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2018 Growth
Trends Report

2018

Published 4/18/2018

Nassau County, FL Growth Trends Report



NASSAU COUNTY
DEPARTMENT OF PLANNING
AND ECONOMIC OPPORTUNITY
FLORIDA

Context Statement

As Nassau County enters an era of transition we, collectively, have been granted an opportunity that most will never have. An opportunity to actively craft our future. The question is, what will we do with the opportunity?

Will we as a community commit to governance through dynamic collaboration? Will we place a priority on cultivating lasting public value? Will we put aside our differences in the spirit of developing strong and active networks? Will we proactively engage the full spectrum of citizens? Will we commit, with vigor, to build broad consensus on key issues? Will we maintain a proper perspective in light of our commonalities and shared goals within the context of our local community?

No matter how different we are, we share one overarching similarity, a desire to create a vibrant and dynamic community that provides a high quality-of-life and quality-of-place for our families and ourselves. The type of community that inspires connections with the natural and built environment. A community that promotes day-to-day social engagement and interpersonal connections amongst community members. A community that facilitates the creation of places that are not only beautiful in form but functional for day-to-day life. A community that prioritizes a generational approach to securing the unique character of Nassau County.

While we may disagree as to what constitutes an acceptable quality-of-life threshold or the proper means of ensuring the historic character of our communities are preserved, there are certain quality-of-life characteristics that are universal – good schools, quality public infrastructure, access to healthcare, entertainment, recreation, and nature, availability of high-wage jobs, fiscal stability and security, and most of all, a sense of place – a sense that you exist in a place that is worth caring about. A place that is worth your personal investment of time, energy and capital. A place you are proud to call home and where you and your family feel secure.

We must make planning, policy and design decisions that put people at the center of the equation. We must establish a people first agenda, an agenda that places a priority on quality-of-life and generational sustainability – an agenda that places value in maintaining the unique character of Nassau County so that our children's children will know the place we have all come to love.

This report provides twelve tools that will assist in the decision making process as Nassau County moves into this exciting future that we have the power to shape. The provided twelve tools are not intended to be viewed as a comprehensive, all-inclusive or static list, but rather a set of practical tools Nassau County has the current capacity to implement. To paraphrase Charles Lindblom, real change, lasting change is not revolutionary, but rather evolutionary. People in general have a propensity to treat the symptoms of a problem and ignore the root cause of an issue. Ultimately, these tools are intended to address the root cause of many of the challenges facing Nassau County over the course of time – in an evolutionary manner. As such, there is no illusion these efforts will be swift, result in instant gratification or address all of our issues. However, the path towards tomorrow starts today. As such, I offer the following:

Embrace the opportunity, appreciate the challenge, be open to innovation and strive to maintain proper perspective.



Taco E. Pope, AICP
Director, Nassau County, FL
Dept. of Planning & Economic Opportunity

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EXISTING CONDITIONS

Population & Demographics

Full-time Population Estimate 2017(BEBR): 80,456⁸

(BEBR estimates 80,456 persons. The US Census Bureau estimates 82,721 persons for 2017)

Annual Tourists (Amelia Island): 652,100¹⁰

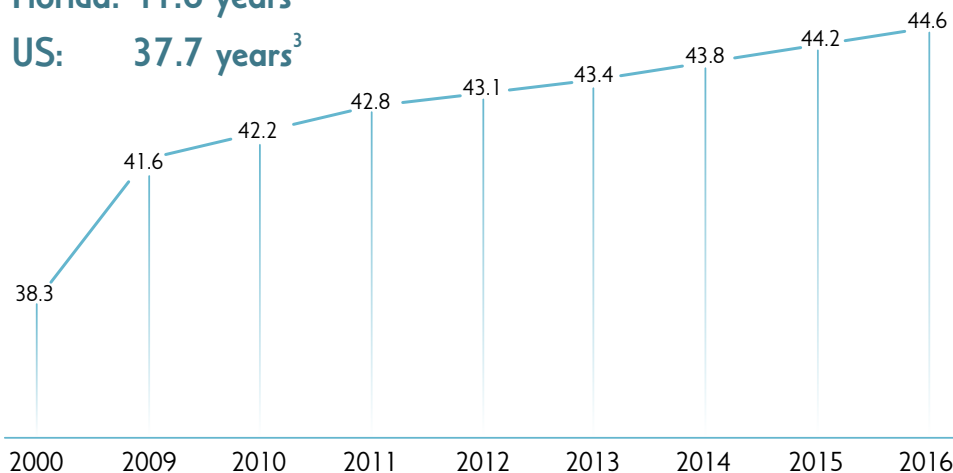
(Tourism on Amelia Island has increased by 51% since 2011, 432,100)

Footnote references found on back page

Median Age 2016 Nassau: 44.6 years³

Median Age 2016 Florida: 41.6 years³

Median Age 2016 US: 37.7 years³



GRAPH 1. AGE IN NASSAU COUNTY FROM 2000-2016^{13, 14}

2016 Nassau County

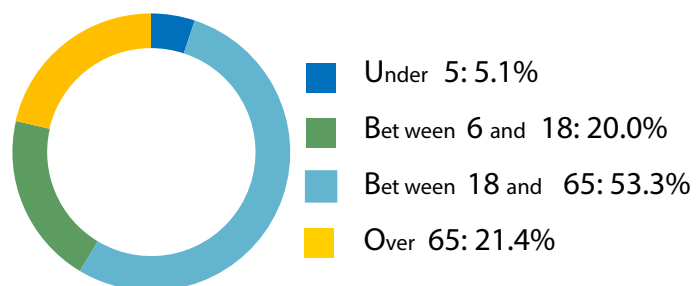
White: 87.5%³

Black or African American: 6.2%³

Hispanic or Latino: 3.8%³

Asian: 1%³

Other: 1.5%³



GRAPH 2. AGE IN NASSAU COUNTY BY % OF POPULATION(2016)

