

# 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

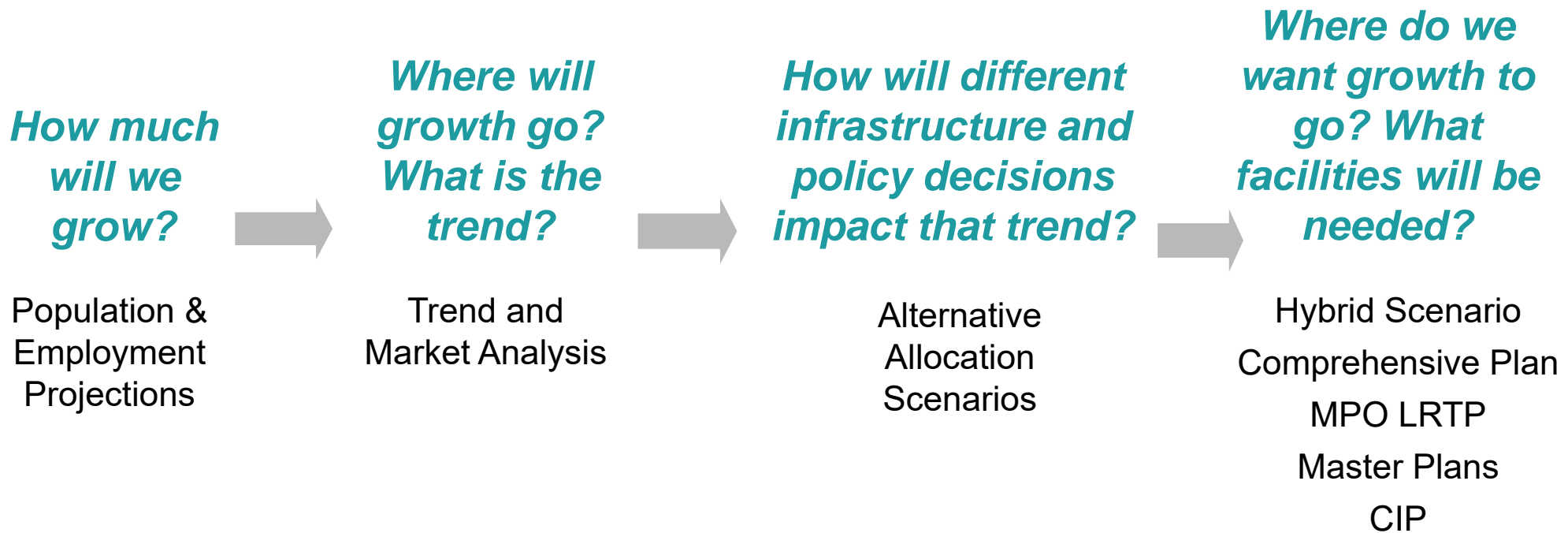
# Population and Employment Allocation

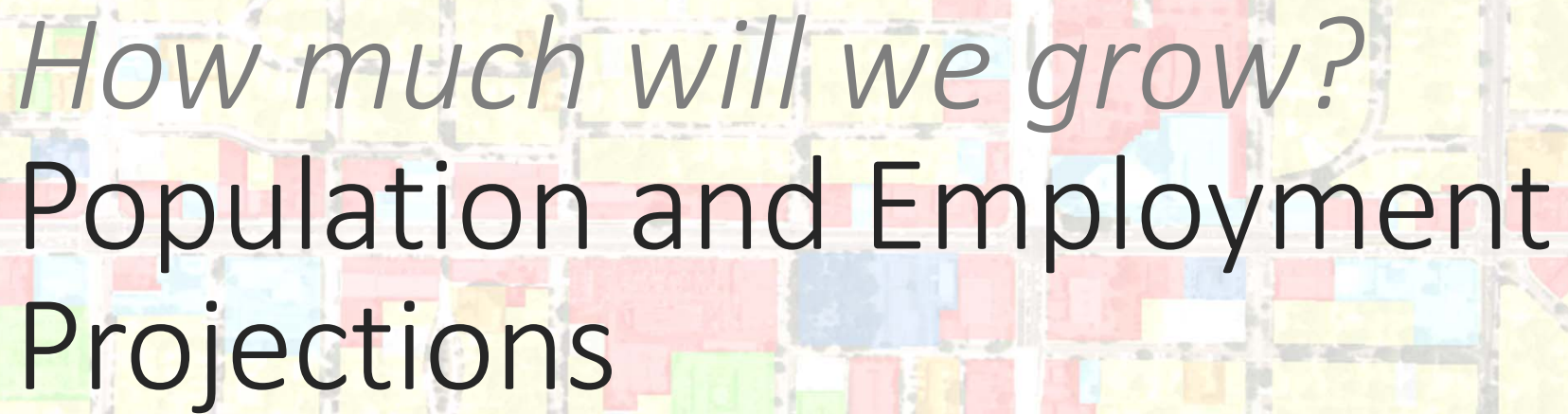
- Update the projections, horizon date and underlying assumptions
- Understand recent demographic trends and how they may impact Hillsborough County in the future
- Grounded in a real estate market analysis
- Look at scenarios of how policy and infrastructure changes impact where population and jobs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





*How much will we grow?*  
Population and Employment  
Projections



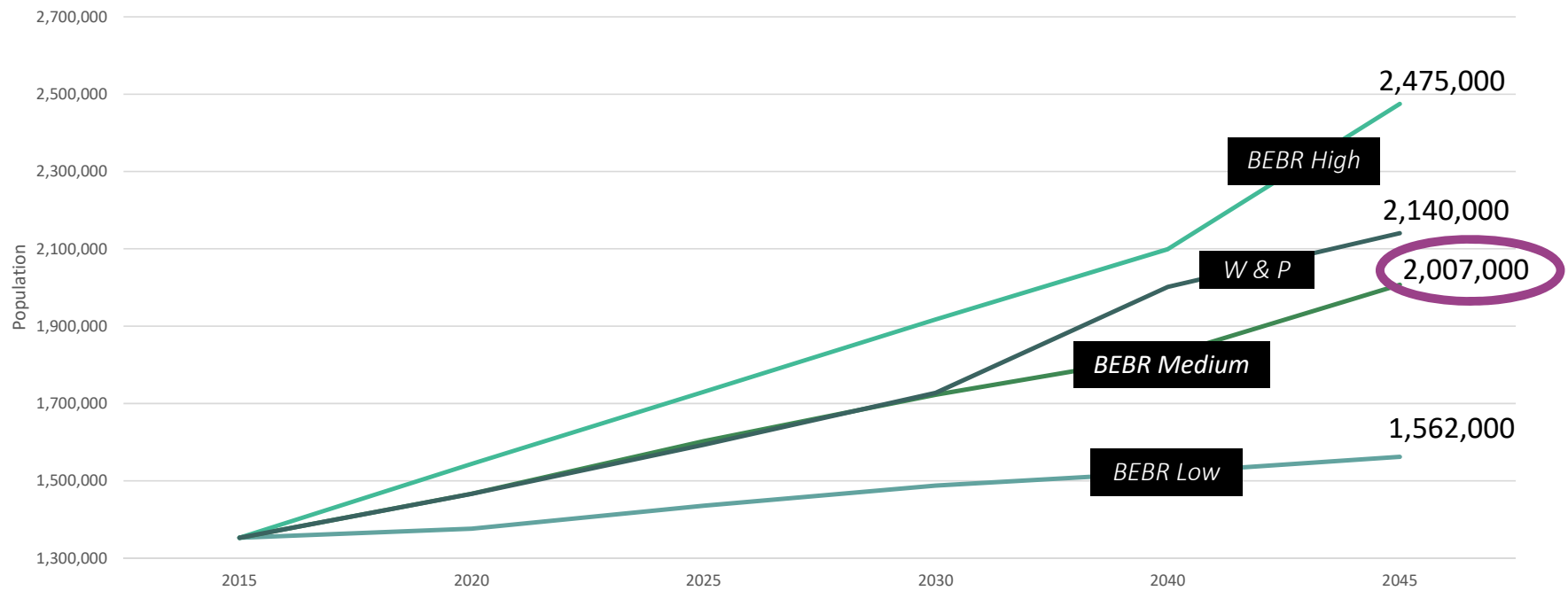
# Control Totals

- Projected population and employment for 2045 + 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



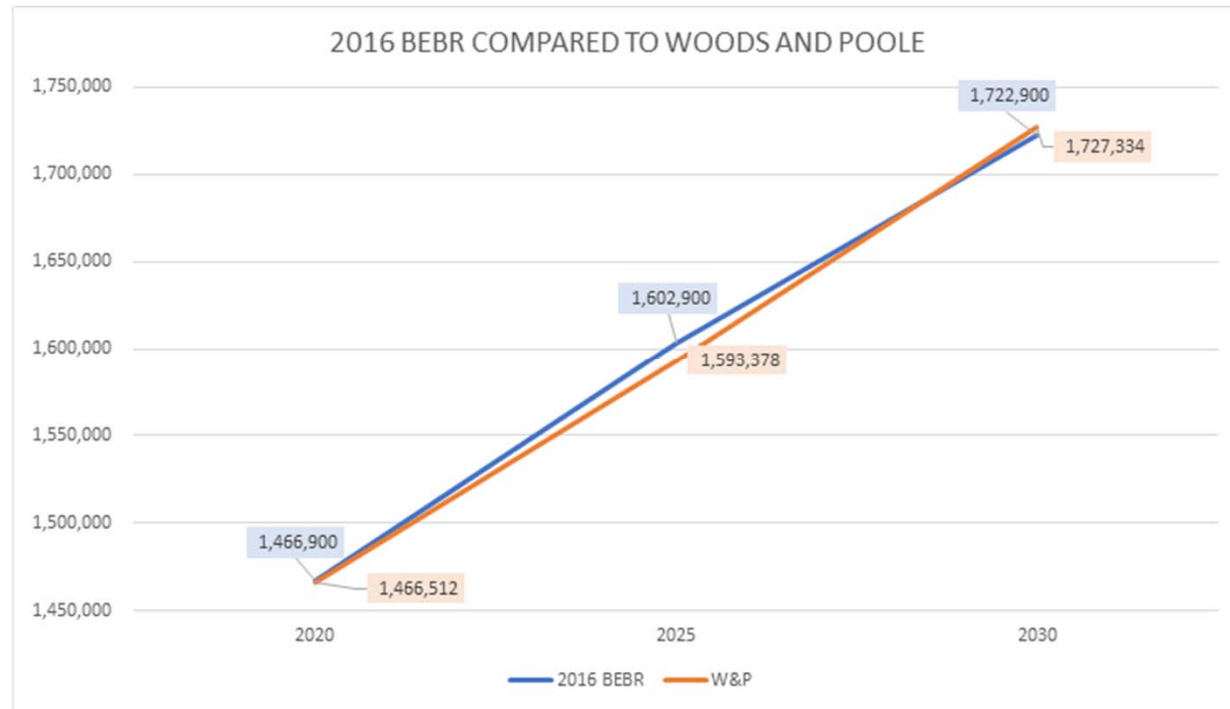
# Population

2045 Population Projections



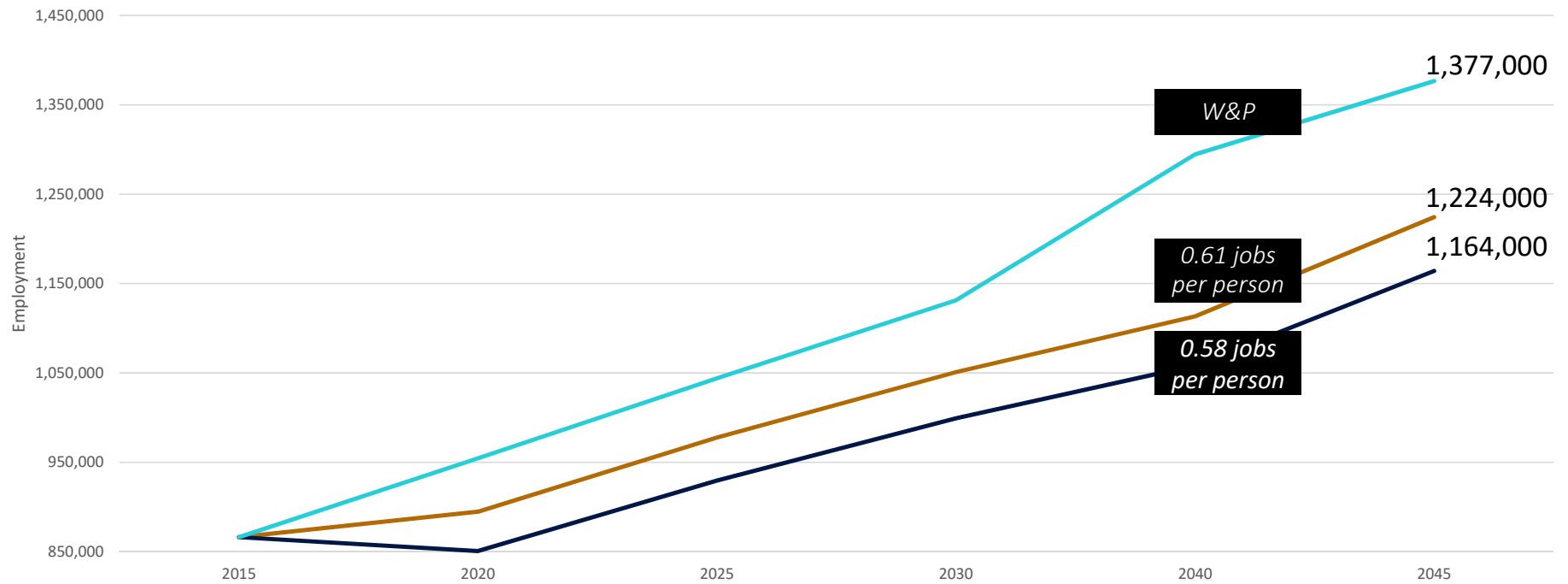
# Shorter Term Projections

	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. Yellow covers most of the area, with red, blue, and green patches scattered throughout. A prominent road with a roundabout is visible on the left side. The text is overlaid on the map.

*Where will growth go?*  
Trend Analysis

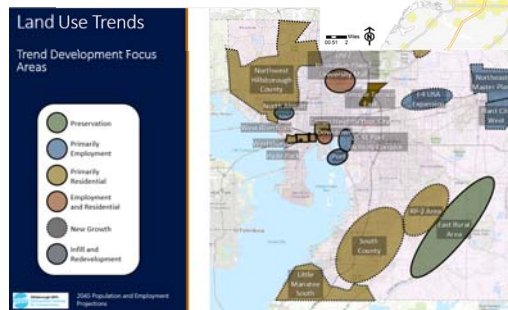
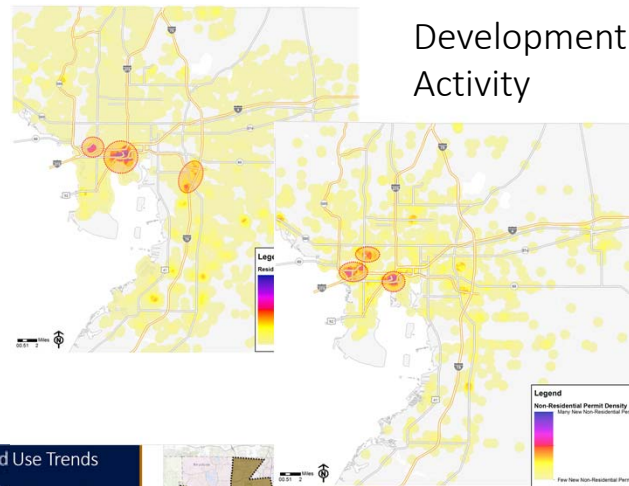


# Trend Analysis

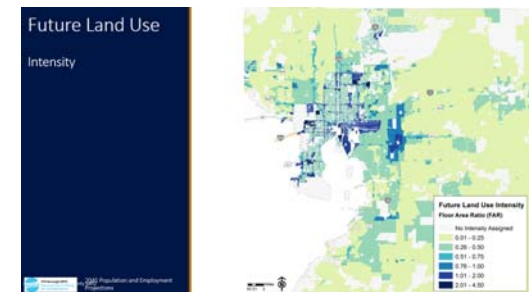
- Based on historical growth trend
- Follows Future Land Use Plan/Map
- Supported by building permit data
- Considers latest demographic data
- Real estate market analysis consultant review
- Draft data/maps attached

# Trend analysis and planning assumptions

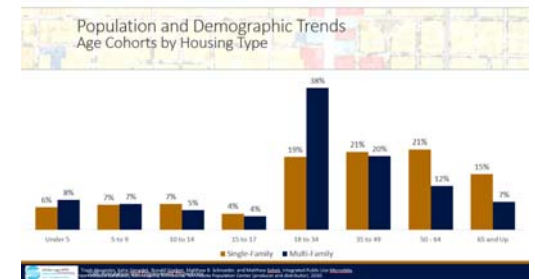
## Land use



## Policy



## Demographics

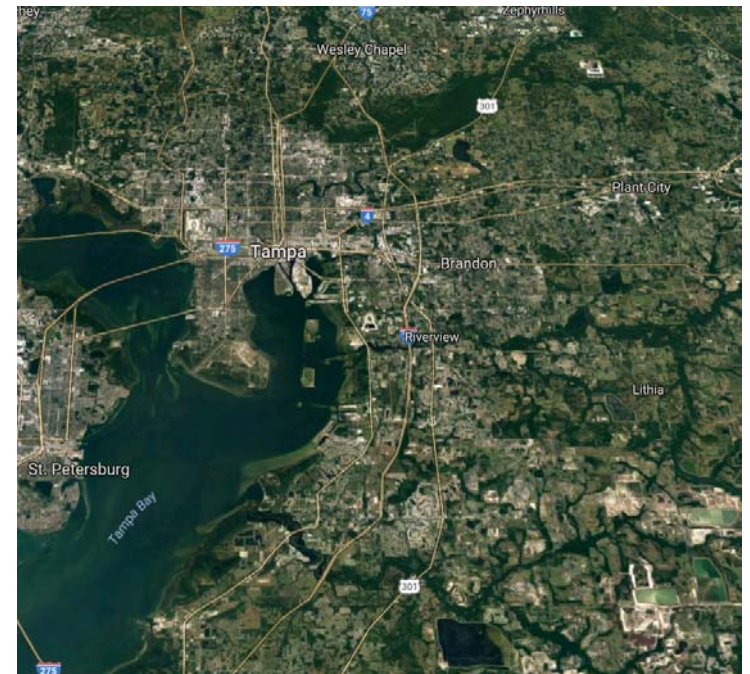


An aerial photograph of a city grid with various colored overlays in yellow, red, blue, and green, likely representing different land use zones or planning scenarios. The text is overlaid on this map.

