



## 2016 ANNUAL REPORT



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

COMMUNITY DEVELOPMENT DEPARTMENT

# 2016 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 2000 and demographics from the 5-year American Community Survey (ACS) (2011-2015) 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 47.6. 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 (2011-2015)	National 5-Year American Community Survey (2011-2015)
% of Population Under 18 Years	18.50%	20.2%	23.3%
% of Population 65 Years and over	30.20%	26.5%	14.1%
Median Age	51.2	47.6	37.6
Average Household Size	2.38	2.81	2.64
Median Household Income	\$41,570	\$48,369	\$53,889
Per Capita Income	\$21,490	\$22,612	\$28,930
Families Below Poverty Level	5.60%	9.70%	11.30%
Household Units	14,929	28,169	116,926,305
Tenure of All Occupied Housing Units (Owner Occupied)	85.9%	77.0%	63.9%

## 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 6.2% between 2012 and 2016.

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

	2012	2013	2014	2015	2016
Population	76,450	77,068	78,046	79,821	81,184
Growth Rate	1.10%	0.81%	1.27%	2.27%	1.71%

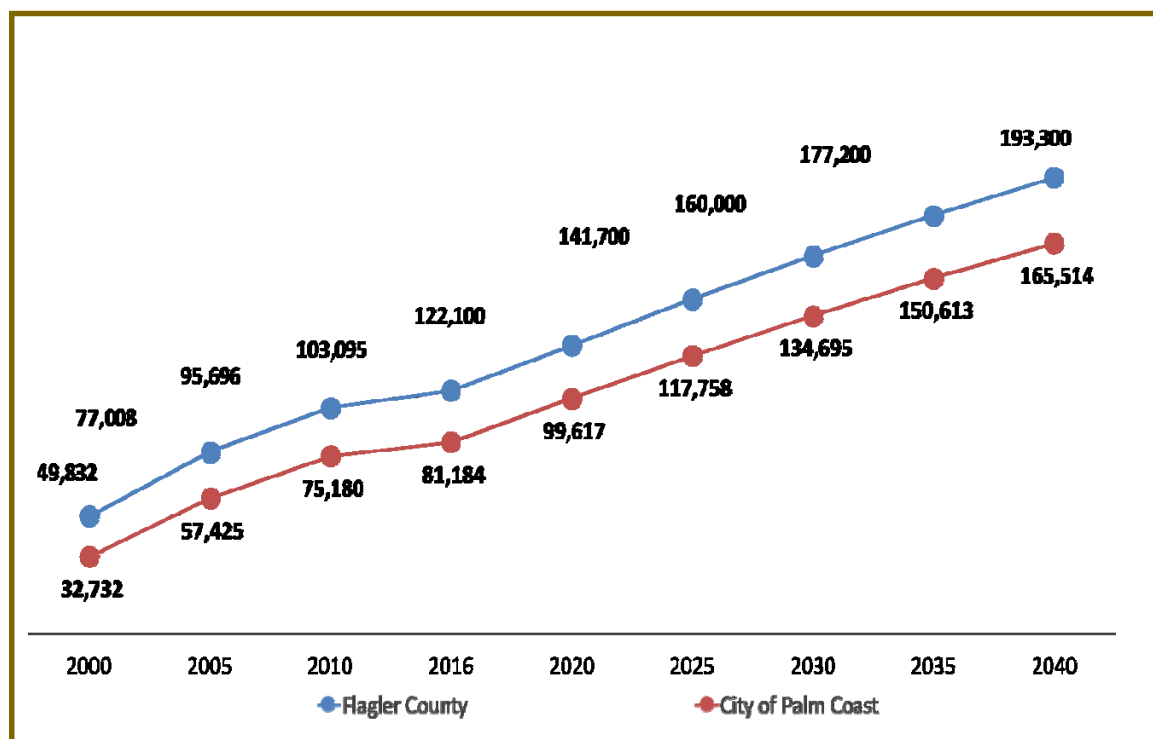
### RATES TABLE

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

	2016	2020	2025	2030	2035	2040
County Population Projection	103,095	122,100	141,700	160,000	177,200	193,300
City Population Projection	81,184	99,617	117,758	134,695	150,613	165,514
City Growth Rate	---	22.71%	18.21%	14.38%	11.82%	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 362 dwelling units were issued a CO, this total is a slight decrease from 2015. However, the number of single-family detached dwelling units increased from the previous year.

FIGURE 2.1 — RESIDENTIAL CONSTRUCTION COMPLETED TABLE (2012–2016)

	2012	2013	2014	2015	2016
Single-Family Detached Dwelling Units	97	193	320	345	356
Single-Family Attached Dwelling Units (Townhome/Duplex)	0	0	2	12	6
Multi-Family Dwelling Units	0	0	96	61	0
Total Dwelling Units	97	193	418	418	362

FIGURE 2.2 — RESIDENTIAL CONSTRUCTION COMPLETED CHART (2012–2016)

