

Hillsborough County Population and Employment Projections and Allocations

DECEMBER 2017



Hillsborough County
City-County
Planning Commission



Presentation Overview

- Overview of the Allocation Process
- Population and Employment Projections
- Trend Analysis
- 2045 Trend and Scenario Analysis
- Next Steps



Overview of the Allocation Process

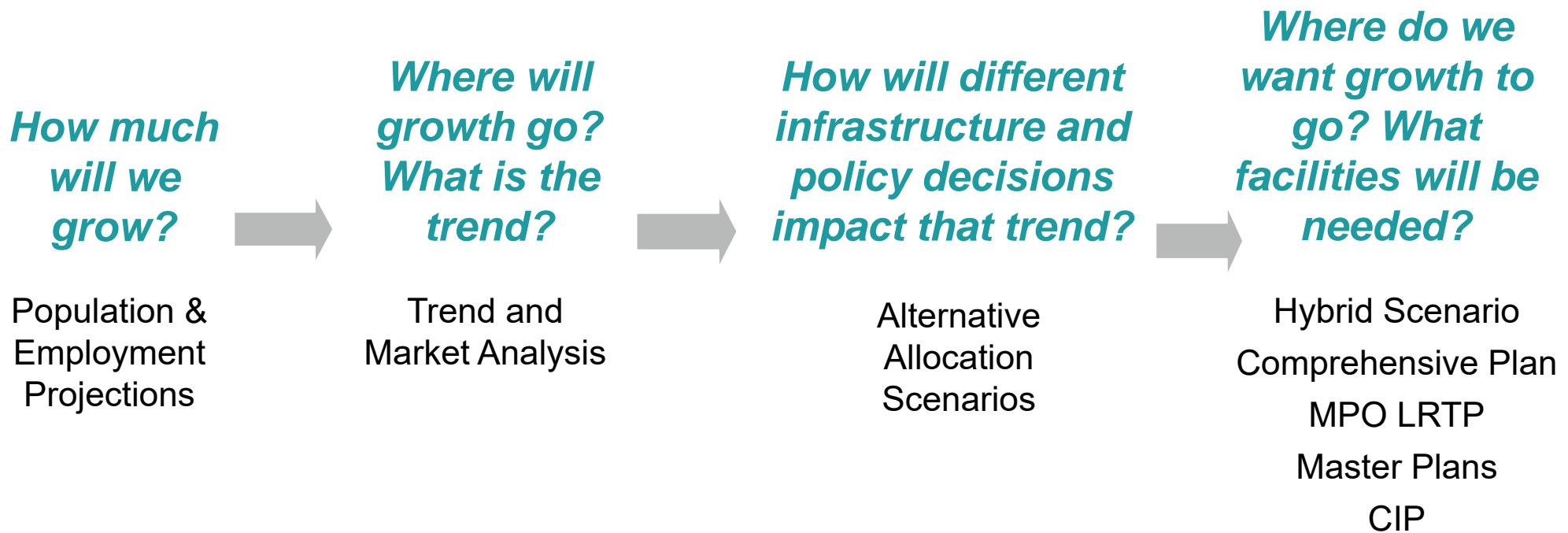
Population and Employment Allocation

- Update the projections, horizon date and underlying assumptions
- Understand recent demographic trends and how they may impact Hillsborough County in the future
- Grounded in a real estate market analysis
- Look at scenarios of how policy and infrastructure changes impact where population and jobs go
- Input from all 4 local governments throughout

Results

- Trend analysis of demographic shifts and market and real estate forecasts
- Assessment of scenarios for whether they achieve our goals:
 - Quality of Life
 - Fiscal Sustainability
 - Economic prosperity
 - Responsible Growth
 - Consistency of Action
- Updated population and job projections to be utilized for future planning efforts

Population and Employment Allocation



An aerial photograph of a city grid with various colored overlays in yellow, red, blue, and green, likely representing different land use zones or data points. The text is overlaid on this map.

Population and Employment Projections

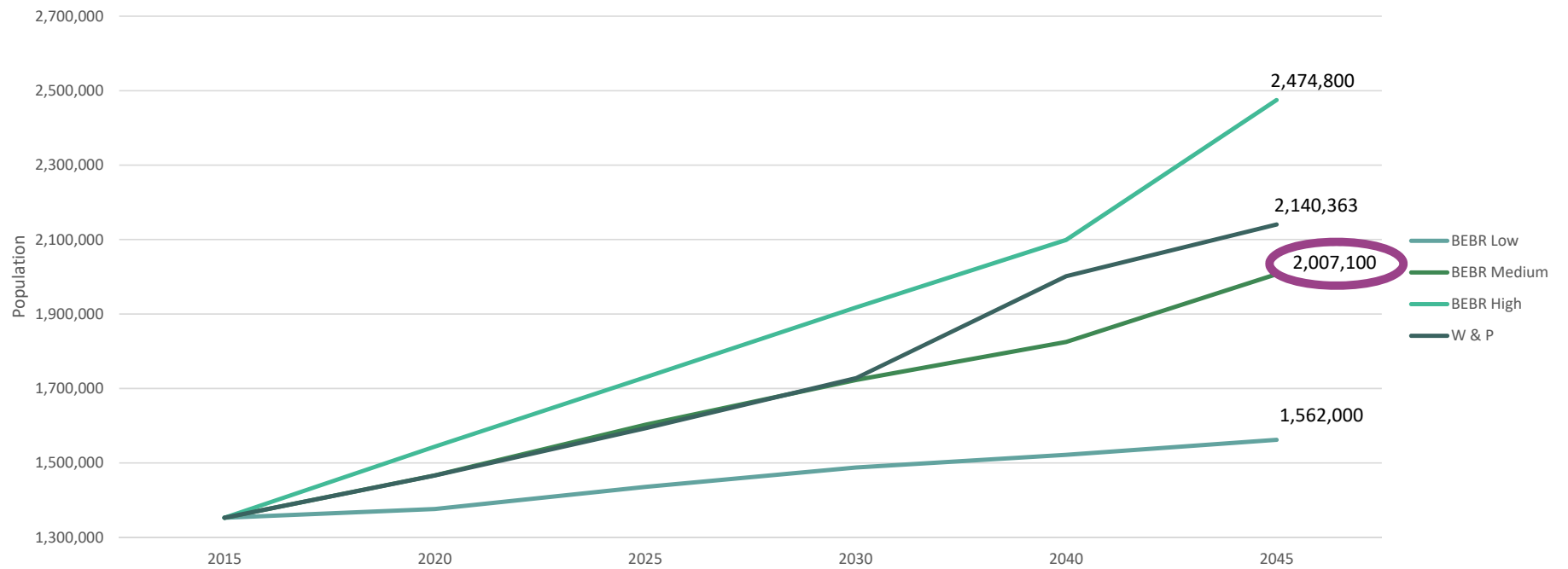


Control Totals

- Projected population and employment for 2045 as well as interim years
- Allows us to compare different scenarios in a uniform way
 - Can we accommodate that growth? Do we want to? How? Where?
- Conditions change = plans and projections change

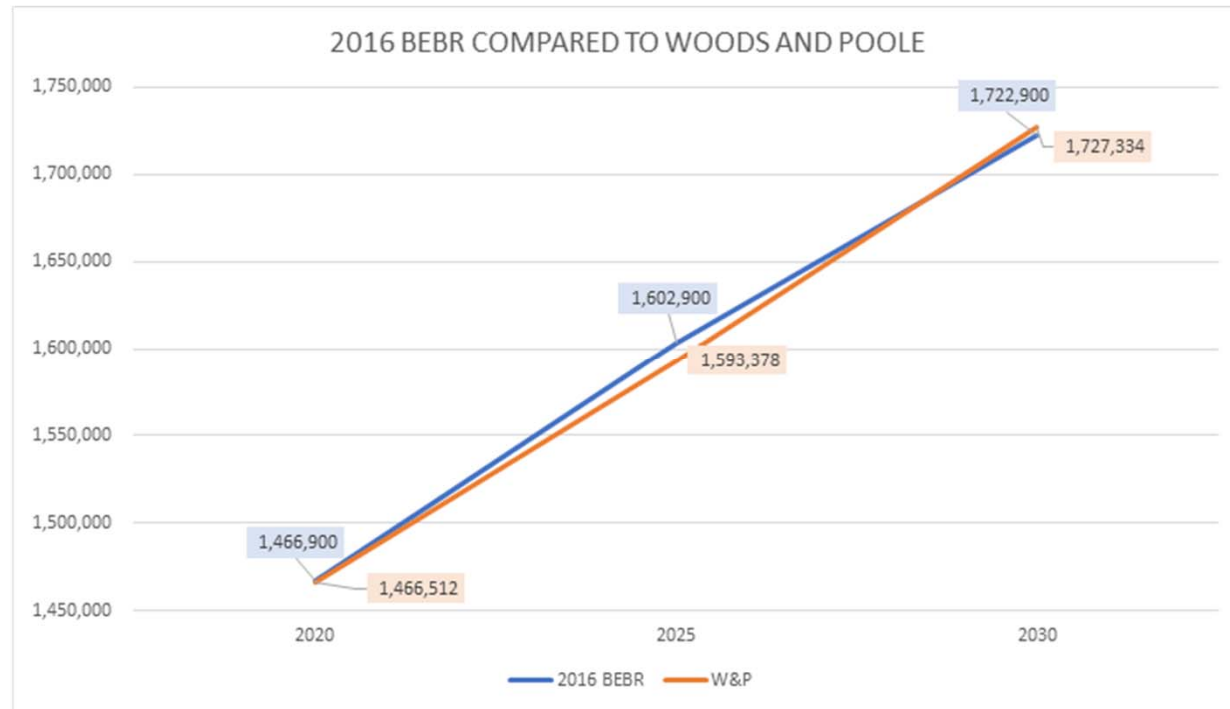
Population

2045 Population Projections



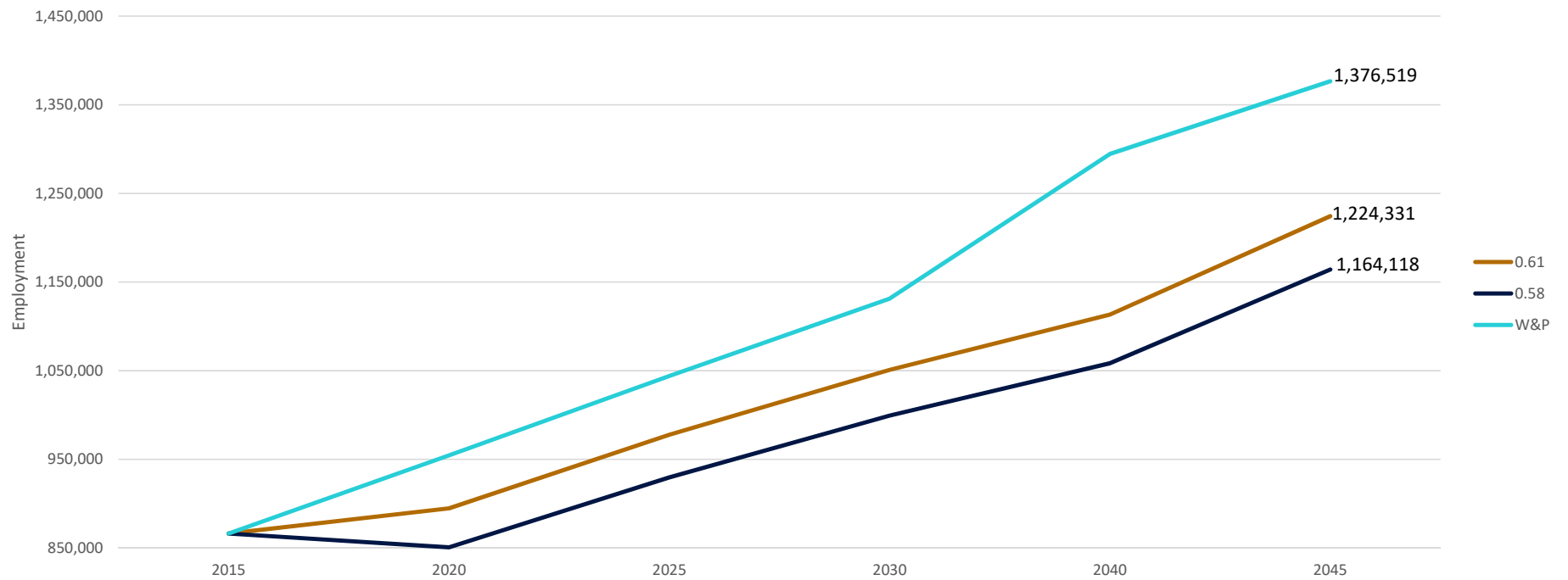
Shorter Term Projections

	2020	2025	2030
BEBR	1,466,900	1,602,900	1,722,900
W&P	1,466,512	1,593,378	1,727,334



Employment

2045 Employment Projections



An aerial photograph of a city grid with various colored overlays. The colors include yellow, red, blue, green, and white, likely representing different land use zones or data points. The text 'Trend Analysis' is overlaid on the map in a large, black, sans-serif font.

