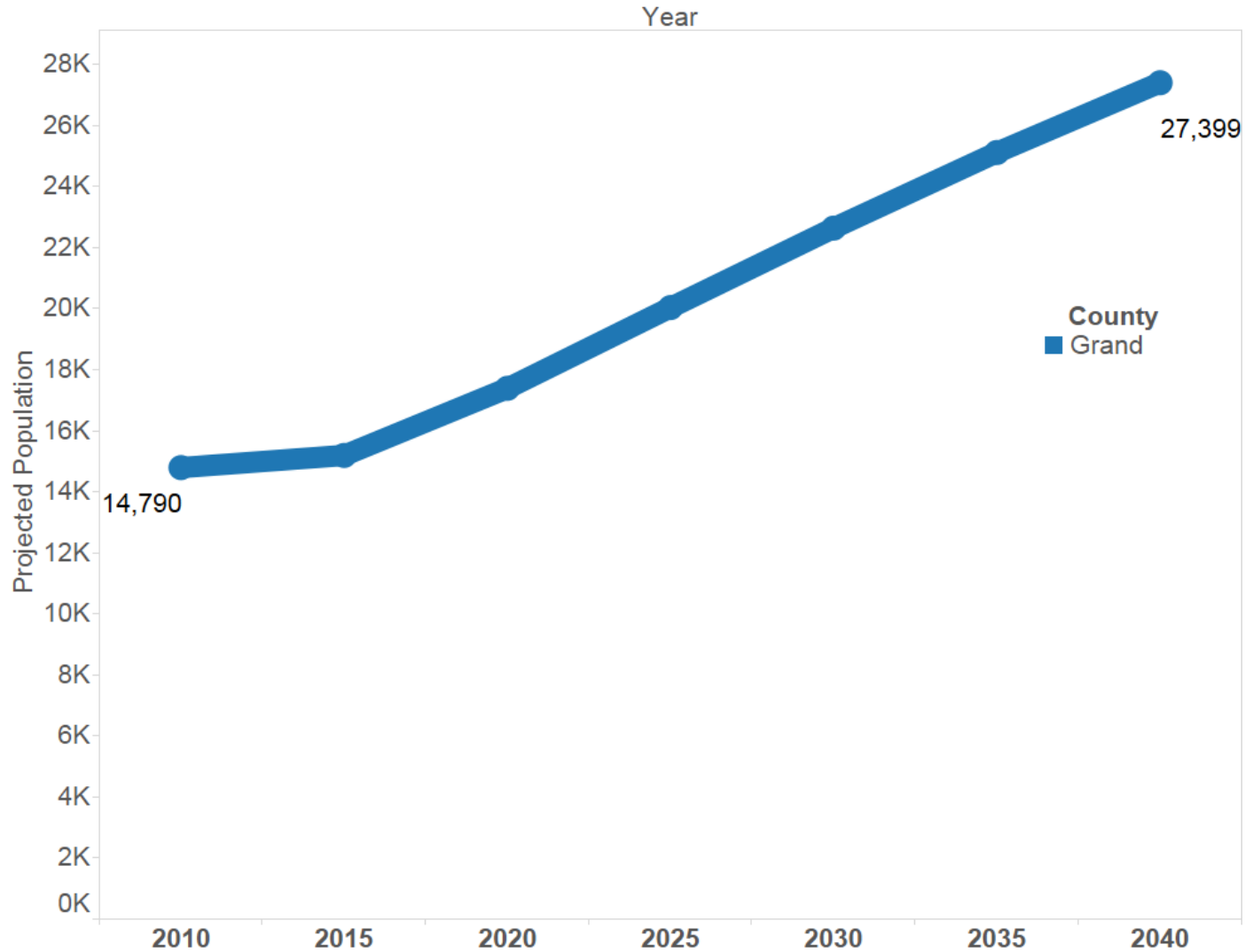
Grand County Population Growth



Source: CO Department of Local Affairs, US Census Bureau



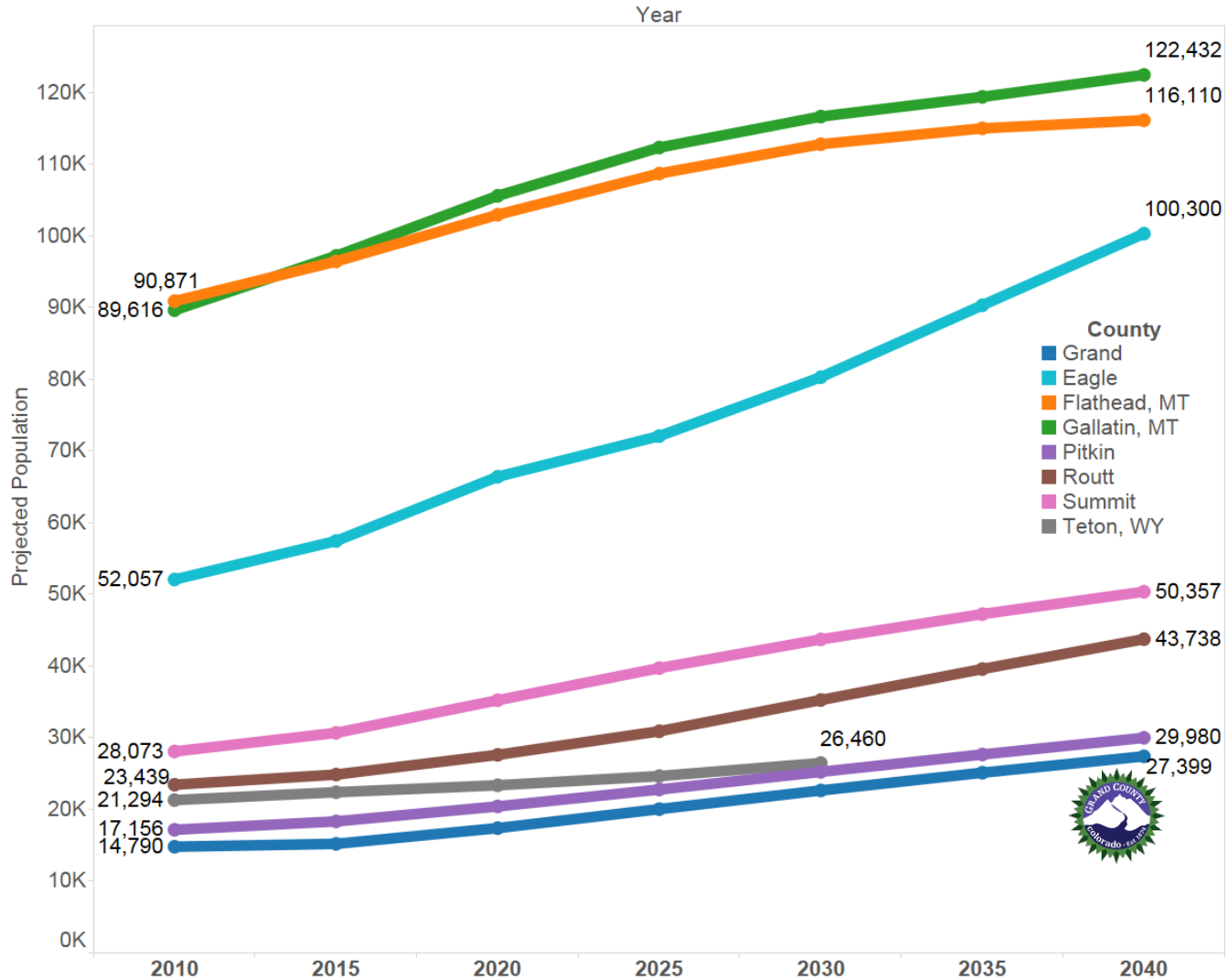
Grand County Population Projections



Source: CO State Demographer, WY Department of Administration & Information, MT Department of Commerce



Population Projections – by County

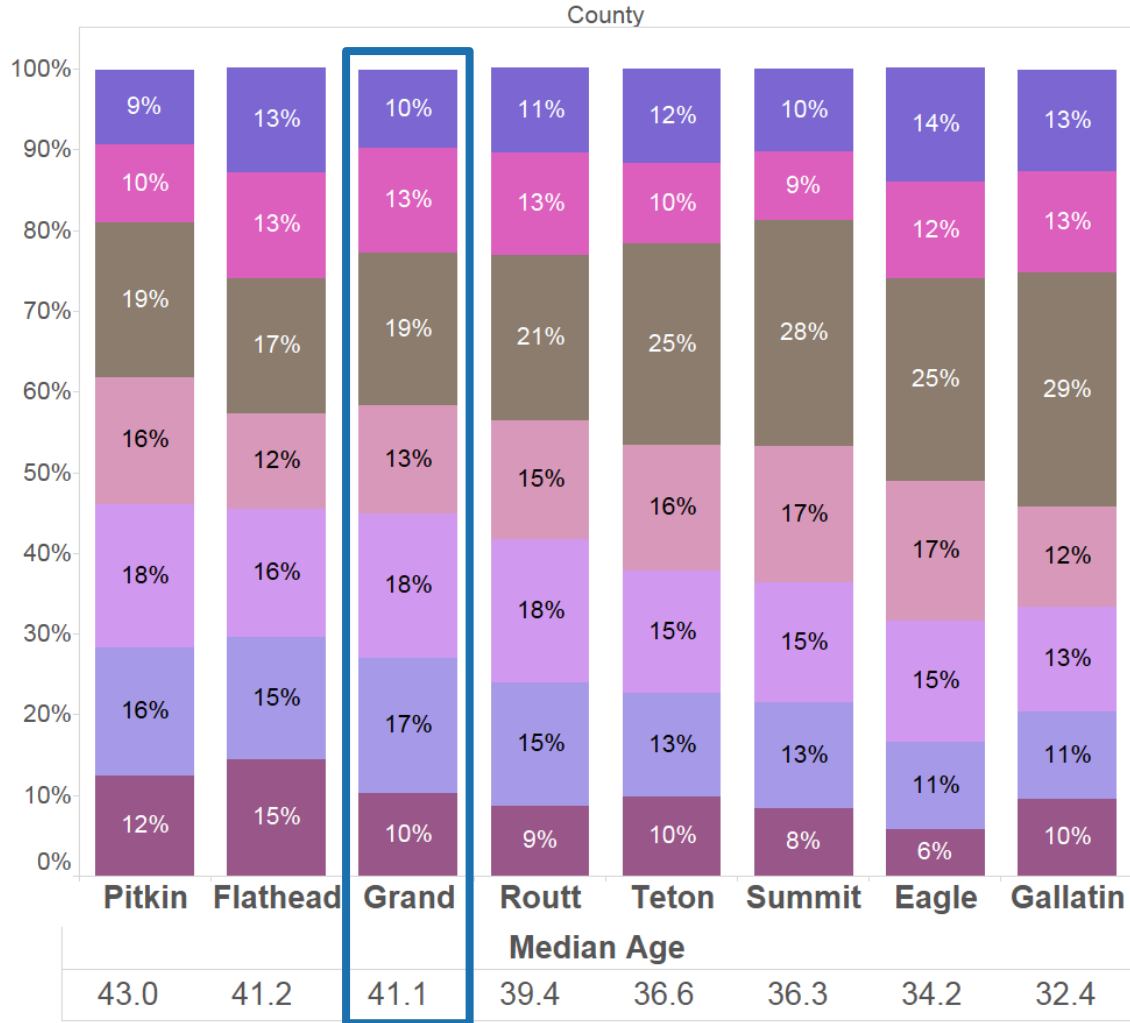


Source: CO State Demographer, WY Department of Administration & Information, MT Department of Commerce



Resident Age – by County, 2012

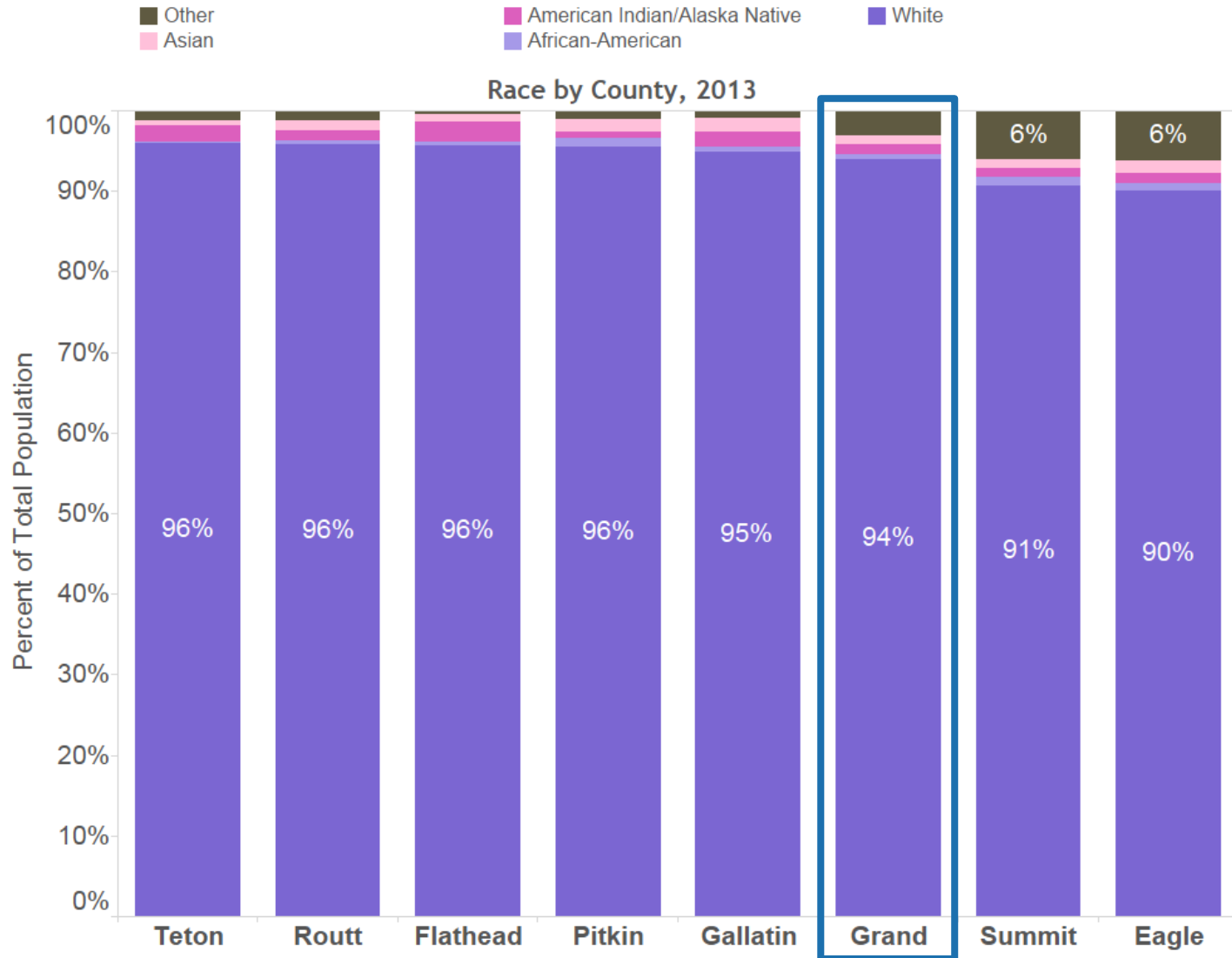
■ Under 10 years
 ■ 20 - 34 years
 ■ 45 - 54 years
 ■ 65 years and over
■ 10 - 19 years
 ■ 35 - 44 years
 ■ 55 - 64 years



Source: US Census Bureau, 2012 American Community Survey 5-year estimates



Resident Race – by County, 2012

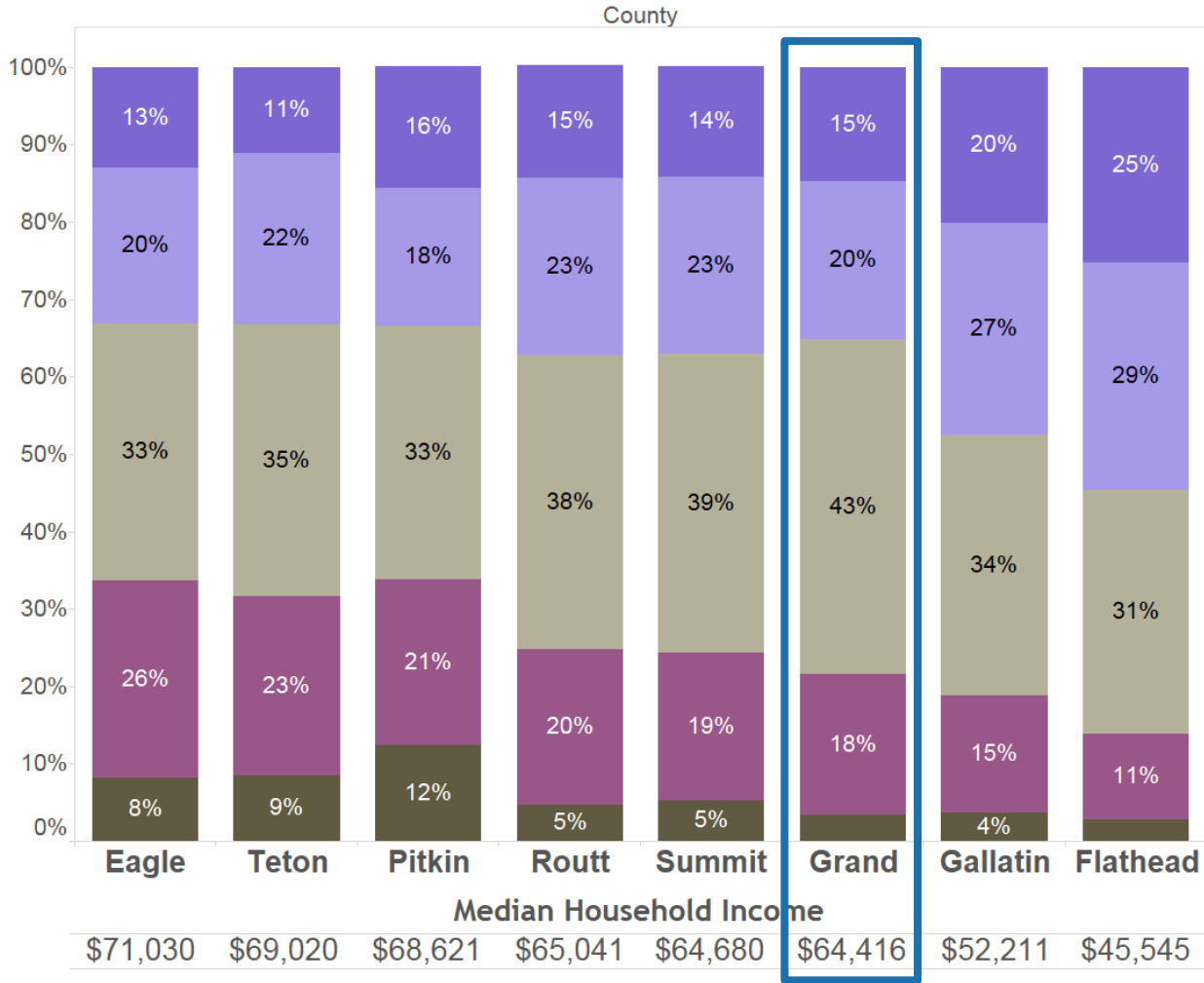


Source: US Census Bureau, 2012 American Community Survey 5-year estimates



Household Income – by County, 2012

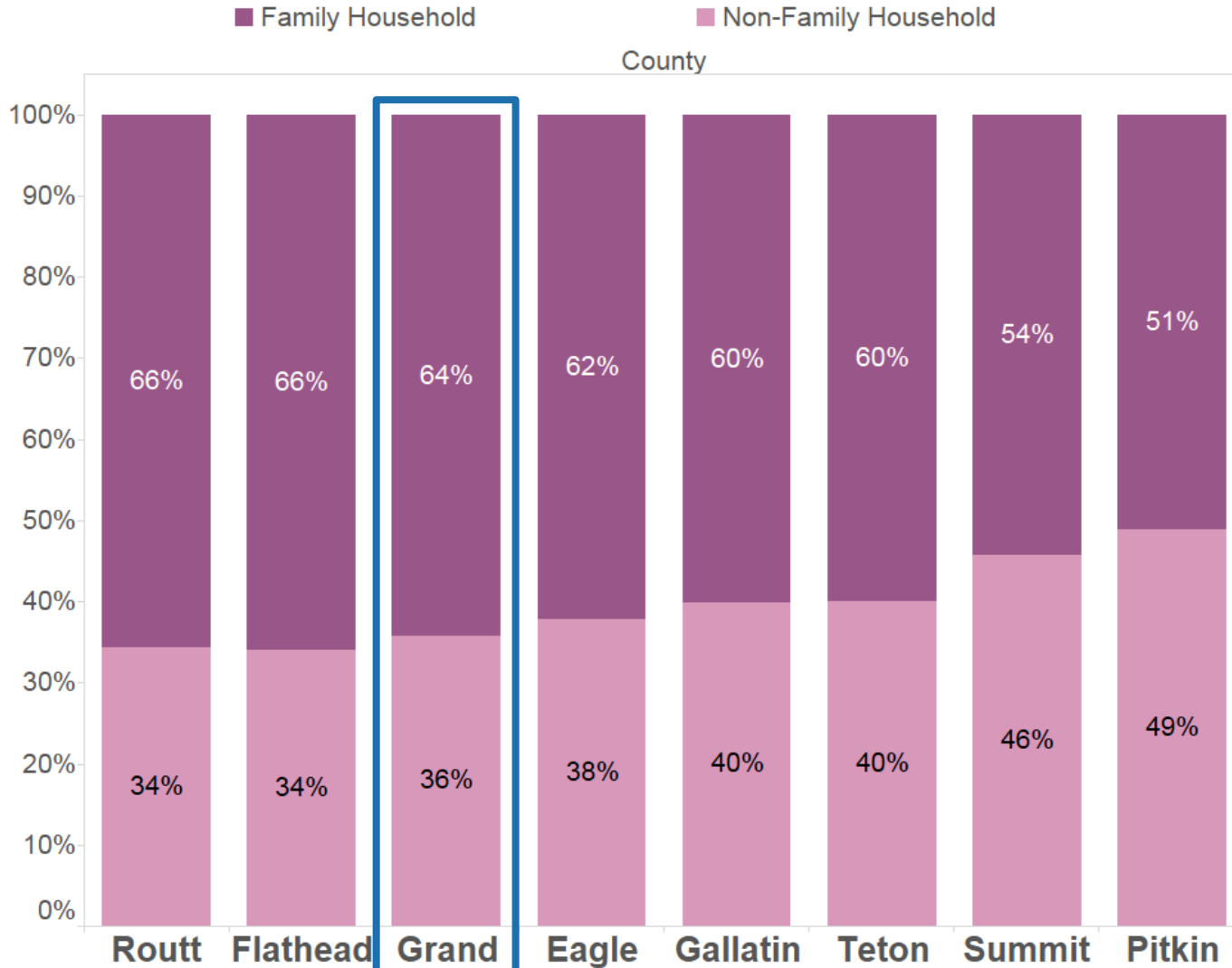
- Less than \$25,000
- \$25,000 - \$49,999
- \$50,000 - \$99,999
- \$100,000 - \$199,999
- \$200,000 or more



Source: US Census Bureau, 2012 American Community Survey 5-year estimates



Household Type – by County, 2012



Source: US Census Bureau, 2012 American Community 5-year estimates

Community Assets



Demographics



Education



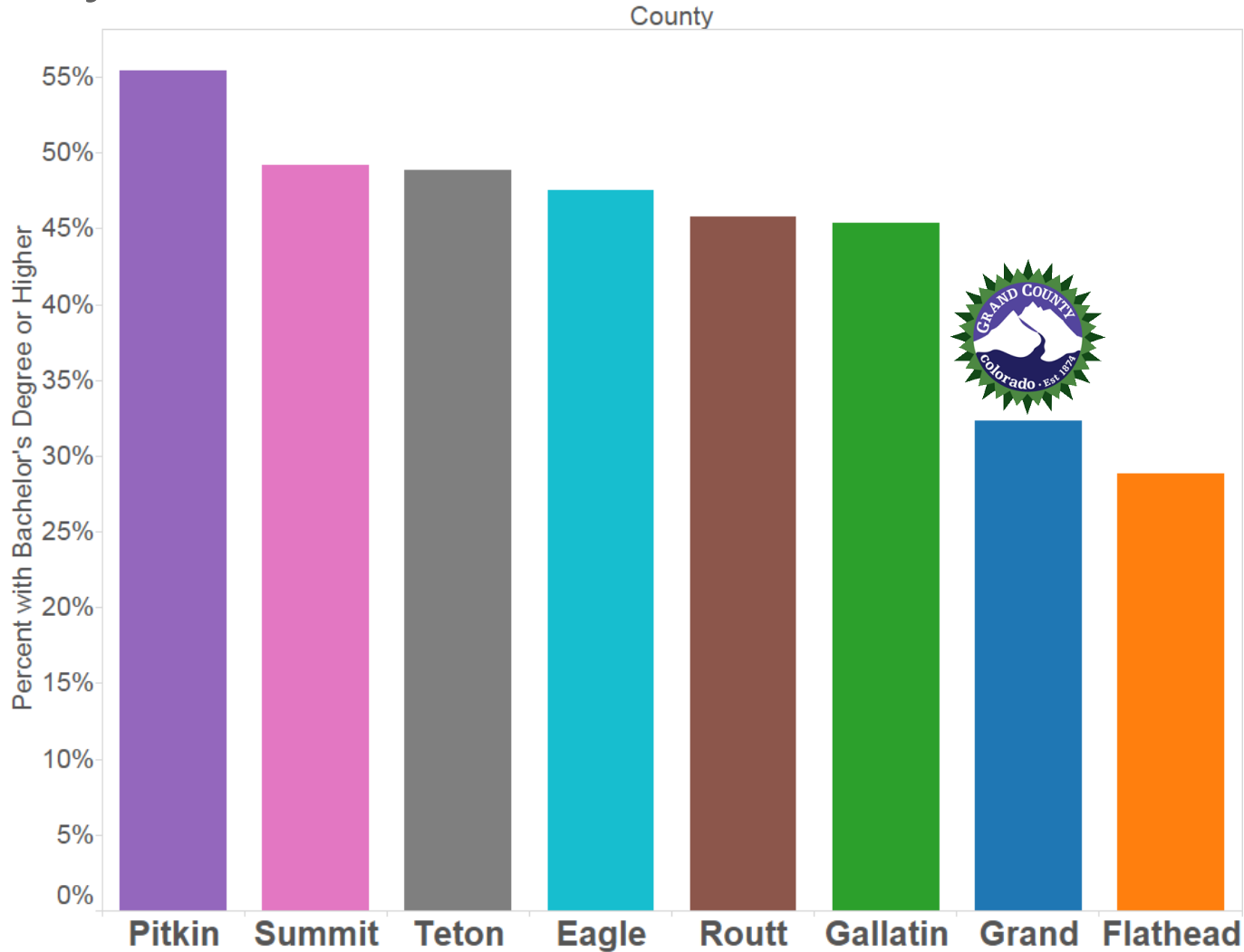
Public Assets



Housing Supply



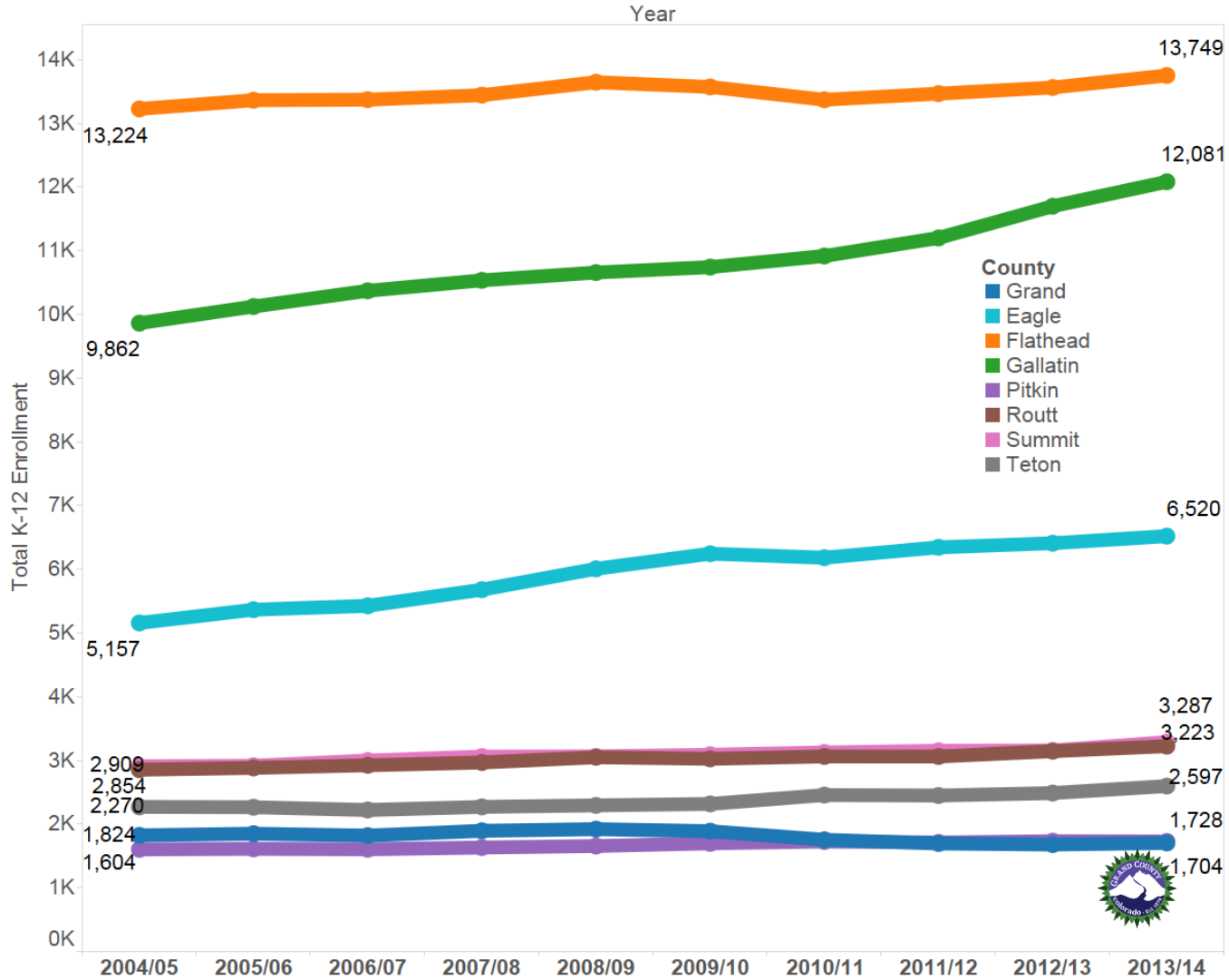
Percent of Population with College Degree – by County, 2012



