



# 2045 Population and Job Growth: Update

MAY 7, 2019





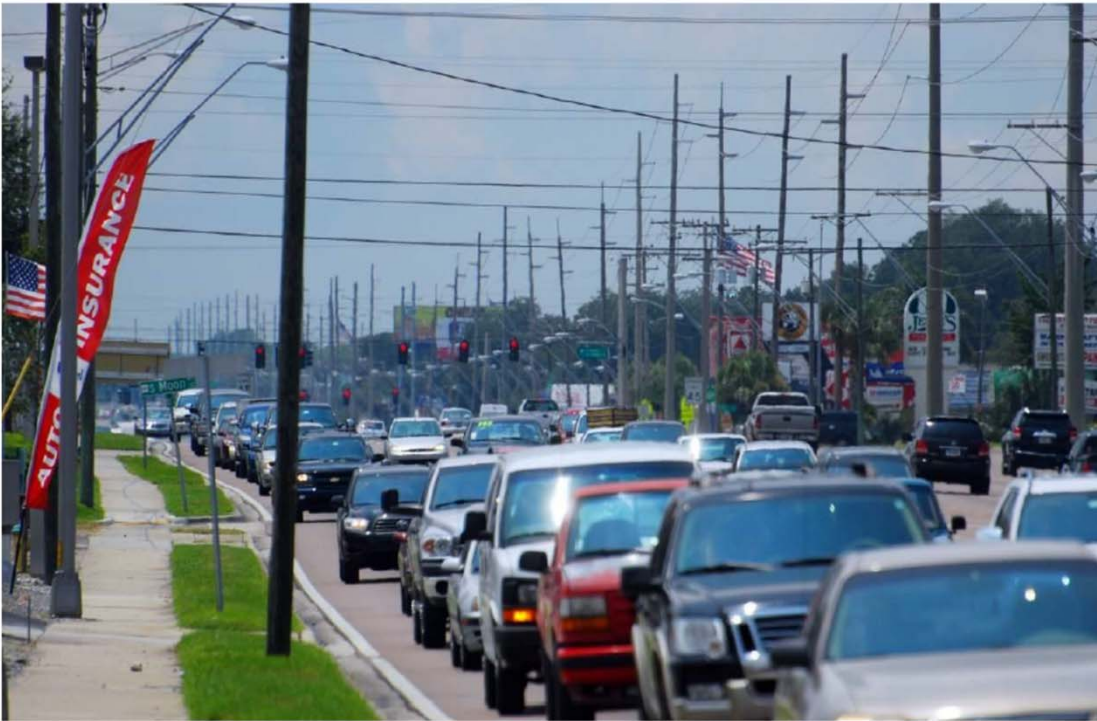
## Why look at Population Projections?

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- A tool to inform future decisions
- Context to planning decisions
  - Inform the plan but are not the Plan
- Frame investments in infrastructure

## Joe Henderson: People keep moving to Tampa. What kind of place are they going to find?

The lack of political will by the County Commission – for decades – to deal with runaway sprawl led to many of the problems we now see.



Tampa Bay Times 4/25/19

Hillsborough County grew by 27,000 residents last year

“We celebrate growth around here, and we have had a lot of practice doing that.

We just need to do it properly.”

# We can influence the future...

- What will Hillsborough County look like in 30 years?
- Where will we grow?
- How will we grow?
- What does this mean for...
  - Transportation
  - Jobs
  - Housing
  - Infrastructure
  - Schools



# Guiding Principles for How We Grow

ADOPTED JULY 29, 2015



## Quality of Life

- Respect diversity of Urban, Suburban, Semi-Rural, and Rural choices. (i.e. Form Based Code can help deliver these lifestyle options)
- Preserve environmentally significant land
- Maintain viable agricultural lands



## Fiscal Sustainability

- Prioritize limited resources
- Leverage private capital investments
- Capitalize on existing infrastructure
- Provide alternative mobility options
- Use the right tools for the right setting (i.e. Special Assessment District)



## Economic Prosperity

- Protect competitive sites for future job creation
- Incentivize economic objectives and affordable housing
- Link infrastructure spending to private capital investment
- Use the right tools for the right setting



## Responsible Growth

- Recognize the difference between stable and transition areas
- Redevelop declining commercial and industrial areas
- Structure mobility fee to incentivize a productive development pattern
- Use the right tools for the right setting (i.e. TDR Program)



## Consistency of Action

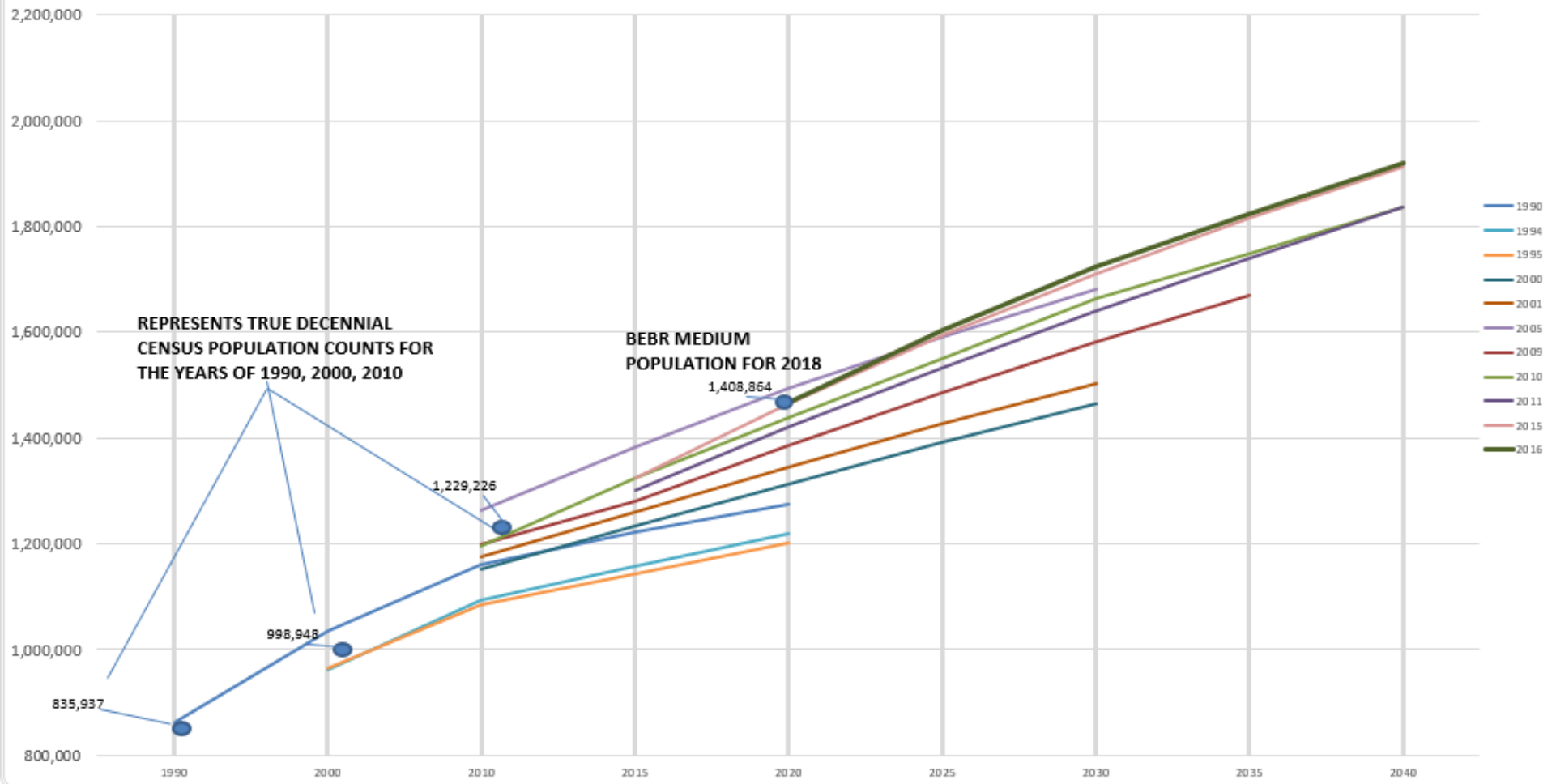
- Provide certainty for community and development industry
- Align programs and investment decisions
- Link capital improvement program, land use, and development standards

# Projecting Hillsborough County's population

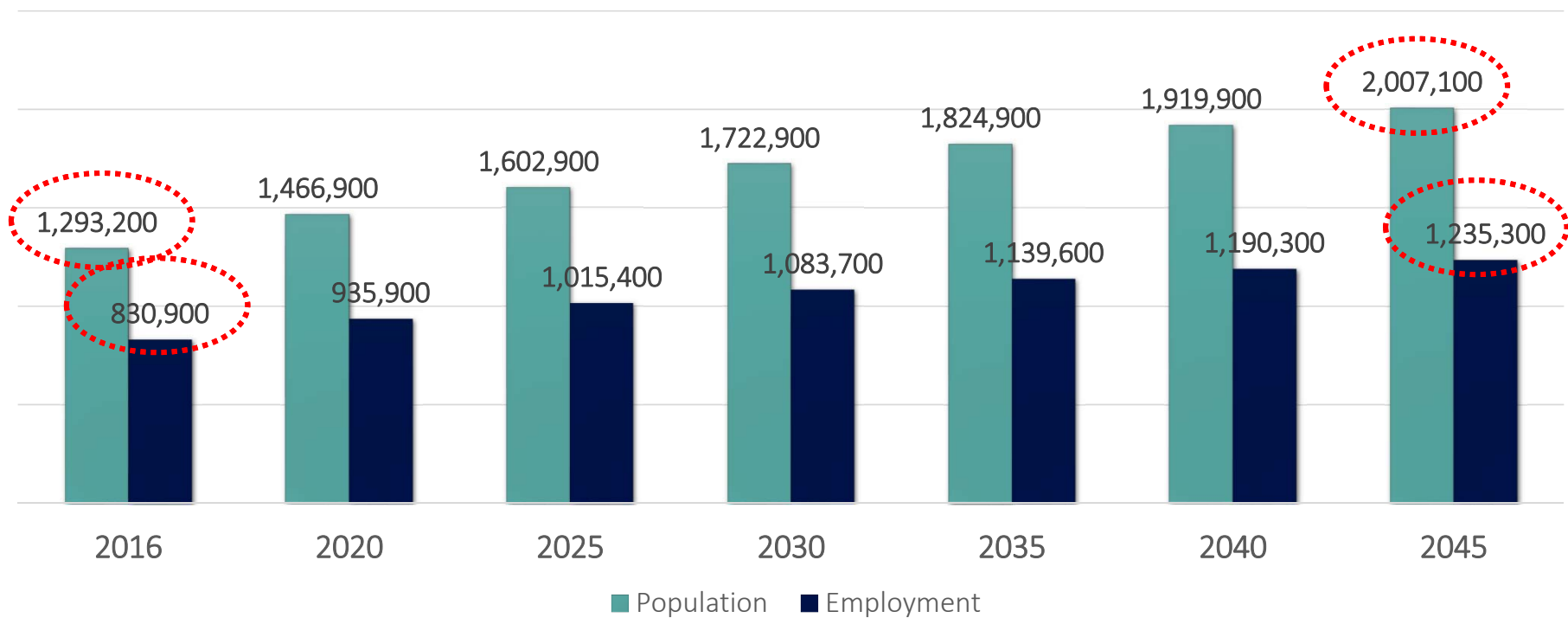
- Bureau of Economic and Business Research (BEBR)
  - Medium Level Projection
- Takes into account:
  - Birth rates
  - Death rates
  - In and out migration



