



## 2018 ANNUAL REPORT



TUSCAN GARDENS ASSISTED LIVING FACILITY



PALM COAST COMMUNITY CENTER



CREEKSIDE AT GRAND HAVEN

## GROWTH AND DEVELOPMENT TRENDS IN THE CITY OF PALM COAST

COMMUNITY DEVELOPMENT DEPARTMENT

# 2018 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 tracks for 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 2010 and 2017 demographics using the 5-year American Community Survey (ACS) is provided below. A comparison between the 2010 ACS and the latest 5-year ACS shows that the percentage of total population under 18 years of age in the City decreased while the percentage of total population over 65 years old increased. This is reflected in the increase in median age from 44.4 years to 47.7. Overall, the City continues to age and tends to be older than the national average in terms of median age and percentage of population 65 years and older (nearly double the national percentage).

FIGURE 1.1 — GENERAL DEMOGRAPHICS TABLE

	City of Palm Coast 5-Year American Community Survey (2006-2010)	City of Palm Coast 5-Year American Community Survey (2013-2017)	National 5-Year American Community Survey (2013-2017)
% of Population Under 18 Years	21.30%	19.2%	22.9%
% of Population 65 Years and over	21.8%	27.0%	14.9%
Median Age	44.4	47.7	37.8
Average Household Size	2.51	2.76	2.63
Median Household Income	\$48,042	\$51,208	\$57,652
Per Capita Income	\$23,044	\$23,853	\$31,177
Families Below Poverty Level	8.70%	8.70%	10.5%
Household Units	27,184	29,741	118,825,921
Tenure of All Occupied Housing Units (Owner Occupied)	85.9%	75.4%	63.8%

### POPULATION ESTIMATES / PROJECTIONS

The Bureau of Economic Business Research (BEBR) provides population estimates of the City's population every April 1<sup>st</sup>. Based on these estimates, the City's population grew by about 9.3% between 2014 and 2018 (See Figure 1.2).

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

	2014	2015	2016	2017	2018
Population	78,046	79,821	81,184	82,760	84,575
Growth Rate	1.27%	2.27%	1.71%	1.94%	2.19%

**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 double to about 158,577. These projections have been adjusted based on BEBR projections as noted in the footnotes below (See Figure 1.3 and 1.4 below).

FIGURE 1.3 — BEBR POPULATION PROJECTIONS TABLE

	2018	2020*	2025**	2030**	2035**	2040**
County Population Projection*	107,511	114,750	138,300	155,600	172,200	185,900
City Population Projection***	84,575	90,076	110,640	129,064	146,960	158,577
City Growth Rate	---	6.50%	22.83%	16.65%	13.87%	7.90%
*2020 Flagler County Population Projection is Average of Low and Medium BEBR Projections (Volume 49, Bulletin 174, January 2016) adjusted to mid-year						
**2025-2040 Flagler County Population Projection is Medium BEBR Projections (Volume 49, Bulletin 174, January 2016) adjusted to mid-year						
*** Assumes % of total Flagler County Population Projections						

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 719 dwelling units were issued a CO, this total is a 26% increase from 2017. This included a continuing increase in the number of attached single family units.

FIGURE 2.1 — RESIDENTIAL CONSTRUCTION COMPLETED TABLE (2014–2018)

	2014	2015	2016	2017	2018
Single-Family Detached Dwelling Units	320	345	356	555	623
Single-Family Attached Dwelling Units (Townhome/Duplex)	2	12	6	16	96
Multi-Family Dwelling Units	96	61	0	0	0
Total Dwelling Units	418	418	362	571	719

FIGURE 2.2 — RESIDENTIAL CONSTRUCTION COMPLETED CHART (2014–2018)

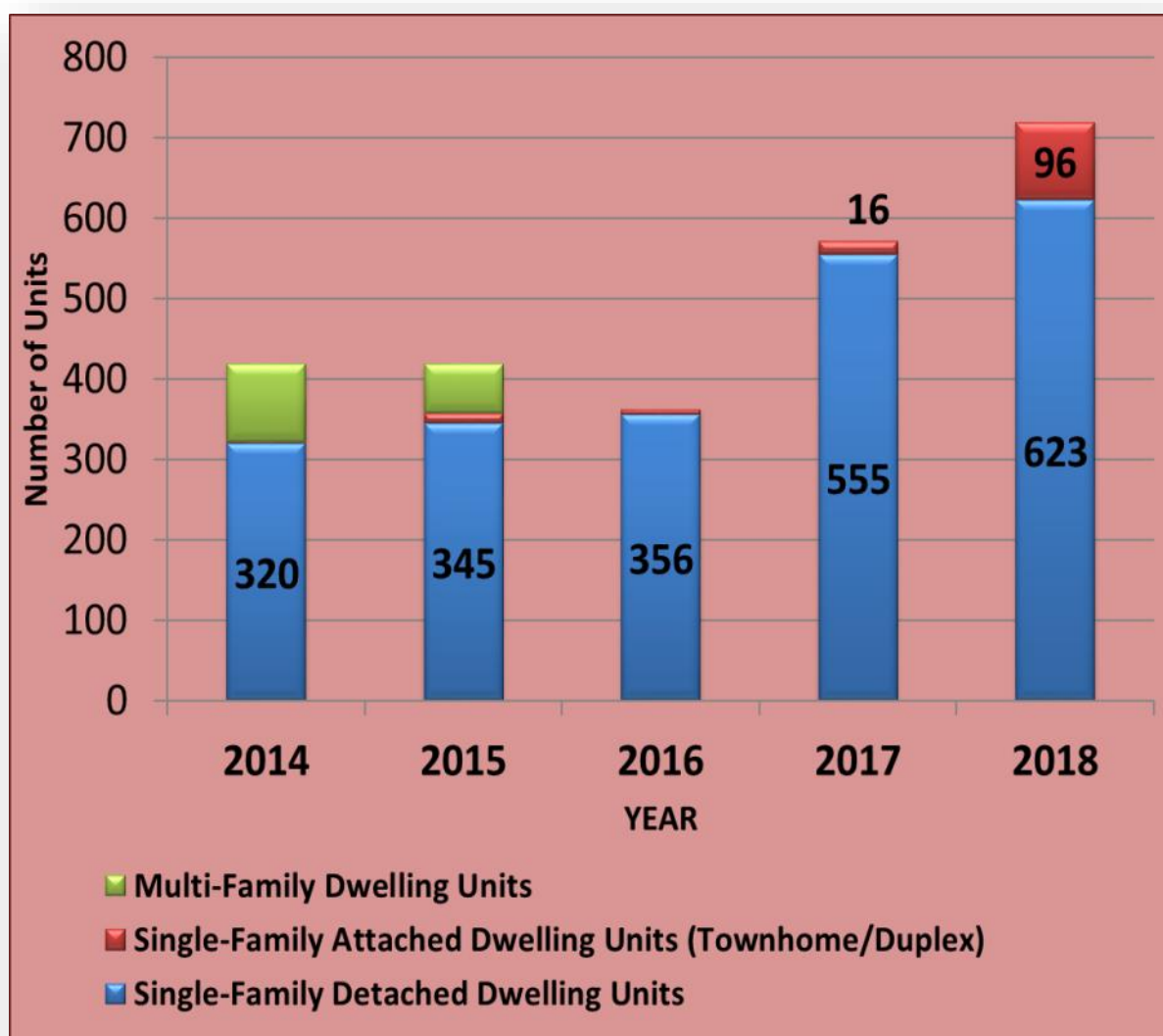
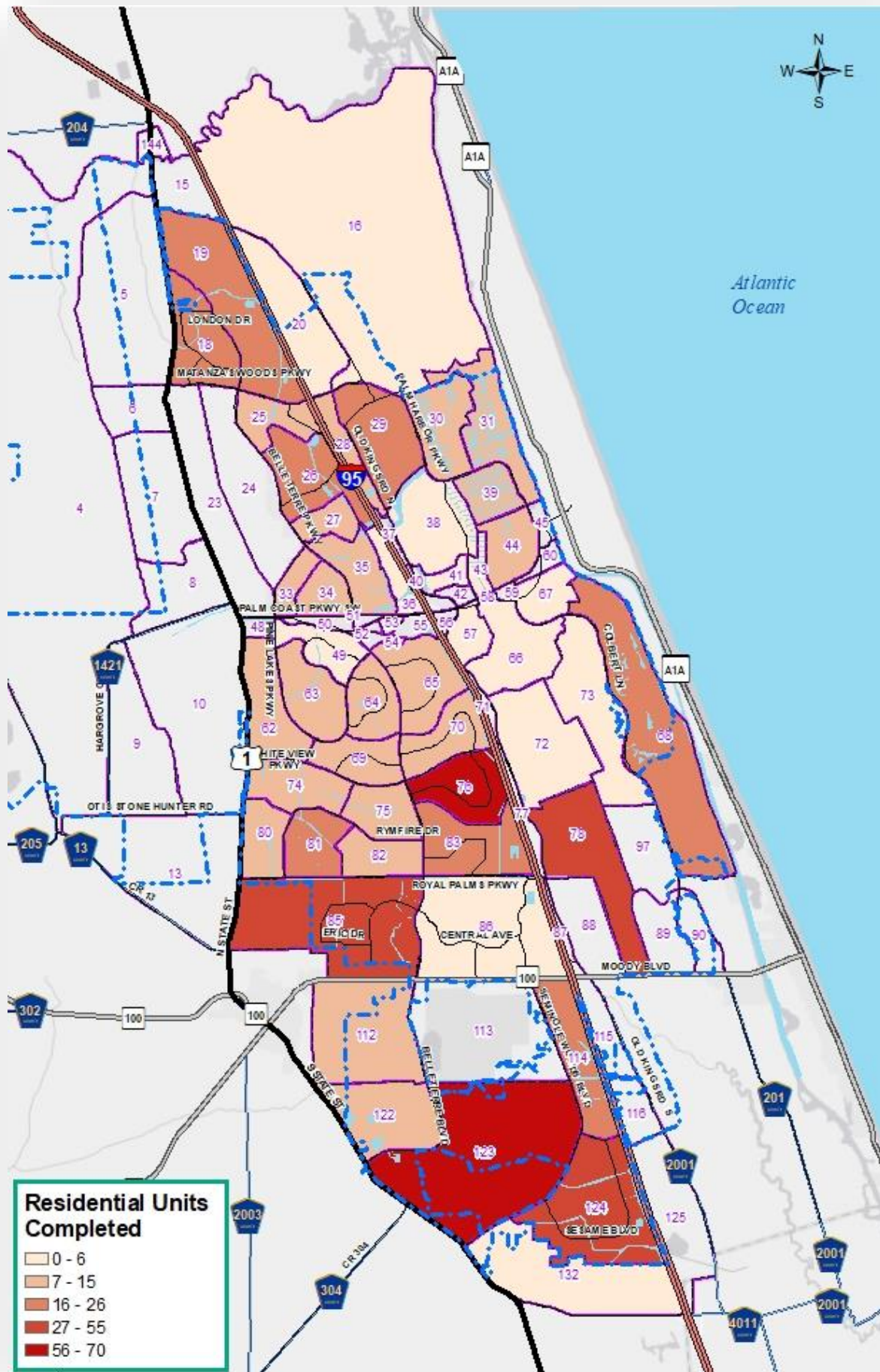




