

# HOW DID WE GROW?

AN ANALYSIS OF GROWTH  
IN CENTRAL FLORIDA  
2007-2017







# TABLE OF CONTENTS

<b>Executive Summary</b> .....	3
<b>Where We Are Now</b> .....	5
<b>Regional Growth Vision</b> .....	6
<b>Six Principles</b> .....	9
<b>Original Trend</b> .....	10
<b>Looking Ahead</b> .....	12
<b>East Central Florida Growth Profile</b> .....	14
<b>Conservation</b> .....	17
<b>Countryside</b> .....	21
<b>Centers</b> .....	23
<b>Corridors</b> .....	27
<b>County Snapshots</b>	
Brevard.....	33
Lake.....	37
Marion.....	41
Orange.....	45
Osceola.....	49
Seminole.....	53
Sumter.....	57
Volusia.....	61
Polk - The Four Corners.....	64







# EXECUTIVE SUMMARY

Beginning in 2006, a significant regional planning program took place in East Central Florida. The *How Shall We Grow* regional visioning project was an 18-month campaign that engaged 20,000 residents in an effort designed to create a shared growth vision for Central Florida. Four themes were emphasized: Conservation, Centers, Countryside and Corridors. Through this process, the project team developed two potential regional growth outcomes for the year 2050. These options included Continuing the Trend or Implementing the Shared Growth Vision.

Through the vision developed with *How Shall We Grow*, the East Central Florida Strategic Regional Policy Plan was re-written. This plan promotes a future environment of urban centers connected by multi-modal transit options, with concentrated growth taking pressure off the region's vital natural resources.

This report analyzes the East Central Florida growth profile (with the addition of Sumter and Marion Counties) from 2007 to 2017 and benchmarks multiple development parameters with projections, objectives and goals from the 2007 *How Shall We Grow* plan. The findings of this report will be used to further work with member jurisdictions in East Central Florida to achieve the 2050 regional vision.



# PARCEL DEVELOPMENT

Additional Development from 2008 - 2017

## Regional Development

-  Existing Development in 2007
-  New Development 2008-2017

0 12.5 25 50 Miles

Source: County Property Appraiser Offices  
Esri, HERE, Garmin, ©OpenStreetMap contributors, and the GIS user community



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## INTRODUCTION

# WHERE WE ARE NOW

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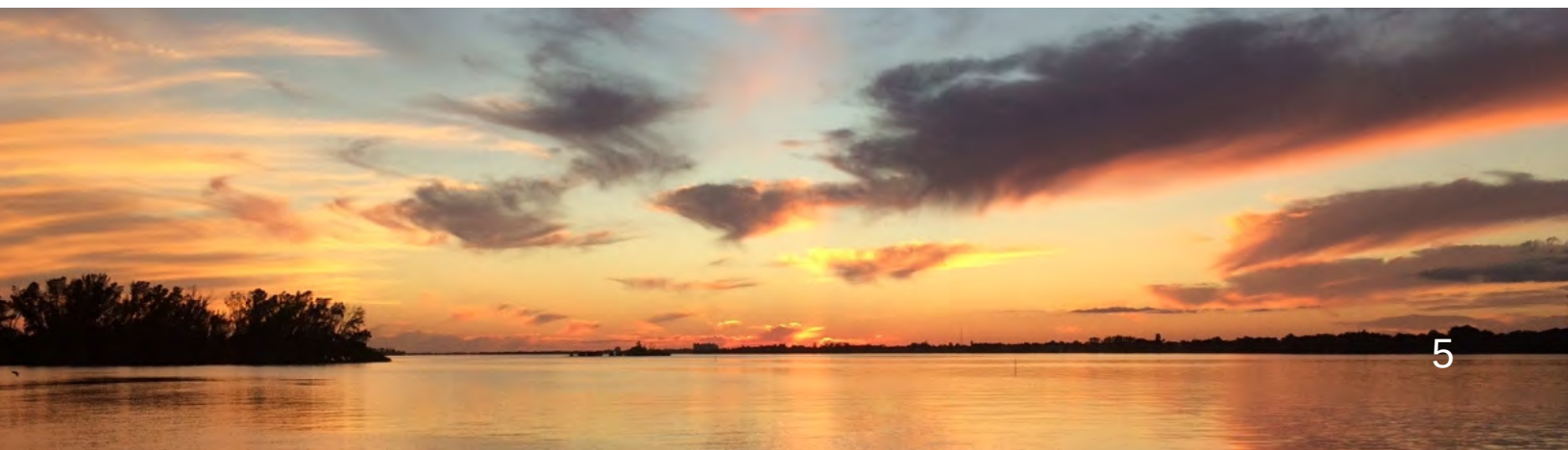
### A DECADE OF GROWTH IN EAST CENTRAL FLORIDA

Despite the recession, the East Central Florida region has experienced explosive growth in the decade since the original *How Shall We Grow?* report was released. The region's Orlando-Kissimmee-Sanford metro area has the highest growth rate out of the top 25 most populous metro areas in the United States, with more than 400,000 new residents since 2010. Population growth has not been contained to the regional core, however, as the Villages (37.8% growth), Deltona-Daytona Beach-Ormond Beach (11.7%), Palm Bay-Melbourne-Titusville (9.84%) and Ocala (8.7%) Metropolitan Statistical Areas have seen consistent growth as well. This reflects a national trend of population growth moving toward the southern United States.

This population growth has come in a number of forms from a residential perspective. Low-density, single family residential development continues to be built throughout the region – continuing the trend of sprawl – while multi family development has been built along multiple SunRail stations and critical transportation nodes in highly urbanized areas. Jurisdictions have begun to implement overlay and transit-oriented-development districts to continue this trend. The county profile section of this report details the number of acres and parcels built per year and residential type for each county in the East Central Florida region.

Industrial and commercial growth has also been consistent, recovering well after the recession of 2007-2009. Critical investments in the aerospace, high-tech and services industry have diversified the regional economy as population growth continues. Tourism is still the major employment sector in the region.

This report is meant to provide an analysis of the general growth profile of the East Central Florida region since 2007 from a transportation, land use, conservation and density perspective. The findings of this report will be used to inform policy objectives to enhance our ability to achieve the 2050 vision.



*Central Florida's*

# 2007 REGIONAL GROWTH VISION

## *Conservation*

Enjoying Central Florida's most precious resources - lands, waters, air, and wildlife.

Central Florida's natural setting is world-renowned and precious to all of us. Within an hour's drive, Central Floridians can enjoy swimming at the beach, canoeing or hiking at a natural spring or trail, or riding a bike on the most challenging trails in the state.

Central Floridians seek to ensure that our natural resources are available to our children and grandchildren. We want them to be able to access and enjoy our beaches, parks, trails, and recreation areas. We want them to see how irreplaceable wildlife, flora, and ecosystems can thrive alongside a dynamic economy. We also don't want them to worry about whether they will have clean air and water.

We will significantly expand the amount of land preserved for prosperity, including our critical lands and waters. These additional conservation lands will create many new spaces for recreation, wildlife, and groundwater recharge. Conservation lands will be connected in a necklace of "green" corridors throughout the region that preserve natural ecosystems and provide better mobility for wildlife and recreational travelers. Growth in water consumption and greenhouse gas emissions will be reduced, so that even as we add 3.5 million residents, our overall "footprint" on the environment can be limited.

## *Countryside*

Maintaining Central Florida's heritage of agriculture and small villages.

Agriculture will remain a viable option for large swaths of the region's land. Local farms will continue to provide a significant portion of our food supply, as well as valuable exports to other states and nations.

Farms, hamlets, small towns, and undeveloped countryside will remain a key element of Central Florida's landscape. They will provide choices for where people live and wide open spaces for people to enjoy. They also will provide soft edges to the major urban areas, rather than having a seemingly unending string of development.

Rural communities will enjoy a renaissance among retirees, visitors, and families. Central Florida's small towns will combine a relaxed quality of life with easy access to world-class urban centers throughout the region. They also will have easy access to markets in other regions, states, and nations through our modern transportation and communications systems.





## *Centers*

Hamlets, villages, towns and cities - a variety of places to live, work, and play.

Distinctive cities and towns will provide choices for how Central Floridians live. Communities will meet the needs of residents, from those who want to live in a downtown high rise to those who desire a five-acre lot in the country.

The region's most vibrant centers will provide a mix of residential and commercial development. These will include traditional cities like Daytona Beach, Mount Dora, Lakeland, Sanford, and Orlando, as well as new urban developments including Palm Bay, Altamonte Springs, and Deltona. Other centers will be more focused on economic drivers, such as the areas surrounding Orlando International Airport, the University of Central Florida, Cape Canaveral, and the region's world-renowned attractions.

Rich architectural details, urban parks, and commercial and cultural amenities will create a unique feel for each center. Most urban areas will have fewer single-family homes and an increased mix of apartments and condominiums. Schools, jobs, shopping, health care facilities, and cultural amenities will be located in close proximity to residential areas. Residents will feel safe and secure and will see Central Florida as a place where they can both raise families and retire.

## *Corridors*

Connecting our region with more choices for how people and freight move.

Transportation corridors will provide the glue that links Central Florida's diverse centers to each other, and to the rest of the world.

Central Florida will shift from a region that overwhelmingly depends on cars and trucks to offering its residents, businesses, and visitors a wide range of travel options.

Many people in the most compact urban centers will be able to walk, bicycle, or take a bus or streetcar to school or work. People moving between centers will be able to drive or use transit or passenger rail systems. Individuals and freight moving between Central Florida and other parts of the world will have a full range of choices - from high-speed expressways and rail systems to some of the world's most efficient airports, one of the nation's largest cruise passenger ports, and the nation's largest and most capable commercial spaceport.

Greater choices and shorter trips will help reduce congestion on the region's key highways, saving time, money, and stress for residents and businesses.

# REGIONAL COLLABORATION

From March 2006 to August 2007, nearly 20,000 Central Floridians participated in a historic "community conversation" to answer the question "How Shall We Grow?" People from all walks of life attended round table meetings, shared their hopes and fears, and compared alternative scenarios for what Central Florida could look like in the year 2050. Elected officials and other public, private, and civic leaders from all 7 counties at the time, and many of the region's cities met as part of councils, task forces, and technical committees to review policy options and develop future projections.

