



2011 ANNUAL REPORT



GROWTH AND DEVELOPMENT TRENDS IN THE CITY OF PALM COAST

COMMUNITY DEVELOPMENT DEPARTMENT

2011 ANNUAL REPORT



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SECTION 1: OVERVIEW

INTRODUCTION

The Community Development Department has prepared this annual report in order to summarize growth and development trends occurring in the City, and also better project growth in the future. In addition, this annual report is provided to both public and private agencies in order to better coordinate future growth with infrastructure needs and services.

The majority of data displayed in this report is orientated to traffic analysis zones, or TAZs, which are the smallest geographic units that the City related growth data and are utilized in the City's transportation modeling efforts. Building permits, Certificates of Occupancy, and development approvals are tracked and referenced to TAZs by the Community Development Department. Each TAZ is numbered on the maps and throughout the report will be referenced for the reader's benefit and use.

GENERAL DEMOGRAPHICS

A comparison of the 2000 and 2010 demographics from the decennial U.S. Census is provided below. Household income and poverty data are from the 5-year (2005-2009) American Community Survey. The data shows that between 2000 and 2010, the percentage of total population under 18 years of age in the City increased while the percentage of total population over 65 years decreased. This is also reflected in the decrease in median age from 51.2 years to 45.1. Although the City is getting younger, it is important to note that the City overall tends to be older than the national average in terms of median age and population 65 years and older.

FIGURE 1.1 — GENERAL DEMOGRAPHICS TABLE

	CITY OF PALM COAST 2000 Bicentennial Census Estimate	CITY OF PALM COAST 2010 U.S. Census & 5-Year American Community Survey	NATIONAL 2010 U.S. Census & 5-Year American Community Survey
% OF POPULATION UNDER 18 YEARS	18.5 %	21.4 %	24.0 %
% OF POPULATION 65 YEARS AND OVER	30.2 %	23.0 %	13.0 %
MEDIAN AGE	51.2	45.1	37.2
AVERAGE HOUSEHOLD SIZE	2.38	2.51	2.58
MEDIAN HOUSEHOLD INCOME	\$ 41,570	\$ 48,672	\$ 51,425
PER CAPITA INCOME	\$ 21, 490	\$ 24,226	\$ 27,041
FAMILIES BELOW POVERTY LEVEL	5.6 %	8.0 %	9.9 %
HOUSEHOLD UNITS	14,929	29,805	-
% OF OWNER OCCUPIED HOUSEHOLDS	85.9 %	75.8 %	65.1 %



POPULATION ESTIMATES / PROJECTIONS

The U.S. Census Bureau provides population estimates of the City’s population every July 1st. Based on these estimates, the City’s population grew by about 24% between 2005 (60,952) to 2011 (75,617).

FIGURE 1.2 – U.S. CENSUS BUREAU POPULATION ESTIMATES AND GROWTH RATES TABLE

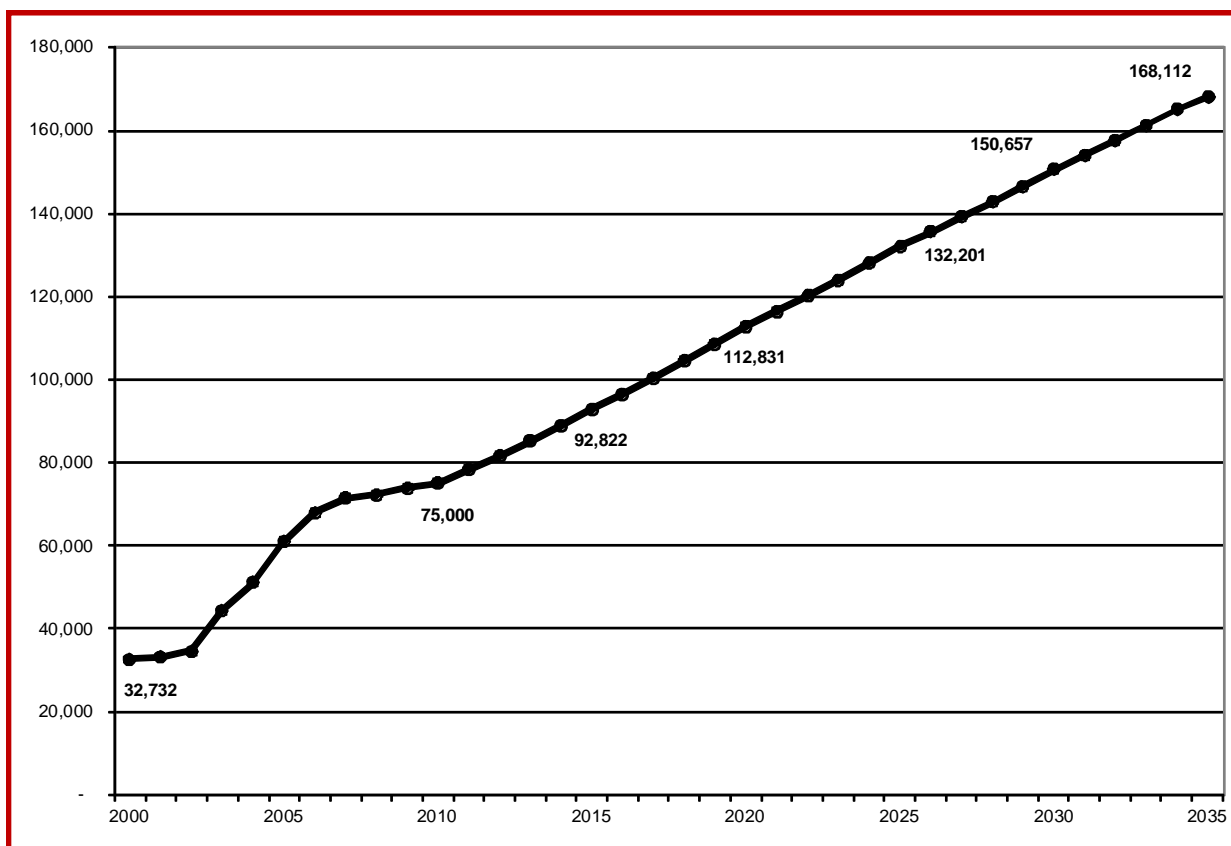
	2005	2006	2007	2008	2009	2010	2011
Population	60,952	68,047	71,383	72,316	73,910	75,180	75,617
Growth Rate	19.00%	11.60%	4.90%	1.30%	2.20%	1.70%	0.60%

Based on the BEBR population projections for Flagler County (Medium Projection), the City can generate population projections as a share of the County projections. The population projection indicates that by 2035, the City’s population will more than double to 168,112.

FIGURE 1.3 – BEBR POPULATION PROJECTIONS TABLE

	2015	2020	2025	2030	2035
COUNTY POPULATION PROJECTION	115,600	137,500	158,700	178,900	198,000
CITY POPULATION PROJECTION	92,822	112,831	132,201	150,657	168,112
CITY GROWTH RATE	4.4 %	4.0 %	3.2 %	2.6 %	2.3 %

FIGURE 1.4 – POPULATION ESTIMATES/PROJECTIONS CHART



SECTION 2: RESIDENTIAL DEVELOPMENT

CONSTRUCTION COMPLETED

The Building Division of the Community Development Department issues and tracks Certificates of Occupancy, or “COs” for residential construction projects. COs indicate that a residential construction project has been completed and is ready for occupancy.

During the past year a total of 103 dwelling units were issued a CO, which was about a 67% decrease from 2010. There were no COs for housing types other than single-family detached dwelling units.

FIGURE 2.1 – RESIDENTIAL CONSTRUCTION COMPLETED TABLE (2007–2011)

	2007	2008	2009	2010	2011
Single-Family Detached Dwelling Units	580	225	163	110	103
Single-Family Attached Dwelling Units	45	28	12	2	0
Townhome/Condominium Dwelling Units	208	0	0	7	0
Multi-Family Dwelling Units	0	20	428	190	0
Total Dwelling Units	833	273	603	309	103

FIGURE 2.2 – RESIDENTIAL CONSTRUCTION COMPLETED CHART (2007–2011)

