

# 2020 ANNUAL REPORT







# GROWTH AND DEVELOPMENT TRENDS IN THE CITY OF PALM COAST

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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 2019 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 49.4. 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 I	City of Palm Coast			
	5-Year American Community Survey (2006-2010)	5-Year American Com- munity Survey (2015- 2019)	5-Year American Community Survey (2015-2019)		
% of Population Under 18 Years	21.30%	18.1%	20.0%		
% of Population 65 Years and over	21.8%	28.2%	20.1%		
Median Age	44.4	49.4	42		
Average Household Size	2.51	2.71	2.65		
Median Household Income	\$48,042	\$54,360	\$55,660		
Per Capita Income	\$23,044	\$26,916	\$31,619		
Families Below Poverty Level	8.70%	8.70%	8.9%		
Household Units	27,184	31,683	7,736,311		
Tenure of All Occupied Housing Units (Owner Occupied)	85.9%	74.3%	65.4%		

### **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 almost 12% between 2015 and 2020 (See Figure 1.2).

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

	2016	2017	2018	2019	2020
Population	81,184	82,760	84,575	86,768	89,437
Growth Rate	2.27%	1.71%	2.19%	2.59%	3.08%

### **RATES TABLE**

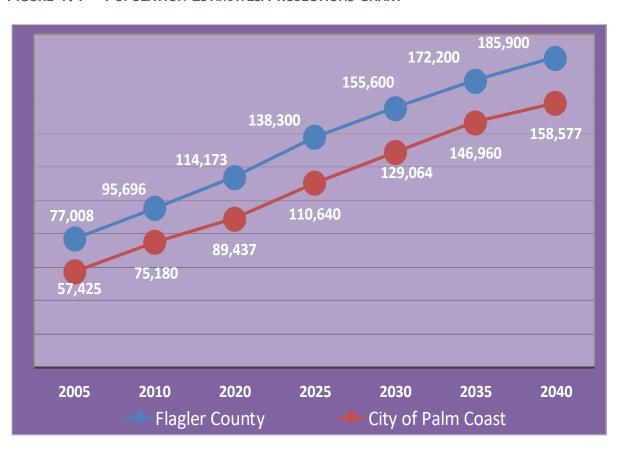
Based on the BEBR population projections for Flagler County (Medium Projection), the City can generate population projections as a share of the County projections. The population projection indicates that by 2040, the City's population will double to about 158,577. These projections have been adjusted 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 (with 5-year Growth Rates)

	2020*	2025**	2030**	2035**	2040**
County Population Projection*	114,173	138,300	155,600	172,200	185,900
City Population Projection***	89,437	110,640	129,064	146,960	158,577
City Growth Rate	12.05%	23.71%	16.65%	13.87%	7.90%

\*2020 BEBR Population Estimates

FIGURE 1.4 — POPULATION ESTIMATES/PROJECTIONS CHART



<sup>\*\*2025-2040</sup> Flagler County Population Projection is Medium BEBR Projections (Volume 49, Bulletin 174, January 2016) adjusted to mid-year (as consistent with Comprehensive Plan-Water Supply Plan)

<sup>\*\*\*</sup> Assumes % of total Flagler County Population Projections

# **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 1,525 dwelling units were issued a CO, this total is a 68% increase from 2019. This included a continuing increase in the number of attached single family units over the past 5 years.

FIGURE 2.1 — RESIDENTIAL CONSTRUCTION COMPLETED TABLE (2016—2020)

	2016	2017	2018	2019	2020
Single-Family Detached Dwelling Units	356	555	623	736	918
Single-Family Attached Dwelling Units (Townhome/Duplex)	6	16	96	168	196
Multi-Family Dwelling Units	0	0	0	0	411
Total Dwelling Units	362	571	719	904	1525

FIGURE 2.2 — RESIDENTIAL CONSTRUCTION COMPLETED CHART (2016—2020)