# 2045 Trend and Scenario Analysis

# What will Hillsborough County look like in 30 years?

- Where will we grow?
- How will we grow?
- What does this mean for...
  - Transportation?
  - Housing?
  - Infrastructure?
  - Schools?





# 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 residential areas. Red highlights specific blocks, possibly commercial or industrial. Blue and green highlight other specific areas, possibly parks or public facilities. The text 'Next Steps' is overlaid on the map in a large, black, sans-serif font.

# Next Steps



# Timeline

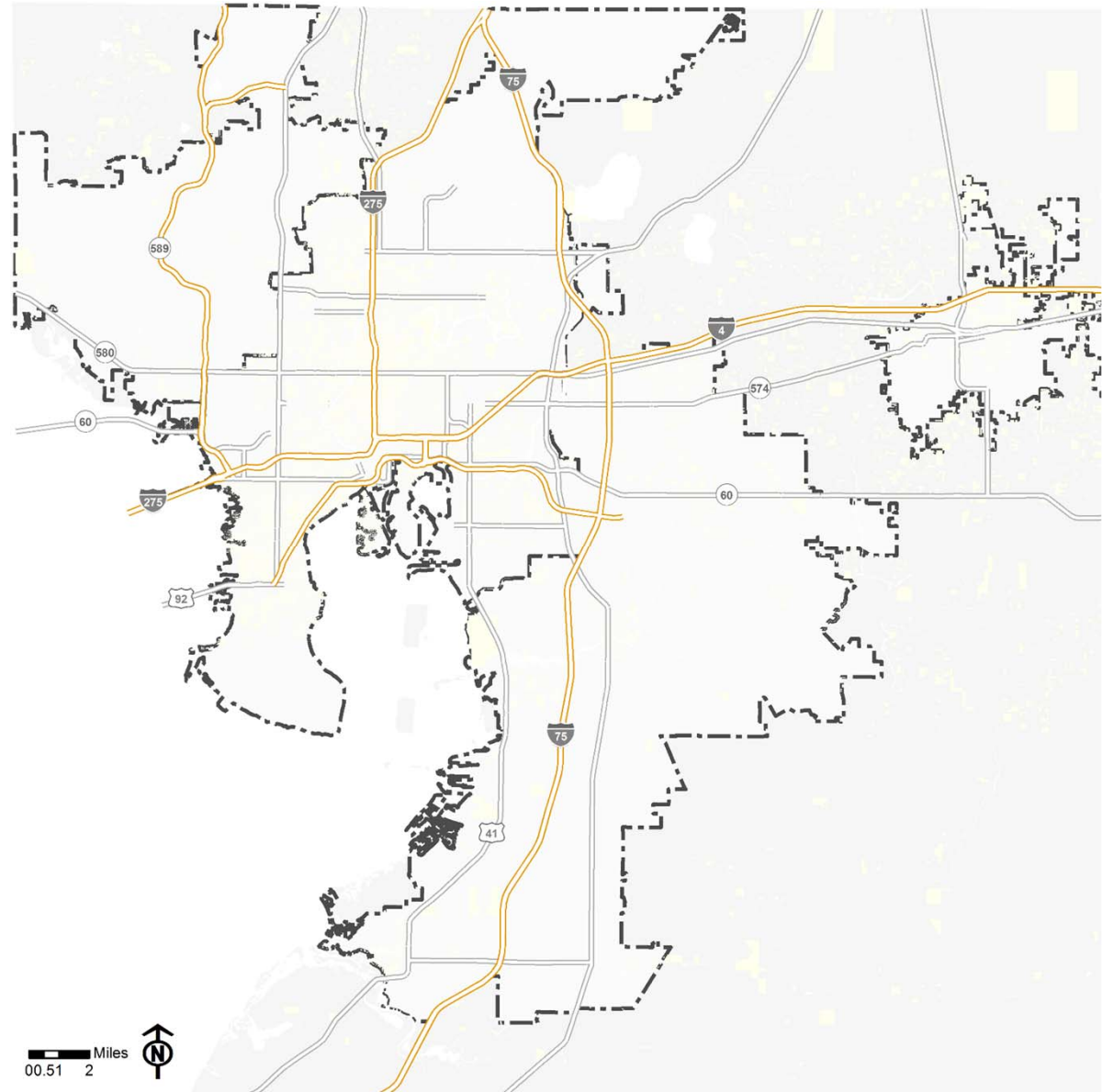
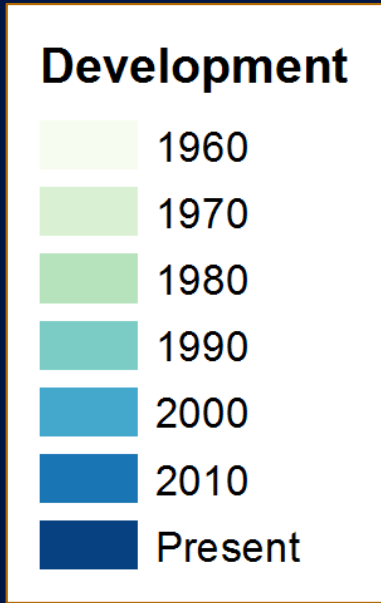
- Trend and Market Analysis – early 2018
- Alternative Scenarios – Spring 2018
- Outreach – Summer 2018
- Hybrid Scenario – Fall 2018

An aerial photograph of a residential or commercial area, overlaid with a grid of colored polygons in shades of yellow, red, blue, and green. The map shows streets and building footprints. The text is centered over the map.

# Attachments – Draft Trend Analysis Maps

# Land Use Trends

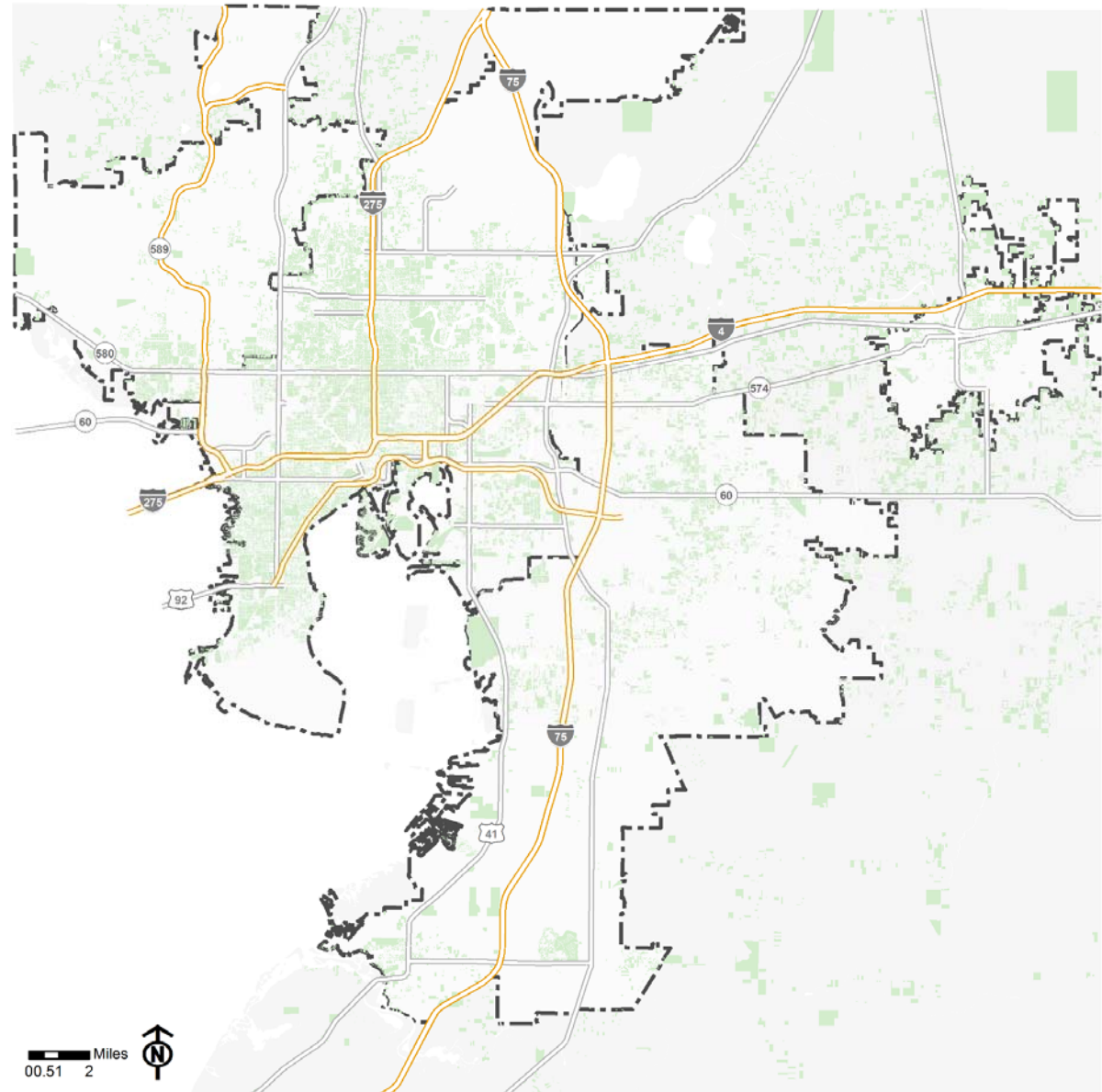
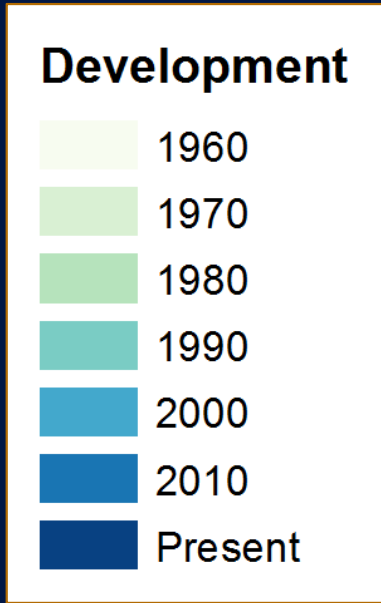
Developed land: 1960



Source: Hillsborough County MPO

# Land Use Trends

Developed land: 1970



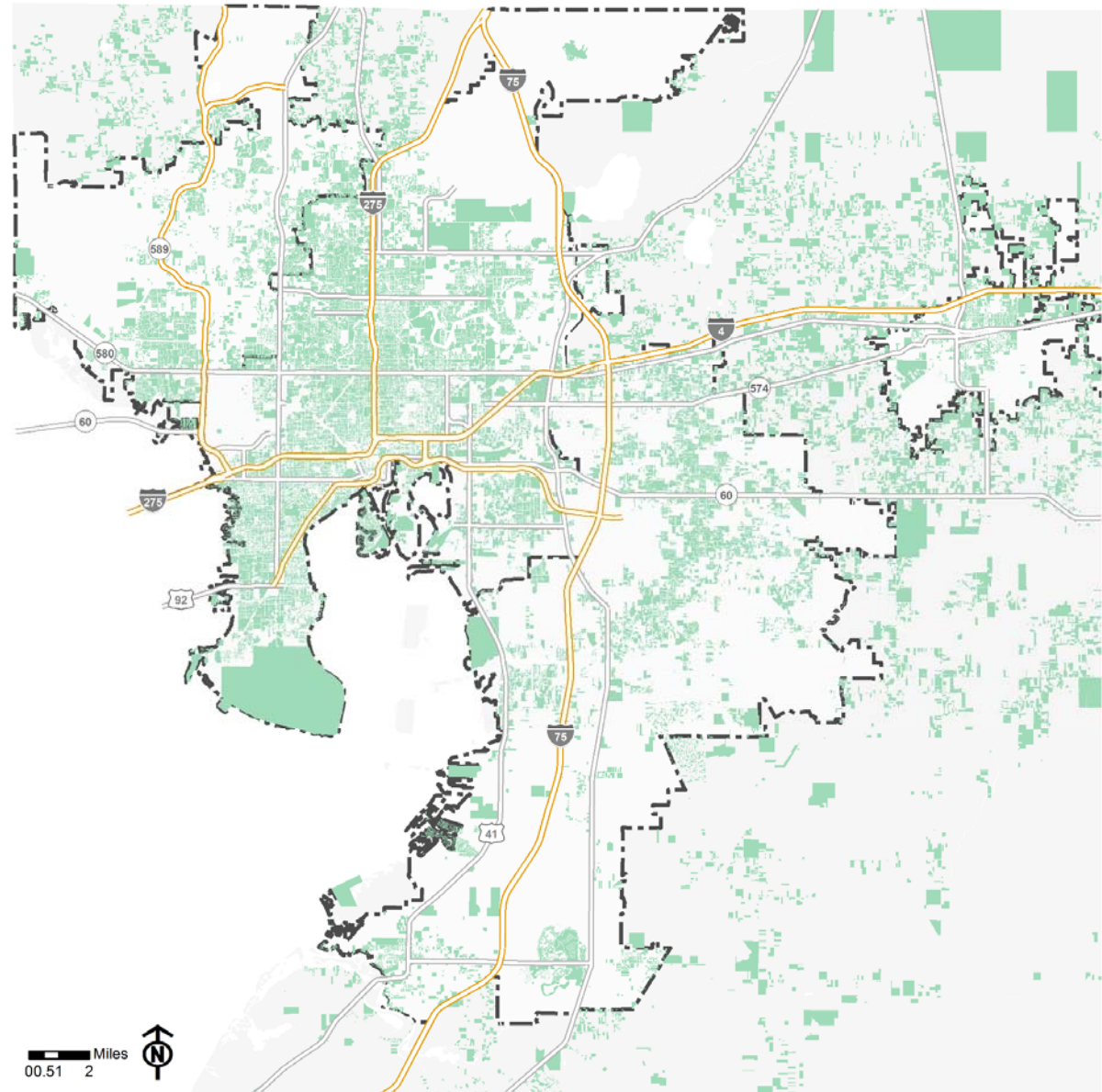
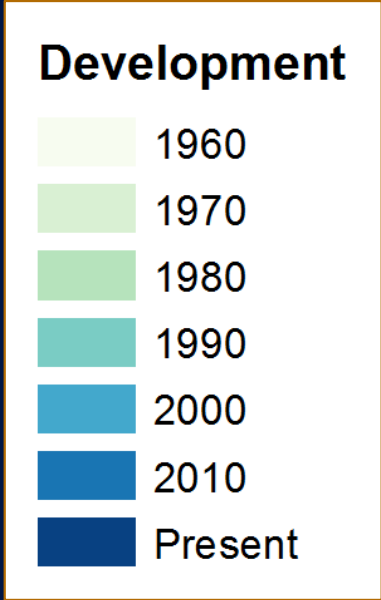
Source: Hillsborough County MPO



2045 Population and Employment Projections

# Land Use Trends

Developed land: 1980



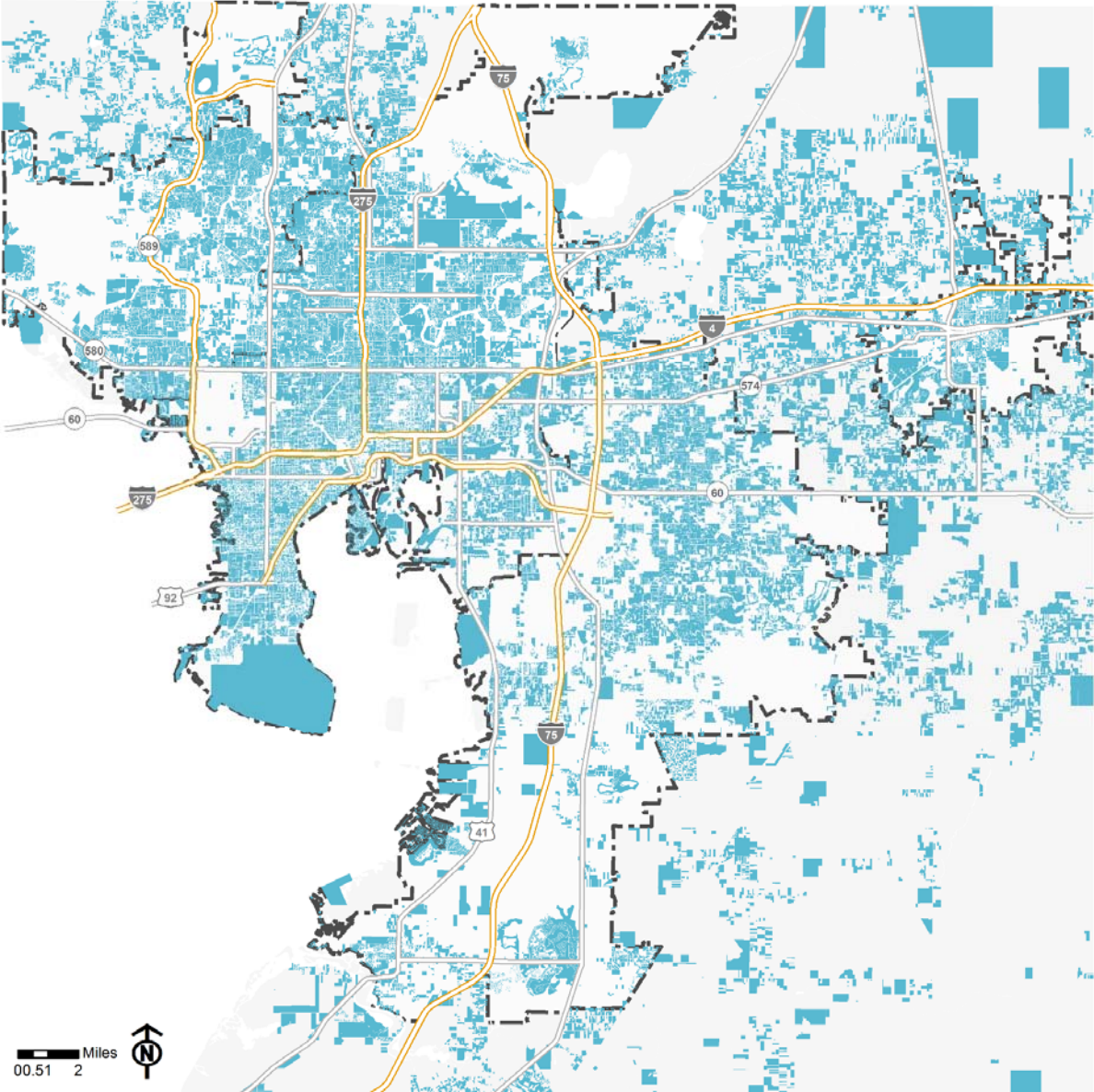
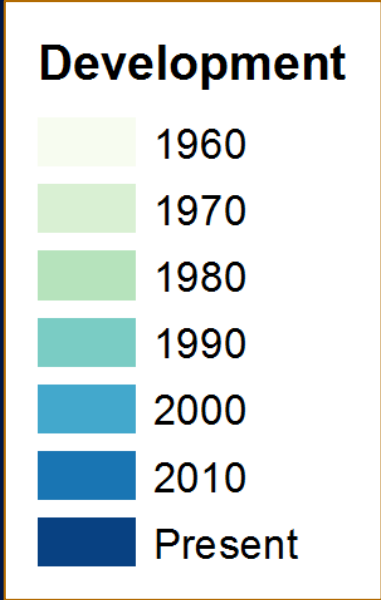
Source: Hillsborough County MPO