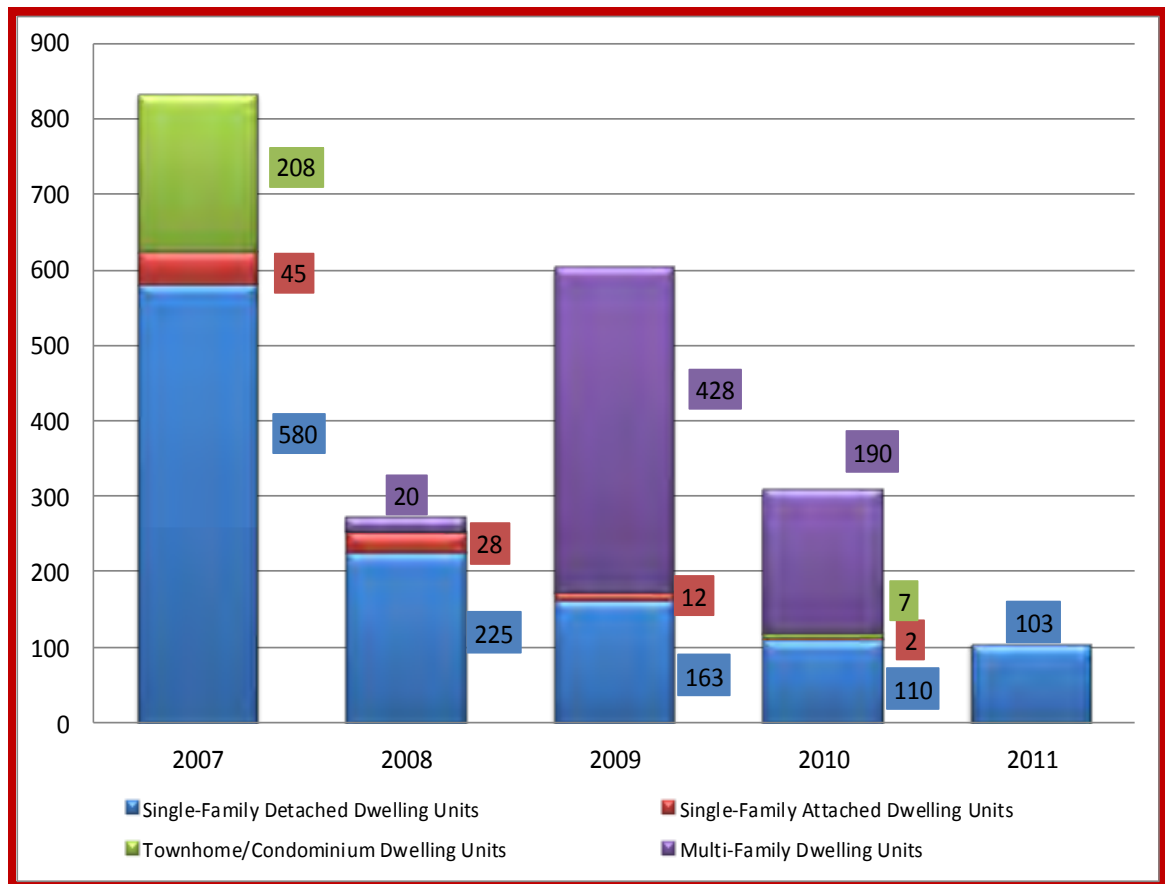
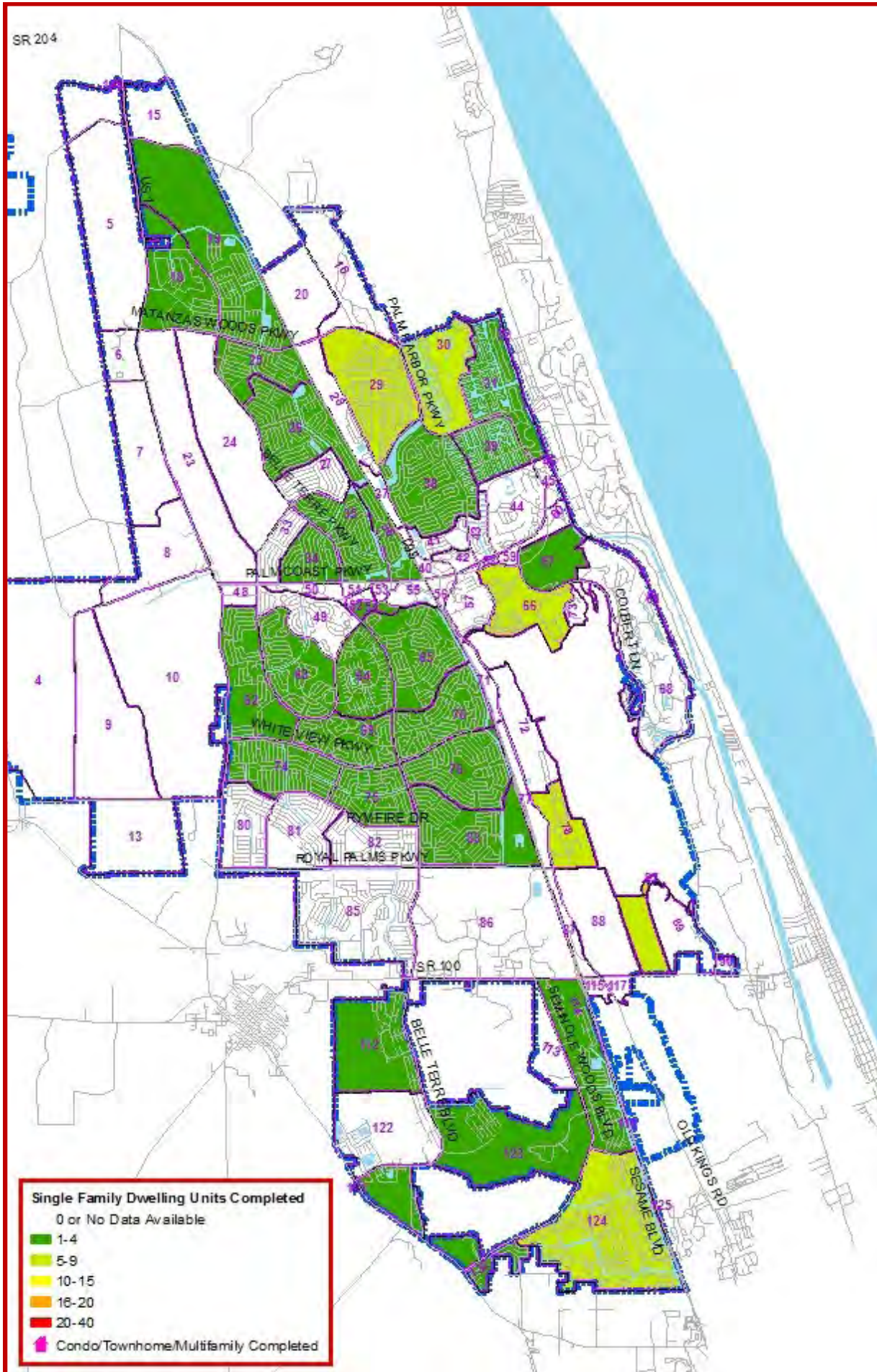


FIGURE 2.3 – RESIDENTIAL CONSTRUCTION COMPLETED MAP (2011)



SECTION 2

BUILDING PERMITS ISSUED

The Building Division of the Community Development Department issues and tracks building permits for residential construction projects. Building permits indicate that a residential construction project is under construction and may be completed in the near future (0-3 years).

During the past year a total of 79 single-family detached dwelling units were issued a building permit, there were no other new residential units issued. Overall, the permits issued is a decrease of 64% from 2010.

FIGURE 2.4 – RESIDENTIAL BUILDING PERMITS ISSUED TABLE (2007–2011)

	2007	2008	2009	2010	2011
Single-Family Detached Dwelling Units	408	158	125	114	79
Single-Family Attached Dwelling Units	36	14	0	0	0
Townhome/Condominium Dwelling Units	0	7	0	0	0
Multi-Family Dwelling Units	138	310	0	106	0
Total Dwelling Units	582	489	125	220	79

FIGURE 2.5 – RESIDENTIAL BUILDING PERMITS ISSUED TABLE (2007–2011)

