



2019 ANNUAL REPORT



GROWTH AND DEVELOPMENT TRENDS IN THE CITY OF PALM COAST

COMMUNITY DEVELOPMENT DEPARTMENT



2019 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 2018 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 48.9. Overall, the City continues to age and tends to be older than the average for the State of Florida in terms of median age and percentage of population 65 years and older.

FIGURE 1.1 — GENERAL DEMOGRAPHICS TABLE

	City of Palm Coast	City of Palm Coast	National
	5-Year American Community Survey (2006-2010)	5-Year American Community Survey (2014-2018)	5-Year American Community Survey (2014-2018)
% of Population Under 18 Years	21.30%	18.7%	20.1%
% of Population 65 Years and over	21.8%	27.8%	19.7%
Median Age	44.4	48.9	41.9
Average Household Size	2.51	2.73	2.65
Median Household Income	\$48,042	\$53,820	\$53,267
Per Capita Income	\$23,044	\$25,557	\$30,197
Families Below Poverty Level	8.70%	8.0%	10.6%
Household Units	27,184	30,677	7,621,760
Tenure of All Occupied Housing Units (Owner Occupied)	85.9%	74.1%	65.0%

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 10% between 2015 and 2019 (See Figure 1.2).

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

	2015	2016	2017	2018	2019
Population	79,821	81,184	82,760	84,575	86,768
Growth Rate	1.27%	2.27%	1.71%	2.19%	2.59%

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

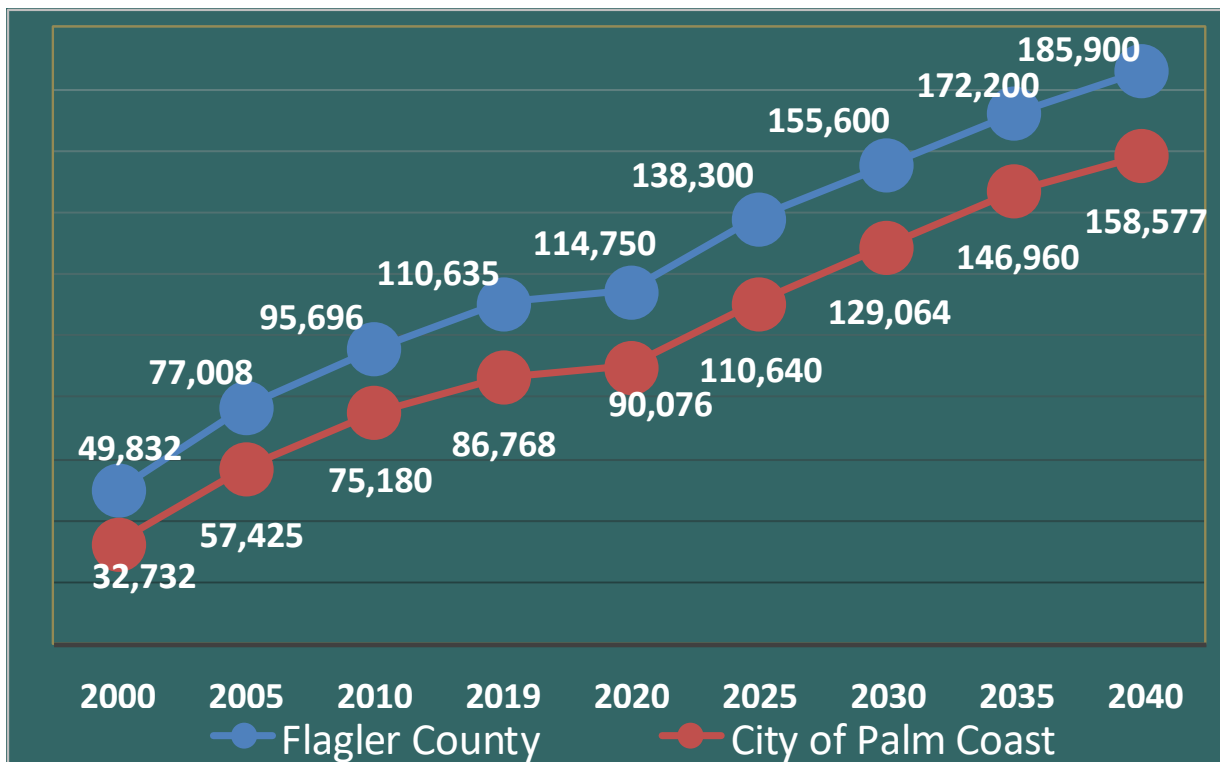
	2018	2020*	2025**	2030**	2035**	2040**
County Population Projection*	110,635	114,750	138,300	155,600	172,200	185,900
City Population Projection***	84,575	90,076	110,640	129,064	146,960	158,577
City Growth Rate	---	6.50%	22.83%	16.65%	13.87%	7.90%

*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 904 dwelling units were issued a CO, this total is a 26% increase from 2018. This included a continuing increase in the number of attached single family units.

FIGURE 2.1 – RESIDENTIAL CONSTRUCTION COMPLETED TABLE (2015–2019)

	2015	2016	2017	2018	2019
Single-Family Detached Dwelling Units	345	356	555	623	736
Single-Family Attached Dwelling Units (Townhome/Duplex)	12	6	16	96	168
Multi-Family Dwelling Units	61	0	0	0	0
Total Dwelling Units	418	362	571	719	904

FIGURE 2.2 – RESIDENTIAL CONSTRUCTION COMPLETED CHART (2015–2019)