More than 86 percent of Central Floridians surveyed indicated that continuing on the current path of development was their least preferred options of four future scenarios. Instead, they had pointed toward a different approach to growth, in which the region preserves its most precious environmental and agricultural lands, focuses development in urban centers, and connects these centers with transportation corridors that provide choices for how people travel.





# SIX PRINCIPLES

In 2007, Central Florida's elected officials and government, business, and community leaders worked together to determine how the region could begin implementing a shared regional vision. Through a series of regional councils, working groups, and committees, our county commissioners, mayors and city councilors, school board members, public agency directors, business and civic leaders had begun tackling the tough questions about which policies and processes should change to enable the region to move toward this shared vision. After reviewing citizen input and analyzing growth projections, these leaders had identified six principles that would guide future growth decisions region-wide.

1

**PRESERVE** open space, recreational areas, farmland, water resources, and regionally significant natural areas.

2

**PROVIDE** a variety of transportation choices.

3

**FOSTER** distinct, attractive, and safe places to live

4

**ENCOURAGE** a diverse, globally competitive economy.

5

**CREATE** a range of obtainable housing opportunities and choices.

6

**BUILD** communities with access to health care, education, and cultural amenities.

## How did we grow?

Have we followed these 6 principles during the last 10 years? The following analysis will provide some insight into how the region has grown and what changes are required to stay in line with our goals.

# ORIGINAL TREND

The How Shall We Grow Initiative had recognized that current development trends have and continue to threaten Central Florida's livability and competitiveness. The following predictions were made on how Central Florida would be impacted by such trends if they did not change by 2050.



Water consumption will increase by 70%, depleting the Floridian aquifer and raising questions about the availability of water for future generations.



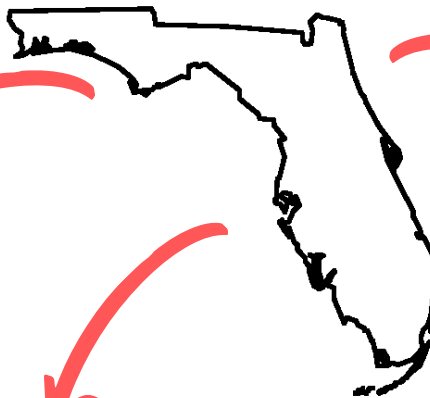
Residents will continue to move further away from where they work, resulting in increased commute times and less time at home. The majority of new money spent on transportation will be spent on new roads.



About 344 additional square miles of irreplaceable environmental lands and wildlife will be consumed.



The volume of carbon monoxide and other green house gases produced in the region will more than triple, contributing to a decline in air quality and public health and increased contributions to global climate change.



The region will consume as much land in 45 years - 2,577 square miles - as has been developed over the last 440 years.

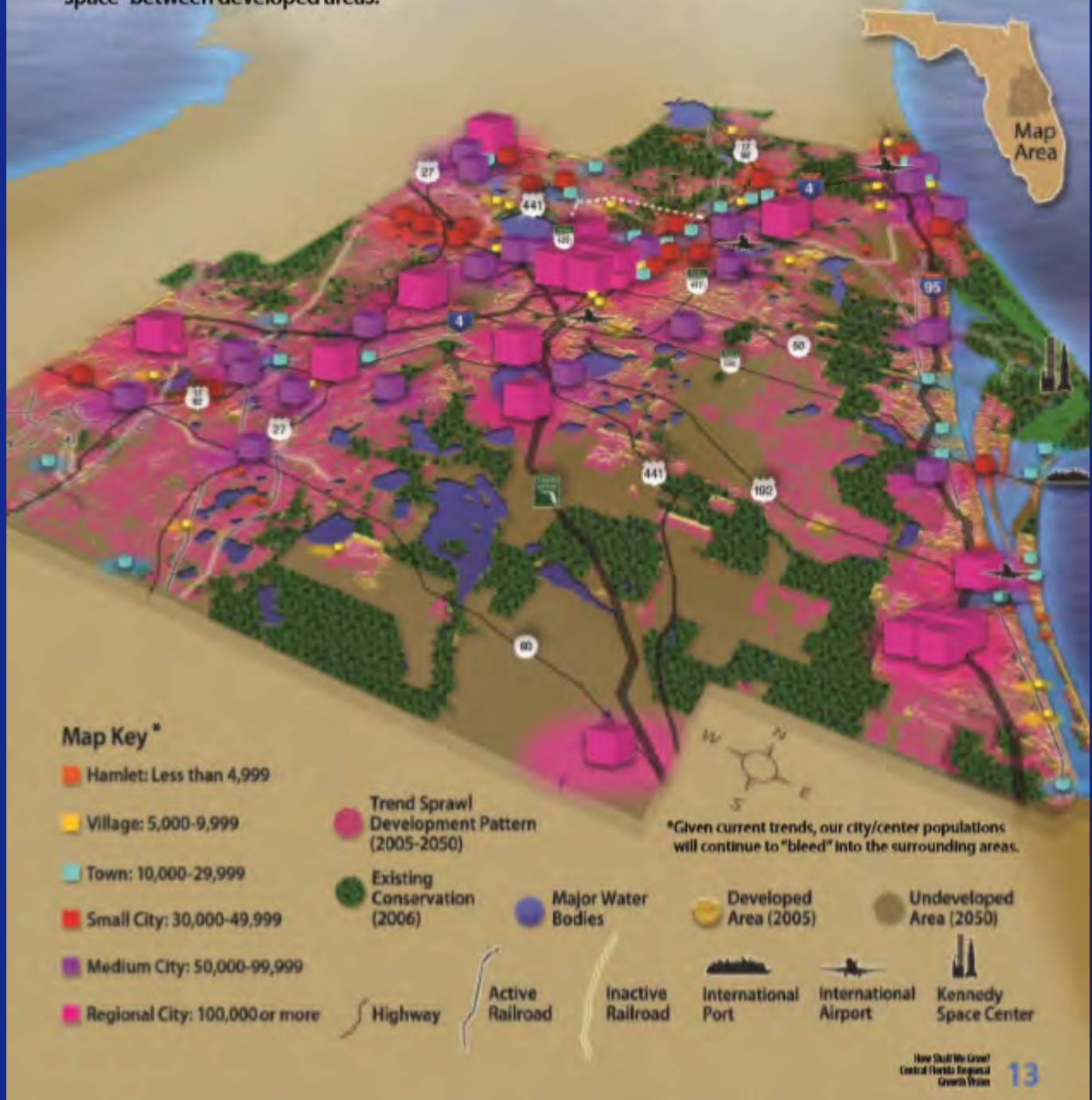


Most new buildings will be single-story, single-family homes on 1/3 to 1/2 acre lots. From the air, it will be difficult to distinguish one set of rooftops from another.



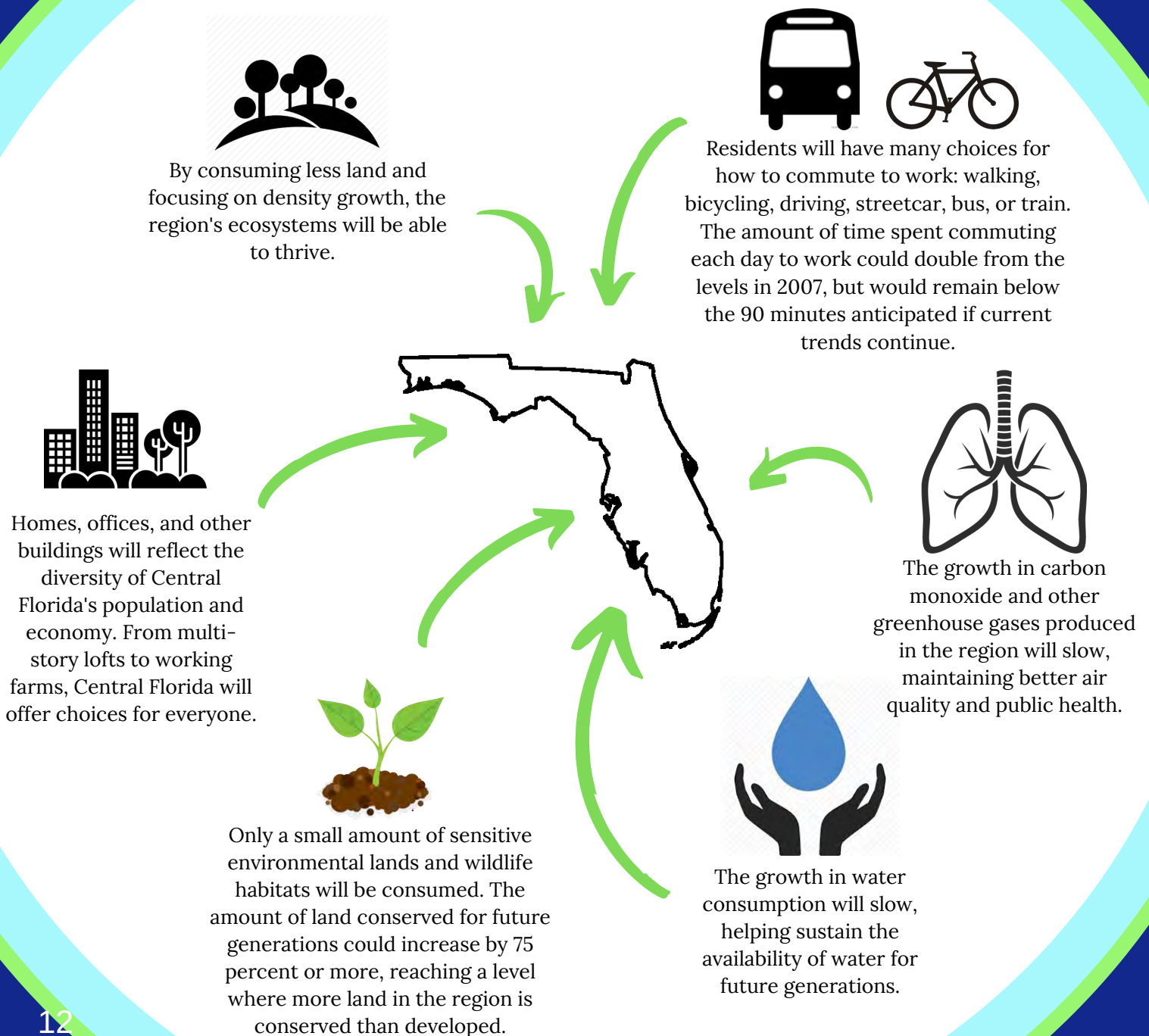
# 2050: What We Will Look Like... If Current Trends Continue

If current growth policies continue, the amount of developed land in Central Florida will double by 2050. More development will occur in places that once were distinctly rural or in sensitive environmental areas. City boundaries will meld into one another, with little distinction or "green space" between developed areas.