Source: US Census Bureau, 2012 American Community 5-year estimates



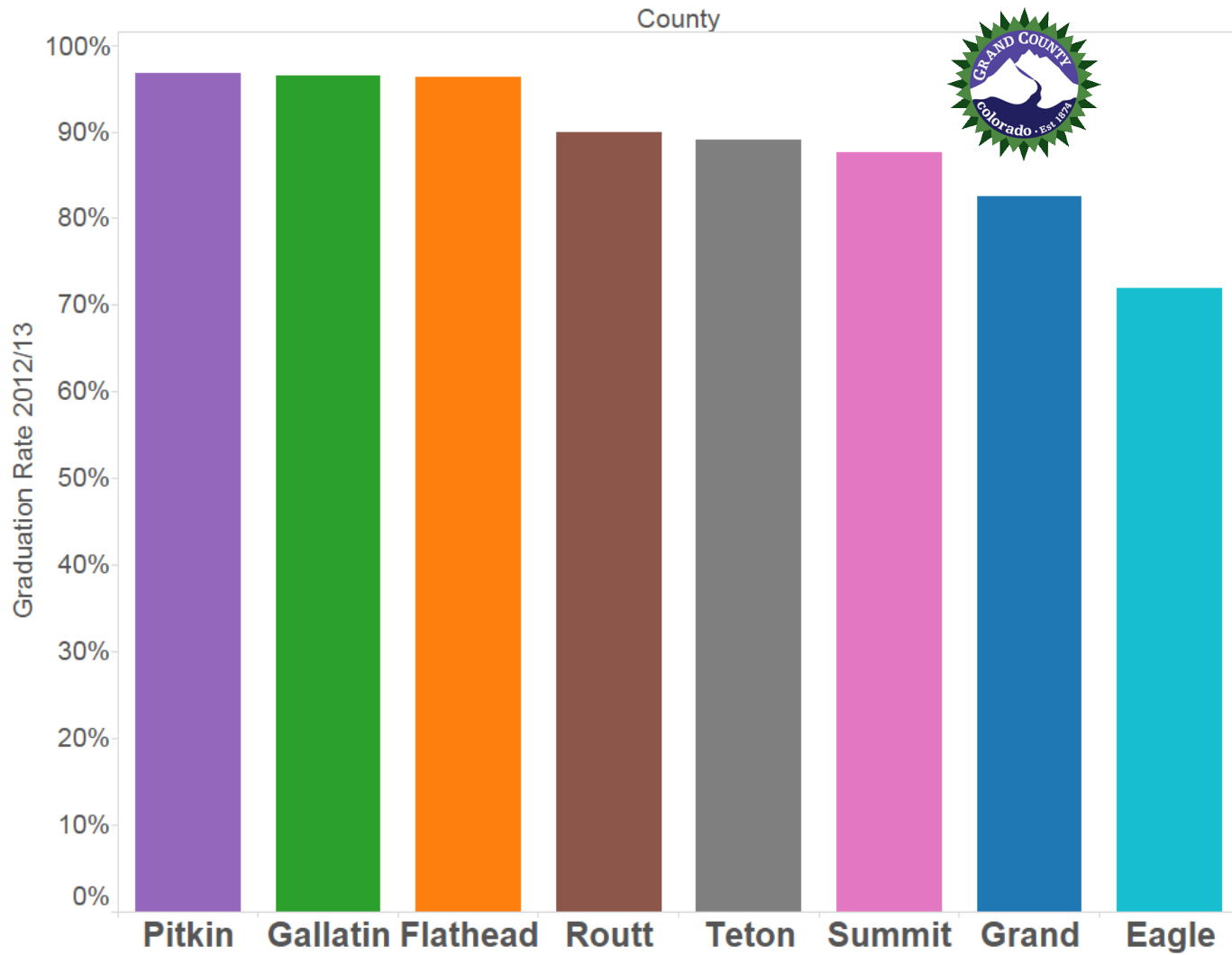
Fall K-12 Enrollments – by County



Source: CO Department of Education, WY Department of Education, MT Office of Public Instruction



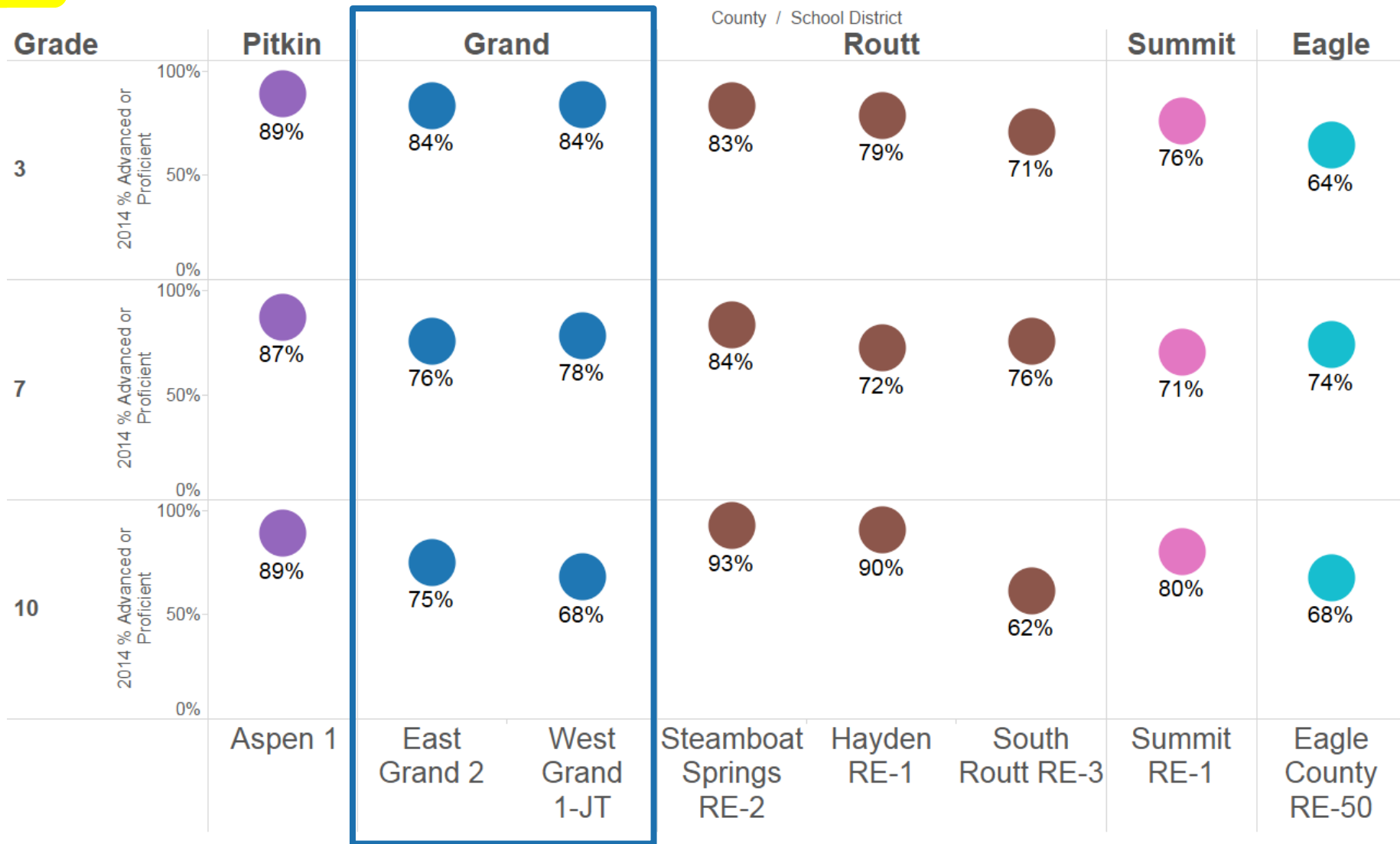
Graduation Rates – by County, 2012/13



Source: CO Department of Education, WY Department of Education, MT Office of Public Instruction



2014 TCAP Test Scores – by School District



Source: CO Department of Education

Community Assets



Demographics



Education



Public Assets



Housing Supply



Role of Physical Assets in Economic Development

- Capacity for growth:
 - Visitors, residents businesses, organizations
 - Tracking level of service
- Attractiveness:
 - Enhance visitor experience and variety
 - Attract residents with amenities
 - Retain residents with lifestyle and core services



What is Included in the Physical Asset Inventory?

- Information gathered from local governments, rec districts, and state sources
- Core Infrastructure
- Recreation Assets
- Commercial Real Estate Assets
- Schools



Grand County Parks & Recreation Facilities

Type of Facility	Number of Facilities
Baseball/Softball Fields	15
Picnic Grounds	14
Play Ground	14
Tennis Courts	13
Boat Ramp	12
Multi-Purpose/Open Turf	11
Outdoor Multi-Use Court	8
Indoor Gym	6
Volleyball	5
Bandshell/Stage	4
Skate Park	4
Soccer Fields	4
Climbing Wall	2
Club House	2
Community Garden	2
Disc Golf	2
Fishing Pond/Pier	2
Football Field	2
Golf Course	2
Ice Rink	2
Nordic Skiing Area	2
Track	2
Aquatics Center/Swimming Pool	1
Commercial Kitchen	1
Fitness Gym	1
Gymnastics Studio	1
Indoor Soccer Field	1

Source: Town of Winter Park, Town of Fraser, Town of Granby, Town of Grand Lake, Town of Hot Sulphur Springs, Town of Kremmling, East Grand School District, West Grand School District, Fraser Valley Metropolitan Recreation District, Grand Lake Metro District.



Other Recreation Amenities

- Four Golf Courses Totaling 81 Holes
- Colorado River Gorge
- Rocky Mountain National Park
- Seven Large Reservoirs/Lakes
- Winter Park Resort
- Snow Mountain Ranch (YMCA)
- Granby Ranch
- Devils Thumb Resort
- Two Scenic Byways
- Five Museums
- Two Rodeo Grounds
- Three Established Tubing Hills



Trails

- Over 77 distinct trails
- Includes over 450 miles of trails
- Ranging from easy to very difficult and inclusive of ADA accessible trails



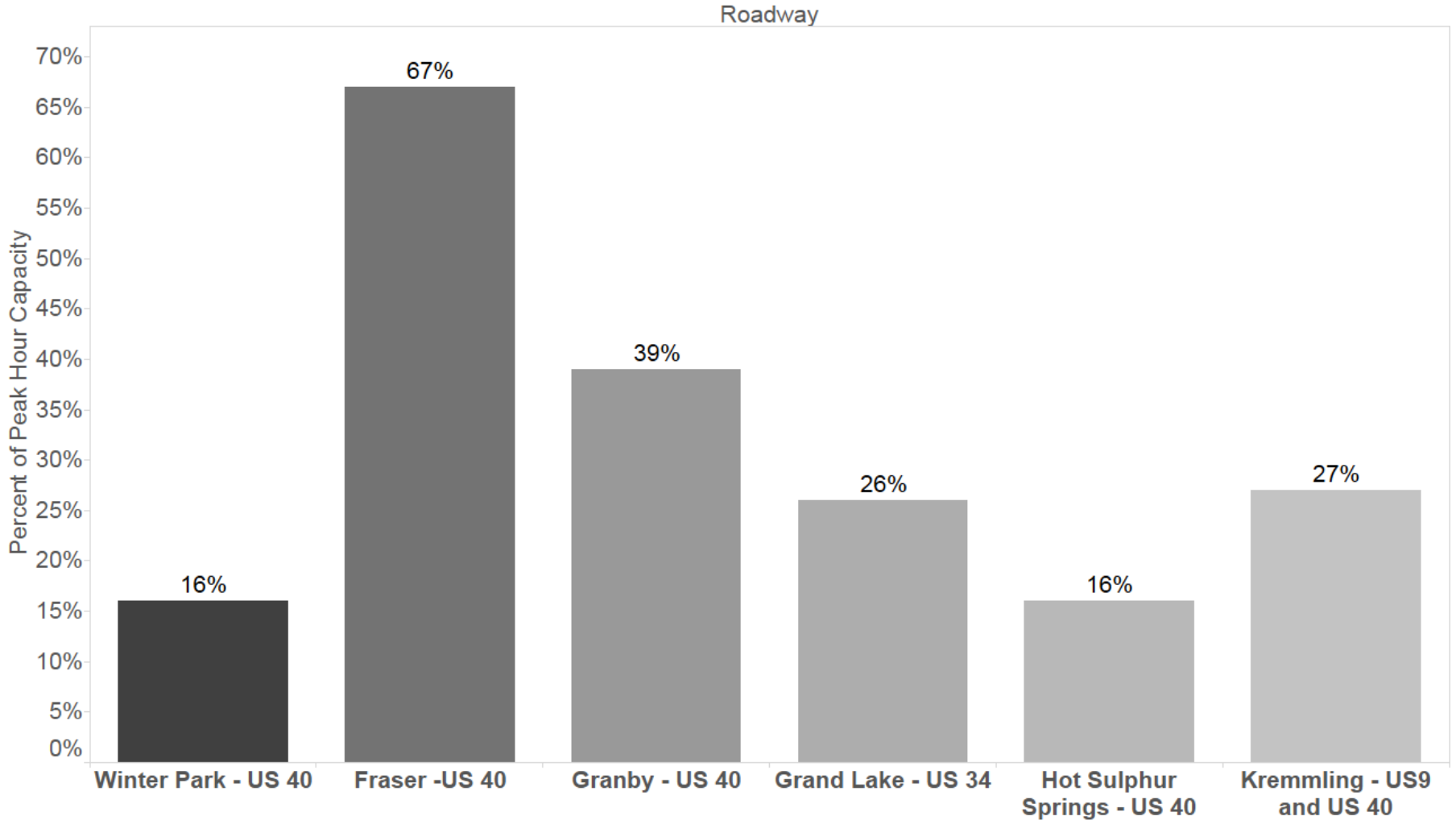
Traffic Volumes and Capacity

Roadway	ADT	Peak Hour Trips
Winter Park - US 40	4,700 - 9,700	560 - 930
Fraser -US 40	9,900 -13,000	1,200 - 1,600
Granby - US 40	4,500 - 8,900	550 - 1,100
Grand Lake - US 34	4,800	580
Hot Sulphur Springs - US 40	3,000	360
Kremmling - US9 and US 40	3,600 - 5,000	430 - 600

Source: CDOT OTIS



Peak Hour Percent of Total Traffic Capacity



Source: CDOT OTIS



Berthoud Pass Traffic Comparison

Roadway	ADT
U.S. 40 (Berthoud Pass, Clear Creek County)	6,100
U.S. 40 (Berthoud Pass, Winter Park)	4,700 - 6,400
Frisco-Breckenridge (SH 9)	18,000 - 21,000
Aspen (SH 82)	20,000 - 22,000
Eisenhower Tunnel (1-70)	28,000

Source: CDOT OTIS

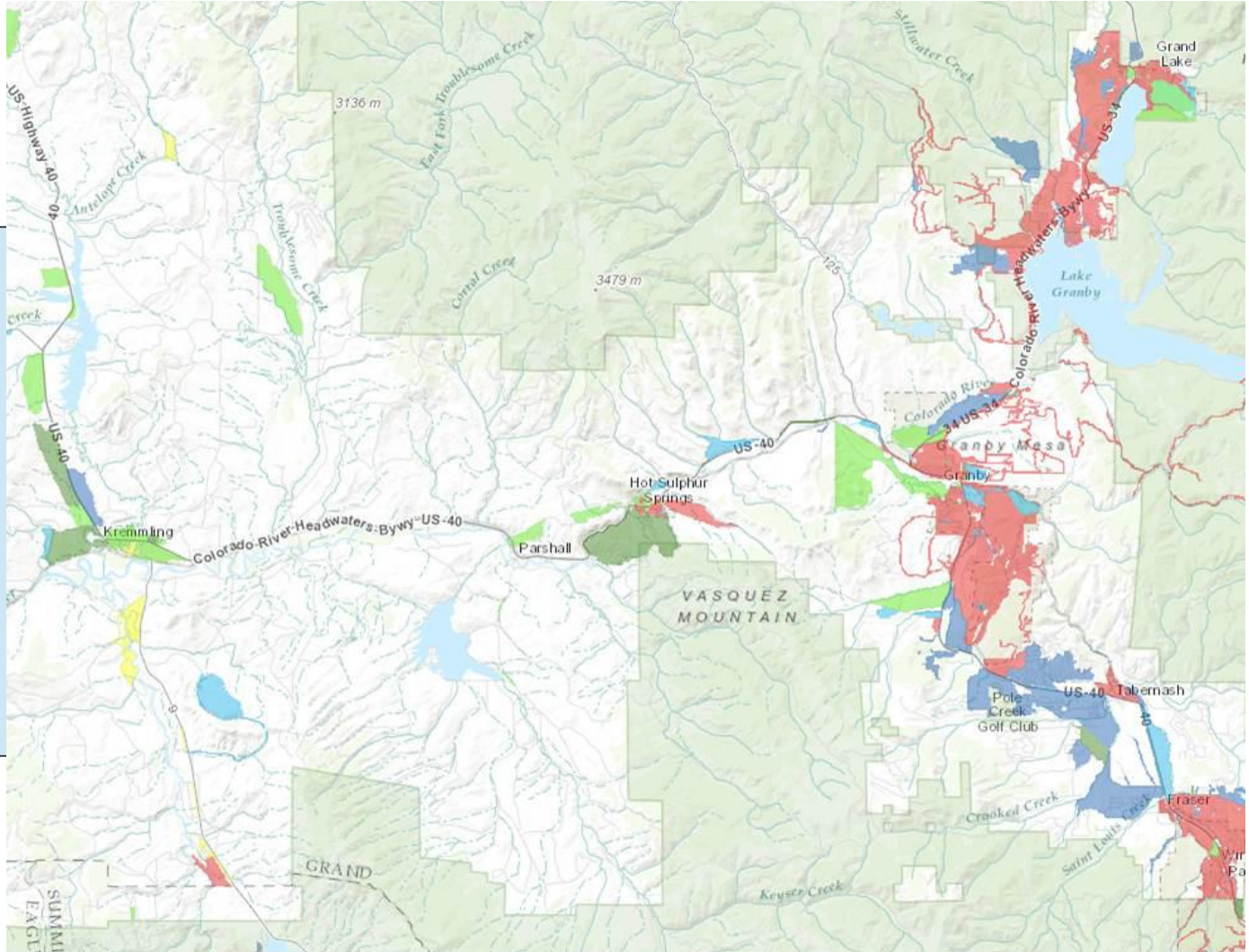
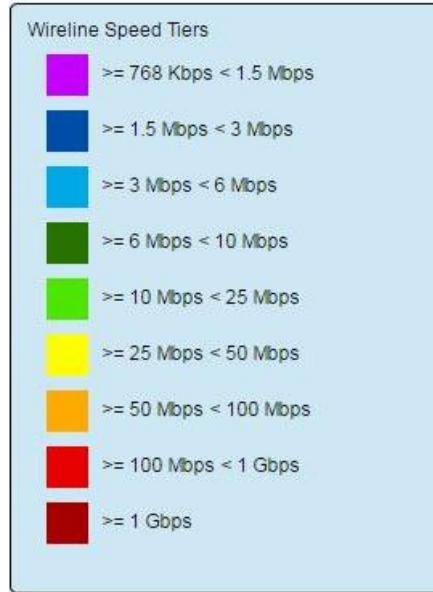


Communications Infrastructure – Broadband

- 2012 average speeds Grand County – 8.0 (Mbps) Download, 1.93 (Mbps) Upload
- Average speeds for other counties in Northwest Colorado – 14.6 (Mbps) Download, 2.5 (Mbps) Upload



Communications Infrastructure – Wireline Distribution












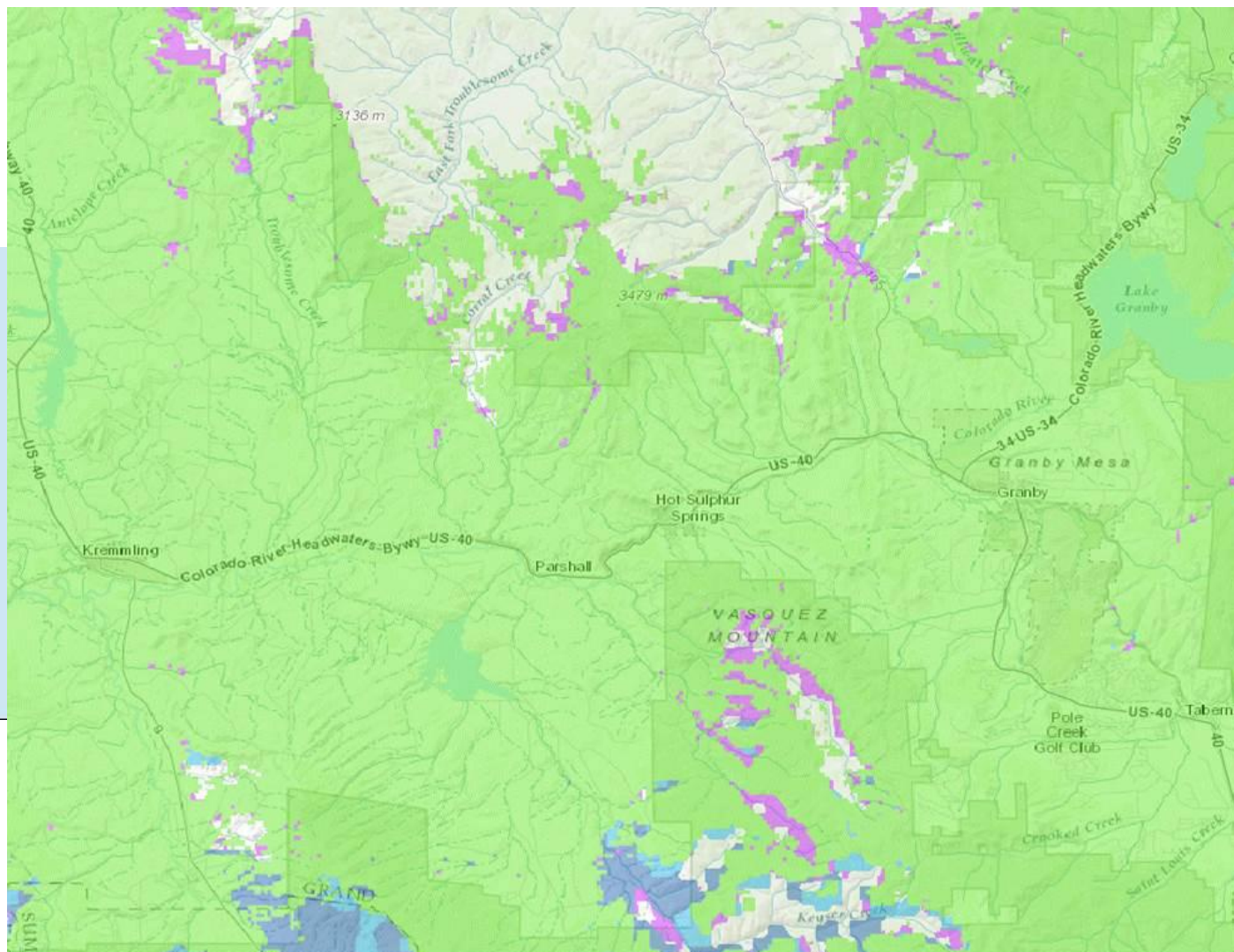
Source: CO Office of Information Technology, CO Broadband Mapping Application



Communications Infrastructure – Mobile Distribution

Mobile Speed Tiers

-  $\geq 768 \text{ Kbps} < 1.5 \text{ Mbps}$
-  $\geq 1.5 \text{ Mbps} < 3 \text{ Mbps}$
-  $\geq 3 \text{ Mbps} < 6 \text{ Mbps}$
-  $\geq 6 \text{ Mbps} < 10 \text{ Mbps}$
-  $\geq 10 \text{ Mbps} < 25 \text{ Mbps}$
-  $\geq 25 \text{ Mbps} < 50 \text{ Mbps}$
-  $\geq 50 \text{ Mbps} < 100 \text{ Mbps}$
-  $\geq 100 \text{ Mbps} < 1 \text{ Gbps}$
-  $\geq 1 \text{ Gbps}$



Source: CO Office of Information Technology, CO Broadband Mapping Application



Communications Infrastructure – Broadband

Barriers to progress

- Rough terrain
- Sparse population density
- Weak state and federal investment
- Changing nature of technology



Public Lands

Land Status

Acres

BLM

143,813

Local Agency

18,385

National Park Service

96,467

Private

331,314

State Lands

36,324

US Forest Service

569,409

Total

1,195,713

Source: BLM Geospatial Data Center



Public School Inventory

West Grand School District

- West Grand Elementary School
- West Grand Middle School
- West Grand High School

East Grand School District

- Fraser Valley Elementary
- Granby Elementary School
- East Grand Middle School
- Middle Park High School