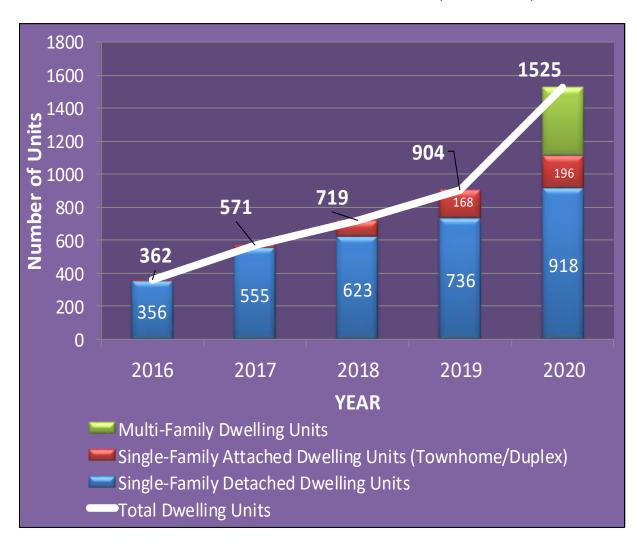
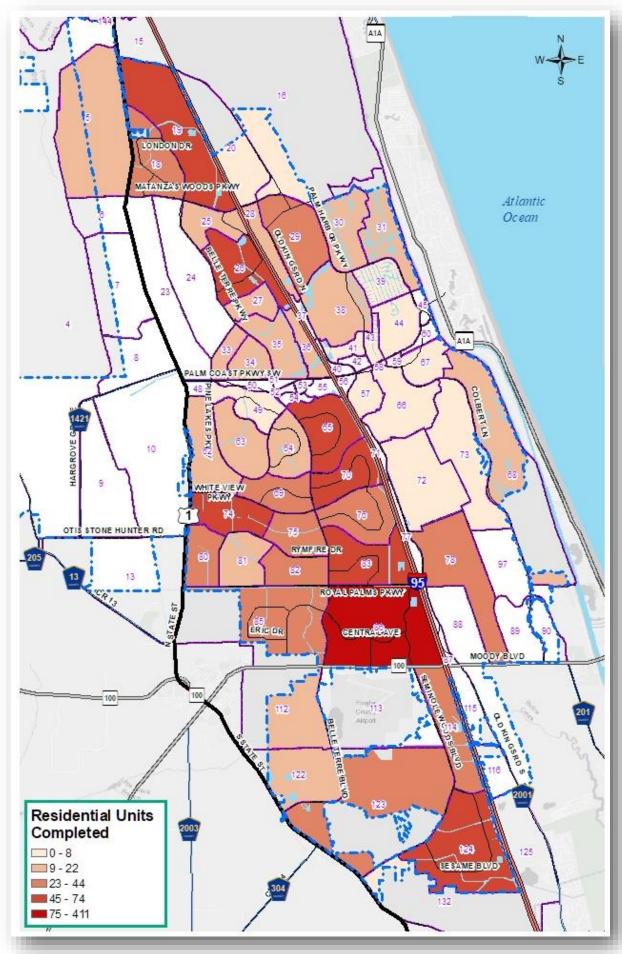


FIGURE 2.3 — RESIDENTIAL CONSTRUCTION COMPLETED MAP (2020)



### **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 (2016—2020)

	2016	2017	2018	2019	2020
Single-Family Detached Dwelling Units	538	630	715	810	1,225
Single-Family Attached Dwelling Units (Townhomes/Duplex)	12	64	166	196	272
Multi-Family Dwelling Units	0	0	0	321	108
Total Dwelling Units	550	694	881	1327	1605

FIGURE 2.5 — RESIDENTIAL BUILDING PERMITS ISSUED CHART (2016—2020)

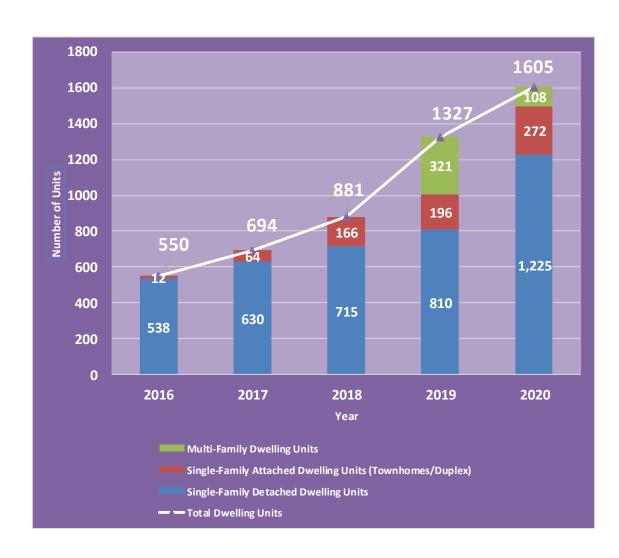
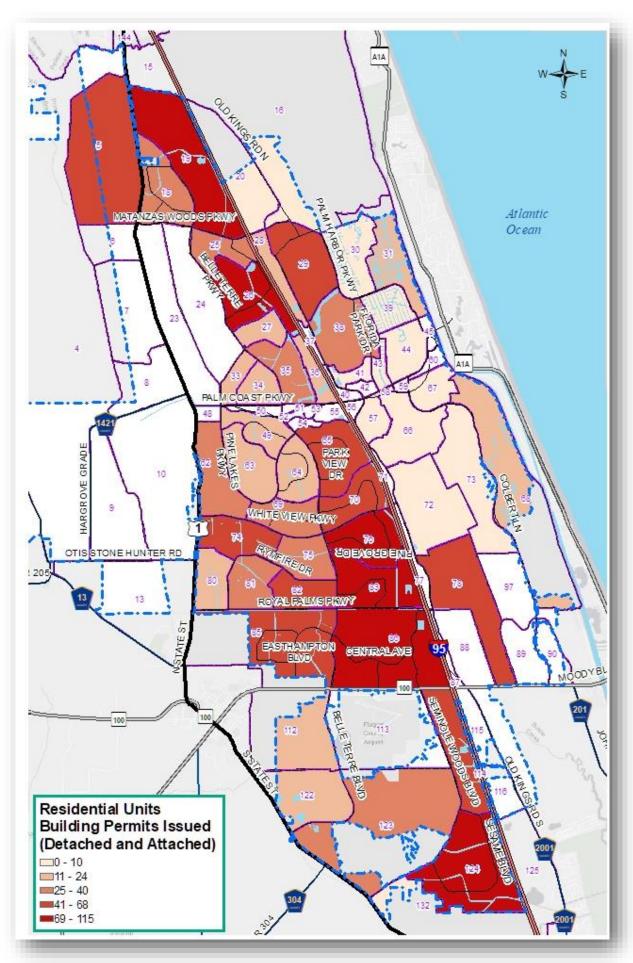