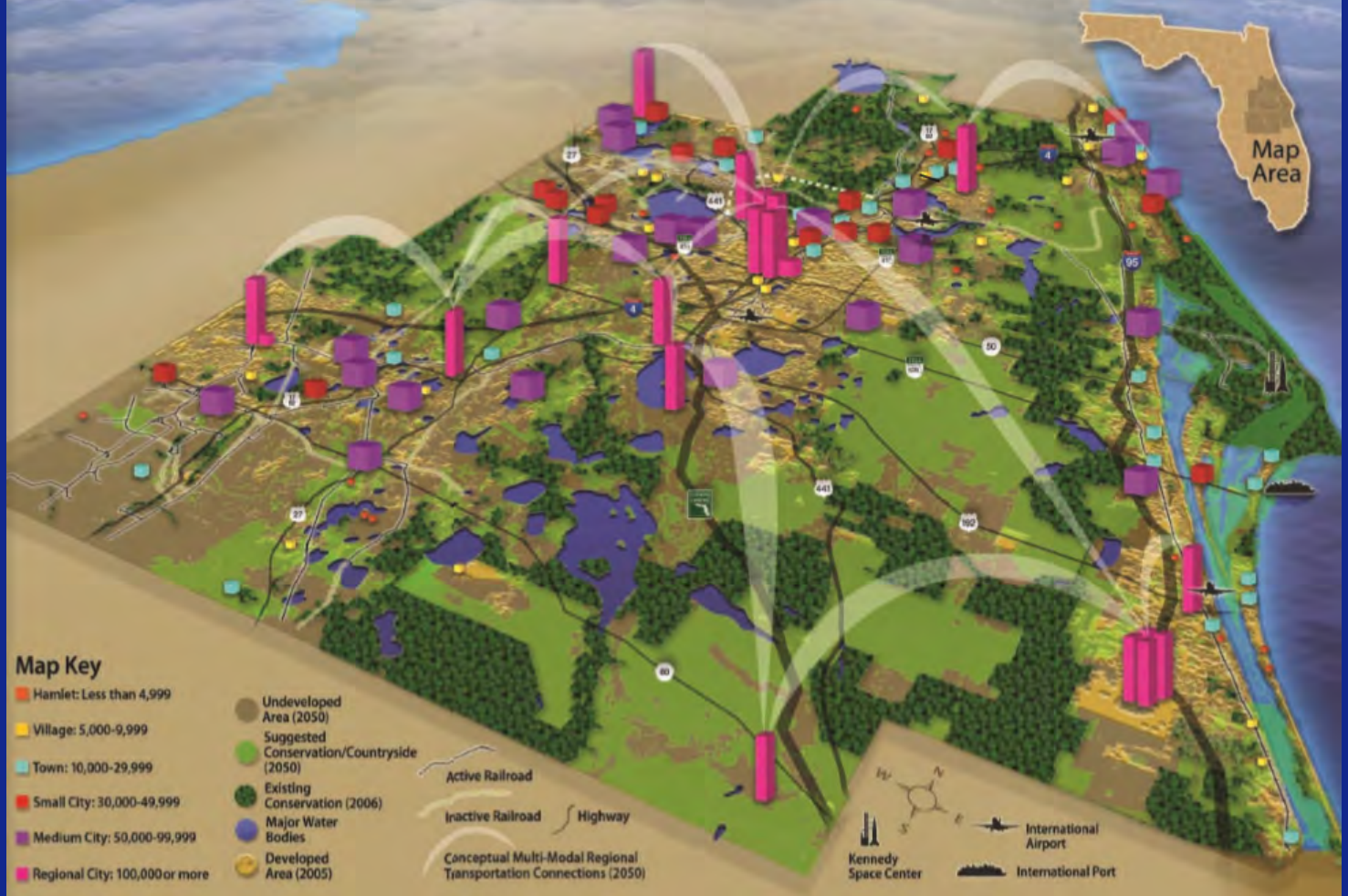
# LOOKING AHEAD

However, predictions were also made based on the shared vision implementation throughout East Central Florida by the year 2050. We have seen that development decisions oriented towards conservation, countryside, centers, and corridors could result in a very different future for Central Florida.