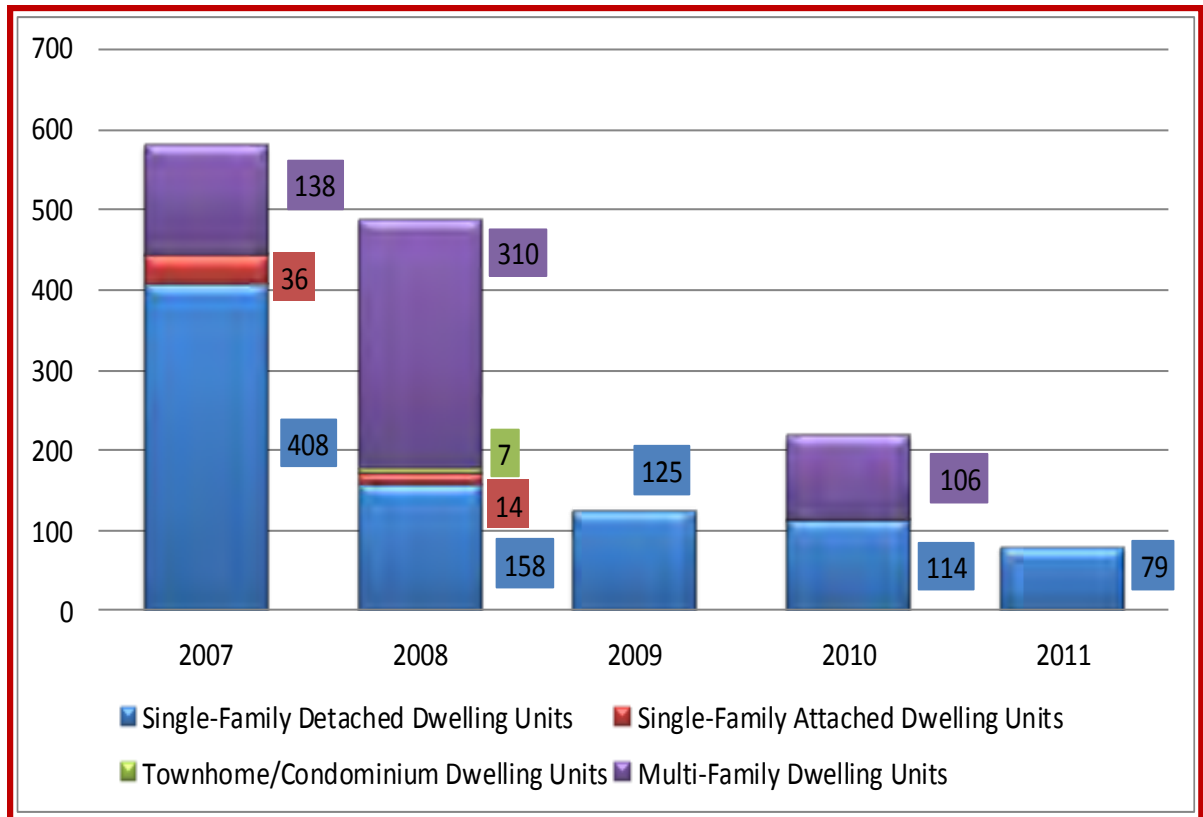
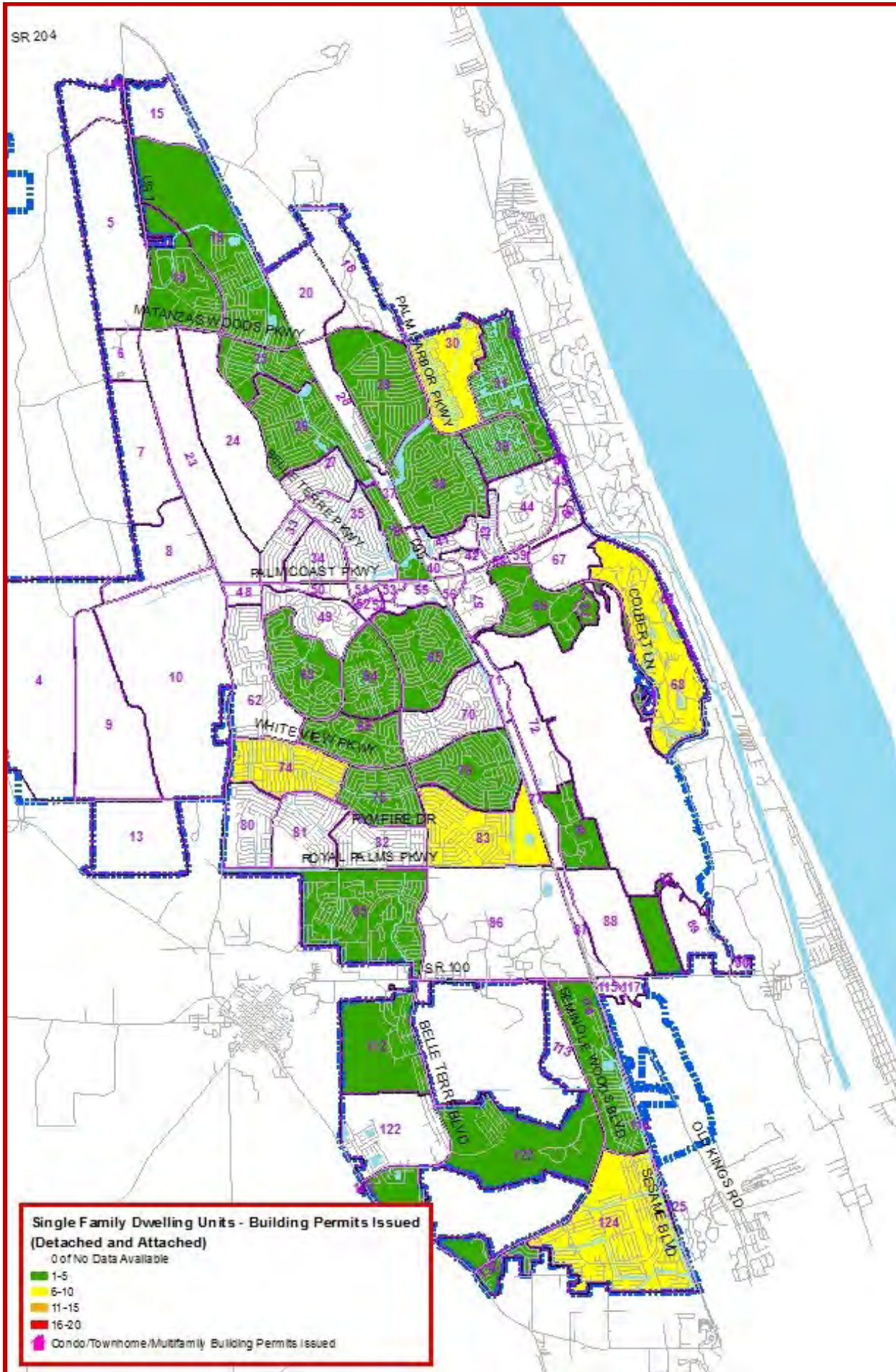


FIGURE 2.6 – RESIDENTIAL BUILDING PERMITS ISSUED MAP (2011)



SECTION 2

DEVELOPMENT APPROVED

The Planning Division of the Community Development Department issues development orders for residential projects. Development orders allow an applicant to apply for a building permit to construct the residential project and may predict future growth in the short term (1–5 Years), depending on a variety of factors.

In 2011, there were no residential developments approved.

SECTION 2

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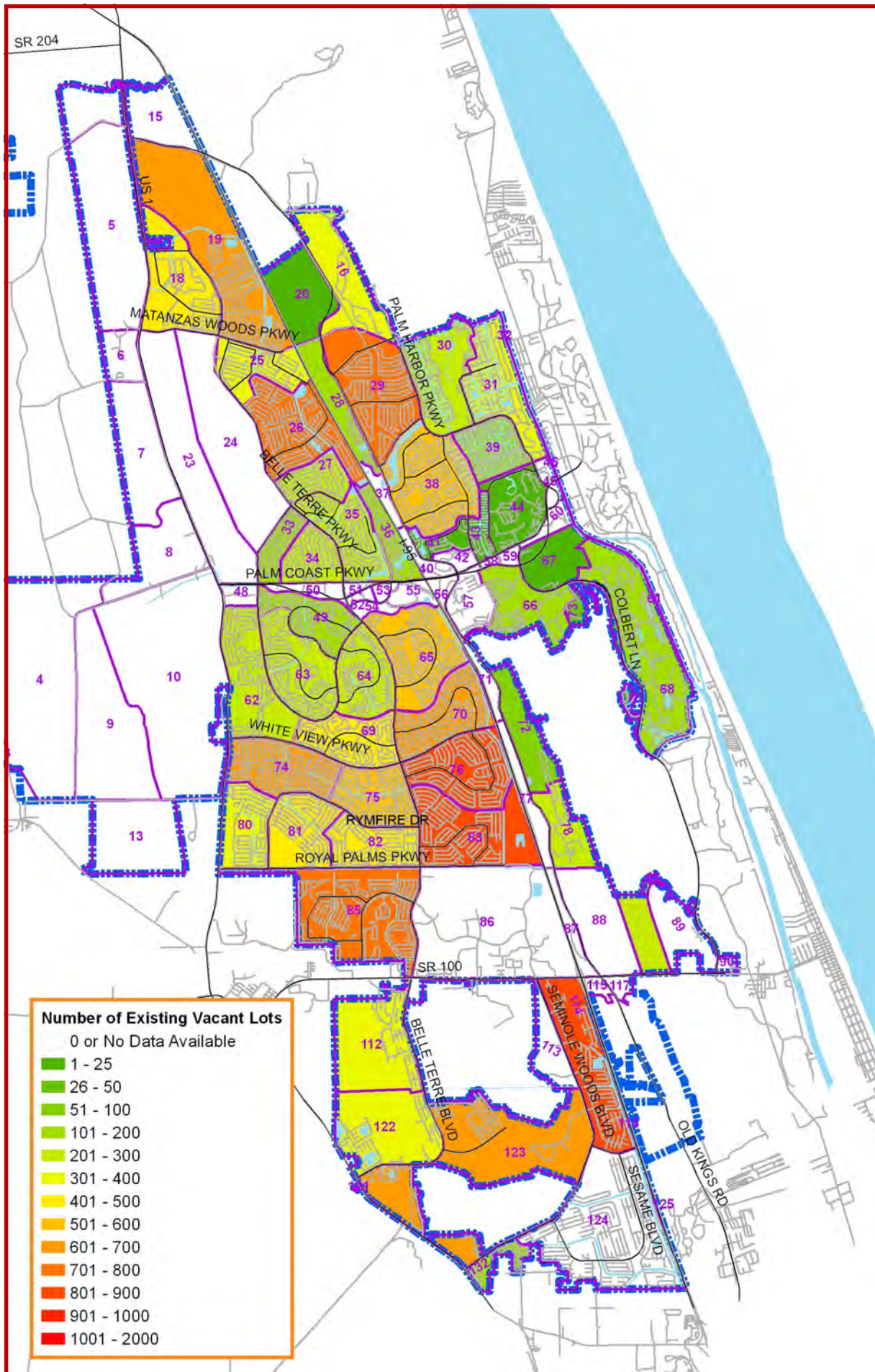
EXISTING VACANT LOTS

The City maintains a database of existing vacant lots for use by its various departments. At the end of 2011, the City contained approximately 18,076 vacant lots, slightly down from 18,179 in 2009. The number of existing vacant lots represents future potential growth in the City over an extended period, possibly up to 20 years.