FIGURE 2.6 — RESIDENTIAL BUILDING PERMITS ISSUED MAP (2020)



### **DEVELOPMENT APPROVED**

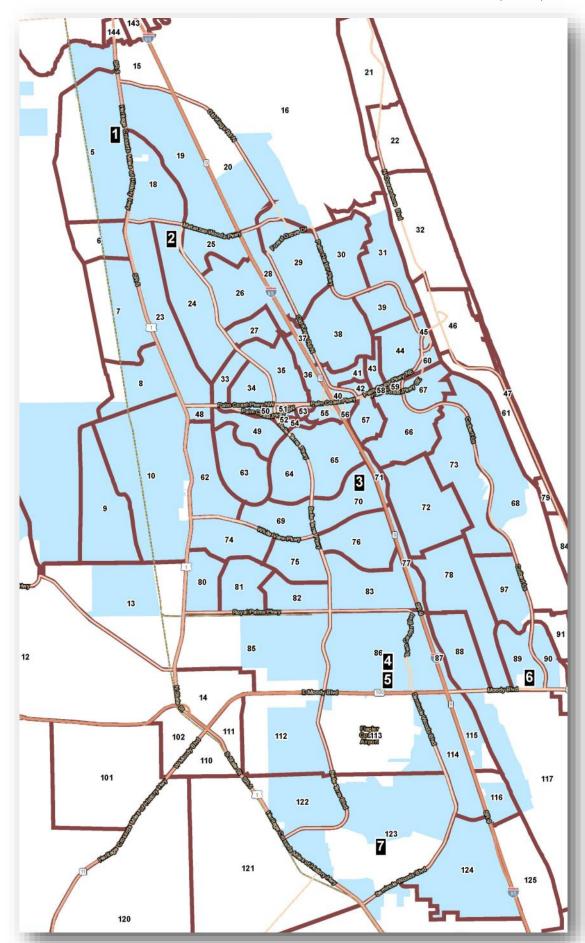
The Planning Division of the Community Development Department issues development orders for residential projects. Development orders allow an applicant to apply for a building permit to construct the residential project and may predict future growth in the short term  $(1-5 \ \text{Years})$ , depending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

In 2020, the following Plat and Development Orders were Approved for residential development.

FIGURE 2.7 — RESIDENTIAL PLAT AND DEVELOPMENT ORDERS APPROVED (2020)

Map ID #	Project Name		# of Units	Description
1	Sawmill Creek	5	259	Final Plat-Single Family
2	Matanzas West	24	285	DO-Multi-family Project
3	American Village	83	32	DO-Multi-family Project
4	Brookhaven Cottages	86	7	DO-Single Family Cottages
5	Tuscan Reserve	86	108	DO-Multi-family Project
6	Ocean Village	89	48	DO-Multi-family Project
7	Grand Landings	123	186	Final Plat-Single Family
Summary Approved	of Residential Units I in 2020		925	dwelling units

Figure 2.8 - Residential Plat and Development Orders Approved Map (2020)