2045 Population and Employment Projections

# Land Use Trends

## Developed land: 1990



Source: Hillsborough County MPO



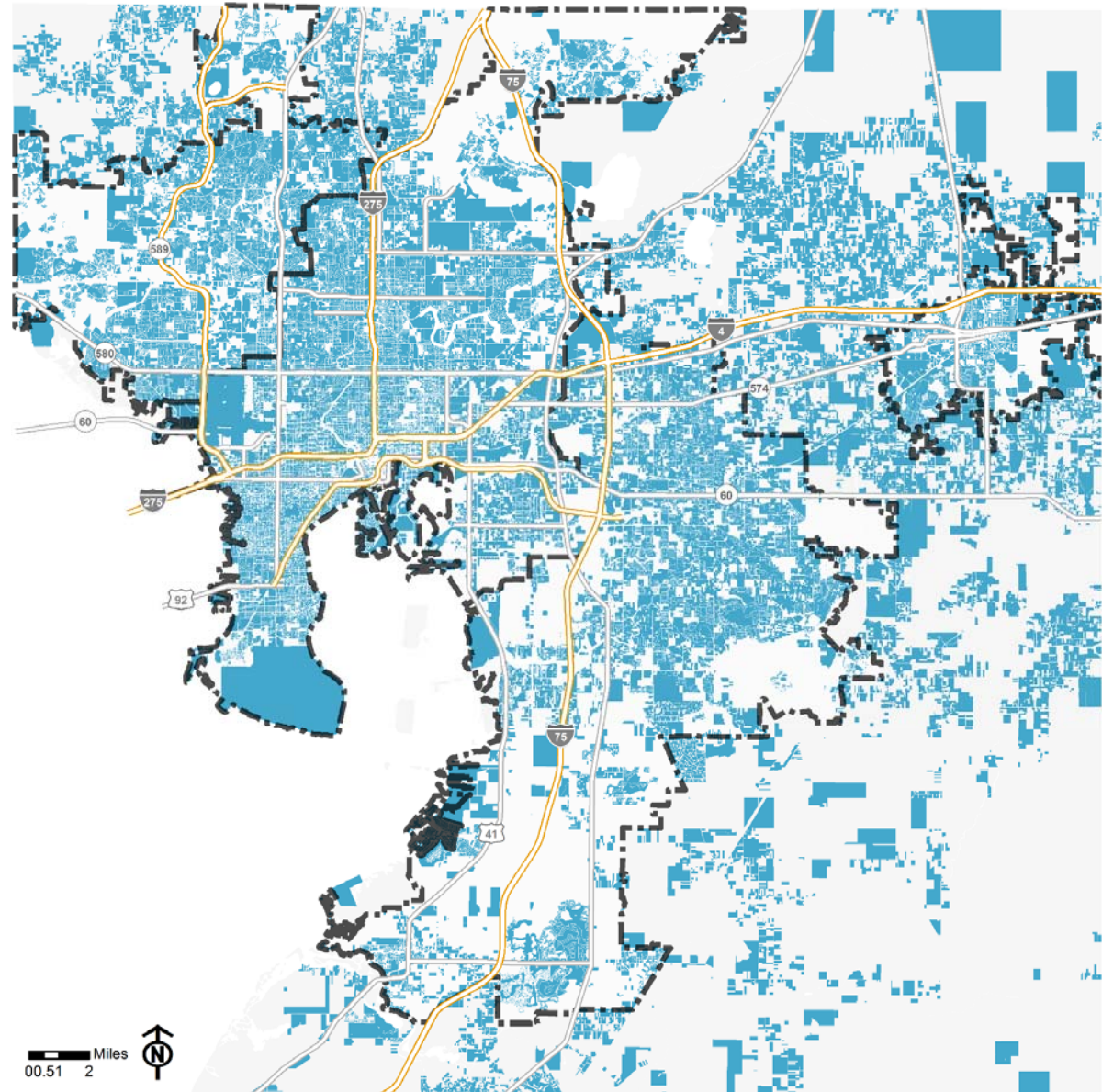
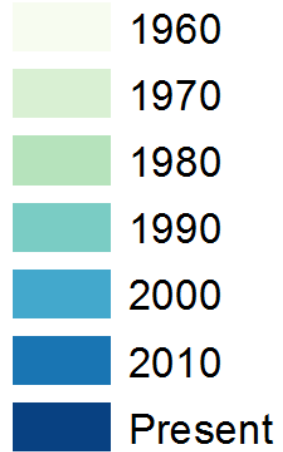
2045 Population and Employment Projections



# Land Use Trends

## Developed land: 2000

### Development



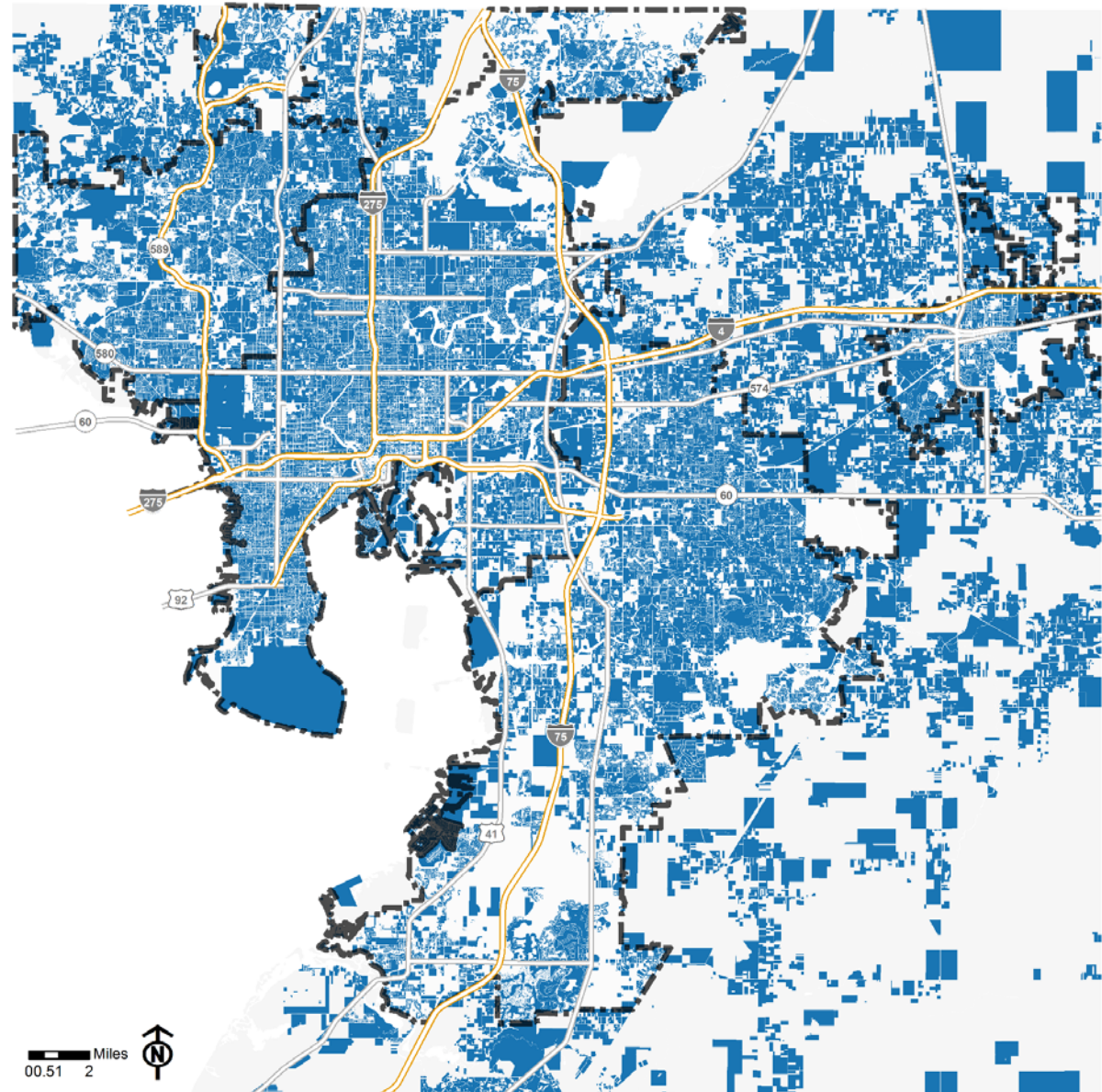
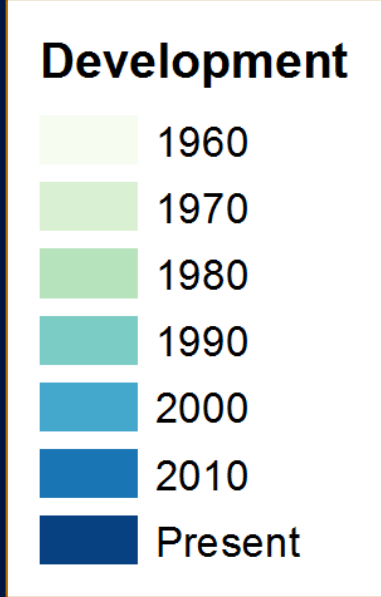
Source: Hillsborough County MPO



2045 Population and Employment Projections

# Land Use Trends

## Developed land: 2010



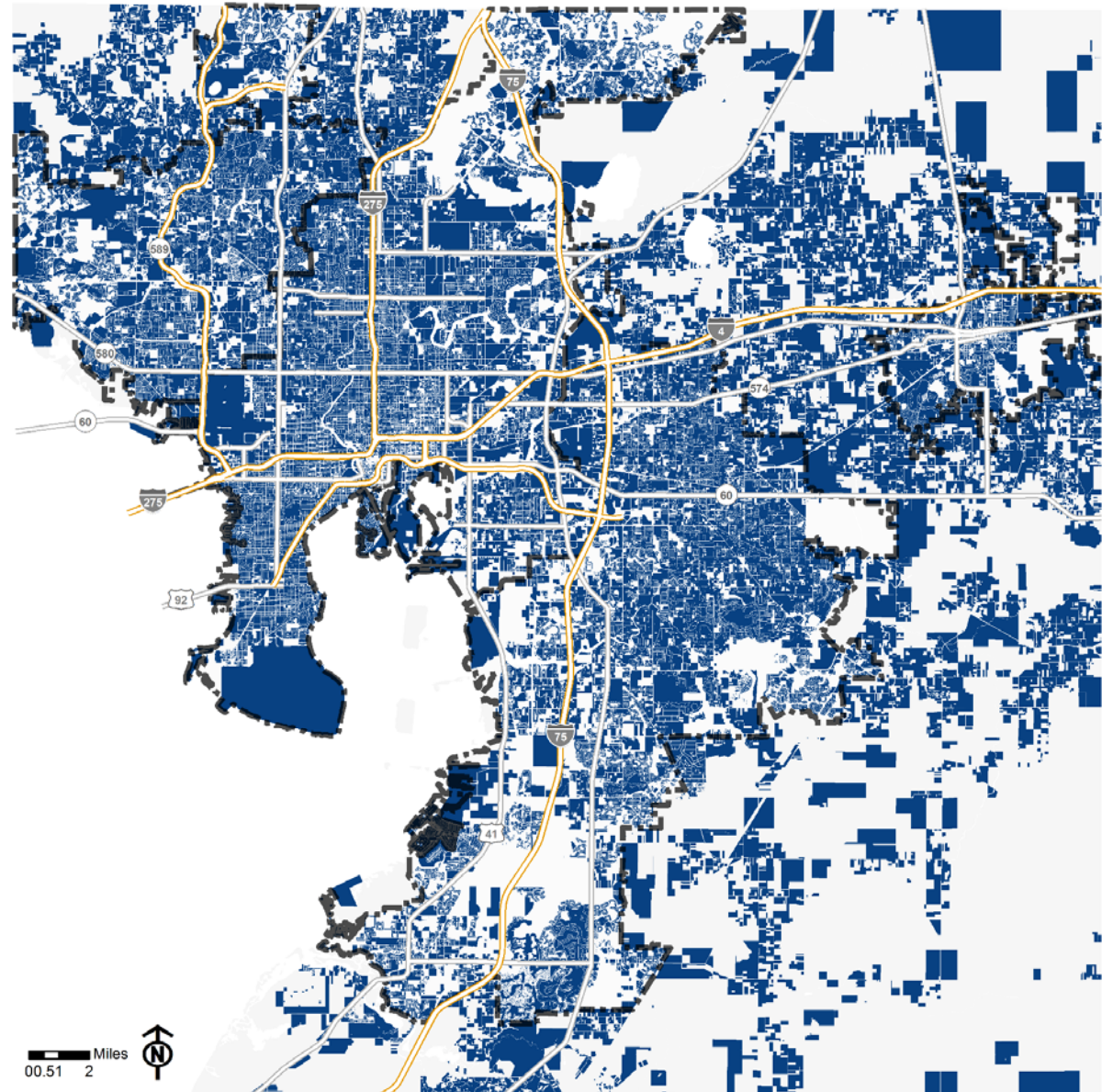
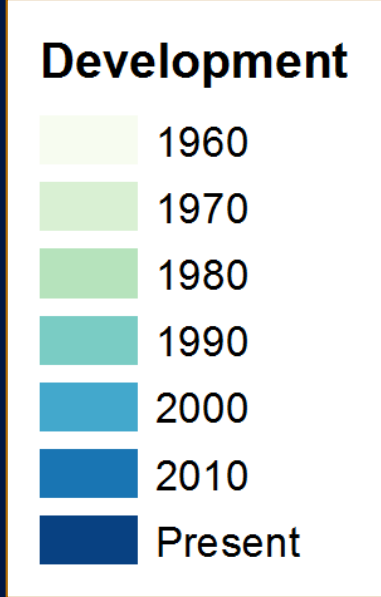
Source: Hillsborough County MPO




