

# *Flagstaff Regional Plan –DRAFT COMMUNITY PROFILE*

## **Community Profile**

1. Introduction
2. Demographics:
  - a. Population & Profile Trends - *PEOPLE*
  - b. Housing Trends - *HOUSES*
  - c. Employment Trends - *JOBS*
  - d. Land Inventory and Development Trends - *BUILDINGS*

### **1. Introduction**

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This overview of population and growth trends are provided as background information while reviewing planning elements and discussing goals and policies for the Flagstaff MPO region. To answer the basic question – what are we planning for? How many people are expected to live in, visit and attend university in the Flagstaff MPO Region? How many housing units exist and how many will be needed? How many people equal how many jobs? How many jobs in what sectors are needed for a fiscally sustainable community? This ration of employment sectors means what in ration of land use?

Initial Cliff Notes, notably, ‘Land Use’, ‘Growth Areas’, and ‘Circulation’ all contained some very basic growth projections. These are reiterated here and expanded upon. The Northern Arizona University Rural Policy Institute (RPI) has agreed to synthesize a much more complex data set, namely from Department of Economic Security (DES); ESRI and \_\_\_\_\_ into a format usable by the Regional Plan team and the general public.

This is an incomplete ‘community profile’ and will continue to evolve and be added to during the process.

# Flagstaff Regional Plan –DRAFT COMMUNITY PROFILE

## 2. Demographics

### a. Population & Profile Trends – PEOPLE

Source: DES, Census.gov and ESRI, AZ Board of Regents, Flagstaff CVB

Population is THE driver for many aspects of a community. Sheer numbers DEMAND for housing, jobs and public and private services which in turn drive the amount of land and other resources consumed or preserved. Characteristics of the population such as age will influence the TYPE of services needed. Younger populations require more schools; older populations more medical services. Education can influence employment. Some communities react to trends in population and its characteristics. Others attempt to influence them through a supply-side approach to attract certain demographic niches.

| POPULATION  | City of Flagstaff | Coconino Co. w/ in FMPO | FMPO Total    |
|-------------|-------------------|-------------------------|---------------|
| 2000        | 52,894            | 14,709                  | 67,603        |
| <b>2010</b> | <b>66,879</b>     | <b>17,888</b>           | <b>84,766</b> |
| 2020        | 76,199            | 26,033                  | 102,232       |
| 2030        | 83,746            | 28,607                  | 112,353       |
| 2050        | 96,418            | 32,929                  | 129,347       |

| NAU Population | Total enrollment | NAU Flagstaff campus population | % of City population |
|----------------|------------------|---------------------------------|----------------------|
| 2000           | 19,964           | 14,495                          | 21%                  |
| <b>2010</b>    | <b>25,204</b>    | <b>17,529</b>                   | <b>26%</b>           |
| 2020           | 37,460           | 25,000                          | 33%                  |
| 2030           |                  |                                 |                      |
| 2050           |                  |                                 |                      |

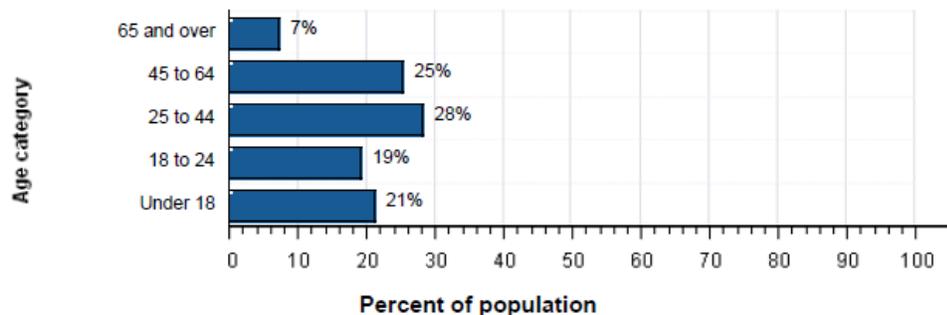
The Board of Regents has indicated that they want Flagstaff campus enrollment to be 25,000 in the year 2020.

| Visitor Population | City of Flagstaff | Northern Arizona Region |
|--------------------|-------------------|-------------------------|
| 2000               | 2,421,331         | 6,106,328               |
| 2010               | 2,593,100         | 6,539,509               |
| 2020               | 2,777,053         | 7,193,460               |
| 2030               | 2,974,057         | 7,912,806               |
| 2050               | 3,410,981         | 9,574,496               |

\*\* Source: 2008 Survey, Arizona Hospitality Research and Resource Center

POPULATION OF Flagstaff, AZ Urbanized Area: In 2008, Flagstaff, AZ Urbanized Area had a total population of 68,000 - 34,000 (51 percent) females and 33,000 (49 percent) males. The median age was 30 years. Twenty-one percent of the population was under 18 years and 7 percent was 65 years and older.