Trend Analysis



Trend Analysis

- Based on historical growth trend
- Follows Future Land Use Plan/Map
- Supported by building permit data
- Considers latest demographic data
- Real estate market analysis consultant review
- Draft data/maps attached

An aerial photograph of a city grid with various colored overlays in yellow, red, blue, and green, likely representing different land use zones or planning scenarios. The text is overlaid on this map.

2045 Trend and Scenario Analysis

2045 Trend and Scenario Analysis

- What do you want to get out of it?
- Test and update assumptions from Imagine 2040
- Test impact of different infrastructure decisions

An aerial photograph of a city grid with various colored overlays. Yellow covers most of the area, with red, blue, and green patches scattered throughout. A prominent road with a loop is visible on the left side. The text 'Next Steps' is overlaid in the center of the map.

Next Steps



Timeline

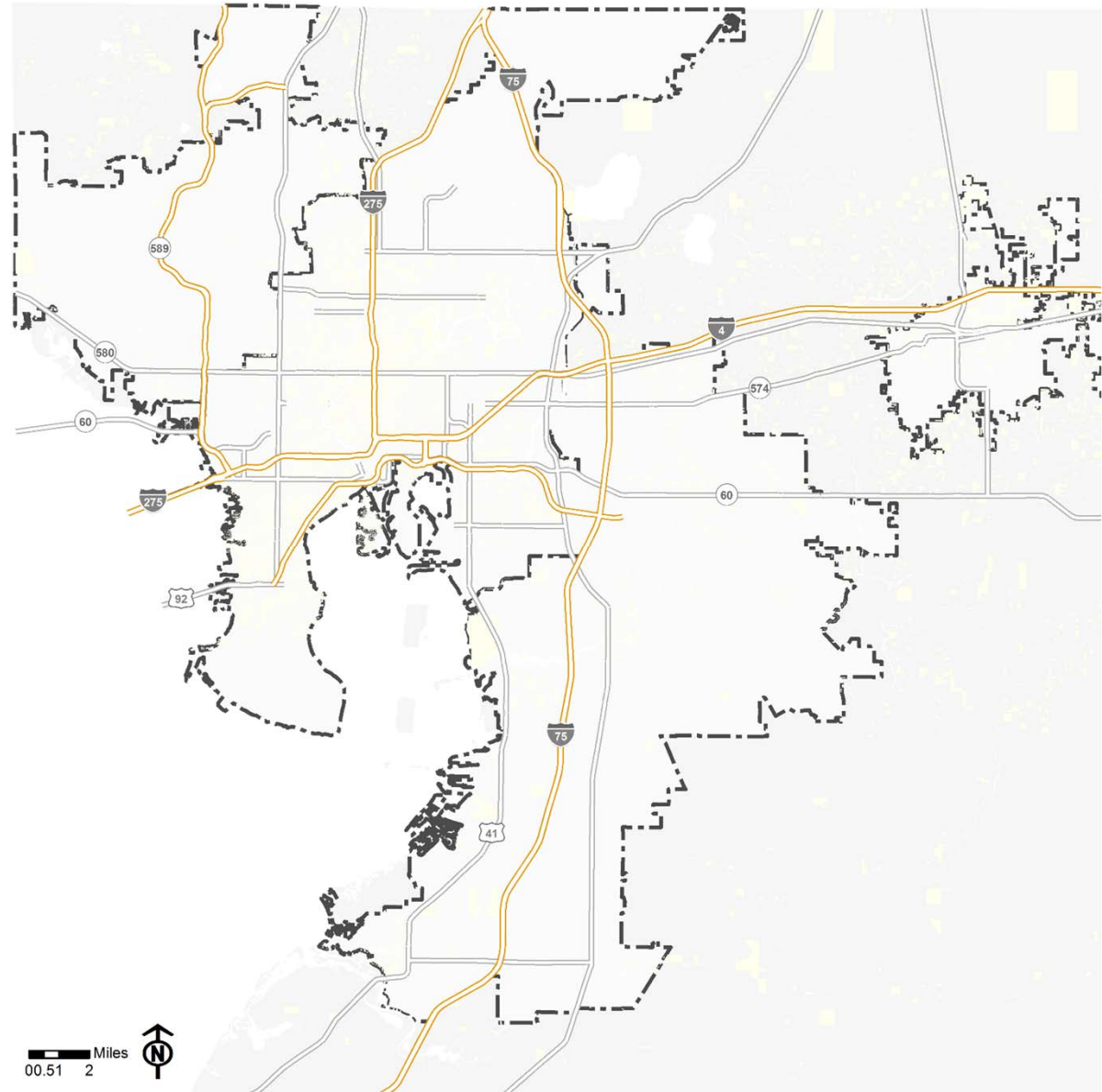
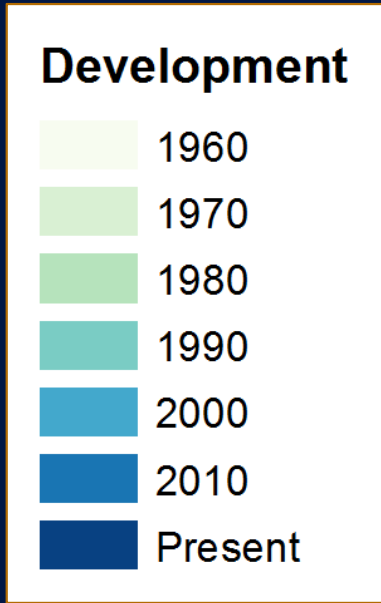
- Trend and Market Analysis – early 2018
- Alternative Scenarios – Spring 2018
- Outreach – Summer 2018
- Hybrid Scenario – Fall 2018

An aerial photograph of a residential or commercial area, overlaid with a grid of colored polygons in yellow, red, blue, and green, representing different land use or trend analysis zones. The text is centered over this map.

Attachments – Draft Trend Analysis Maps

Land Use Trends

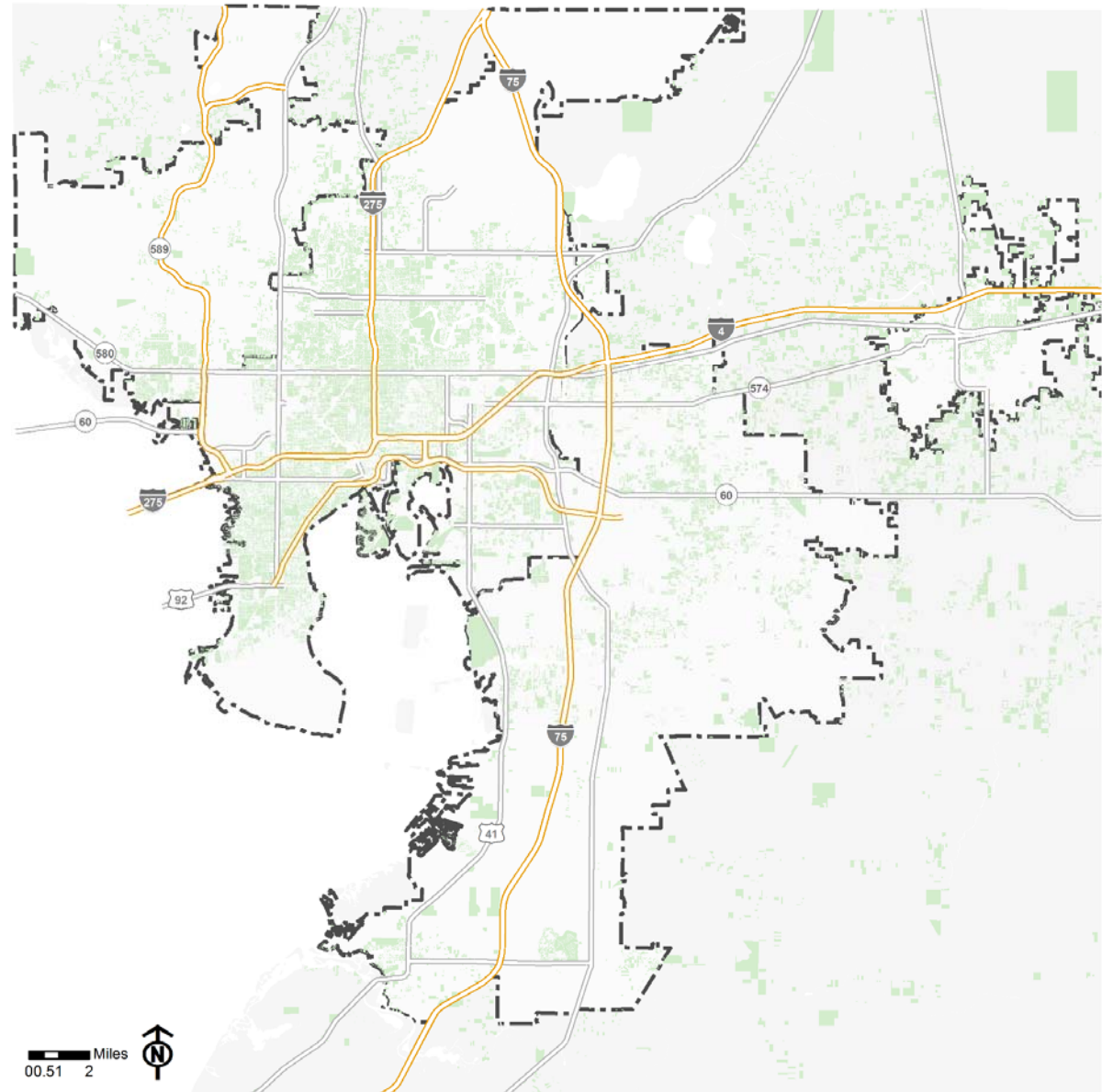
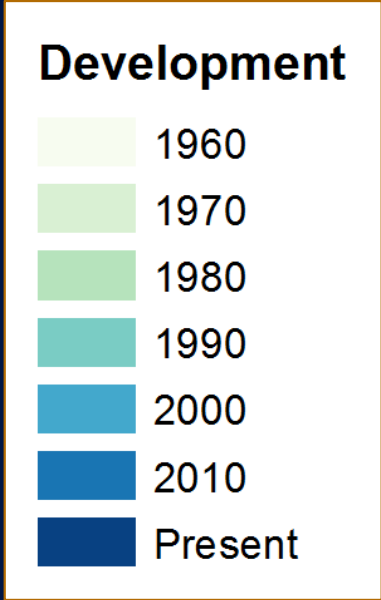
Developed land: 1960



