



2021 ANNUAL REPORT



GROWTH AND DEVELOPMENT TRENDS IN THE CITY OF PALM COAST

COMMUNITY DEVELOPMENT DEPARTMENT



2021 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 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. (Staff notes that the 5-year ACS (2016-2020) is not scheduled to be released until March 2022. Staff will update the table next year.)

FIGURE 1.1 — GENERAL DEMOGRAPHICS TABLE

	City of Palm Coast		Florida
	5-Year American Community Survey (2006-2010)	5-Year American Community 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 1st. Based on these estimates, the City's population grew by over 12% between 2017 and 2021 (See Figure 1.2).

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

	2017	2018	2019	2020	2021
Population	82,760	84,575	86,768	89,437	92,866
Growth Rate	2.27%	1.71%	2.59%	3.08%	3.83%

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 2045, the City's population will grow to about 129,437. These projections have been adjusted based on BEBR projections as noted in the footnotes below (See Figure 1.3 and 1.4 below).

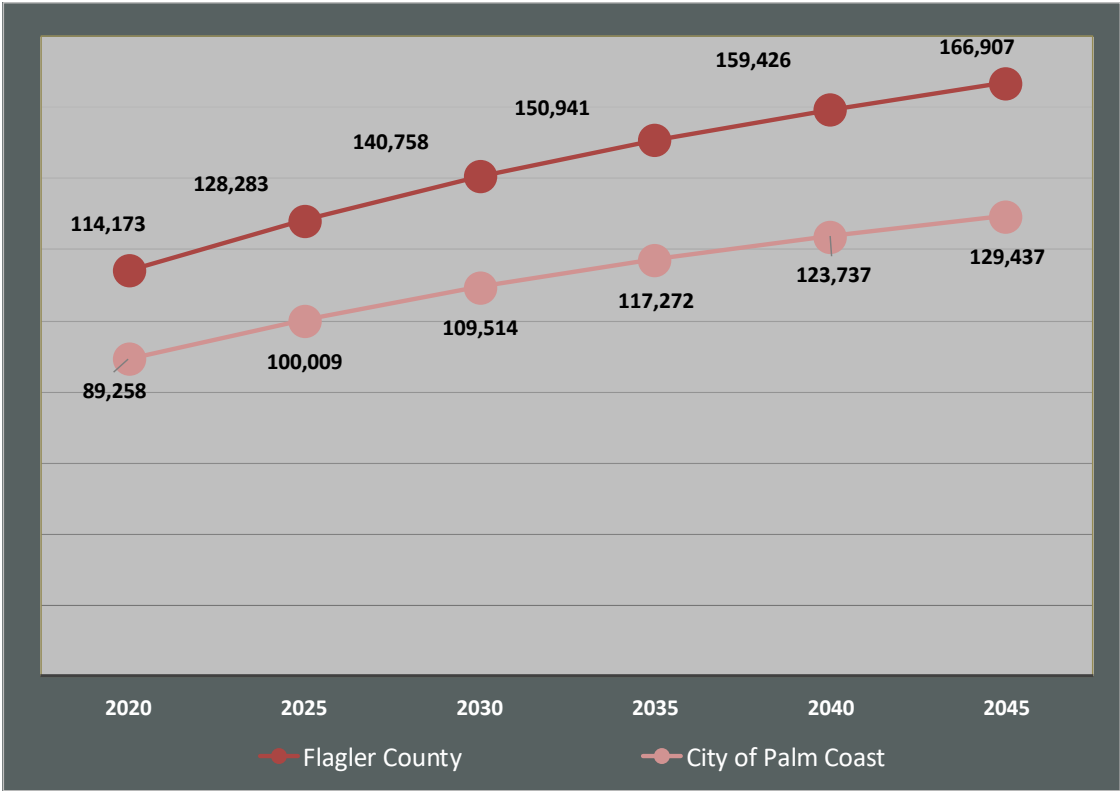
FIGURE 1.3 — BEBR POPULATION PROJECTIONS TABLE (WITH 5-YEAR GROWTH RATES)

	2020*	2025**	2030**	2035**	2040**	2045**
County Population Projection*	114,173	128,283	140,758	150,941	159,426	166,907
City Population Projection***	89,258	100,009	109,514	117,272	123,737	129,437
City Growth Rate		12.04%	9.50%	7.08%	5.51%	4.61%

*2020 U.S. Decennial Census

**Florida Demographic Estimating Conference, March 2021 and the University of Florida, Bureau of Economic and Business Research, Florida Population Studies, Volume 54, Bulletin 189, April 2021

FIGURE 1.4 — POPULATION ESTIMATES/PROJECTIONS CHART



SECTION 2: RESIDENTIAL DEVELOPMENT

CONSTRUCTION COMPLETED

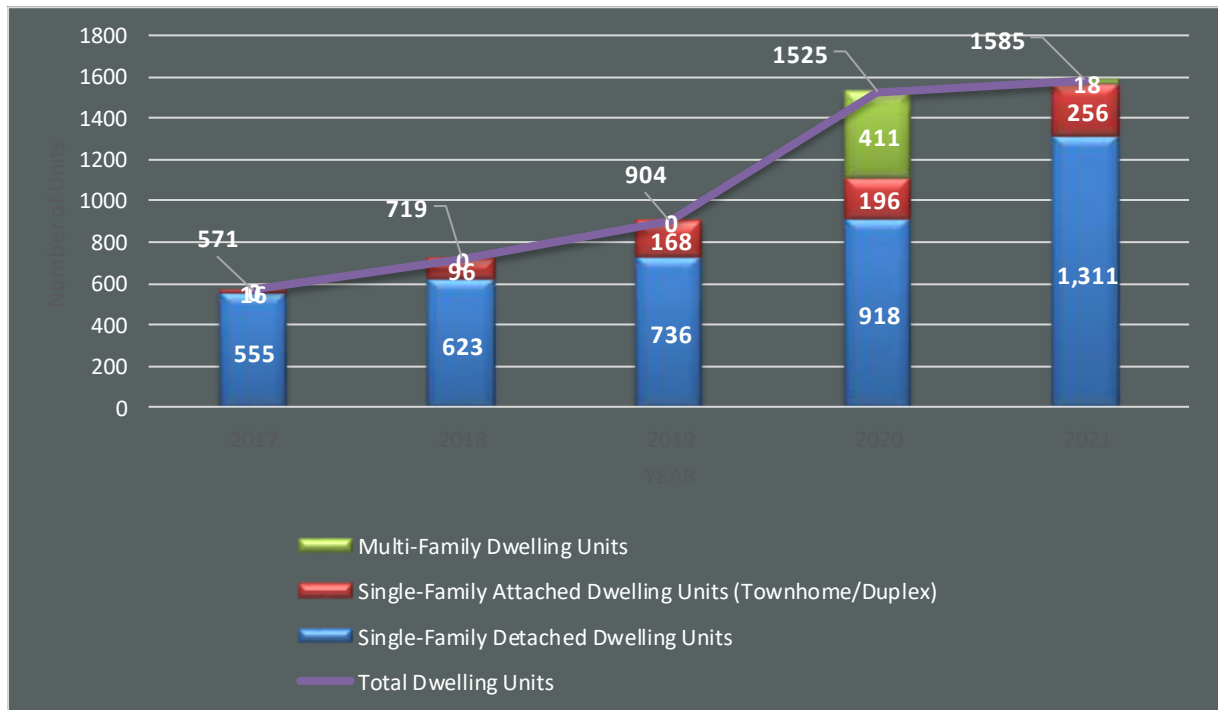
The Building Division of the Community Development Department issues and tracks Certificates of Occupancy, or “COs” for residential construction projects. COs indicate that a residential construction project has been completed and is ready for occupancy.