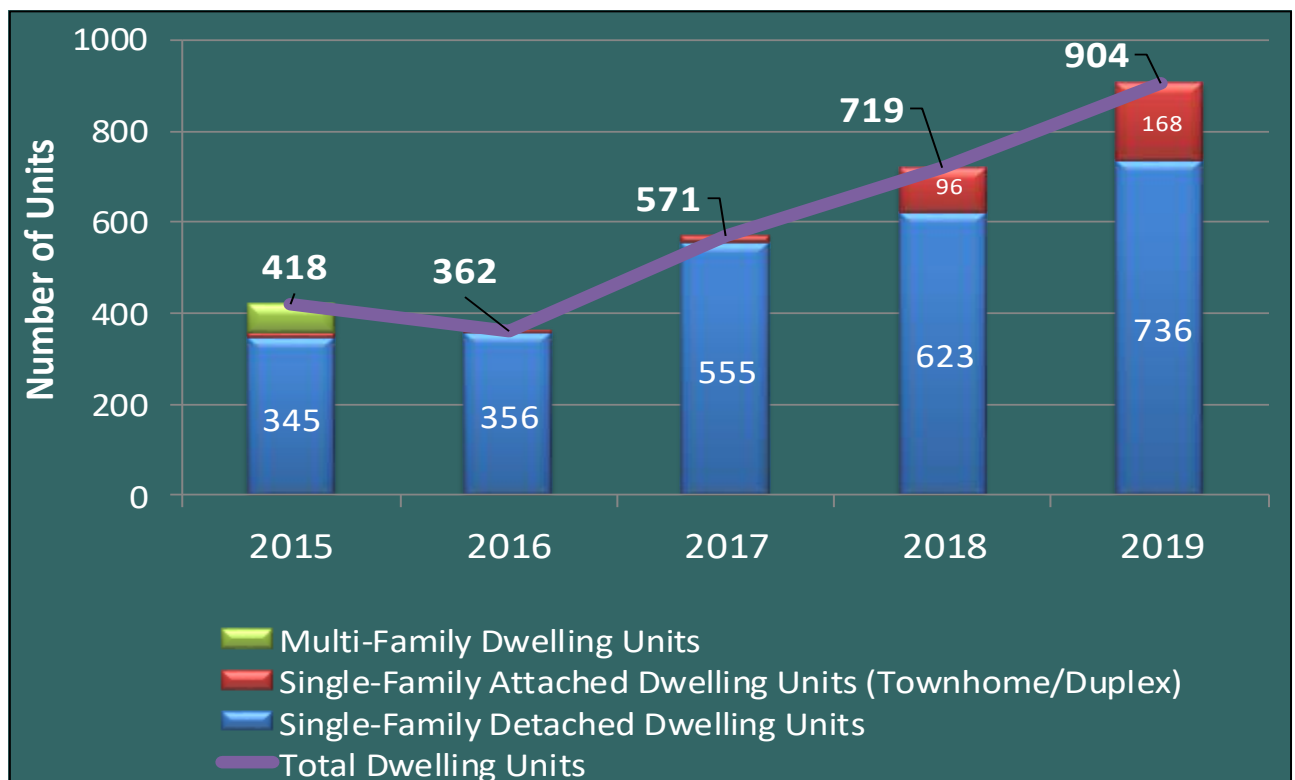
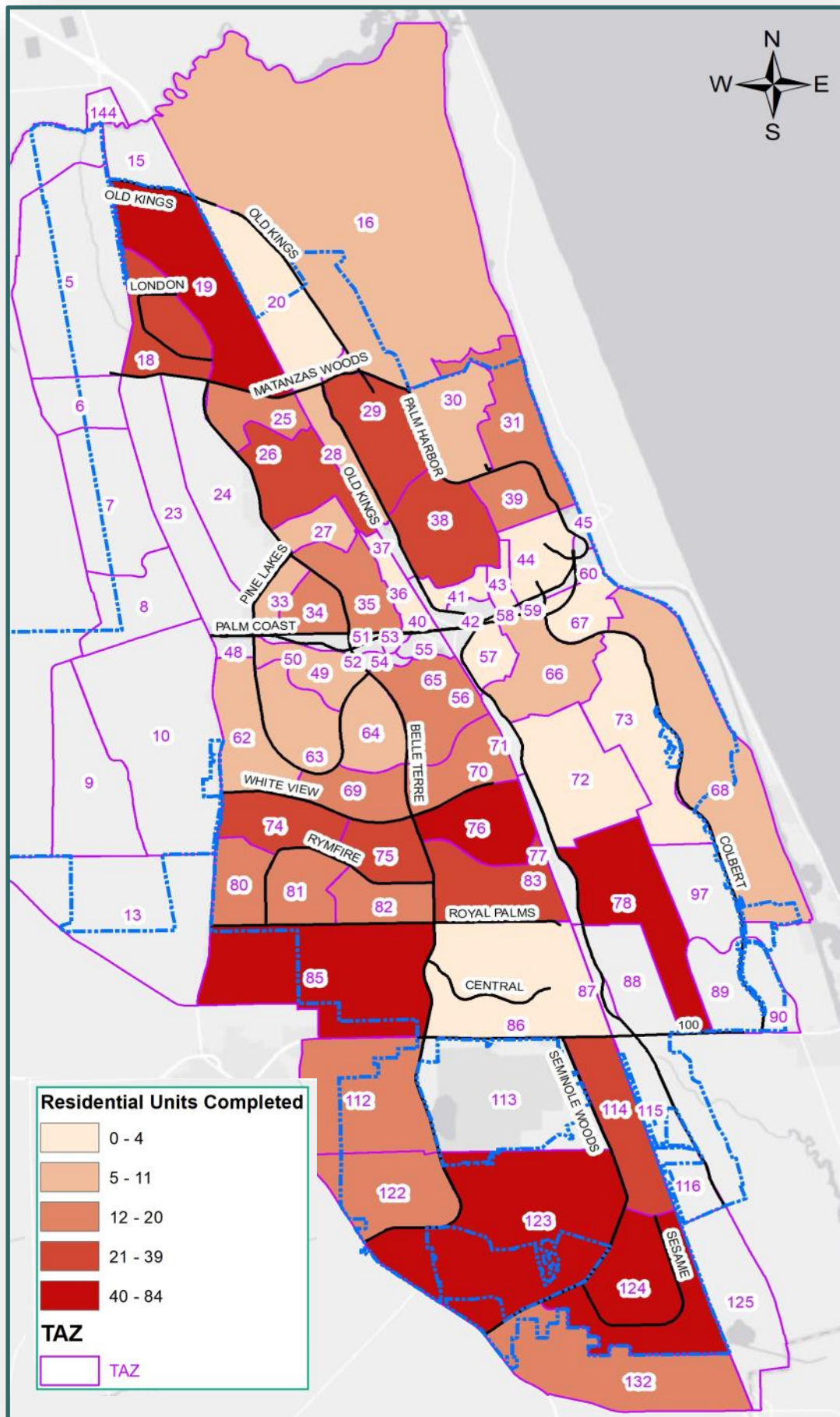


FIGURE 2.3 — RESIDENTIAL CONSTRUCTION COMPLETED MAP (2019)



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 810 single-family detached dwelling units and 166 single-family attached dwelling units were issued a building permit along with permits for 321 multi-family units. Overall, the number of permits issued increased by over 50% from 2018.

FIGURE 2.4 – RESIDENTIAL BUILDING PERMITS ISSUED TABLE (2015–2019)

	2015	2016	2017	2018	2019
Single-Family Detached Dwelling Units	355	538	630	715	810
Single-Family Attached Dwelling Units (Townhomes/Duplex)	0	12	64	166	196
Multi-Family Dwelling Units	24	0	0	0	321
Total Dwelling Units	379	550	694	881	1327

FIGURE 2.5 – RESIDENTIAL BUILDING PERMITS ISSUED CHART (2015–2019)

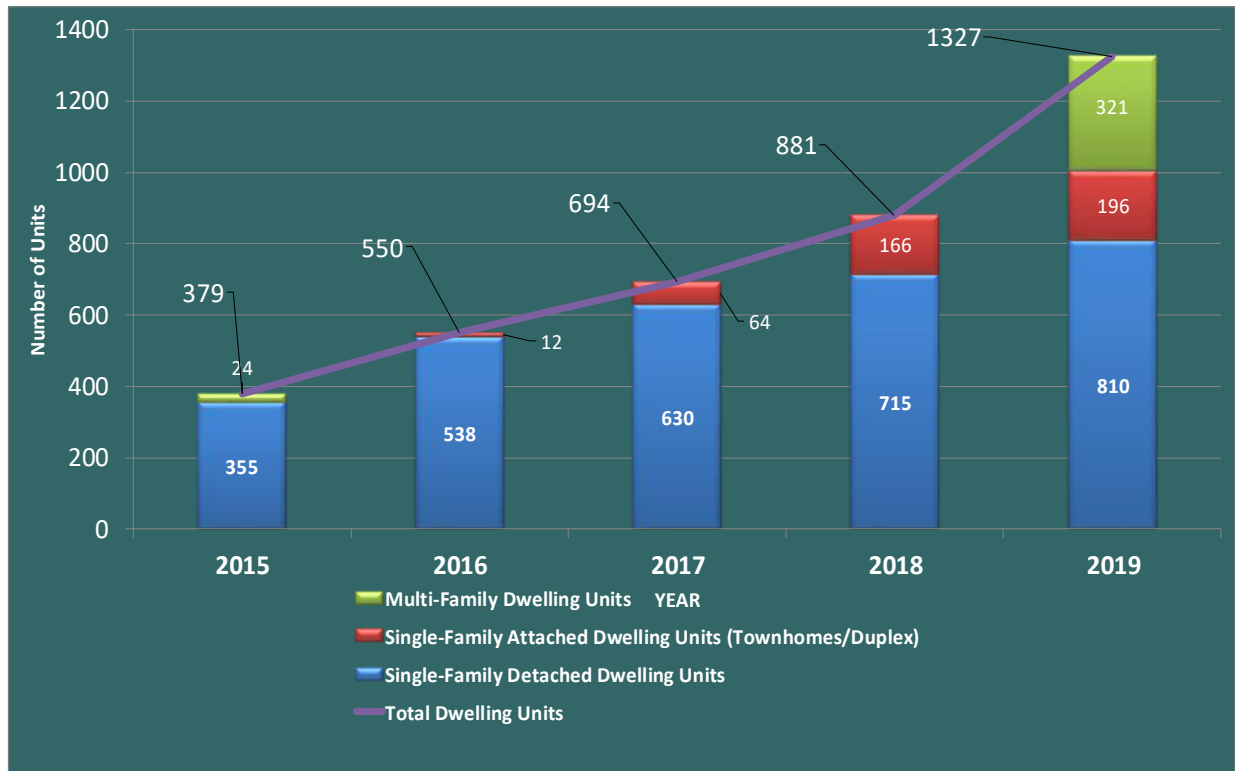
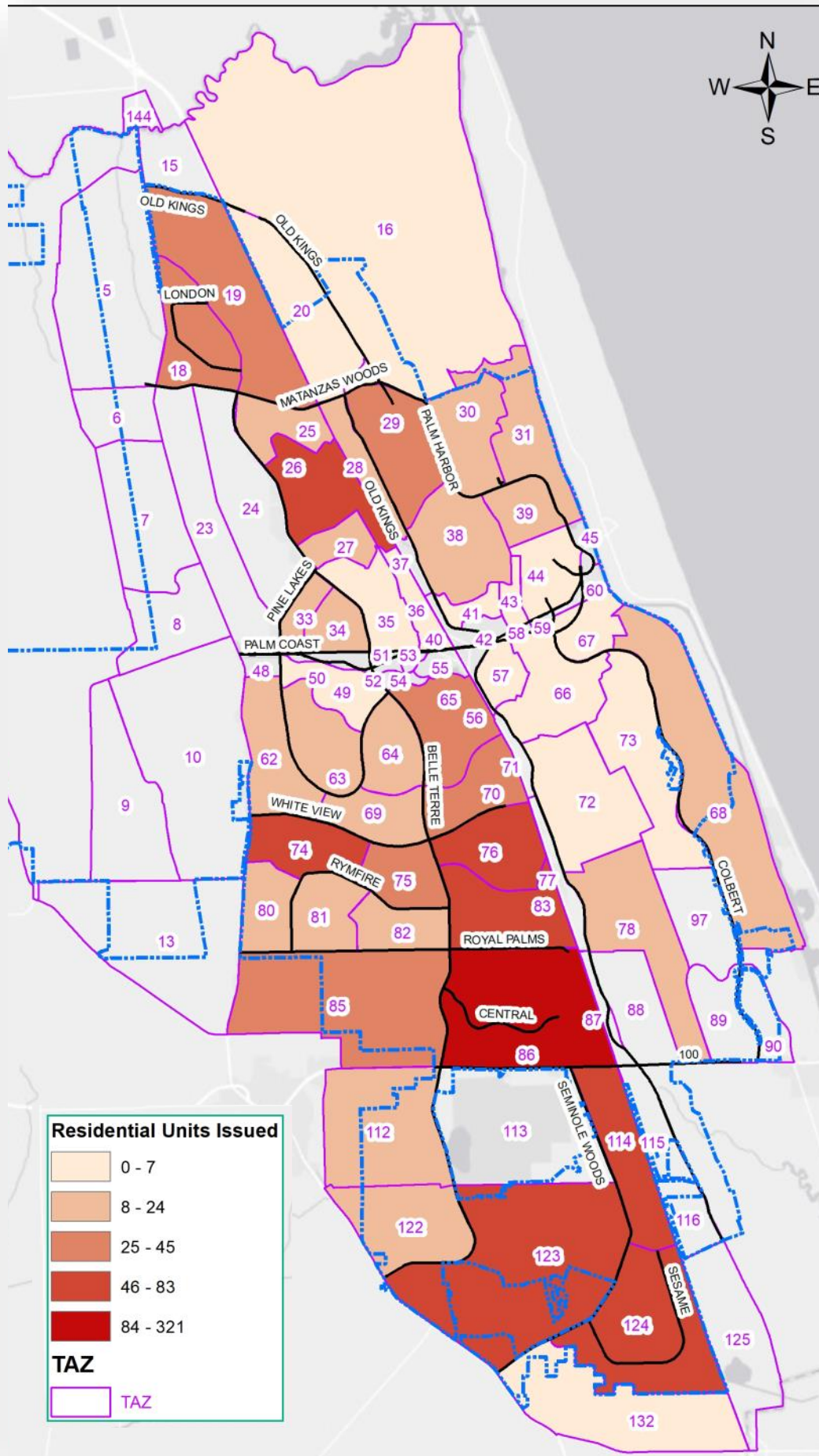