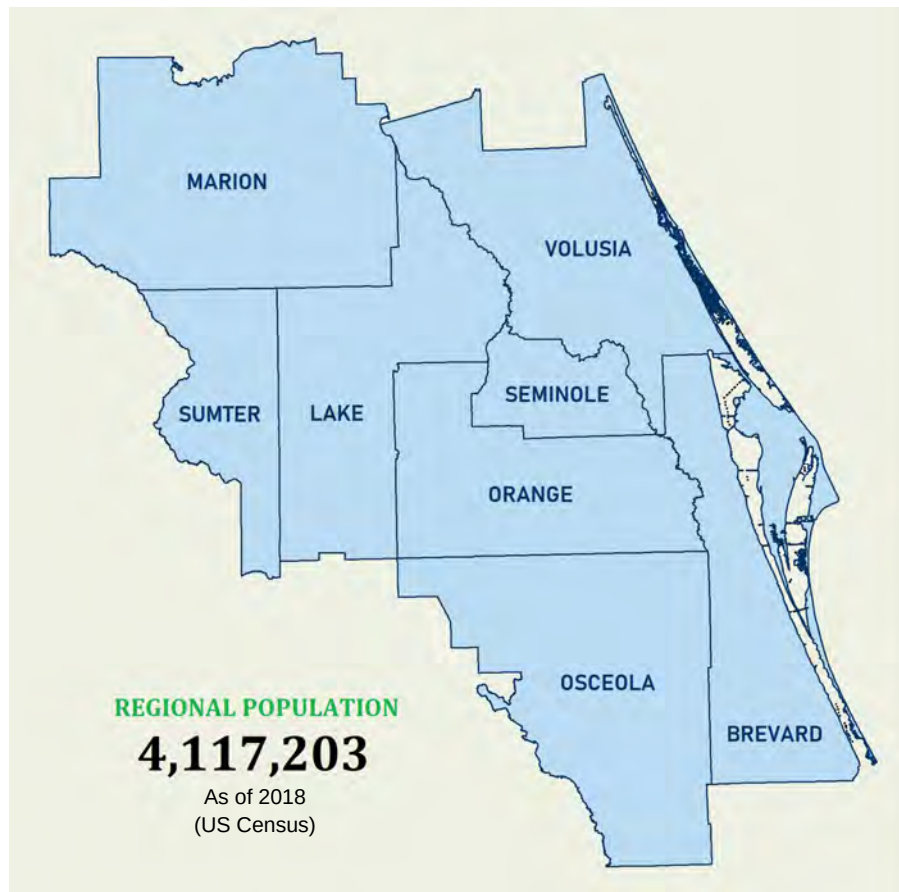




# What We Will Look Like... If Our Vision is Realized

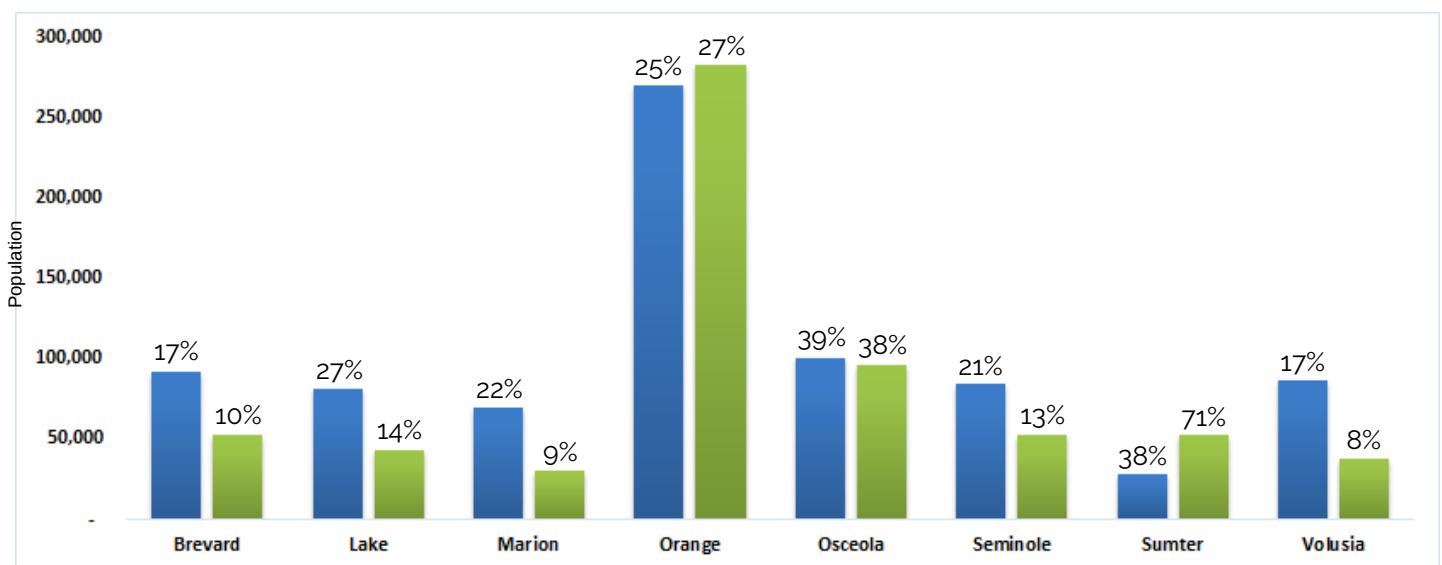


# EAST CENTRAL FLORIDA GROWTH PROFILE



## POPULATION GROWTH

**Projected** and **Actual** Population Growth With Percent Increase by County from 2007-2017

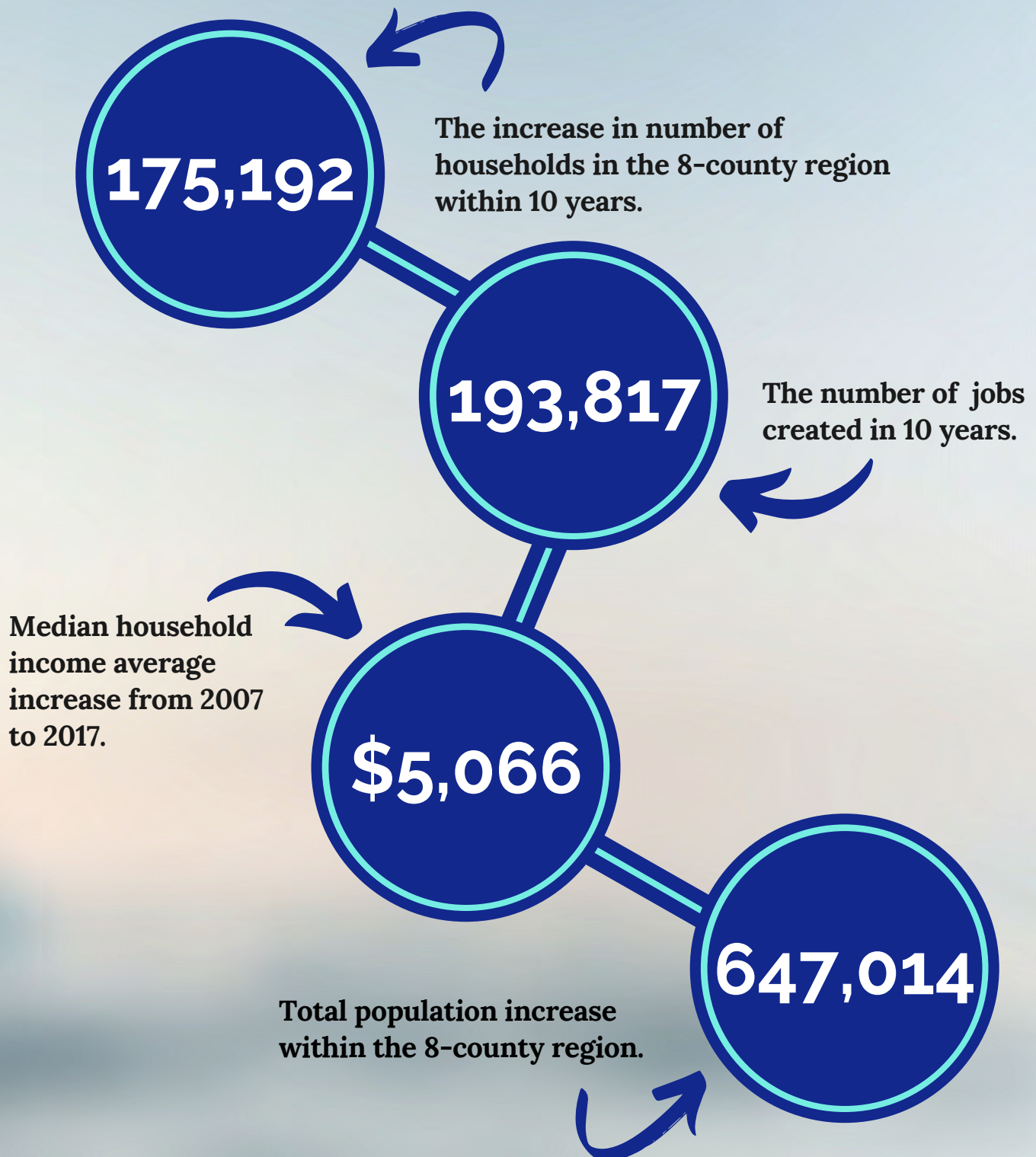


Source: US Census)



# 2007- 2017 Regional Demographics

Source: US Census)







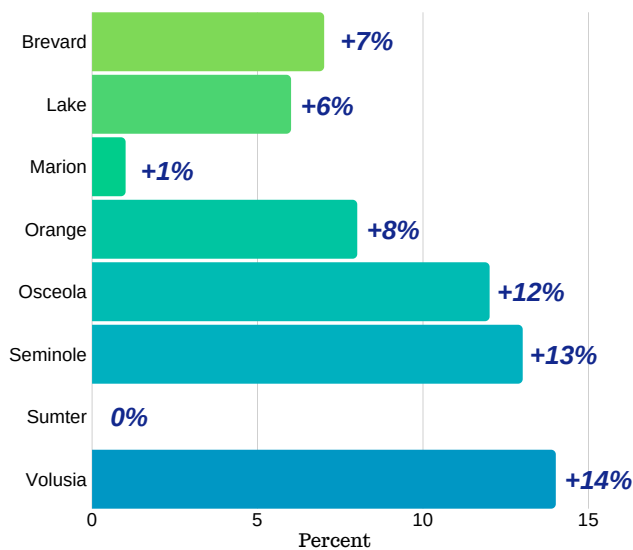


# CONSERVATION

## *A decade of nature*

Preserving conservation land plays an integral role in the longevity and resilience of Central Florida. It is essential to reach an equilibrium between the health of unique ecosystems in the region and regional growth. From 2007 to 2017, conservation land has increased by 10%. Current projections suggest a 799 square mile increase by 2045.

### Land Conservation Change from 2007-2017



Source: Florida Natural Areas Inventor

Regional Planning Councils must identify Natural Resources Of Regional Significance (NRORS) and promote the protection of these resources. The combined inventory of natural land and water assets in the region serves as the foundation for many economic opportunities and holds the potential to become a cornerstone economic engine. One of the long-term regional goals set in 2007 was to create a stronger regional approach to safeguard our regionally significant areas, not just as individual stretches of land and water, but as a tight knit and linked mosaic.

**10%  
INCREASE**

*The HSWG area has increased conservation land by 183 square miles*

**7%  
INCREASE**

*Water consumption increase in the 8 county region*

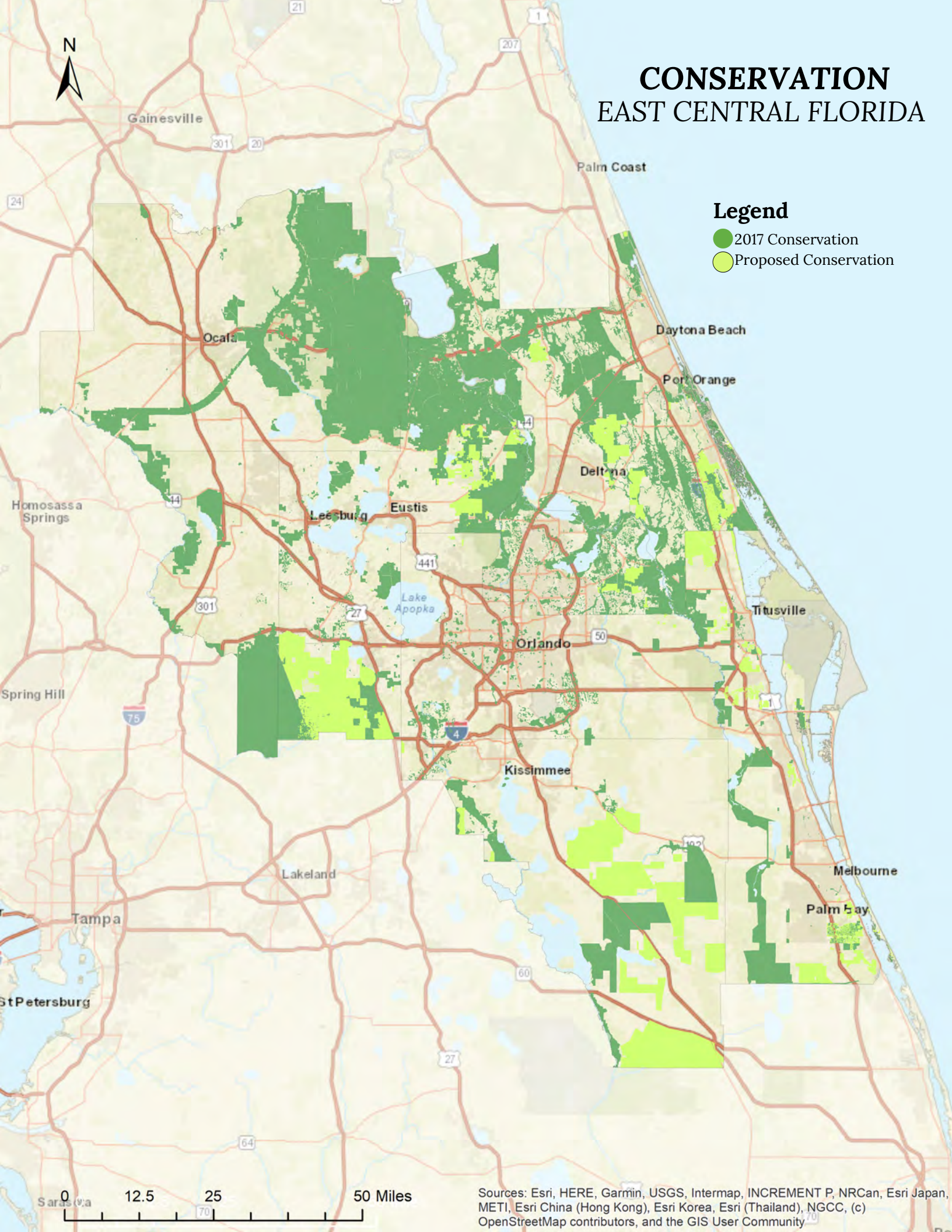
**799 SQUARE  
MILES**

*Predicted additional conservation land in the region by 2045*

# CONSERVATION EAST CENTRAL FLORIDA

## Legend

- 2017 Conservation
- Proposed Conservation







## CONSERVATION & WATER COMSUMPTION: ARE WE ON TRACK?

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*Have we succeeded as a region to not only protect natural lands, but create more unified conservation landscapes?*

The *How Shall We Grow Plan* projected the region's growth trend would consume 344 square miles of conservation land in 45 years. However, the desired effect of implementing the HSWG Plan would result in 0 square miles of consumed conservation land. In fact, new 2045 projections suggests a 799 square mile increase in conservation land, surpassing previous projections.

