



2015 ANNUAL REPORT



GROWTH AND DEVELOPMENT TRENDS IN THE CITY OF PALM COAST

COMMUNITY DEVELOPMENT DEPARTMENT

2015 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 demographics from the 5-year American Community Survey (ACS) (2010-2014) is provided below. A comparison between the 2000 Census and the latest 5-year ACS shows that 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 46.5. 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 percentage of population 65 years and older.

FIGURE 1.1 – GENERAL DEMOGRAPHICS TABLE

	City of Palm Coast 2000 Bicentennial Census	City of Palm Coast 5-Year American Community Survey (2010-2014)	National 5-Year American Community Survey (2010-2014)
% of Population Under 18 Years	18.50%	20.4%	23.5%
% of Population 65 Years and over	30.20%	25.5%	13.7%
Median Age	51.2	46.5	37.4
Average Household Size	2.38	2.7	2.63
Median Household Income	\$41,570	\$47,634	\$53,482
Per Capita Income	\$21,490	\$22,335	\$28,555
Families Below Poverty Level	5.60%	11.20%	11.50%
Household Units	14,929	27,446	116,211,092
Tenure of All Occupied Housing Units (Owner Occupied)	85.9%	79.4%	64.4%



POPULATION ESTIMATES / PROJECTIONS

The Bureau of Economic Business Research (BEBR) provides population estimates of the City’s population every April 1st. Based on these estimates, the City’s population grew by about 5.5% between 2011 and 2015.

FIGURE 1.2 – BUREAU OF ECONOMIC BUSINESS RESEARCH POPULATION ESTIMATES AND GROWTH

	2011	2012	2013	2014	2015
Population	75,617	76,450	77,068	78,046	79,821
Growth Rate	0.58%	1.10%	0.81%	1.27%	2.27%

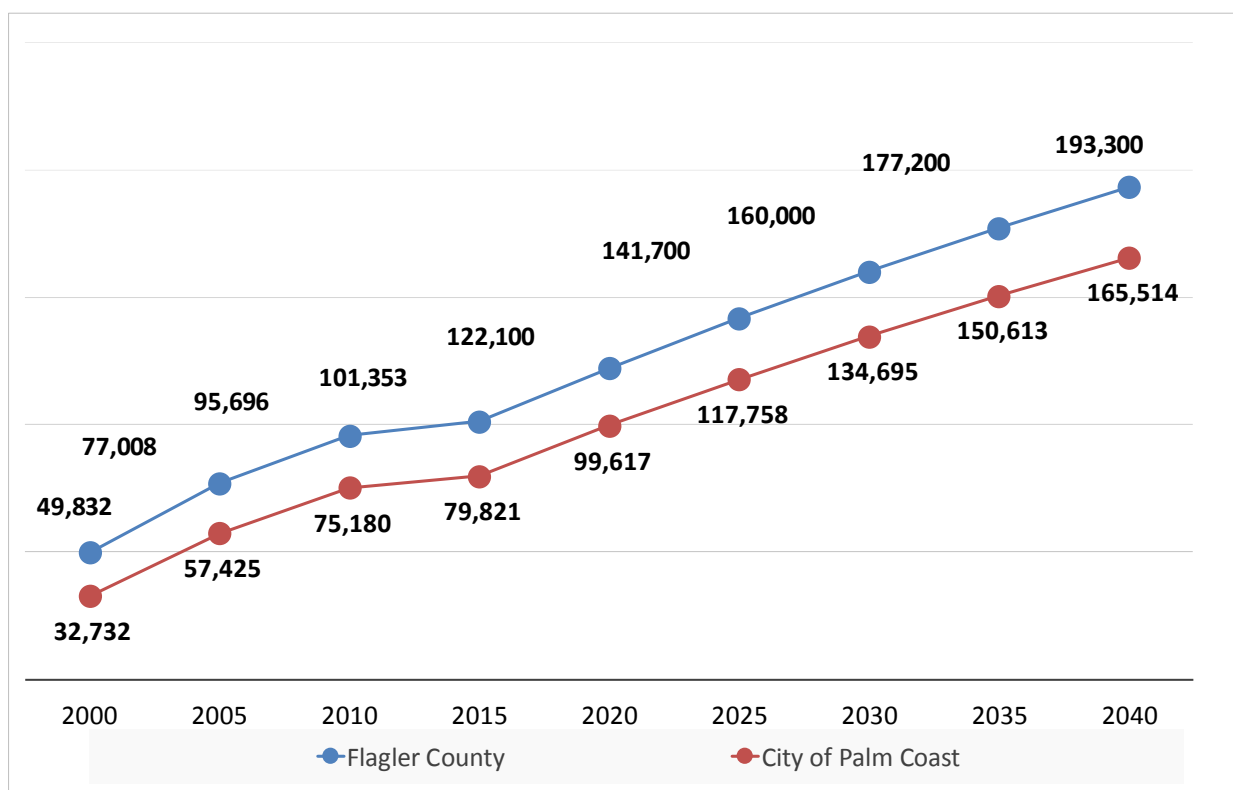
RATES TABLE

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 2040, the City’s population will more than double to 165,514.

FIGURE 1.3 – BEBR POPULATION PROJECTIONS TABLE

	2015	2020	2025	2030	2035	2040
County Population Projection	101,353	122,100	141,700	160,000	177,200	193,300
City Population Projection	79,821	99,617	117,758	134,695	150,613	165,514
City Growth Rate	---	24.80%	18.21%	14.38%	11.81%	9.89%

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 418 dwelling units were issued a CO, which is an amount equivalent to 2014. A variety of housing types were completed in the City, however, single-family detached dwelling units continues to be the predominant housing type being completed in the City (approximately 82.5% of all COs in 2015).

FIGURE 2.1 – RESIDENTIAL CONSTRUCTION COMPLETED TABLE (2011–2015)

	2011	2012	2013	2014	2015
Single-Family Detached Dwelling Units	103	97	193	320	345
Single-Family Attached Dwelling Units (Townhome/Duplex)	0	0	0	2	0
Multi-Family Dwelling Units	0	0	0	96	73
Total Dwelling Units	103	97	193	418	418

FIGURE 2.2 – RESIDENTIAL CONSTRUCTION COMPLETED CHART (2011–2015)