FIGURE 2.6 – RESIDENTIAL BUILDING PERMITS ISSUED MAP (2019)



DEVELOPMENT APPROVED

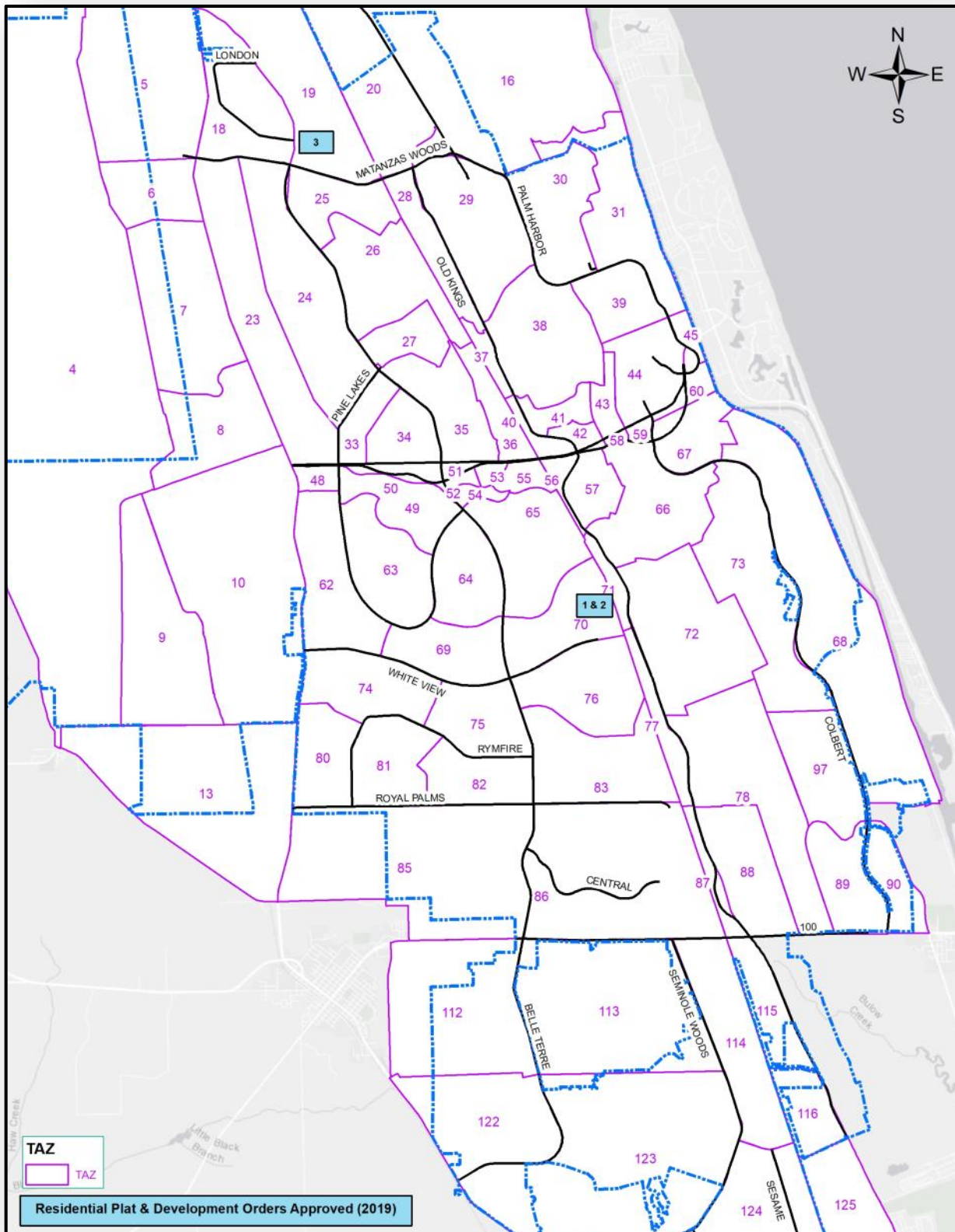
The Planning Division of the Community Development Department issues development orders for residential projects. Development orders allow an applicant to apply for a building permit to construct the residential project and may predict future growth in the short term (1–5 Years), depending on a variety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

In 2019, the following Plat and Development Orders were Approved for residential development.