FIGURE 2.9 – EXISTING VACANT RESIDENTIAL LOTS BY TAZ TABLE (2011)

TAZ	TOTAL LOTS	OCCUPIED LOTS	VACANT LOTS	PERCENTAGE VACANT
16	346	11	335	96.8 %
18	1,097	635	462	42.3 %
19	1,415	745	670	47.6 %
20	22	1	21	95.5 %
25	865	521	344	40.7 %
26	2,043	1,307	736	36.3 %
27	778	552	226	29.3 %
28	241	110	131	54.4 %
29	1,885	1,115	770	41.5 %
30	1,037	783	254	25.2 %
31	1,102	775	327	30.3 %
33	604	438	166	27.7 %
34	805	595	204	25.7 %
35	1,308	1,039	269	20.7 %
36	470	295	175	37.9 %
38	2,352	1,843	509	21.9 %
39	916	777	149	15.4 %
41	285	280	5	1.8 %
43	232	209	23	9.9 %
44	374	371	3	0.8 %
49	859	693	166	19.3 %
57	220	220	0	0.0 %
62	1,189	897	292	24.9 %
63	1,501	1,274	227	15.3 %
64	1,184	947	237	20.4 %
65	1,709	1,148	561	33.2 %
66	583	467	116	21.4 %
67	32	27	5	18.8 %
68	1,443	1,276	167	12.8 %
69	1,298	821	477	37.3 %
70	1,554	950	604	38.9 %
72	75	0	75	100.0 %
73	186	138	48	26.3 %
74	1,715	1,089	626	37.1 %
75	1,453	898	555	38.7 %
76	1,902	1,074	828	43.8 %
78	260	30	229	88.1 %
80	894	528	366	40.9 %
81	1,125	681	444	39.8 %
82	1,245	767	478	38.6 %
83	1,761	937	824	47.2 %
85	2,153	1,397	756	35.1 %
112	732	419	313	43.0 %
114	1,309	486	823	63.4 %
122	742	395	347	46.8 %
123	1,013	415	598	59.9 %
124	3,174	1,184	1,990	63.1 %
132	323	167	156	49.0 %
TOTAL	49,811	31,735	18,076	36.3 %

FIGURE 2.10 – EXISTING VACANT RESIDENTIAL LOTS MAP (2011)



SECTION 3: NON-RESIDENTIAL DEVELOPMENT

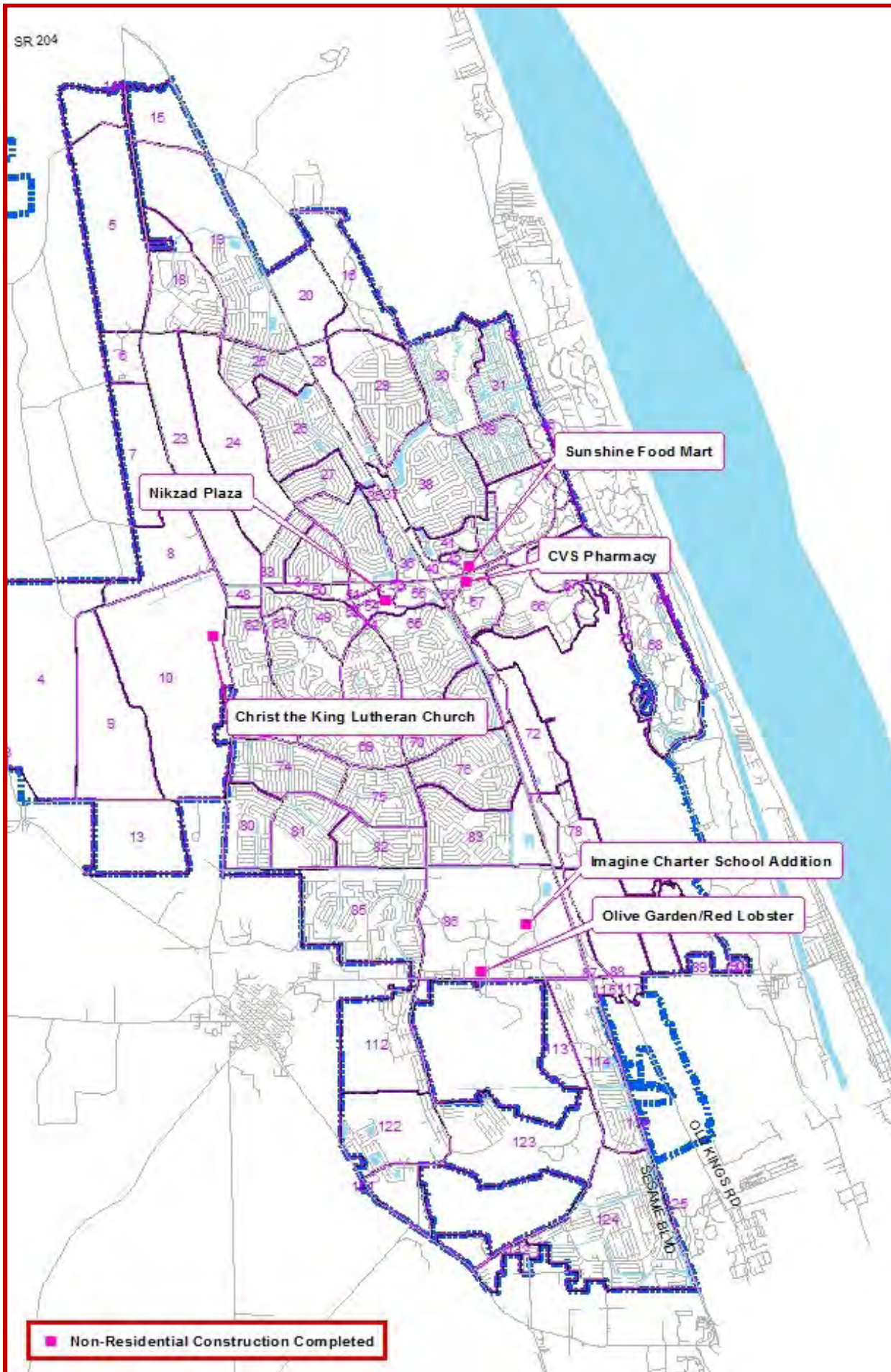
CONSTRUCTION COMPLETED

The Building Division of the Community Development Department issues and tracks Certificates of Occupancy, or “COs” for non-residential construction projects. COs indicate that a non-residential construction project has been completed and is ready for occupancy. During the past year, COs were issued for projects that included a total of 66,180 square feet of non-residential space, down from last year (129,970 square feet in 2010).