During the past year a total of 1,585 dwelling units were issued a CO, this total is a 3% increase from 2020. However, it is important to note that the number of COs for single family detached dwelling units increased by 43% from 2020. There was also a significant decrease in the number of multi-family units completed compared to 2020.

FIGURE 2.1 — RESIDENTIAL CONSTRUCTION COMPLETED TABLE (2017–2021)

	2017	2018	2019	2020	2021
Single-Family Detached Dwelling Units	555	623	736	918	1311
Single-Family Attached Dwelling Units (Townhome/Duplex)	16	96	168	196	256
Multi-Family Dwelling Units	0	0	0	411	18
Total Dwelling Units	571	719	904	1525	1585

FIGURE 2.2 — RESIDENTIAL CONSTRUCTION COMPLETED CHART (2017–2021)



SECTION 2



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 1758 single-family detached dwelling units and 338 single-family attached dwelling units were issued building permits. Overall, the number of units issued a building permit increased by over 30% from 2020.

FIGURE 2.4 — RESIDENTIAL BUILDING PERMITS ISSUED TABLE (2017–2021)

	2017	2018	2019	2020	2021
Single-Family Detached Dwelling Units	630	715	810	1,225	1,758
Single-Family Attached Dwelling Units (Townhomes/Duplex)	64	166	196	272	338
Multi-Family Dwelling Units	0	0	321	108	0
Total Dwelling Units	694	881	1327	1605	2096

FIGURE 2.5 — RESIDENTIAL BUILDING PERMITS ISSUED CHART (2017–2021)

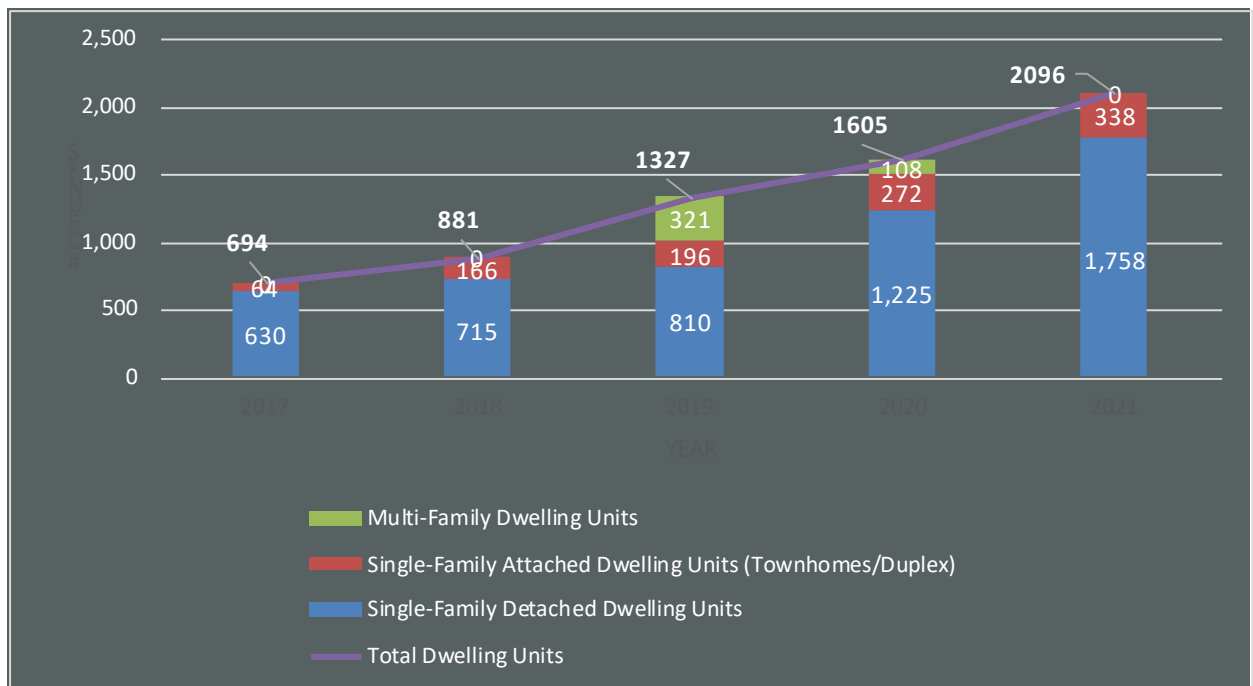
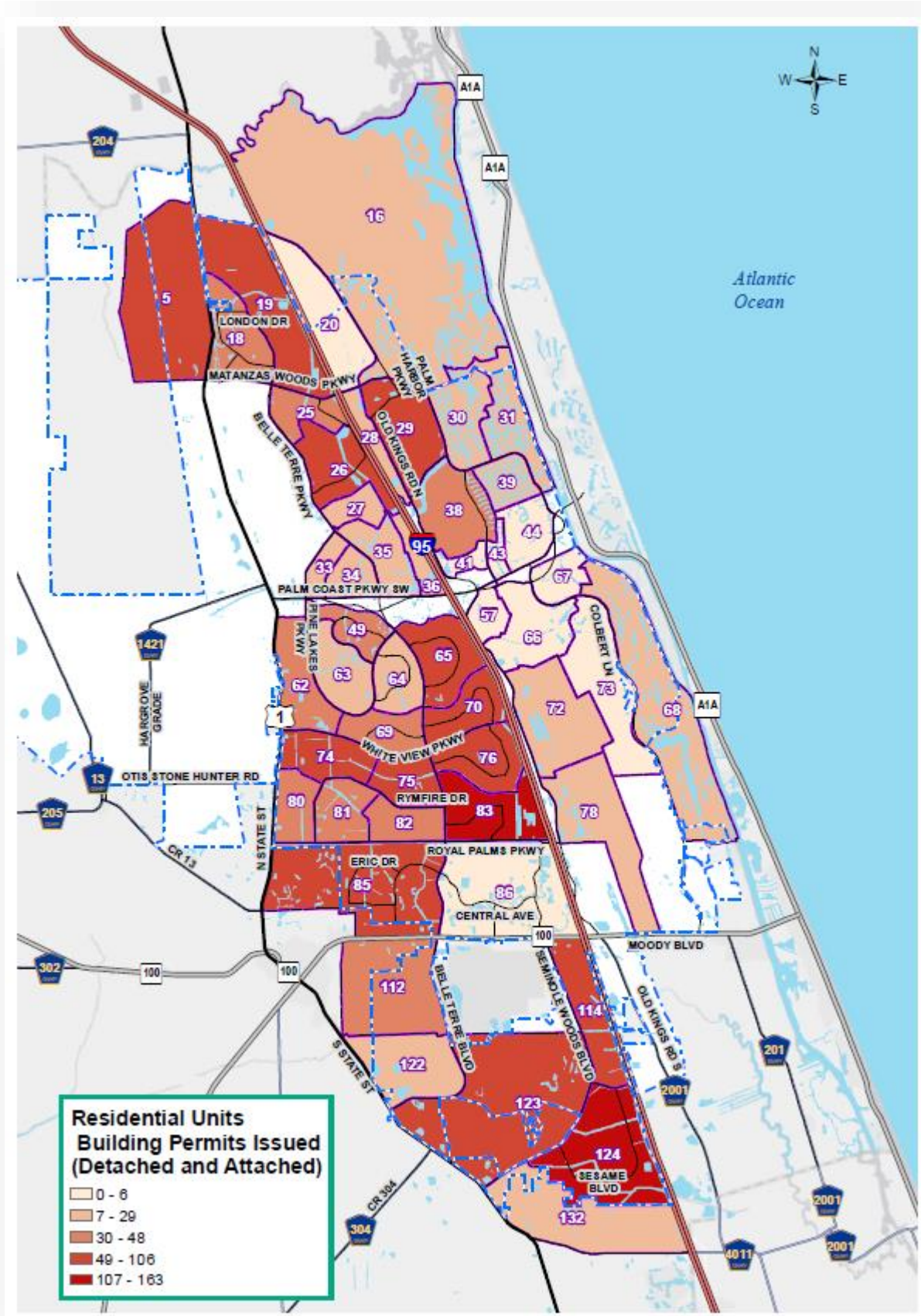