FIGURE 2.7 – RESIDENTIAL PLAT AND DEVELOPMENT ORDERS APPROVED (2019)

Map ID #	Project Name	TAZ	# of Units	Description
1	American Village	70	45	Final Plat
2	American Village	70	32	Final Plat
3	Matanzas Lakes	19	106	Final Plat
	Summary of Residential Units Approved in 2019	183 dwelling units		

FIGURE 2.8 — RESIDENTIAL PLAT AND DEVELOPMENT ORDERS APPROVED MAP (2019)



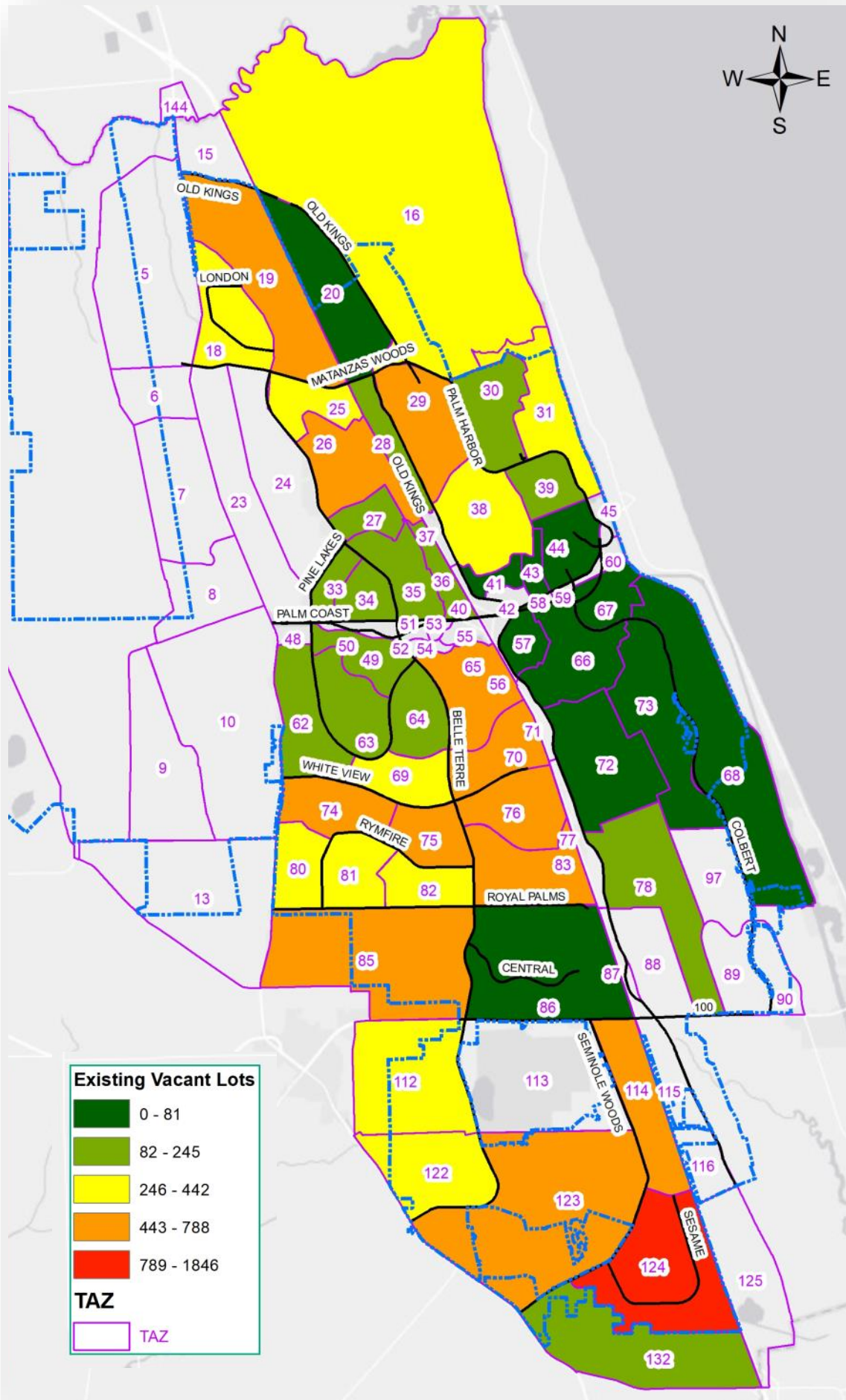
EXISTING VACANT LOTS

The City maintains a database of existing vacant lots for use by its various departments. At the end of 2019, the City contained approximately 15,841 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 (2019)

TAZ	Total Lots	Occupied Lots	Vacant Lots	Percentage Vacant
16	354	59	295	83.33%
18	1040	640	400	38.46%
19	1513	837	676	44.68%
20	22	1	21	95.45%
25	859	569	290	33.76%
26	2029	1,391	638	31.44%
27	774	581	193	24.94%
28	236	119	117	49.58%
29	1875	1,213	662	35.31%
30	1033	824	209	20.23%
31	1449	1,185	264	18.22%
33	601	455	146	24.29%
34	786	618	168	21.37%
35	1309	1,082	227	17.34%
36	467	308	159	34.05%
38	2309	1,889	420	18.19%
39	959	842	117	12.20%
41	362	356	6	1.66%
43	321	302	19	5.92%
44	967	957	10	1.03%
49	977	831	146	14.94%
57	424	420	4	0.94%
62	1172	927	245	20.90%
63	1493	1,303	190	12.73%
64	1177	982	195	16.57%
65	1694	1,191	503	29.69%
66	577	525	52	9.01%
67	33	30	3	9.09%
68	2320	2,239	81	3.49%
69	1291	859	432	33.46%
70	1543	974	569	36.88%
72	78	3	75	96.15%
73	183	165	18	9.84%
74	1708	1,133	575	33.67%
75	1445	945	500	34.60%
76	2018	1,230	788	39.05%
78	503	343	160	31.81%
80	888	558	330	37.16%
81	1117	718	399	35.72%
82	1242	800	442	35.59%
83	1752	995	757	43.21%
85	2511	1,989	522	20.79%
86	9	9	0	0.00%
112	730	463	267	36.58%
114	1301	550	751	57.72%
122	738	448	290	39.30%
123	1202	682	520	43.26%
124	3156	1,310	1846	58.49%
132	486	342	144	29.63%
TOTAL	53,033	37,192	15,841	29.87%

FIGURE 2.10 — EXISTING VACANT RESIDENTIAL LOTS MAP (2019)



