

City of Fulshear

Demographic Update

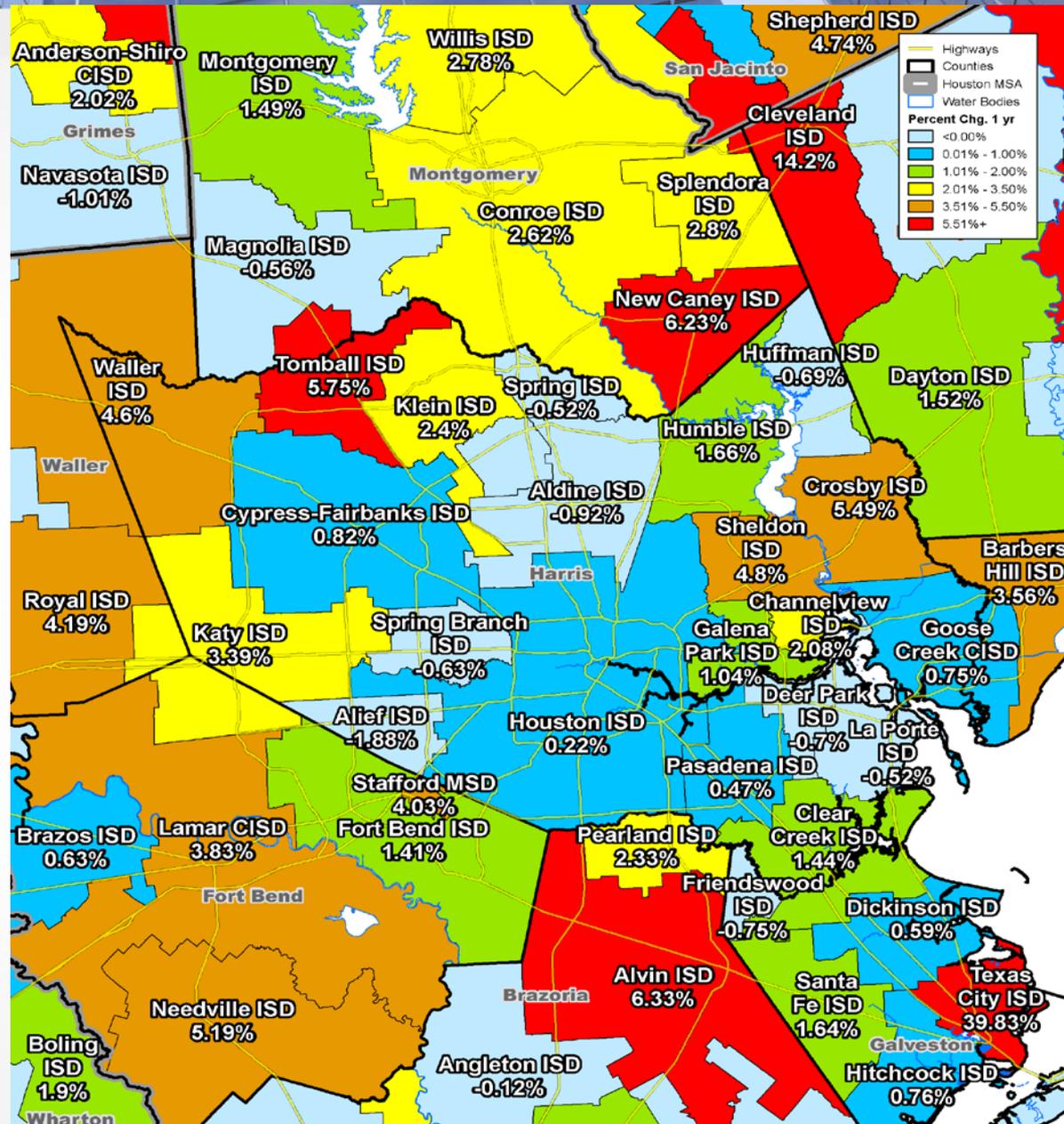
Summer 2017



Percent Change in Student Enrollment

Fall 2015 to Fall 2016

- PEIMS enrollment



Demographic Characteristics

City of Fulshear



Median Age 35.2

Houston Metro 34.1

Bachelor's Degree or Higher

58.7%

Houston Metro
30.60%



Population Ages 5–17

27.2%

Houston Metro 20%



Mean Travel Time to Work

37.4

Houston Metro
30.2 minutes



Median Household Income

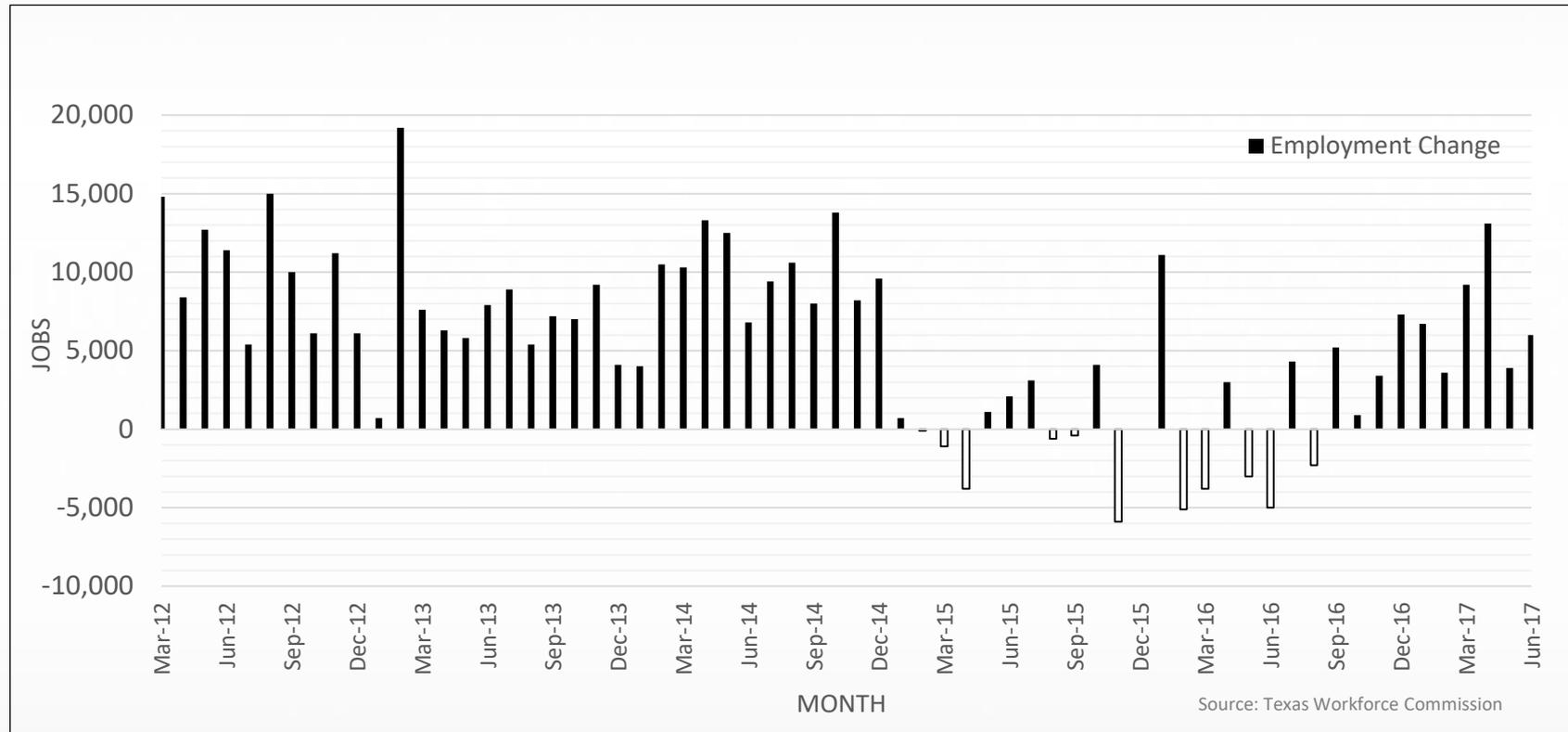


\$175,990

Houston Metro \$61,465

Monthly Employment Change

Houston Metro, Seasonally Adjusted



Housing Growth

Through 2021

- Tamarron = 1,411 housing occupancies projected
- Jordan Ranch = 910
- Cross Creek = 993
 - 310 (31%) of which will be age-restricted

Housing Growth

Post-2021 through 2026

- Tamarron and Jordan Ranch continue to dominate the market with 1,417 and 1,450 additional SF units, respectively.
- Highland Management dev. ramps up
- Harrison Tracts along Westpark Tollway
- LID 21 is in the planning stage
 - 4,626 acres known as Foster Farms
 - ~3,150 developable acres exists behind future levee

Most Active Residential Developments June 2017 – Oct. 2026

SINGLE FAMILY

Five Largest Single-Family Developments	2016-2021	2021-2026	2016-2026
Tamarron	1,411	1,417	2,828
Jordan Ranch	910	1,450	2,360
Cross Creek Ranch	993	1,012	2,005
Foster Farms	120	1,310	1,430
Harrison Interests Tract	100	960	1,060
Total Projected New Single-Family Occupancies	6,531	12,352	18,883