## BEBR POPULATION PROJECTIONS (1990-2016) MEDIUM PROJECTIONS

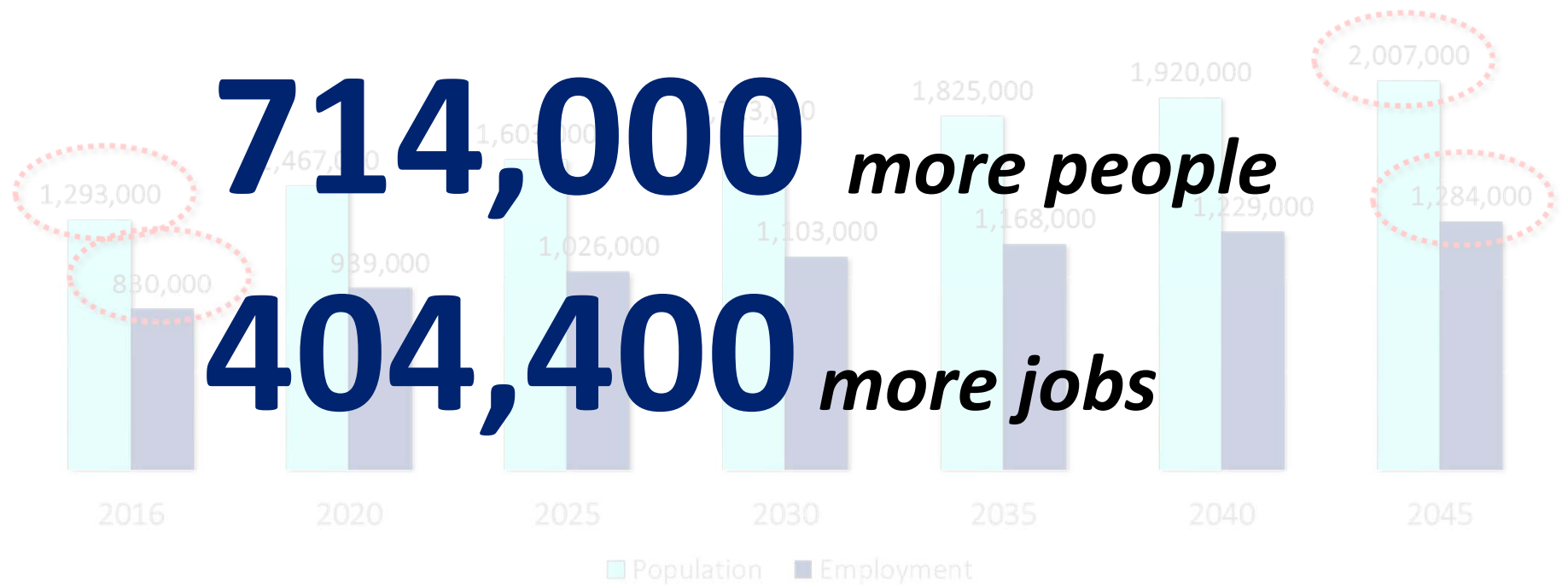


# What does the future look like?





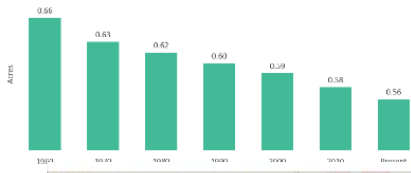
# What does the future look like?



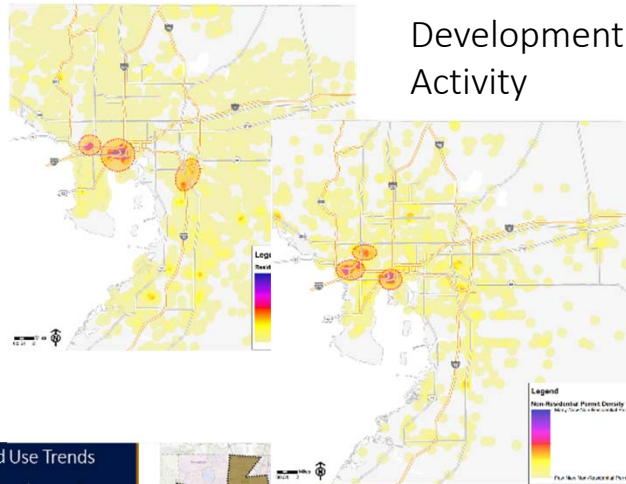
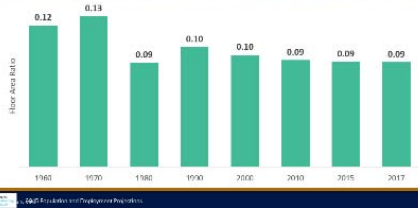
# Trend analysis and planning assumptions

## Land use

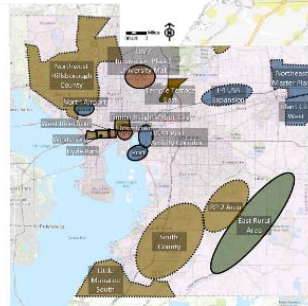
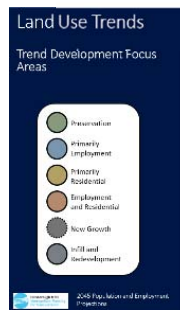
Residential Growth Trends  
Single-Family Residential Lot Size



Employment Growth Trends  
Non-Residential Intensity

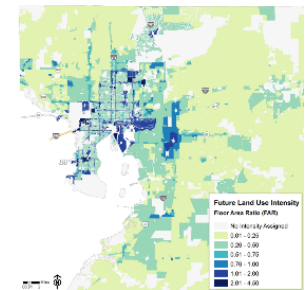


Development Activity



## Policy

Future Land Use  
Intensity

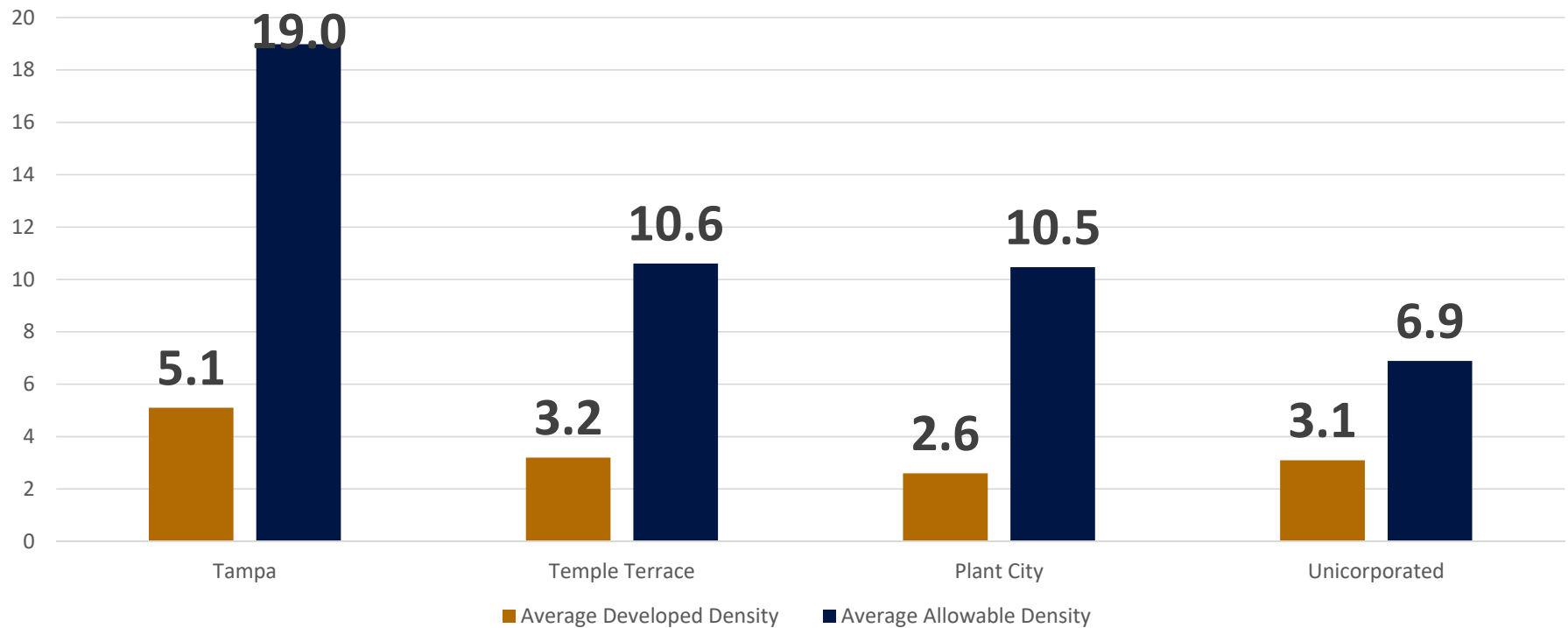


## Demographics

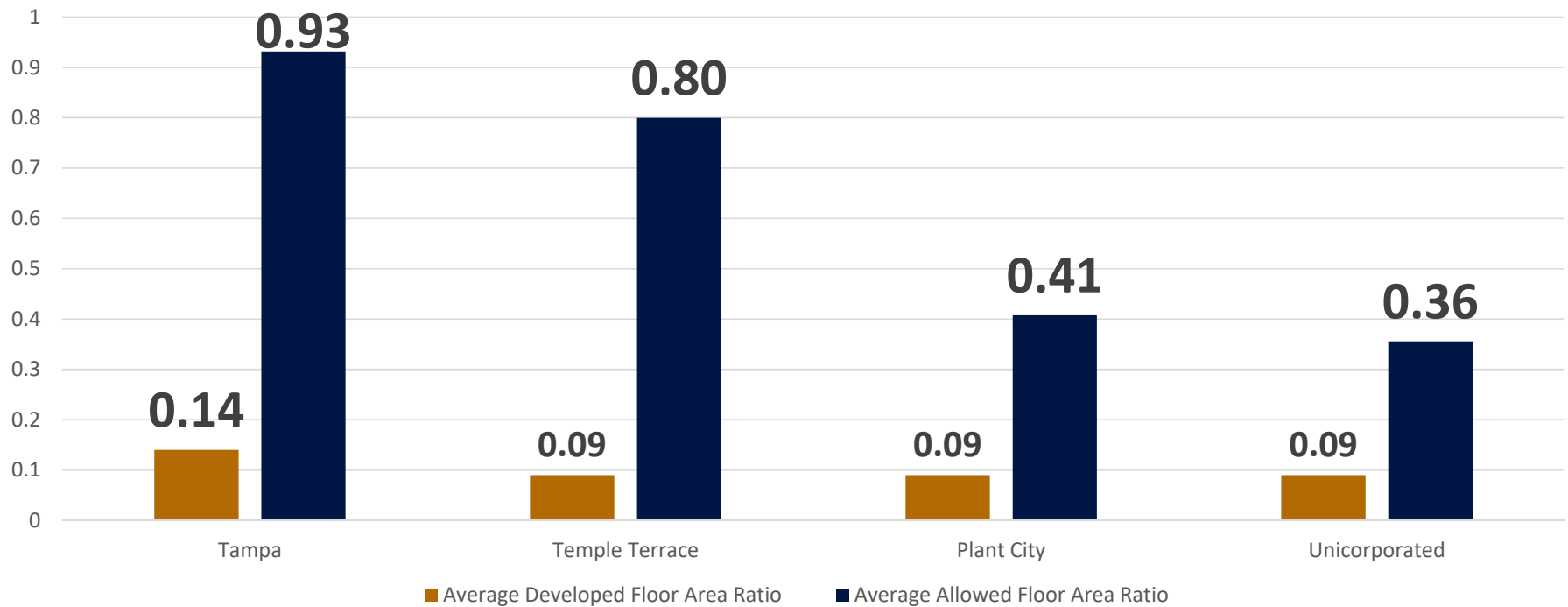
Population and Demographic Trends  
Age Cohorts by Housing Type



# Comparison of Average Allowable Densities to Average Developed Densities



# Comparison of Average Allowable Floor Area Ratios to Average Developed Floor Area Ratios



# Land for Future Development and Redevelopment

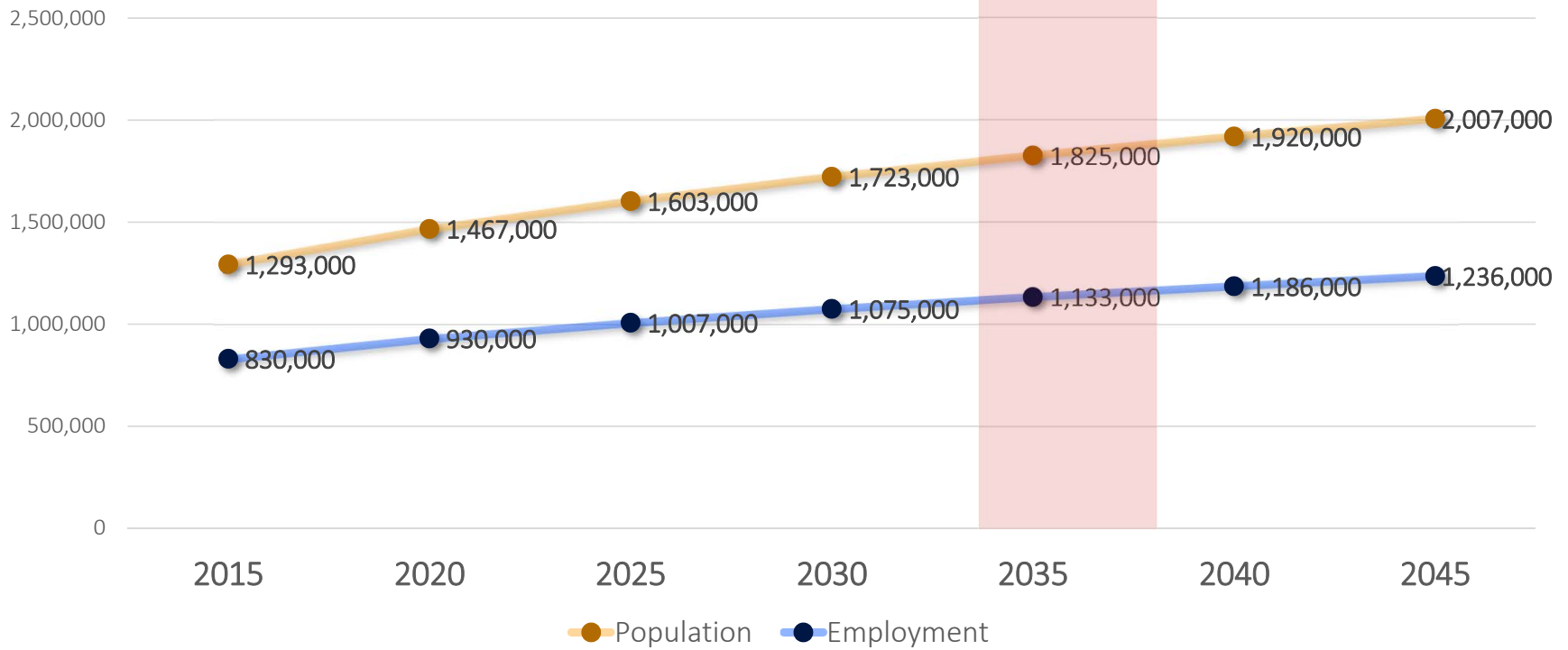


**49,600** *acres*

*Vacant, developable and redevelopable land within the Urban Services Area and 3 Cities.*