SECTION 3: NON-RESIDENTIAL DEVELOPMENT

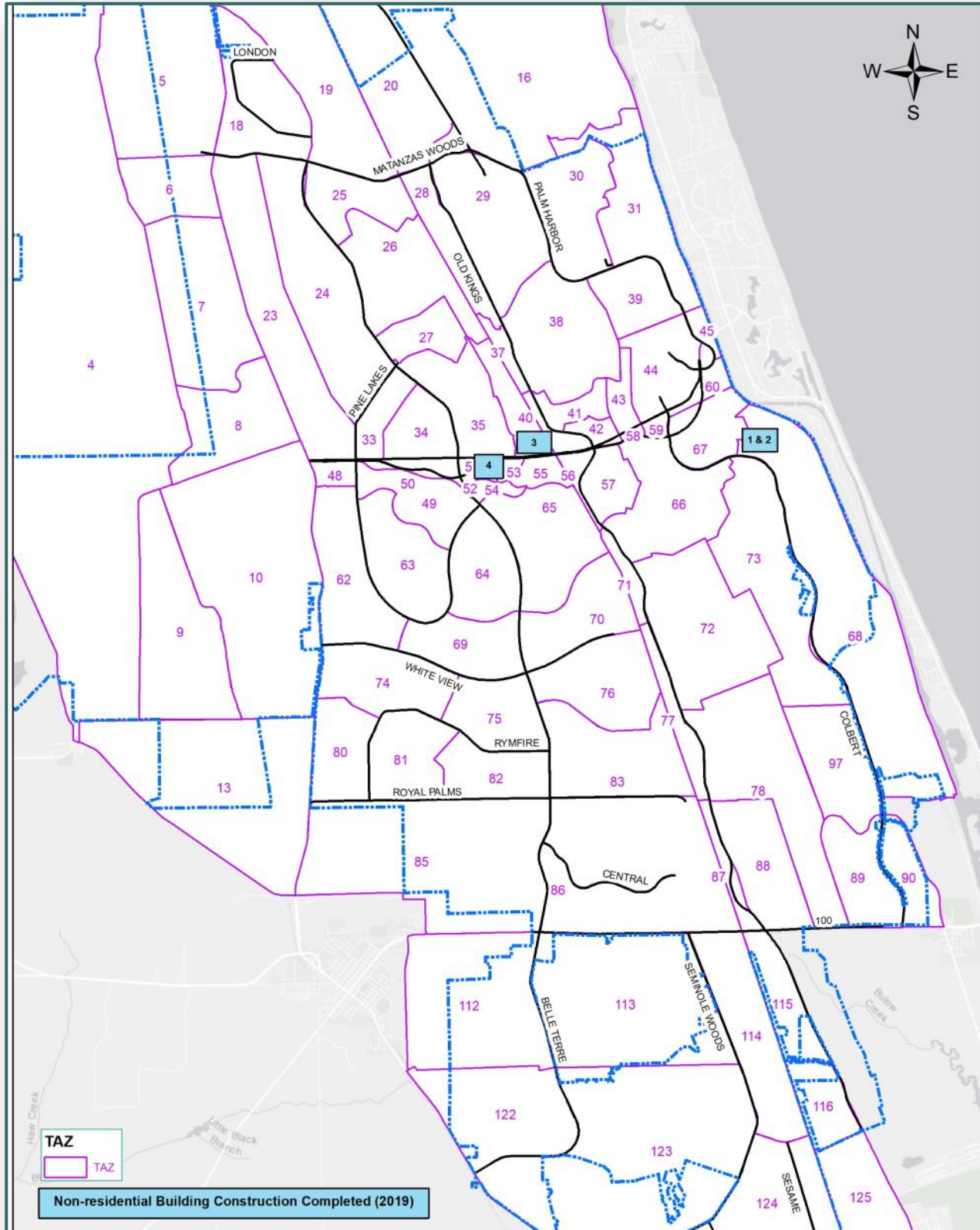
CONSTRUCTION COMPLETED

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 22,091 sq. ft. of non-residential space. The total for 2019 is a decrease from the previous year’s total of 256,411 square feet. This year’s non-residential projects is highlighted by the completion of over 5,000 sq. ft. of office space and a new restaurant.

FIGURE 3.1 – NON-RESIDENTIAL CONSTRUCTION COMPLETED TABLE (2019)

Map ID #	Project Name	TAZ	Sq. Ft.	Description
1	Creekside Commercial	68	3,311	Office Building #2
2	Creekside Commercial	68	2,000	Office Building #1
3	Discount Tire	36	9,617	Retail (Tire store)
4	Texas Roadhouse	51	7,163	Restaurant
	Summary of Non-Residential Building Construction Completed in 2019		22,091	Sq. Ft. of non-residential

FIGURE 3.2 — NON-RESIDENTIAL CONSTRUCTION COMPLETED (2019)



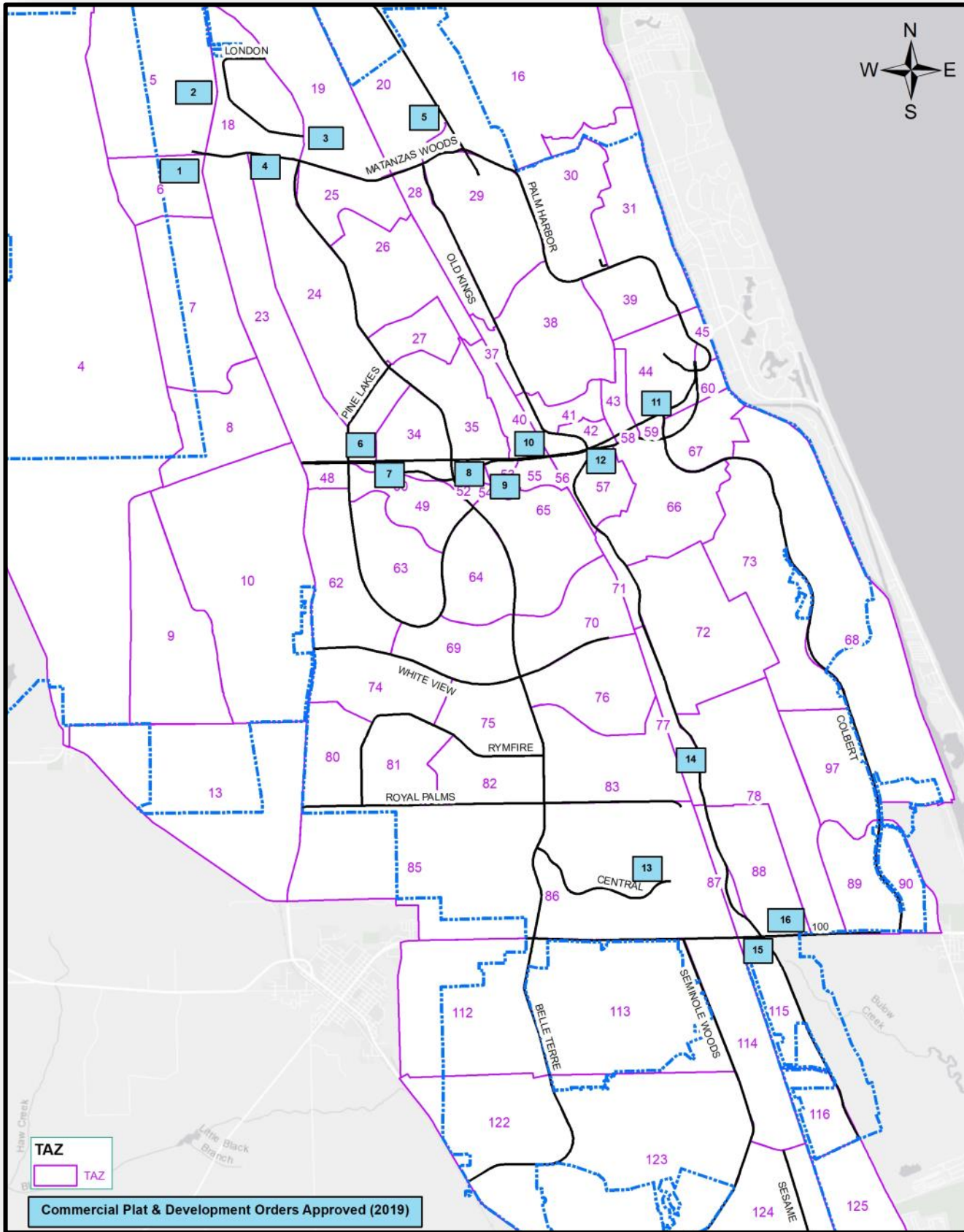
DEVELOPMENT APPROVED

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 2019, development orders totaled 257,985 sq. ft. of non-residential uses, this is a significant increase from 2018 total of 14,185 sq. ft.

FIGURE 3.3 – NON-RESIDENTIAL DEVELOPMENT APPROVED TABLE (2019)

Map ID #	Project Name	TAZ	Sq. Ft.	Description
1	PC Park Tract 18 & 20-Lot 4-Parcel 3	6	4,250	Convenience Store/Gas Station
1	PC Park Tract 18 & 20-Lot 4-Parcel 4	6	--	Plat for 4 Commercial Lots
2	Sawmill Amenity Center	5	1,856	Recreation Center for Sawmill Creek
3	Matanzas Amenity Center	19	1,500	Amenity Center
4	Dollar General	25	10,640	Retail
5	Storquest	20	57,006	895 sq. ft. of Office & 56408 sq. ft. of self storage with 78,668 sq. ft. of RV parking
6	Pine Lakes Animal Hospital	33	6,905	Animal Hospital
7	O'Reilly	50	7,171	Retail (Auto Parts)
8	Texas Roadhouse	51	7,163	Restaurant
9	The Azure	54	94,620	Assisted Living Facility
10	Salvagio Building Addition	35	17,467	Retail/Office
11	Coastal Rehabilitation	44	2,992	Professional Office
12	Little Smiles	56	4,996	Professional Office
13	Central Landings @ Town Center Amenity Center	86	2,637	Amenity Center for Apartment
14	Gold Choice/OKR Professional Centre	77	34,287	Assisted Living Facility & Professional Office
15	Flagler Animal Hospital Expansion	115	1,992	Professional Office
16	Popeyes	88	2,503	Restaurant
	Summary of Non-Residential Development Approved in 2019		257,985	Sq. Ft. of Non Residential

FIGURE 3.4 — NON-RESIDENTIAL DEVELOPMENT APPROVED MAP (2019)



