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2009 Development Monitoring Report

Report Number 06-2010

# 2009 Development Monitoring Report For Ada and Canyon Counties

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## Introduction

The 2009 Development Monitoring Report provides an overview of development trends within Ada and Canyon Counties. The Community Planning Association of Southwest Idaho (COMPASS) has compiled similar reports for Ada County since 1980 and for Canyon County since 1999. The report also compares residential development activity with forecasted household growth from the region's long-term transportation plan, *Communities in Motion*. Residential activity in the 2009 Development Monitoring Report is compared forecasts used in the long range transportation plan adopted in August 2006. The plan is updated every four years. The 25-year forecast developed for the long-range plan is divided into 5-year increments. Details of those forecasts are available on the COMPASS website at www.compassidaho.org/prodserv/demo-forecasts.htm.

The primary source of data for the Development Monitoring Report is building permits collected from the cities and counties within the region. Another important source of data is preliminary plats, which are subdivisions that have received preliminary approval for development but have not received final approval, and therefore have not been recorded. Preliminary plats represent areas that have a strong probability of future growth.

Building permits and lots within preliminary plats are organized according to the following geographies for the purposes of this report:

**City Limits** are the official jurisdictional and taxing boundaries of the cities. City limit boundaries tend to expand year after year as city councils approve property annexations. Building permits in this report reflect the city limit boundaries at the time of reporting.

**Demographic Areas** are collections of multiple Transportation Analysis Zones (TAZ) that roughly follow city areas and sub-areas within cities. A TAZ is a special area delineated by state and/or local transportation officials for tabulating traffic-related data. City limits boundaries are continuously expanding. Demographic area and TAZ boundaries stay the same for about 10 years and therefore provide a good geography by which to analyze growth trends within a constant boundary over a range of time.

The 2009 Development Monitoring Report, previous year reports, and other development-related data are available on the COMPASS website at <u>www.compassidaho.org/prodserv/gtsm-</u><u>devmonitoring.htm</u>.

Custom data analysis for more specific areas is available upon request.

Any questions or concerns regarding the report may be directed to Nathan Dale at 855-2558, ext. 233 or email <u>ndale@compassidaho.org</u>.

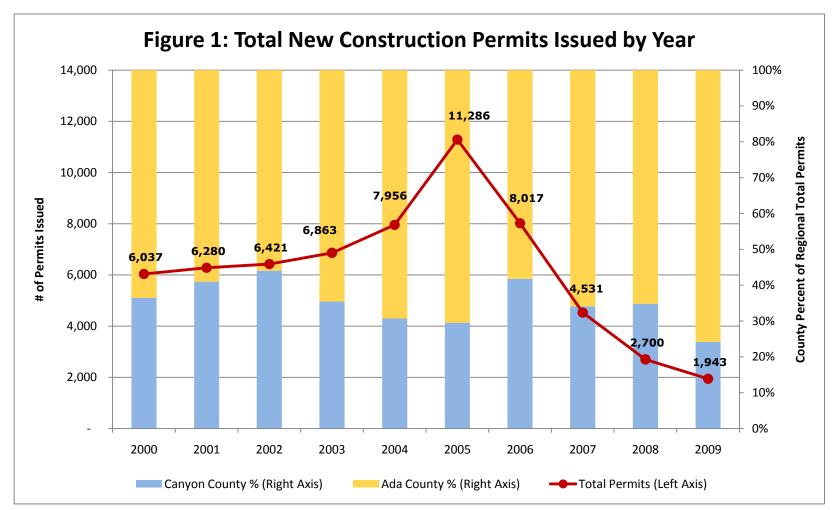


	Table 1: Total New Construction Permits Issued by Year													
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009				
Ada County	3,835	3,708	3,593	4,432	5,515	7,953	4,667	2,987	1,760	1,473				
Canyon County	2,202	2,572	2,828	2,431	2,441	3,333	3,350	1,544	940	470				
Ada County %	63%	59%	56%	65%	69%	70%	58%	66%	65%	76%				
Canyon County %	37%	41%	44%	35%	31%	30%	42%	34%	35%	24%				
Total Permits	6,037	6,280	6,421	6,863	7,956	11,286	8,017	4,531	2,700	1,943				