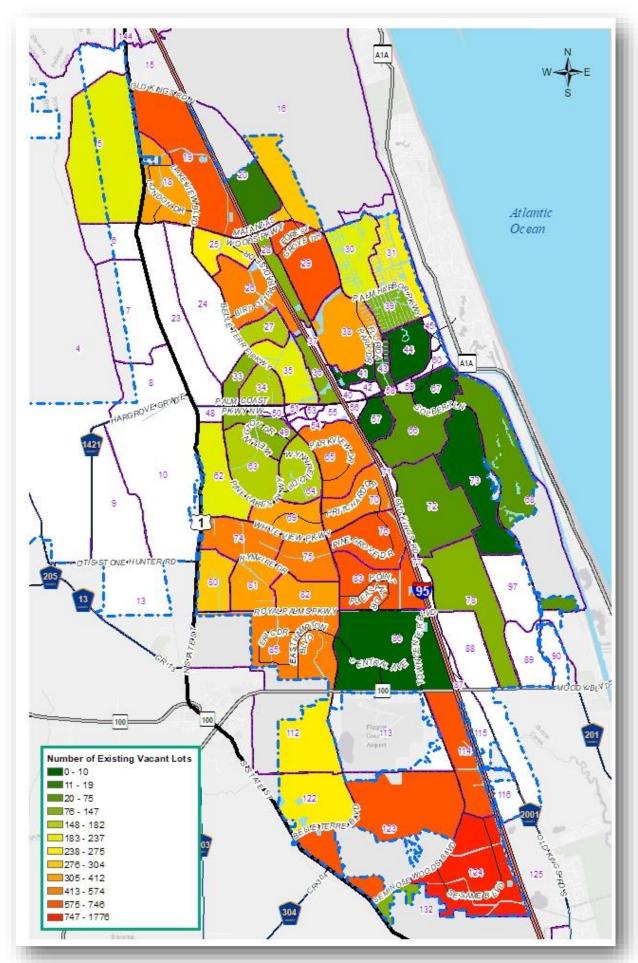
### **EXISTING VACANT LOTS**

The City maintains a database of existing vacant lots for use by its various departments. At the end of 2020, the City contained approximately 15,172 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 (2020)

T.4.7	Totallata	ما المادة	Va sa sat Lata	Danasatana Vasant
TAZ		Occupied Lots		Percentage Vacant
5 16	259 354	22 64	237 290	91.51% 81.92%
18	1040	668	372	35.77%
19	1513	897	616	40.71%
20	22	3	19	86.36%
25	859	591	268	31.20%
26	2029	1455	574	28.29%
27	774	592	182	23.51%
28	236	131	105	44.49%
29	1875	1251	624	33.28%
30	1033	833	200	19.36%
31	1449	1202	247	17.05%
33	601	466	135	22.46%
34	786	629	157	19.97%
35	1309	1095	214	16.35%
36	467	320	147	31.48%
38	2309	1907	402	17.41%
39	959	850	109	11.37%
41	362	356	6	1.66%
43	321	305	16	4.98%
44	967	958	9	0.93%
49	977	838	139	14.23%
57	424	420	4	0.94%
62	1172	948	224	19.11%
63	1493	1314	179	11.99%
64	1177	998	179	15.21%
65	1694	1240	454	26.80%
66	577	525	52	9.01%
67	33	30	3	9.09%
68	2320	2252	68	2.93%
69	1291	887	404	31.29%
70	1543	1027	516	33.44%
72	78	3	75	96.15%
73	183	173	10	5.46%
74	1708	1183	525	30.74%
75	1445	978	467	32.32%
76	2018	1272	746	36.97%
78	503	387	116	23.06%
80	888	584	304	34.23%
81	1117	740	377	33.75%
82	1242	830	412	33.17%
83	1752	1069	683	38.98%
85	2511	2024	487	19.39%
86	9	9	0	0.00%
112	730	476	254	34.79%
114	1301	592	709	54.50%
122 123	738	463 724	275 664	37.26%
	1388			47.84%
124	3156	1380	1776	56.27%
132	486	345	141	29.01%
TOTAL	53,478	38,306	15,172	28.37%

FIGURE 2.10 — EXISTING VACANT RESIDENTIAL LOTS MAP (2020)



