LAND USE ASSUMPTIONS REPORT (2020-2030)

PREPARED FOR

SANTA FE COUNTY, NEW MEXICO

September 2020

ELEMENTS

1. INTRODUCTION

1.1. Purpose

Santa Fe County ("the County") is working towards a more sustainable community to meet the needs of future population growth and new developments. This land use assumptions report ("the LUA report") provides an overview of population, employment, housing, and land use changes under different geographies for the County to provide and maintain infrastructure and public services. The information presented in the LUA report is the first step in a multi-step process required for the County to adopt a capital improvement plan (CIP) and consider impact fees under the New Mexico Development Fees Act and the Santa Fe County Sustainable Land Development Code (SLDC).

1.2. Components

According to the definition of "land use assumptions" in New Mexico State Statute, a land use assumptions report shall "include a description of the service area and projections of changes in land uses, densities, intensities, and population in the service area over at least a five-year period." N.M. Stat. § 5-8-2. (2006).

The Santa Fe County Sustainable Land Development Code (SLDC) requires that land use assumptions "provide a projection of changes in land use densities, intensities, and population within planning service areas over at least a five-year period. Prior to imposing a development fee, the Board will hold a public hearing to consider the LUA report that will be used to develop a capital improvements plan related to the proposed development fee." SLDC, Ordinance No. 2016-12. § 12.5.8.

1.3. Report Development and Approval Process

This LUA report was produced by qualified planning professionals in the Santa Fe County Growth Management Department and the Cornell University Department of City and Regional Planning. It contains data gathered for the County government from U.S. Census and the Bureau of Business and Economic Research, and

information from relevant studies prepared for the County.

The Capital Improvements Advisory Committee ("the Advisory Committee") will provide oversight and assistance in the preparation of the final LUA report in accordance with the New Mexico Development Fees Act. Following the advisory committee's review and written comments filed six days before the public hearing, the findings of the LUA report will be presented to the governing body at a public hearing for their approval. The County's determination on the LUA report shall be filed within 30 days after public hearings.

Upon adoption of the LUA report, qualified professionals with Economic Planning Systems, Inc. will prepare a levels of service analysis that compares existing levels of service with the infrastructure needed to maintain service levels and accommodate future development. This levels of service analysis will support a subsequent CIP and impact fees study for the County. N.M. Stat. §§ 5-8-19. – 27. (2006).

1.4.   Update Process

Under the Development Fees Act, after the County approves the LUA report and imposes impact fees, the LUA report must be updated every five years starting from the date of the CIP's adoption, or whenever necessary. At the time an update is required, the County may determine to adopt the LUA report without amendments.

If the County determines that no changes to the LUA report are necessary, it shall publish a notice of its determination. The Advisory Committee shall file its written comments on the LUA report six days before the earliest notice.

If an update is required and prepared, the County shall schedule and publish notice of a public hearing within sixty days upon receiving the update. The Advisory Committee shall file its written comments on the proposed amendments to the LUA report six days before the public hearing. The County's determination on the amendments to the LUA report shall be filed within 30 days after the public hearing.

N.M. Stat. §§ 5-8-30. – 36. (2006).

1.5. Public Participation

The LUA report shall be available to the public on or before the date of the first publication of notice of public hearings and the records of the public hearings shall be available for public inspection for at least 10 years. N.M. Stat. §§ 5-8-20., 25., 39. (2006).

2. METHODOLOGY

2.1. Planning Principles

The methodology used to develop this LUA report is based on residential and non-residential growth projections that follow reasonable and generally accepted planning principles. It is performed to determine the full development potential or service demand of an area. This LUA report takes into consideration several factors that influence the development patterns in the County, including:

(1) Character, type, density, location, and quantity of existing development;

(2) Availability of land for future expansion;

(3) Anticipated development projects as defined by county staff and the Infrastructure Buildout Analysis;

(4) Population growth trends;

(5) Employment growth trends;

(6) Housing unit growth trends; and

(7) Land use change.

It is also important to note that we are currently uncertain if and how the Covid-19 pandemic and its long-term impacts will effect population, housing and employment growth in Santa Fe County over the next decade.

2.2. Tasks

This LUA report aims to calculate future development potential for residential and non-residential development in the County over the next ten years. A series of general work tasks were undertaken in the development of this report and are described below:

(1) Define the scope of the study and collect data.

County staff held a meeting to discuss notes, options, and recommendations for the Santa Fe County Impact Fees service area (see 2.5 Service Area). Data on

population, employment, housing unit, and land use were collected from various sources and the study geographies were customized to conform with existing reports prepared for the County (see 5 Data).

(2) Determine the base year, growth rates, and projection period.

The baseline year was also reset to 2018 using U.S. Census 2018 estimates for the County and its municipalities. Each geography was evaluated from the perspective of its historical and current development estimates and anticipated future growth trends.

The overall amount of projected growth in the County is based on the University of New Mexico's (UNM) 2017 projections for Santa Fe County, which, for the 2020-2030 timeframe are about 85% of the amount of growth that was projected in the custom projections that the University of New Mexico prepared for Santa Fe County in 2014. The population, housing, employment projections in this report have been scaled back accordingly, using the 2014 UNM geographic sub-area projections as a basis.

The ratio of single-family to multi-family housing types in municipalities except SDA-1 were inferred from the ratio for the entire county based on U.S. Census data. The number was calculated by subtracting the numbers for the municipalities proportionally from the County-wide totals. For the ratio in SDA-1, assumptions of employees per acre are used.

In this LUA report, tables and charts include projections for a ten-year period, from 2020 to 2030, in accordance with the New Mexico Development Fees Act.

(3) Calculate and adjust the projections.

The growth rates were applied to each geography to project the base year data of each factor over the ten-year projection period (2020-2030). After completing the projections, the County staff will consider other data sources and land conditions

to adjust the results.

(4) Calculate other indicators.

Changes, percentage change, and other indicators were developed with projections and existing demographic and land acre data to provide development patterns for geography-based analyses.

3. COUNTY PROFILE

3.1. Location and Area

Santa Fe County covers 1,911 square miles in North-Central New Mexico ("the State"), of which 1,909 square miles is land and 1.5 square miles is water, making it the fifth smallest county in the State by land area. Santa Fe County borders seven counties: Rio Arriba County in the north, Mora County in the northeast, San Miguel County in the east, Torrance County in the south, Bernalillo County in the southwest, Sandoval County in the west, and Los Alamos County in the northwest.

3.2. Municipalities

There are three incorporated municipalities in the County: the City of Santa Fe, the City of Espanola, and the Town of Edgewood. Apart from these municipalities, there are six federally recognized sovereign tribes (Pueblos) in Santa Fe County. This LUA report is concerned with the unincorporated and non-Pueblo areas of the County.

3.3. Comprehensive Plan and Code

The Sustainable Growth Management Plan (SGMP) states that: "Residents and public officials of Santa Fe County have come to understand the gravity of the limits of our natural resources, the fragility of the web of our living system upon which our survival depends, and the need for a new and different relationship with our local and global environments and with each other." (SGMP, 1.1 Introduction, Sustainable Growth Management Plan Preamble) The County's policy and regulatory tools are designed to meet this vision of a sustainable future.

The 2010 SGMP was developed as a comprehensive revisioning and update of the Santa Fe County Growth Management Plan ("the General Plan"). It provides a policy framework for long-range planning and outlines the required levels of infrastructure services to address future growth in the County.

Guided by the SGMP, the Sustainable Land Development Code (SLDC) was created

to provide a legal framework for implementing the land development and growth management policies of the SGMP. It identifies the standards and procedures that enforce this growth management paradigm.

3.4. Geographies

The geographies used in the LUA report include the entire area of the County, the City of Santa Fe, the City of Espanola, the Town of Edgewood, tribal lands, the unincorporated county, four Growth Management Areas (GMAs), and three Sustainable Development Areas (SDAs). Among all the geographies, the County, the unincorporated county, and SDA-1 are the most valuable for analysis since most new developments and capital improvement projects are likely to fit within these geographies.

Land Use Jurisdictions

Land use jurisdictions include Santa Fe County, the City of Santa Fe, the City of Espanola, the Town of Edgewood, tribal lands, and the unincorporated areas of the County (see Map 3.4.1.).
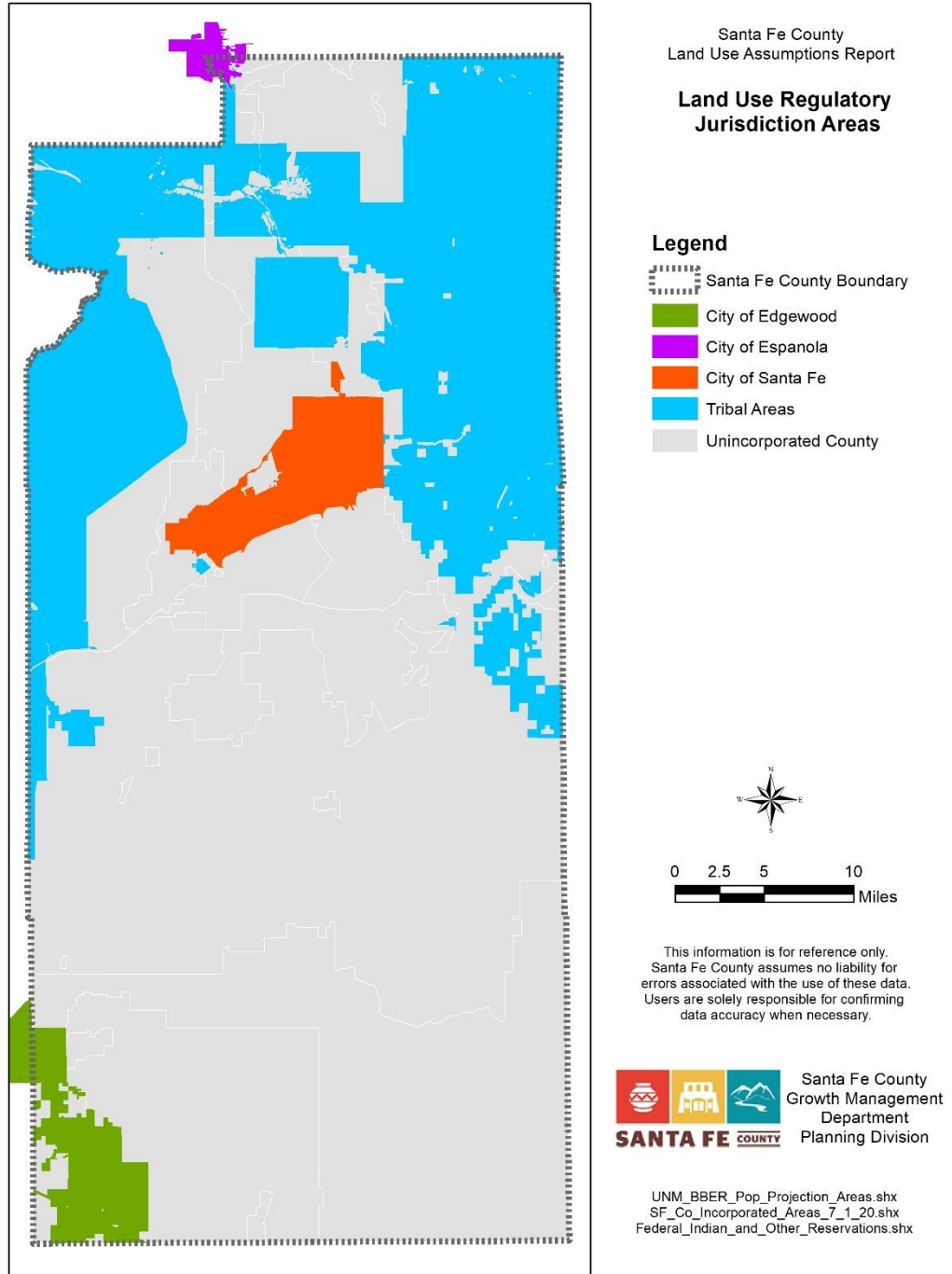
Growth Management Areas (GMAs)