MULTI- FAMILY

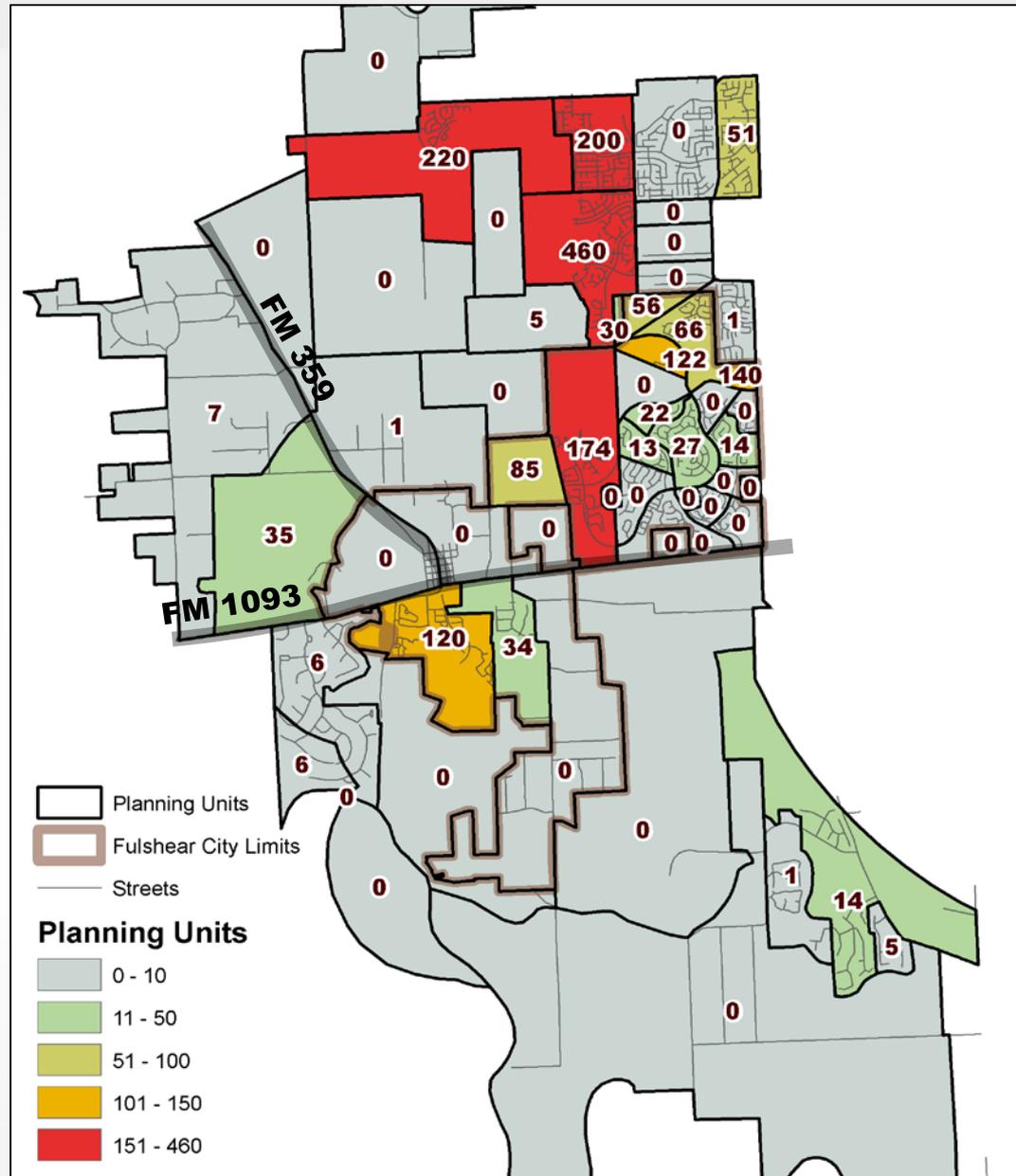
Five Largest Multi-Family Developments	2016-2021	2021-2026	2016-2026
Cross Creek Ranch (PU H19/H20)	250	450	700
Jordan Ranch MF	60	400	460
Park Lane Fulshear (Cross Creek)	380	0	380
Fulshear Lakes	75	300	375
Potential MF in PU B03	25	300	325
Total Projected New Multi-Family Occupancies	940	1,625	2,565

Projected New Housing Occupancies June 2017 – Oct. 2026

	Single Family	Multi-Family	Mixed Use / Condo	Age-Restricted	Grand Total
Jan 2017-Oct 2017	703	0	0	33	736
Oct 2017-Oct 2018	968	140	0	71	1,179
Oct 2018-Oct 2019	1,289	260	50	98	1,697
Oct 2019-Oct 2020	1,476	280	80	110	1,946
Oct 2020-Oct 2021	1,678	260	125	105	2,168
Oct 2021-Oct 2022	1,990	225	150	115	2,480
Oct 2022-Oct 2023	2,206	250	175	111	2,742
Oct 2023-Oct 2024	2,401	400	170	93	3,064
Oct 2024-Oct 2025	2,653	375	205	77	3,310
Oct 2025-Oct 2026	2,678	375	215	28	3,296
Jan 2017-Oct 2021	6,114	940	255	417	7,726
Oct 2021-Oct 2026	11,928	1,625	915	424	14,892
Jan 2017-Oct 2026	18,042	2,565	1,170	841	22,618