# SECTION 3: NON-RESIDENTIAL DEVELOPMENT

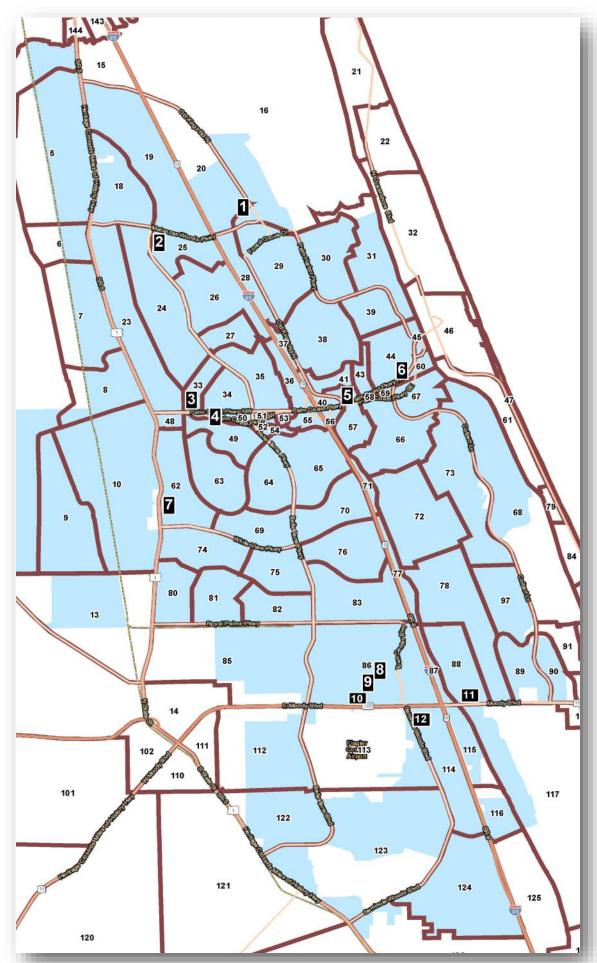
### **CONSTRUCTION COMPLETED**

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 112,281 sq. ft. of non-residential space. The total for 2020 is an increase from the previous year's total of 22,091 square feet. This year's non-residential projects is highlighted by the completion of the City's first Wawa as well additional retail and restaurant space.

FIGURE 3.1 — NON-RESIDENTIAL CONSTRUCTION COMPLETED TABLE (2020)

Map ID #	Project Name	TAZ	Sq. Ft.	Description
1	Storquest Office Building	20	1,074	Office Building
1	Storquest Self-Storage	20	56,408	Self-Storage Complex
2	Dollar General	25	10,556	Retail (General)
3	Pine Lakes Animal Hospital	33	6,905	Veterinary Office
4	O'Reillys	50	7,228	Retail (Auto Parts)
5	Suntrust Bank	42	3,406	Bank
6	Coastal Rehabilitation	44	2,992	Medical Office Building
7	Alamo Phase 2	62	7,500	Office Building
8	Central Landings Clubhouse	86	2,676	Amenity Center
9	The Palms Clubhouse	86	4,614	Amenity Center
10	Wawa Convenience Store	86	6,119	Convenience Store/Gas Station
11	Popeye's	88	2,503	Restaurant
12	Flagler Beach Water Treatment Plant	114	300	Electrical Building
Summary ing Cons	y of Non-Residential Build- truction Completed in 2020		112,281	Sq. Ft. of non- residential

FIGURE 3.2 — Non-Residential Construction Completed (2020)



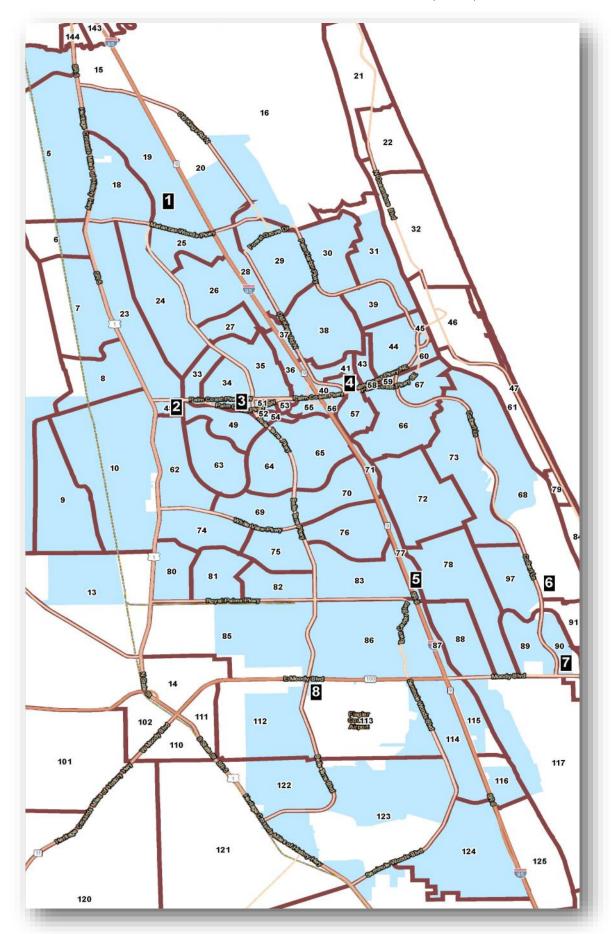
### **BUILDING PERMITS ISSUED**

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 170,927 square feet of non-residential space, this amount is a decrease from last year's total of 232,868 sq.ft.