2016 State of Florida

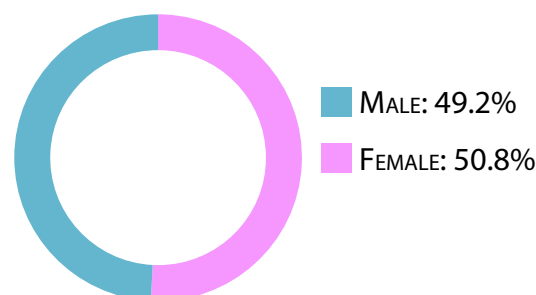
White: 55.6%³

Black or African American: 15.4%³

Hispanic or Latino: 24.1%³

Asian: 2.6%³

Other: 2.3%³

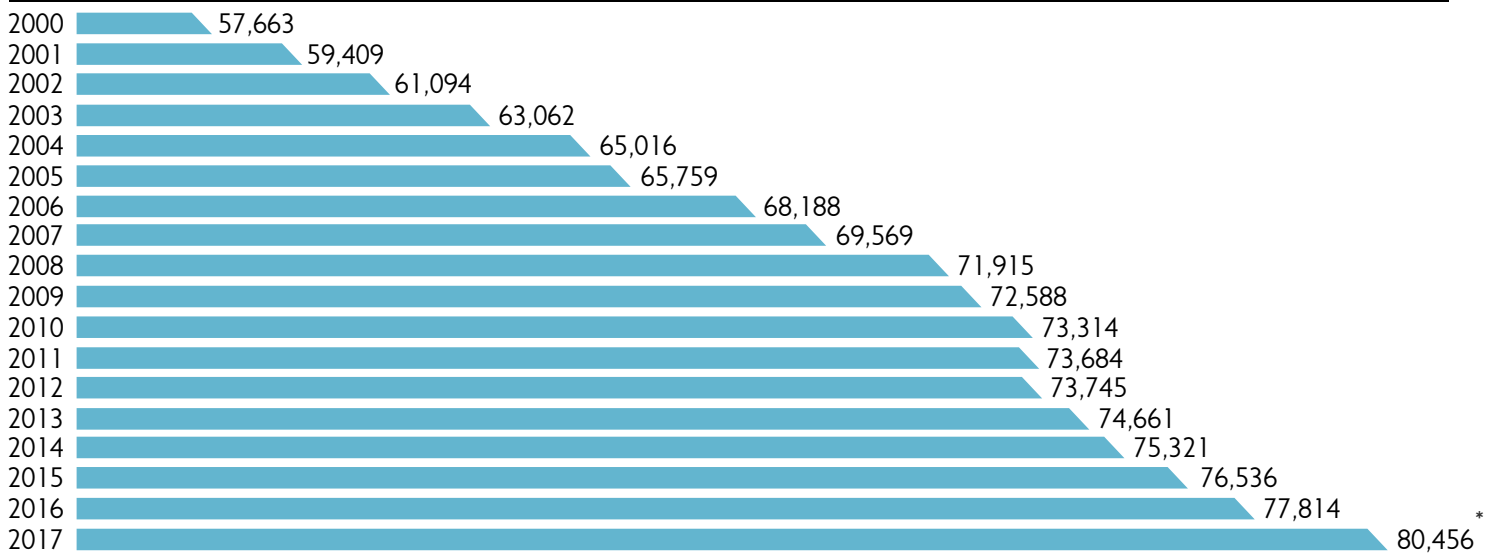


GRAPH 3. GENDER IN NASSAU COUNTY

Female 2016 Nassau: 50.8%⁴

(State of Florida is also 50.8%)

Male 2016 Nassau: 49.2%⁴

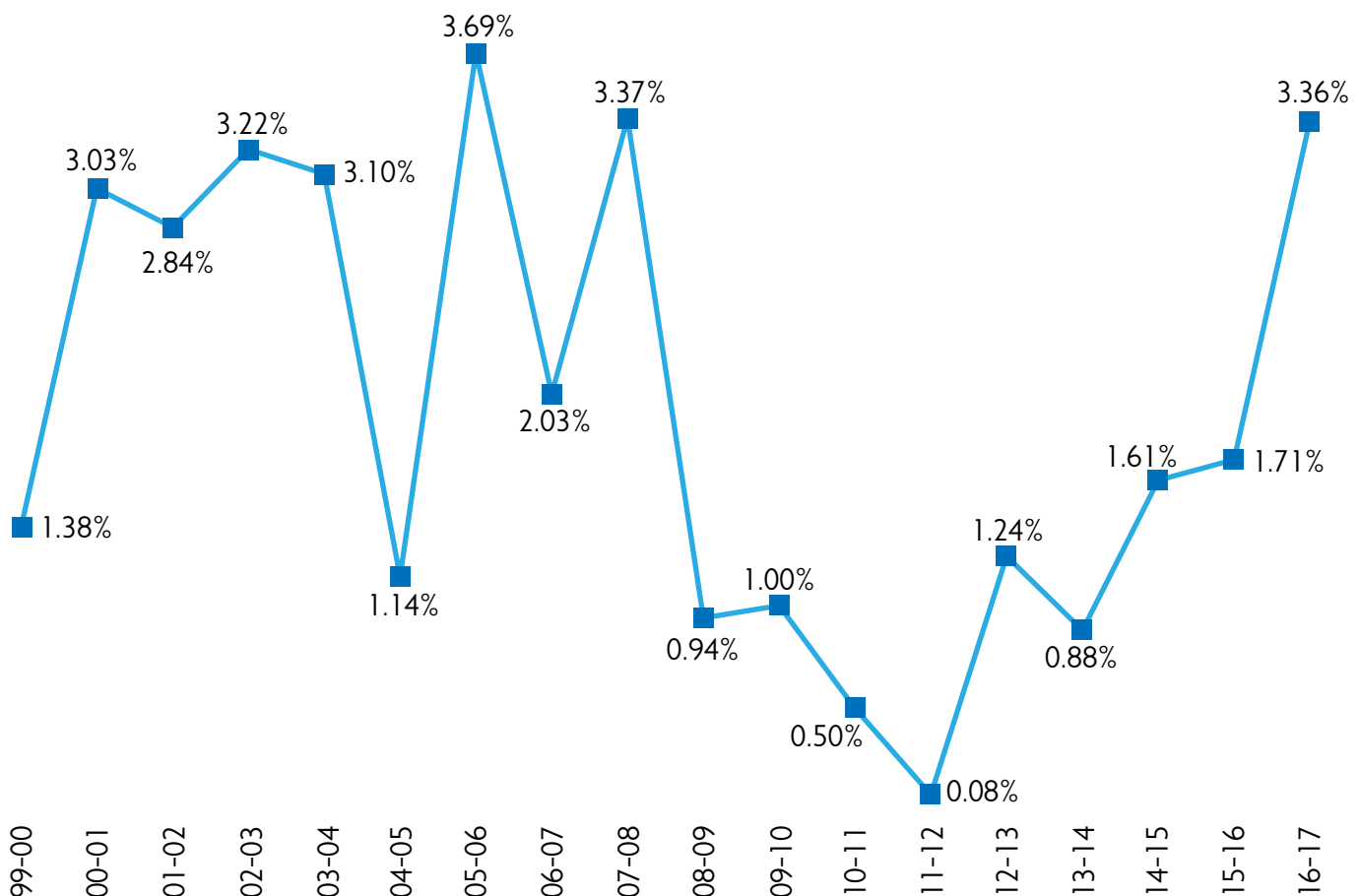


GRAPH 4. POPULATION IN NASSAU COUNTY FROM 2000-2017⁸

*80,456 persons is the population estimate from the University of Florida's Bureau of Economic and Business Research (BEER produces Florida's official state and local population estimates and projections). However, the US Census Bureau has published a population estimate for 2017 at 82,721 persons**. If using US Census Bureau's estimates Nassau experienced an astronomical 6.3% increase in population from 2016 to 2017.

**Florida DEO's Bureau of Labor Market statistics utilized US Census estimates (82,721) in the April 2018 publication of the Summary of Employment, Demographics, and Commuting Patterns for Nassau County, Florida.

See pg. 24 of this report for population projections.