FIGURE 3.1 – NON-RESIDENTIAL CONSTRUCTION COMPLETED TABLE (2011)

	TAZ	DESCRIPTION
CHRIST THE KING LUTHERAN CHURCH (US 1)	10	3,456 square feet classroom addition
CVS PHARMACY (OLD KINGS ROAD)	57	14,862 square foot pharmacy with drive-thru
IMAGINE CHARTER SCHOOL ADDITION (TOWN CENTER)	86	21,409 square foot school addition
NIKZAD PLAZA (CYPRESS POINT PARKWAY)	53	11,831 square foot retail
OLIVE GARDEN/RED LOBSTER RESTAURANT (TOWN CENTER)	86	10,872 square foot restaurant
SUNSHINE FOOD MART (PALM COAST PARKWAY)	42	3,750 square foot gas station
SUMMARY OF NON-RESIDENTIAL CONSTRUCTION COMPLETED IN 2011		66,180 Square Feet of Non-Residential

FIGURE 3.2 — NON-RESIDENTIAL CONSTRUCTION COMPLETED (2011)



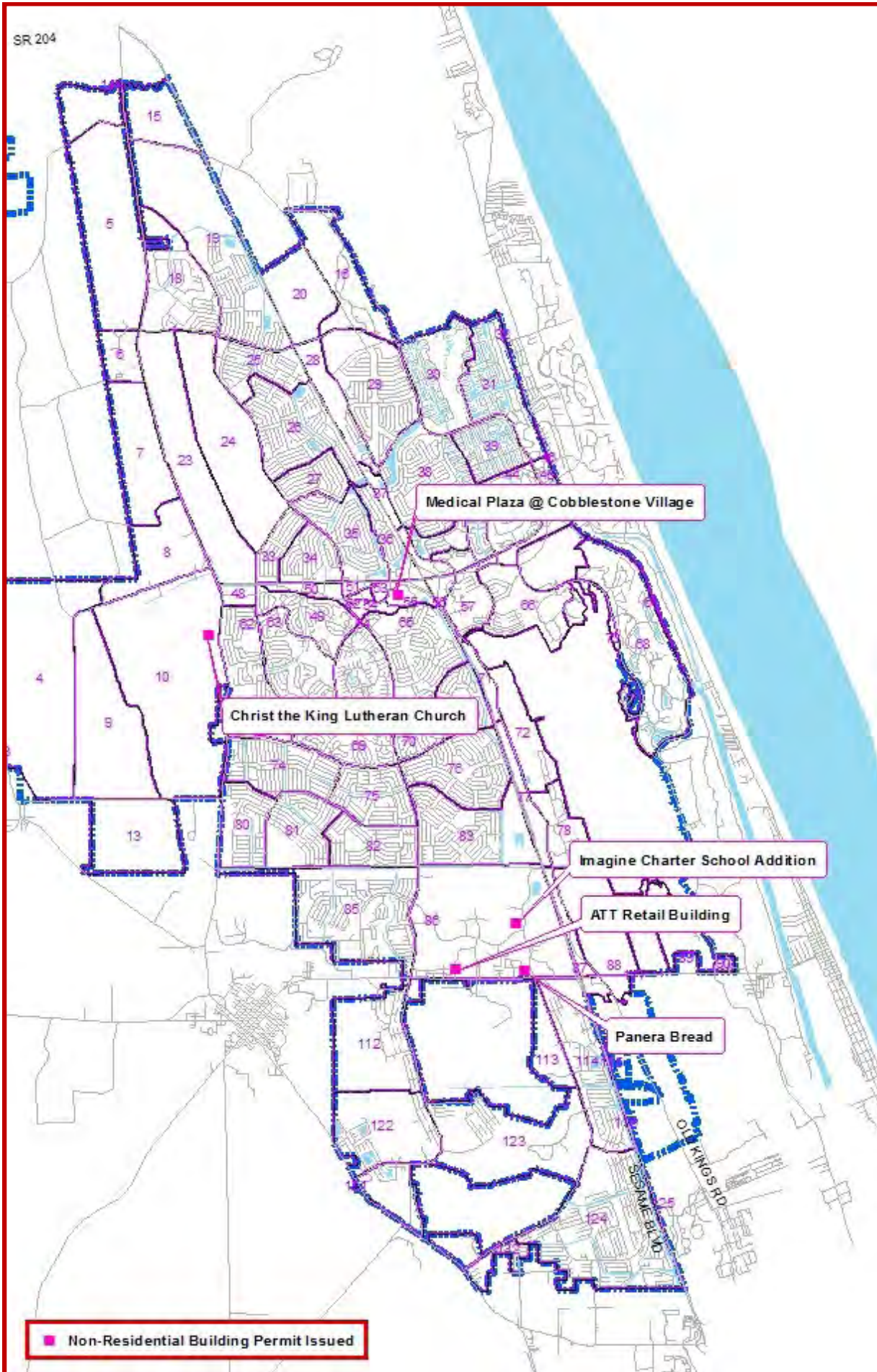
BUILDING PERMITS ISSUED

The Building Division of the Community Development Department issues and tracks building permits for non-residential construction projects. Building permits indicate that a non-residential construction project is under construction and may be completed in the near future (0-3 years). During the past year, building permits were issued for projects that included a total of 67,476 square feet of non-residential space. Most notably, building permits were issued for a 34,000 square foot medical office building, and a 21,409 sq. ft. school addition.

FIGURE 3.3 – NON-RESIDENTIAL BUILDING PERMITS ISSUED TABLE (2011)

	TAZ	DESCRIPTION
ATT RETAIL BUILDING (TOWN CENTER)	86	4,500 square foot retail
CHRIST THE KING LUTHERAN CHURCH (US-1)	10	3,456 square foot school addition
IMAGINE CHARTER SCHOOL (TOWN CENTER)	86	21,409 square foot school addition
MEDICAL PLAZA @ COBBLESTONE VILLAGE (CYPRESS EDGE PARKWAY)	55	34,000 square foot medical office building
PANERA BREAD (TOWN CENTER)	86	4,111 square foot restaurant & drive-thru
SUMMARY OF NON-RESIDENTIAL BUILDING PERMITS ISSUED IN 2011		67,476 Square Feet of Non-Residential

FIGURE 3.4 – NON-RESIDENTIAL BUILDING PERMITS ISSUED MAP (2011)



SECTION 3

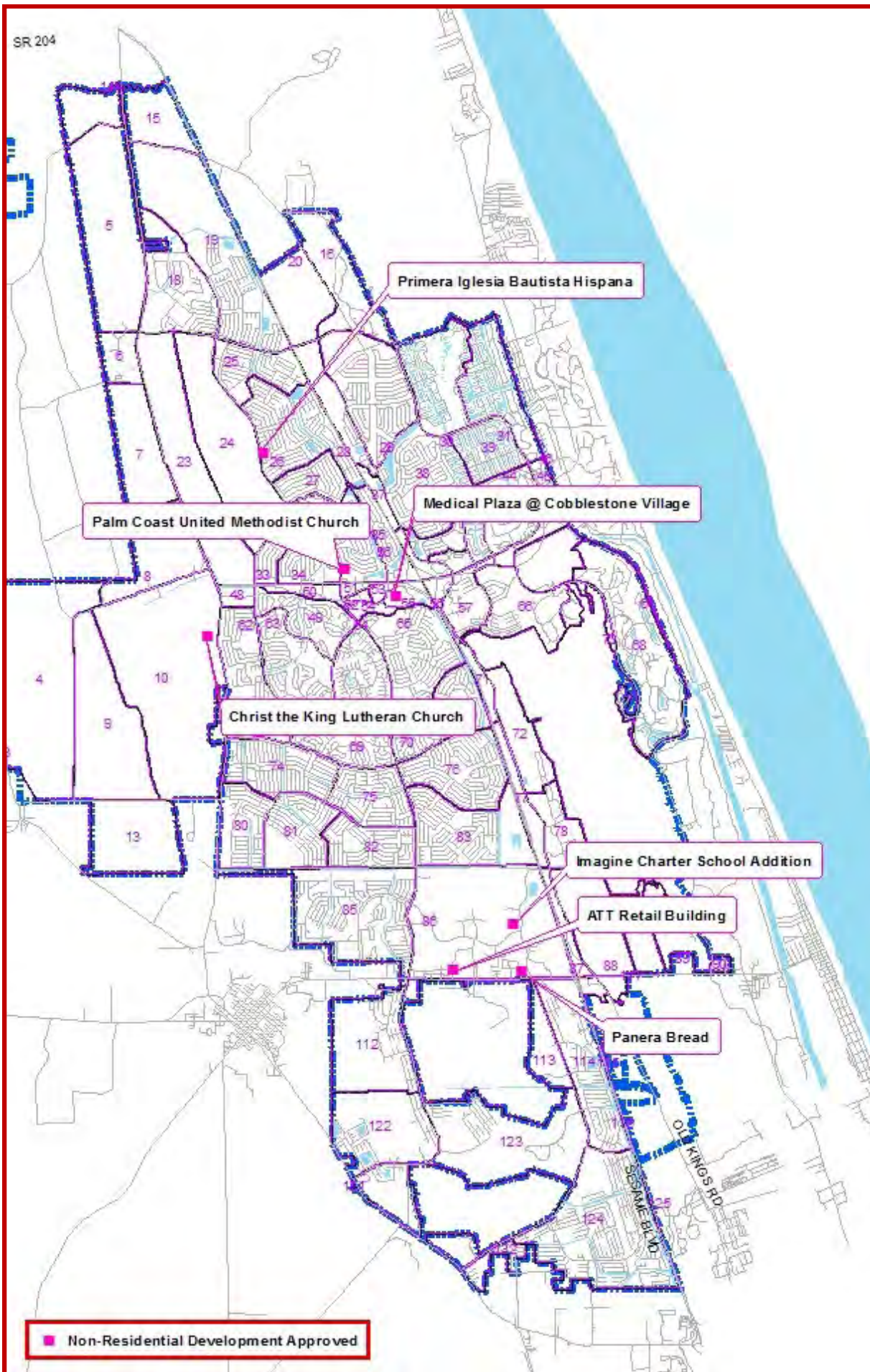
DEVELOPMENT APPROVED

The Planning Division of the Community Development Department issues development orders for non-residential projects. Development orders for non-residential projects allow an applicant to apply for a building permit to construct the residential project and may predict future growth in the short term (1–5 years), depending on a variety of factors. In 2011, development orders approved included square feet of non-residential uses.