FIGURE 2.6 — RESIDENTIAL BUILDING PERMITS ISSUED MAP (2021)



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 2021, the following Plat and Development Orders were Approved for residential development.

FIGURE 2.7 — RESIDENTIAL PLAT AND DEVELOPMENT ORDERS APPROVED (2021)

Map ID #	Project Name	TAZ	# of Units	Description
1	Lakeview Estates Tract 1	18	200	Single Family
2	Pointe Grande	24	300	Multi-Family
3	The Haven	86	205	Multi-Family
4	The Gables	86	208	Single Family
Summary of Residential Units Approved in 2021			913	Dwelling units

Legend

- Palm Coast City Limits
- MAJOR ROADS
- TAZ

Residential Units Approved

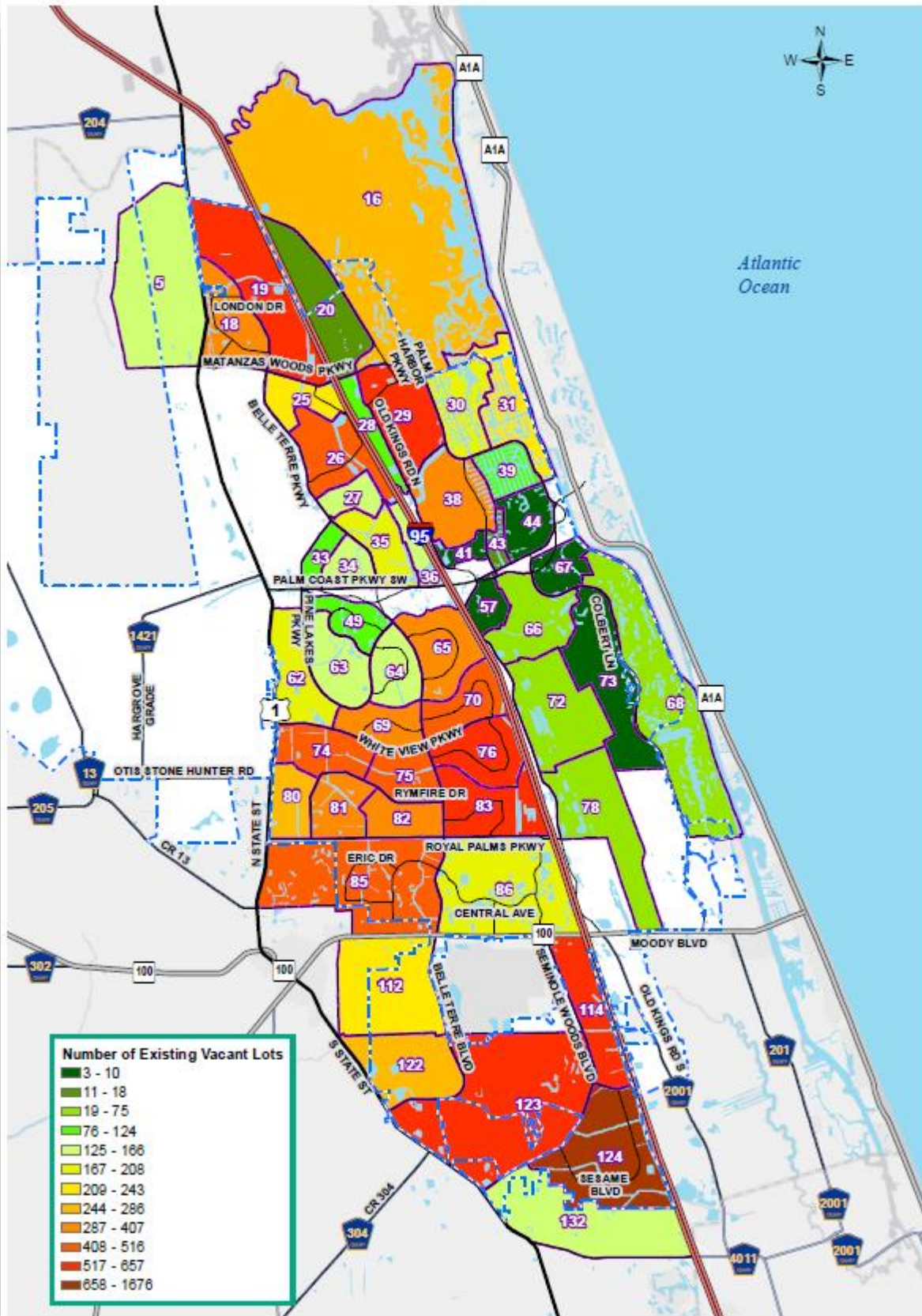
EXISTING VACANT LOTS

The City maintains a database of existing vacant lots for use by its various departments. At the end of 2021, the City contained approximately 13,941 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 (2021)

TAZ	Total Lots	Occupied Lots	Vacant Lots	Percentage Vacant
5	259	118	141	54.44%
16	354	68	286	80.79%
18	1040	692	348	33.46%
19	1513	956	557	36.81%
20	22	4	18	81.82%
25	859	616	243	28.29%
26	2029	1513	516	25.43%
27	774	608	166	21.45%
28	236	143	93	39.41%
29	1875	1305	570	30.40%
30	1033	844	189	18.30%
31	1449	1217	232	16.01%
33	601	478	123	20.47%
34	786	652	134	17.05%
35	1309	1119	190	14.51%
36	467	334	133	28.48%
38	2309	1935	374	16.20%
39	959	858	101	10.53%
41	362	356	6	1.66%
43	321	305	16	4.98%
44	967	959	8	0.83%
49	977	853	124	12.69%
57	424	420	4	0.94%
62	1172	967	205	17.49%
63	1493	1332	161	10.78%
64	1177	1018	159	13.51%
65	1694	1287	407	24.03%
66	577	527	50	8.67%
67	33	30	3	9.09%
68	2320	2268	52	2.24%
69	1291	916	375	29.05%
70	1543	1079	464	30.07%
72	78	6	72	92.31%
73	183	173	10	5.46%
74	1708	1248	460	26.93%
75	1445	1017	428	29.62%
76	2018	1361	657	32.56%
78	503	428	75	14.91%
80	888	608	280	31.53%
81	1117	786	331	29.63%
82	1242	883	359	28.90%
83	1752	1149	603	34.42%
85	2511	2074	437	17.40%
86	208	0	208	100.00%
112	730	497	233	31.92%
114	1301	651	650	49.96%
122	738	479	259	35.09%
123	1388	768	620	44.67%
124	3156	1480	1676	53.11%
132	486	351	135	27.78%
TOTAL	53,677	39,736	13,941	25.97%