FIGURE 2.3 — RESIDENTIAL CONSTRUCTION COMPLETED MAP (2018)



## 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 715 single-family detached dwelling units and 166 single-family attached dwelling units were issued a building permit. Overall, the number of permits issued increased by 27% from 2017.

FIGURE 2.4 — RESIDENTIAL BUILDING PERMITS ISSUED TABLE (2014–2018)

	2014	2015	2016	2017	2018
Single-Family Detached Dwelling Units	339	355	538	630	715
Single-Family Attached Dwelling Units (Townhomes/Duplex)	12	0	12	64	166
Multi-Family Dwelling Units	61	24	0	0	0
Total Dwelling Units	412	379	550	694	881

FIGURE 2.5 — RESIDENTIAL BUILDING PERMITS ISSUED CHART (2014–2018)

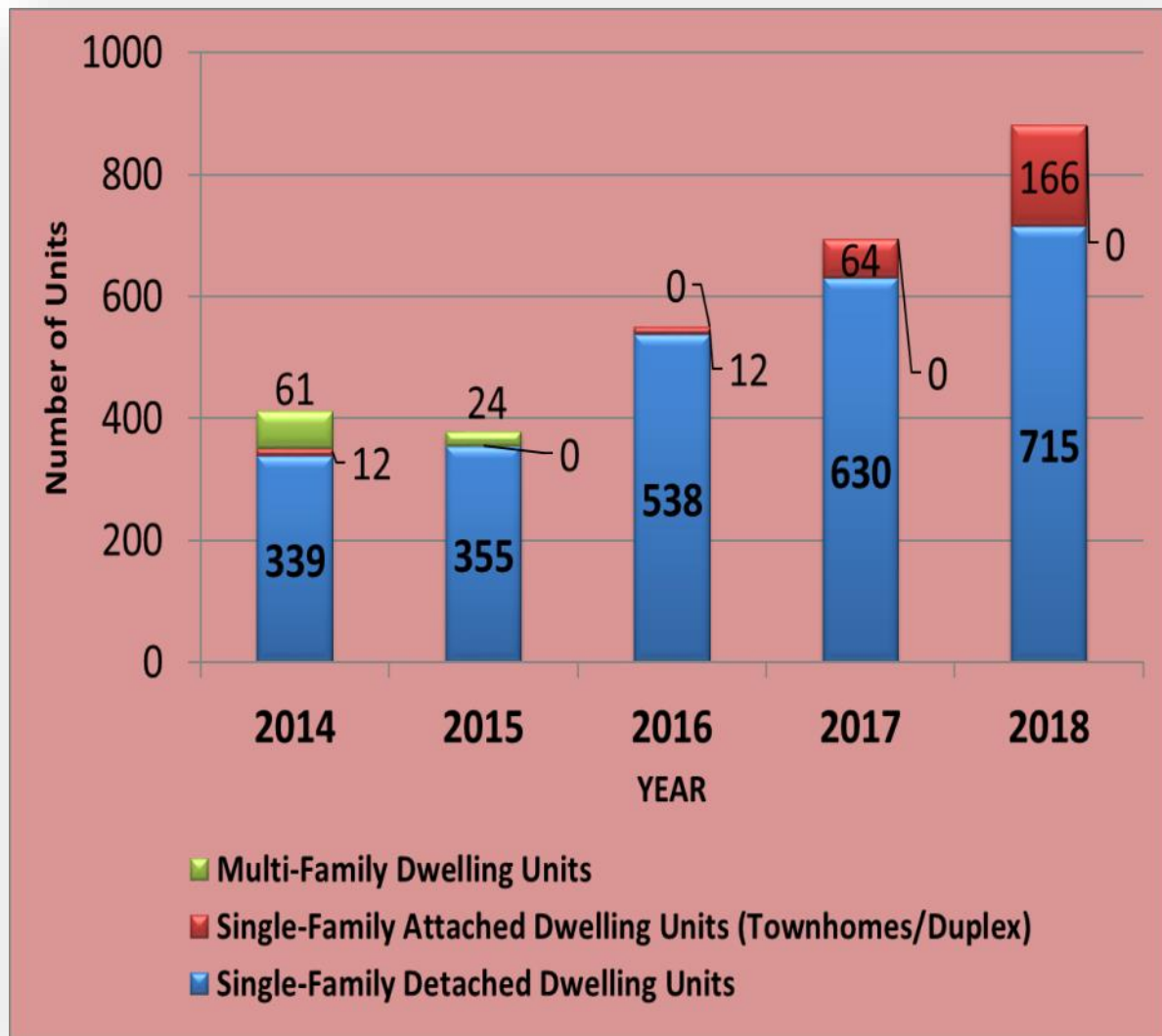
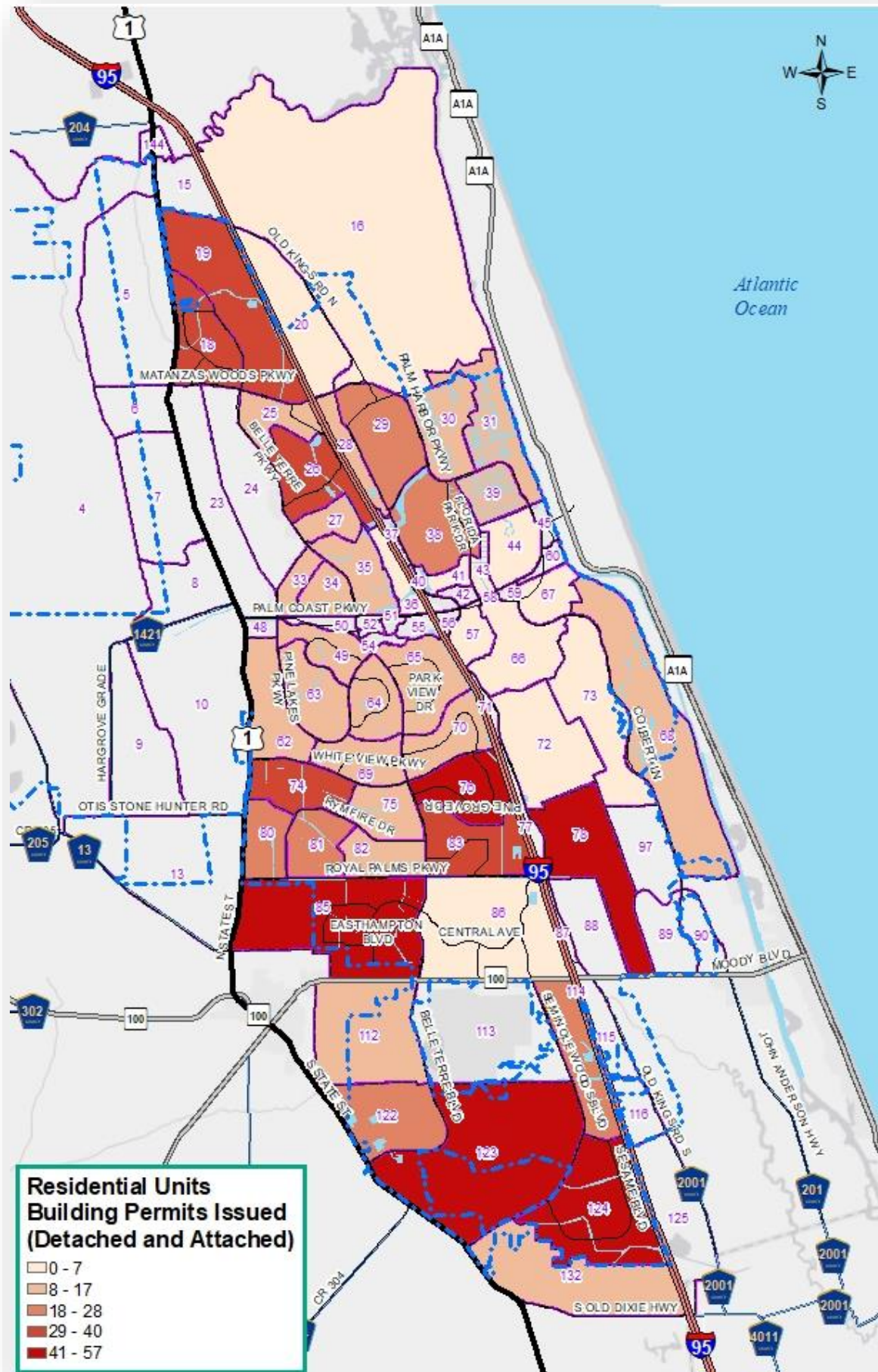