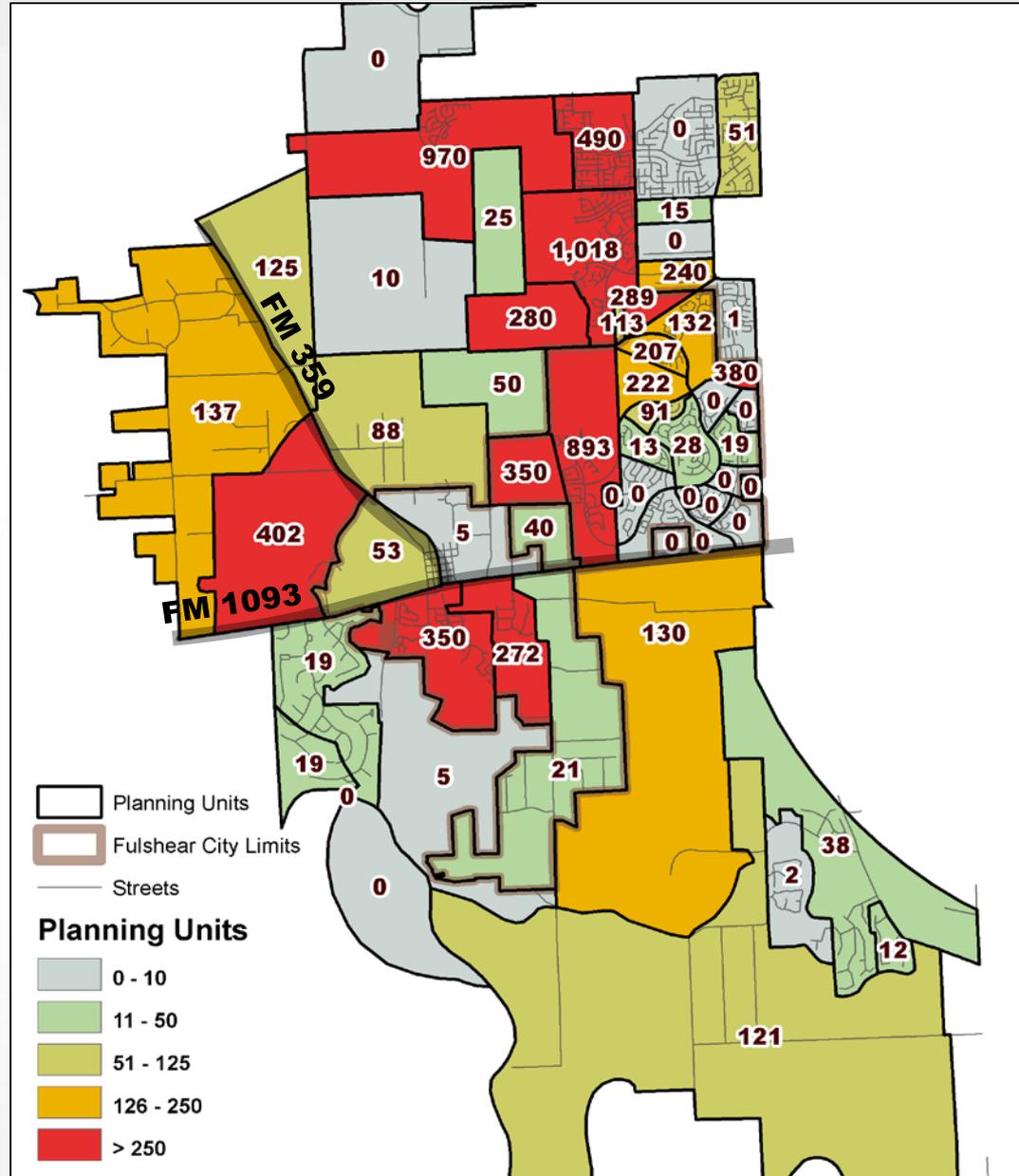
Projected New Housing Occupancies

Jan. 2017–Oct. 2018



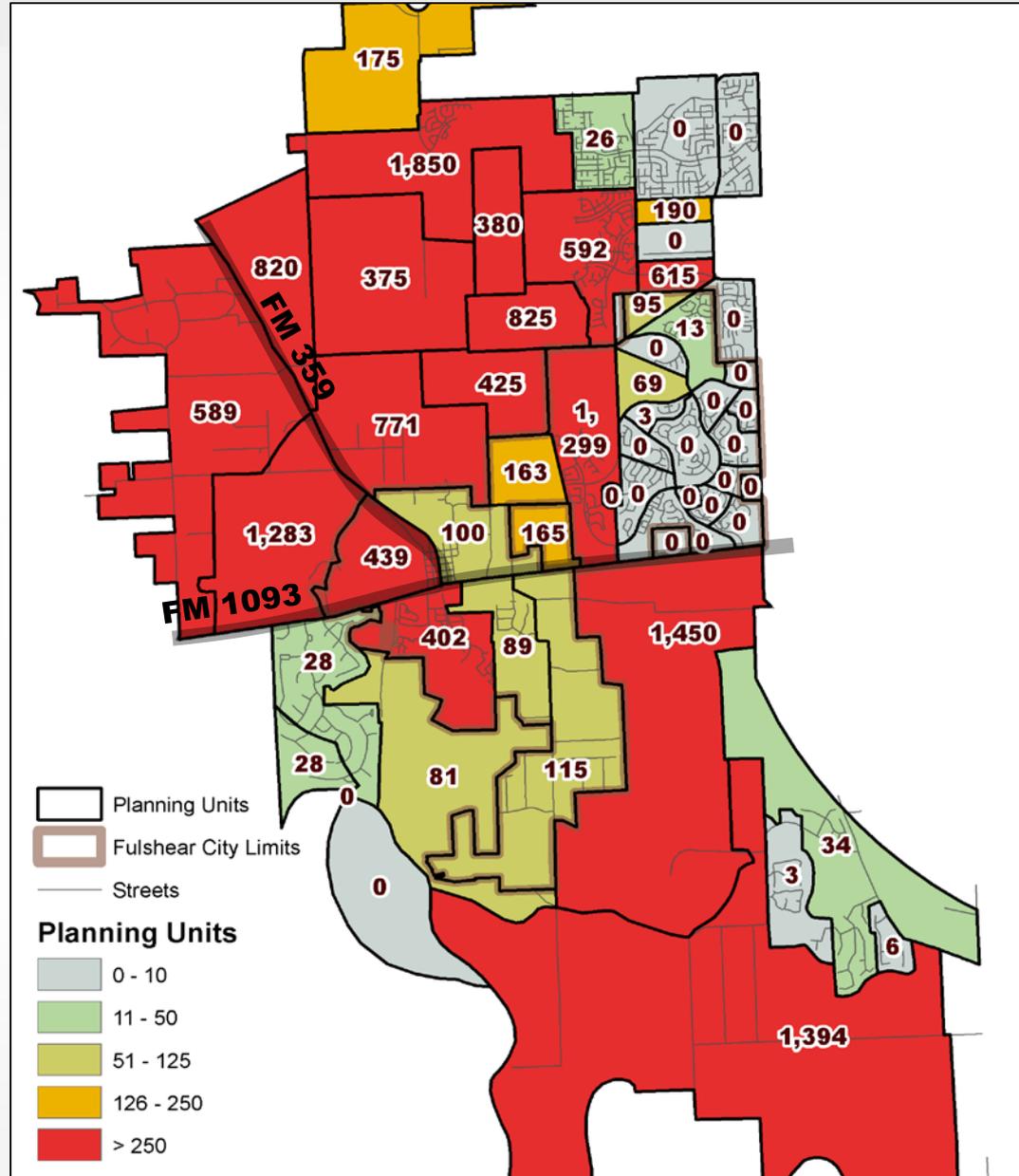
Projected New Housing Occupancies

Jan. 2017–Oct. 2021



Projected New Housing Occupancies

Oct. 2021–Oct. 2026



Typical Household Size

Housing Type	Typical Household Size
Multi-Family, majority 1-bedroom	1.55–1.85
Multi-Family, majority 2+ bedroom	1.85–2.25
Single-Family, Family Oriented	3.15–3.30 initially; 3.30–3.50 at peak