The four GMAs are defined as the El Norte GMA, El Centro GMA, Galisteo GMA, and Estancia GMA (see Map 3.4.2.). The County delineated the four GMAs as part of the planning process based on the following criteria: (1) Geographic boundaries with topographic features and hydrologic basins; (2) Continuity with existing Community Planning areas and boundaries to avoid fragmentation; (3) Delineation of political boundaries; (4) Major transportation networks and corridors connecting the GMAs; (5) Existing large tract and parcel boundaries; (6) sensitivity to the landscape and historical context; and (7) Consideration of open space buffers.
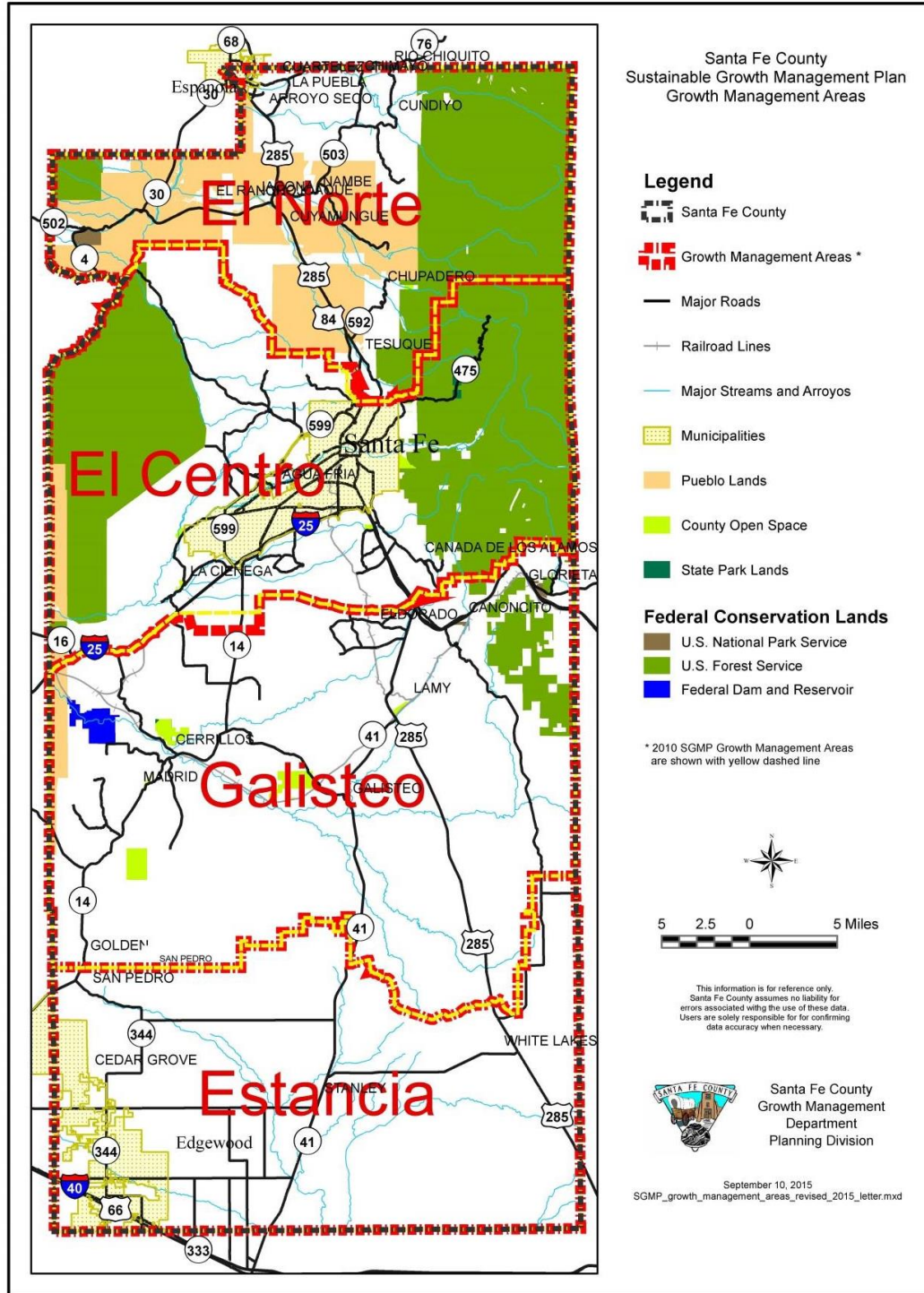
Sustainable Development Areas (SDAs)

The three SDAs are defined as SDA-1, SDA-2 and SDA-3 (see Map 3.4.3.). The County is divided into these three sub-areas based on functional distinctions and

growth priorities within a growth management system that promotes compact development. SDA-1 is the County's primary growth area where infrastructure is planned, budgeted, or reasonably available, and new development is likely and reasonable to occur within the next twenty years. In SDA-2, some infrastructure may be reasonably available with future funding through the proposed CIP, and new development is likely and reasonable to occur over the next 20 years or as infill within existing communities. In SDA-3 areas, infrastructure is not available or budgeted unless at the expense of new development; therefore, new development is unlikely to occur.

Map 3.4.1. Land Use Regulatory Jurisdiction Areas, 2020

Map 3.4.2. Santa Fe County Growth Management Areas (GMAs), 2010 SGMP
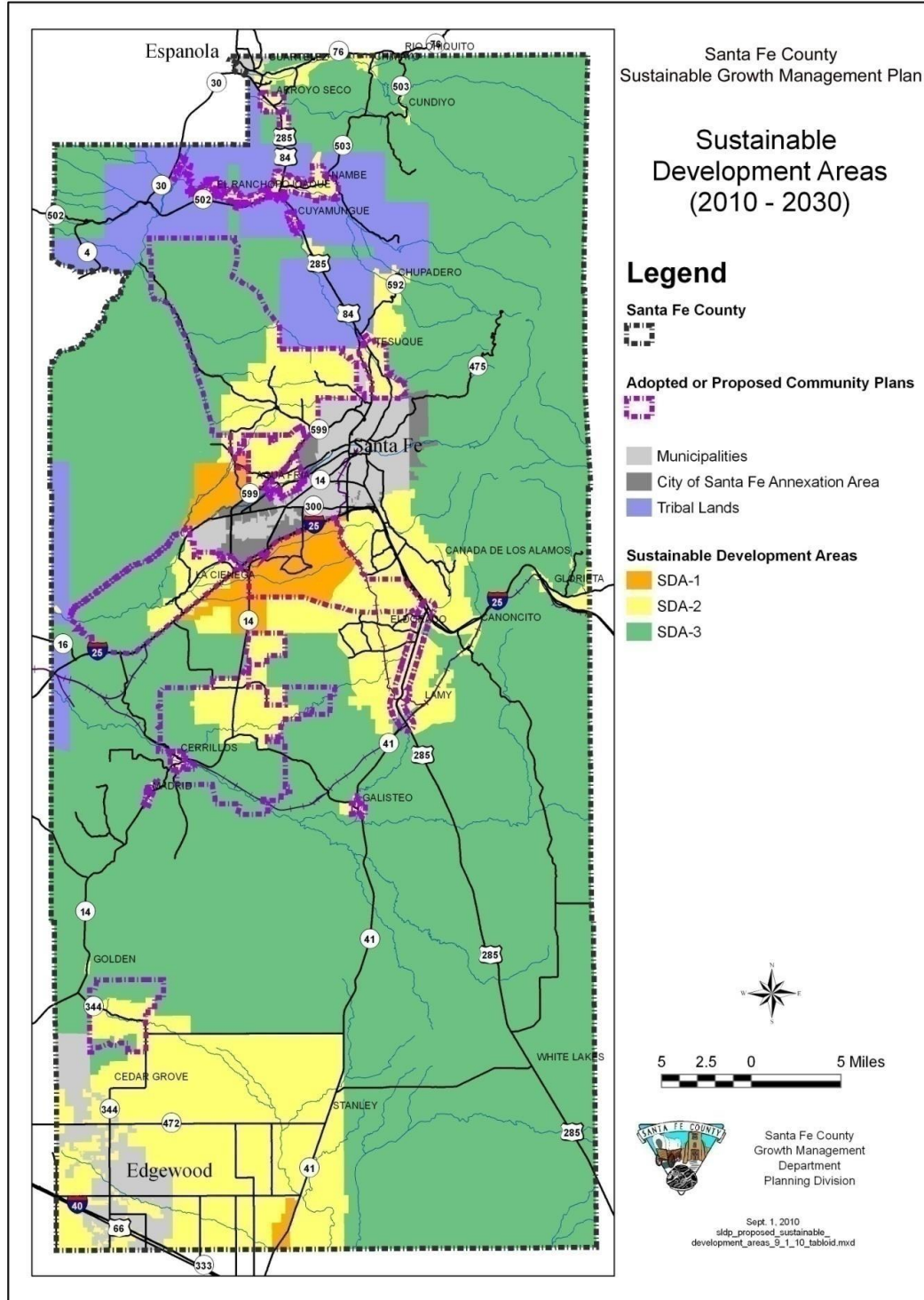
Map 3.4.3. Santa Fe County Sustainable Development Areas (SDAs), 2010 SGMP

3.5. Service Area

The Development Fees Act and SLDC require that service areas be established within

the corporate boundaries or extraterritorial jurisdiction of the County and be described in the LUA report for the purpose of ensuring CIP and impact fee development. N.M. Stat. § 5-8-2 (2006); SLDC, Ordinance No. 2016-12. § 12.5.15.

The County is obligated to provide infrastructure, public facilities, and general services, for (1) roadways; (2) water and wastewater utility; (3) law enforcement; (4) fire and rescue; (5) open spaces; (6) parks, and recreation areas; (7) trails; and (8) trailheads. Since the water and wastewater utility is considering Utility Expansion Charges for the entirety of their water and wastewater service areas, it is not subject to the impact fee study and therefore, not included in this LUA report. (see Table 2.5. Service Area(s) By Category)

Due to differences in population, employment, and housing unit density, as well as the capital ability to support new development, the County defines service areas for the infrastructure, public facilities, and general services. The service area for roadways covers all SDAs and is divided into two parts: (1) SDA-1 and SDA-2; and (2) SDA-3. The entire county constitutes the service area for the remaining services except water and wastewater utility. (see Table 2.5. Service Area(s) By Category)

Service Category	Service Area(s)
Roads	(1) SDA-1 and SDA-2; (2) SDA-3
Law Enforcement	Entire County
Fire and Rescue	Entire County
Open Spaces	Entire County
Parks and Recreation Areas	Entire County
Trails	Entire County
Trailheads	Entire County

Table 2.5. Service Area(s) By Category, 2020

County staff is advised to amend the service areas established in SLDC section 12.5.15 in accordance with the service areas outlined in this LUA report.

4. PROJECTIONS

4.1. Population

a. Population by County, Municipalities, Tribal Areas, and Unincorporated County

Year	Santa Fe County	City of Santa Fe	Town of Edgewood	City of Espanola	Tribal Areas	Unincorporated County
2020	**152,106**	85,667	6,227	3,414	3,549	**53,227**
2021	153,141	85,974	6,278	3,458	3,560	53,840
2022	154,183	86,283	6,329	3,502	3,572	54,460
2023	155,233	86,593	6,381	3,548	3,583	55,088
2024	156,290	86,903	6,433	3,593	3,594	55,723
2025	157,353	87,215	6,486	3,640	3,605	56,365
2026	158,424	87,529	6,539	3,687	3,617	57,014
2027	159,503	87,843	6,593	3,734	3,628	57,671
2028	160,588	88,158	6,647	3,783	3,639	58,335
2029	161,681	88,475	6,701	3,831	3,651	59,008
2030	**162,782**	88,792	6,756	3,881	3,662	**59,688**

Table 4.1.1. Population by County, Municipalities, Tribal Areas, and Unincorporated County, 2020-2030

	Santa Fe County	City of Santa Fe	Town of Edgewood	City of Espanola	Tribal Areas	Unincorporated County
Change, 2020-2030	**10,676**	3,125	529	467	113	**6,461**
% Change, 2020-2030	7.0%	3.6%	8.5%	13.7%	3.2%	12.1%
Growth Rates, 2020 to 2030	1.0068	1.0036	1.0082	1.0129	1.0031	1.0115

Table 4.1.2. Changes and Growth Rates of Population by County, Municipalities, Tribal areas, and Unincorporated County, 2020-2030
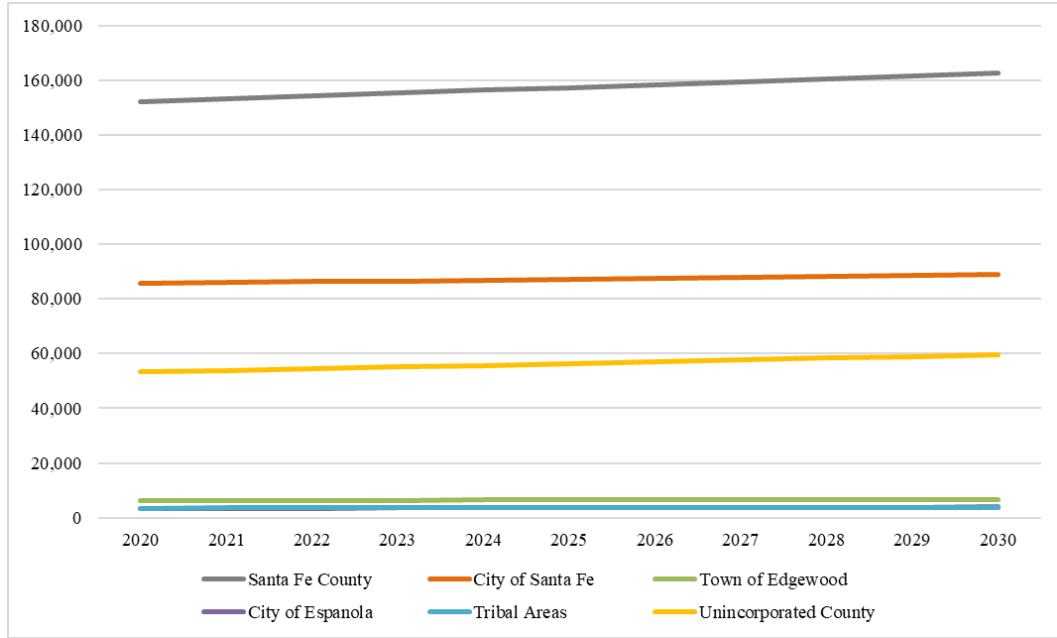
Chart 4.1.1. Population Growth Trends by County, Municipalities, Tribal Areas, and Unincorporated County, 2020-2030
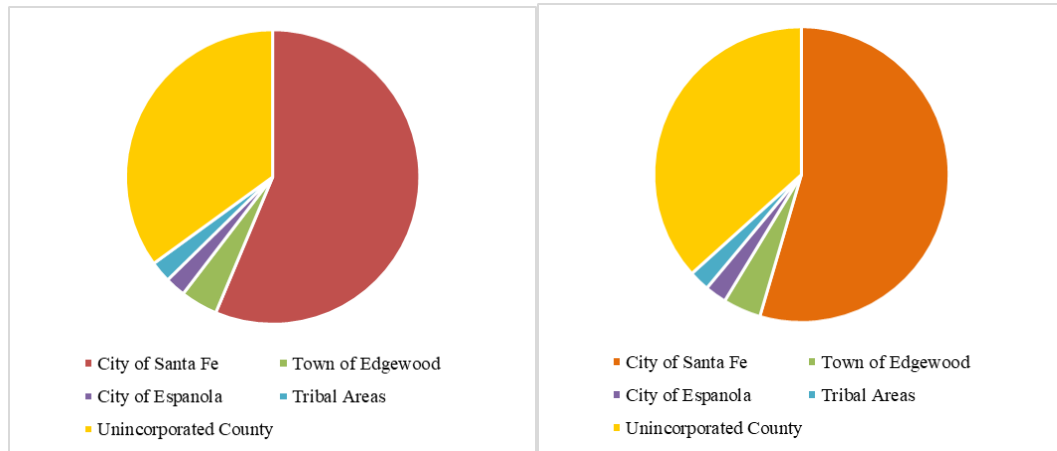
Chart 4.1.2. Population Distribution by County, Municipalities, Tribal Areas, and Unincorporated County, 2020 (Left) & 2030 (Right)

**Colors in this pie chart correspond the line colors in Chart 4.1.1.

Table 4.1.1., Table 4.1.2., Chart 4.1.1., and Chart 4.1.2. report population estimates and forecasts from 2020 to 2030, for the entire County, for the municipalities of Santa Fe, Espanola, and Edgewood, for Tribal Areas, and for the unincorporated County.