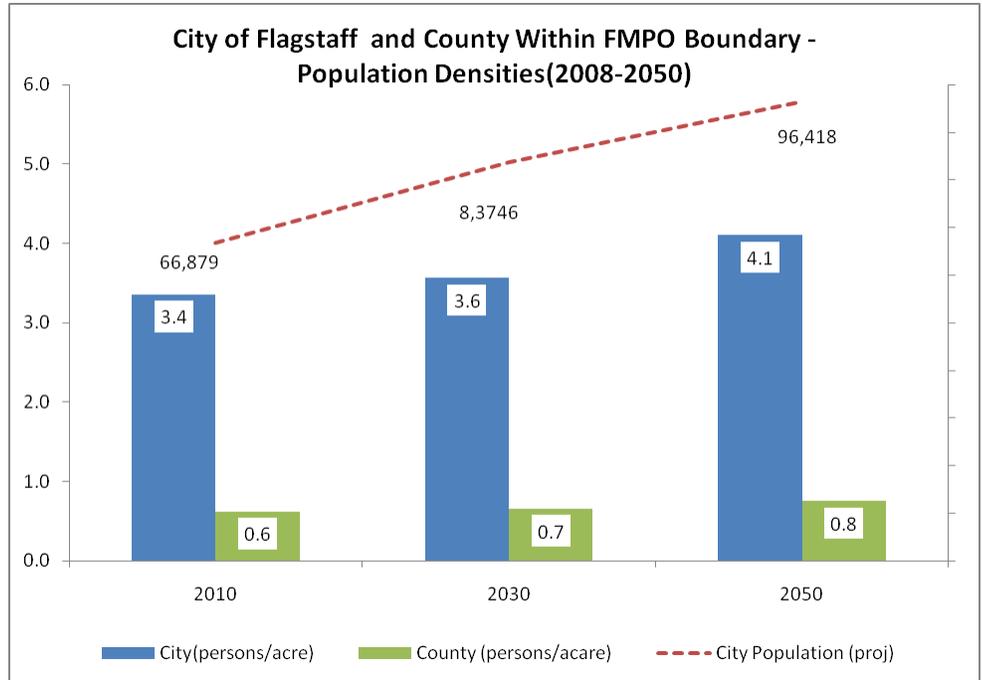
The Age Distribution of People in Flagstaff, AZ Urbanized Area in 2008