# If we continue current trends, we are reaching “Buildout”

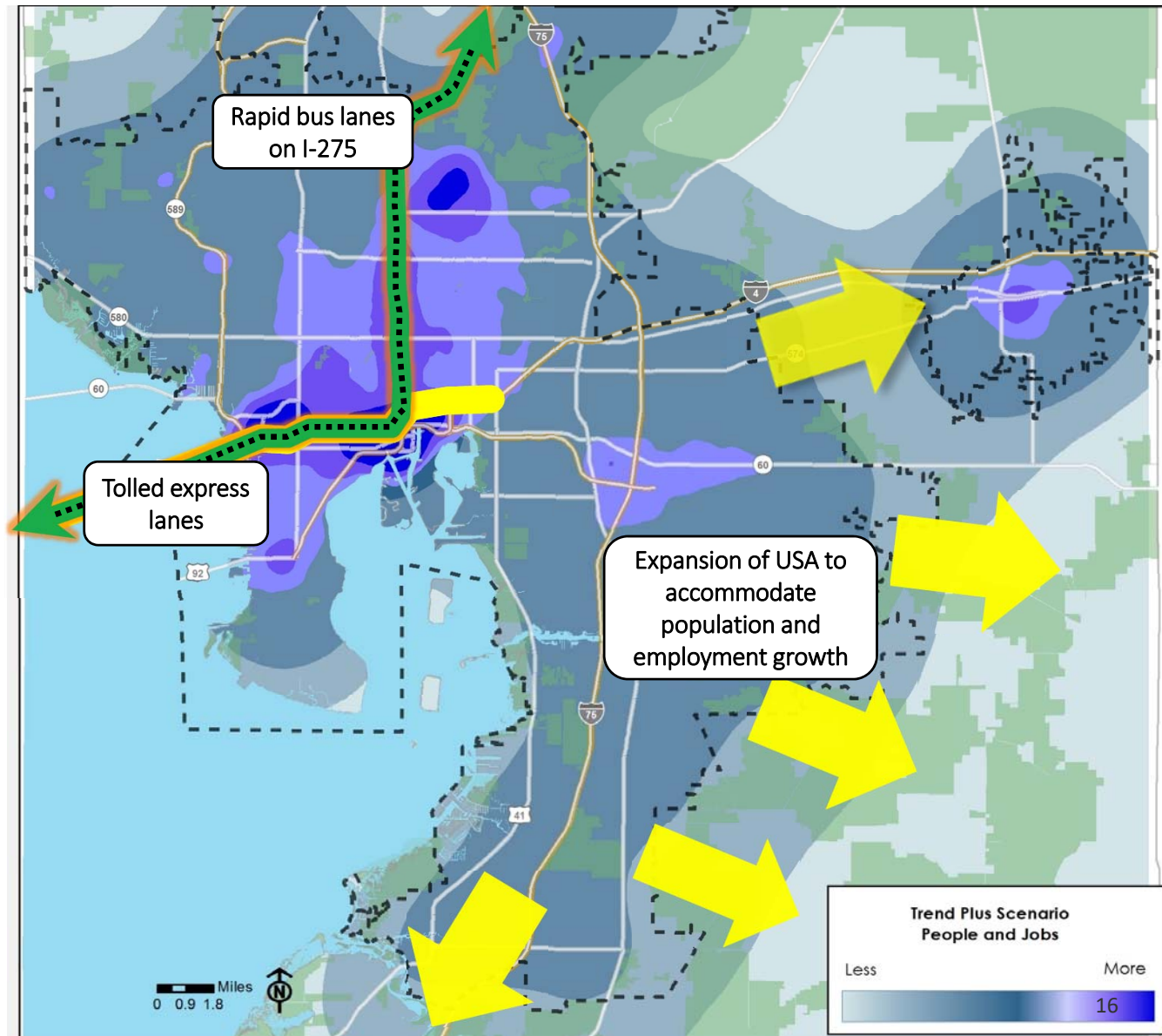
Approximate Buildout of USA & Cities



How will we respond?  
We have options...

# Trend Scenario

- Continuation of existing trends
- Outward expansion
- Market driven redevelopment and intensification
- Highway investment with transit





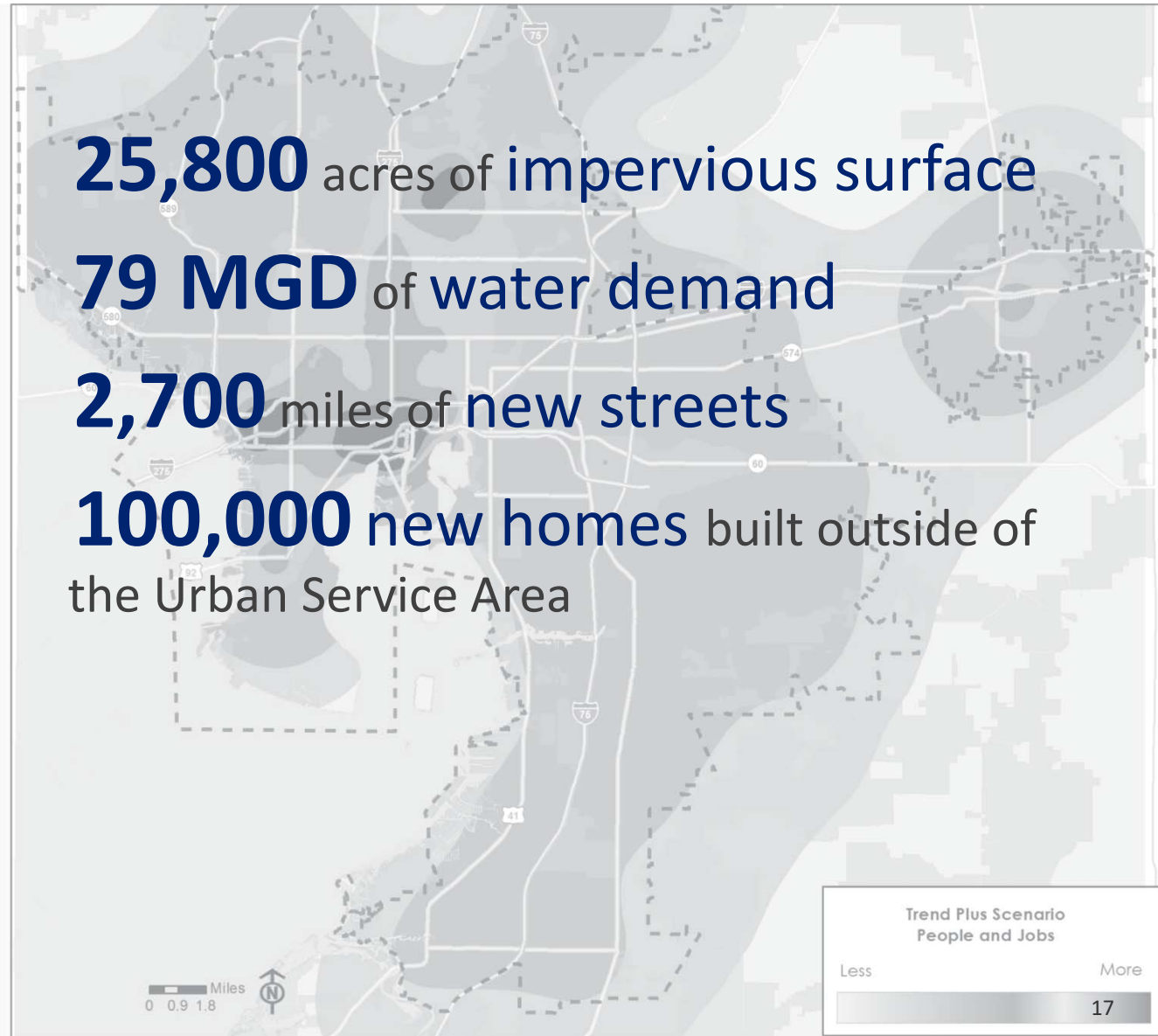
# Trend Scenario

**25,800** acres of impervious surface

**79 MGD** of water demand

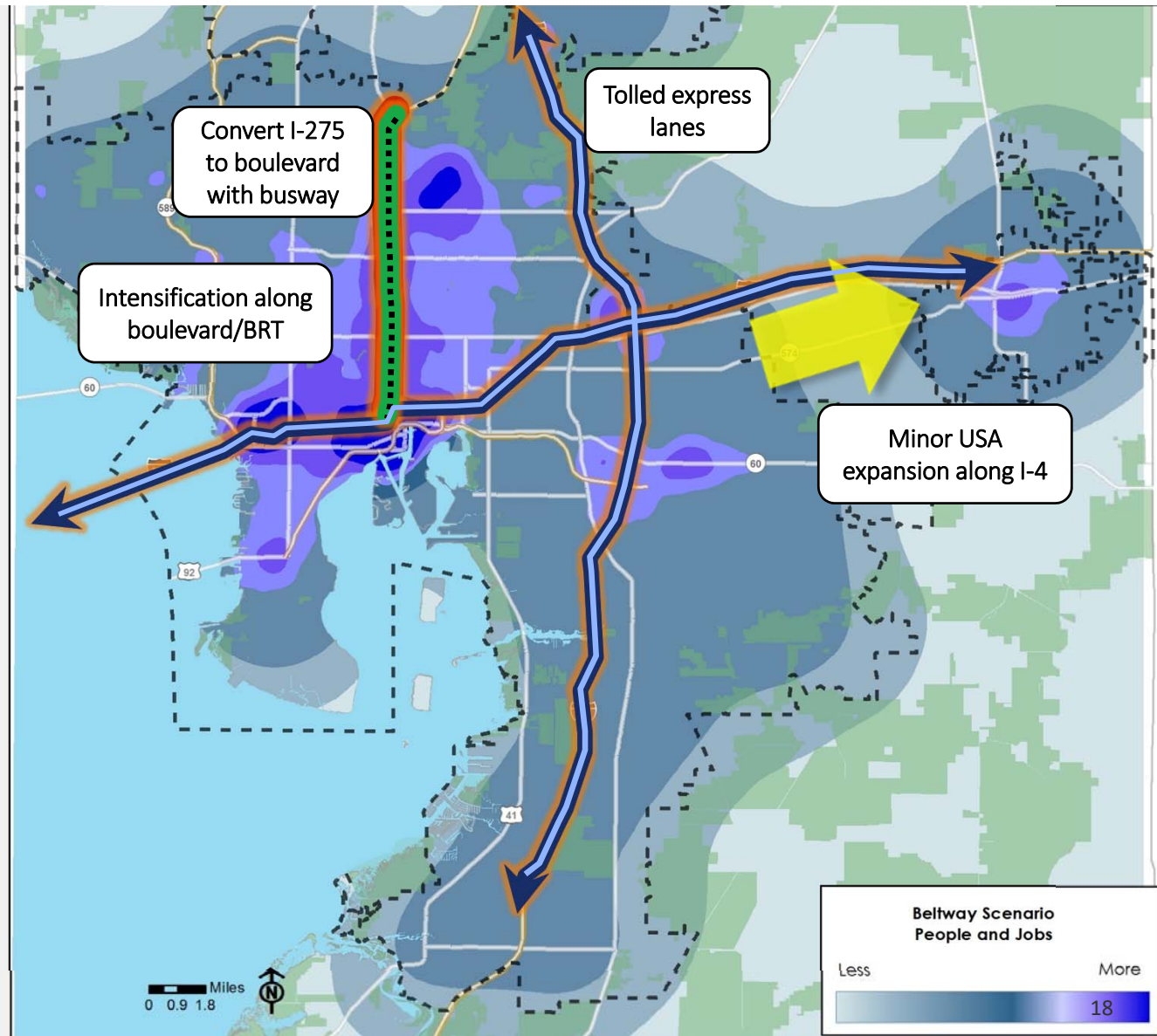
**2,700** miles of new streets

**100,000** new homes built outside of the Urban Service Area



# Belt and Boulevard Scenario

- Reinvent I-275 as a boulevard with busway
- Focus of redevelopment and intensification
- Tolled express lanes
- Some expansion along I-4
- Less population growth in Hillsborough and more in adjoining counties