City	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Boise	1,302	1,823	1,209	1,120	813	1,185	877	1,088	311	382
Caldwell	508	554	703	652	615	999	1,182	1,077	404	254
Eagle	455	361	267	421	483	530	258	76	81	31
Garden City	116	103	196	88	69	70	53	113	38	3
Greenleaf	1	4	0	0	6	3	0	3	0	0
Kuna	343	321	410	232	227	563	296	359	230	236
Melba	2	20	4	6	0	3	1	3	2	1
Meridian	760	921	950	1,765	2,552	3,314	1,688	849	782	660
Middleton	49	42	129	99	104	137	159	91	83	28
Nampa	1,249	1,384	1,623	1,287	1,445	1,383	1,333	498	202	82
Notus	1	7	6	3	12	8	9	24	0	0
Parma	0	8	6	14	11	11	11	21	7	7
Star	74	43	46	102	143	548	300	124	26	29
Wilder	5	0	1	4	3	20	27	15	2	1
Ada Unincorporated	840	931	876	1,036	1,188	1,617	1,209	597	384	286
Canyon Unincorporated	417	500	428	428	419	648	561	357	160	87
Ada County Subtotal	3,890	4,503	3,954	4,764	5,475	7,827	4,681	3,206	1,852	1,627
Canyon County Subtotal	2,232	2,519	2,900	2,493	2,615	3,212	3,283	2,089	860	460
Total New Residential Units	6,122	7,022	6,854	7,257	8,090	11,039	7,964	5,295	2,712	2,087
Percent Multi & Manufactured	14%	24%	16%	17%	15%	8%	15%	31%	20%	20%

# Table 2: New Residential Units by City Limits

## Table 3: New Residential Units by City Limits as a Percentage of Regional Total

City	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Boise	21.3%	26.0%	17.6%	15.4%	10.0%	10.7%	11.0%	20.5%	11.5%	18.3%
Caldwell	8.3%	7.9%	10.3%	9.0%	7.6%	9.0%	14.8%	20.3%	14.9%	12.2%
Eagle	7.4%	5.1%	3.9%	5.8%	6.0%	4.8%	3.2%	1.4%	3.0%	1.5%
Garden City	1.9%	1.5%	2.9%	1.2%	0.9%	0.6%	0.7%	2.1%	1.4%	0.1%
Greenleaf	0.0%	0.1%	0.0%	0.0%	0.1%	0.0%	0.0%	0.1%	0.0%	0.0%
Kuna	5.6%	4.6%	6.0%	3.2%	2.8%	5.1%	3.7%	6.8%	8.5%	11.3%
Melba	0.0%	0.3%	0.1%	0.1%	0.0%	0.0%	0.0%	0.1%	0.1%	0.0%
Meridian	12.4%	13.1%	13.9%	24.3%	31.5%	30.0%	21.2%	16.0%	28.8%	31.6%
Middleton	0.8%	0.6%	1.9%	1.4%	1.3%	1.2%	2.0%	1.7%	3.1%	1.3%
Nampa	20.4%	19.7%	23.7%	17.7%	17.9%	12.5%	16.7%	9.4%	7.4%	3.9%
Notus	0.0%	0.1%	0.1%	0.0%	0.1%	0.1%	0.1%	0.5%	0.0%	0.0%
Parma	0.0%	0.1%	0.1%	0.2%	0.1%	0.1%	0.1%	0.4%	0.3%	0.3%
Star	1.2%	0.6%	0.7%	1.4%	1.8%	5.0%	3.8%	2.3%	1.0%	1.4%
Wilder	0.1%	0.0%	0.0%	0.1%	0.0%	0.2%	0.3%	0.3%	0.1%	0.0%
Ada Unincorporated	13.7%	13.3%	12.8%	14.3%	14.7%	14.6%	15.2%	11.3%	14.2%	13.7%
Canyon Unincorporated	6.8%	7.1%	6.2%	5.9%	5.2%	5.9%	7.0%	6.7%	5.9%	4.2%
Ada County Subtotal	63.5%	64.1%	57.7%	65.6%	67.7%	70.9%	58.8%	60.5%	68.3%	78.0%
Canyon County Subtotal	36.5%	35.9%	42.3%	34.4%	32.3%	29.1%	41.2%	39.5%	31.7%	22.0%
Total New Residential Units	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

City	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Boise	2,264	1,685	853	1,384	1,037	1,141	1,654	1,326	577	196
Caldwell	0	0	0	0	0	242	204	853	33	14
Eagle	112	222	109	221	191	282	384	303	159	5
Garden City	164	244	24	118	75	29	70	0	26	24
Greenleaf	0	0	91	0	0	0	0	0	0	0
Kuna	8	171	45	0	56	106	119	94	62	0
Melba	0	0	0	0	0	0	0	0	0	0
Meridian	154	624	292	938	976	1,419	2,172	1,194	849	197
Middleton	0	0	36	2	21	6	11	25	8	0
Nampa	0	12	0	0	0	1,112	1,337	1,172	614	262
Notus	0	0	5	0	0	0	0	0	0	0
Parma	0	18	2	3	1	0	11	0	0	0
Star	4	0	1	13	76	41	25	13	6	20
Wilder	0	0	0	0	0	49	1	5	0	59
Ada Unincorporated	290	9	171	2	168	252	68	334	35	19
Canyon Unincorporated	0	0	0	0	0	52	28	169	44	88
Ada County Subtotal	2,995	2,954	1,494	2,677	2,578	3,271	4,493	3,263	1,714	461
Canyon County Subtotal	0	30	134	6	22	1,461	1,591	2,223	700	423
Regional Total	2,995	2,984	1,628	2,682	2,600	4,731	6,084	5,486	2,414	884