2045 Population and Employment Projections

# Land Use Trends

## Developed land: Present



Source: Hillsborough County MPO

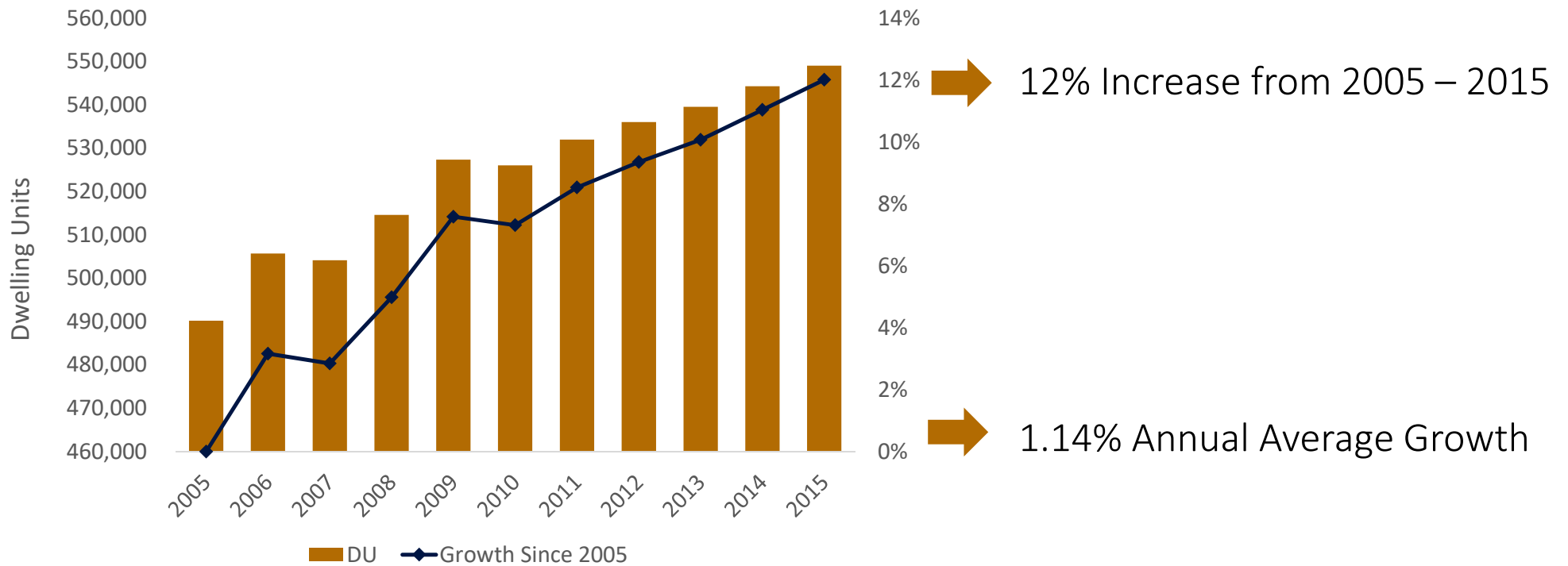


# Residential: Key Findings

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

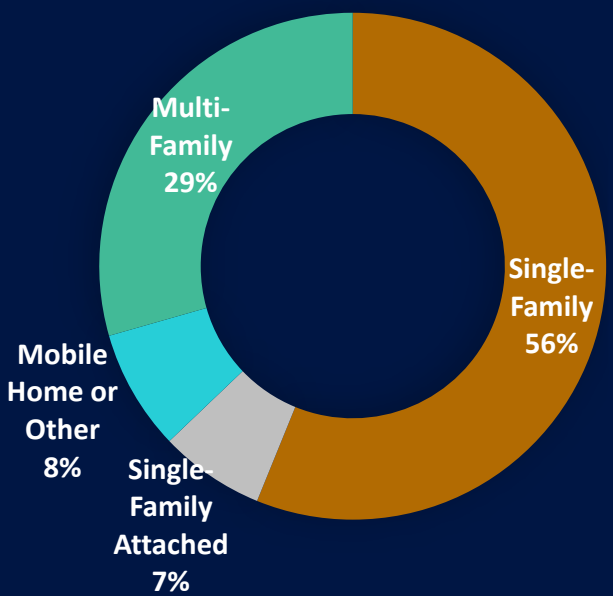
# Residential Growth Trends

## Dwelling Units



# Residential Growth Trends

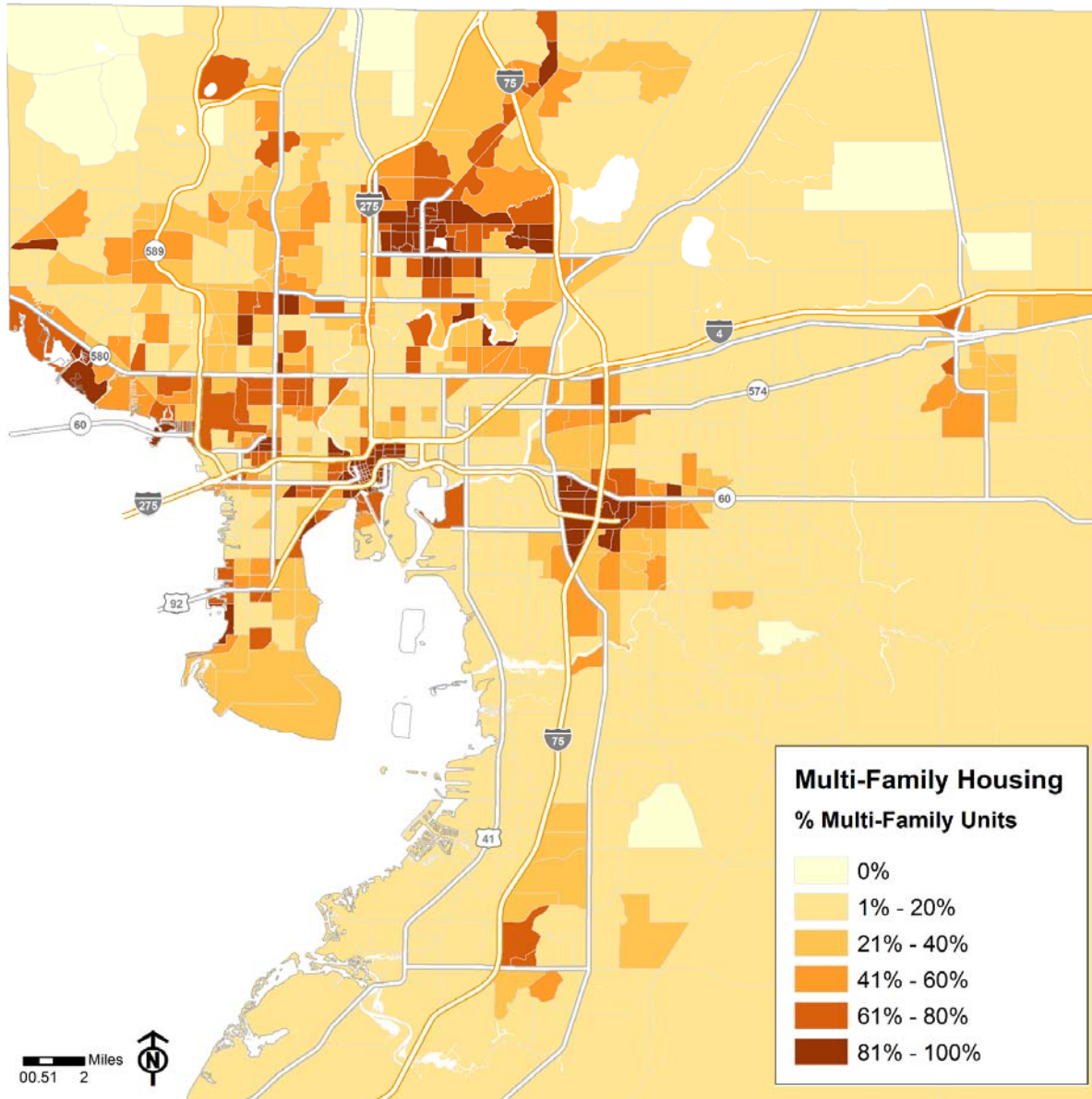
## Housing Type



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



2045 Population and Employment Projections



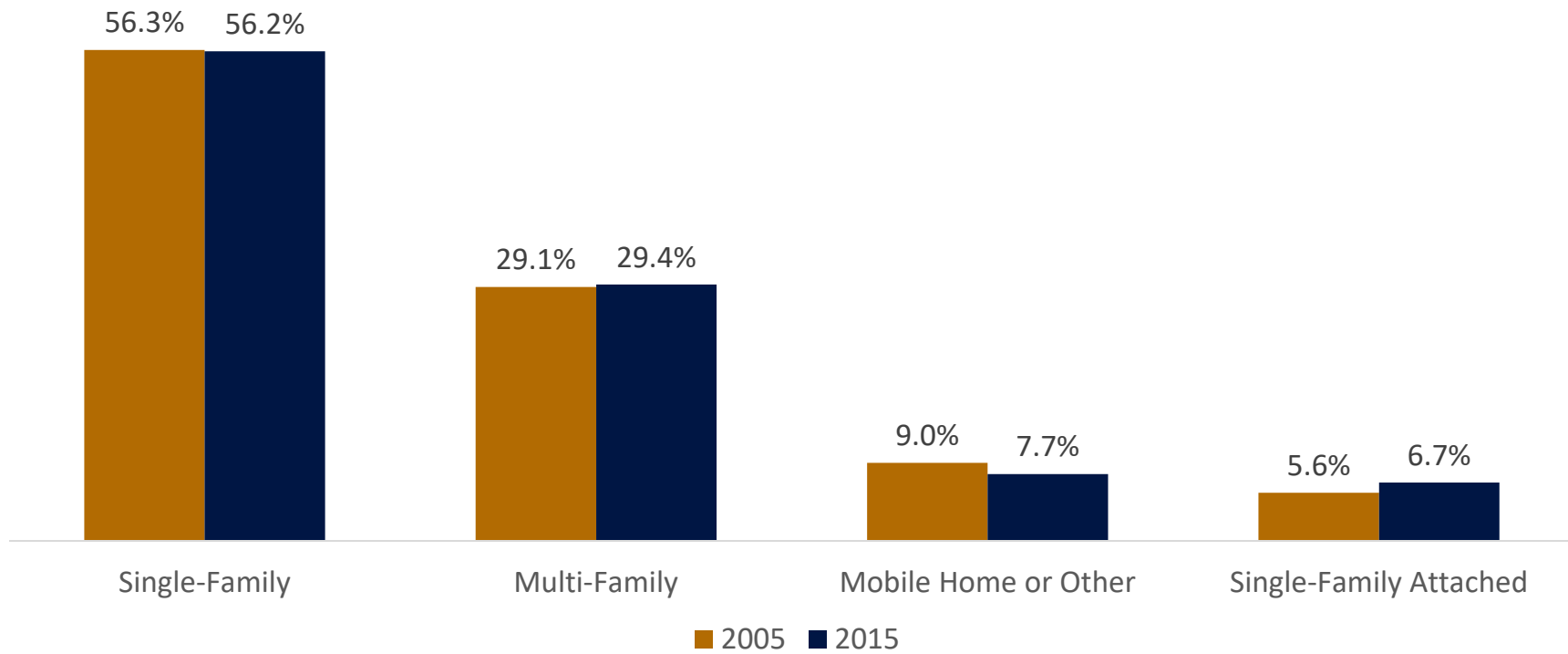


Hillsborough County  
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## 2045 Population and Employment Projections

# 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



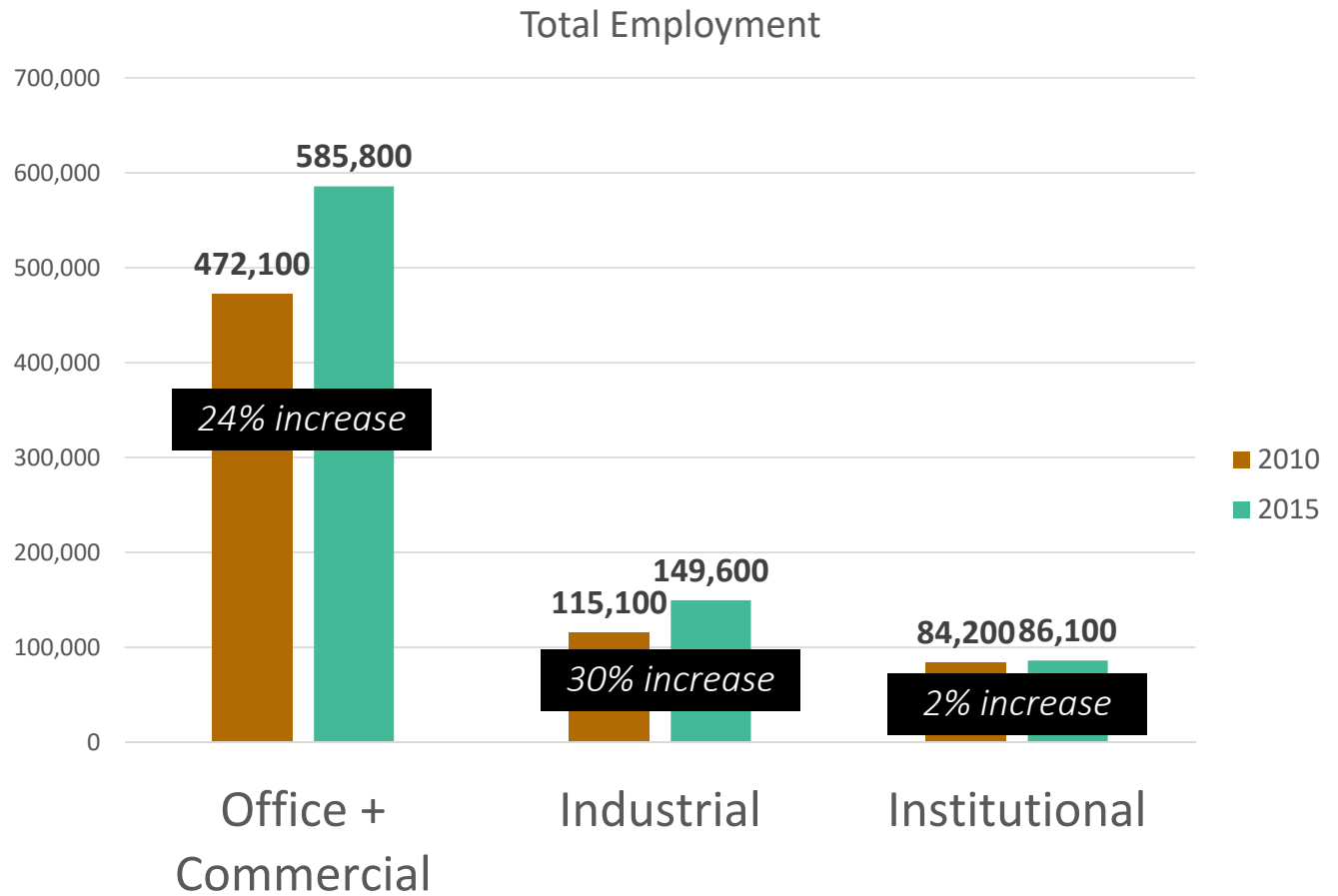
Source: Hillsborough County MPO

# 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



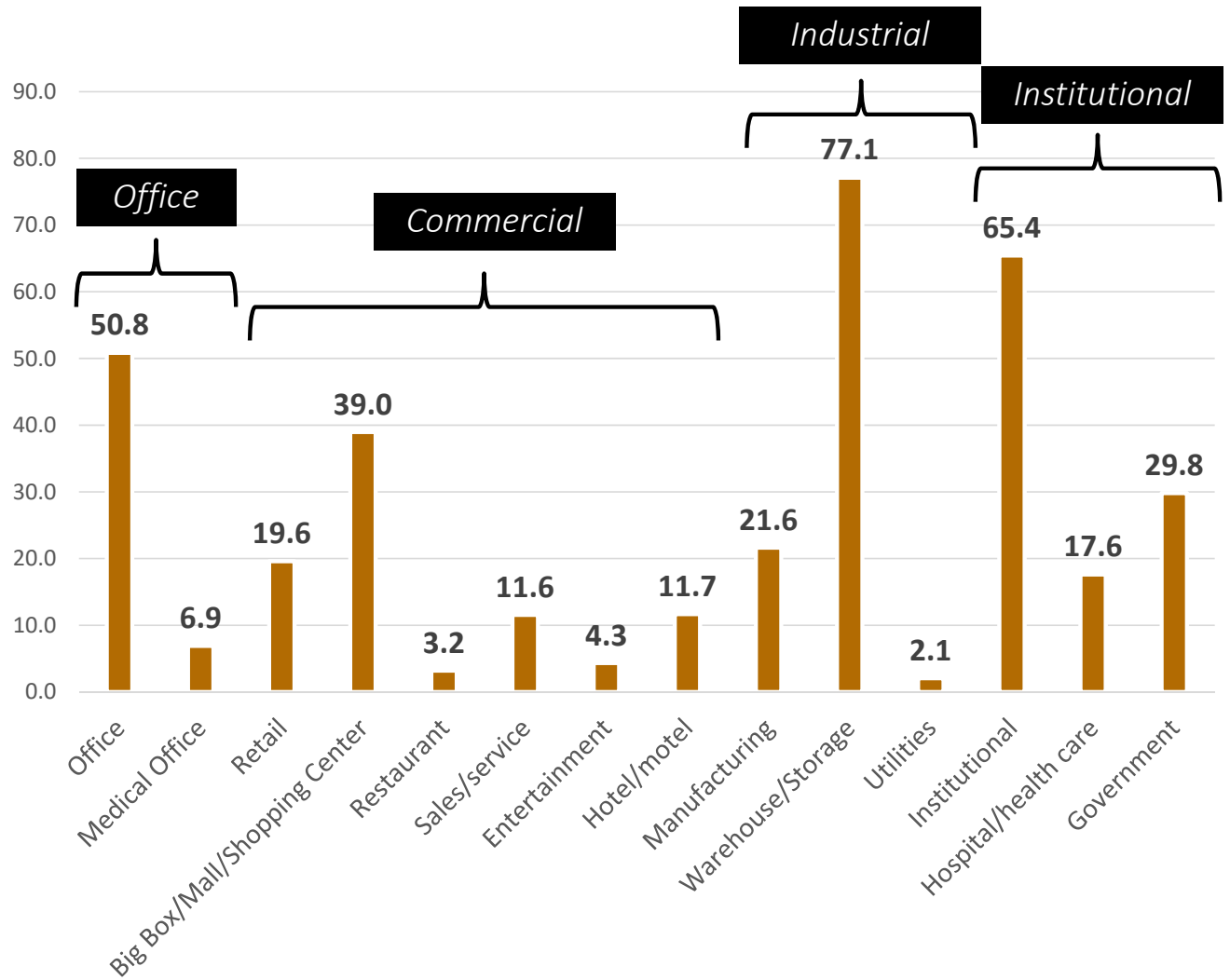
Census Bureau, Florida Department of Economic Opportunity, Bureau of Economic Analysis.  
Heated square footage reported in Hillsborough County Property Appraiser parcel database.



2045 Population and Employment Projections

# Employment Growth Trends

Floor Area  
(millions of square feet)



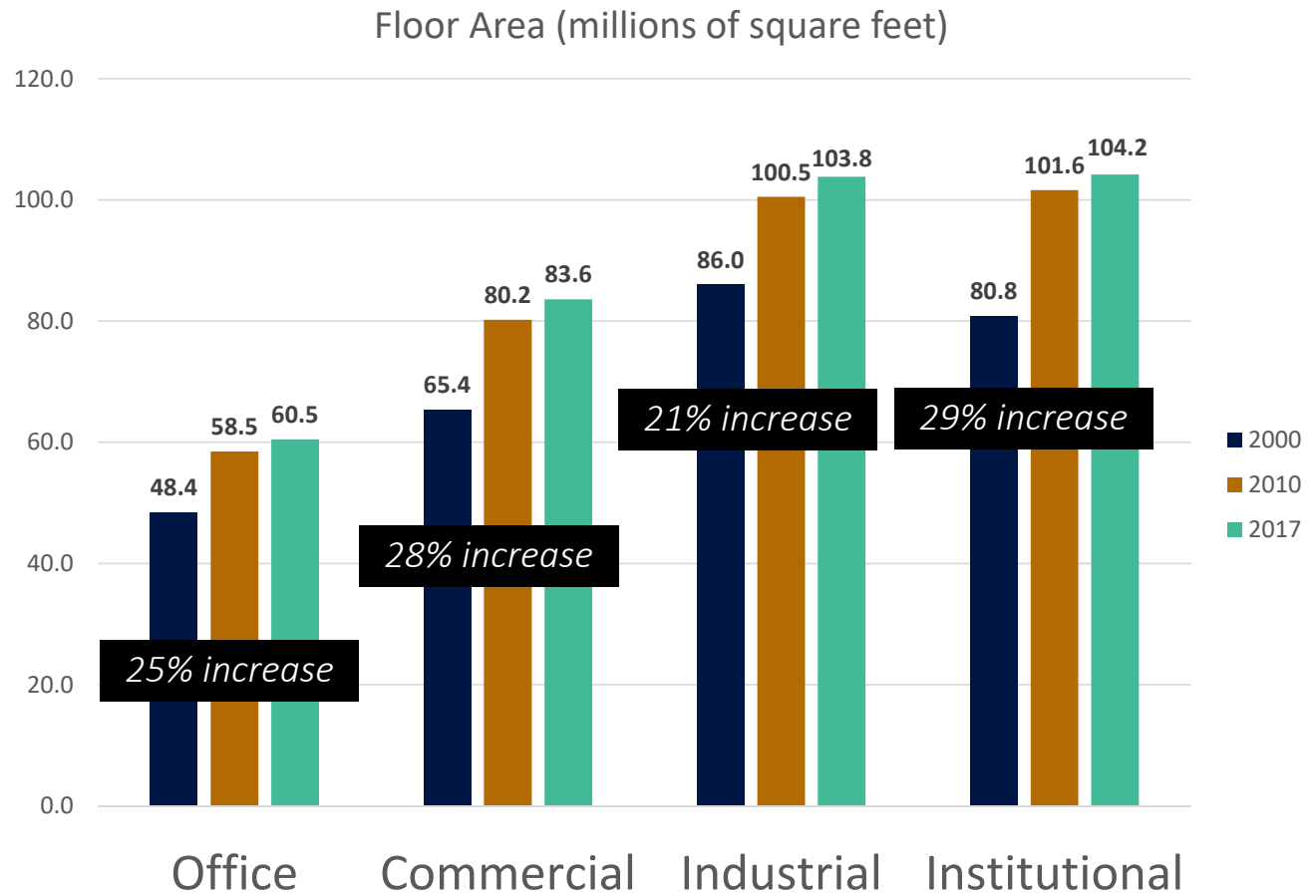
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2045 Population and Employment Projections

