2045 Population and Job Growth: Update

MAY 7, 2019

Plan Hillsborough
Why look at Population Projections?

- A tool to inform future decisions
- Context to planning decisions
  - Inform the plan but are not the Plan
- Frame investments in infrastructure
Joe Henderson: People keep moving to Tampa. What kind of place are they going to find?

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

Tampa Bay Times 4/25/19

Hillsborough County grew by 27,000 residents last year

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

We just need to do it properly.”
We can influence the future...

- What will Hillsborough County look like in 30 years?
- Where will we grow?
- How will we grow?
- What does this mean for:
  - Transportation
  - Jobs
  - Housing
  - Infrastructure
  - Schools
### Guiding Principles for How We Grow

**ADOPTED JULY 29, 2015**

<table>
<thead>
<tr>
<th>Category</th>
<th>Principles</th>
</tr>
</thead>
</table>
| **Quality of Life**       | • Respect diversity of Urban, Suburban, Semi-Rural, and Rural choices. (i.e. Form Based Code can help deliver these lifestyle options)  
                            • Preserve environmentally significant land  
                            • Maintain viable agricultural lands                                               |
| **Fiscal Sustainability** | • Prioritize limited resources  
                            • Leverage private capital investments  
                            • Capitalize on existing infrastructure  
                            • Provide alternative mobility options  
                            • Use the right tools for the right setting (i.e. Special Assessment District) |
| **Economic Prosperity**   | • Protect competitive sites for future job creation  
                            • Incentivize economic objectives and affordable housing  
                            • Link infrastructure spending to private capital investment  
                            • Use the right tools for the right setting                                          |
| **Responsible Growth**    | • Recognize the difference between stable and transition areas  
                            • Redevelop declining commercial and industrial areas  
                            • Structure mobility fee to incentivize a productive development pattern  
                            • Use the right tools for the right setting (i.e. TDR Program)                      |
| **Consistency of Action** | • Provide certainty for community and development industry  
                            • Align programs and investment decisions  
                            • Link capital improvement program, land use, and development standards            |
Projecting Hillsborough County’s population

• Bureau of Economic and Business Research (BEHR)
  ▪ Medium Level Projection

• Takes into account:
  ▪ Birth rates
  ▪ Death rates
  ▪ In and out migration
What does the future look like?

2045 Population and Job Growth

<table>
<thead>
<tr>
<th>Year</th>
<th>Population</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>830,900</td>
<td>1,293,200</td>
</tr>
<tr>
<td>2020</td>
<td>935,900</td>
<td>1,466,900</td>
</tr>
<tr>
<td>2025</td>
<td>1,015,400</td>
<td>1,602,900</td>
</tr>
<tr>
<td>2030</td>
<td>1,083,700</td>
<td>1,722,900</td>
</tr>
<tr>
<td>2035</td>
<td>1,139,600</td>
<td>1,824,900</td>
</tr>
<tr>
<td>2040</td>
<td>1,190,300</td>
<td>1,919,900</td>
</tr>
<tr>
<td>2045</td>
<td>1,235,300</td>
<td>2,007,100</td>
</tr>
</tbody>
</table>
What does the future look like?

714,000 more people
404,400 more jobs
Trend analysis and planning assumptions

Land use

- Residential Growth Trends
  - Single-Family Residential Lot Size

- Employment Growth Trends
  - Non-Residential Intensity

Development Activity

Policy

- Future Land Use Intensity

Demographics

- Population and Demographic Trends
  - Age Cohorts by Housing Type

2045 Population and Job Growth
Comparison of Average Allowable Densities to Average Developed Densities

- **Tampa**
  - Average Allowable Density: 19.0
  - Average Developed Density: 5.1

- **Temple Terrace**
  - Average Allowable Density: 10.6
  - Average Developed Density: 3.2

- **Plant City**
  - Average Allowable Density: 10.5
  - Average Developed Density: 2.6

- **Unincorporated**
  - Average Allowable Density: 6.9
  - Average Developed Density: 3.1
Comparison of Average Allowable Floor Area Ratios to Average Developed Floor Area Ratios

