

# Wimauma Community Character Profile

Hillsborough County, FL



Prepared for:  
**Hillsborough County City—County Planning Commission**  
Tampa, FL

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## **General & Limiting Conditions**

Every reasonable effort has been made to ensure that the data contained in this study reflect the most accurate and timely information possible. These data are believed to be reliable at the time the study was conducted. This study is based on estimates, assumptions, and other information developed by WTL +Associates (referred hereinafter as “WTL+a”) from its independent research effort, general knowledge of the market and the industry, and consultations with the client and its representatives. No responsibility is assumed for inaccuracies in reporting by the client, its agent and/or representatives, or any other data source used in preparing or presenting this study.

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# 1 Executive Summary

## Introduction

WTL+a, a national real estate and economic development consulting firm based in Washington, DC, with significant project experience throughout Florida, was retained in December 2019 by the Hillsborough County City—County Planning Commission (“The Planning Commission”) to prepare two studies:

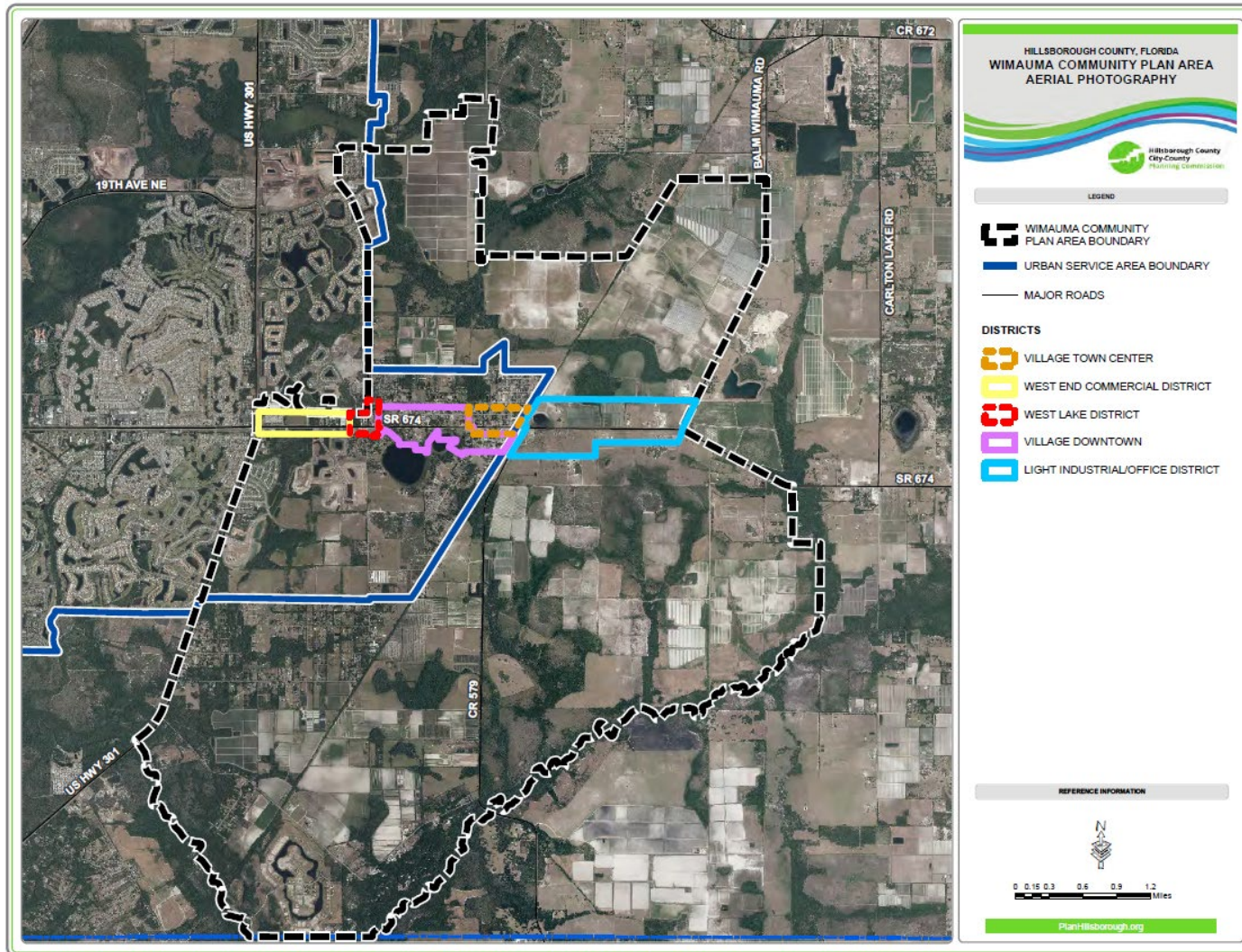
- A **Community Character Profile** of Wimauma, and
- A **Future Land Use Market Study** on two designated zoning districts—Wimauma Village Residential-2 (WVR-2) and Residential Planned-2 (RP-2).

This document comprises the Wimauma Community Character Profile. As illustrated in Figure 1, the study focuses revitalization opportunities within five identified sub-areas located along State Route 674, a primary commercial arterial linking Wimauma Village with nearby major highways, including U.S. Route 301 and I-75. These five districts include:

- Light Industrial/Office District
- Town Center District
- Downtown District
- West Lake District
- West End District

According to County data, the Wimauma Community Plan Area contains approximately 2,978 parcels over 16,311 acres of land. The two largest land uses, Agriculture and Public/Institutional, account for 6,433 acres (39.4%) and 5,761 acres (34.8%), respectively. Other existing land uses include: Residential (2,226 acres, 13.6%), Commercial (77 acres, 0.5%) and Vacant (1,732 acres, 10.6% of the total).

Figure 1: Wimauma Community Planning Area



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## Impacts of the 2020 Pandemic

This report presents the findings of the real estate market and development potentials for housing, workplace (commercial office and industrial), and supporting uses such as retail. It should be noted that **market conditions presented are based on data and conditions prior to COVID-19 impacts**. While the timing for future development may be more extended due to the pandemic, there are potentials for selected, well considered new growth and investment. Experience in other Florida markets has demonstrated that the best way to fully optimize economic benefits in Wimauma Village will result from a carefully structured and implemented plan that appropriately integrates different land uses and phases to provide development flexibility.

The most important difference between year-end 2019 (the data-year used for this analysis) and current conditions in May 2020 is the impact of the global Coronavirus pandemic. COVID-19 has already had a significant impact on commercial real estate, although these impacts vary considerably from location to location. It has affected consumer spending, real estate sales, job prospects and recreation options in ways that have profoundly modified pre-COVID conditions. **The office market, especially for technology and other computer-based industries, has responded most rapidly, and *not* in ways that are likely to encourage new office development.** At the broadest levels across the country, early reactions to self-isolation and working-at-home have resulted in some companies advising employees to work at home for the remainder of 2020, while Twitter has announced that its employees can work at home *forever*.

The travel, hospitality and retail industries have been particularly hard-hit, with airline passenger volumes reportedly down by upwards of 90% to 95%, major layoffs in the hotel and food & beverage industries, and the May 2020 announcement of a bankruptcy filing by the Hertz Rental Car company. The travel and leisure market based on tourism have been seriously impacted and will likely take several years to stabilize, much less fully recover. **The National Retail Federation speculated in May 2020 that as many as 40% of small retailers *may never re-open*.**

In its bi-annual bankruptcy update of the retail industry, BDO counts 18 retailers that headed to bankruptcy court in the first half of the year and another 11 in July through mid-August. In fact, the industry's bankruptcy record so far put it on pace with 2010, following the Great Recession, when there were 48 bankruptcy filings by retailers. The COVID-19 pandemic has essentially

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interfered with what is normally a cyclical pattern for retailers and set up the industry for yet more bankruptcies in 2020's second half.

According to BDO researchers, 2020 is on track to set the record for the highest number of retail bankruptcies and store closings in a single year. By BDO's measure, bankrupt retailers alone have announced nearly 6,000 store closings this year, more from January through mid-August than the record 9,500 stores that closed throughout 2019, and most of them in malls. More than 15 retailers (including Macy's, Bed Bath & Beyond and Gap) outside of bankruptcy court have announced a total of 4,200 closures.

National unemployment levels are at their highest since the Great Depression of the 1930s. In April 2020, the official U.S. unemployment rate was 14.7%, while Florida's rate was 12.9%; by August (the latest month in which unemployment levels were reported), the *official* U.S. unemployment rate was 8.4%, while Florida's rate was 11.3% (down from 14.5% in May 2020). For a visitor destination like Florida, where the \$111.7 billion annual tourism industry is the state's largest industry, the impact is already great, and could become a profound issue if the virus continues without a vaccine. Like many states, government policies are seeking to balance social responsibility and safety with the need to re-open businesses and encourage visitors to return. The re-opening of beaches and public spaces across the state has been both a relief to millions of Florida residents, but could also result in a virus rebound that could require retrenchment, or (at minimum) more carefully regulated public behaviors.

Taken in total, **these impacts will cause a major slowdown in economic activity across Florida (especially in hospitality and tourism-dependent sectors), and the costs of lost consumer spending will result in near-term increases in vacancy rates for retail and office uses, a massive slowdown in tourism and visitor spending**, and a slow recovery period, due in large part to the number of unknowns about a global pandemic. Until a reliable vaccine is developed and produced in sufficient volumes to stabilize the rate of transfer, recreating consumer confidence to travel, to spend time in other places and to have the money to stimulate local economies will be set back for many months, if not years.

The short-term economic prospects should be cautious and slow. However, there are mitigating factors that could change the mid-to longer-term outlook:

- **Slowing of Unsupportable Speculative Real Estate Development**—an overheated real estate market in Florida has encouraged speculative development and over-entitlements in many submarkets.
- **Time to Plan More Effectively**—a slowdown could encourage a more manageable pace of development and reduce environmental and social impacts that often result from hurried decisions.
- **Business Opportunities for Millennials**—the millennial generation is highly entrepreneurial, and will be more willing to start new retail, food & beverage and consumer service businesses once the pandemic has stopped.
- **Pent up Demand for Social Experiences**—while on-line sales have spiked, consumers are also looking forward to dining out, going out, and shopping; consumer demand for goods and services is pent-up at levels not seen since the 2007 recession.
- **Creative Regulation & Behavior Management**—if reasonable standards can be put into place and safety practices realized, Florida’s beaches, communities and visitor destinations should rebound faster than other parts of the country.

The contrasts in consumer retail offerings in Wimauma Village (mostly small locally-owned taquerias, grocery stores and automotive services) with larger-scaled, nationally-branded retailers and restaurants at the intersection of U.S. Route 301 and State Road 674 (less than two miles away) are significant. For example, Sun City Center is comprised almost entirely of major/national retail brands serving the greater area markets; anchored by large stores like Walmart and food service chains like McDonalds, Sun City Center’s retail mix is likely less exposed to the impacts of COVID-19 when compared to the “mom & pop” operations along 674 in Wimauma Village. Small, family-owned retailers and ethnic taquerias would be much more affected by illness or loss of store proprietors. **The potential for lost businesses is greater among locally-owned retailers in locations such as Wimauma Village.**

Ironically, U.S. financial markets have stabilized more quickly than consumer markets. The reduced costs of debt/capital have encouraged developers to accelerate proposed projects, allowing for 18-24 months for regulatory review, approvals, and construction so that they are ready for the rebound when it occurs. The challenge will be to select those projects carefully so

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that new development in Wimauma Village can generate the greatest economic benefits possible for its residents as well as Hillsborough County over the long term.

## **Key Findings & Recommendations**

The following sections detail the demographic and economic profile; real estate market conditions by land use; community infrastructure and environmental conditions; and recommendations of the Wimauma Community Character Profile.

## 2 Stakeholder & SWOT Summary

Strengths/Weaknesses/Opportunities and Threats (SWOT) for the Wimauma and Balm planning areas are widely varied, depending upon the individuals describing SWOT viewpoints. As summarized below, stakeholder interviews (conducted at the start of the study) represent the breadth of differing opinions about how the area should (or should not) change. For example, a number of current residents (particularly in Balm) are deeply concerned about the rapidly changing character of the Rural Service District, and disagree with the juxtaposition of suburban residential development platted for densities of up to four to five units per acre, when their expectations are to retain a more rural scale and density with five-acre parcels per dwelling unit.

Other residents believe that the allowed rezoning densities are too great, but don't want to exceed more than one unit per two acres as the maximum density. By contrast, the Hillsborough County development community, responding to consistent opportunities presented by the ongoing growth of the Tampa Bay region, want fewer controls and requirements to allow for more density. **The differing views about growth are not easily characterized within typical SWOT parameters: what may be considered a weakness by some is a strength for others.** Because there are not clear boundaries between the SWOT discussion concepts, a list of the key issues and themes identified by stakeholders and opinions expressed in the interviews is highlighted below.

### Stakeholder Interview Summary

WTL+a conducted a series of stakeholder interviews in January and February 2020 as part of a SWOT analysis of issues. The issues were framed around the WVR-2 and RP-2 zoning categories and the temporary (270-day) development moratorium imposed in the South County portion of Hillsborough County. The moratorium was described by one official as “a pause in the process to see what people want”, in reaction to widely divergent views about development, regulations and the effectiveness of the processes in place. As another stakeholder expressed it “you'll hear the bookends of opposing views and everything in between during these interviews”.

Over a three-week period, there were 22 in-person and telephone interviews lasting between one and 1.5 hours each, and almost 40 persons were interviewed. Some meetings were conducted with individuals, and others ranged from two- to three-persons up to a group meeting with 10 individuals participating. The types of interviewees and their interests were wide-ranging, and included residents of the Wimauma and Balm communities, land and project developers, land use attorneys, agricultural land owners and producers, County officials, business owners, social service group representatives, members of homeowners associations and interest-groups such as the Balm Civic Association. As predicted, the range of viewpoints ran the spectrum from no more development to ending the moratorium so necessary development can continue apace.

The interviews revealed a series of themes and shared concerns that emerged among different stakeholders and stakeholder groups; these are summarized below. As always, the identities of those whose comments are included are unattributed, in order to allow confidentiality and candor in the interviews.

WTL+a notes that, while some statements below are direct quotes, many comments are aggregated combinations from statements by more than one stakeholder.

## **Confusion: Interpretation of Comprehensive Plan & Regulatory Goals**

**Many stakeholders expressed confusion about how development densities are allowed within areas previously zoned as ‘Rural’**, areas with five-acre residential zoning and areas which allow up to two residential units per acre. Several commented that “land-use attorneys and developers figured out a loophole” in the density caps, by netting out wetlands or other unbuildable areas from their gross acreage, combining the allowed density totals into the net developable portions of the project sites.

This interpretation resulted in densities of four (or in some cases, more) dwelling units per acre. Such densities are considered unacceptable by many in an area presumed to be zoned ‘Rural’. This results in subdivisions, with 40-foot lots arrayed along residential-scaled streets, located adjacent to farms and large-lot properties.

One stakeholder noted that “there are over 6,000 new homes” within the Balm/Wimauma area, far beyond any density ever anticipated when properties were purchased years before. Other comments included:

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- “These new housing developments will be the shantytowns of the future; they aren’t built well and won’t hold up over time”.
- “The houses are only ten feet apart. They’re built so close together, you can almost step from roof-to-roof”.
- “These homeowners don’t understand that they are in the country”.
- “Feral pigs are a big problem in some areas in South County. They come and eat the flowers in the subdivision yards and go back into the woods”.
- “The subdivisions are interrupting wildlife habitat. The animals don’t have any place to live now, and numbers are declining”.

### **Confusion: Jobs Requirement Link to Zoning & Density Approvals**

Opinions varied considerably **about the requirement to provide jobs/employment facilities as well as new residential uses**. Developers claimed that “jobs were never part of the deal until recently”, and “we don’t have any idea where this came from or why it’s required now”.

Alternatively, **Wimauma Village residents and advocates expressed the need for jobs** “for their kids.” If there were places to work (at all skill levels), “they wouldn’t have to move away to find work”. Others blended the need for jobs with the need for more businesses to serve the area’s rural population. They said they need more grocery stores and other retail so they will have more places to go and more jobs to provide for the underserved population.

### **Disconnect between Growth & Wimauma’s Unique Characteristics**

Wimauma’s unique characteristics are a concern to many, including how these characteristics can ‘fit’ with all of the new growth. Comments included:

- “The community was originally poor white and black, and is now largely poor Hispanic residents”.
- It was estimated that about 20% of the Wimauma Village population is seasonal workers who are only here part of the year—they move with the harvests. The transient worker population includes both single men and families.
- Some of these temporary/seasonal workers are illegal immigrants, and are therefore very concerned about ICE enforcement. Because of their status, this population is often unable

to receive healthcare, and have no public transportation available to them to get around. “South County needs more public transportation” options. This is considered critical by some stakeholders.

- “The community needs economic opportunity”; “about half of the residents only have completed a high school education and they need new skills to make a living”. According to one stakeholder, only about 4% of the Wimauma Village population has completed an undergraduate level of college education.
- Wimauma Village residents like the traditional grid street plan, but there was never a downtown area; “we need a town center” was a comment made by several stakeholders, both to support retail and consumer services needs and to provide a sense of identity for the community. Recent growth has weakened that sense of identity for many long-term Wimauma Village residents.
- Several stakeholders commented on the Church of God, which owns large areas of land in central Wimauma Village, including the campgrounds, a cemetery (on land that “should have been used for economic development”, according to one local stakeholder), the “only swimming pool in town”, and “it’s not open to the general public”. The winter campers “don’t spend anything locally”; and “we need to get them more engaged with the Wimauma community”. How and where the Church of God’s property ownership fits into the long-range plan for Wimauma Village is a major issue and will involve more engagement with the church to understand their priorities over time.
- “Wimauma needs much more affordable housing”; this was noted by several stakeholders as a major issue. Most residents are renters, and the properties are experiencing “demolition by neglect”.

## **Lack of Infrastructure to Support New Residential Densities & Population**

Hillsborough County was criticized about the amount of new growth in the southern part of the County without sufficient infrastructure to support it/address impacts. Specifically, comments included:

- “Why weren’t the roads expanded to handle all this new traffic at the same time all the developments were approved?”

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- “My commute into Tampa has gone from 25 to 30 minutes to over an hour, and it’s getting worse. Why wasn’t the new development held back until road capacity was in place?”
  - The construction trucks alone make the roads overcrowded and dangerous.
  - There aren’t enough entry points and interchanges on I-75 to handle all the new traffic; it has made drivers more aggressive in the morning, and the number of accidents holding up traffic has gone up considerably.
  - We don’t have the schools in place to handle all the new (school-age) kids.
  - These subdivisions were built without any sidewalks or enough traffic lanes for people to walk to schools or to work. The number of pedestrian deaths is higher here than anywhere else in the County.
  - The water and waste water systems aren’t sufficient to handle all the new residents and the agricultural needs. When the growers need to spray crops before a freeze to protect their plants, the water pressure drops in houses, and takes a while to get back to a reasonable levels.
  - The development plans aren’t including any parks or activities for long-time South County residents. This should have been required in the plans for new development.

## **Public Infrastructure Costs & Burden on Existing Property Owners**

Many commented on **the failure of the County to require developers to assume the costs of new water/sewer/roads to support their projects**, particularly since development impact fees were discontinued.

- “The County allowed all this new development, and now are sticking the taxpayers with infrastructure costs, and the developers aren’t paying their share”.
- “The developers got away with shifting all these costs to the public”.

In contrast, developers and land use attorneys stated:

- South County is the “only place left in Hillsborough to accommodate the 25,000 to 30,000 new residents coming to the area annually”; another developer said “where else are we going to house all these new people?”

- One developer said “the remaining sites in the Urban Services Area don’t work; they aren’t large enough to be efficient.” The larger, former agricultural parcels are better options for (new) development.
- One developer said, “If we over-restrict development in South Hillsborough County, new development will jump over the county line and go south (to Manatee County), where development is welcomed.” Tampa is the economic driver, and those people will just continue to clog our roads and not pay any taxes to us.
- Another commented that, “even without the former Impact Fees, there are lots of costs from the County that affect residential pricing and affordability”. One developer cited the \$4,000 connection fee to utilities charged by the County: “Where is all that going?”
- Two developers did not think it necessary to expand the boundaries of the Urban Services Area, but to continue to provide exceptions and overlays, though the RP-2 requirements were not considered workable in the marketplace. While employment/services commercial development requirements don’t trigger developer obligations until “70 or 75% of the new housing is in place”, it appears that a number of residential projects have not created these uses because there are “no tenants” or the market is too weak to carry individual retail projects because the retail world has changed. “There is no market for a small pad site for food or retail, and not enough rooftops to support a larger retail development project.”
- The perception is that the County’s development requirements are out of balance with South County’s overall context, whether pro-growth or anti-growth.

## ELAPP & Open Space Issues

The Environmental Lands Acquisition and Protection Program (ELAPP) began in 1987 as a conservation mechanism to acquire and preserve environmentally endangered and significant land statewide, and to support wildlife habitat and corridors in the face of ongoing development pressures. While many stakeholders view ELAPP as a critical program to keep open space (and several stakeholders had sold property to ELAPP to preserve watersheds and environmentally sensitive areas), others commented that there are sometimes less positive aspects to the program. Comments included:

- “ELAPP has over 24,000 acres under its control here, but it is not always coordinated with other planning efforts”. (This stakeholder may have been referring to ELAPP land in South

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County; the program has over 63,000 acres under management across all of Hillsborough County).

- The ELAPP lands are ‘left unmanaged’ in several ways. They have become shelters for the growing number of feral pigs that decimate farmland and retreat into the woods. ELAPP doesn’t allow hunting, so there is no way to control feral pigs. This hurts both agricultural production as well as the investments in landscaping in new subdivisions.
- “ELAPP has bailed out a number of former Mosaic properties, paid for with public donations and funding” (the original \$21 million allocation for ELAPP funding was spent in four years; Hillsborough County voters approved increasing bond funding available for ELAPP to \$200 million, so public bond debt comprises a large part of its acquisition funding).
- ELAPP partners with the Southwest Florida Water Management District to identify properties that are environmentally sensitive or located in threatened watershed areas. However, they have sometimes identified and publicized these properties without reaching out to property owners first. This is a problem and creates resentment among some property owners, even when they are trying “to do the right thing”. There needs to be a more effective process than just holding public meetings without working with surrounding property owners first.
- Some stakeholders consider ELAPP land to be ‘not open to the public’: “no trails, no recreational activities allowed, no way for the public to use the land”; “we need parks”; “why can’t some of the ELAPP land be used for recreation?”
- “ELAPP lands get designated and purchased, then they ask for a 500 foot setback for any development on adjacent properties”. This is an after-the-fact “reduction in land values, but without any regulatory basis supporting it”.

## Transportation & Traffic

Almost without exception, stakeholders commented that there is a serious problem with traffic volumes along the I-75 corridor and its feeder roads, including State Route 672/Big Bend Road, 674 and others.

- One stakeholder said “the state (FDOT) controls the Interstate, and won’t add more interchanges in areas considered to be ‘rural’; this needs to be “changed”.

- We need a more comprehensive transportation plan, including a network of bus or other transportation options. One developer called for creation and funding of a countywide light rail system to reduce increasing road congestion.
- At the time of these stakeholder interviews, the Florida State Supreme Court was considering the legality of the proposed 1% sales tax for transportation improvements, which had previously been approved by Hillsborough County voters. Opposition in the Florida Legislature has kept the sales tax in limbo since court consideration that specific roads could not be funded with this type of tax, even if the tax is considered legal. The issue of availability of the transit tax solution is still undetermined.
- “Transportation is a huge issue for Hillsborough County”; “the County is limited by the limited existing road capacity versus the increasing number of commuters, by limits of the public bus system in a more rural area”. Notably, one developer offered “to buy four buses for them if they’ll run by my projects”. Also, there are limited funding sources for system-scaled improvements.

## Agricultural Land & Development

Several stakeholders are involved in agricultural production and land ownership in South County. They commented on the continuing growth of non-agricultural uses, the challenges to the agricultural industry caused by increasing land values and speculation, and complications resulting from outside influences beyond their control, but affecting their long-range planning. Stakeholder comments included the following:

- “This soil is best suited for cultivation of certain crops like tomatoes and strawberries, but not all crops will grow here”.
- “My tax assessment was changed from agricultural to residential rates when I rotated crops from vegetables to turf without contacting me”. One owner had to go through a major dispute to resolve a mistake in how the land was viewed by tax assessors.
- Agricultural production seems to be approaching a crossroads; many farming families don’t have successive generations who want to stay in it, and developers are constantly approaching farm owners with offers to sell. One agricultural stakeholder says he gets a couple of calls every week.

- Land values are perceived to have gone beyond what traditional agriculture will support economically, especially if compared to residential land values. Farmers are pressured to sell out, even when ag-production is financially successful.
- Recent U.S. trade policy has effectively moved the large-scale tomato-growing business from Hillsborough County to Mexico, and it has undermined what was the County's major crop for many years. Stakeholders feel that U.S. trade policy seems to be trying to do the same thing to the strawberry-growing business.
- Growers and farmers are now acquiring blocks of acreage in other counties to stay in the business; land (in Hillsborough County) is becoming too costly to purchase, especially from other farmers who decide to get out of the business and sell for development.
- **The amount of Hillsborough County land in agricultural production has reportedly decreased over the last 15 years.** In 2005, there were 229,875 acres of land in Hillsborough County used for agriculture, out of a total land area of 840,000 acres (representing 27% of total land area in the County); and
- According to County Property Appraiser records, by 2016 agricultural land had been reduced to 215,000 acres, representing a decline of 15,000 acres (or 1.8% of total land area). **This net loss of 15,000 acres of agricultural land occurred over only 11 years.**
- ELAPP land is not considered 'agricultural' land, so the reduction in production acreage is not the same thing as open space/conservation land.
- Using a somewhat different classification metric, in 2018 the Florida Department of Revenue (DOR) identified Hillsborough County land in commercial agriculture (including timber production, crops, pasture land, dairy, citrus production and plant nurseries) to include 162,585 acres across the county. We again note that this total does not include the 63,400 acres under ownership/management by ELAPP.
- Regardless of the system used to measure agricultural land, the total amount of agricultural land across Hillsborough County has been reduced in the last decade.

## Relative Economic Cost/Benefit of Agricultural Land

As an economic driver, agricultural production and land is a consideration in terms of its relative cost/benefits to Hillsborough County, particularly as it relates to views of residential

development. In 2005, Hillsborough County conducted an impact analysis to measure the relative costs/benefits of property tax revenues versus the cost of providing public services. According to the findings of the impact report, **for every \$1 generated in property tax revenues for agricultural land, the cost to provide services was \$0.25. In contrast, for every \$1 in property taxes generated by residential development, the cost to provide public services was \$1.29 (see Table 16).** Clearly the differential in these costs/benefits should be considered in future land use planning from a public cost perspective alone.

## Suggested Solutions

A number of stakeholders mentioned one or more possible solutions to address the concerns in the WVR-2 and RP-2 areas as well as the value differentials by land use category. Among the proposed solutions were the following:

- **Use land swaps to locate redevelopment into more desirable/beneficial areas.** One stakeholder suggested using this tool to “relocate” (transfer) South County residential development into parcels located within the Urban Services Area of the County.
- **Consider how to use Transfer of Development Rights (TDRs) to protect rural land from development but encourage relocated development rights to other areas.** This approach has been successfully used in Montgomery County, Maryland to conserve farmland and open space in a rapidly-growing region. TDRs have had limited success in Florida to date and, while possible, will require considerable complexity to establish and administer effectively.
- Public Land Trusts can be useful tools to manage gentrification in rapidly-growing areas with increasing land values that engender displacement of long-time residents.
- The 1% transportation tax approved by Hillsborough County voters could address transit/roadway infrastructure inadequacies. At the time of this report, the proposed tax was pending a decision in the Florida Supreme Court.
- **Entitlements for development need to be comprehensively identified and understood** as a basis for future land use planning under the Comprehensive Plan.
- Sustaining “community character” is an issue in Wimauma Village and Balm, although with differing priorities and desired outcomes. A key issue will be to clarify the understanding of

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how 'rural character' is defined, planned, platted and managed going forward in the face of continued need for more housing.

- **The relationship between the Urban Services Area and the Rural Services Area in Hillsborough County is in need of further refinement and clarification** of what is allowed in each. The role and utility of RP-2 and WVR-2 zoning is at the nexus of that relationship, and will need to be explored as part of the planning workshops/planning analyses scheduled in both Balm (RP-2) and Wimauma Village (WVR-2) in the near future.

# 3 Demographic & Economic Profile

The following evaluates those indices that drive fundamental market demand for various land uses to inform revitalization and development potentials for Wimauma Village. This section of the report focuses on population and household growth, employment trends and forecasts, household incomes and annual retail spending power, the current business mix in Wimauma and Balm, and other economic indicators based on available data that form the basis of potential market support.

This profile and analysis are based on data from various secondary public and private sources, including U.S. Census Bureau; University of Florida Bureau of Business & Economic Research; Hillsborough County; ESRI Business Analyst; Dun & Bradstreet, Inc.; and multiple other sources.

## Demographic Trends & Forecasts



WTL+a evaluated historic population patterns and growth forecasts in various geographies—including the Wimauma Community Plan area, the Balm Community Plan area, and Hillsborough County using the sources above. Key findings are summarized below, with data illustrated in the accompanying tables.



**Table 1: Regional Population Trends & Forecasts—Hillsborough County, 2000—2030**

	2000	% of County	2010	% of County	1-Apr 2019	% of County	Change: 2000-2019		Forecasts (3)			Change: 2019-2030	
							Amount	CAGR (2)	2020	2025	2030	Amount	CAGR (2)
<b>Population</b>													
<b>Hillsborough County</b>	<b>998,948</b>		<b>1,229,226</b>		<b>1,444,870</b>		<b>445,922</b>	<b>1.96%</b>	<b>1,474,300</b>	<b>1,611,300</b>	<b>1,721,600</b>	<b>276,730</b>	<b>1.61%</b>
Plant City	29,915	3.0%	34,721	2.8%	39,478	2.7%	9,563	1.5%	40,282	44,025	47,039	7,561	
Tampa	303,447	30.4%	335,709	27.3%	390,473	27.0%	87,026	1.3%	398,426	435,450	465,259	74,786	
Temple Terrace	20,918	2.1%	24,541	2.0%	26,669	1.8%	5,751	1.3%	27,212	29,741	31,777	5,108	
<b>Unincorporated</b>	<b>644,668</b>	<b>64.5%</b>	<b>834,255</b>	<b>67.9%</b>	<b>988,250</b>	<b>68.4%</b>	<b>343,582</b>	<b>2.3%</b>	<b>1,008,379</b>	<b>1,102,083</b>	<b>1,177,525</b>	<b>189,275</b>	
<b>Total:</b>	<b>998,948</b>	<b>100.0%</b>	<b>1,229,226</b>	<b>100.0%</b>	<b>1,444,870</b>	<b>100.0%</b>	<b>445,922</b>	<b>1.96%</b>	<b>1,474,300</b>	<b>1,611,300</b>	<b>1,721,600</b>	<b>276,730</b>	<b>1.61%</b>

(1) Based on the 2020-2045 Low-Medium-High Population Forecasts prepared by BEBR. The analysis uses the Medium Growth Scenario for Hillsborough County.

(2) CAGR=Compound Annual Growth Rate.

(3) Population projections for 2019-2030 for incorporated municipalities and unincorporated areas assume that each maintains its 2019 share of the County's total population.

<https://www.bibr.ufl.edu/population>

**Source: U.S. Census Bureau; University of Florida, Bureau of Business & Economic Research, Florida Population Studies Bulletin 186; ESRI Business Analyst; WTL+a, revised April 2020.**

## Hillsborough County

- As illustrated in Table 1 above, Hillsborough County’s population increased—from 998,940 residents in 2000 to more than 1.44 million residents as of the April 1, 2019 state census, reflecting significant population growth of more than 445,900 over the past 19 years. In fact, this represents a *sustained* annual growth rate of 1.96% per year during this period;
- The population of the unincorporated portions of Hillsborough County (in which Wimauma and Balm are located) is rapidly increasing. Between 2000 and 2019, the unincorporated area added almost 343,600 new residents, comprising fully 77% of all new population growth in Hillsborough during this period. The average annual growth rate in unincorporated areas—2.3% per year—exceeded the growth rate of Hillsborough County during this period;

### Since 2000, Hillsborough County Added

**445,900 New Residents**

- Based on the Moderate Growth scenario of long-term population forecasts through 2030 (prepared by the University of Florida/Bureau of Economic & Business Research/BEER), growth in **Hillsborough County is expected to slow slightly, adding 276,730 new residents**. This translates into an annual growth rate of 1.61% per year over the next 10 years, for a 2030 population of 1,721,600 residents; and
- Other demographic characteristics of Hillsborough County are highlighted in Table 2:
  - In 2019, the median age of County residents is 37.3 years
  - Over the next five years, ESRI Business Analyst (a demographic analytics database) forecasts suggest the County will add 126,200 new residents in more than 45,700 new households
  - Age cohorts with the strongest growth rates include ages 35-44 (move-up buyers), 65-74 (retirees) and those ages 75+. This will impact opportunities for new housing
  - The County’s average household income is \$82,088. Forecasts suggest incomes will increase by 2.8% per year—slightly higher than inflation—suggesting *real* growth in incomes and disposable spending

**Table 2: Demographic Characteristics—Hillsborough County, 2000—2024**

	2000	2010	2019	% Dist.	2024	% Dist.	Change: 2019-2024	
							No.	CAGR %
<b>Demographic Profile</b>								
<b>Population</b>	998,948	1,229,226	1,454,648		1,580,919		<b>126,271</b>	<b>1.68%</b>
<b>Households</b>	391,357	474,030	553,152		598,910		<b>45,758</b>	<b>1.60%</b>
<b>Avg. HH Size</b>	2.51	2.55	2.59		2.60			
<b>Median Age</b>		36.0	37.3		37.6			
<b>Race</b>								
White		876,137	993,656	68%	1,055,032	67%	61,376	1.2%
Black		205,073	249,193	17%	274,268	17%	25,075	1.9%
American Indian		4,779	5,885	0%	6,556	0%	671	2.2%
Asian, Pacific Islander		43,001	63,524	4%	78,001	5%	14,477	4.2%
Other		61,554	87,307	6%	101,874	6%	14,567	3.1%
Two or More Races		38,682	55,083	4%	65,188	4%	10,105	3.4%
<b>Total:</b>		<b>1,229,226</b>	<b>1,454,648</b>		<b>1,580,919</b>		<b>126,271</b>	
Hispanic (1)		306,635	436,063	30%	522,387	33%	86,324	3.7%
<b>Age Distribution</b>								
0-14		243,031	267,073	18%	289,079	18%	22,006	1.6%
15-24		180,020	195,652	13%	204,401	13%	8,749	0.9%
25-34		173,877	218,469	15%	239,814	15%	21,345	1.9%
35-44		174,342	189,188	13%	213,443	14%	24,255	2.4%
45-54		178,058	185,893	13%	185,648	12%	(245)	-0.03%
55-64		134,661	179,924	12%	186,191	12%	6,267	0.7%
65-74		79,772	128,855	9%	149,973	9%	21,118	3.1%
75+		65,465	89,594	6%	112,370	7%	22,776	4.6%
<b>Income Profile</b>								
<b>Households by Income</b>								
<\$15,000			11.5%		9.5%			
\$15,000 - \$24,999			9.0%		7.5%			
\$25,000 - \$34,999			9.2%		8.0%			
\$35,000 - \$49,999			13.9%		13.0%			
\$50,000 - \$74,999			18.0%		17.9%			
\$75,000 - \$99,999			12.3%		13.0%			
\$100,000 - \$149,999			13.6%		15.6%			
\$150,000 - \$199,999			6.0%		8.0%			
\$200,000+			6.5%		7.6%			
<b>Average HH Income</b>			\$ 82,088		\$ 94,132			<b>2.8%</b>
<b>Median HH Income</b>			\$ 56,744		\$ 64,710			<b>2.7%</b>
<b>Education Profile</b>								
<b>Years of Education (2017 American Community Survey/ACS)</b>								
Less than 9th Grade			4.8%					
9th-12th Grade, No Diploma			7.0%					
High School Graduate (Includes Equivalency)			27.2%					
Some College, No Degree			19.6%					
Associate Degree			9.4%					
Bachelor's Degree			20.4%					
Graduate/Professional Degree			11.6%					

(1) Persons of Hispanic origin are a subset of other race categories; therefore, totals do not add.  
<https://factfinder.census.gov/faces/nav/jsf/pages/index.xhtml>

Source: ESRI Business Analyst; American Community Survey; WTL +a, January 2020.