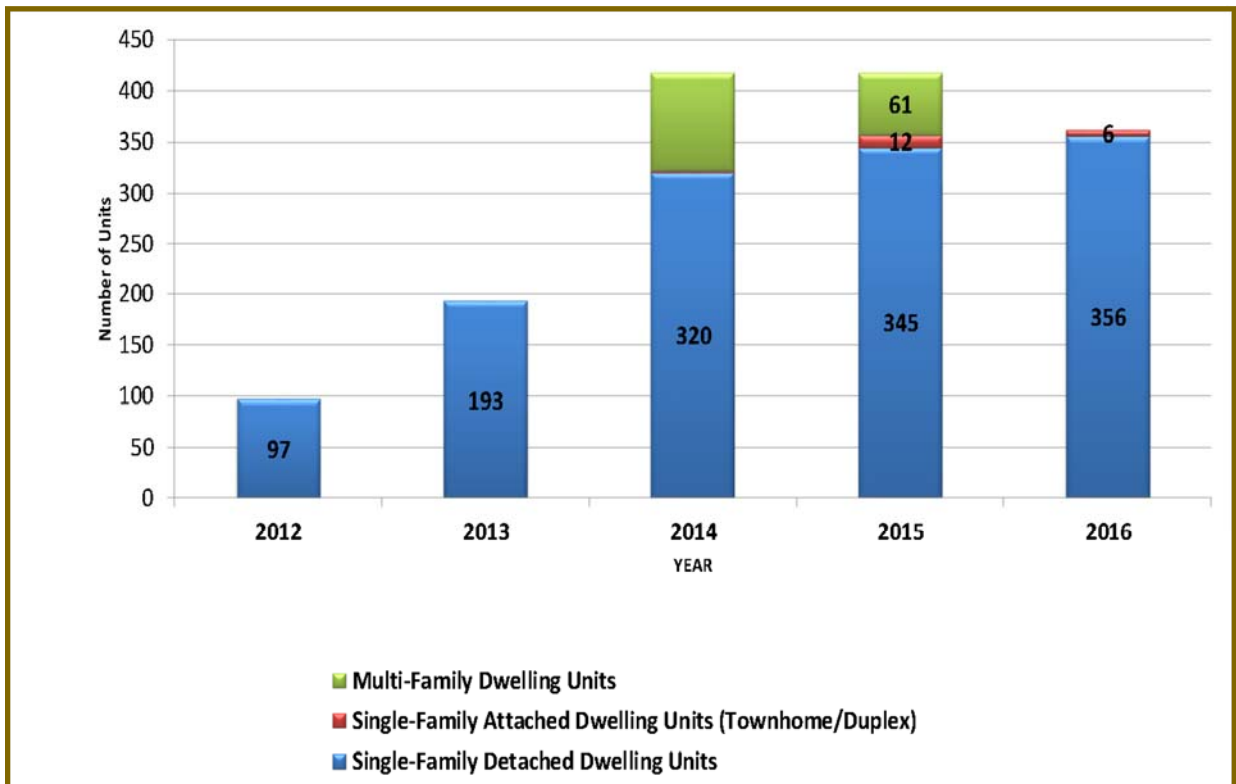
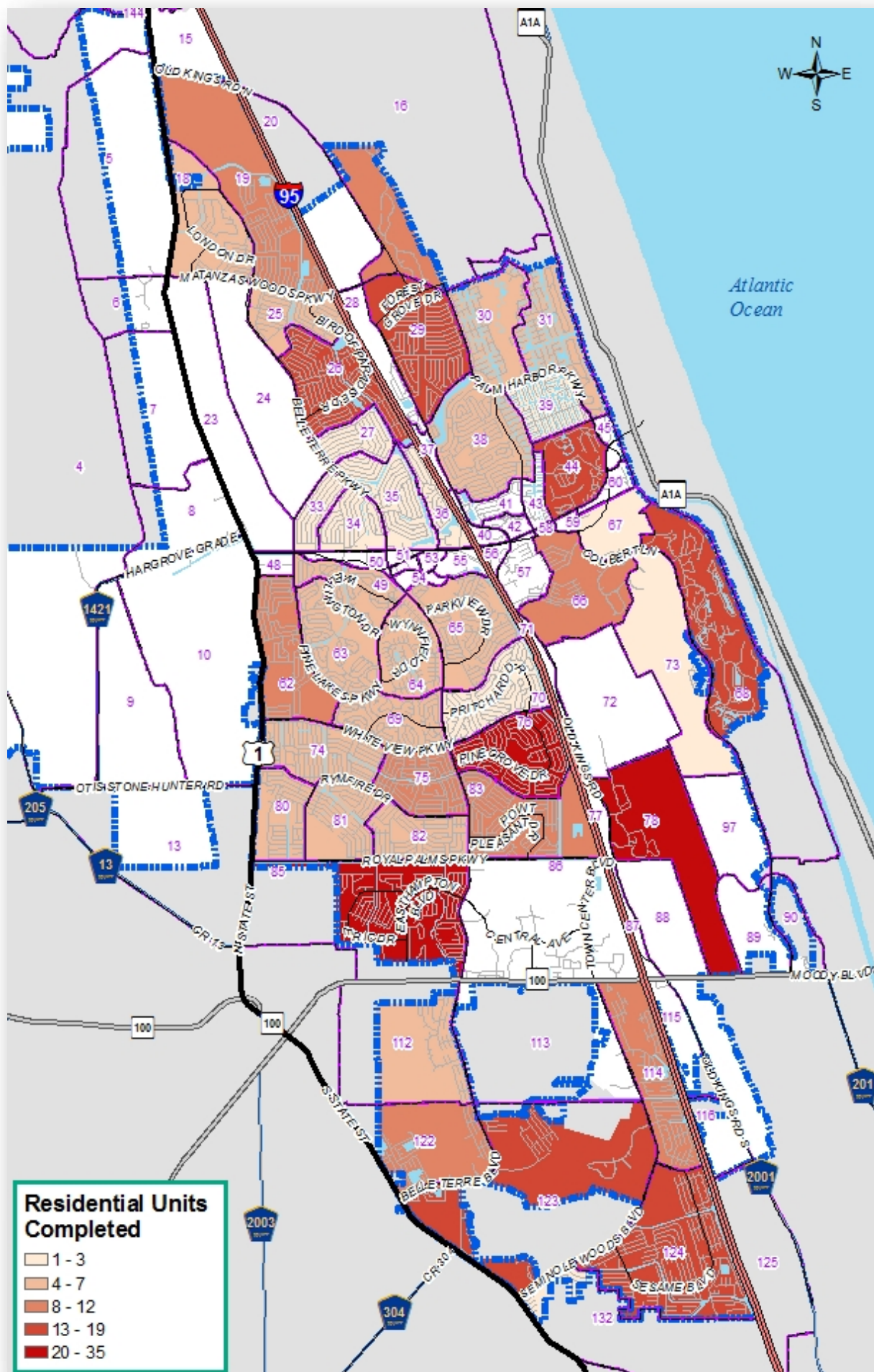




FIGURE 2.3 — RESIDENTIAL CONSTRUCTION COMPLETED MAP (2016)



## 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 538 single-family detached dwelling units were issued a building permit, along with building permits for 12 multi-family dwelling units. Overall, the number of permits issued increased by 45% from 2015.

**FIGURE 2.4 — RESIDENTIAL BUILDING PERMITS ISSUED TABLE (2012–2016)**

	2012	2013	2014	2015	2016
Single-Family Detached Dwelling Units	155	263	339	355	538
Single-Family Attached Dwelling Units (Townhomes/Duplex)	0	2	12	0	12
Multi-Family Dwelling Units	0	116	61	24	0
<b>Total Dwelling Units</b>	<b>155</b>	<b>381</b>	<b>412</b>	<b>379</b>	<b>550</b>