Single-Family, Age-Restricted 55+	1.65–1.80
Single-Family, Acreage/Rural Estate	2.65–2.85

Students per Occupied Home by School District

Katy ISD = 0.72 overall

- Cinco Ranch/Cross Creek = 0.90 to 1.40

Lamar CISD = 0.58 overall

- Cross Creek = 0.10 to 0.25
- Tamarron /Fulbrook on F.C.= 0.4 to 0.55
- Lakes of Bella Terra = 0.3 to 0.55

Recent Flood Events

Brazos River

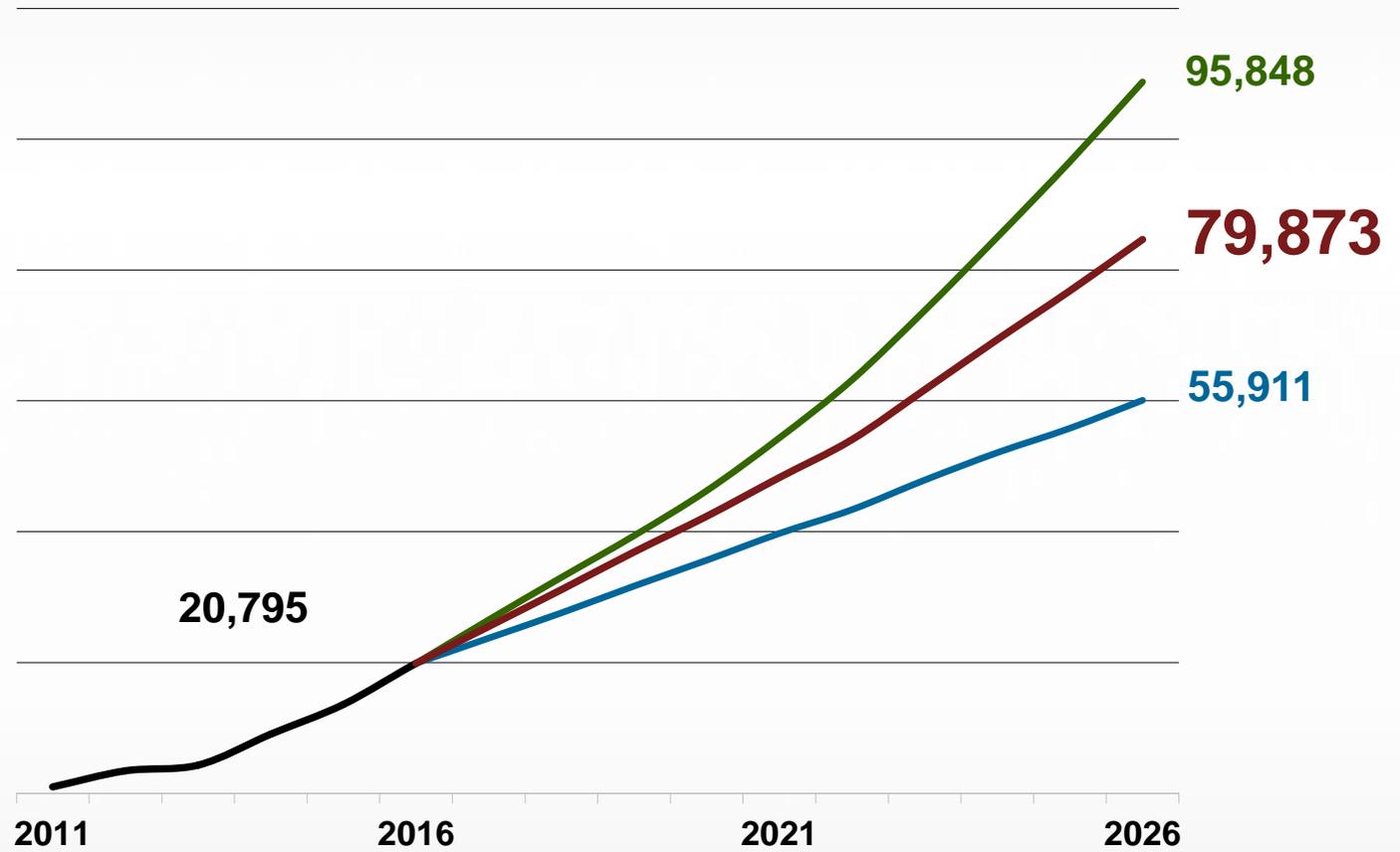
- Levee jitters—Foster Farms, etc.