FIGURE 3.5 — NON-RESIDENTIAL DEVELOPMENT APPROVED TABLE (2011)

	TAZ	DESCRIPTION
ATT RETAIL BUILDING (TOWN CENTER)	86	4,500 square foot retail
CHRIST THE KING LUTHERAN CHURCH (US1)	10	3,456 square foot school addition
IMAGINE CHARTER SCHOOL (TOWN CENTER)	86	21,409 school addition
MEDICAL PLAZA @ COBBLESTONE VILLAGE (CYPRESS EDGE PARKWAY)	55	34,000 square foot medical office building
PALM COAST UNITED METHODIST CHURCH (BELLE TERRE PARKWAY)	35	1,730 square foot addition
PANERA BREAD (TOWN CENTER)	86	4,111 square foot restaurant & drive-thru
PRIMERA IGLESIA BAUTISTA HISPANA (BELLE TERRE PARKWAY)	55	3,209 square foot addition
SUMMARY OF NON-RESIDENTIAL DEVELOPMENT APPROVED IN 2011		72,415 Square Feet of Non-Residential

FIGURE 3.6 — NON-RESIDENTIAL DEVELOPMENT APPROVED MAP (2011)

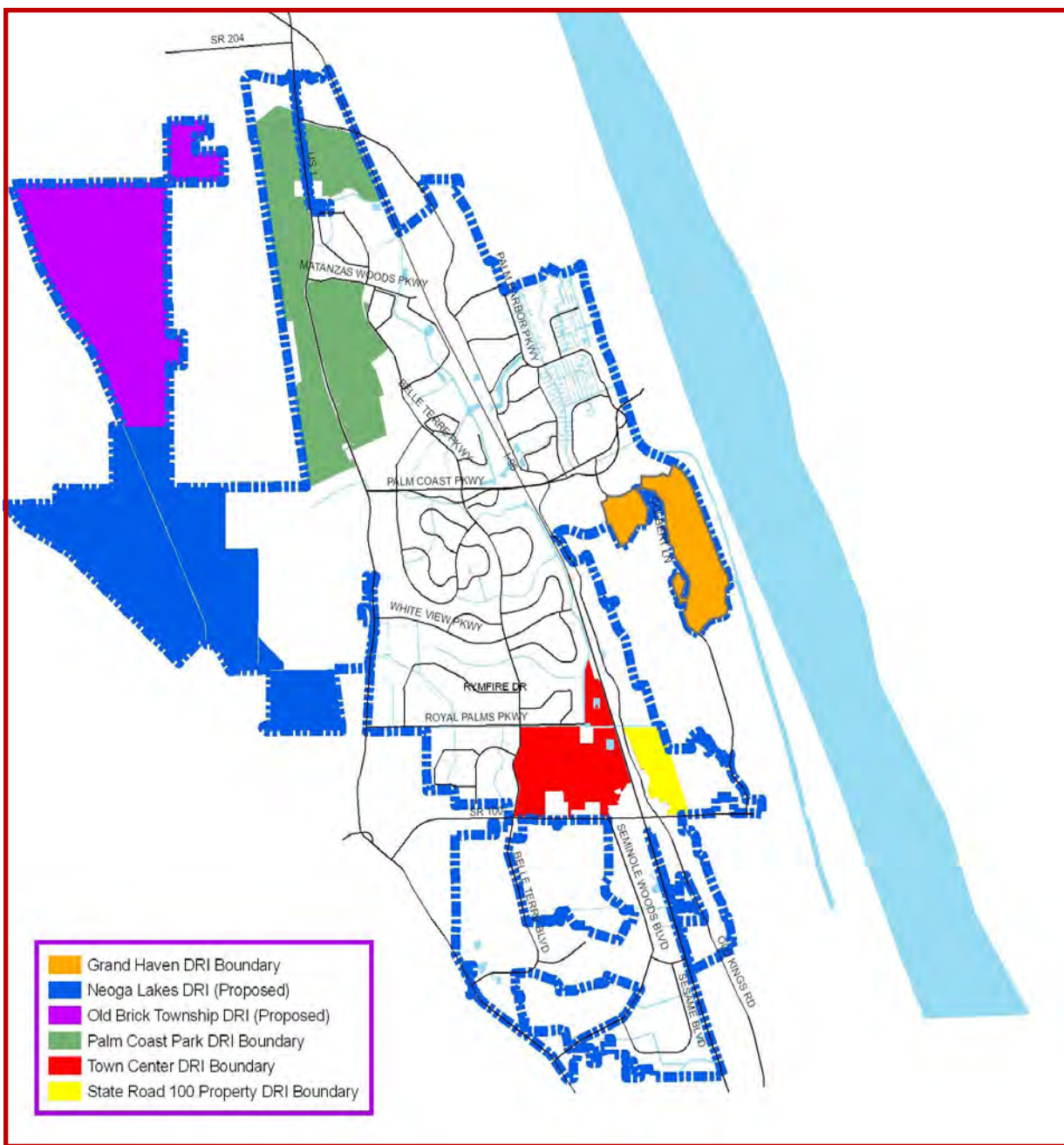


SECTION 3

SECTION 4: STATUS OF MAJOR DEVELOPMENTS

Six (6) major developments, or Developments of Regional Impact (DRI), are approved within the City and will contribute to the overall growth of the City over the long term (up to 25 years). The Grand Haven DRI is substantially complete, with the exception of the remaining non-residential component. The other five (5) major approved developments could contribute 20,511 dwelling units and 10,626,000 square feet of non-residential space over the next 25 years. A location map of these major developments is below and the pages following provide a detailed status of the approved major developments.

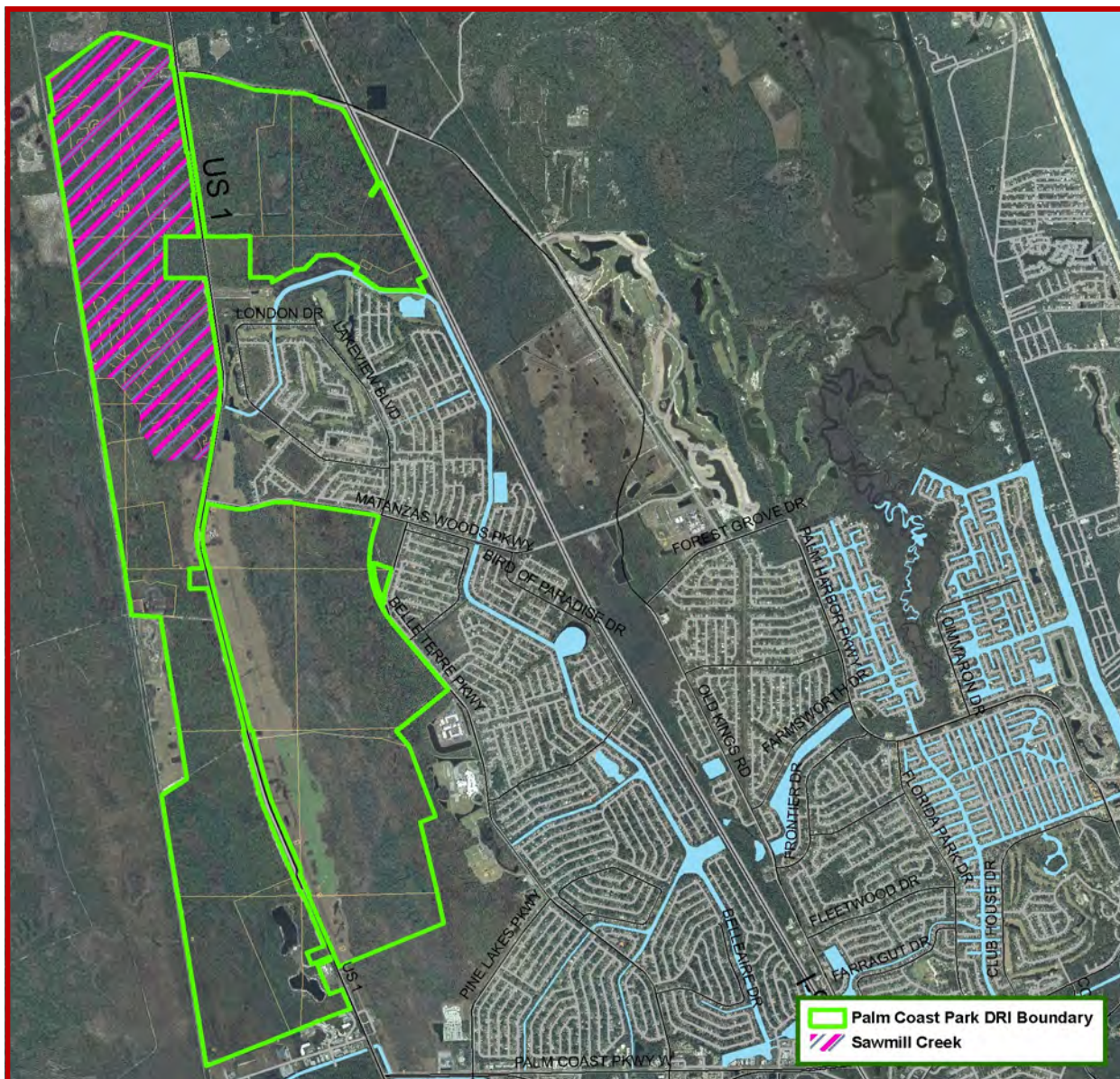
FIGURE 4.1 – MAJOR DEVELOPMENT LOCATION MAP



PALM COAST PARK DRI

The Palm Coast Park DRI was approved on December 7, 2004 and the development plan includes 3,600 dwelling units and 2,480,000 square feet of non-residential space over three phases over 16 years through 2020.