**FIGURE 2.5 — RESIDENTIAL BUILDING PERMITS ISSUED TABLE (2012–2016)**

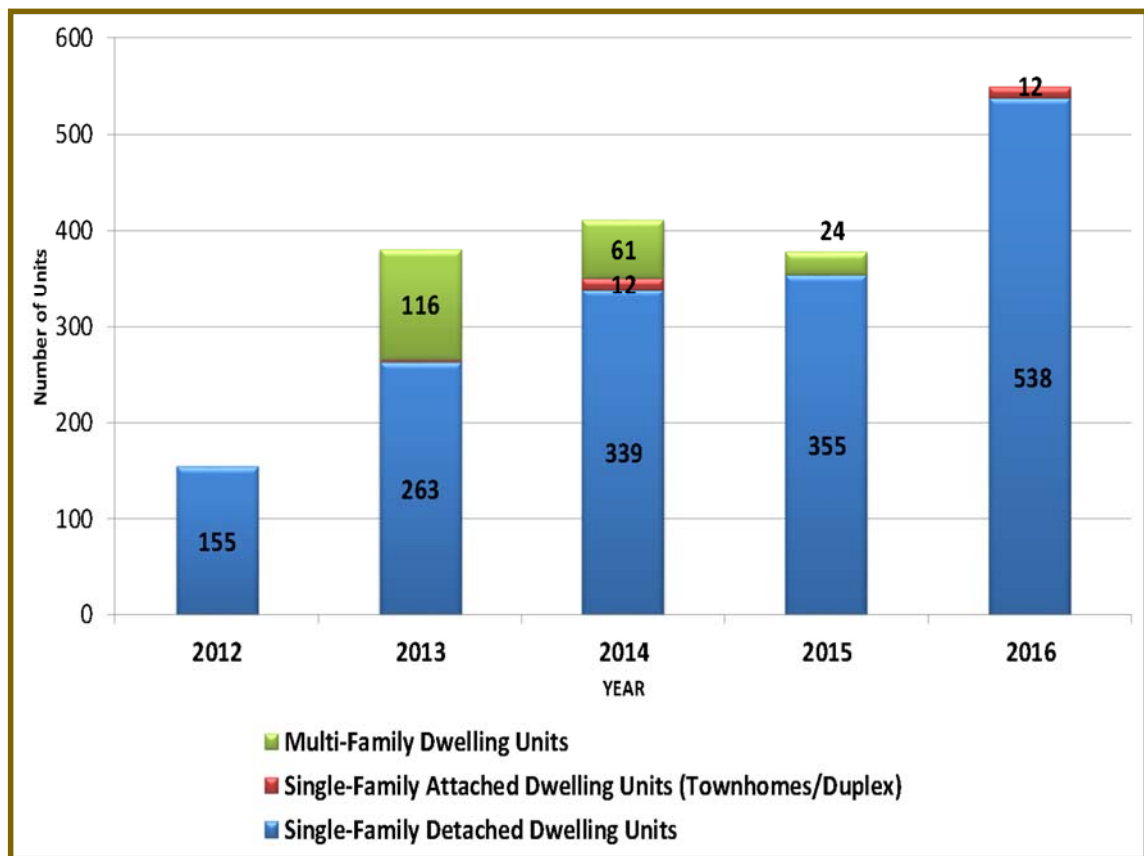
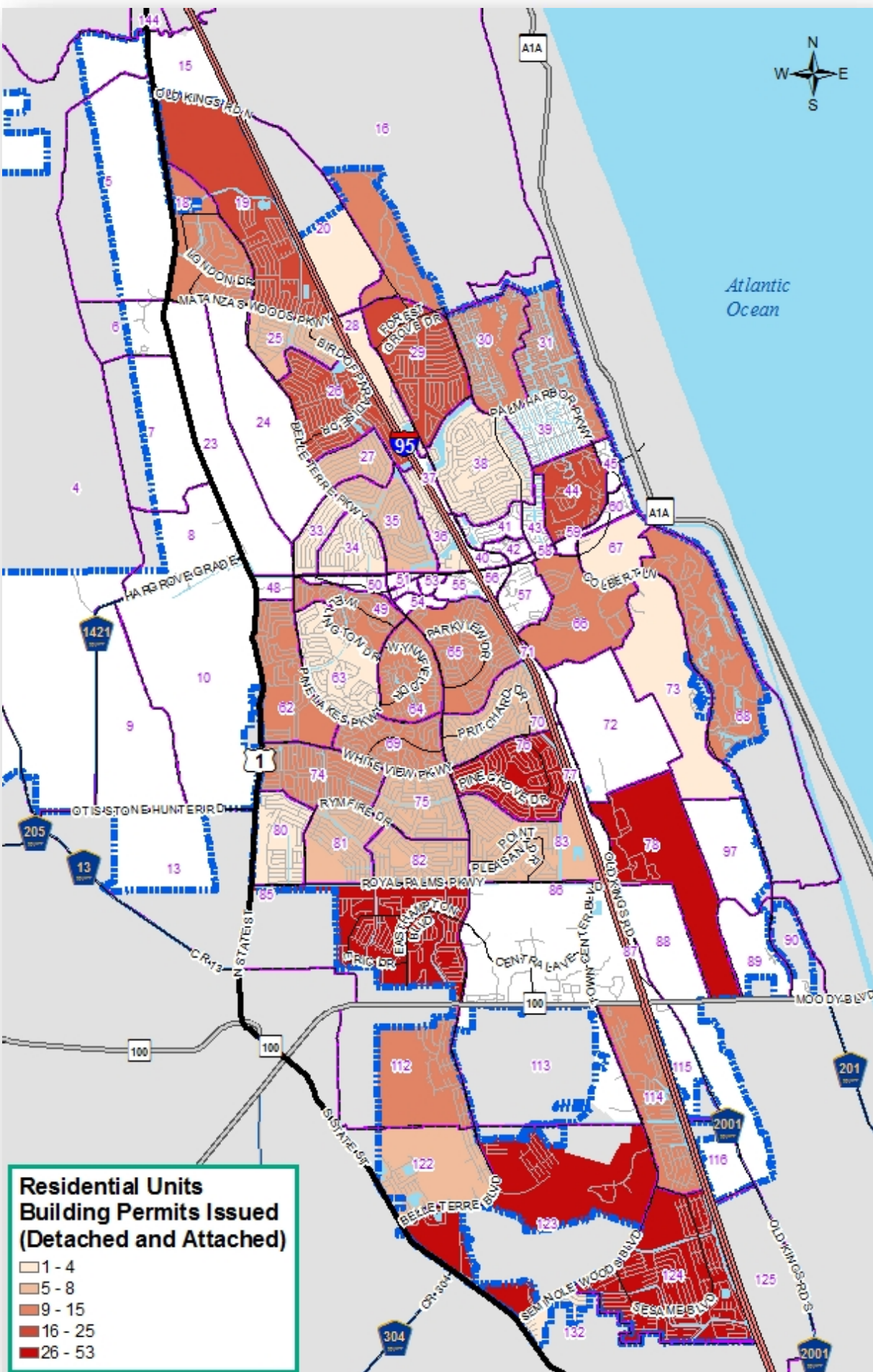




FIGURE 2.6 — RESIDENTIAL BUILDING PERMITS ISSUED MAP (2016)



## 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 2016, the following Plat and Development Orders were Approved.

### Residential Plat and Development Orders Approved

	TAZ	# of Units	Description
Hidden Lakes Phase II	78	89	Final Plat
Grand Landings Phase I	123	11	Final Plat
Grand Landings Phase 2A	123	10	Final Plat
Grand Landings Phase 2B	123	23	Final Plat
Grand Landings Phase 2C	123	41	Final Plat
Summary of Residential Units Approved in 2016		174	Single-family lots

# SECTION 2

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## EXISTING VACANT LOTS

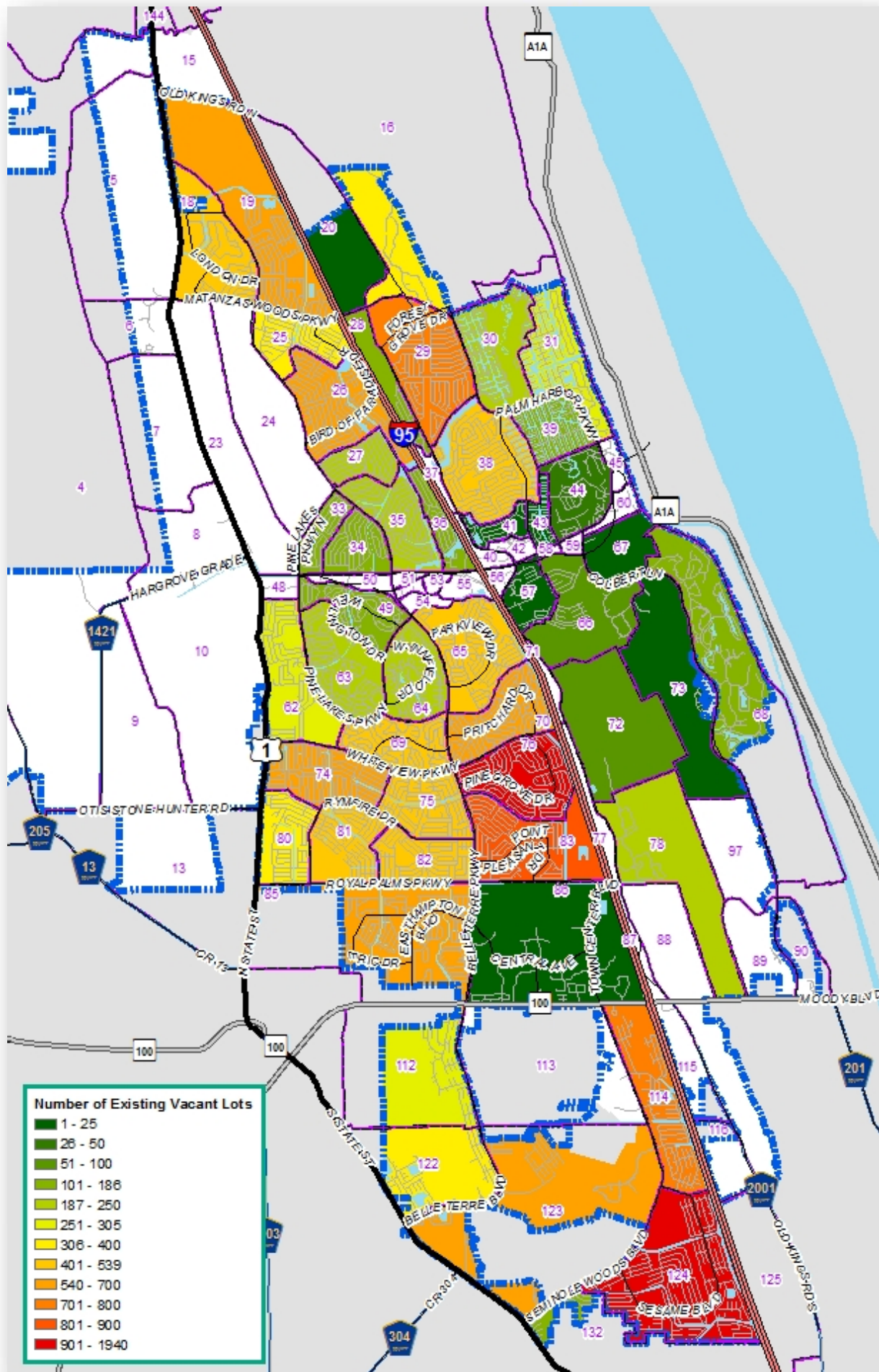
The City maintains a database of existing vacant lots for use by its various departments. At the end of 2016, the City contained approximately 17,116 vacant plated lots. The number of existing vacant lots represents future potential growth in the City over an extended period, possibly up to 20 years.