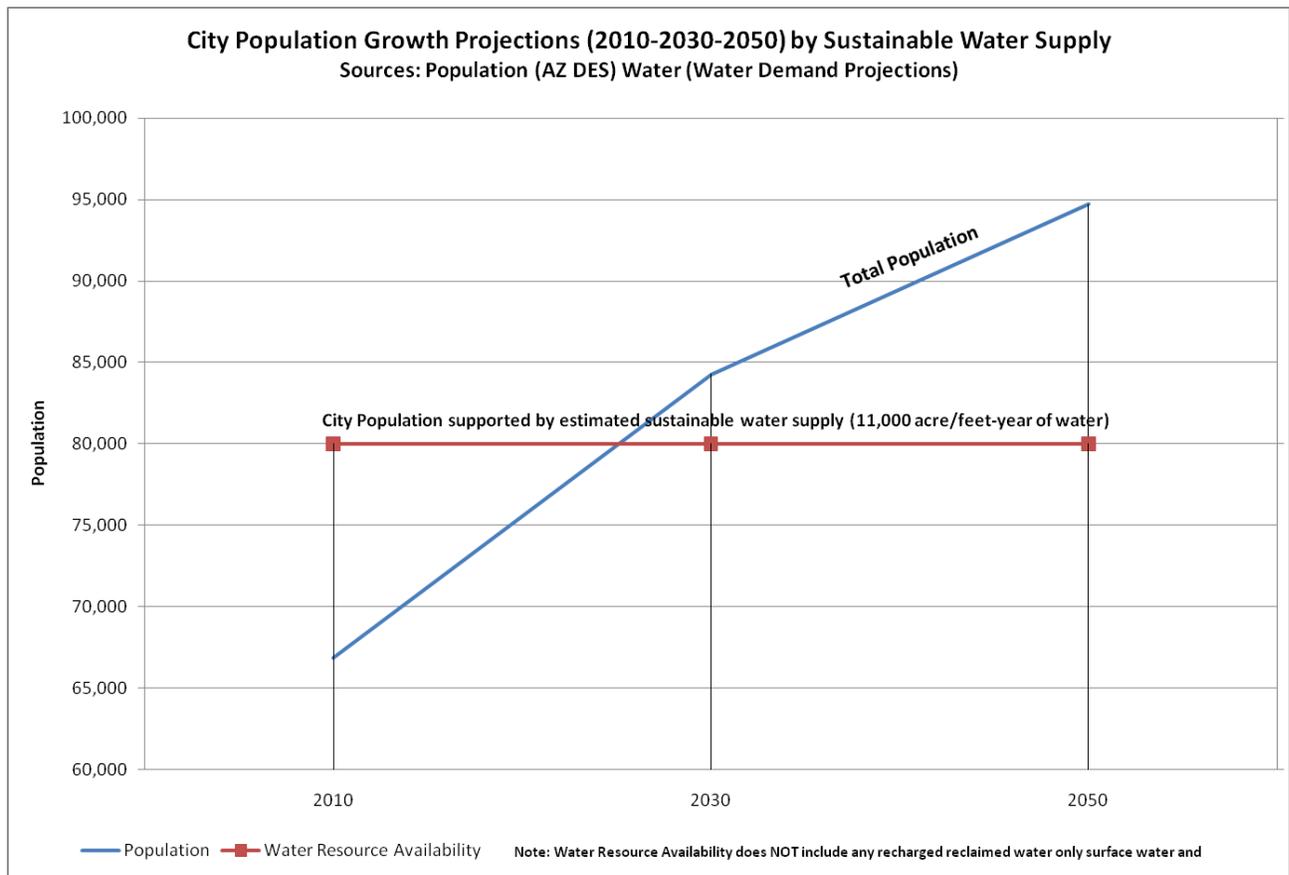
Source: American Community Survey, 2008

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The chart below shows gross density slowly increasing over the next 40 years. Net residential density – land committed solely to residential areas and subtracting out roads, open space and other uses - is higher. Planning and regulation can influence the market to achieve higher or lower densities. Changes in density patterns will influence the sub-area demand for services and the efficiency with which they are used or delivered. Higher



densities are easier to serve with transit and use less water, for instance. Lower densities might be viewed as having “built-in” open space. The table below compares to City population projections to estimated water supply. Demand exceeds supply shortly after 2020. How can we influence supply, demand or both?



# Flagstaff Regional Plan –DRAFT COMMUNITY PROFILE

## Historic Neighborhood Demographics

| Name        | 2000 POPULATION | 2000 POPULATION 0 - 17 | 2000 POPULATION 65+ | 2000 HOUSING UNITS | 2000 HU - VACANT | 2000 HU - OWNER OCCUPIED | 2000 HU - RENTER OCCUPIED | 2008 POPULATION | 2008 HOUSING UNITS | 2008 HU - OWNER OCCUPIED | 2008 HU - RENTER OCCUPIED | 2008 HU - VACANT | 2013 POPULATION | 2013 HOUSING UNITS | 2013 HU - OWNER OCCUPIED | 2013 HU - RENTER OCCUPIED | 2013 HU - VACANT | AREA (ACRES) | Density (dwelling unit per acre) |
|-------------|-----------------|------------------------|---------------------|--------------------|------------------|--------------------------|---------------------------|-----------------|--------------------|--------------------------|---------------------------|------------------|-----------------|--------------------|--------------------------|---------------------------|------------------|--------------|----------------------------------|
| Greenlaw    | 2491            | 837                    | 178                 | 814                | 33               | 502                      | 279                       | 2448            | 828                | 514                      | 267                       | 47               | 2482            | 851                | 509                      | 289                       | 53               | 274.4        | 9                                |
| Pine Knoll  | 1436            | 231                    | 39                  | 552                | 25               | 61                       | 466                       | 2186            | 869                | 102                      | 715                       | 52               | 2552            | 1032               | 111                      | 851                       | 70               | 329.9        | 8                                |
| Plaza Vieja | 846             | 168                    | 42                  | 410                | 26               | 30                       | 354                       | 837             | 422                | 32                       | 348                       | 42               | 836             | 427                | 30                       | 351                       | 46               | 58.5         | 14                               |
| Southside   | 1417            | 216                    | 93                  | 646                | 47               | 128                      | 471                       | 1260            | 633                | 124                      | 415                       | 94               | 1221            | 636                | 115                      | 411                       | 110              | 335.6        | 4                                |
| Sunnyside   | 5469            | 1872                   | 249                 | 1949               | 104              | 484                      | 1361                      | 5593            | 2049               | 529                      | 1368                      | 152              | 5798            | 2151               | 518                      | 1459                      | 174              | 786.8        | 7                                |