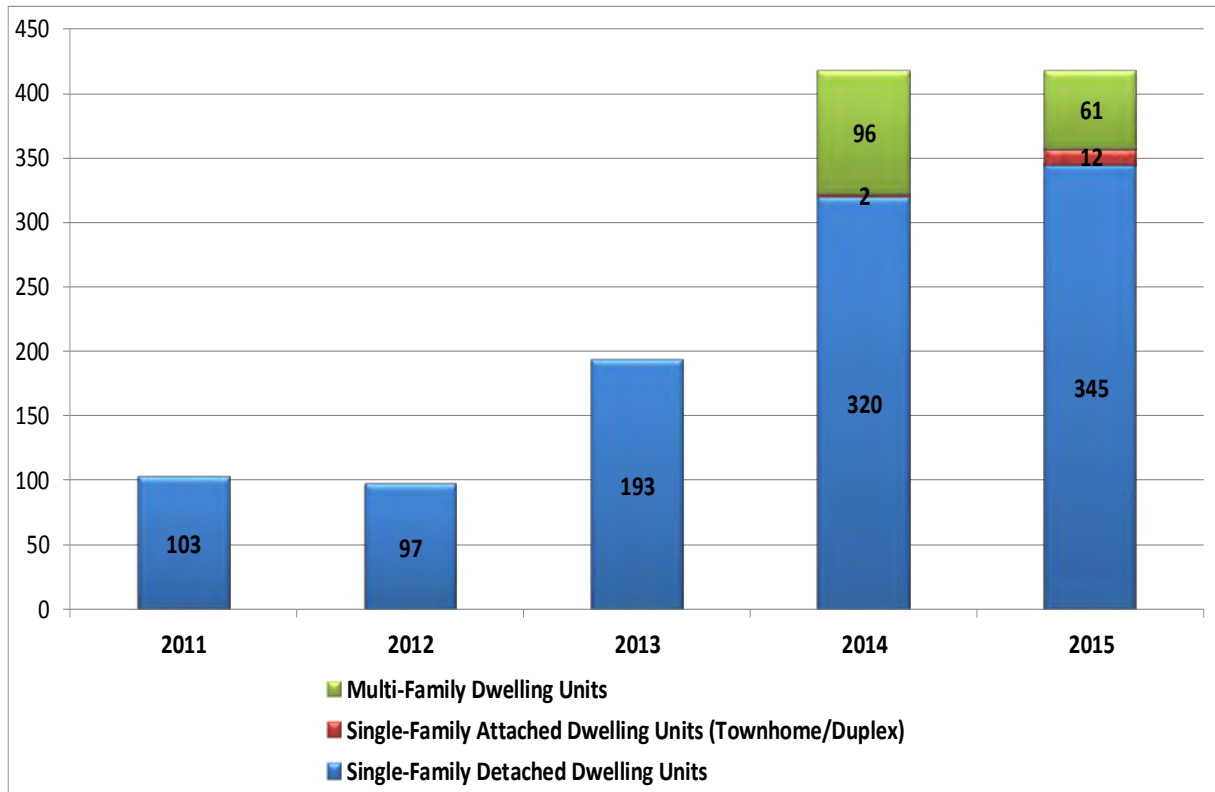
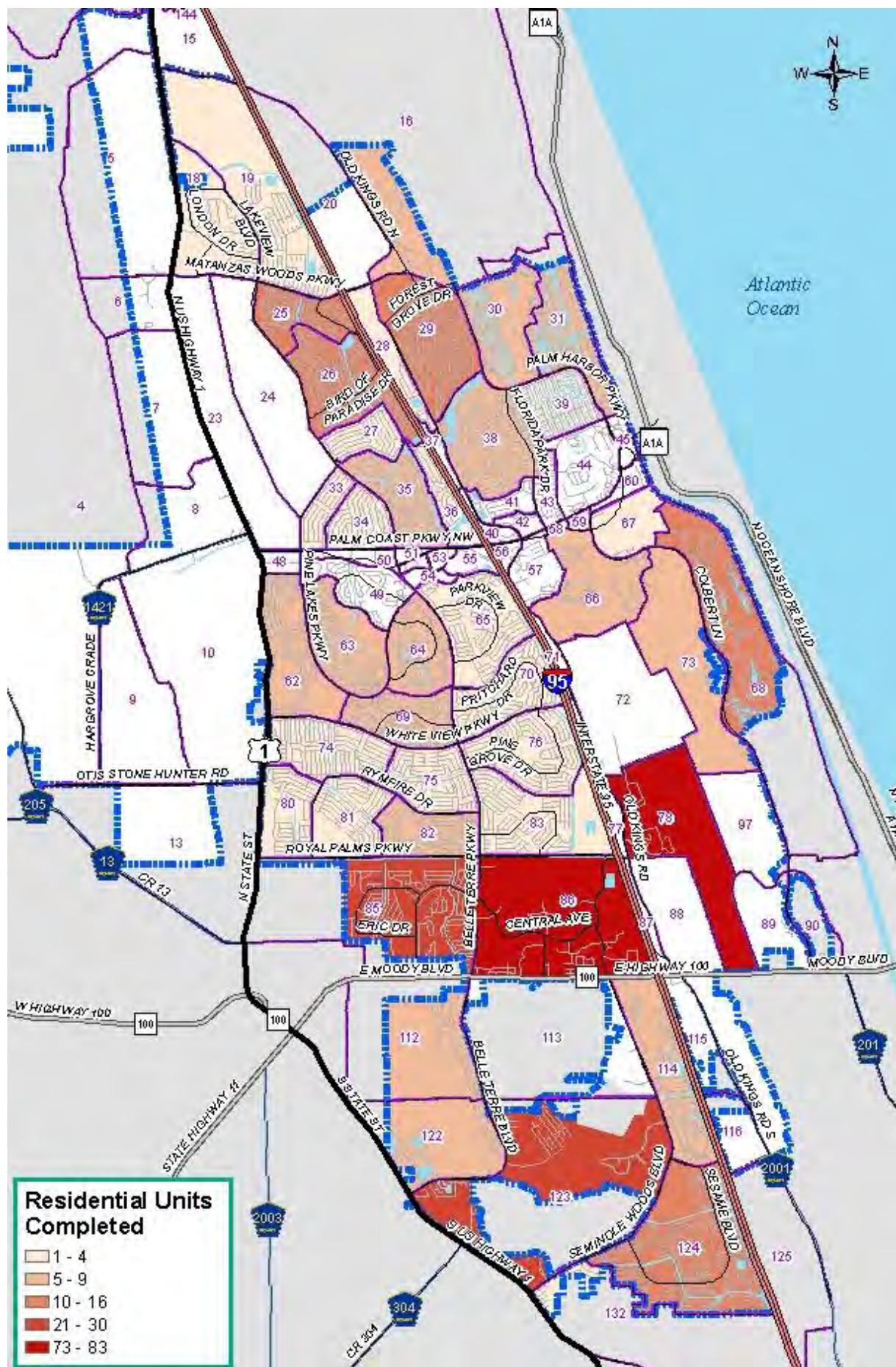


FIGURE 2.3 — RESIDENTIAL CONSTRUCTION COMPLETED MAP (2015)



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 355 single-family detached dwelling units were issued a building permit, along with building permits for 24 multi-family dwelling units. Overall, the number of permits issued decreased by 8% from 2014.