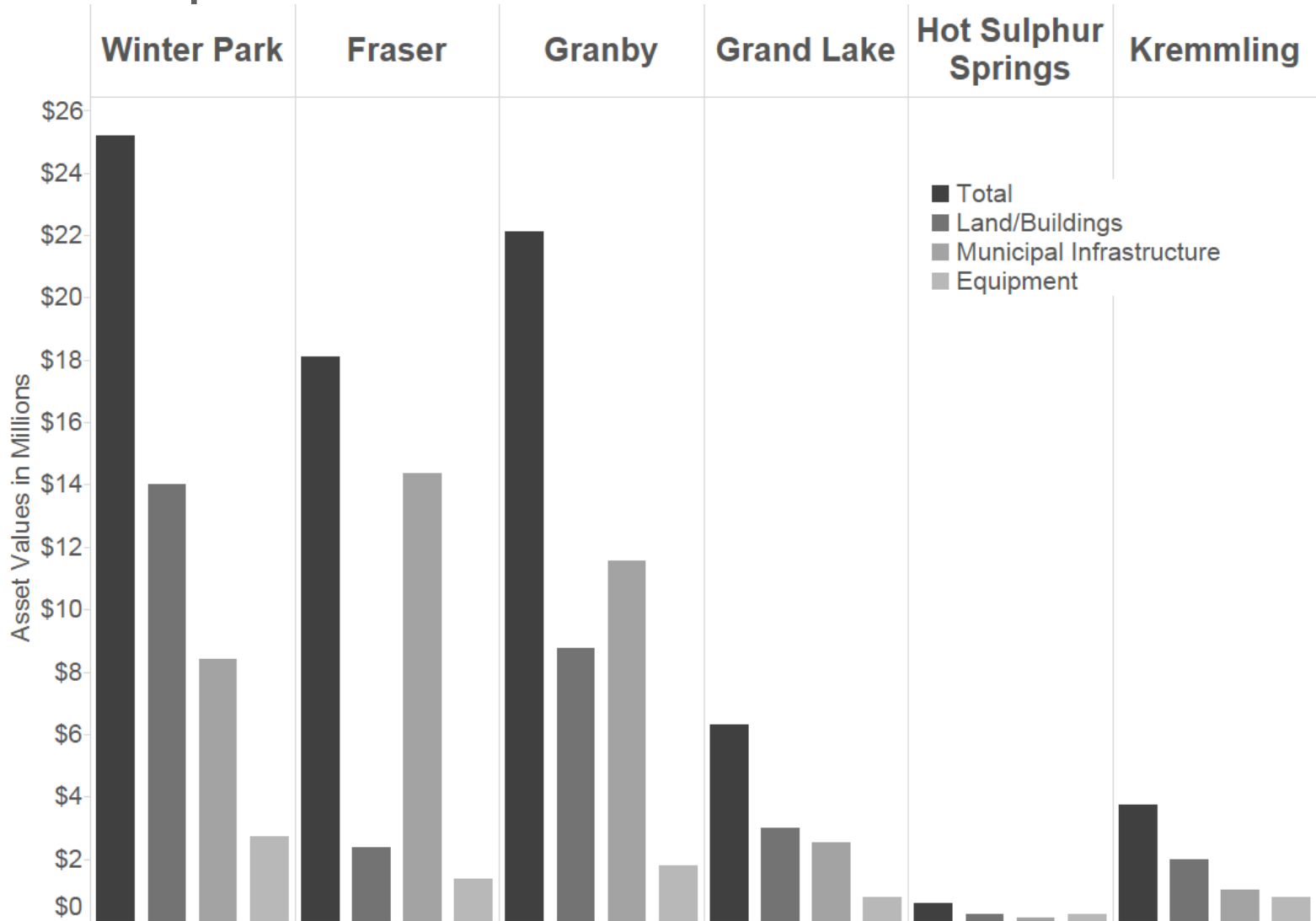
Non-Residential Inventory

Type	Winter Park	Fraser	Granby	Grand Lake	Hot Sulphur Springs	Kremmling	Other Areas
General Commercial	352,582	74,371	88,926	149,026	5,936	185,019	209,821
Lodging	453,143	36,325	57,233	216,745	14,512	96,326	1,019,449
Merchandising	15,008	137,229	175,713	94,810	4,536	100,016	78,473
Office	23,672	16,076	62,639	6,720	10,738	50,230	31,480
Warehouse	1,920	1,408	80,394	0	8,451	20,852	200,357
Total	846,325	265,409	464,905	467,301	44,173	452,443	1,539,580

Source: Grand County Assessor



Municipal Asset Value

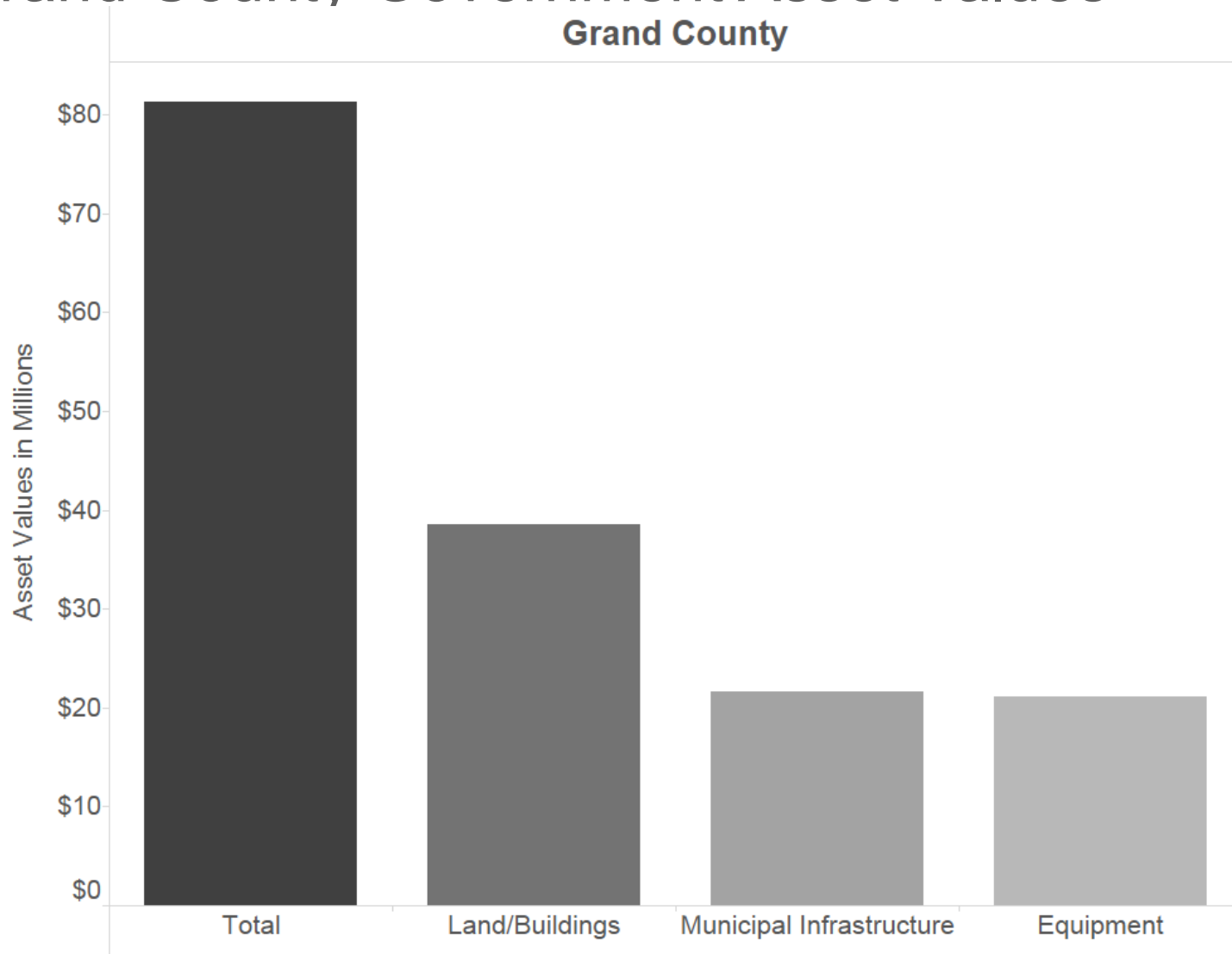


Source: 2013 Audited Financial Statements



Grand County Government Asset Values

Grand County



Source: 2013 Audited Financial Statements

Community Assets



Demographics



Education



Public Assets

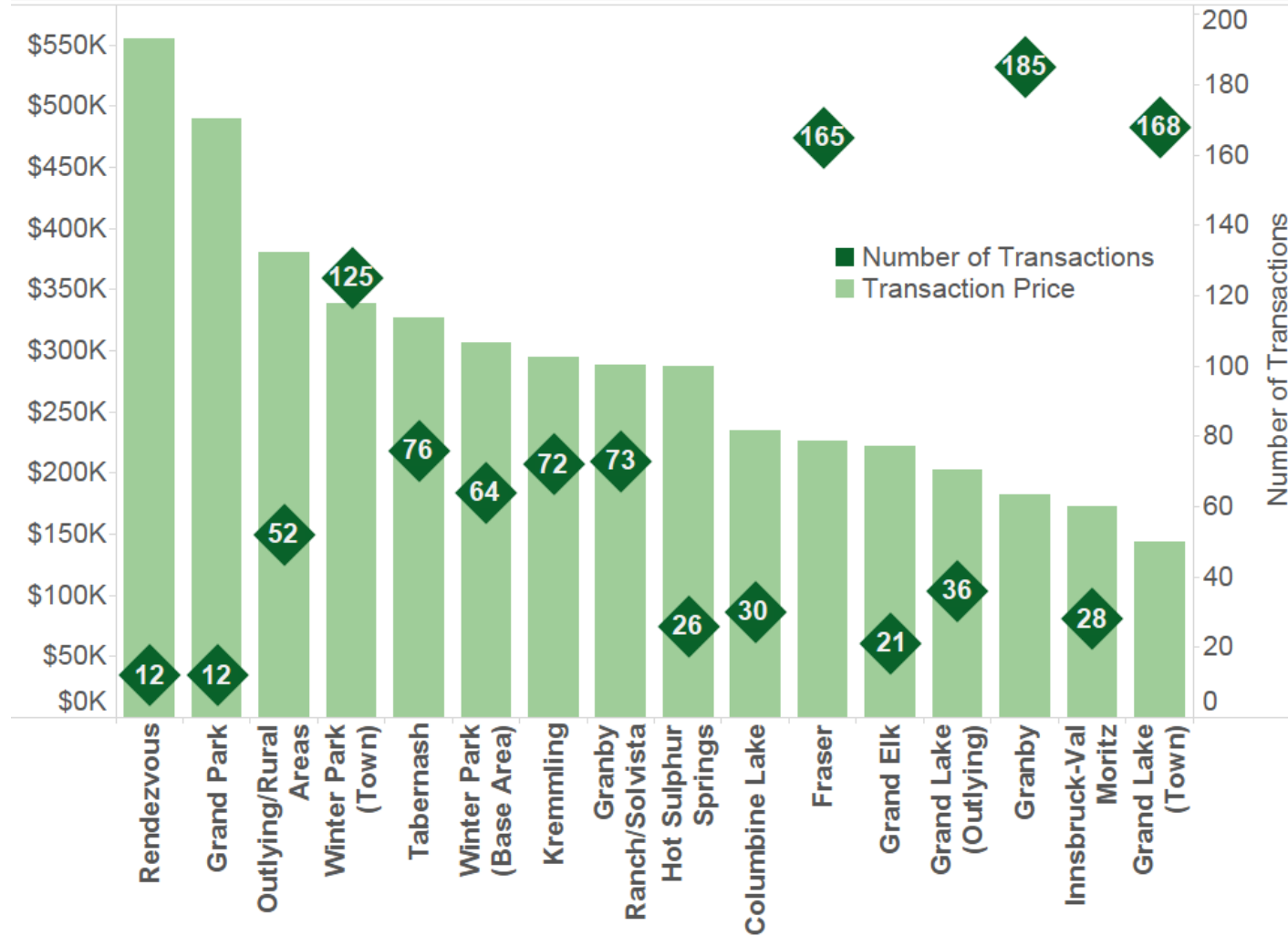


Housing Supply



Average Real Estate Transactions

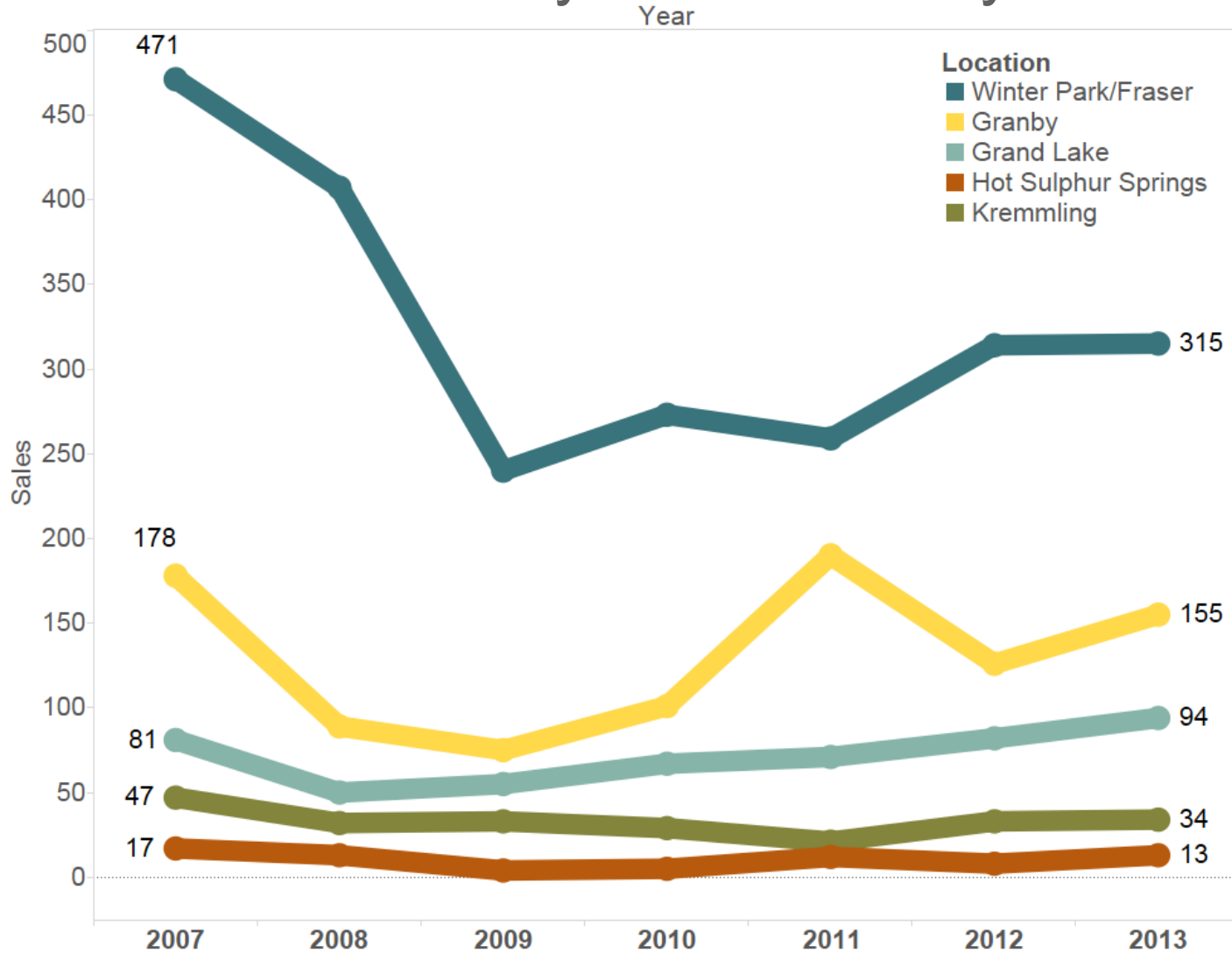
2013 Average Real Estate Transaction Price and Number of Annual Transactions by Grand County Location



Source: Land Title Grand Market Analysis 2013



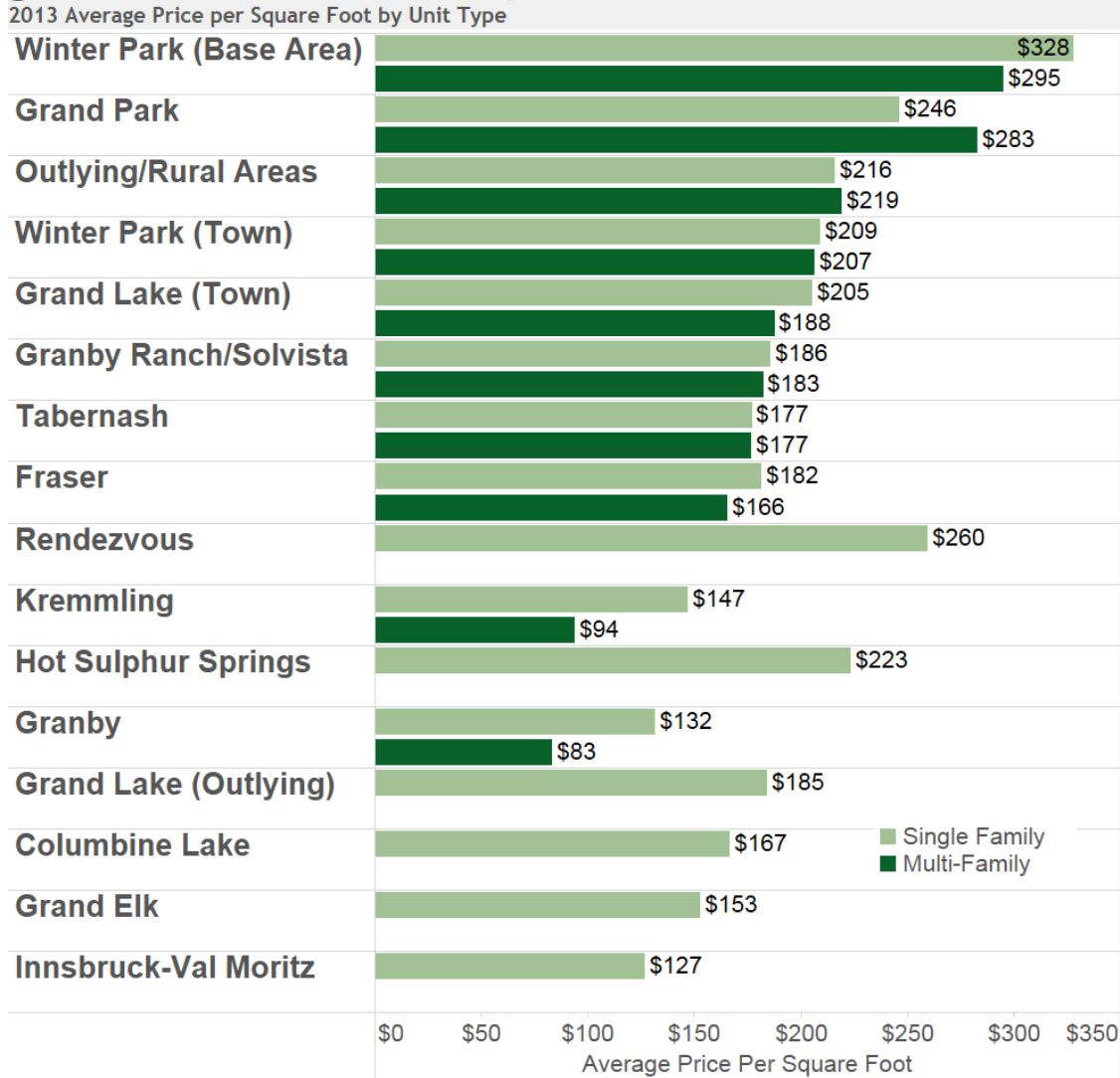
MLS Historic Sales by Grand County Location



Source: MLS



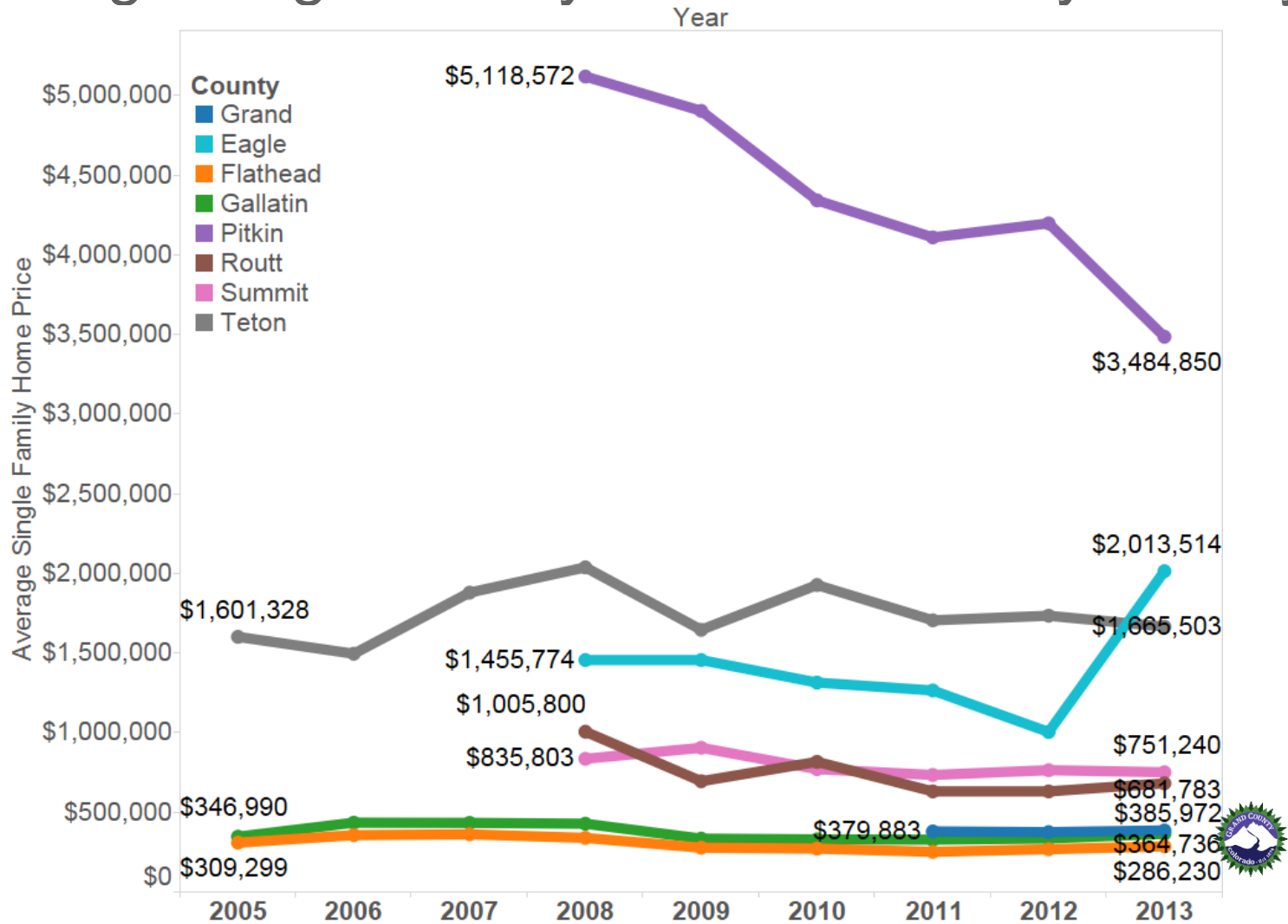
Average Price Per Square Foot



Source: Land Title Grand County Market Analysis 2013



Average Single-Family Home Price – by County



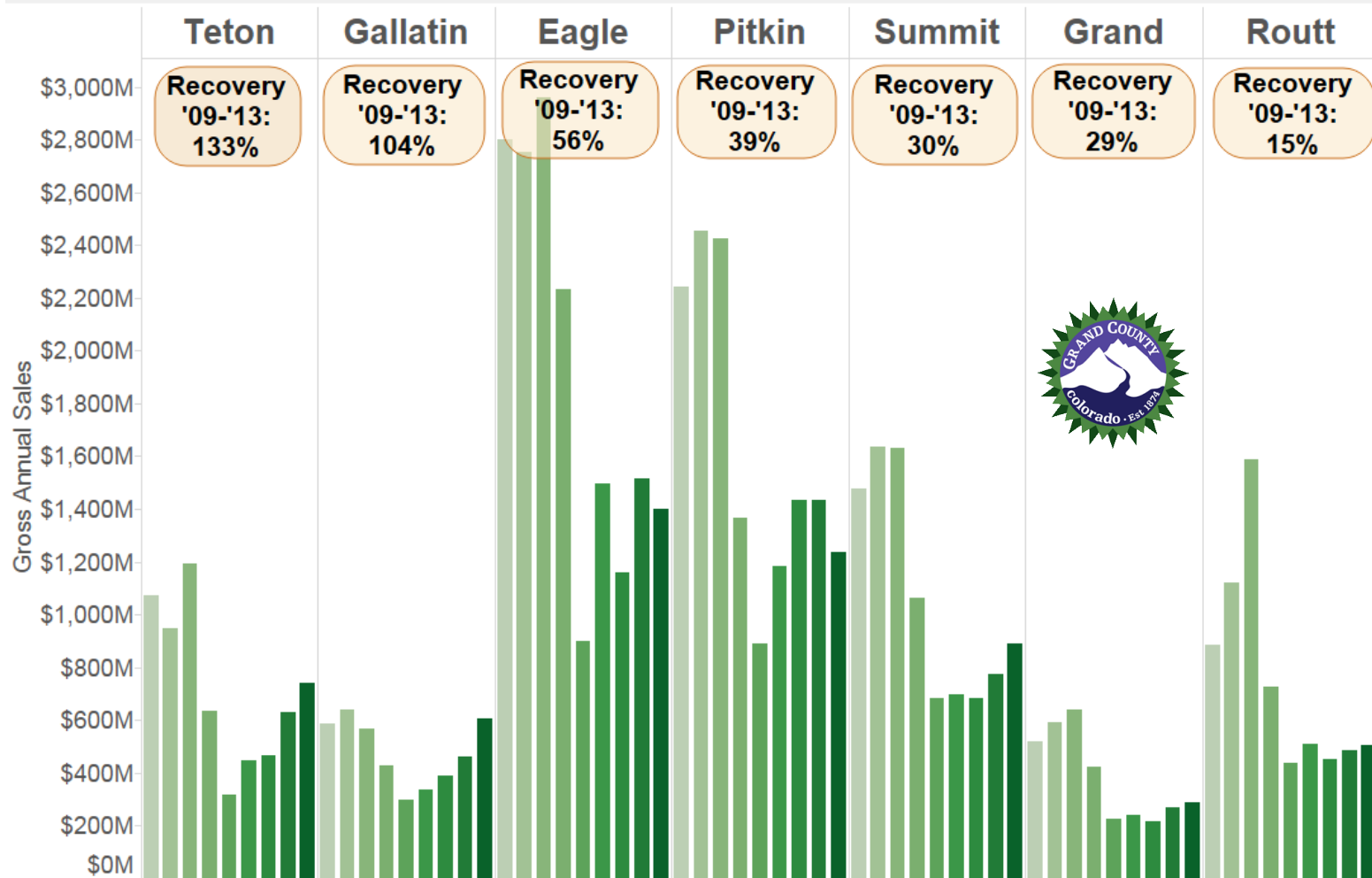
Source: Land Title Market Analysis Data (CO Counties), Rocky Mountain Appraisals Market Update (Teton, WY), Kelley Appraisal Market Summary Data (Flathead, MT), Gallatin Association of Realtors/Southwest Montana MLS