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## Wimauma & Balm Community Plan Areas

- As illustrated in Table 3, **Wimauma’s population doubled between 2000 and 2019**—from 4,500 to 9,000 residents—in 2,135 households. This reflects a *sustained* average annual growth rate of 3.72% per year over the past 19 years—higher than both the County as a whole as well as the unincorporated areas of the County. **More recently, growth in Wimauma has accelerated, averaging 3.91% per year over the past 10 years** (2010—2019). **WTL+a utilized these historic growth rates in our analysis of housing demand potentials.** By comparison, Hillsborough County’s growth rate averaged 1.96% per year during this period;
- Growth is expected to slow slightly over the next five years. According to ESRI Business Analyst, **Wimauma is forecast to add 1,272 new residents in 295 new households** by 2024, reflecting an average annual growth rate of 2.68% per year;
- As illustrated in Table 4, Balm’s population also doubled between 2000 and 2019—from 1,560 to 3,080 residents—in 788 households. This reflects a *sustained* average annual growth rate of 3.64% per year over the past 19 years. Growth in Balm is also forecast to moderate slightly over the next five years—with **306 new residents in 77 new households** by 2024, reflecting an average annual growth rate of 1.91% per year;
- **The median age of Wimauma residents is younger:** 27.5 years, compared to 37.3 years for County residents and 37.7 years for Balm residents;
- According to ESRI Business Analyst, **average household size in both areas is quite large:**
  - 4.21 people per household (PPH) in Wimauma
  - 3.77 people per household in Balm
  - This is significantly greater than the 2.70 people per household used in the Employment & Service Requirements of the Comprehensive Plan
- We note that Planning Commission population density data for the Wimauma planning area suggests an average household size in 2010 of 3.66 as compared to the 2010 Census of 4.15. By 2019, County data suggest that household size had declined further—to 3.44 people per household;

**Table 3: Demographic Characteristics—Wimauma Community Plan Area, 2000—2024**

	2000	2010	2019	% Dist.	2024	% Dist.	Change: 2019-2024	
							No.	CAGR %
<b>Demographic Profile</b>								
<b>Population</b>	4,497	6,373	9,003		10,275		1,272	2.68%
As % of County	0.45%	0.52%	0.62%		0.65%			
<b>Households</b>	1,190	1,533	2,135		2,430		295	2.62%
<b>Avg. HH Size</b>	4.15	4.15	4.21		4.23			
<b>Median Age</b>		25.4	27.5		28.1			
<b>Race</b>								
White		4,371	6,222	69%	7,129	69%	907	2.8%
Black		377	489	5%	531	5%	42	1.7%
American Indian		56	83	1%	96	1%	13	3.0%
Asian, Pacific Islander		70	113	1%	135	1%	22	3.6%
Other		1,358	1,891	21%	2,146	21%	255	2.6%
Two or More Races		140	205	2%	237	2%	32	2.9%
<b>Total:</b>		<b>6,372</b>	<b>9,003</b>		<b>10,274</b>		<b>1,271</b>	
Hispanic (1)		4,777	6,963	77%	8,174	80%	1,211	3.3%
<b>Age Distribution</b>								
0-14		1,944	2,607	29%	2,977	29%	370	2.7%
15-24		1,194	1,445	16%	1,620	16%	175	2.3%
25-34		1,121	1,652	18%	1,735	17%	83	1.0%
35-44		743	1,053	12%	1,305	13%	252	4.4%
45-54		611	814	9%	900	9%	86	2.0%
55-64		377	696	8%	770	7%	74	2.0%
65-74		232	448	5%	575	6%	127	5.1%
75+		150	290	3%	391	4%	101	6.2%
<b>Income Profile</b>								
<b>Households by Income</b>								
<\$15,000			18.4%		14.9%			
\$15,000 - \$24,999			17.5%		15.0%			
\$25,000 - \$34,999			12.4%		11.3%			
\$35,000 - \$49,999			10.1%		9.8%			
\$50,000 - \$74,999			17.6%		18.8%			
\$75,000 - \$99,999			15.5%		18.6%			
\$100,000 - \$149,999			5.2%		6.8%			
\$150,000 - \$199,999			2.2%		3.3%			
\$200,000+			1.1%		1.5%			
<b>Average HH Income</b>			\$ 51,640		\$ 61,118			3.4%
<b>Median HH Income</b>			\$ 36,982		\$ 48,053			5.4%
<b>Educational Profile (For Wimauma Census-Designated Place/CDP)</b>								
<b>Years of Education (2017 American Community Survey/ACS)</b>								
Less than 9th Grade			32.2%					
9th-12th Grade, No Diploma			15.8%					
High School Graduate (Includes Equivalency)			31.5%					
Some College, No Degree			12.1%					
Associate Degree			3.0%					
Bachelor's Degree			4.2%					
Graduate/Professional Degree			1.2%					

(1) Persons of Hispanic origin are a subset of other race categories; therefore, totals do not add.  
<https://factfinder.census.gov/faces/nav/jsf/pages/index.xhtml>

Source: U.S. Census Bureau; American Community Survey; ESRI Business Analyst; WTL +a, January 2020.

**Table 4: Demographic Characteristics—Balm Community Plan Area, 2000—2024**

	2000	2010	2019	% Dist.	2024	% Dist.	Change: 2019-2024	
							No.	CAGR %
<b>Demographic Profile</b>								
<b>Population</b>	1,563	2,445	3,082		3,388		<b>306</b>	<b>1.91%</b>
<i>As % of County</i>	<i>0.16%</i>	<i>0.20%</i>	<i>0.21%</i>		<i>0.21%</i>			
<b>Households</b>	413	651	788		865		<b>77</b>	<b>1.88%</b>
<b>Avg. HH Size</b>	3.59	3.59	3.77		3.79			
<b>Median Age</b>		35.4	37.7		38.6			
<b>Race</b>								
White		1,978	2,322	75%	2,478	73%	156	1.3%
Black		99	194	6%	233	7%	39	3.7%
American Indian		23	31	1%	36	1%	5	3.0%
Asian, Pacific Islander		37	69	2%	86	3%	17	4.5%
Other		265	391	13%	464	14%	73	3.5%
Two or More Races		42	75	2%	91	3%	16	3.9%
<b>Total:</b>		<b>2,444</b>	<b>3,082</b>		<b>3,388</b>		<b>306</b>	
Hispanic (1)		795	1,199	39%	1,459	43%	260	4.0%
<b>Age Distribution</b>								
0-14		524	593	19%	650	19%	57	1.9%
15-24		361	402	13%	408	12%	6	0.3%
25-34		326	443	14%	491	14%	48	2.1%
35-44		323	371	12%	419	12%	48	2.5%
45-54		354	438	14%	425	13%	(13)	-0.6%
55-64		282	392	13%	437	13%	45	2.2%
65-74		187	296	10%	354	10%	58	3.6%
75+		86	147	5%	204	6%	57	6.8%
<b>Income Profile</b>								
<b>Households by Income</b>								
<\$15,000			6.9%		5.0%			
\$15,000 - \$24,999			5.7%		4.2%			
\$25,000 - \$34,999			4.1%		3.2%			
\$35,000 - \$49,999			10.3%		8.6%			
\$50,000 - \$74,999			20.6%		18.3%			
\$75,000 - \$99,999			15.6%		15.7%			
\$100,000 - \$149,999			19.4%		22.0%			
\$150,000 - \$199,999			9.0%		12.1%			
\$200,000+			8.5%		11.0%			
<b>Average HH Income</b>		\$ 99,377			\$ 117,167			<b>3.3%</b>
<b>Median HH Income</b>		\$ 78,092			\$ 90,532			<b>3.0%</b>
<b>Educational Profile (For Balm Census-Designated Place/CDP)</b>								
<b>Years of Education (2017 American Community Survey/ACS)</b>								
Less than 9th Grade			3.3%					
9th-12th Grade, No Diploma			14.5%					
High School Graduate (Includes Equivalency)			24.0%					
Some College, No Degree			25.5%					
Associate Degree			12.9%					
Bachelor's Degree			15.2%					
Graduate/Professional Degree			4.7%					

(1) Persons of Hispanic origin are a subset of other race categories; therefore, totals do not add.  
<https://factfinder.census.gov/faces/nav/jsf/pages/index.xhtml>

Source: U.S. Census Bureau; American Community Survey; ESRI Business Analyst; WTL +a, March 2020.

- **Average annual household incomes exhibit significant variations:**
  - **Wimauma—\$36,982 per year** (forecast growth of 3.4% per year next five years)
  - Hillsborough County—\$82,088 per year (2.8% per year growth by 2024)
  - **Balm—\$99,377 per year** (3.3% per year growth by 2024)
- Across income levels, fully 48% of Wimauma households earn less than \$35,000 per year; only 8.5% of households earn more than \$100,000 per year (compared to 37% of Balm households). Since incomes in Wimauma are forecast to increase by 3.4% per year, 12% of the area’s households are expected to earn more than \$100,000 per year by 2024; and
- According to the 2017 American Community Survey (ACS), 48% of Wimauma residents **over the age of 25** did not graduate from high school, and only 5.4% finished college and graduate school. By comparison, 17.8% of Balm residents did not graduate from high school but 20% finished college and graduate school.

## Household Retail Spending

Household incomes generally determine the level of disposable income available for household retail spending, which is the primary driver of demand for retail space such as shopping centers, “Big Box” stores such as Wal-Mart or Target, food & beverage, and specialty or destination retail projects. Household retail spending patterns among households in Hillsborough County, Wimauma and Balm are highlighted below:

- Households in Hillsborough County spend \$10.3 billion annually across various retail categories—including clothing, computers, leisure & entertainment, food & beverage, household furnishings and personal care products. This equates to **\$18,600 per household**, which is *above* the national average;
- Households in Wimauma spend \$26.3 million annually in retail goods, which equates to **\$12,385 per household** for the 2,135 households living in Wimauma;
- By comparison, households in Balm—with significantly more disposable income—spend **\$23,110 per year** across a range of retail categories for the 788 households living in Balm;

**Wimauma Households Spend \$12,385/Year on Retail—About 65% of  
What Their Counterparts Spend Across Hillsborough County**

**Table 5: Household Retail Spending, 2018**

	Hillsborough County	Wimauma CP Area	Balm CP Area
<b>Total Households (2019)</b>	<b>553,152</b>	<b>2,135</b>	<b>788</b>
<b>Apparel &amp; Accessories</b>			
Men's Wear	\$ 398	\$ 283	\$ 476
Women's Wear	686	437	827
Children's Wear	321	248	381
Footwear	469	348	552
Watches & Jewelry	134	75	158
Apparel Products & Services	62	40	73
<b>Subtotal:</b>	<b>\$ 2,071</b>	<b>\$ 1,430</b>	<b>\$ 2,467</b>
<b>Computers</b>			
Computers & Hardware	\$ 162	\$ 103	\$ 186
Software & Accessories	33	22	39
<b>Subtotal:</b>	<b>\$ 195</b>	<b>\$ 125</b>	<b>\$ 225</b>
<b>Entertainment &amp; Recreation</b>			
Membership Fees for Clubs	\$ 219	\$ 125	\$ 257
Fees for Participant Sports	104	59	129
Tickets to Theater/Operas/Concerts	69	38	79
Tickets to Movies	56	43	64
Tickets to Parks/Museums	31	20	36
Admission to Sporting Events	58	33	69
Fees for Recreational Lessons	133	77	159
Dating Services	0.73	0.48	0.77
<b>Subtotal:</b>	<b>\$ 669</b>	<b>\$ 395</b>	<b>\$ 794</b>
<b>TV/Video/Audio</b>			
Cable & Satellite TV Services	\$ 823	\$ 527	\$ 1,022
Televisions	107	76	129
Satellite Dishes	1	1	2
VCRs, Video Cameras & DVD Players	6	4	7
Miscellaneous Video Equipment	25	17	31
Video Cassettes & DVDs	11	7	14
Video Game Hardware/Accessories	29	20	32
Video Game Software	16	11	17
Rental/Streaming/Downloaded Video	48	33	55
Installation of Televisions	1	0.47	1
Audio	95	64	115
Rental & Repair of TV/Radio/Audio/Sound	3	2	3
<b>Subtotal:</b>	<b>\$ 1,167</b>	<b>\$ 762</b>	<b>\$ 1,428</b>

(1) Consumer spending data are derived from the 2016 and 2017 Consumer Expenditure Surveys conducted by the Bureau of Labor Statistics.

Source: US Department of Labor, Bureau of Labor Market Statistics; ESRI Business Analyst; WTL +a, January 2020.



**Table 5 (Continued): Household Retail Spending, 2018**

	Hillsborough County	Wimauma CP Area	Balm CP Area
<b>Other Entertainment</b>			
Pets	\$ 594	\$ 357	\$ 803
Toys & Games	115	77	139
Recreational Vehicles & Fees	127	68	171
Sports/Recreation/Exercise Equipment	203	130	255
Photo Equipment & Supplies	51	28	59
Reading	99	57	121
Catered Affairs	24	15	26
<b>Subtotal:</b>	<b>\$ 1,213</b>	<b>\$ 732</b>	<b>\$ 1,572</b>
<b>Food &amp; Alcohol</b>			
Food at Home	\$ 4,945	\$ 3,352	\$ 6,075
Food Away from Home	3,557	2,430	4,264
Alcoholic & Non-alcoholic Beverages	549	349	655
<b>Subtotal:</b>	<b>\$ 9,051</b>	<b>\$ 6,131</b>	<b>\$ 10,994</b>
<b>Household Furnishings &amp; Equipment</b>			
Household Textiles	\$ 97	\$ 62	\$ 115
Furniture	596	399	709
Floor Coverings	29	14	35
Major Appliances	333	219	439
Housewares	101	63	127
Small Appliances	47	32	56
Luggage	14	9	16
Telephones & Accessories	76	62	97
Lawn & Garden	417	238	567
Housekeeping Supplies	717	480	899
Maintenance & Remodeling Materials	428	241	631
<b>Subtotal:</b>	<b>\$ 2,854</b>	<b>\$ 1,819</b>	<b>\$ 3,690</b>
<b>Health &amp; Personal Care</b>			
Non- & Prescription Drugs	\$ 470	\$ 273	\$ 607
Optical	82	47	104
Personal Care Products	404	332	588
School Supplies	119	103	179
Smoking Products	318	237	461
<b>Subtotal:</b>	<b>\$ 1,393</b>	<b>\$ 992</b>	<b>\$ 1,939</b>
<b>TOTAL:</b>			
Total Annual Spending	<b>\$ 10,295,668,825</b>	<b>\$ 26,442,914</b>	<b>\$ 49,340,042</b>
Per Household	<b>\$ 18,613</b>	<b>\$ 12,385</b>	<b>\$ 23,110</b>
Average HH Income	\$ 82,088	\$ 51,640	\$ 99,377
As % of Average HH Income	22.7%	24.0%	23.3%

(1) Consumer spending data are derived from the 2016 and 2017 Consumer Expenditure Surveys conducted by the Bureau of Labor Statistics.

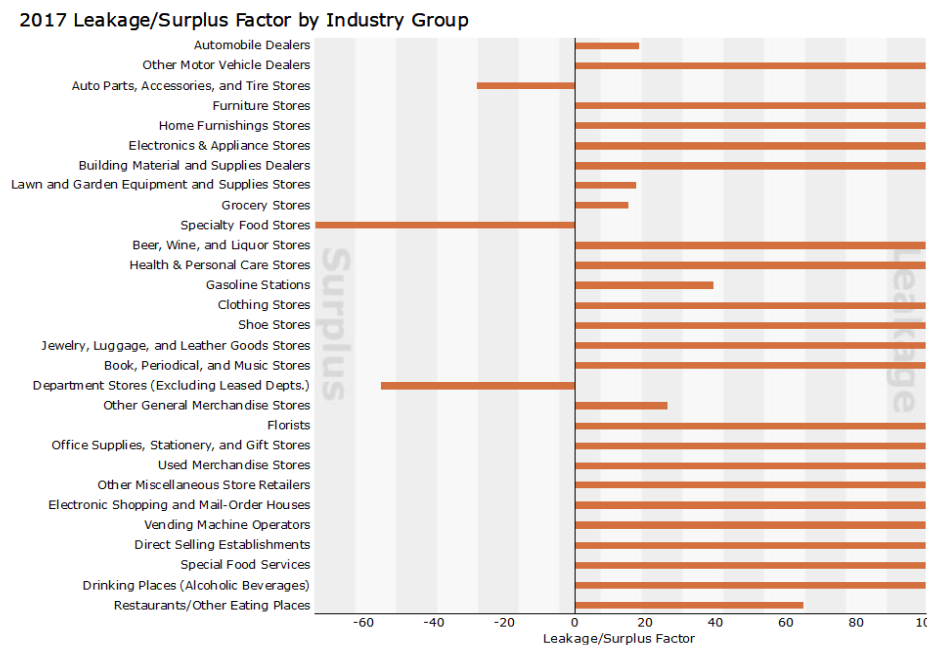
Source: US Department of Labor, Bureau of Labor Market Statistics; ESRI Business Analyst; WTL +a, January 2020.

## Retail “Recapture” Opportunities

Another key indicator of retail market potentials involves what is known as “retail opportunity gap”. This compares annual household spending (i.e., “demand”) in specific merchandise categories against estimated annual retail sales by businesses in those same categories (i.e., “supply”). The difference between demand and supply represents the “recapture” opportunity, or surplus, available in each retail category in the reporting geography.

**When demand is greater than supply, there is an apparent opportunity for additional retail space** in that category. By comparison, when demand is less than supply, there is a surplus of sales in that retail category. That is, a positive value (in green) = a potential recapture opportunity, while a negative value (in red) = a surplus of sales among businesses, or an “inflow” of sales from outside of the reporting geography. In Figure 2 and Figure 3 below, recapture opportunities among specific merchandise categories are on the right side of the graph, while surplus sales (inflow) are illustrated on the left side of the graph. Numerical findings for the Wimauma Community Plan Area are illustrated in Table 6 and in Table 7 for the Balm Community Plan Area.

**Figure 2: Retail Inflow & Leakage by Merchandise Category—Wimauma**



Default figure provided by ESRI. No adjustments can be made.

**Table 6: Annual Household Retail Inflow & Leakage—Wimauma**

Retail Category	Demand (HH Spending)	Supply (Store Sales)	"Recapture" Opportunity
<b>General Merchandise Stores</b>			
Department Stores Excl Leased Depts.	\$ 4,738,582	\$ 16,512,992	\$ (11,774,410)
Other General Merchandise Stores	2,050,087	1,193,838	856,249
<b>Subtotal:</b>	<b>\$ 6,788,669</b>	<b>\$ 17,706,830</b>	<b>\$ (10,918,161)</b>
<b>Clothing &amp; Accessories Stores</b>			
Clothing Stores	\$ 1,397,080	\$ -	\$ 1,397,080
Shoe Stores	332,775	-	332,775
Jewelry, Luggage, Leather Goods	320,816	-	320,816
<b>Subtotal:</b>	<b>\$ 2,050,671</b>	<b>\$ -</b>	<b>\$ 2,050,671</b>
<b>Furniture &amp; Home Furnishings Stores</b>			
Furniture Stores	\$ 806,638	\$ -	\$ 806,638
Home Furnishing Stores	610,971	-	610,971
<b>Subtotal:</b>	<b>\$ 1,417,609</b>	<b>\$ -</b>	<b>\$ 1,417,609</b>
<b>Electronics &amp; Appliance Stores</b>			
Appliances, TVs, Electronics Stores	\$ 1,154,365	\$ -	\$ 1,154,365
<b>Subtotal:</b>	<b>\$ 1,154,365</b>	<b>\$ -</b>	<b>\$ 1,154,365</b>
<b>Leisure &amp; Entertainment</b>			
Sporting Goods/Hobby/Musical Instruments	\$ 821,691	\$ -	\$ 821,691
Books, Periodicals & Music Stores	175,339	-	175,339
<b>Subtotal:</b>	<b>\$ 997,030</b>	<b>\$ -</b>	<b>\$ 997,030</b>
<b>Food Services &amp; Drinking Places</b>			
Special Food Services	\$ 69,353	\$ -	\$ 69,353
Drinking Places - Alcoholic Beverages	304,319	-	304,319
Restaurants/Other Eating Places	3,925,179	825,637	3,099,542
<b>Subtotal:</b>	<b>\$ 4,298,851</b>	<b>\$ 825,637</b>	<b>\$ 3,473,214</b>

Source: Bureau of Labor Statistics; Claritas, Inc.; ESRI Business Analyst; WTL +a, January 2020.

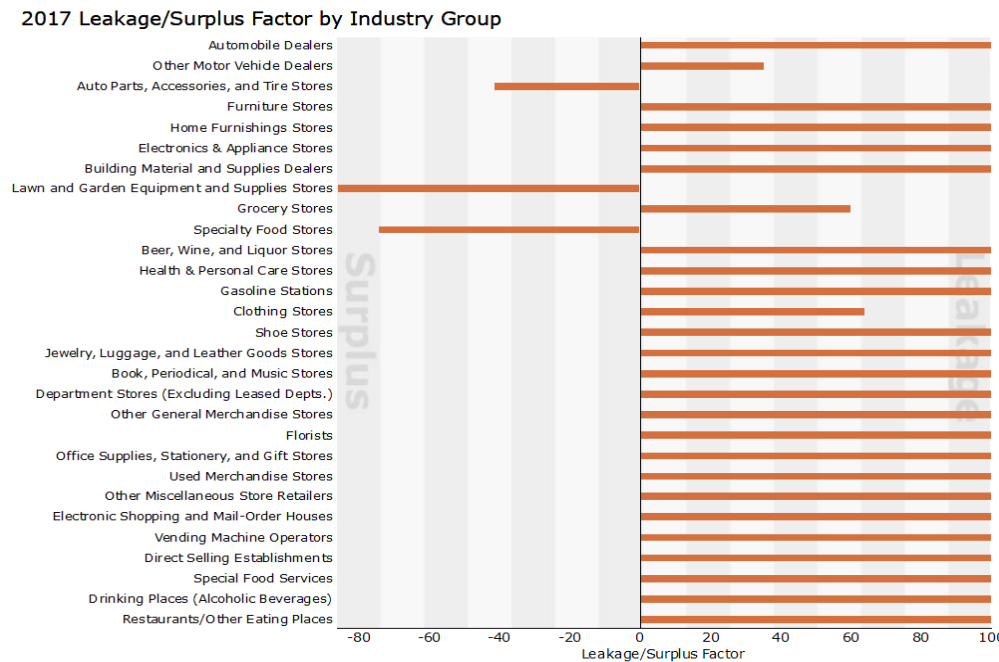
**Table 6 (Continued): Annual Household Retail Inflow & Leakage--Wimauma**

Retail Category	Demand (HH Spending)	Supply (Store Sales)	"Recapture" Opportunity
<b>Food &amp; Beverage Stores</b>			
Grocery Stores	\$ 6,718,907	\$ 4,926,826	\$ 1,792,081
Specialty Food Stores	313,057	2,107,142	(1,794,085)
Beer, Wine & Liquor Stores	329,571	-	329,571
<b>Subtotal:</b>	<b>\$ 7,361,535</b>	<b>\$ 7,033,968</b>	<b>\$ 327,567</b>
<b>Health &amp; Personal Care Stores</b>			
Health & Personal Care Stores	\$ 2,596,371	\$ -	\$ 2,596,371
<b>Subtotal:</b>	<b>\$ 2,596,371</b>	<b>\$ -</b>	<b>\$ 2,596,371</b>
<b>Building Material, Garden Equipment Stores</b>			
Building Materials & Supplies	\$ 2,370,245	\$ -	\$ 2,370,245
Lawn & Garden Equipment & Supplies	166,908	116,592	50,316
<b>Subtotal:</b>	<b>\$ 2,537,153</b>	<b>\$ 116,592</b>	<b>\$ 2,420,561</b>
<b>Miscellaneous Store Retailers</b>			
Florists	\$ 53,485	\$ -	\$ 53,485
Office Supplies, Stationery, Gift Stores	349,433	-	349,433
Used Merchandise Stores	362,174	-	362,174
Other Miscellaneous Retail Stores	825,783	-	825,783
<b>Subtotal:</b>	<b>\$ 1,590,875</b>	<b>\$ -</b>	<b>\$ 1,590,875</b>
<b>TOTAL:</b>			
<b>HH Demand vs. Retail Sales</b>	<b>\$ 30,793,129</b>	<b>\$ 25,683,027</b>	<b>\$ 5,110,102</b>
	(2)		

- (1) Claritas' "Retail Market Power" data is derived from two major sources of information. Demand data are derived from Consumer Expenditure Surveys fielded by the U.S. Bureau of Labor Statistics (BLS). Supply data are derived from the Census Bureau. The difference between demand and supply represents the "recapture opportunity", or surplus, available for each retail category in the reporting geography. When demand is greater than supply, there is an apparent opportunity for additional retail space in that category. By comparison, when demand is less than supply, there is a surplus of sales in that retail category (i.e., positive value = recapture opportunity, while negative value = surplus of sales).
- (2) Total household retail spending excludes spending on Non-Store Retailers (Internet); Motor Vehicle Parts and Dealers; and Gas Stations.

Source: Bureau of Labor Statistics; Claritas, Inc.; ESRI Business Analyst; WTL +a, January 2020.

Figure 3: Retail Inflow & Leakage by Merchandise Category—Balm



Default figure provided by ESRI. No adjustments can be made.

- ESRI (Claritas) data suggests that the amount of household retail spending leaving Wimauma and Balm is sizable. Between the two community plan areas, **there is more than \$30 million in annual retail leakage** across multiple retail merchandise categories, including:
  - **Net retail leakage in Wimauma (\$5.1 million per year)** is offset by significant retail *inflow* (i.e., spending from sources other than resident households) in the General Merchandise category of approximately \$11.8 million annually). This can be attributed to the presence of both Walmart and Dollar General. **Without that inflow, Wimauma households spend almost \$16.9 million per year outside of Wimauma**

**Annual Retail Leakage: \$16.9 Million/Year in Household Spending Leaves Wimauma**

**Table 7: Annual Household Retail Inflow & Leakage—Balm**

Retail Category	Demand (HH Spending)	Supply (Store Sales)	"Recapture" Opportunity
<b>General Merchandise Stores</b>			
Department Stores Excl Leased Depts.	\$ 3,159,994	\$ -	\$ 3,159,994
Other General Merchandise Stores	1,371,200	-	1,371,200
<b>Subtotal:</b>	<b>\$ 4,531,194</b>	<b>\$ -</b>	<b>\$ 4,531,194</b>
<b>Clothing &amp; Accessories Stores</b>			
Clothing Stores	\$ 922,533	\$ 202,918	\$ 719,615
Shoe Stores	211,782	-	211,782
Jewelry, Luggage, Leather Goods	224,507	-	224,507
<b>Subtotal:</b>	<b>\$ 1,358,822</b>	<b>\$ 202,918</b>	<b>\$ 1,155,904</b>
<b>Furniture &amp; Home Furnishings Stores</b>			
Furniture Stores	\$ 542,154	\$ -	\$ 542,154
Home Furnishing Stores	448,129	-	448,129
<b>Subtotal:</b>	<b>\$ 990,283</b>	<b>\$ -</b>	<b>\$ 990,283</b>
<b>Electronics &amp; Appliance Stores</b>			
Appliances, TVs, Electronics Stores	\$ 779,494	\$ -	\$ 779,494
<b>Subtotal:</b>	<b>\$ 779,494</b>	<b>\$ -</b>	<b>\$ 779,494</b>
<b>Leisure &amp; Entertainment</b>			
Sporting Goods/Hobby/Musical Instruments	\$ 560,133	\$ -	\$ 560,133
Books, Periodicals & Music Stores	111,826	-	111,826
<b>Subtotal:</b>	<b>\$ 671,959</b>	<b>\$ -</b>	<b>\$ 671,959</b>
<b>Food Services &amp; Drinking Places</b>			
Special Food Services	\$ 48,619	\$ -	\$ 48,619
Drinking Places - Alcoholic Beverages	220,099	-	220,099
Restaurants/Other Eating Places	2,632,515	-	2,632,515
<b>Subtotal:</b>	<b>\$ 2,901,233</b>	<b>\$ -</b>	<b>\$ 2,901,233</b>

Source: Bureau of Labor Statistics; Claritas, Inc.; ESRI Business Analyst; WTL +a, March 2020.

**Table 7 (Continued): Annual Household Retail Inflow & Leakage—Balm**

Retail Category	Demand (HH Spending)	Supply (Store Sales)	"Recapture" Opportunity
<b>Food &amp; Beverage Stores</b>			
Grocery Stores	\$ 4,446,955	\$ 1,107,386	\$ 3,339,569
Specialty Food Stores	204,509	1,391,666	(1,187,157)
Beer, Wine & Liquor Stores	232,233	-	232,233
<b>Subtotal:</b>	<b>\$ 4,883,697</b>	<b>\$ 2,499,052</b>	<b>\$ 2,384,645</b>
<b>Health &amp; Personal Care Stores</b>			
Health & Personal Care Stores	\$ 1,863,075	\$ -	\$ 1,863,075
<b>Subtotal:</b>	<b>\$ 1,863,075</b>	<b>\$ -</b>	<b>\$ 1,863,075</b>
<b>Building Material, Garden Equipment Stores</b>			
Building Materials & Supplies	\$ 1,855,751	\$ -	\$ 1,855,751
Lawn & Garden Equipment & Supplies	149,949	2,032,544	(1,882,595)
<b>Subtotal:</b>	<b>\$ 2,005,700</b>	<b>\$ 2,032,544</b>	<b>\$ (26,844)</b>
<b>Miscellaneous Store Retailers</b>			
Florists	\$ 46,802	\$ -	\$ 46,802
Office Supplies, Stationery, Gift Stores	238,658	-	238,658
Used Merchandise Stores	239,980	-	239,980
Other Miscellaneous Retail Stores	616,827	-	616,827
<b>Subtotal:</b>	<b>\$ 1,142,267</b>	<b>\$ -</b>	<b>\$ 1,142,267</b>
<b>TOTAL:</b>			
<b>HH Demand vs. Retail Sales</b>	<b>\$ 21,127,724</b>	<b>\$ 4,734,514</b>	<b>\$ 16,393,210</b>
	(2)		

- (1) Claritas' "Retail Market Power" data is derived from two major sources of information. Demand data are derived from Consumer Expenditure Surveys fielded by the U.S. Bureau of Labor Statistics (BLS). Supply data are derived from the Census Bureau. The difference between demand and supply represents the "recapture opportunity", or surplus, available for each retail category in the reporting geography. When demand is greater than supply, there is an apparent opportunity for additional retail space in that category. By comparison, when demand is less than supply, there is a surplus of sales in that retail category (i.e., positive value = recapture opportunity, while negative value = surplus of sales).
- (2) Total household retail spending excludes spending on Non-Store Retailers (Internet); Motor Vehicle Parts and Dealers; and Gas Stations.

Source: Bureau of Labor Statistics; Claritas, Inc.; ESRI Business Analyst; WTL +a, March 2020.

- **Net retail leakage in Wimauma (\$16.4 million per year)** is offset by retail *inflow* (i.e., spending from sources other than resident households) in several categories, including Specialty Food Stores and Lawn & Garden Equipment. This can be attributed to the presence of farm stands and agricultural processing facilities. **Without that inflow, Balm households generate more than \$19.4 million per year in retail spending *outside* of Balm**

**Annual Retail Leakage: \$19.4 Million/Year in  
Household Spending *Leaves* Balm**

- **This leakage represents a possible “recapture” opportunity to support new retail development in select locations of Wimauma Village and/or the WVR-2 and RP-2 focus areas.** This is also known as “unmet demand”. However, WTL+a notes that total store sales also includes revenues generated by Wholesale Trade businesses (e.g., agricultural production/food processing), so estimated “recapture opportunities” may overstate sales leakage generated by actual household retail spending.