FIGURE 2.6 — RESIDENTIAL BUILDING PERMITS ISSUED MAP (2018)



## 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.

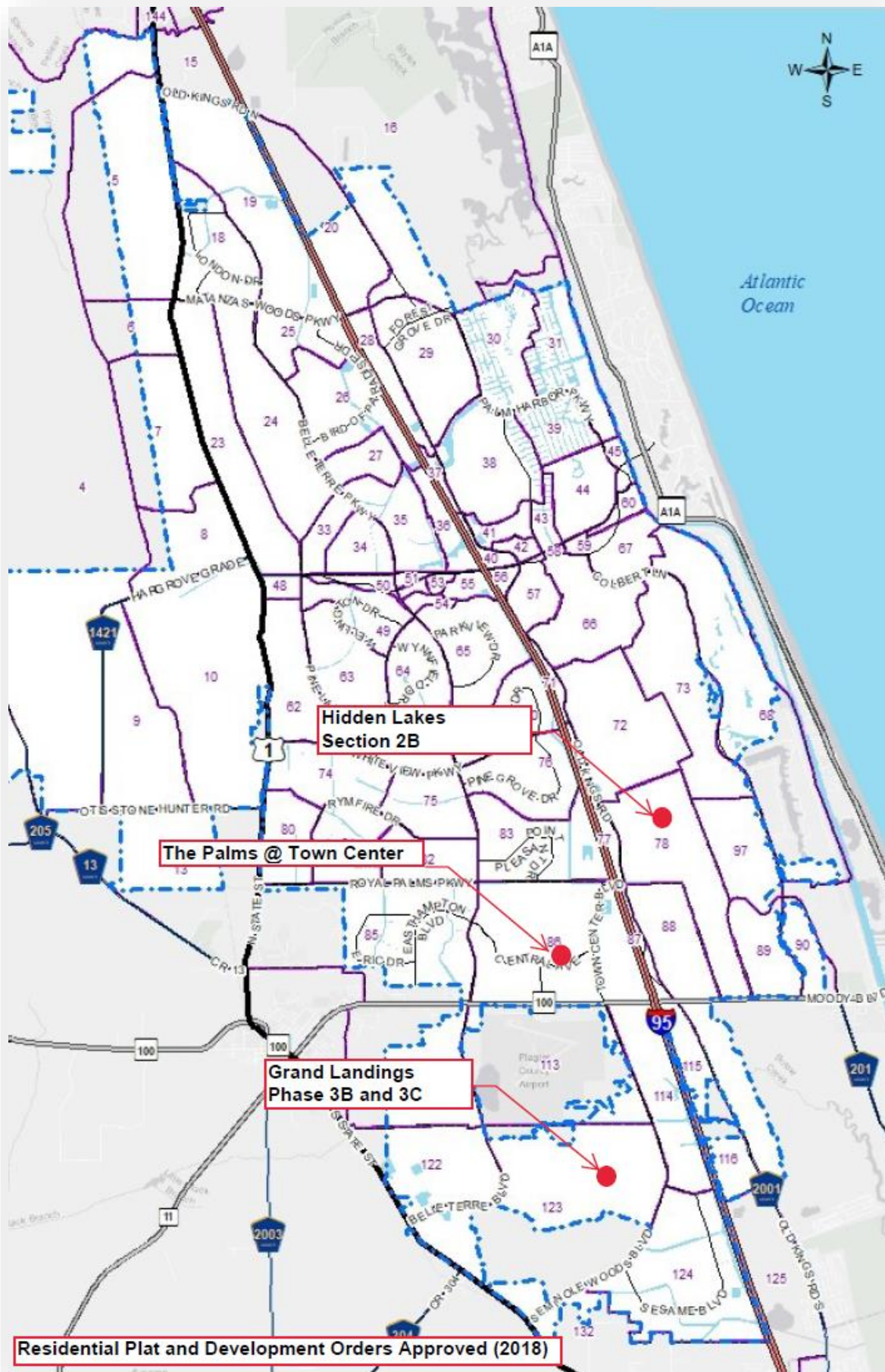
In 2018, the following Plat and Development Orders were Approved for residential development.

**FIGURE 2.7 — RESIDENTIAL PLAT AND DEVELOPMENT ORDERS APPROVED (2018)**

Residential Plat and Development Orders Approved			
	TAZ	# of Units	Description
Grand Landings Phase 3B	123	42	Final Plat
Grand Landings Phase 3C	123	26	Final Plat
Hidden Lakes Section 2B	78	59	Final Plat
The Palms @ Town Center	86	88	3 Buildings-Multi-family units
Summary of Residential Units Approved in 2018		215	Dwelling Units



FIGURE 2.8 — RESIDENTIAL PLAT AND DEVELOPMENT ORDERS APPROVED MAP (2018)