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## b. Housing Trends - HOUSING

Housing mix is generally a response to the market. Markets operate within local regulatory, economic and financial environments. The following tables and charts illustrate the high percentage of single family houses in the FMPO region. They also show a high percentage of renters suffering a housing burden. How can the environment be changed to provide a housing mix to address this issue?

| RESIDENTIAL UNITS | City of Flagstaff    | Coconino Co. w/ in FMPO | FMPO Total |
|-------------------|----------------------|-------------------------|------------|
| 2000              | 18,136               |                         |            |
| 2008              | 21,764               |                         |            |
| 2010              | 22,193 <sup>1.</sup> |                         |            |
| 2020              |                      |                         |            |
| 2030              |                      |                         |            |
| 2050              |                      |                         |            |

1. QTR2 Data
2. Note: City of Flagstaff Build-out is estimated at 10,000 more units without forest service land exchange – sale of state land parcels are factored in at current Regional Plan densities. Average housing starts for 2008-2010 are 400-450 per year, including multi-family. Continuing this average per year of new housing, this would take 22 years, or until 2032.
3. These numbers do NOT include NAU housing units;

| Northern Arizona University Housing Units (by number of 'beds') |                                   |
|---|-----------------------------------|
| 2010  | 7,250 [6,695 single; 208 married] |
| 2012  | 8,350                             |

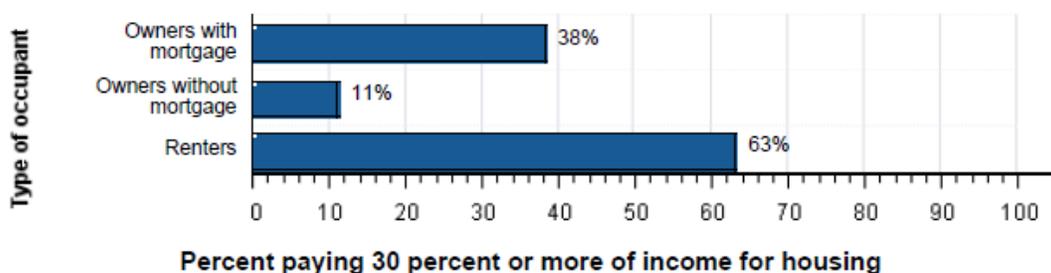
\*\* NAU Planning & Institutional Research: [www.nau.edu/pair](http://www.nau.edu/pair)

The following characteristics were derived from “American Community Survey” using 2008 numbers and encompassing more regional data.

**OCCUPIED HOUSING UNIT CHARACTERISTICS:** In 2008, Flagstaff, AZ Urbanized Area had 26,000 occupied housing units - 14,000 (56 percent) owner occupied and 11,000 (44 percent) renter occupied. Two percent of the households did not have telephone service and 4 percent of the households did not have access to a car, truck, or van for private use. Multi Vehicle households were not rare. Thirty-six percent had two vehicles and another 25 percent had three or more.

**HOUSING COSTS:** The median monthly housing costs for mortgaged owners was \$1,530, nonmortgaged owners \$337, and renters \$953. Thirty-eight percent of owners with mortgages, 11 percent of owners without mortgages, and 63 percent of renters in Flagstaff, AZ Urbanized Area spent 30 percent or more of household income on housing.