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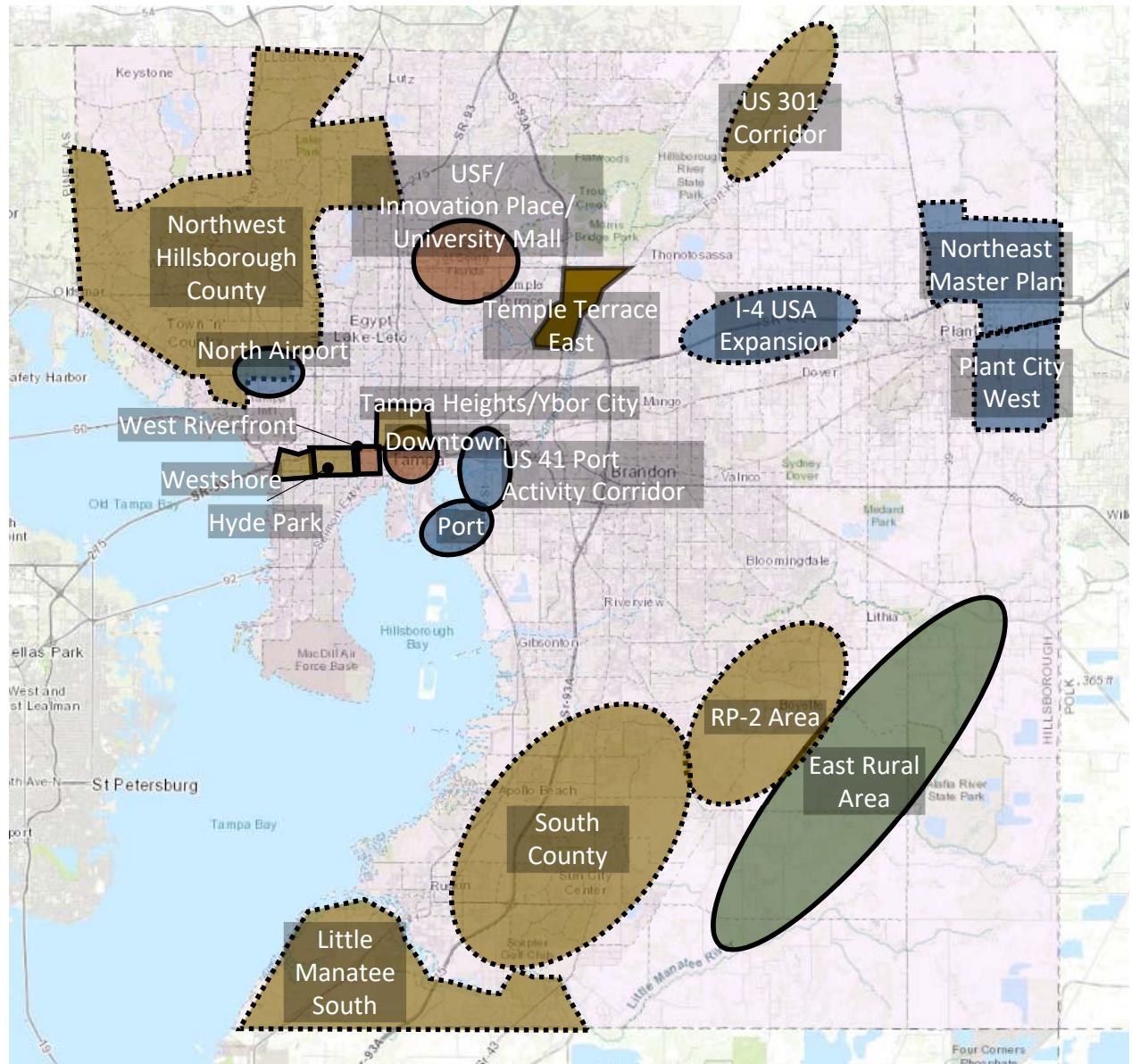


2045 Population and Employment Projections

# Land Use Trends

## Trend Development Focus Areas

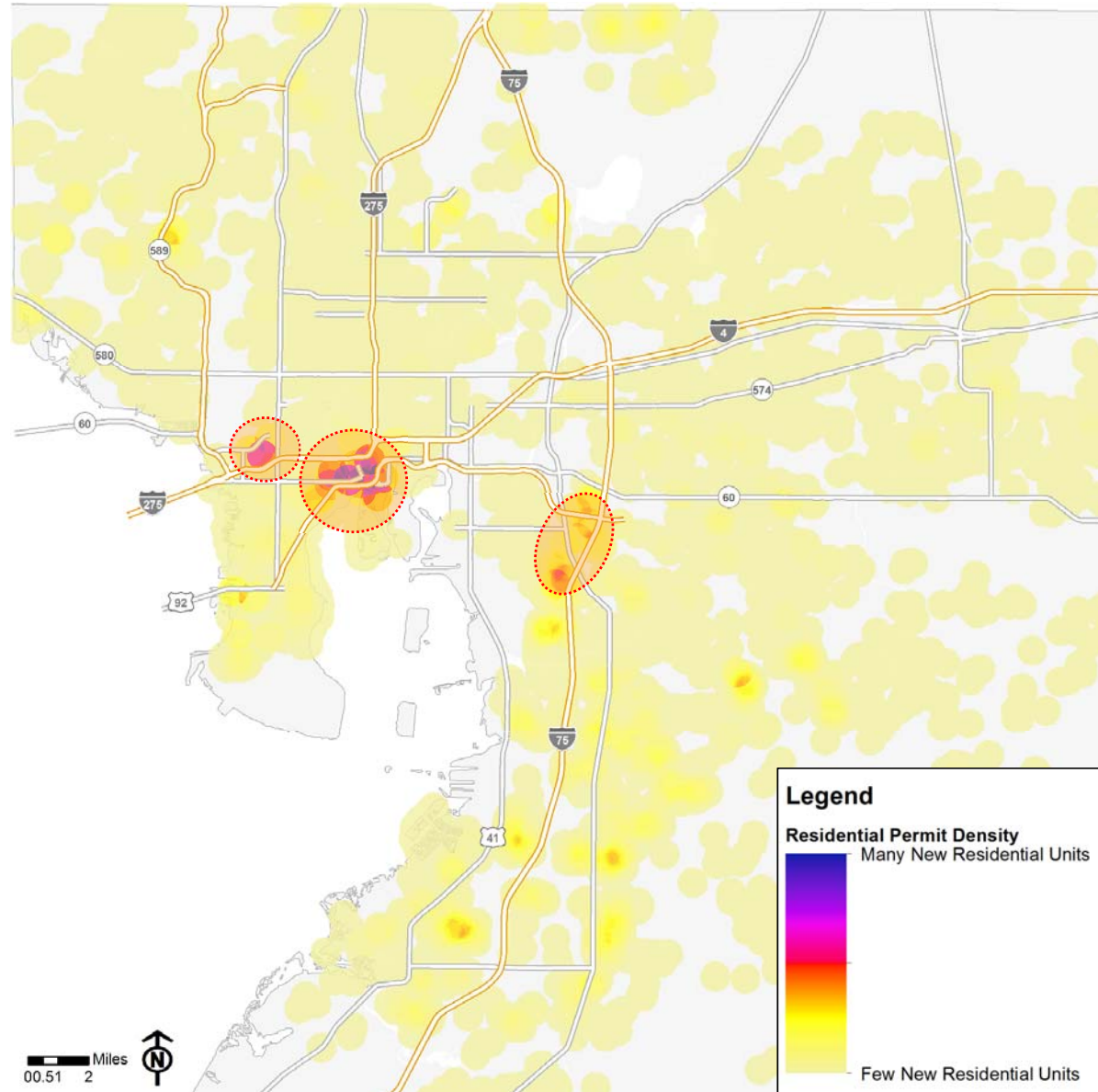
-  Preservation
-  Primarily Employment
-  Primarily Residential
-  Employment and Residential
-  New Growth
-  Infill and Redevelopment



# Land Use Trends

## Residential Building Permits by Unit

- Downtown
- Channel District
- West Riverfront
- Westshore
- South Brandon



Source: Hillsborough County MPO

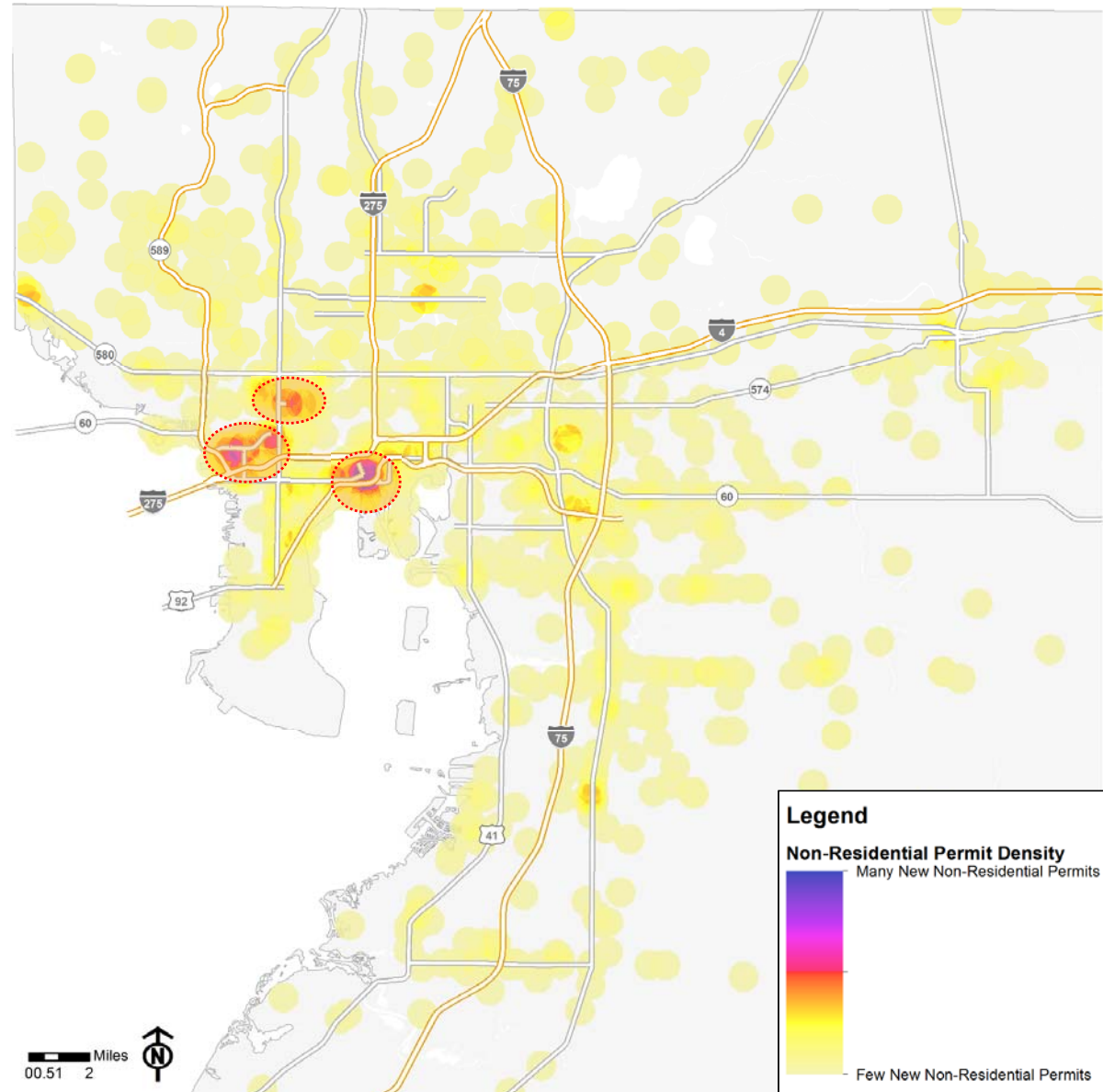


2045 Population and Employment Projections

# Land Use Trends

## Non-Residential Building Permits by Unit

- Downtown
- Westshore
- Airport area



Source: Hillsborough County MPO

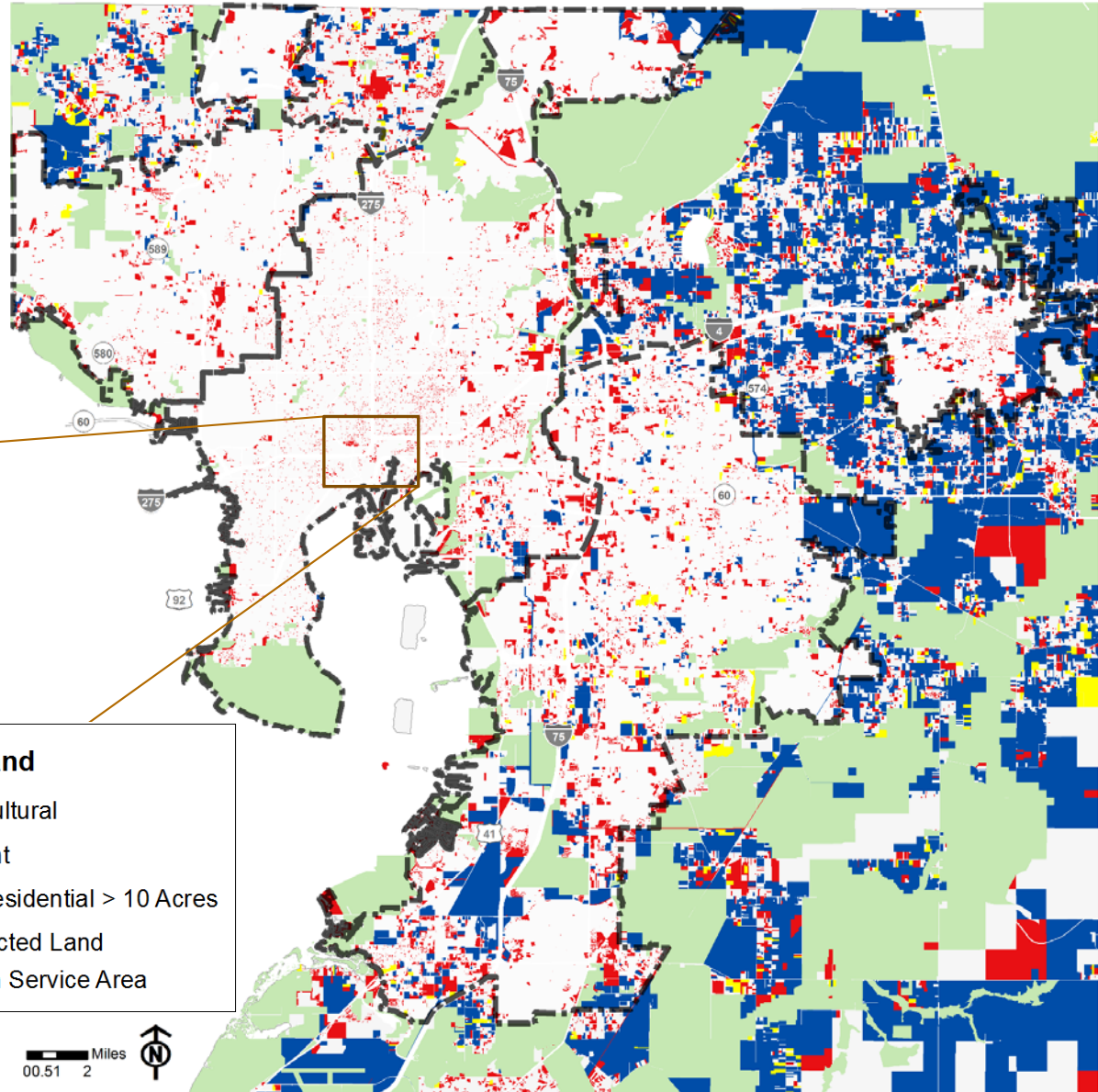
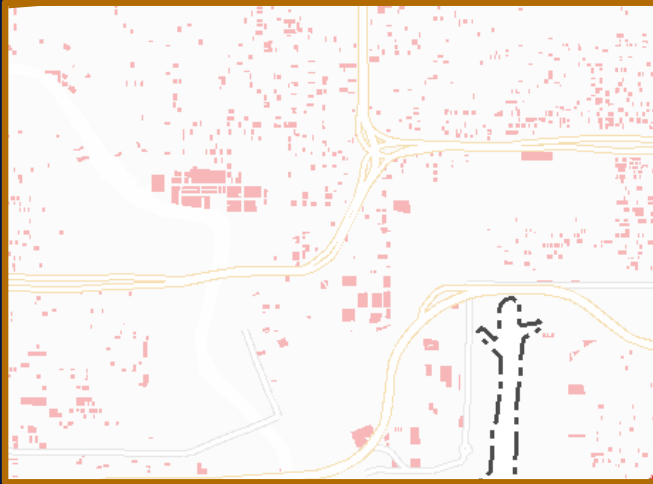