## EXISTING VACANT LOTS

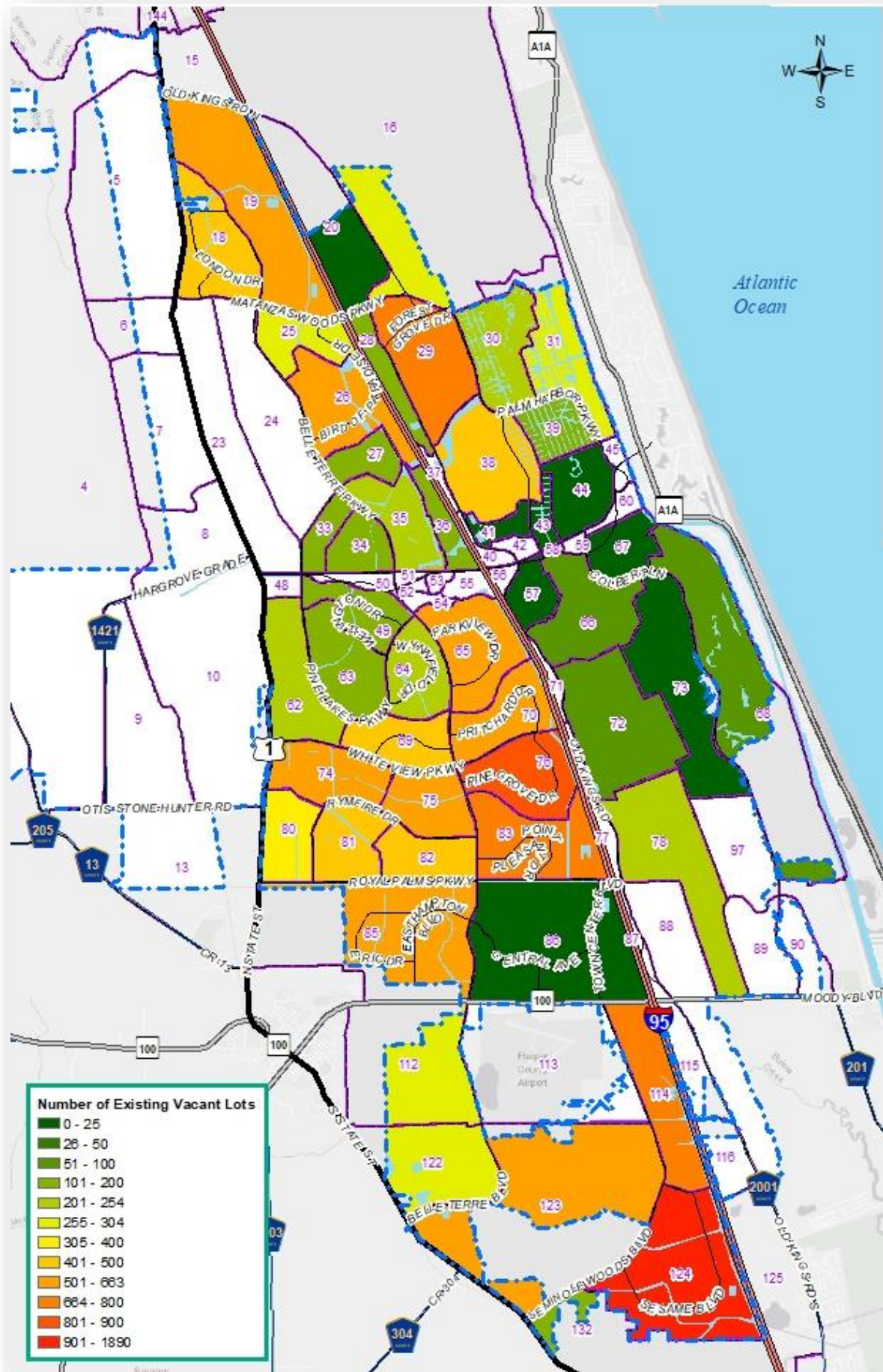
The City maintains a database of existing vacant lots for use by its various departments. At the end of 2018, the City contained approximately 16,545 vacant lots. The number of existing vacant lots represents future potential growth in the City over an extended period, possibly up to 20 years.

FIGURE 2.9 — EXISTING VACANT RESIDENTIAL LOTS BY TAZ TABLE (2018)

TAZ	Total Lots	Occupied Lots	Vacant Lots	Percentage Vacant
16	354	52	302	85.31%
18	1039	610	429	41.29%
19	1407	793	614	43.64%
20	22	1	21	95.45%
25	859	555	304	35.39%
26	2029	1366	663	32.68%
27	774	575	199	25.71%
28	236	114	122	51.69%
29	1875	1185	690	36.80%
30	1032	818	214	20.74%
31	1449	1172	277	19.12%
33	601	446	155	25.79%
34	786	607	179	22.77%
35	1309	1068	241	18.41%
36	467	305	162	34.69%
38	2309	1870	439	19.01%
39	959	830	129	13.45%
41	362	356	6	1.66%
43	321	300	21	6.54%
44	967	956	11	1.14%
49	977	824	153	15.66%
57	424	420	4	0.94%
62	1172	918	254	21.67%
63	1493	1295	198	13.26%
64	1177	971	206	17.50%
65	1694	1176	518	30.58%
66	577	520	57	9.88%
67	33	30	3	9.09%
68	2320	2230	90	3.88%
69	1291	847	444	34.39%
70	1543	960	583	37.78%
72	78	3	75	96.15%
73	183	163	20	10.93%
74	1708	1102	606	35.48%
75	1441	921	520	36.09%
76	2016	1186	830	41.17%
78	503	292	211	41.95%
80	888	544	344	38.74%
81	1117	700	417	37.33%
82	1242	788	454	36.55%
83	1752	964	788	44.98%
85	2511	1932	579	23.06%
86	9	9	0	0.00%
112	730	448	282	38.63%
114	1301	522	779	59.88%
122	736	433	303	41.17%
123	1202	600	602	50.08%
124	3156	1266	1890	59.89%
132	486	329	157	32.30%
<b>TOTAL</b>	<b>52,917</b>	<b>36,372</b>	<b>16,545</b>	<b>31.27%</b>



FIGURE 2.10 — EXISTING VACANT RESIDENTIAL LOTS MAP (2018)





## SECTION 3: NON-RESIDENTIAL DEVELOPMENT

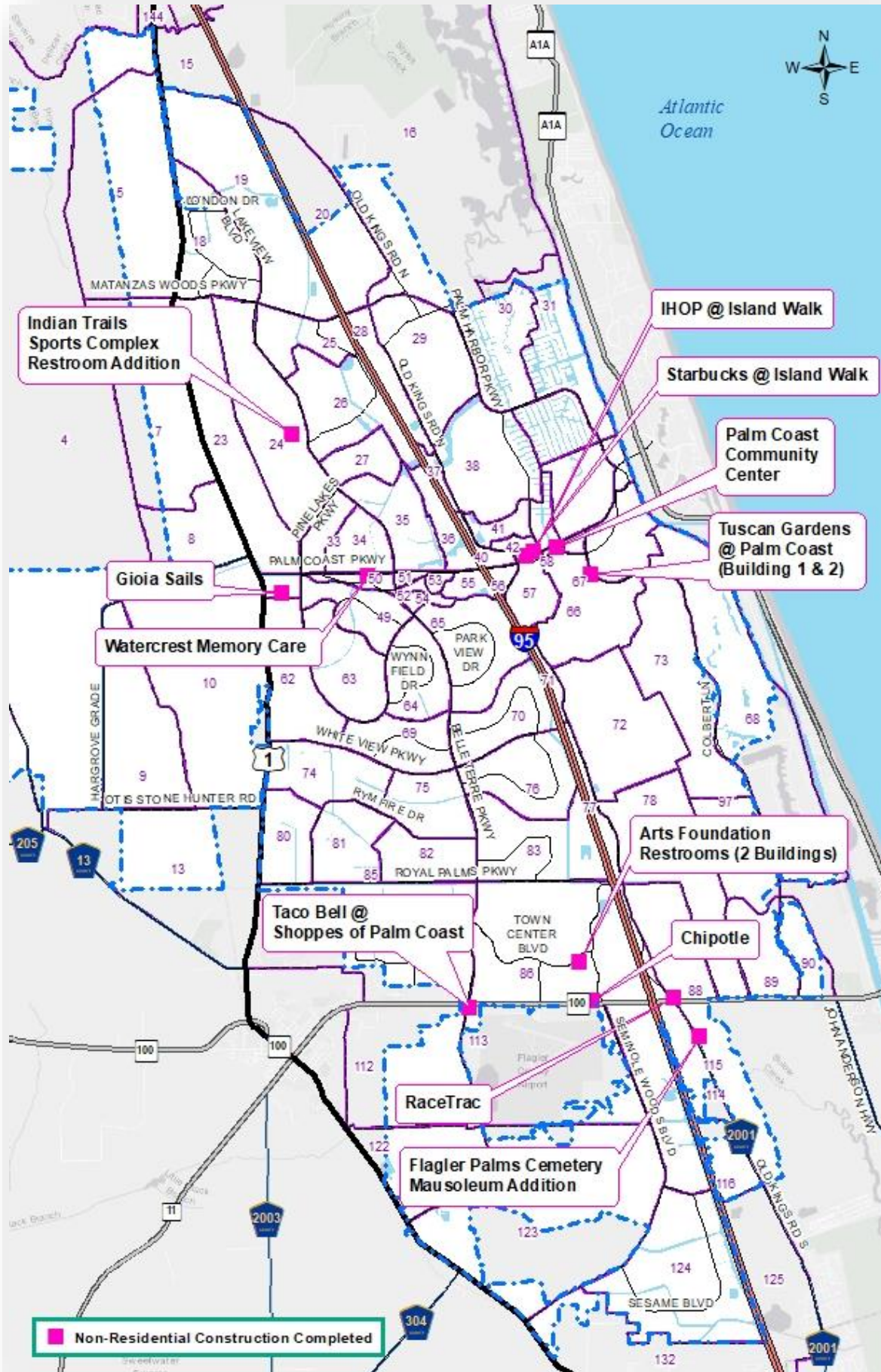
### CONSTRUCTION COMPLETED

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 with a total of 256,411 sq. ft. of non-residential space. The total for 2018 is an increase from the previous year’s total of 150,657 square feet. This year’s non-residential projects is highlighted by the completion of 135,883 sq. ft. of memory care and assisted living facility in the Tuscan Gardens project, and a 30,000 sq. ft. manufacturing facility for Gioia Sails. Other highlights include a 45,952 sq. ft. memory care facility as well as the 18,330 sq. ft. City of Palm Coast Community Center.