FIGURE 3.5 — Non-Residential Building Permits Issued Table (2020)

Map ID #	Project Name	TAZ	Sq. Ft.	Description
1	Matanzas Lakes Amenity Center	19	1,500	Recreational Amenity
2	Palm Coast Commerce Storage	48	65,799	Commercial Storage
3	Aldi Grocery Store	50	20,442	Grocery Store
4	Suntrust Bank	42	3,406	Bank
5	Gold Choice Assisted Living	77	34,287	Assisted Living Facility
6	Marina Del Palma Clubhouse	68	3,886	Recreational Amenity
6	Marina Del Palma Stackhouse	68	34,364	Boat Storage
7	Vystar Credit Union	90	2,800	Bank
8	Culvers Restaurant	113	4,443	Restaurant
Summary of Non-Residential Building Permits Issued in 2020			170,927	Sq. ft. of non- residential

FIGURE 3.6 — NON-RESIDENTIAL BUILDING PERMITS ISSUED MAP (2020)



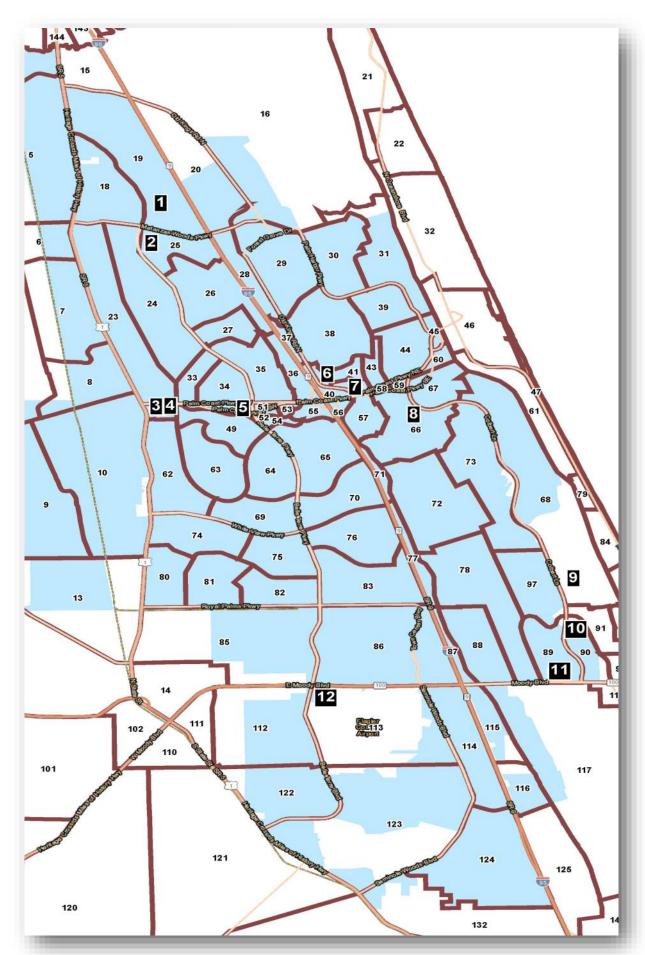
### **DEVELOPMENT APPROVED**

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 non-residential project and may predict future growth in the short term (1—5 years), depending on a variety of factors. In 2020, development orders totaled 503,311 sq.ft. of non-residential uses, this is a significant increase from 2019 total of 257,985 sq. ft.

FIGURE 3.3 — NON-RESIDENTIAL DEVELOPMENT APPROVED TABLE (2020)

Map ID #	Project Name	TAZ	Sq. Ft.	Description
1	Matanzas Lakes Amenity Center	19	1,500	Recreational Amenity
2	Flagler Village Medical Office Bldg.	25	42,760	Medical Building
3	Gioia Sails	48	35,124	Industrial Building
4	Palm Coast Commerce Storage	48	65,799	Commercial Storage
5	Aldi Grocery Store	50	20,442	Grocery Store
6	Checkers	41	954	Restaurant/Fast Food
7	Suntrust Bank	42	3,406	Bank
8	Tuscan Garden Phase II	66	109,958	Assisted Living Facility
9	Marina Del Palma Stackhouse	68	34,364	Boat Storage
9	Marina Del Palma Clubhouse	68	3,886	Recreational Amenity
10	Barnes Office Building	68	16,000	Office Building
11	Bella Cita	89	164,475	Retail & Storage Facility
12	Culvers Restaurant	113	4,443	Restaurant
Summary ment App	of Non-Residential Develop- proved in 2020		503,111	Sq. Ft. of Non Resi- dential