FIGURE 2.4 – RESIDENTIAL BUILDING PERMITS ISSUED TABLE (2011–2015)

	2011	2012	2013	2014	2015
Single-Family Detached Dwelling Units	79	155	263	339	355
Single-Family Attached Dwelling Units (Townhomes/Duplex)	0	0	2	12	0
Multi-Family Dwelling Units	0	0	116	61	24
Total Dwelling Units	220	79	381	412	379

FIGURE 2.5 – RESIDENTIAL BUILDING PERMITS ISSUED TABLE (2011–2015)

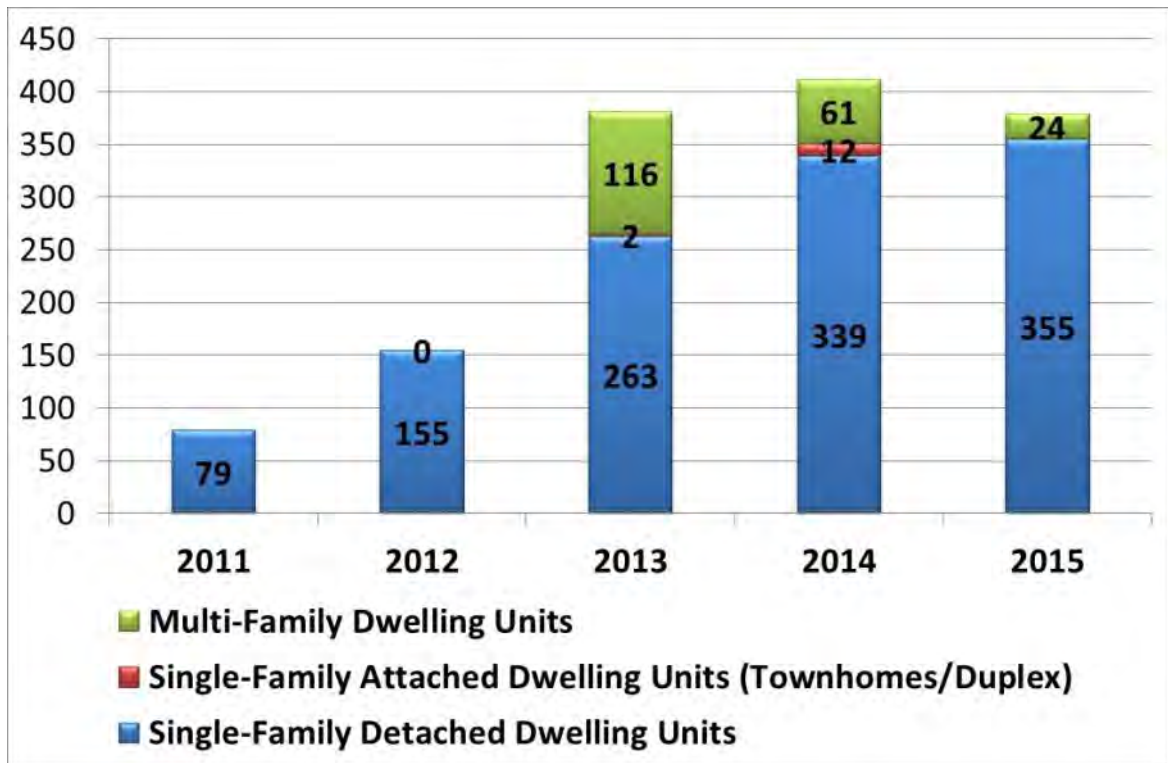
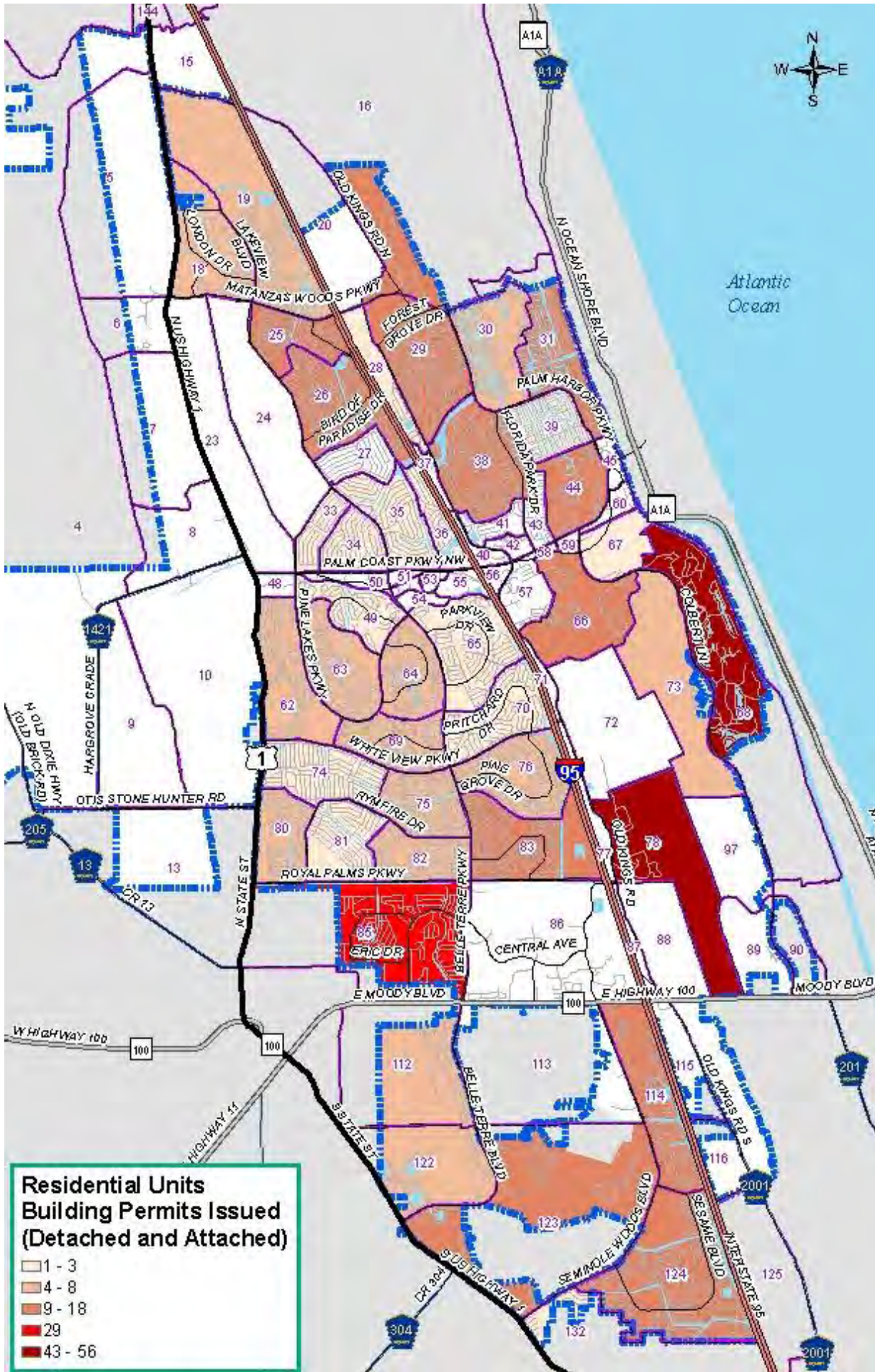


FIGURE 2.6 – RESIDENTIAL BUILDING PERMITS ISSUED MAP (2015)



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 2015, the following Plat and Development Orders were Approved.