FIGURE 2.9 — EXISTING VACANT RESIDENTIAL LOTS BY TAZ TABLE (2016)

TAZ	Total Lots	Occupied Lots	Vacant Lots	Percentage Vacant
16	346	32	314	90.75%
18	1,097	649	448	40.84%
19	1,415	772	643	45.44%
20	22	1	21	95.45%
25	865	546	319	36.88%
26	2,043	1,350	693	33.92%
27	778	561	217	27.89%
28	241	117	124	51.45%
29	1,885	1,158	727	38.57%
30	1,041	807	234	22.48%
31	1,102	809	293	26.59%
33	604	447	157	25.99%
34	805	607	198	24.60%
35	1,308	1,057	251	19.19%
36	470	305	165	35.11%
38	2,352	1,865	487	20.71%
39	916	784	132	14.41%
41	285	280	5	1.75%
43	232	209	23	9.91%
44	418	386	32	7.66%
49	859	700	159	18.51%
57	220	220	0	0.00%
62	1,189	920	269	22.62%
63	1,501	1,297	204	13.59%
64	1,184	964	220	18.58%
65	1,709	1,167	542	31.71%
66	583	515	68	11.66%
67	32	31	1	3.13%
68	1,443	1,345	98	6.79%
69	1,298	842	456	35.13%
70	1,554	957	597	38.42%
72	75	0	75	100.00%
73	186	156	30	16.13%
74	1,715	1,100	615	35.86%
75	1,453	923	530	36.48%
76	2,025	1,114	911	44.99%
78	349	244	105	30.09%
80	894	542	352	39.37%
81	1,125	696	429	38.13%
82	1,245	784	461	37.03%
83	1,761	959	802	45.54%
85	2,153	1510	643	29.87%
86				
112	732	430	302	41.26%
114	1,309	521	788	60.20%
122	742	419	323	43.53%
123	1,098	508	590	53.73%
124	3,174	1,255	1919	60.46%
132	323	179	144	44.58%
<b>TOTAL</b>	<b>50,156</b>	<b>33,040</b>	<b>17,116</b>	<b>34.13%</b>



FIGURE 2.10 — EXISTING VACANT RESIDENTIAL LOTS MAP (2016)



## 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 84,716 square feet of non-residential space. The total for 2016 is highlighted by both the variety of non-residential uses and the number of non-residential projects completed in the City. This is in contrast to last year (2015) when two projects, Island Walk (shopping center) and City Hall accounted for over 90% of the total new development in the City.

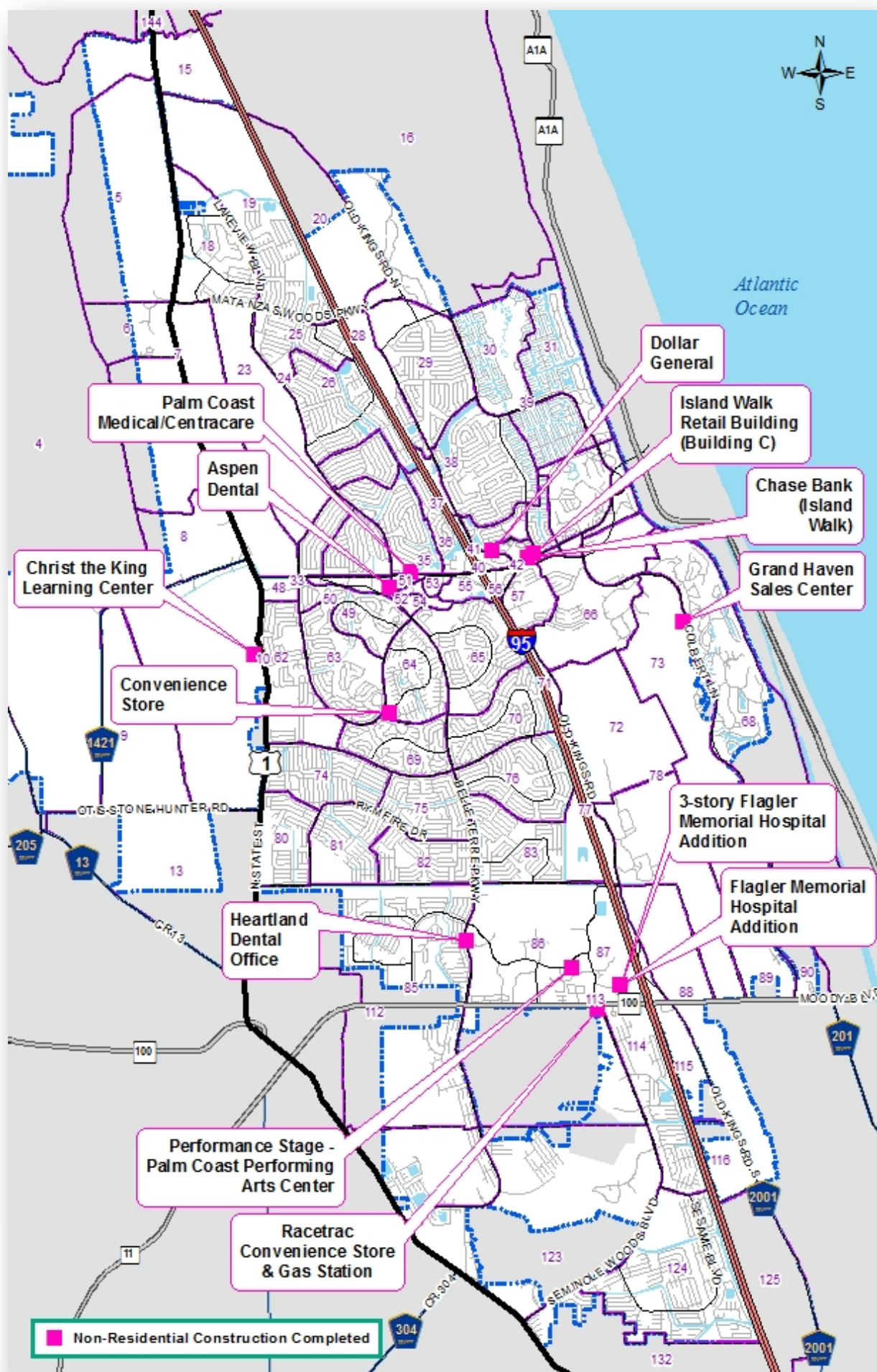
FIGURE 3.1 — NON-RESIDENTIAL CONSTRUCTION COMPLETED TABLE (2016)

	TAZ	Sq. Ft.	Description
Christ The King Addition	10	13,795	Early Learning Center
Palm Coast Medical/Centracare	35	5,000	Office Building
Dollar General	42	7,570	Retail Building
Chase Bank (Island Walk)	42	3,368	Bank
Island Walk Retail Building (Building C)	42	4,293	Retail Building
Aspen Dental	50	3,800	Office Building
Convenience Store	64	3,050	Convenience Store
Grand Haven Sales Center	73	4,720	Office Building
Heartland Dental Office	86	5,000	Commercial Building
3-story Florida Hospital Addition	86	18,703	Hospital Addition (32-beds)
Florida Hospital Addition	86	1,975	Hospital Addition
Performance Stage - Palm Coast Performing Arts Center	86	7,420	Pavilion
Racetrac Convenience Store & Gas Station	114	6,022	Retail Building
Summary of Non-Residential construction completed in 2016		84,716	Sq. ft. of non-residential



FIGURE 3.2 — NON-RESIDENTIAL CONSTRUCTION COMPLETED (2016)