Source: Hillsborough County MPO

Land Use Trends

Developed land: 1970



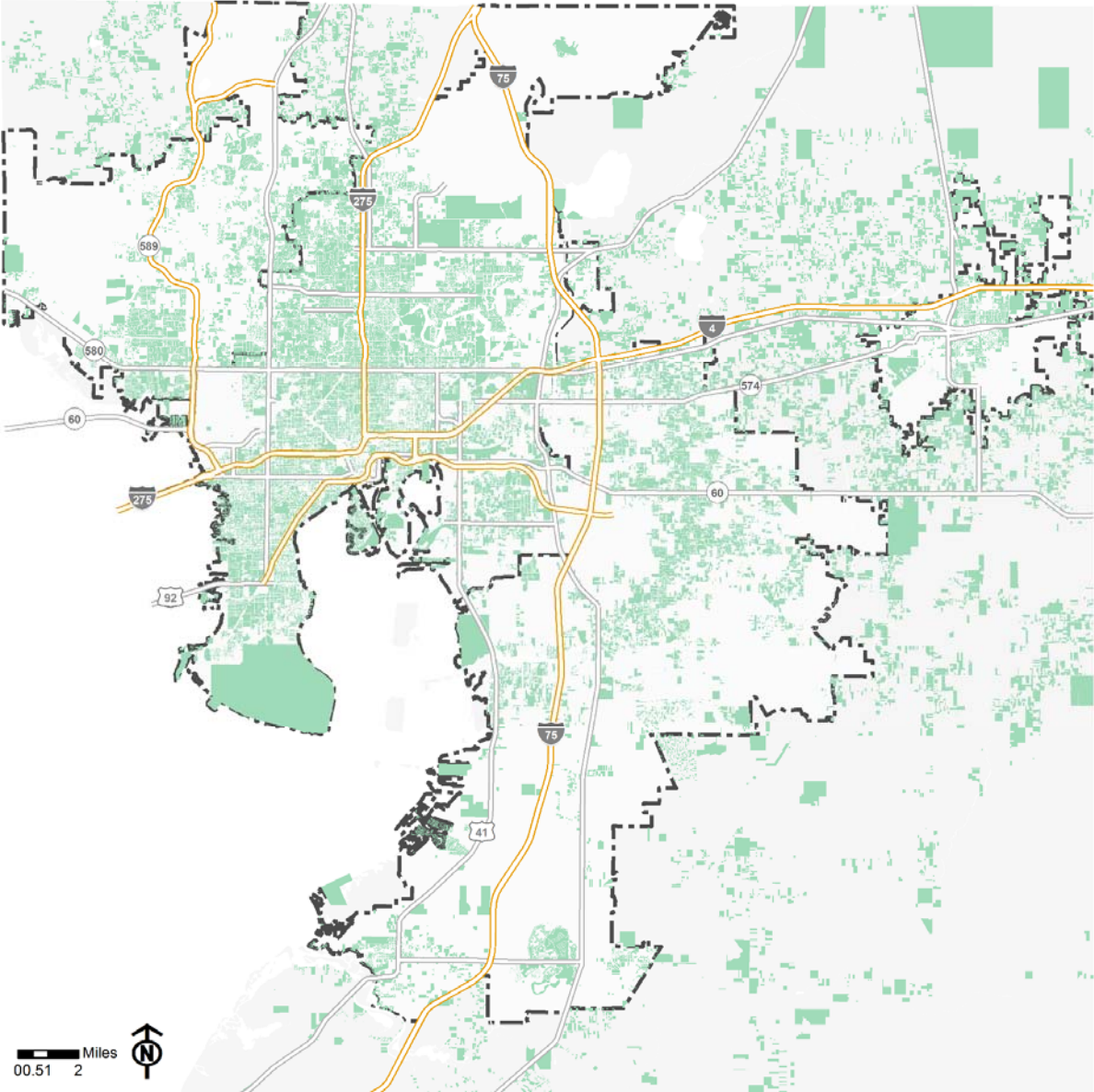
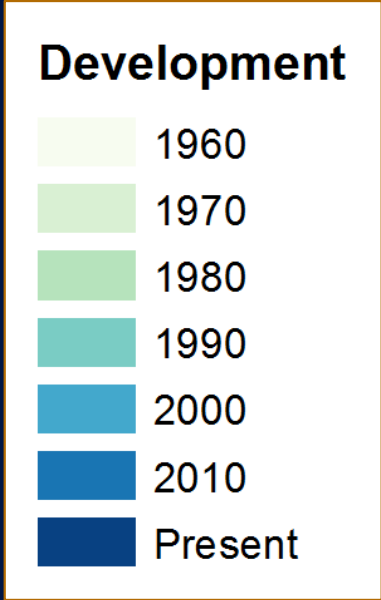
Source: Hillsborough County MPO



2045 Population and Employment Projections

Land Use Trends

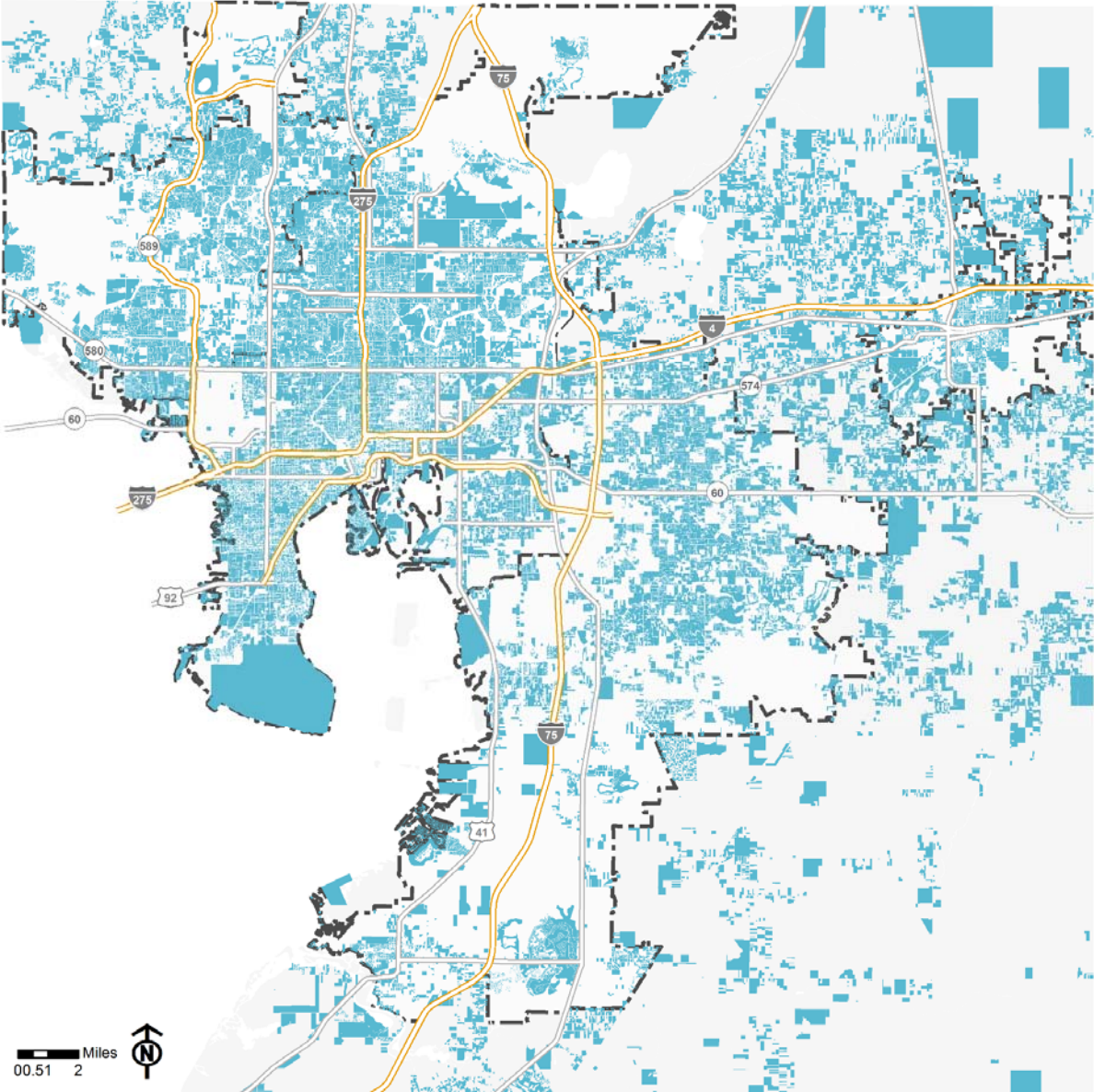
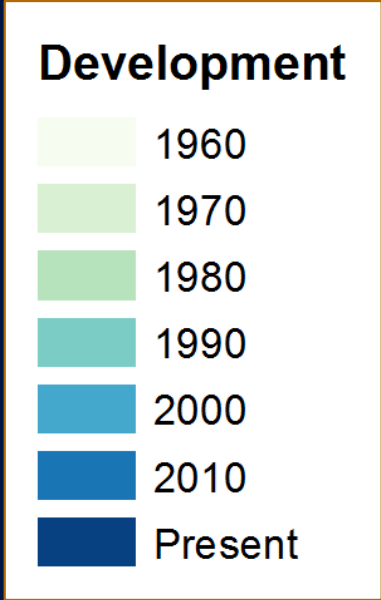
Developed land: 1980



Source: Hillsborough County MPO

Land Use Trends

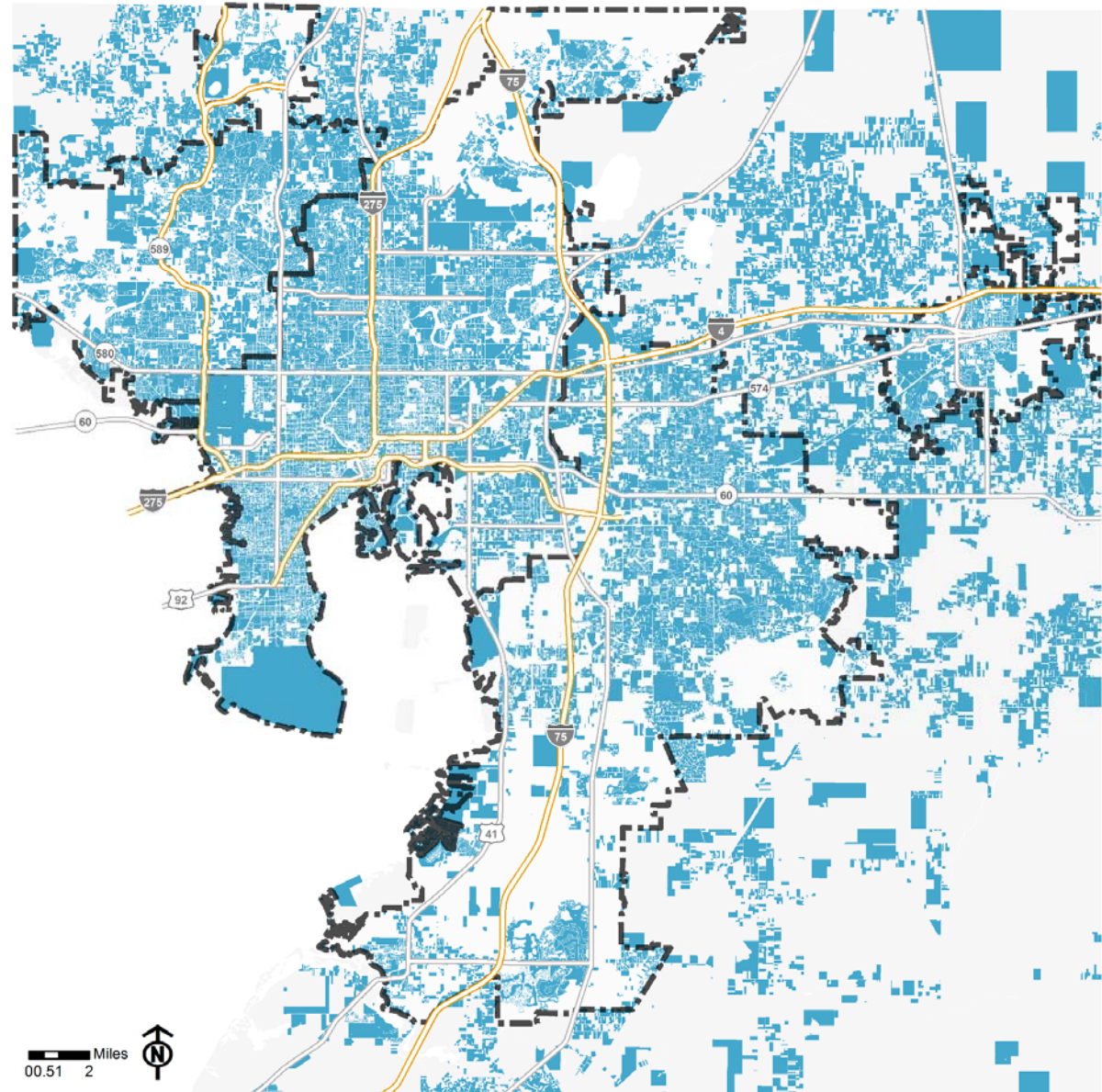
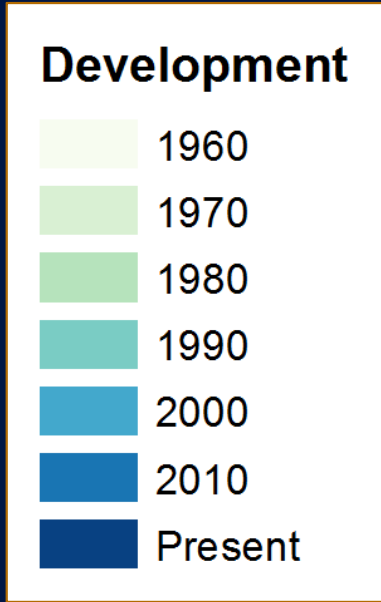
Developed land: 1990