Table 4: New Non-Residential Square Feet (In thousands) by City Limits

### Table 5: New Non-Residential Square Feet by City Limits as a Percentage of Regional Total

City	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Boise	75.6%	56.5%	52.4%	51.6%	39.9%	24.1%	27.2%	24.2%	23.9%	22.2%
Caldwell	0.0%	0.0%	0.0%	0.0%	0.0%	5.1%	3.4%	15.5%	1.4%	1.6%
Eagle	3.7%	7.5%	6.7%	8.2%	7.3%	6.0%	6.3%	5.5%	6.6%	0.6%
Garden City	5.5%	8.2%	1.5%	4.4%	2.9%	0.6%	1.2%	0.0%	1.1%	2.7%
Greenleaf	0.0%	0.0%	5.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Kuna	0.3%	5.7%	2.8%	0.0%	2.2%	2.2%	2.0%	1.7%	2.6%	0.0%
Melba	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Meridian	5.2%	20.9%	17.9%	35.0%	37.5%	30.0%	35.7%	21.8%	35.2%	22.3%
Middleton	0.0%	0.0%	2.2%	0.1%	0.8%	0.1%	0.2%	0.5%	0.3%	0.0%
Nampa	0.0%	0.4%	0.0%	0.0%	0.0%	23.5%	22.0%	21.4%	25.4%	29.6%
Notus	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Parma	0.0%	0.6%	0.1%	0.1%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%
Star	0.1%	0.0%	0.1%	0.5%	2.9%	0.9%	0.4%	0.2%	0.2%	2.2%
Wilder	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.1%	0.0%	6.7%
Ada Unincorporated	9.7%	0.3%	10.5%	0.1%	6.4%	5.3%	1.1%	6.1%	1.5%	2.1%
Canyon Unincorporated	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.5%	3.1%	1.8%	10.0%
Ada County Subtotal	100.0%	99.0%	91.8%	99.8%	99.2%	69.1%	73.8%	59.5%	71.0%	52.2%
Canyon County Subtotal	0.0%	1.0%	8.2%	0.2%	0.8%	30.9%	26.2%	40.5%	29.0%	47.8%
Regional Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