Barker Reservoir – south of Katy Frwy.

- Future buyouts in KISD/SBISD/HISD possible; these could have a domino effect, increasing housing demand in Fulshear
 - 4,600 flooded SF & MF units east of dam
 - 7,500 affected SF homes west of dam

Three Scenarios of Growth

Population of City & ETJ



Three Scenarios of Growth

	2017	2018	2019	2020	2021	2022	2023	2024	2025
Low									
Population	23,138	26,312	30,210	34,313	37,837	41,538	44,651	47,540	52,310
% Growth	0.11	0.14	0.15	0.14	0.10	0.10	0.07	0.06	0.10
Growth	2,343	3,174	3,898	4,103	3,524	3,701	3,113	2,889	4,770
Moderate									
Population	23,254	26,849	31,634	36,896	42,513	48,868	55,814	63,386	71,658
% Growth	0.12	0.15	0.18	0.17	0.15	0.15	0.14	0.14	0.13
Growth	2,459	3,595	4,785	5,262	5,617	6,355	6,946	7,572	8,272
High									
Population	23,370	27,252	32,583	38,741	45,489	54,243	63,070	72,894	85,273
% Growth	0.12	0.17	0.20	0.19	0.17	0.19	0.16	0.16	0.17
Growth	2,575	3,882	5,331	6,158	6,748	8,754	8,827	9,824	12,379

Population Projections by Community

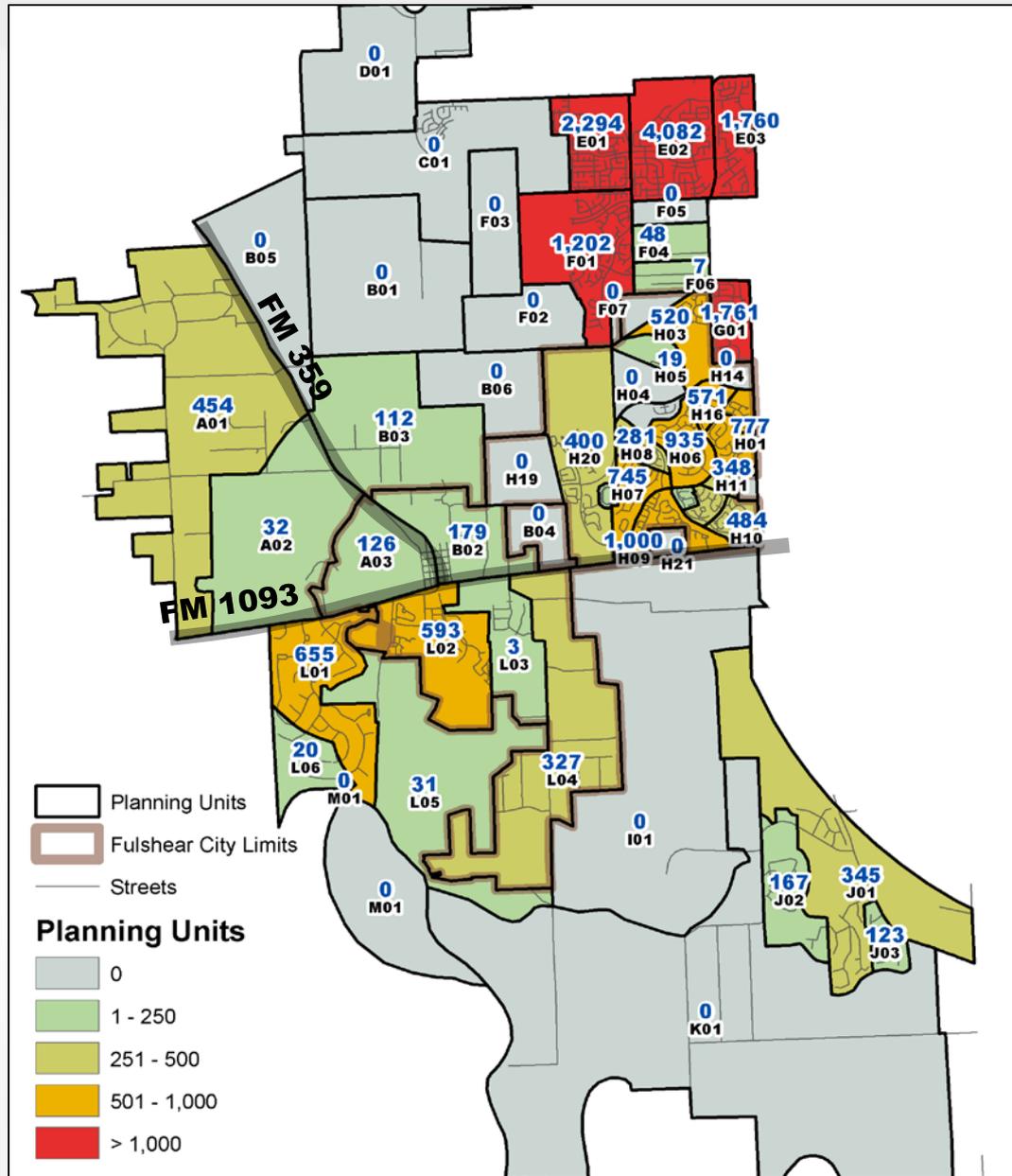
Community		2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
CITY LIMITS	Cross Creek Ranch	8,002	9,473	11,388	13,208	14,651	15,936	16,822	17,536	18,256	18,881
	Downtown Area (A03, B02)	305	305	318	354	457	596	789	1,053	1,434	1,866
	Fulbrook on Fulshear Creek	765	965	1,193	1,417	1,653	1,904	2,170	2,437	2,673	2,840
	Fulshear Run	39	104	264	421	587	671	742	764	801	805
ETJ	Churchill Farms	1,782	1,800	1,818	1,836	1,854	1,873	1,892	1,911	1,930	1,949
	Firethorne	8,699	9,162	9,642	10,070	10,432	10,632	10,783	10,932	11,089	11,254
	Foster Farms	0	0	16	142	380	892	1,618	2,471	3,483	4,620
	Fulbrook	686	708	730	751	777	803	829	860	890	920
	Fulshear Farms	0	0	84	262	625	1,199	1,935	2,874	3,923	4,989
	Fulshear Lakes	0	104	311	629	1,058	1,593	2,156	2,824	3,519	4,208
	Harrison Interests Tract	0	0	0	90	381	833	1,522	2,336	3,339	4,349
	Jordan Ranch	240	699	1,372	2,127	2,933	3,834	4,794	5,895	6,994	8,093
	Tamarron	1,914	2,706	3,708	4,793	5,887	7,120	8,466	9,774	11,000	12,051