Source: Hillsborough County MPO

Land Use Trends

Developed land: 2000



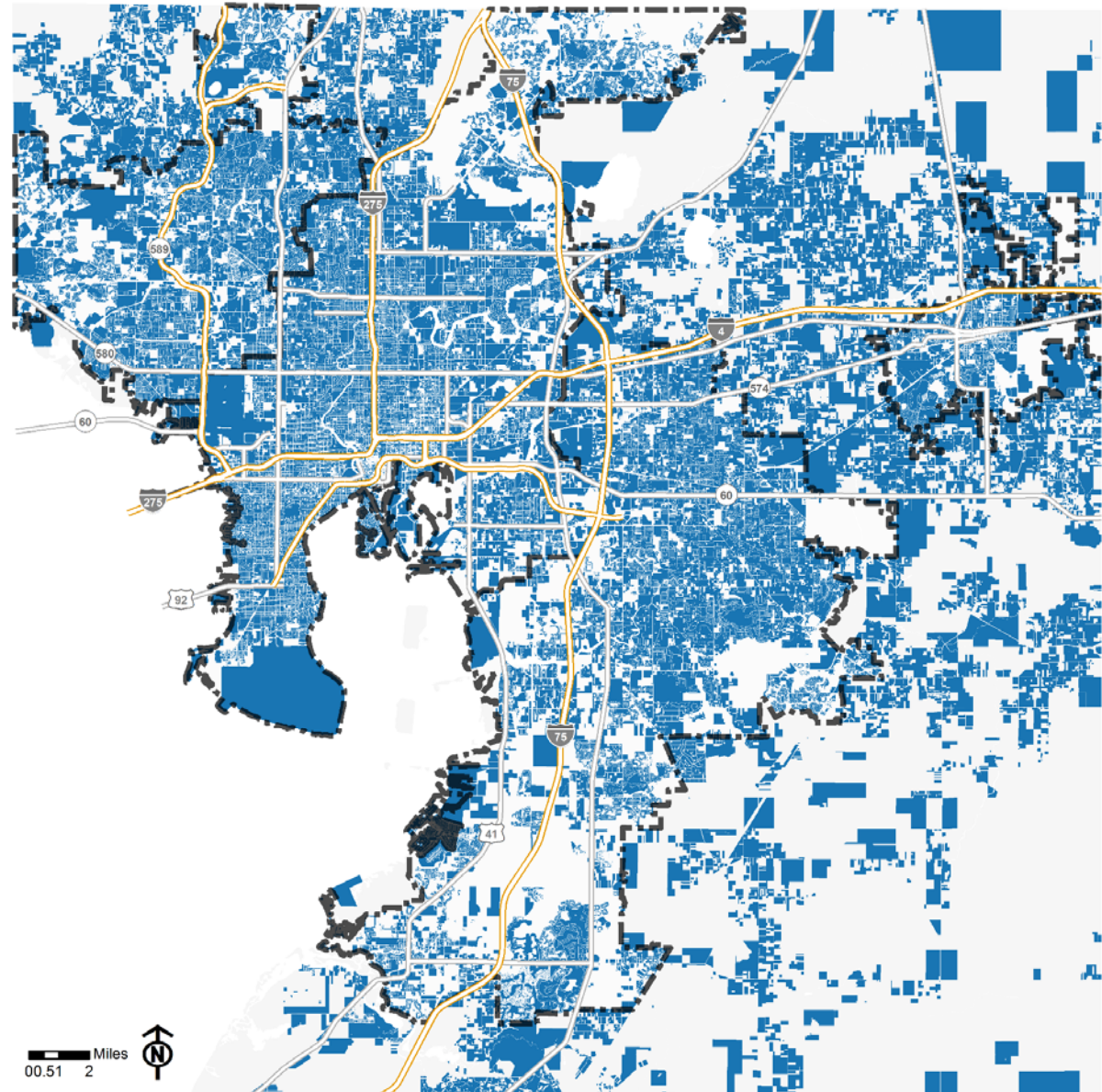
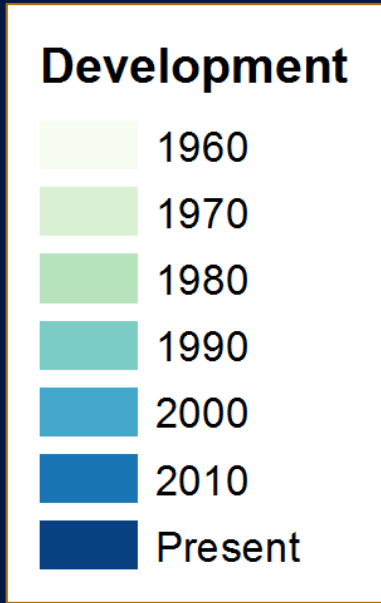
Source: Hillsborough County MPO



2045 Population and Employment Projections

Land Use Trends

Developed land: 2010



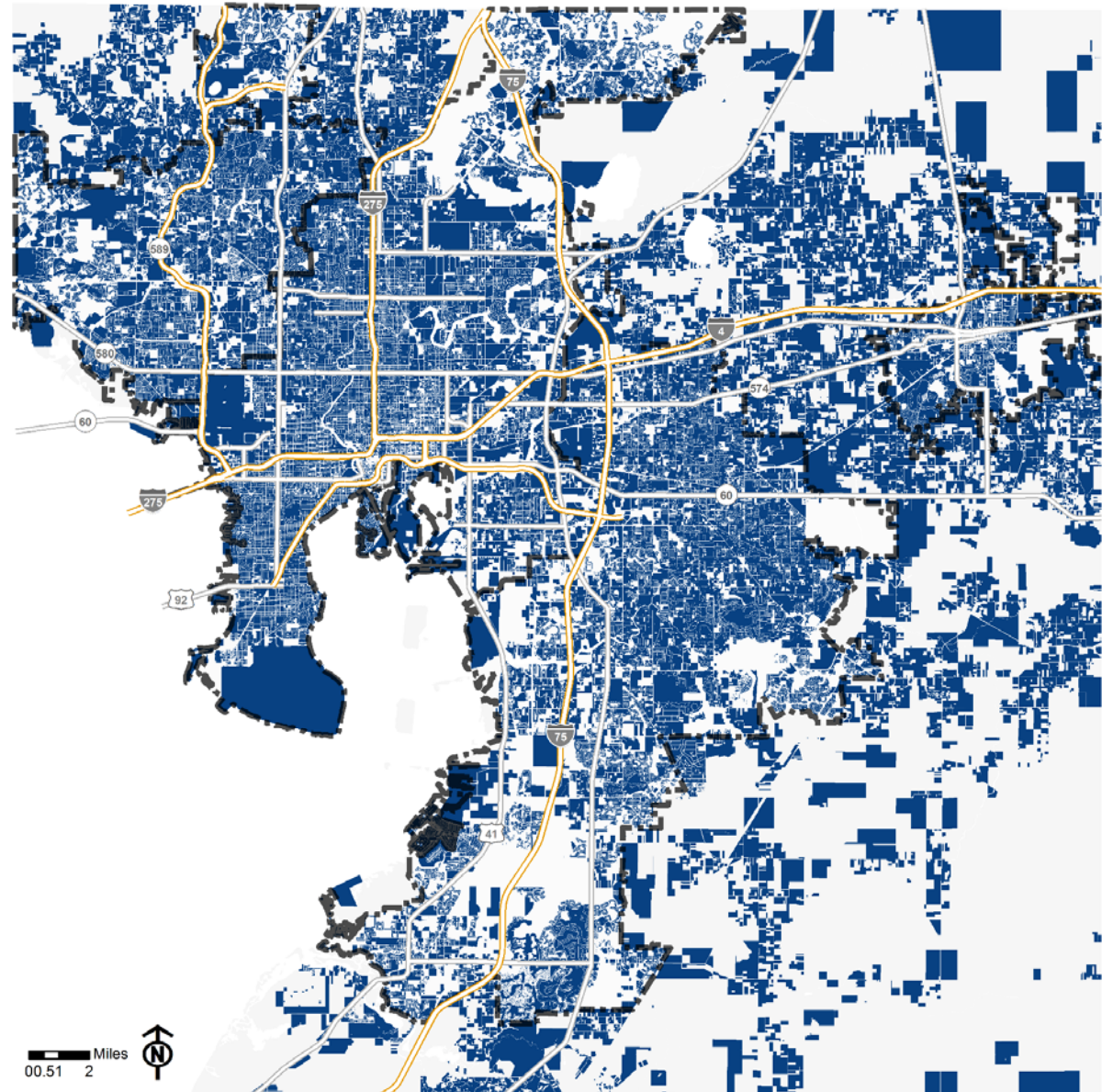
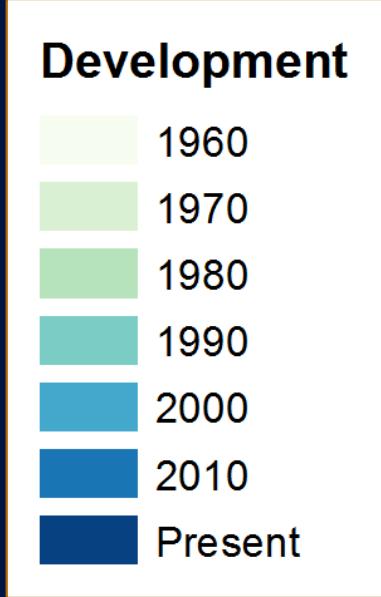
Source: Hillsborough County MPO