FIGURE 3.1 — NON-RESIDENTIAL CONSTRUCTION COMPLETED TABLE (2018)

Project Name	TAZ	Sq. Ft.	Description
Tuscan Gardens @ Palm Coast (Building 1 & 2)	66	135,883	Bldg. 1 - 2-story Memory Care Facility Bldg. 2 - 4-story Assisted Living Facility
Taco Bell @ Shoppes of Palm Coast	86	1,961	Food/Drinking Establishment
IHOP @ Island Walk	42	4,641	Food/Drinking Establishment
Starbucks @ Island Walk	42	2,064	Food/Drinking Establishment
RaceTrac	88	5,411	Convenience Store/Gas Station
Gioia Sails	48	30,000	Manufacturing Facility
Flagler Palms Cemetery Mausoleum Addition	115	1,697	Cemetery
Watercrest Market Street	50	45,952	Memory care/64 units
Palm Coast Community Center	58	18,330	Community Center
Chipotle	86	5,896	Food/Drinking Establishment
Arts Foundation Restrooms (2 Buildings)	86	3,104	Restroom Facilities
Indian Trails Sports Complex Restroom Addition	24	1,472	Restroom Facilities
Summary of Non-Residential construction completed in 2018		256,411	Sq. ft. of non-residential

FIGURE 3.2 — NON-RESIDENTIAL CONSTRUCTION COMPLETED (2018)



## BUILDING PERMITS ISSUED

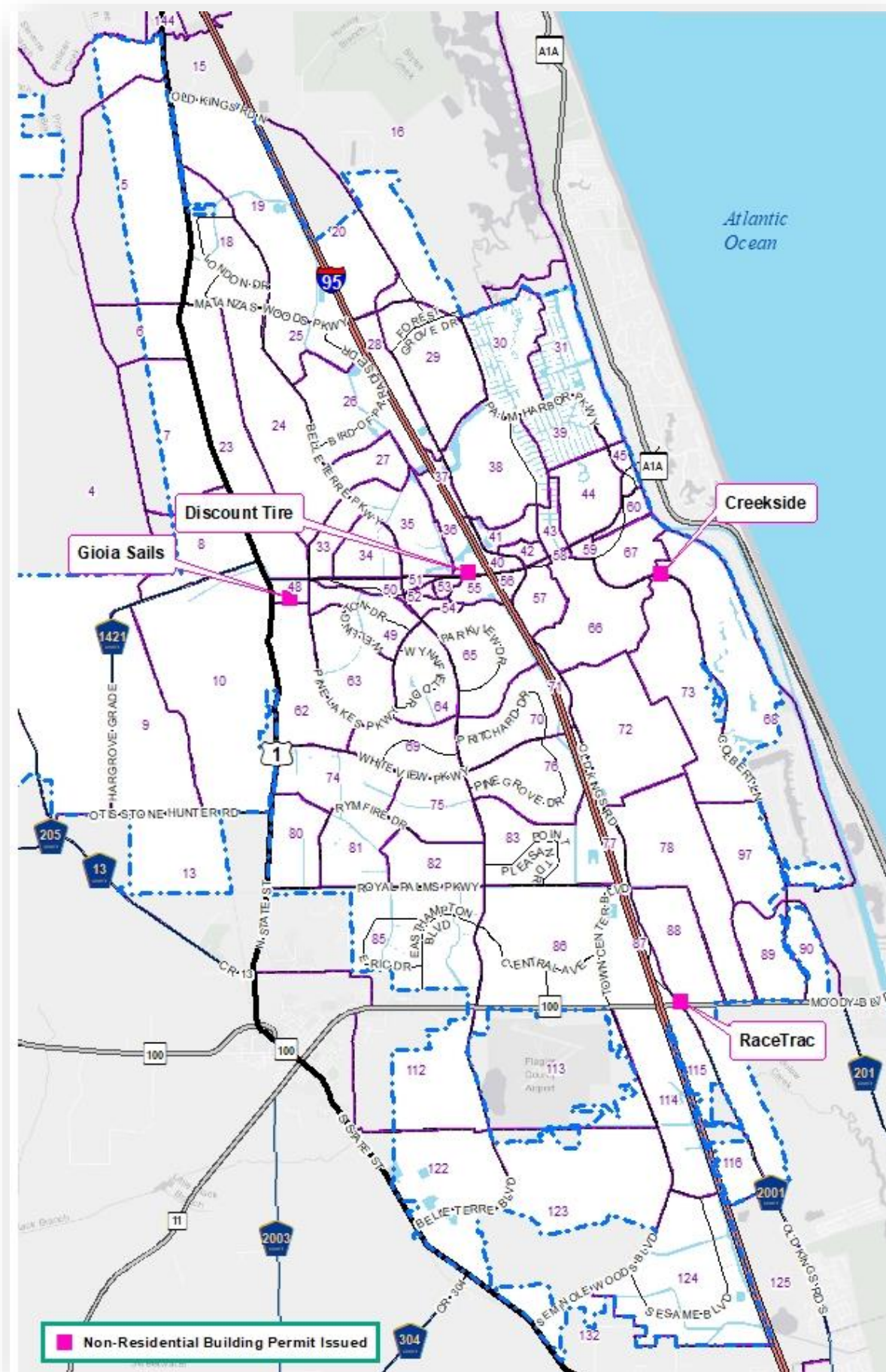
The Building Division of the Community Development Department issues and tracks building permits for non-residential construction projects. Building permits indicate that a non-residential construction project is under construction and may be completed in the near future (0-3 years). During the past year, building permits were issued for projects that included a total of 48,528 square feet of non-residential space, this amount is less than last year's total (2017) of 241,049.

FIGURE 3.3 — NON-RESIDENTIAL BUILDING PERMITS ISSUED TABLE (2018)

Project Name	TAZ	Sq. Ft.	Description
RaceTrac	88	5,411	Convenience Store/Gas Station
Gioia Sails	48	30,000	Manufacturing Facility
Creekside at Grand Haven	67	3,500	Office Building
Discount Tire	36	9,617	Tire Retail Store
Summary of Non-Residential Building Permits Issued in 2018		48,528	Sq. Ft. of non-residential



FIGURE 3.4 — NON-RESIDENTIAL BUILDING PERMITS ISSUED MAP (2018)