Gross Real Estate Transaction Sales – by County

Gross Real Estate Transaction Sales, 2005-2013

2005 2006 2007 2008 2009 2010 2011 2012 2013



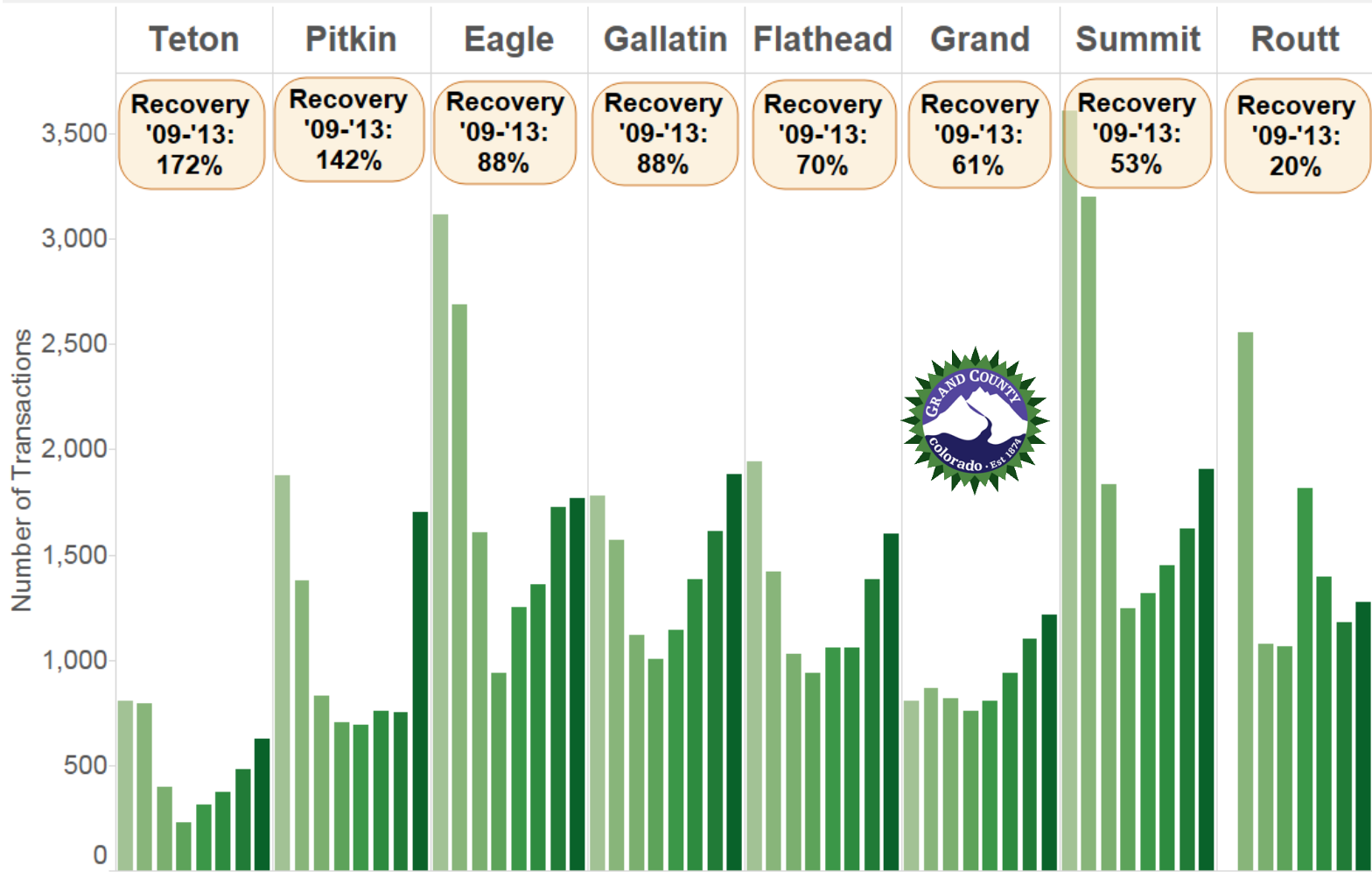
Source: Land Title CO Mountain Resorts Market Analysis, Grand County Assessor, Rocky Mountain Appraisals Teton County Market Report, Montana Land Realtors Flathead County Market Summary, Gallatin Board of Realtors Market Statistics



Average Real Estate Transactions – by County

Annual Real Estate Transactions by County, 2006-2013

2006 2007 2008 2009 2010 2011 2012 2013



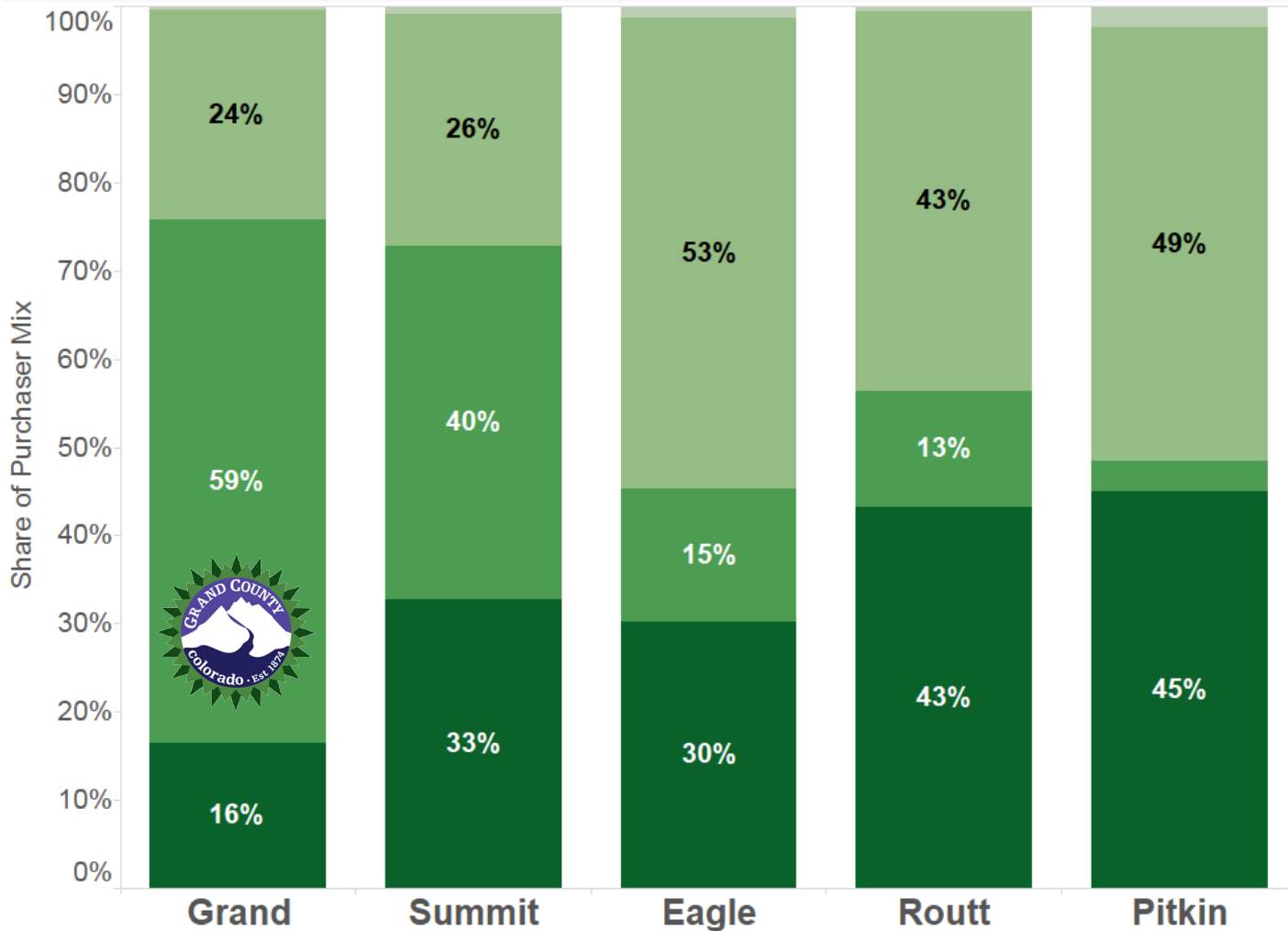
Source: Land Title CO Mountain Resorts Market Analysis, Grand County Assessor, Rocky Mountain Appraisals Teton County Market Report, Montana Land Realtors Flathead County Market Summary, Gallatin Board of Realtors Market Statistics



Purchaser Mix – by County

2013 Purchaser Profile by County

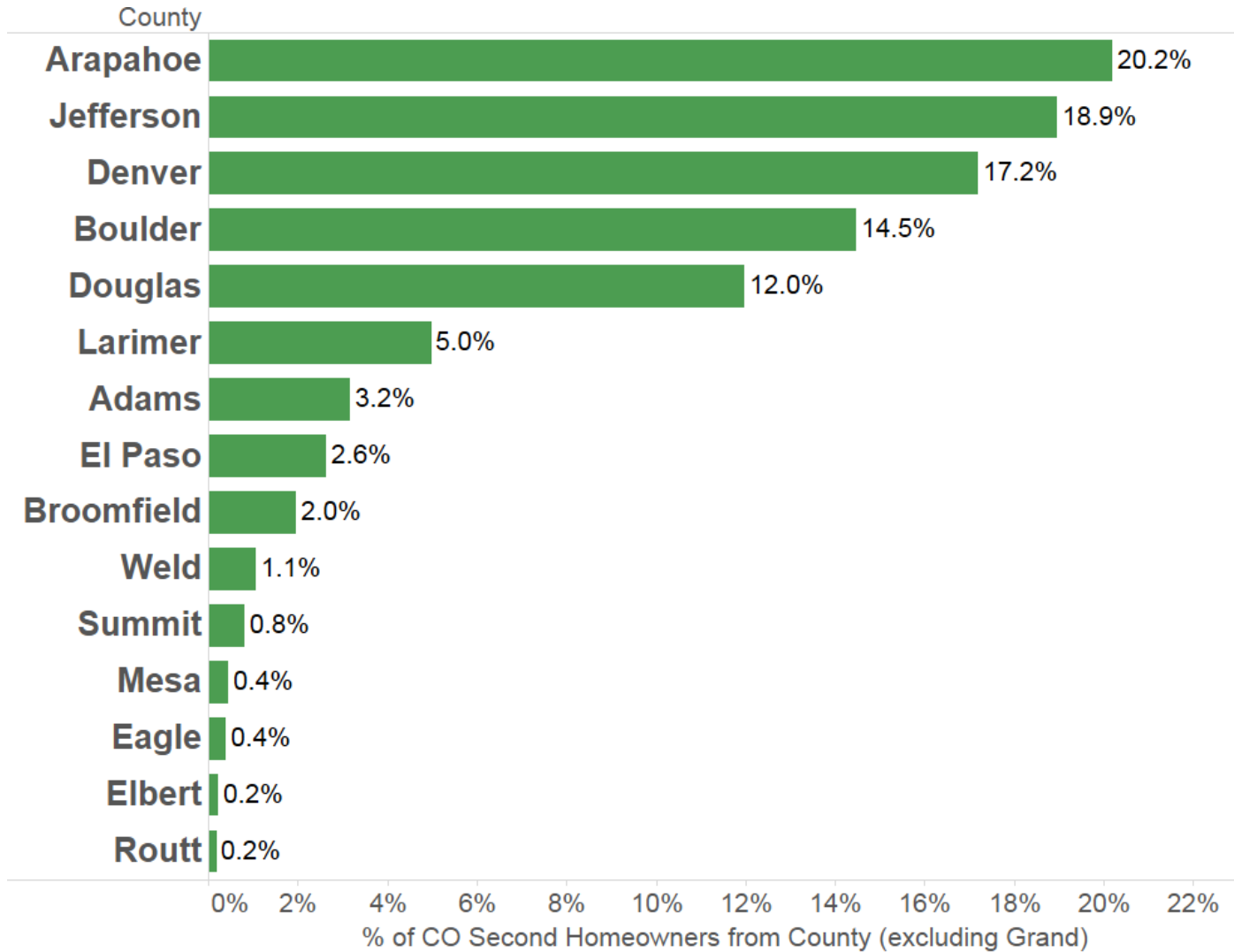
International Local Front Range Out of State



Source: Land Title CO Mountain Resorts Market Analysis



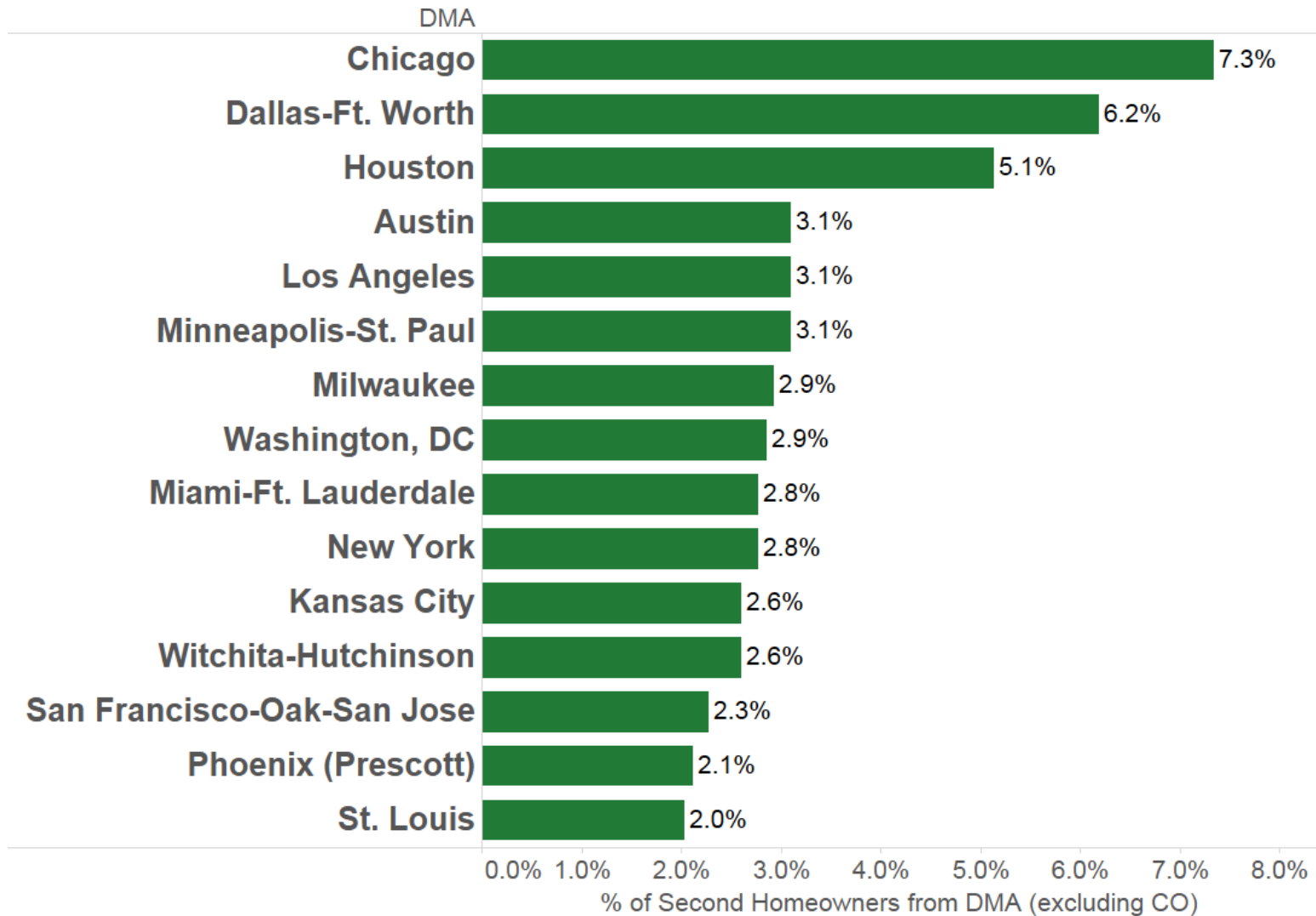
Grand County CO Second Homeowners



Source: Grand County Assessor



Grand County Out of State Second Homeowners



Source: Grand County Assessor

Economic Trends & Markets

Economic Trends & Markets



Economic Structure and Trends



Employment



Business Profile



Summer Visitor Profile

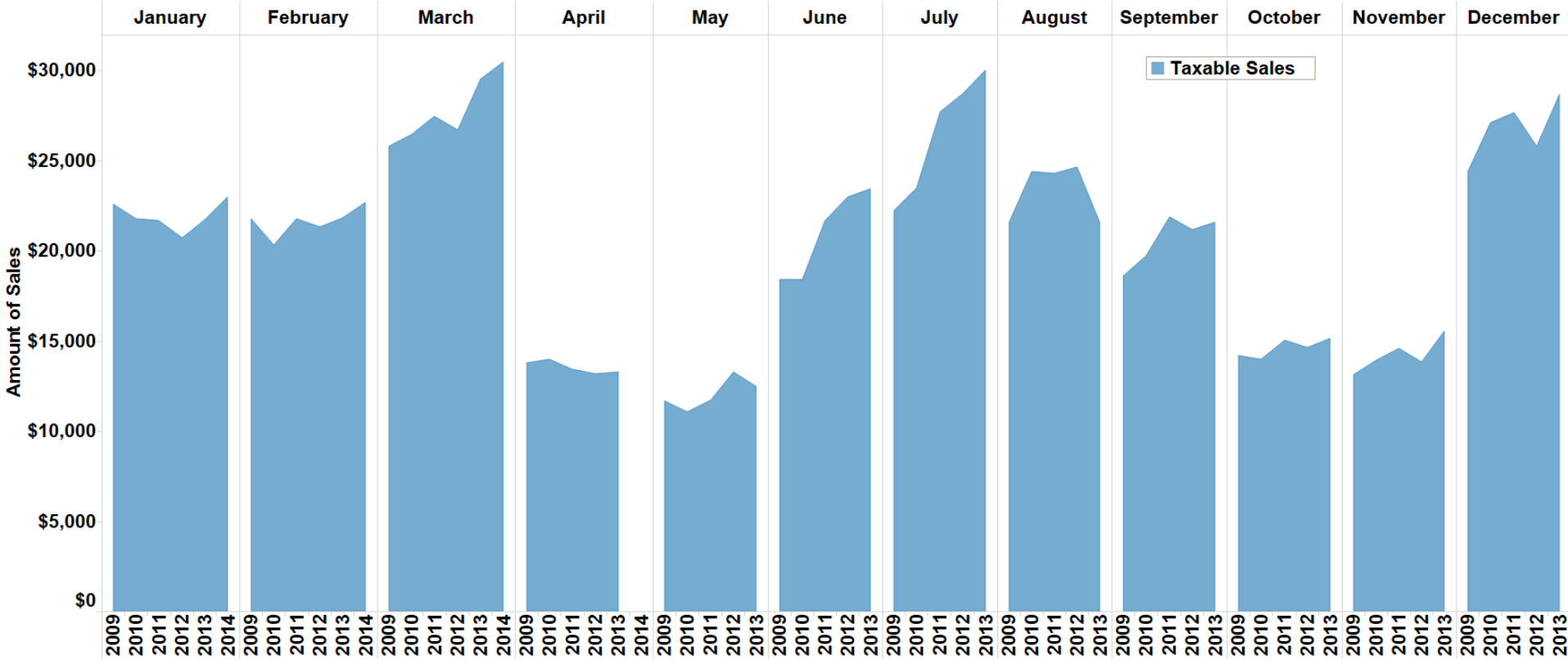


Resident Profile



Grand County Sales Tax Profile

Grand County Sales Tax Profile, 2009-2013

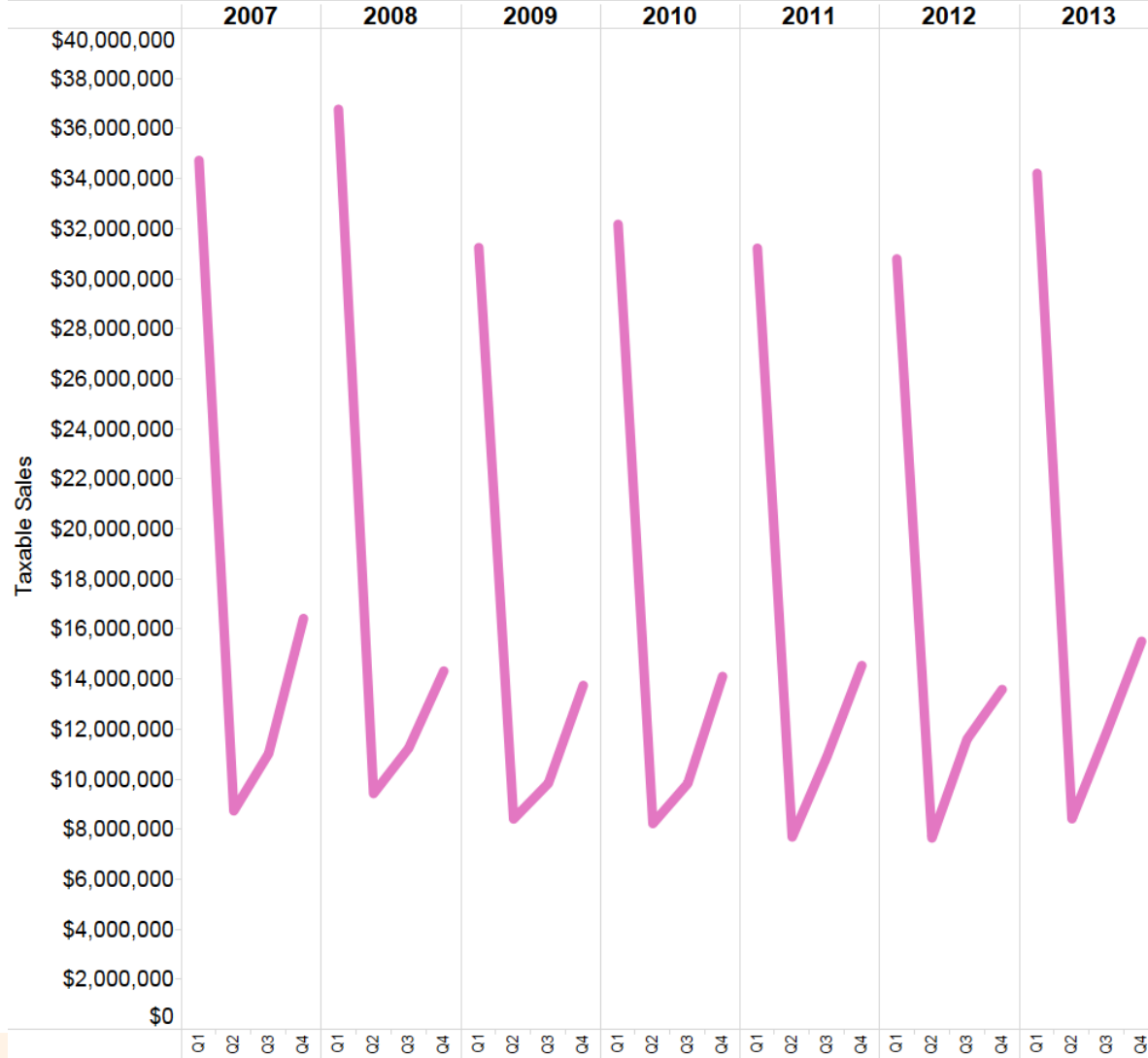


Source: CO Department of Revenue



Winter Park Taxable Sales

Quarterly Taxable Sales Winter Park, 2007-2013
Sorted by Average Quarterly Sales, High to Low

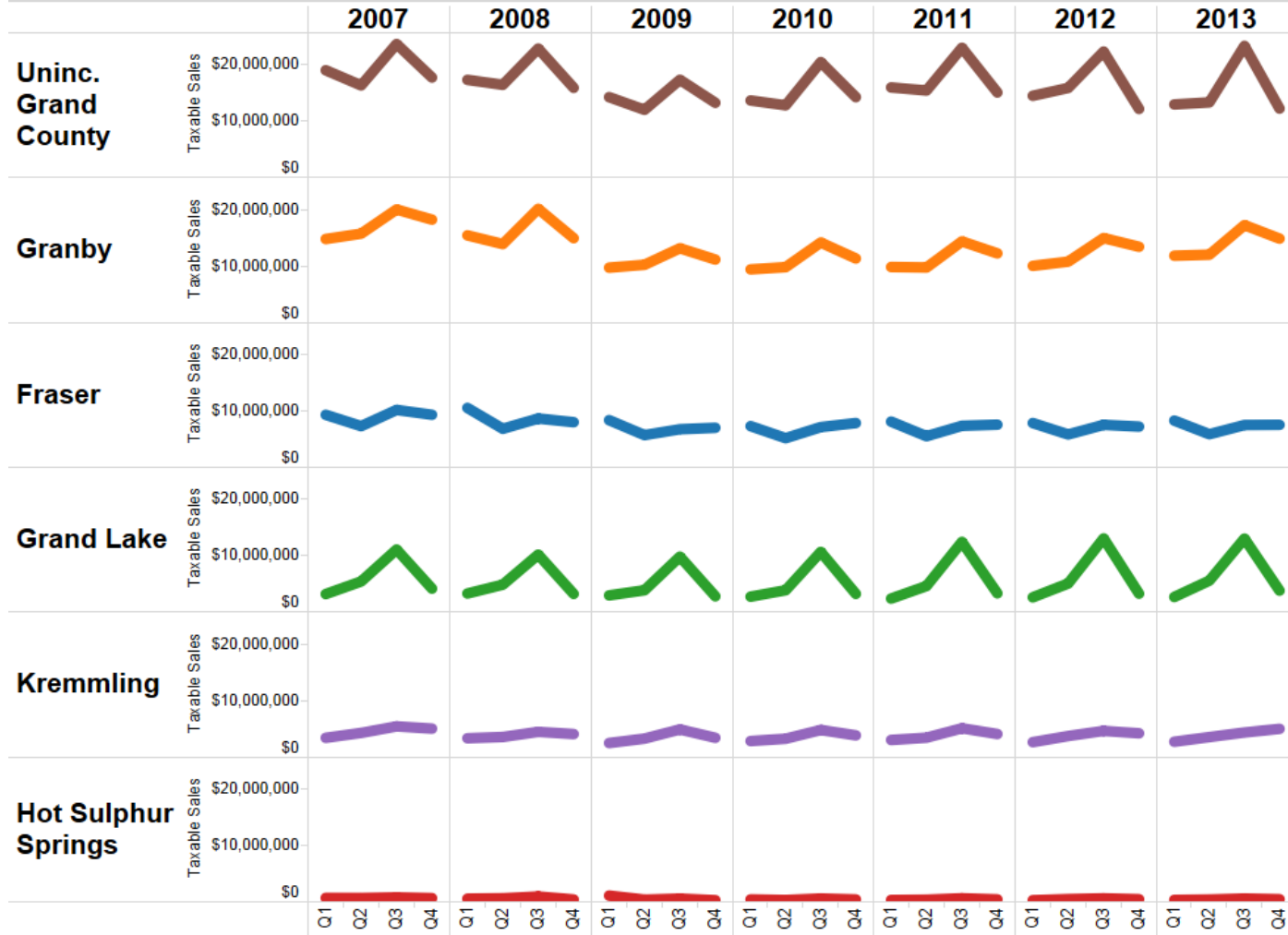


Source: CO Department of Revenue



Grand County Taxable Sales by Town

Quarterly Taxable Sales by Town, 2007-2013
Sorted by Average Quarterly Sales, High to Low



Source: CO Department of Revenue

Grand County Taxable Sales by Town

Quarterly Taxable Sales by Town, 2007-2013

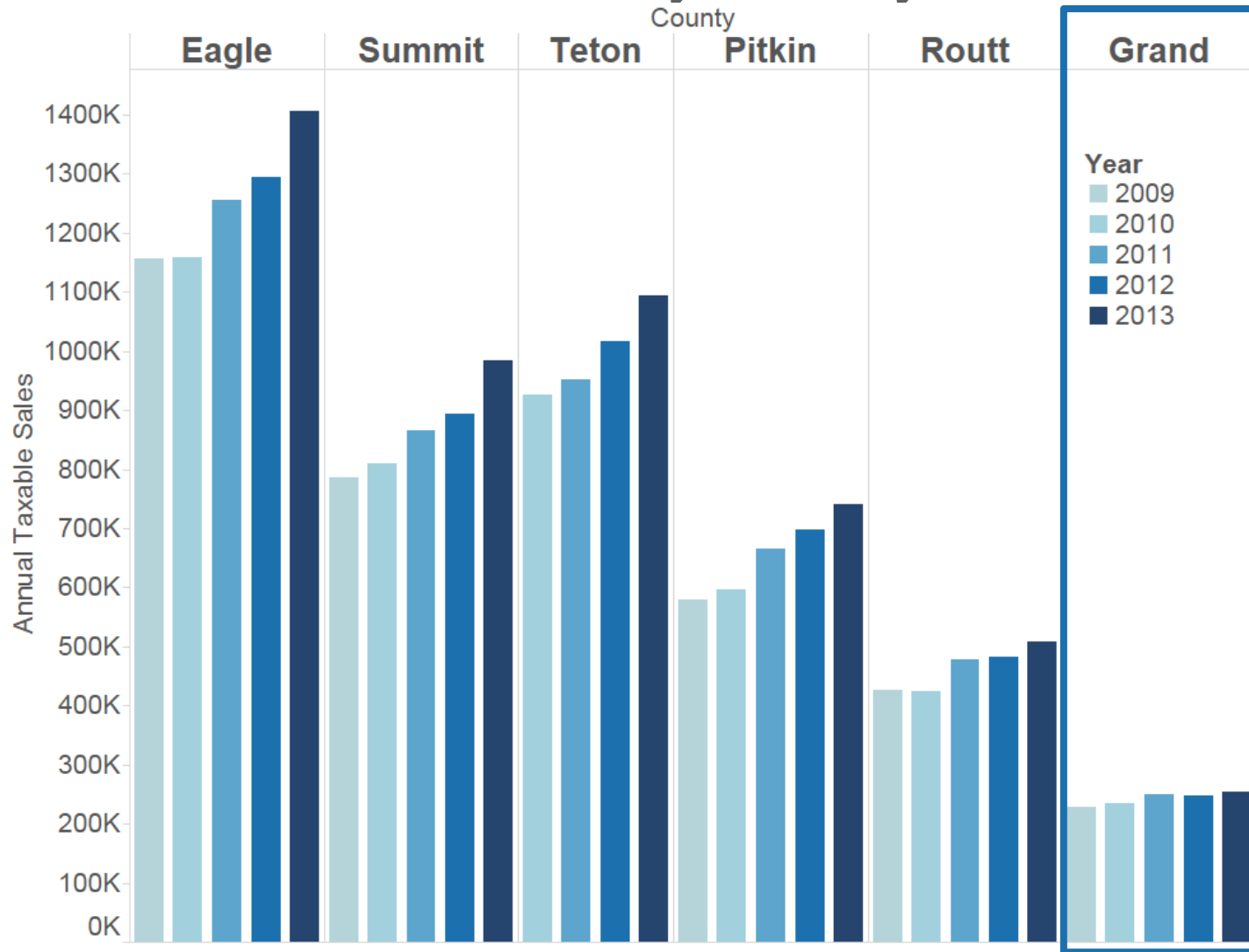
Sorted by Average Quarterly Sales, High to Low