FIGURE 2.10 — EXISTING VACANT RESIDENTIAL LOTS MAP (2021)



SECTION 3: NON-RESIDENTIAL DEVELOPMENT

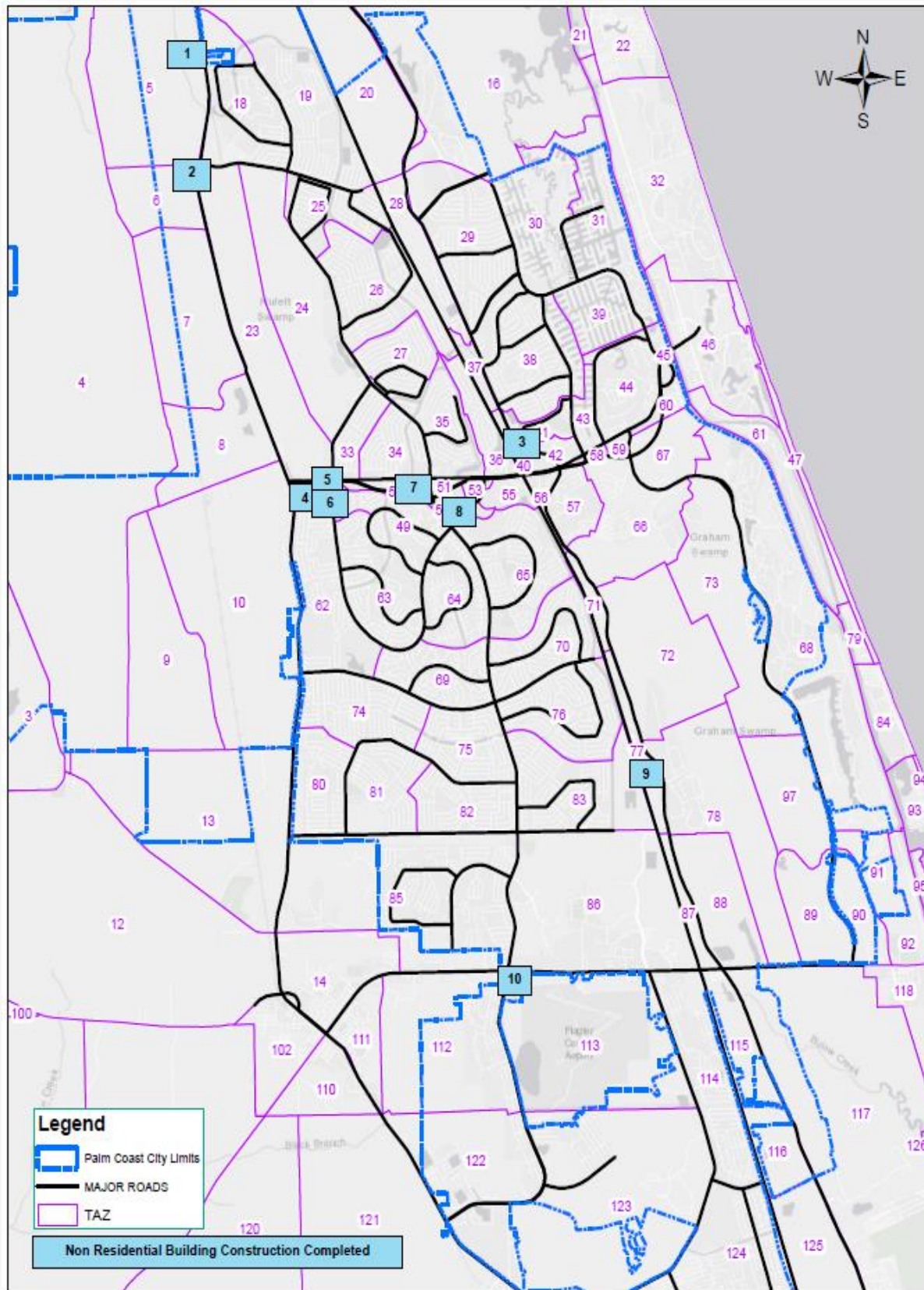
CONSTRUCTION COMPLETED

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 271,865 sq. ft. of non-residential space. The total for 2021 is an increase from the previous year’s total of 112,281 square feet. This year’s non-residential projects is driven mainly by two types of uses, Assisted Living Facilities and Storage/RV parking.

FIGURE 3.1 — NON-RESIDENTIAL CONSTRUCTION COMPLETED TABLE (2021)

Map ID #	Project Name	TAZ	Sq. Ft.	Description
1	Sawmill Creek Phase 1 Amenity Center	5	1,856	Residential Amenity
2	Amoco Gas Station/Convenience Store	5	4,250	Convenience Store/Gas Station
3	Checkers	42	954	Fast Food Restaurant
4	Gioia Sales Ph. 2	48	34,542	Light Industrial Manufacturing
5	Extra Space Storage	48	65,026	Storage/Warehouse
6	Extra Space Storage	48	10,845	Storage/RV Parking
7	Aldi Grocery	50	21,771	Retail-Grocery Store
8	Azure of Palm Coast	54	93,891	Assisted Living Facility
9	Gold Choice	77	34,287	Assisted Living Facility
10	Culvers	112	4,443	Restaurant
Summary of Non-Residential Building Construction Completed in 2021		271,865 Sq. Ft. of non-residential		

FIGURE 3.2 — NON-RESIDENTIAL CONSTRUCTION COMPLETED (2021)