Residential Plat and Development Orders Approved

	TAZ	Description
Long Creek View	30	4 Single-family lots
Park Place	76	123 Single family lots
Flagler Point Condominiums	115	96 multi-family units
Summary of Residential Units Approved in 2015	223 dwelling units	

SECTION 2

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EXISTING VACANT LOTS

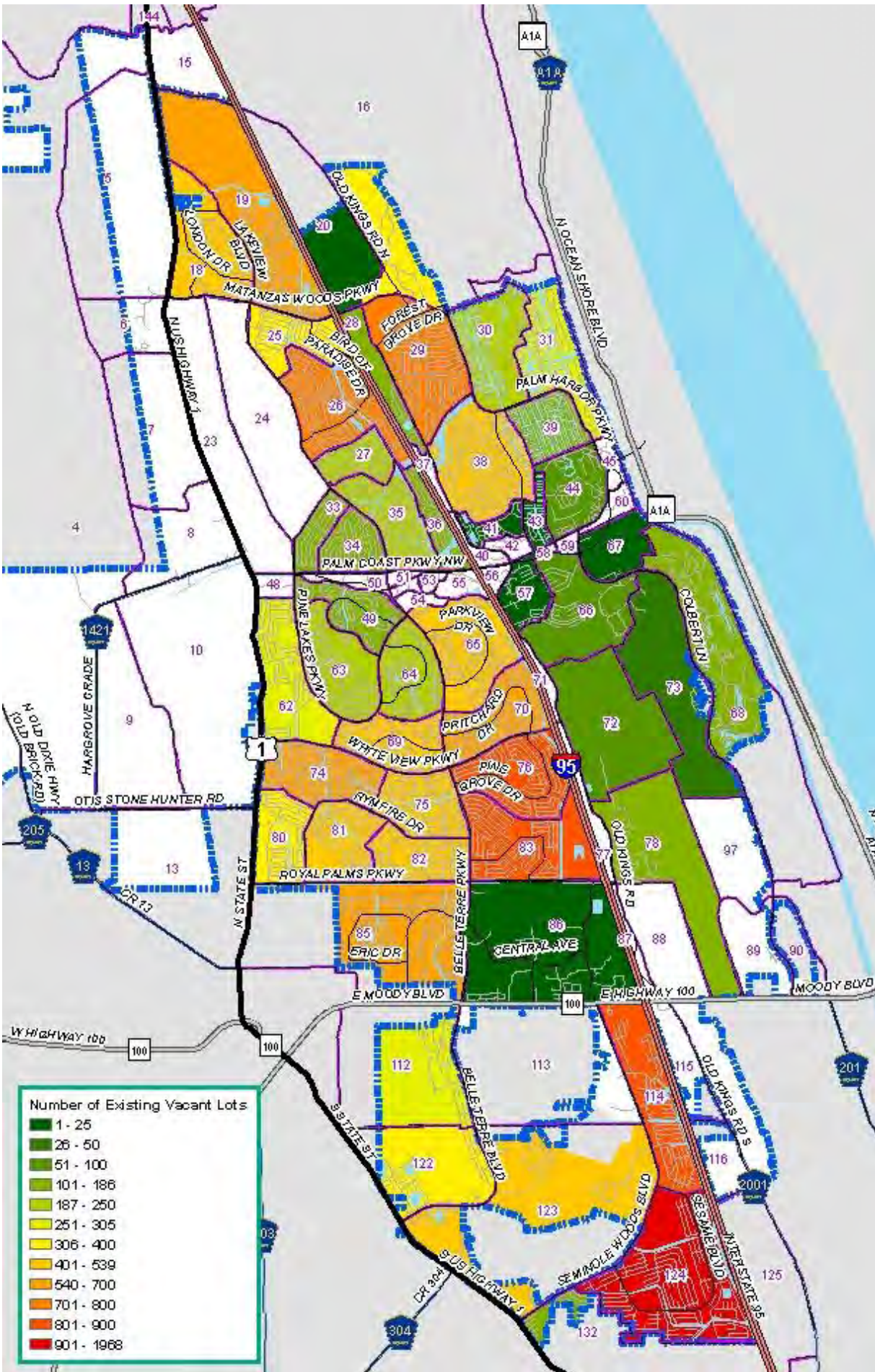
The City maintains a database of existing vacant lots for use by its various departments. At the end of 2015, the City contained approximately 17,254 vacant lots, slightly down from 17,472 in 2014. The number of existing vacant lots represents future potential growth in the City over an extended period, possibly up to 20 years.

FIGURE 2.9 – EXISTING VACANT RESIDENTIAL LOTS BY TAZ TABLE (2015)

TAZ	Total Lots	Occupied Lots	Vacant Lots	Percentage Vacant
16	346	23	323	93.35%
18	1,097	642	455	41.48%
19	1,415	762	653	46.15%
20	22	1	21	95.45%
25	865	541	324	37.46%
26	2,043	1,331	712	34.85%
27	778	559	219	28.15%
28	241	117	124	51.45%
29	1,885	1,142	743	39.42%
30	1,041	802	239	22.96%
31	1,102	802	300	27.22%
33	604	444	160	26.49%
34	805	606	199	24.72%
35	1,308	1,055	253	19.34%
36	470	303	167	35.53%
38	2,352	1,861	491	20.88%
39	916	782	134	14.63%
41	285	280	5	1.75%
43	232	209	23	9.91%
44	374	371	3	0.80%
49	859	695	164	19.09%
57	220	220	0	0.00%
62	1,189	911	278	23.38%
63	1,501	1,290	211	14.06%
64	1,184	959	225	19.00%
65	1,709	1,164	545	31.89%
66	583	505	78	13.38%
67	32	30	2	6.25%
68	1,443	1,331	112	7.76%
69	1,298	837	461	35.52%
70	1,554	955	599	38.55%
72	75	0	75	100.00%
73	186	153	33	17.74%
74	1,715	1,096	619	36.09%
75	1,453	915	538	37.03%
76	2,025	1,090	935	46.17%
78	260	217	43	16.54%
80	894	537	357	39.93%
81	1,125	691	434	38.58%
82	1,245	778	467	37.51%
83	1,761	950	811	46.05%
85	2,153	1475	678	31.49%
86				
112	732	426	306	41.80%
114	1,309	509	800	61.12%
122	742	411	331	44.61%
123	1,013	492	521	51.43%
124	3,174	1,238	1936	61.00%
132	323	176	147	45.51%
TOTAL	49,938	32,684	17,254	34.55%



FIGURE 2.10 – EXISTING VACANT RESIDENTIAL LOTS MAP (2015)



SECTION 2



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 156,979 square feet of non-residential space, significantly higher than last year’s total of 17,600 square feet. The total for 2015 was significantly boosted by the completion of two large scale projects; the reconstruction of the former Palm Harbor Shopping Center now known as Island Walk, and Palm Coast City Hall.