GRAPH 5. ANNUAL POPULATION PERCENT CHANGE FROM 1999-2017⁸

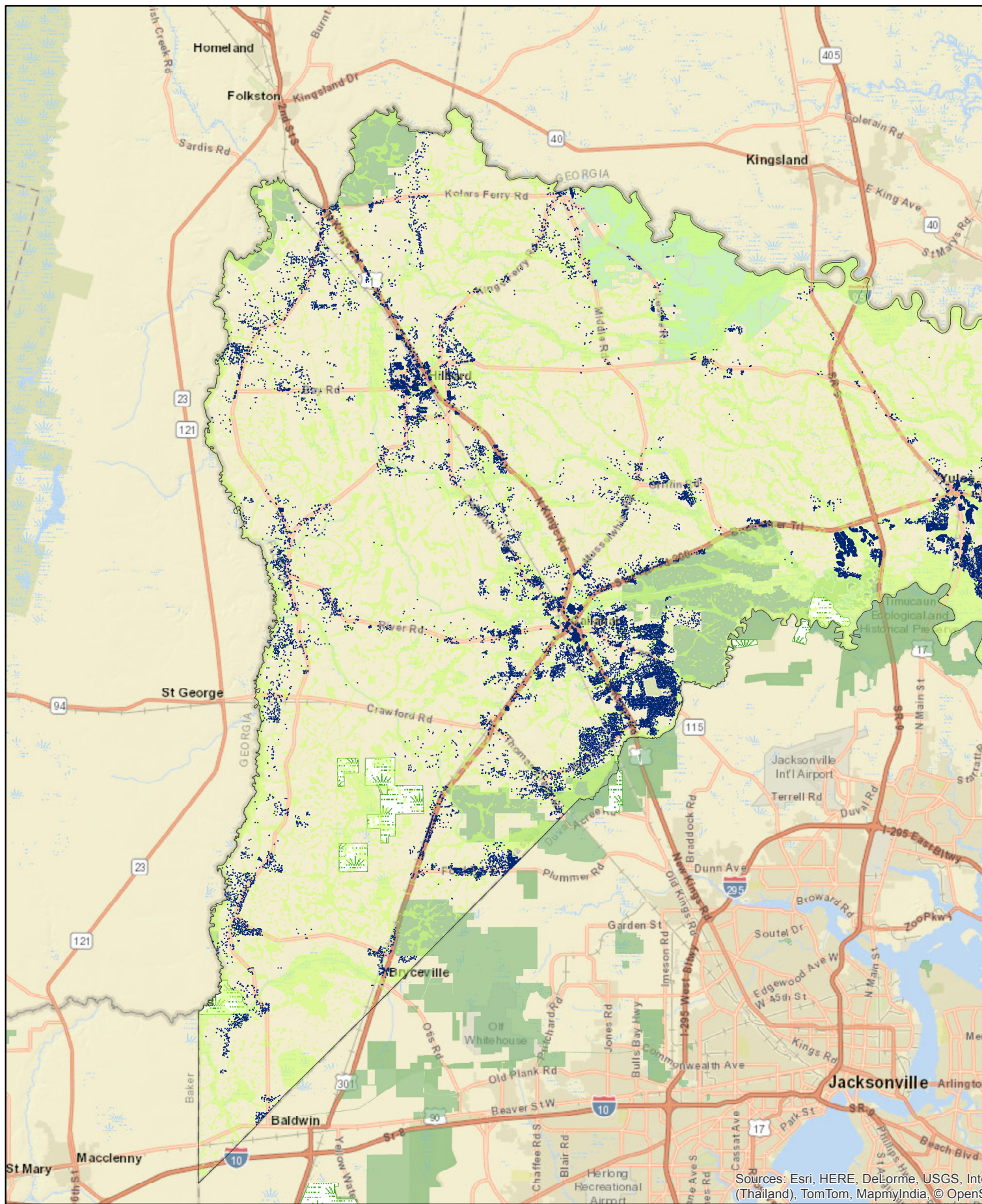


FIGURE 1. 2018 POPULATION DOT DENSITY

Population Disbursement 2017

Legend

-  Wetlands
-  White Oak Plantation Overlay
-  Mitigation Banks
-  Florida Managed Areas

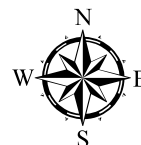
Population Density*

1 dot = 1 person

*Density disbursement is based upon 2017 parcel data. The dot-density utilizes property use codes to locate existing dwelling units illustrating the disbursement of County citizens.

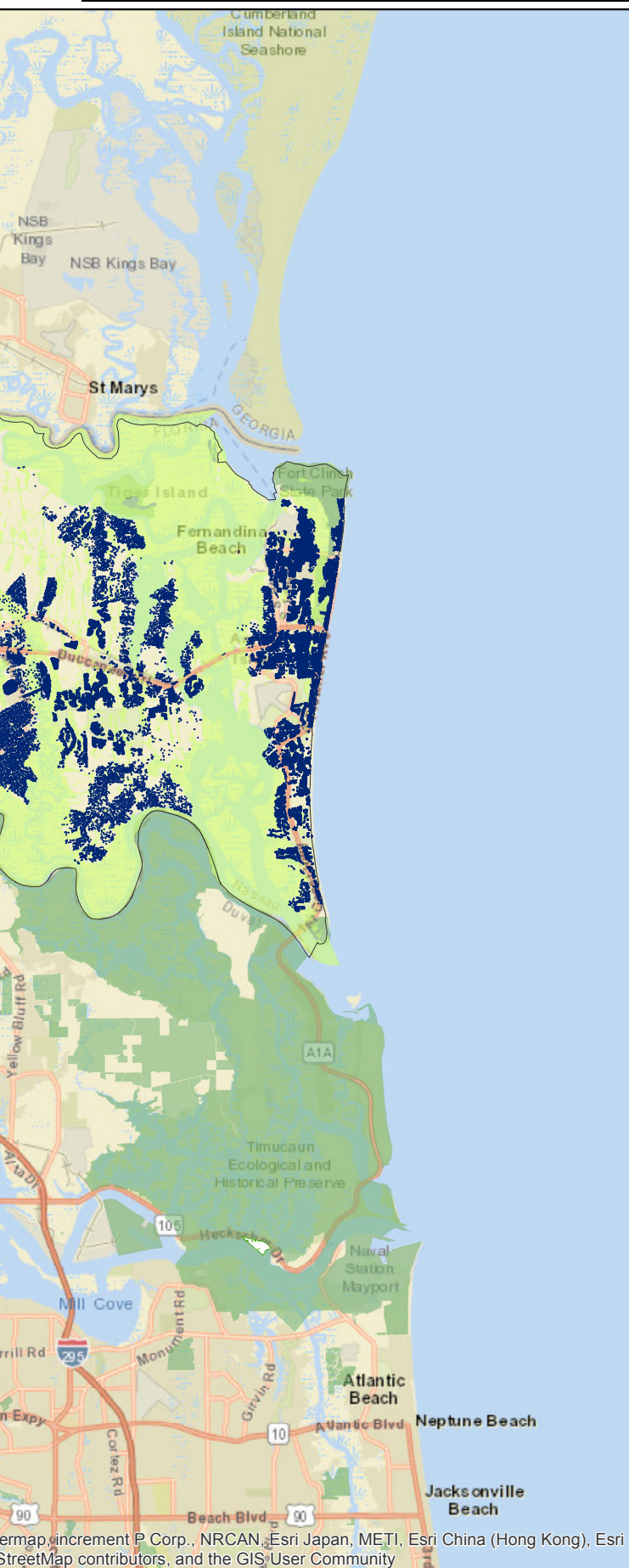


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 Miles
0 2.5 5 10



Map data: Esri, DeLorme, Garmin, Mapbox, Microsoft, OpenStreetMap contributors, Swatch, and the GIS User Community

Demographics & Employment

Median Household Income 2016 Nassau: \$59,196³

(Mean Household Income Nassau 2016: 79,482³)

Median Household Income 2016 Florida: \$48,900³

(Mean Household Income Nassau 2016: 69,936³)

Jacksonville MSA Area Median Income (AMI) 2016: \$64,400²

Per Capita Income 2016 Nassau: \$31,141³

Per Capita Income 2016 Florida: \$27,598³

Individuals Below the Poverty Level Nassau: 12.7%³

Individuals Below the Poverty Level Florida: 16.1%³

Graduation Rates Nassau:

High School: 90.9%³

Bachelor's Degree: 24.5%³

Employment Information:

30,745 number of workers living in Nassau County¹⁵

19,733 number of workers who live in Nassau County but are employed outside Nassau County¹⁵

64.2% of the workers in Nassau County are employed outside of Nassau County¹⁵

29.4 minutes is the mean travel time to work³

12,591 of the 19,733 workers who work outside Nassau work in Duval County¹⁵

19,360 is the number of total workers who are employed in Nassau County¹⁵

8,348 is the number of people who live outside Nassau County but work in Nassau County¹⁵

43.1% of those working in Nassau County live outside Nassau County¹⁵

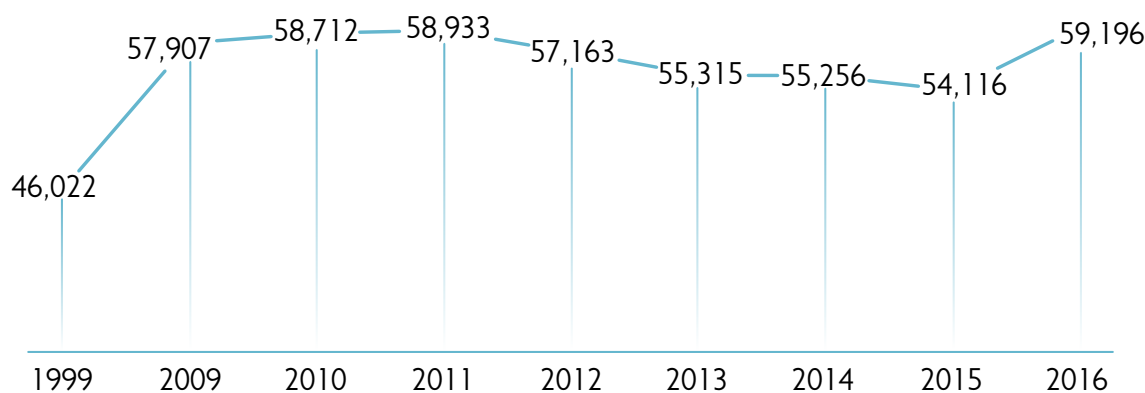
11,012 is the number of workers who live and work in Nassau County¹⁵

71% of the 11,012 workers living and working in Nassau County work in the service industry¹⁵

3.4% Unemployment Rate Nassau (Feb. 2018)¹⁵

Area Median Income: The median divides the income distribution into two equal parts: one-half of the cases falling below the median income and one-half above the median. HUD uses the median income for families in metropolitan and non-metropolitan areas to calculate income limits for eligibility in a variety of housing programs. HUD estimates the median family income for an area in the current year and adjusts that amount for different family sizes so that family incomes may be expressed as a percentage of the area median income.

Per Capita Income: The mean income computed for every man, woman, and child in a particular group including those living in group quarters. It is derived by dividing the aggregate income of a particular group by the total population in that group



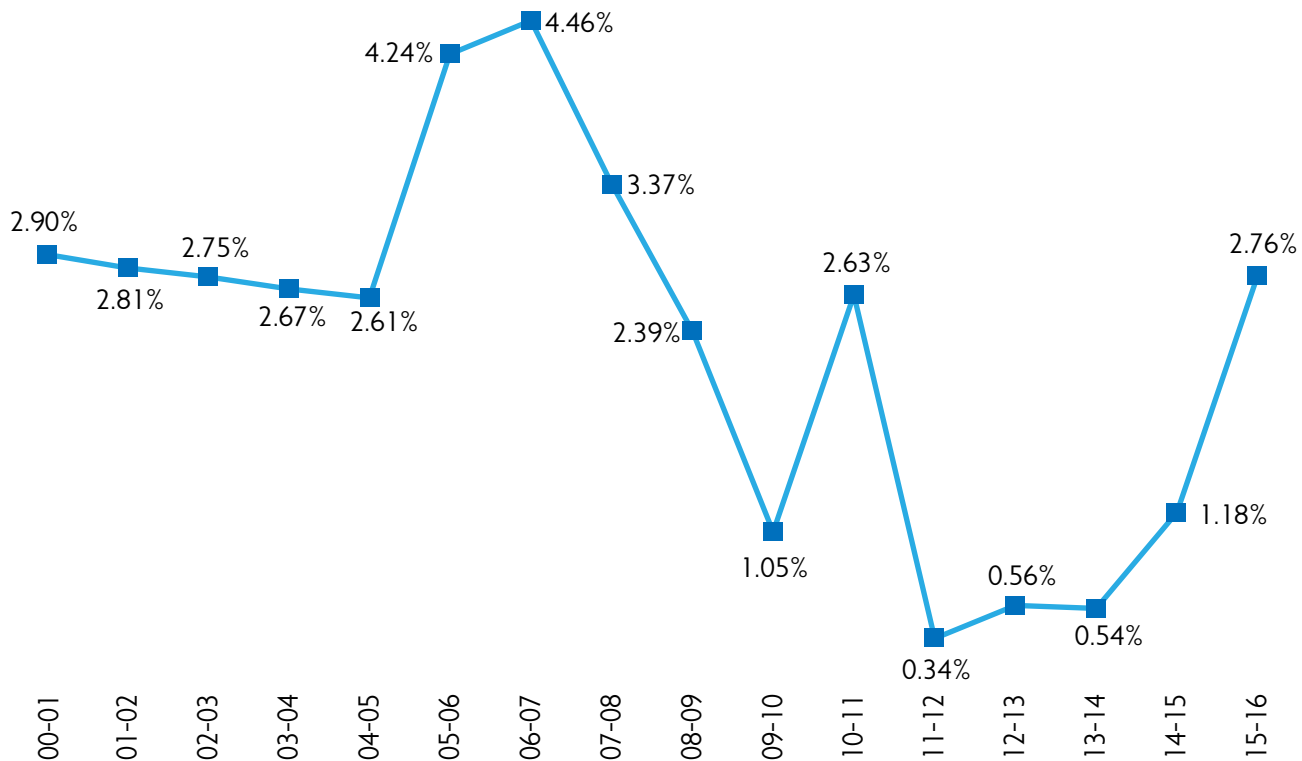
GRAPH 6. MEDIAN INCOME IN NASSAU COUNTY 1999- 2016^{13,14}