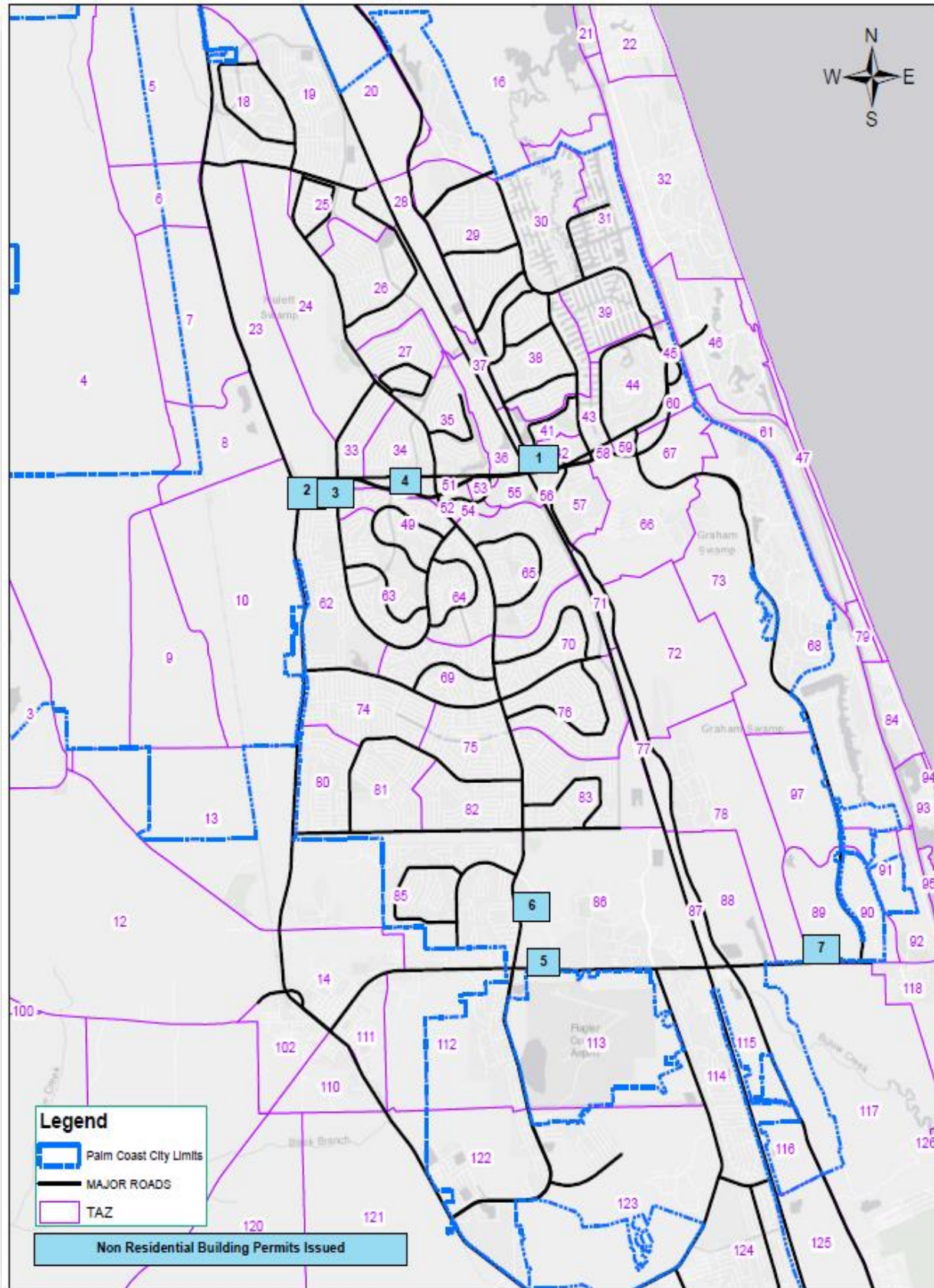
BUILDING PERMITS ISSUED

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 328,771 square feet of non-residential space, this amount is an increase from last year's total of 170,927 sq.ft.

FIGURE 3.5 — NON-RESIDENTIAL BUILDING PERMITS ISSUED TABLE (2021)

Map ID #	Project Name	TAZ	Sq. Ft.	Description
1	Checkers	42	954	Fast Food Restaurant
2	Gioia Sales Ph 2	48	34,542	Light Industrial Manufacturing
3	Extra Space Storage	48	10,845	Storage/RV Parking
4	Advent Health	50	143,486	Hospital - 100 beds
5	Auto Zone	86	6,815	Retail
6	Capstone at Town Center	86	6,300	Office
7	Bella Cita	89	125,829	Storage/Warehouse
Summary of Non-Residential Building Permits Issued in 2021			328,771	Sq. ft. of non-residential

FIGURE 3.6 — NON-RESIDENTIAL BUILDING PERMITS ISSUED MAP (2021)



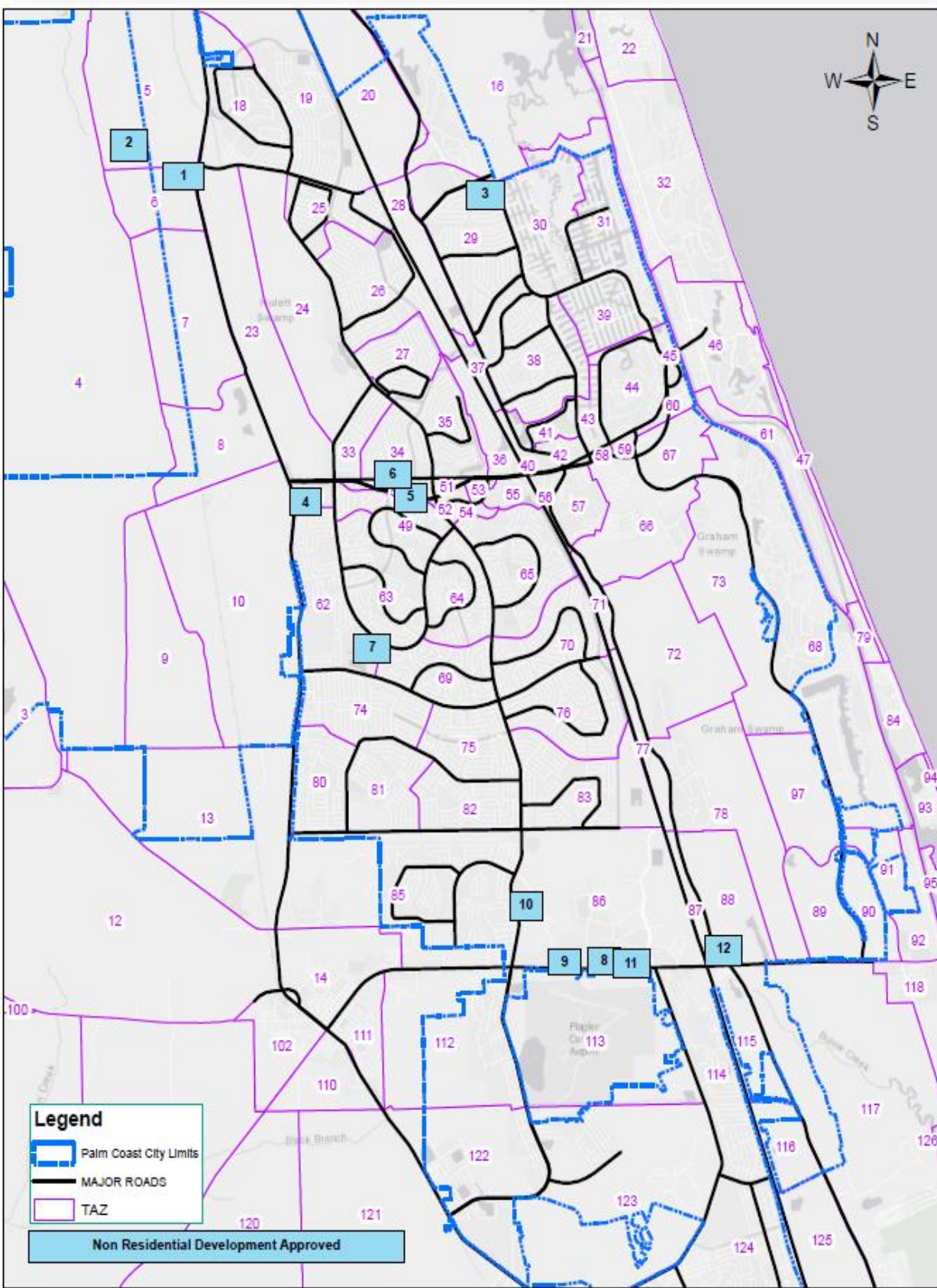
DEVELOPMENT APPROVED

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 2021, development orders totaled 719,334 sq.ft. of non-residential uses, this is an increase from 2020 total of 503,311 sq. ft.