2045 Population and Employment Projections

Land Use Trends

Developed land: Present



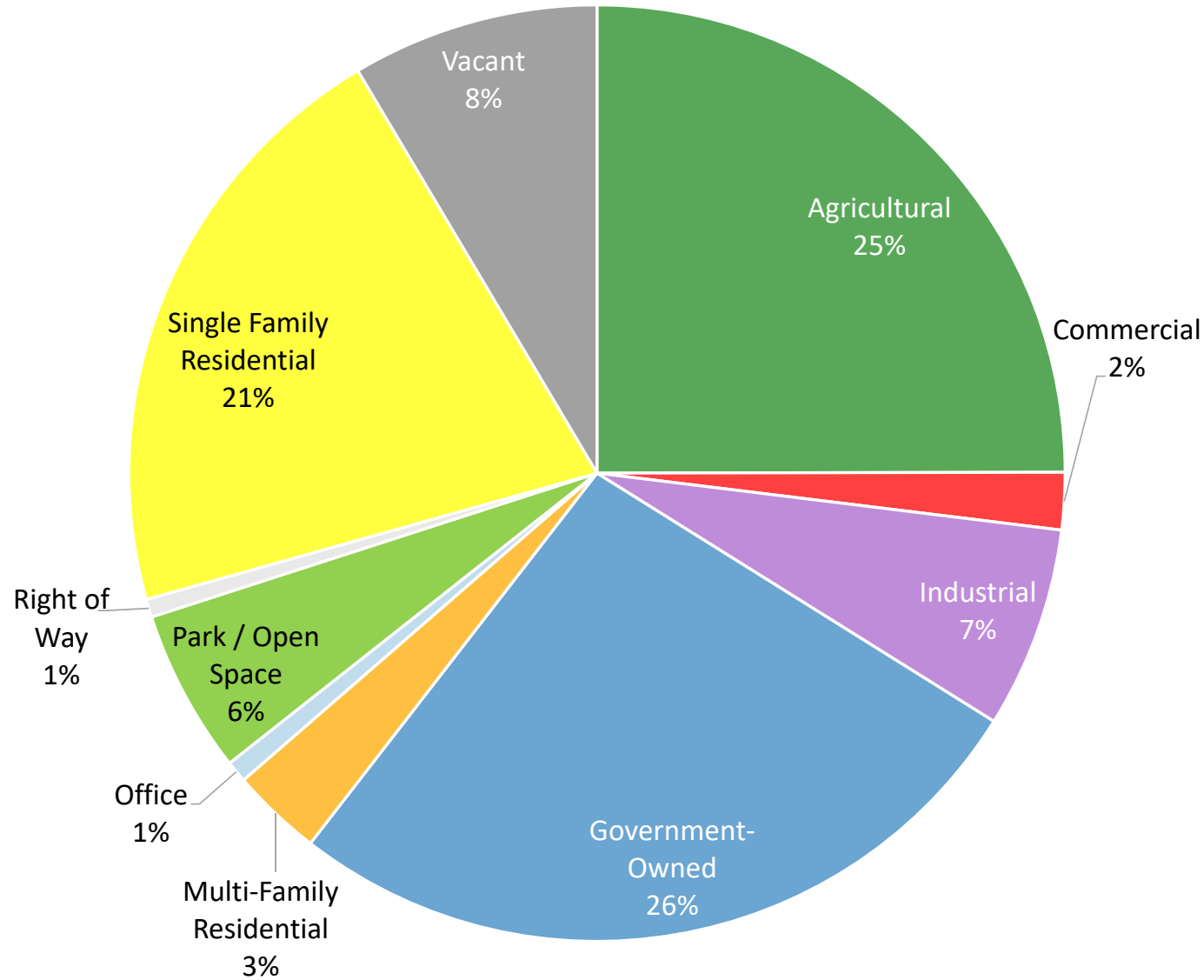
Source: Hillsborough County MPO



2045 Population and Employment
Projections

Land Use Trends


County Land Use



Source: Hillsborough County MPO



2045 Population and Employment Projections

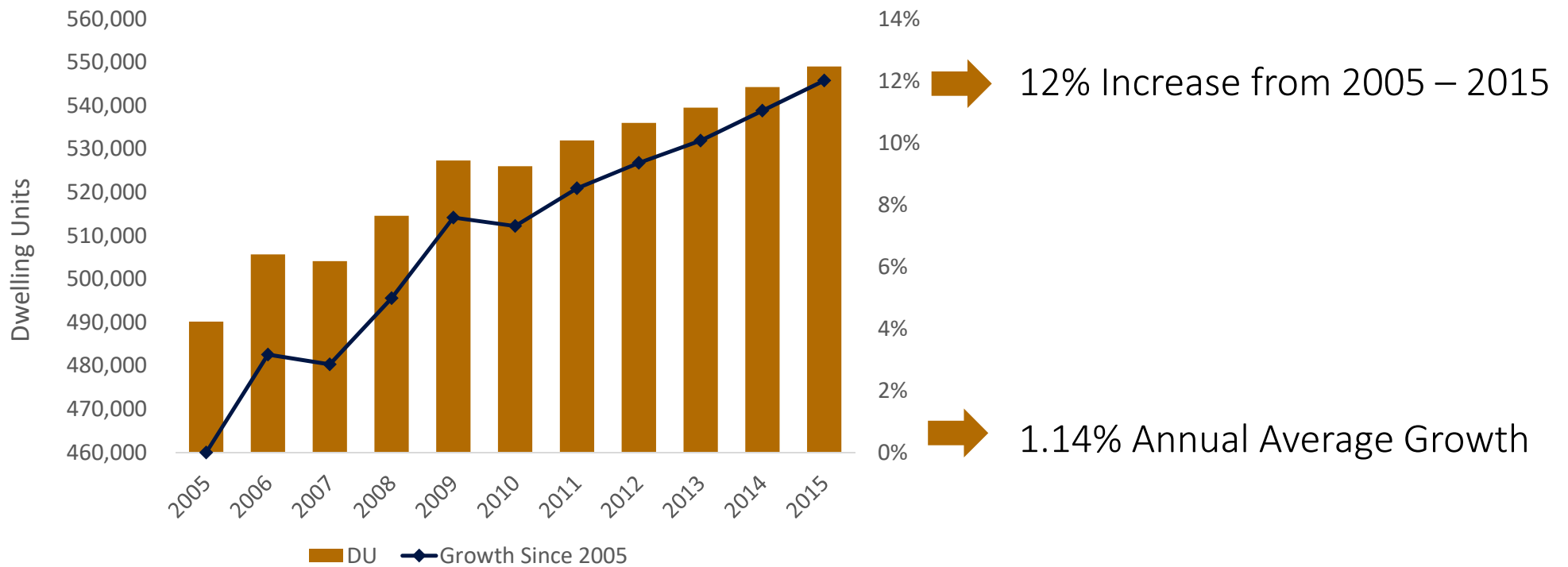


Residential: Key Findings

- Steady, continuous growth
- Trend toward smaller lot sizes
- Unit type balance remains constant
- Seasonal housing is concentrated in the south