The population of the entire County is projected to grow steadily at an annual rate of

1.0068 (0.68 percent). This model estimates that the County's population will grow by 10,676 individuals between 2020 and 2030, an increase of 7 percent of the County's 2020 population.

The population growth within the County is mainly associated with the anticipated population boosts in two areas with large population bases – the City of Santa Fe and the unincorporated County. The City of Santa Fe has a population of 85,667 in 2020, making it the most populated jurisdiction in the County. Though the City of Santa Fe's annual population growth rate is moderate (only 1.0036 or 0.36 percent), when multiplied by its population base, it still results in a population increase of 3,125 between 2020 and 2030. The unincorporated County has a relatively small population compared to the City of Santa Fe (53,227 in 2020), but it has a much higher annual population growth rate of 1.0115 (1.15 percent). Therefore, the population increase in the unincorporated County amounts to 6,461, making up more than 60 percent of the County's population growth during the projection period.

The annual population growth rate for the Town of Edgewood is projected to be 1.0082 (0.82 percent), slightly above the County's overall growth rate. Edgewood's population is projected to growth by 529 individuals by the end of 2030.

In addition to the above three areas, the City of Espanola is expected to contribute to 4.4 percent of the County's overall population growth during the period. Unlike other dense areas, only a portion of the City of Espanola is within Santa Fe County and it represents a small fraction of the County's population in 2020. Still, it has the highest population growth rate 1.0129 (1.29 percent) of any municipality in the County, resulting in an estimated population increase of 467 by 2030.

Between 2020 and 2030, it is anticipated that the tribal areas will grow at the lowest annual rate (1.0031 or 0.31 percent), leading to a population increases of 113.

b. Population by Growth Management Area (GMA)

Year	El Centro (GMA)	El Norte (GMA)	Estancia (GMA)	Galisteo (GMA)
2020	32,790	7,778	2,871	9,719
2021	33,447	7,725	2,873	9,701
2022	34,117	7,672	2,876	9,684
2023	34,801	7,620	2,878	9,667
2024	35,498	7,568	2,881	9,649
2025	36,209	7,516	2,883	9,632
2026	36,934	7,465	2,886	9,615
2027	37,674	7,413	2,888	9,597
2028	38,429	7,363	2,890	9,580
2029	39,199	7,312	2,893	9,563
2030	39,984	7,262	2,895	9,546

Table 4.1.3. Population by Growth Management Areas (GMAs), 2020-2030

	El Centro (GMA)	El Norte (GMA)	Estancia (GMA)	Galisteo (GMA)
Change, 2020-2030	7,194	-516	24	-173
% Change, 2020-2030	21.9%	-6.6%	0.9%	-1.8%
Growth Rates, 2020 to 2030	1.0200	0.9932	1.0008	0.9982

Table 4.1.4. Changes and Growth Rates of Population by Growth Management Areas (GMAs), 2020-2030
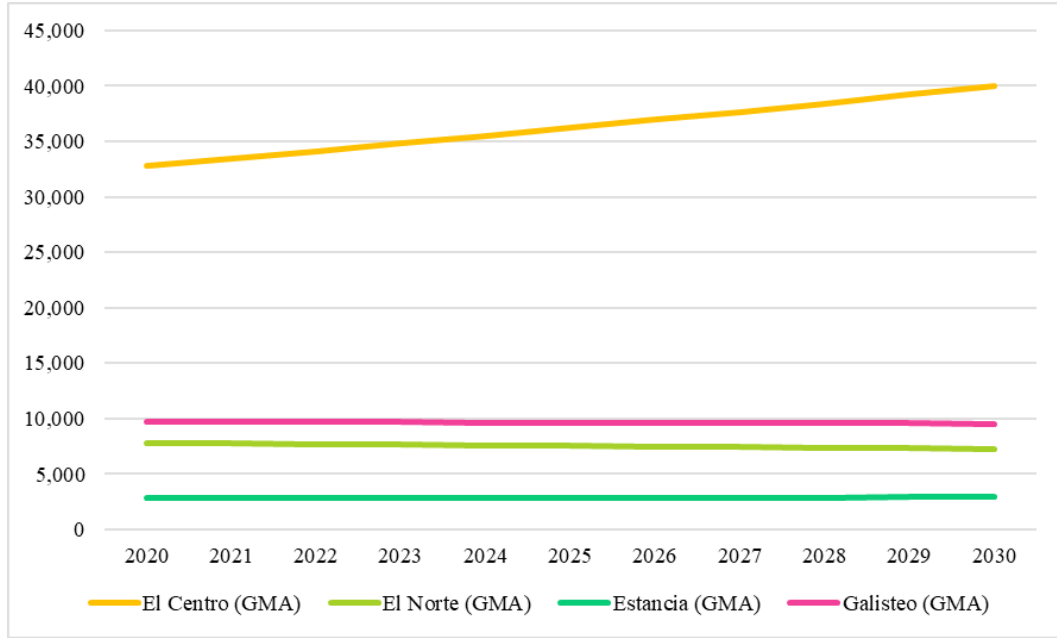
Chart 4.1.3. Population Growth Trends by Growth Management Areas (GMAs), 2020-2030
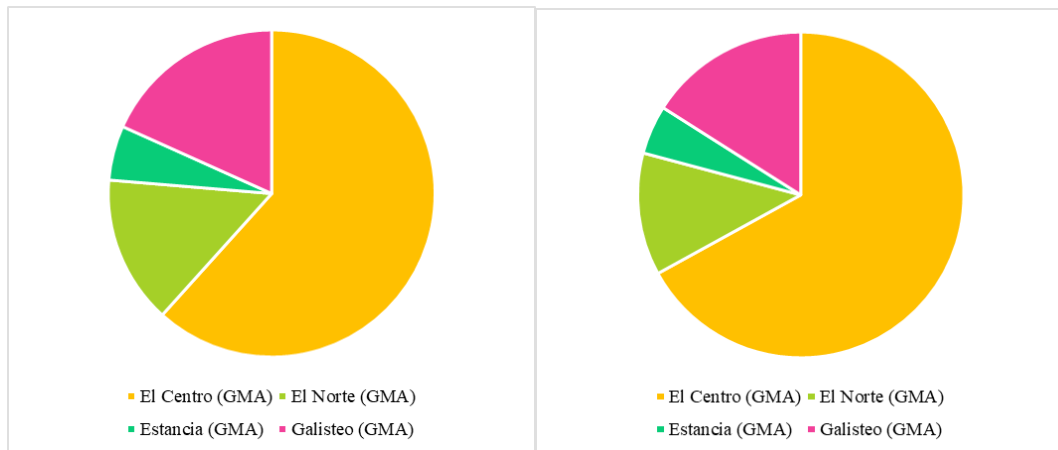
Chart 4.1.4. Population Distribution by Growth Management Areas (GMAs), 2020 (Left) & 2030 (Right)

**Colors in this pie chart correspond the line colors in Chart 4.1.3.

Table 4.1.3., Table 4.1.4., Chart 4.1.3., and Chart 4.1.4. show population estimates and forecasts from 2020 to 2030 for the County's four GMAs.

Population growth within the unincorporated areas of the County will mainly be concentrated in the El Centro GMA from 2020 to 2030. This is reflected by two growth measurements. First, it is anticipated to continue a rapid population growth at an annual rate of 1.0200 (2 percent) during the projection period and will increase its

population by 21.9 percent. Second, the 2020 population of El Centro is estimated to be 32,790 in 2020, about 1.5 times the total population of the other GMAs. Based on this substantial growth rate and large initial population, this model estimates that El Centro will grow by 7,194 individuals between 2020 and 2030, 67.4 percent of the County's total population growth.

In comparison, the El Norte, Estancia, and Galisteo GMAs are expected to experience mild population changes and have little influence on the County's population growth during the period. The El Norte and Galisteo GMAs are expected to see population decline between 2020 and 2030. It is anticipated that the population in the El Norte will diminish at an annual rate of 0.9932 (0.68 percent), resulting in a population loss of 516 by 2030. Though larger than El Norte's population, Galisteo's population is expected to decrease at a slower annual rate (0.9982 or 0.18 percent) than El Norte's rate, resulting in a decrease of 173 individuals by 2030. Estancia is the least populated GMA, with a population of less than 5 thousand. It is forecasted to grow by an additional 24 residents at an annual rate of 1.0008 (0.08 percent).

c.   Population by Sustainable Development Areas (SDAs)

Year	SDA-1	SDA-2	SDA-3
2020	8,671	38,542	5,959
2021	8,961	38,839	5,965
2022	9,261	39,138	5,971
2023	9,571	39,440	5,977
2024	9,891	39,743	5,984
2025	10,222	40,050	5,990
2026	10,564	40,358	5,996
2027	10,917	40,669	6,002
2028	11,282	40,983	6,008
2029	11,660	41,298	6,015
2,030	12,050	41,617	6,021

Table 4.1.5. Population by Sustainable Development Areas (SDAs), 2020-2030

	SDA-1	SDA-2	SDA-3
Change, 2020-2030	3,379	3,075	62
% Change, 2020-2030	39.0%	8.0%	1.0%
Growth Rates, 2020 to 2030	1.0335	1.0077	1.0010

Table 4.1.6. Changes and Growth Rates of Population by Sustainable Development Areas (SDAs), 2020-2030
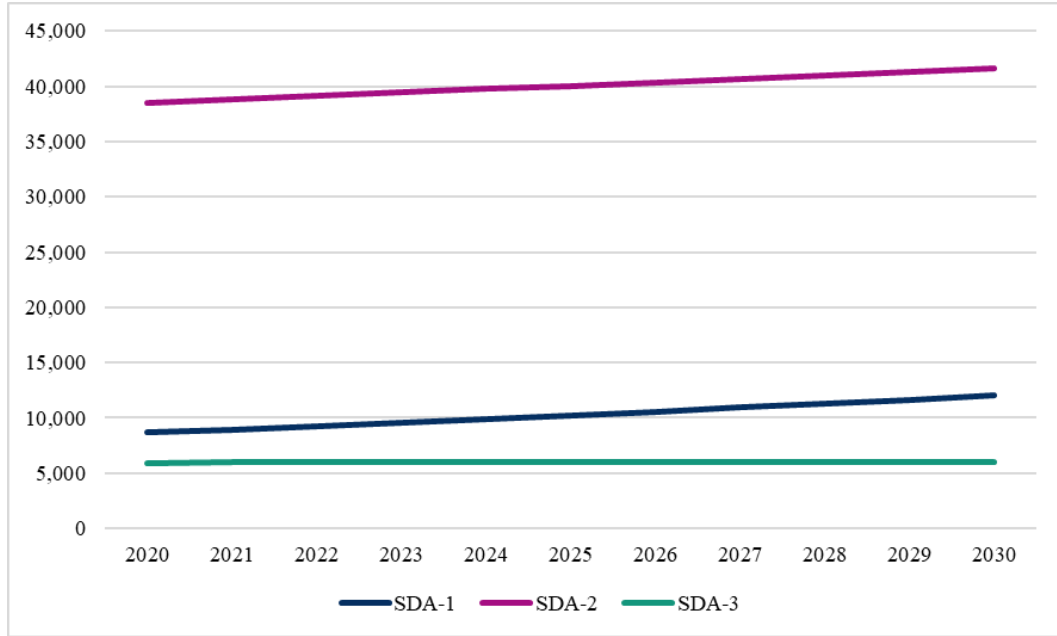
Chart 4.1.5. Population Growth Trends by Sustainable Development Areas (SDAs), 2020-2030
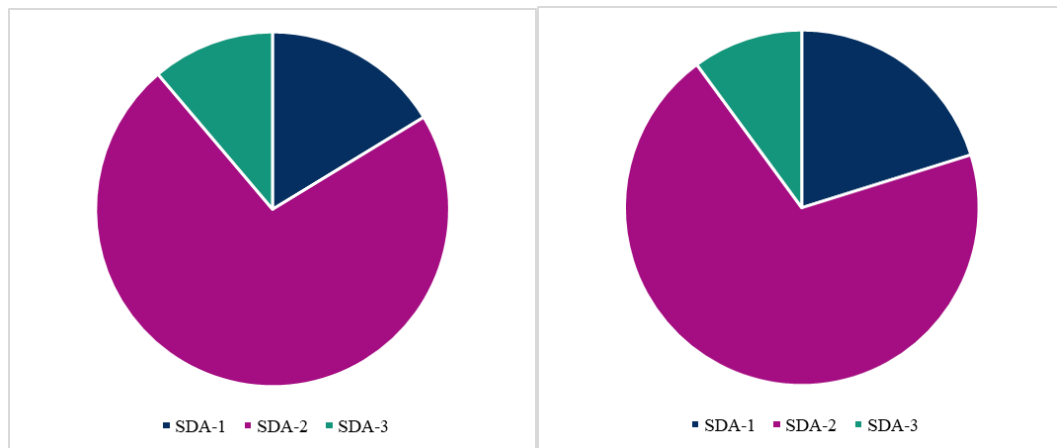
Chart 4.1.6. Population Distribution by Sustainable Development Areas (SDAs), 2020 (Left) & 2030 (Right)

**Colors in this pie chart correspond the line colors in Chart 4.1.5.

Table 4.1.5., Table 4.1.6., Chart 4.1.5., and Chart 4.1.6. show population estimates and forecasts from 2020 to 2030 for the three SDAs.