# SECTION 3



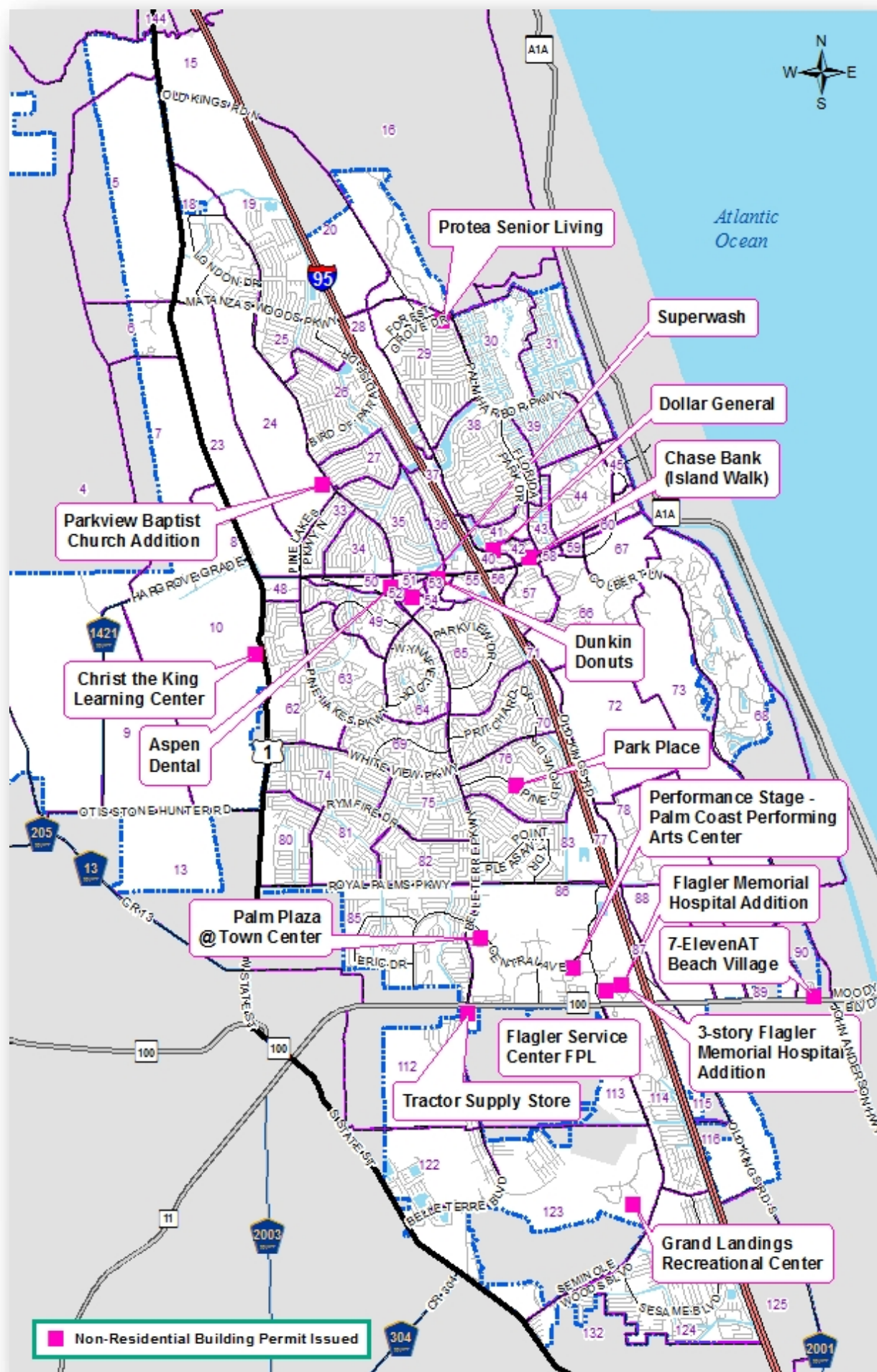
## BUILDING PERMITS ISSUED

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 205,385 square feet of non-residential space, this amount is an increase over last year's total (2015) of 133,422.

FIGURE 3.3 — NON-RESIDENTIAL BUILDING PERMITS ISSUED TABLE (2016)

	TAZ	Sq. Ft.	Description
Christ The King Addition	10	13,795	Early Learning Center
Parkview Baptist Church Addition	24	12,146	Institutional
Protea Senior Living	29	67,432	ALF/ 100 Bed
Dollar General	42	7,570	Retail Building
Chase Bank (Island Walk)	42	3,368	Bank
Aspen Dental	50	3,800	Office Building
Dunkin Donuts	53	3,668	Reconstruction of building
Superwash	54	8,327	Carwash
Park Place	76	1,527	Amenity Building
Palm Coast Plaza	86	6,000	Retail Building
Performance Stage - Palm Coast Performing Arts Center	86	7,420	Pavilion
Figler Service Center FPL	86	25,436	Operations center
3-story Florida Hospital Addition	86	18,703	Hospital Addition (32-beds)
Florida Hospital Addition	86	1,975	Hospital Addition
7-Eleven AT Beach Village	90	3,066	Convenience store
Tractor Supply Store	113	18,800	Retail
Grand Landings	123	2,352	Amenity Center
Summary of Non-Residential Building Permits Issued in 2016		205,385	Sq. Ft. of non-residential

FIGURE 3.4 — NON-RESIDENTIAL BUILDING PERMITS ISSUED MAP (2016)





## DEVELOPMENT APPROVED

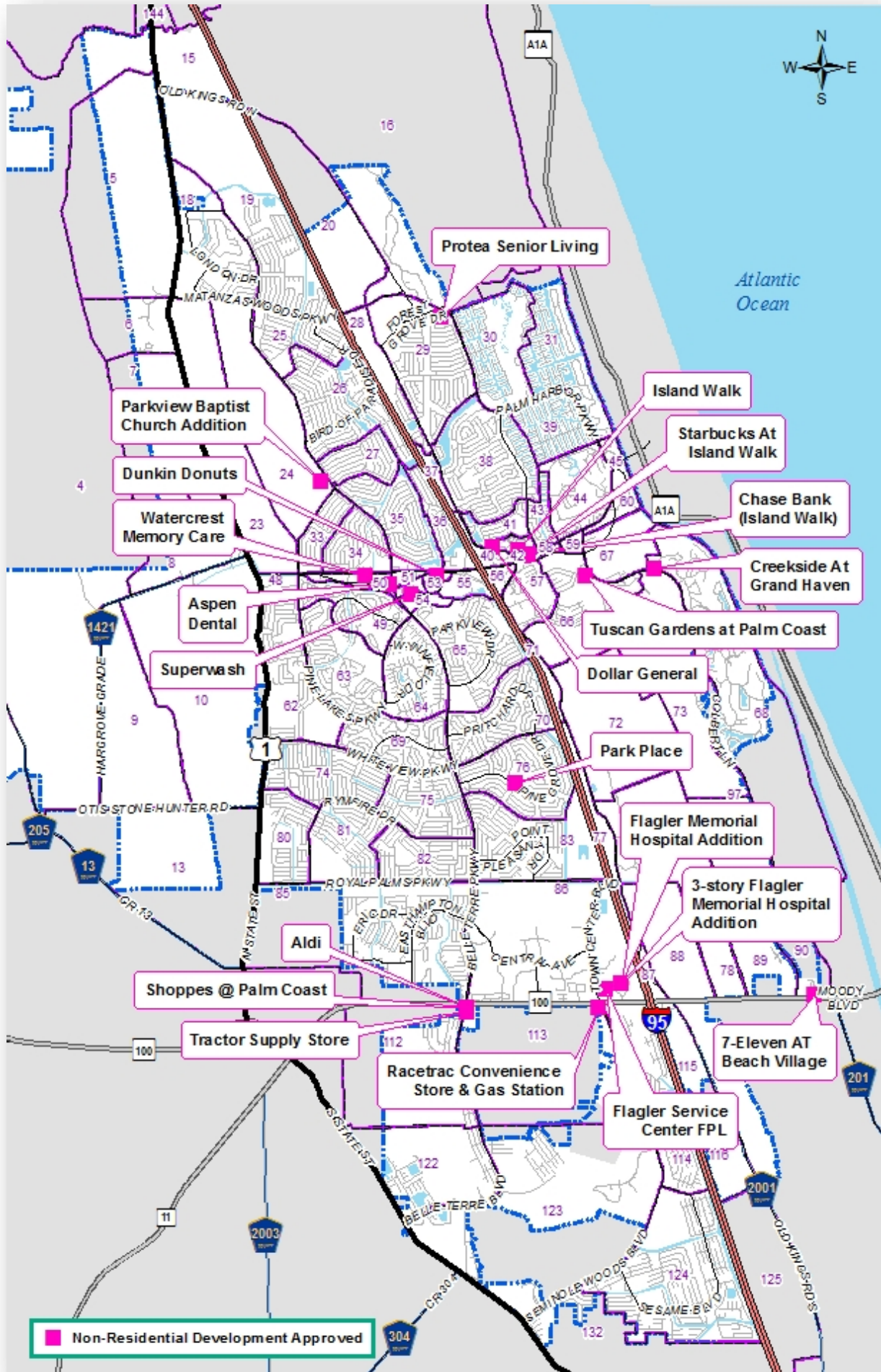
The Planning Division of the Community Development Department issues development orders for non-residential projects. Development orders for non-residential projects allow an applicant to apply for a building permit to construct the residential project and may predict future growth in the short term (1–5 years), depending on a variety of factors. In 2016, development orders approved totaled 547,501 sq. ft. of non-residential use. This total is a significant jump from the previous year's total of 43,144 square feet.