## Employment & Business Mix

Job growth is a key barometer of demand for “workplace” uses such as multi-tenant office space, industrial parks, retail centers and the like. WTL+a examined trends and forecasts in employment growth, utilizing data for Hillsborough County as prepared by the state’s labor agency, the Department of Economic Opportunity (DEO), for the period between 1995 and 2019. This data is critical to understanding economic development potentials in Wimauma, particularly in the Light Industrial/Office sub-area. Key findings are summarized below and illustrated in Table 8 through Table 15:

### Hillsborough County

- As illustrated in Table 9, according to the state’s Department of Economic Opportunity (DEO), Hillsborough County contains 797,400 jobs, or roughly 57% of the 1,406,800 total jobs in the Tampa—St. Petersburg MSA. This includes both full-time and part-time jobs;



**Table 8: Employment Trends—Tampa-St. Petersburg MSA, 1995—2019**

Industry Sector	1995	2000	2005	Change: 1995-2005		2007	2009	2011	2013	2015	2017	2019	Change: 2007-2019	
				Amount	CAGR %								Amount	CAGR %
<b>Agriculture &amp; Mining</b>	400	500	800	400	7.2%	700	500	500	400	300	300	300	(400)	-6.8%
<b>Construction</b>	57,000	68,800	92,200	35,200	4.9%	82,200	55,200	52,900	58,500	64,700	75,300	84,400	2,200	0.2%
<b>Manufacturing</b>	79,700	88,700	78,500	(1,200)	-0.2%	73,800	58,300	59,100	60,800	62,200	67,100	70,200	(3,600)	-0.4%
<b>Transp/Warehousing/Utilities</b>	33,200	37,500	32,200	(1,000)	-0.3%	29,800	25,900	27,300	28,600	31,700	31,700	34,600	4,800	1.3%
<b>Trade</b>														
Wholesale	51,000	57,400	53,600	2,600	0.5%	54,800	46,700	47,800	49,600	52,400	52,800	53,600	(1,200)	-0.2%
Retail	138,900	155,800	157,600	18,700	1.3%	156,700	140,800	147,500	155,000	163,600	172,600	169,400	12,700	0.7%
<b>Information</b>	29,800	40,900	32,200	2,400	0.8%	31,300	26,500	26,200	26,000	25,800	25,300	25,500	(5,800)	-1.7%
<b>Financial Activities</b>	72,400	94,300	104,200	31,800	3.7%	101,800	90,800	94,200	101,300	106,500	115,300	122,600	20,800	1.6%
<b>Services</b>														
Prof'l/Business Services	93,100	167,100	190,400	97,300	7.4%	193,300	169,600	188,000	201,200	228,500	240,500	257,400	64,100	2.4%
Education/Health Services	143,800	143,700	159,600	15,800	1.0%	173,400	178,600	182,800	187,100	202,100	208,700	218,400	45,000	1.9%
Leisure & Hospitality	111,200	117,400	129,500	18,300	1.5%	130,900	118,800	123,200	134,400	146,500	154,000	164,000	33,100	1.9%
Other Services	42,100	45,100	47,000	4,900	1.1%	48,600	42,400	40,600	43,300	43,000	46,400	48,500	(100)	0.0%
<b>Government</b>	134,200	147,900	150,700	16,500	1.2%	155,000	155,600	155,100	154,400	155,100	159,200	157,900	2,900	0.2%
<b>Total (in 000s):</b>	<b>986,800</b>	<b>1,165,100</b>	<b>1,228,500</b>	<b>241,700</b>	<b>2.2%</b>	<b>1,232,300</b>	<b>1,109,700</b>	<b>1,145,200</b>	<b>1,200,600</b>	<b>1,282,400</b>	<b>1,349,200</b>	<b>1,406,800</b>	<b>174,500</b>	<b>1.1%</b>
Change During Period:	-	178,300	63,400			3,800	(122,600)	35,500	55,400	81,800	66,800	57,600		

(1) As of year-end for each reported year.

<http://floridajobs.org/labor-market-information/data-center/statistical-programs/current-employment-statistics>

Source: Florida Department of Economic Opportunity; WTL +a, February 2020.

**Table 9: Business Mix—Hillsborough County, 2018**

NAICS Category	Businesses		Employees	
	No.	% of Total	No.	% of Total
<b>Mining &amp; Natural Resources</b>	<b>977</b>	1.8%	<b>7,193</b>	1.1%
<b>Construction</b>	<b>3,376</b>	6.1%	<b>28,873</b>	4.5%
<b>Manufacturing</b>	<b>1,341</b>	2.4%	<b>31,786</b>	5.0%
<b>Transportation &amp; Warehousing</b>	<b>1,329</b>	2.4%	<b>15,542</b>	2.4%
<b>Communications</b>	<b>502</b>	0.9%	<b>6,457</b>	1.0%
<b>Utilities</b>	<b>92</b>	0.2%	<b>2,287</b>	0.4%
<b>Wholesale &amp; Retail Trade</b>				
Wholesale	1,869		29,213	
Retail	10,329		142,242	
- Home Improvement	601		7,774	
- General Merchandise	415		15,861	
- Food Stores	1,166		20,967	
- Auto Dealers/Gas Stations	1,255		13,471	
- Apparel & Accessory Stores	660		5,174	
- Furniture/Home Furnishings	759		6,932	
- Eating & Drinking Places	3,044		50,651	
- Miscellaneous & Non-store Retail	2,429		21,412	
<b>Subtotal - All Retail:</b>	<b>12,198</b>	22.0%	<b>171,455</b>	27.0%
<b>Finance/Insurance/Real Estate</b>	<b>5,806</b>	10.5%	<b>58,508</b>	9.2%
<b>Services</b>				
- Hotel/Lodging	323		9,748	
- Automotive Services	1,531		8,924	
- Motion Pictures & Amusements	1,525		16,049	
- Health Services	3,431		75,180	
- Legal Services	1,403		12,223	
- Educational Institutions	914		53,210	
- Other Services	12,634		111,759	
<b>Subtotal - Services:</b>	<b>21,761</b>	39.2%	<b>287,093</b>	45.2%
<b>Government</b>	<b>584</b>	1.1%	<b>23,179</b>	3.6%
<b>Unclassified Establishments</b>	<b>7,549</b>	13.6%	<b>3,212</b>	0.5%
<b>TOTAL:</b>	<b>55,515</b>	<b>100.0%</b>	<b>635,585</b>	<b>100.0%</b>

ANALYSIS:	
<b>2019 Employment</b>	635,585
<b>2019 Population</b>	1,454,648
<b>Jobs/Population Ratio</b>	<b>0.44</b>

Source: ESRI Business Analyst; InfoGroup, Inc.; Dun & Bradstreet, Inc.; WTL +a, January 2020.

- By comparison, Dun & Bradstreet, Inc. data indicate 635,585 *full-time* jobs in 55,515 businesses, reflecting a jobs-to-population ratio of 0.44 (i.e., there are 44 jobs for every 100 residents), and reflects the concentration of larger employment centers such as downtown Tampa and suburban locations such as Westshore and Brandon. The difference between the two sources reflects part-time jobs, self-employed and jobs reporting to the Unemployment Insurance Fund;
- Employment is concentrated in particular sectors, including Services (45%), Wholesale/Retail Trade (27%), and Financial Activities (9%);
- According to U.S. Census Bureau data in Table 10, **Hillsborough County lost almost 65,400 jobs during the national recession between 2008 and 2010**. However, since recovery commenced in 2011, the County gained more than 142,800 new jobs across multiple industry sectors. The greatest job gains were recorded in Healthcare (25,700 new jobs), Professional & Business Services (19,900), Accommodation & Food Services (18,700) and Retail (15,350); and
- The Agriculture & Mining sector lost over 4,100 jobs in Hillsborough County between 2006 and 2017 (latest data available).

Employment forecasts for specific jurisdictions in Florida (defined as “Workforce Development Regions”) are also prepared by the Department of Economic Opportunity in eight-year forecast periods. As illustrated in Table 11, these forecasts suggest that:

- According to DEO, **Hillsborough County is expected to add 59,500 new jobs in the eight-year period between 2019 and 2027**, equating to 7,400 new jobs annually;
- The Services sector is expected to comprise fully 69% of all new jobs in the county—adding over 41,000 new jobs—with the largest gains expected in Health Care, Professional and Business Services and Accommodation & Food Service sectors. This could be expected to fuel demand for professional and medical office space, and lodging;
- Notably, **the only sector that is forecast to lose jobs is Agriculture**—with a decline of 762 jobs; and

**Table 10: Employment Trends—Hillsborough County, 2006—2017**

Industry Sector	2006	2007	National Recession			2011	2012	2013	2014	2015	2016	2017	Change: 2006-2017	
			2008	2009	2010								Amount	CAGR %
<b>Agriculture &amp; Mining</b>	11,612	12,716	12,661	13,061	13,666	12,025	10,574	11,173	11,385	10,556	9,516	7,501	(4,111)	-3.9%
<b>Construction</b>	40,104	41,755	37,764	29,451	25,146	25,456	25,734	27,445	31,603	34,135	37,117	38,667	(1,437)	-0.3%
<b>Manufacturing</b>	31,932	31,571	29,542	26,460	23,562	24,143	24,487	25,202	26,605	25,730	26,771	26,317	(5,615)	-1.7%
<b>Transp &amp; Warehousing</b>	16,677	17,049	17,046	15,091	14,364	15,683	16,527	16,264	17,435	18,803	19,601	19,610	2,933	1.5%
<b>Utilities</b>	3,426	3,513	3,459	3,444	3,122	3,132	3,214	3,113	3,160	3,118	3,041	2,754	(672)	-2.0%
<b>Trade</b>														
Wholesale	33,146	35,091	33,857	31,037	29,897	31,188	32,957	33,086	33,305	34,597	36,440	37,151	4,005	1.0%
Retail	64,309	63,937	65,509	61,094	57,084	63,821	70,267	71,146	71,392	77,153	81,420	79,663	15,354	2.0%
<b>Information</b>	20,667	21,412	20,020	18,096	16,676	16,498	16,746	16,390	16,544	16,492	16,876	15,897	(4,770)	-2.4%
<b>Finance &amp; Insurance</b>	47,235	50,335	48,562	45,547	41,205	47,100	48,367	49,745	53,027	56,333	59,175	61,315	14,080	2.4%
<b>Real Estate/Rental &amp; Leasing</b>	12,674	12,522	12,195	11,839	10,313	11,241	12,375	12,468	12,553	13,186	13,786	14,300	1,626	1.1%
<b>Services</b>														
Prof'l/Business Services	46,781	50,302	52,160	51,236	49,933	52,898	53,809	54,458	55,550	60,331	64,836	66,726	19,945	3.3%
Management of Companies	6,134	7,861	7,898	7,055	8,211	8,828	8,935	11,719	10,673	12,804	13,035	12,314	6,180	6.5%
Administration/Waste Mgmt.	81,897	65,862	54,883	43,953	44,040	50,041	50,835	50,248	52,208	57,631	66,522	68,940	(12,957)	-1.6%
Educational Services	40,403	43,235	42,741	44,120	44,813	46,778	35,989	48,222	49,083	49,168	49,103	46,813	6,410	1.3%
Health Care & Social Assistance	58,515	64,233	66,360	68,659	76,844	76,542	70,624	77,917	79,381	83,357	80,878	84,270	25,755	3.4%
Arts/Entertainment/Recreation	13,845	15,121	15,206	13,659	13,616	14,034	10,285	9,927	11,251	13,327	16,887	16,829	2,984	1.8%
Accommodation & Food Services	46,093	48,675	47,867	47,685	47,489	48,937	52,856	53,584	58,675	64,549	63,667	64,824	18,731	3.1%
Other Services	16,964	18,787	18,415	15,684	15,508	16,927	17,455	17,556	17,207	17,999	18,204	18,742	1,778	0.9%
<b>Public Administration/Gov't</b>	24,101	21,390	23,453	22,879	24,516	24,410	23,427	23,358	22,773	21,712	20,248	20,197	(3,904)	-1.6%
<b>Total (In 000s):</b>	<b>616,515</b>	<b>625,367</b>	<b>609,598</b>	<b>570,050</b>	<b>560,005</b>	<b>589,682</b>	<b>585,463</b>	<b>613,021</b>	<b>633,810</b>	<b>670,981</b>	<b>697,123</b>	<b>702,830</b>	<b>86,315</b>	<b>1.2%</b>
<i>Annual Change</i>	-	8,852	(15,769)	(39,548)	(10,045)	29,677	(4,219)	27,558	20,789	37,171	26,142	5,707		
<i>Annual % Change</i>	-	1.4%	-2.5%	-6.5%	-1.8%	5.3%	-0.7%	4.7%	3.4%	5.9%	3.9%	0.8%		

Source: U.S. Census Bureau, On-the-Map; WTL +a, February 2020.

**Table 11: Employment Forecasts—Hillsborough County, 2019—2027**

Employment Category	2019	% Dist.	2027	Change: 2019-2027		
				% Dist.	Total	CAGR
<b>Agriculture &amp; Mining</b>						
Agriculture	6,558		5,797		(761)	-1.5%
Mining	149		148		(1)	0.0%
<b>Subtotal:</b>	<b>6,707</b>	<b>0.8%</b>	<b>5,945</b>	<b>0.7%</b>	<b>(762)</b>	<b>-1.5%</b>
<b>Construction</b>	<b>42,482</b>	<b>5.3%</b>	<b>46,735</b>	<b>5.5%</b>	<b>4,253</b>	<b>1.2%</b>
<b>Manufacturing</b>						
Durable Goods Manufacturing	16,918		17,726		808	0.6%
Non-Durable Goods Manufacturing	12,292		12,445		153	0.2%
<b>Subtotal:</b>	<b>29,210</b>	<b>3.7%</b>	<b>30,171</b>	<b>3.5%</b>	<b>961</b>	<b>0.4%</b>
<b>Transportation/Communications/Public Utilities</b>						
Public Utilities	2,400		2,406		6	0.0%
Transportation & Warehousing	19,478		21,359		1,881	1.2%
<b>Subtotal:</b>	<b>21,878</b>	<b>2.7%</b>	<b>23,765</b>	<b>2.8%</b>	<b>1,887</b>	<b>1.0%</b>
<b>Wholesale &amp; Retail Trade</b>						
Wholesale Trade	34,189		34,681		492	0.2%
Retail Trade	79,822		81,017		1,195	0.2%
<b>Subtotal:</b>	<b>114,011</b>	<b>14.3%</b>	<b>115,698</b>	<b>13.5%</b>	<b>1,687</b>	<b>0.2%</b>
<b>Financial Activities &amp; Information</b>						
Information	17,589		17,951		362	0.3%
Finance & Insurance	63,714		69,351		5,637	1.1%
Real Estate, Rental & Leasing	15,418		16,377		959	0.8%
<b>Subtotal:</b>	<b>96,721</b>	<b>12.1%</b>	<b>103,679</b>	<b>12.1%</b>	<b>6,958</b>	<b>0.9%</b>
<b>Services</b>						
Professional, Scientific & Technical Services	71,527		83,485		11,958	2.0%
Management of Companies & Enterprises	11,869		13,666		1,797	1.8%
Administrative & Waste Management	61,609		63,881		2,272	0.5%
Educational Services	12,750		14,944		2,194	2.0%
Health Care & Social Assistance	90,197		104,109		13,912	1.8%
Arts, Entertainment & Recreation	15,762		17,250		1,488	1.1%
Accommodation & Food Services	63,986		69,489		5,503	1.0%
Other Services (Except Government)	24,345		26,253		1,908	0.9%
<b>Subtotal:</b>	<b>352,045</b>	<b>44.1%</b>	<b>393,077</b>	<b>45.9%</b>	<b>41,032</b>	<b>1.4%</b>
<b>Government</b>	<b>85,056</b>	<b>10.7%</b>	<b>84,507</b>	<b>9.9%</b>	<b>(549)</b>	<b>-0.1%</b>
<b>Self-Employed &amp; Unpaid Family Workers</b>	<b>49,319</b>	<b>6.2%</b>	<b>53,341</b>	<b>6.2%</b>	<b>4,022</b>	<b>1.0%</b>
<b>TOTAL:</b>	<b>797,429</b>		<b>856,918</b>		<b>59,489</b>	<b>0.9%</b>
Hillsborough As % of Tampa MSA		<b>57%</b>				
Annual Increase (Rounded):					<b>7,400</b>	

<http://www.floridajobs.org/workforce-statistics/data-center/statistical-programs/employment-projections>

Source: Florida Department of Economic Opportunity, Bureau of Labor Statistics; WTL +a, January 2020.

- As a proportion of total jobs, the Manufacturing, Government and Wholesale/Retail Trade sectors are expected to decline, Financial Activities will remain stable, and Services is expected to increase (from 44% to 46%).

**After Losing 4,100 Agriculture Jobs (2006—2017), DEO Forecasts a Decline of 762 Jobs in this Sector Countywide (2019—2027)**

### **Wimauma Community Plan Area**

WTL+a also examined employment trends in both the Wimauma and Balm Community Plan Areas. Key findings are summarized below and highlighted in Table 12 and Table 13.

- Dun & Bradstreet data suggest that there are **954 jobs provided by 108 businesses in Wimauma**, which suggests a **very low jobs-to-population ratio of only 0.11 for Wimauma’s 9,000 residents**. That is, there are 11 jobs for every 100 residents;
- According to U.S. Census Bureau data, between 2006 and 2017 (latest data available), **only 67 new jobs were created in the Wimauma Community Plan Area**;
- As illustrated in Table 13, there were **significant declines in the number of jobs in Agriculture**—declining from 817 jobs in 2007 to 213 jobs in 2017. In fact, the Agriculture sector in Wimauma has exhibited significant year-to-year variations in employment, likely as a result of the use of temporary labor and the impacts of international trade in this sector;
- As illustrated in Figure 5, according to U.S. Census data (2017), 2,679 Wimauma residents in the labor force left daily to work elsewhere, while 573 residents living elsewhere arrived in Wimauma for work; and
- If Wimauma *maintains* its current “fair share” (0.14%) of all jobs in Hillsborough County in the future, this would translate into **only 86 new jobs by 2027** based on the state’s forecast. This reinforces the importance of a business recruitment strategy in Wimauma aimed at securing specific businesses/industries and net new job creation.

**Fair Share Analysis Suggests Limited Job Prospects in Wimauma & Importance of Business Recruitment Strategy to Generate New Jobs**

Figure 4: Employment Densities—Wimauma, 2017

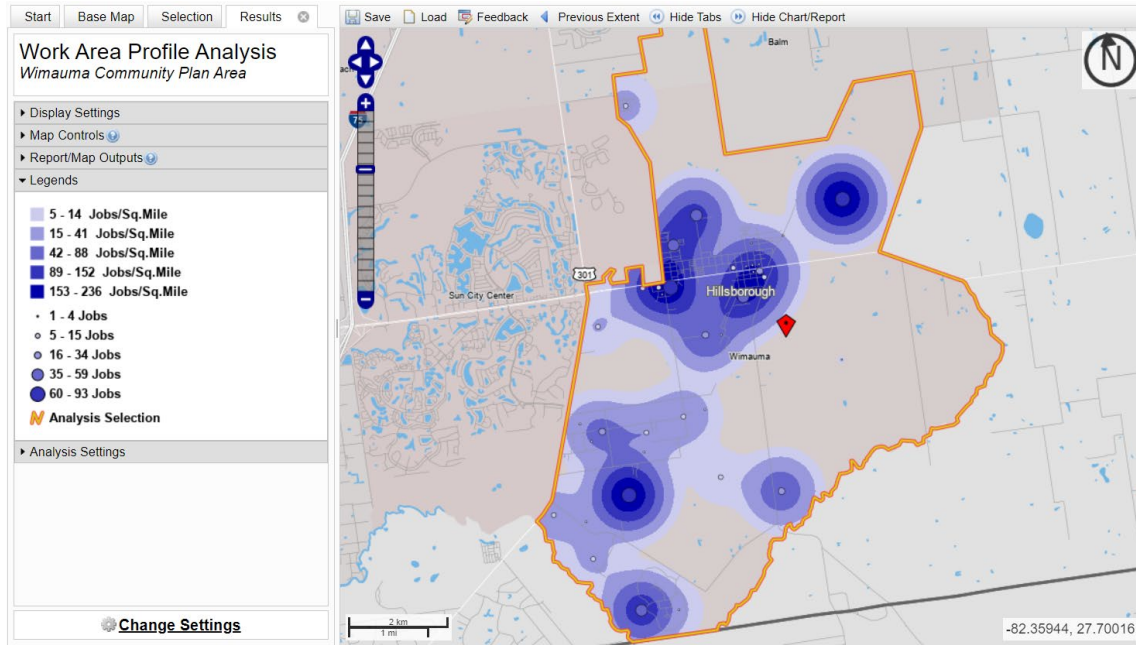
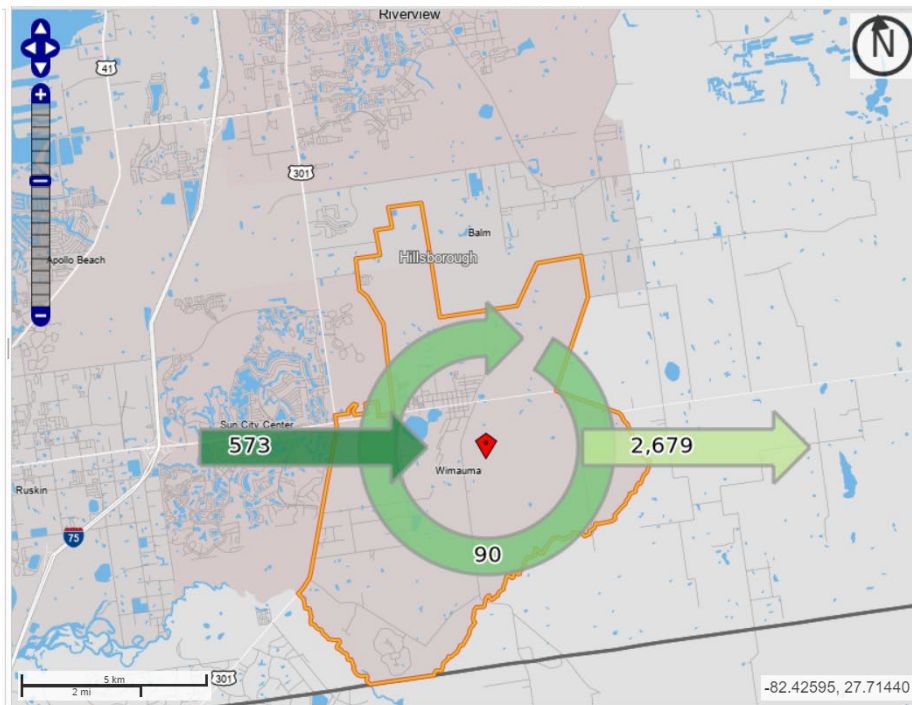


Figure 5: Inflow/Outflow of Daily Labor Force—Wimauma, 2017



**Table 12: Business Mix—Wimauma, 2018**

NAICS Category	Businesses		Employees	
	No.	% of Total	No.	% of Total
<b>Agriculture &amp; Mining</b>	<b>5</b>	4.6%	<b>19</b>	2.0%
<b>Construction</b>	<b>11</b>	10.2%	<b>56</b>	5.9%
<b>Manufacturing</b>	-	0.0%	<b>5</b>	0.5%
<b>Transportation &amp; Warehousing</b>	<b>6</b>	5.6%	<b>37</b>	3.9%
<b>Communications</b>	<b>1</b>	0.9%	<b>3</b>	0.3%
<b>Utilities</b>	-	0.0%	-	0.0%
<b>Wholesale &amp; Retail Trade</b>				
Wholesale	3		215	
Retail	25		242	
- Home Improvement	2		5	
- General Merchandise	3		100	
- Food Stores	10		74	
- Auto Dealers/Gas Stations	3		24	
- Apparel & Accessory Stores	-		-	
- Furniture/Home Furnishings	2		13	
- Eating & Drinking Places	4		19	
- Miscellaneous & Non-store Retail	1		7	
<b>Subtotal - All Retail:</b>	<b>28</b>	25.9%	<b>457</b>	47.9%
<b>Finance/Insurance/Real Estate</b>	<b>8</b>	7.4%	<b>30</b>	3.1%
<b>Services</b>				
- Hotel/Lodging	-		-	
- Automotive Services	6		26	
- Motion Pictures & Amusements	2		2	
- Health Services	2		16	
- Legal Services	-		2	
- Educational Institutions	3		161	
- Other Services	27		120	
<b>Subtotal - Services:</b>	<b>40</b>	37.0%	<b>327</b>	34.3%
<b>Government</b>	<b>1</b>	0.9%	<b>8</b>	0.8%
<b>Unclassified Establishments</b>	<b>8</b>	7.4%	<b>12</b>	1.3%
<b>TOTAL:</b>	<b>108</b>	<b>100.0%</b>	<b>954</b>	<b>100.0%</b>

<b>ANALYSIS:</b>	
2018 Employment	954
As Share of Hillsborough County	<b>0.2%</b>
2019 Population	9,003
Jobs/Population Ratio	<b>0.11</b>

Source: ESRI Business Analyst; InfoGroup, Inc.; Dun & Bradstreet, Inc.; WTL +a, January 2020.

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**Table 13: Employment Trends—Wimauma, 2006—2017**

Industry Sector	2006	2007	National Recession			2011	2012	2013	2014	2015	2016	2017	2017 % Dist.	Change: 2006-2017	
			2008	2009	2010									Amount	CAGR %
<b>Agriculture &amp; Mining</b>	305	817	657	730	434	324	694	558	271	695	287	213	32.1%	(92)	-3.2%
<b>Construction</b>	32	33	23	9	20	20	24	30	37	84	110	57	8.6%	25	5.4%
<b>Manufacturing</b>	10	9	9	12	18	14	12	19	28	25	34	27	4.1%	17	9.4%
<b>Transp &amp; Warehousing</b>	7	11	12	-	-	-	1	1	1	3	-	1	0.2%	(6)	-16.2%
<b>Utilities</b>	-	-	-	-	-	-	-	-	-	-	-	-	0.0%	-	0.0%
<b>Trade</b>															
Wholesale	8	9	5	7	10	16	23	1	5	2	-	1	0.2%	(7)	-17.2%
Retail	54	47	41	52	46	42	39	41	56	61	50	60	9.0%	6	1.0%
<b>Information</b>	-	-	-	-	-	-	-	-	-	-	-	-	0.0%	-	0.0%
<b>Finance &amp; Insurance</b>	9	2	3	2	2	2	4	4	1	1	-	-	0.0%	(9)	-100.0%
<b>Real Estate/Rental &amp; Leasing</b>	6	1	7	-	-	-	1	3	2	4	2	4	0.6%	(2)	-3.6%
<b>Services</b>															
Prof/Business Services	8	18	17	16	21	28	26	21	12	21	20	31	4.7%	23	13.1%
Management of Companies	-	-	-	1	-	1	-	-	-	-	-	-	0.0%	-	0.0%
Administration/Waste Mgmt.	67	75	227	180	163	75	167	122	135	96	99	94	14.2%	27	3.1%
Educational Services	-	2	-	-	-	-	-	-	33	35	54	47	7.1%	47	100.0%
Health Care & Social Assistance	40	43	46	40	44	157	122	125	80	168	106	117	17.6%	77	10.2%
Arts/Entertainment/Recreation	2	5	3	8	8	7	10	5	7	-	-	-	0.0%	(2)	-100.0%
Accommodation & Food Services	30	10	5	-	3	3	15	14	6	5	9	5	0.8%	(25)	-15.0%
Other Services	18	15	9	15	9	10	9	17	3	5	9	6	0.9%	(12)	-9.5%
<b>Public Administration/Gov't</b>	-	1	-	-	-	-	-	-	-	-	-	-	0.0%	-	0.0%
<b>Total (In 000s):</b>	<b>596</b>	<b>1,098</b>	<b>1,064</b>	<b>1,072</b>	<b>778</b>	<b>699</b>	<b>1,147</b>	<b>961</b>	<b>677</b>	<b>1,205</b>	<b>780</b>	<b>663</b>		<b>67</b>	<b>1.0%</b>
<i>Annual Change:</i>	-	502	(34)	8	(294)	(79)	448	(186)	(284)	528	(425)	(117)			
<i>Job Loss (As % of All Jobs):</i>			-3.2%	1%	-38%	-11%	39%	-19%	-42%	44%	-54%	-18%			
<b>Wimauma As % of County:</b>	<b>0.1%</b>	<b>0.2%</b>	<b>0.2%</b>	<b>0.2%</b>	<b>0.1%</b>	<b>0.1%</b>	<b>0.2%</b>	<b>0.16%</b>	<b>0.11%</b>	<b>0.18%</b>	<b>0.11%</b>	<b>0.09%</b>		<b>12-Year Avg:</b>	<b>0.14%</b>

Source: U.S. Census Bureau, On-the-Map; WTL +a, February 2020.

## Balm Community Plan Area

WTL+a also examined employment trends in both the Wimauma and Balm Community Plan Areas. Key findings are summarized below and highlighted in Table 14 and Table 15.

- Dun & Bradstreet data suggest that there are **403 jobs provided by 43 businesses in Balm**, which suggests a **very low jobs-to-population ratio of only 0.13** for Balm’s 3,082 residents. That is, there are 13 jobs for every 100 residents;
- According to U.S. Census Bureau data, between 2006 and 2017 (latest data available), **there was a net loss of (21) jobs in the Balm Community Plan Area**. Similar to Wimauma, there were significant declines in the number of jobs in Agriculture—declining from 677 jobs in 2007 to 95 jobs in 2017;
- While the Balm Community Plan Area lost 155 jobs during the 2008—2010 recession, Census data indicate that **another 464 job losses occurred when the economic recovery began in 2011**. This is again attributable to the significant year-to-year variations in the Agriculture sector;

**Figure 6: Employment Densities—Balm, 2017**

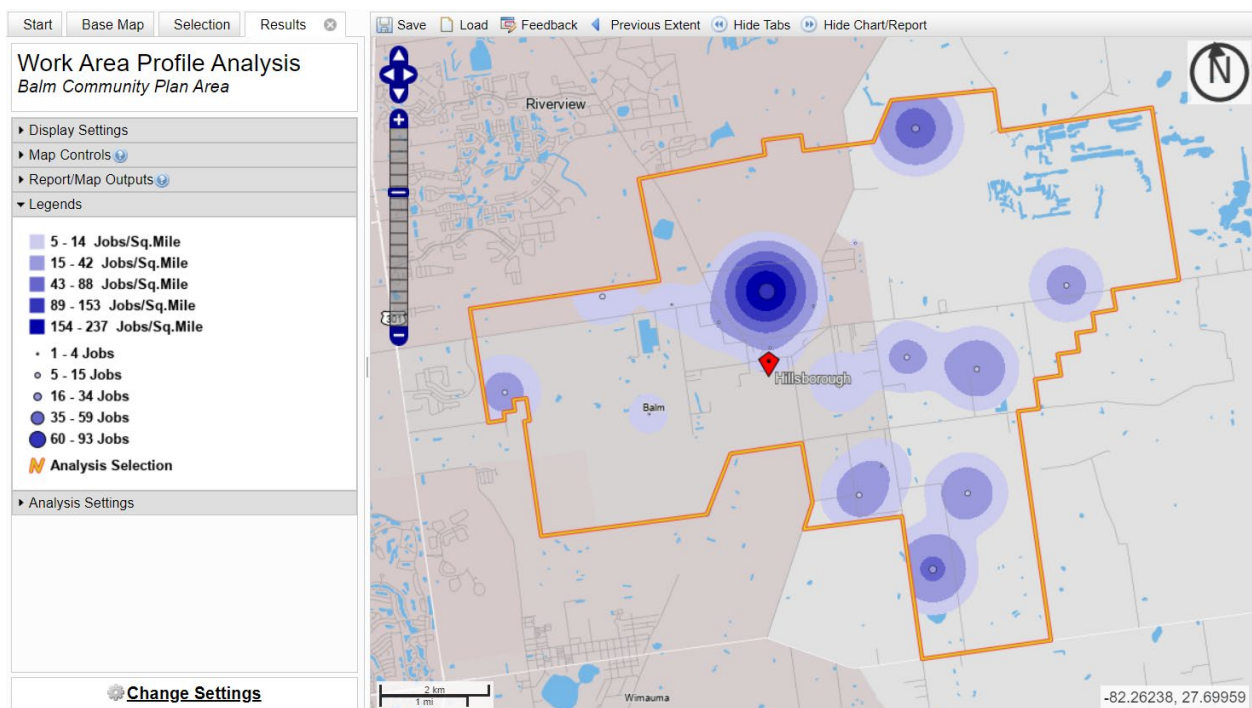
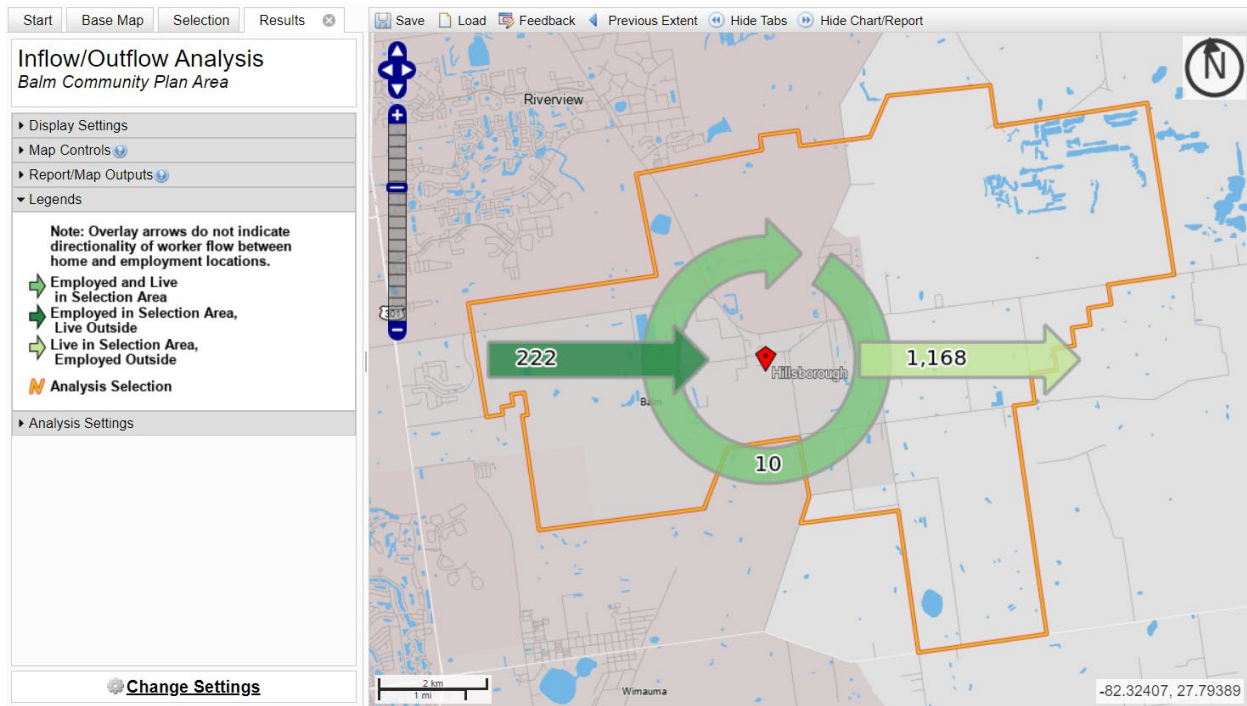


Figure 7: Inflow/Outflow of Daily Labor Force—Balm, 2017



- As illustrated in Figure 7, according to U.S. Census data (2017), 1,168 Balm residents in the labor force left daily to work elsewhere, while 222 residents living elsewhere arrived in Balm for work; and
- If Balm *maintains* its current “fair share” (0.08%) of all jobs in Hillsborough County in the future, this would translate into **only 47 new jobs by 2027** based on the state’s forecast.