SDA-2 has the largest population among all SDAs (38,542 in 2020) and is expected to grow at a rate of 1.0077 (0.77 percent), adding 3,075 individuals to the County by 2030. Compared to SDA-2, SDA-1 and SDA-3 share a smaller proportion of the County's population in 2020, 5.7 percent (8,671) and 3.9 percent (5,959) respectively.

However, the population of SDA-1 is anticipated to grow faster than SDA-2 at the rate of 1.0335 (3.35 percent). The population of SDA-2 is expected to double by 2030. SDA-3 is projected to grow at a slow annual rate of 1.0010 (0.10 percent) and add an additional 62 people by 2030.

4.2. Housing Units

a. Housing Units By County, Municipalities, Tribal Areas, and Unincorporated County

Year	Santa Fe County	City of Santa Fe	Town of Edgewood	City of Espanola	Tribal Areas	Unincorporated County
2020	**75,013**	44,250	3,251	1,580	1,440	**24,481**
2021	75,523	44,407	3,271	1,599	1,444	24,786
2022	76,037	44,566	3,292	1,619	1,449	25,095
2023	76,555	44,725	3,312	1,639	1,453	25,408
2024	77,076	44,884	3,332	1,658	1,458	25,725
2025	77,601	45,044	3,353	1,679	1,462	26,046
2026	78,129	45,205	3,374	1,699	1,467	26,370
2027	78,661	45,366	3,395	1,720	1,471	26,699
2028	79,196	45,528	3,416	1,740	1,476	27,032
2029	79,735	45,690	3,437	1,762	1,480	27,369
2030	**80,278**	45,853	3,458	1,783	1,485	**27,711**

Table 4.2.1. Housing Units by County, Municipalities, Tribal Areas, and Unincorporated County, 2020-2030

	Santa Fe County	City of Santa Fe	Town of Edgewood	City of Espanola	Tribal Areas	Unincorporated County
Change, 2020-2030	**5,265**	1,603	207	203	45	**3,230**
% Change, 2020-2030	7.0%	3.6%	6.4%	12.8%	3.1%	13.2%
Growth Rates, 2020 to 2030	1.0068	1.0036	1.0062	1.0121	1.0031	1.0125

Table 4.2.2. Changes and Growth Rates of Housing Units by County, Municipalities, Tribal Areas, and Unincorporated County, 2020-2030

	Santa Fe County	City of Santa Fe	Town of Edgewood	City of Espanola	Tribal Areas	Unincorporated County
New Single Family Detached 2020-2030*	4094	1080	202	176	42	2980
New Multiple Family 2020-2030*	1171	523	5	27	4	250
Total New Housing Units 2020-2030	5265	1603	207	203	45	3230
Total 2030 Single Family Detached*	62427	30898	3379	1549	1370	25564
Total 2030 Multiple Family*	17851	14955	79	234	115	2147
Total 2030 Housing Units	80278	45853	3458	1783	1485	27711
New Single Family Detached 2020-2040*	9129	2345	438	381	91	6439
New Multiple Family 2020-2040*	2537	1135	10	58	8	541
Total New Housing Units 2020-2040	11667	3480	448	438	98	6979
Total 2040 Single Family Detached*	67205	32162	3615	1753	1419	29023
Total 2040 Multiple Family*	19218	15567	84	265	119	2437
Total 2040 Housing Units	86423	47730	3699	2018	1538	31460

Table 4.2.3. Changes and Growth Rates of Housing Units Types by County, Municipalities, Tribal Areas, and Unincorporated County, 2020-2030
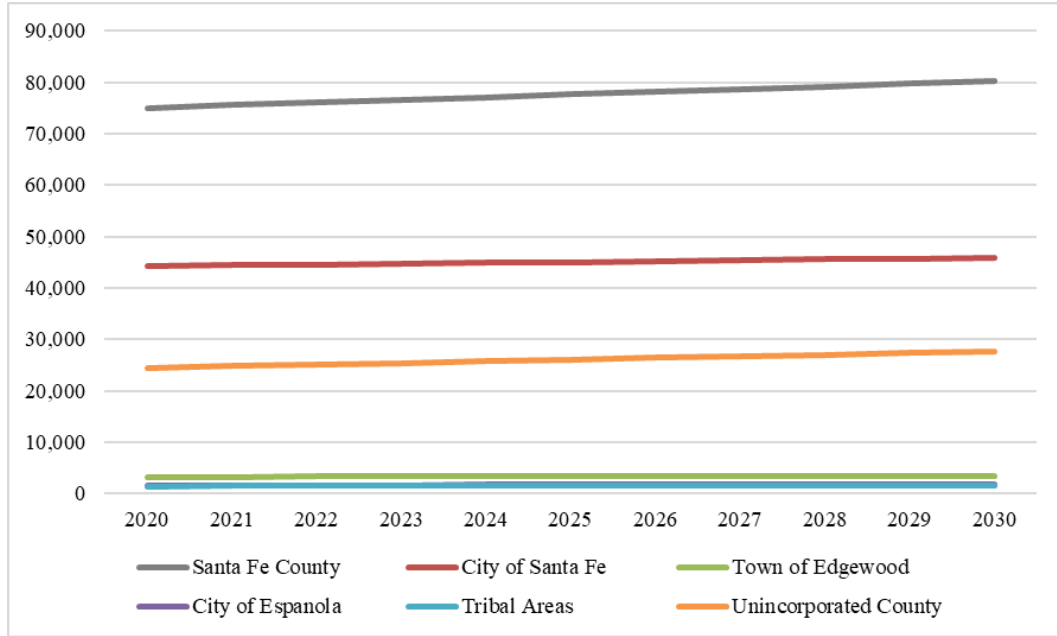
Chart 4.2.1. Housing Units Growth Trends by County, Municipalities, Tribal Areas, and Unincorporated County, 2020-2030
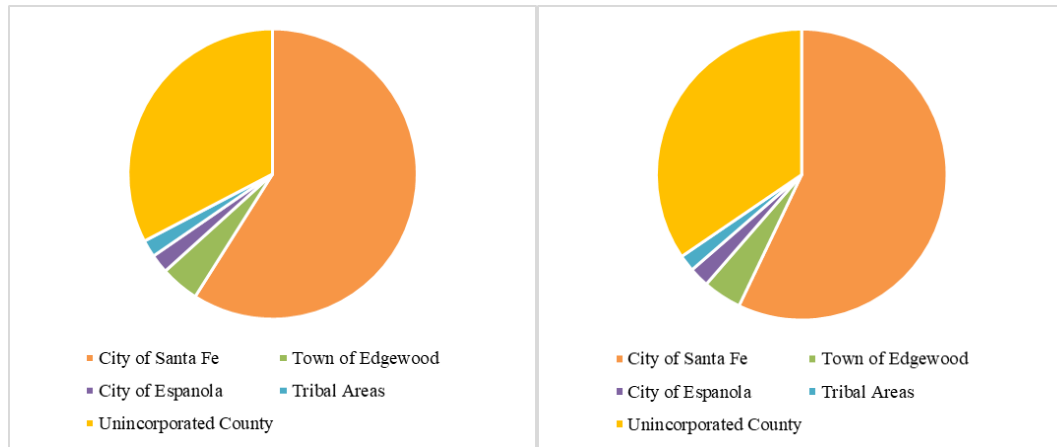

Chart 4.2.2. Housing Units Distribution by County, Municipalities, Tribal Areas, and Unincorporated County, 2020 (Left) & 2030 (Right)

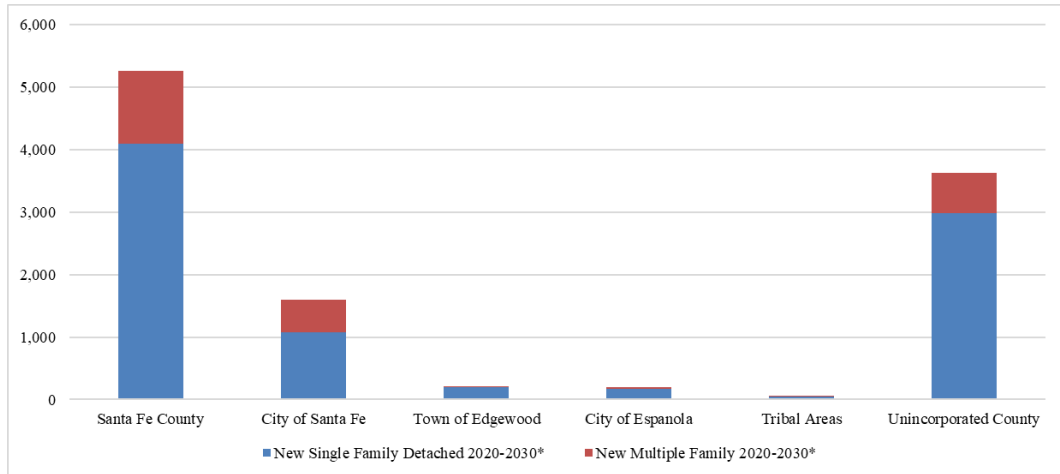**Colors in this pie chart correspond the line colors in Chart 4.2.1.

Chart 4.2.3. New Housing Units Types by County, Municipalities, Tribal Areas, and Unincorporated County, 2020-2030

Table 4.2.1., Table 4.2.2., Table 4.2.3., Chart 4.2.1., Chart 4.2.2., and Chart 4.2.3. show the estimates and forecasts of housing units from 2020 to 2030 for the County, municipalities, tribal areas, and unincorporated county.

In general, the City of Santa Fe and the unincorporated county have the majority of the housing units, while the Town of Edgewood, the City of Espanola and tribal areas only make up of 8.4 percent of the County's total housing units in 2020. The composition is anticipated to remain the same through 2030.

Table 4.2.3. contains detailed information about the composition of housing unit during the projection period.

The unincorporated county has the highest annual housing growth rate among all municipalities at 1.0125 or 1.25 percent. It is expected to increase its initial housing stock of 23,881 by 13.2 percent by the end of projection period, adding 3,230 additional housing units.

The City of Espanola shares the same annual housing growth rate (1.0125as the unincorporated county. The City of Espanola is anticipated to add 203 housing units and grow it housing stock by 12.8 percent by the end of 2030.

The annual growth rate of housing units in Town of Edgewood is anticipated to be 1.0067 (0.67 percent). Edgewood has 3,211 housing units in 2020 and it is expected to add 207 units by 2030.

The City of Santa Fe and the tribal areas are projected to grow their housing units at anannual growth rate of 1.0036 and 1.0031 (0.36 and 0.31 percent) respectively. Total housing units are expected to increase by 1,603 in the City of Santa Fe and 45 in the tribal areas from 2020 to 2030.

b.   Housing Units by Growth Management Areas (GMAs)

Year	El Centro (GMA)	El Norte (GMA)	Estancia (GMA)	Galisteo (GMA)
2020	13,705	4,607	1,202	4,942
2021	13,993	4,613	1,206	4,941
2022	14,287	4,619	1,210	4,940
2023	14,587	4,625	1,214	4,938
2024	14,893	4,631	1,218	4,937
2025	15,206	4,637	1,222	4,936
2026	15,525	4,643	1,226	4,935
2027	15,851	4,649	1,230	4,933
2028	16,184	4,656	1,234	4,932
2029	16,524	4,662	1,238	4,931
2030	16,871	4,668	1,242	4,929

Table 4.2.4. Housing Units by Growth Management Areas (GMAs), 2020-2030

	El Centro (GMA)	El Norte (GMA)	Estancia (GMA)	Galisteo (GMA)
Change, 2020-2030	3,166	61	40	-13
% Change, 2020-2030	23.1%	1.3%	3.4%	-0.3%
Growth Rates, 2020 to 2030	1.0210	1.0013	1.0033	0.9997

Table 4.2.5. Changes and Growth Rates of Housing Units by Growth Management Areas (GMAs), 2020-2030

	El Centro (GMA)	El Norte (GMA)	Estancia (GMA)	Galisteo (GMA)
New Single Family Detached 2020-2030*	2,920	56	37	-12
New Multiple Family 2020-2030*	245	5	3	-1
Total New Housing Units 2020-2030	3,166	61	40	-13
Total 2030 Single Family Detached*	15,564	4,306	1,146	4,547
Total 2030 Multiple Family*	1,307	362	96	382
Total 2030 Housing Units	16,871	4,668	1,242	4,929