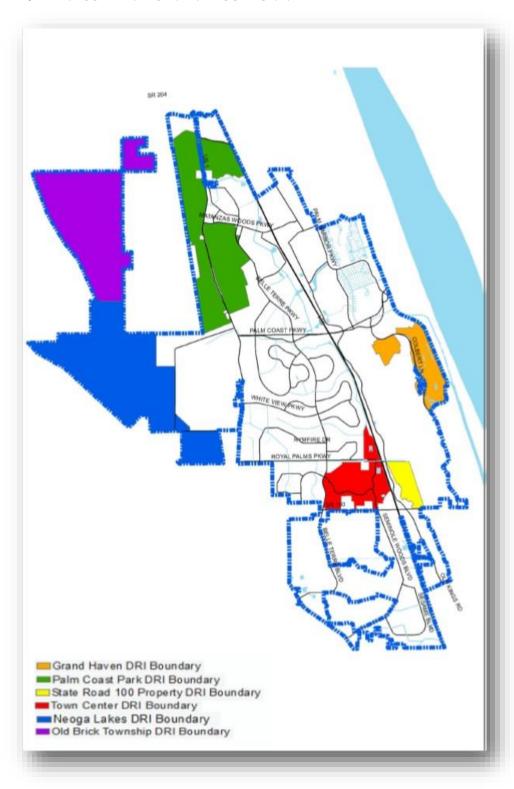
FIGURE 3.4 — NON-RESIDENTIAL DEVELOPMENT APPROVED MAP (2020)



# **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

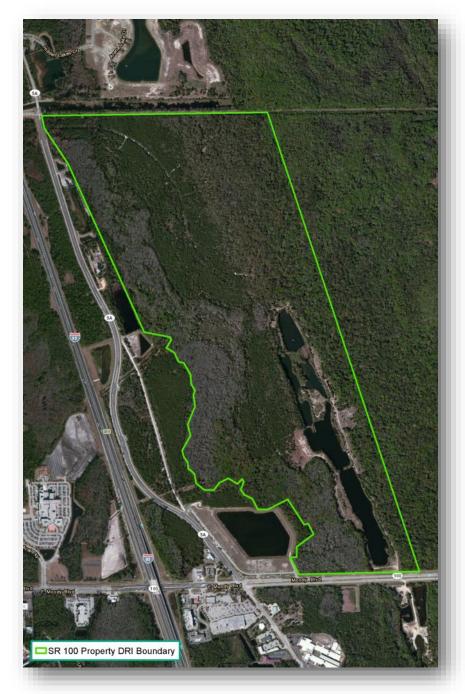


	ENTITLEMENT	ALLOCATED ENTITLEMENTS	Building Permits Issued	Construction Completed
RESIDENTIAL	4,960 du	220	68	22
OFFICE	800,000 sf	362000	-	-
RETAIL COMMERCIAL	1,317,800 sf	821,000	4,250	-
INDUSTRIAL	800,000 sf	600000	-	-
INSTITUTIONAL	100,000 sf	75,000	-	-

### 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

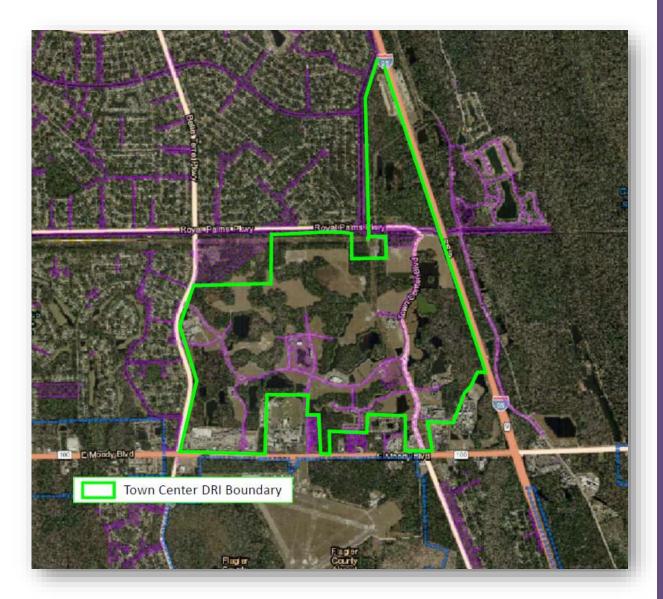


	ENTITLEMENT	DEVELOPMENT APPROVAL	Building Permits Issued	Construction Completed
RESIDENTIAL (SF)	773 du	-	-	-
RESIDENTIAL (MF)	1,638 du	-	-	-
GENERAL RETAIL	50,000 sf	-	-	-
GENERAL OFFICE	30,000 sf	-	-	-
HOTEL	150 rooms	-	-	-

### **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 through 2035. A summary of development approvals is provided in the table below.