Quarter	Year	Winter Park	Uninc. Grand County	Granby	Fraser	Grand Lake	Kremmling	Hot Sulphur Springs
Q1	2007	34,722,091	19,023,236	14,786,548	9,338,420	3,135,648	3,450,511	688,226
	2008	36,766,615	17,316,475	15,432,647	10,562,916	3,236,167	3,378,670	550,502
	2009	31,237,738	14,242,421	9,735,621	8,390,806	2,903,597	2,534,369	1,103,742
	2010	32,166,517	13,646,300	9,432,966	7,326,172	2,676,414	2,886,828	424,759
	2011	31,213,133	15,962,067	9,849,401	8,126,281	2,334,772	3,075,319	324,657
	2012	30,787,054	14,476,770	10,049,049	7,870,680	2,557,805	2,691,032	285,067
	2013	34,203,911	12,940,659	11,841,745	8,310,682	2,617,173	2,765,349	340,834
Q2	2007	8,728,063	16,329,474	15,732,101	7,319,900	5,382,494	4,316,126	668,785
	2008	9,418,750	16,431,670	13,894,180	6,855,363	4,811,767	3,598,436	620,274
	2009	8,401,754	11,988,522	10,243,919	5,727,096	3,814,155	3,314,451	382,268
	2010	8,219,000	12,789,920	9,825,966	5,177,724	3,818,621	3,292,724	323,379
	2011	7,682,905	15,415,572	9,766,442	5,528,398	4,570,466	3,476,499	376,081
	2012	7,642,597	15,875,969	10,806,558	5,842,539	5,018,967	3,767,438	480,194
	2013	8,410,017	13,313,373	12,022,075	5,884,822	5,527,794	3,582,771	405,272
Q3	2007	11,017,393	23,693,748	19,998,288	10,203,001	11,061,054	5,471,456	788,282
	2008	11,230,381	22,882,423	20,114,502	8,679,158	10,154,382	4,504,965	942,414
	2009	9,830,103	17,328,945	13,158,966	6,772,103	9,794,655	4,934,966	558,793
	2010	9,817,194	20,472,022	14,166,877	7,153,486	10,632,792	4,836,855	572,979
	2011	10,906,372	23,024,233	14,364,716	7,384,209	12,418,498	5,137,709	609,907
	2012	11,590,420	22,347,470	14,959,731	7,552,589	13,043,704	4,673,794	598,297
	2013	11,886,867	23,355,350	17,239,896	7,520,354	13,010,240	4,390,543	569,051
Q4	2007	16,412,729	17,728,434	18,201,103	9,346,339	4,107,632	5,077,797	647,704
	2008	14,315,020	15,896,292	14,932,155	8,021,538	3,164,897	4,111,413	409,105
	2009	13,737,966	13,234,522	11,168,621	7,030,103	2,743,069	3,454,310	287,931
	2010	14,098,383	14,241,938	11,356,766	7,869,540	3,170,989	3,883,429	416,470
	2011	14,533,092	15,069,312	12,255,034	7,580,763	3,267,469	4,119,400	427,834
	2012	13,577,512	12,144,665	13,419,276	7,239,715	3,205,952	4,247,305	455,692
	2013	15,502,396	12,208,363	14,854,373	7,552,751	3,750,293	5,037,611	456,623

Source: CO Department of Revenue



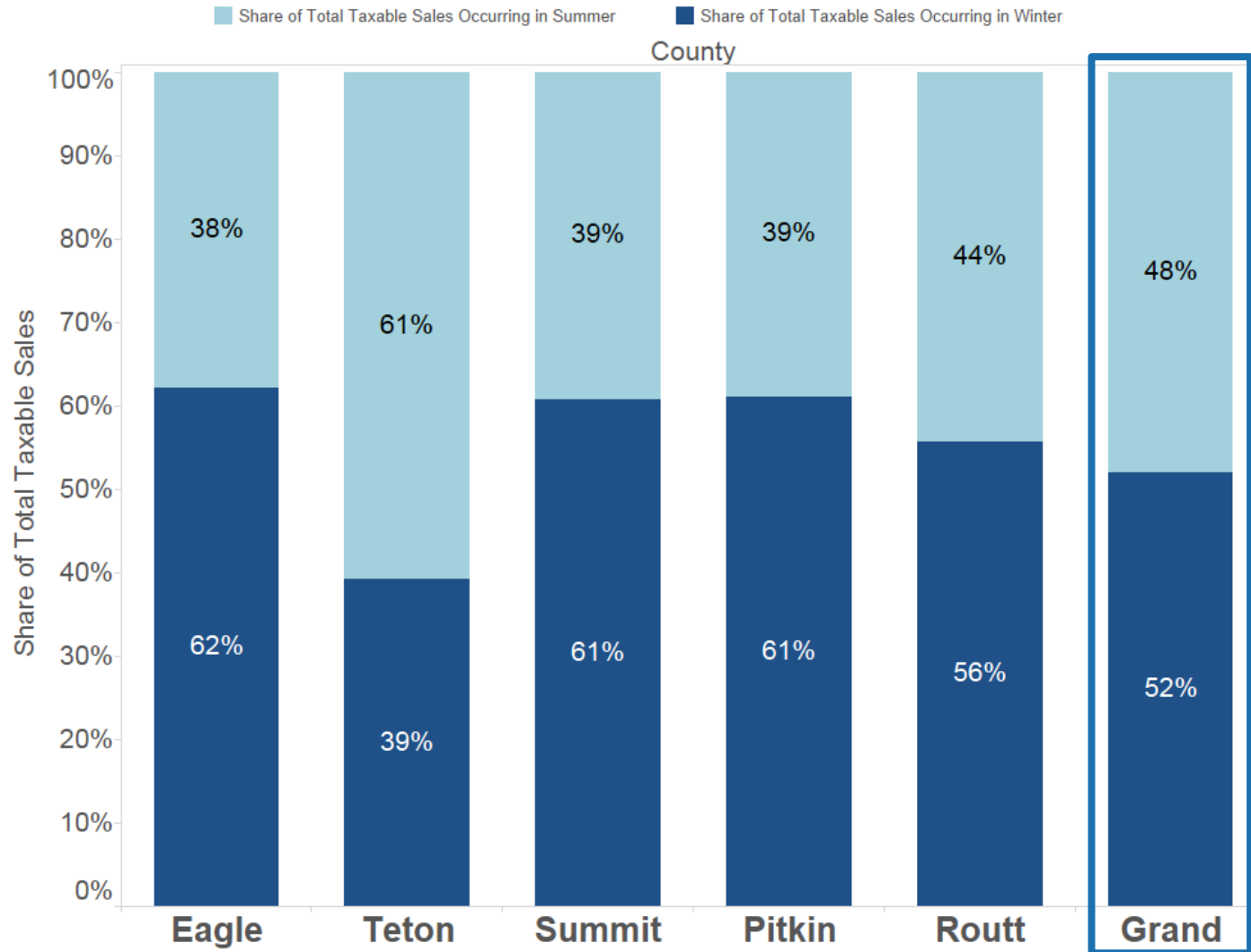
Total Taxable Sales – by County



Winter= Nov-Apr Summer=May-Oct
 Source: CO Department of Revenue, WY Department of Revenue



Share of Taxable Sales by Season – by County



Winter= Nov-Apr Summer=May-Oct
Source: CO Department of Revenue, WY Department of Revenue

Economic Trends & Markets



Economic Structure and Trends



Employment



Business Profile



Summer Visitor Profile

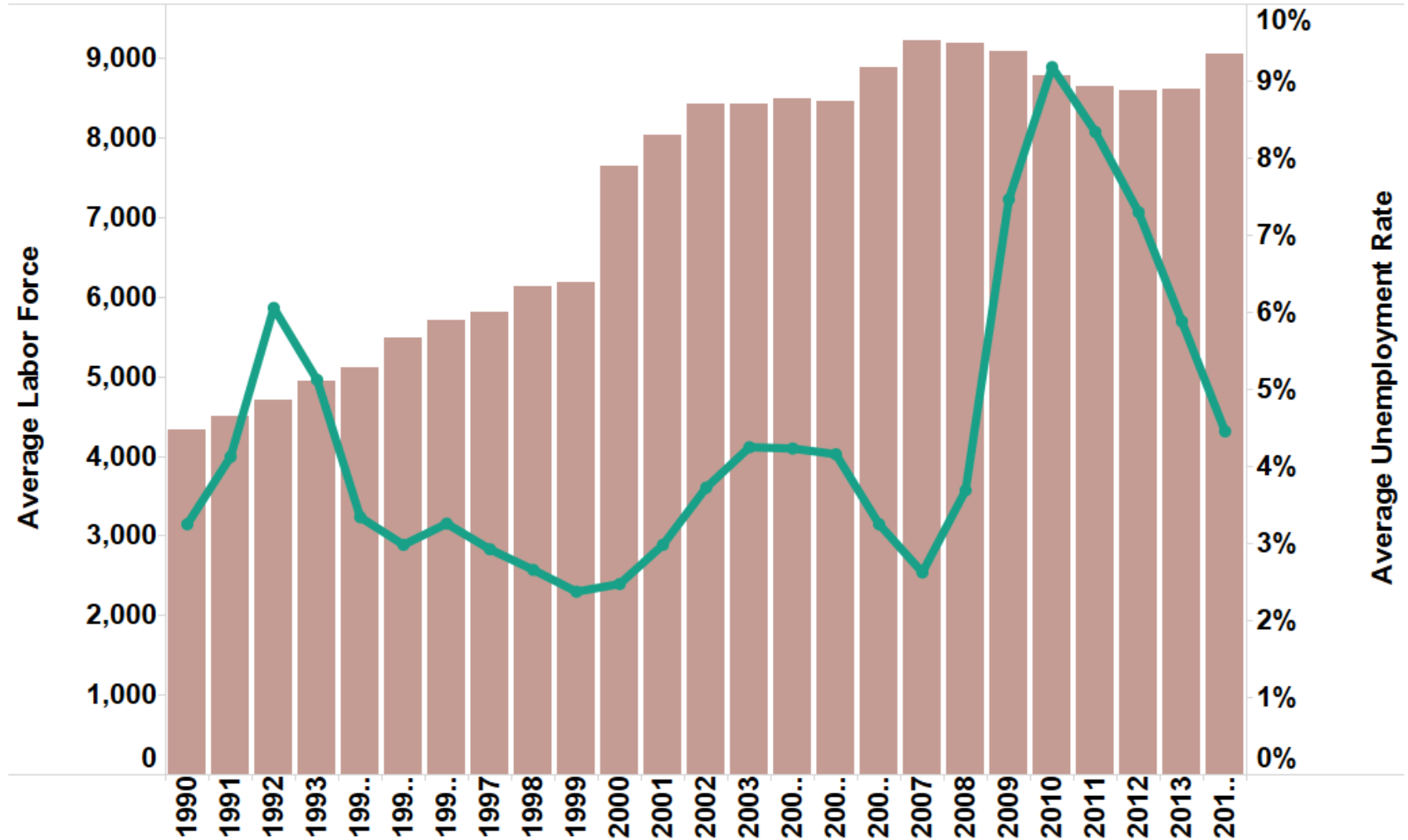


Resident Profile



Grand Labor Force & Employment, 1990 – 2014

Grand County Labor Force and Employment

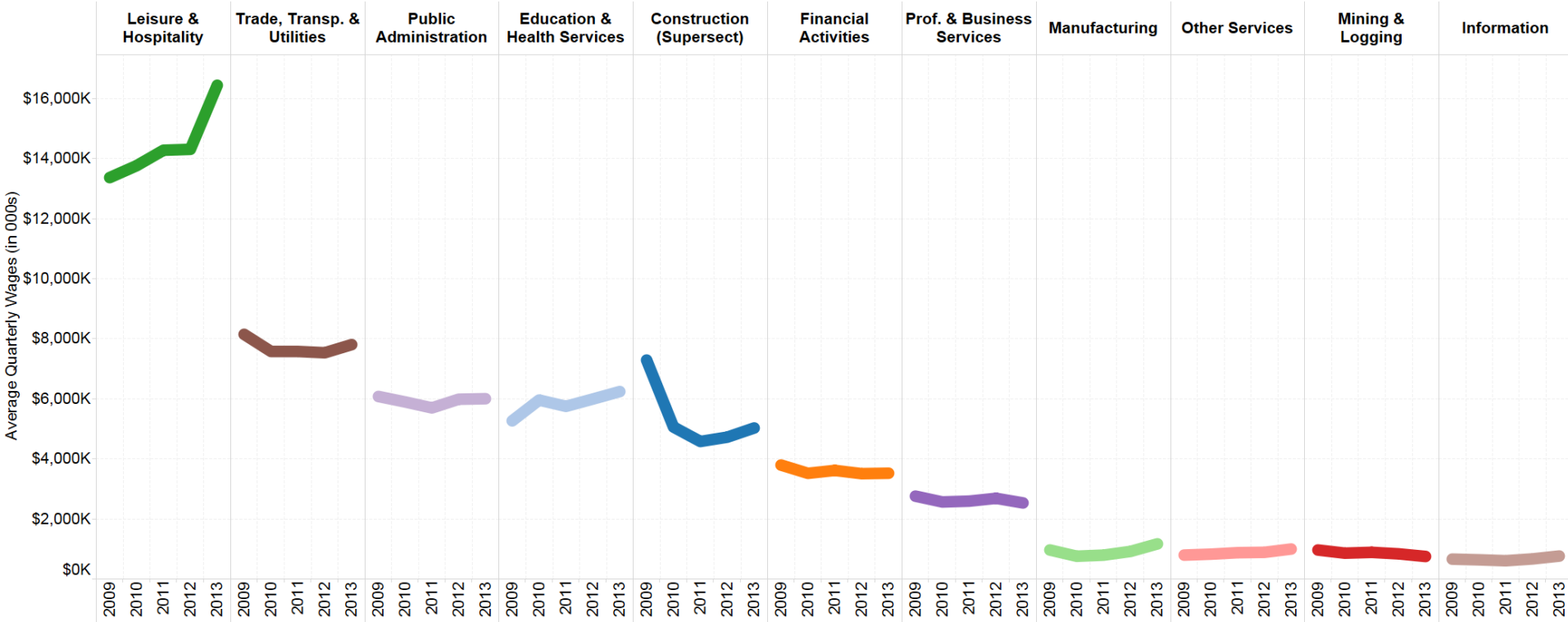


Source: CO Department of Labor and Employment



Grand County Average Wages by Sector, 2009 – 2013

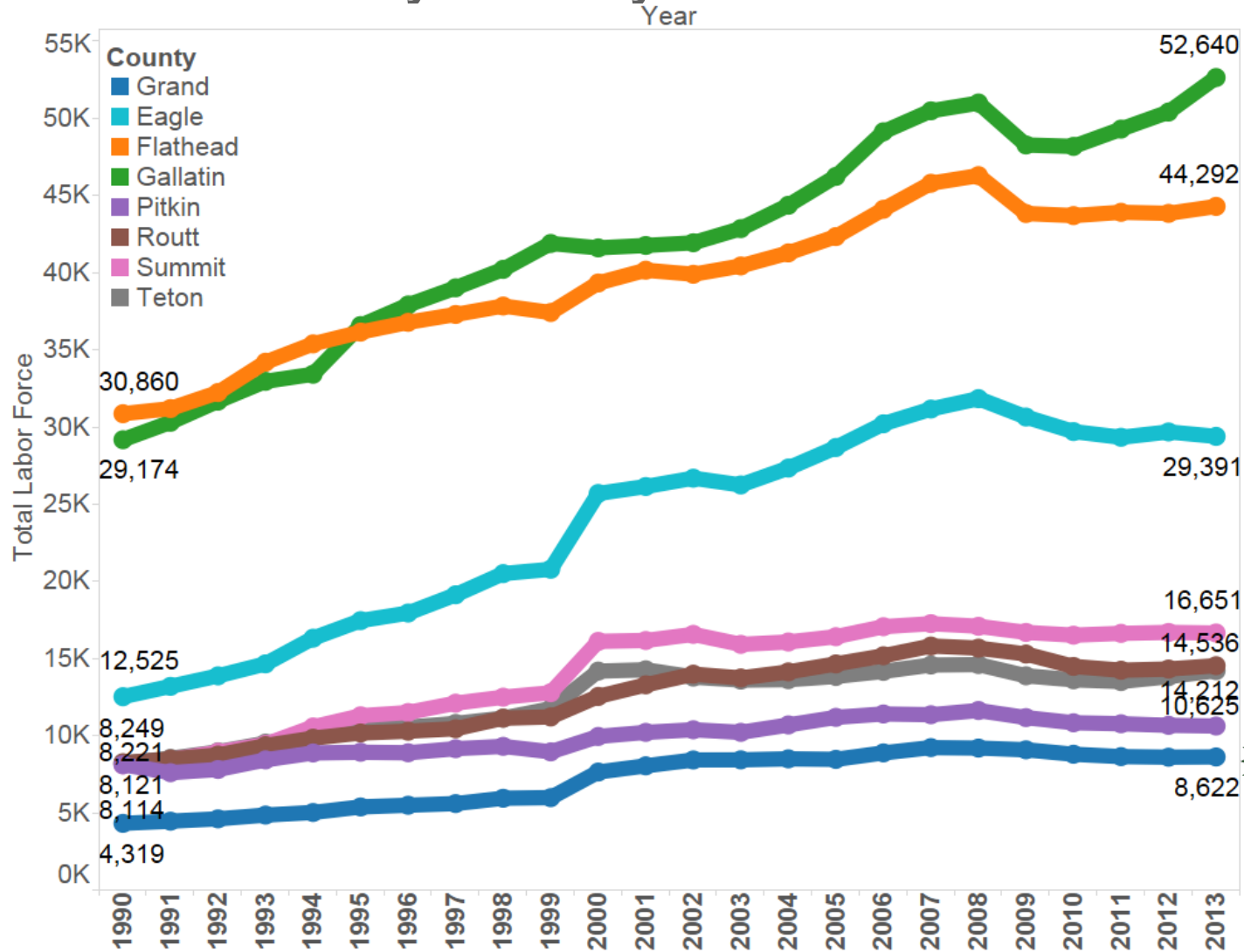
Grand County Employment and Wages



Source: CO Department of Labor and Employment



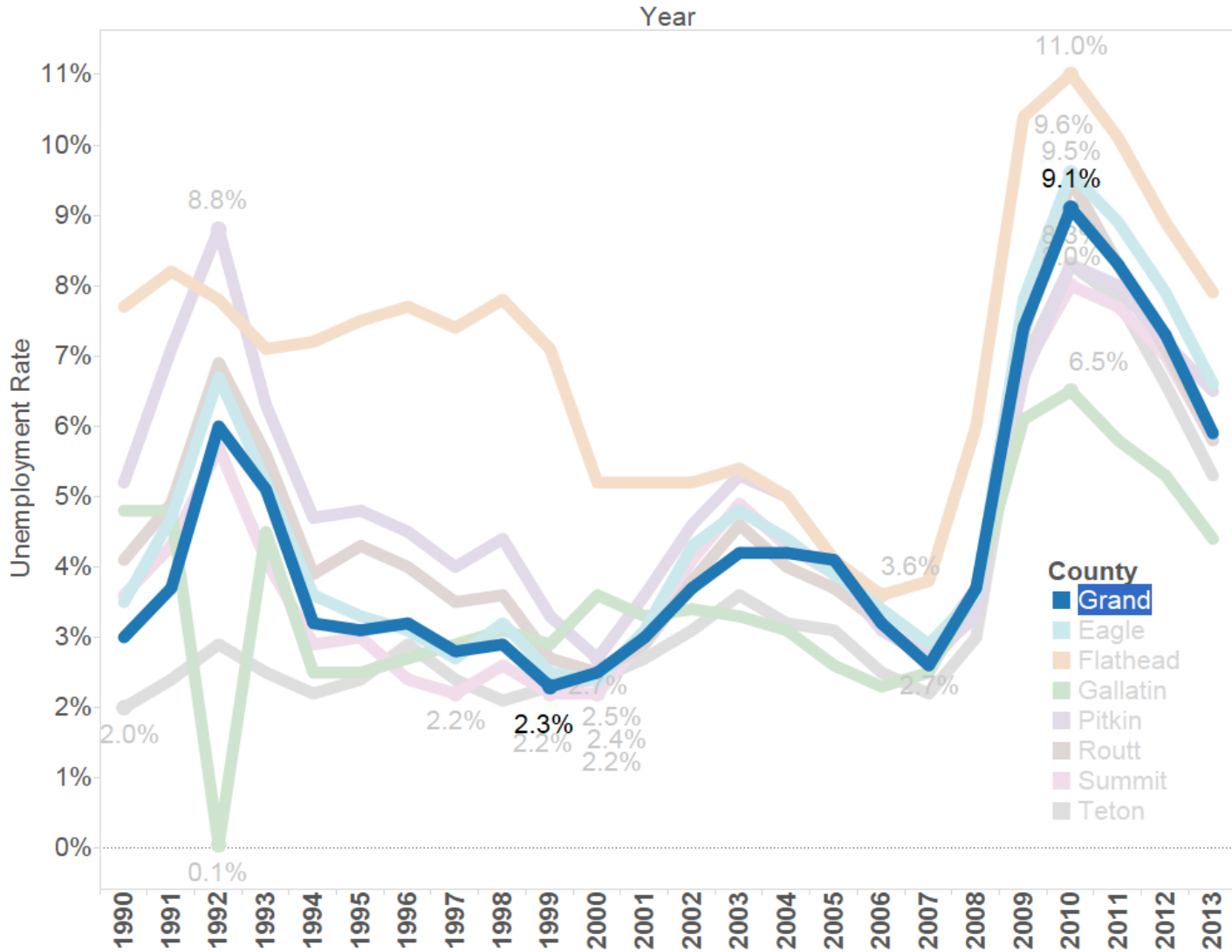
Labor Force – by County



Source: US Bureau of Labor Statistics



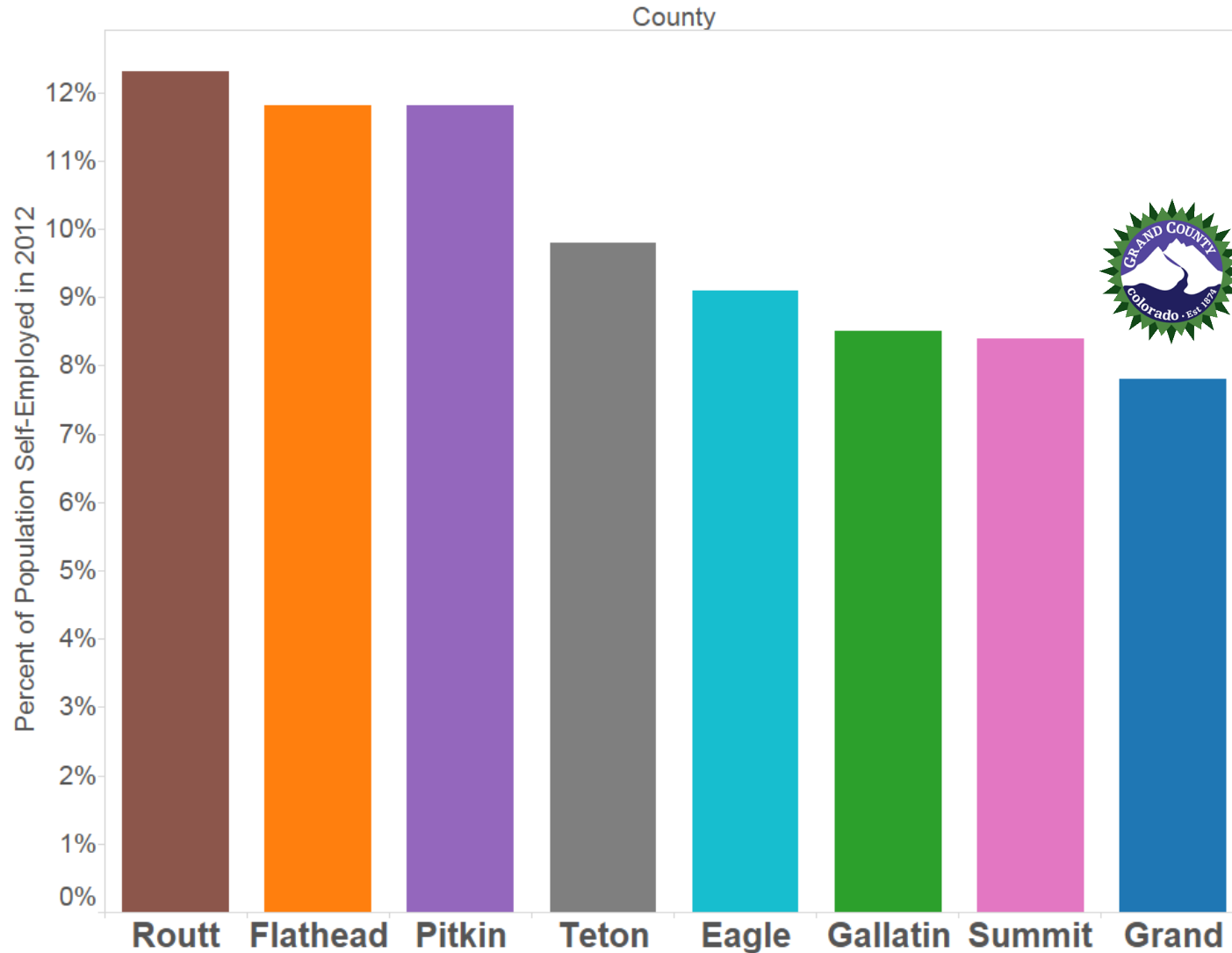
Unemployment Rate – by County



Source: US Bureau of Labor Statistics



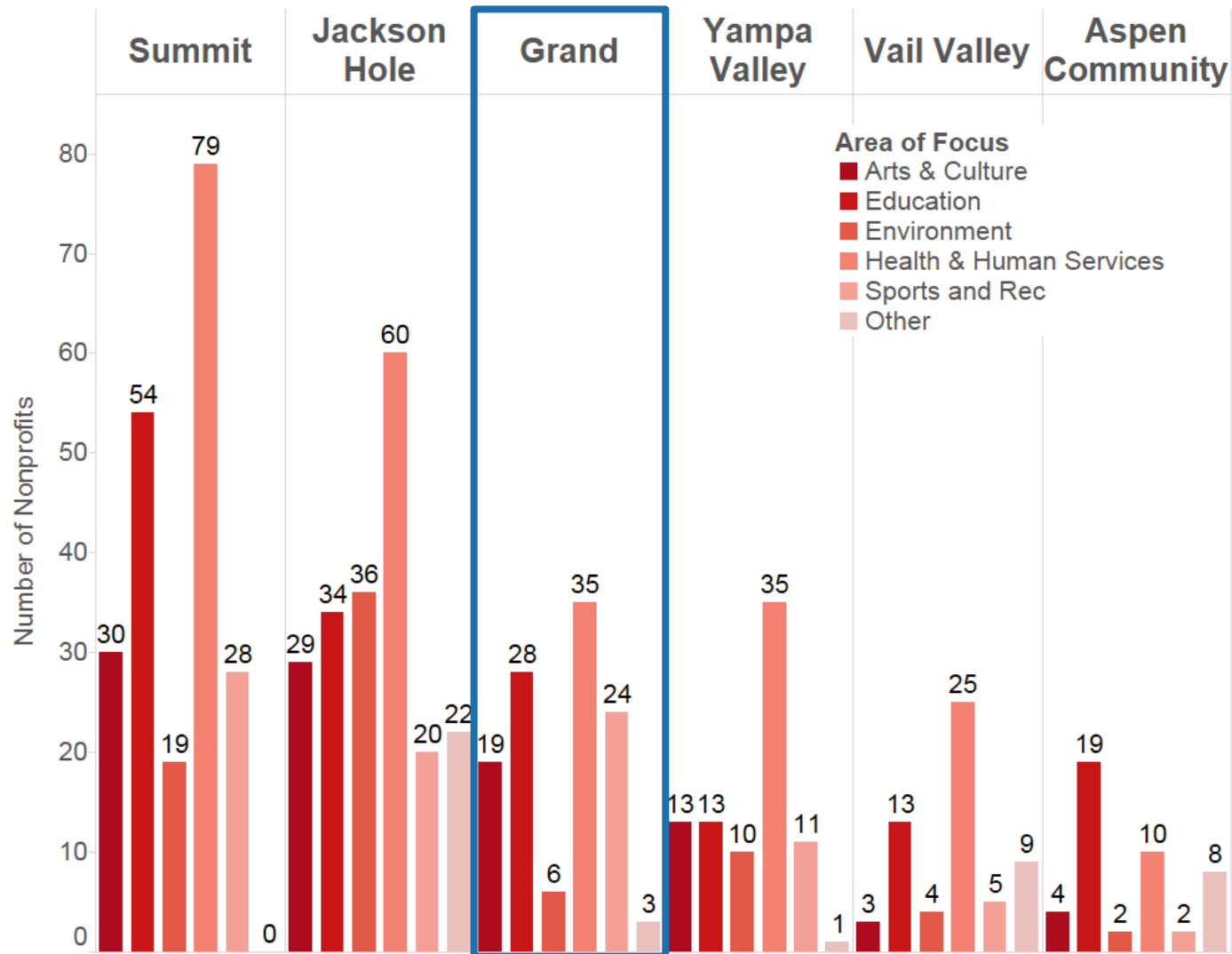
Self-Employment Rate – by County, 2012



Source: US Census Bureau, 2012 American Community Survey 5-year estimates



Number of Non-Profits – by County



Source: Grand Foundation, Summit Foundation, Yampa Foundation, Vail Valley Foundation, Aspen Community Foundation, Community Foundation of Jackson Hole