FIGURE 3.5 — NON-RESIDENTIAL DEVELOPMENT APPROVED TABLE (2016)

	TAZ	Sq. Ft.	Description
Parkview Baptist Church Addition	24	12,146	Institutional
Protea Senior Living	29	67,432	ALF/ 100 Bed
Dollar General	42	7,570	Retail building
Chase Bank (Island Walk)	42	3,368	Bank
Island Walk	42	--	Commercial Plat (4 lots)
Starbucks At Island Walk	42	2,064	Restaurant
Aspen Dental	50	3,800	Office building
Watercrest Memory Care	50	45,952	Memory care/70 beds
Dunkin Donuts	53	3,668	Reconstruction of building
Superwash	54	8,327	Carwash
Tuscan Gardens at Palm Coast	66	281,696	ALF and Independent Living
Creekside At Grand Haven	68	18,100	Retail/office building
Park Place Recreational Center	76	1,527	Amenity for Park Place
3-story Florida Hospital Addition	86	18,703	Hospital addition (32-beds)
Flagler Service Center FPL	86	25,436	Operations center
Florida Hospital Addition	86	1,975	Hospital addition
7-Eleven AT Beach Village	90	3,066	Convenience store
Shoppes @ Palm Coast	113	--	Commercial Plat (6 lots)
Tractor Supply Store	113	18,800	Retail
Aldi	113	17,849	Supermarket
Racetrac Convenience Store & Gas Station	114	6,022	Retail building
Summary of Non-Residential Development Approved in 2016		547,501	Sq. Ft. of Non Residential

FIGURE 3.6 — NON-RESIDENTIAL DEVELOPMENT APPROVED MAP (2016)