SECTION 3

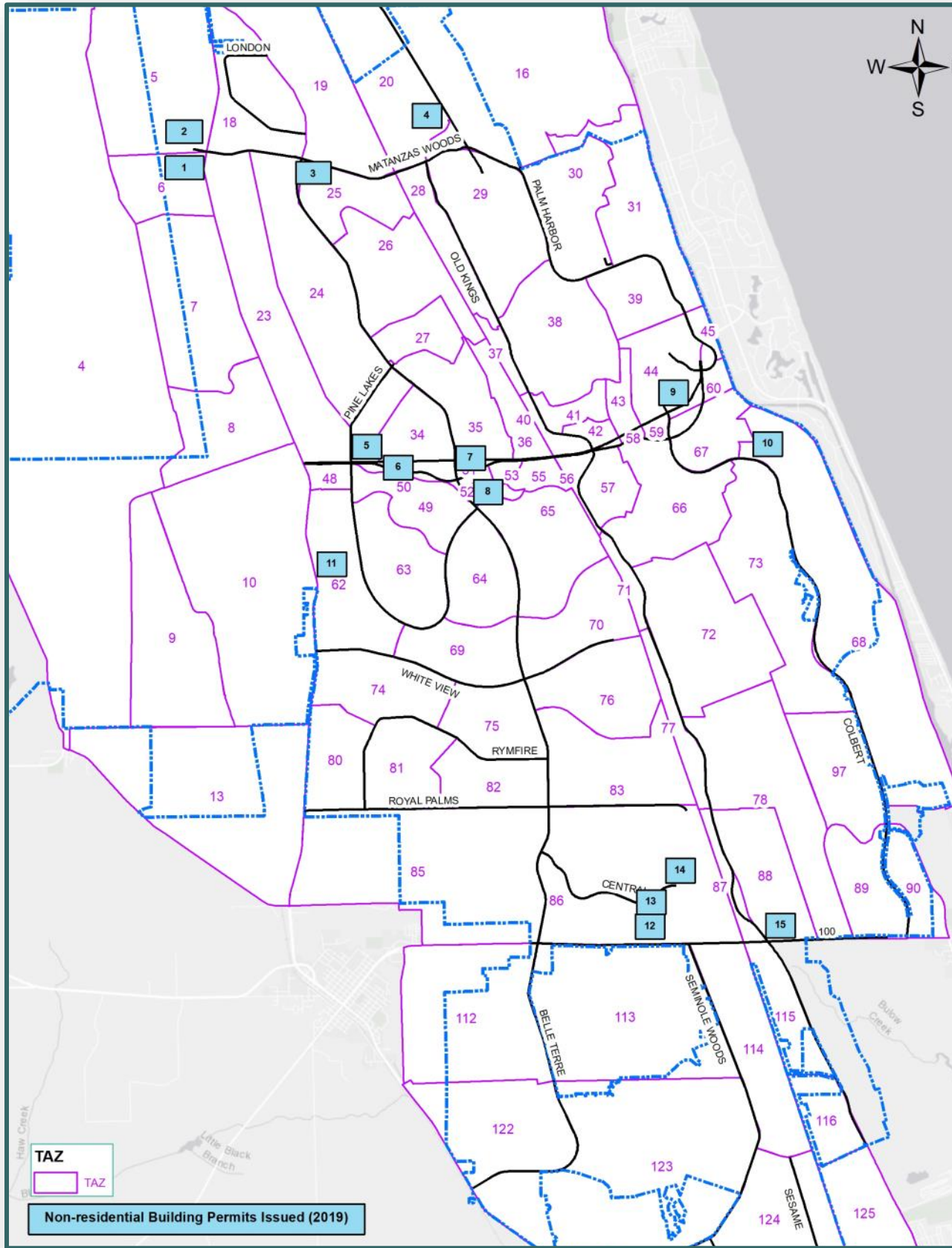
BUILDING PERMITS ISSUED

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 232,868 square feet of non-residential space, this amount is a significant increase over last year's total (2018) of 48,528.

FIGURE 3.5 – NON-RESIDENTIAL BUILDING PERMITS ISSUED TABLE (2019)

Map ID #	Project Name	TAZ	Sq. Ft.	Description
1	Convenience Store (PC Park)	6	4,250	Convenience Store/Gas Station
2	Sawmill Amenity Center	5	1,856	Recreation Center for Sawmill Creek
3	Dollar General	25	10,640	Retail
4	Storquest	20	57,006	895 sq. ft. of Office & 56408 sq. ft. of self storage with 78,668 sq. ft. of RV parking
5	Pine Lakes Animal Hospital	33	6,905	Animal Hospital
6	O'Reilly	50	7,363	Retail (Auto Parts)
7	Texas Roadhouse	51	7,163	Restaurant
8	The Azure	54	94,620	Assisted Living Facility
9	Coastal Rehabilitation	44	2,992	Professional Office
10	Creekside Commercial	68	2,000	Office Building #1
11	The Alamo Phase 2	62	22,200	15000 sq. ft. of office & 7200 sq. ft. of self-storage
12	Wawa (Town Center)	86	6,119	Convenience Store/Gas Station
13	The Palms Amenity Center	86	4,614	Amenity Center for Apartment
14	Central Landings @ Town Center Amenity Center	86	2,637	Amenity Center for Apartment
15	Popeyes	88	2,503	Restaurant
	Summary of Non-Residential Building Permits Issued in 2019		232,868	Sq. ft. of non-residential

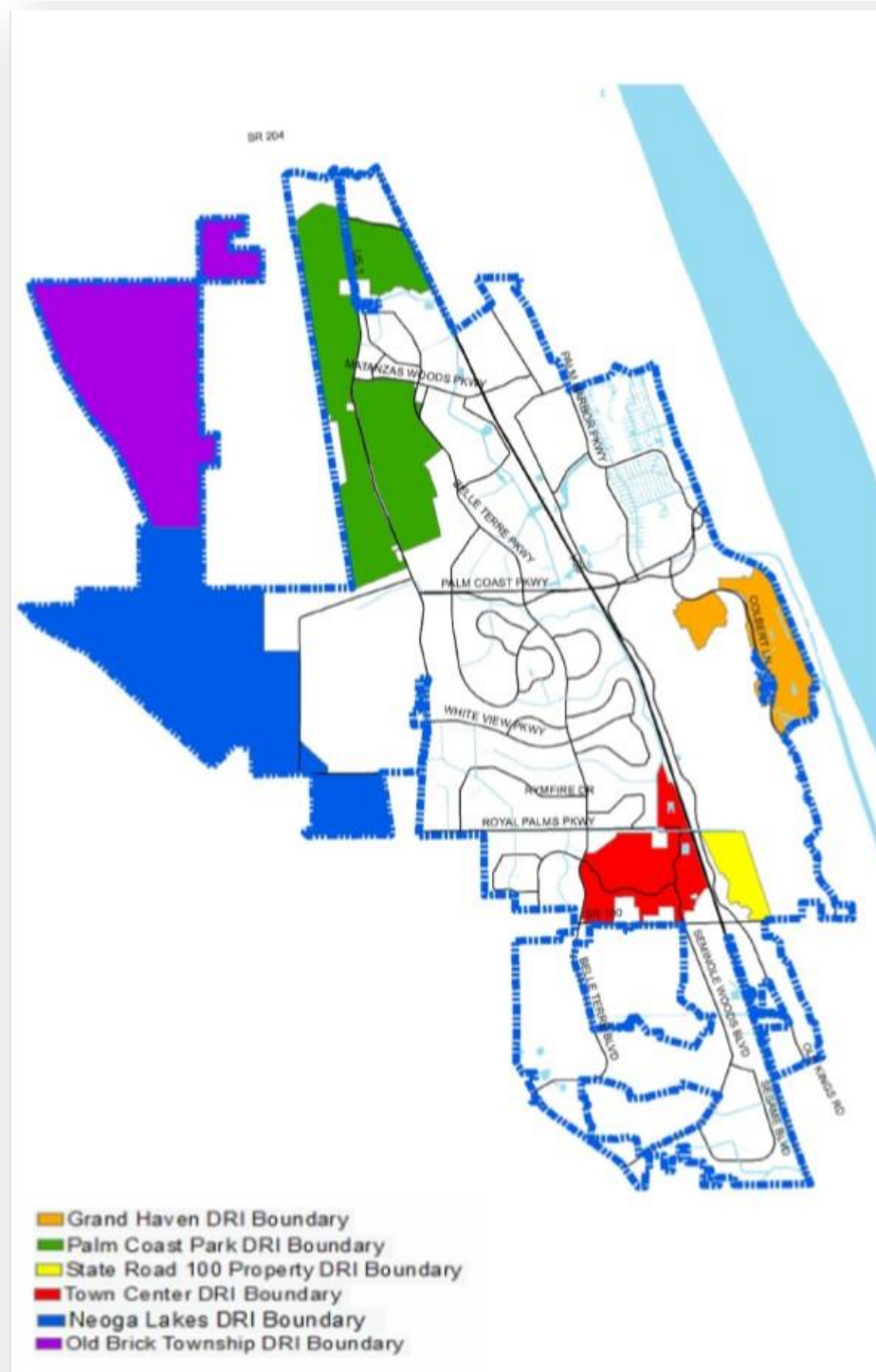
FIGURE 3.6 — NON-RESIDENTIAL BUILDING PERMITS ISSUED MAP (2019)



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.