FIGURE 4.4 — TOWN CENTER DRI MAP AND TABLE

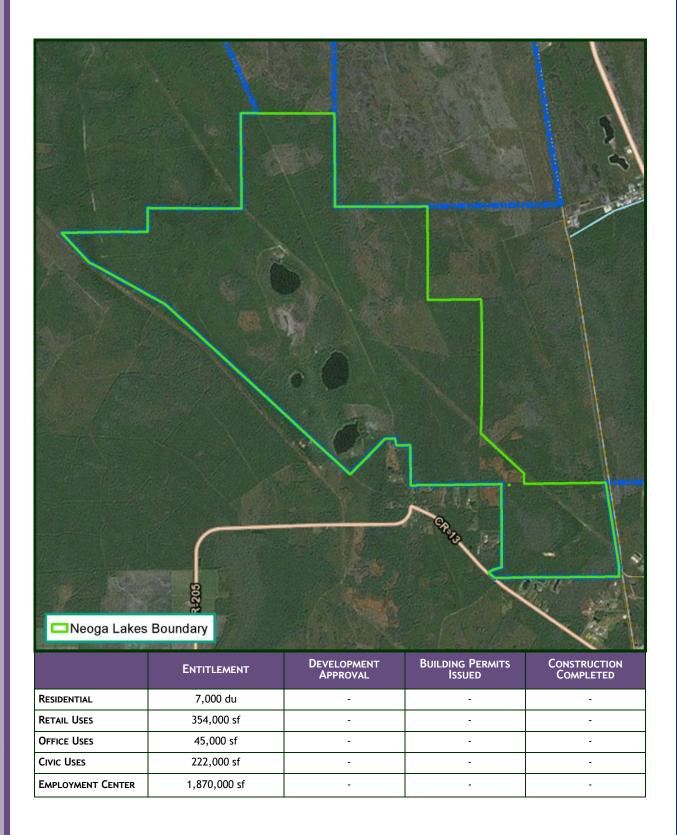


Land Use Category (Totals as of Dec. 31, 2018)	Entitlement	Entitlement Approval	Construction Completed	Entitlement Remaining
Residential	2,500 du	1767	540	733
Non-Residential	4,800,000 sf	1,777,496	742,760	3,022,504
Movie Theater	2,400 seats	2,400	2,400	0
Lodging	480 rooms	407	327	73
Nursing Home	240 beds	0	0	0

### **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.

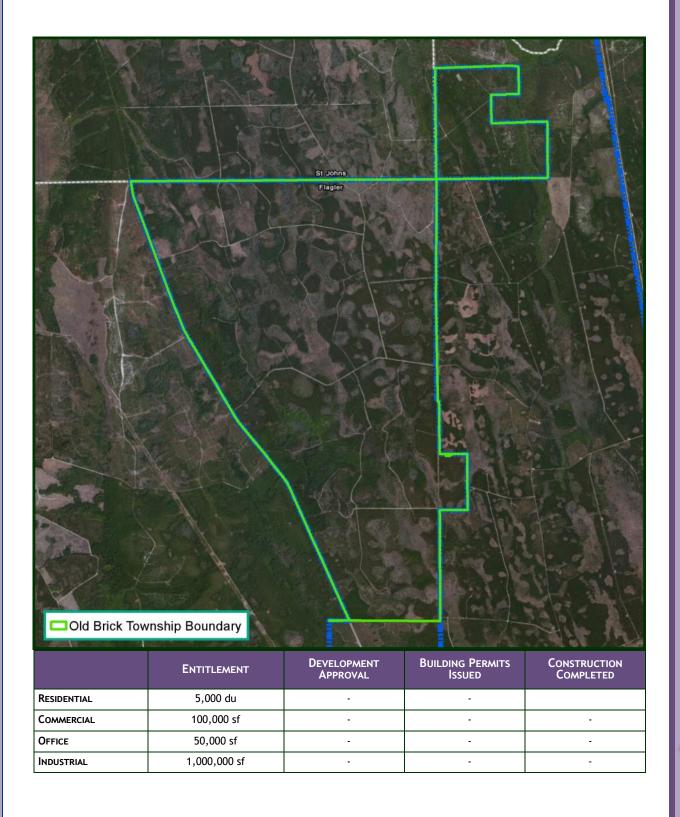
FIGURE 4.5 — NEOGA LAKES DRI MAP AND TABLE



### **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



# 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 process any Future Land Use Map Amendments or Zoning Map Amendments that would impact school capacity.

### CONVERSION OF RESIDENTIAL UNITS

The City did not review any conversions or redevelopment of residential units in 2020.

### **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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