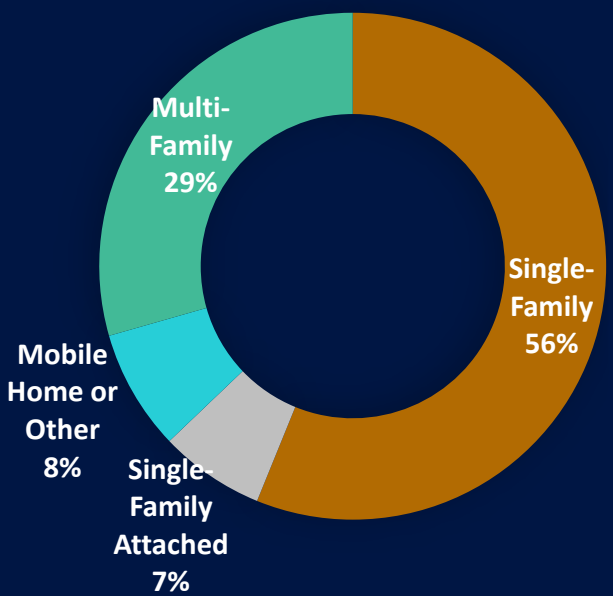
Residential Growth Trends

Dwelling Units



Residential Growth Trends

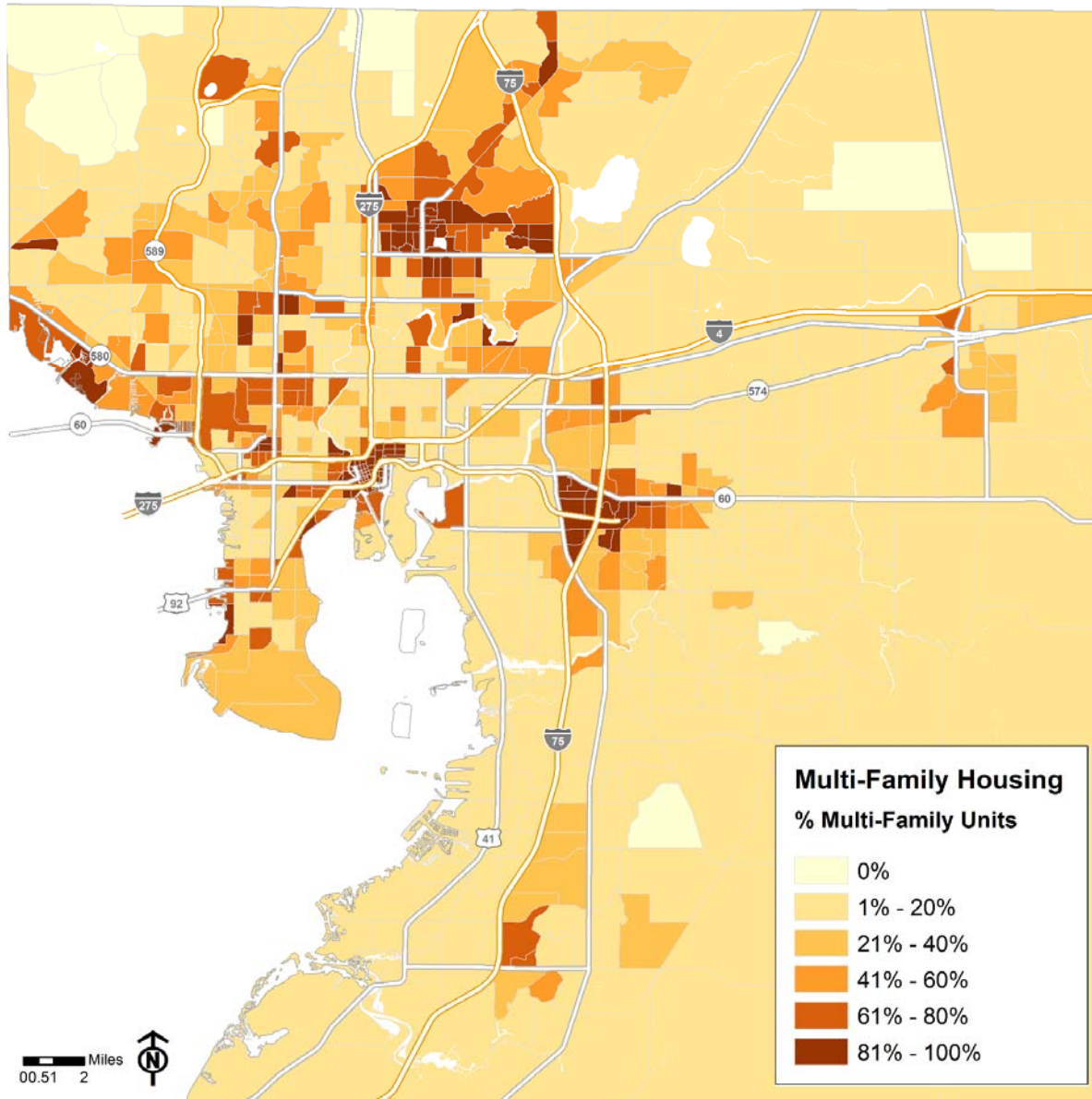
Housing Type



Source: U.S. Census Bureau, 2011-2015 American Community Survey 5-Year Estimates

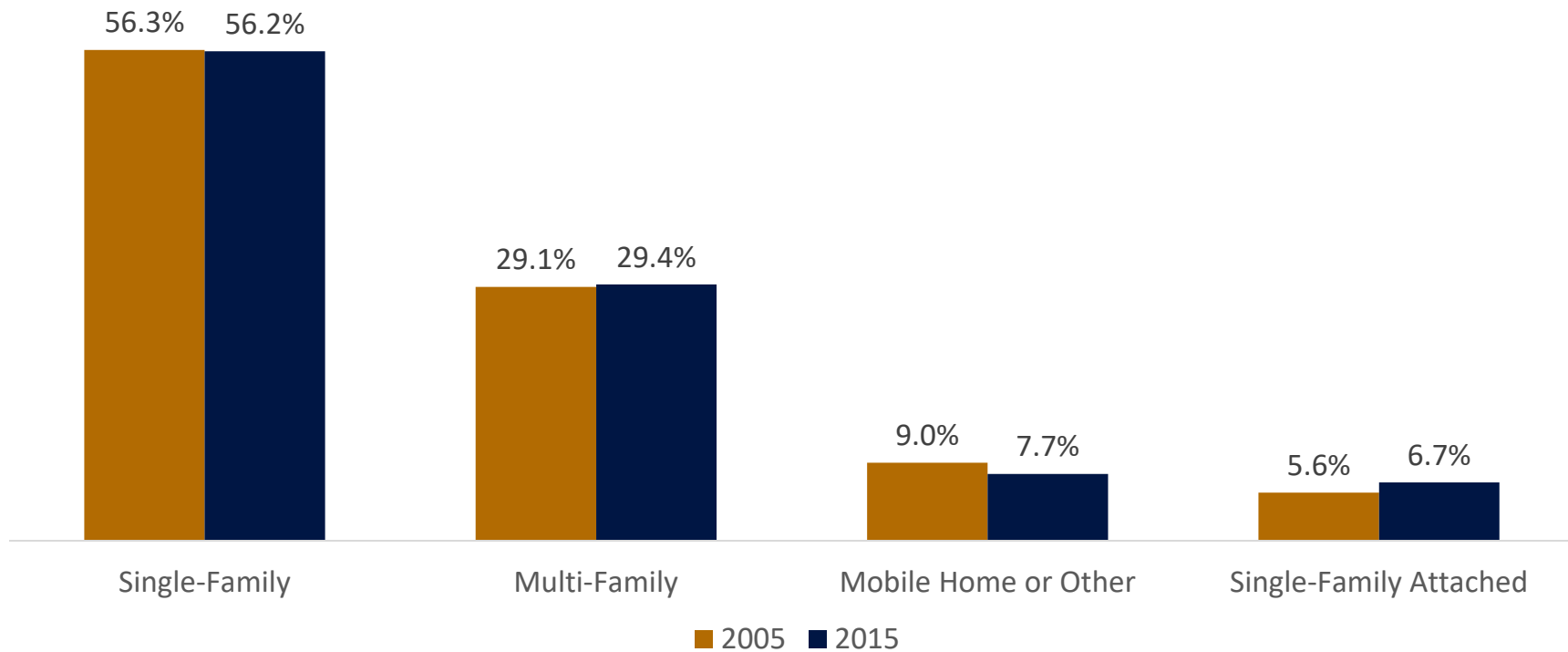


2045 Population and Employment Projections



Residential Growth Trends

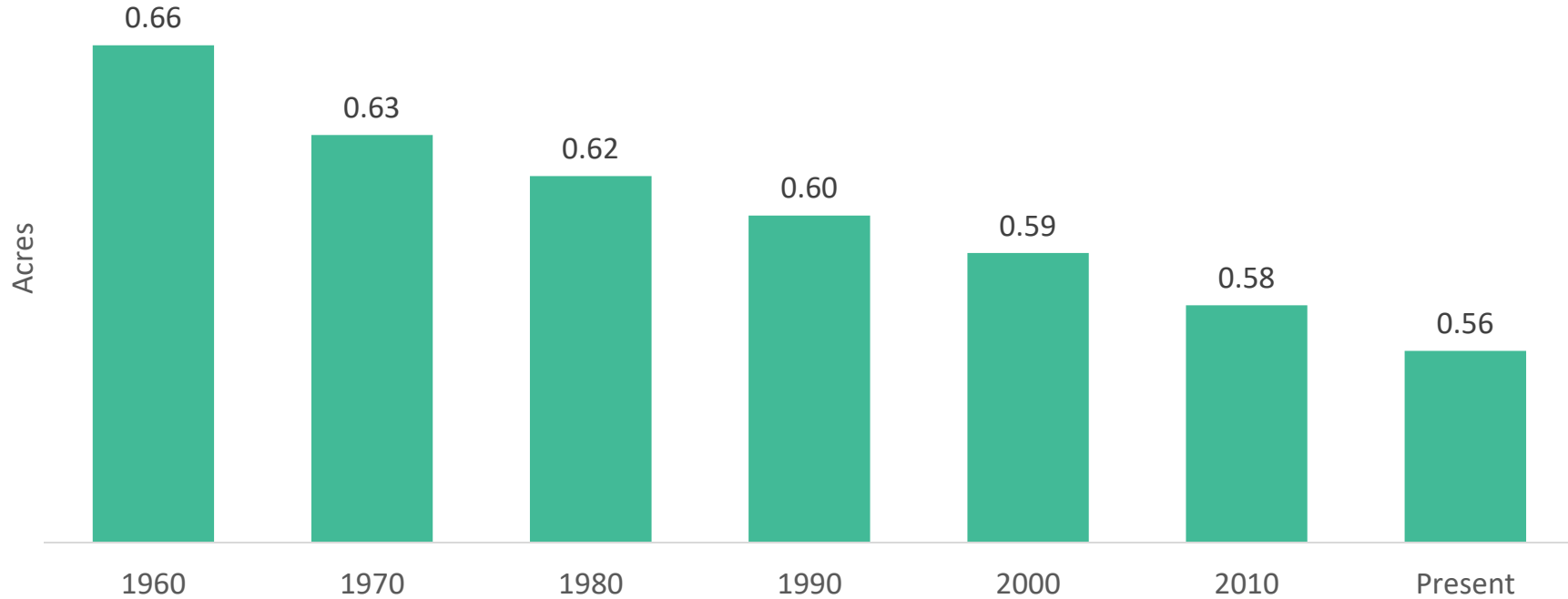
Housing Type



Source: U.S. Census Bureau, 2011-2015 American Community Survey 5-Year Estimates

Residential Growth Trends

Single-Family Residential Lot Size - Countywide



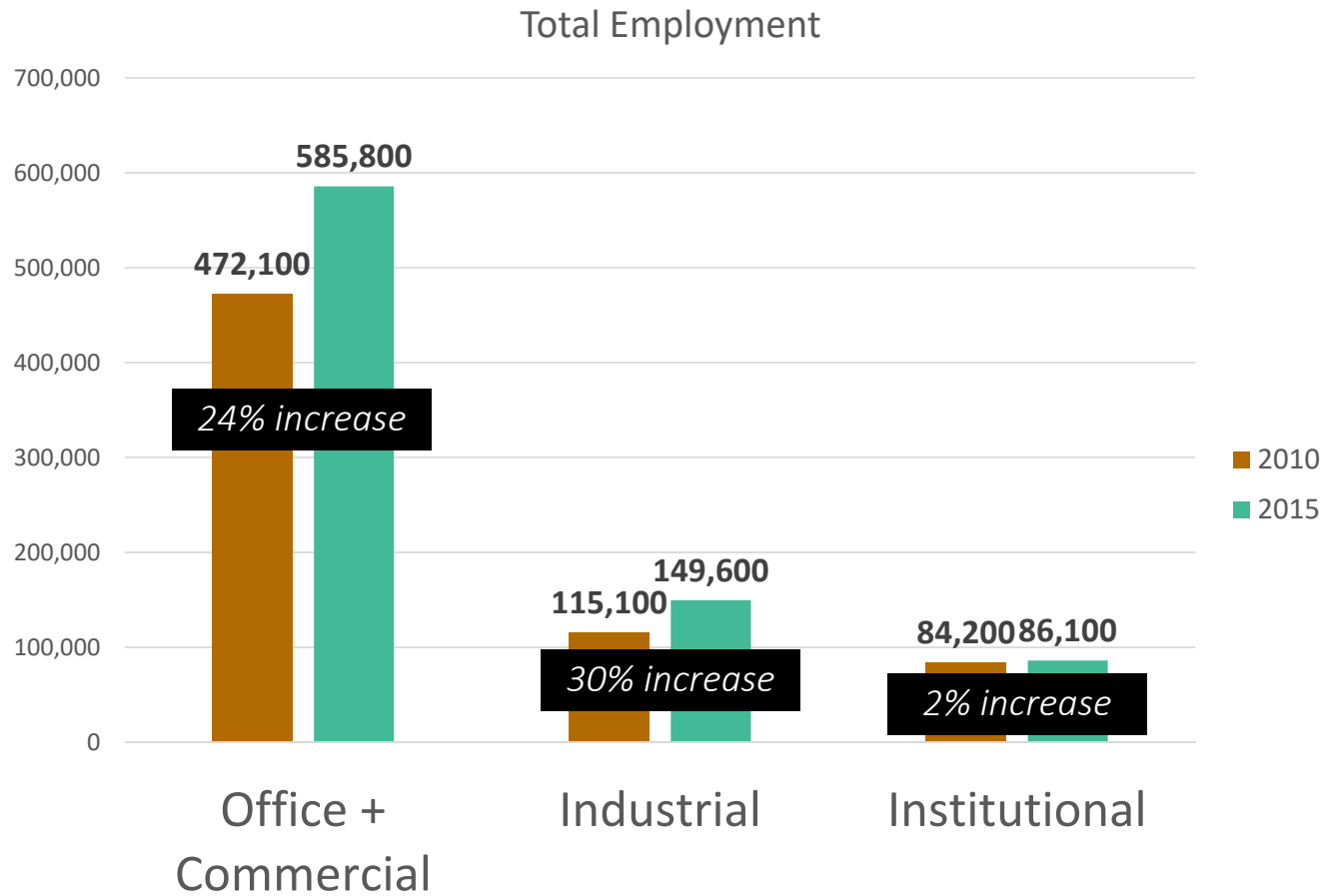
Source: Hillsborough County MPO

Employment and Activities: Key Findings

- Bulk of employment is in professional, office, services, retail
- Strong growth in employment since 2010
- Strong growth in floor space since 2000, leveling off in 2010
- Employee space utilization is becoming more efficient
- FAR has leveled off