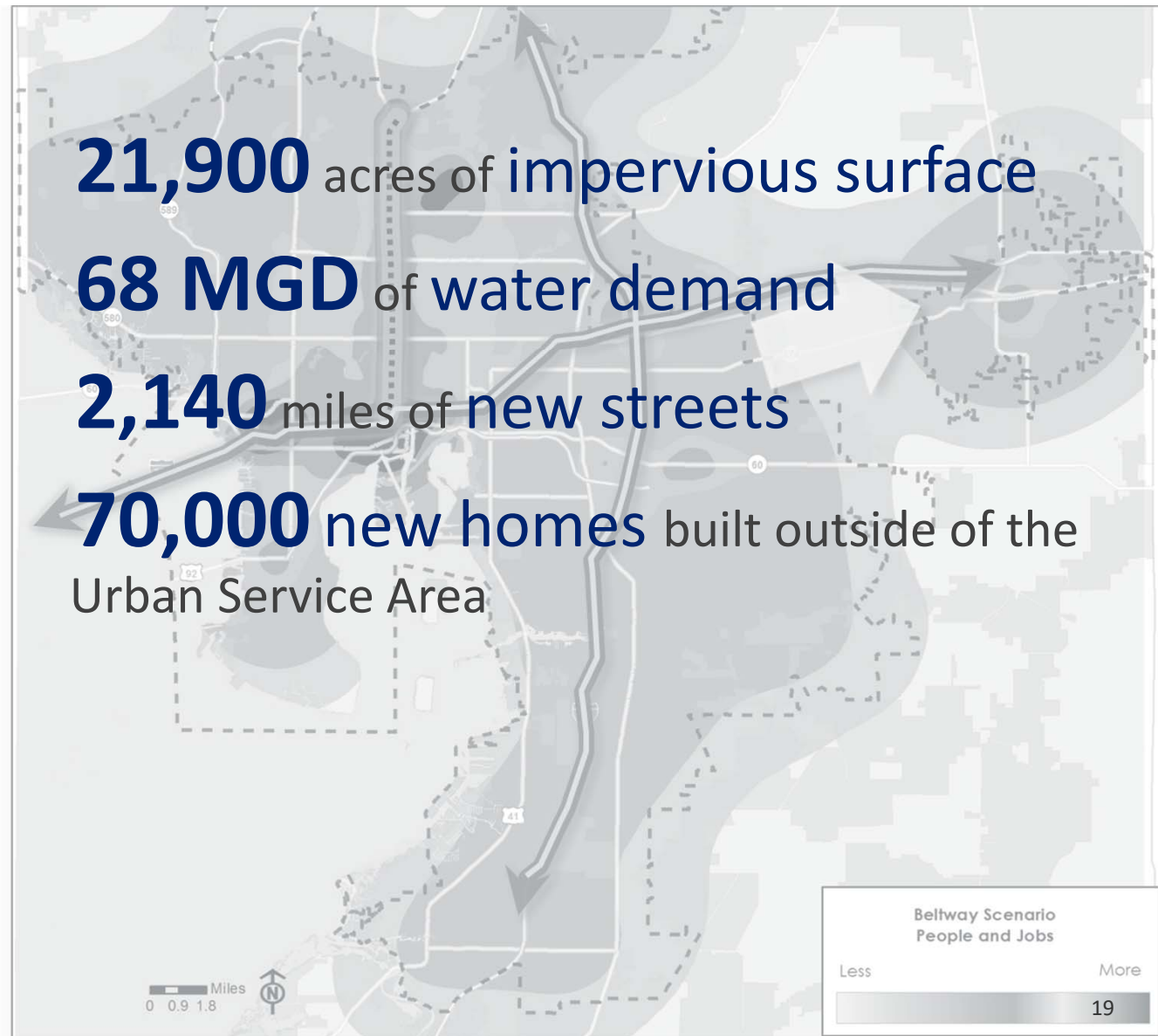
# Belt and Boulevard Scenario

**21,900** acres of impervious surface

**68 MGD** of water demand

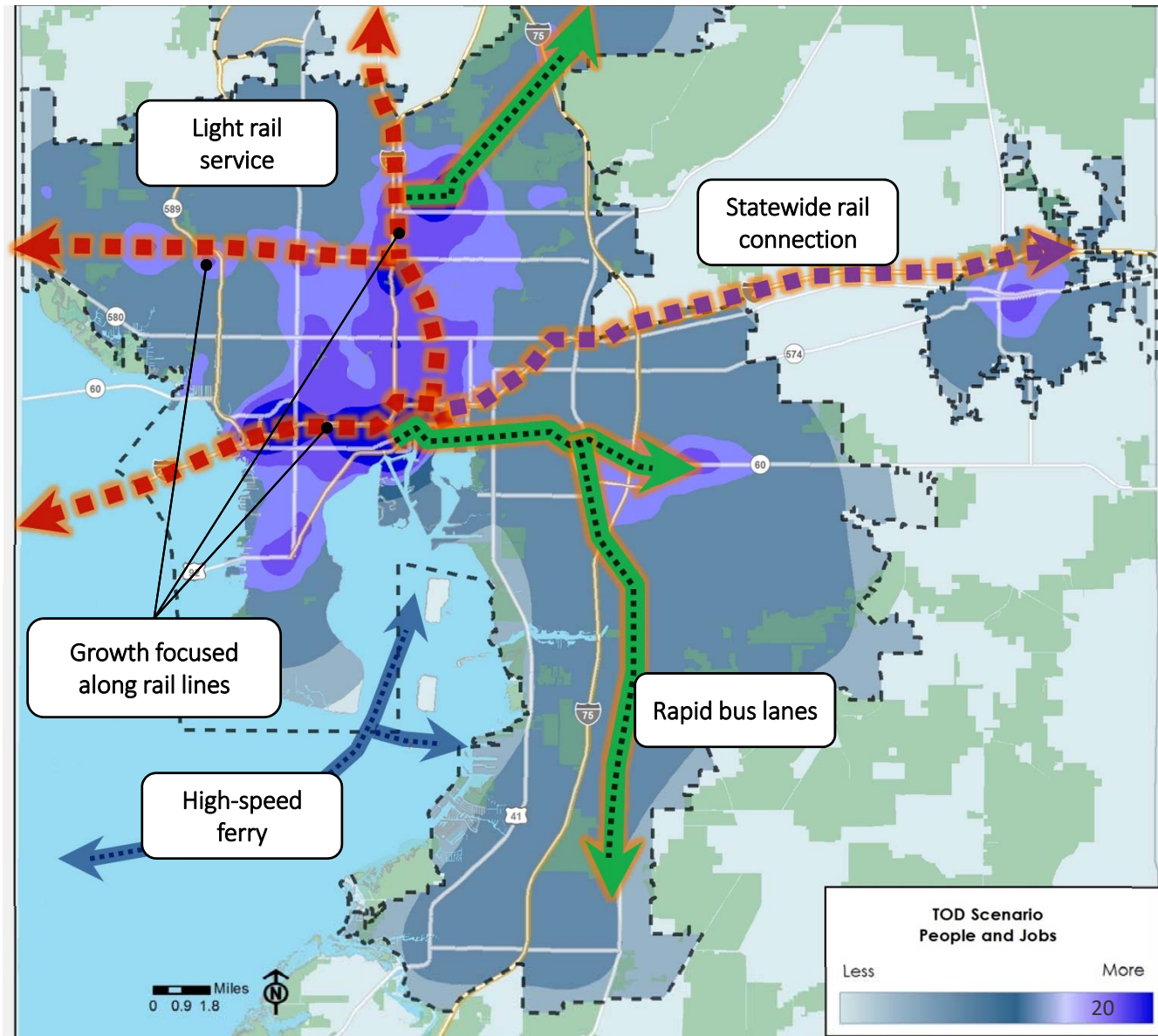
**2,140** miles of new streets

**70,000** new homes built outside of the Urban Service Area



# Transit Oriented Scenario

- Significant transit investment
- Rail and bus rapid transit
- Intensification and redevelopment along transit corridors
- No expansion of the Urban Service Area or Cities