FIGURE 3.3 — NON-RESIDENTIAL DEVELOPMENT APPROVED TABLE (2021)

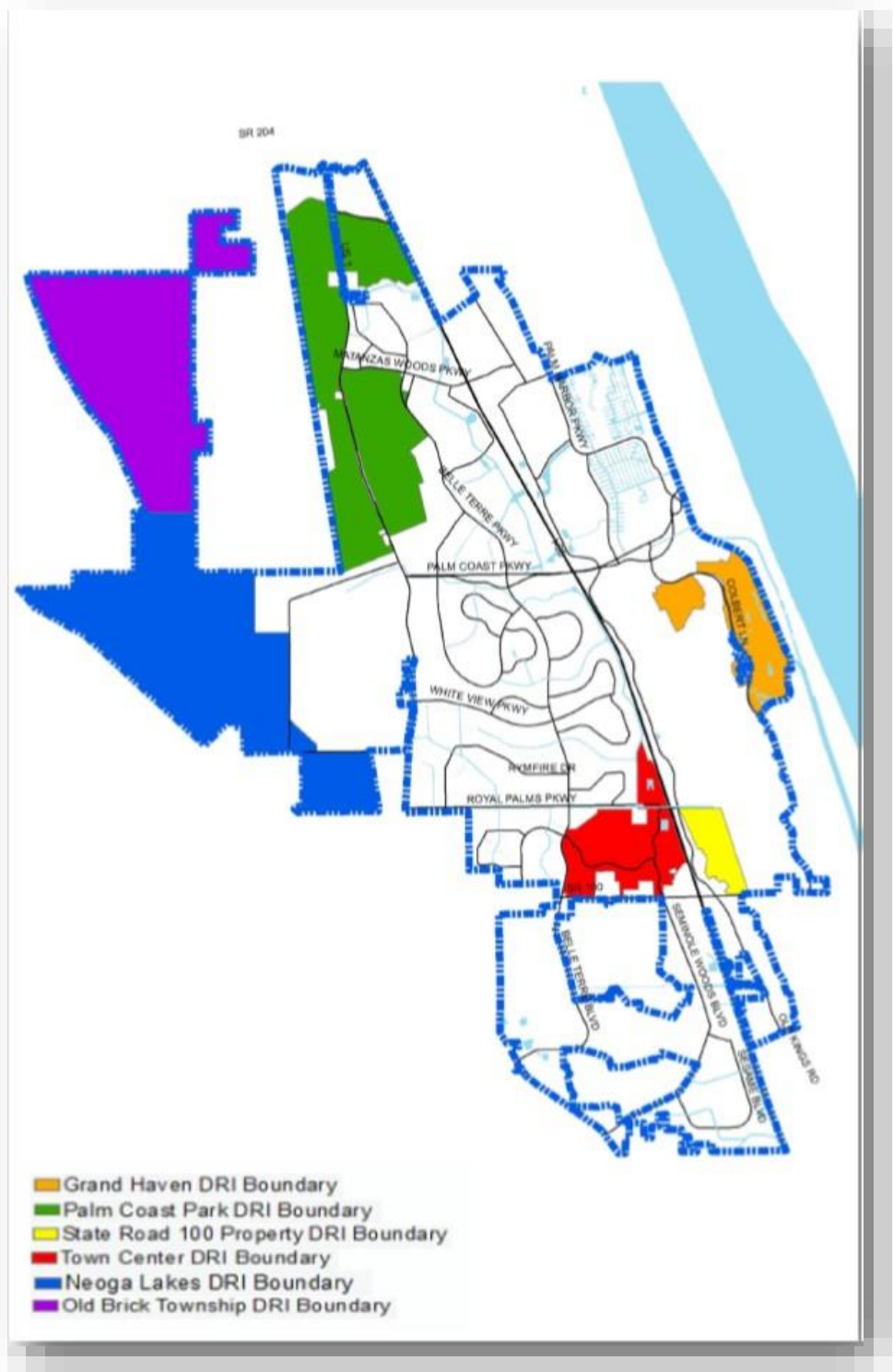
Map ID #	Project Name	TAZ	Sq. Ft.	Description
1	Palm Coast Park Lot 4 Storage	6	90,000	Storage/Warehouse
2	SawMill Branch Phase 2 Amenity Center	6	9,565	Residential Amenity
3	Sabal Palms	29	113,287	Institutional - 100 Independent Living Units in Continuing Care Facility
4	Gioia Sales Ph 2	48	34,542	Light Industrial Manufacturing
5	GoodWill Palm Coast	50	16,000	Retail/Office
6	Advent Health	50	185,000	30,000 sq ft medical office / 155,000 - (100 bed hospital)
7	Whiteview Amenity Center	62	1,151	Residential Amenity
8	Town Center Commons	86	38,623	Office/Retail
9	Auto Zone	86	6,815	Retail
10	Capstone at Town Center	86	6,300	Office
11	Storage King at Town Center	86	216,031	Storage/Warehouse
12	Florida Skin Care Institute	88	2,020	Non-retail Commercial
Summary of Non-Residential Development Approved in 2021			719,334	Sq. Ft. of Non Residential

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



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.

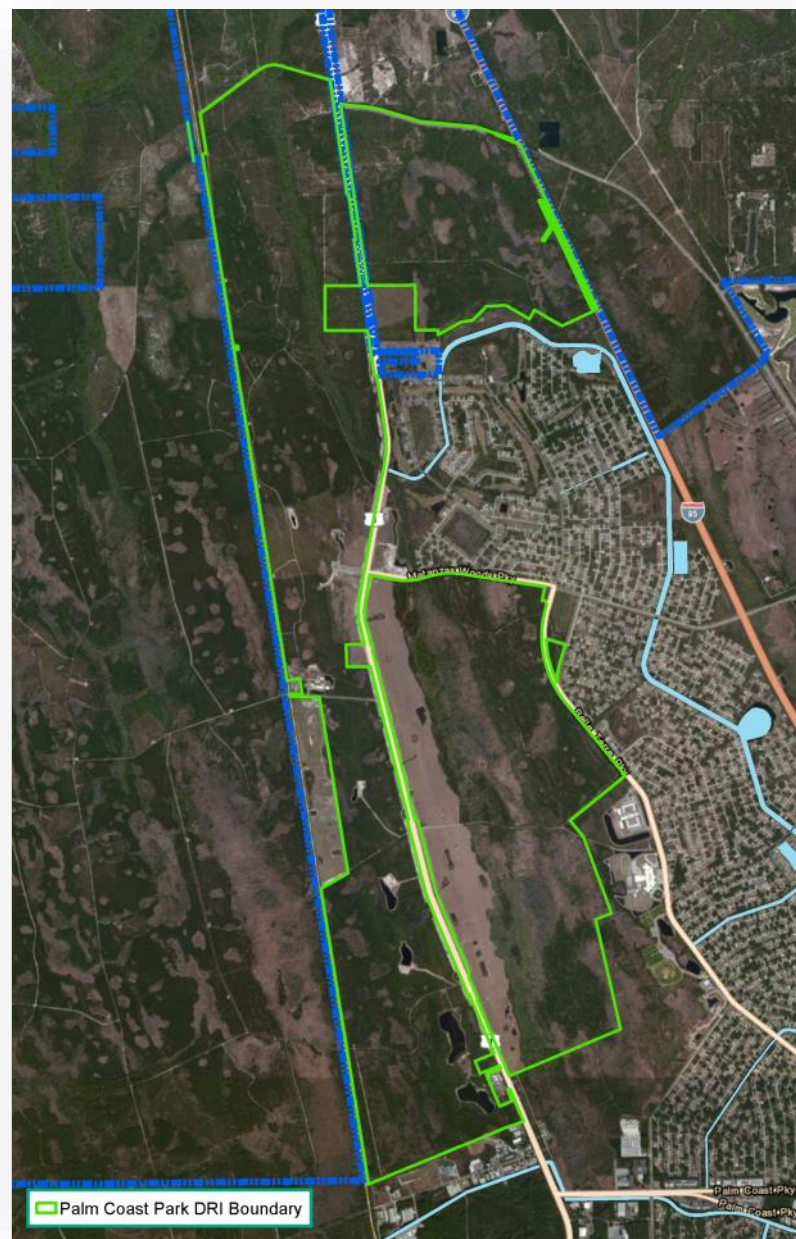
FIGURE 4.1 – MAJOR DEVELOPMENT LOCATION MAP