Housing

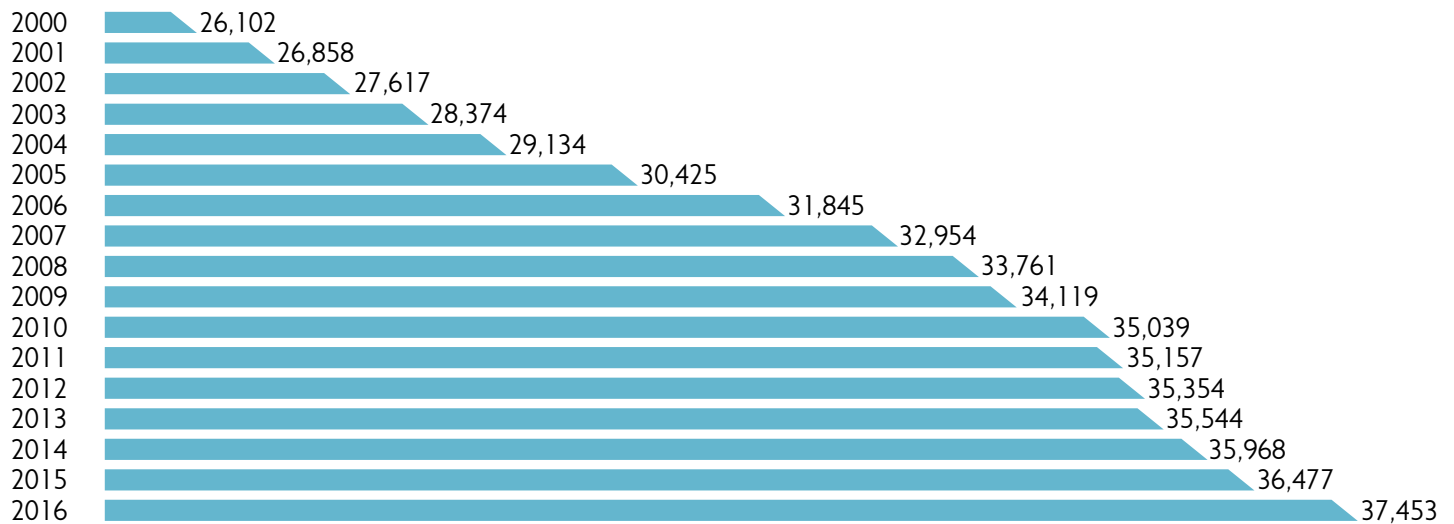
Total Housing Units: 37,453⁴

Persons Per Household: 2.62⁴

Owner-occupied Units: 76.1%⁴



GRAPH 7. PERCENT CHANGE IN TOTAL HOUSING UNITS FROM 2000-2017⁴



GRAPH 8. TOTAL HOUSING UNITS IN NASSAU COUNTY FROM 2000-2016⁴

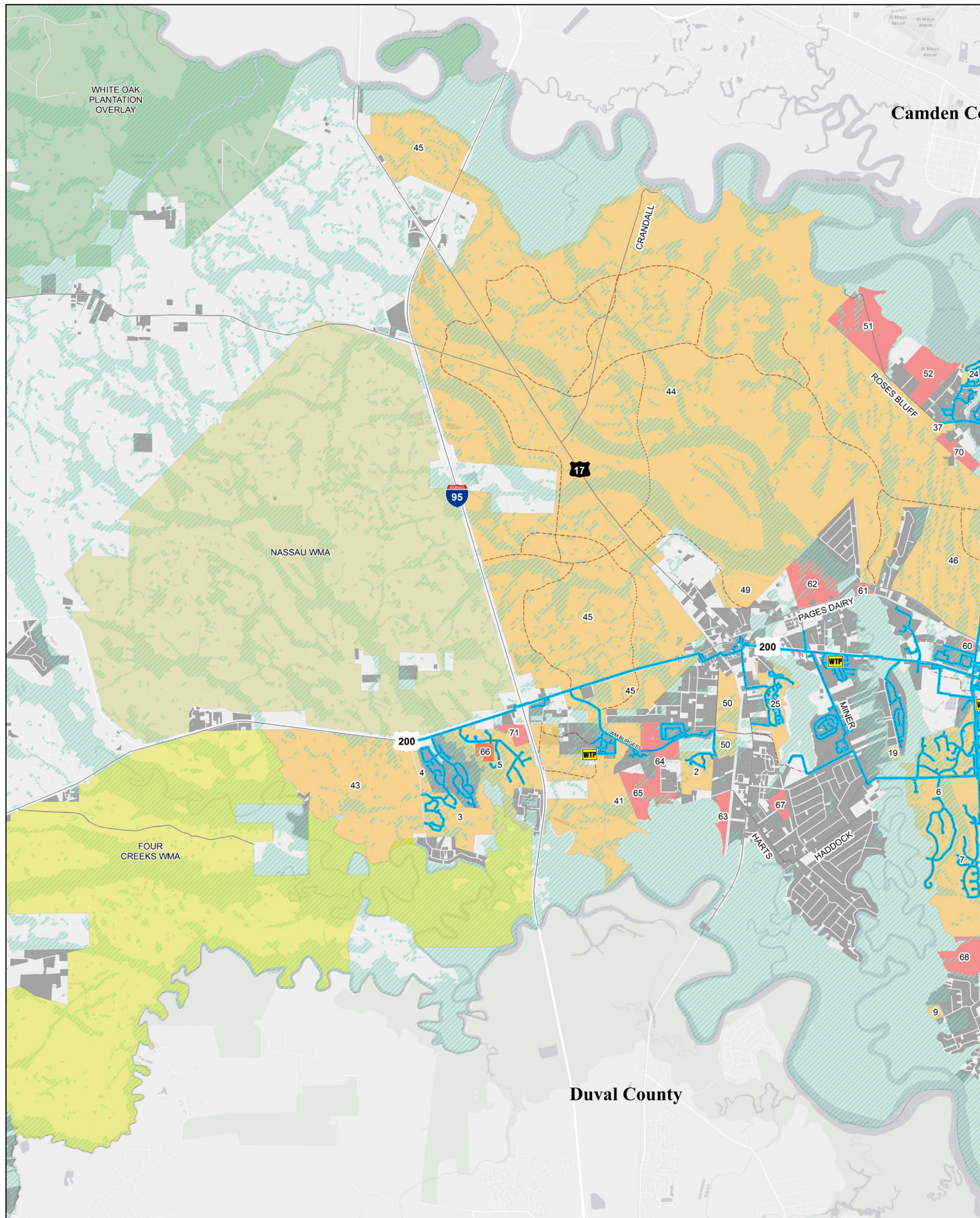


FIGURE 2. RESIDENTIAL DEVELOPMENT TRACKER











SR200/A1A - Yulee Existing Water Resources Infrastructure

Residential Development Tracking Project

Updated on: April 12, 2018

Tracked Developments* (Entitled)

ID	Development	Entitled Units	Built Units	Un-Built Units
1	Captains Pointe	20	10	10
2	Lumber Creek	318	98	241
3	River Glen	690	231	459
4	Timberland Estates	12	7	5
5	Plummers Creek	500	264	236
6	North Hampton	749	612	137
7	Hampton Lakes	749	181	568
8	Marshes @ Lanceford	62	50	12
9	Southern Creek	17	1	16
10	Flora Parke	732	554	178
11	Amelia National	749	190	559
12	Parliament Estates	4	1	3
13	Timber Lake	163	150	13
14	Harbor Concourse	138	54	84
15	Amelia Concourse	465	133	332
16	Amelia Bay Estates	39	4	35
17	Tuscany @ Marsh Lakes Condo	22	0	22
18	Heron Isles	749	636	113
19	Lofton Reserve	8	2	6
20	Brady Point Preserve	76	14	62
21	Grande Oaks @ Amelia Replat	80	37	43
22	Oysterville	5	2	3
23	Villages of Woodbridge	505	141	364
24	Watermans Bluff	142	27	115
25	The Hideaway	483	310	173
26	Northbrook	37	18	19
27	Oaks @ Bristol	52	51	1
28	Murrays Triangle	17	2	15
29	Holly Point Estates	9	1	8
30	Dockside on Christopher Creek Replat	4	0	4
31	Sheffield Bluff	17	4	13
32	Blackheath Park	22	0	22
33	Lanceford	40	22	18
34	Oyster Bay	399	163	236
35	Blackrock Hammock	48	31	17
36	Jordans Cove	8	3	5
37	Creekside	68	55	13
38	Piney Plantation (Proposed)	26	0	26
39	Sandy Pointe Preserve	121	0	121
40	Woodbrier	107	45	62
41	Cook Property/Riverpoint (Proposed)	748	0	748
42	Blackrock Park	82	2	80
43	Three Rivers DRI	3,200	0	3,200
44	ENCPA*(Sector plan less approved DSAPs)	18,087	0	18,087
45	ENCPA Employment Center DSAP	4,038	0	4,038
46	ENCPA Chester Road DSAP	1,875	0	1,875
47	Creekstone	46	0	46
48	Barnwell Manor	208	0	208
49	Pages Dairy Road Planning Area	0	0	0
50	Nassau Crossing	800	0	800
Totals:		37,536	4,106	33,451

-  Water Treatment Plant*
-  Water Main*
-  Future Roads
-  WHITE OAK OVERLAY
-  FOUR CREEKS WMA
-  NASSAU WMA
-  NWI - Wetlands
-  Potential Development
-  Tracked Developments
-  Existing Development

*JEA Data is from 2017.