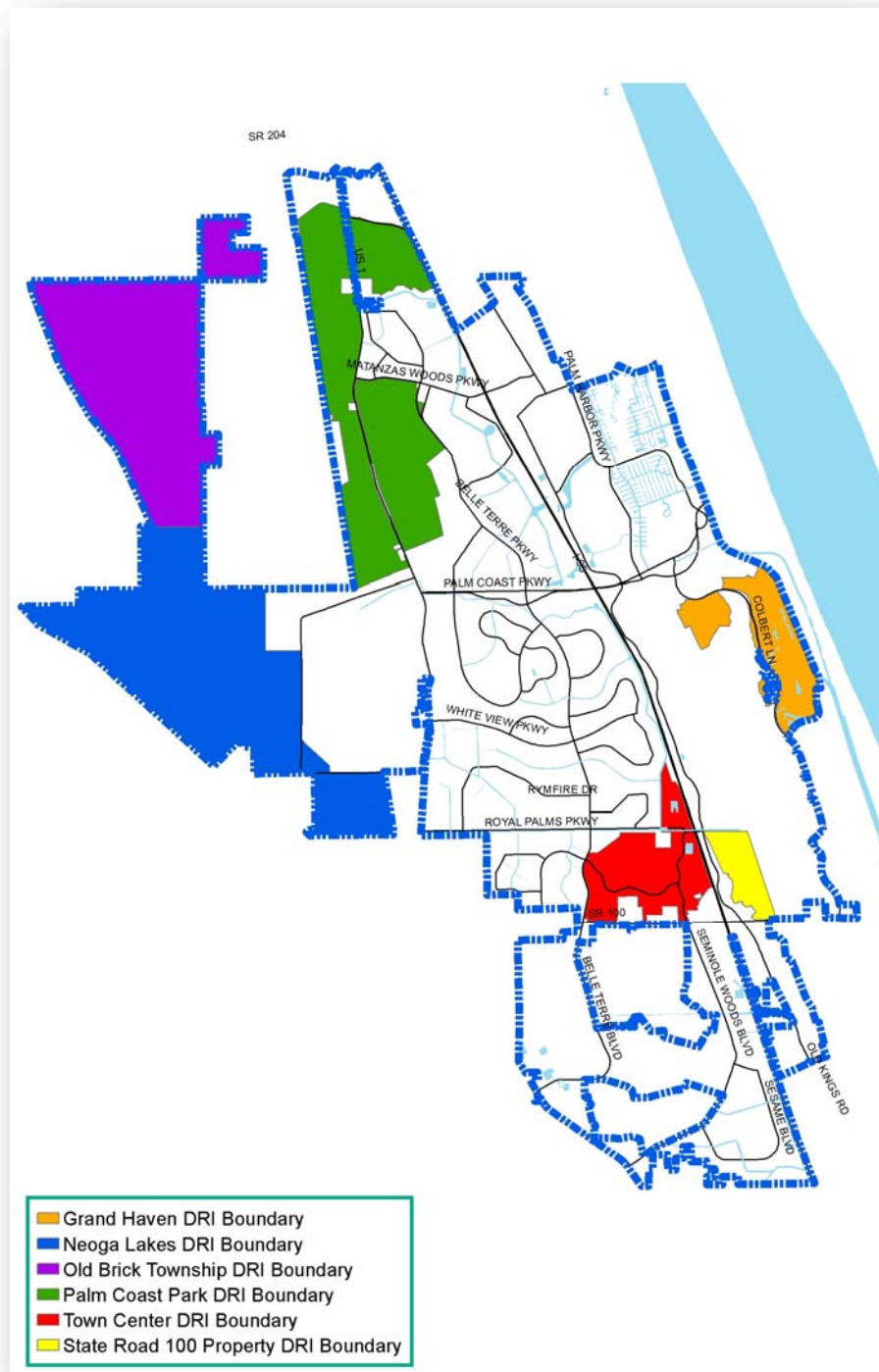
# SECTION 3



## 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 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

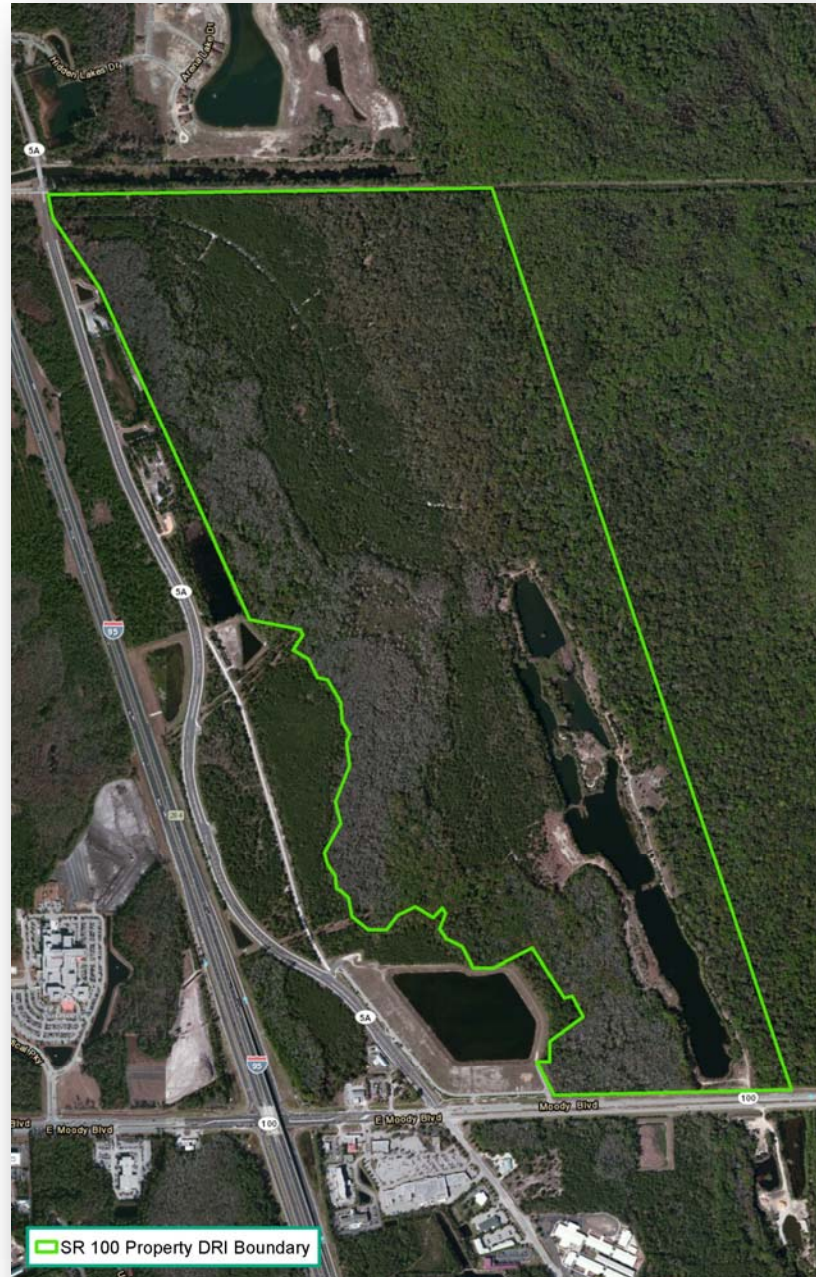


	ENTITLEMENT	DEVELOPMENT APPROVAL	BUILDING PERMITS IS- SUED	CONSTRUCTION COMPLETED
RESIDENTIAL	3,600 du	-	-	-
OFFICE	800,000 sf	-	-	-
RETAIL COMMERCIAL	1,500,000 sf	-	-	-
INDUSTRIAL	80,000 sf	-	-	-
INSTITUTIONAL	100,000 sf	-	-	-

## 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



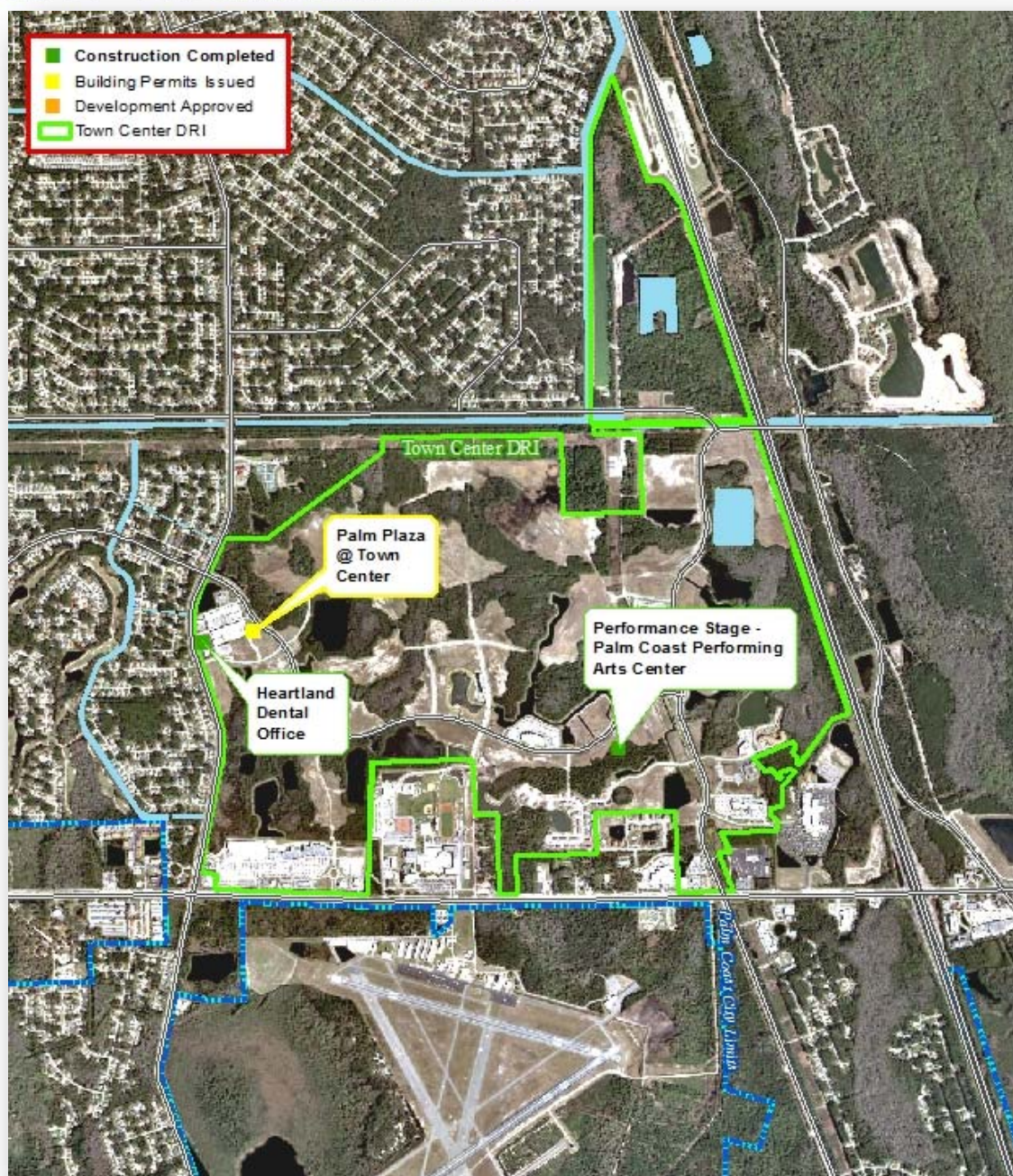
	DRI ENTITLEMENT	DEVELOPMENT APPROVAL	BUILDING PERMITS ISSUED	CONSTRUCTION COMPLETED
RESIDENTIAL (SF)	773 du	-	-	-
RESIDENTIAL (MF)	1,638 du	-	-	-
GENERAL RETAIL	50,000 sf	-	-	-
GENERAL OFFICE	30,000 sf	-	-	-
HOTEL	150 rooms	-	-	-