## DEVELOPMENT APPROVED

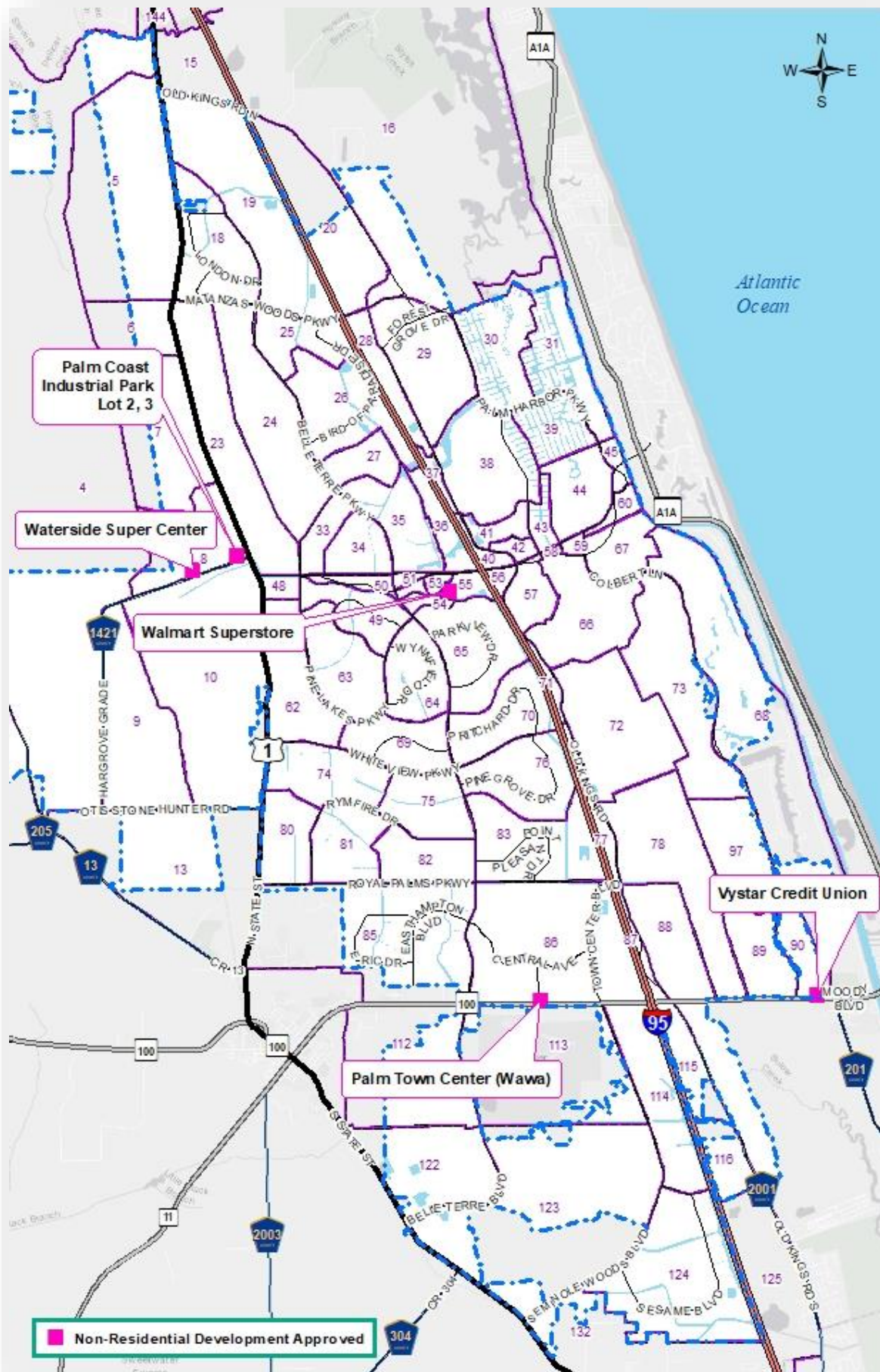
The Planning Division of the Community Development Department issues development orders for non-residential projects. Development orders for non-residential projects allow an applicant to apply for a building permit to construct the residential project and may predict future growth in the short term (1–5 years), depending on a variety of factors. In 2018, development orders totaled 14,185 sq.ft. of non-residential uses, this is a decrease from 2017 total of 76,674 sq. ft.

FIGURE 3.5 — NON-RESIDENTIAL DEVELOPMENT APPROVED TABLE (2018)

Project Name	TAZ	Sq. Ft.	Description
Walmart Superstore	55	1,266	Retail Addition
Waterside Super Center	8		Commercial Plat - 2 lots
Palm Town Center (Wawa)	86	6,119	Convenience Store/Gas Station
Palm Coast Industrial Park/Lot 2	8	4,000	Industrial Building Addition
Vystar Credit Union	90	2,800	Bank
Summary of Non-Residential Development Approved in 2018		14,185	Sq. Ft. of Non Residential



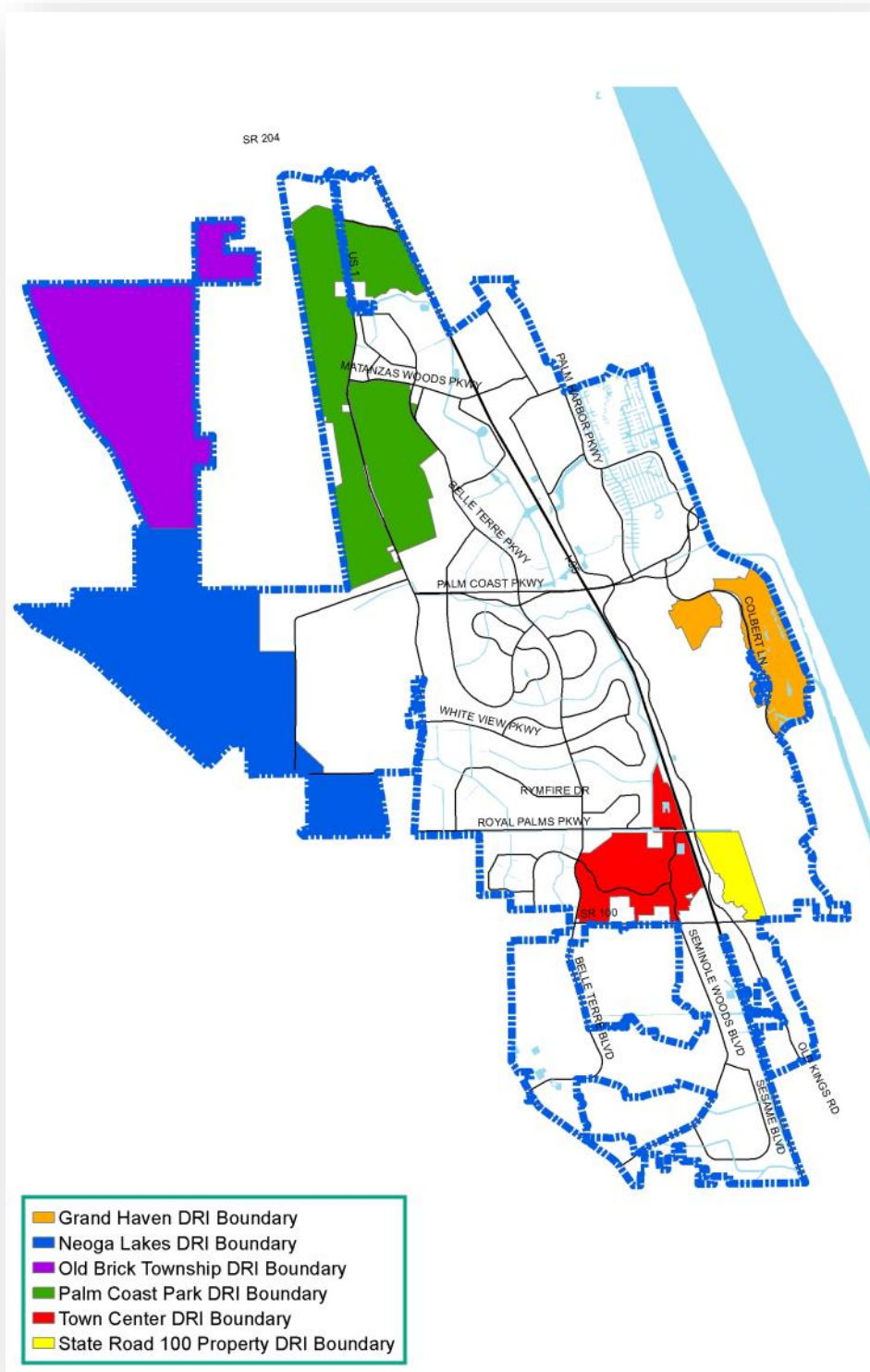
FIGURE 3.6 — NON-RESIDENTIAL DEVELOPMENT APPROVED MAP (2018)



## 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 shown below and the pages following provide a detailed status of the approved major developments.