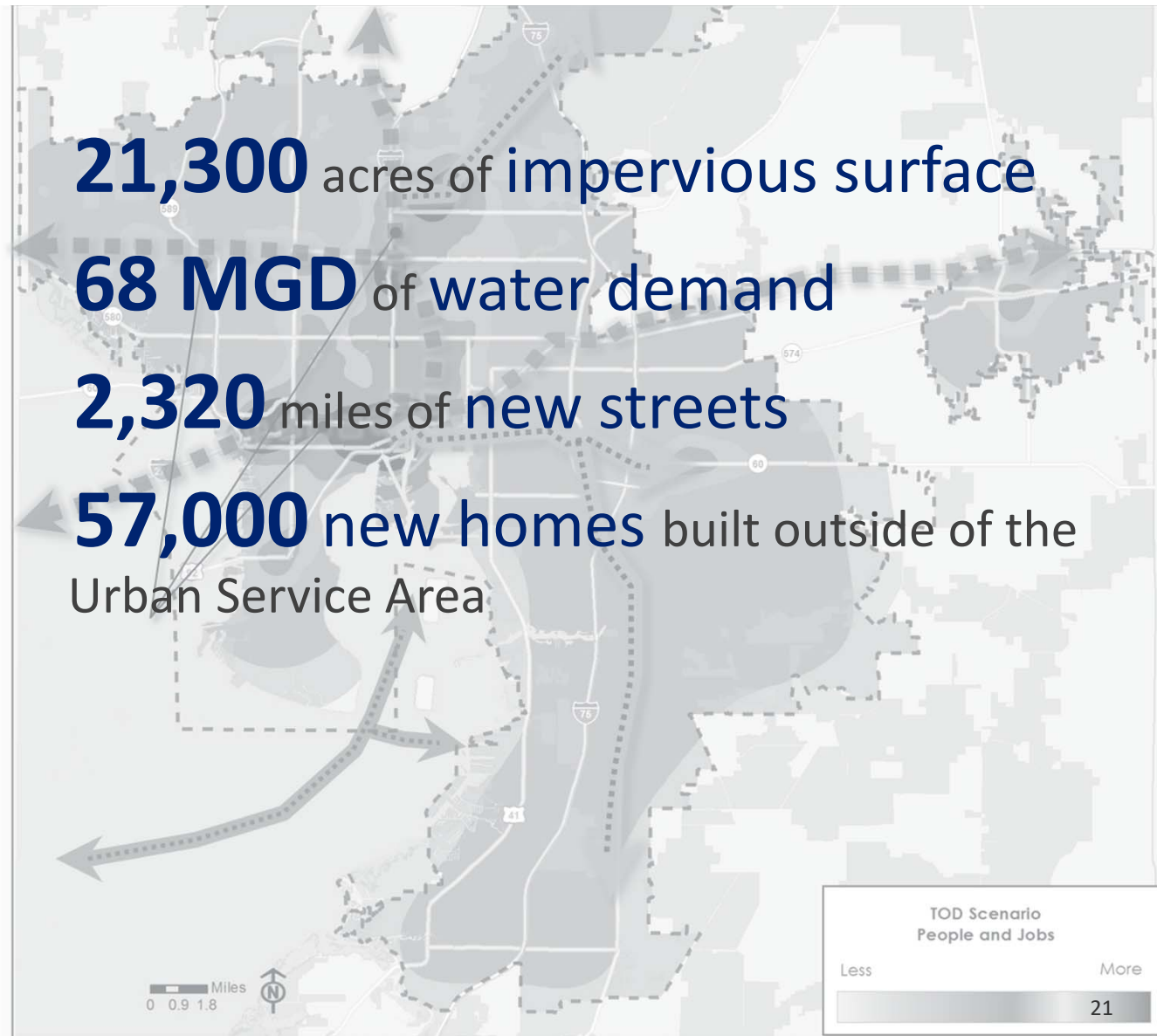
# Transit Oriented Scenario

**21,300** acres of impervious surface

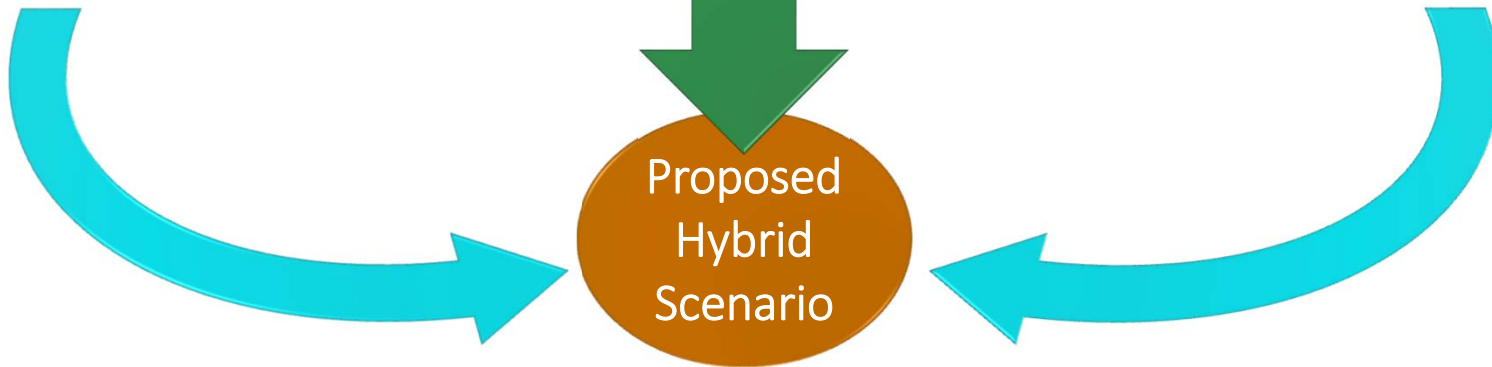
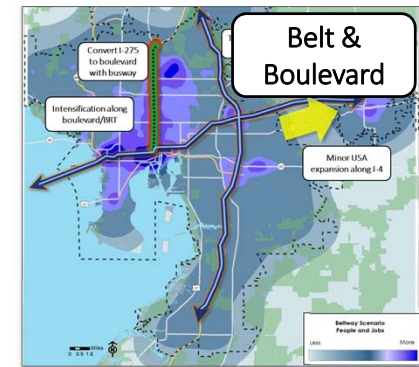
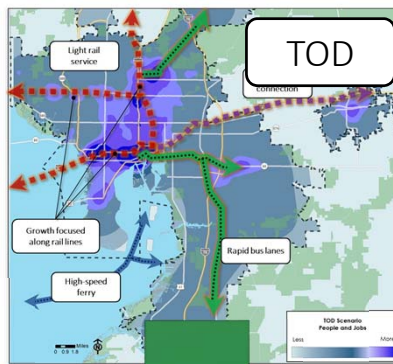
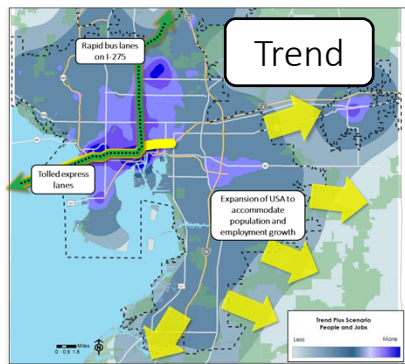
**68 MGD** of water demand

**2,320** miles of new streets

**57,000** new homes built outside of the Urban Service Area



# Proposed Hybrid Scenario



# Guidance for the 2045 Plan

## Proposed Hybrid Scenario

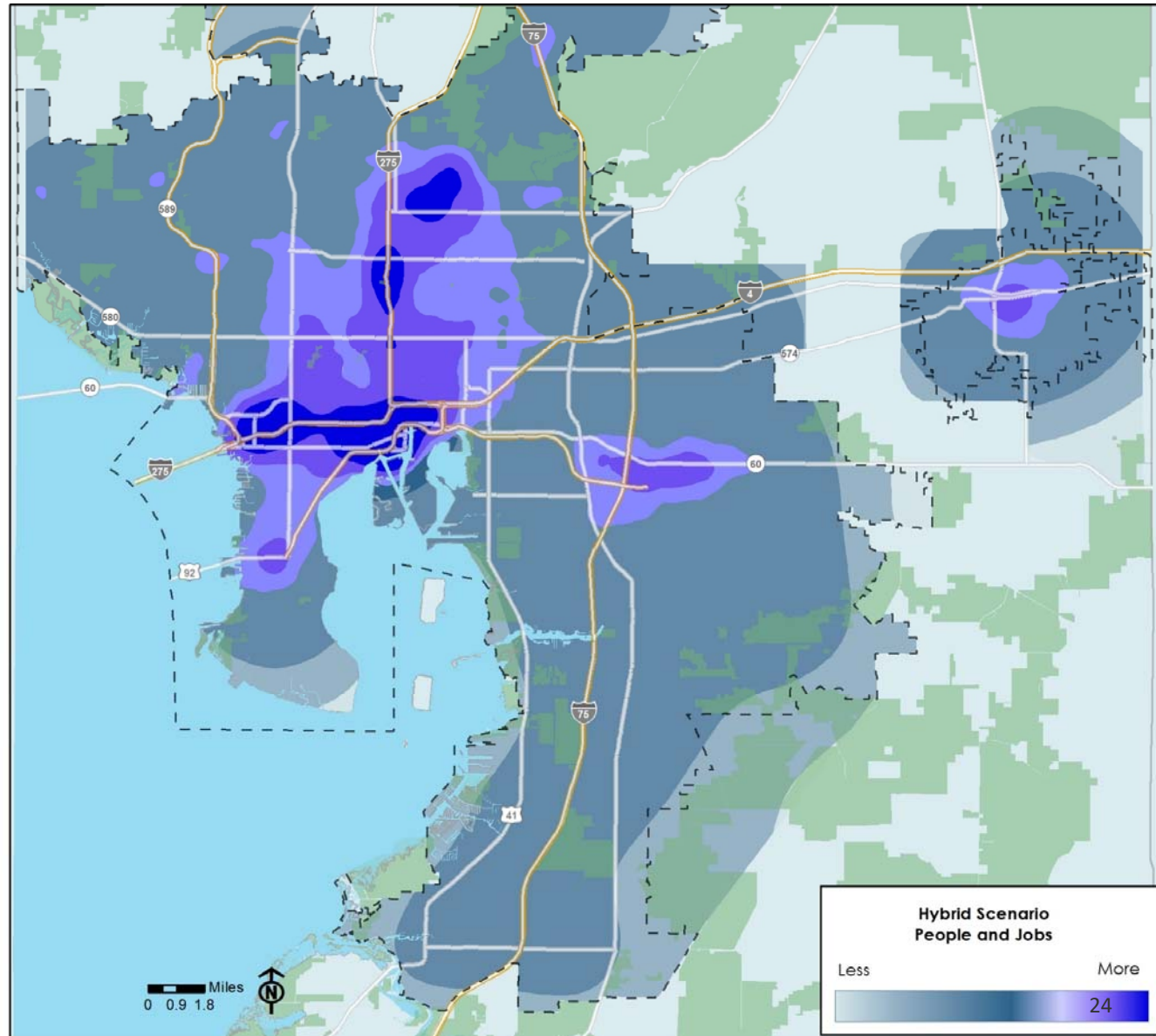


- Regional survey with over 9,500 respondents
- Encourage in local government comprehensive plans
  - Reinvest in neighborhoods
  - Strengthen downtowns, create more downtown-like places
  - Minimize outward growth
- Consider options for incorporating rail in the 2045 Plan
  - Brightline, Streetcar
  - Other rail/fixed guideway transit
  - BRT and Express bus



# Proposed Hybrid Scenario

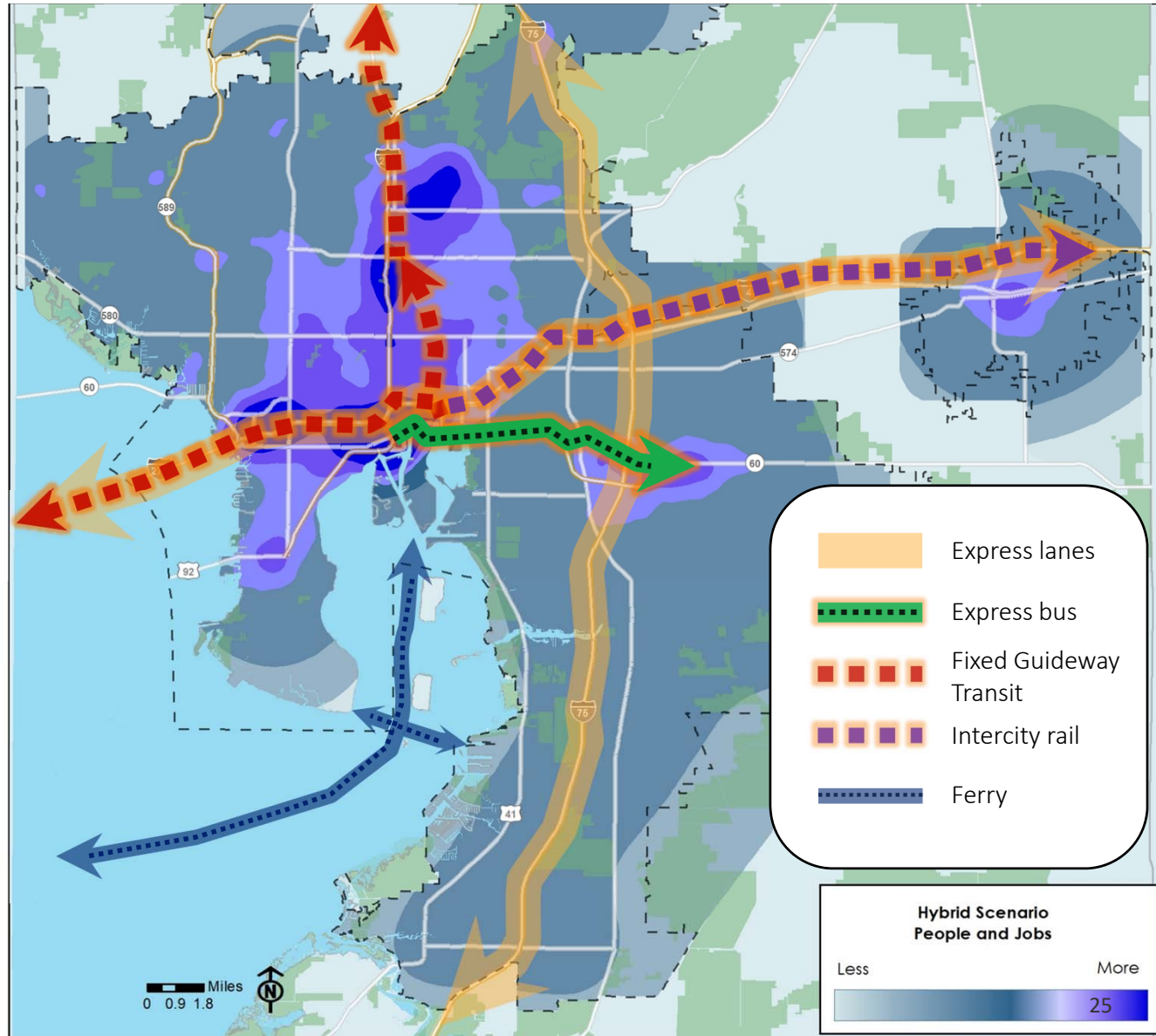
- Builds on TOD Scenario
- Includes elements of Trend and Belt & Boulevard Scenarios



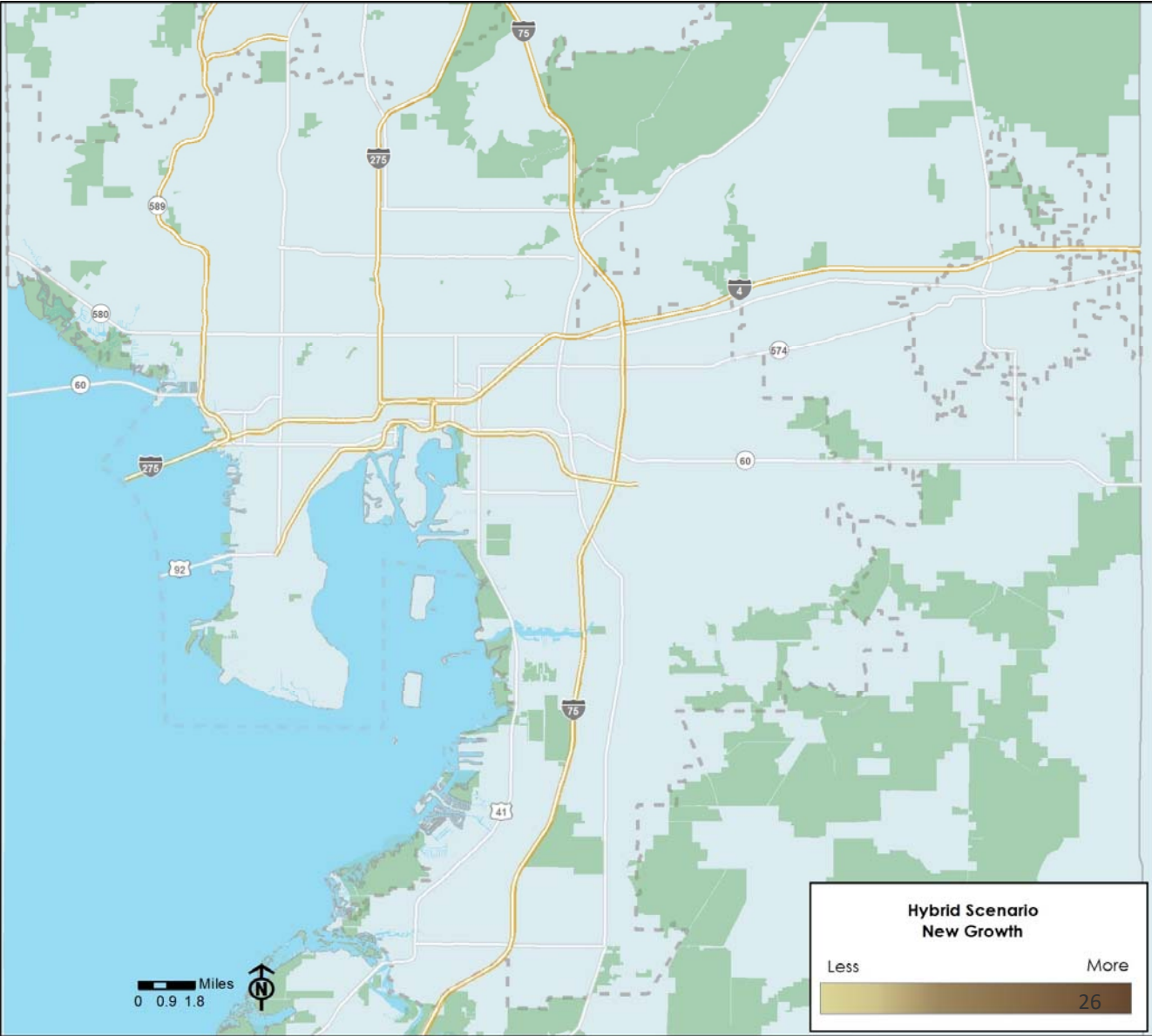


# Proposed Hybrid Scenario

- Relies on transit investment to guide growth.