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	Approved Development (Plats or DOs)	Building Permits Issued (Units or Sq. ft.)	Construction Completed (COs)
Residential	4,960 du	220	164	118
Office	800,000 sf	-	-	-
Retail Commercial	1,317,800 sf	96,106	6,106	6,106
Industrial	800,000 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

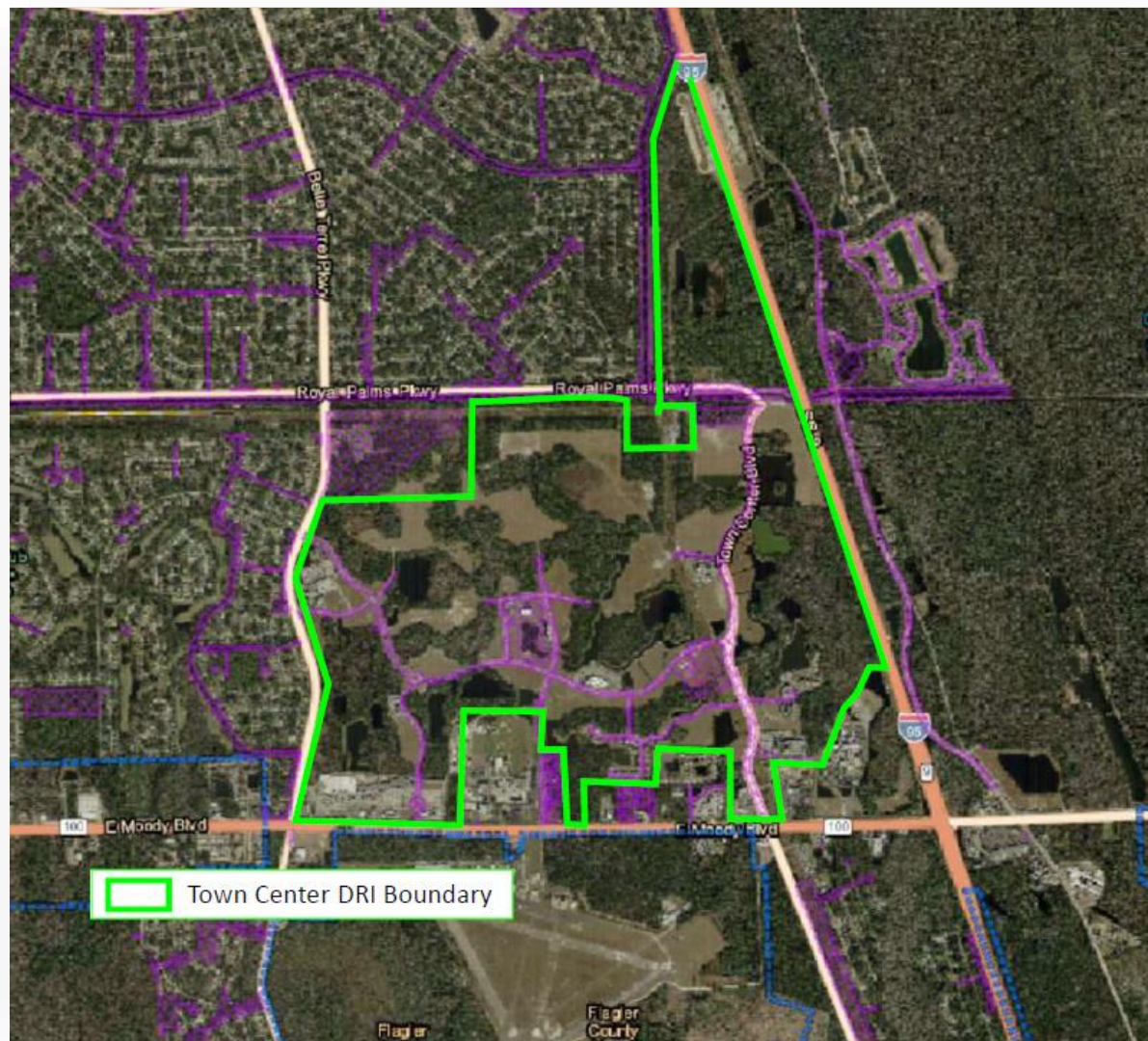


	ENTITLEMENT	Approved Development (Plats or DOs)	Building Permits Issued (Units or Sq. ft.)	Construction Completed (COs)
RESIDENTIAL (SF)	773 du	-	-	-
RESIDENTIAL (MF)	1,638 du	-	-	-
GENERAL RETAIL	50,000 sf	-	-	-
GENERAL OFFICE	30,000 sf	-	-	-
HOTEL	150 rooms	-	-	-