**Table 14: Business Mix—Balm, 2018**

NAICS Category	Businesses		Employees	
	No.	% of Total	No.	% of Total
<b>Agriculture &amp; Mining</b>	<b>4</b>	9.3%	<b>29</b>	7.2%
<b>Construction</b>	<b>5</b>	11.6%	<b>21</b>	5.2%
<b>Manufacturing</b>	<b>2</b>	4.7%	<b>26</b>	6.5%
<b>Transportation &amp; Warehousing</b>	<b>2</b>	4.7%	<b>5</b>	1.2%
<b>Communications</b>	-	0.0%	<b>2</b>	0.5%
<b>Utilities</b>	-	0.0%	<b>5</b>	1.2%
<b>Wholesale &amp; Retail Trade</b>				
Wholesale	1		87	
Retail	7		99	
- Home Improvement	1		22	
- General Merchandise	-		36	
- Food Stores	1		15	
- Auto Dealers/Gas Stations	1		10	
- Apparel & Accessory Stores	-		-	
- Furniture/Home Furnishings	-		1	
- Eating & Drinking Places	1		7	
- Miscellaneous & Non-store Retail	1		6	
<b>Subtotal - All Retail:</b>	<b>8</b>	18.6%	<b>186</b>	46.2%
<b>Finance/Insurance/Real Estate</b>	<b>2</b>	4.7%	<b>10</b>	2.5%
<b>Services</b>				
- Hotel/Lodging	-		-	
- Automotive Services	1		4	
- Motion Pictures & Amusements	4		14	
- Health Services	-		1	
- Legal Services	-		1	
- Educational Institutions	1		27	
- Other Services	9		43	
<b>Subtotal - Services:</b>	<b>15</b>	34.9%	<b>90</b>	22.3%
<b>Government</b>	-	0.0%	<b>29</b>	7.2%
<b>Unclassified Establishments</b>	<b>5</b>	11.6%	-	0.0%
<b>TOTAL:</b>	<b>43</b>	<b>100.0%</b>	<b>403</b>	<b>100.0%</b>

<b>ANALYSIS:</b>	
2018 Employment	403
As Share of Hillsborough County	<b>0.1%</b>
2019 Population	3,082
Jobs/Population Ratio	<b>0.13</b>

Source: ESRI Business Analyst; InfoGroup, Inc.; Dun & Bradstreet, Inc.; WTL +a, March 2020.

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**Table 15: Employment Trends—Balm, 2006—2017**

Industry Sector	2006	2007	National Recession			2011	2012	2013	2014	2015	2016	2017	2017 % Dist.	Change: 2006-2017	
			2008	2009	2010									Amount	CAGR %
<b>Agriculture &amp; Mining</b>	48	677	691	601	553	625	277	197	119	117	91	95	40.9%	47	6.4%
<b>Construction</b>	103	93	66	42	45	8	10	7	4	12	11	25	10.8%	(78)	-12.1%
<b>Manufacturing</b>	-	-	-	1	-	-	-	-	-	-	-	-	0.0%	-	0.0%
<b>Transp &amp; Warehousing</b>	3	2	3	7	15	4	11	8	10	12	13	16	6.9%	13	16.4%
<b>Utilities</b>	-	-	-	-	-	-	-	-	-	-	-	-	0.0%	-	0.0%
<b>Trade</b>															
Wholesale	8	14	16	17	11	5	10	15	5	4	7	2	0.9%	(6)	-11.8%
Retail	-	-	-	2	2	-	-	-	2	9	2	1	0.4%	1	0.0%
<b>Information</b>	-	-	-	-	-	-	-	-	-	-	-	1	0.4%	1	0.0%
<b>Finance &amp; Insurance</b>	-	-	-	-	-	2	-	-	-	-	-	-	0.0%	-	0.0%
<b>Real Estate/Rental &amp; Leasing</b>	8	-	-	1	1	1	1	3	4	1	-	-	0.0%	(8)	-100.0%
<b>Services</b>															
Prof'l/Business Services	19	5	5	5	9	1	2	2	1	-	1	2	0.9%	(17)	-18.5%
Management of Companies	-	-	-	-	-	-	-	1	-	-	-	-	0.0%	-	0.0%
Administration/Waste Mgmt.	36	34	33	38	34	45	34	43	56	49	49	41	17.7%	5	1.2%
Educational Services	-	-	1	-	-	-	1	2	-	-	-	-	0.0%	-	0.0%
Health Care & Social Assistance	23	25	29	19	25	43	50	44	43	5	20	17	7.3%	(6)	-2.7%
Arts/Entertainment/Recreation	-	-	-	-	-	3	5	5	-	10	14	14	6.0%	14	100.0%
Accommodation & Food Services	-	1	-	-	-	1	-	-	-	-	-	1	0.4%	1	100.0%
Other Services	1	-	2	-	1	2	6	5	6	8	14	17	7.3%	16	29.4%
<b>Public Administration/Gov't</b>	4	-	2	-	-	1	1	-	-	-	-	-	0.0%	(4)	-100.0%
<b>Total (In 000s):</b>	<b>253</b>	<b>851</b>	<b>848</b>	<b>733</b>	<b>696</b>	<b>741</b>	<b>408</b>	<b>332</b>	<b>250</b>	<b>227</b>	<b>222</b>	<b>232</b>		<b>(21)</b>	<b>-0.8%</b>
<i>Annual Change:</i>	-	598	(3)	(115)	(37)	45	(333)	(76)	(82)	(23)	(5)	10			
<i>Job Loss (As % of All Jobs):</i>			-0.4%	-16%	-5%	6%	-82%	-23%	-33%	-10%	-2%	4%			
<b>Balm As % of County:</b>	<b>0.04%</b>	<b>0.1%</b>	<b>0.1%</b>	<b>0.1%</b>	<b>0.1%</b>	<b>0.1%</b>	<b>0.1%</b>	<b>0.1%</b>	<b>0.04%</b>	<b>0.03%</b>	<b>0.03%</b>	<b>0.03%</b>		<b>12-Year Avg:</b>	<b>0.08%</b>

Source: U.S. Census Bureau, On-the-Map; WTL +a, March 2020.

## Agricultural Economy



As noted in stakeholder comments in Section 2 of this report, as an economic driver, agricultural production and land is a consideration in terms of its relative cost and benefits to Hillsborough County, particularly as it relates to views of residential development.

According to a 2005 study prepared on behalf of the County’s Economic Development Department, Hillsborough County is one of the leading agricultural counties in Florida and the U.S. Although Hillsborough County contains one of the largest urban centers in the State of Florida, 34% of the County’s land area in 2005 was devoted to agricultural production. At that time, there were 2,969 farms encompassing 229,875 acres, the second most of any county in the state and 20th highest in the country, averaging 96 acres. In addition, the industry had an estimated annual sales of \$667.8 million, an annual economic impact of \$1.4 billion, and provided 20,122 jobs at the time of the study.

**Table 16: Community Tax Revenues & Expenses by Land Use, 2005**

Revenues	Taxes Generated		Costs for Services	
Residential	\$	1.00	\$	1.29
Commercial	\$	1.00	\$	0.36
Industrial	\$	1.00	\$	0.21
<b>Agricultural</b>	<b>\$</b>	<b>1.00</b>	<b>\$</b>	<b>0.25</b>
Vacant	\$	1.00	\$	0.05
Other	\$	1.00	\$	0.05

**Source: Hillsborough County Economic Development Department, 2005 study; WTL+a, March 2020.**

- As illustrated in Table 16, the 2005 study also estimated tax revenues generated by various land uses against the costs of municipal services. According to the findings of the impact report, for every **\$1 generated in tax revenues for agricultural land, the cost to provide services was \$0.25. In contrast, for every \$1 in taxes generated by residential development, the cost to provide public services was \$1.29.** Clearly the differential in these costs/benefits should be considered in future land use planning from a public cost perspective alone.

**Table 17: Agricultural Commodity Sales—Hillsborough County, 2017 Estimates**

Commodity Ranked by Sales	Annual Sales	% Total	No. of Acres	% of Total	Sales Per Acre
Strawberries	\$ 477,687,669	55%	11,367	5%	\$ 42,024
Vegetables	150,250,000	17%	12,020	5%	12,500
Ornamental Plants	125,000,000	14%	2,796	1%	44,707
Miscellaneous	42,630,000	5%	3,045	1%	14,000
Aquaculture	19,627,039	2%	733	0.3%	26,776
Beef Cattle/Pasture	13,828,250	2%	76,859	32%	180
Blueberries	13,390,000	2%	1,030	0.4%	13,000
Sod	6,700,000	1%	1,579	1%	4,243
Citrus	6,289,810	1%	5,585	2%	1,126
Peaches	3,037,500	0.4%	450	0.2%	6,750
Dairy	2,393,160	0.3%	200	0.1%	11,966
Hay	2,366,496	0.3%	5,479	2%	432
Forestry	1,600,000	0.2%	117,560	49%	14
Bees/Honey Production	225,090	0.0%	62	0.03%	3,630
Goats/Sheep	143,630	0.0%	593	0.2%	242
<b>Total:</b>	<b>\$ 865,168,644</b>	<b>100%</b>	<b>239,358</b>	<b>100%</b>	<b>\$ 3,615</b>

**Source: Hillsborough County Economic Development Department; WTL+a, May 2020.**

- As illustrated in Table 17, a 2017 estimate provided by the County’s Economic Development Department indicated roughly \$865.1 million in annual sales of agricultural commodities on 239,358 acres of land. Notably, while strawberry production generated 55% of annual sales, the commodity only occupies 5% of the County’s agricultural land;

- As illustrated in Table 18, a 2014 study estimated that fully 86% of the County’s agricultural lands were located outside of the Urban Service Area, with 14% located within the Urban Service Area;
- **The amount of Hillsborough County land in agricultural production has reportedly decreased over the last 15 years.** In 2005, there were 229,875 acres of land in Hillsborough County used for agriculture, out of a total land area of 840,000 acres (representing 27% of total land area in the County); and
- According to County Property Appraiser records, by 2016 agricultural land had been reduced to 215,000 acres, representing a decline of 15,000 acres (or 1.8% of total land area). **This net loss of 15,000 acres of agricultural land occurred over only 11 years.**

**Table 18: Agricultural Acres In/Out of Urban Service Area—Hillsborough County, 2014**

Commodity	Agricultural Acreage				Total Acres
	Out of Urban Service Area	% of Total	In Urban Service Area	% of Total	
Pasture	63,235.0	59%	12,214.4	71%	75,449.4
Vegetables and Row Crops	10,786.3	10%	1,348.1	8%	12,134.3
Strawberries	11,902.0	11%	130.4	1%	12,032.4
Citrus	8,600.9	8%	368.7	2%	8,969.6
Miscellaneous	5,702.9	5%	1,548.1	9%	7,251.0
Timber	3,789.1	4%	215.7	1%	4,004.7
Ornamental	2,304.2	2%	996.9	6%	3,301.0
Sod	1,039.3	1%	35.0	0%	1,074.4
Fish Farm	608.8	1%	233.0	1%	841.8
Poultry	3.8	0%	0.5	0%	4.3
<b>Total:</b>	<b>107,972.1</b>	<b>86%</b>	<b>17,090.7</b>	<b>14%</b>	<b>125,062.8</b>

**Source: Hillsborough County Economic Development Department; WTL+a, May 2020.**



# 4 Real Estate Market Conditions



WTL +a evaluated real estate market conditions in both the Wimauma and Balm Community Plan Areas and in other selected, competitive locations in Hillsborough County to understand how recent market trends, current economic conditions, and future growth affect opportunities for new growth and economic development in Wimauma Village and to

inform policy direction regarding future growth and development in the WVR-2 and RP-2 zoning districts.

This section of the report analyzes historic and current building inventory, occupancy and vacancy levels, annual absorption (leasing) activity, historic development trends, and other appropriate market indices for housing, workplace (office and light industrial) and supporting commercial (retail) uses based on available data. This includes Table 19 through Table 22 (data for dwelling units) and Table 23 through Table 30 (square feet and other metrics for office, industrial and retail uses).

## Housing

WTL+a analyzed a range of real estate metrics of the housing stock in both Balm and Wimauma. Key findings are summarized below:

### Hillsborough County

To document how population and household growth affects market potentials for new housing in Wimauma, WTL+a reviewed information on annual housing starts/residential building permits. This analysis also compares housing starts to household growth to understand whether the pace of one metric is consistent with (or exceeds) the other. Housing starts for the 12-year period between 2007 and 2018 are illustrated in Table 19.

### WTL +a

Real Estate & Economic Advisors  
Washington, DC—Cape Cod, MA  
301.502.4171 508.214.0915

**Table 19: Annual Housing Starts—Hillsborough County, 2007—2018**

Municipality	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	Change: 2007-2018			
													Total Starts	Annual Average	% of County	
<b>Single-family Detached</b>																
Plant City	167	114	80	24	69	86	109	142	120	125	137	132	1,305	109	2.3%	
Tampa	1,008	636	453	455	590	547	686	712	1,036	934	1,010	1,109	9,176	765	16.1%	
Temple Terrace	15	6	6	1	-	14	39	6	5	10	21	8	131	11	0.2%	
<b>Unincorporated County</b>	<b>3,282</b>	<b>2,356</b>	<b>1,939</b>	<b>2,423</b>	<b>2,416</b>	<b>3,412</b>	<b>3,964</b>	<b>3,551</b>	<b>4,508</b>	<b>5,239</b>	<b>6,085</b>	<b>7,314</b>	<b>46,489</b>	<b>3,874</b>	<b>81.4%</b>	
<b>SFD-Hillsborough County:</b>	<b>4,472</b>	<b>3,112</b>	<b>2,478</b>	<b>2,903</b>	<b>3,075</b>	<b>4,059</b>	<b>4,798</b>	<b>4,411</b>	<b>5,669</b>	<b>6,308</b>	<b>7,253</b>	<b>8,563</b>	<b>57,101</b>	<b>4,758</b>	<b>64%</b>	
% Change-Previous Year	0%	-30%	-20%	17%	6%	32%	18%	-8%	29%	11%	15%	18%				
<b>Multi-family</b>																
Plant City	-	68	6	3	48	-	2	-	130	4	-	-	261	22	0.8%	
Tampa	2,386	986	387	643	103	2,081	1,174	1,843	2,126	3,328	2,165	679	17,901	1,492	56.5%	
Temple Terrace	-	-	-	-	-	-	-	-	262	-	-	-	262	22	0.8%	
<b>Unincorporated County</b>	<b>576</b>	<b>2,036</b>	<b>920</b>	<b>401</b>	<b>954</b>	<b>1,091</b>	<b>904</b>	<b>1,236</b>	<b>1,306</b>	<b>1,022</b>	<b>2,149</b>	<b>655</b>	<b>13,250</b>	<b>1,104</b>	<b>41.8%</b>	
<b>MF-Hillsborough County:</b>	<b>2,962</b>	<b>3,090</b>	<b>1,313</b>	<b>1,047</b>	<b>1,105</b>	<b>3,172</b>	<b>2,080</b>	<b>3,079</b>	<b>3,824</b>	<b>4,354</b>	<b>4,314</b>	<b>1,334</b>	<b>31,674</b>	<b>2,640</b>	<b>36%</b>	
% Change-Previous Year	0%	4%	-58%	-20%	6%	187%	-34%	48%	24%	14%	-1%	-69%				

<http://socds.huduser.org/permits/>

Source: U.S. Census Bureau; U.S. Dept. of Housing & Urban Development; Hillsborough County; WTL+a, February 2020.

**Table 19 (Continued): Annual Housing Starts—Hillsborough County, 2007-2018**

Municipality	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	Change: 2007-2018			
													Total Starts	Annual Average	% of Total	
<b>All Jurisdictions</b>																
Plant City	167	182	86	27	117	86	111	142	250	129	137	132	1,566	130.50	1.8%	
Tampa	3,394	1,622	840	1,098	693	2,628	1,860	2,555	3,162	4,262	3,175	1,788	27,077	2,256	30.5%	
Temple Terrace	15	6	6	1	-	14	39	6	267	10	21	8	393	33	0.4%	
<b>Unincorporated County</b>	<b>3,858</b>	<b>4,392</b>	<b>2,859</b>	<b>2,824</b>	<b>3,370</b>	<b>4,503</b>	<b>4,868</b>	<b>4,787</b>	<b>5,814</b>	<b>6,261</b>	<b>8,234</b>	<b>7,969</b>	<b>59,739</b>	<b>4,978</b>	<b>67.3%</b>	
<b>TOTAL COUNTY:</b>	<b>7,434</b>	<b>6,202</b>	<b>3,791</b>	<b>3,950</b>	<b>4,180</b>	<b>7,231</b>	<b>6,878</b>	<b>7,490</b>	<b>9,493</b>	<b>10,662</b>	<b>11,567</b>	<b>9,897</b>	<b>88,775</b>	<b>7,398</b>	<b>100%</b>	
% Change-Previous Year	-	-17%	-39%	4%	6%	73%	-5%	9%	27%	12%	8%	-14%				

<http://socds.huduser.org/permits/>

Source: U.S. Census Bureau; U.S. Dept. of Housing & Urban Development; Hillsborough County; WTL+a, February 2020.

Key findings indicate that:

- Since 2007, housing starts across Hillsborough County resulted in delivery of 88,775 new housing units, producing a *sustained* annual pace of almost **7,400 units per year**. In terms of unit distribution, this includes 57,101 single-family units (64% of the total) and 31,674 multi-family units (36% of the total); and
- Consistent with significant population growth in unincorporated parts of Hillsborough County, there were more than 59,700 unit starts. In total, the unincorporated areas accounted for fully 81% of the County's single-family starts and 42% of the County's multi-family units during this period.

### Wimauma Community Plan Area

- As illustrated in Table 20, the Wimauma Community Plan Area contains a diverse mix of housing stock, with a total of 2,364 housing units comprised of:
  - Single-family detached (46%)
  - Mobile homes (39%)
  - Townhouses (3%), and
  - A mix of multi-family units (11%)
- In terms of tenure, 56% of Wimauma's housing stock is owner-occupied (this compares to 53.5% for the County as a whole. Notably, **ownership tenure in Wimauma has increased—from 47% in 2010**—driven primarily by new residential development on the outskirts of Wimauma;
- The average value of owner-occupied units is \$226,140; notably, median values are forecast to increase by 4.6% per year, to \$256,825 by 2024. **The rate of increase in housing values in Wimauma is expected to outpace that of the County (2.4% per year) over the next five years;**

**Increasing Homeownership in Wimauma with New Development:**

**From 47% in 2010 to 56% in 2017**

**Table 20: Housing Profile—Wimauma, 2010—2024**

	2010	2019	% Dist.	2024	% Dist.	Change: 2019-2024	
						No.	CAGR %
<b>Housing Tenure</b>							
<b>Owner-occupied</b>	851	1,337		1,576		239	3.34%
% of Total	47.2%	56.6%		59.2%			
<b>Renter-occupied</b>	682	798		854		56	1.37%
% of Total	37.8%	33.8%		32.1%			
<b>Unoccupied</b>	269	229		234		5	0.43%
% of Total	14.9%	9.7%		8.8%			
<b>Total Units:</b>	<b>1,802</b>	<b>2,364</b>		<b>2,664</b>		<b>300</b>	<b>2.42%</b>
<b>Change in Units:</b>		<b>562</b>					

<b>Owner-Occupied Value</b>							
\$0 - \$99,999		244	18%	193	12%	(51)	-4.6%
\$100,000 - \$199,999		411	31%	370	23%	(41)	-2.1%
\$200,000 - \$299,999		390	29%	594	38%	204	8.8%
\$300,000 - \$399,999		126	9%	204	13%	78	10.1%
\$400,000 - \$499,999		141	11%	175	11%	34	4.4%
\$500,000 - \$749,999		18	1%	27	2%	9	8.4%
\$750,000 - \$999,999		-	0%	-	0%	-	0.0%
\$1,000,000 - \$1,499,999		6	0.4%	12	1%	6	14.9%
\$1,500,000 - \$1,999,999		-	0%	-	0%	-	0.0%
\$2,000,000+		-	0%	-	0%	-	0.0%
<b>Median Value</b>		<b>\$ 205,078</b>		<b>\$ 256,733</b>			<b>4.6%</b>
<b>Average Value</b>		<b>\$ 226,141</b>		<b>\$ 256,825</b>			<b>2.6%</b>

<b>All Housing Units By Structure (2017 American Community Survey)</b>			
1 Unit, Detached	1,015	46.5%	
1 Unit, Attached	72	3.3%	
2 Units	15	0.7%	
3 or 4 Units	87	4.0%	
5 to 9 Units	93	4.3%	
10 to 19 Units	21	1.0%	
20 to 49 Units	-	0.0%	
50 or more Units	21	1.0%	
Mobile Home	855	39.1%	
Boat/RV/Other	6	0.3%	
<b>Total Units:</b>	<b>2,185</b>	<b>100%</b>	

<b>Unoccupied Housing Units By Status</b>			
Unoccupied-All Reasons	2010	2017 (ACS)	
Rented (Not Occupied)	2		
For Sale Only	26		
Sold (Not Occupied)	7		
Seasonal Use	110		6.1%
For Migrant Workers	8		
<b>Subtotal:</b>	<b>153</b>		

<b>TRUE VACANCIES</b>			
Other Vacant	31		
Vacant, For Rent	62		
<b>Subtotal:</b>	<b>93</b>	<b>110</b>	
<b>True Vacancy Rate</b>	<b>5.2%</b>	<b>4.6%</b>	

**Total Unoccupied Units:**      **246**      **290**      37.8%

<https://factfinder.census.gov/faces/nav/jsf/pages/index.xhtml>

Source: ESRI Business Analyst; American Community Survey; WTL +a, January 2020.

- More specific analysis of Wimauma’s unoccupied housing stock indicates that units are unoccupied for various reasons. By Census definition, unoccupied units include: rented but not occupied; for sale; sold but not occupied; for seasonal use; and for migrant workers. As a result, this does not accurately reflect actual *vacant* units that can be occupied;
- U.S. Census data indicate that 269 units (14.9%) were unoccupied as of the 2010 Census, as the economic recovery from the 2007—2009 recession ended, and recovery gained momentum. As a result, the number of vacant units in many housing markets has *declined* with an improving economy. In Wimauma, **the number of unoccupied units decreased between 2010 and 2019**—from 269 units in 2010 to 229 units in 2019 (9.7%);
- **The “truly vacant” rate (i.e., units actually available for occupancy) was 5.2% in 2010 and decreased to 4.6% in 2017.** That is, some portion of the 110 existing “truly vacant” units could accommodate demand generated by future population and household growth in Wimauma;



Given the enormity of new residential development in South County, Hillsborough County compiled data on housing starts in the RP-2 zoning district. As illustrated in Table 21 and Figure 8, key findings indicate that:

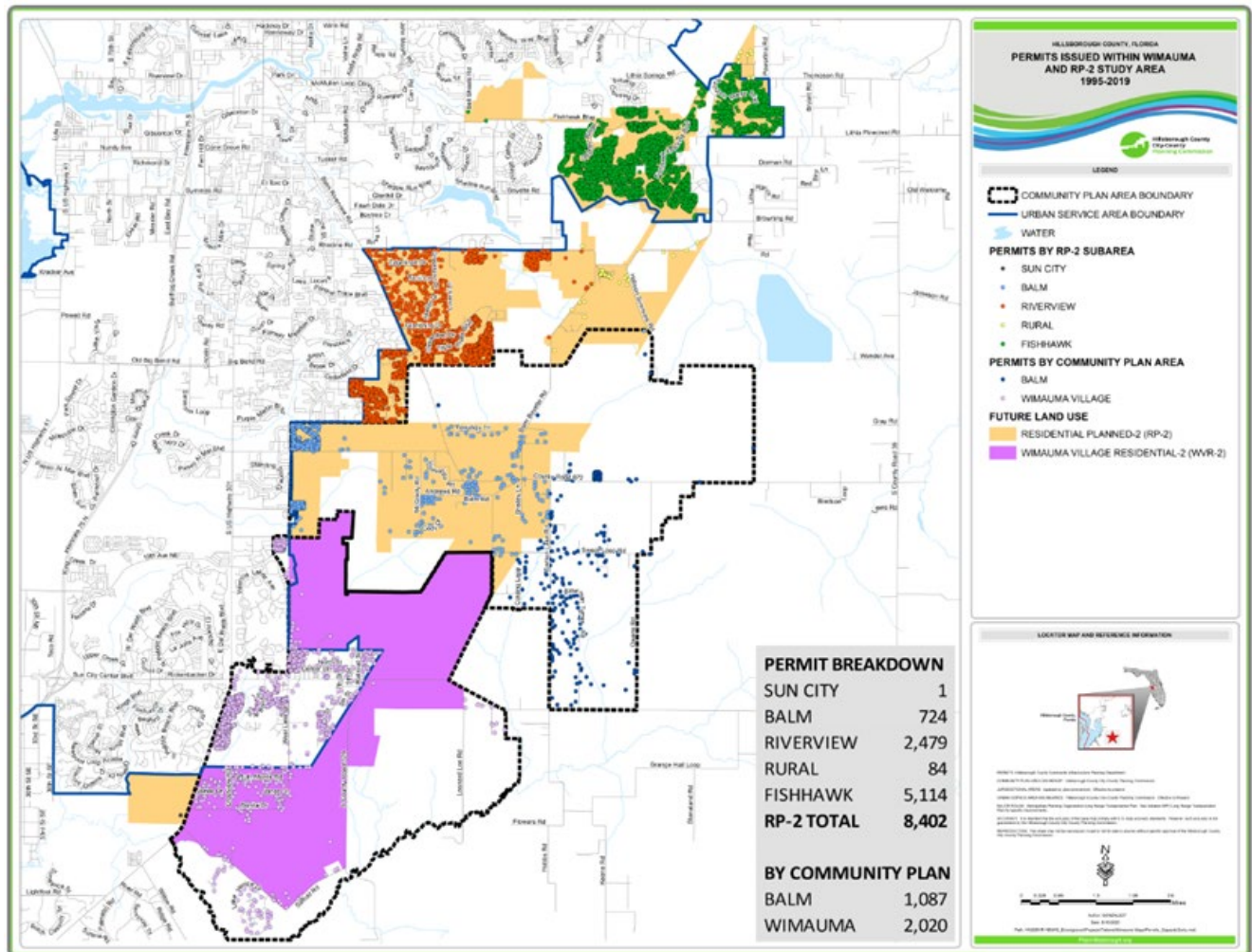
**Table 21: Annual Housing Starts—RP-2 & WVR-2 Zoning Districts, 2000—2019**

Location	2000-2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Unknown Dates	Change: 2000-2019		
																Total Starts	Annual Average	% of District
<b>RP-2</b>																		
Balm CP (Inc RP-2)	184	7	-	7	5	6	3	9	16	16	22	202	249	170	12	908	45	11.9%
Fishhawk	3,253	81	144	152	201	165	177	139	70	30	47	37	28	1	36	4,561	228	59.7%
Riverview	235	16	5	6	13	7	52	136	41	58	80	210	478	754	15	2,106	105	27.6%
Rural	9	-	1	-	-	1	-	1	-	1	1	-	1	49	2	66	3	0.9%
Sun City	-	-	-	1	-	-	-	-	-	-	-	-	-	-	-	1	0	0.0%
<b>Subtotal-RP-2:</b>	<b>3,681</b>	<b>104</b>	<b>150</b>	<b>166</b>	<b>219</b>	<b>179</b>	<b>232</b>	<b>285</b>	<b>127</b>	<b>105</b>	<b>150</b>	<b>449</b>	<b>756</b>	<b>974</b>	<b>65</b>	<b>7,642</b>	<b>382</b>	<b>82.7%</b>
<b>WVR-2</b>																		
Wimauma CP	236	21	60	50	29	29	18	15	18	138	127	122	364	339	37	1,603	80	17.3%
<b>TOTAL:</b>	<b>3,917</b>	<b>125</b>	<b>210</b>	<b>216</b>	<b>248</b>	<b>208</b>	<b>250</b>	<b>300</b>	<b>145</b>	<b>243</b>	<b>277</b>	<b>571</b>	<b>1,120</b>	<b>1,313</b>	<b>102</b>	<b>9,245</b>	<b>462</b>	<b>100%</b>
% Change-Previous Year		-	68%	3%	15%	-16%	20%	20%	-52%	68%	14%	106%	96%	17%				
As % of County	4%	2%	3%	6%	6%	5%	3%	4%	2%	3%	3%	5%	11%	1%		5.1%		

(1) Excludes replacement mobile home units, any commercial activity and permits issued for "Labor Camp"(s).

Source: Hillsborough County; WTL+a, updated June 2020.

Figure 8: Total Housing Starts—RP-2 Zoning District, 1995—2019



- In the entire RP-2 zoning district in South County, between 2000 and 2019 **7,642 new housing units were built**, equating to **382 starts per year**. Within specific locations of RP-2, Fishhawk captured 60% of the starts (4,561 units), Riverview captured almost 28% of the starts (2,106 units), and Balm captured 12% of the starts (908 units, with 635 units in RP-2);
- In the WVR-2 zoning district in Wimauma, **1,603 new housing units were built**, reflecting average annual housing starts of **80 units per year** over this 20-year period. Between 2017 and 2019, however, the pace of new housing construction in WVR-2 increased—with 825 new unit starts, equating to an average of **275 units per year over the past three years**. While WVR-2 accounted for 17.3% of all starts in these two zoning districts since 2000, it accounted for more than 27% of all housing starts between 2017 and 2019; and





**1,603 New Units Built in WVR-2 since 2000;**

**825 Units (275 Units/Year) Built Just Since 2017**

### Balm Community Plan Area

- As illustrated in Table 22, the Balm Community Plan Area contains 865 housing units;
- In terms of tenure, fully 75% are owner-occupied units. Ownership tenure has *increased* slightly—from 73% in 2010;
- The average value of owner-occupied units in Balm is \$313,000; both median and average values are forecast to increase by 1.9% per year, to an average value of \$343,450 by 2024;
- Fully 76% of Balm’s housing stock is comprised of single-family units, only 2% are multi-family units, and 21% are mobile homes;
- **The “truly vacant” rate (i.e., units actually available for occupancy) was 5.5% in 2010 and decreased to 4.3% in 2017.** That is, some portion of the 83 existing “truly vacant” units could accommodate demand generated by future population and household growth in Balm; and
- In the Balm CP, **908 new housing units were built**, reflecting average annual housing starts of **45 units per year** over this 20-year period. Between 2017 and 2019, however, the pace of new housing construction in Balm also increased—with 621 new unit starts, equating to an average of **207 units per year over the past three years.** Within Balm’s CP area, there were 635 unit starts in the RP-2 zoning district, accounting for 70% of all starts in the Balm CP over the past 20 years.

**Table 22: Housing Profile—Balm, 2010—2024**

	2010	2019	% Dist.	2024	% Dist.	Change: 2019-2024	
						No.	CAGR %
<b>Housing Tenure</b>							
<b>Owner-occupied</b>	531	647		712		65	1.93%
% of Total	72.6%	74.8%		76.0%			
<b>Renter-occupied</b>	120	142		152		10	1.37%
% of Total	16.4%	16.4%		16.2%			
<b>Unoccupied</b>	80	76		73		(3)	-0.80%
% of Total	10.9%	8.8%		7.8%			
<b>Total Units:</b>	<b>731</b>	<b>865</b>		<b>937</b>		<b>72</b>	<b>1.61%</b>
<b>Change in Units:</b>		<b>134</b>					

<b>Owner-Occupied Value</b>							
\$0 - \$99,999		23	4%	10	1%	(13)	-15.3%
\$100,000 - \$199,999		118	18%	81	11%	(37)	-7.2%
\$200,000 - \$299,999		186	29%	200	28%	14	1.5%
\$300,000 - \$399,999		185	29%	236	33%	51	5.0%
\$400,000 - \$499,999		86	13%	119	17%	33	6.7%
\$500,000 - \$749,999		43	7%	61	9%	18	7.2%
\$750,000 - \$999,999		5	1%	7	1%	2	0.0%
\$1,000,000 - \$1,499,999		-	0%	-	0%	-	0.0%
\$1,500,000 - \$1,999,999		-	0%	-	0%	-	0.0%
\$2,000,000+		-	0%	-	0%	-	0.0%
<b>Median Value</b>		<b>\$ 298,039</b>		<b>\$ 327,966</b>			<b>1.9%</b>
<b>Average Value</b>		<b>\$ 313,042</b>		<b>\$ 343,452</b>			<b>1.9%</b>

<b>All Housing Units By Structure (2017 American Community Survey)</b>			
1 Unit, Detached	735	71.9%	
1 Unit, Attached	45	4.4%	
2 Units	-	0.0%	
3 or 4 Units	10	1.0%	
5 to 9 Units	13	1.3%	
10 to 19 Units	-	0.0%	
20 to 49 Units	-	0.0%	
50 or more Units	-	0.0%	
Mobile Home	210	20.5%	
Boat/RV/Other	9	0.9%	
<b>Total Units:</b>	<b>1,022</b>	<b>100%</b>	

<b>Unoccupied Housing Units By Status</b>			
<b>Unoccupied-All Reasons</b>	<b>2010</b>	<b>2017 (ACS)</b>	
Rented (Not Occupied)	-		
For Sale Only	22		
Sold (Not Occupied)	3		
Seasonal Use	24	3.3%	
For Migrant Workers	1		
<b>Subtotal:</b>	<b>50</b>		

<b>TRUE VACANCIES</b>			
Other Vacant	25		
Vacant, For Rent	15		
<b>Subtotal:</b>	<b>40</b>	<b>37</b>	
<b>True Vacancy Rate</b>	<b>5.5%</b>	<b>4.3%</b>	

**Total Unoccupied Units:**      **90**      **83**      44.4%

<https://factfinder.census.gov/faces/nav/jsf/pages/index.xhtml>

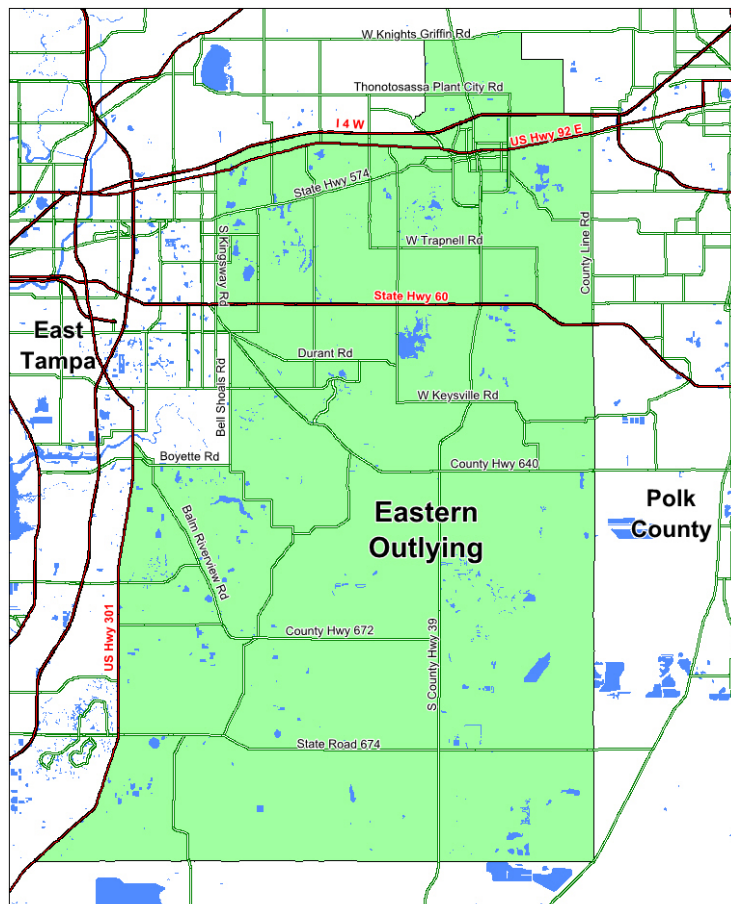
Source: ESRI Business Analyst; American Community Survey; WTL +a, March 2020.

## Workplace—Office

WTL+a evaluated real estate market conditions across “workplace” (such as office and light industrial) and supporting uses (such as retail). This data—square feet of inventory, construction deliveries, vacancies, rents, net absorption (leasing activity)—is critical to understanding the overall health of the study area’s real estate market, and directly informs development potentials for workplace uses in Wimauma, particularly in the Office/Light Industrial focus area. Key findings are highlighted below and illustrated in Table 23 and Table 24.