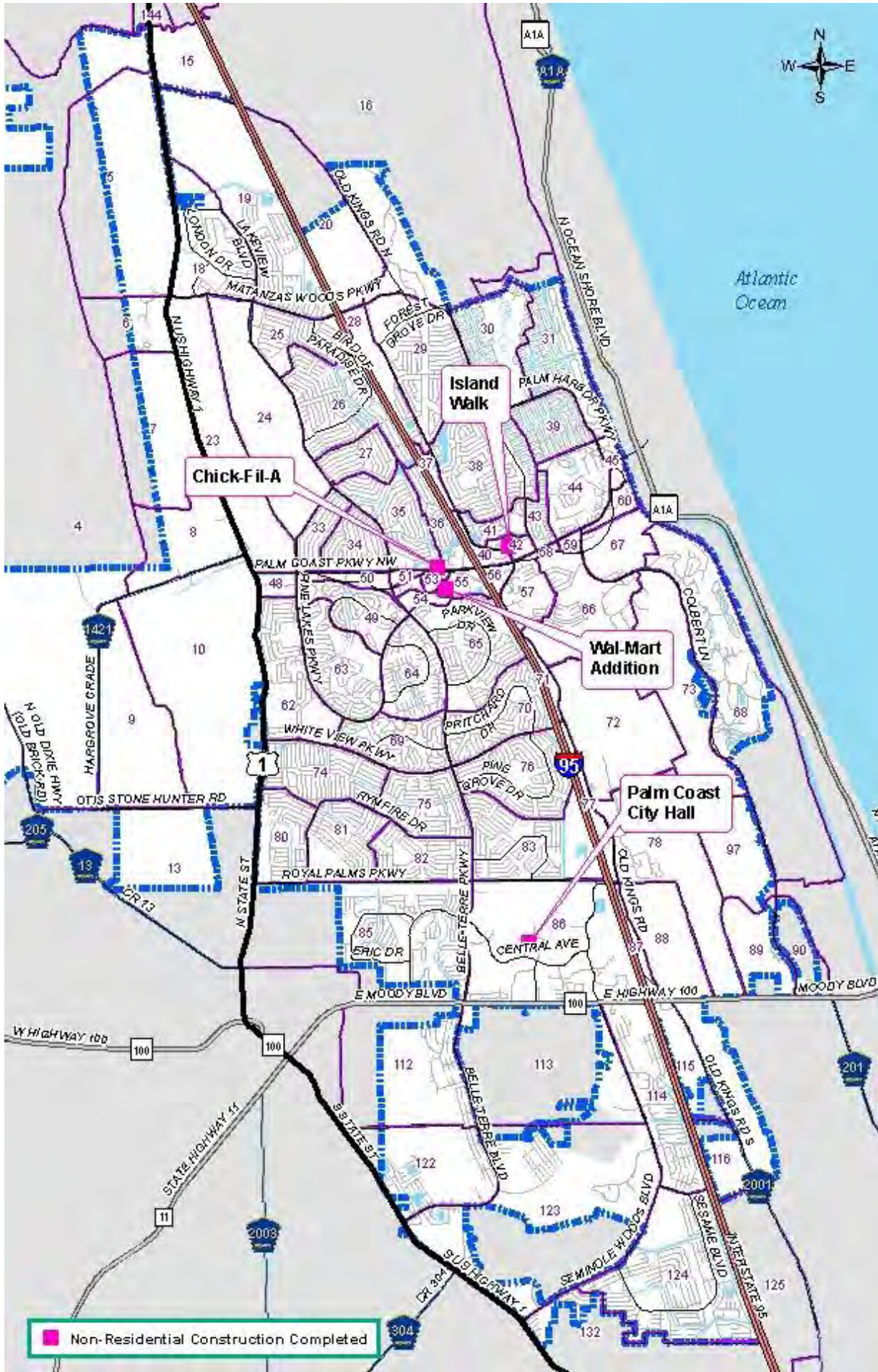
It is important to note that although the Island Walk project was the site of a previously developed site, the reconstruction is such that the site layout and the addition of more square footage essentially created a new retail center.

FIGURE 3.1 – NON-RESIDENTIAL CONSTRUCTION COMPLETED TABLE (2015)

Non-residential Construction Completed Table

	TAZ	Description
Island Walk (formerly Palm Harbor Shopping Center)	42	106,594 sq. ft. reconstruction of retail center
City Hall	86	41,309 sq. ft. government building
Chick-Fil-A	35	4,218 sq. ft. fast food restaurant
Wal-Mart Addition	55	4,858 sq. ft. retail addition
Summary of Non-Residential construction completed in 2015	156,979 Square Feet of Non-Residential	

FIGURE 3.2 – NON-RESIDENTIAL CONSTRUCTION COMPLETED (2015)