FIGURE 4.1 — MAJOR DEVELOPMENT LOCATION MAP

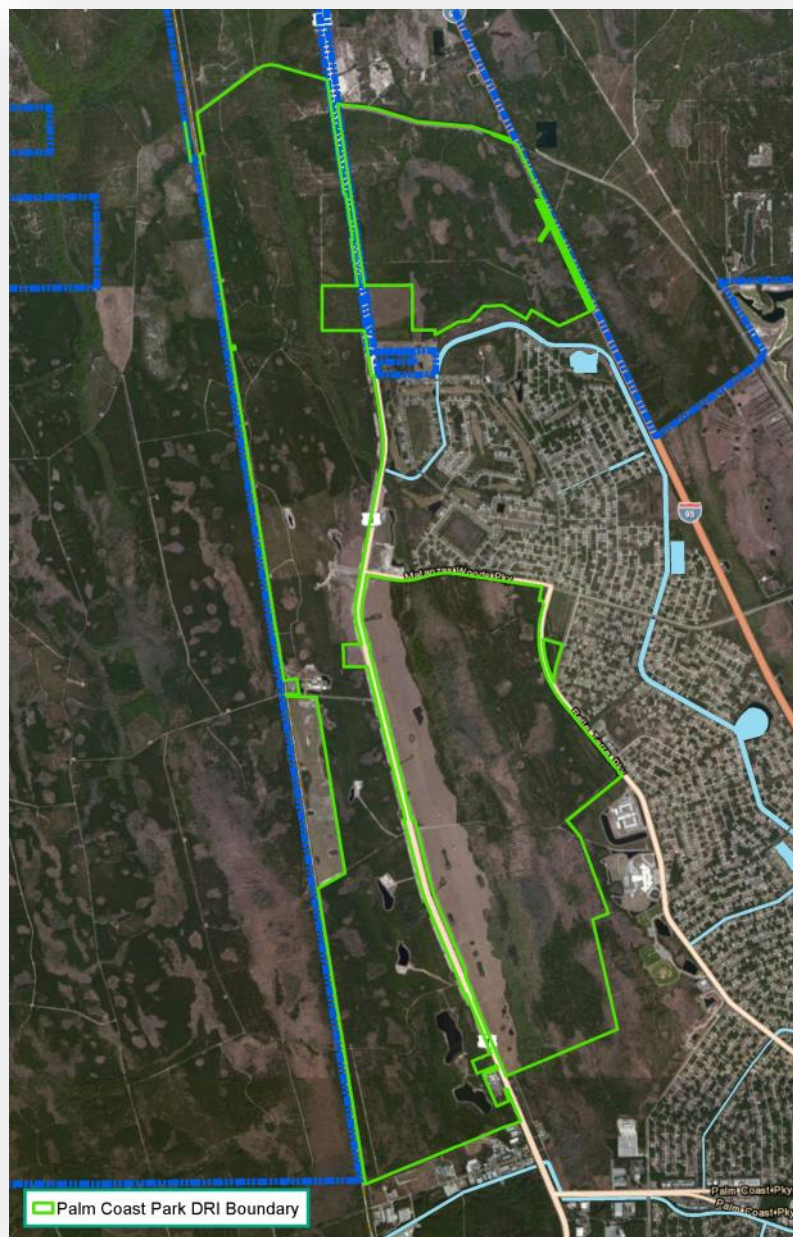




## PALM COAST PARK DRI

The Palm Coast Park DRI was approved on December 7, 2004. In 2018, the Development Order was amended to increase the maximum number of dwelling units to 4,960. As part of the increase in dwelling units, the maximum retail commercial entitlements were reduced from 1,500,000 sq. ft. to 1,317,800 sq. ft.). 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	4,960 du	220	-	-
OFFICE	800,000 sf	-	-	-
RETAIL COMMERCIAL	1,317,800 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 DRI MAP AND TABLE



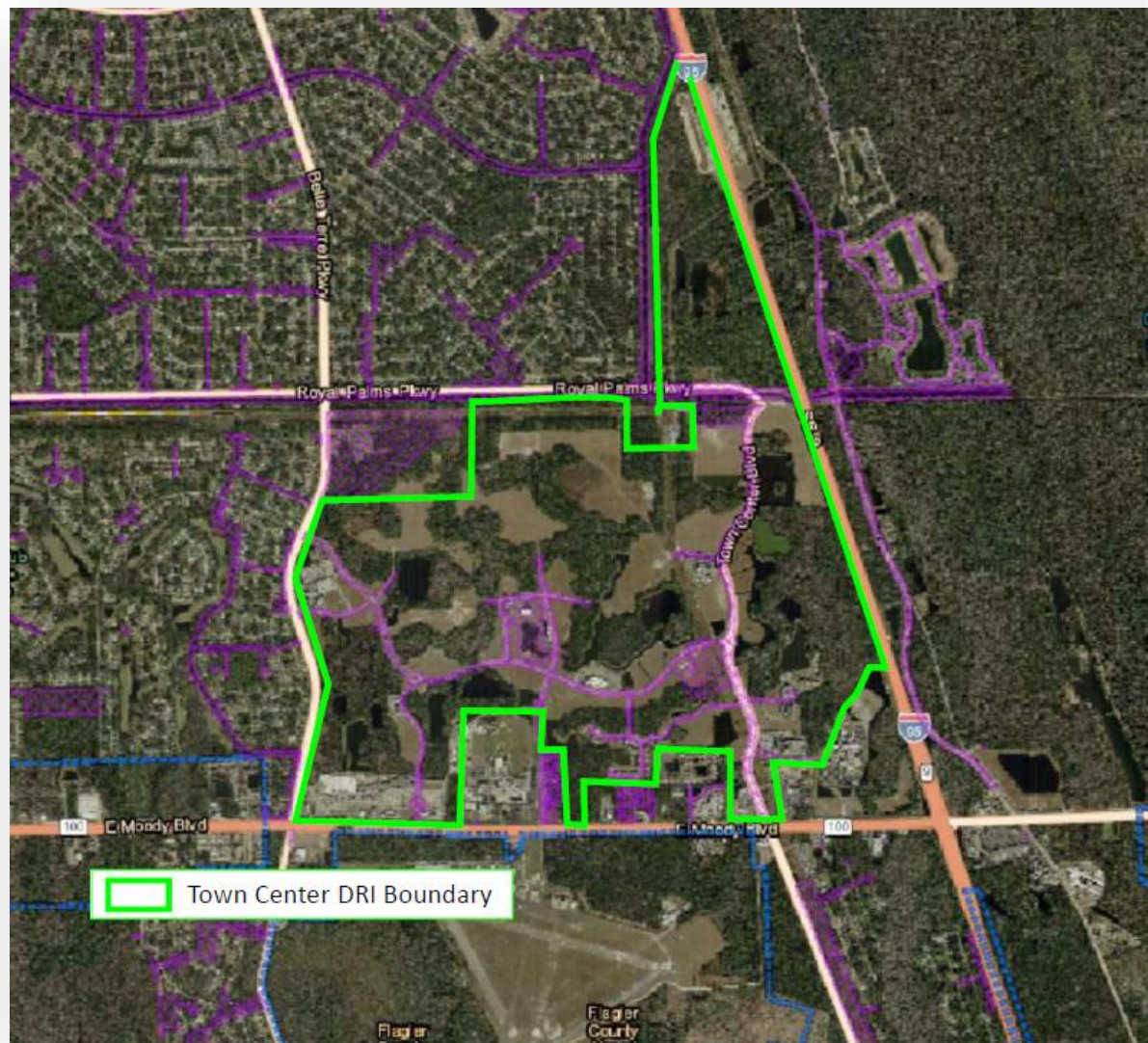
	ENTITLEMENT	DEVELOPMENT APPROVAL	BUILDING PERMITS ISSUED	CONSTRUCTION COMPLETED
RESIDENTIAL (SF)	773 du	-	-	-
RESIDENTIAL (MF)	1,638 du	-	-	-
GENERAL RETAIL	50,000 sf	-	-	-
GENERAL OFFICE	30,000 sf	-	-	-
HOTEL	150 rooms	-	-	-



## 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. A summary of development approvals is provided in the table below.