FIGURE 4.2 – PALM COAST PARK DRI MAP AND TABLE

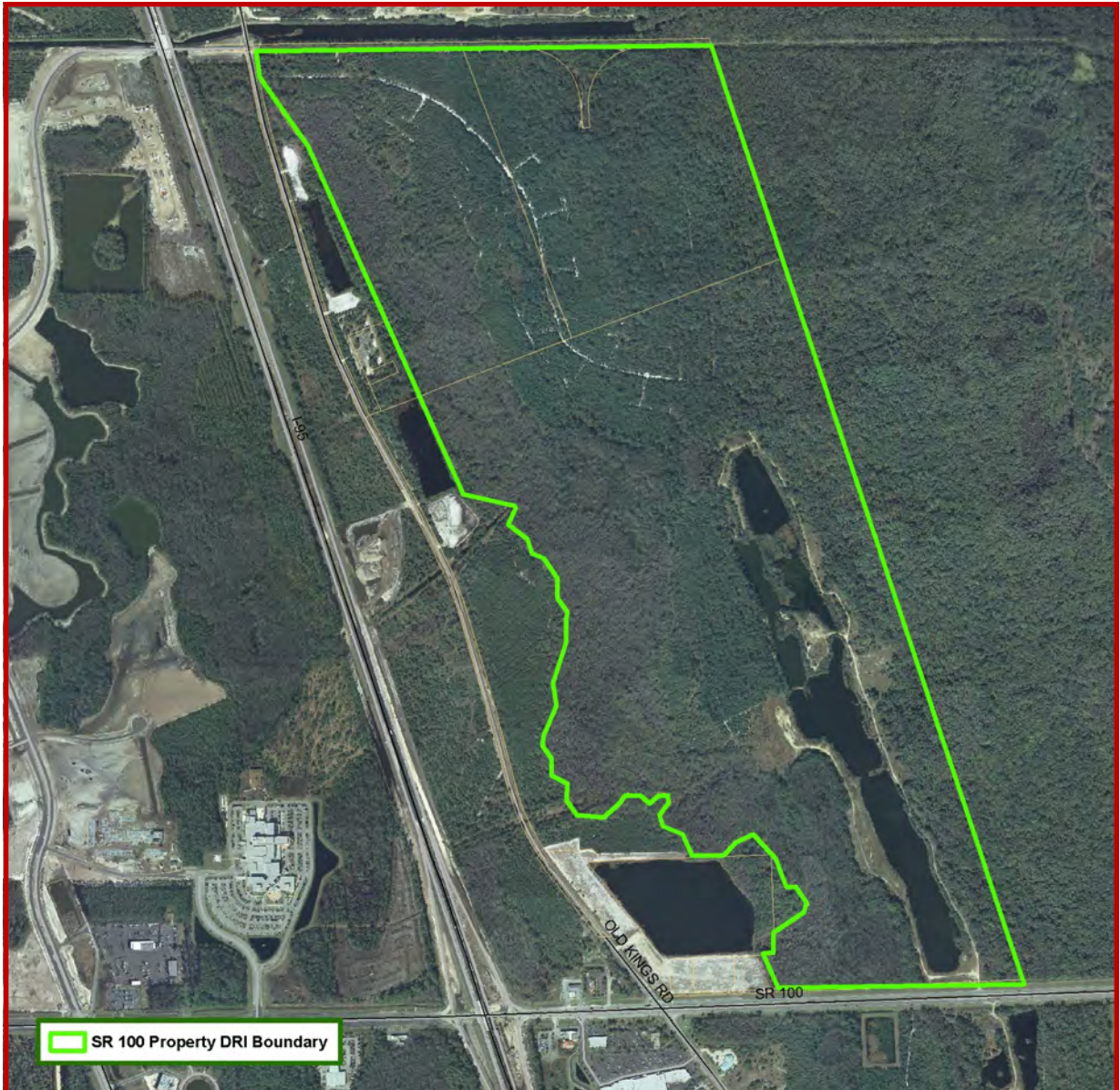


	ENTITLEMENT	DEVELOPMENT APPROVAL	BUILDING PERMITS ISSUED	CONSTRUCTION COMPLETED
RESIDENTIAL	3,600 du	-	-	-
OFFICE	800,000 sf	-	-	-
RETAIL COMMERCIAL	1,500,000 sf	-	-	-
INDUSTRIAL	80,000 sf	-	-	-
INSTITUTIONAL	100,000 sf	-	-	-

STATE ROAD 100 PROPERTY DRI

The State Road 100 Property DRI was approved on September 15, 2006 and the development plan includes 2,411 dwelling units, 80,000 square feet of non-residential space, and 150 hotel rooms over two phases over 9 years through 2015. No major projects have received development approval within the State Road 100 Property DRI through to the end of 2009.

FIGURE 4.3 – STATE ROAD 100 PROPERTY DRI MAP AND TABLE



	DRI ENTITLEMENT	DEVELOPMENT APPROVAL	BUILDING PERMITS ISSUED	CONSTRUCTION COMPLETED
RESIDENTIAL (SF)	773 du	-	-	-
RESIDENTIAL (MF)	1,638 du	-	-	-
GENERAL RETAIL	50,000 sf	-	-	-
GENERAL OFFICE	30,000 sf	-	-	-
HOTEL	150 rooms	-	-	-

TOWN CENTER DRI

The Town Center DRI was approved on July 11, 2003 and the development plan includes 2,500 dwelling units, 4,425,000 square feet of non-residential space, over 3 phases over 17 years through 2020.