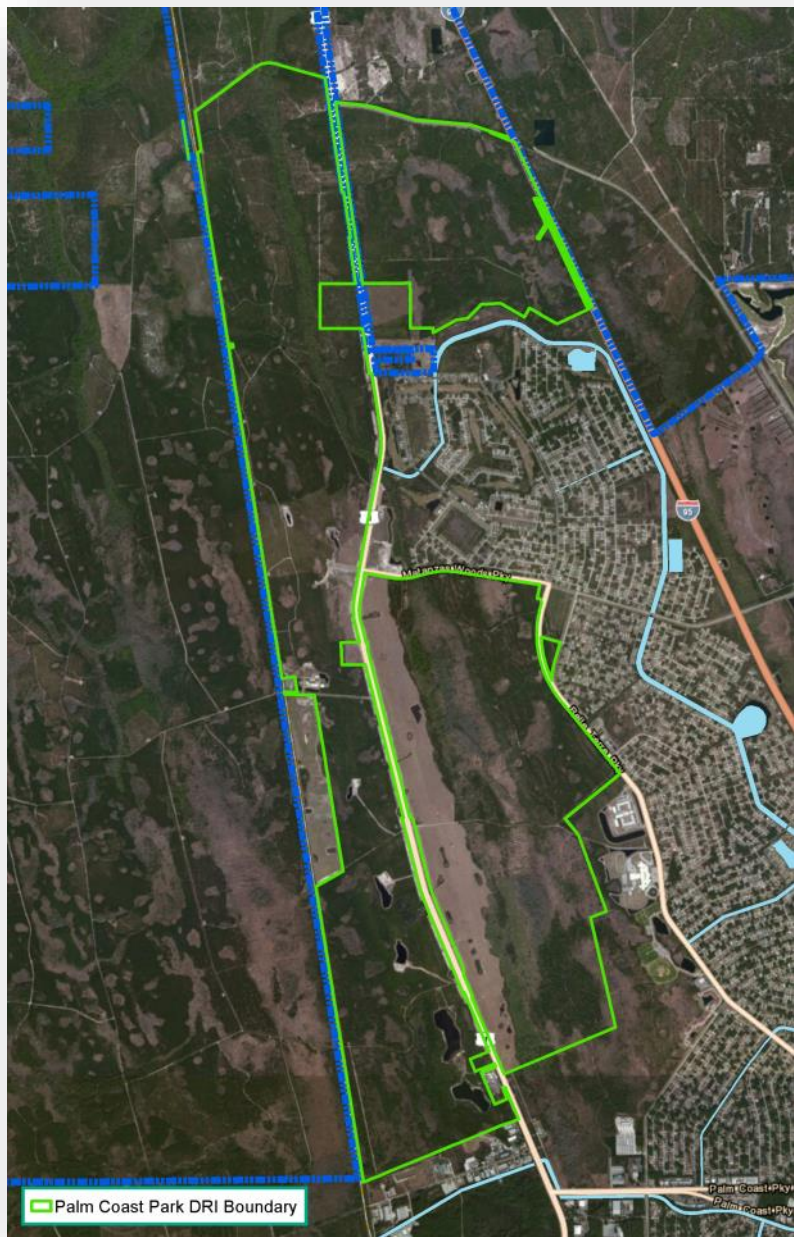
FIGURE 4.1 – MAJOR DEVELOPMENT LOCATION MAP



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

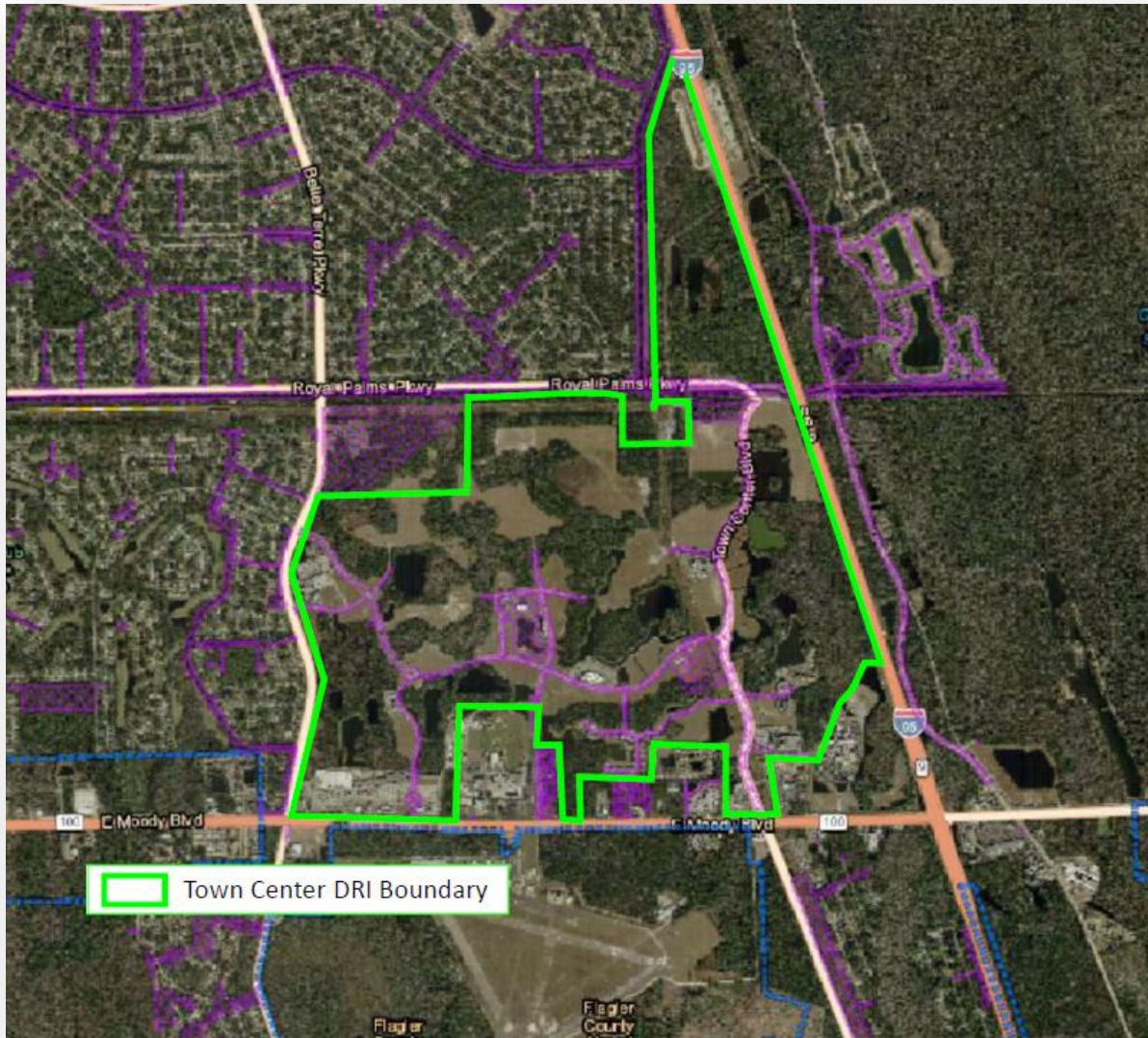


	ENTITLEMENT	DEVELOPMENT APPROVAL	BUILDING PERMITS ISSUED	CONSTRUCTION COMPLETED
RESIDENTIAL (SF)	773 du	-	-	-
RESIDENTIAL (MF)	1,638 du	-	-	-
GENERAL RETAIL	50,000 sf	-	-	-
GENERAL OFFICE	30,000 sf	-	-	-
HOTEL	150 rooms	-	-	-