#### Notes

Not all permits for non-residential new construction contain square footage data

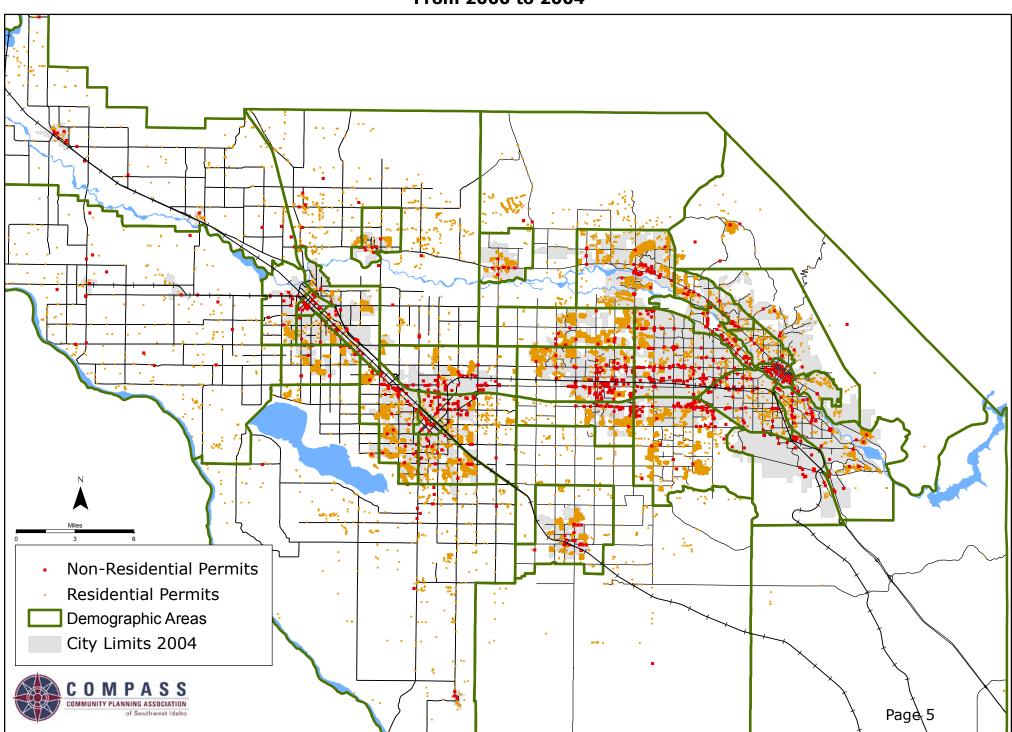


Figure 2: Total New Construction Permits Issued From 2000 to 2004

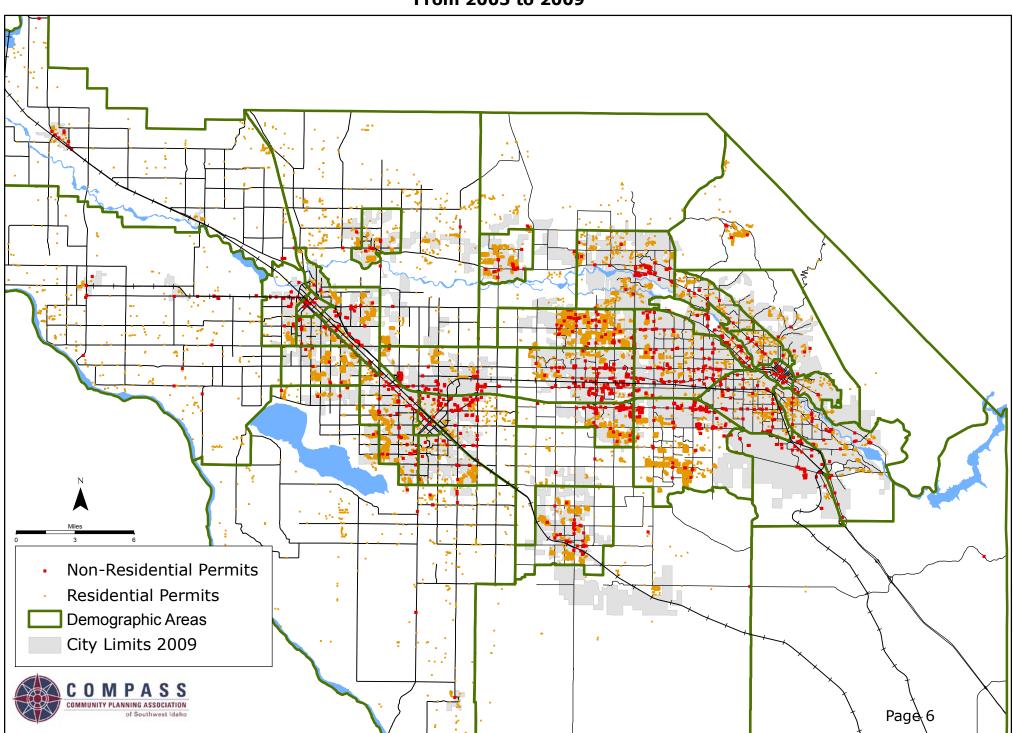
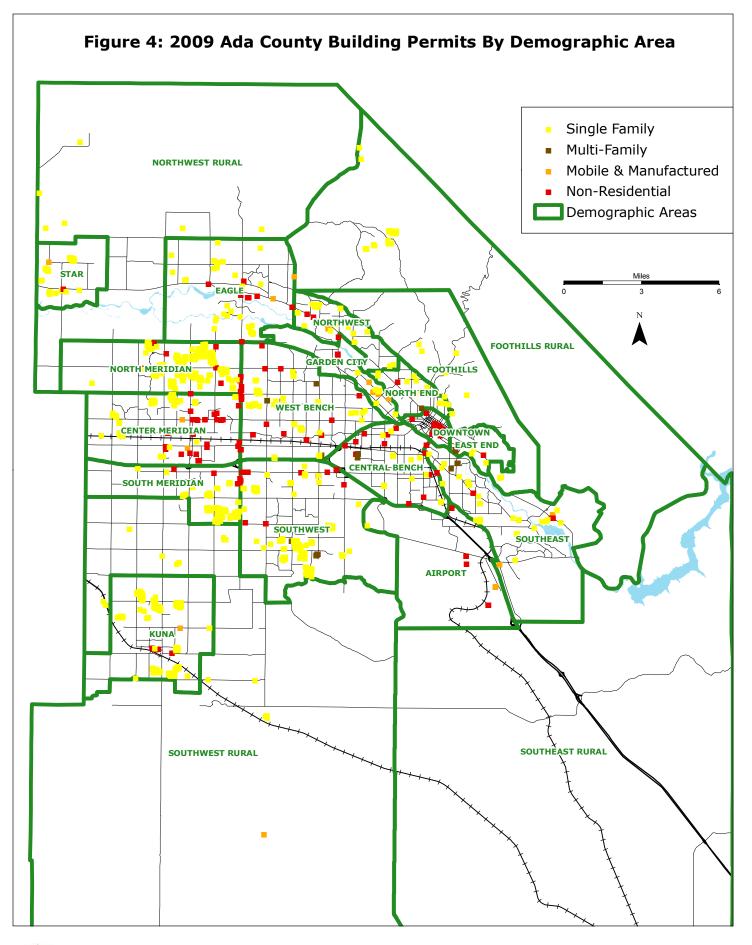
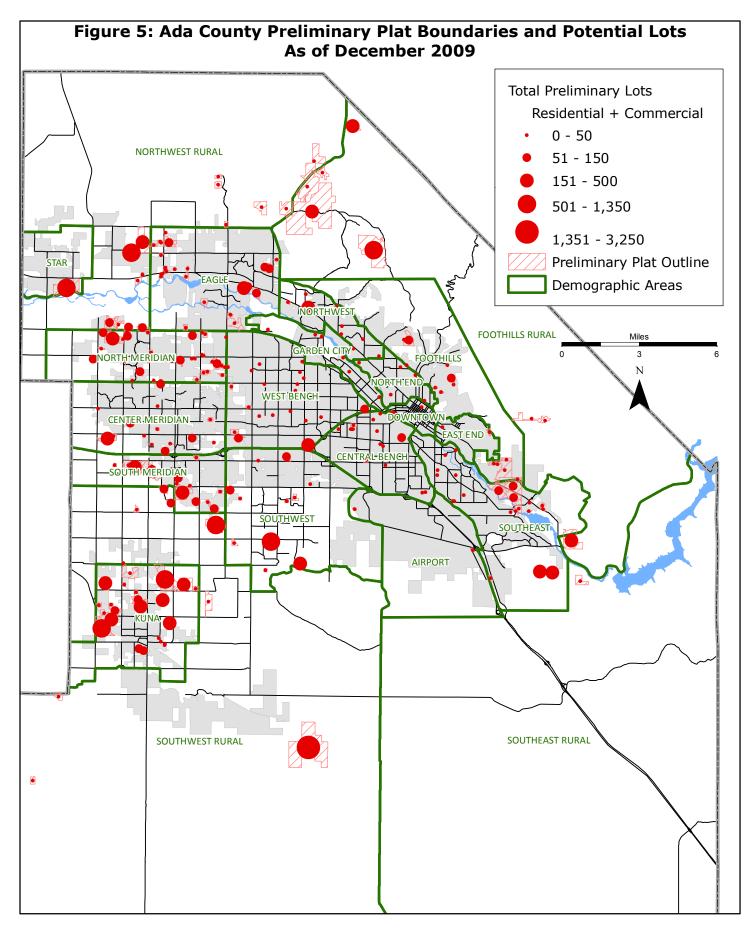