- As illustrated in Figure 9, according to CoStar, Inc. (a national commercial real estate database), both Wimauma and Balm are located in the “Eastern Outlying” office (and retail) submarket of Hillsborough County. This expansive submarket encompasses the entire southeastern portion of the County generally east of U.S. Route 301—from Plant City south to the Manatee County line;

**Figure 9: Eastern Outlying Submarket—Office & Retail**



**Table 23: Office Profile—Eastern Outlying Submarket, 2006—2019**

	2006	2007	National Recession & Recovery				2012	2013	2014	2015	2016	2017	2018	2019	Q1/ 2020	Change: 2006-2019		
			2008	2009	2010	2011										Total	Ann'l Avg.	% CAGR
<b>Office</b>																		
Inventory	1,500,482	1,761,467	1,840,316	1,911,383	2,036,159	2,036,159	2,048,659	2,059,037	2,059,037	2,073,136	2,087,136	2,107,862	2,114,612	2,250,603	2,255,671	750,121		
No. of Buildings/Centers	272	318	332	337	339	339	341	342	342	345	348	352	354	359	360			
Vacant Stock	125,477	235,291	282,804	316,344	273,795	308,404	377,970	317,524	225,047	198,625	181,731	183,871	187,581	162,396	121,985	36,919		
Vacancy Rate	8.4%	13.4%	15.4%	16.6%	13.4%	15.1%	18.4%	15.4%	10.9%	9.6%	8.7%	8.7%	8.9%	7.2%	5.4%			-1.1%
<b>Net Absorption:</b>	<b>142,468</b>	<b>151,171</b>	<b>31,336</b>	<b>37,527</b>	<b>167,325</b>	<b>(34,609)</b>	<b>(57,066)</b>	<b>70,824</b>	<b>92,477</b>	<b>40,521</b>	<b>30,894</b>	<b>18,586</b>	<b>3,040</b>	<b>161,176</b>	<b>45,479</b>	<b>855,670</b>	<b>61,119</b>	
<i>Past 5 Years</i>																<b>254,217</b>	<b>50,843</b>	
Construction Deliveries	135,298	262,265	78,849	78,693	124,776	-	12,500	12,082	-	14,099	14,000	20,726	6,750	135,991	5,068	896,029		
Gross Rent/SF	\$ 17.68	\$ 19.06	\$ 20.67	\$ 19.30	\$ 18.42	\$ 17.71	\$ 16.54	\$ 16.84	\$ 17.18	\$ 17.46	\$ 17.98	\$ 18.65	\$ 18.75	\$ 19.50	\$ 20.89			0.8%
Average Annual % Change	-	7.8%	8.5%	-6.6%	-4.6%	-3.9%	-6.6%	1.8%	2.0%	1.6%	3.0%	3.7%	0.5%	4.0%	11.4%			

Source: CoStar, Inc.; Hillsborough County Economic Development; WTL+a, March 2020.

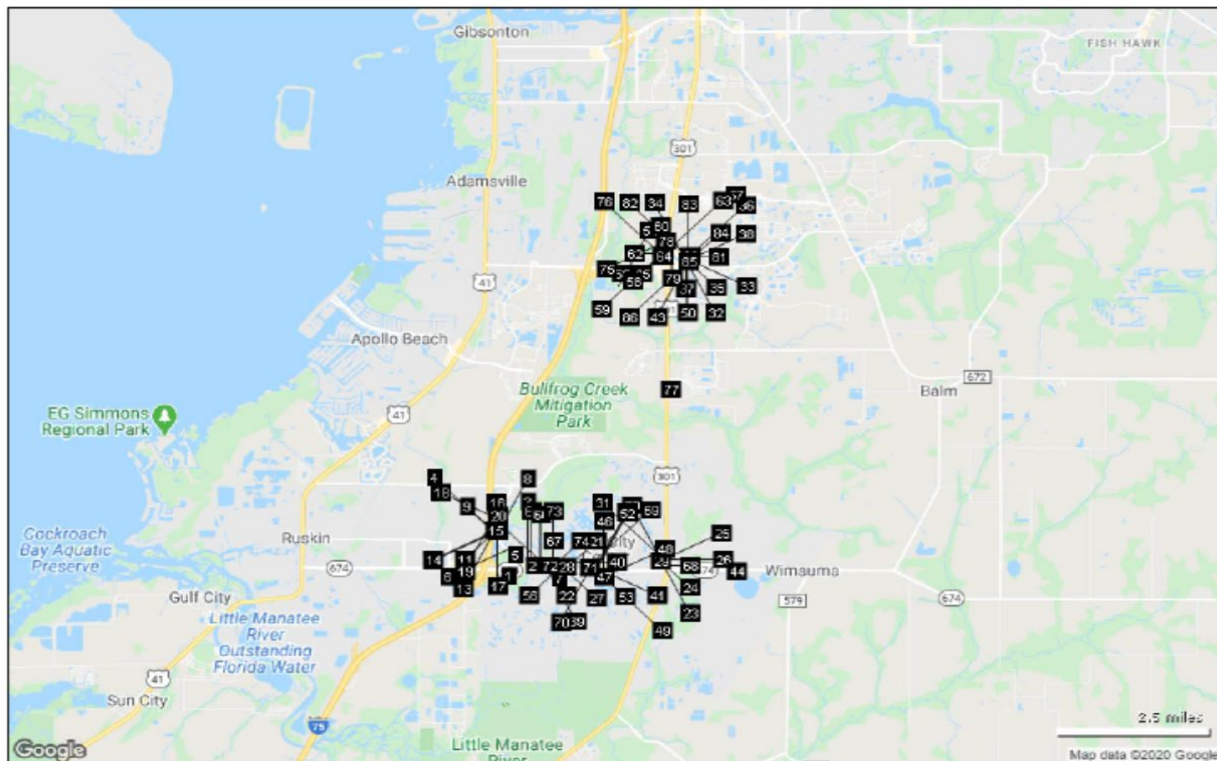


As illustrated in Table 23, there are 2.25 million sq. ft. of office space in the Eastern Outlying submarket. Vacancies, which peaked at 16.6% in 2009, declined to 7.2% in 2019 (and 5.4% in the first quarter of 2020). Net absorption has averaged 61,100 sq. ft. per year, with positive absorption in 12 of the past 14 years.

### Wimauma & Balm

As illustrated in Table 24, within the Eastern Outlying submarket, data from CoStar, Inc. indicate **533,400 sq. ft. of office space in 80 buildings surrounding Balm and Wimauma**. The area’s office inventory comprises approximately 25% of the larger Eastern Outlying submarket, and it has remained between 23% and 25% over the past 14 years;

Figure 10: Area Office Properties



**Table 24: Office Profile—Wimauma & Balm, 2006—2019**

	2006	2007	National Recession & Recovery				2012	2013	2014	2015	2016	2017	2018	2019	Q1/ 2020	Change: 2006-2019		
			2008	2009	2010	2011										Total	Ann'l Avg.	% CAGR
<b>Office</b>																		
Inventory	338,944	435,230	481,754	496,256	496,256	496,256	496,256	496,256	502,256	505,756	508,756	527,902	527,902	533,402	570,902	<b>194,458</b>		
As % of Eastern Outlying	23%	25%	26%	26%	24%	24%	24%	24%	24%	24%	24%	25%	25%	24%	25%			
No. of Buildings/Centers	41	58	69	72	72	72	72	72	73	74	76	79	79	80	81			
Vacant Stock	11,100	68,880	59,920	82,470	76,250	79,400	96,343	72,805	54,707	27,650	15,694	32,639	25,947	30,765	38,509	<b>19,665</b>		
Vacancy Rate	3.3%	15.8%	12.4%	16.6%	15.4%	16.0%	19.4%	14.7%	10.9%	5.5%	3.1%	6.2%	4.9%	5.8%	6.7%			<b>4.4%</b>
<b>Net Absorption:</b>	<b>6,000</b>	<b>38,506</b>	<b>55,484</b>	<b>(8,048)</b>	<b>6,220</b>	<b>(3,150)</b>	<b>(16,943)</b>	<b>23,538</b>	<b>24,098</b>	<b>30,557</b>	<b>14,956</b>	<b>2,201</b>	<b>6,692</b>	<b>682</b>	<b>29,756</b>	<b>180,793</b>	<b>12,914</b>	
<b>Past 5 Years</b>																<b>55,088</b>	<b>11,018</b>	
Construction Deliveries	8,000	96,286	46,524	14,502	-	-	-	-	6,000	3,500	3,000	19,146	-	5,500	37,500	<b>202,458</b>		
Gross Rent/SF	\$ 24.93	\$ 23.71	\$ 26.73	\$ 25.50	\$ 22.39	\$ 21.51	\$ 20.31	\$ 18.69	\$ 19.33	\$ 18.54	\$ 18.54	\$ 22.47	\$ 22.99	\$ 26.24	\$ 27.89			<b>0.4%</b>
Average Annual % Change	-	-4.9%	12.8%	-4.6%	-12.2%	-3.9%	-5.6%	-8.0%	3.5%	-4.1%	0.0%	21.2%	2.3%	14.1%	21.3%			

Source: CoStar, Inc.; Hillsborough County Economic Development; WTL+a, March 2020.

- These office buildings are clustered in Sun City Center and the Big Bend Road areas. With an average building size of only 6,700 sq. ft., this is a “garden” office market oriented primarily to professional and business services (medical, accounting, legal, etc.), with demand generated by “rooftop” growth;
- Vacancies have declined—from a peak of 19.4% in 2012 (notably, during recovery from the recession)—to 5.8% in 2019. Vacancies ticked up to 6.7% during the first quarter of 2020;
- More than 202,400 sq. ft. of new office space has been built in this area since 2006, with clusters of deliveries between 2006—2009 and 2014—2017.



- Office rents have fluctuated—from \$24.93 per sq. ft. in 2006 to \$26.24 per sq. ft. in 2019. Notably, year-over-year declines occurred in seven of the past 14 years;
- **Annual net office absorption has averaged only 12,900 sq. ft. per year** in the 14-year period between 2006 and 2019, but declined slightly to 11,000 sq. ft. per year over the past five years; and
- In summary, the office market surrounding Wimauma and Balm would be considered a tertiary market comprised of smaller “garden” office buildings oriented to professional services such as medical and legal. Demand is generated primarily by nearby “rooftop” growth. Net annual absorption is very limited.

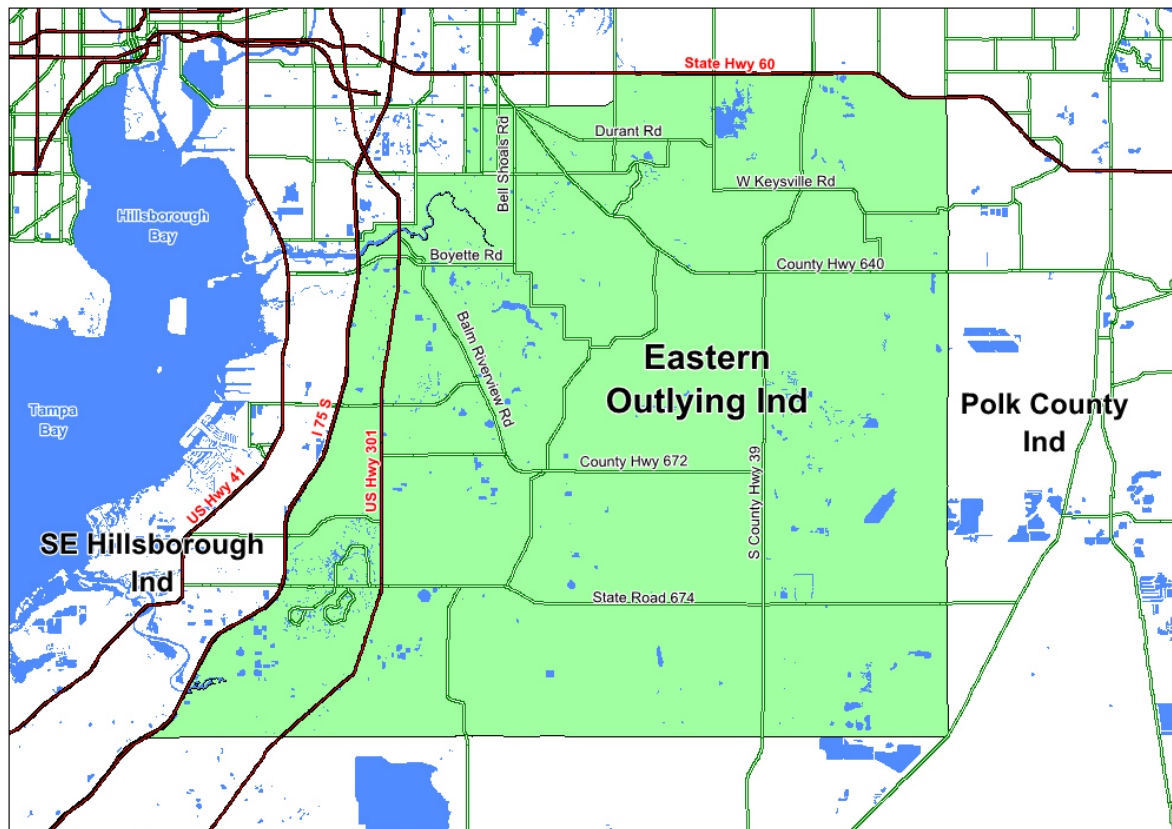
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## Workplace—General Industrial

- As illustrated in Figure 11, according to CoStar, Inc., both Wimauma and Balm are located in the “Eastern Outlying” industrial submarket of Hillsborough County. As defined by CoStar, the submarket’s boundaries are different than office and retail (it is not known why), encompassing the southeastern portion of the County east of I-75 and south of State Road 60 in Brandon to the Manatee County line. As illustrated in Table 25, there are over 12.6 million sq. ft. of industrial space in the Eastern Outlying submarket; and
- Vacancies in the Eastern Outlying industrial submarket, which peaked at 10.3% in 2009, declined quickly to 4.6% by 2011. Vacancy rates remained below 5% through 2018 when the vacancy rate increased to 6.3%. The real estate industry considers vacancy rates of 5% or less to be “stabilized” operations. In 2019, the industrial vacancy rate increased again, to 10.1%, even with positive net absorption. This was due to the construction of 1,925,000 sq. ft. of new industrial space between 2014 and 2019; and

Figure 11: Eastern Outlying Submarket—Industrial





**Table 25: Industrial Profile—Eastern Outlying Submarket, 2006—2019**

	2006	2007	National Recession & Recovery				2012	2013	2014	2015	2016	2017	2018	2019	Q1/ 2020	Change: 2006-2019		
			2008	2009	2010	2011										Total	Ann'l Avg.	% CAGR
<b>Industrial</b>																		
Inventory	10,701,258	10,737,853	10,741,027	10,741,027	10,741,027	10,726,777	10,652,960	10,652,960	10,733,560	10,833,560	11,093,560	11,093,560	11,664,619	12,649,021	12,649,021	1,947,763		
No. of Buildings/Centers	233	237	238	238	238	237	231	231	232	233	235	235	238	242	242			
Vacant Stock	219,598	300,082	614,288	1,104,005	700,074	490,266	425,925	433,780	473,934	413,755	447,327	362,401	730,399	1,279,499	1,158,428	1,059,901		
Vacancy Rate	2.1%	2.8%	5.7%	10.3%	6.5%	4.6%	4.0%	4.1%	4.4%	3.8%	4.0%	3.3%	6.3%	10.1%	9.2%			13.1%
<b>Net Absorption:</b>	<b>35,177</b>	<b>(43,889)</b>	<b>(311,032)</b>	<b>(489,717)</b>	<b>403,931</b>	<b>195,558</b>	<b>(9,476)</b>	<b>(7,855)</b>	<b>40,446</b>	<b>160,179</b>	<b>226,428</b>	<b>84,926</b>	<b>203,061</b>	<b>435,302</b>	<b>121,071</b>	<b>923,039</b>	<b>65,931</b>	
<b>Past 5 Years</b>																<b>1,109,896</b>	<b>221,979</b>	
Construction Deliveries	26,384	36,595	3,174	-	-	-	-	-	80,600	100,000	260,000	-	581,052	984,402	-	2,072,207		
Gross Rent/SF	\$ 3.76	\$ 4.74	\$ 5.69	\$ 5.00	\$ 4.57	\$ 3.97	\$ 4.04	\$ 4.42	\$ 4.82	\$ 4.94	\$ 4.61	\$ 5.49	\$ 5.15	\$ 4.90	\$ 5.18			2.1%
Average Annual % Change	-	26.1%	20.1%	-12.1%	-8.7%	-13.2%	2.0%	9.3%	9.2%	2.4%	-6.7%	19.0%	-6.1%	-4.9%	0.5%			

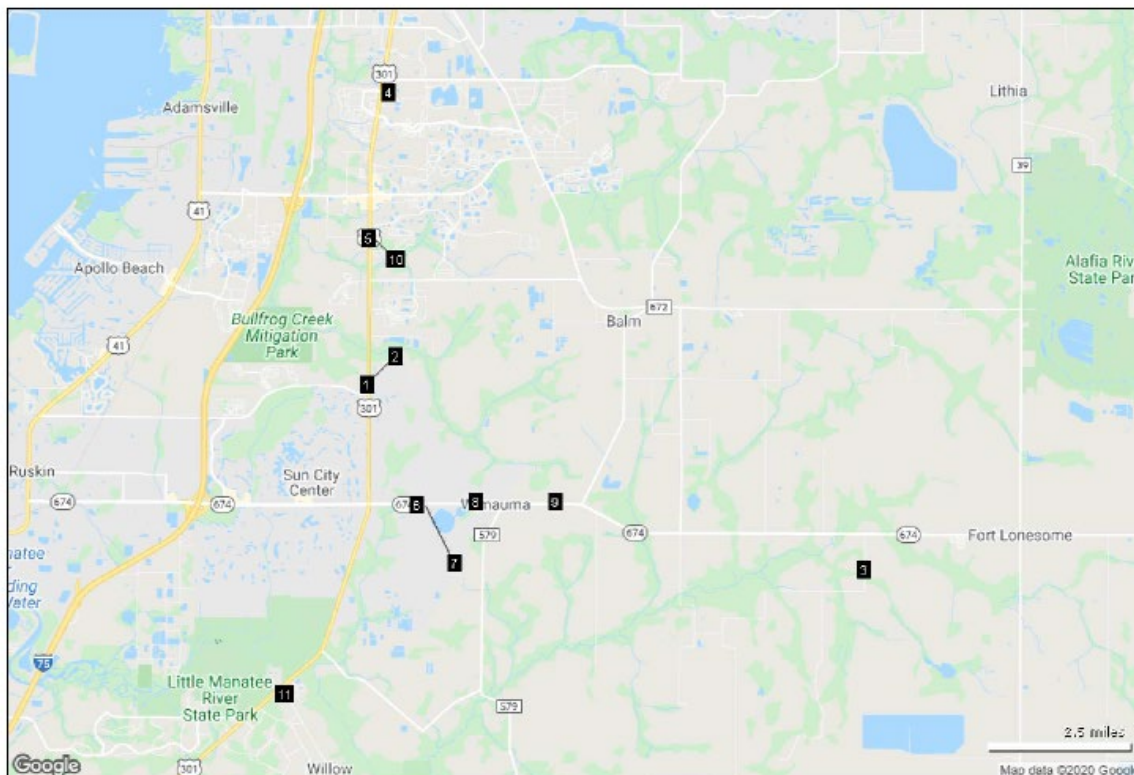
Source: CoStar, Inc.; Hillsborough County Economic Development; WTL+a, March 2020.

- **Annual net absorption averaged 65,930 sq. ft. per year**, with positive absorption in nine of the past 14 years. Notably, net leasing activity over the past five years was significantly greater—with nearly 222,000 sq. ft. of annual net absorption between 2014 and 2019.

**Wimauma & Balm**

- As illustrated in Table 26, CoStar data indicate only 106,000 sq. ft. of industrial space in **11 buildings in or adjacent to Balm and Wimauma**. These industrial properties are in scattered locations; examples include 6712 State Road 674 (built in 1976) and 10828 Bill Tucker Road (built in 1983). Primary tenancies are owner-users;
- At year-end 2019, **there was no reported vacant space among these 11 industrial properties**. In fact, the vacancy rate has been **0% for seven years (2012—2019)**, suggesting pent-up demand for new industrial space may exist in the Wimauma and Balm areas. However, vacancies ticked up slightly, to 3.5%, during the first quarter of 2020;

**Figure 12: Area Industrial Properties**



- While 2.07 million sq. ft. of new industrial space has been built in the larger Eastern Outlying submarket since 2006, **no new industrial space was delivered in Wimauma or Balm** during this period; and
- With such limited inventory and low/zero vacancy rates, there was **negligible net absorption in the industrial buildings in Wimauma/Balm between 2006 and 2019.**

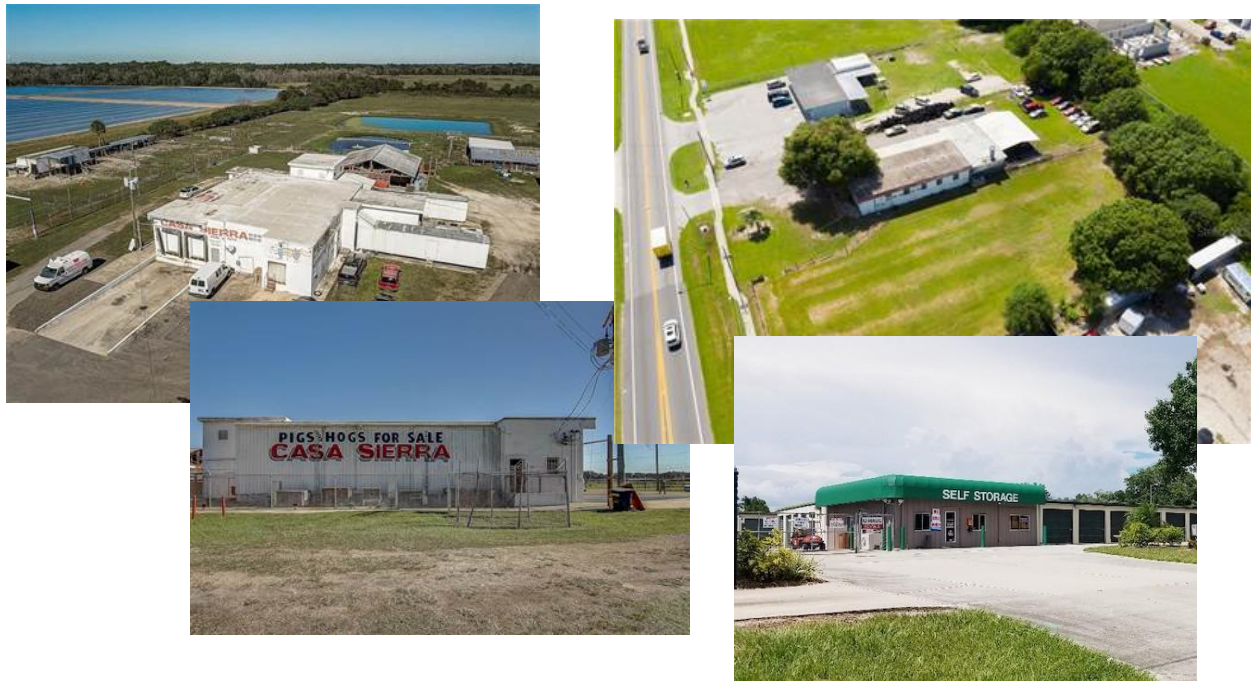


Table 26: Industrial Buildings—Wimauma & Balm (Partial Listing per CoStar, Inc.)

Property Address	Property/Tenant Name	Year Built	Building Area (SF)
<b>Industrial &amp; Flex</b>			
22025 Grange Hall Loop	Bio solids Mgmt LLC	1970	-
5201 State Road 674	Turf Keepers	1954	-
6708-6712 State Road 674	Casa Sierra	1976	7,357
3119 Willow Rd	Warehouse	1975	-
5624 State Road 674		1960	1,465
5119 State Route 674	Sun City Ctr Auto Body	1978	4,786

Source: CoStar, Inc.; WTL+a, March 2020.

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**Table 27: Industrial Profile—Wimauma & Balm, 2006—2019**

	2006	2007	National Recession & Recovery				2012	2013	2014	2015	2016	2017	2018	2019	Q1/ 2020	Change: 2006-2019		
			2008	2009	2010	2011										Total	Ann'l Avg.	% CAGR
<b>Industrial</b>																		
Inventory	106,006	106,006	106,006	106,006	106,006	106,006	106,006	106,006	106,006	106,006	106,006	106,006	106,006	106,006	106,006	-		
As % of Eastern Outlying	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	0.9%	0.8%	0.8%			
No. of Buildings/Centers	11	11	11	11	11	11	11	11	11	11	11	11	11	11	11			
Vacant Stock	-	-	18,800	18,800	21,000	-	2,791	-	-	-	-	-	-	-	3,750	-		
Vacancy Rate	0.0%	0.0%	17.7%	17.7%	19.8%	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.5%			N/A
<b>Net Absorption:</b>	<b>2,257</b>	<b>-</b>	<b>(18,800)</b>	<b>-</b>	<b>(2,200)</b>	<b>21,000</b>	<b>(2,791)</b>	<b>2,791</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>(3,750)</b>	<b>2,257</b>	<b>161</b>	
<b>Past 5 Years</b>																		
Construction Deliveries	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-		
Gross Rent/SF	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Average Annual % Change																		N/A

Source: CoStar, Inc.; Hillsborough County Economic Development; WTL+a, March 2020.

## Retail

- As illustrated previously in Figure 9, both Wimauma and Balm are located in CoStar’s “Eastern Outlying” retail submarket of Hillsborough County. Similar to office, this submarket encompasses the entire southeastern portion of the County generally east of I-75 and south of I-4 in Plant City to the Manatee County line;
- As illustrated in Table 28, there are 8.04 million sq. ft. of retail space in the Eastern Outlying submarket, including a significant cluster in Brandon surrounding the Westfield Mall. Retail vacancies in the submarket peaked at 9.4% during the national recession in 2009, gradually declined to stabilized levels (below 5% vacancy) by 2015. Since 2015, retail vacancies have been at 4% or less; in effect, the Eastern Outlying retail market is at full occupancy;
- Reflecting the overall health of retail, more than 1.87 million sq. ft. of new retail space was built between 2006 and 2019. In fact, new retail space has been delivered to the Eastern Outlying submarket each year of the past 14 years; and
- Consistent with a very strong retail market, **annual net absorption averaged 128,300 sq. ft. per year**, with positive absorption in 11 of the past 14 years. Notably, net leasing activity over the past five years strengthened to nearly 144,600 sq. ft. per year between 2014 and 2019.



**Table 28: Retail Profile—Eastern Outlying Submarket, 2006—2019**

	2006	2007	National Recession & Recovery				2012	2013	2014	2015	2016	2017	2018	2019	Q1/ 2020	Change: 2006-2019		
			2008	2009	2010	2011										Total	Ann'l Avg.	% CAGR
<b>Retail</b>																		
Inventory	6,619,638	7,102,264	7,218,551	7,429,176	7,429,917	7,440,597	7,438,403	7,471,730	7,489,685	7,510,956	7,729,727	7,803,282	7,874,284	8,049,575	8,067,552	1,429,937		
No. of Buildings/Centers	586	612	626	636	638	638	640	645	648	654	656	667	676	687	691			
Vacant Stock	192,209	280,299	437,048	701,693	658,573	635,614	684,520	527,434	404,459	314,033	300,894	280,063	233,755	239,868	194,617	47,659		
Vacancy Rate	2.9%	3.9%	6.1%	9.4%	8.9%	8.5%	9.2%	7.1%	5.4%	4.2%	3.9%	3.6%	3.0%	3.0%	2.4%			0.2%
<b>Net Absorption:</b>	<b>401,053</b>	<b>404,223</b>	<b>(38,942)</b>	<b>(54,020)</b>	<b>43,861</b>	<b>33,639</b>	<b>(51,100)</b>	<b>190,413</b>	<b>144,218</b>	<b>111,697</b>	<b>231,910</b>	<b>94,386</b>	<b>115,729</b>	<b>169,178</b>	<b>63,228</b>	<b>1,796,245</b>	<b>128,303</b>	
<b>Past 5 Years</b>																<b>722,900</b>	<b>144,580</b>	
Construction Deliveries	382,345	484,810	116,287	210,625	15,125	12,500	23,777	33,327	21,243	21,271	230,969	73,555	69,421	184,114	17,977	1,879,369		
Overall Base Rent/SF (NNN)	\$ 13.75	\$ 17.37	\$ 20.33	\$ 16.95	\$ 14.43	\$ 14.65	\$ 12.60	\$ 12.24	\$ 11.93	\$ 12.45	\$ 12.96	\$ 14.41	\$ 15.25	\$ 16.55	\$ 18.12			1.4%
Average Annual % Change	-	26.3%	17.0%	-16.6%	-14.9%	1.6%	-14.0%	-2.9%	-2.5%	4.4%	4.1%	11.2%	5.8%	8.5%	18.8%			

Source: CoStar, Inc.; Hillsborough County Economic Development; WTL+a, March 2020.

**Wimauma & Balm**

- As illustrated in Table 29, CoStar data indicate a sizable 2.05 million sq. ft. of retail space in **126 buildings proximate to both Balm and Wimauma**. Notably, retail is clustered in the Sun City Center and Big Bend Road areas; tenancies in these locations are primarily national credit (i.e., chain-affiliated and more creditworthy) retailers. The largest national credit retailer nearest Wimauma is Wal-Mart, with 203,637 sq. ft. delivered in 2007;
- Retail vacancies peaked at 10% during the national recession in 2010. Since then, vacancy rates have declined—to full occupancy with a vacancy rate of only 1.7% in 2019. In fact, **retail vacancy rates have been below 5% since 2013**, indicating stabilized market conditions;
- Since 2006, 1.02 million sq. ft. of new retail space has been built in the Sun City/Big Bend/U.S. 301 corridor. In Wimauma, this includes the Dollar General store (9,100 sq. ft.) in 2013 and Wawa (6,119 sq. ft.), delivered in 2017;

**Figure 13: Area Retail Properties—Sun City Center & Wimauma**

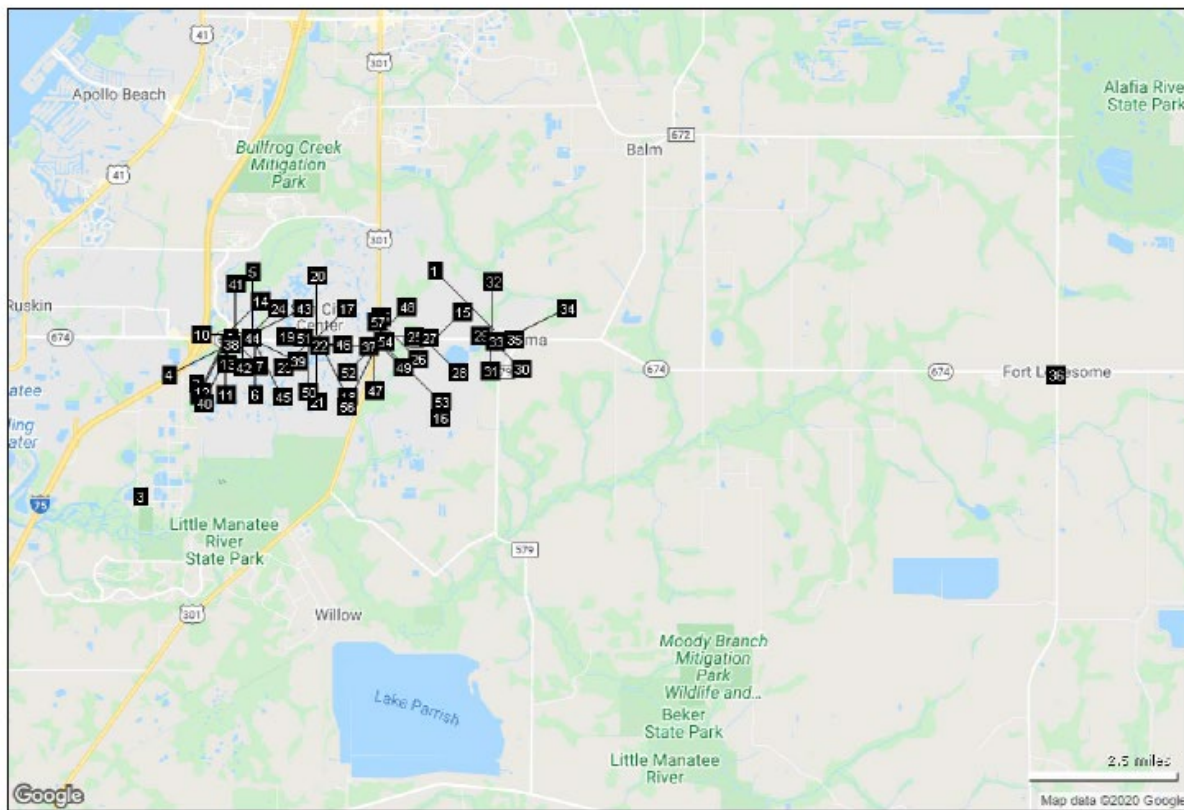
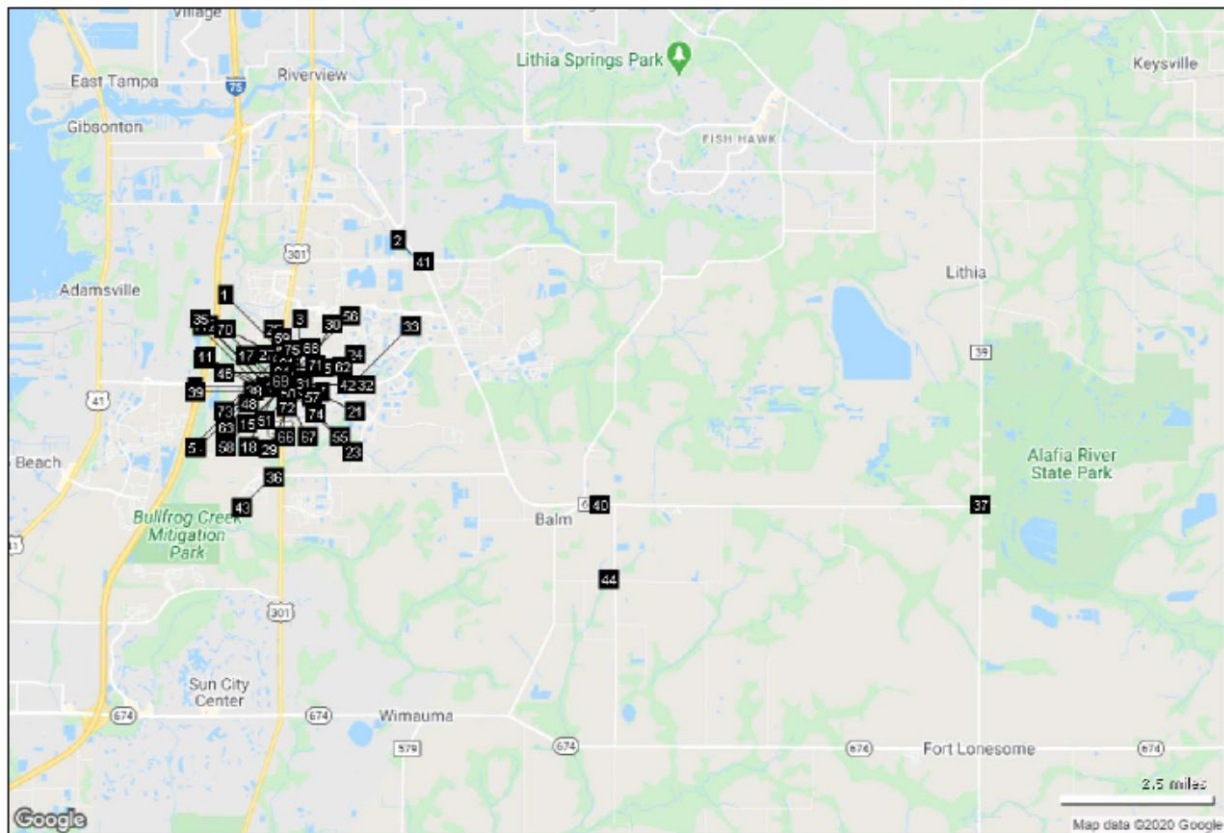


Figure 14: Area Retail Properties—Big Bend Road & Balm



- Annual net retail absorption in the Wimauma & Balm area averaged 69,700 sq. ft. per year in the 14-year period between 2006 and 2019. While there was positive net absorption in every year of the past 14 years, the pace of retail absorption declined over the past five years—to 46,000 sq. ft. per year—between 2015 and 2019; and
- Retail rents in the area *declined* between 2006 and 2019—from a peak of \$24.71 per sq. ft. (on a triple net basis whereby the retailer pays its pro rata share of operating expenses) in 2007 to \$16.09 per sq. ft. in 2019. It is not known why retail rents have declined.