Economic Trends & Markets



Economic Structure and Trends



Employment



Business Profile



Summer Visitor Profile



Resident Profile

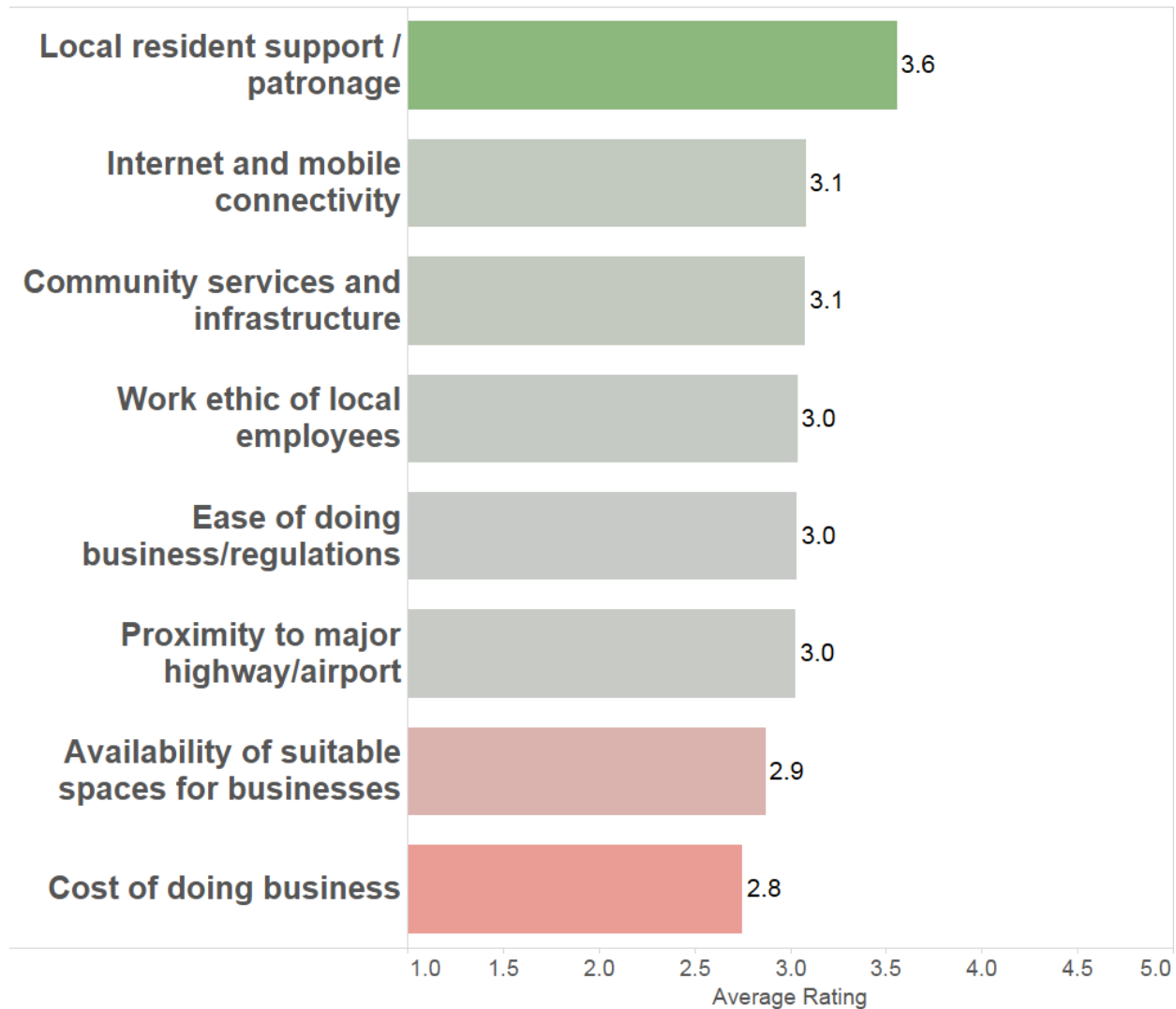


Survey Methodology and Response Rate

- Methodology
 - Emailed business owners or managers identified by each of the Grand County Chambers of Commerce.
 - Offered survey sign-up online at grandprofile.org, upon sign-up a survey was emailed to the respective business
 - Respondents could be entered to win 1 of 5 \$100 Visa Gift Cards
- Response Rate
 - 206 responses collected through 11/3/2014



Rating Relative to doing Business in Grand County

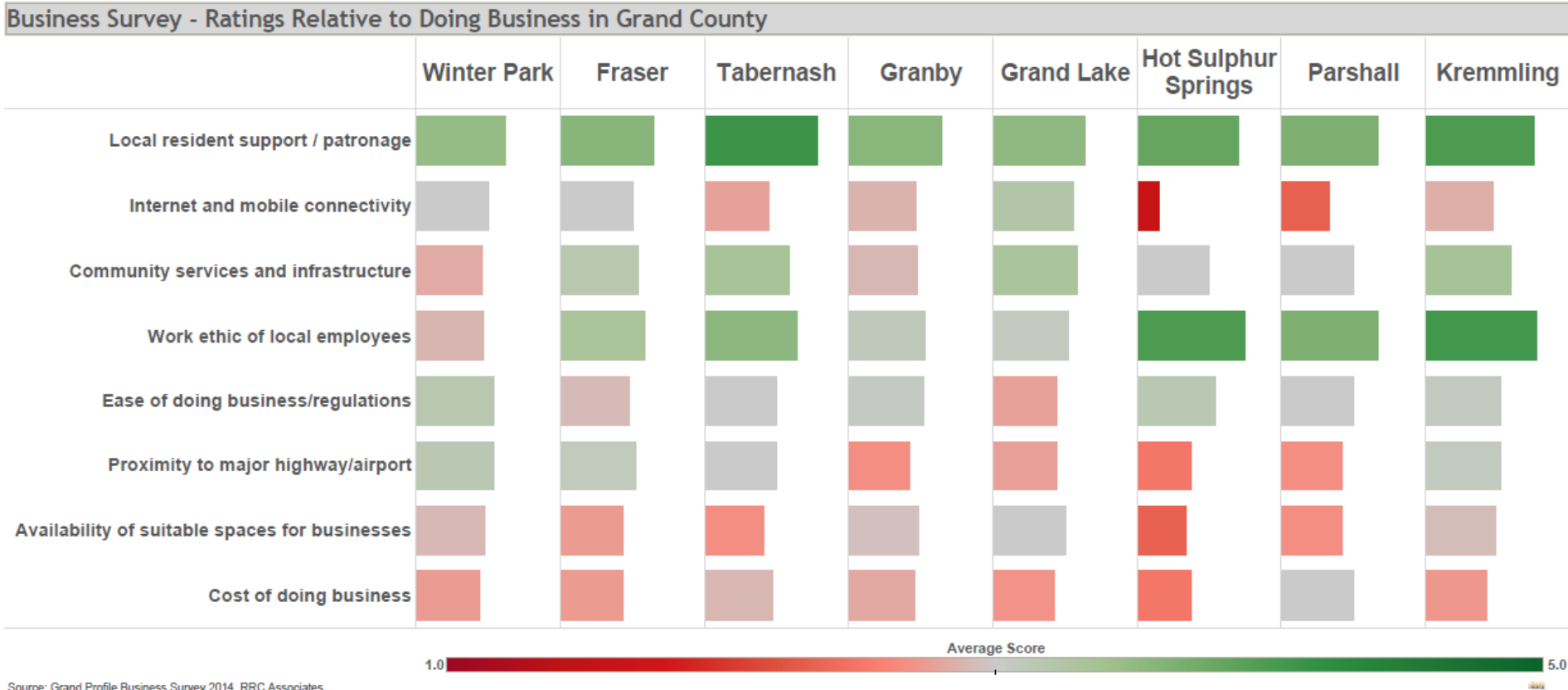


Source: Grand Profile Business Survey 2014, RRC Associates



Rating Relative to doing Business in Grand County

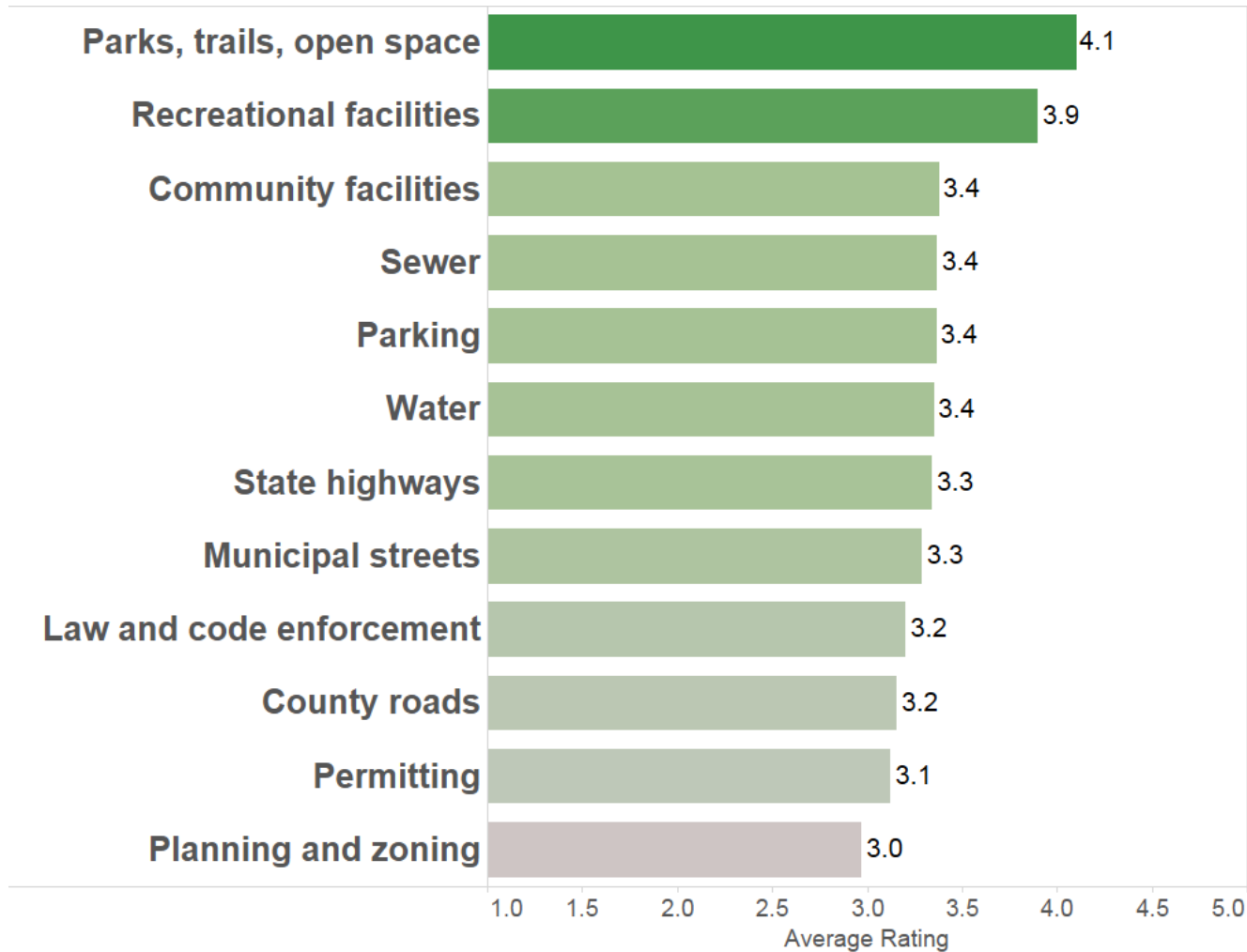
– by Town



Source: Grand Profile Business Survey 2014, RRC Associates



Satisfaction with Public Facilities and Services in Grand County

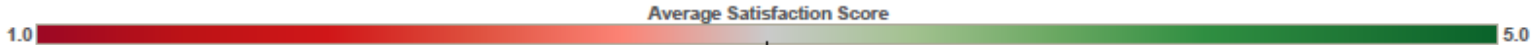
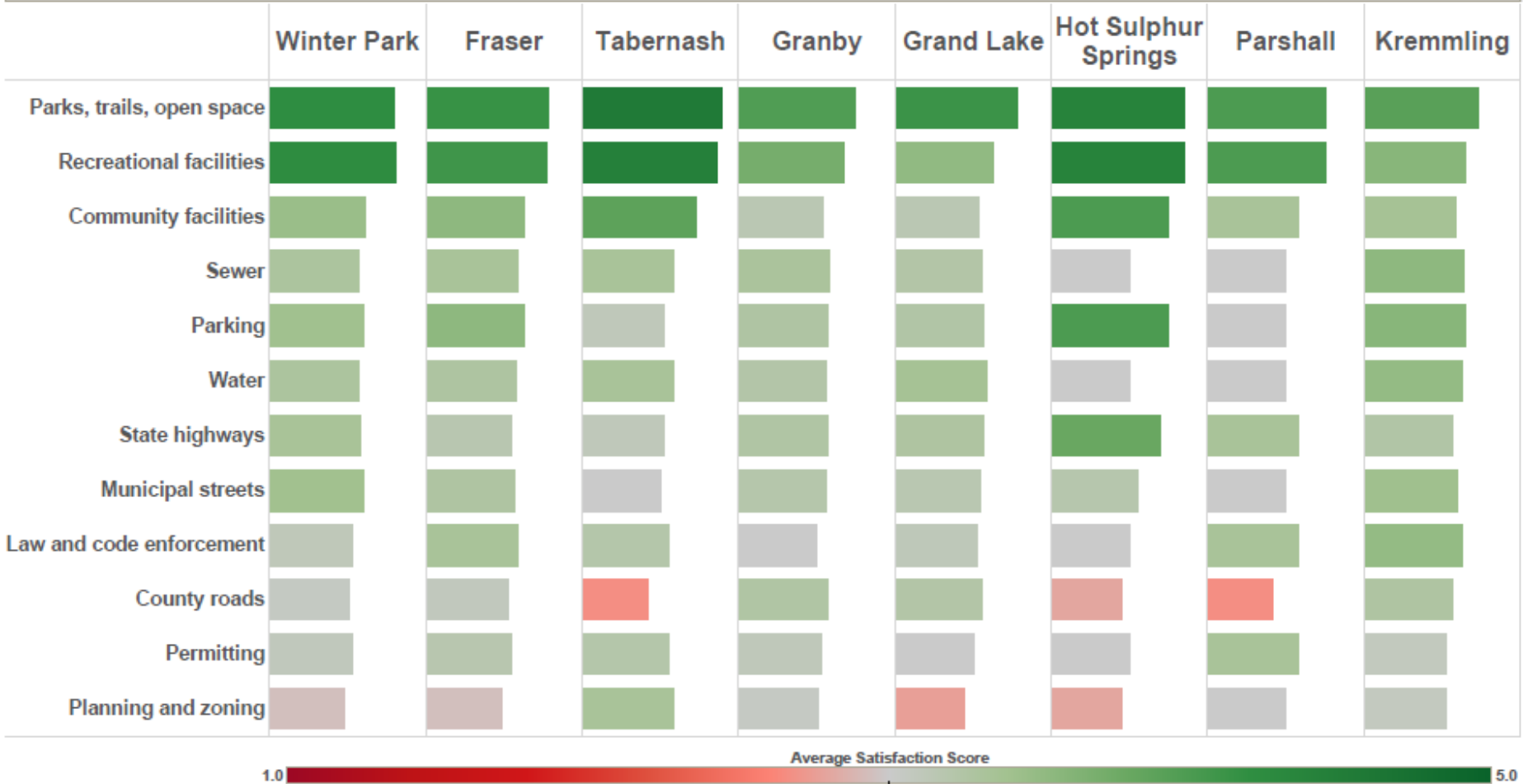


Source: Grand Profile Business Survey 2014, RRC Associates



Satisfaction with Public Facilities and Services in Grand County – by Town

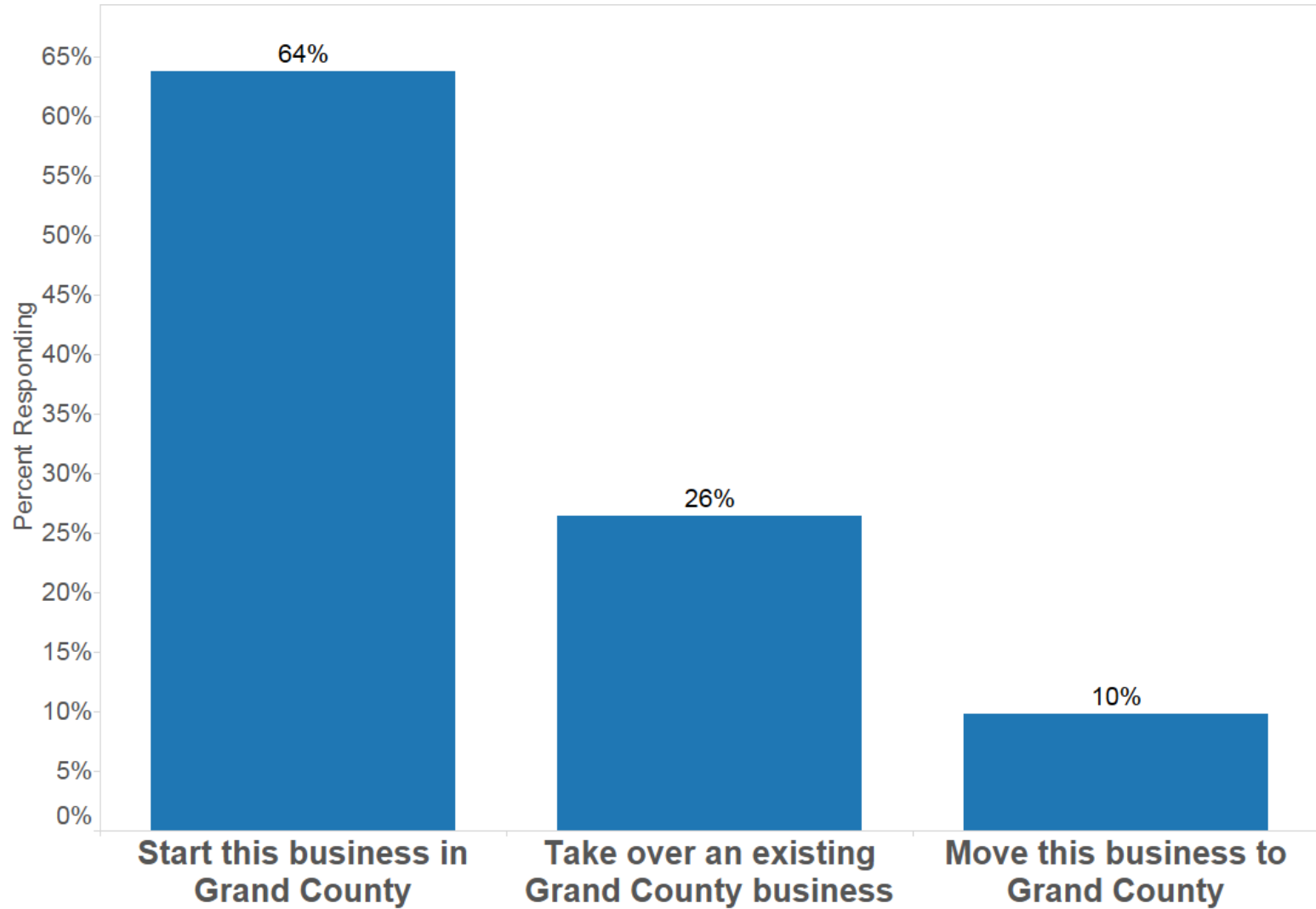
Business Survey - Satisfaction with Grand County Public Facilities and Services



Source: Grand Profile Business Survey 2014, RRC Associates



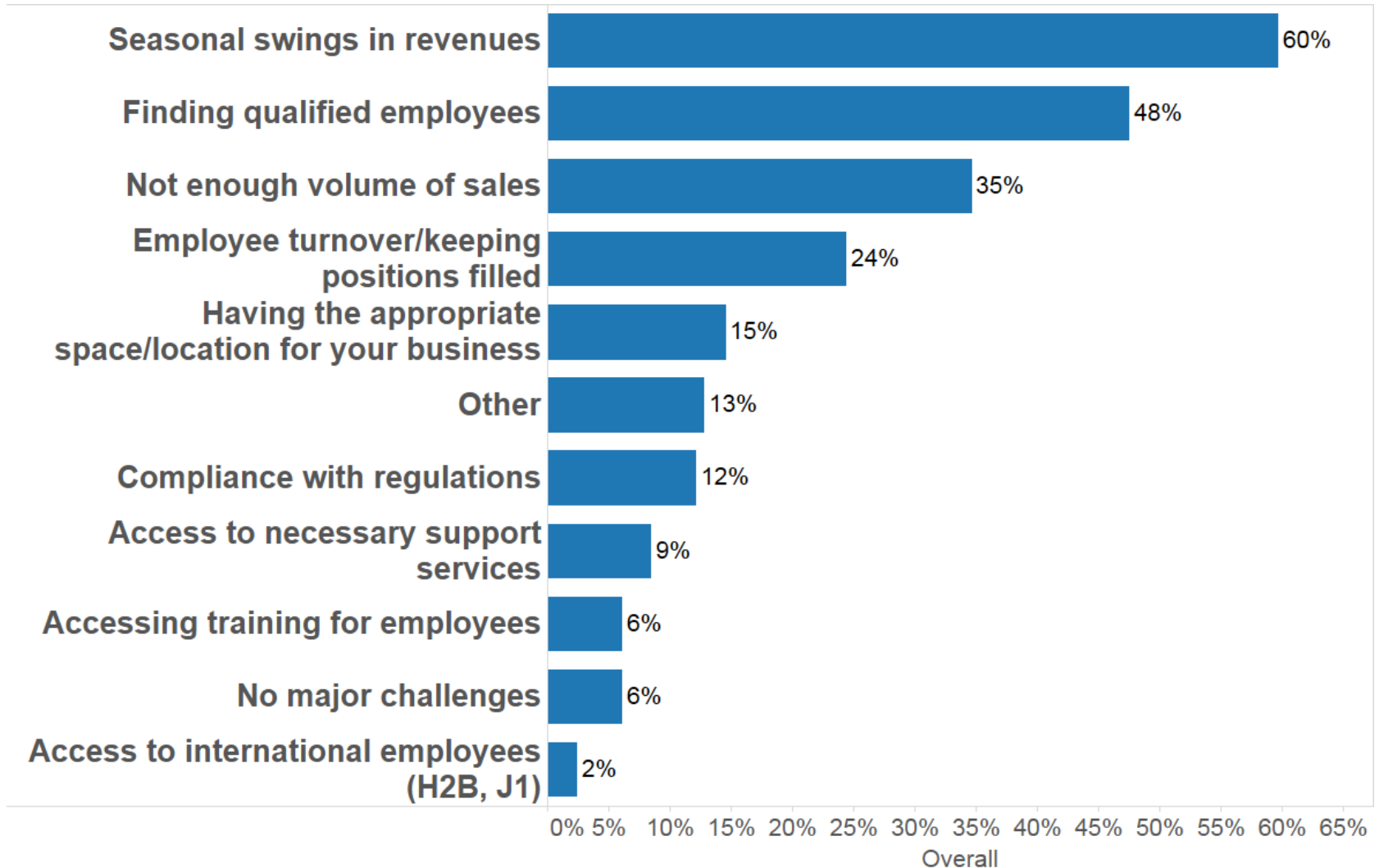
How Owner Started Business



Source: Grand Profile Business Survey 2014, RRC Associates



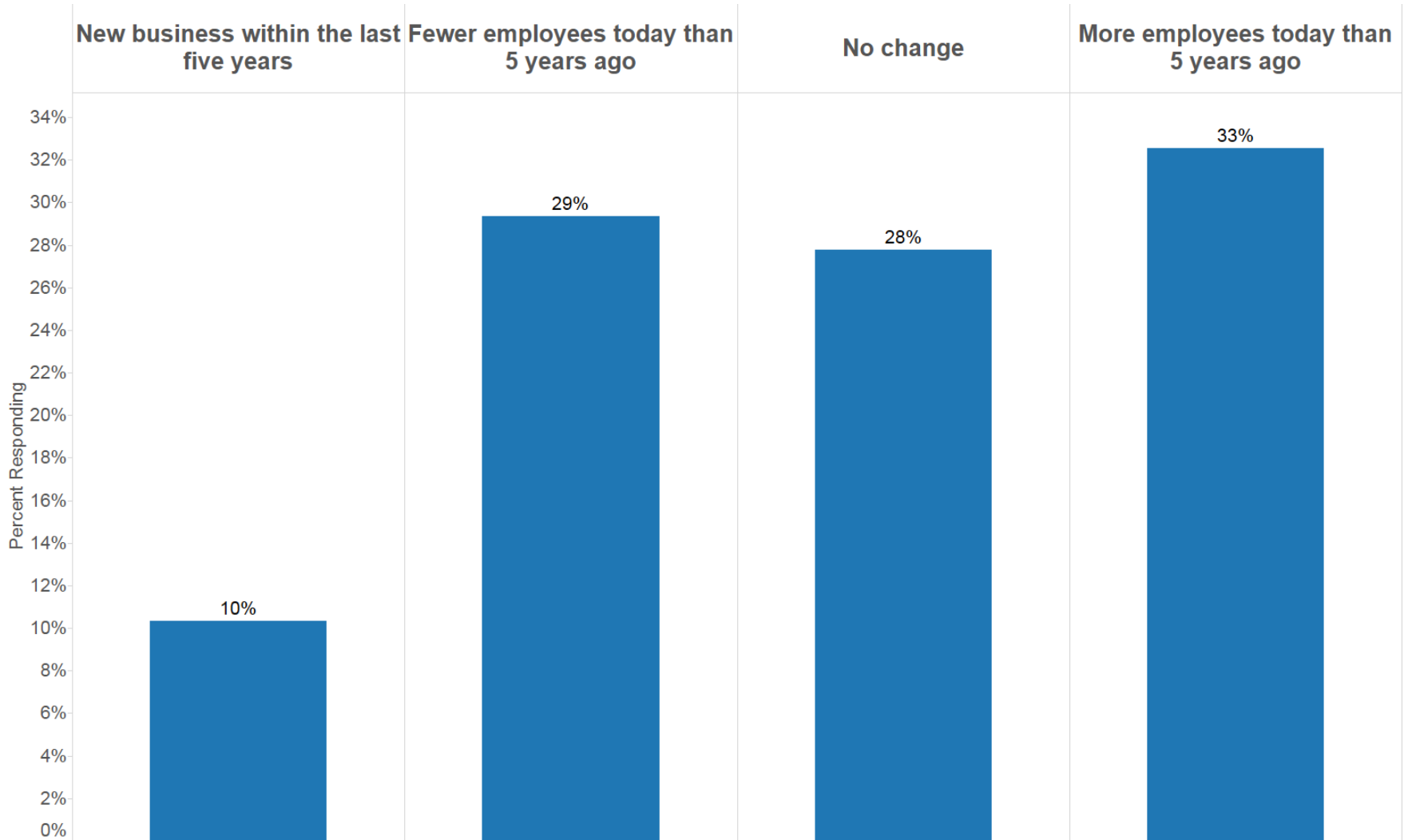
Challenges Faced by Business in Grand County