### Water Consumption 2007-2017 (Gallons per day per person)

County	2007	2017	Average Change
Brevard	179	174	-5 ↓
Lake	279	248	-31 ↓
Marion	109	117	8 ↑
Orange	100	105	5 ↑
Osceola	70	84	14 ↑
Seminole	122	123	1 ↑
Sumter	131	194	63 ↑
Volusia	128	148	20 ↑

Source: South Florida and St. Johns Water Management District

As a region, the average water consumption has risen significantly between 2007 and 2017. This indicates that as population increases, water needs grow as well. Sumter and Osceola Counties have experienced a water consumption increase per day per person of 48% and 20% respectively.

If the region establishes a 90 gallon per person per day target for potable water consumption and achieves it, there would be adequate amounts of water resources to meet population projections for decades to come.



# Agriculture

## Future Land Use



Agriculture  
Future Land  
Use

Source: ECFRPC GENFLU 2017

0 12.5 25 50 Miles

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# COUNTRYSIDE

## *A decade of agriculture*

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The east central Florida region is home to a vast array of agriculture, ranging from citrus to timberland and livestock. The data below provides detail on the number of farms, value of products sold and percentage change in market value since 2012 by County.

	Farms	Value of Products Sold (2017)	Change in Value 2012-17
Brevard	522	\$58,974,000	+ 28%
Lake	1,703	\$215,711,000	+ 52%
Marion	3,985	\$145,458,000	- 23%
Orange	622	\$231,964,000	- 11%
Osceola	392	\$85,449,000	- 21%
Seminole	403	\$21,345,000	- 22%
Sumter	1,307	\$54,457,000	+ 29%
Volusia	1,575	\$196,391,000	+ 76%

Source: U.S. Department of Agriculture (2017)







# CENTERS

## *A decade of land development*

This section of the analysis identifies regional trends in land development, including residential, commercial, industrial and institutional uses. A more granular analysis of land use development since 2007 is provided in the countywide profiles section of this report.

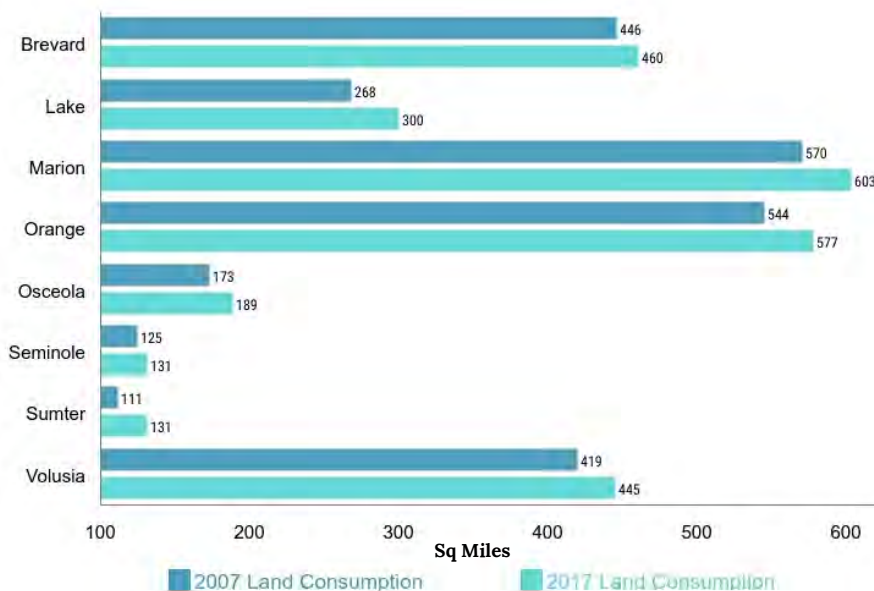
Much of the development is occurring on the fringe of the urban region contrary to the recommendations of the 2050 Plan. The findings and recommendations portion of this report will address these issues from a regional perspective.



Projections were made to validate the HSWG Plan's efforts in preserving the environment for future generations. It was projected that more than 2,500 square miles of land would be utilized by 2050 if the HSWG Plan were not created within the 6-county analysis at the time. The HSWG Plan projected that 1,000 square miles of land would be consumed by 2045 if all goals were met. Below is an analysis of land consumption per county within the current East Central Florida Region.

The developed area of the 8-county region increased by 146 square miles from 2007 to 2017.

**2007 and 2017 County Land Consumption (Sq Miles)**



Source: Property Appraisers





# 2007-2017 | URBAN GROWTH EAST CENTRAL FLORIDA

## Legend

- Growth before 2007
- Growth 2007 and after

0 10 20 40 Miles

Source: County Property Appraiser Offices

Esri, HERE, Garmin, (c) OpenStreetMap contributors, and the GIS user community



# DEVELOPMENT BREAKDOWN BY LAND USE

## Residential Development (Acres)



The housing boom of 2000-06 caused an unprecedented rise in housing prices, inverted affordability and made East Central Florida's housing more expensive than the national average. By 2007, the median price of a home in the Orlando region was \$264,436. The oversupply of housing, the overextension of credit, and the unsustainable amount of "flipping" all conspired to collapse the housing market in 2007 such that by 2009 the average price of a home in the Orlando region had dropped to \$123,000.

The financial collapse of 2007 and 2008 had a large impact on commercial, industrial and institutional development as can be seen in the graph to the right. After market stabilization in 2012, the industrial and institutional sectors saw the largest jump in proportional growth of the sectors covered. This has been apparent in downtown Orlando with the development of the Creative Village and downtown UCF campus. Regionally, the increase in industrial development was spurred by investment in the aerospace and high-tech industries. Since 2016, general commercial development has been on the up-tick after years of stagnation.

## Commercial, Industrial, Institutional and Hotel/Motel Development (Acres)



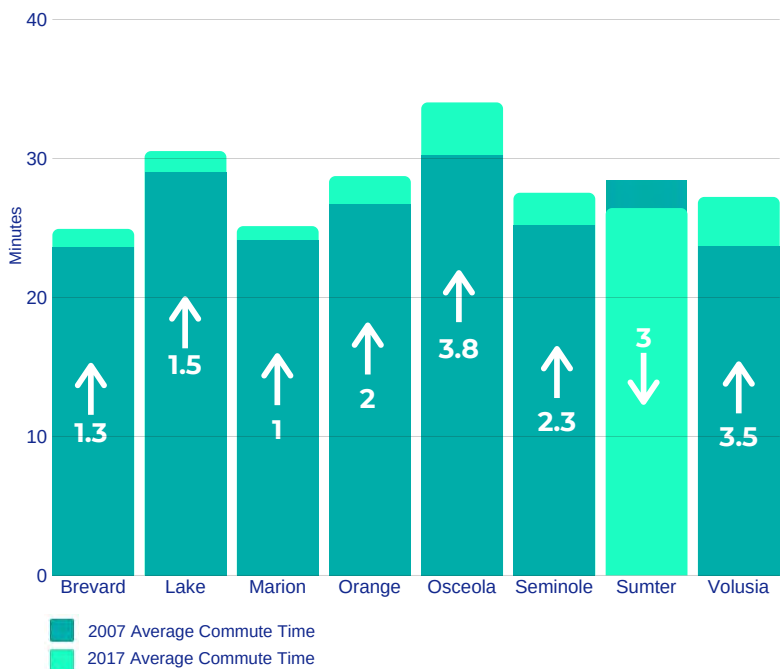




# CORRIDORS

## *A decade of transportation growth*

Average Change in Commute Time by County from 2007 to 2017  
(Journey to work mean travel time in minutes)



Source: US Census

### Average Commute Time Forecasts

2017 Actual.....	28.7 minutes
HSWG 2017.....	26.1 minutes
HSWG 2050 Plan.....	20 minutes
2050 Trend.....	<b>36.7 minutes</b>

The HSWG Plan predicted the average commute time would increase by 20 minutes per person by 2050. However, updated data for the 2050 trend shows the average commute time will increase by 16.7 minutes per person by 2050, resulting in an average commute time of 36.7 minutes. Within the span of 10 years, the region experienced 319,829 more vehicles on the road, an overall increase of 1.1%.



Pictured: SunRail has spurred Transit Oriented Development in Lake Mary





# ALTERNATIVE MODES OF TRANSPORTATION

## EAST CENTRAL FLORIDA

Gainesville

### Legend

- Rail Stations
- SunRail
- Bus Routes
- Bike Lanes

Bikes lanes includes  
marked bike lanes  
and paved shoulder.