**Table 29: Retail Profile—Wimauma & Balm**

	2006	2007	National Recession & Recovery				2012	2013	2014	2015	2016	2017	2018	2019	Q1/ 2020	Change: 2006-2019		
			2008	2009	2010	2011										Total	Ann'l Avg.	% CAGR
<b>Retail</b>																		
Inventory	1,085,564	1,406,236	1,490,329	1,640,742	1,664,137	1,812,367	1,812,697	1,825,855	1,843,585	1,856,441	1,871,654	1,920,968	1,965,203	2,052,286	2,061,263	<b>966,722</b>		
As % of Eastern Outlying	16%	20%	21%	22%	22%	24%	24%	24%	25%	25%	24%	25%	25%	25%	26%			
No. of Buildings/Centers	71	80	85	88	91	94	94	96	99	103	105	111	116	124	126			
Vacant Stock	11,847	39,494	76,073	163,561	165,662	159,708	103,635	72,932	56,775	51,615	43,006	25,320	37,687	35,040	28,496	<b>23,193</b>		
Vacancy Rate	1.1%	2.8%	5.1%	10.0%	10.0%	8.8%	5.7%	4.0%	3.1%	2.8%	2.3%	1.3%	1.9%	1.7%	1.4%			<b>3.5%</b>
<b>Net Absorption:</b>	<b>32,358</b>	<b>293,025</b>	<b>47,514</b>	<b>62,925</b>	<b>21,294</b>	<b>154,184</b>	<b>56,403</b>	<b>43,861</b>	<b>33,887</b>	<b>18,016</b>	<b>23,822</b>	<b>67,000</b>	<b>31,868</b>	<b>89,730</b>	<b>15,521</b>	<b>975,887</b>	<b>69,706</b>	
<b>Past 5 Years</b>																<b>230,436</b>	<b>46,087</b>	
Construction Deliveries	43,395	320,672	84,093	150,413	23,395	148,230	3,282	13,158	17,730	12,856	15,213	49,314	44,235	98,739	8,977	<b>1,024,725</b>		
Gross Rent/SF	\$ 16.71	\$ 24.21	\$ 22.49	\$ 14.50	\$ 13.61	\$ 13.57	\$ 14.83	\$ 13.31	\$ 14.47	\$ 13.48	\$ 13.99	\$ 17.71	\$ 17.97	\$ 16.09	\$ 18.18			<b>-0.3%</b>
Average Annual % Change	-	44.9%	-7.1%	-35.5%	-6.1%	-0.3%	9.3%	-10.3%	8.8%	-6.9%	3.8%	26.6%	1.4%	-10.5%	1.2%			

Source: CoStar, Inc.; Hillsborough County Economic Development; WTL+a, March 2020.



Table 30: Retail Properties in Wimauma & Balm (Partial List per CoStar, Inc.)

Property Address	Property/Tenant Name	Year Built	Building Area (SF)
<b>Retail</b>			
404 7th St		1978	1,932
5133 Hwy 674 Hwy	Circle K	1982	2,400
2324 W Lake Dr		1993	10,312
14809 Massey Acres Dr		1981	1,752
4920 State Road 674	Murphy USA	2008	1,178
4928 State Road 674	Wal-Mart	2007	203,637
5128 State Road 674		1998	3,668
5129 State Road 674		1976	6,247
5574 State Road 674		2007	3,180
5630 State Road 674	Mexican Restaurant	1960	1,326
5635 State Road 674	Dollar General	2013	9,100
5641 State Road 674		1950	1,274
5649 State Road 674	Auto Repair Shop	1946	1,735
5802 State Road 674	BP	1985	2,544
5914 State Road 674		1987	3,000
13838 Sweat Loop Rd	13838 Sweatloop Rd	1997	1,620
16620 S US Highway 301	Wawa	2017	6,119
16620 S US Highway 301	Outparcels-Corner Lot	2017	7,083
16640 S US Highway 301		2002	5,400
16701 S US Highway 301		1961	33,854
14809 Massey Acres Dr		1981	1,752
<b>Subtotal - Retail:</b>			<b>309,113</b>

Source: CoStar, Inc.; WTL+a, March 2020.

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# 5 Community Infrastructure & Environment

## Historical Overview

The Wimauma area of southern Hillsborough County was first settled around 1875 as an agriculture- and citrus-producing area. It remained rural until 1902, when an extension of the Seaboard Air Railroad was constructed through the area, resulting in the development of sawmills, turpentine production, truck farming of vegetables, cattle farming, a meat packing plant and other businesses. Captain Charles H. Davis purchased extensive forested property in the area for both production of turpentine and timber for use as railroad ties. In 1907, the town was platted and established at a halfway point along the railroad's route between Durant and Sarasota/Bradenton. Captain Davis secured the location of both a rail depot and a U.S. Post Office and named the Post Office location (and the town) by combining the first several letters of the names of his three daughters, Willie, Maude and Mary (WiMauMa). The small community grew to a population of 500 by 1918 and had three churches, three general stores, a physician and two fruit and vegetable businesses.

In 1912, a minister of the Church of God visited Wimauma, and purchased 10 acres of land as a camp meeting location, which was relocated from Pleasant Grove, Florida. The church's 10-day camp meetings grew over time—from about 1,000 attendees in the first few years to over 10,000—resulting in construction of a larger, permanent facility. Associated with the camp meetings, over 200 privately-owned cottages were also constructed, with some now occupied by retired ministers and their families. There are also spaces for temporary camping trailers.

Wimauma remained an agricultural and farming area through the 1970s until the rail line discontinued operations in 1976. Although Wimauma was Hillsborough County's fourth incorporated city when it was established, municipal functions ceased during the Great Depression of the 1930s; Wimauma was later designated as an unincorporated area of southern Hillsborough County.

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## Wimauma WVR-2 & Balm RP-2 Plans

Wimauma and Balm are both located within the “SouthShore Area-wide Systems Plans” (SSASP), originally adopted in September 2003. SouthShore refers to the southern part of unincorporated Hillsborough County, comprising the area located generally south of the Alafia River. SouthShore is a fast-growing area of Hillsborough County, having experienced rapid development of new residential and commercial areas over the past 60 years. Examples of large master planned communities that changed the rural character of South County include:

- **Sun City Center**—comprising approximately 10,100 acres and located within the Urban Service Area, Sun City Center was created in 1961, and
- **Fishhawk Ranch**—comprising approximately 3,000 acres, Fishhawk Ranch commenced development in the mid-1990s, and is located in the Rural Service Area.

Both developments are proximate to both Balm and Wimauma.

In 2008, the Comprehensive Plan for Unincorporated Hillsborough County was amended to incorporate a Future Land Use component (Ordinance 08-13). The plan amendment detailed a Growth Management Strategy to guide future County decisions and policies to “optimize the investment for services and infrastructure, protect the vulnerability of the natural environment, reduce the exposure and risk to natural hazards and provide a clear direction for achieving an efficient development pattern.” The Growth Management Strategy has three primary components: (a) an environmental overlay, (b) an Urban Service Area (USA), and (c) a defined rural area. Planning for the Rural Service Area (RSA) was intended for land to remain in long-term agriculture, mining or large lot residential development, and to reinforce rural communities that exist within the RSA, such as Thonotosassa, Keystone, Lutz and others.

The plan also provided for development of planned villages within rural areas, and were intended to be “essentially self-supporting communities that plan for a balanced mix of land uses, including residential, commercial, employment and the supporting services such as schools, libraries, parks and emergency services”. Another planning intent of the 2008 amendment was to maximize internal trip capture and avoid the creation of single dimensional communities that create urban sprawl.

As part of ongoing community planning efforts across Hillsborough County, updated Community Profiles are being prepared for specific locations. For example, Ruskin’s Community Profile

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was completed in August 2019, and this report constitutes a Community Profile for Wimauma. A separate report details findings on real estate market conditions and development opportunities for desired land uses within both the WVR-2 and RP-2 planning areas, and planning components of the community plan updates are ongoing at the time of this report (June 2020).

The Wimauma Community Plan boundary includes five special planning sub-areas:

- Sub-area #1 Wimauma Light Industrial/Office District
- Sub-area #2 Wimauma Town Center District
- Sub-area #3 Wimauma Downtown District
- Sub-area #4 Wimauma West Lake District
- Sub-area #5 Wimauma West End District

Consistent with other community profiles, this section of the Wimauma Community Plan Area Profile includes a series of maps (prepared by the Planning Commission) illustrating various characteristics of the Wimauma area. These include:

- **Existing/Future Land Uses, Zoning & Property Ownership**—such as existing and future land use, vacant developable land, etc.
- **Existing Zoning & Property Ownership**—such as existing zoning and property ownership patterns, etc.
- **Capital Improvement Program (CIP) & Transportation**—such as CIP projects, by status, existing and future transportation, bicycle/pedestrian connections, population densities by traffic analysis zones, etc.
- **Community Facilities**—such as schools, historic resources, hospitals, parks, etc.
- **Environmental Features**—such as 100-year floodplains, significant wildlife habitat and wetlands, and
- **Communities of Concern & Unemployment**—as defined by Hillsborough County, areas that meet designated criteria of community concerns as well as unemployment rates by Census tracts.

## Existing & Future Land Use

The land use pattern in the five sub-districts comprising Wimauma Village is varied:

- **Light Industrial/Office District**—located at the eastern end of the study area alongside the State Route 674 corridor, the sub-area contains agricultural (undeveloped) land, a strip of public communications/utilities (Wimauma Air Park, a general aviation facility), one single-family parcel, and public or institutional use(s) (under Hillsborough County ownership)
- **Town Center District**—this district comprises approximately 17 full or partial blocks located between Edina Street on the east; 7<sup>th</sup> Street on the west; Camp Street on the south; and the alley above Center Street on the north. The core of Wimauma Village’s commercial uses are located here, including businesses such as Boost Mobile, Wesco Food Mart, Taqueria Los Angeles, Wimauma Auto Parts, a BP gas station, Garcia’s Bakery, Taqueria El Sol and El Paraiso Tire & Auto Repair. Institutional uses include: Templo Filadelfia and Wimauma Spanish SDA Church
- **Downtown District**—located in the central portion of Wimauma Village along the 674 corridor, this district contains a mix of single-family residential, light commercial, significant institutional parcels (Church of God properties and other churches), Wimauma Elementary School on Hickman Street, and commercial uses such as Dollar General, US Post Office, Quest Ecology and Turf Keepers
- **West Lake District**—this district comprises approximately five blocks surrounding or near the intersection of State Route 674 and West Lake Drive. It includes single-family residential and vacant residential lots; Pennrose Farms/Wm. P. Hearne Produce, Inc. (agricultural); and light commercial uses such as Don Julio’s (restaurant), M&C Lawn Mower Repair, Wimauma NOW/Enterprising Latinas’ office, Circle K convenience mart, a Shell gas station and Metro by T Mobile
- **West End District**—this district includes the remainder of the 674 corridor between Kenilworth Avenue and U.S. Route 301. Existing land uses include: several single-family parcels and a mobile home park; several large vacant parcels; the entrances to both Sereno and South Shore Bay (master planned communities); and both heavy and light commercial uses such as Big Jim Self Storage, Sun City Automotive, a portion of the surface parking lot for the Wal-Mart Supercenter; PNC Bank and Wawa at U.S. 301.

Figure 15: Existing Land Use—Wimauma Light Industrial/Office District

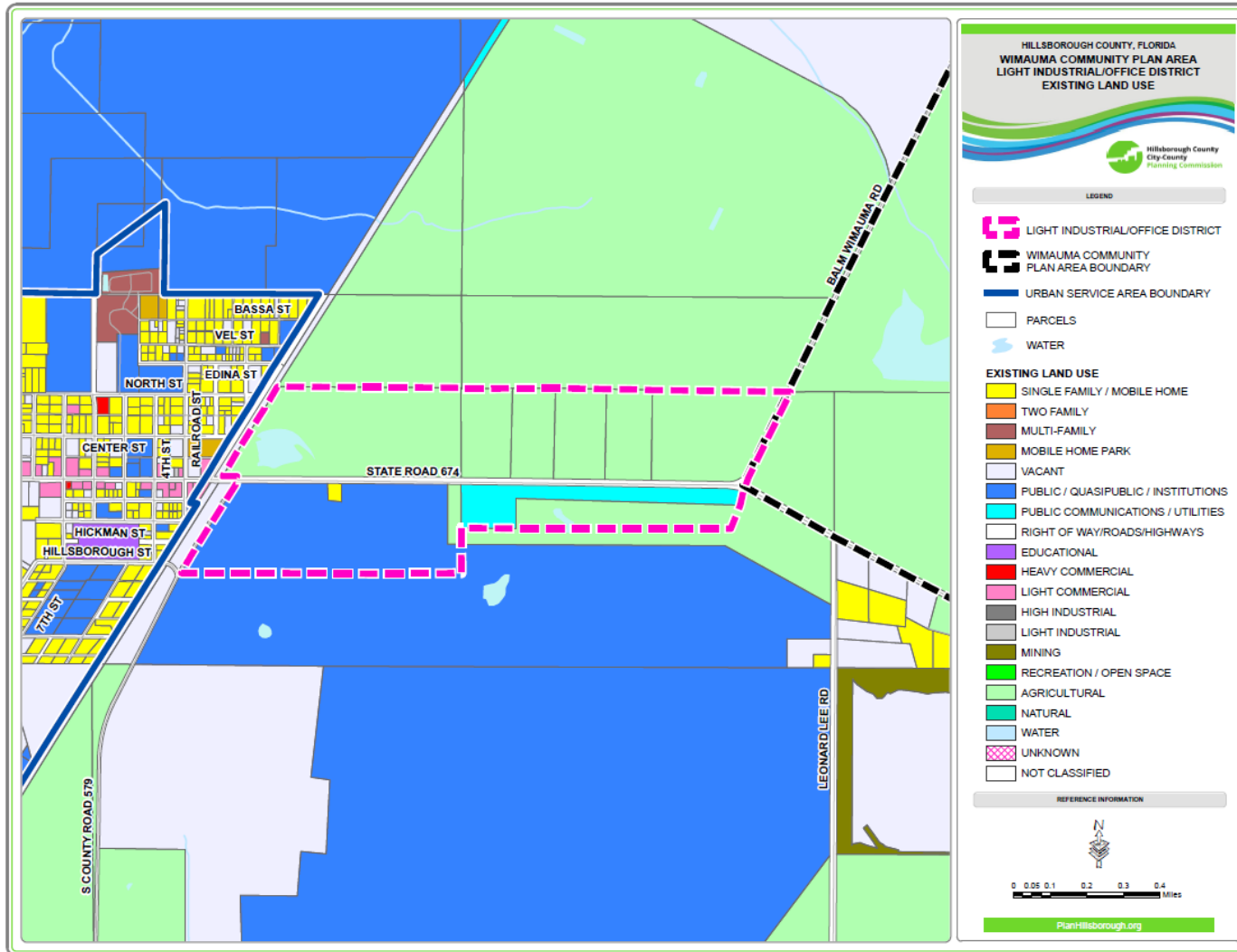
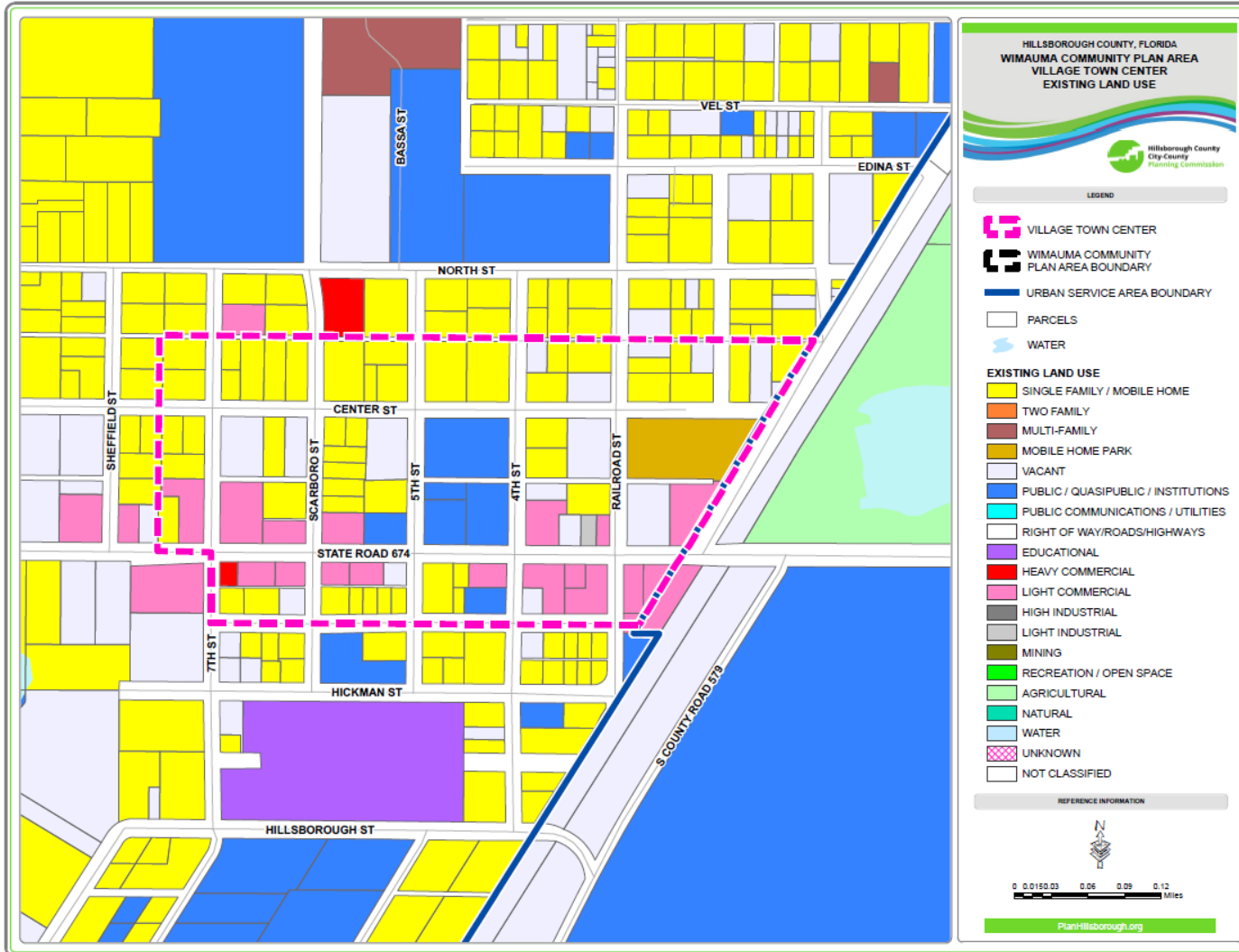


Figure 16: Existing Land Use—Wimauma Town Center District

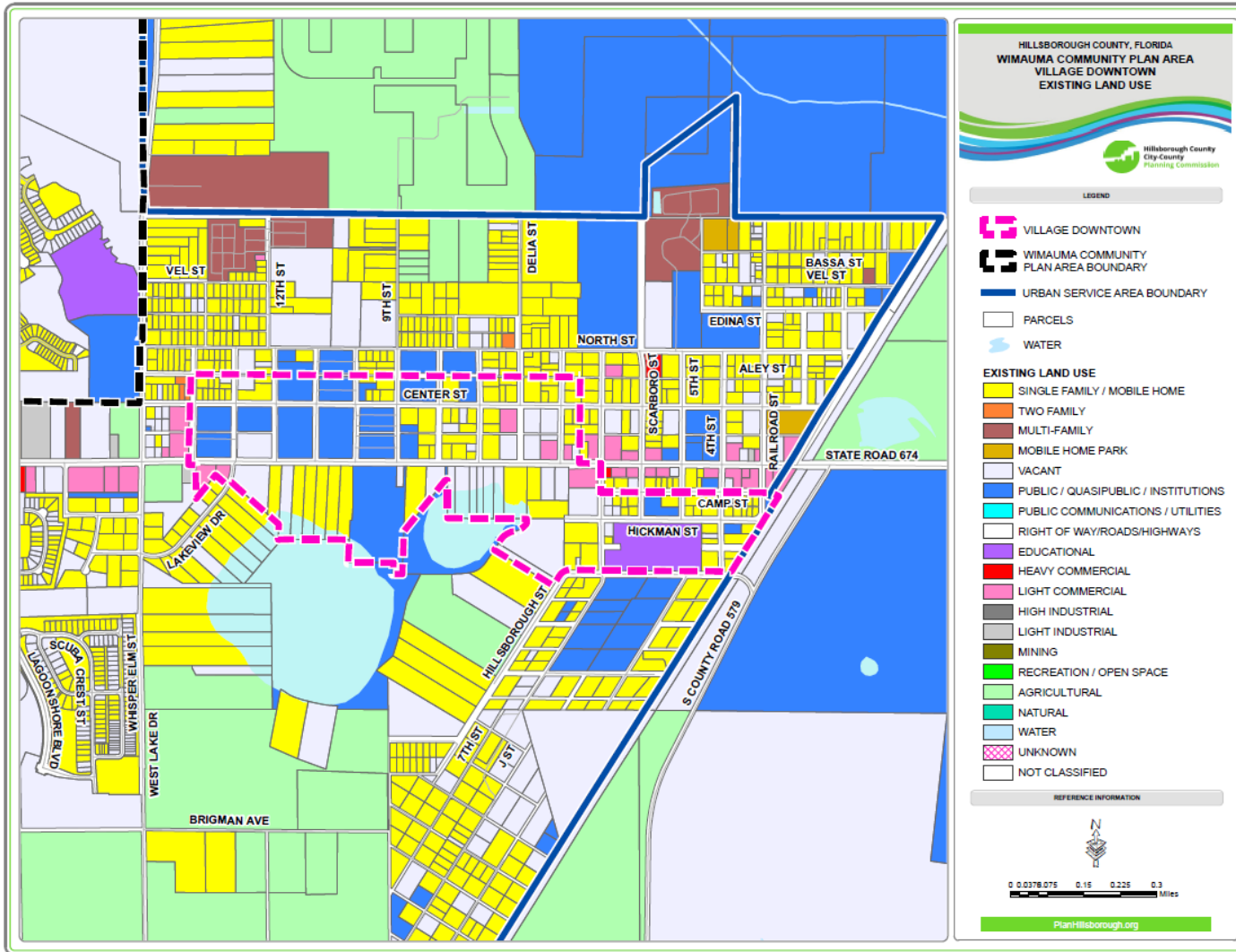


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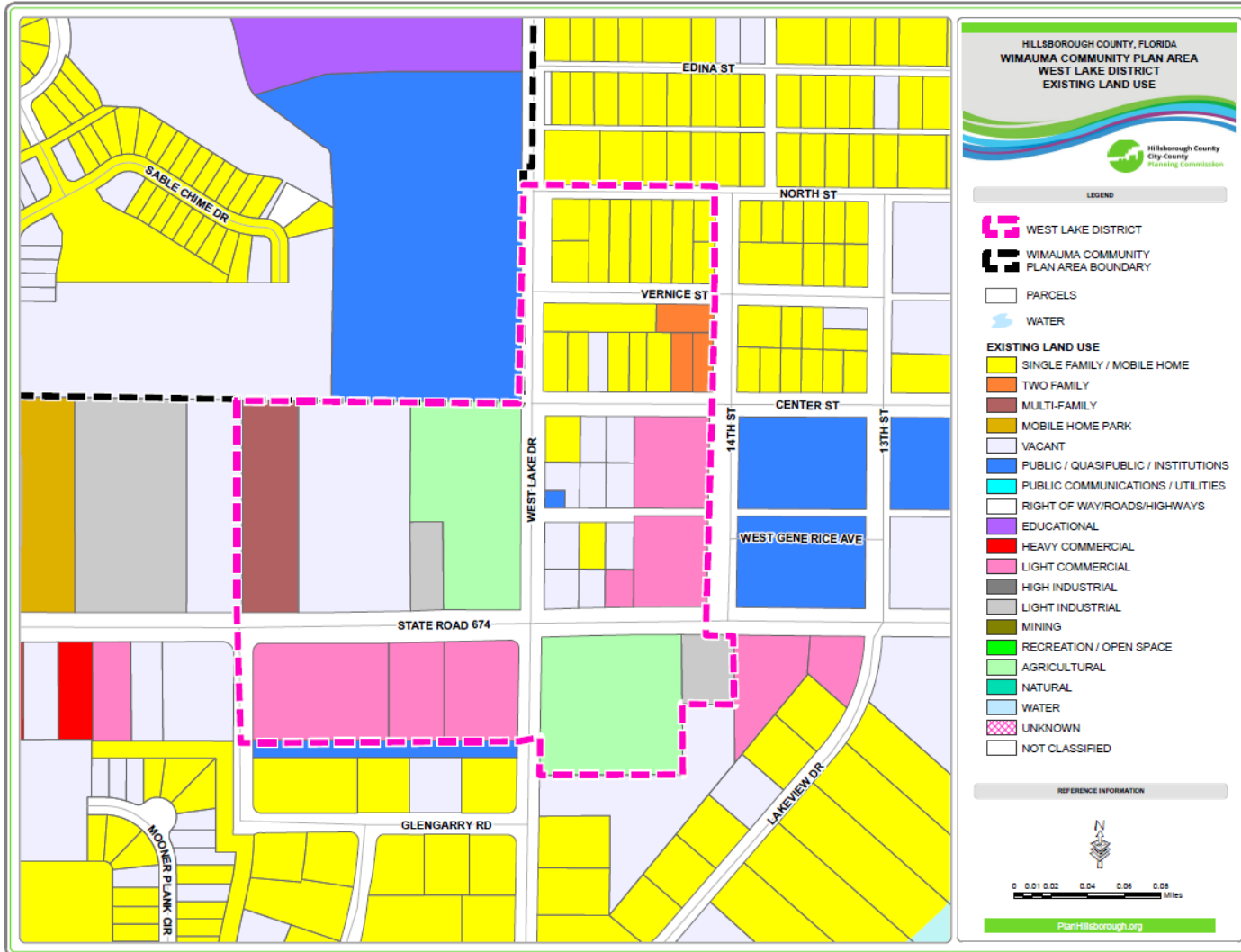
Figure 17: Existing Land Use—Wimauma Downtown District



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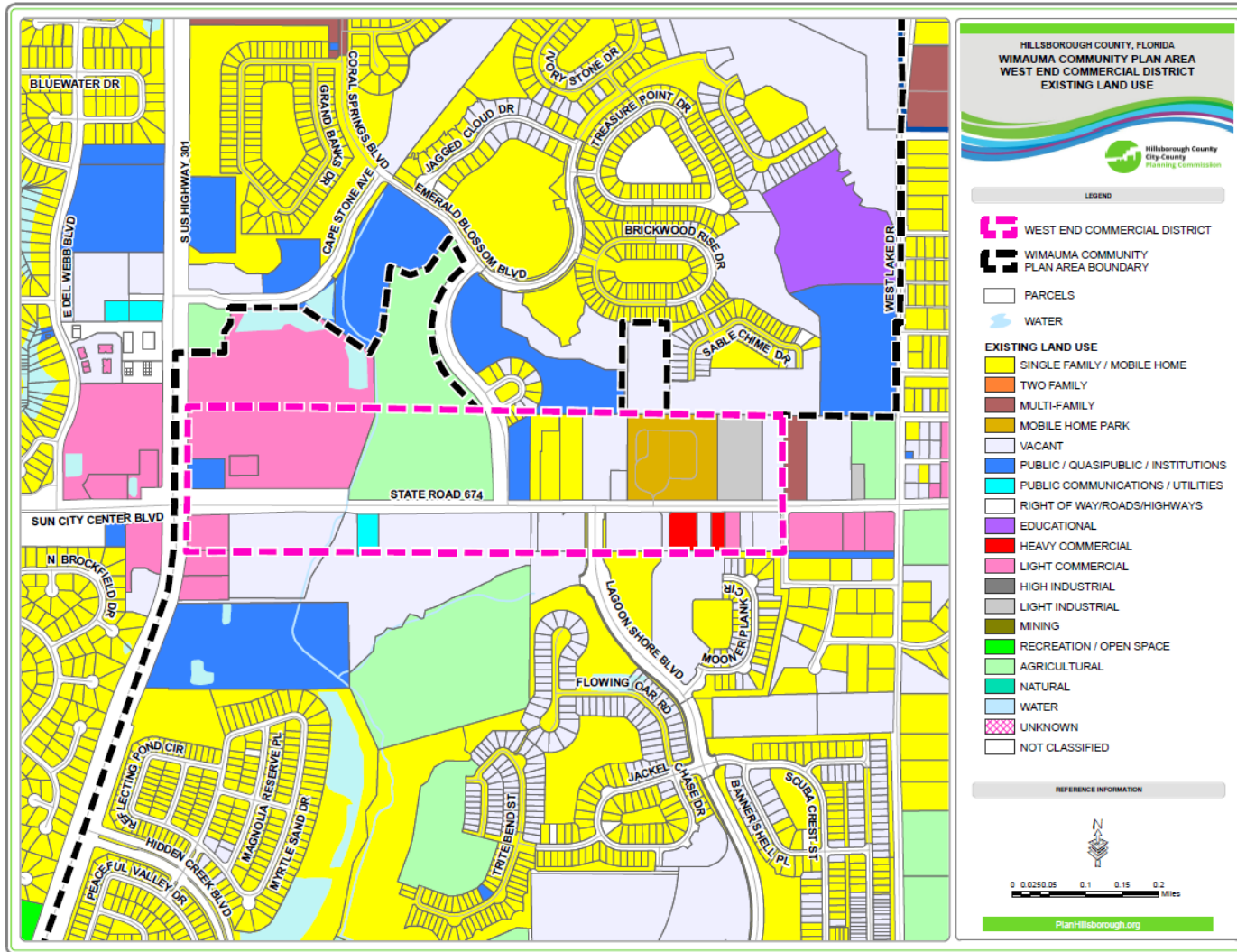
Figure 18: Existing Land Use—Wimauma West Lake District



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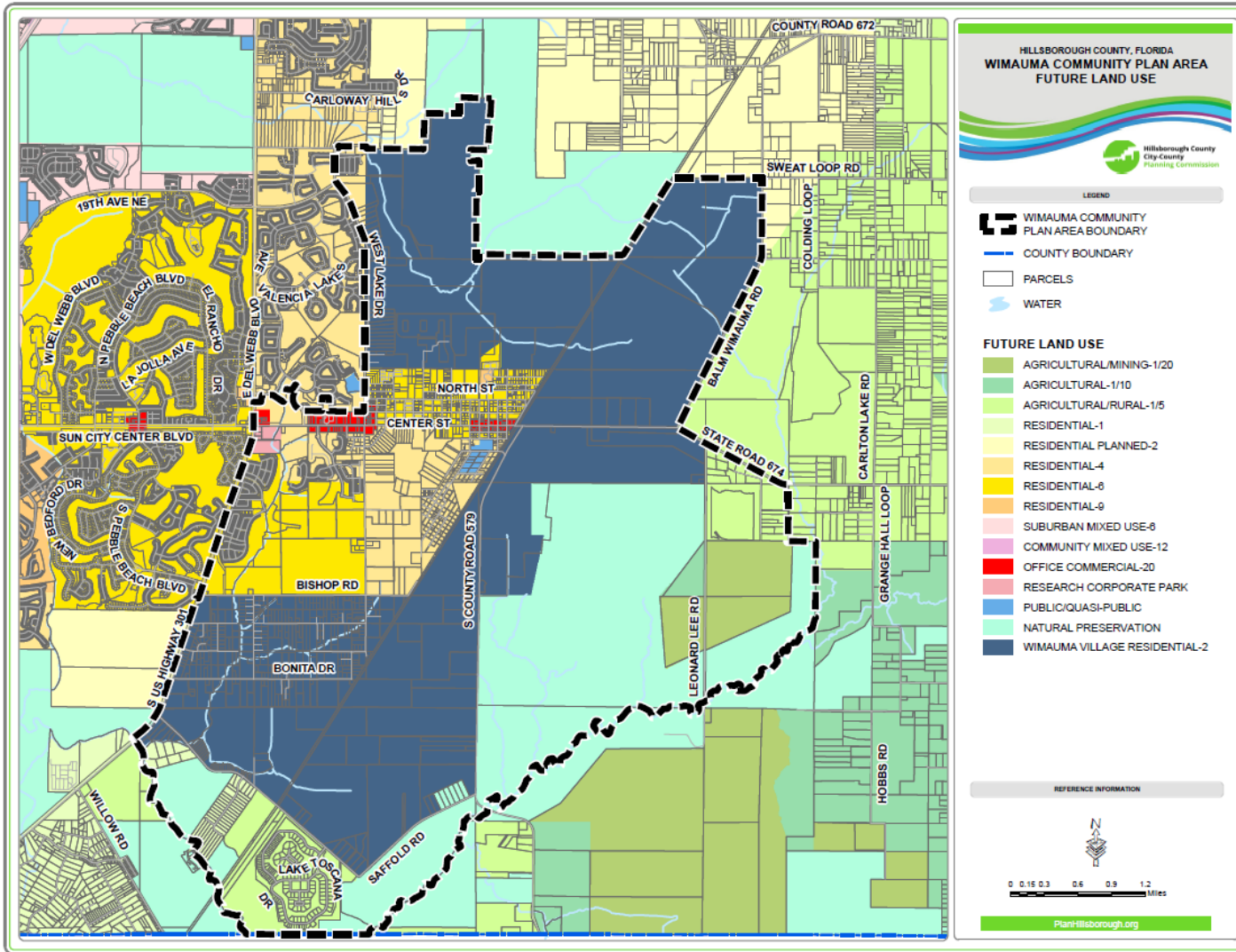
Figure 19: Existing Land Use—Wimauma West End District



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Figure 20: Future Land Use



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## Existing Zoning & Property Ownership

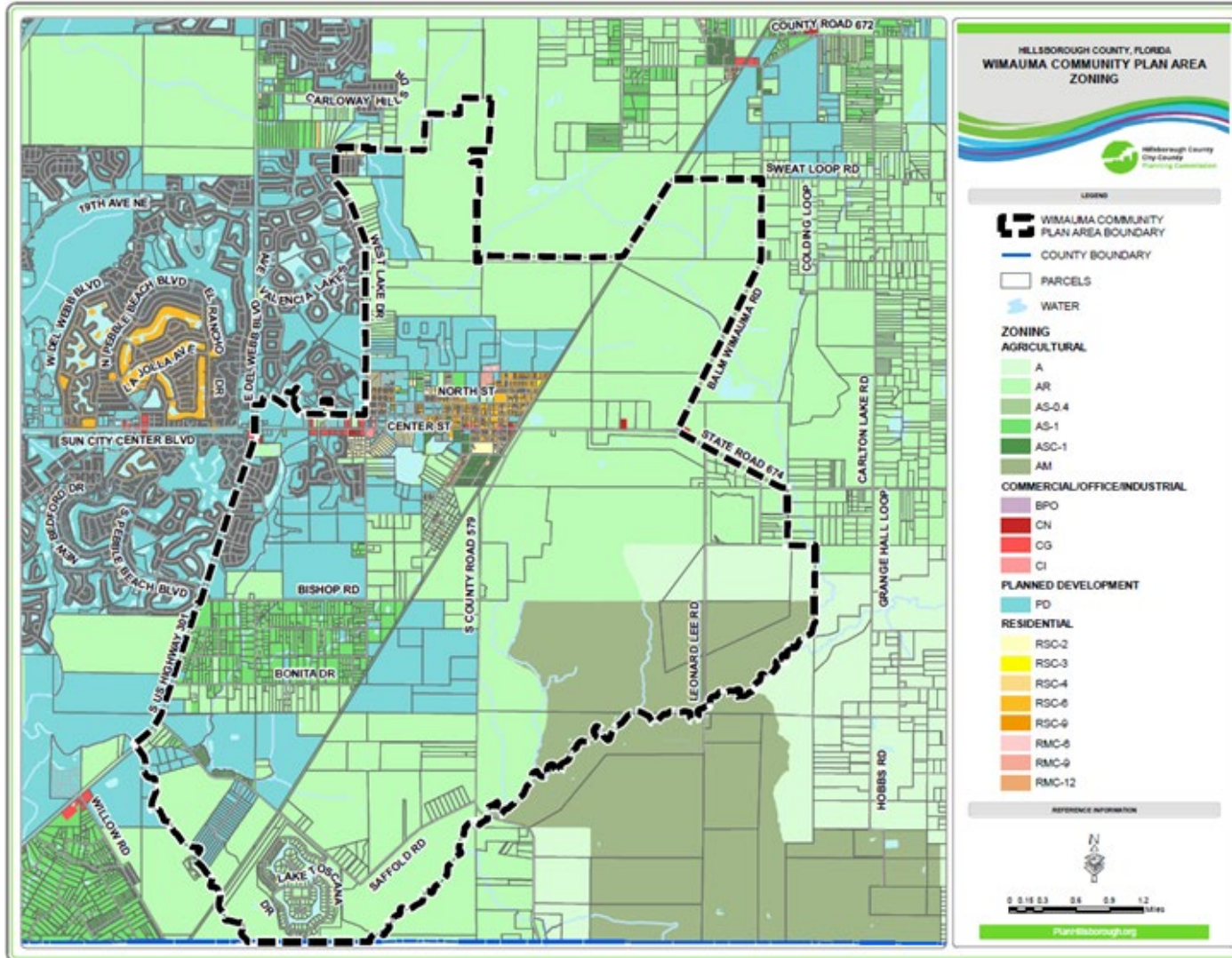
As illustrated in Figure 21, the Wimauma Community Plan Area contains a mix of zoning categories, including: Agricultural (with six categories), Commercial/Office/Industrial (with four categories), Planned Development/PD, and Residential (with eight categories). Agricultural zoning is designated on large portions on the outer edges of Wimauma, while PD zoning is designated on multiple parcels to the south and west of Wimauma Village within the Community Plan Area. The village itself contains a mix of Residential and Commercial zoning.