- Tampa: Average Developed Floor Area Ratio = 0.14, Average Allowed Floor Area Ratio = 0.93
- Temple Terrace: Average Developed Floor Area Ratio = 0.09, Average Allowed Floor Area Ratio = 0.80
- Plant City: Average Developed Floor Area Ratio = 0.09, Average Allowed Floor Area Ratio = 0.41
- Unincorporated: Average Developed Floor Area Ratio = 0.09, Average Allowed Floor Area Ratio = 0.36
Land for Future Development and Redevelopment

49,600 acres

Vacant, developable and redevelopable land within the Urban Services Area and 3 Cities.
If we continue current trends, we are reaching “Buildout”

Approximate Buildout of USA & Cities

<table>
<thead>
<tr>
<th>Year</th>
<th>Population</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>1,293,000</td>
<td>830,000</td>
</tr>
<tr>
<td>2020</td>
<td>1,467,000</td>
<td>930,000</td>
</tr>
<tr>
<td>2025</td>
<td>1,603,000</td>
<td>1,007,000</td>
</tr>
<tr>
<td>2030</td>
<td>1,723,000</td>
<td>1,075,000</td>
</tr>
<tr>
<td>2035</td>
<td>1,825,000</td>
<td>1,133,000</td>
</tr>
<tr>
<td>2040</td>
<td>1,920,000</td>
<td>1,186,000</td>
</tr>
<tr>
<td>2045</td>
<td>2,007,000</td>
<td>1,236,000</td>
</tr>
</tbody>
</table>
How will we respond?
We have options...
Trend Scenario

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

Rapid bus lanes on I-275

Tolled express lanes

Expansion of USA to accommodate population and employment growth
Trend Scenario

- **25,800** acres of impervious surface
- **79 MGD** of water demand
- **2,700** miles of new streets
- **100,000** new homes built outside of the Urban Service Area
Belt and Boulevard Scenario

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

- **21,900** acres of impervious surface
- **68 MGD** of water demand
- **2,140** miles of new streets
- **70,000** new homes built outside of the Urban Service Area
Transit Oriented Scenario

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

![Diagram with labels for Light rail service, Statewide rail connection, Growth focused along rail lines, Rapid bus lanes, and High-speed ferry.](image)
Transit Oriented Scenario

- 21,300 acres of impervious surface
- 68 MGD of water demand
- 2,320 miles of new streets
- 57,000 new homes built outside of the Urban Service Area
Proposed Hybrid Scenario
Guidance for the 2045 Plan
Proposed Hybrid Scenario

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

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

- Relies on transit investment to guide growth.
Proposed Hybrid Growth
Proposed Hybrid Growth

- Maximizing the remaining vacant land in the Urban Service Area and Cities

- Greenfield = 303,600 people
Proposed Hybrid Growth

• Focus on redevelopment and transit oriented development within the Cities and Urban Service Area

• Greenfield = 303,600 people

• Redevelopment and TOD = 244,600 people
Proposed Hybrid Station Areas

- Express lanes
- Express bus
- Fixed Guideway Transit
- Intercity rail
- Ferry
Transit Oriented Development

Within Station Areas
- New Residents: 156,900
- New Jobs: 147,700

Outside of Station Areas
- New Residents: 256,100
- New Jobs: 555,400

1 out of 4 new residents
1 out of 3 new jobs
Proposed Hybrid Growth

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

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

- Consider strategic expansion areas

- Greenfield = 303,600 people
- Redevelopment = 244,600 people
- RP-2/WV-2 Buildout = 13,800 people
- Expansion Area:
  - Plant City = 31,500 people
  - I-4 = 34,700 people
Proposed Hybrid Growth

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

- Hillsborough County: 884,600 (Existing), 457,800 (Future 2045)
- Tampa: 347,900 (Existing), 212,300 (Future 2045)
- Temple Terrace: 3,300 (Existing), 24,800 (Future 2045)
- Plant City: 37,900 (Existing), 55,500 (Future 2045)
Employment Growth by Jurisdiction

Hillsborough County: 171,600 employees
Tampa: 204,700 employees
Temple Terrace: 1,900 employees
Plant City: 20,500 employees

Future (2045)
Next Steps

• Are these choices leading to the desired outcomes?
  ▪ Different policy directions = different assumptions and outcomes

• Opportunity to shape the future through plan policy and investment decisions
  ▪ Update of Comprehensive Plan and Long Range Transportation Plan
  ▪ School and Facilities Planning

• Utilize this tool every five years to see how things are changing