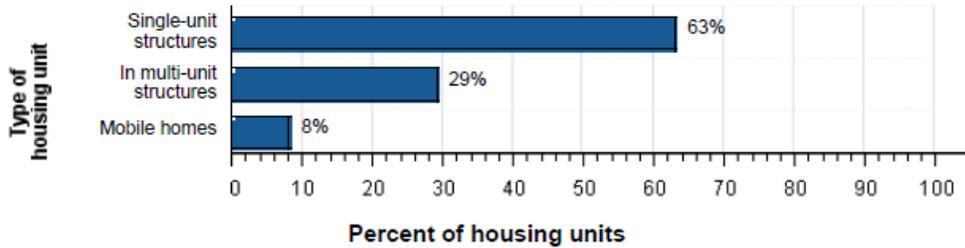
Occupants with a Housing Cost Burden in Flagstaff, AZ Urbanized Area in 2008



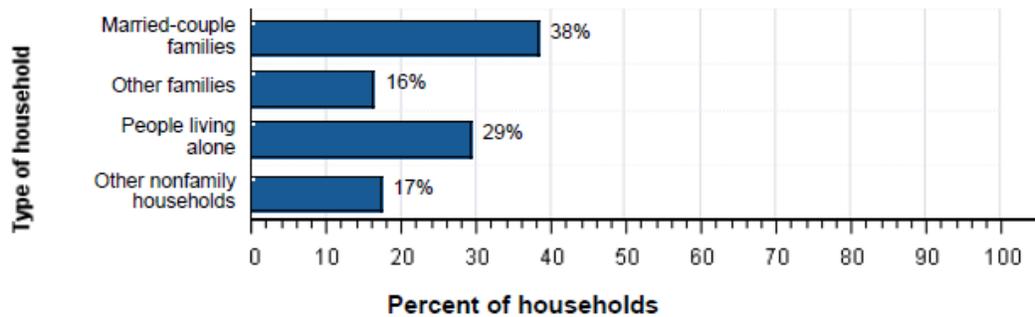
# Flagstaff Regional Plan –DRAFT COMMUNITY PROFILE

HOUSING CHARACTERISTICS: In 2008, Flagstaff, AZ Urbanized Area had a total of 29,000 housing units, 12 percent of which were vacant. Of the total housing units, 63 percent was in single-unit structures, 29 percent was in multi-unit structures, and 8 percent was mobile homes. Thirty-nine percent of the housing units were built since 1990.

The Types of Housing Units in Flagstaff, AZ Urbanized Area in 2008



The Types of Households in Flagstaff, AZ Urbanized Area in 2008



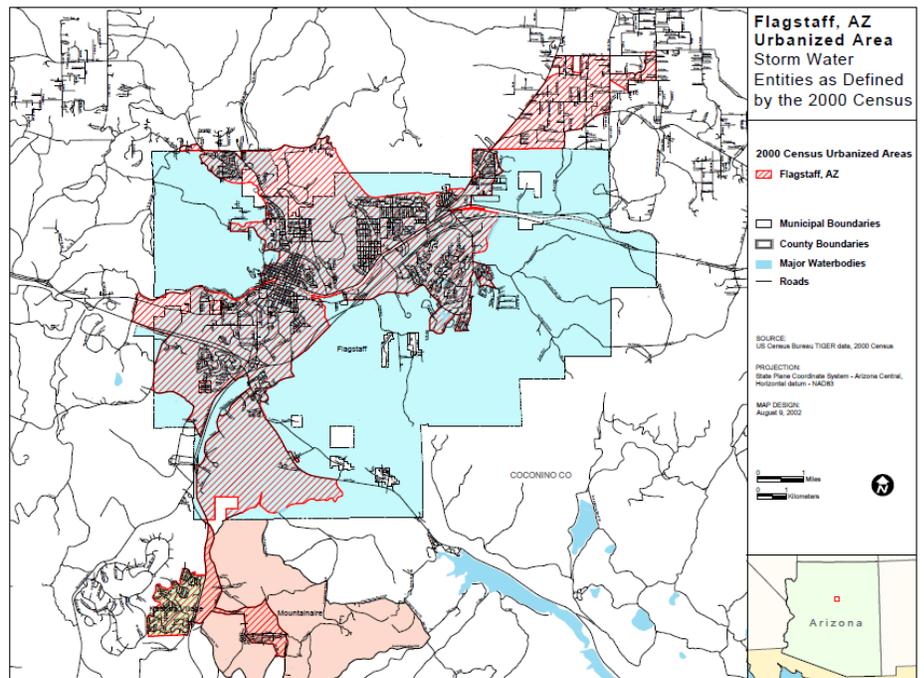
Source: American Community Survey, 2008

**Flagstaff Total housing Units**  
**YEAR STRUCTURE BUILT**

**26,162**

|                       |       |     |
|-----------------------|-------|-----|
| Built 2005 or later   | 1,153 | 4%  |
| Built 2000 to 2004    | 4,129 | 16% |
| Built 1990 to 1999    | 5,072 | 19% |
| Built 1980 to 1989    | 5,882 | 22% |
| Built 1970 to 1979    | 4,672 | 18% |
| Built 1960 to 1969    | 2,075 | 8%  |
| Built 1950 to 1959    | 1,937 | 7%  |
| Built 1940 to 1949    | 507   | 2%  |
| Built 1939 or earlier | 735   | 3%  |