As illustrated in Figure 22, Hillsborough County owns significant acreage in Wimauma. County data indicate that **there are 5,761 acres (approximately 35% of the entire study area) in public/institutional uses**. These publicly-owned properties are tax exempt.

Table 31 depicts existing and future land uses in the Wimauma Community Plan Area. WTL+a notes the contrasts in this data between existing and future land uses, particularly residential. Key findings indicate that:

- Agriculture accounts for 39% of the study area, with 6,433 acres. The Future Land Use Map (FLUM) indicates this will decline, to 34.5% and 5,654 acres
- The amount of land for commercial “workplace” uses (77 acres, 0.5% of total) is expected to increase by 60%, to 123 acres (0.7% of total)
- The most notable change between existing and future land uses is expected in Residential. Currently, there are 2,226 acres (13.6%) designated to residential. **The FLUM shows a significant increase in residential—to 10,561 acres (64.5%), a 374% increase**
- The increase in residential comes at the expense of “Other” and “Vacant” designations, which could decline by (5,812) and (1,732) acres, respectively.

Figure 21: Existing Zoning—Wimauma Community Plan Area



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**Table 31: Existing & Future Land Use—Wimauma Community Plan Area**

Category	Existing Land Uses			Future Land Uses			% Change in Land Use
	No. of Parcels	Acres	% of Total	No. of Parcels	Acres	% of Total	
<b>Agriculture/Mining &amp; Preservation</b>							
Agricultural	116	6,363	39.0%				
Agriculture/Mining-1/20 (.25 FAR)				3	523	3.2%	
Agriculture/Rural-1/5 (.25 FAR)				171	940	5.7%	
Agriculture-1/10 (.25 FAR)				1	59	0.4%	
Mining	1	53	0.3%				
Natural Preservation	1	17	0.1%	14	4,132		
<b>Subtotal-Agriculture/Mining/Natural:</b>	<b>118</b>	<b>6,433</b>	<b>39.4%</b>	<b>189</b>	<b>5,654</b>	<b>34.5%</b>	<b>-12%</b>
<b>Commercial (Workplace)</b>							
Heavy Commercial	4	3	0.0%				
Light Commercial	37	68	0.4%				
Light Industrial	4	6	0.0%				
Office/Commercial				105	89	0.5%	
Research Corporate Park				5	34	0.2%	
<b>Subtotal-Commercial:</b>	<b>45</b>	<b>77</b>	<b>0.5%</b>	<b>110</b>	<b>123</b>	<b>0.7%</b>	<b>60%</b>
<b>Residential</b>							
Mobile Home Park	9	41	0.3%				
Multi-family Residential	8	59	0.4%				
Residential-1 (.25 FAR)				49	171	1.0%	
Residential-4 (.25 FAR)				741	1,010	6.2%	
Residential-6 (.25 FAR)				1,367	1,281	7.8%	
Residential-9 (.35 FAR)				1	9	0.1%	
Single-family & Mobile Home	1,997	2,109	12.9%				
Two-family Residential	7	17	0.1%				
Wimauma Village Residential				527	8,091	49.4%	
<b>Subtotal-Residential:</b>	<b>2,021</b>	<b>2,226</b>	<b>13.6%</b>	<b>2,685</b>	<b>10,561</b>	<b>64.5%</b>	<b>374%</b>
<b>Other</b>							
Public/Institutional	82	5,761	35.3%	10	31	0.2%	
Educational	1	12	0.1%			0.0%	
ROW/Roads/Highways	9	67	0.4%				
Unknown	2	4					
<b>Subtotal-Other:</b>	<b>94</b>	<b>5,843</b>	<b>35.8%</b>	<b>10</b>	<b>31</b>	<b>0.2%</b>	<b>-99%</b>
<b>Vacant Land</b>							
Vacant	700	1,732	10.6%				
<b>Subtotal-Vacant:</b>	<b>700</b>	<b>1,732</b>	<b>10.6%</b>	<b>-</b>	<b>-</b>	<b>0.0%</b>	<b>-100%</b>
<b>TOTAL:</b>	<b>2,978</b>	<b>16,311</b>	<b>100.0%</b>	<b>2,994</b>	<b>16,368</b>	<b>100.0%</b>	

Source: Hillsborough County Planning Commission; WTL+a, May 2020.





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## Capital Improvement Program (CIP) & Transportation

As illustrated in Table 32, according to Hillsborough County, there are 13 active CIP projects in Wimauma and an additional three active CIP projects in Balm. Capital improvements range from utility, drainage and water quality improvements, culvert repair and replacement, bridge replacement or repair, roadway resurfacing and parks and public facilities improvements, such as the Wimauma Fire Station #22. The **13 CIP projects in Wimauma, valued at \$18,733,801**, include:

- Six projects under construction with a cost of \$1,798,043
- Two projects in planning with a cost of \$2,971,187
- Three projects in the closeout stage with a cost of \$4,210,718, and
- One project on-hold with a cost of \$3,230,000 and one ongoing project in multiple locations with a cost of \$6,523,853.

The **three projects in Balm, valued at \$8,079,948**, include:

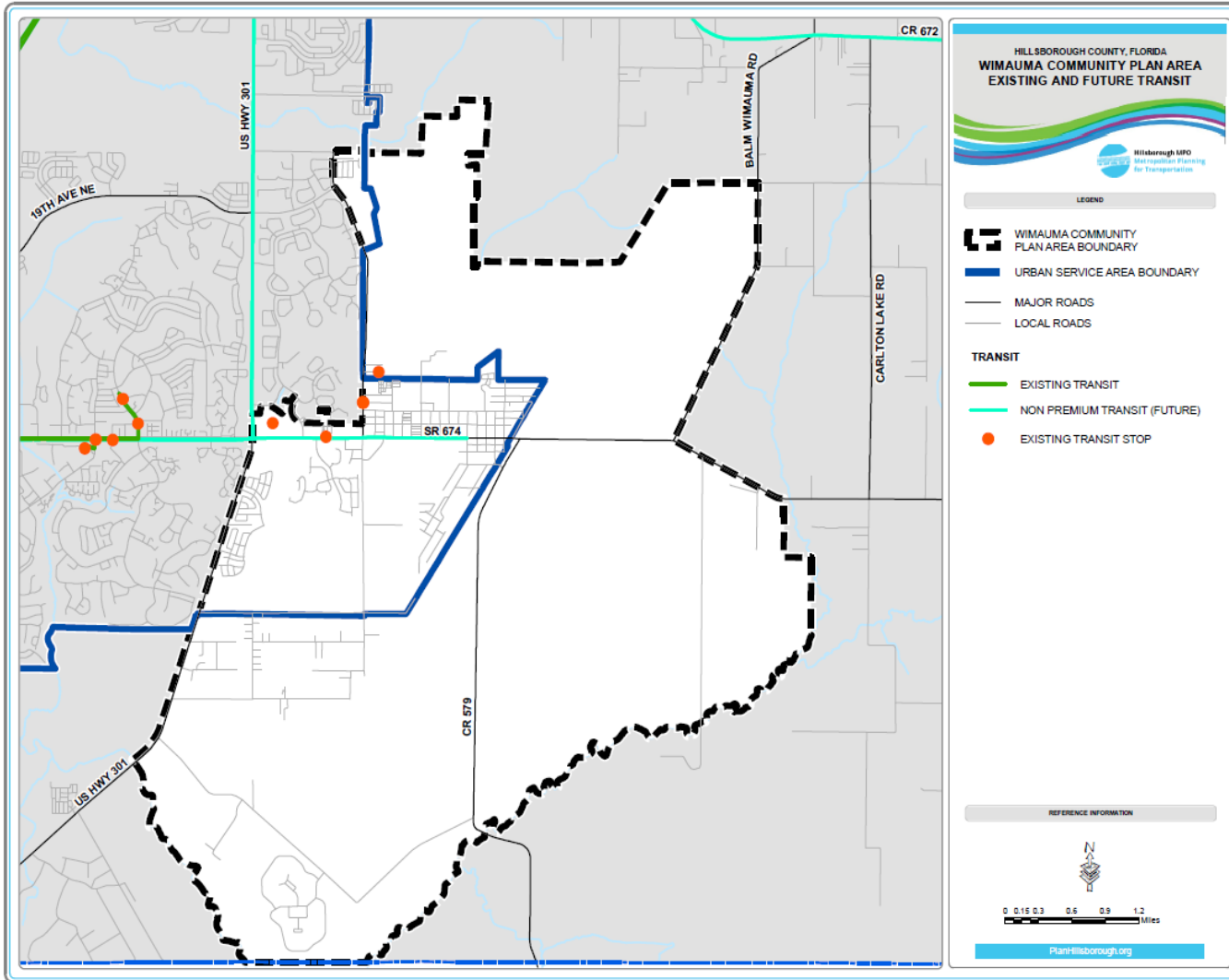
- One project under construction with a cost of \$1,305,121
- One project in the closeout stage with a cost of \$250,974, and
- One ongoing project in multiple locations with a cost of \$6,523,853.

**Table 32: Capital Improvement Plan Projects—Wimauma & Balm**

Project	Type	Phase	Community	Cost
<b>Wimauma</b>				
US 301 - Balm Road to SR 674	Potable Water - Public Utilities	Construction	Balm/Wimauma - District 4	\$ -
16410 Balm Wimauma Rd Culvert Renewal and Replacement	Culvert Repair and Replacement - Stormwater	Construction	Balm/Wimauma - District 4	136,340
2611 Crestview Rd Culvert Renewal and Replacement	Culvert Repair and Replacement - Stormwater	Construction	Balm/Wimauma - District 4	326,080
FY20 South Service Unit Pre-Pavement Culvert Renewal and Replacement	Culvert Repair and Replacement - Stormwater	Construction	Multiple - Multiple	1,305,121
Brody Blvd. Road Resurfacing by Neighborhood	Roadway Resurfacing - Transportation	Construction	Balm/Wimauma - District 4	30,502
Lakeview Dr. Road Resurfacing by Neighborhood	Roadway Resurfacing - Transportation	Construction	Balm/Wimauma - District 4	-
<b>Subtotal - Under Construction:</b>				<b>\$ 1,798,043</b>
Little Manatee River Watershed Model Update Due to Soil HSG Changes	Drainage and Water Quality Improvements - Stormwater	Planning	Balm/Wimauma - District 4	\$ 199,000
Bridge #104366 (Saffold Road over Dug Creek) Replacement	Bridge - Transportation	Planning	Balm/Wimauma - District 4	2,772,187
<b>Subtotal - Planning:</b>				<b>\$ 2,971,187</b>
County Road 579 Drainage Improvements	Drainage and Water Quality Improvements - Stormwater	Closeout	Balm/Wimauma - District 4	\$ 540,718
Bethune Park	Parks and Recreation - Parks and Recreation	Closeout	Balm/Wimauma - District 4	760,000
Wimauma Fire Station #22 Replacement	Fire Rescue - Facilities	Closeout	Balm/Wimauma - District 4	2,910,000
<b>Subtotal - Closeout:</b>				<b>\$ 4,210,718</b>
New Adult Day Health Services Center - South County	Government Facilities - Facilities	On Hold	Balm/Wimauma - District 4	\$ 3,230,000
Annual Countywide Bank Rehabilitation and Scour Re-Stabilization	Bridge - Transportation	Ongoing	Multiple	\$ 6,523,853
<b>TOTAL - Wimauma:</b>				<b>\$ 18,733,801</b>
<b>Balm</b>				
FY20 South Service Unit Pre-Pavement Culvert Renewal and Replacement	Culvert Repair and Replacement - Stormwater	Construction	Multiple	\$ 1,305,121
13998 Balm Boyette Rd Culvert Renewal and Replacement	Culvert Repair and Replacement - Stormwater	Closeout	Lithia - District 4	\$ 250,974
Annual Countywide Bank Rehabilitation and Scour Re-Stabilization	Bridge - Transportation	Ongoing	Multiple	\$ 6,523,853
<b>TOTAL - Balm:</b>				<b>\$ 8,079,948</b>

Source: Hillsborough County; WTL+a, June 2020.

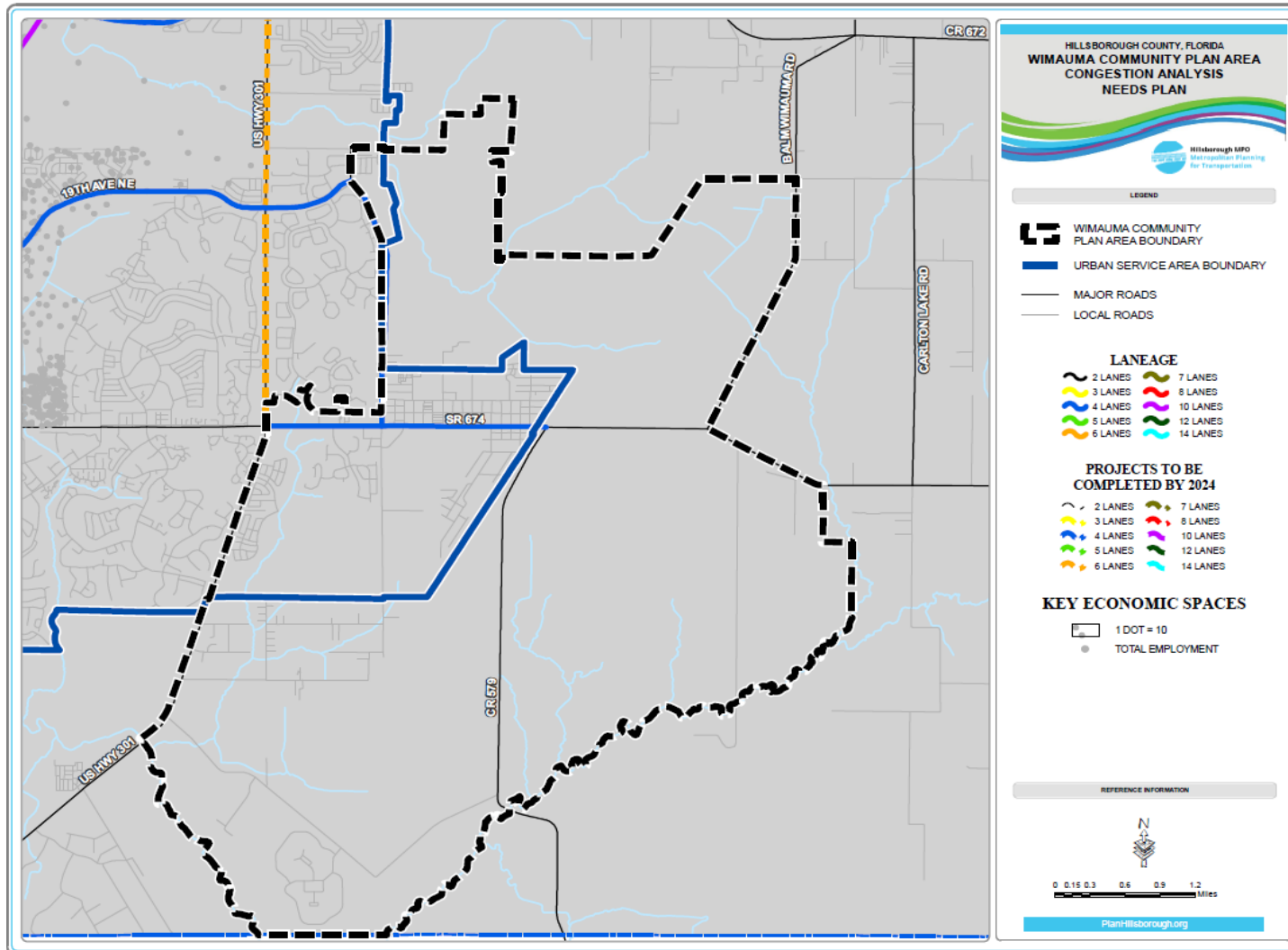
Figure 23: Existing & Future Transit Projects



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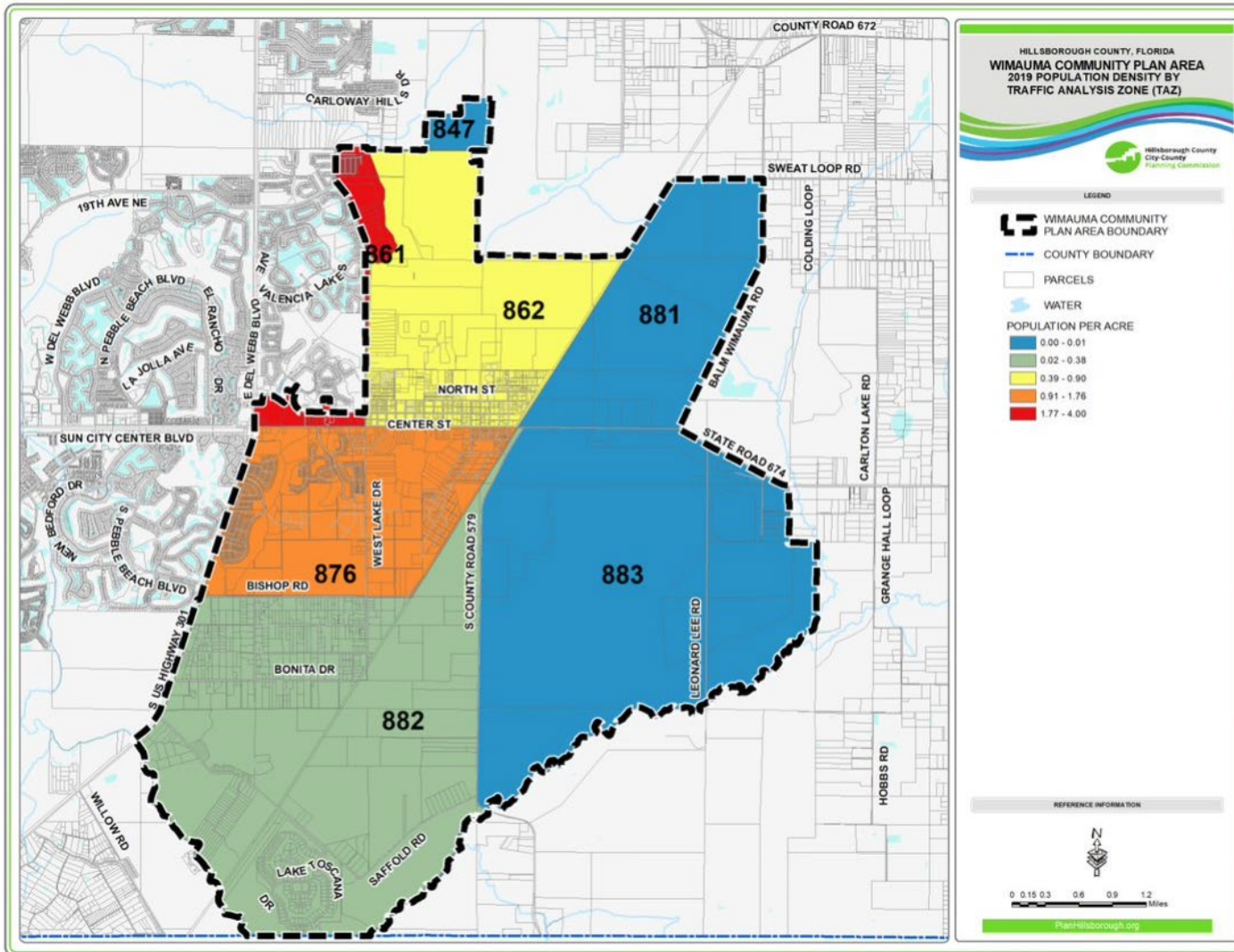
Figure 24: Congestion Needs Plan



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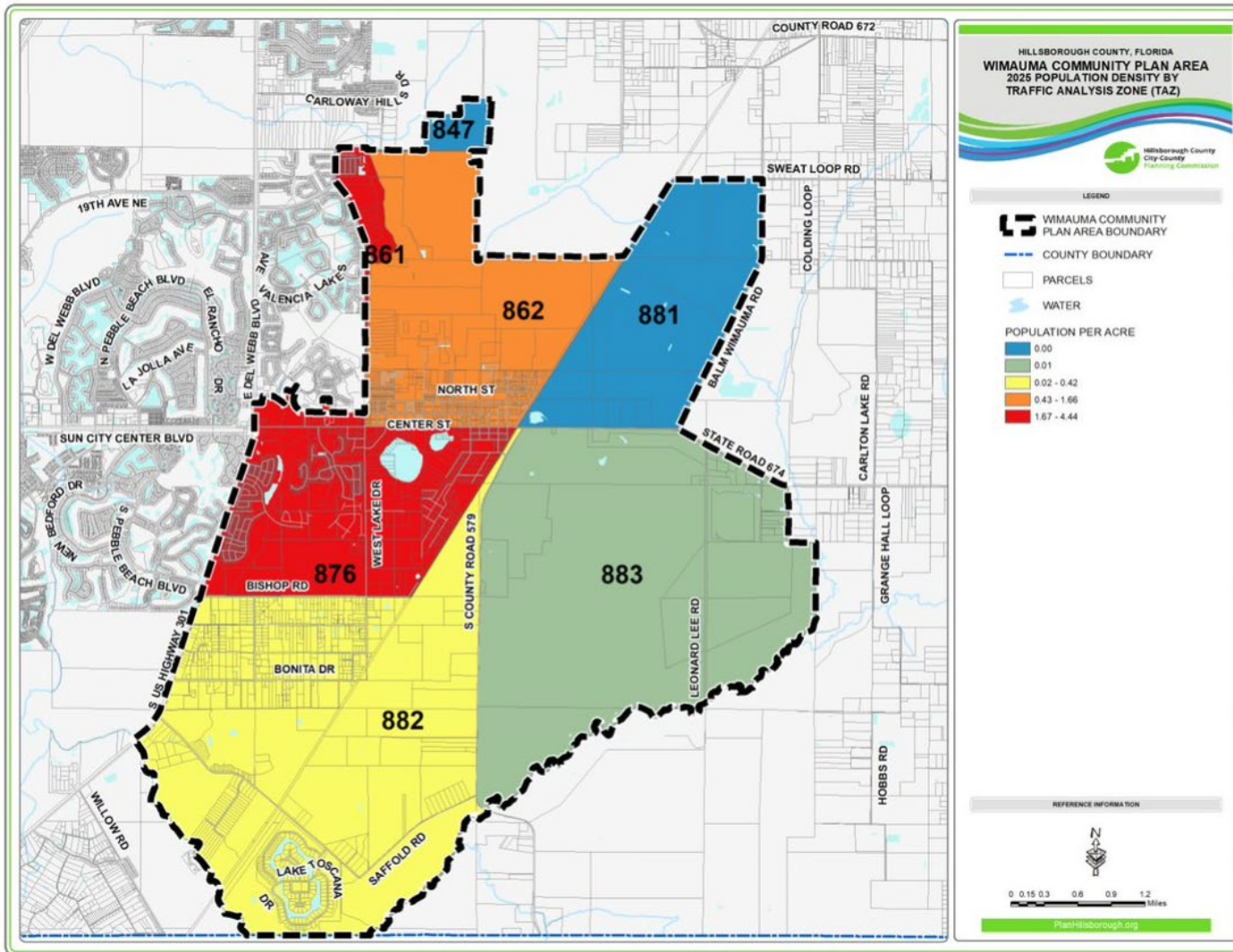
Figure 25: Population Density by Traffic Analysis Zone (TAZ)—2019



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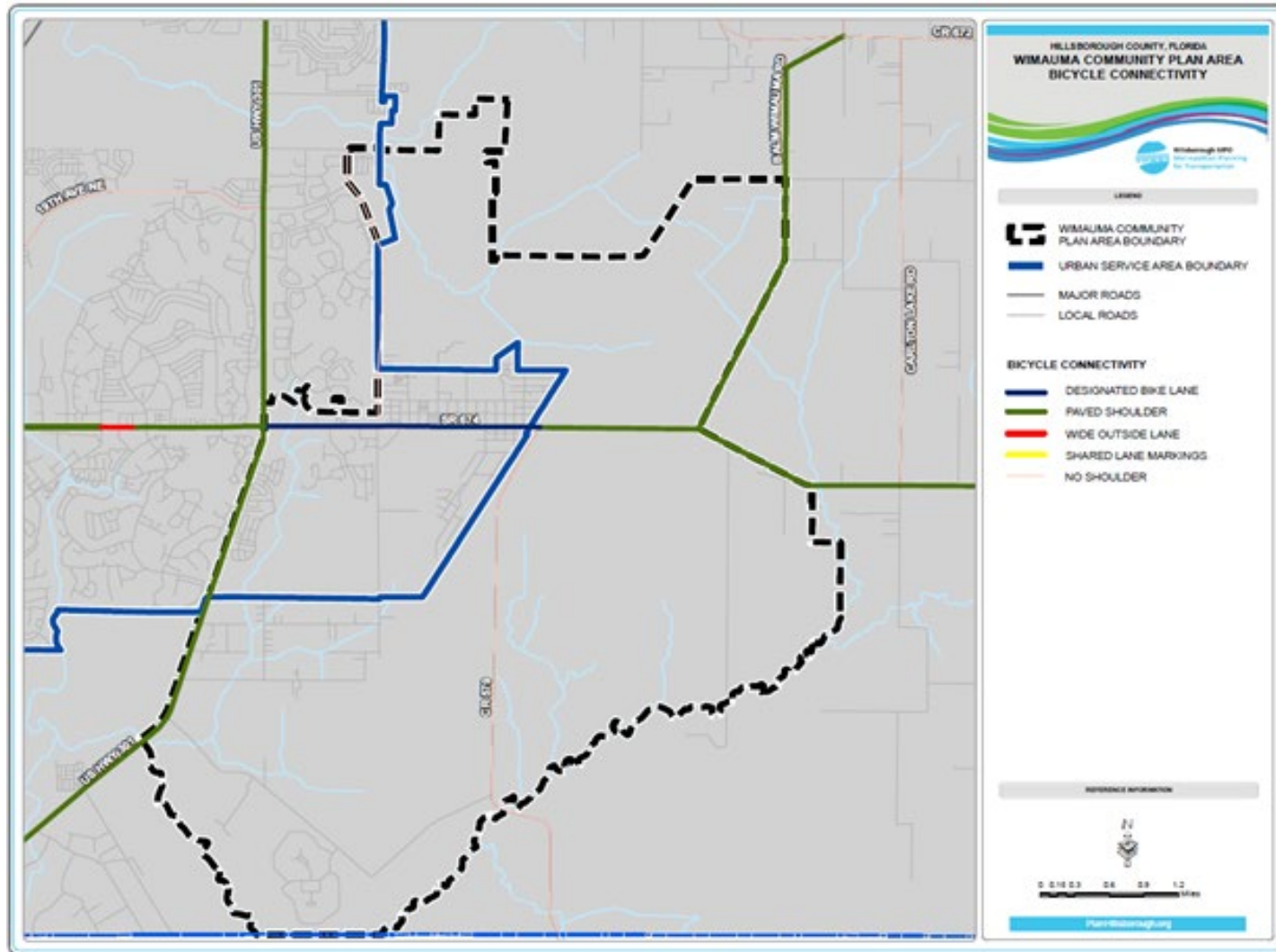
Figure 26: Population Density by Traffic Analysis Zone (TAZ)—2025



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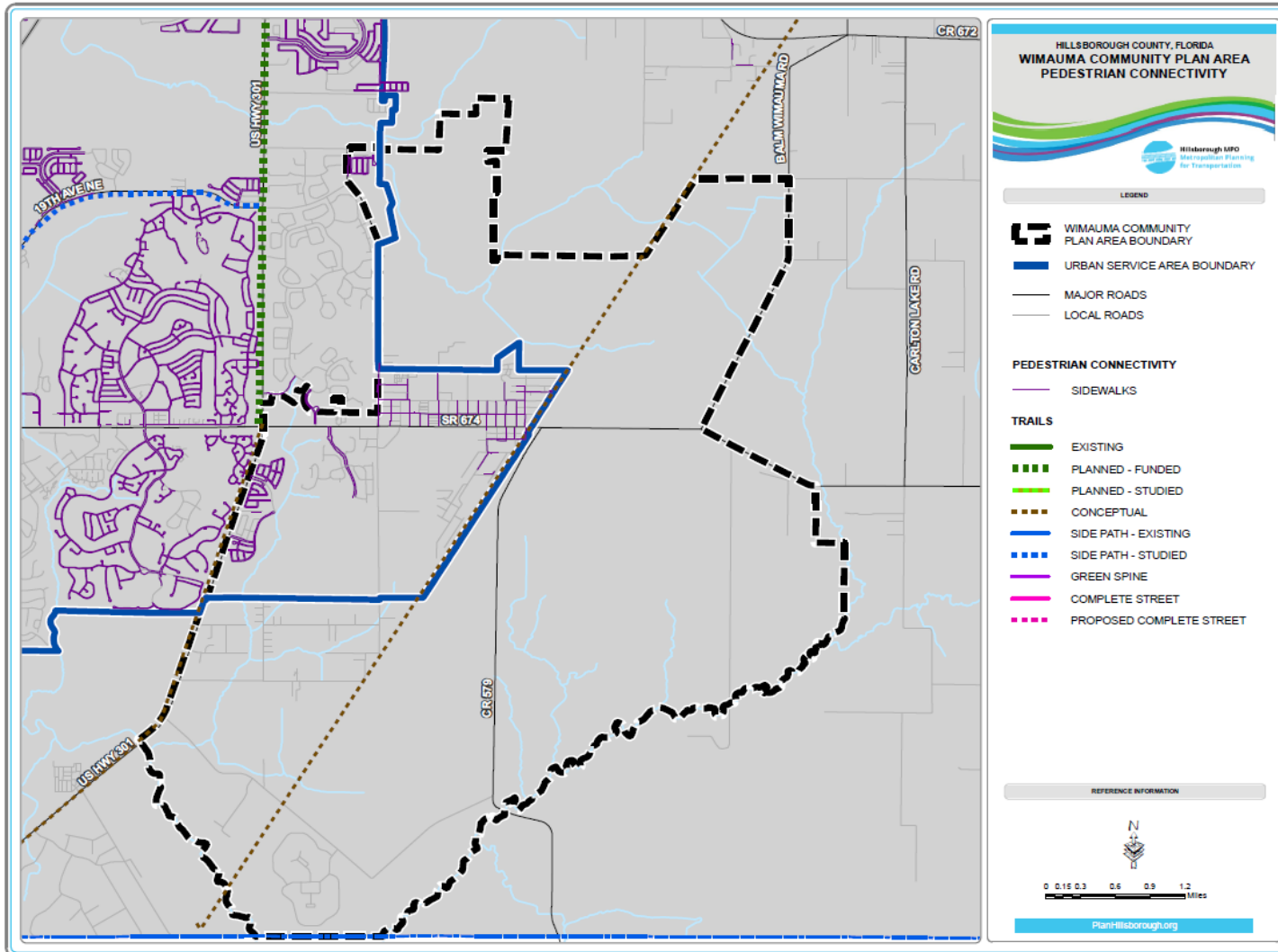
Figure 27: Bicycle Connectivity



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Figure 28: Pedestrian Connectivity



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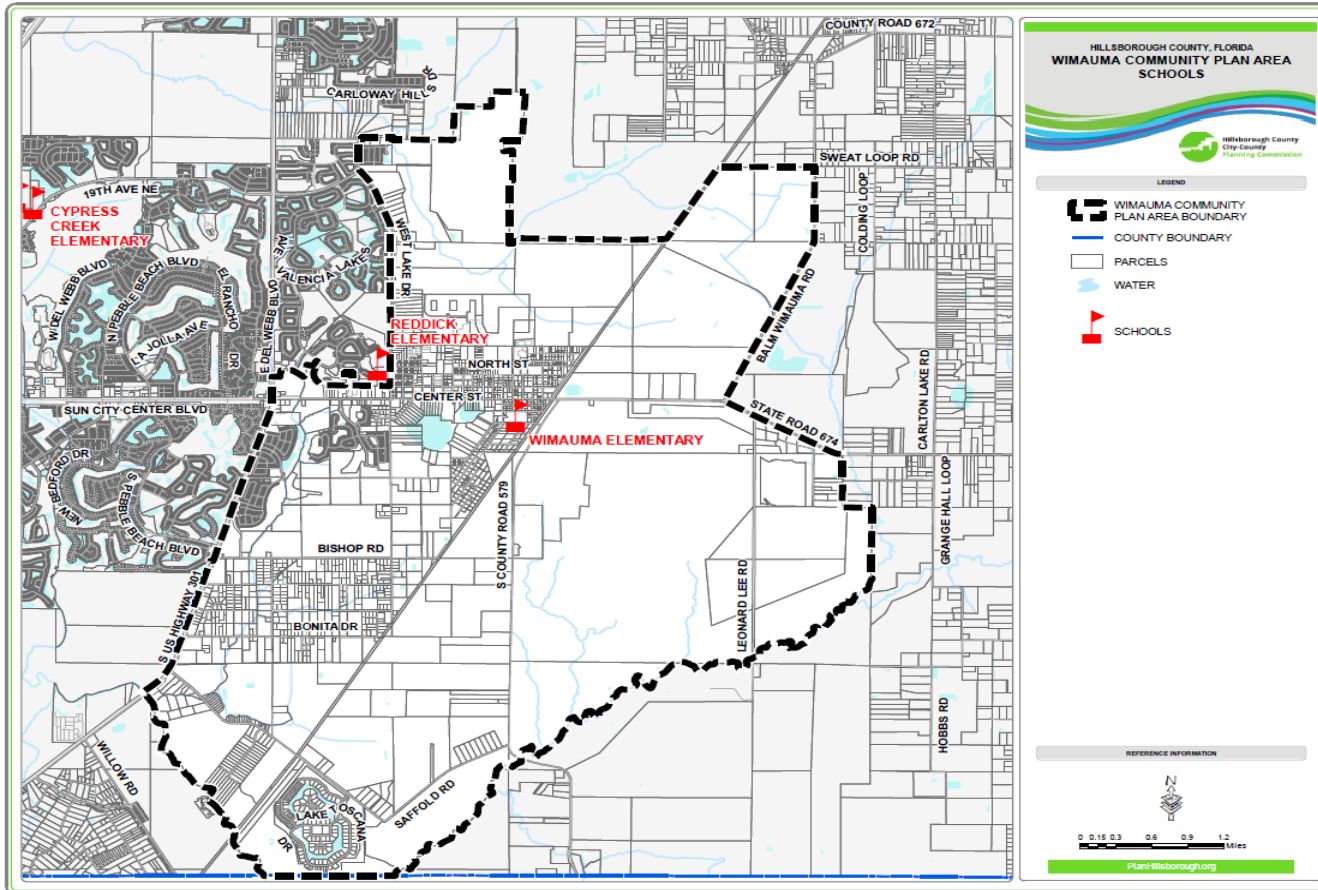
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## Community Facilities

The following illustrate various community facilities in the Wimauma Community Plan Area, including bicycle and pedestrian connections, schools, historic resources, and, hospitals and parks.