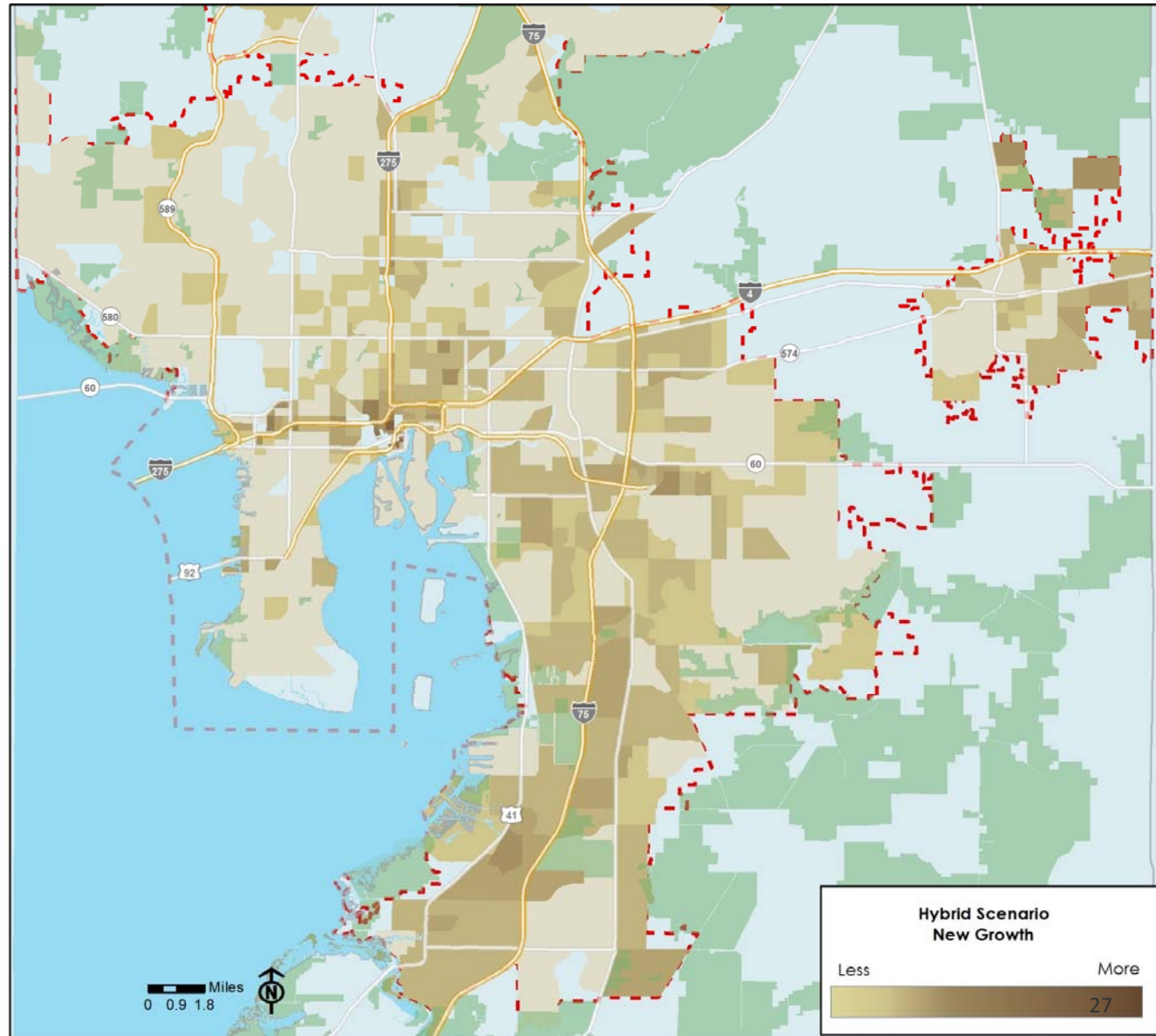


# Proposed Hybrid Growth



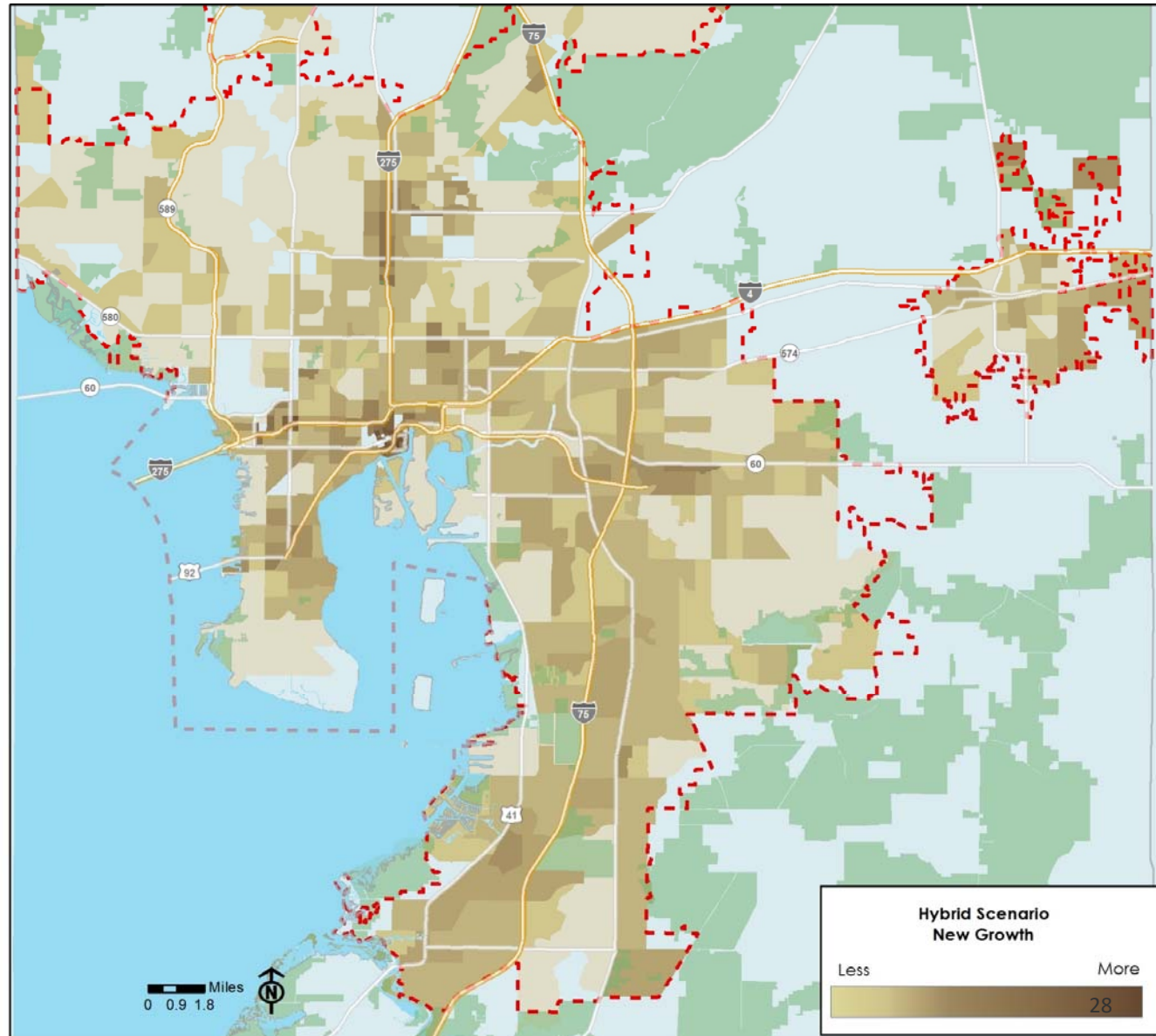
# Proposed Hybrid Growth

- Maximizing the remaining vacant land in the Urban Service Area and Cities
- Greenfield= 303,600 people