Palm Coast

Ocala

Daytona Beach

New Smyrna Beach

Deltona

Leesburg

Titusville

Kissimmee

Lakeland

Melbourne

Palm Bay

Tampa

0 12.5 25 50 Miles

Sources: LYNX, SunRail, ECFRPC

Esri, HERE, Garmin, (c) OpenStreetMap contributors, and the GIS user community

# TRANSPORTATION IMPROVEMENTS



Picture Credits: Ahmed Hashim

## Sunrail

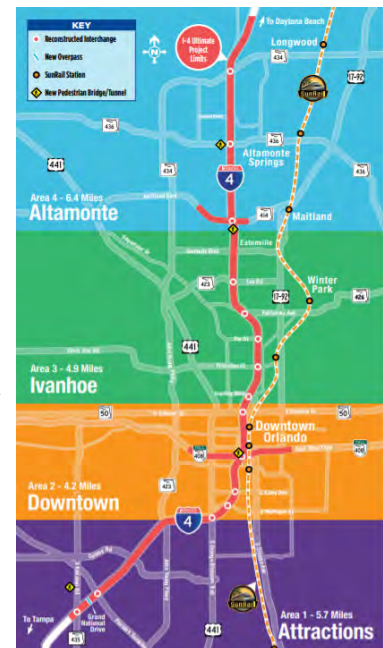
SunRail began service in 2014 and has acted as a catalyst for transit oriented development. Jurisdictions along the SunRail corridor have adopted overlay districts in order to allow for more dense development, which has spurred private investment. Future development is preferred along this corridor.

## Ultimate I-4

Work on Ultimate I-4 began recently and is expected to be completed by 2021 or 2022.

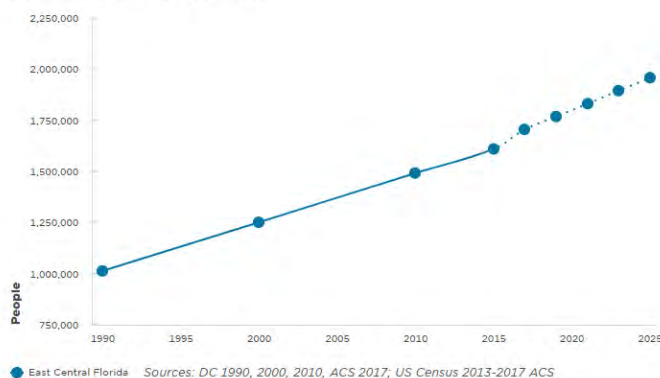
Traffic improvements associated with this project will alleviate congestion at critical intersections along the highway system. This includes large-scale improvements in the downtown area, near Universal Studios, along on-ramps and off-ramps, as well as at the intersection of the East-West Expressway.

While this infrastructure investment is important for moving automobiles throughout the region, this project does not act as a catalyst for focused, dense urban development as proposed in How Shall We Grow.



Source: i4ultimate.com

Population Commuting to Work

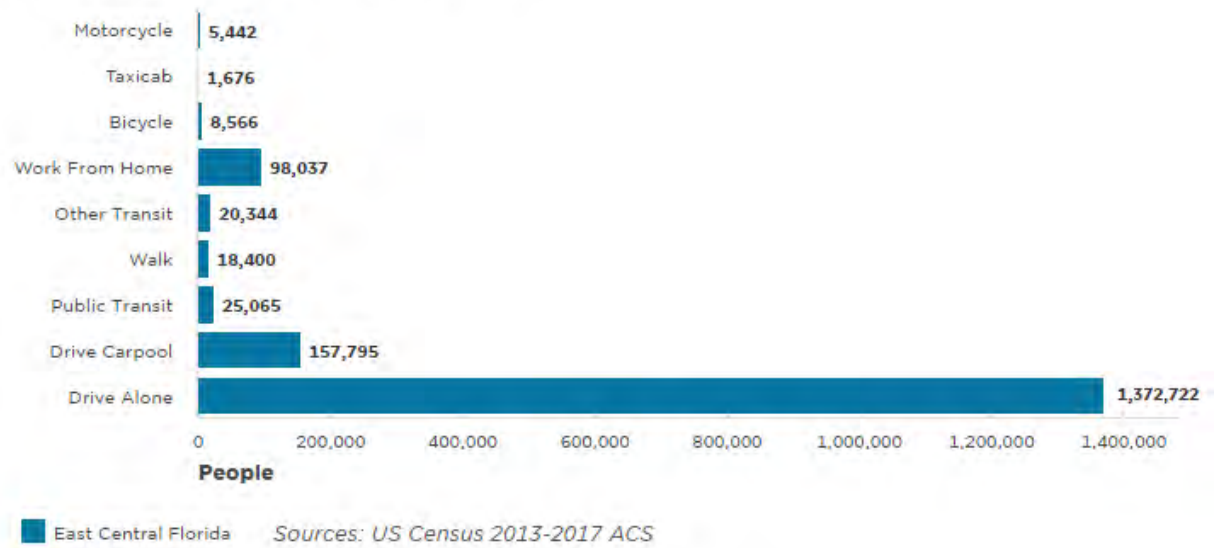


## LYNX Network Expansion

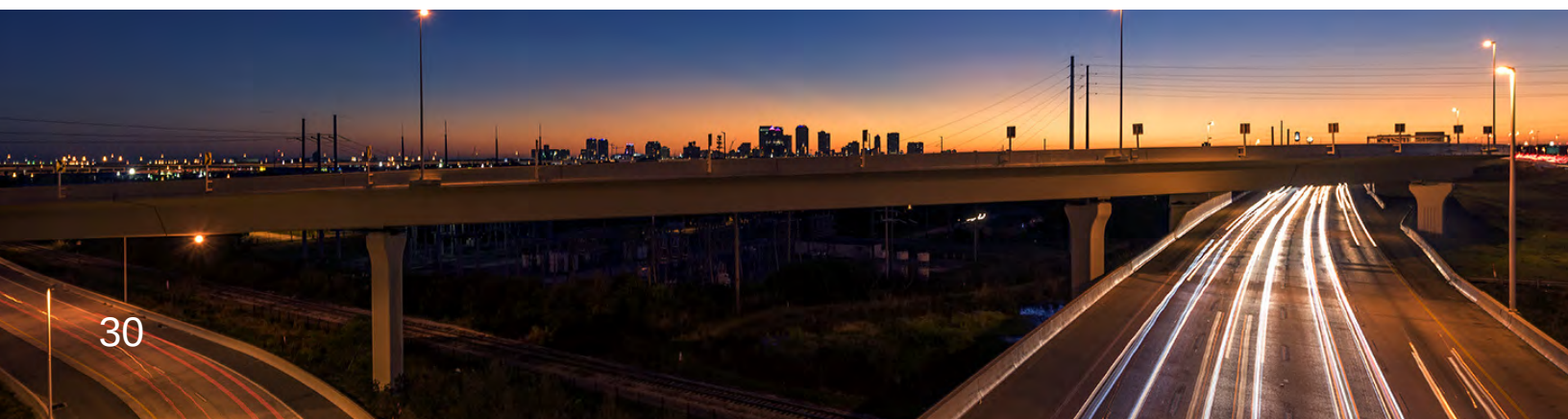
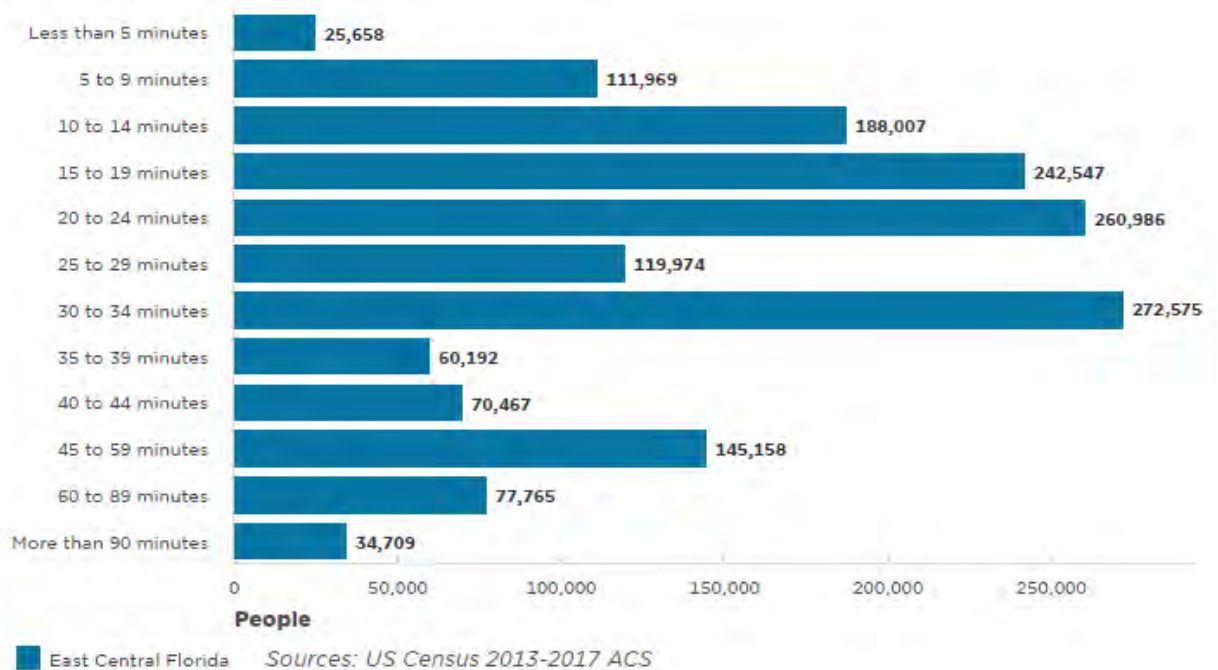
LYNX, the busing and para-transit provider for the Orlando Metro area, has expanded its service throughout the core of the east central Florida region. Avenues are being explored to increase funding for LYNX in order to meet growing demand for transit. Funding currently limits operations.



## Commute Means of Transportation



## Commute Time to Work



# Environmental Impact of Transportation

The How Shall We Grow Plan did not forecast metric tons of carbon dioxide emissions, but had a goal of reducing emissions by 2050 through the higher percentage of electric vehicle usage. Current trends show the emissions per vehicle per year increasing by 1% over the past 10 years, and 2% by 2050. However, due to the increase levels of hybrid and electric vehicles, the greenhouse gas emissions trend may be reduced in the future.