Table 4.2.6. Changes and Growth Rates of Housing Units Types by Growth Management Areas (GMAs), 2020-2030
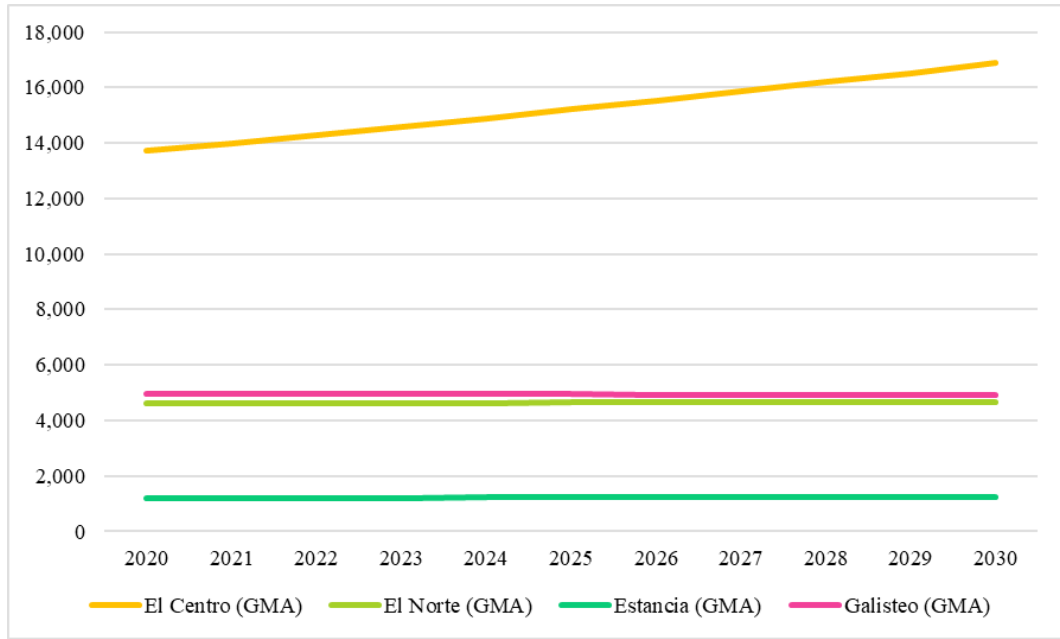
Chart 4.2.4. Housing Units Growth Trends by Growth Management Areas (GMAs), 2020-2030
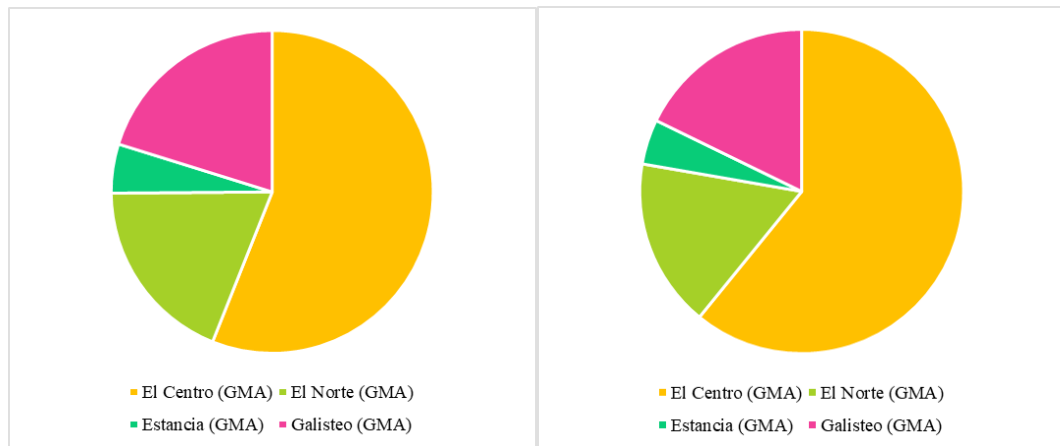
Chart 4.2.5. Housing Units Distribution by Growth Management Areas (GMAs), 2020 (Left) & 2030 (Right)

**Colors in this pie chart correspond the line colors in Chart 4.2.3.
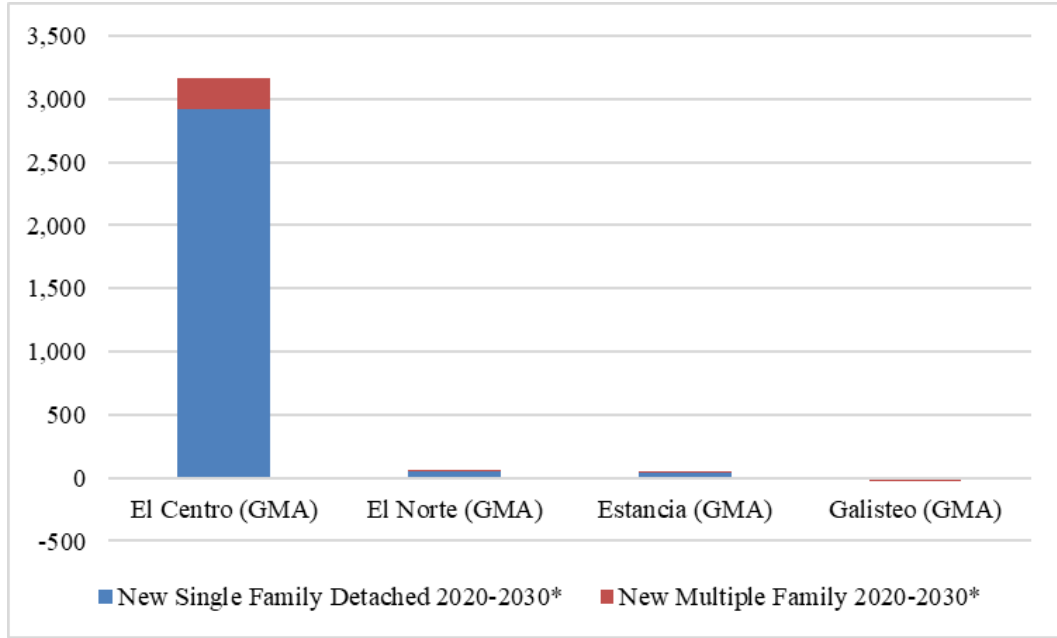
Chart 4.2.6. New Housing Units Types by Growth Management Areas (GMAs), 2020-2030

Table 4.2.4., Table 4.2.5., Table 4.2.6., Chart 4.2.4., Chart 4.2.5., and Chart 4.2.6. show the estimates and forecasts of housing units from 2020 to 2030 for the four GMAs.

The El Centro GMA has the largest base number of housing units (13,705 units in 2020) and is expected to experience substantial growth at an annual rate of 1.0210 (2.10 percent) through 2030. It is anticipated that El Centro will add 3,166 new housing units by 2030.

Housing units in El Norte and Estancia have a relatively low annual growth rate, 1.0013 and 1.0033 (0.13 and 0.33 percent) respectively. Multiplied by their small housing unit base in 2020, the numerical increase in housing units within the two GMAs is expected to be 61 and 40 respectively.

Housing units in the Galisteo GMA are anticipated to experience a minor decline at an annual rate of 0.0003 (-0.03 percent) in the next ten years. This model expects a total loss of 13 housing units in Galisteo by the end of 2030.

c. Housing Units by Sustainable Development Areas (SDAs)

Year	SDA-1	SDA-2	SDA-3
2020	2,647	18,687	3,134
2021	2,737	18,864	3,165
2022	2,831	19,044	3,198
2023	2,928	19,225	3,230
2024	3,028	19,408	3,263
2025	3,131	19,592	3,296
2026	3,238	19,778	3,329
2027	3,349	19,967	3,363
2028	3,463	20,156	3,397
2029	3,581	20,348	3,431
2030	3,704	20,542	3,466

Table 4.2.7. Housing Units by Sustainable Development Areas (SDAs), 2020-2030

	SDA-1	SDA-2	SDA-3
Change, 2020-2030	1,057	1,855	332
% Change, 2020-2030	39.9%	9.9%	10.6%
Growth Rates, 2020 to 2030	1.0342	1.0095	1.0101

Table 4.2.8. Changes and Growth Rates of Housing Units by Sustainable Development Areas (SDAs), 2020-2030

	SDA-1	SDA-2	SDA-3
New Single Family Detached 2020-2030*	906	1,771	317
New Multiple Family 2020-2030*	151	84	15
Total New Housing Units 2020-2030	1,057	1,855	332
Total 2030 Single Family Detached*	3,400	18,959	3,199
Total 2030 Multiple Family*	304	1,583	267
Total 2030 Housing Units	3,704	20,542	3,466

Table 4.2.9. Changes and Growth Rates of Housing Units Types by Sustainable Development Areas (SDAs), 2020-2030
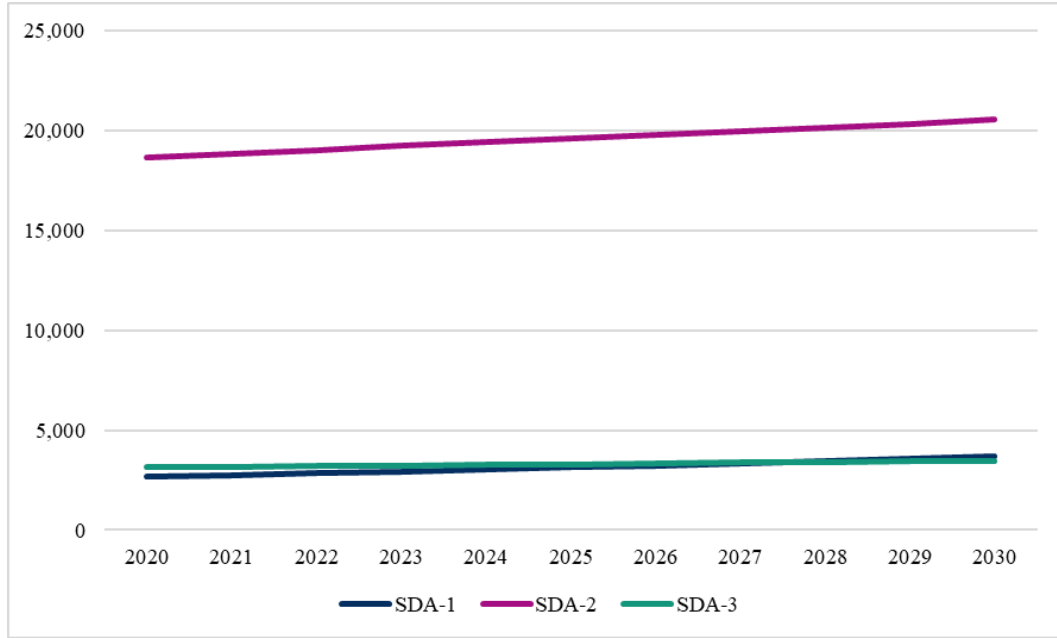
Chart 4.2.7. Housing Units Growth Trends by Sustainable Development Areas (SDAs), 2020-2030
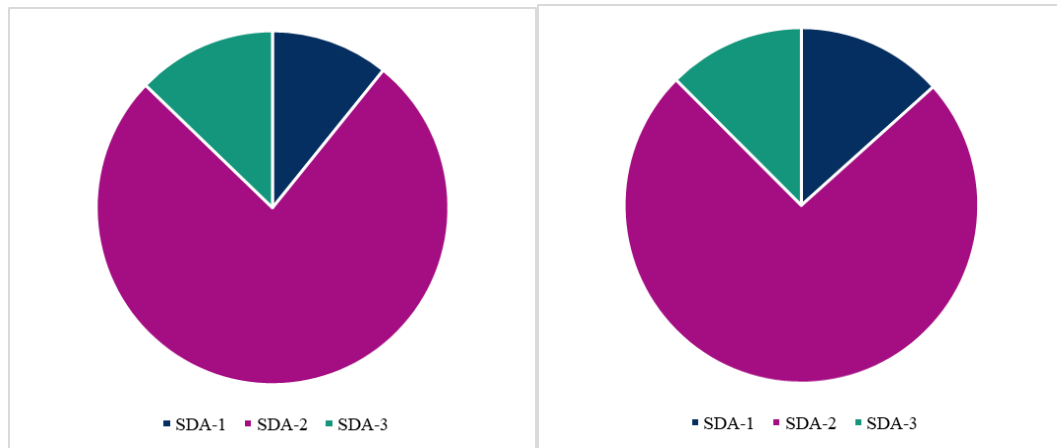
Chart 4.2.8. Housing Units Distribution by Sustainable Development Areas (SDAs), 2020 (Left) & 2030 (Right)

**Colors in this pie chart correspond the line colors in Chart 4.2.7.
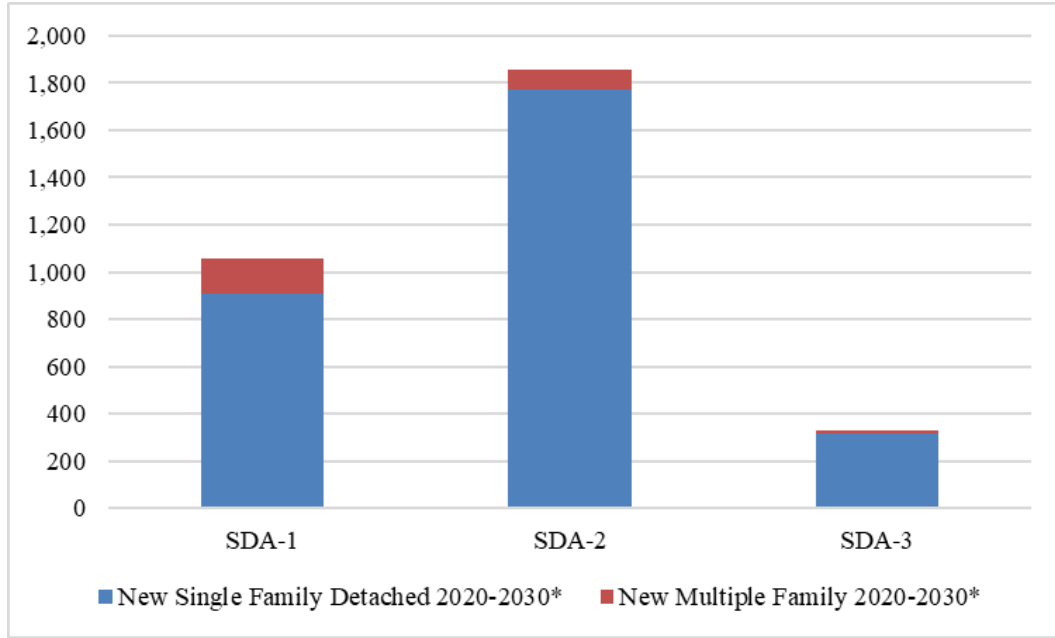
Chart 4.2.9. New Housing Units Types by Sustainable Development Areas (SDAs), 2020-2030

Table 4.2.7., Table 4.2.8., Table 4.2.9., Chart 4.2.7., Chart 4.2.8., and Chart 4.2.9. show the estimates and forecasts of housing units from 2020 to 2030 for the three SDAs.