Potential Development Parcels**

ID	Acreage	Approximate Wetlands	FLUM	Approximate Units
51	371	66	AGR	305
52	191	5	LDR	372
53	213	56	MDR	399
54	65	13	LDR/MDR	131
55	210	88	LDR	244
56	123	61	LDR	124
57	108	9	LDR	198
58	46	19	LDR	54
59	155	22	LDR	266
60	28	14	IND	210
61	17	3	MDR	42
62	203	90	LDR	230
63	58	0	MDR	174
64	170	33	AGR	137
65	116	23	AGR	93
66	35	8	LDR	54
67	41	0	MDR	123
68	152	33	LDR	238
69	41	1	LDR	80
70	61	3	LDR	116
71	50	7	LDR/COM	430
72	16	10	MDR	18
		Totals:		4,038

For the purpose of correlating dwelling units to population, according to the 2010 US Census, there are 2.53 persons per household in Nassau County.

*Tracked Developments are those which are entitled by a Development Order [or are in the review process] but not more than 85% built-out.

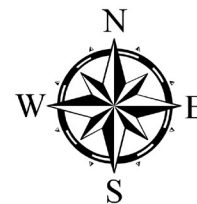
**Potential Development Parcels are those parcels on which projects have been discussed with this Office or, are situated in such a manner that makes residential development likely. The Potential Dwelling Units calculation is an approximation derived from acreage, wetlands (NWI) and FLUM designation. In no way does this information substitute for a density determination or entitle these properties to any density level beyond that provided for in the 2030 Comprehensive Plan and Land Development Code. This data shall not be relied upon for making business decision or substitute for adequate due diligence.

***Number of constructed homes in a given development is based upon the available records of the Nassau County Building Department for Certificates of Occupancy issued.

Published by:

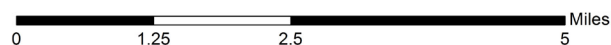


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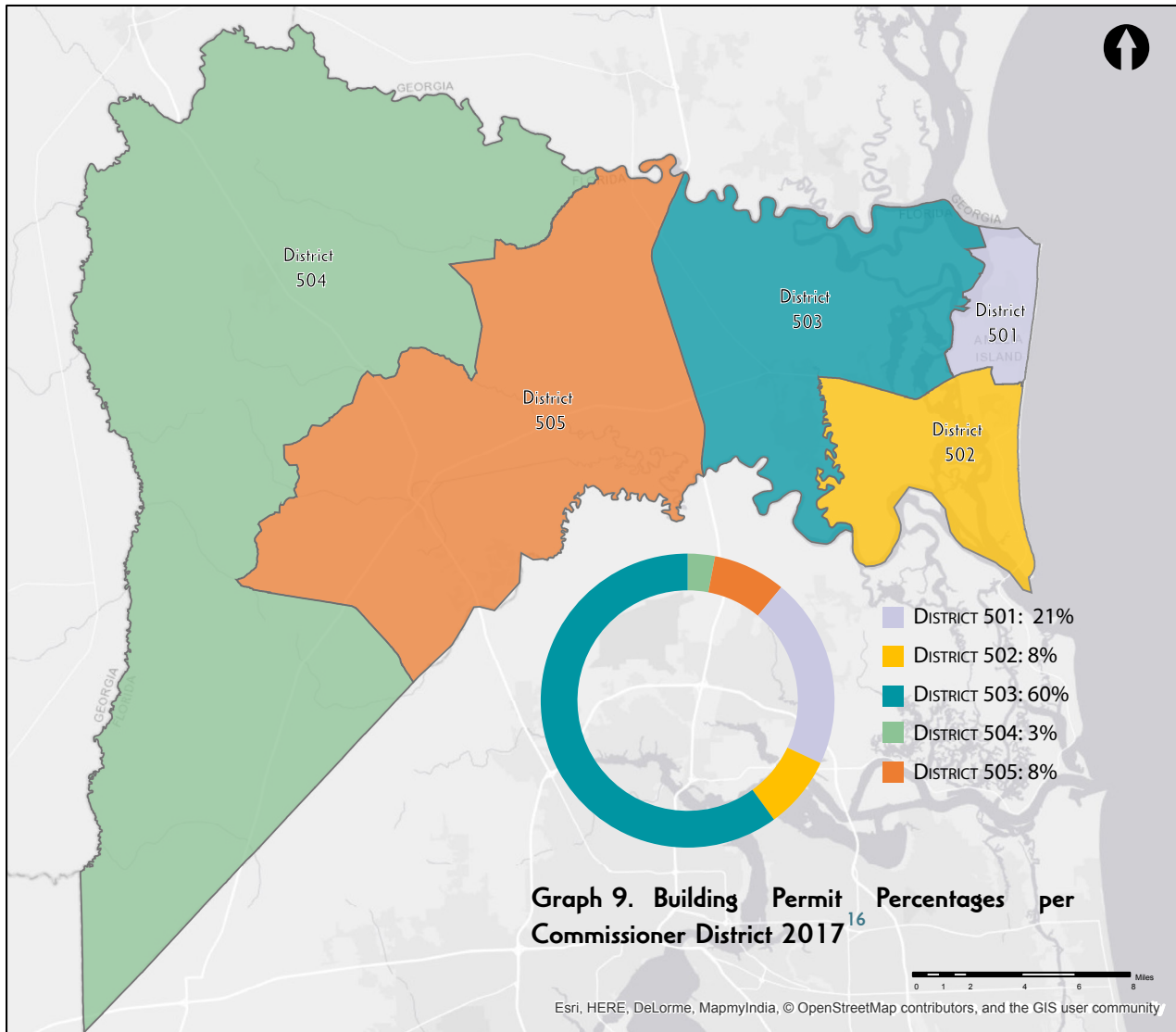
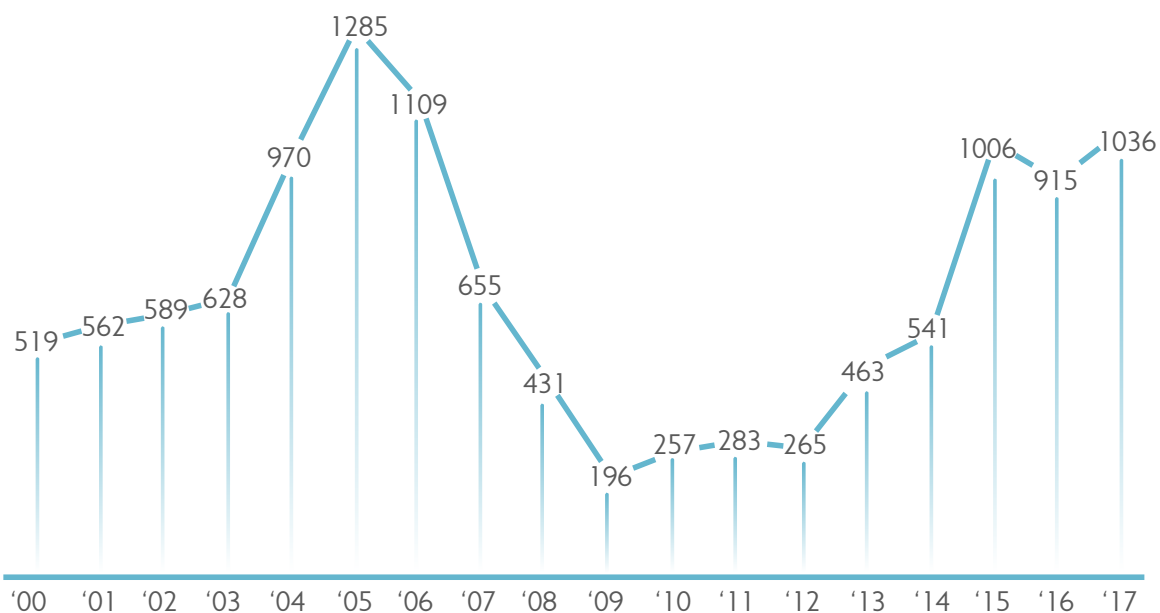