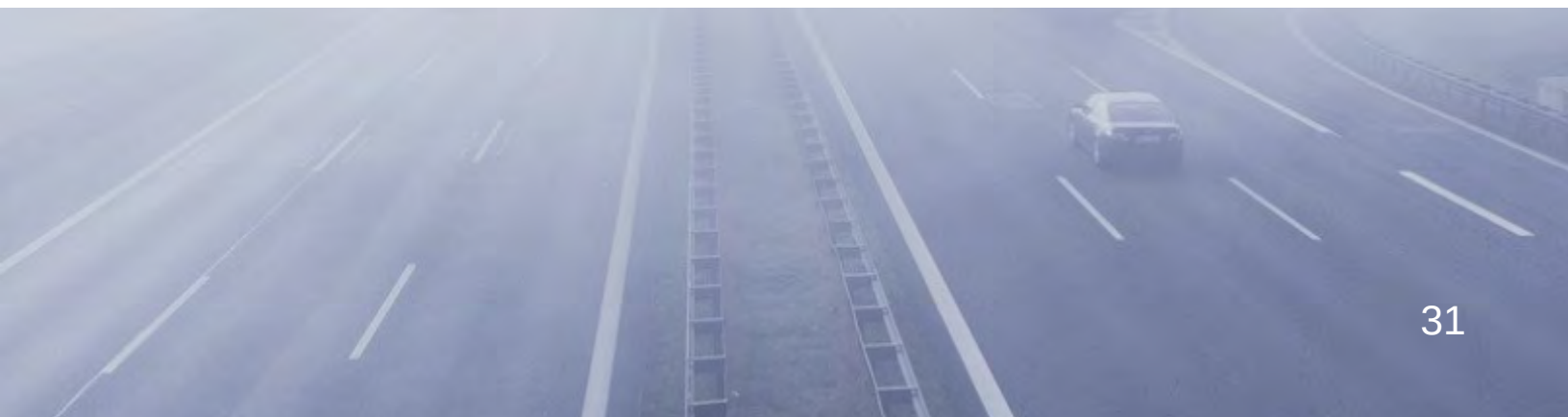
*Traffic in Downtown Orlando*



*Source: theguardian.com*

## What does this mean for the region?

The Environmental Protection Agency rated the air quality respiratory hazard index in the region. Orange County ranked highest at 0.58, followed by Seminole County at 0.55. A respiratory hazard index below 1 means the respiratory pollutants are not likely to increase risk of non-cancer adverse health effects over a lifetime. However, if greenhouse gas emissions increase yearly alongside the growing number of vehicles on the road, East Central Florida's air quality may be compromised.





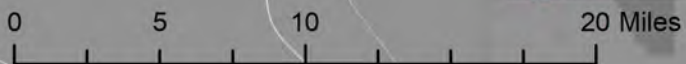
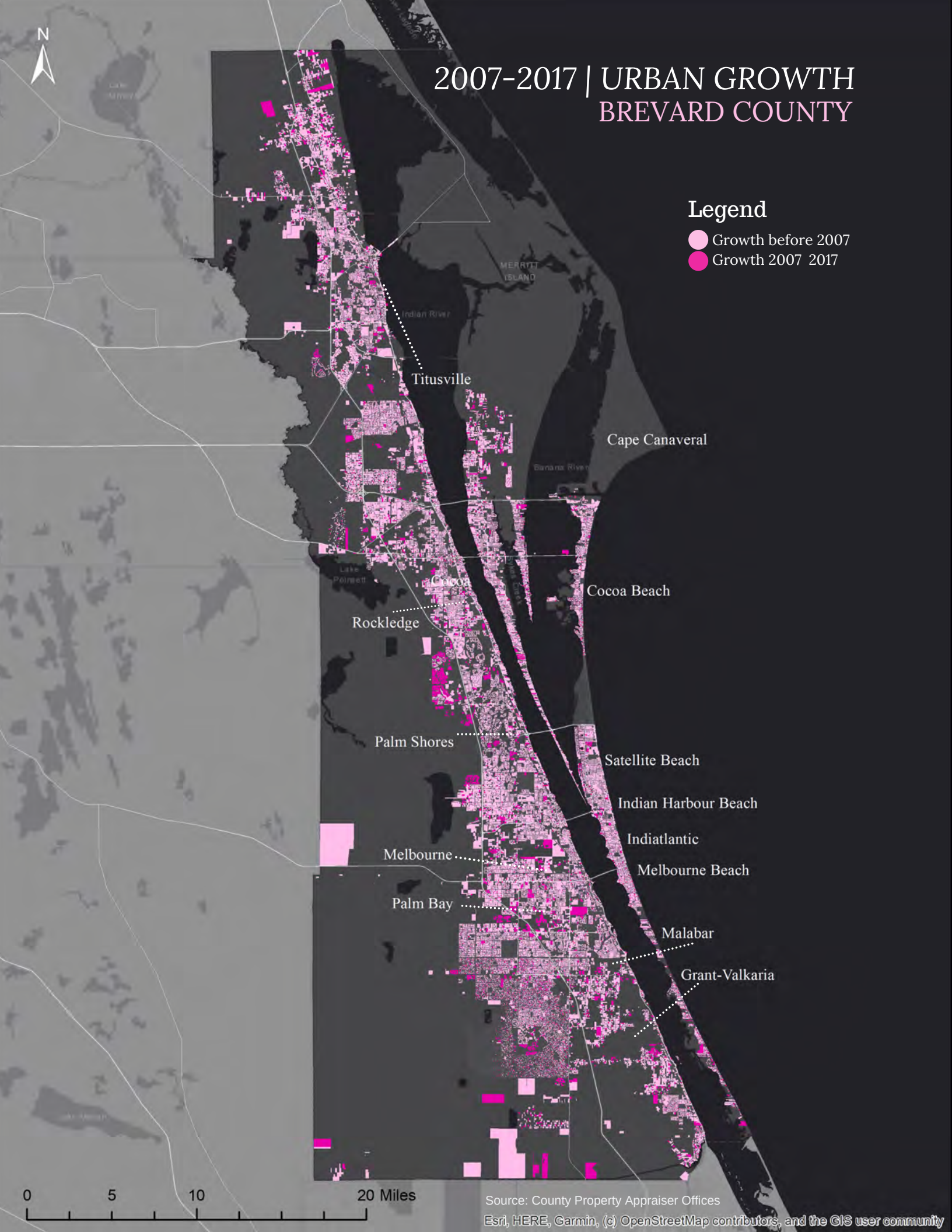




# 2007-2017 | URBAN GROWTH BREVARD COUNTY

## Legend

-  Growth before 2007
-  Growth 2007-2017



Source: County Property Appraiser Offices  
Esri, HERE, Garmin, (c) OpenStreetMap contributors, and the GIS user community

# Brevard County

COUNTY SNAPSHOT 2007-2017



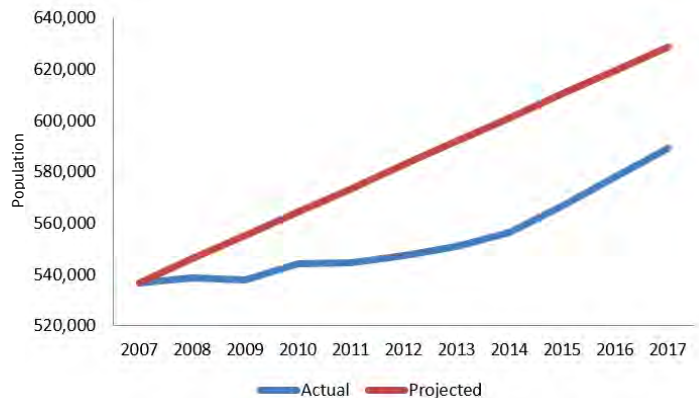
## OVERVIEW

Brevard County is located on the Floridian east coast and offers a array of coastal attractions for residents and visitors alike. As a coastal community, the population is subject to environmental vulnerabilities such as sea level rise. From 2007-2017 an additional 52,467 residents have moved to the county. The 2050 HSWG data predicted a 17% increase in population growth, whereas actual data shows a 10% increase from 2007-2017.

## MAJOR DEVELOPMENTS

CAMID MANUFACTURING CENTER  
PORT CANAVERAL EXPANSION  
SPACE X / BLUE ORIGIN FACILITIES  
VIERA GENERAL DEVELOPMENT

## 2007-2017 Population Growth



Source: US Census

**17%**

Predicted county growth  
based on 2050 projection

**10%**

Actual county growth

**52,467**

New residents

**-3%**

Decrease in overall water  
consumption



# DEVELOPMENT OVERVIEW

11,506

Increase in number of households

\$2,186

Increase in Median Household Income



2007-2017 Residential Development



5,495

Additional acres dedicated to single family housing

643

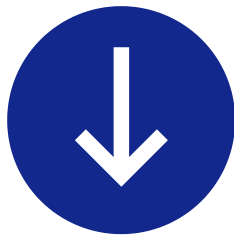
Additional acres dedicated to high density housing