24.9 percent of the County's housing units are located within SDA-2 (18,687 units in 2020). Housing units in SDA-2 are anticipated to increase at an annual rate of 1.0095 (0.95 percent) between 2020 and 2030.

The annual growth rate in housing within SDA-3 is expected to be 1.0101 or 1.01 percent. Between 2020 and 2030, housing in SDA-3 is expected to grow by 332 units, an increase of 10.6 percent from 3,134 units in 2020.

SDA-1 is expected to grow their housing stock at an annual rate of 1.0342 and 1.0362 (3.42 and 3.62 percent) respectively during the projection period. This represents an increase of 1,057 and 1,130 units respectively. By 2030, the total housing units in SDA-1 is expected to reach 3,704 and 3,771 respectively.

4.3.   Employment

a. Employment by County, Municipalities, Tribal Areas, and Unincorporated County

	Santa Fe County	City of Santa Fe	Town of Edgewood	City of Espanola	Tribal Areas	Unincorporated County
2020	65,456	52,087	1,012	1,051	2,544	8,754
2021	66,083	52,526	1,020	1,069	2,553	8,904
2022	66,717	52,970	1,029	1,087	2,563	9,056
2023	67,356	53,417	1,037	1,106	2,573	9,211
2024	68,002	53,867	1,046	1,125	2,582	9,368
2025	68,654	54,322	1,054	1,144	2,592	9,528
2026	69,312	54,780	1,063	1,164	2,602	9,691
2027	69,976	55,243	1,072	1,184	2,611	9,857
2028	70,647	55,709	1,081	1,204	2,621	10,025
2029	71,324	56,179	1,090	1,225	2,631	10,196
2030	72,008	56,653	1,099	1,246	2,641	10,370

Table 4.3.1. Employment by County, Municipalities, Tribal Areas, and Unincorporated County, 2020-2030

	Santa Fe County	City of Santa Fe	Town of Edgewood	City of Espanola	Tribal Areas	Unincorporated County
2020	32,727,931	26,043,472	505,856	525,595	1,271,894	4,377,234
2021	33,041,643	26,263,231	510,045	534,593	1,276,668	4,452,008
2022	33,358,362	26,484,844	514,269	543,746	1,281,460	4,528,060
2023	33,678,117	26,708,327	518,528	553,054	1,286,270	4,605,411
2024	34,000,936	26,933,696	522,822	562,523	1,291,098	4,684,084
2025	34,326,850	27,160,967	527,152	572,153	1,295,944	4,764,101
2026	34,655,888	27,390,155	531,517	581,948	1,300,808	4,845,484
2027	34,988,080	27,621,278	535,919	591,911	1,305,691	4,928,258
2028	35,323,457	27,854,351	540,357	602,044	1,310,592	5,012,445
2029	35,662,048	28,089,390	544,832	612,351	1,315,511	5,098,071
2030	36,003,884	28,326,413	549,344	622,835	1,320,449	5,185,159

Table 4.3.2. Employment Floor Space (500 Square Feet Per Employee) by County, Municipalities, Tribal Areas, and Unincorporated County, 2020-2030

	Santa Fe County	City of Santa Fe	Town of Edgewood	City of Espanola	Tribal Areas	Unincorporated County
Change, 2020-2030	7,789	4,566	87	194	97	1,616
% Change, 2020-2030	11.9%	8.8%	8.6%	18.5%	3.8%	18.5%
Growth Rates, 2020-2030	1.0096	1.0084	1.0083	1.0171	1.0038	1.0171

Table 4.3.3. Changes and Growth Rates of Employment by County, Municipalities, Tribal Areas, and Unincorporated County, 2020-2030
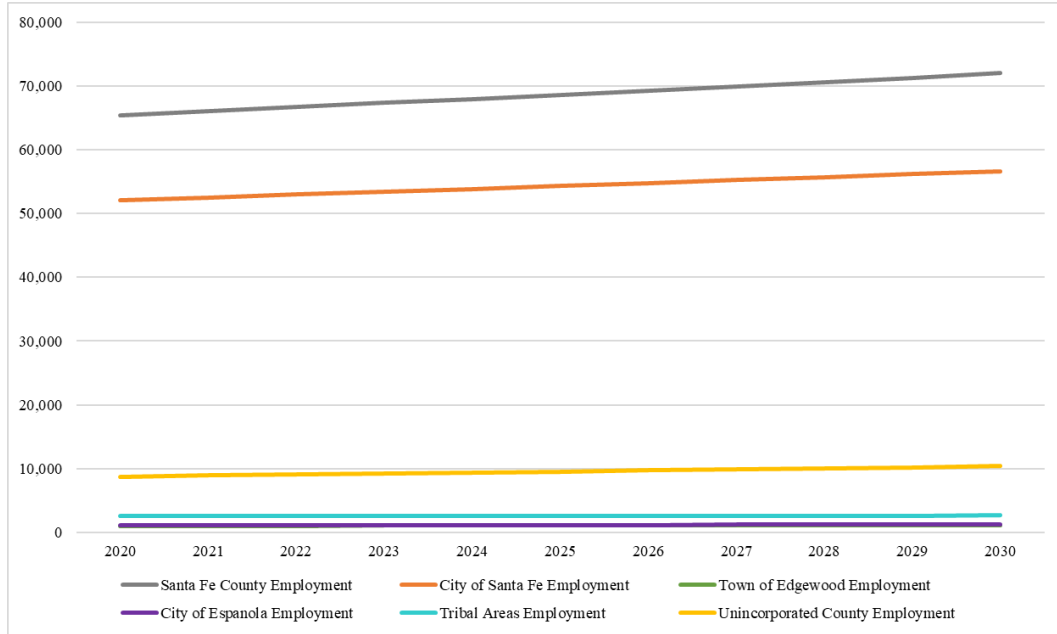
Chart 4.3.1. Employment Growth Trends by County, Municipalities, Tribal Areas, and Unincorporated County, 2020-2030
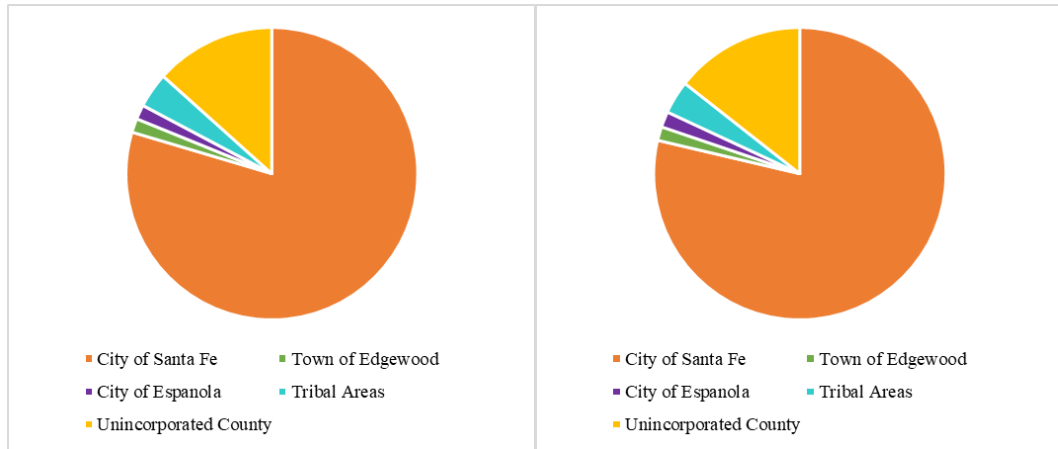
Chart 4.3.2. Employment Distribution by County, Municipalities, Tribal Areas, and Unincorporated County, 2020 (Left) & 2030 (Right)

**Colors in this pie chart correspond the line colors in Chart 4.3.1.

Table 4.3.1., Table 4.3.2., Table 4.3.3., Chart 4.3.1., and Chart 4.3.2 show employment estimates and forecasts from 2020 to 2030 for the County, municipalities, tribal areas, and unincorporated county.

The projections indicate fast employment growth within the County. With an annual

growth rate of 1.0096 (0.96 percent), the model anticipates 7,789 new jobs within the County by 2030, increasing the initial number in 2020 by 11.9 percent.

Most of the numerical growth in employment is expected to occur in the City of Santa Fe. The annual growth rate is estimated to be 1.0084 (0.84 percent), multiplied by a large employment base of 52,087. By 2030, the total employment of the City of Santa Fe is expected to reach 56,653 jobs, with 4,566 added between 2020 and 2030.

Among all the jurisdictions, the City of Espanola and the unincorporated county have the highest employment growth rate. Both jurisdictions are anticipated to grow their employment at an annual rate of 1.0171 (1.71 percent), increasing their total employment by 18.5 percent during the projection period. The Town of Edgewood is also expected to experience fast employment growth at an annual rate of 1.0083 (0.83 percent) and is anticipated to increase its employment by 8.6 percent. However, due to Edgewood's small employment base, this represents a numerical increase of only 87 jobs, the least among all municipalities.

Tribal areas can expect the lowest annual employment growth rate. Starting with 2,544 jobs, the anticipated annual growth rate of employment in tribal areas is 1.0038 (0.38 percent) from 2020 to 2030. Tribal areas are expected to add 97 new jobs during the projection period.

b. Employment by Growth Management Areas (GMAs)

	El Centro (GMA)	El Norte (GMA)	Estanci (GMA)	Galisteo (GMA)
2020	4,889	2,510	130	1,202
2021	4,921	2,589	145	1,217
2022	4,955	2,670	160	1,233
2023	4,988	2,753	178	1,248
2024	5,021	2,839	197	1,264
2025	5,055	2,928	219	1,280
2026	5,089	3,019	242	1,296
2027	5,123	3,113	269	1,312
2028	5,158	3,211	298	1,329
2029	5,192	3,311	330	1,346
2030	5,227	3,414	366	1,363

Table 4.3.4. Employment by Growth Management Areas (GMAs), 2020-2030

	El Centro (GMA)	El Norte (GMA)	Estancia (GMA)	Galisteo (GMA)
2020	2,444,321	1,255,186	65,237	601,023
2021	2,460,745	1,294,385	72,330	608,612
2022	2,477,280	1,334,808	80,194	616,296
2023	2,493,927	1,376,494	88,914	624,077
2024	2,510,684	1,419,482	98,581	631,957
2025	2,527,555	1,463,812	109,300	639,936
2026	2,544,539	1,509,526	121,184	648,016
2027	2,561,637	1,556,669	134,361	656,198
2028	2,578,850	1,605,283	148,969	664,483
2029	2,596,178	1,655,416	165,167	672,873
2030	2,613,623	1,707,114	183,125	681,368

Table 4.3.5. Employment Floor Space (500 Square Feet Per Employee) by Growth Management Areas (GMAs), 2020-2030

	El Centro (GMA)	El Norte (GMA)	Estancia (GMA)	Galisteo (GMA)
Change, 2020-2030	339	904	236	161
% Change, 2020-2030	6.9%	36.0%	180.7%	13.4%
Growth Rates, 2020-2030	1.0067	1.0312	1.1087	1.0126

Table 4.3.6. Changes and Growth Rates of Employment by Growth Management Areas (GMAs), 2020-2030
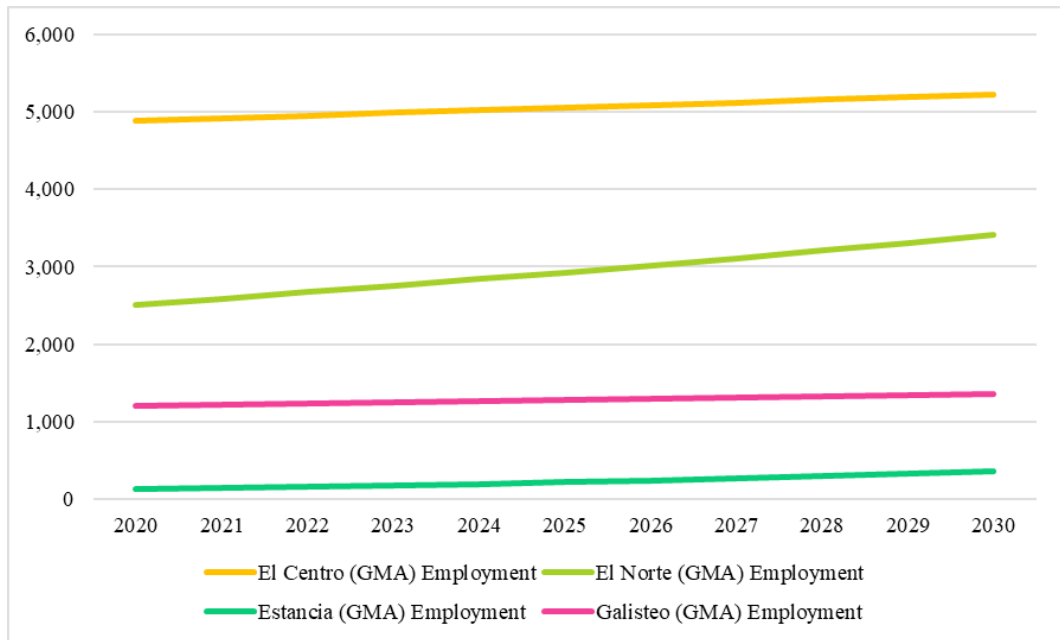

Chart 4.3.3. Employment Growth Trends by Growth Management Areas (GMAs), 2020-2030
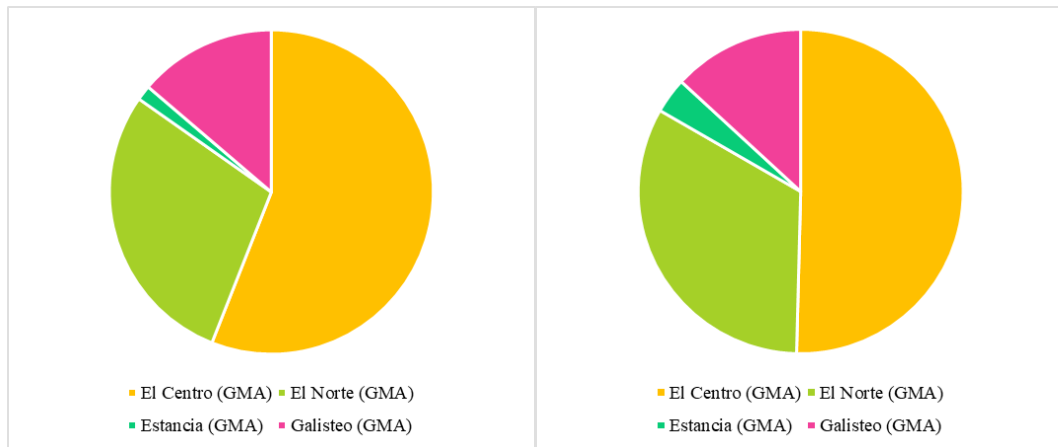
Chart 4.3.4. Employment Distribution by Growth Management Areas (GMAs), 2020 (Left) & 2030 (Right)

**Colors in this pie chart correspond the line colors in Chart 4.3.3.

Table 4.3.4., Table 4.3.5., Table 4.3.6., Chart 4.3.3., and Chart 4.3.4. show employment estimates and forecasts from 2020 to 2030 for the four GMAs.