SECTION 3



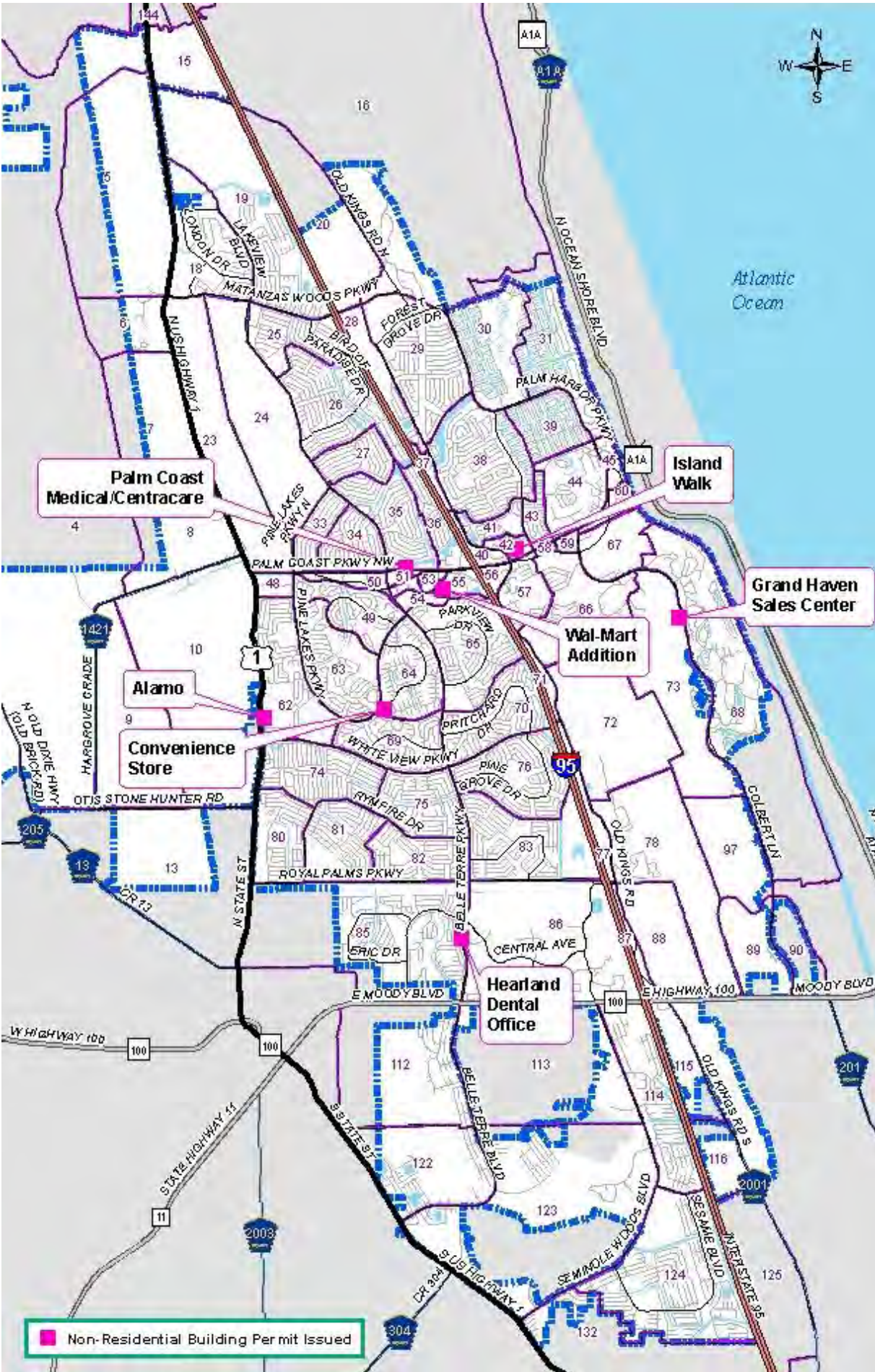
BUILDING PERMITS ISSUED

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 133,422 square feet of non-residential space, this amount is an increase over last year's total (2014) of 53,816.

FIGURE 3.3 – NON-RESIDENTIAL BUILDING PERMITS ISSUED TABLE (2015)

	TAZ	Description
Island Walk (formerly Palm Harbor Shopping Center)	42	106,594 Reconstruction of retail center
Alamo	62	4200 sq. ft. storage building
Wal-Mart Addition	55	4,858 sq. ft. retail addition
Grand Haven Sales Center	68	4,720 sq. ft. office
Palm Coast Medical/CentraCare	35	5,000 sq. ft. office building
Convenience Store	64	3,050 sq. ft. convenience store
Heartland Dental Office	86	5,000 sq. ft. commercial building
Summary of Non-Residential Building Permits Issued in 2015	133,422 Square Feet of Non-Residential	

FIGURE 3.4 – NON-RESIDENTIAL BUILDING PERMITS ISSUED MAP (2015)



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 2015, development orders approved totaled 43,144 square feet of non-residential uses. This is significantly less than last year's total of 164,480 sq. ft. However, it is important to note that last year's total was significantly boosted by the completion of the review for Island Walk.

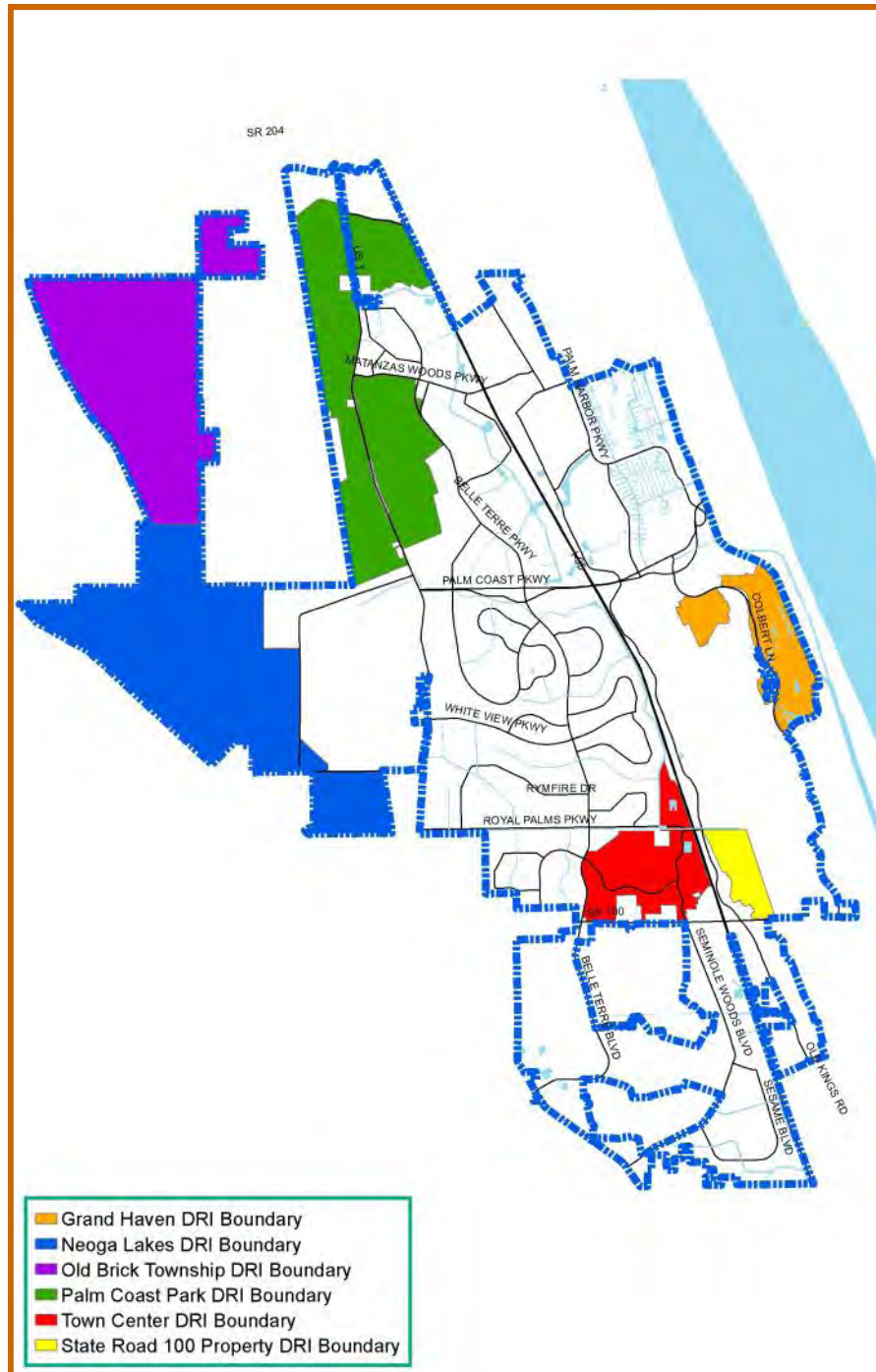
FIGURE 3.5 — NON-RESIDENTIAL DEVELOPMENT APPROVED TABLE (2015)

	TAZ	Description
Airport Commerce Center	113	Plat for 4 commercial lots (Total area of 29.7 acres)
Grand Landings Recreational Center	123	2,352 sq. ft. recreational area
Palm Coast Medical/Centracare	35	5,000 sq. ft. office building
Heartland Dental	86	5,000 sq. ft. commercial building
Christ the King Learning Center	10	13,794 sq. ft. institutional
Walmart Addition	55	4,858 sq. ft. retail
Grand Haven Sales Center	68	4,720 sq. ft. office
Palm Coast Arts Foundation	86	7,420 sq. ft. pavilion
Summary of Non-Residential Development Approved in 2015	43,144 Square Feet of Non-Residential	

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.