Figure 3: Total New Construction Permits Issued From 2005 to 2009









COMPASS makes no warranty with respect to the accuracy and completeness of the preliminary plat data in this map

Table 6: Ada County Residential Units Permitted Between 2005 and 2009 Versus Short-Term Forecasted Household Growth

	Residential	Residential	Residential	Residential	Residential	Residential	Total Residential	Forecasted	Forecasted
	<b>Units Permitted</b>	Units	Units	Units	Units	Units	Units Permitted	Household	Household
		Permitted	Permitted	Permitted	Permitted	Permitted		Growth	Growth
Demographic Area	2000 to 2004	In 2005	In 2006	In 2007	In 2008	In 2009	2005 to 2009	By 2010	By 2015
AIRPORT	26	4	9	0	(1)	1	13	(5)	(5)
CENTRAL BENCH	741	85	61	263	57	106	572	312	648
DOWNTOWN	433	(3)	81	145	5	83	311	517	1,545
EAST END	175	18	34	34	8	12	106	25	169
FOOTHILLS	368	100	47	33	13	6	199	302	389
NORTH END	225	44	24	12	12	7	99	165	240
NORTHWEST	891	184	99	88	45	24	440	434	973
SOUTHEAST	1,593	260	153	173	28	72	686	348	1,330
SOUTHWEST	3,145	1,359	1,135	452	354	221	3,521	2,068	3,120
WEST BENCH	2,267	550	446	467	189	116	1,768	953	1,898
Boise Area Subtotal	9,864	2,601	2,089	1,667	710	648	7,715	5,121	10,307
CENTER MERIDIAN	3,188	565	382	142	110	123	1,322	1,160	3,663
NORTH MERIDIAN	2,962	2,009	818	433	480	386	4,126	3,733	8,052
SOUTH MERIDIAN	1,312	572	283	178	147	124	1,304	769	1,702
Meridian Area Subtotal	7,462	3,146	1,483	753	737	633	6,752	5,662	13,416
EAGLE	2,073	539	261	78	53	32	963	1,077	2,349
GARDEN CITY	224	33	29	88	23	0	173	164	465
KUNA	1,629	572	297	364	228	235	1,696	1,747	3,398
STAR	421	562	300	121	28	30	1,041	673	1,702
Other City Subtotal	4,347	1,706	887	651	332	297	3,873	3,661	7,914
FOOTHILLS RURAL	397	215	111	62	28	27	443	162	229
NORTHWEST RURAL	274	75	28	17	35	7	162	471	1,642
SOUTHEAST RURAL	21	2	1	2	0	0	5	13	19
SOUTHWEST RURAL	221	82	82	55	10	15	244	356	803
Rural Area Subtotal	913	374	222	136	73	49	854	1,003	2,693
Total	22,586	7,827	4,681	3,207	1,852	1,627	19,194	15,446	34,331

#### Notes

\*Forecasted household growth is based on forecasts developed in 2006 for the 2030 Long Range Transportation Plan, *Communities in Motion*. The base year estimate for the forecasts was 2005 using data up till December 2004.