\* Source: Census.gov



Source: <http://www.azdeq.gov/environ/water/permits/download/flagstaff.pdf>

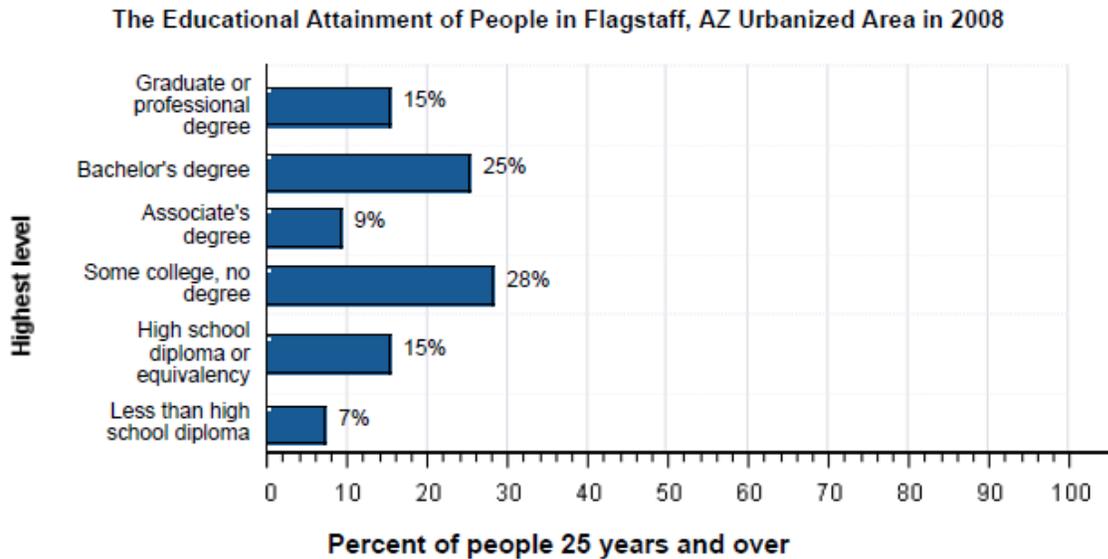
# Flagstaff Regional Plan –DRAFT COMMUNITY PROFILE

## c. Employment Trends – JOBS

Employment trends and employment location trends, like population, influence the DEMAND for services and the efficiency with which they are provided. Like housing, concentrations of employees are easier to serve with transit. TYPES of employment – occupation and industry mix – will influence salary and wages which affect the quantity and quality of goods and services consumed in and delivered to an area. The location decision of major employers is influenced by many factors that a community may wish to address: transportation, tax policies, workforce development, and land availability to name a few.