Employment Growth Trends

Total Employment



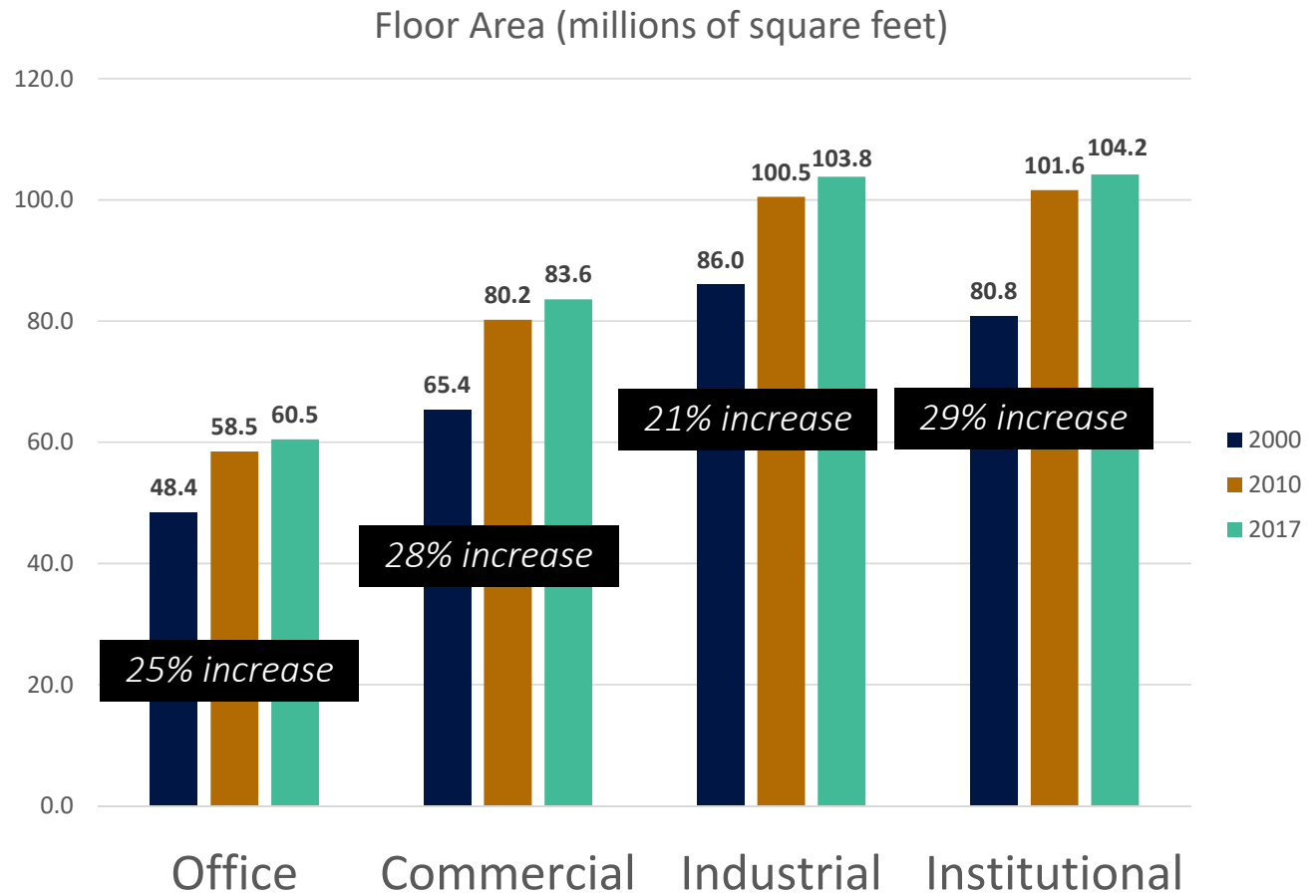
Census Bureau, Florida Department of Economic Opportunity, Bureau of Economic Analysis.
Heated square footage reported in Hillsborough County Property Appraiser parcel database.



2045 Population and Employment Projections

Employment Growth Trends

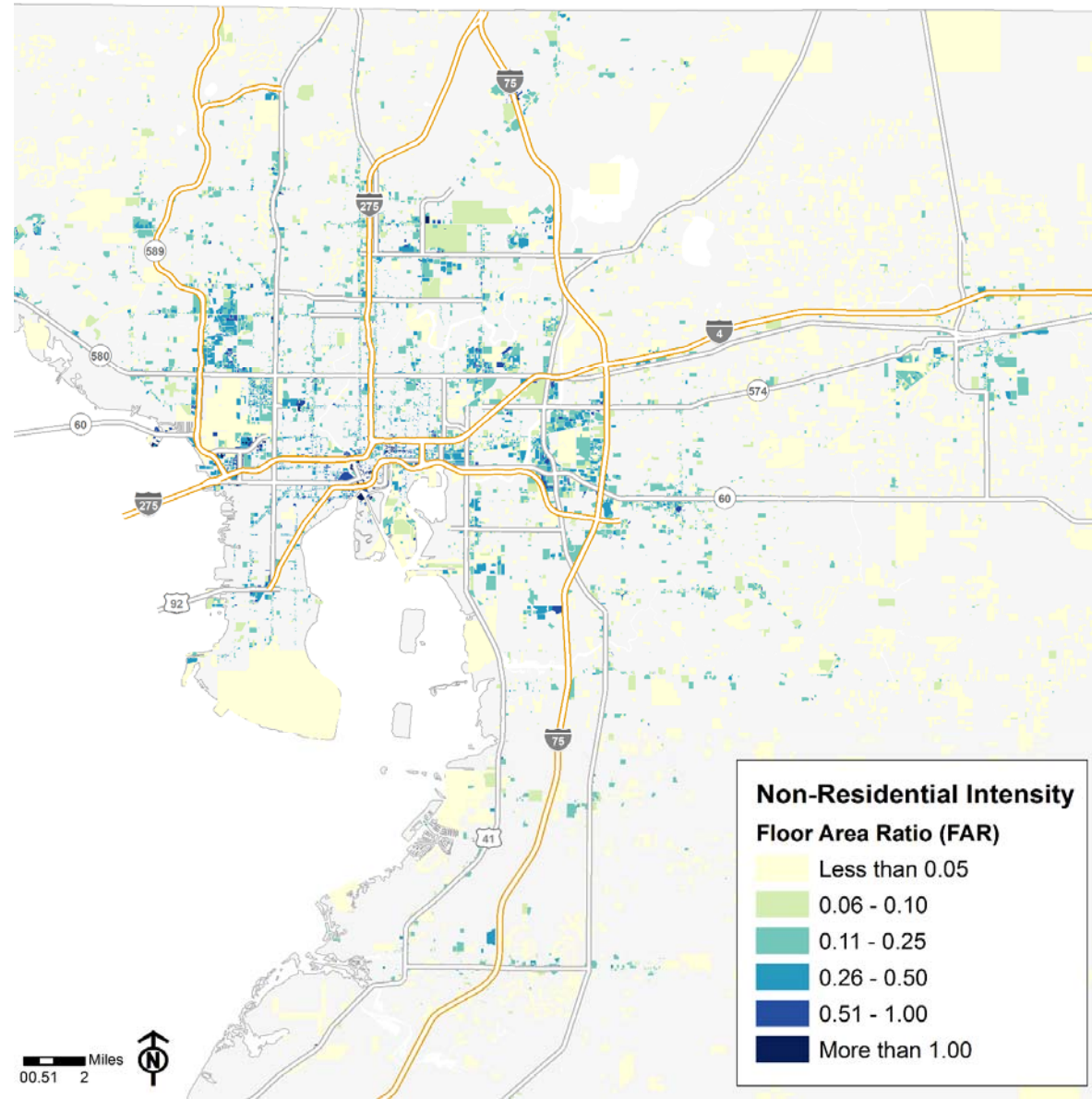
Floor Area
(millions of square feet)



Census Bureau, Florida Department of Economic Opportunity, Bureau of Economic Analysis.
Heated square footage reported in Hillsborough County Property Appraiser parcel database.

Employment Growth Trends

Non-Residential Intensity (FAR)



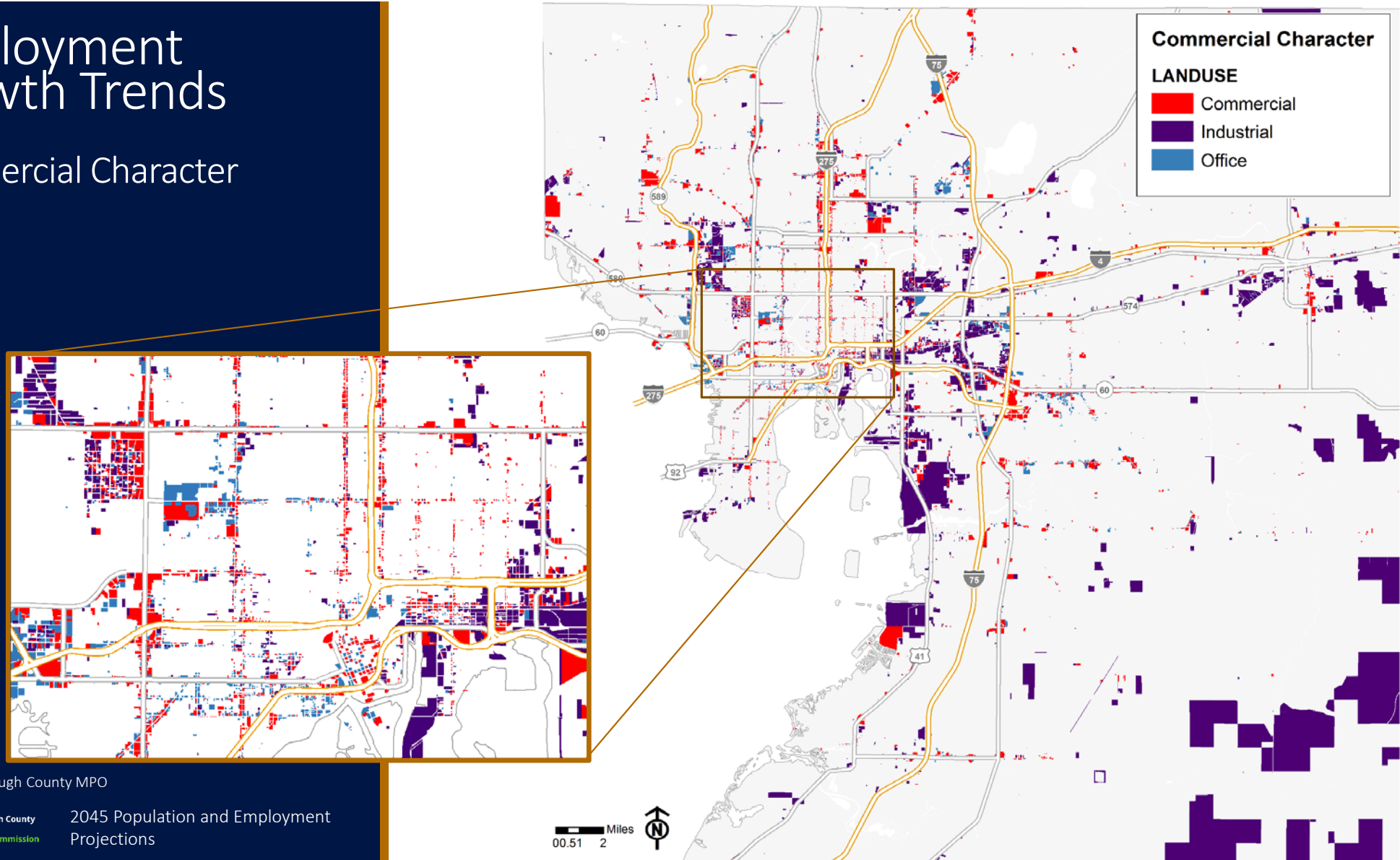
Source: Hillsborough County MPO



2045 Population and Employment Projections

Employment Growth Trends

Commercial Character



Commercial Character

LANDUSE

- Commercial
- Industrial
- Office



Source: Hillsborough County MPO



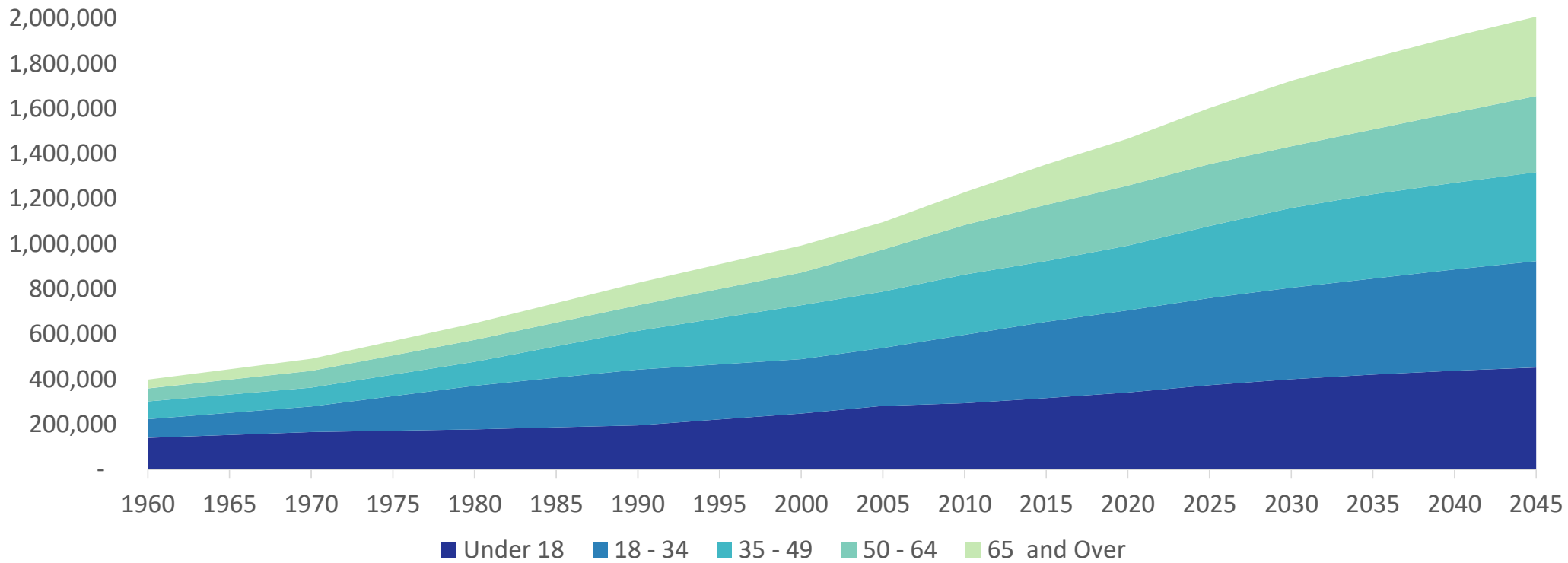
2045 Population and Employment Projections