FIGURE 3. NASSAU COUNTY COMMISSIONER DISTRICTS



GRAPH 10. BUILDING PERMITS FOR NEW RESIDENTIAL DWELLING UNITS IN NASSAU COUNTY FROM 2000 TO 2017¹⁶

PLATS APPROVED IN 2017-2018 (SF = SINGLE FAMILY LOTS/UNITS):

Blackrock Park Phase II:	55 SF Lots
ENCPA Village Center:	84 SF Lots
Plummer Creek Phase 2B:	76 SF Lots
Barnwell Manor:	189 SF Lots
Heron Isles Phase 3C:	39 SF Lots
Horseshoe Ridge:	4 SF Lots
Hampton Mill:	3 SF Lots
Mills Corner:	9 SF Lots
Lumber Creek Phase II:	78 SF Lots
Creekstone:	46 SF Lots
Hampton Lakes Phase II:	134 SF Lots
Heron Isles Phase Two C-3:	56 SF Lots
Amelia Concourse Phase 2:	153 SF Lots
Villas at Oyster Bay Harbour:	54 SF Lots
Clear Lakes Unit 2:	72 SF Lots
Cashen Farms:	6 SF Lots
McCully Forest:	7 SF Lots
Andy's Acres:	5 SF Lots
Lumber Creek Phase 3:	165 SF Lots
Flora Parke Unit 6B:	60 SF Lots
Woodbridge Phase 3:	113 SF Lots
Sandy Pointe Preserve Unit 1:	71 SF Lots
Woodbrier Phase 2:	41 SF Lots

Total: 1,520 Units

PLATS/HOUSING PROJECTS IN REVIEW:

Laurel Oak Estates:	30 SF Lots
Crane Island Phase I:	47 SF Lots
Hideaway Phase 1B:	73 SF Lots
Candlewood Farms:	6 SF Lots
Heartwood Farms:	6 SF Lots
Mills Creek Farms:	6 SF Lots
Hampton Lakes Phase 3:	95 SF Lots
Woodbridge Phase 4 **:	104 SF Lots
Wildlight Apartment Complex:	300 MF Units
Mills Creek Preserve:	350 MF Units
Crane Island Phase II **:	66 SF Lots
Concourse Crossing PUD*:	275 SF Lots
Wildlight Phase 1C-1 and 1C-2:	257 SF Lots
Village Walk Phase One:	72 SF Lots
Village Walk Phase Two:	59 SF Lots

Total: 1,746 Units

APPROVED PUD'S IN 2017-2018:

Nassau Crossing:

* 350 Single Family Units,

* 450 Multi-Family Units (15% reserved for workforce housing @ 80% AMI)

* 300,000sf of Office & Retail Space

* Five acre reservation for a future transit station

* Publicly accessible Community and Neighborhood Park

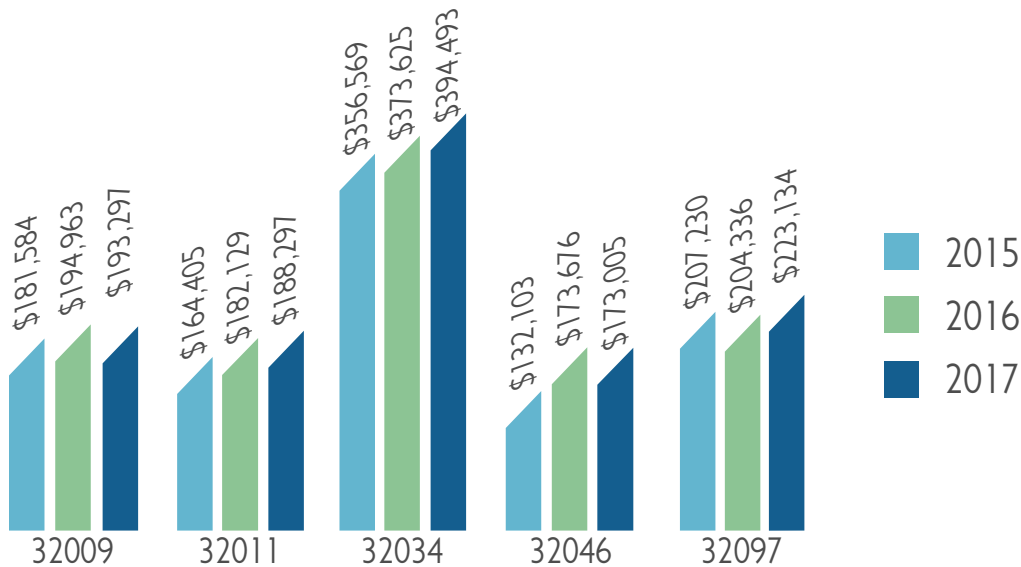
* Private Neighborhood/Pocket Parks

* Over two miles of publicly accessible multi-use trails

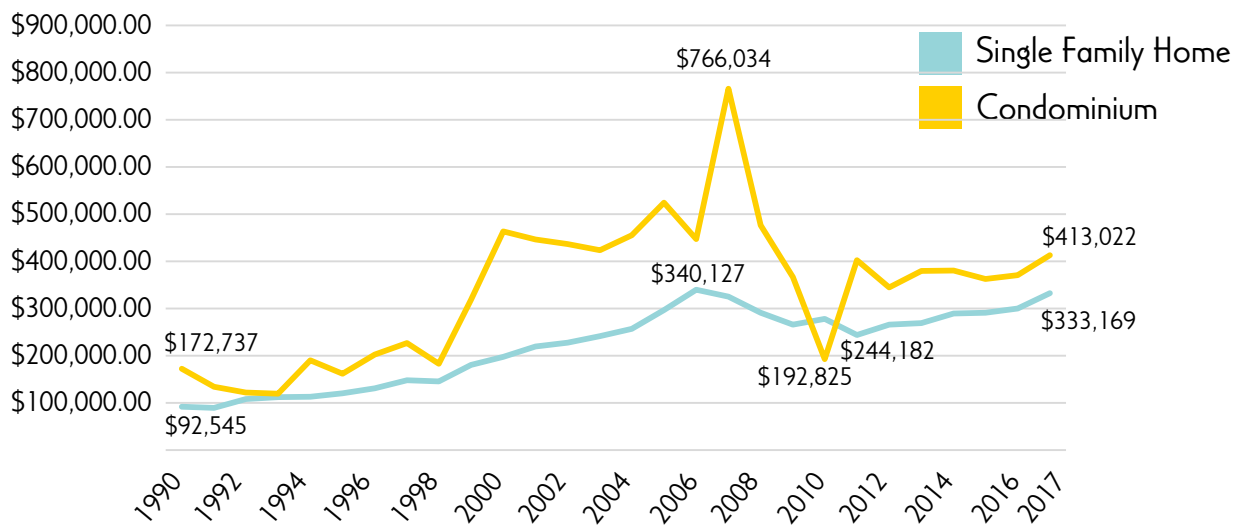
* Redevelopment of William Burgess Blvd.