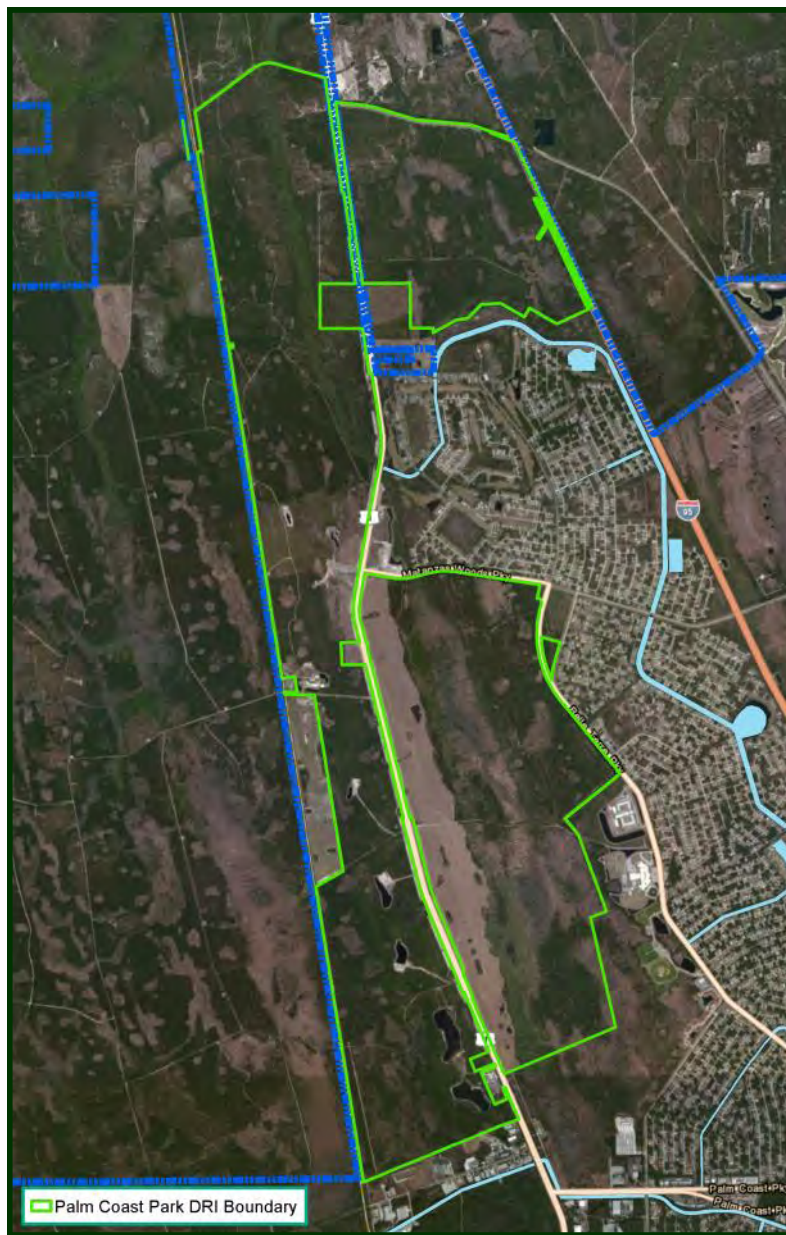
FIGURE 4.1 – MAJOR DEVELOPMENT LOCATION MAP



PALM COAST PARK DRI

The Palm Coast Park DRI was approved on December 7, 2004 and amended on October 11, 2012. The approved development plan includes 3,600 dwelling units and 2,480,000 square feet of non-residential space over three phases. The development order has a buildout date through Dec. 31, 2034.

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 2015.