El Norte and Estancia GMAs are expected to experience the highest annual employment growth with a rate of 1.0312 (3.12 percent) and 1.1087 (10.87 percent) respectively. In these two GMAs, the employment is expected to increase numerically by 36 percent and 180.7 percent by 2030, adding an additional 904 jobs in the El Norte region and 236 jobs in the Estancia region.

El Centro, the largest GMA in the County, has an initial employment of base of 4,889 jobs in 2020. Anticipated to grow at an annual rate of 1.0061 (0.61 percent), this model predicts that El Centro will steadily increase its employment by 6.9 percent from 4,889 to 5,227 during the projection period.

Compared with other GMAs, Galisteo has the smallest employment base and expected employment growth at an annual rate of 1.0126 (1.26 percent), leading to 161 new jobs during the projection period. By 2030, Galisteo's numerical employment will increase by 13.4 percent from 2020.

c. Employment by Sustainable Development Areas (SDAs)

	SDA-1	SDA-2	SDA-3
2020	3,066	5,249	437
2021	3,121	5,345	436
2022	3,177	5,442	435
2023	3,233	5,540	434
2024	3,291	5,641	433
2025	3,350	5,743	432
2026	3,409	5,848	431
2027	3,470	5,954	430
2028	3,532	6,062	429
2029	3,595	6,172	428
2030	3,659	6,284	427

Table 4.3.7. Employment by Sustainable Development Areas (SDAs), 2020-2030

	SDA-1	SDA-2	SDA-3
2020	1,533,128	2,624,652	218,646
2021	1,560,465	2,672,301	218,139
2022	1,588,289	2,720,815	217,634
2023	1,616,610	2,770,210	217,130
2024	1,645,436	2,820,502	216,627
2025	1,674,775	2,871,706	216,125
2026	1,704,638	2,923,840	215,625
2027	1,735,034	2,976,921	215,125
2028	1,765,971	3,030,965	214,627
2029	1,797,460	3,085,991	214,130
2030	1,829,510	3,142,015	213,634

Table 4.3.8. Employment Floor Space (500 Square Feet Per Employee) by Sustainable Development Areas (SDAs), 2020-2030

	SDA-1	SDA-2	SDA-3
Change, 2020-2030	593	1,035	-10
% Change, 2020-2030	19.3%	19.7%	-2.3%
Growth Rates, 2020-2030	1.0178	1.0182	0.9977

Table 4.3.9. Changes and Growth Rates of Employment by Sustainable Development Areas (SDAs), 2020-2030
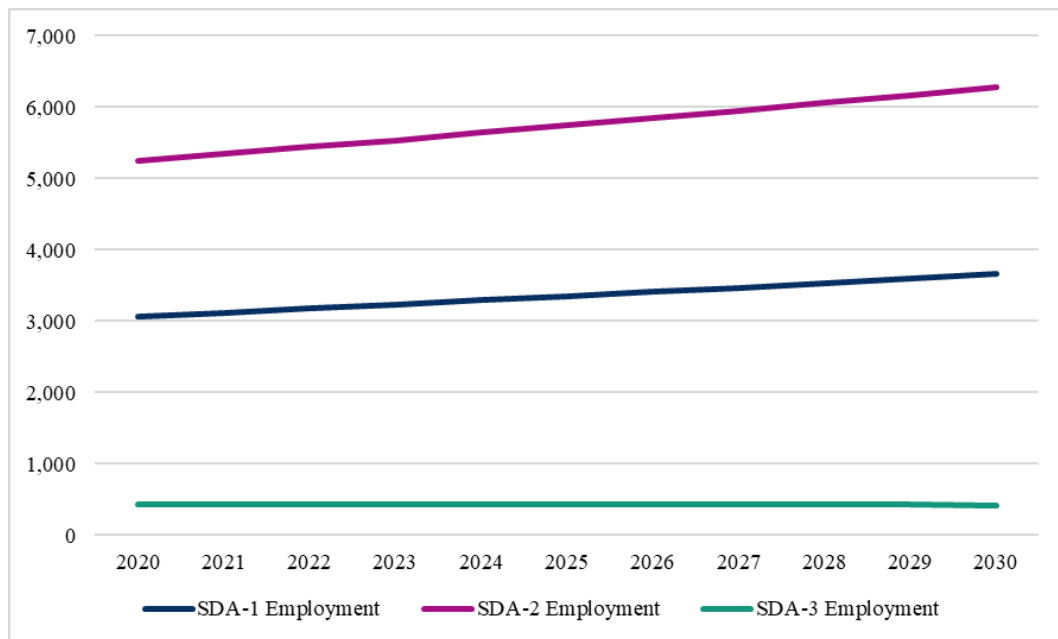
Chart 4.3.5. Employment Growth Trends by Sustainable Development Areas (SDAs), 2020-2030

Chart 4.3.6. Employment Distribution by Sustainable Development Areas (SDAs), 2020 (Left) & 2030 (Right)

**Colors in this pie chart correspond the line colors in Chart 4.3.5.

Table 4.3.8., Table 4.3.9., Table 4.3.10., Chart 4.3.5., and Chart 4.3.6. show employment estimates and forecasts from 2020 to 2030 for the three SDAs.

SDA-1 and SDA-2 share a similar employment growth rate. During the projection period, the employment within SDA-1 is anticipated to increase at an annual rate of 1.0178 (1.78 percent), adding 593 new jobs by 2030. The annual growth rate of employment within SDA-2 is anticipated to be 1.0182 (1.82 percent), adding 1,035 additional jobs by 2030.

SDA-3 is projected to experience a small decline in employment during the next ten years. Its employment has a small base of 437 in 2020, and an annual growth rate of 0.9977 (-0.23 percent) over the projection period. By 2030, SDA-3 is anticipated to lose 2.3 percent of its employment or a total of 10 jobs.

4.4. Land Use Change

Land use change refers to the conversion of a parcel from one land use to another. In the County, the units of demand for single-family and multi-family residential parcels are housing units, while the units of demand for commercial and industrial parcels is employees. Single-family detached includes site-built single-family detached dwellings and mobile homes while multi-family includes apartments and townhouses.

The land consumption for every unit of land demand varies according to zoning. Single-family residential zoning requires 4.9 acres per housing unit; Multi-family residential zoning requires 0.0932 acres per housing unit; and commercial and industrial zoning requires 0.093217 acres per employee.

a. Land Use Change by Unincorporated County

Santa Fe County: Land Use Change Projections (2020-2030) for Unincorporated County and SDA-1 (Water/Wastewater Service Area)			
	Unincorporated County (based on UNM/BBER & GPS projections)		
	Single-Family Residential Housing Units	Multi-Family Residential Housing Units	Commercial and Industrial Employees
Units of Demand	Housing Units	Housing Units	Employees
Land Consumption Per Unit of Demand	4.9 acres per housing unit [1]	0.0932 acres per housing unit [1]	0.093217 acres per employee [3]
Change in Units of Demand, 2020-2030	2,980	250	1,388
Change in Land Use Acres, 2020-2030	14,618.9	23.3	129.4

Table 4.4.1. Land Use Changes by Unincorporated County, 2020-2030

[1] Based on gross densities of single-family detached dwellings permitted after Dec. 8, 2015 (the date the SLDC Zoning Map adoption) on parcels of 50 acres or less, and the gross densities of existing and approved multiple-family development projects as of August 10, 2020 (townhouse and apartment housing unit types). [2] Based on assumptions of employees per acre used in "Santa Fe Infrastructure Buildout Analysis" (Bohannan Huston, March 2017)
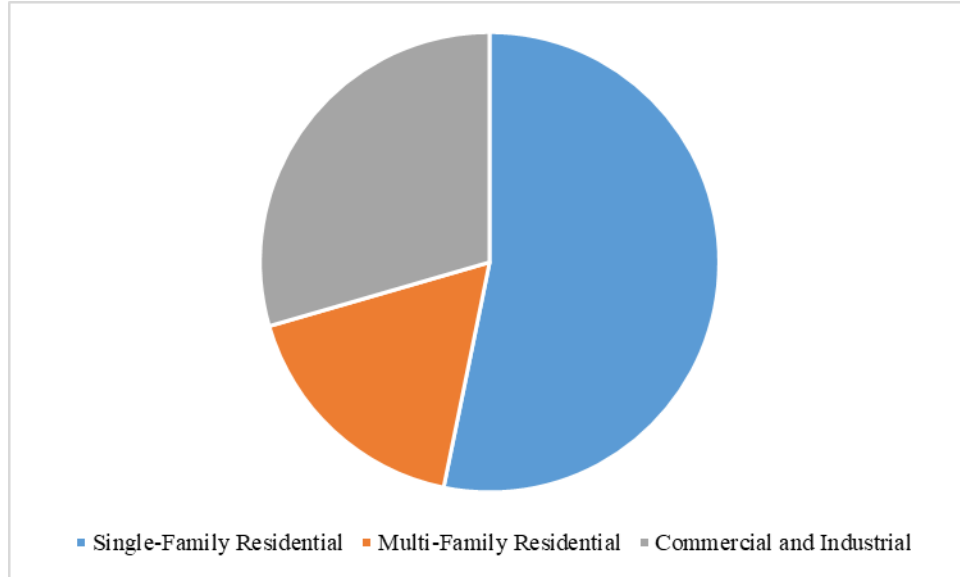
Chart 4.4.1. Change in Land Use Types by Unincorporated County, 2020-2030

Table 4.4.1. shows that the unincorporated county is anticipated to add 2,584 single-family housing units, 646 multi-family housing units, and 1,388 commercial and industrial employees from 2020 to 2030. The unincorporated county will demand 12,676.3 acres for single-family housing, 60.2 acres for multi-family housing, and 129.4 acres of commercial space, to accommodate this growth.

It is anticipated that SDA-1 will add 852 single-family housing units, 277 multi-family housing units, and 472 commercial and industrial employees during the projection period from 2020 to 2030. The demand in land use acres is calculated to be 459.7 acres single-family, 24.8 acres multi-family, and 44 acres commercial.

In the ten-year projection period, SDA-1 will increase by 924 single-family housing units, 301 multi-family housing units, and 555 commercial and industrial employees. Changes in land use within SDA-2 and SDA-3 will be 498.5 acres single-family, 26.9 acres multi-family, and 51.7 acres commercial.

5. DATA

Data displayed in this LUA report is collected from various existing reports prepared for Santa Fe County and adjusted by Santa Fe County Planning Division. Table 5.2.1. is an inventory of data, data source, and data reference, and Table 5.2.2. is an inventory of data format.

Data	Data Source	Data Reference
Shapefiles	Santa Fe County Growth Management Department Planning Division	N/A
Population	a. Decennial census from 1990, 2000, and 2010; b. Microdata utilized by Geospatial and Population Studies group (census tracts and Department of Health "Small Areas") available at http://bber.unm.edu and at www.nm.ibis.gov.	*Population Estimates and Forecasts for: Growth Management Areas, Sustainable Development Areas, and the Water/Wastewater Service Area, County of Santa Fe, 1990-2030.* (University of New Mexico Geospatial and Population Studies, October 28, 2014).
Employment	a. U.S. Department of Commerce; b. Census Bureau; c. Longitudinal Employer-Household Dynamics OnTheMap.	a. *Employment Forecast for Santa Fe County and Santa Fe County Service Areas: 2013 to 2030.* (University of New Mexico Bureau of Business and Economic Research, September 12,

		2014). b. *A memorandum to Santa Fe County; EPS #173058.* (Economic & Planning Systems, November 28, 2018).
Housing Unit	c. Decennial census from 1990, 2000, and 2010; d. Microdata utilized by Geospatial and Population Studies group (census tracts and Department of Health "Small Areas") available at http://bber.unm.edu and at www.nm.ibis.gov.	*Population Estimates and Forecasts for: Growth Management Areas, Sustainable Development Areas, and the Water/Wastewater Service Area, County of Santa Fe, 1990-2030.* (University of New Mexico Geospatial and Population Studies, October 28, 2014).
Land Use Change	a. Decennial census from 1990, 2000, and 2010; b. Microdata utilized by Geospatial and Population Studies group (census tracts and Department of Health "Small Areas") available at http://bber.unm.edu and at www.nm.ibis.gov; c. U.S. Department of Commerce;	a. *Population Estimates and Forecasts for: Growth Management Areas, Sustainable Development Areas, and the Water/Wastewater Service Area, County of Santa Fe, 1990-2030.* (University of New Mexico Geospatial and Population Studies, October 28, 2014). b. *Employment Forecast*

	d. Census Bureau; e. Longitudinal Employer-Household Dynamics OnTheMap; f. U.S. Census 2018 American Community Survey.	*for Santa Fe County and Santa Fe County Service Areas: 2013 to 2030.* (University of New Mexico Bureau of Business and Economic Research, September 12, 2014). c. *Santa Fe Infrastructure Buildout Analysis.* (Bohannan Huston, March 2017)

Table 5.2.1. Inventory of Data, Data Source, and Data Reference

Data	**Data Format**
Population	Number of People (Integer)
Employment	Number of Employee (Integer)
Employment Space	Number of Average Square Feet Per Employee (Integer)
Housing Unit	Number of dwelling units, both single and multi-family (Integer)
Changes in Units of Demand	Number of housing unit or employee (Integer)
Change in Land Use Acres	Land Area in Acres (1 d.p.)
% Change	Percentage Change (1 d.p.)
Growth Rate	Growth Rate (4 d.p.)