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

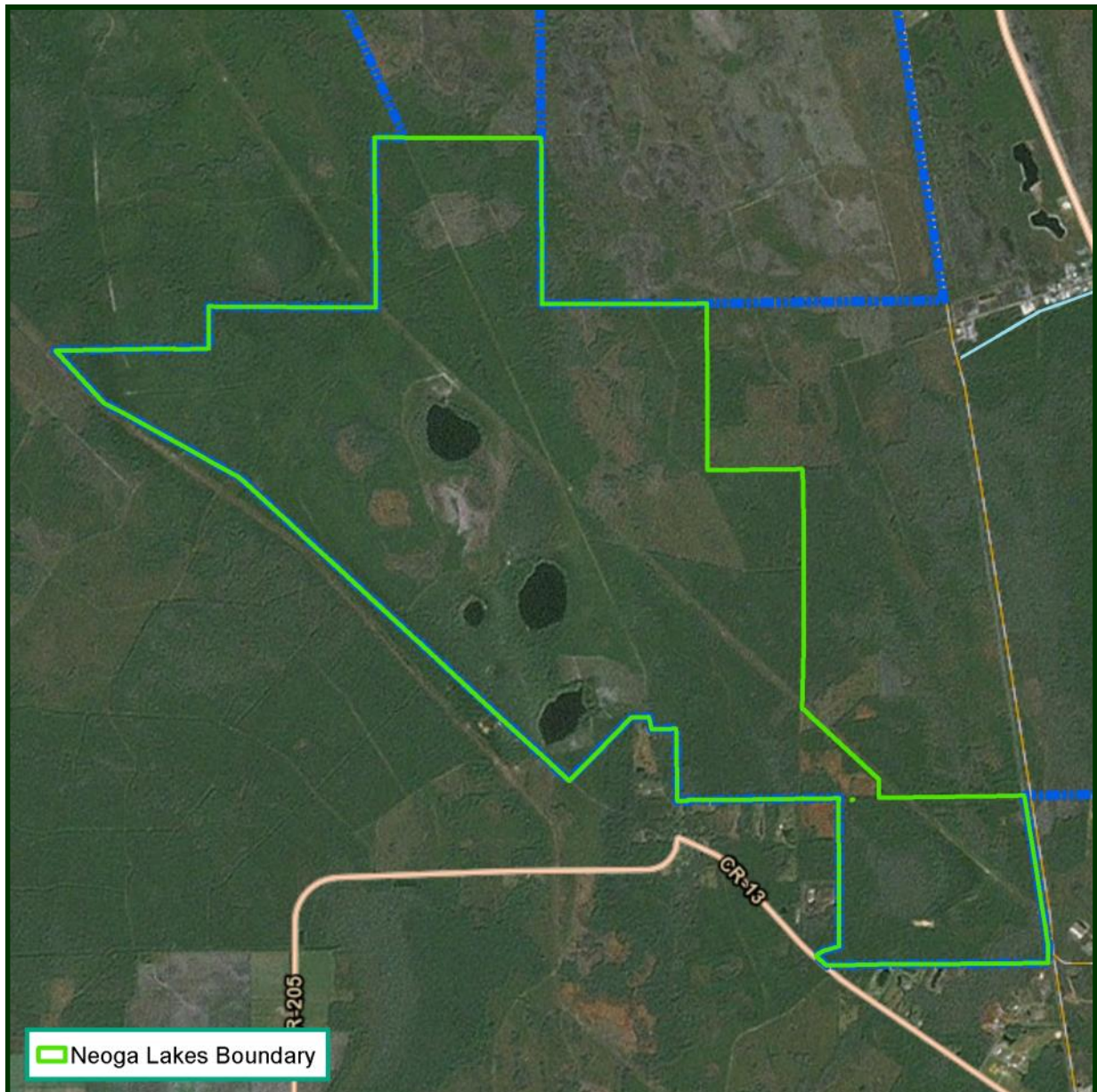


	Entitlement	Approved Development (Plats or DOs)	Building Permits Issued (Units or Sq. ft.)	Construction Completed (COs)
Residential	2,500 du	953	544	540
Retail/Comm/Office	4,800,000	1,015,268	760,614	747,499
Movie Theater	2,400 Seats	2,400	2,400	2,400
Lodging	480 rooms	327	327	327
Nursing Home	240 beds	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

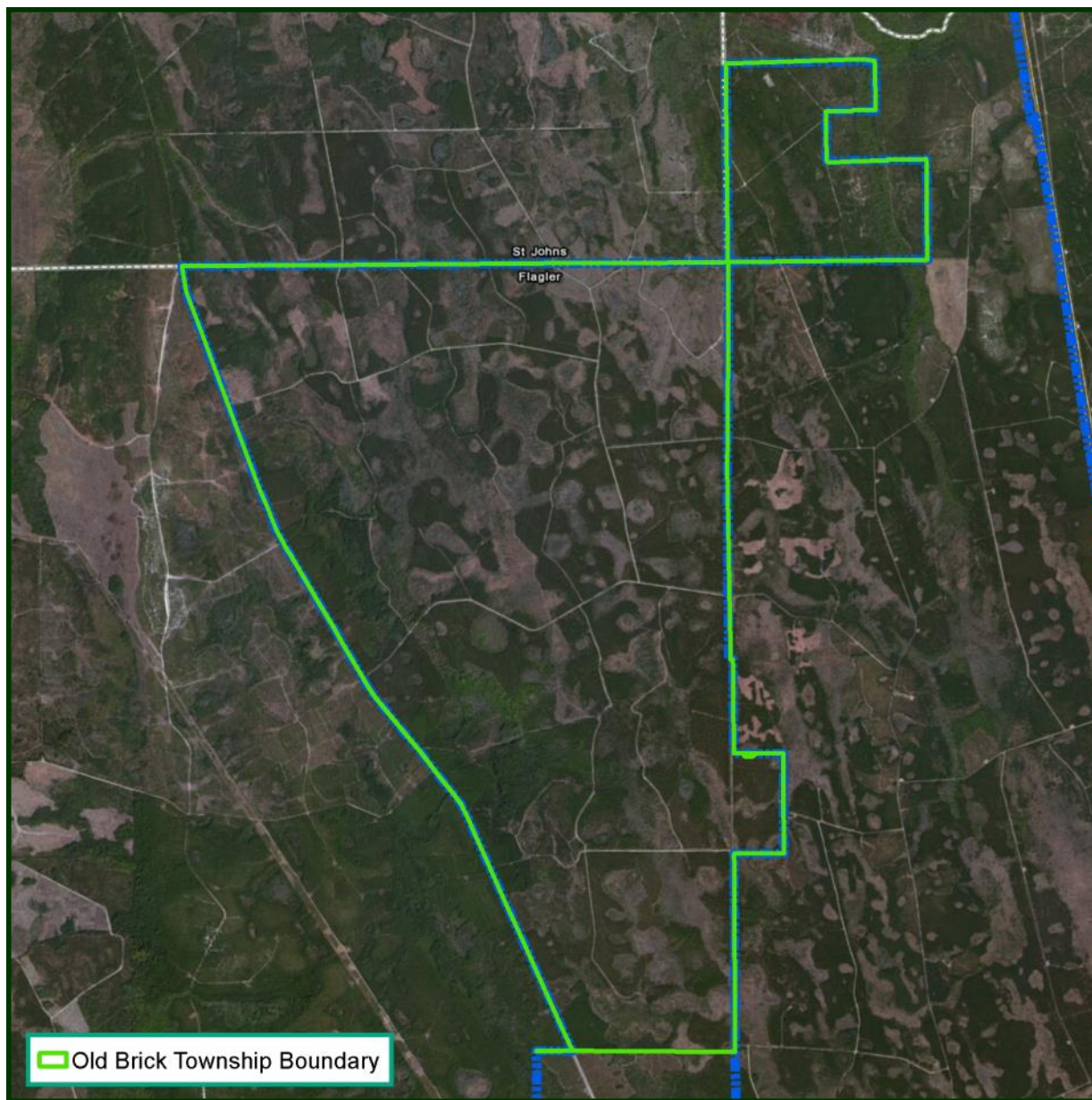


	ENTITLEMENT	Approved Development (Plats or DOs)	Building Permits Issued (Units or Sq. ft.)	Construction Completed (COs)
RESIDENTIAL	7,000 du	-	-	-
RETAIL USES	354,000 sf	-	-	-
OFFICE USES	45,000 sf	-	-	-
CIVIC USES	222,000 sf	-	-	-
EMPLOYMENT CENTER	1,870,000 sf	-	-	-

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	Approved Development (Plats or DOs)	Building Permits Issued (Units or Sq. ft.)	Construction Completed (COs)
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 processed the following Future Land Use Map Amendments or Zoning Map Amendments that would impact school capacity.

-Flagler Village— FLUM and Zoning Map amendment that allows up to 295 single family residential units.

-Palm Coast 145—FLUM and Zoning Map amendment that allows up to 450 dwelling units (this is a net increase from previous approval for 348 units).

-Seminole Palms—FLUM and Zoning Map amendment that allows up to 3 dwelling units on approximately 240 acres.

-Seminole Trails--FLUM and Zoning Map amendment that allows up to 227 dwelling units.

CONVERSION OF RESIDENTIAL UNITS

The City did not review any conversions or redevelopment of residential units in 2021.

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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