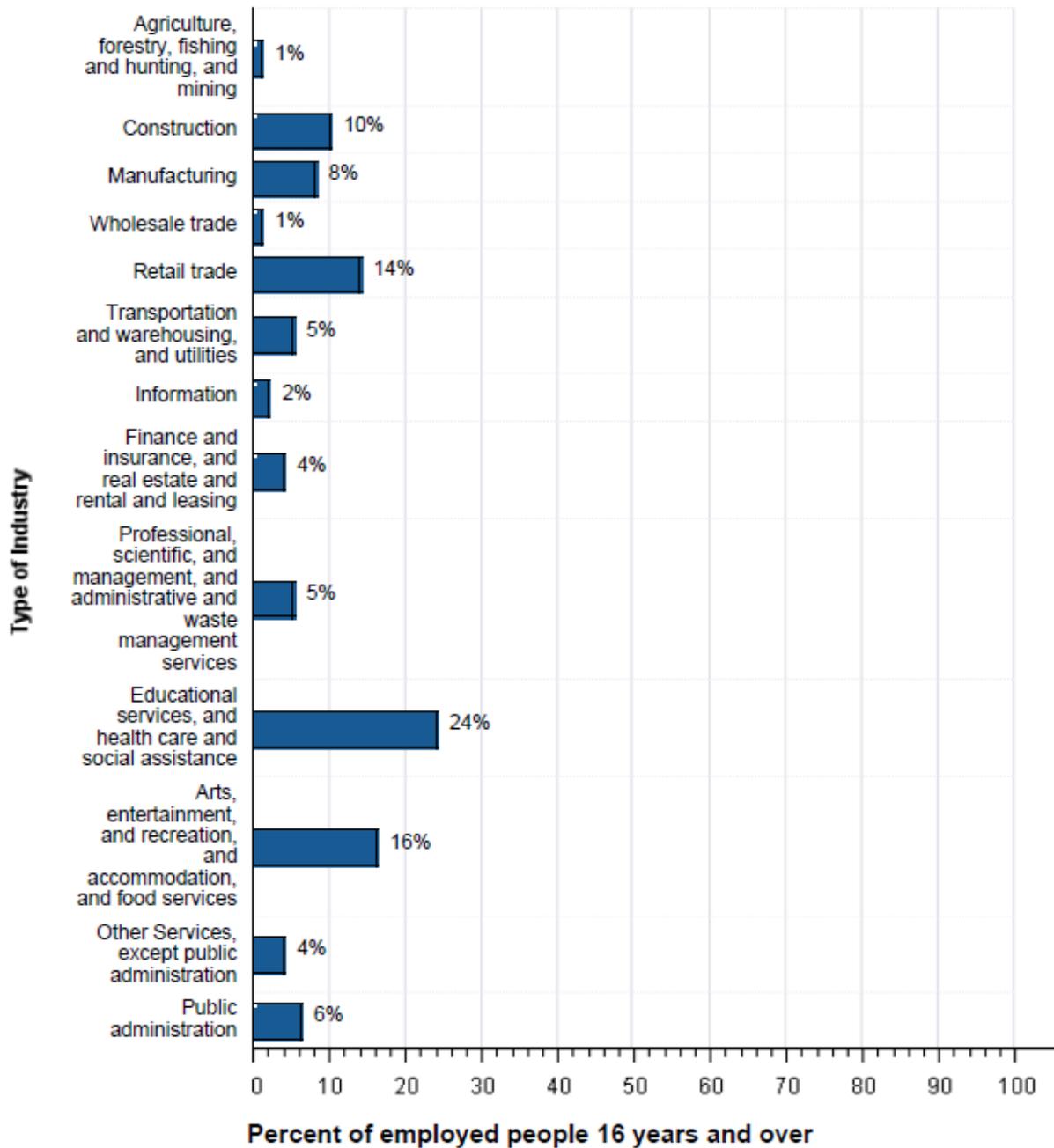
The median age of Flagstaff’s population is about 27 years. The median income for a household is about \$37,000, and the **median income for a family is about \$48,000**. As a college town, Flagstaff’s population is considerably more educated than the U.S. average: Nearly 90 percent of the population has a high school diploma or higher (the national average is 80 percent). Nearly 40 percent has a Bachelors degree or higher, compared to the national average of 24 percent.