2045 Population and Employment Projections



# Land Use Trends

## Developable Land



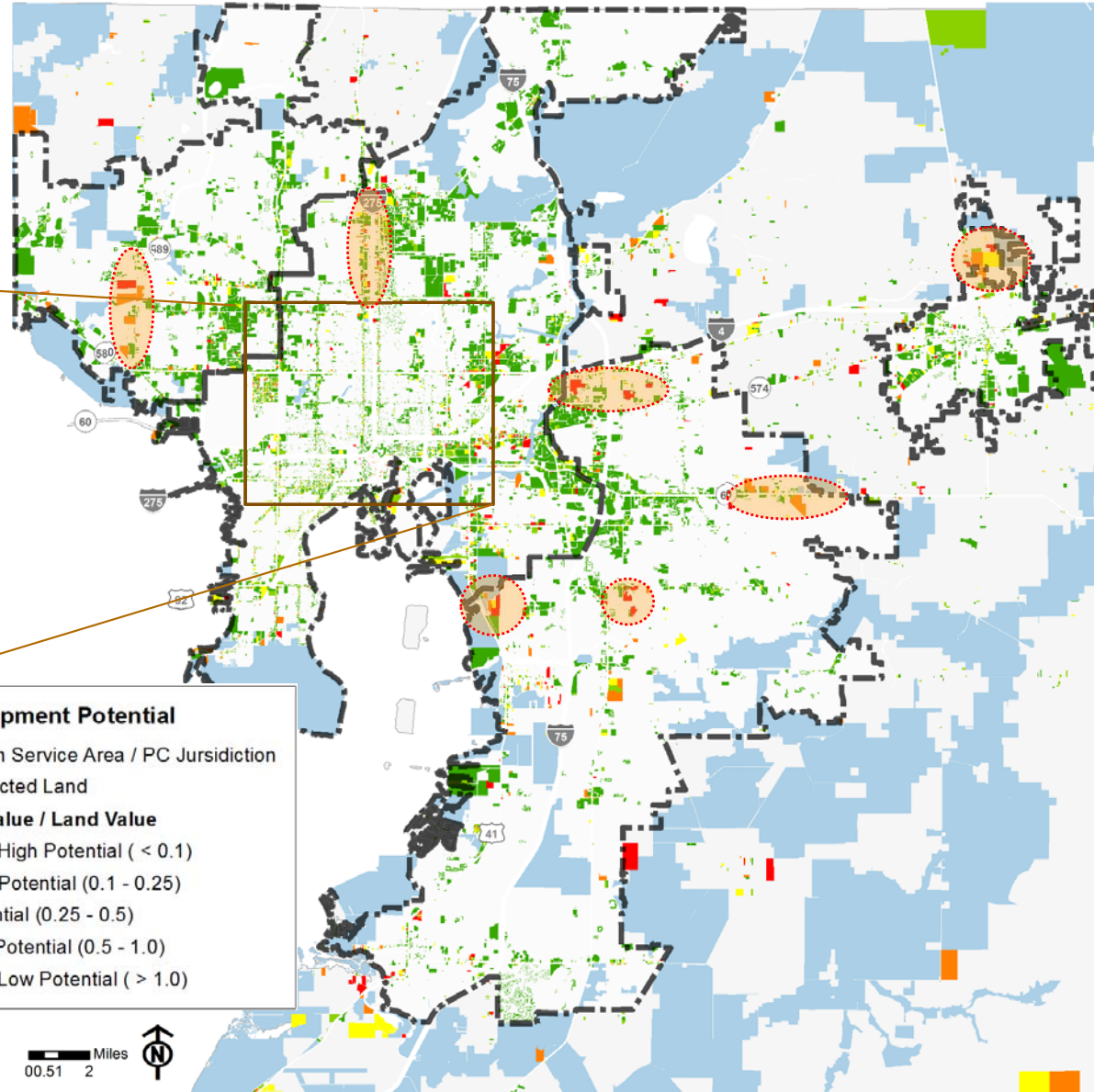
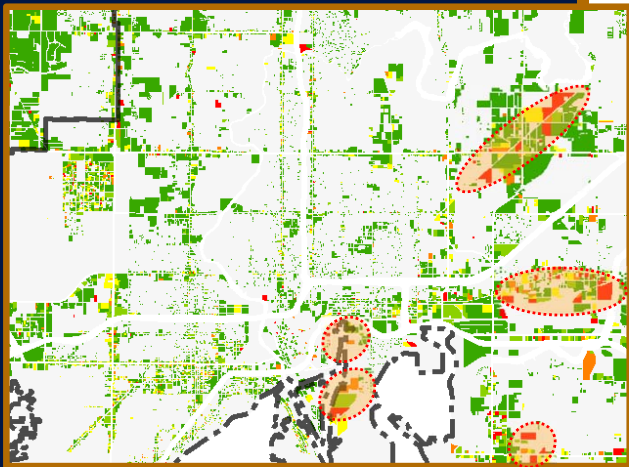
Source: Hillsborough County MPO



2045 Population and Employment Projections

# Land Use Trends

## Redevelopment Potential



Source: Hillsborough County MPO



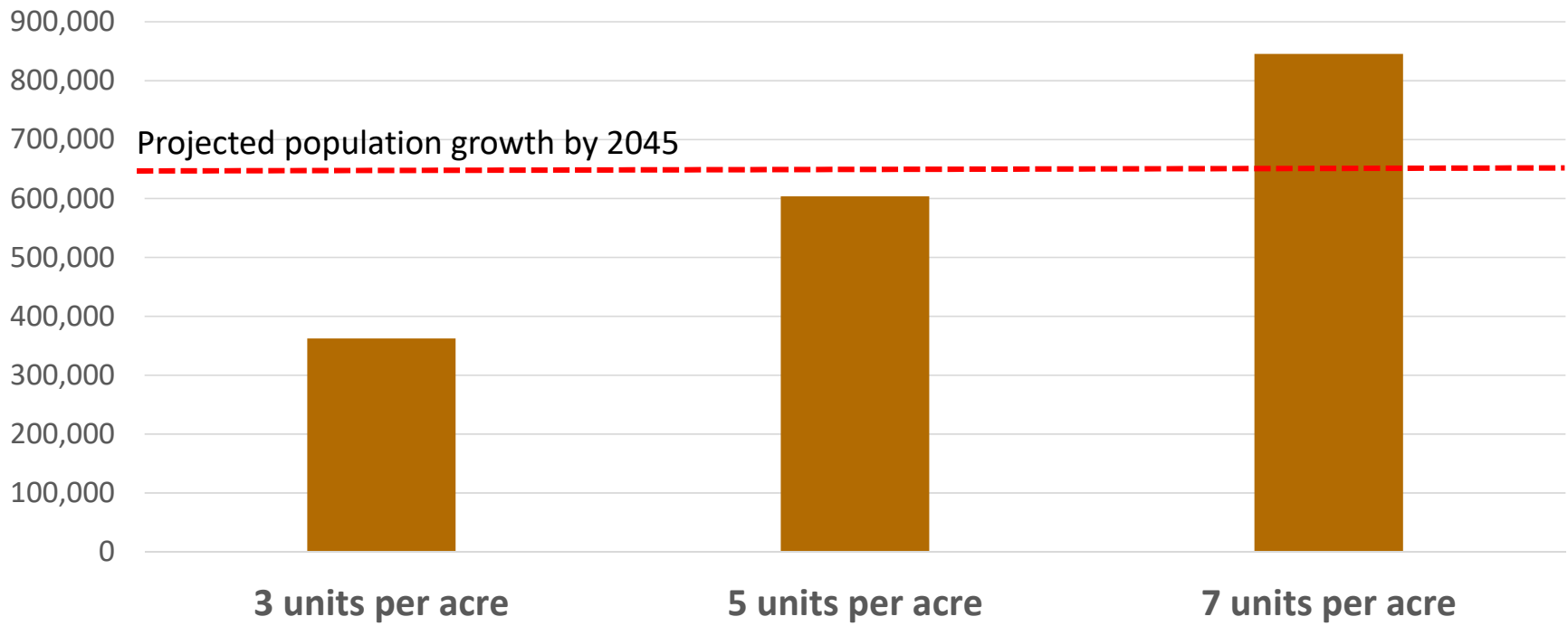
2045 Population and Employment Projections

# Carrying capacity

- Hillsborough County will add roughly 630,000 people and 340,000 jobs by 2045<sup>1</sup>.
- There are approximately 75,000 acres of unconstrained vacant and redevelopable land within the USA and Plant City.
- Assume 52,500 acres (70%) are residential and 22,500 acres (30%) are non-residential.

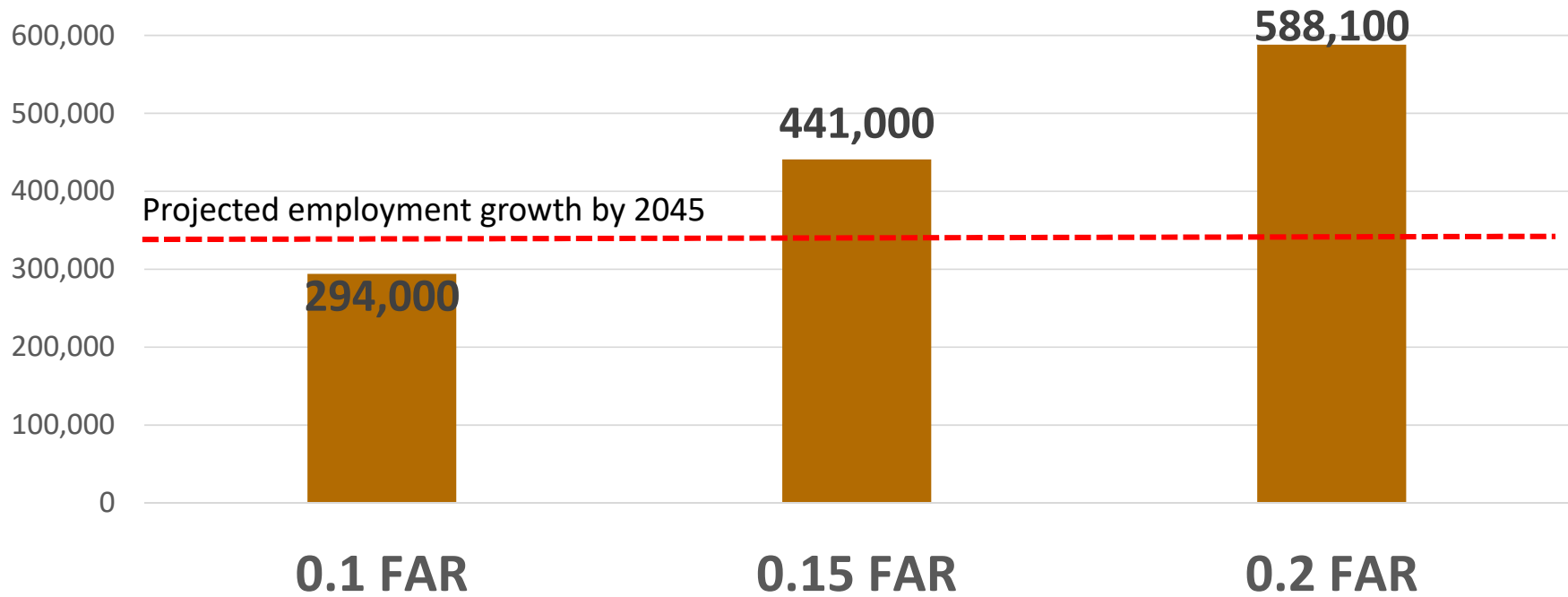
<sup>1</sup> Based on BEBR medium projection and current population to employment ratio.

# How much population can 52,500 acres accommodate?

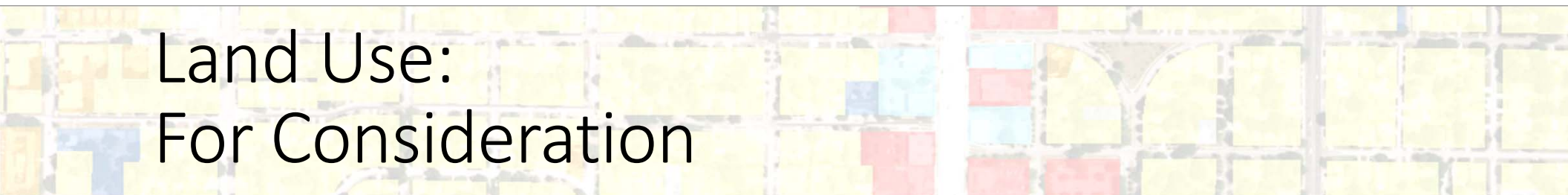


Assumes 2.3 persons per household.

# How much employment can 22,500 acres accommodate?



Assumes 3 employees per 1,000 square feet.



# Land Use: For Consideration

- We will likely consume all developable land before 2045.
- How will the market respond?
- Redevelopment, infill and intensification.
- Growth pressure on USA expansion.

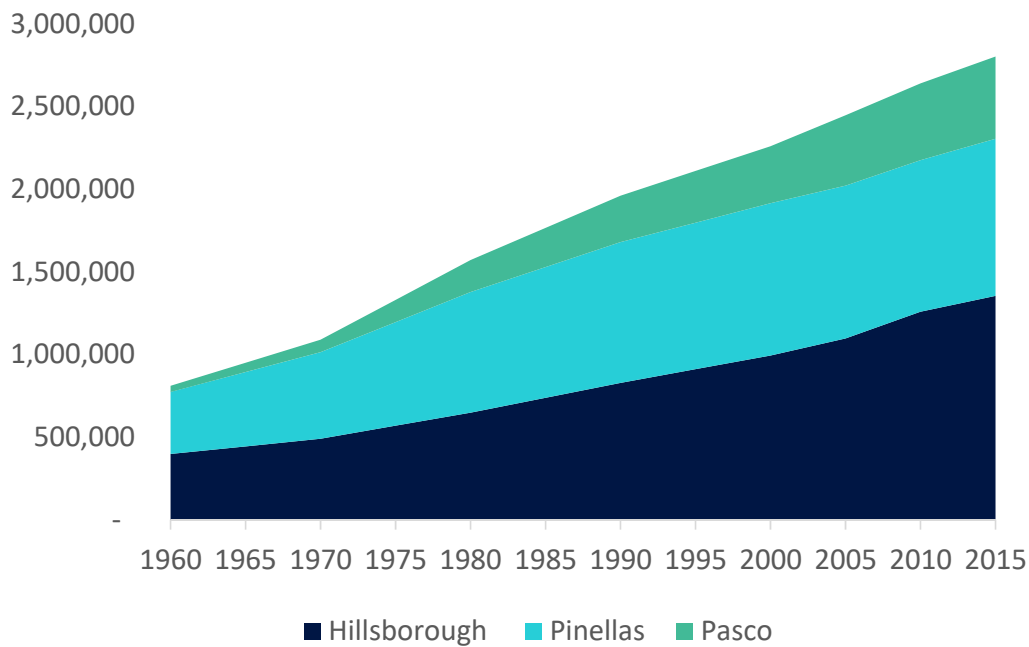
# Population and Demographic Trends: Key Findings

- 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)