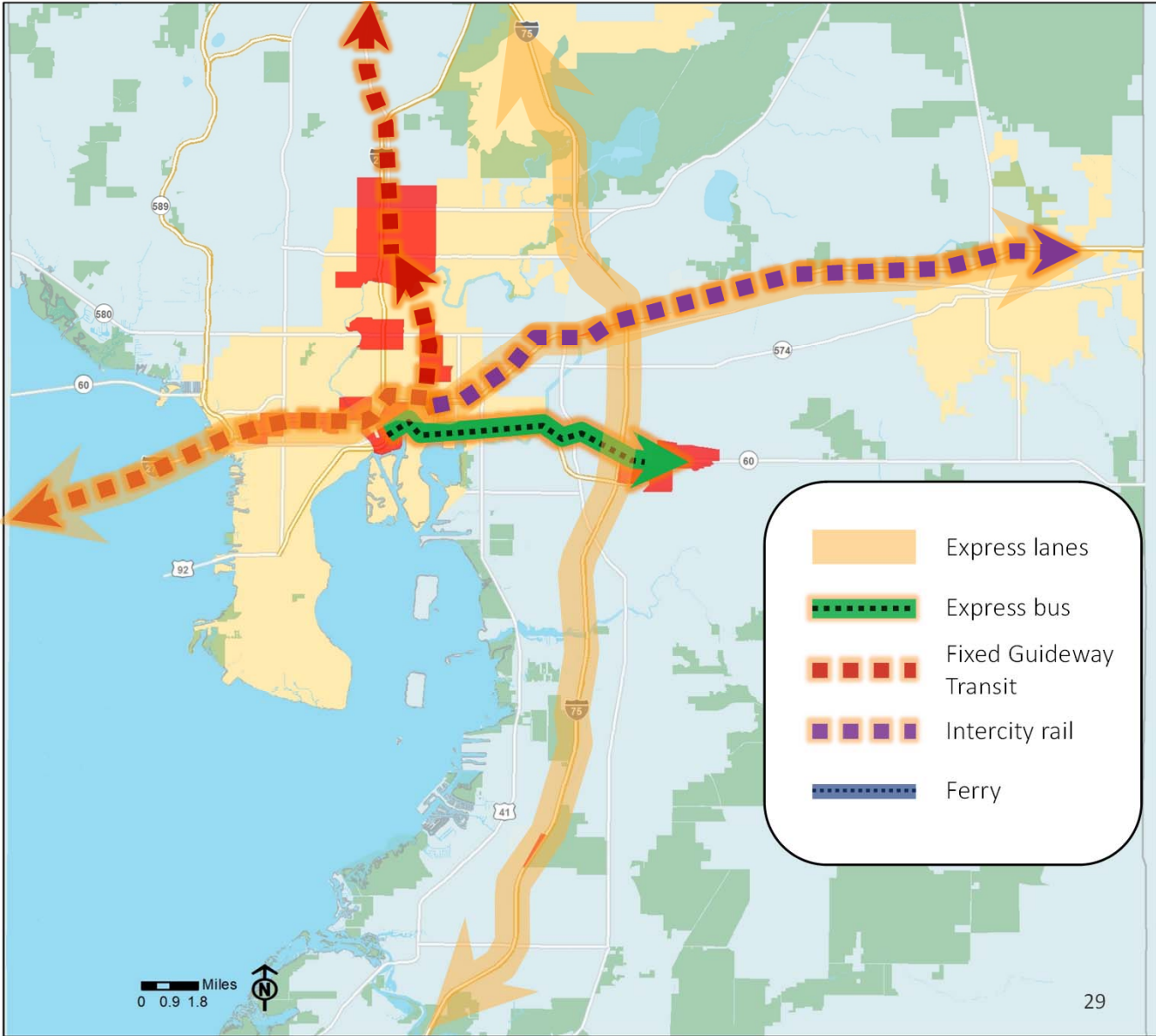


# Proposed Hybrid Growth

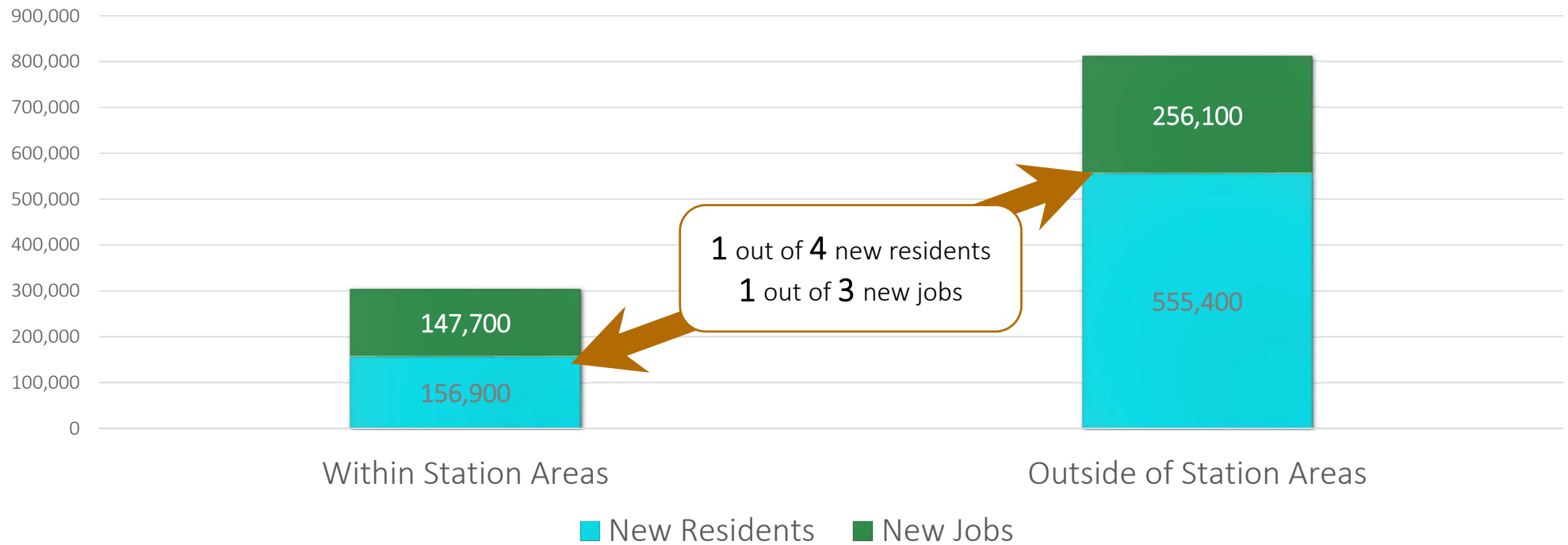
- Focus on redevelopment and transit oriented development within the Cities and Urban Service Area
- Greenfield= 303,600 people
- Redevelopment and TOD = 244,600 people



# Proposed Hybrid Station Areas

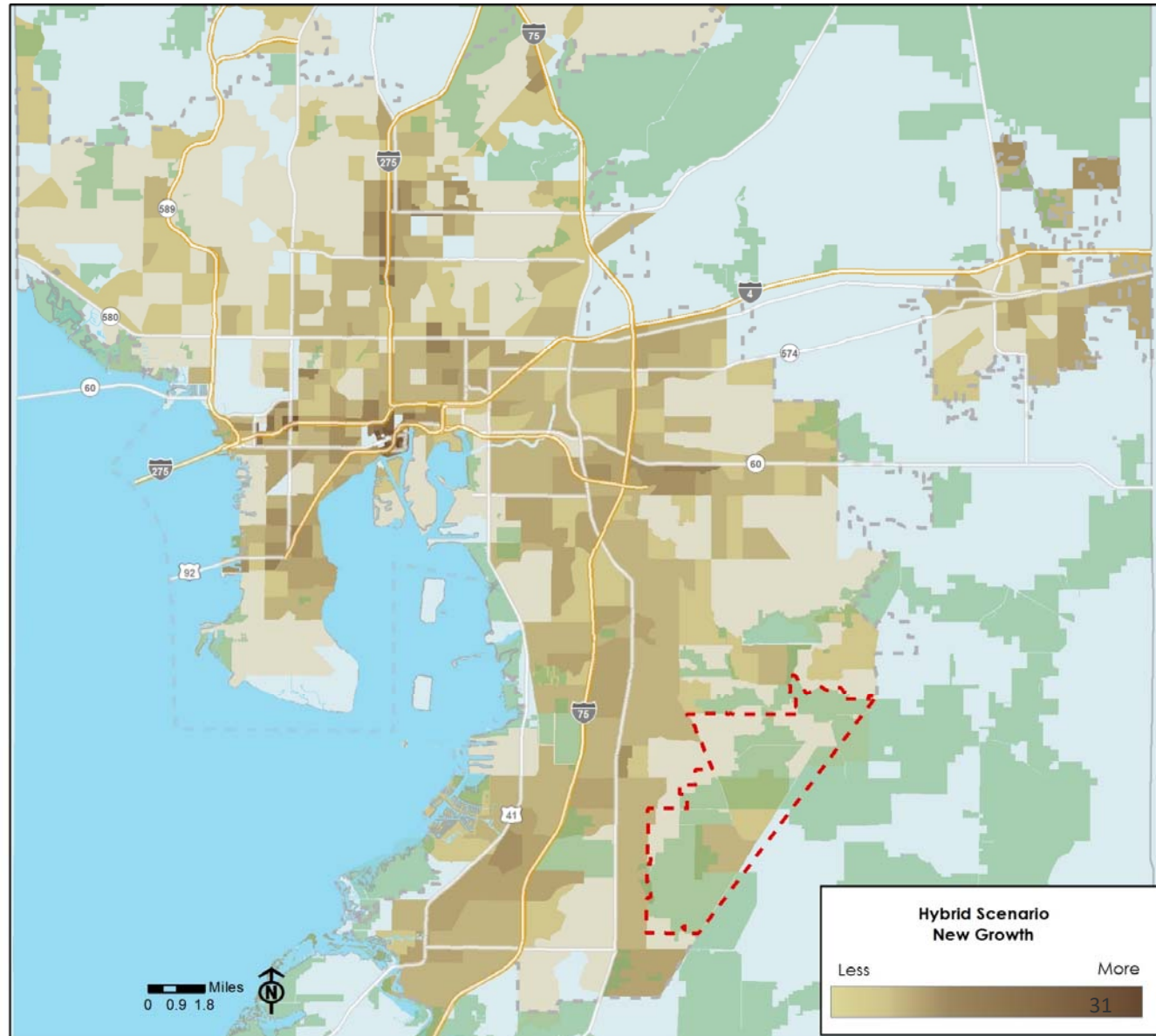


# Transit Oriented Development



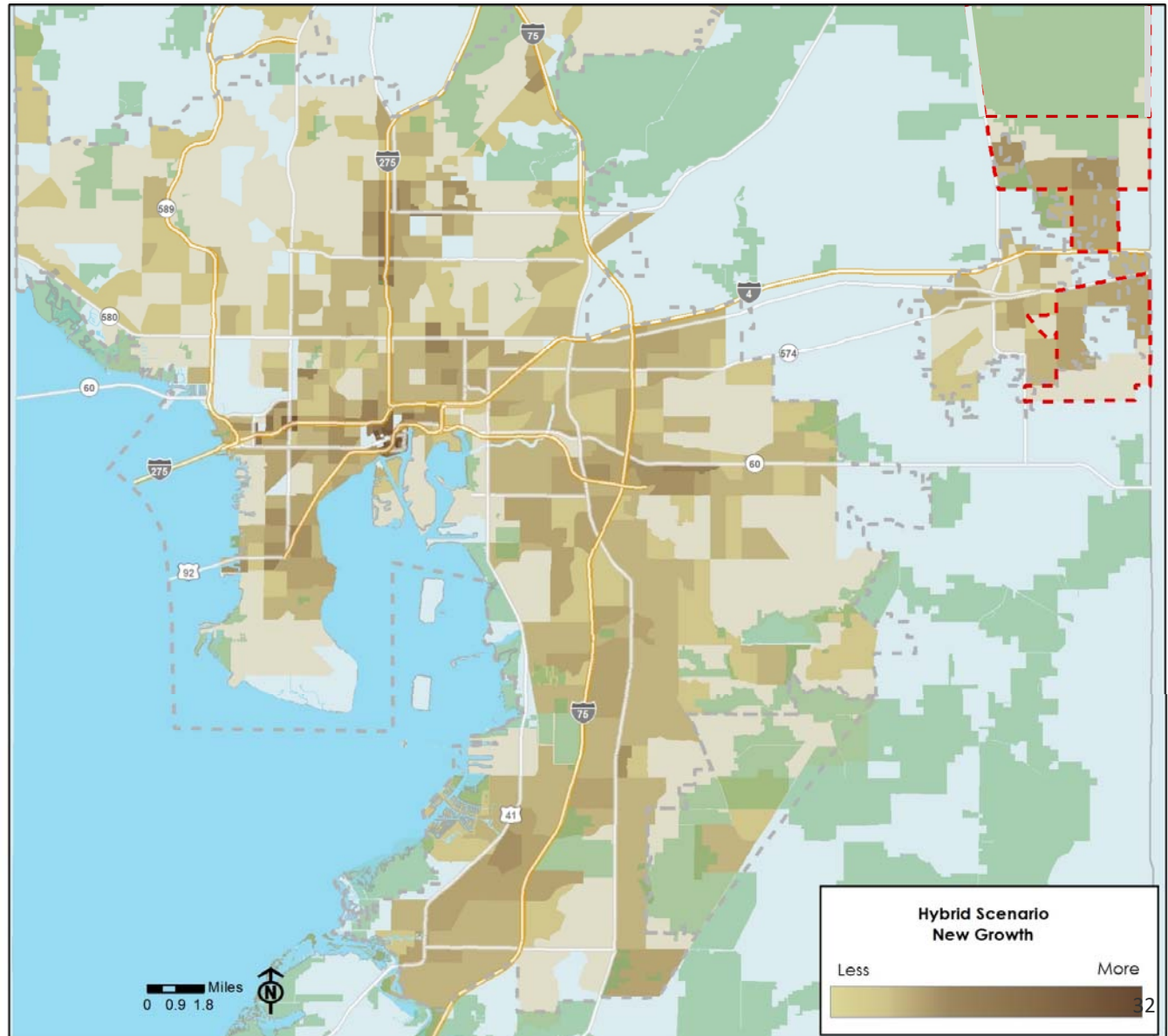
# Proposed Hybrid Growth

- The adopted Residential Planned-2 and Wimauma Village-2 Categories build out with 2 unit per acre development
- Greenfield= 303,600 people
- Redevelopment= 244,600 people
- RP-2/WV-2 Buildout = 13,800 people