FIGURE 4.4 – TOWN CENTER DRI MAP AND TABLE

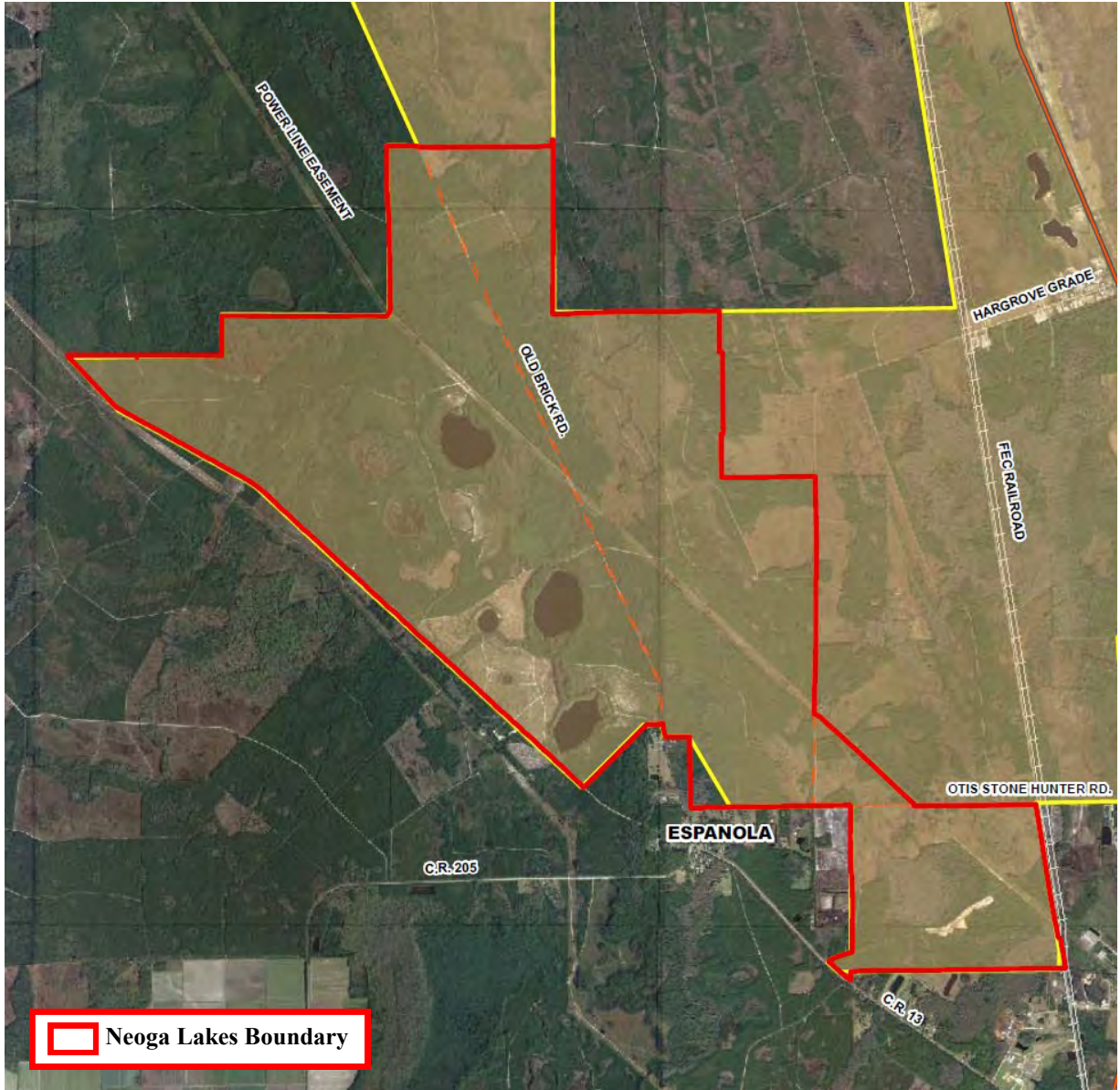


	DRI ENTITLEMENT	DEVELOPMENT APPROVAL	BUILDING PERMITS ISSUED	CONSTRUCTION COMPLETED
RESIDENTIAL	2,500 du	252 du	156 du	156 du
RETAIL/COMM/OFFICE	4,800,000 sf	728,969 sf	689,494 sf	662,400 sf
MOVIE THEATER	2,400 seats	2,224 seats	2,224 seats	2,224 seats
LODGING	480 rooms	201 rooms	121 rooms	121 rooms
NURSING HOME	240 beds	84 beds	84 beds	84 beds

NEOGA LAKES DRI

The Neoga Lakes DRI became effective after the settlement of the Department of Community Affairs' appeal on July 27, 2011. The development plan includes 7,000 dwelling units, 2,491,000 square feet of non-residential space (including sites for a school and a wastewater treatment plant), recreation areas, open space and conservation areas. The project has three phases through November 2030.

FIGURE 4.5 – NEOGA LAKES DRI MAP AND TABLE

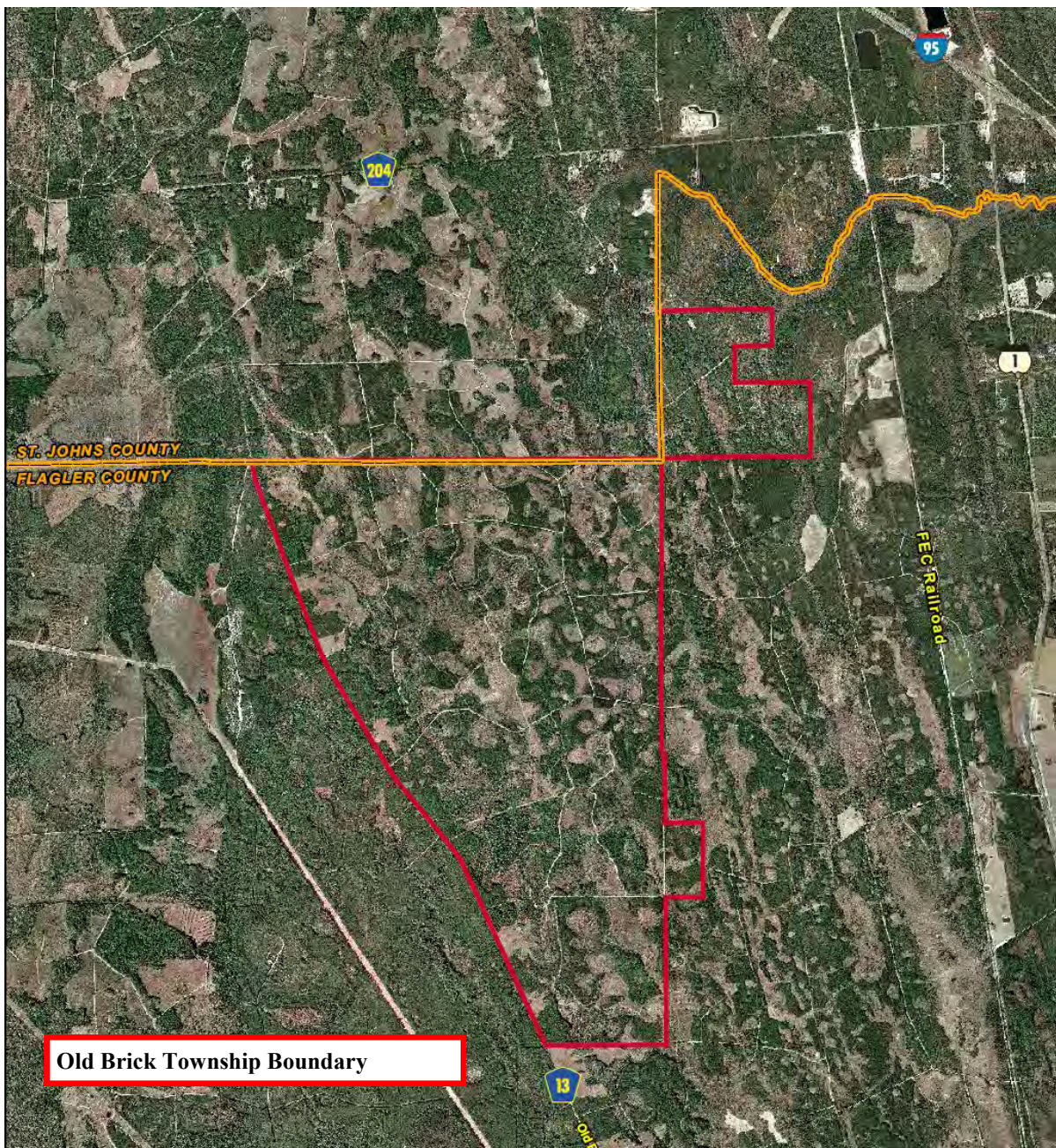


	DRI ENTITLEMENT	DEVELOPMENT APPROVAL	BUILDING PERMITS ISSUED	CONSTRUCTION COMPLETED
RESIDENTIAL	7,000 du	-	-	-
RETAIL USES	354,000 sf	-	-	-
OFFICE USES	45,000 sf	-	-	-
CIVIC USES	222,000 sf	-	-	-
EMPLOYMENT CENTER	1,870,000 sf	-	-	-

OLD BRICK TOWNSHIP DRI

The Old Brick Township DRI became effective after the settlement of the Department of Community Affairs’ appeal on July 27, 2011. The development plan includes 5,000 dwelling units, 1,150,000 square feet of non-residential space, a school site, recreational amenities, and conservation areas. The project has three phases through August 2031.

FIGURE 4.6 – OLD BRICK TOWNSHIP DRI MAP AND TABLE



	DRI ENTITLEMENT	DEVELOPMENT APPROVAL	BUILDING PERMITS ISSUED	CONSTRUCTION COMPLETED
RESIDENTIAL	5,000 du	-	-	-
COMMERCIAL	100,000 sf	-	-	-
OFFICE	50,000 sf	-	-	-
INDUSTRIAL	1,000,000 sf	-	-	-

SECTION 5: ADDITIONAL INFORMATION FOR THE SCHOOL DISTRICT

The *Interlocal Agreement for Public School Facility Planning* requires that the City provide information to the School District annually regarding Future Land Use Map amendments, conversion of residential units, and development approvals with school sites, in addition to the information regarding residential growth already contained in this report.

FUTURE LAND USE MAP AMENDMENTS

There were no Future Land Use Map Amendments in 2011.

CONVERSION OF RESIDENTIAL UNITS

The City did not review any conversions or redevelopment of residential units in 2011.

DEVELOPMENT APPROVALS WITH SCHOOL SITES

PALM COAST PARK DRI SCHOOL SITE

The Palm Coast Park Development of Regional Impact (DRI) includes a 25-acre school site.

JX STATE ROAD 100 DRI SCHOOL SITE

The JX State Road 100 DRI includes a 10-acre pad ready school site co-located with a City park site.

OLD BRICK TOWNSHIP DRI SCHOOL SITE

The Old Brick Township DRI includes up to 40-acre pad ready school site co-located with a City park site. The school site is generally identified as part of the proportionate share mitigation agreement between the developer, the City, and the School District.

NEOGA LAKES DRI SCHOOL SITE

The Neoga Lakes DRI includes a 115-acre school site co-located with a City park site. The school site is generally identified as part of the DRI- Development Order.





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