Population and Demographic Trends: Key Findings

- Hillsborough population share is stable
- Pasco's share is growing, Pinellas declining
- The county is trending older
- Much larger share of millennials in multi-family housing
- Average household size on a slight decline
- Significant patterns in student enrollment (suburban), zero-car households (urban)

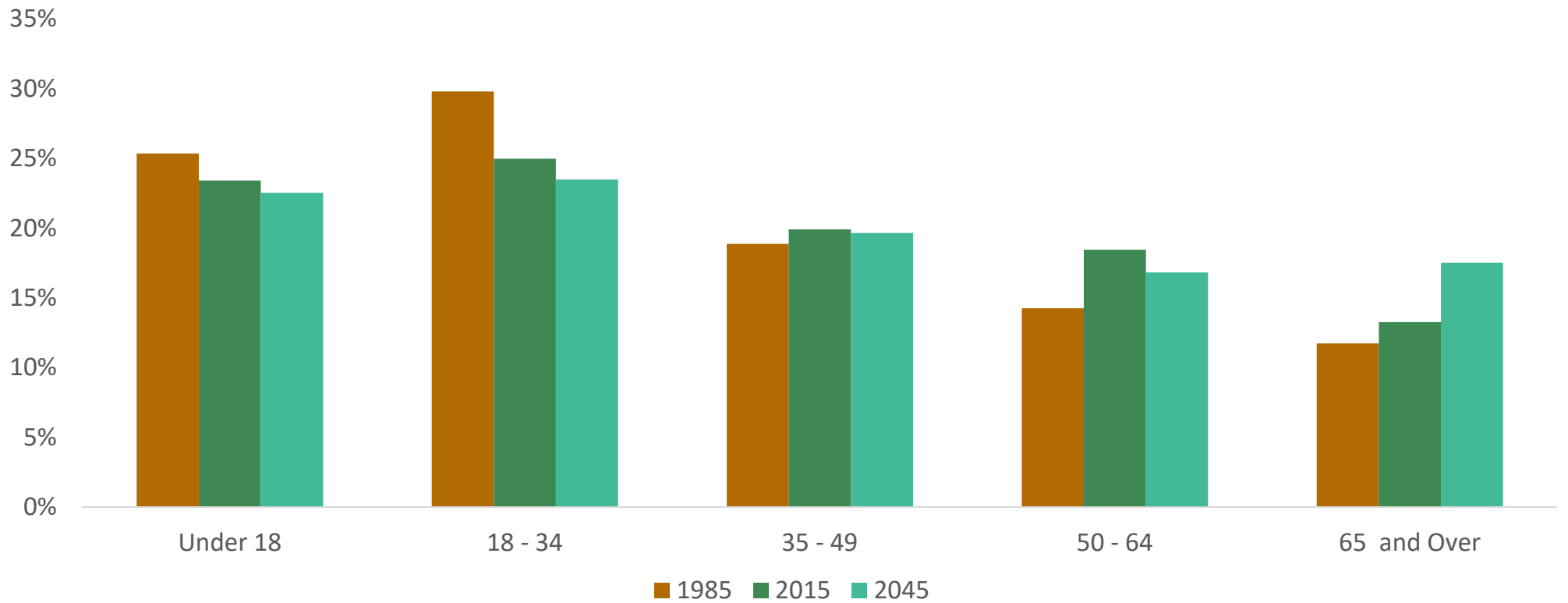
Population and Demographic Trends

Age Cohorts



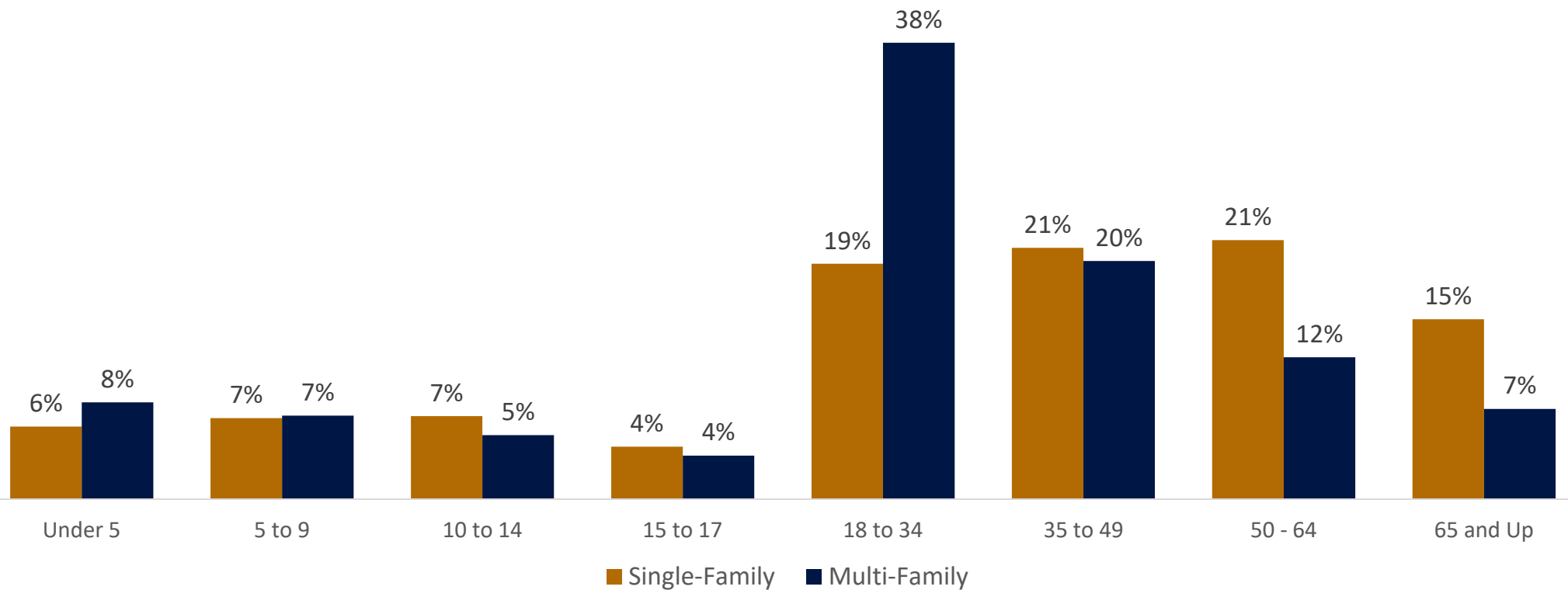
Population and Demographic Trends

Age Cohorts



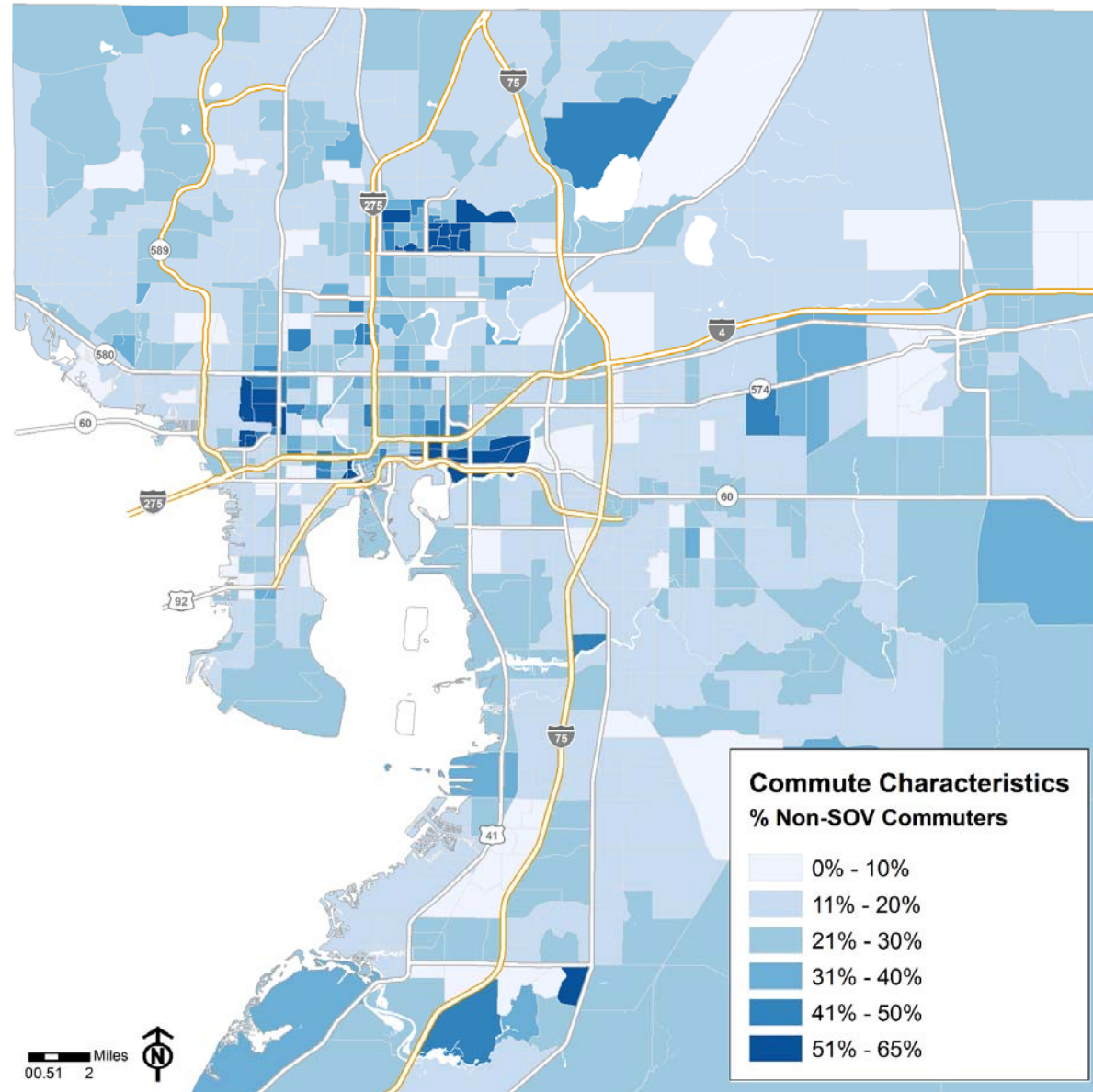
Population and Demographic Trends

Age Cohorts by Housing Type



Population and Demographic Trends

Commute Characteristics



Source: U.S. Census Bureau, 2011-2015 American Community Survey 5-Year Estimates