Source: Grand Profile Business Survey 2014, RRC Associates



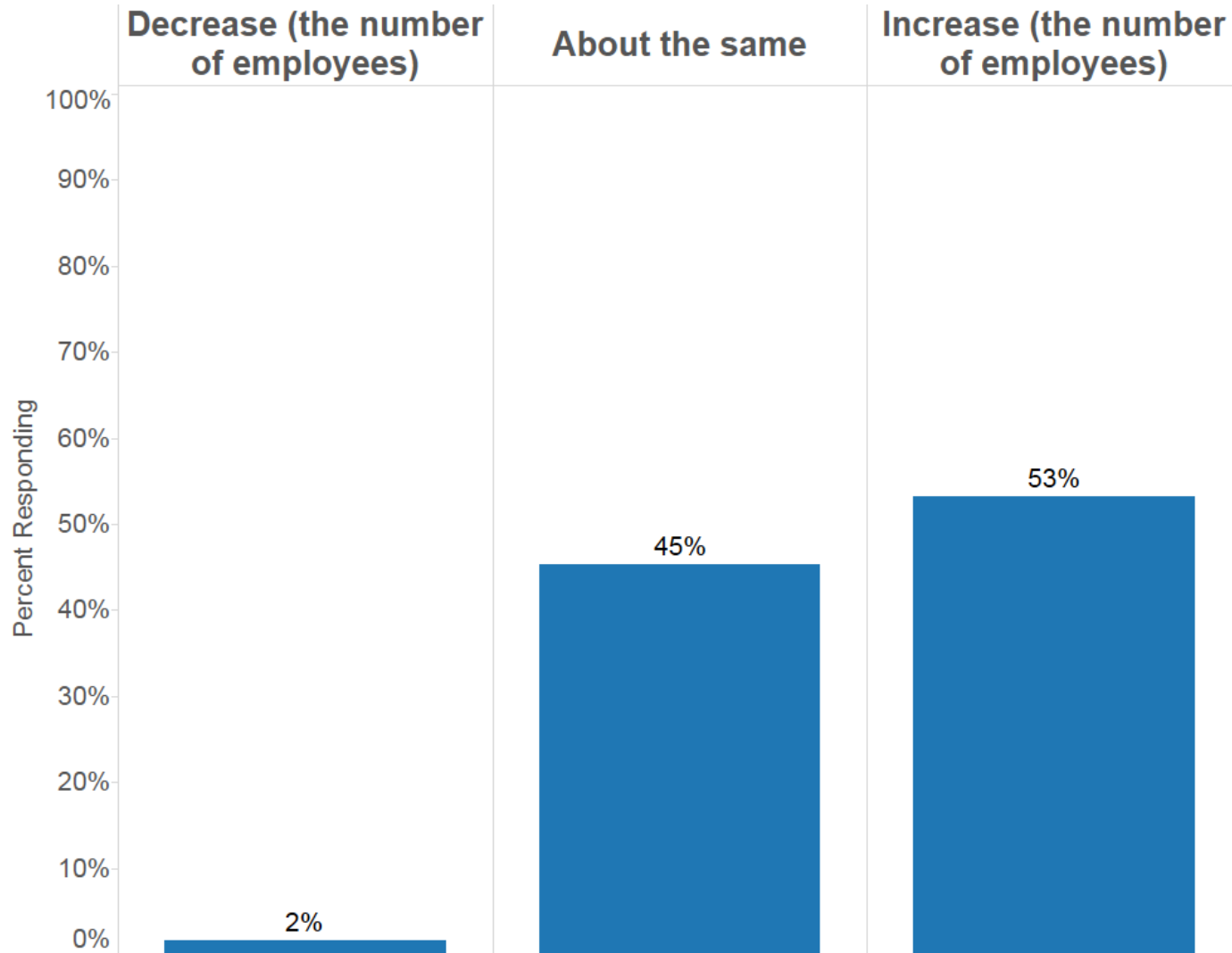
Changes in Employment



Source: Grand Profile Business Survey 2014, RRC Associates



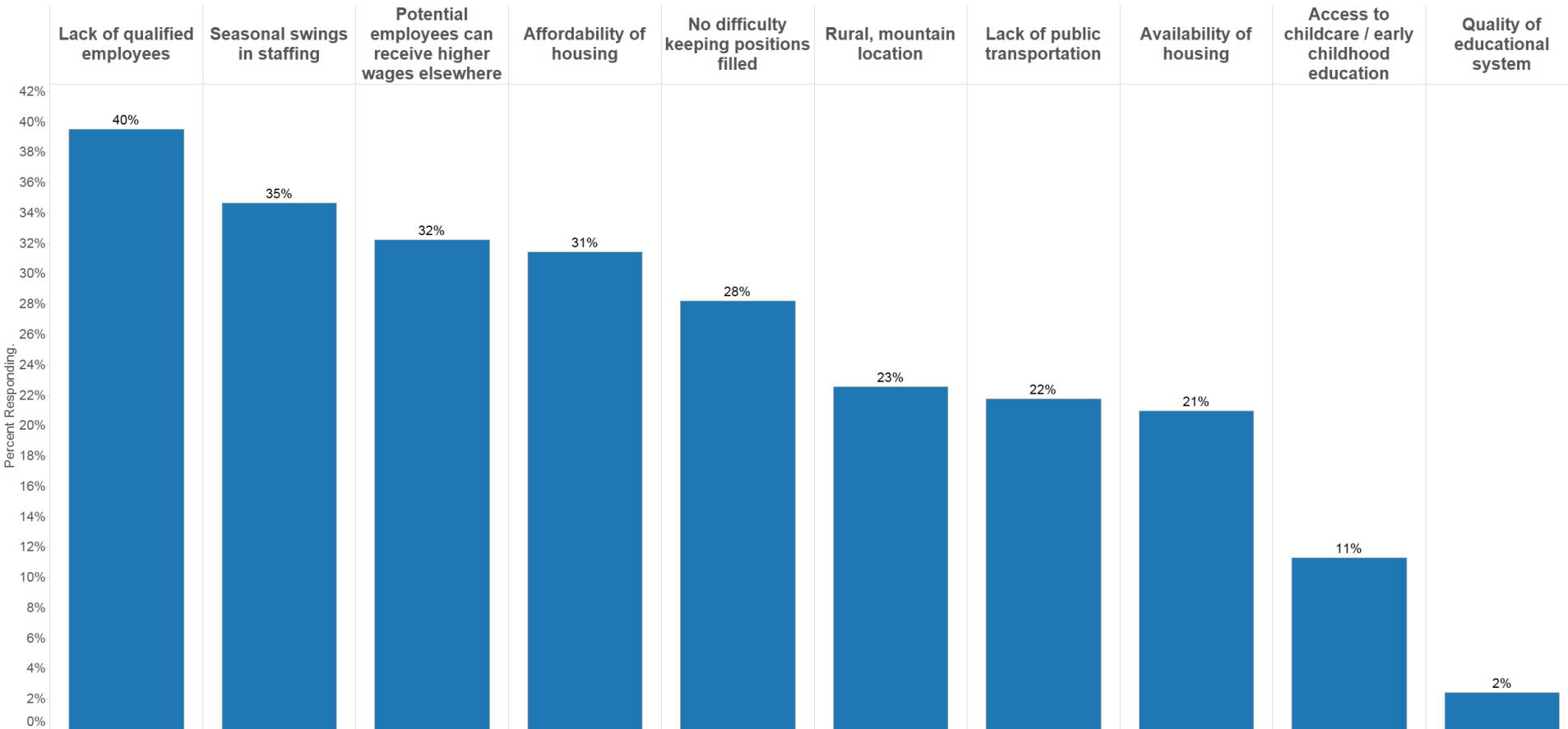
Future Changes to Employment



Source: Grand Profile Business Survey 2014, RRC Associates



Issues with Employment



Source: Grand Profile Business Survey 2014, RRC Associates



Importance of Factors to Locate Business In Grand County

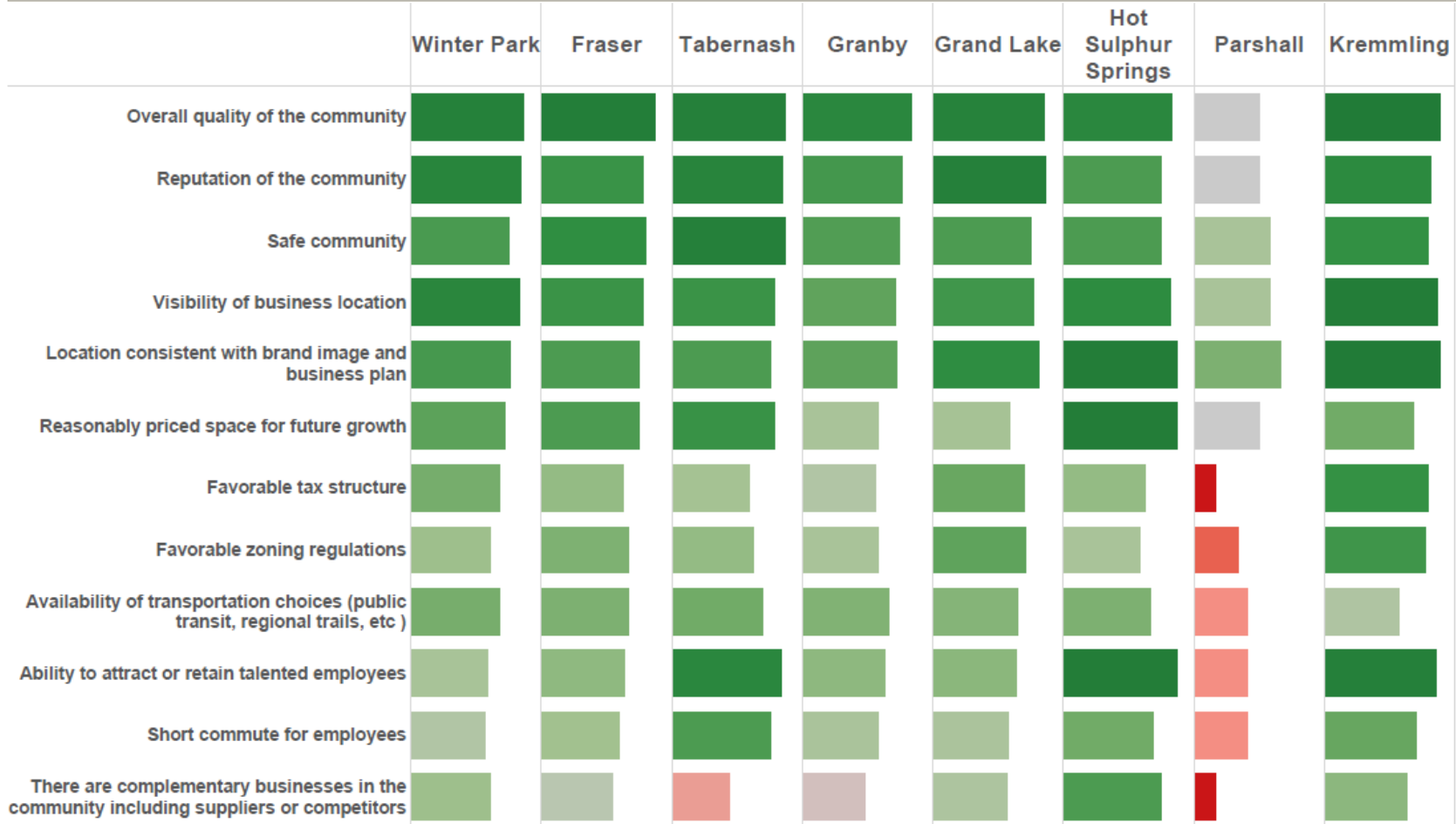


Source: Business Profile Survey 2014, RRC Associates



Importance of Factors to Locate Business In Grand County – by Town

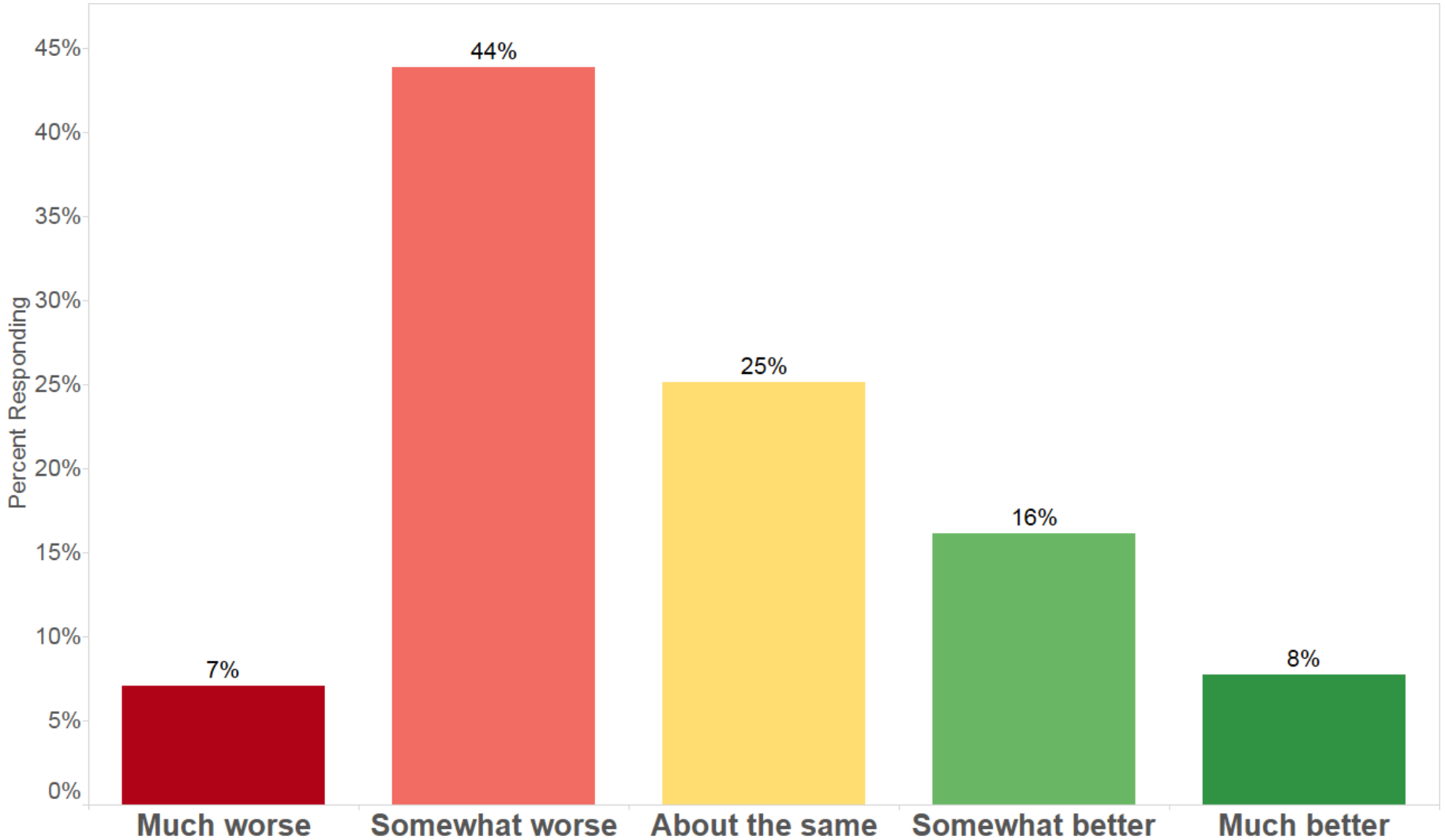
Business Survey - Factors Important to Locate or Maintain Business in Grand County



Source: Grand Profile Business Survey 2014, RRC Associates



Grand County vs. Other Communities for Business



Source: Grand Profile Business Survey 2014, RRC Associates

Economic Trends & Markets



Economic Structure and Trends



Employment



Business Profile



Summer Visitor Profile



Resident Profile

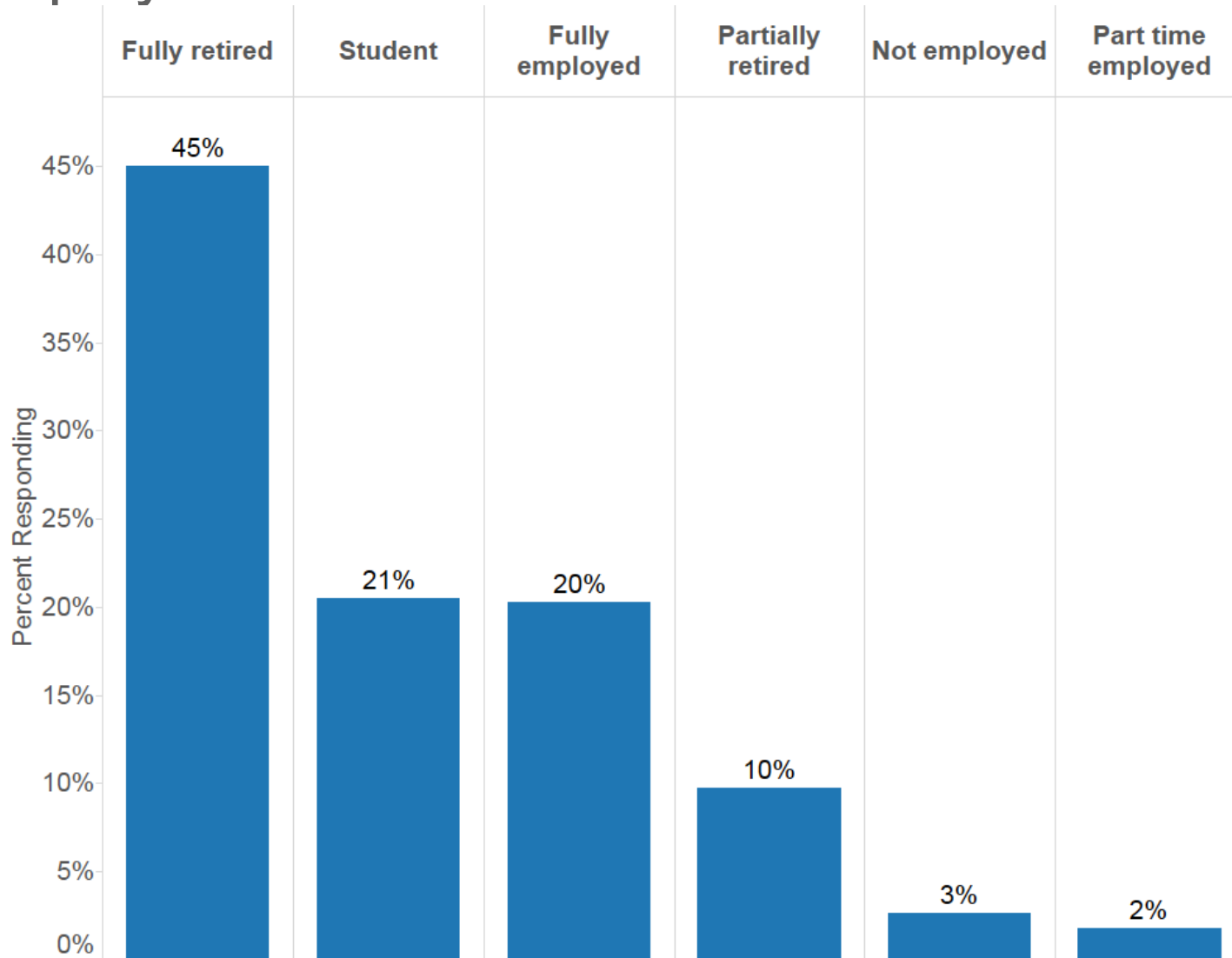


Survey Methodology and Response Rate

- Methodology
 - Mailed over 6,000 surveys to Grand County Residents
 - Survey invite offered an online version as well as paper survey return
 - Survey posted online at grandprofile.org as well
 - Respondents could be entered to win 1 of 5 \$100 Visa Gift Cards
- Response Rate
 - 1,486 responses collected through 11/3/2014