* Current PUD in review, not yet approved by decision making body.

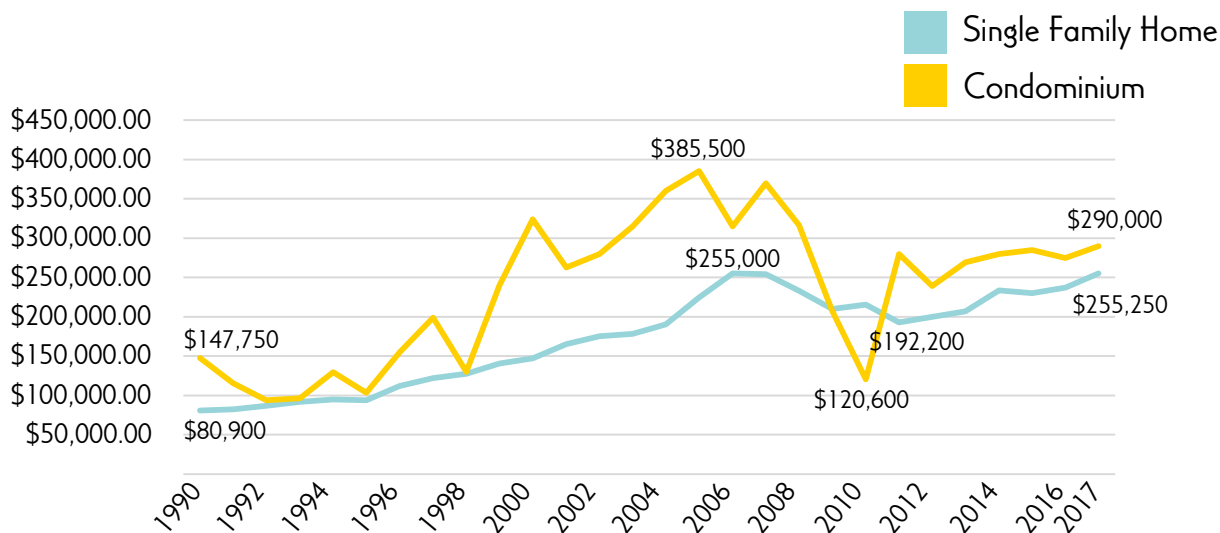
** Infrastructure Plans (Engineering Plans) in Review prior to plat submittal.



Graph 11. Average Home Sales Price in Nassau County by Zip Code⁷



GRAPH 12. MEAN SALES PRICE IN NASSAU 1990-2017⁹



GRAPH 13. MEDIAN SALES PRICES 1990-2017⁹

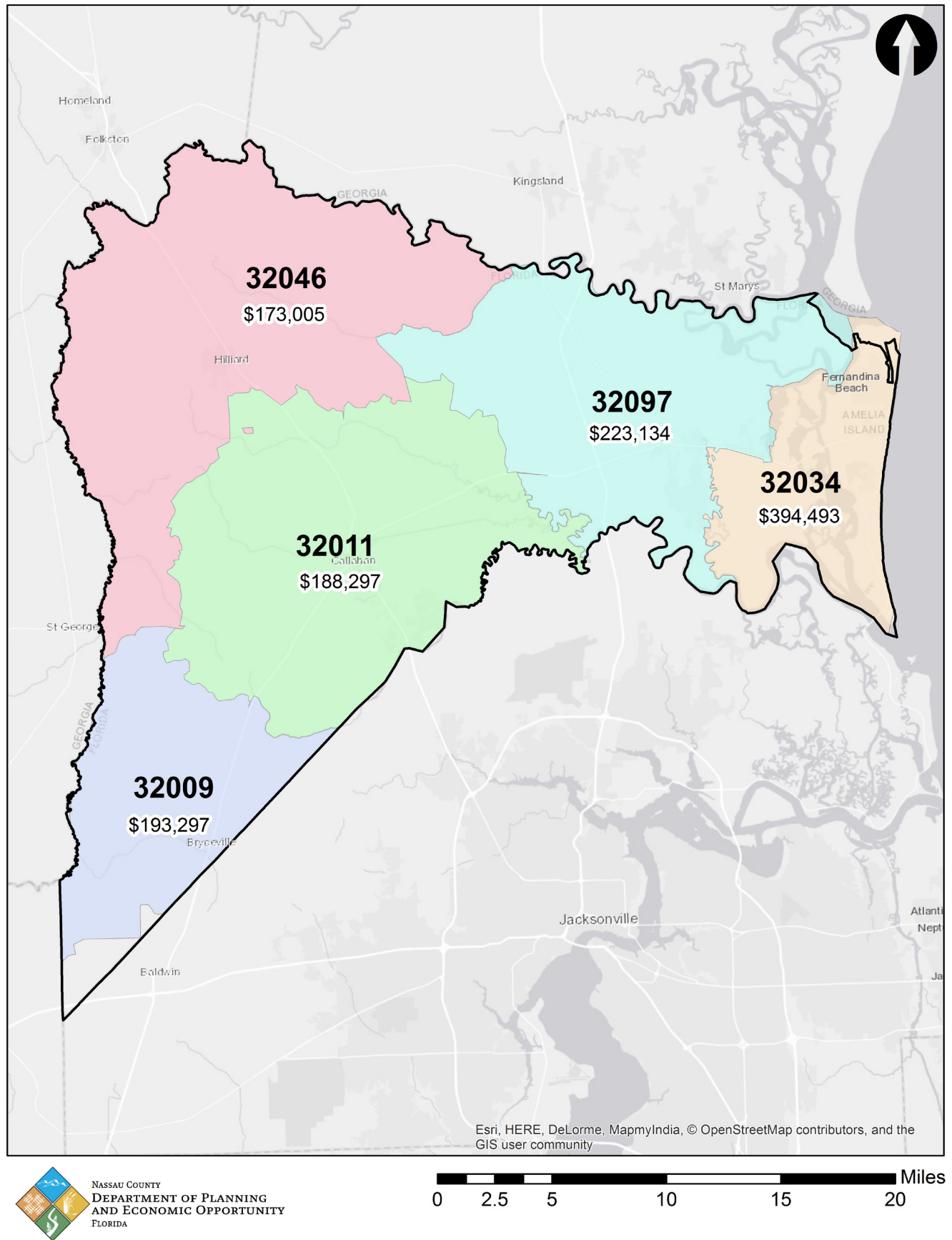


FIGURE 4. ZIPCODE MAP & AVERAGE SALES PRICE BY ZIPCODE