\*Highlighted cells indicate demographic areas that have experienced growth, based on permitted residential units, that have exceeded forecasted household growth by the forecast horizon year indicated in the column heading.

\*Residential units include single-family, multi-family, and manufactured units permitted during the time period specified. Residential demolotions or units that change to non-residential purposes are subtracted from total new units resulting in a net increase (decrease) in residential units. Data shown reflects permits issued, not permits completed.

	New Residential	Preliminary	Total Likely	Forecasted	Forecasted	Forecasted
	Permits	Plat	Household	Household	Household	Household
		Residential	Growth (Permits	Growth	Growth	Growth
		Lots	+ Preliminary			
			Plat Lots)			
Demographic Area	2005 to 2009	As of 2009	2005 +	By 2020	By 2025	By 2030
AIRPORT	13	15	28	(5)	(5)	(197)
CENTRAL BENCH	572	285	857	648	869	1,662
DOWNTOWN	311	10	321	1,545	3,681	5,276
EAST END	106	2	108	169	297	411
FOOTHILLS	199	312	511	389	419	441
NORTH END	99	29	128	240	330	480
NORTHWEST	440	255	695	973	1,355	1,585
SOUTHEAST	686	720	1,406	1,330	3,443	4,630
SOUTHWEST	3,521	1,215	4,736	3,120	3,554	4,187
WEST BENCH	1,768	459	2,227	1,898	3,066	5,602
Boise Area Subtotal	7,715	3,302	11,017	10,307	17,009	24,077
CENTER MERIDIAN	1,322	801	2,123	3,663	5,963	8,768
NORTH MERIDIAN	4,126	1,428	5,554	8,052	8,966	9,417
SOUTH MERIDIAN	1,304	1,059	2,363	1,702	2,293	3,245
Meridian Area Subtotal	6,752	3,288	10,040	13,416	17,222	21,431
EAGLE	963	891	1,854	2,349	3,179	3,751
GARDEN CITY	173	72	245	465	1,019	1,761
KUNA	1,696	4,094	5,790	3,398	3,932	4,292
STAR	1,041	587	1,628	1,702	2,230	2,616
Other City Subtotal	3,873	5,644	9,517	7,914	10,360	12,421
FOOTHILLS RURAL	443	1,649	2,092	229	241	247
NORTHWEST RURAL	162	1,657	1,819	1,642	2,101	2,301
SOUTHEAST RURAL	5	15	20	19	32	32
SOUTHWEST RURAL	244	4,089	4,333	803	1,229	1,390
Rural Area Subtotal	854	7,410	8,264	2,693	3,603	3,970
Total	19,194	19,644	38,838	34,331	48,193	61,898

### Table 7: Ada County Likely Household Growth Versus Long-Term Forecasted Household Growth

#### Notes

\*Forecasted household growth is based on forecasts developed in 2006 for the 2030 Long Range Transportation Plan, Communities in Motion. The base year estimate for the forecasts was 2005 using data up till December 2004.

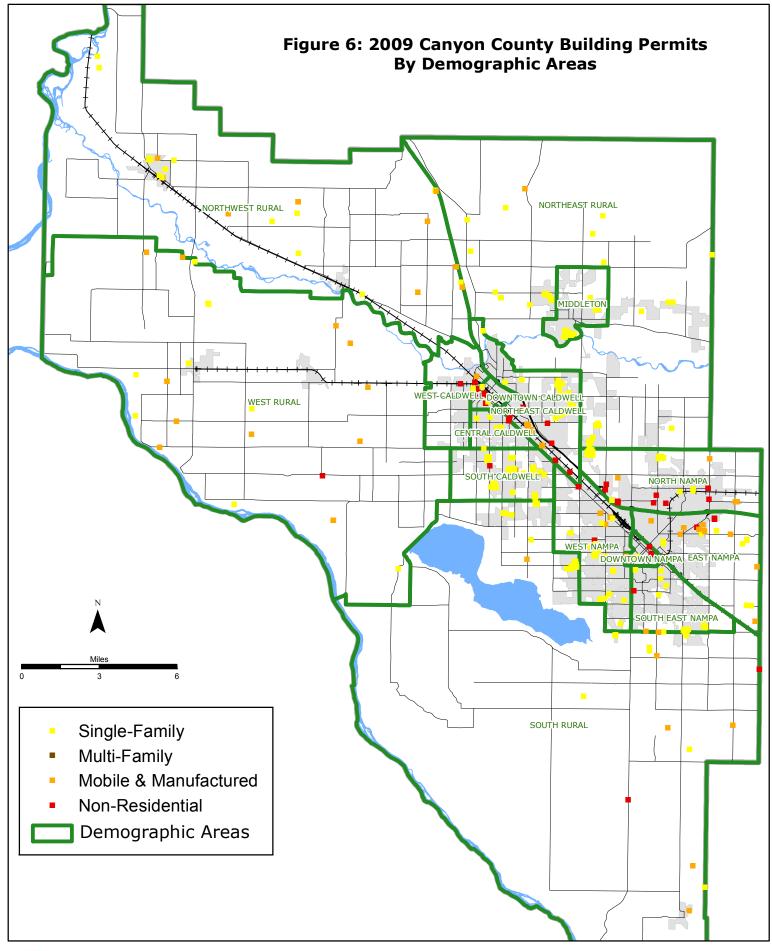
\*Likely household growth is based on permitted residential units & residential lots in preliminary plats.