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

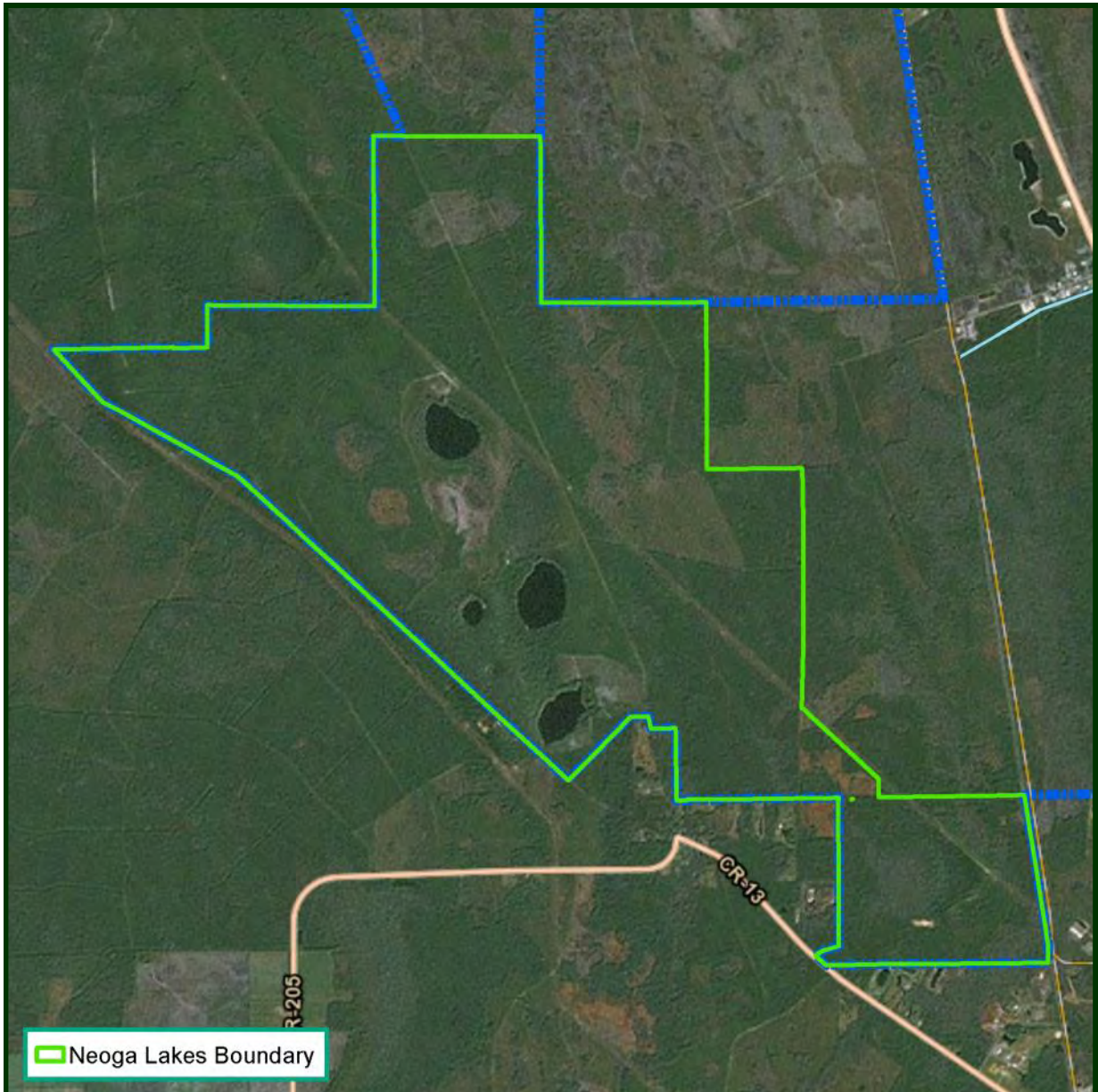


	DRI Entitlement	Development Approval	Building Permits Issued	Construction Completed
Residential	2,500 du	272 du	272 du	272 du
Retail/Comm/Office	4,800,000 sf	785,139 sf	747,499 sf	712,320 sf
Movie Theater	2,400 seats	2,224 seats	2,224 seats	2,224 seats
Lodging	480 rooms	201 rooms	121 rooms	121 rooms
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

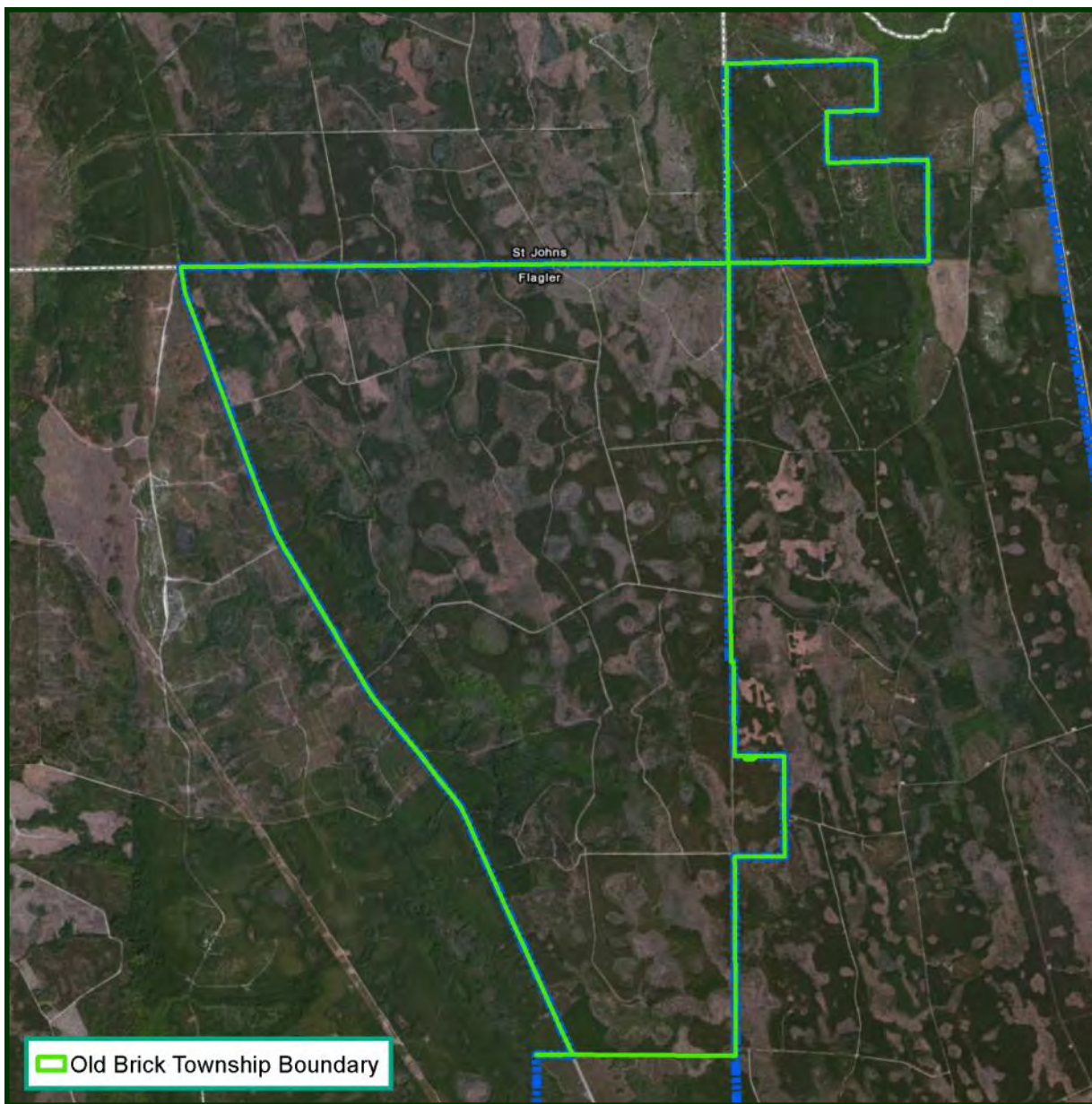


	DRI ENTITLEMENT	DEVELOPMENT APPROVAL	BUILDING PERMITS ISSUED	CONSTRUCTION COMPLETED
RESIDENTIAL	7,000 du	-	-	-
RETAIL USES	354,000 sf	-	-	-
OFFICE USES	45,000 sf	-	-	-
CIVIC USES	222,000 sf	-	-	-
EMPLOYMENT CENTER	1,870,000 sf	-	-	-

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

The City approved a Future Land Use Map amendment for 203 acres (Grand Landings North) which will result in a potential net increase of 355 dwelling units.

CONVERSION OF RESIDENTIAL UNITS

The City did not review any conversions or redevelopment of residential units in 2015.

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.

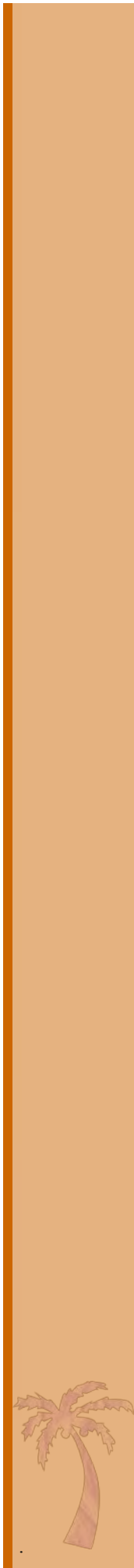
OLD BRICK TOWNSHIP DRI SCHOOL SITE

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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