<http://www.cityofinnovation.com/docs/flagstaffFacts.pdf>



Source: American Community Survey, 2008

# Flagstaff Regional Plan –DRAFT COMMUNITY PROFILE



Source: American Community Survey, 2008

# Flagstaff Regional Plan –DRAFT COMMUNITY PROFILE

## Employed Residents by Industry (SIC Classification)

|  |               | Flagstaff,<br>AZ - UT<br>MSA | Central<br>city of:<br>Flagstaff<br>city, AZ | Suburbs* | Flagstaff,<br>AZ - UT<br>MSA | Central<br>city of:<br>Flagstaff<br>city, AZ | Suburbs* |
|--|---------------|------------------------------|--|----------|------------------------------|--|----------|
| <b>TOTAL</b>   | <b>1980</b>   | 31,790                       | 16,227                                       | 15,563   | 100                          | 100  | 100      |
|  | <b>1990</b>   | 43,951                       | 22,911                                       | 21,040   | 100                          | 100  | 100      |
|  | <b>2000**</b> | 58,175                       | 29,223                                       | 28,952   | 100                          | 100  | 100      |
|  | <b>2010</b>   | 58,100                       |  |          |                              |  |          |
|  |               |                              |  |          |                              |  |          |
| <b>Agriculture<br/>and Mining</b>                                | <b>1980</b>   | 1,263                        | 446  | 817      | 4                            | 2.7  | 5.2      |
|  | <b>1990</b>   | 1,515                        | 445  | 1,070    | 3.4                          | 1.9  | 5.1      |
|  | <b>2000**</b> | 1,246                        | 407  | 839      | 2.1                          | 1.4  | 2.9      |
|  |               |                              |  |          |                              |  |          |
| <b>Construction</b>  | <b>1980</b>   | 1,960                        | 788  | 1,172    | 6.2                          | 4.9  | 7.5      |
|  | <b>1990</b>   | 3,203                        | 1,299  | 1,904    | 7.3                          | 5.7  | 9        |
|  | <b>2000**</b> | 4,422                        | 1,548  | 2,874    | 7.6                          | 5.3  | 9.9      |
|  |               |                              |  |          |                              |  |          |
| <b>Manufacturing</b>   | <b>1980</b>   | 2,378                        | 1,322  | 1,056    | 7.5                          | 8.1  | 6.8      |
|  | <b>1990</b>   | 3,045                        | 1,559  | 1,486    | 6.9                          | 6.8  | 7.1      |
|  | <b>2000**</b> | 3,318                        | 1,710  | 1,608    | 5.7                          | 5.9  | 5.6      |
|  |               |                              |  |          |                              |  |          |
| <b>Transportation<br/>Communication<br/>and Public Utilities</b> | <b>1980</b>   | 2,676                        | 935  | 1,741    | 8.4                          | 5.8  | 11.2     |
|  | <b>1990</b>   | 3,570                        | 1,336  | 2,234    | 8.1                          | 5.8  | 10.6     |
|  | <b>2000**</b> | 3,548                        | 1,162  | 2,386    | 6.1                          | 4  | 8.2      |
|  |               |                              |  |          |                              |  |          |
| <b>Wholesale and<br/>Retail Trade</b>                            | <b>1980</b>   | 7,781                        | 4,697  | 3,084    | 24.5                         | 28.9   | 19.8     |
|  | <b>1990</b>   | 10,679                       | 6,145  | 4,534    | 24.3                         | 26.8   | 21.5     |
|  | <b>2000**</b> | 15,064                       | 7,845  | 7,219    | 25.9                         | 26.8   | 24.9     |
|  |               |                              |  |          |                              |  |          |
| <b>Finance<br/>Insurance<br/>and Real Estate</b>                 | <b>1980</b>   | 948                          | 539  | 409      | 3                            | 3.3  | 2.6      |
|  | <b>1990</b>   | 1,554                        | 969  | 585      | 3.5                          | 4.2  | 2.8      |
|  | <b>2000**</b> | 2,047                        | 1,079  | 968      | 3.5                          | 3.7  | 3.3      |
|  |               |                              |  |          |                              |  |          |
| <b>Business<br/>and Repair<br/>Services</b>                      | <b>1980</b>   | 843                          | 484  | 359      | 2.7                          | 3  | 2.3      |
|  | <b>1990</b>   | 1,778                        | 970  | 808      | 4                            | 4.2  | 3.8      |
|  | <b>2000**</b> | 3,071                        | 1,604  | 1,467    | 5.3                          | 5.5  | 5.1      |
|  |               |                              |  |          |                              |  |          |
| <b>Personal<br/>Services</b>                                     | <b>1980</b>   | 2,368                        | 1,086  | 1,282    | 7.4                          | 6.7  | 8.2      |
|  | <b>1990</b>   | 3,998                        | 1,738  | 2,260    | 9.1                          | 7.6  | 10.7     |
|  | <b>2000**</b> | 6,418                        | 3,242  | 3,176    | 11                           | 11.1   | 11       |
|  |               |                              |  |          |                              |  |          |
| <b>Professional<br/>Services</b>                                 | <b>1980</b>   | 8,320                        | 4,826  | 3,494    | 26.2                         | 29.7   | 22.5     |
|  | <b>1990</b>   | 11,531                       | 6,971  | 4,560    | 26.2                         | 30.4   | 21.7     |
|  | <b>2000**</b> | 15,077                       | 8,833  | 6,244    | 25.9                         | 30.2   | 21.6     |
|  |               |                              |  |          |                              |  |          |
| <b>Public<br/>Administration</b>                                 | <b>1980</b>   | 3,253                        | 1,104  | 2,149    | 10.2                         | 6.8  | 13.8     |
|  | <b>1990</b>   | 3,078                        | 1,479  | 1,599    | 7                            | 6.5  | 7.6      |
|  | <b>2000**</b> | 3,964                        | 1,793  | 2,171    | 6.8                          | 6.1  | 7.5      |