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

FIGURE 4.4 — TOWN CENTER DRI MAP AND TABLE



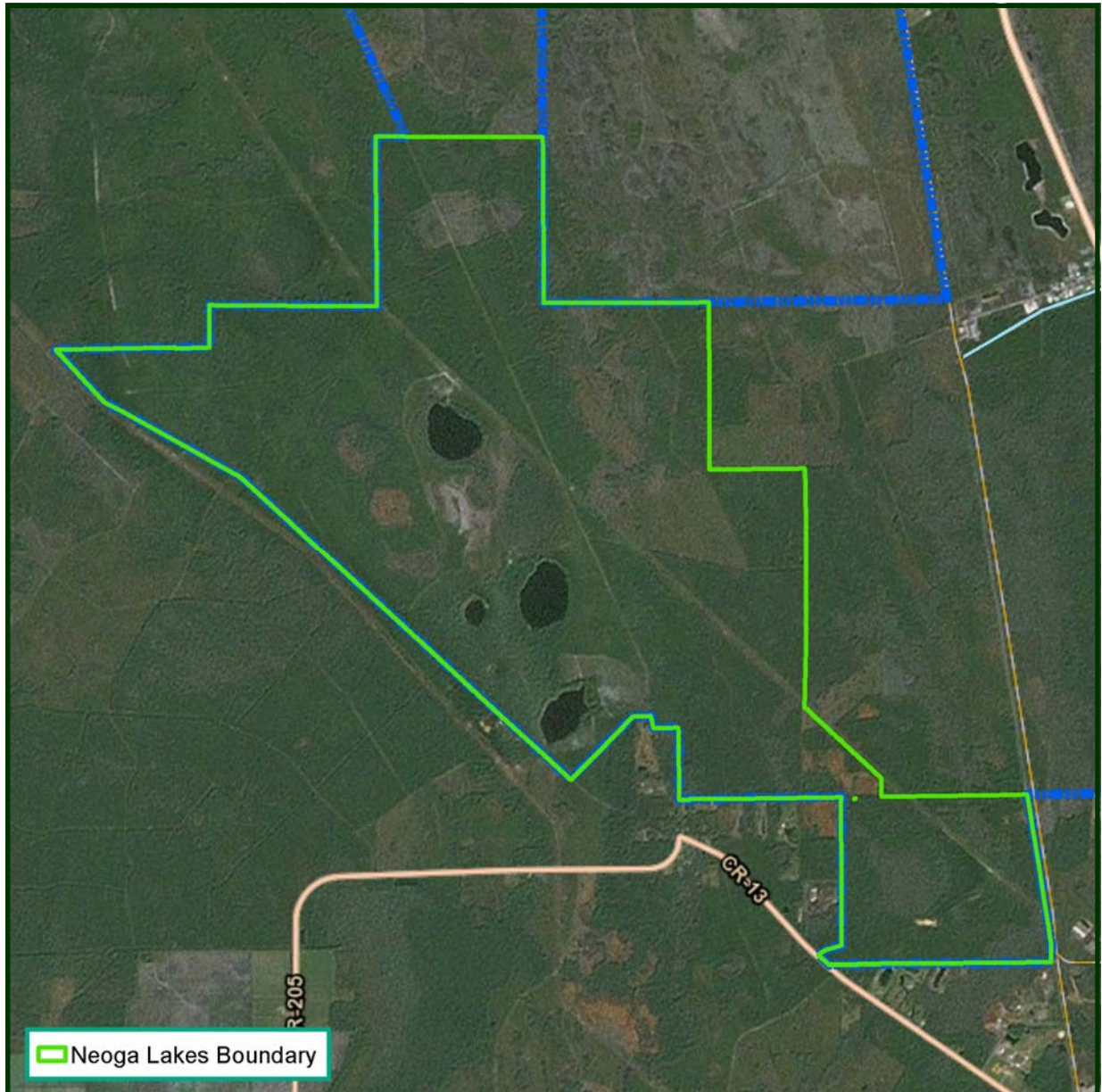
Land Use Category (Totals as of Dec. 31, 2016)	DRI Entitlement	Entitlement Approval	Construction Completed	Entitlement Remaining
Residential	2,500 du	454	219	2,046
Non-Residential	4,800,000 sf	1,760,277	733,612	3,039,723
Movie Theater	2,400 seats	2,400	2,400	-
Lodging	480 rooms	407	327	73
Nursing Home	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

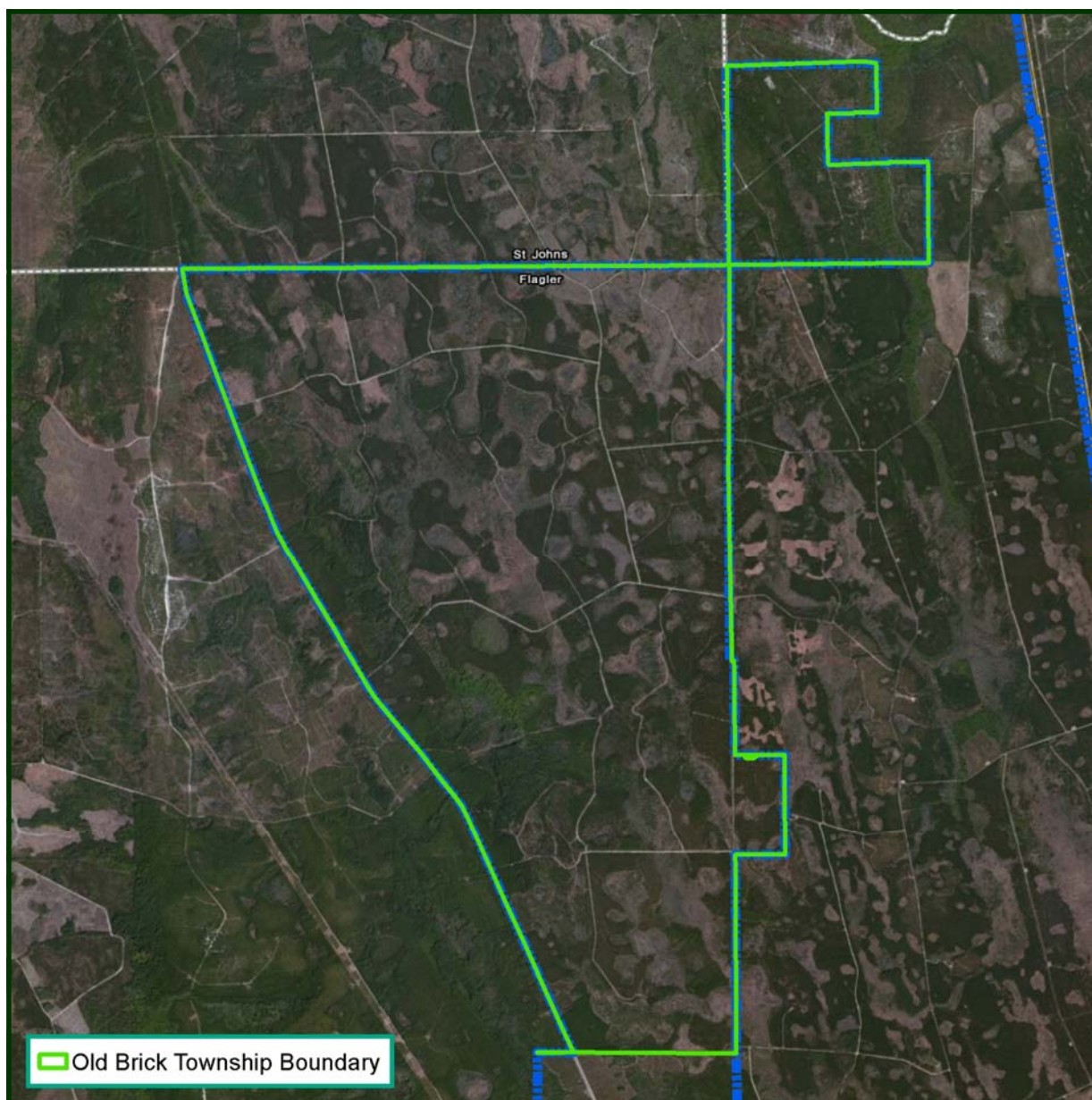


	DRI ENTITLEMENT	DEVELOPMENT APPROVAL	BUILDING PERMITS ISSUED	CONSTRUCTION COMPLETED
RESIDENTIAL	7,000 du	-	-	-
RETAIL USES	354,000 sf	-	-	-
OFFICE USES	45,000 sf	-	-	-
CIVIC USES	222,000 sf	-	-	-
EMPLOYMENT CENTER	1,870,000 sf	-	-	-

## 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 did not review any FLUM amendments that would add to the potential number of residential units in 2016.

### CONVERSION OF RESIDENTIAL UNITS

The City did not review any conversions or redevelopment of residential units in 2016.

### 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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