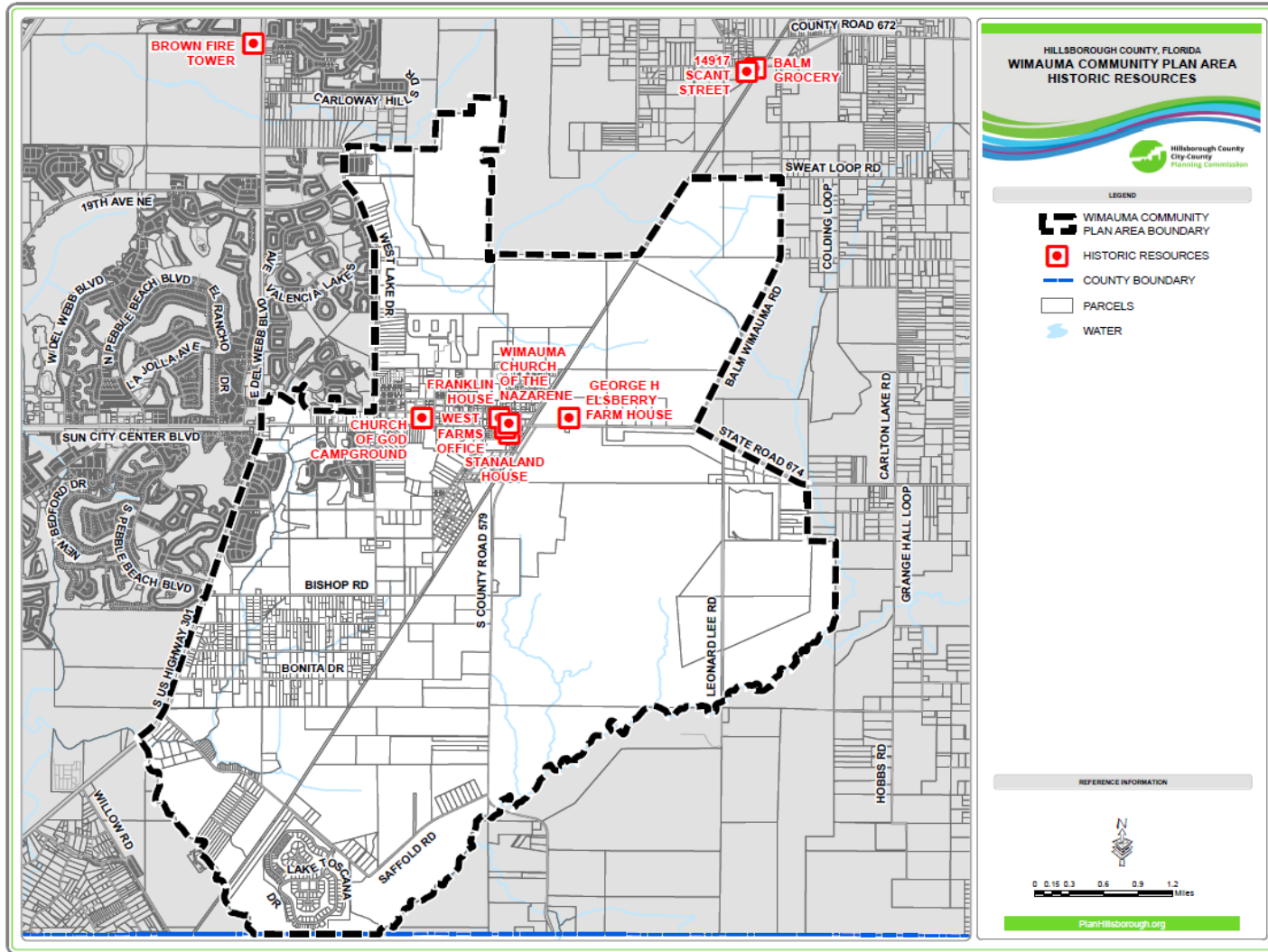
Figure 29: Community Facilities—Schools



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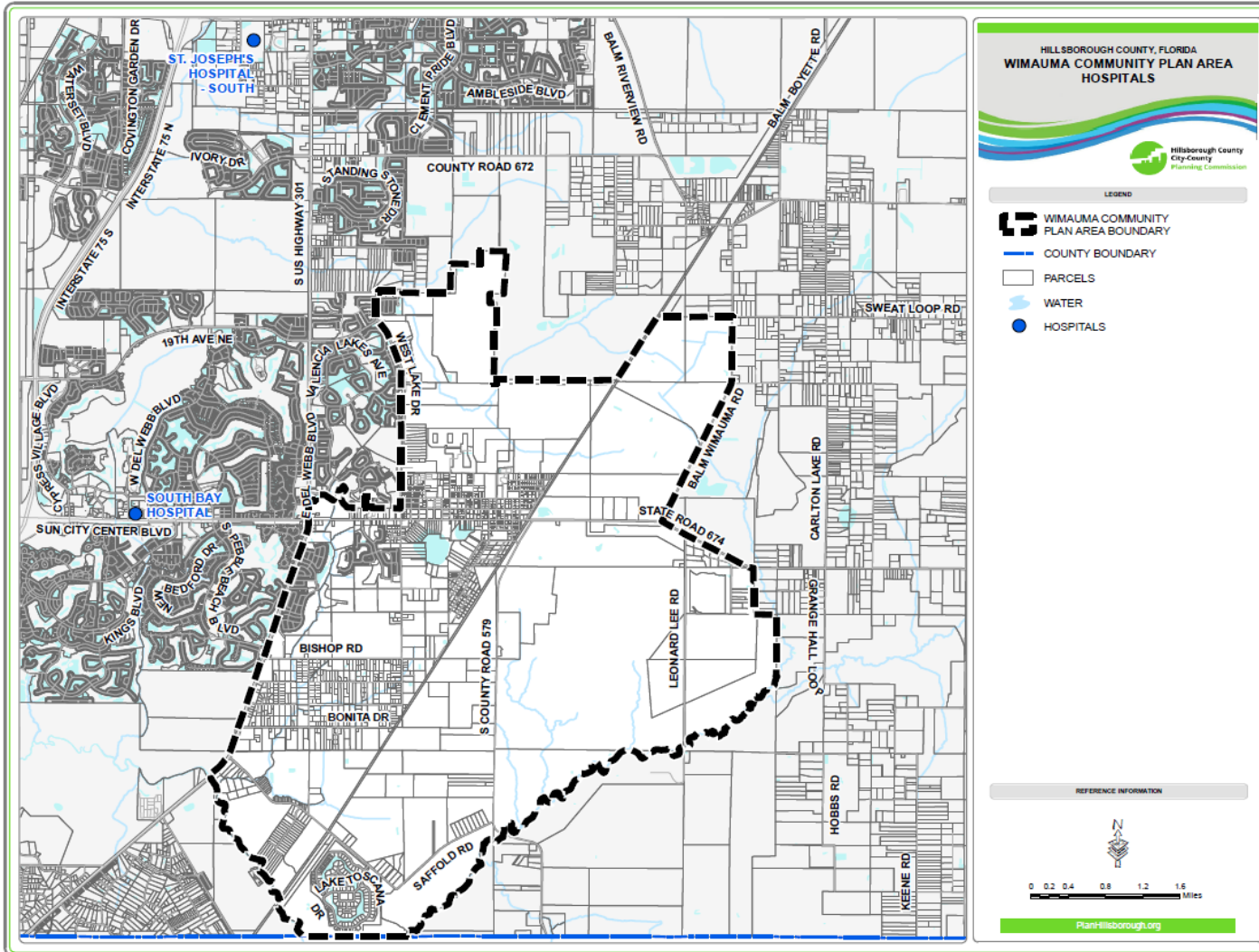
Figure 30: Community Facilities—Historic Resources



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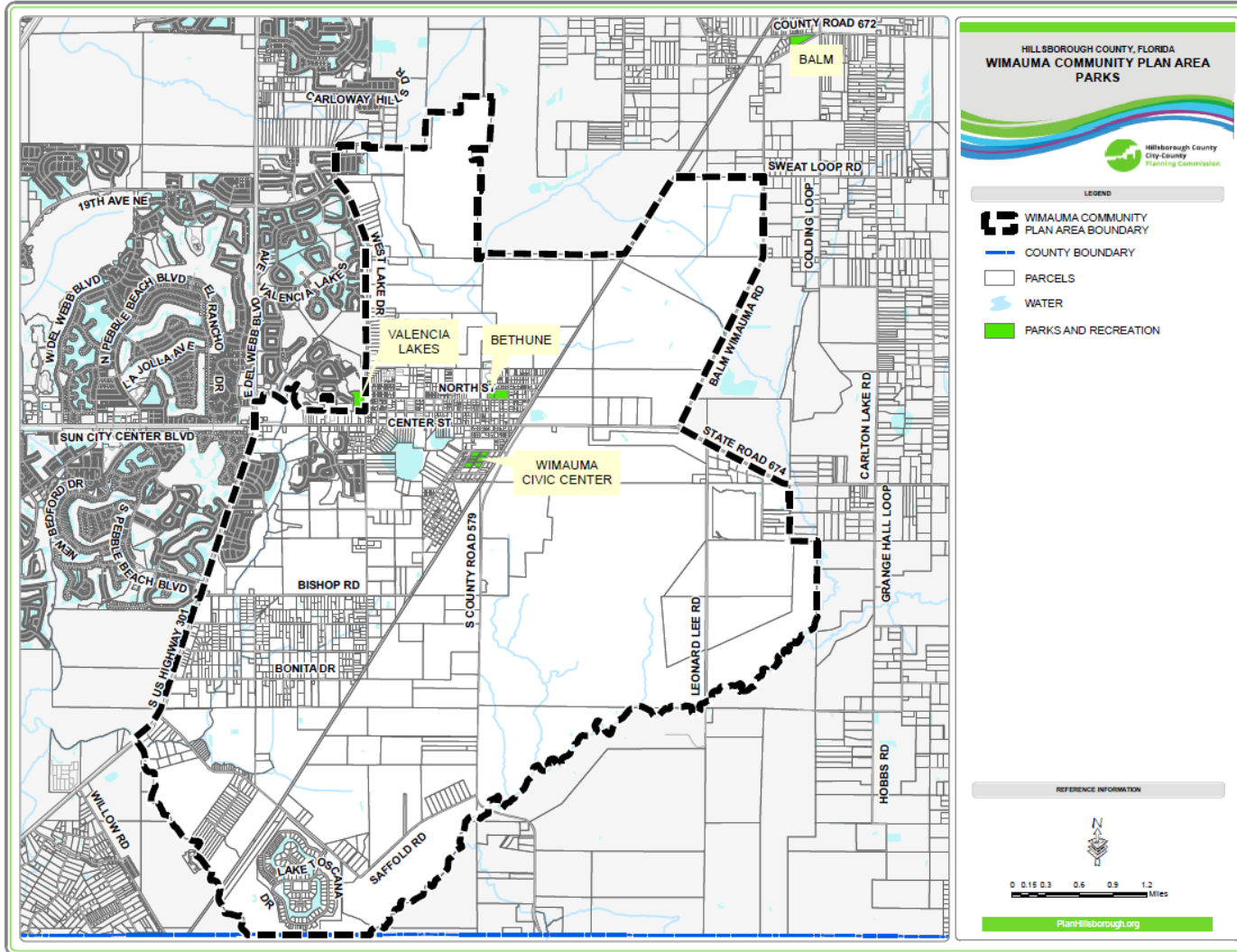
Figure 31: Community Facilities—Hospitals



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Figure 32: Community Facilities—Parks

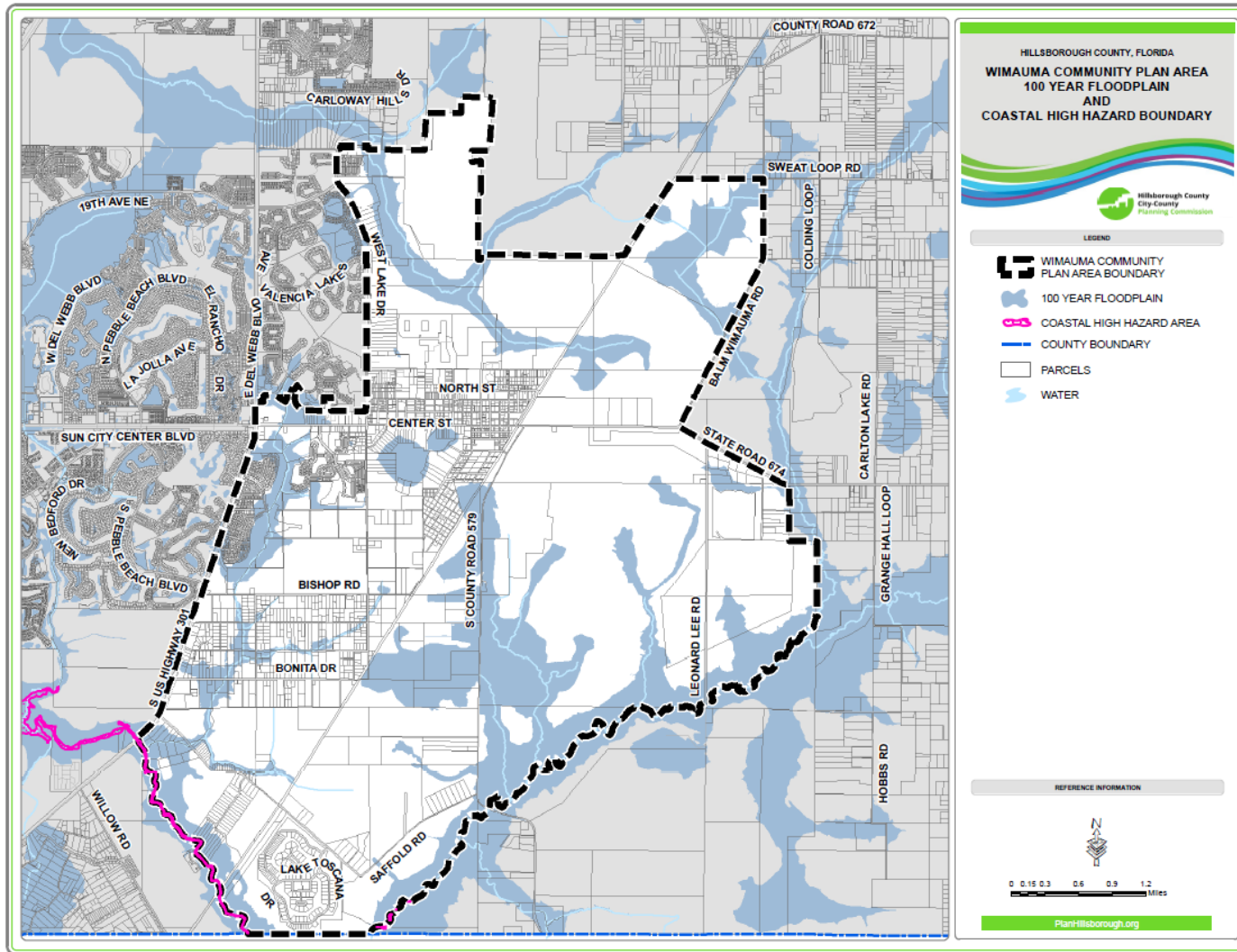




## Environmental Features

The following illustrates various environmental features in the Wimauma Community Plan Area, including 100-year floodplains, significant wildlife habitat and wetlands.

Figure 33: 100-Year Floodplain



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Figure 34: Significant Wildlife Habitat

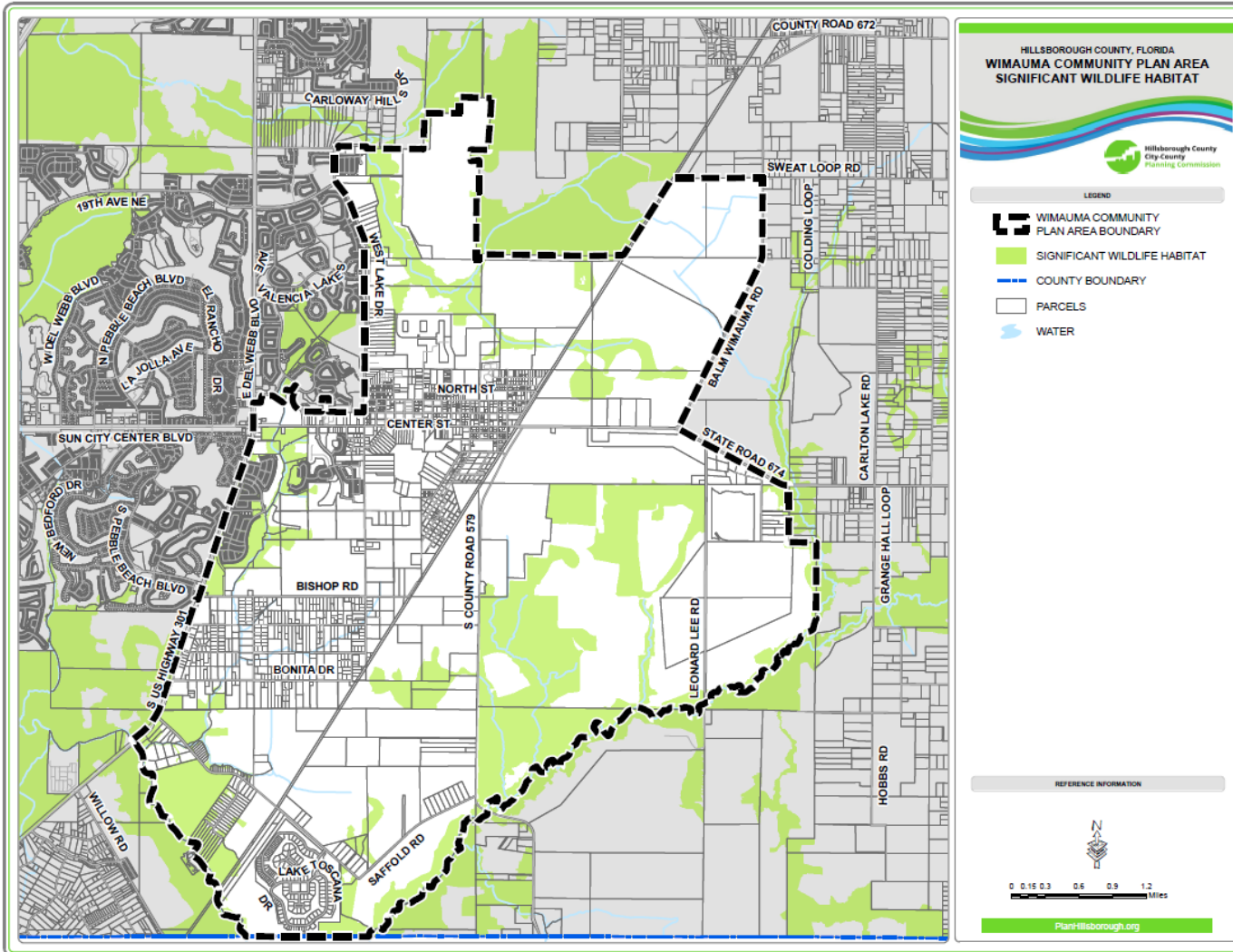
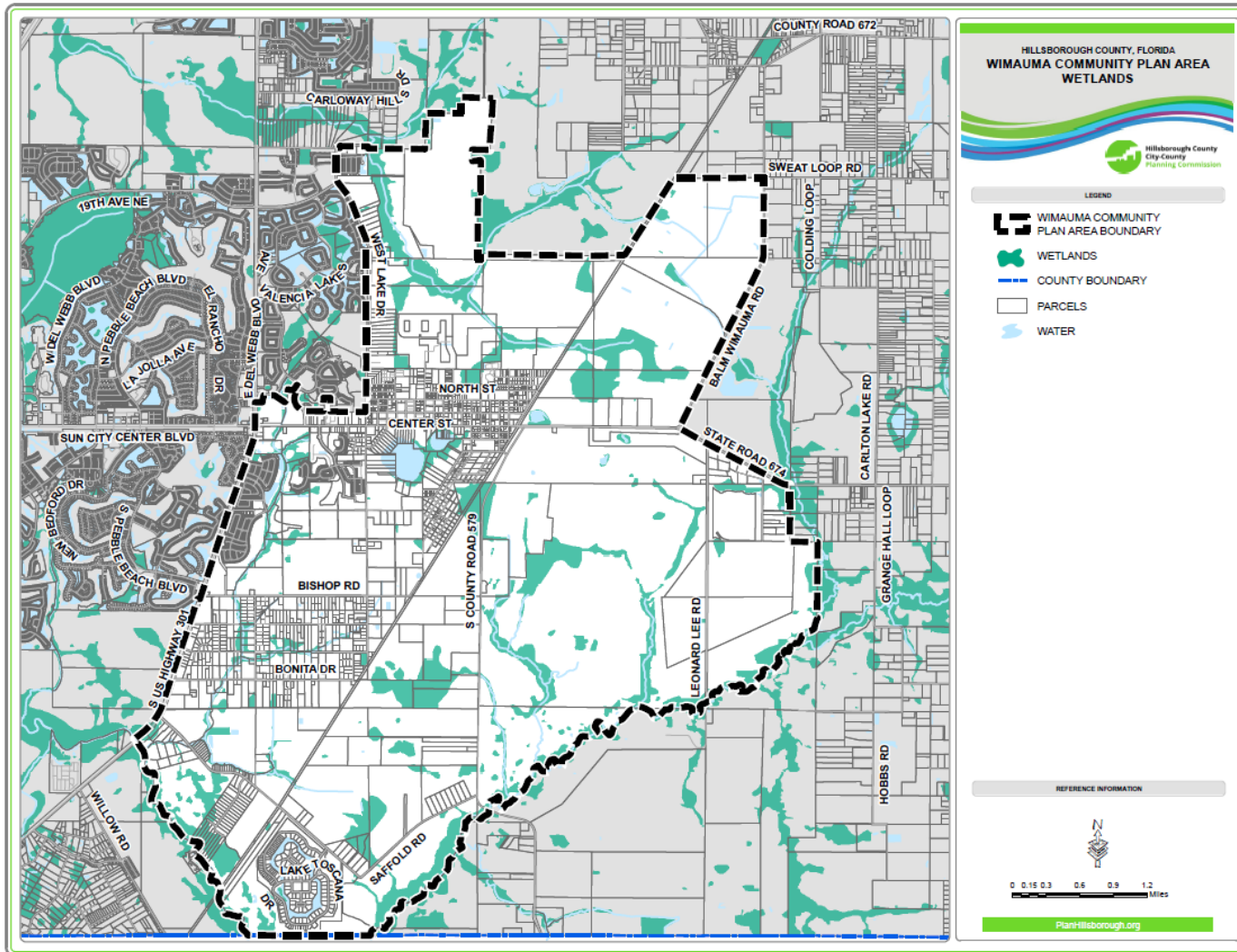


Figure 35: Wetlands



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## Communities of Concern & Unemployment

The following illustrates “Communities of Concern”, which is defined by Hillsborough County as those areas that have a population at least one standard deviation above the mean for the following populations:

- Minority
- Low-income
- Zero Vehicle
- Youth under 18
- Elderly 65+
- Limited English Proficiency, and/or
- Persons with Disabilities.

Areas meeting at least two of these metrics are identified by Hillsborough County as “Communities of Concern”. Figure 36 illustrates Communities of Concern and Figure 37 illustrates Unemployment by Census Tract.

Figure 36: Communities of Concern

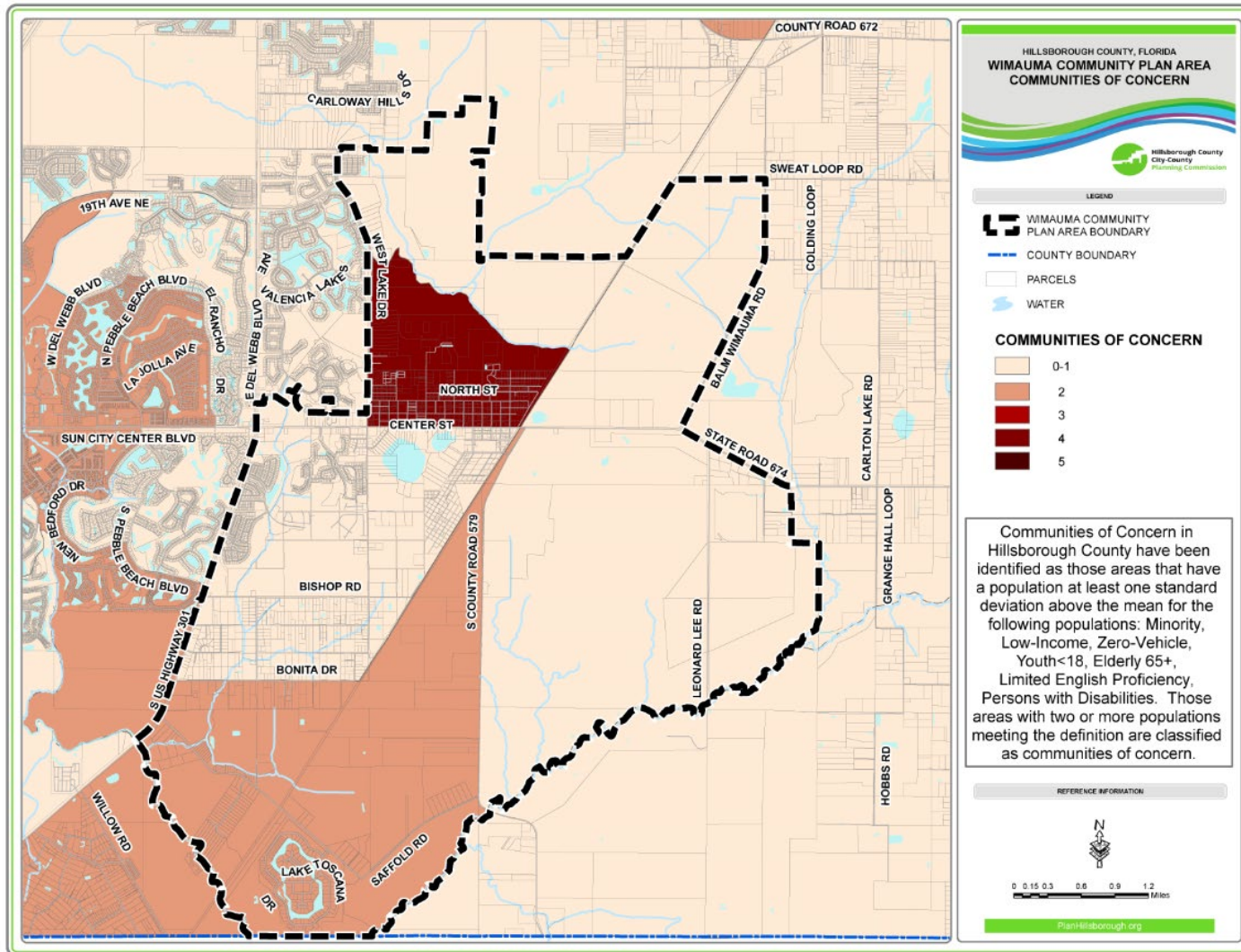
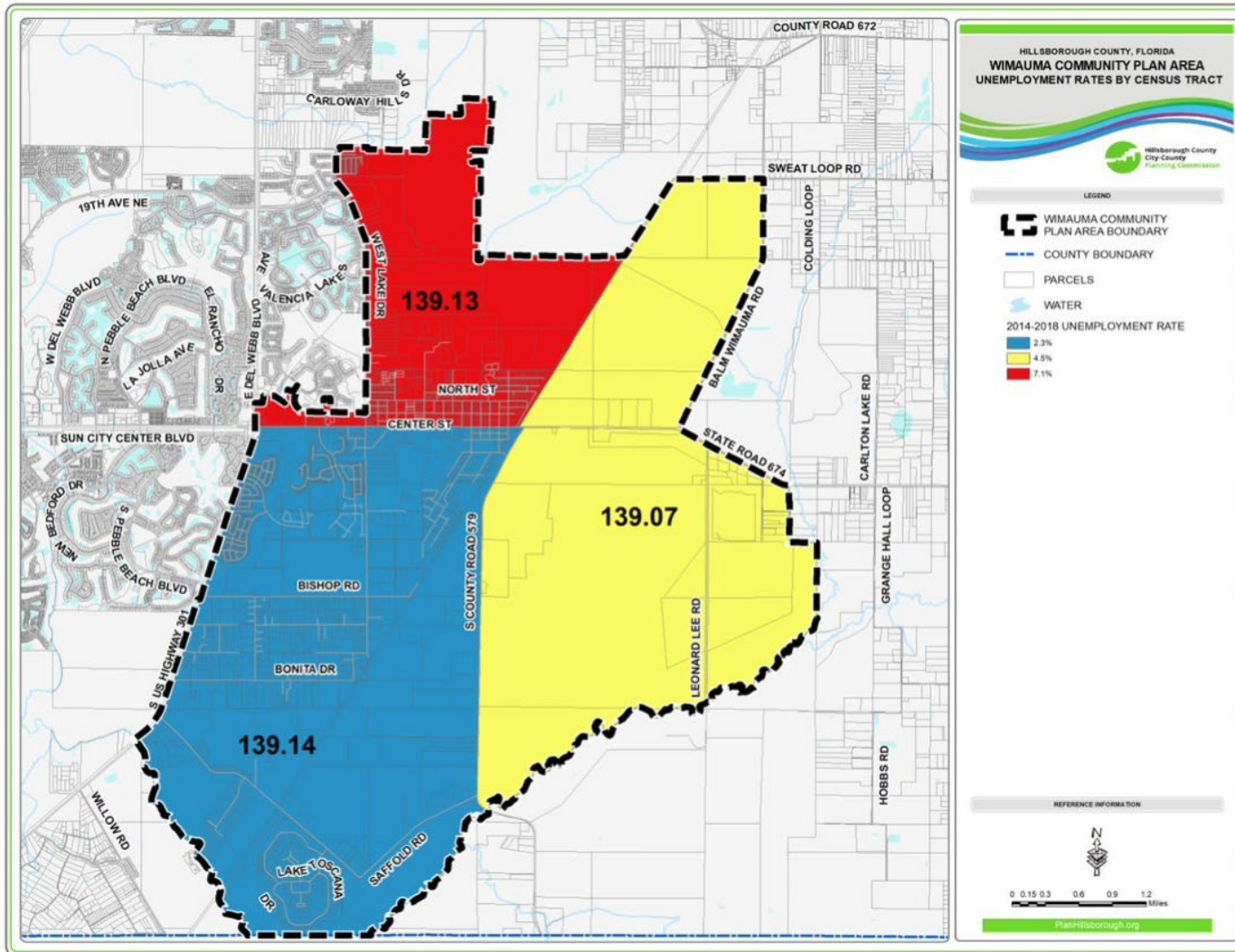


Figure 37: Unemployment Rates by Census Tract



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