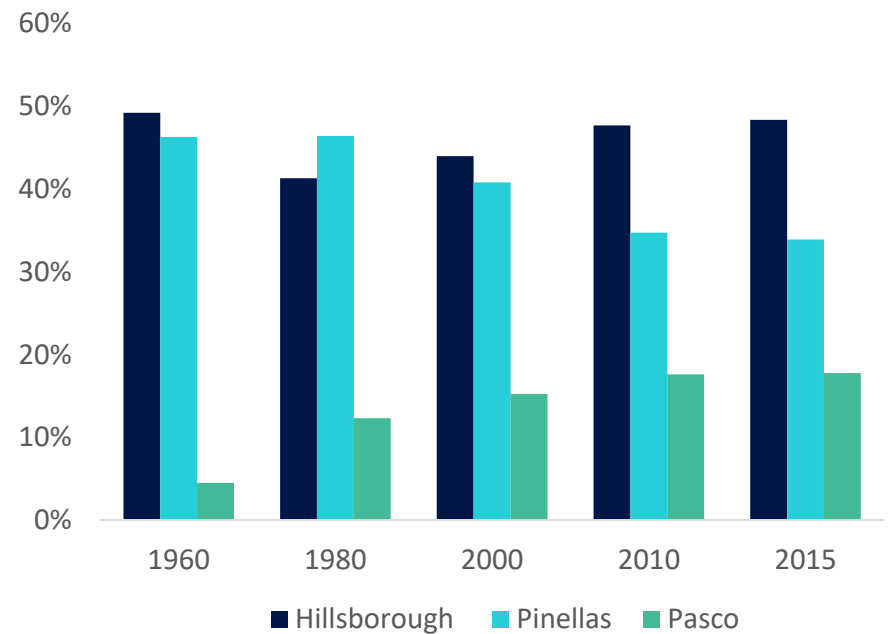
# Population and Demographic Trends

## Population Growth

Tri-County Population Growth



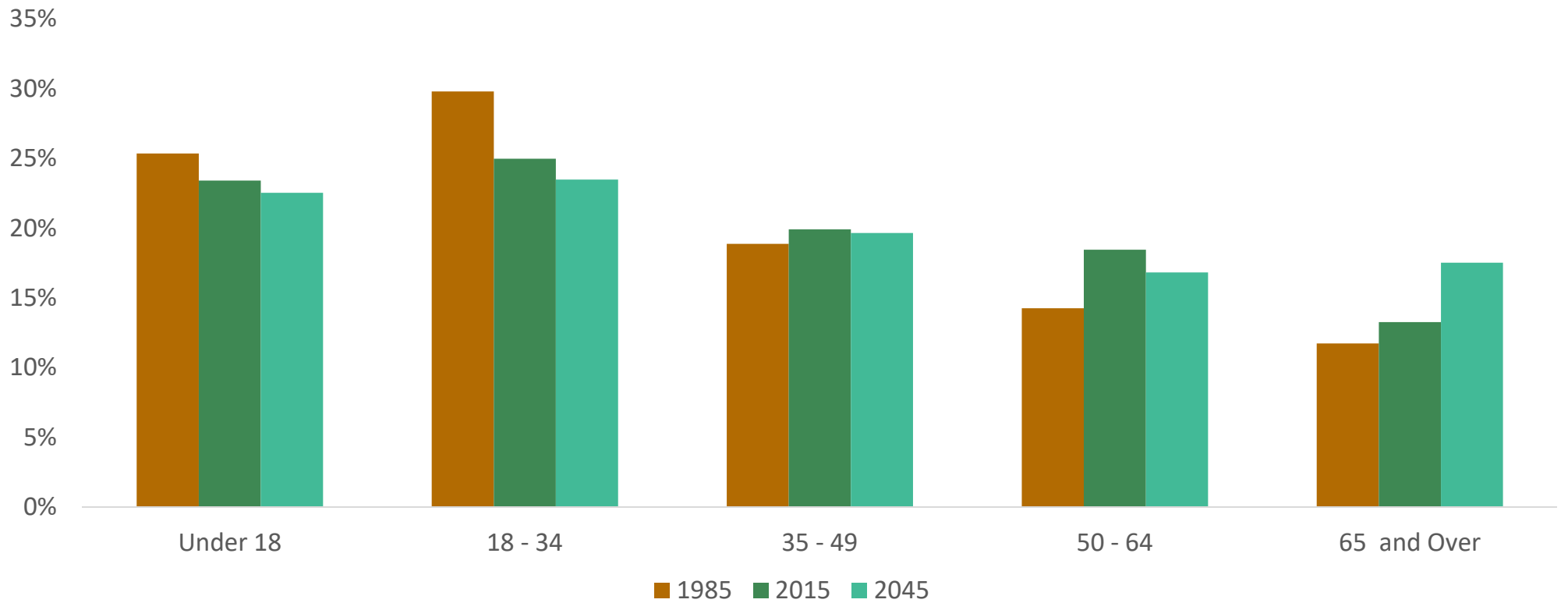
Percent of Tri-County Population





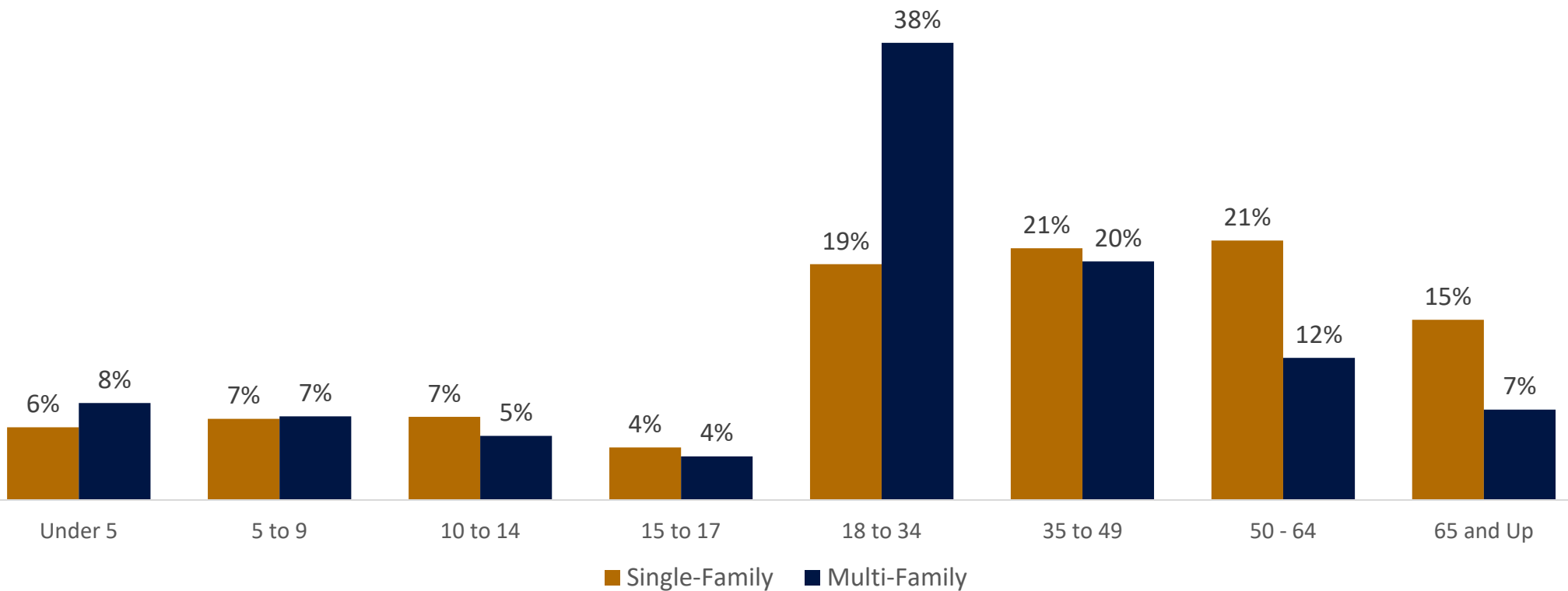
# Population and Demographic Trends

## Age Cohorts



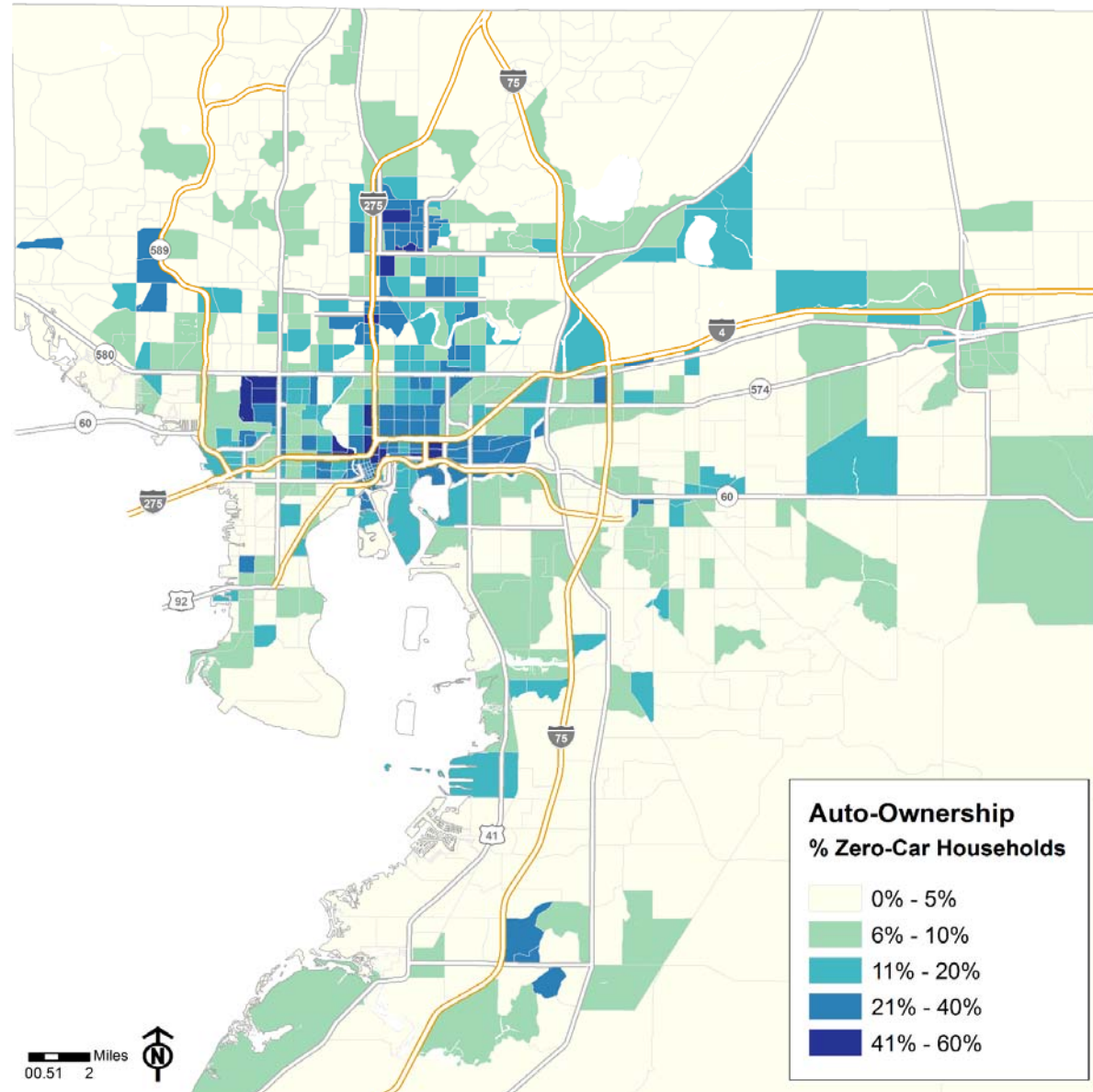
# Population and Demographic Trends

## Age Cohorts by Housing Type



# Population and Demographic Trends

## Auto Ownership



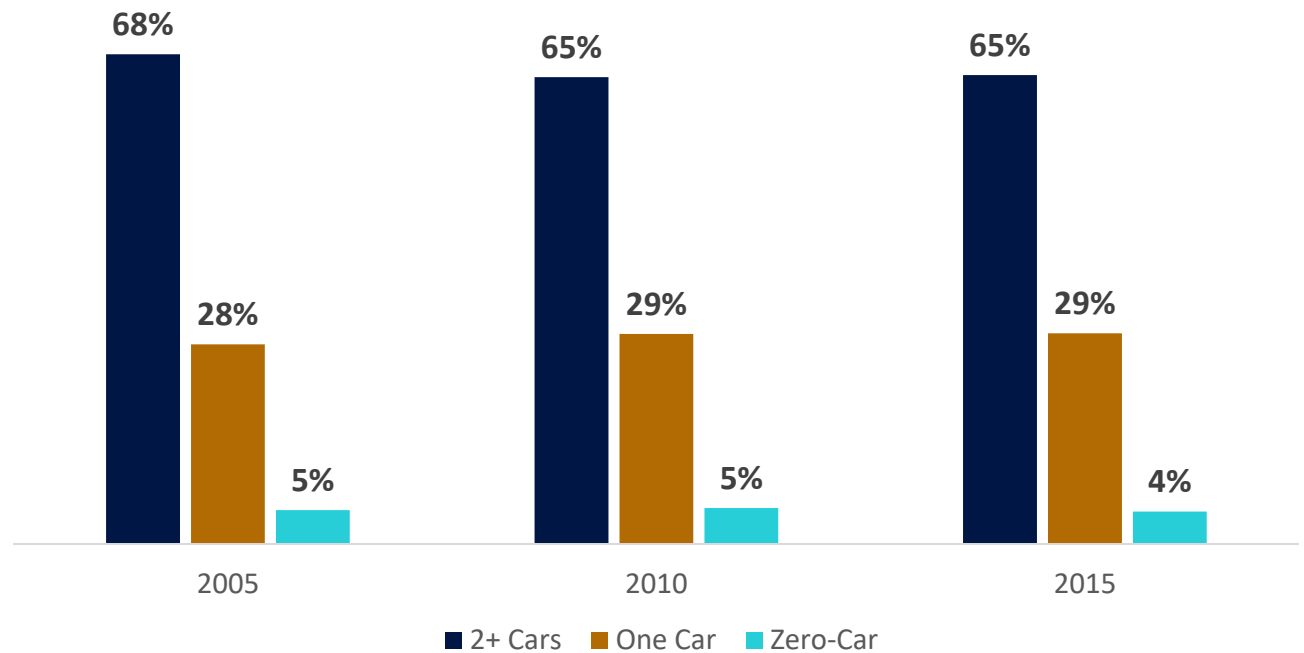
Source: U.S. Census Bureau, 2011-2015 American Community Survey  
5-Year Estimates



2045 Population and Employment  
Projections

# Population and Demographic Trends


## Auto Ownership



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



2045 Population and Employment Projections

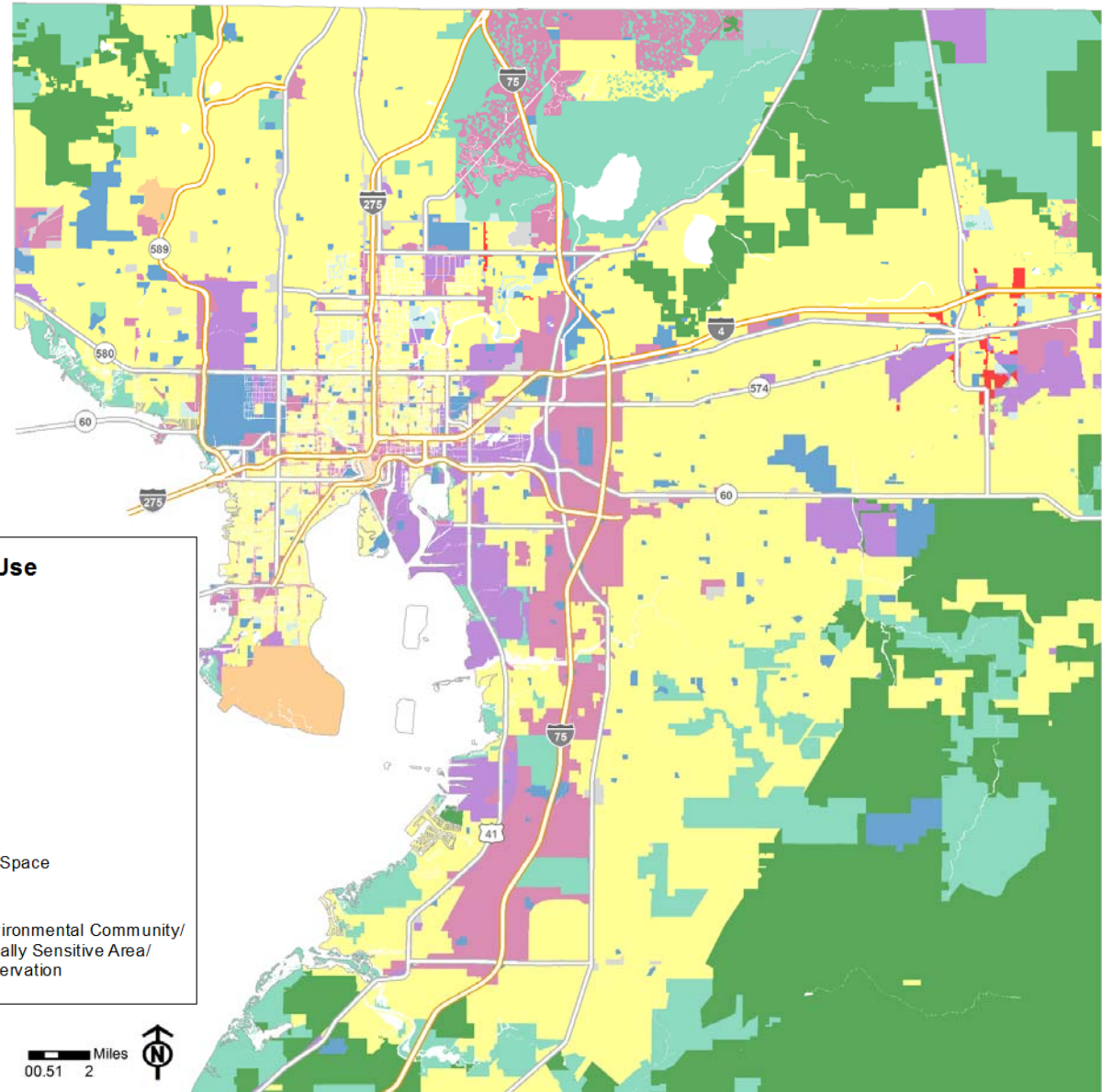


# Demographics: For Consideration

- Shrinking household size and implications for housing choice.
- As millennials age, will they continue to opt for multi-family housing?
- Will older age cohorts continue to opt for single family housing?
- Will auto ownership remain stable?
- Potential for non-SOV travel as county becomes more intense and mixed.