\*Highlighted cells indicate demographic areas that are likely to exceed forecasted household growth by the forecast horizon year indicated in the column heading.

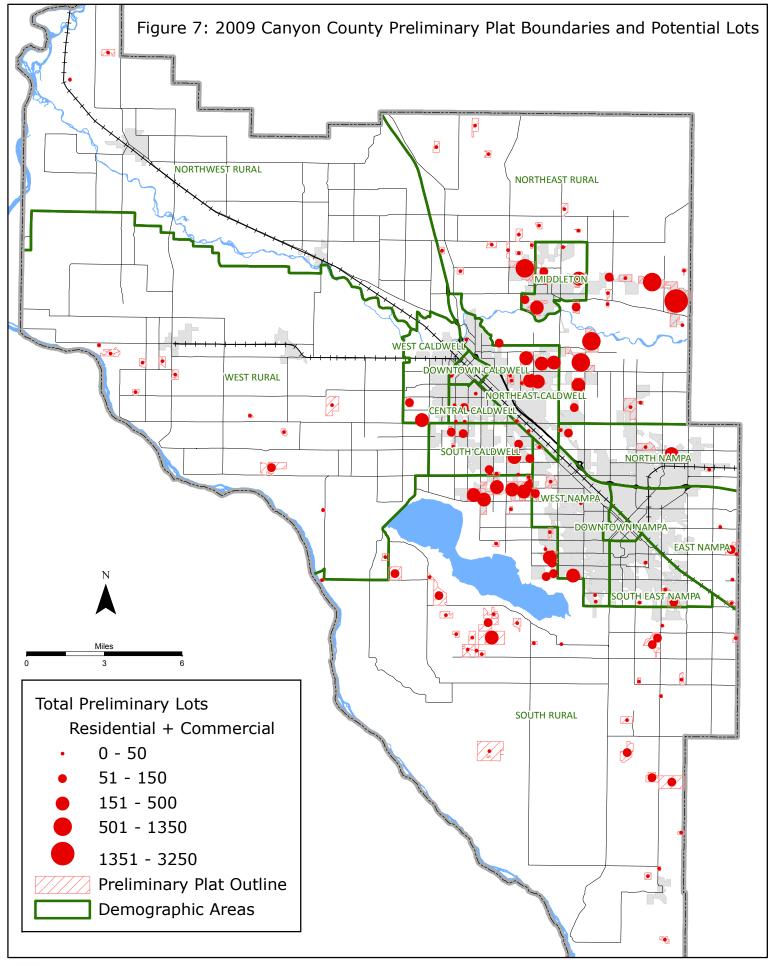
\*Residential units include single-family, multi-family, and manufactured units permitted during the time period specified. Residential demolotions or units that change to non-residential purposes are subtracted from total new units resulting in a net increase (decrease) in residential units. Data shown reflects permits issued, not permits completed.

\*Preliminary plats are subdivisions that have received a preliminary approval but have not been granted final approval and recorded.

\*COMPASS makes no warrantv with respect to the accuracv and completeness of the preliminarv plat data in this table.