Table 5.2.1. Inventory of Data Format

6. APPENDIX

6.1. Population Projections

Santa Fe County: Population Projections (2020-2030) by Geography

Year	Santa Fe County	City of Santa Fe	Town of Edgewood	City of Espanola	Tribal Areas	Unincorporated County	Year	SDA-1	SDA-2	SDA-3
2020	152,106	85,667	6,227	3,414	3,549	53,227	2020	8,671	38,542	5,959
2021	153,141	85,974	6,278	3,458	3,560	53,840	2021	8,961	38,839	5,965
2022	154,183	86,283	6,329	3,502	3,572	54,460	2022	9,261	39,138	5,971
2023	155,233	86,593	6,381	3,548	3,583	55,088	2023	9,571	39,440	5,977
2024	156,290	86,903	6,433	3,593	3,594	55,723	2024	9,891	39,743	5,984
2025	157,353	87,215	6,486	3,640	3,605	56,365	2025	10,222	40,050	5,990
2026	158,424	87,529	6,539	3,687	3,617	57,014	2026	10,564	40,358	5,996
2027	159,503	87,843	6,593	3,734	3,628	57,671	2027	10,917	40,669	6,002
2028	160,588	88,158	6,647	3,783	3,639	58,335	2028	11,282	40,983	6,008
2029	161,681	88,475	6,701	3,831	3,651	59,008	2029	11,660	41,298	6,015
2030	162,782	88,792	6,756	3,881	3,662	59,688	2030	12,050	41,617	6,021

	Santa Fe County	City of Santa Fe	Town of Edgewood	City of Espanola	Tribal Areas	Unincorporated County		SDA-1	SDA-2	SDA-3
Change, 2020-2030	**10,676**	3,125	529	467	113	**6,461**	**Change, 2020-2030**	3,379	3,075	62
% Change, 2020-2030	7.0%	3.6%	8.5%	13.7%	3.2%	12.1%	**% Change, 2020-2030**	39.0%	8.0%	1.0%
Growth Rates, 2020 to 2030	1.0068	1.0036	1.0082	1.0129	1.0031	1.0115	**Growth Rates, 2020 to 2030**	1.0335	1.0077	1.0010

Population estimates and projections and growth rates are derived from the publication "Population Estimates and Forecasts for: Growth Management Areas, Sustainable Development Areas, and the Water/Wastewater Service Area, County of Santa Fe, 1990-2030" (University of New Mexico Geospatial and Population Studies, October 28, 2014). The base year was then reset to 2018, using U.S. Census 2018 population estimates for Santa Fe County and its municipalities. The growth rates were then rescaled based on the University of New Mexico 2000-2040 population estimates and projections for New Mexico counties (UNM Geospatial and Population Studies, February 2017).
Santa Fe County Planning Division, August 10, 2020.

6.2. Housing Units Projections

Santa Fe County: Housing Units Projections (2020-2030) by Geography

Year	Santa Fe County	City of Santa Fe	Town of Edgewood	City of Espanola	Tribal Areas	Unincorporated County	Year	El Centro (GMA)	El Norte (GMA)	Estancia (GMA)	Galisteo (GMA)	SDA-1	SDA-2	SDA-3
2020	75,013	44,250	3,251	1,580	1,440	24,481	2020	13,705	4,607	1,202	4,942	2,647	18,687	3,134
2021	75,523	44,407	3,271	1,599	1,444	24,786	2021	13,993	4,613	1,206	4,941	2,737	18,864	3,165
2022	76,037	44,566	3,292	1,619	1,449	25,095	2022	14,287	4,619	1,210	4,940	2,831	19,044	3,198
2023	76,555	44,725	3,312	1,639	1,453	25,408	2023	14,587	4,625	1,214	4,938	2,928	19,225	3,230
2024	77,076	44,884	3,332	1,658	1,458	25,725	2024	14,893	4,631	1,218	4,937	3,028	19,408	3,263
2025	77,601	45,044	3,353	1,679	1,462	26,046	2025	15,206	4,637	1,222	4,936	3,131	19,592	3,296
2026	78,129	45,205	3,374	1,699	1,467	26,370	2026	15,525	4,643	1,226	4,935	3,238	19,778	3,329
2027	78,661	45,366	3,395	1,720	1,471	26,699	2027	15,851	4,649	1,230	4,933	3,349	19,967	3,363
2028	79,196	45,528	3,416	1,740	1,476	27,032	2028	16,184	4,656	1,234	4,932	3,463	20,156	3,397
2029	79,735	45,690	3,437	1,762	1,480	27,369	2029	16,524	4,662	1,238	4,931	3,581	20,348	3,431
2030	80,278	45,853	3,458	1,783	1,485	27,711	2030	16,871	4,668	1,242	4,929	3,704	20,542	3,466

	Santa Fe County	City of Santa Fe	Town of Edgewood	City of Espanola	Tribal Areas	Unincorporated County		El Centro (GMA)	El Norte (GMA)	Estancia (GMA)	Galisteo (GMA)	SDA-1	SDA-2	SDA-3
Change, 2020-2030	5,265	1,603	207	203	45	3,230	Change, 2020-2030	3,166	61	40	-13	1,057	1,855	332
% Change, 2020-2030	7.0%	3.6%	6.4%	12.8%	3.1%	13.2%	% Change, 2020-2030	23.1%	1.3%	3.4%	-0.3%	39.9%	9.9%	10.6%
Growth Rates, 2020 to 2030	1.0068	1.0036	1.0062	1.0121	1.0031	1.0125	Growth Rates, 2020 to 2030	1.0210	1.0013	1.0033	0.9997	1.0342	1.0095	1.0101

	Santa Fe County	City of Santa Fe	Town of Edgewood	City of Espanola	Tribal Areas	Unincorporated County		El Centro (GMA)	El Norte (GMA)	Estancia (GMA)	Galisteo (GMA)	SDA-1	SDA-2	SDA-3
New Single Family Detached 2020-2030*	4,213	1,283	165	162	36	2,584	New Single Family Detached 2020-2030*	2,533	49	32	-10	845	1,484	266
New Multiple Family 2020-2030*	1,053	320	41	41	9	646	New Multiple Family 2020-2030*	633	12	8	-3	211	371	66
Total New Housing Units 2020-2030	5,265	1,603	207	203	45	3,230	Total New Housing Units 2020-2030	3,166	61	40	-13	1,057	1,855	332
Total 2030 Single Family Detached*	64,231	36,687	2,767	1,427	1,188	22,171	Total 2030 Single Family Detached*	13,499	3,735	994	3,944	2,963	16,435	2,773
Total 2030 Multiple Family*	16,047	9,166	691	356	297	5,539	Total 2030 Multiple Family*	3,373	933	248	985	740	4,106	693
Total 2030 Housing Units	80,278	45,853	3,458	1,783	1,485	27,711	Total 2030 Housing Units	16,871	4,668	1,242	4,929	3,704	20,542	3,466

Housing estimates and projections and growth rates are derived from the publication "Population Estimates and Forecasts for: Growth Management Areas, Sustainable Development Areas, and the Water/Wastewater Service Area, County of Santa Fe, 1990-2030" (University of New Mexico Geospatial and Population Studies, October 28, 2014).

The base year was then reset to 2018, using U.S. Census 2018 population estimates for Santa Fe County and its municipalities. The growth rates were then rescaled based on the University of New Mexico 2000-2040 population estimates and projections for New Mexico counties (UNM Geospatial and Population Studies, February 2017).

[1] Percentages of single-family housing units and multi-family housing units are based on the U.S. Census 2018 American Community Survey proportions for Santa Fe County and its municipalities. "Single-Family Detached" includes site-built single-family detached dwellings and mobile/manufactured homes. "Multiple-Family" includes apartments and townhouses.

[2] Percentages of new single-family housing units (47.4%) and new multi-family housing units (52.6%) are based on the "Santa Fe Infrastructure Buildout Analysis" (Bohannan Huston, March 2017), for the Mixed-Use zoning district portions of SDA-1. For the Santa Fe Community College District (SFCCD) portion of SDA-1, the proportion of multi-family on the proportions of same in existing development projects in the SFCCD. Santa Fe County Planning Division, September 14, 2020

6.3.   Employment Projections

Santa Fe County: Employment Projections (2020-2030) by Geography

	Santa Fe County	City of Santa Fe	Town of Edgewood	City of Espanola	Tribal Areas	Unincorporated County	El Centro (GMA)	El Norte (GMA)	Estancia (GMA)	Galisteo (GMA)	SDA-1	SDA-2	SDA-3
2020	65,456	52,087	1,012	1,051	2,544	8,754	4,889	2,510	130	1,202	3,066	5,249	437
2021	66,083	52,526	1,020	1,069	2,553	8,904	4,921	2,589	145	1,217	3,121	5,345	436
2022	66,717	52,970	1,029	1,087	2,563	9,056	4,955	2,670	160	1,233	3,177	5,442	435
2023	67,356	53,417	1,037	1,106	2,573	9,211	4,988	2,753	178	1,248	3,233	5,540	434
2024	68,002	53,867	1,046	1,125	2,582	9,368	5,021	2,839	197	1,264	3,291	5,641	433
2025	68,654	54,322	1,054	1,144	2,592	9,528	5,055	2,928	219	1,280	3,350	5,743	432
2026	69,312	54,780	1,063	1,164	2,602	9,691	5,089	3,019	242	1,296	3,409	5,848	431
2027	69,976	55,243	1,072	1,184	2,611	9,857	5,123	3,113	269	1,312	3,470	5,954	430
2028	70,647	55,709	1,081	1,204	2,621	10,025	5,158	3,211	298	1,329	3,532	6,062	429
2029	71,324	56,179	1,090	1,225	2,631	10,196	5,192	3,311	330	1,346	3,595	6,172	428
2030	72,008	56,653	1,099	1,246	2,641	10,370	5,227	3,414	366	1,363	3,659	6,284	427
	Santa Fe County	City of Santa Fe	Town of Edgewood	City of Espanola	Tribal Areas	Unincorporated County	El Centro (GMA)	El Norte (GMA)	Estancia (GMA)	Galisteo (GMA)	SDA-1	SDA-2	SDA-3
Change, 2020-2030	7,789	4,566	87	194	97	1,616	339	904	236	161	593	1,035	-10
% Change, 2020-2030	11.9%	8.8%	8.6%	18.5%	3.8%	18.5%	6.9%	36.0%	180.7%	13.4%	19.3%	19.7%	-2.3%
Growth Rates, 2020-2030	1.0096	1.0084	1.0083	1.0171	1.0038	1.0171	1.0067	1.0312	1.1087	1.0126	1.0178	1.0182	0.9977

Employment estimates and projections and growth rates are derived from the publication "Employment Forecast for Santa Fe County and Santa Fe County Service Areas: 2013 to 2030" (University of New Mexico Bureau of Business and Economic Research, September 12, 2014). The base year was then reset to 2018, using U.S. Census 2018 population estimates for Santa Fe County and its municipalities. The growth rates were then rescaled based on the University of New Mexico 2000-2040 population estimates and projections for New Mexico counties (UNM Geospatial and Population Studies, February 2017).500 square feet per employee was assumed, based on the memorandum from Economic & Planning Systems to Santa Fe County (re: EPS #173058), dated November 28, 2018.
Santa Fe County Planning Division, August 10, 2020

6.4. Land Use Change Projections

Santa Fe County: Land Use Change Projections (2020-2030) for Unincorporated County and SDA-1 (Water/Wastewater Service Area)			
	Unincorporated County (based on UNM/BBER & GPS projections)		
	Single-Family Residential Housing Units	Multi-Family Residential Housing Units	Commercial and Industrial Employees
Units of Demand	Housing Units	Housing Units	Employees
Land Consumption Per Unit of Demand	4.9 acres per housing unit [1]	0.0932 acres per housing unit [1]	0.093217 acres per employee [3]
Change in Units of Demand, 2020-2030	2,980	250	1,388
Change in Land Use Acres, 2020-2030	14,618.9	23.3	129.4

"UNM/BBER & GPS projections" refer to the documents "Population Estimates and Forecasts for: Growth Management Areas, Sustainable Development Areas, and the Water/Wastewater Service Area, County of Santa Fe, 1990-2030" (University of New Mexico Geospatial and Population Studies, October 28, 2024), and "Employment Forecast for Santa Fe County and Santa Fe County Service Areas: 2013 to 2030" (University of New Mexico, Bureau of Economic & Business Research, September 12, 2014).

The base year for the UNM/BBER & GPS projections was reset to 2018, using the 2018 U.S. Census population estimates for Santa Fe County and its municipalities, and the projections were then rescaled based on the University of New Mexico 2000-2040 population estimates and projections for New Mexico counties (UNM Geospatial and Population Studies, February 2017).

[1] Based on gross densities of single-family detached dwellings permitted after Dec. 8, 2015 (the date the SLDC Zoning Map adoption) on parcels of 50 acres or less, and the gross densities of existing and approved multiple-family development projects as of August 10, 2020 (townhouse and apartment housing unit types).

[2] Based on assumptions of employees per acre used in "Santa Fe Infrastructure Buildout Analysis" (Bohannan Huston, March 2017)

Santa Fe County Planning Division, September 14, 2020