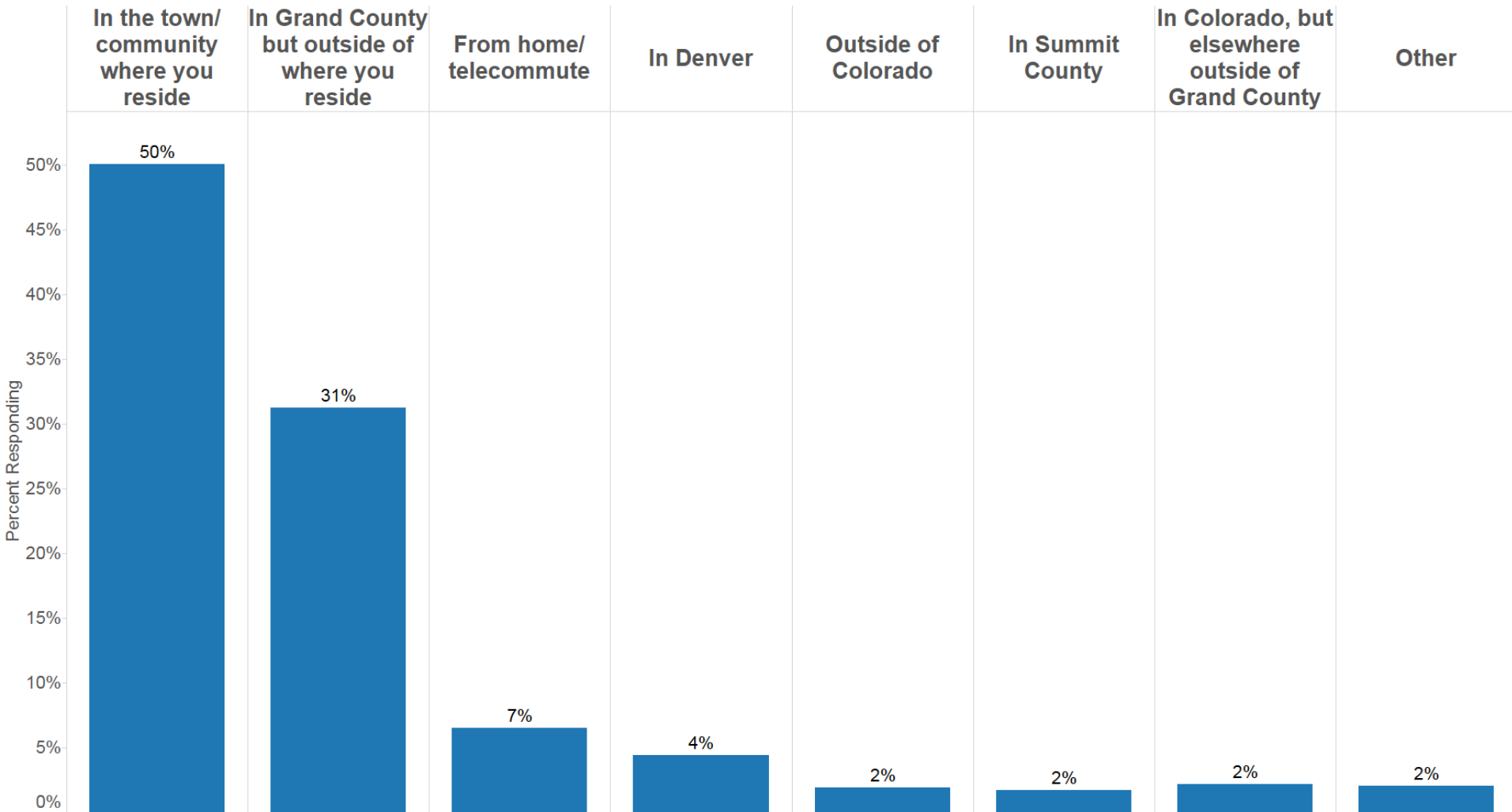
Employment Status



Source: Grand County Resident Profile Survey, RRC Associates



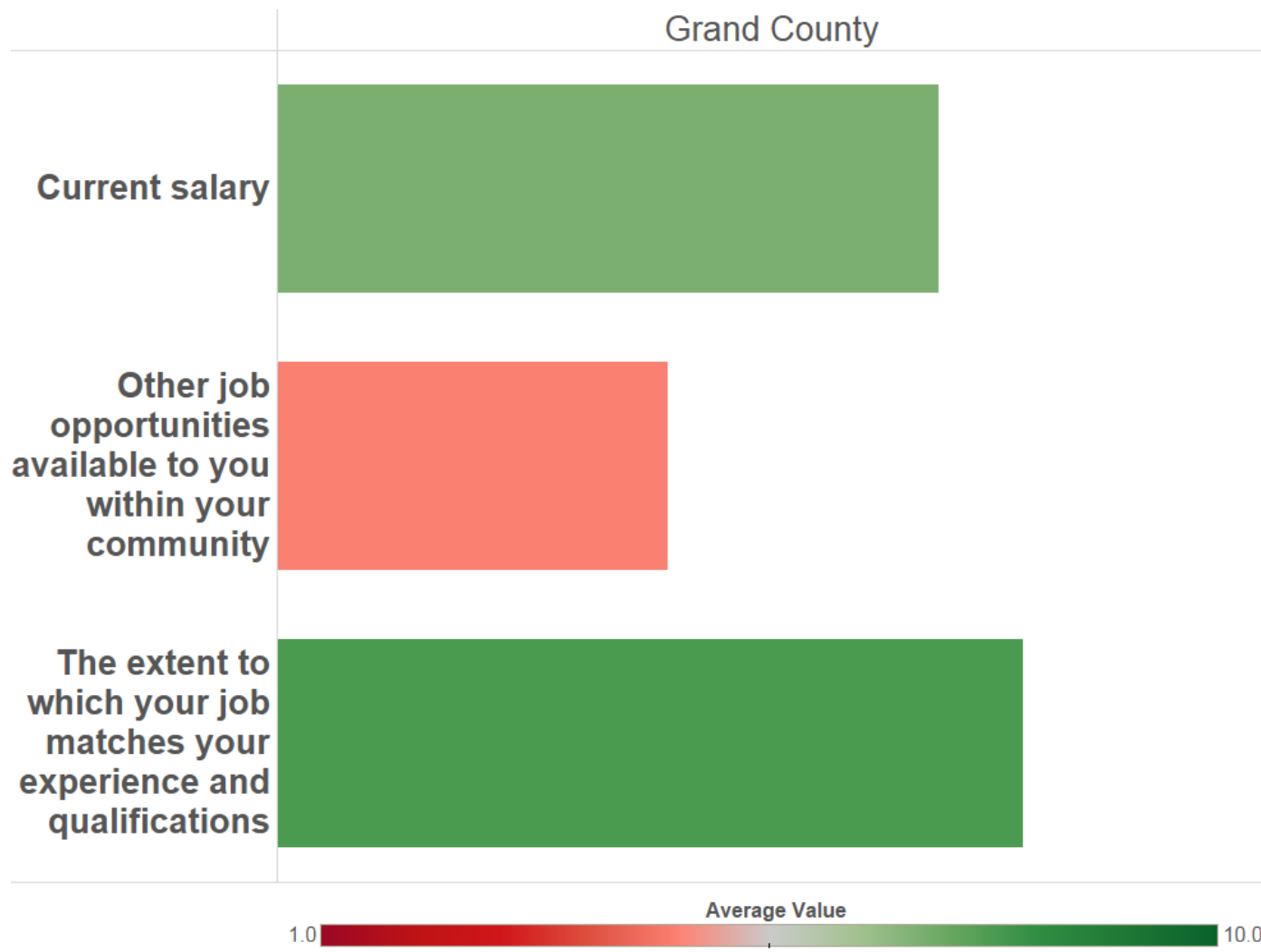
Location of Work



Source: Grand County Resident Profile Survey, RRC Associates



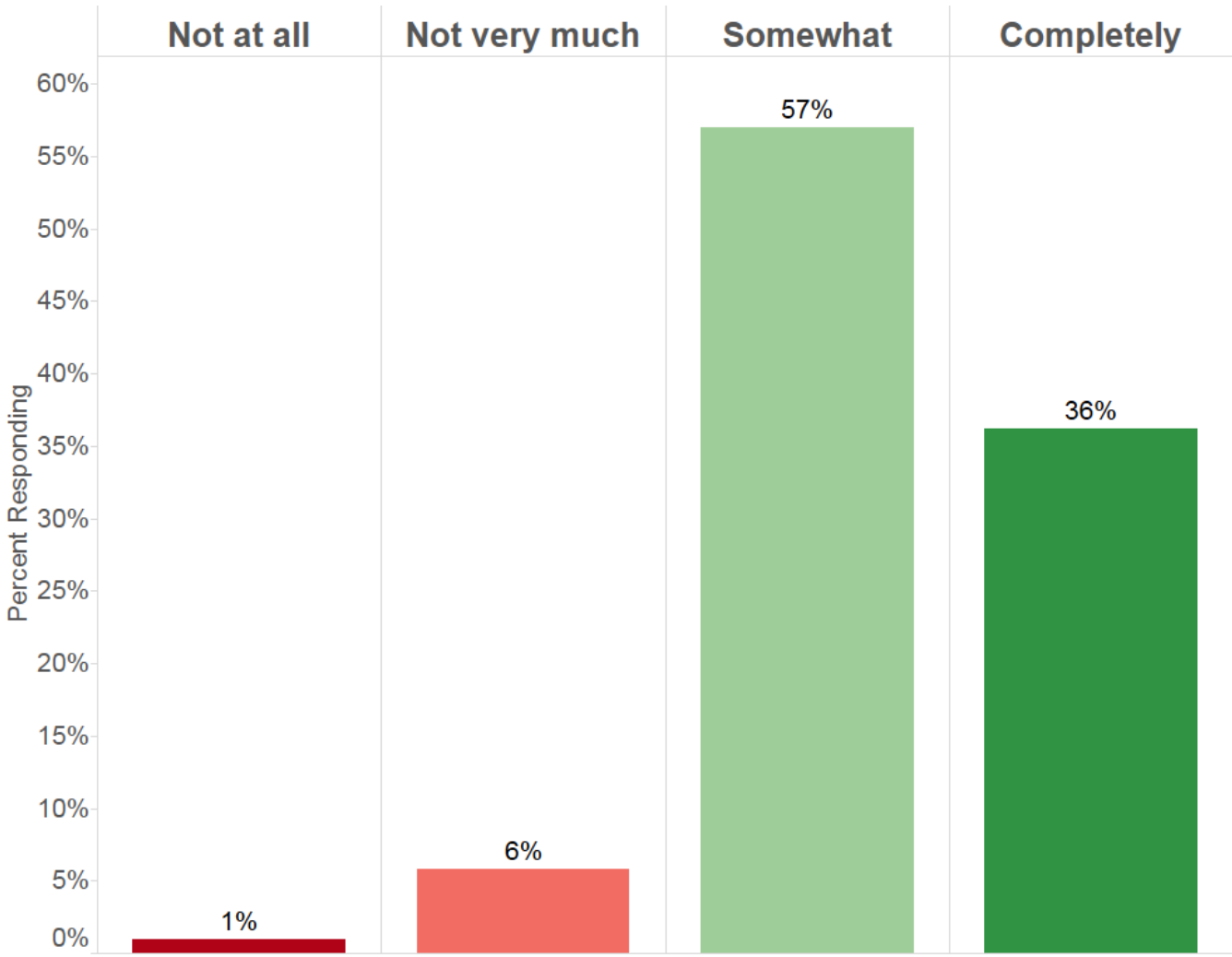
Needs Being Met by Work Situation



Source: Grand County Resident Profile Survey 2014, RRC Associates



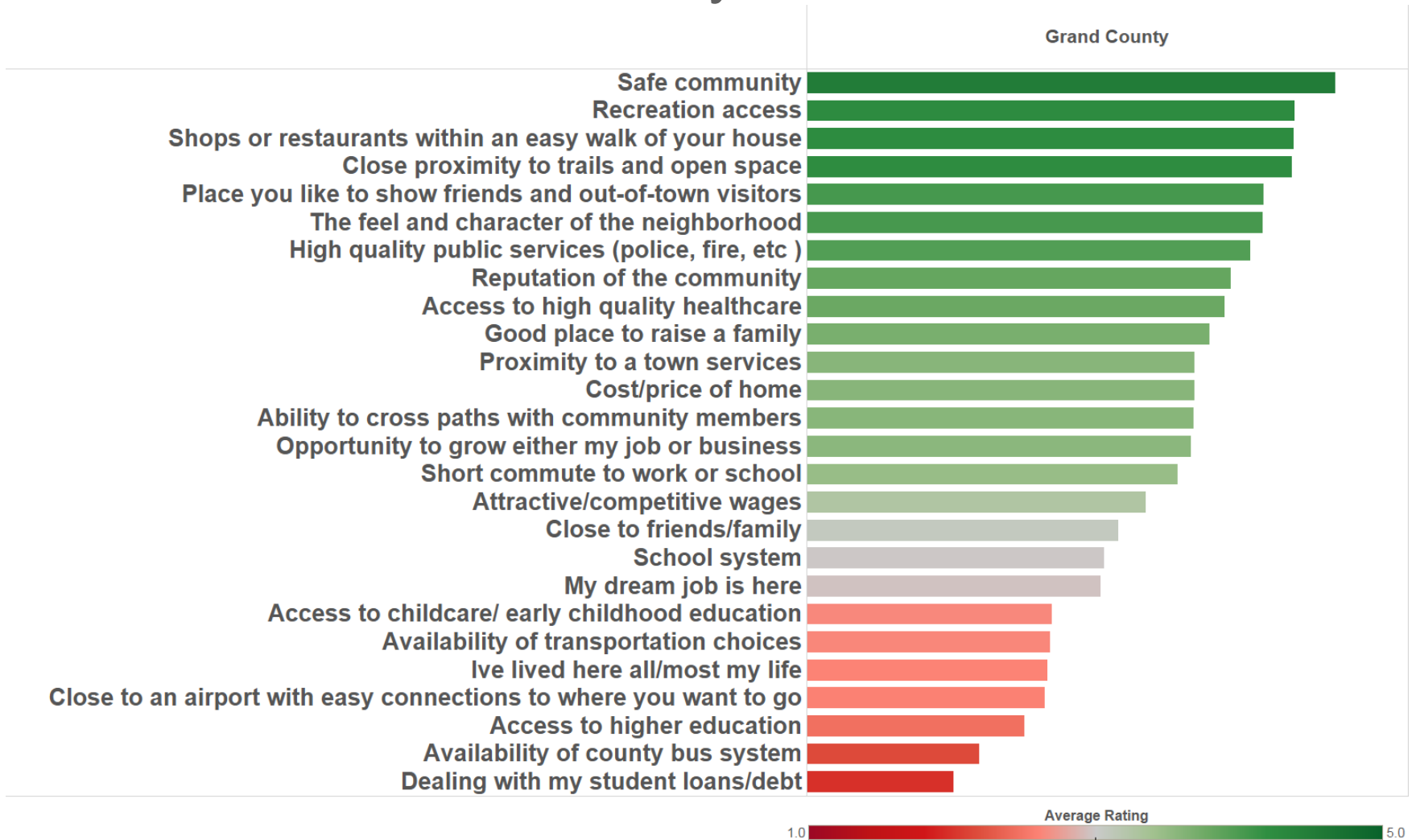
As a Place to Live, How Well Has Your Community Met Your Needs



Source: Grand County Resident Profile Survey, RRC Associates



Importance of Factors to Decision to Locate or Remain in Grand County

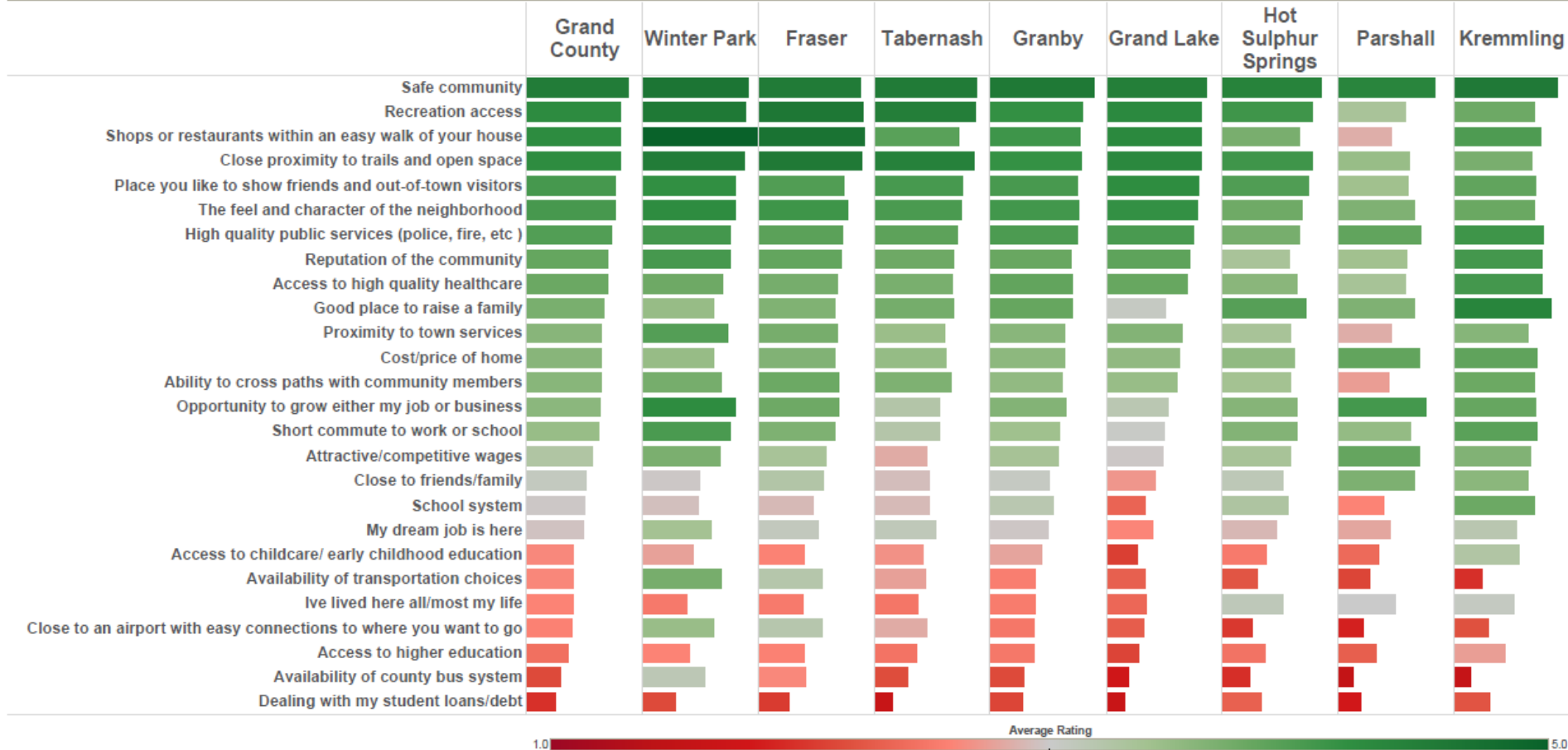


Source: Grand County Resident Profile Survey, RRC Associates



Importance of Factors to Decision to Locate or Remain in Grand County – by Town

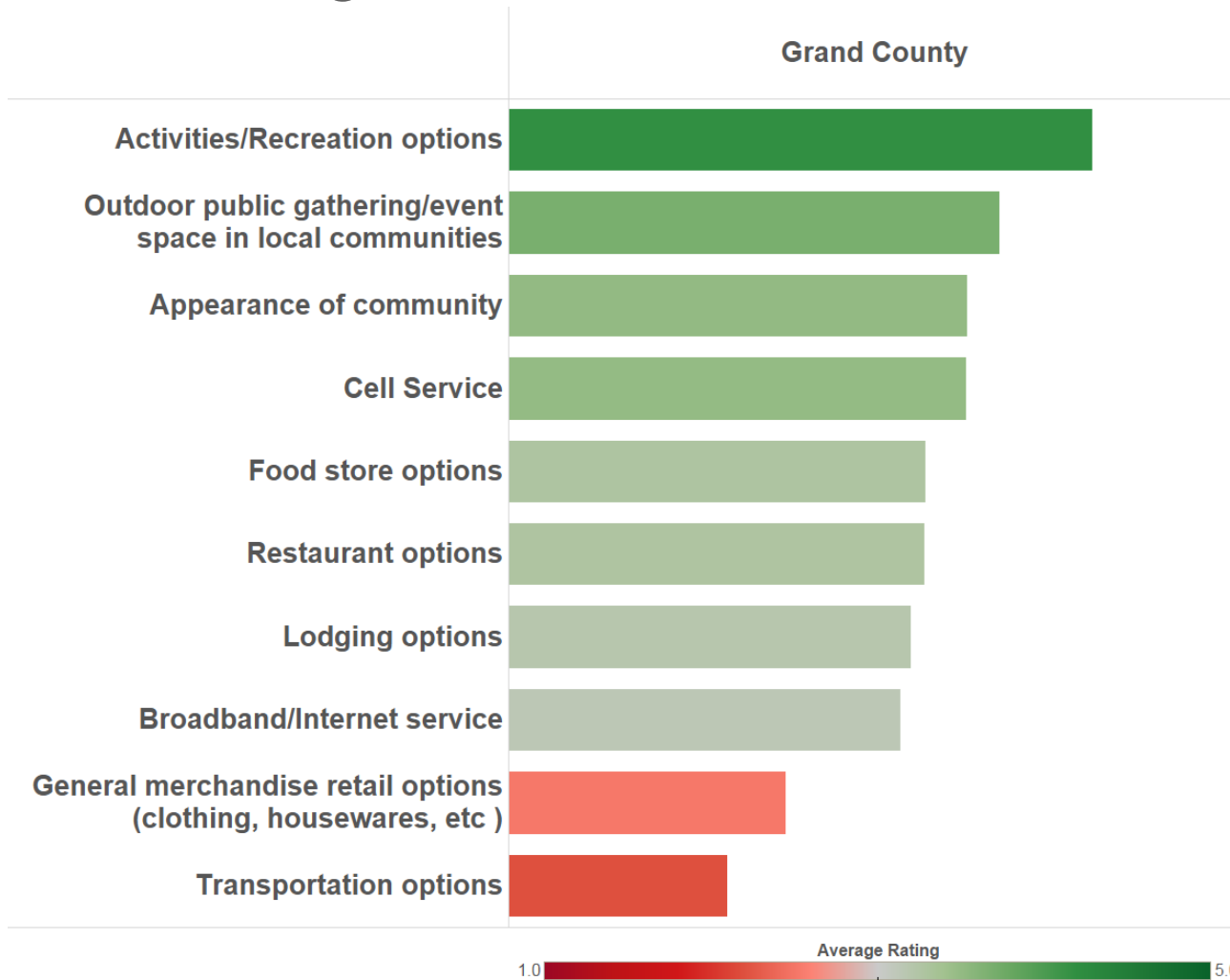
Resident Ratings - How Important Were the Following Factors to Decision to Locate or Remain in Grand County



Source: Grand County Resident Survey 2014, RRC Associates



Satisfaction with Grand County Facilities and Services Ratings

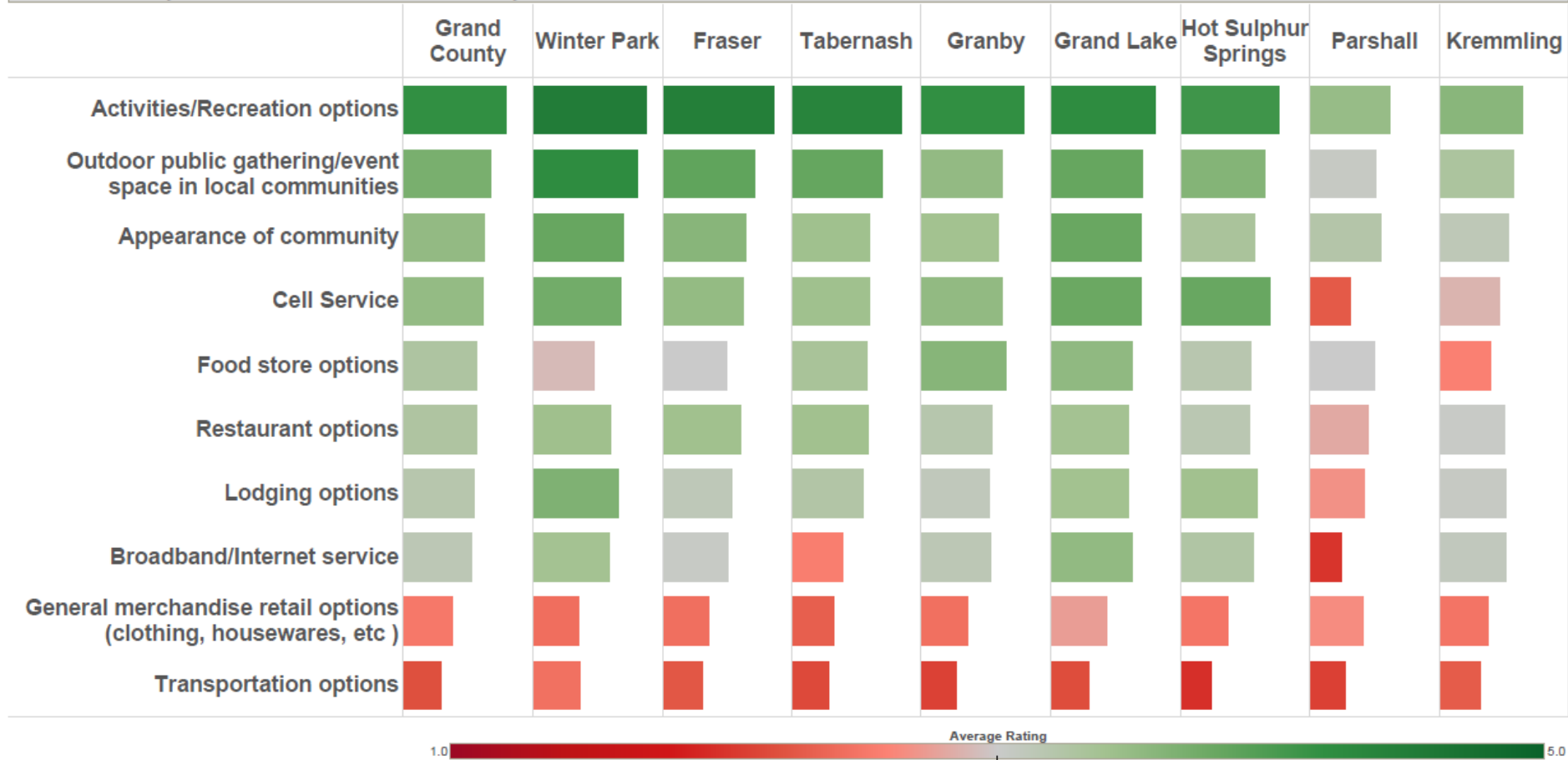


Source: Grand County Resident Profile Survey, RRC Associates



Satisfaction with Grand County Facilities and Services Ratings – by Town

Resident Survey - Satisfaction with Grand County Facilities and Services

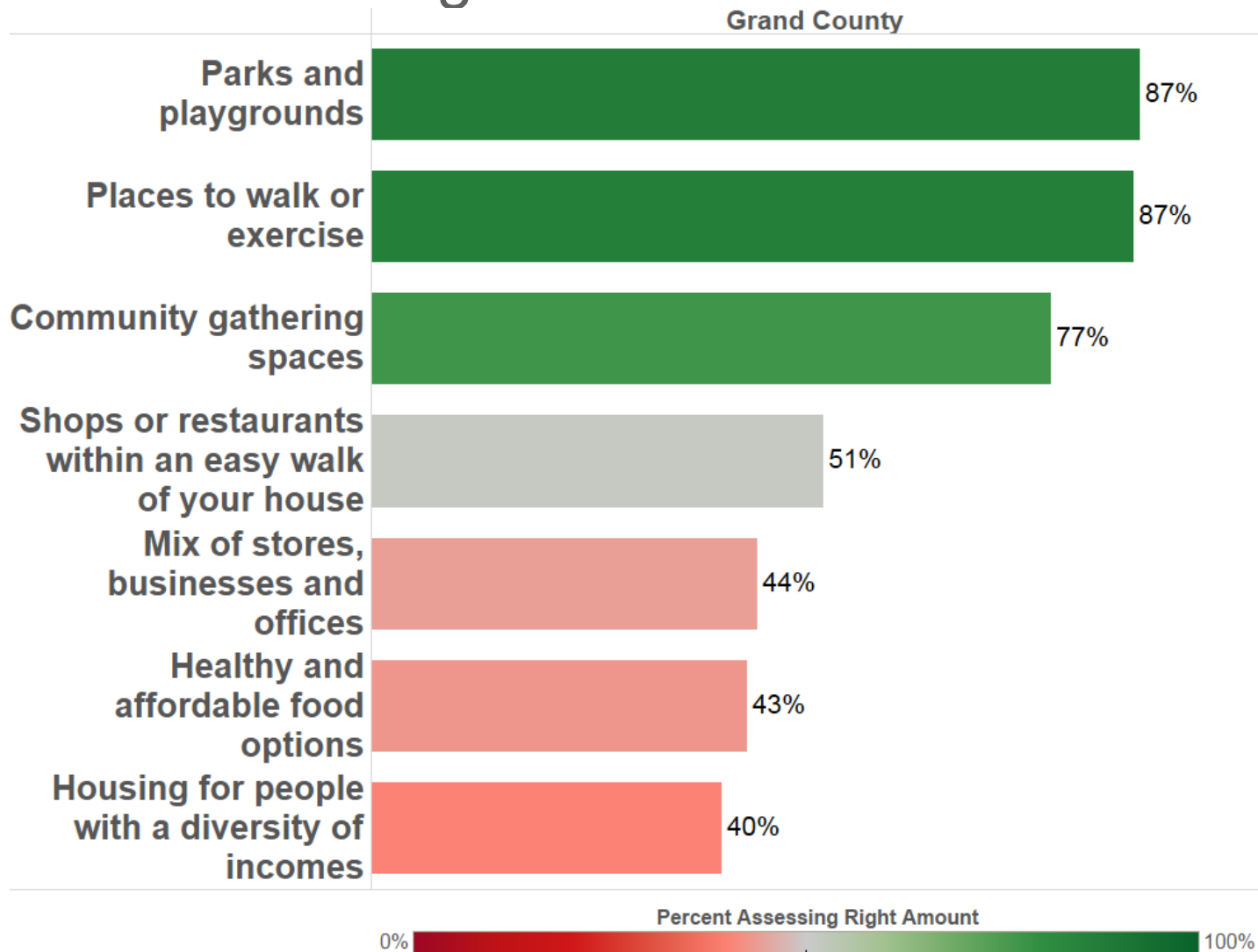


Source: Grand County Resident Profile Survey, RRC Associates





Satisfaction Ratings

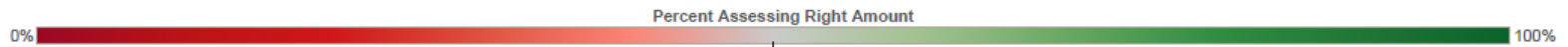
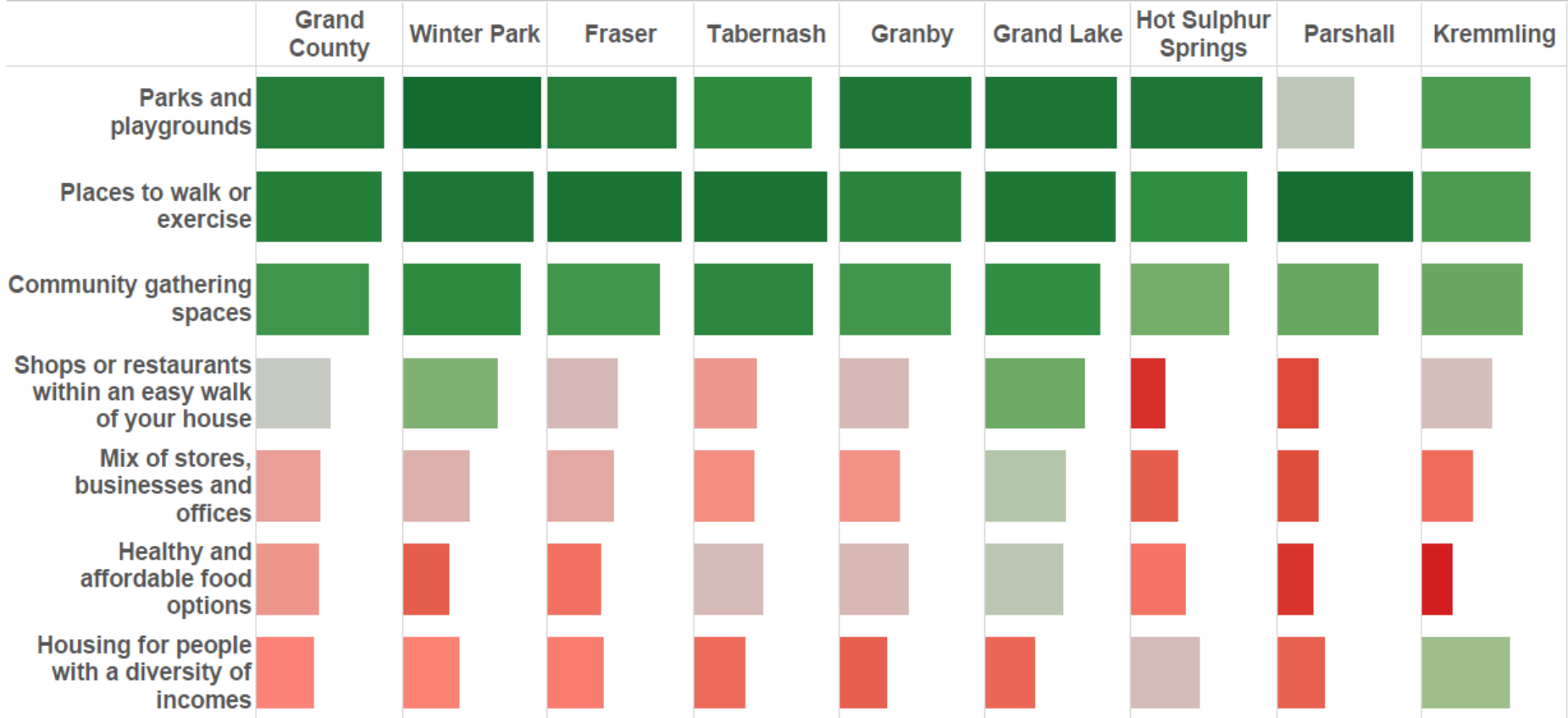


Source: Grand County Resident Profile Survey 2014, RRC Associates



Satisfaction Ratings – by Town

Resident Survey - Do You Think That There Is the Right Amount of the Following in Your Community



Source: Grand County Resident Survey 2014, RRC Associates





For more information
please visit
<http://GrandProfile.org>