COMPASS makes no warranty with respect to the accuracy and completeness of the preliminary plat data in this map

Table 8: Canyon County Residential Units Permitted Between 2005 and 2009 Versus Short-Term Forecasted Household Growth

	Residential Units Permitted	Residential Units	Residential Units	Residential Units	Residential Units	Residential Units	Total Residential	Forecasted Household	Forecasted Household
		Permitted	Permitted	Permitted	Permitted	Permitted	Units Permitted	Growth	Growth
Demographic Area	2000 to 2004	In 2005	In 2006	In 2007	In 2008	In 2009	2005 to 2009	By 2010	By 2015
DOWNTOWN NAMPA	12	4	(2)	0	1	1	4	165	355
EAST NAMPA	1,062	106	159	61	26	16	368	501	1,342
NORTH NAMPA	1,166	301	120	35	52	77	585	1,833	3,597
SOUTH EAST NAMPA	1,985	291	243	53	55	19	661	427	561
WEST NAMPA	3,227	829	743	336	81	28	2,017	1,703	2,456
Nampa Area Subtotal	7,452	1,531	1,263	485	215	141	3,635	4,629	8,310
CENTRAL CALDWELL	413	89	27	75	0	3	194	233	545
DOWNTOWN CALDWELL	(4)	2	1	2	(2)	(2)	1	7	90
NORTHEAST CALDWELL	725	270	365	449	140	65	1,289	1,933	2,673
SOUTH CALDWELL	1,432	338	518	378	211	89	1,534	1,099	2,071
WEST CALDWELL	340	80	113	39	5	3	240	245	740
Caldwell Area Subtotal	2,906	779	1,024	943	354	158	3,258	3,517	6,119
MIDDLETON	344	97	126	87	78	19	407	682	1,220
Other City Subtotal	344	97	126	87	78	19	407	682	1,220
NORTHEAST RURAL	785	384	361	160	71	38	1,014	489	839
NORTHWEST RURAL	276	65	77	86	22	27	277	446	1,312
SOUTH RURAL	641	208	279	219	92	56	854	1,042	1,370
WEST RURAL	355	148	153	108	28	21	458	501	972
Rural Area Subtotal	2,057	805	870	573	213	142	2,603	2,478	4,493
Total	12,759	3,212	3,283	2,088	860	460	9,903	11,306	20,142

### Notes

\*Forecasted household growth is based on forecasts developed in 2006 for the 2030 Long Range Transportation Plan, Communities in Motion. The base year estimate for the forecasts was 2005 using data up till December 2004.

\*Highlighted cells indicate demographic areas that have experienced growth, based on permitted residential units, that have exceeded forecasted household growth by the forecast horizon year indicated in the column heading

\*Residential units include single-family, multi-family, and manufactured units permitted during the time period specified. Residential demolotions or units that change to non-residential purposes are subtracted from total new units resulting in a net increase (decrease) in residential units. Data shown reflects permits issued, not permits completed.

	New Residential Permits	Preliminary Plat	Total Likely Household Growth		Forecasted Household	Forecasted Household
		Residential	(Permits +	Growth	Growth	Growth
		Lots	Preliminary Plat			
			Lots)			
Demographic Area	2005 to 2009	As of 2009	2005 +	By 2020	By 2025	By 2030
DOWNTOWN NAMPA	4	AS 01 2007 0		614		
EAST NAMPA	368	195		2,214		
NORTH NAMPA	585	577	1,162	4,316		
SOUTH EAST NAMPA	661	208		607	649	
WEST NAMPA	2,017	765		3,283	÷	
Nampa Area Subtotal	3,635	1,745				
CENTRAL CALDWELL	194	148		829		
DOWNTOWN CALDWELL	1	36		345		
NORTHEAST CALDWELL	1,289	1,390	2,679	3,060	3,390	3,784
SOUTH CALDWELL	1,534	843	2,377	2,610	2,860	3,249
WEST CALDWELL	240	342	582	952	1,188	1,265
Caldwell Area Subtotal	3,258	2,759	6,017	7,796	9,193	10,472
MIDDLETON	407	61	468	1,416	1,501	1,551
Other City Subtotal	407	61	468			
NORTHEAST RURAL	1,014	4,416				
NORTHWEST RURAL	277	12	289	1,923	2,598	3,159
SOUTH RURAL	854	3,941	4,795			
WEST RURAL	458	326		1,378		
Rural Area Subtotal	2,603					
Total	9,903	13,260	23,163	26,224	30,772	35,136

Table 9: Canyon County Likely Household Growth Versus Long-Term Forecasted Household Growth

### Notes

\*Forecasted household growth is based on forecasts developed in 2006 for the 2030 Long Range Transportation Plan, Communities in Motion. The base year estimate for the forecasts was 2005 using data up till December 2004.

\*Likely household growth is based on permitted residential units & residential lots in preliminary plats.

\*Highlighted cells indicate demographic areas that are likely to exceed forecasted household growth by the forecast horizon year indicated in the column heading.

\*Residential units include single-family, multi-family, and manufactured units permitted during the time period specified. Residential demolotions or units that change to non-residential purposes are subtracted from total new units resulting in a net increase (decrease) in residential units. Data shown reflects permits issued, not permits completed.

\*Preliminary plats are subdivisions that have received a preliminary approval but have not been granted final approval and recorded.

\*COMPASS makes no warranty with respect to the accuracy and completeness of the preliminary plat data in this table.