FIGURE 4.4 — TOWN CENTER DRI MAP AND TABLE



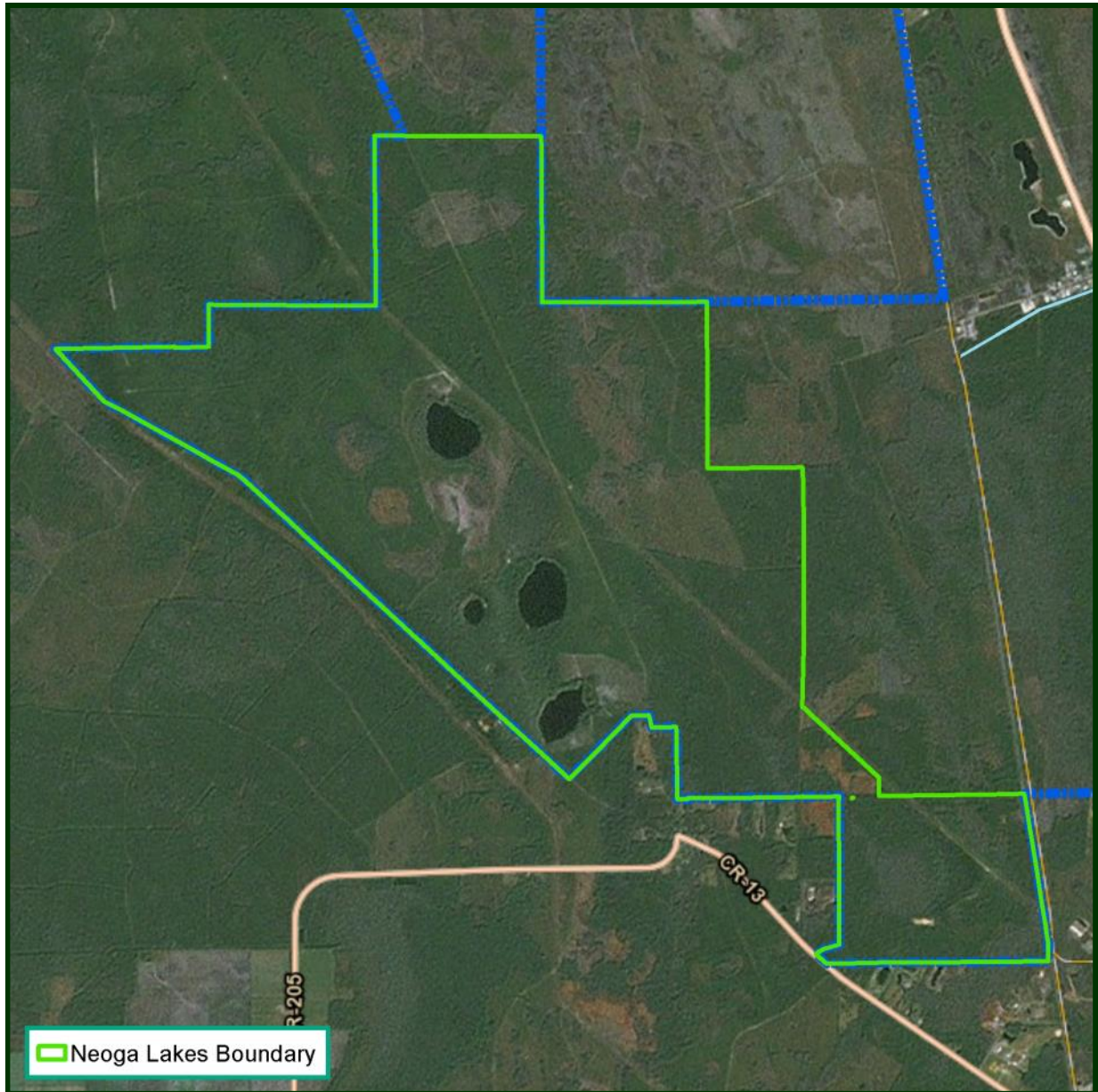
Land Use Category (Totals as of Dec. 31, 2018)	Entitlement	Entitlement Approval	Construction Completed	Entitlement Remaining
Residential	2,500 du	542	219	1,958
Non-Residential	4,800,000 sf	1,760,277	742,612	3,039,723
Movie Theater	2,400 seats	2,400	2,400	
Lodging	480 rooms	407	327	73
Nursing Home	240 beds			240



# 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

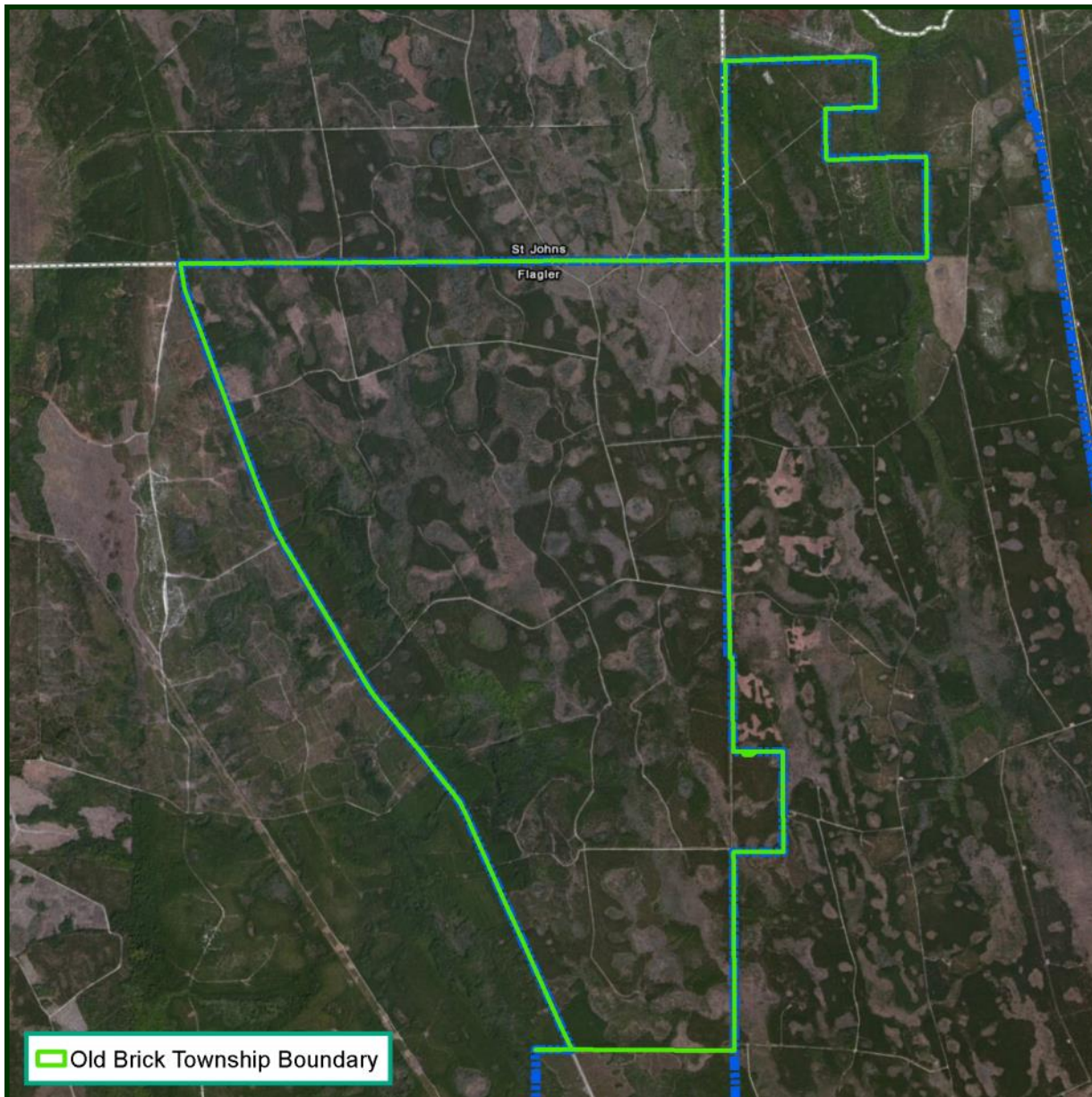


	ENTITLEMENT	DEVELOPMENT APPROVAL	BUILDING PERMITS ISSUED	CONSTRUCTION COMPLETED
RESIDENTIAL	7,000 du	-	-	-
RETAIL USES	354,000 sf	-	-	-
OFFICE USES	45,000 sf	-	-	-
CIVIC USES	222,000 sf	-	-	-
EMPLOYMENT CENTER	1,870,000 sf	-	-	-

## 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



	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 completed the FLUM amendment process for a newly annexed area in 2018. The subject parcel is the site of development to be known as Colbert Preserve/Roberts Pointe MPD. This project was approved for up to 1,500 dwelling units.

### CONVERSION OF RESIDENTIAL UNITS

The City did not review any conversions or redevelopment of residential units in 2018.

### DEVELOPMENT APPROVALS WITH SCHOOL SITES

#### PALM COAST PARK DRI SCHOOL SITE

The developer of Sawmill Creek and the School District agreed on a 30-acre school site within the Palm Coast Park Development of Regional Impact (DRI) in 2018.

#### 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.

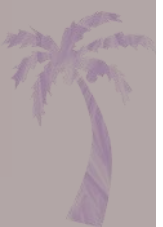
#### OLD BRICK TOWNSHIP DRI SCHOOL SITE

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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