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

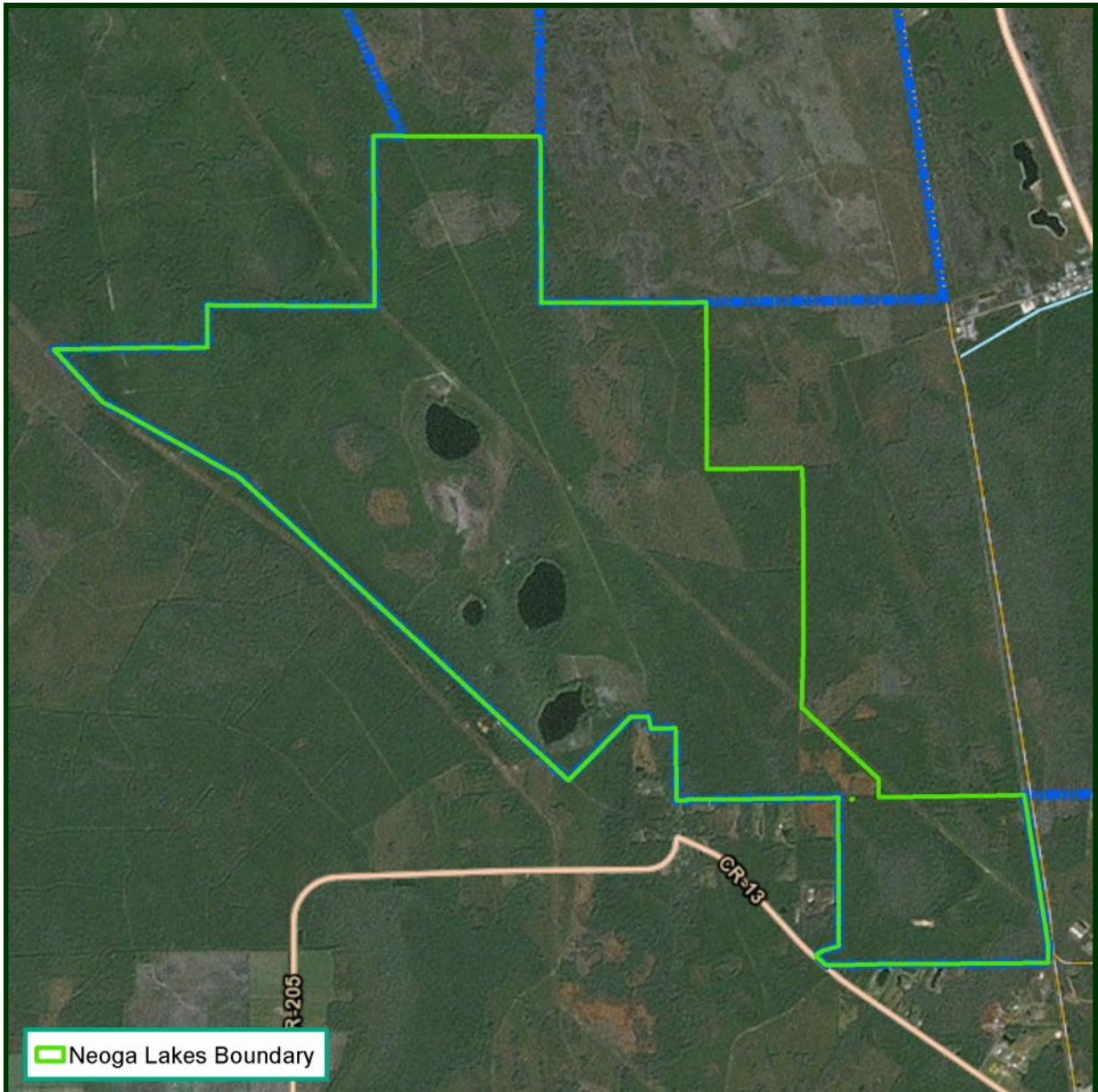


Land Use Category (Totals as of Dec. 31, 2018)	Entitlement	Entitlement Approval	Construction Completed	Entitlement Remaining
Residential	2,500 du	542	219	1,958
Non-Residential	4,800,000 sf	1,760,277	747,499	3,039,723
Movie Theater	2,400 seats	2,400	2,400	
Lodging	480 rooms	407	327	73
Nursing Home	240 beds	84	84	156

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

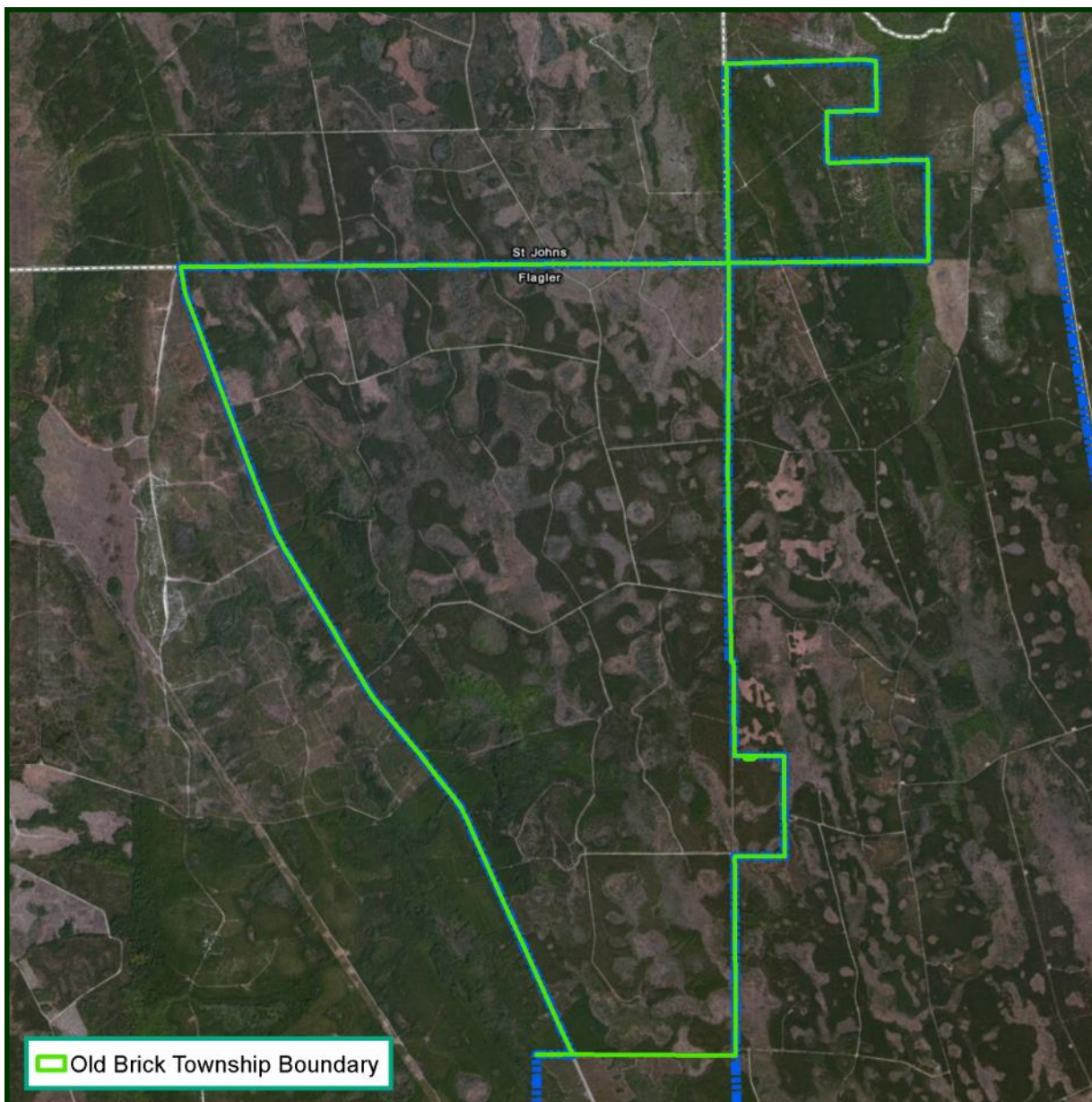


	ENTITLEMENT	DEVELOPMENT APPROVAL	BUILDING PERMITS ISSUED	CONSTRUCTION COMPLETED
RESIDENTIAL	7,000 du	-	-	-
RETAIL USES	354,000 sf	-	-	-
OFFICE USES	45,000 sf	-	-	-
CIVIC USES	222,000 sf	-	-	-
EMPLOYMENT CENTER	1,870,000 sf	-	-	-

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 areas in 2019. The first parcel is a development known as Lighthouse Harbor, the FLUM/MPD Amendment entitled 663 residential units. A second parcel on State Road 100 is for a development known as Ocean Village. This project on 50+/- acres entitled 416 residential units. Finally, the City processed an amendment to the Tuscan Reserve MPD to add an additional 8 residential units. This brought the total development of Tuscan Reserve to 123 units.

CONVERSION OF RESIDENTIAL UNITS

The City did not review any conversions or redevelopment of residential units in 2019.

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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