# Future Land Use

## Character



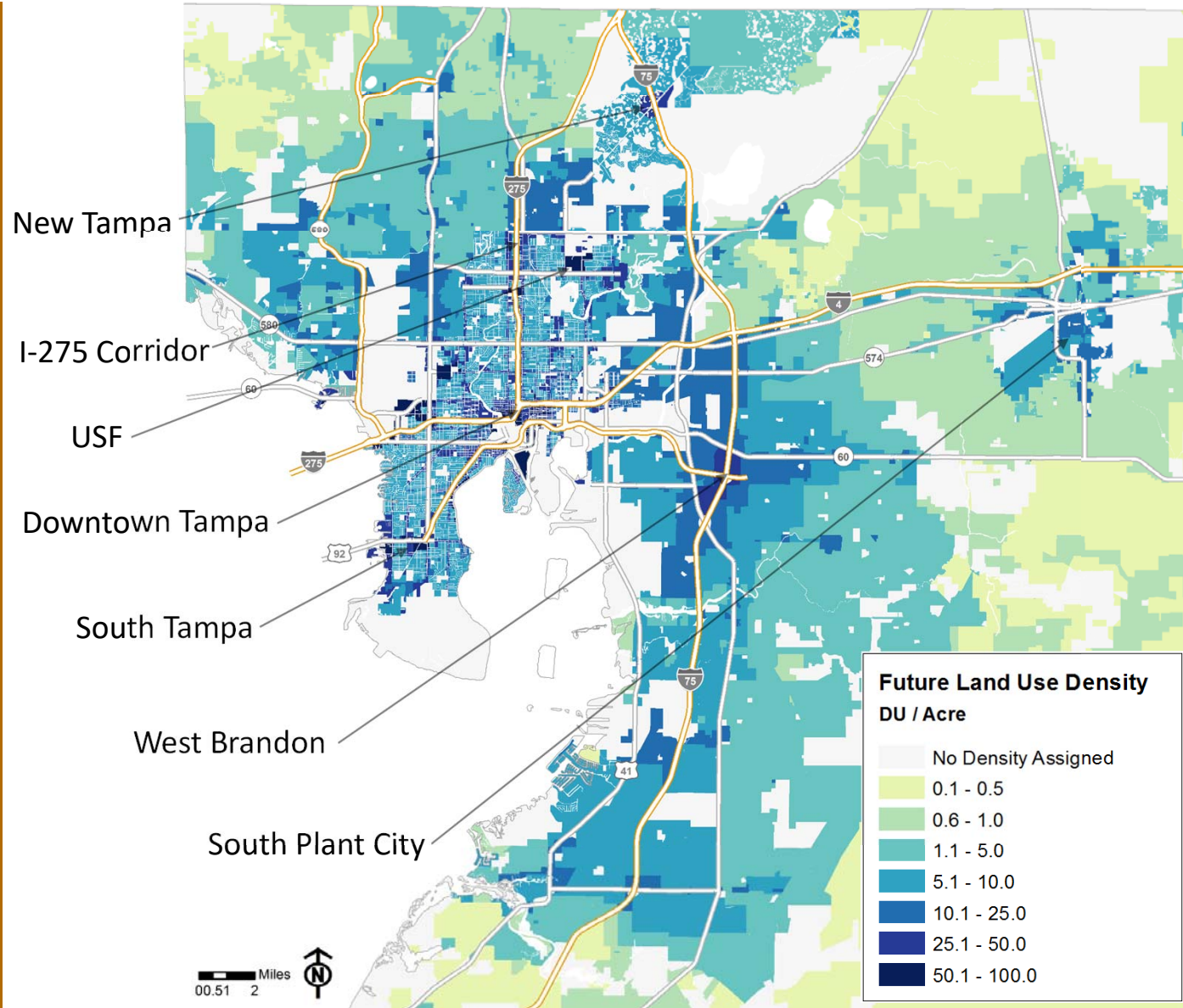
Source: Hillsborough County MPO



2045 Population and Employment Projections

# Future Land Use

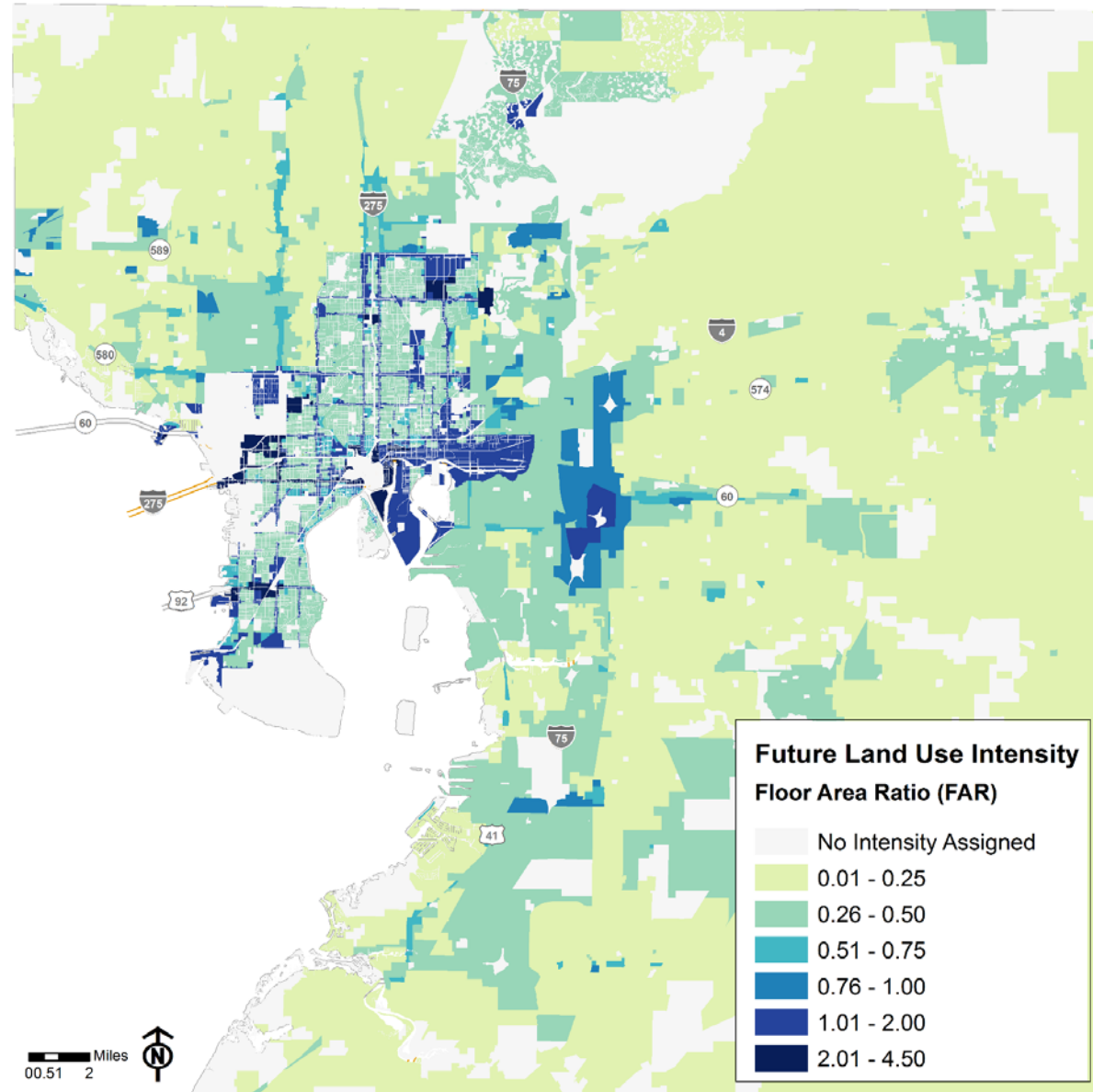
## Density



Source: Hillsborough County MPO

# Future Land Use

## Intensity



Source: Hillsborough County MPO



2045 Population and Employment Projections





# Plans and Policies: For Consideration

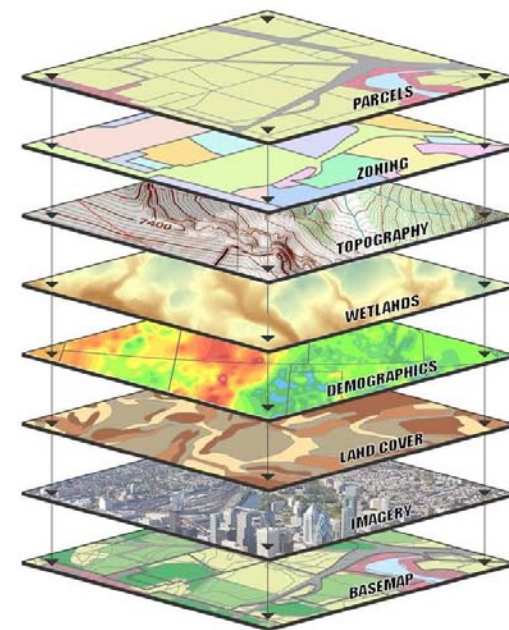
- Will market realize higher densities and intensities?
- Is it enough to accommodate growth?
- Are we on the right track for:
  - Coordinated transportation and land use?
  - Efficient provision of public services?
  - Preservation of natural and aesthetic assets?

An aerial photograph of a city grid with various colored overlays. Yellow and light green areas represent high suitability, while red and blue areas represent lower suitability. The text is overlaid on the map.

*Where will growth go?*  
Suitability Analysis

# Suitability Analysis

- “Rates” land for development.
- Based on factors that you decide.
- Weighting give some factors importance over others.



# Suitability Factors

**H** = High influence

**M** = Medium influence

**L** = Low influence

Criteria	Residential	Commercial	Industrial
Expressway access	M	H	L
Urban services	H	H	H
Utilities*	H	H	H
Transit	H	H	
Airport access		L	L
Intermodal access			H
Rail access			M
Walkability*	H	H	
Arterial frontage		M	
Population proximity*	H	M	
Jobs proximity	M	H	
USF proximity	L	H	
Waterfront access	M	M	
Growth hotspot (residential)	H		
Growth hotspot (non-residential)	M	H	
Coastal Hazard Zone	M	L	L
Floodplain	M	L	L
School proximity	H		
Park and greenway proximity*	H		

*\*Pending updates*

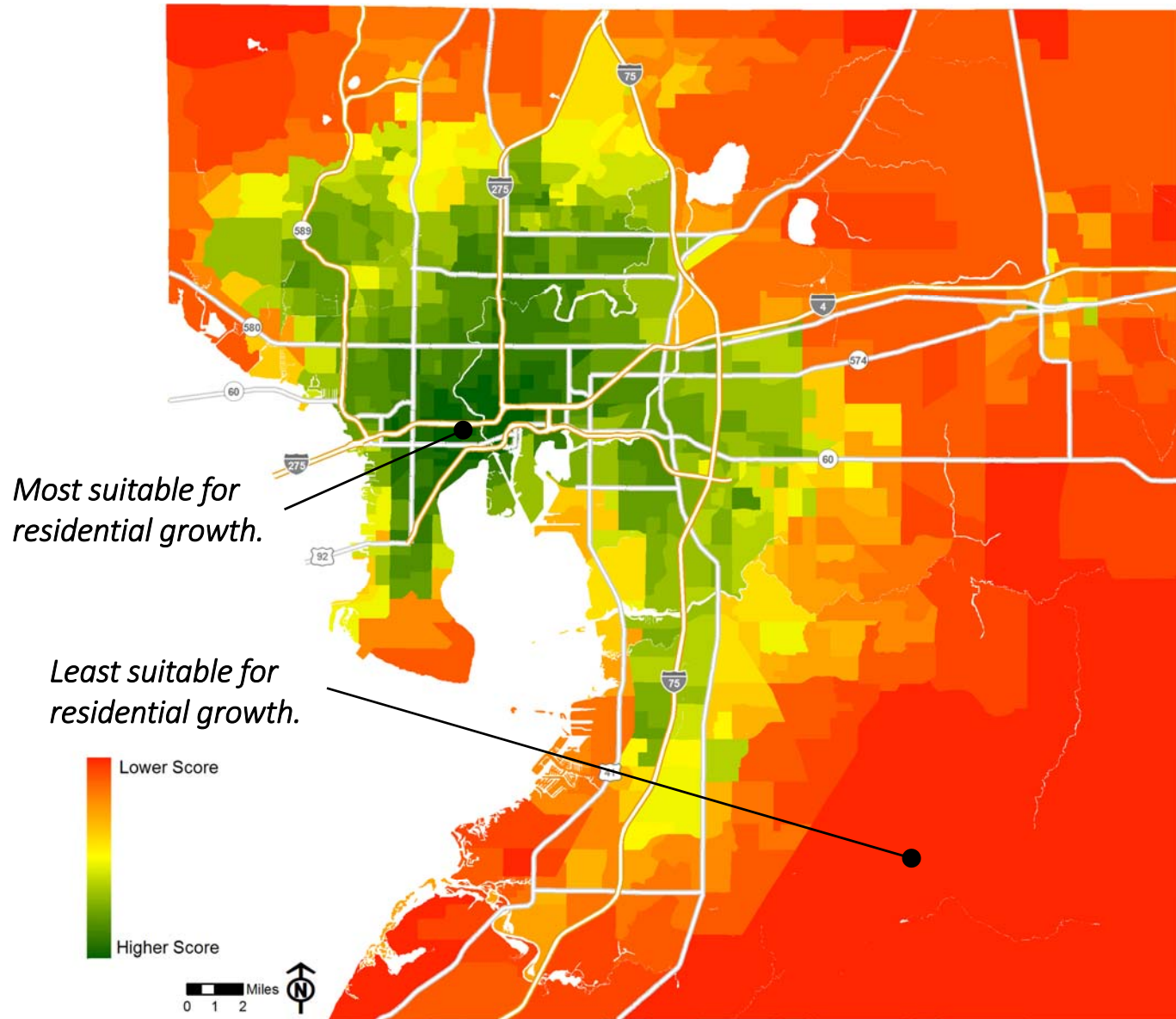
# Suitability Score *Residential*

*The higher the score, the  
more suitable for  
development*

# DRAFT



2045 Population and Employment  
Projections



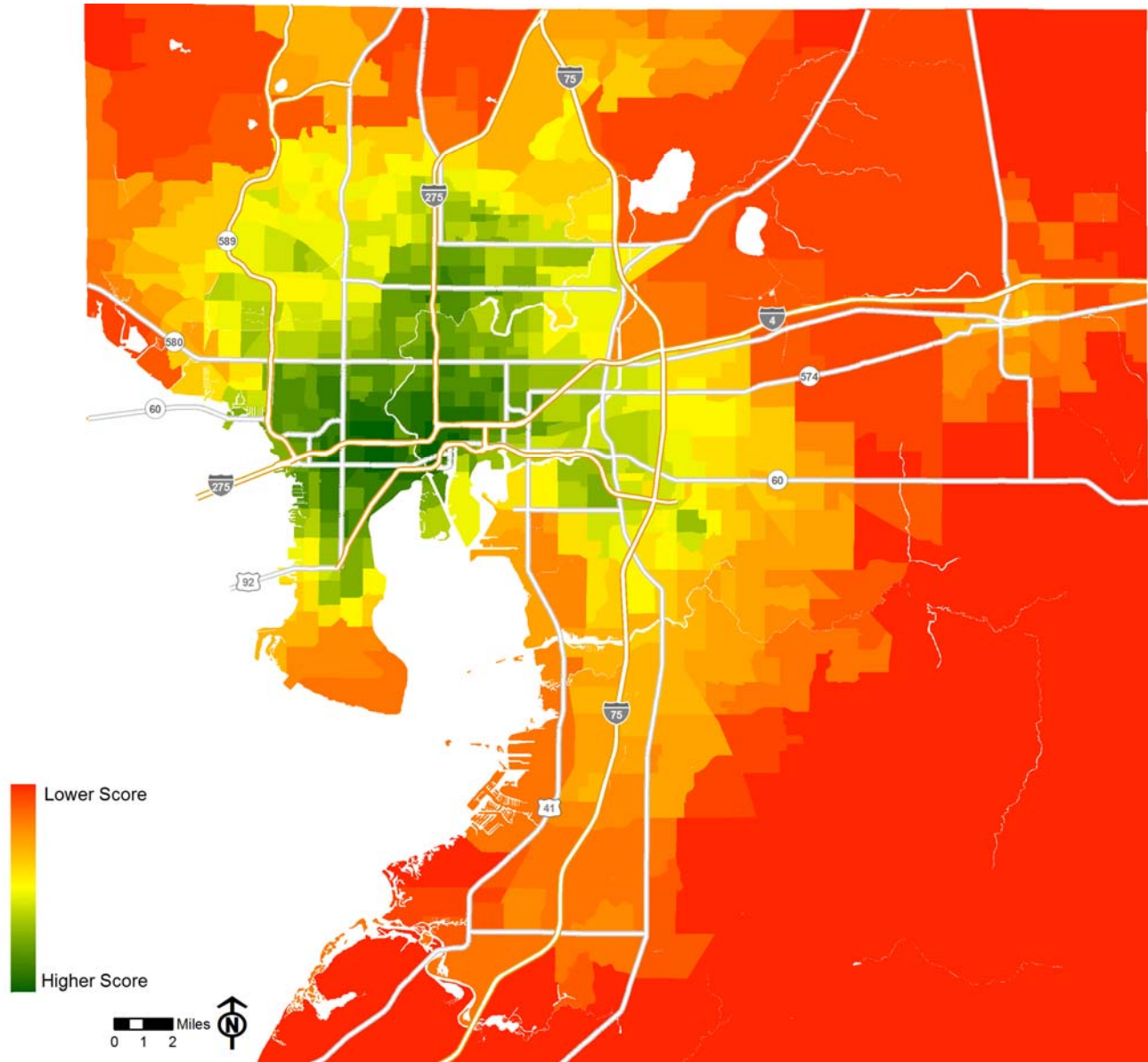
# Suitability Score *Commercial*

*The higher the score, the  
more suitable for  
development*

# DRAFT



2045 Population and Employment  
Projections



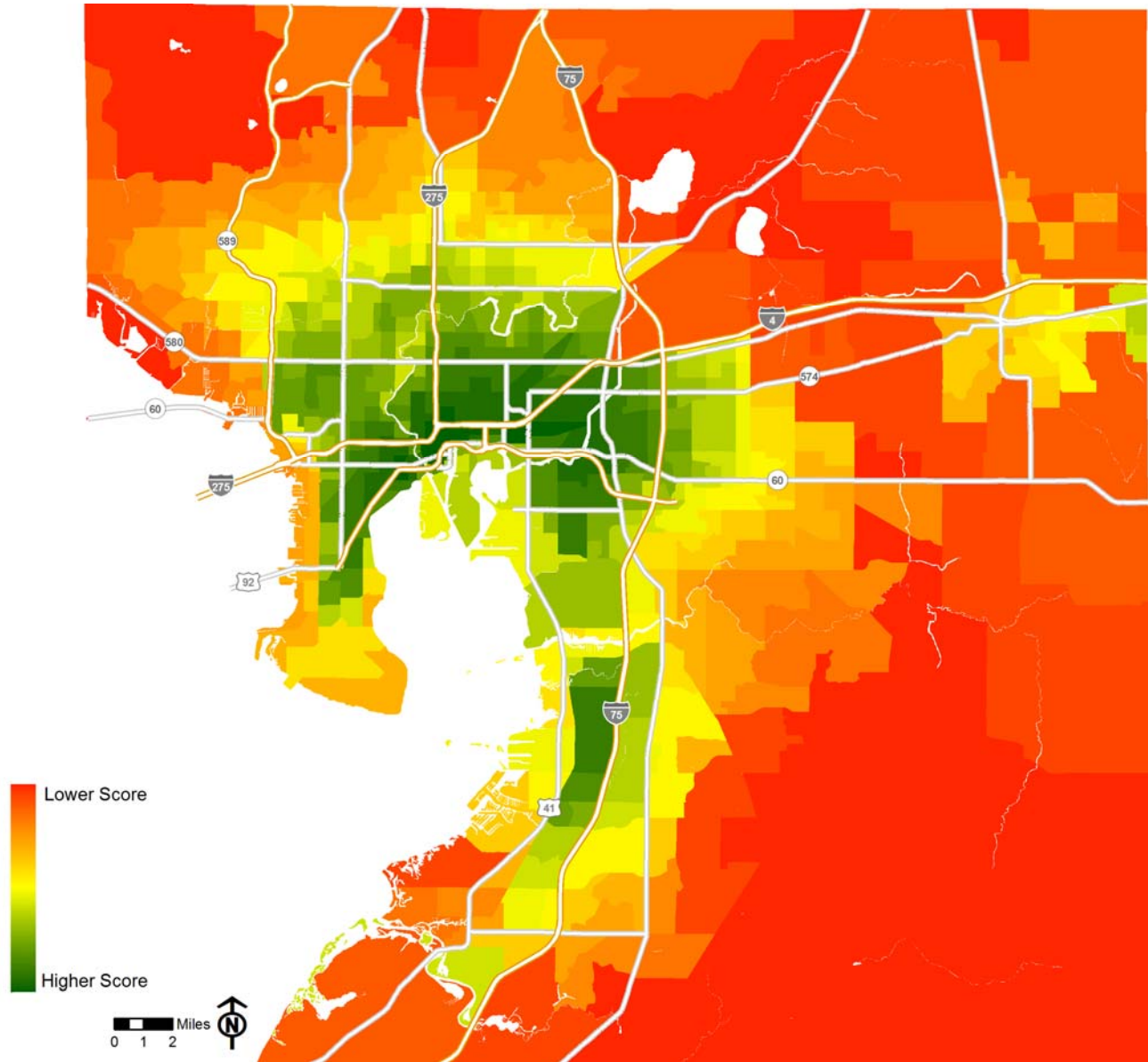
# Suitability Score *Industrial*

*The higher the score, the  
more suitable for  
development*

# DRAFT



2045 Population and Employment  
Projections



An aerial photograph of a city grid with various colored overlays. Yellow covers most of the residential areas. Red highlights specific blocks, possibly commercial or industrial. Blue and green highlight other specific areas, possibly parks or public facilities. The text 'Next Steps' is overlaid on the map in a large, black, sans-serif font.

# Next Steps





# Timeline

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