# Proposed Hybrid Growth

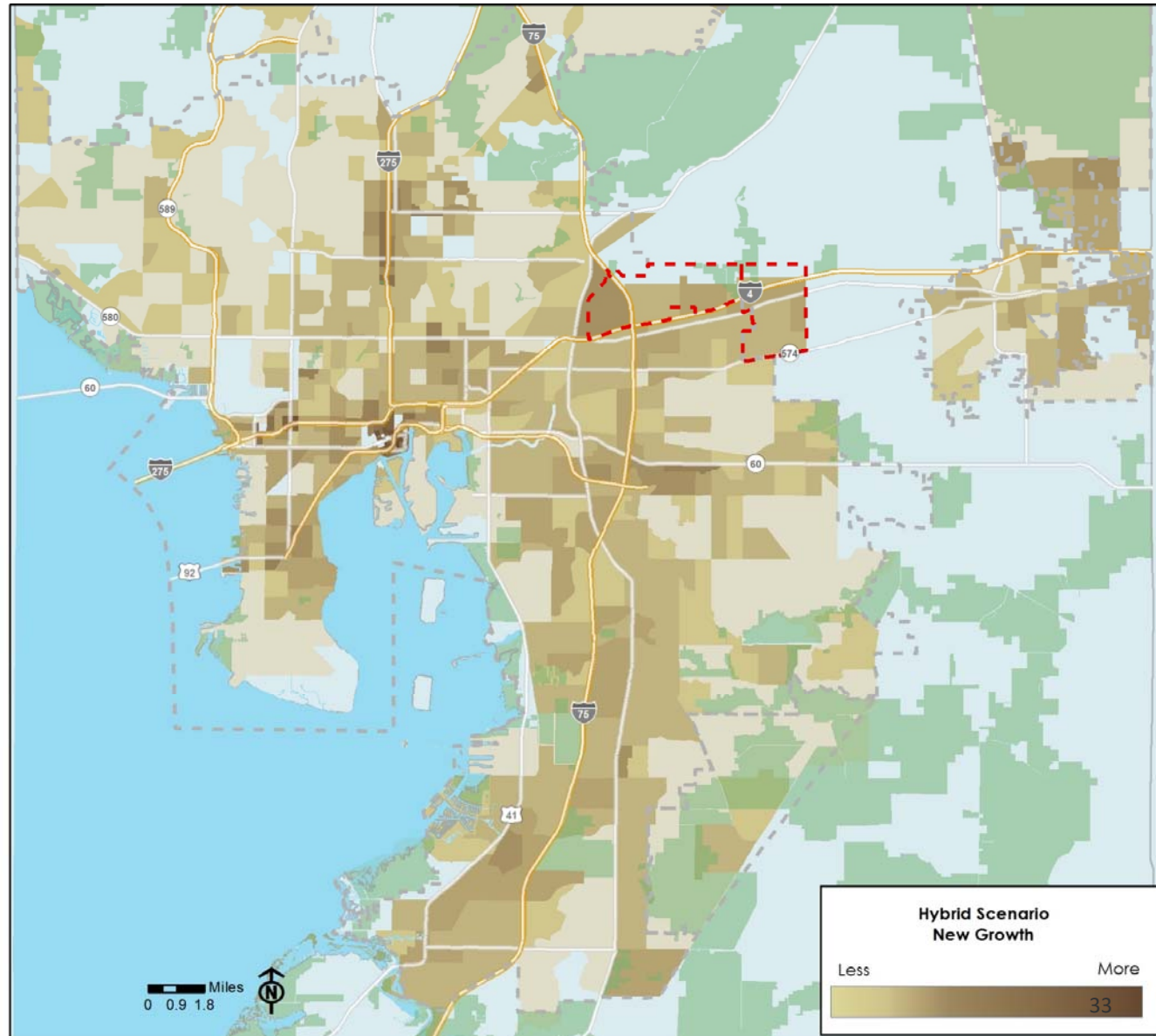
- Consider strategic expansion areas
- Greenfield= 303,600 people
- Redevelopment= 244,600 people
- RP-2/WV-2 Buildout = 13,800 people
- Expansion Area:
  - Plant City = 31,500 people





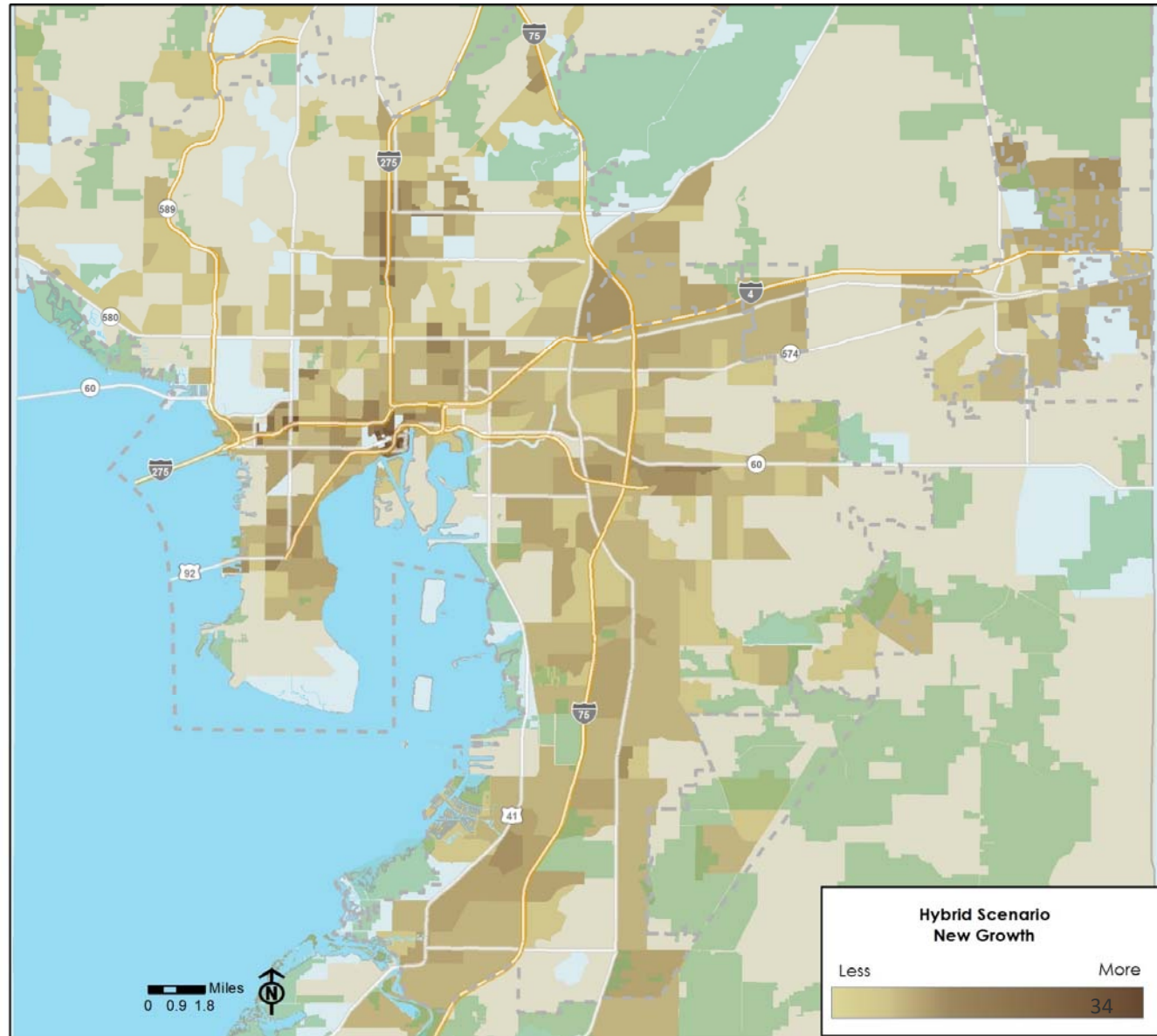
# Proposed Hybrid Growth

- Consider strategic expansion areas
- Greenfield= 303,600 people
- Redevelopment= 244,600 people
- RP-2/WV-2 Buildout = 13,800 people
- Expansion Area:
  - Plant City = 31,500 people
  - I-4= 34,700 people

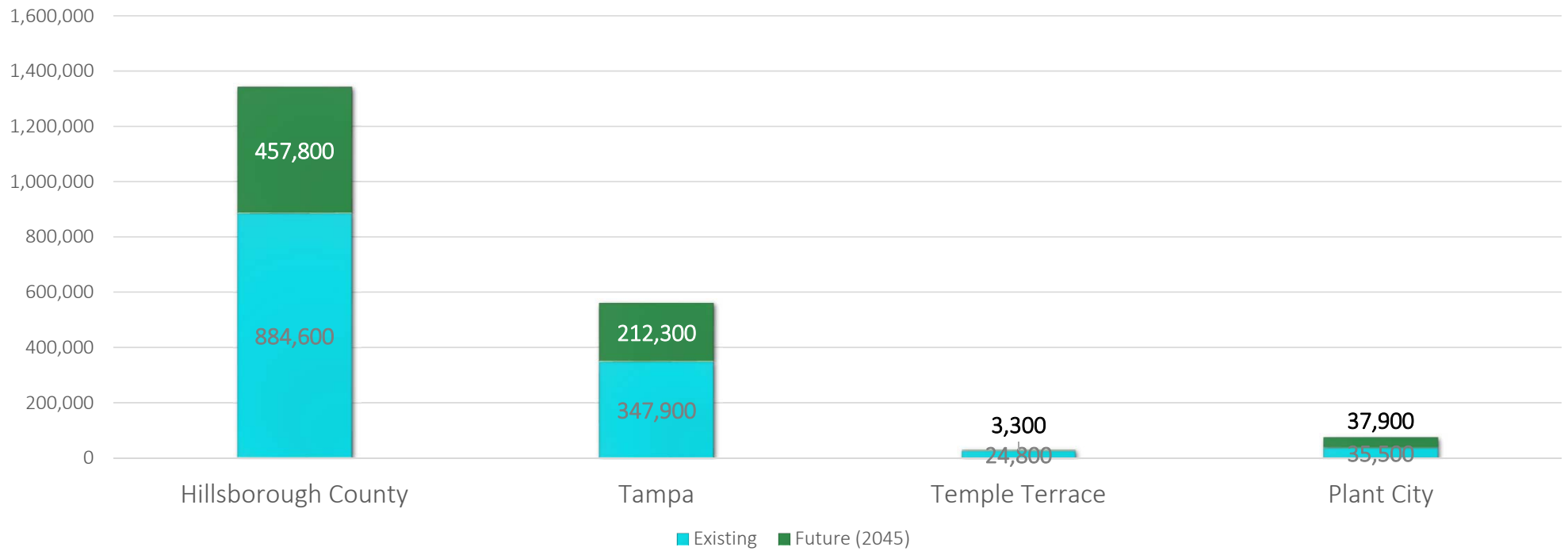


# Proposed Hybrid Growth

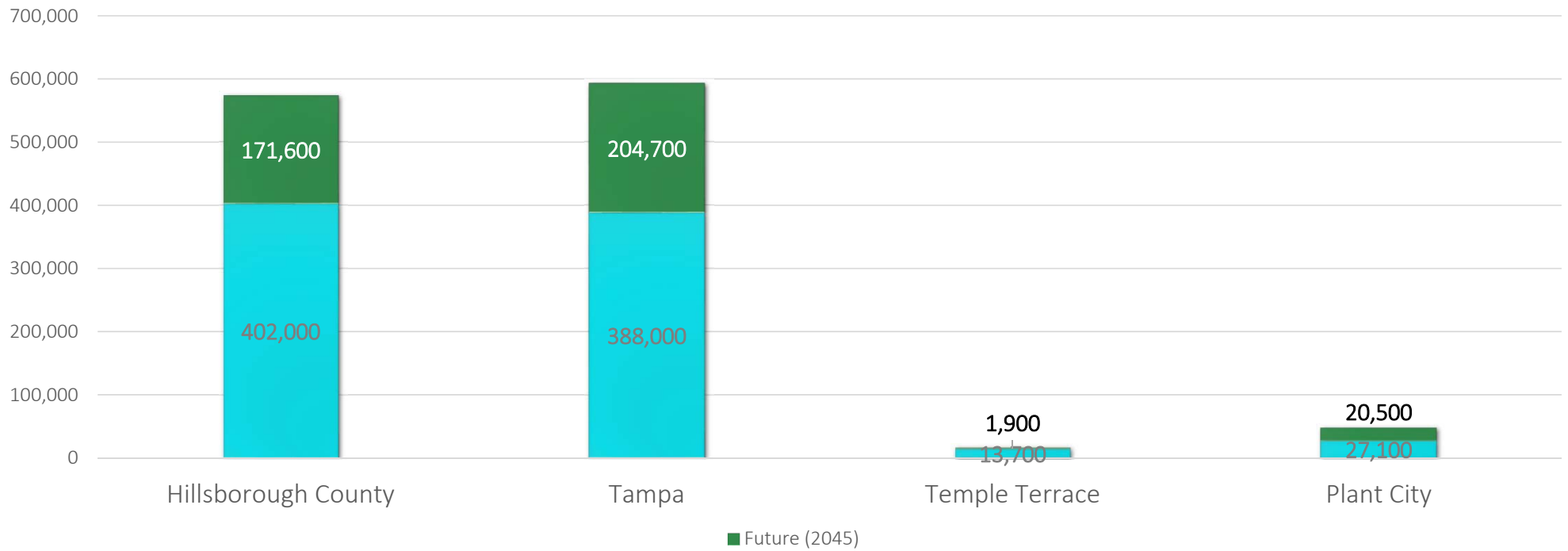
- Growth in Rural area at allowed Rural densities
- Greenfield= 303,600 people
- Redevelopment= 244,600 people
- RP-2/WV-2 Buildout = 13,800 people
- Expansion Area:
  - Plant City = 31,500 people
  - I-4= 34,700 people
- Rural area growth = 96,400 people



# Population Growth by Jurisdiction



# Employment Growth by Jurisdiction





# Next Steps

- Are these choices leading to the desired outcomes?
  - Different policy directions = different assumptions and outcomes
- Opportunity to shape the future through plan policy and investment decisions
  - Update of Comprehensive Plan and Long Range Transportation Plan
  - School and Facilities Planning
- Utilize this tool every five years to see how things are changing