Projected Population by Jurisdiction

Area	Oct. 2016	Oct. 2018	Oct. 2020	Oct. 2022	Oct. 2024	Oct. 2026
City	8,521	11,174	15,758	19,526	22,325	25,060
ETJ	12,274	15,675	21,138	29,342	41,061	54,813
City + ETJ	20,795	26,849	36,896	48,868	63,386	79,873
Outside ETJ	819	897	1,323	2,441	4,136	6,060
SINGLE MEMBER DISTRICTS						
District 1	1,628	2,794	5,228	7,835	10,411	12,963
District 2	2,095	2,321	2,958	3,458	3,490	3,518
District 3	1,641	2,751	4,140	4,686	4,757	4,789
District 4	1,633	1,693	1,756	1,822	1,890	1,960
District 5	1,524	1,615	1,676	1,725	1,777	1,830

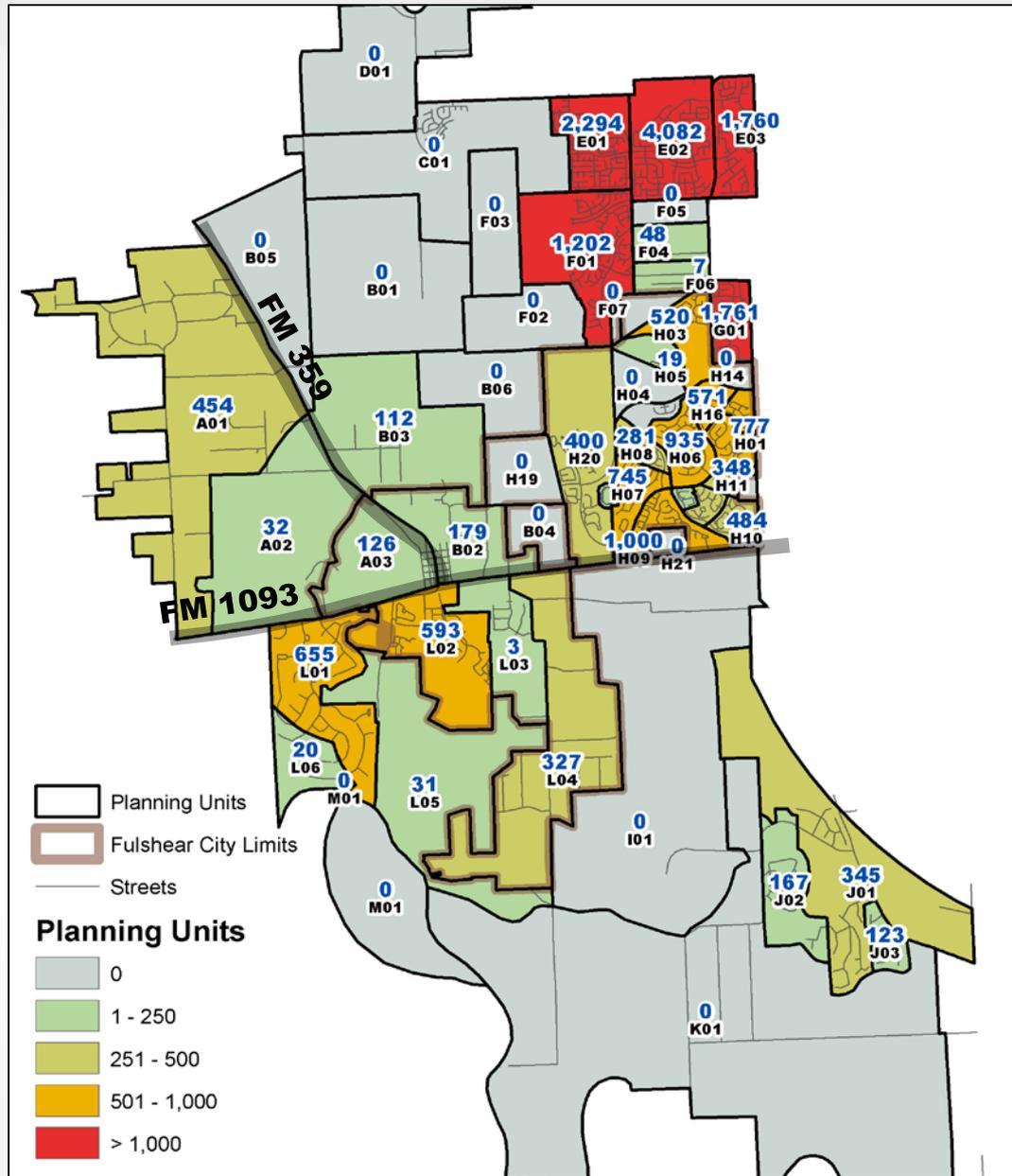
Estimated Population by Planning Unit

Oct. 2016



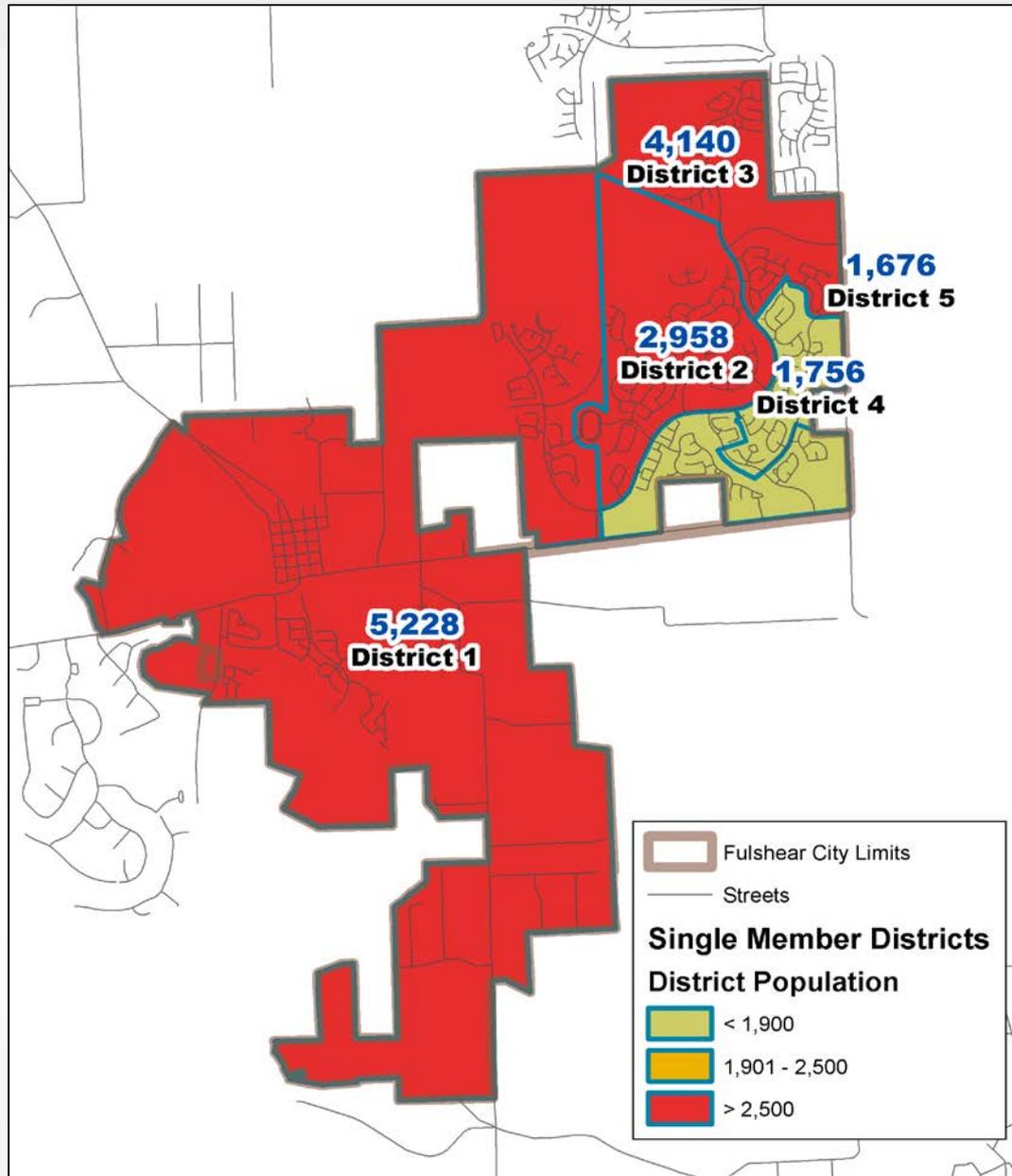
Projected Population by Planning Unit

Oct. 2021



Projected Population by Single Member District

Oct. 2020



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