# TRANSPORTATION & EMPLOYMENT OVERVIEW



## 18,402

**Increase in the number of vehicles (equivalent to 0.4% increase in 10 years).**



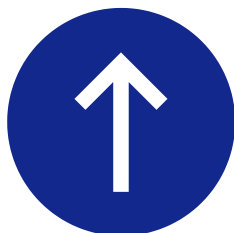
## 32.3

**2017 vehicle miles of travel (per person) - 1.4 mile decrease since 2007.**



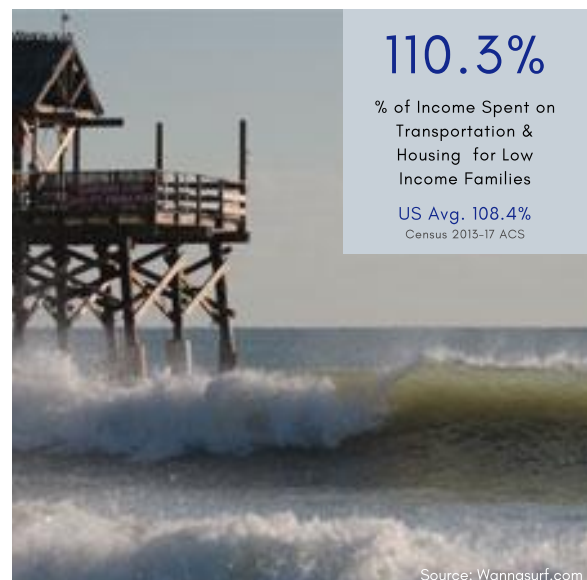
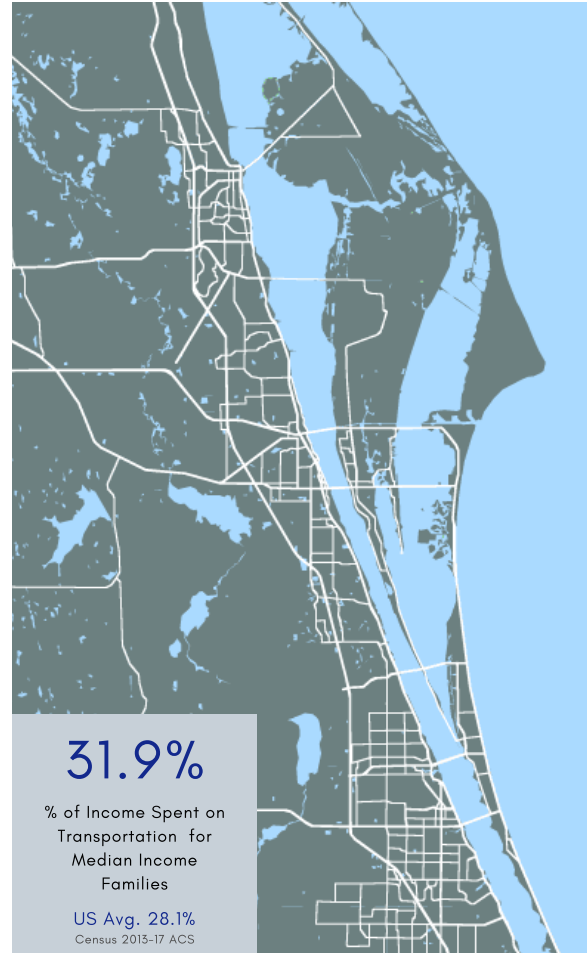
## 24.9

**2017 Average commute time - 1.3 minute increase since 2007.**



## 3,266

**Increase in employment positions.**





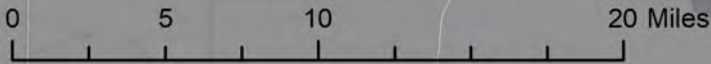
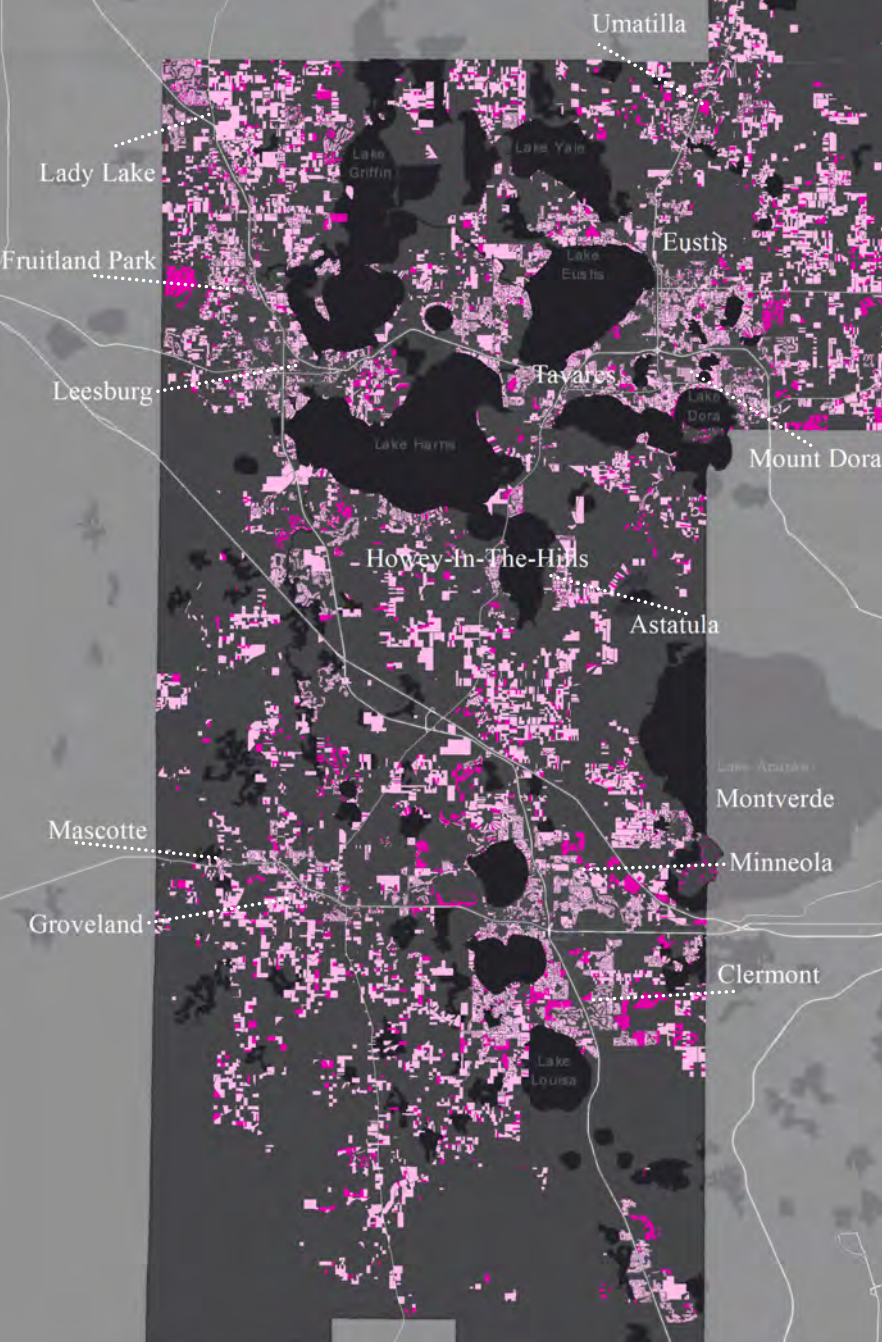




# 2007-2017 | URBAN GROWTH LAKE COUNTY

## Legend

-  Growth before 2007
-  Growth 2007-2017



# Lake County

COUNTY SNAPSHOT 2007-2017



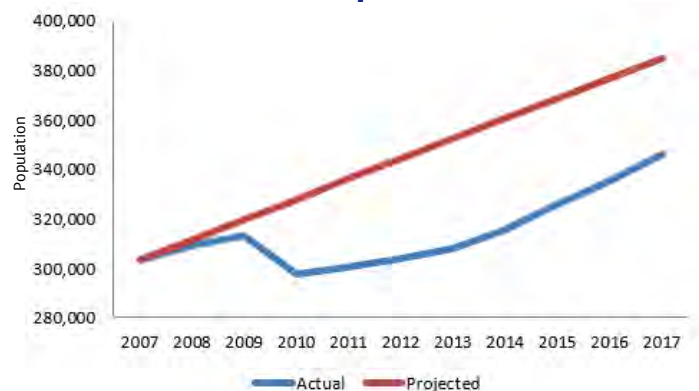
## OVERVIEW

Lake County is located in northwest central Florida, with Clermont being its largest city. The county's terrain contains some of the highest elevations in the State and is home to over 1,000 lakes. From 2007-2017 an additional 42,538 residents moved to the county. The 2050 HSWG data predicted a 27% increase in population growth, whereas actual data shows a 14% increase.

## MAJOR DEVELOPMENTS

LAKE DEATON AREA DEVELOPMENT  
OLYMPUS SPORTS COMPLEX (APPROVED)  
THE VILLAGES GENERAL DEVELOPMENT

## 2007-2017 Population Growth



**27%**

Predicted county growth  
based on 2050 projection

**14%**

Actual county growth

**42,538**

New residents

**-11%**

Decrease in overall water  
consumption



# DEVELOPMENT OVERVIEW

17,556

Increase in number of households

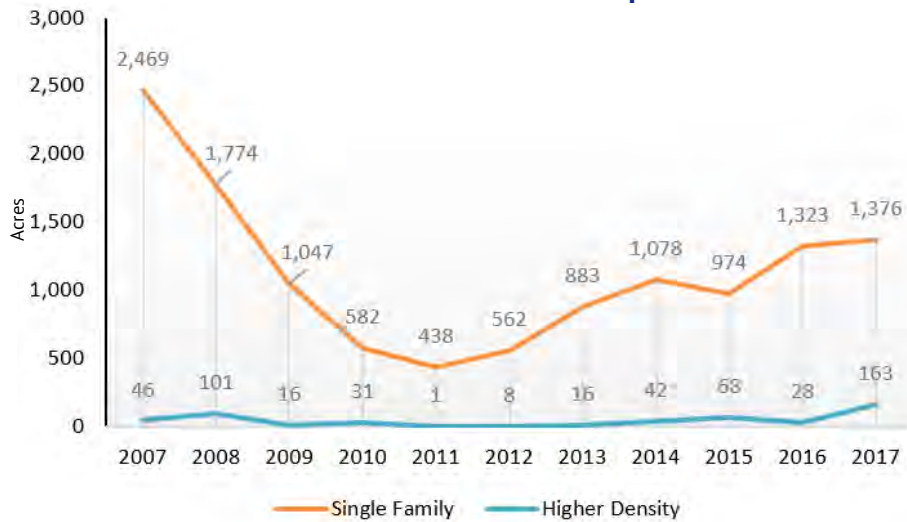
\$4,586

Increase in median household income



Source: Realtor.com

2007-2017 Residential Development



12,506

Additional acres dedicated to single family housing

520

Additional acres dedicated to high density housing

# TRANSPORTATION & EMPLOYMENT OVERVIEW



## 37,325

**Increase in the number of vehicles (equivalent to 1.6% increase in 10 years).**



## 30.1

**2017 Vehicle miles of travel (per person) - 0.25 mile increase since 2007.**



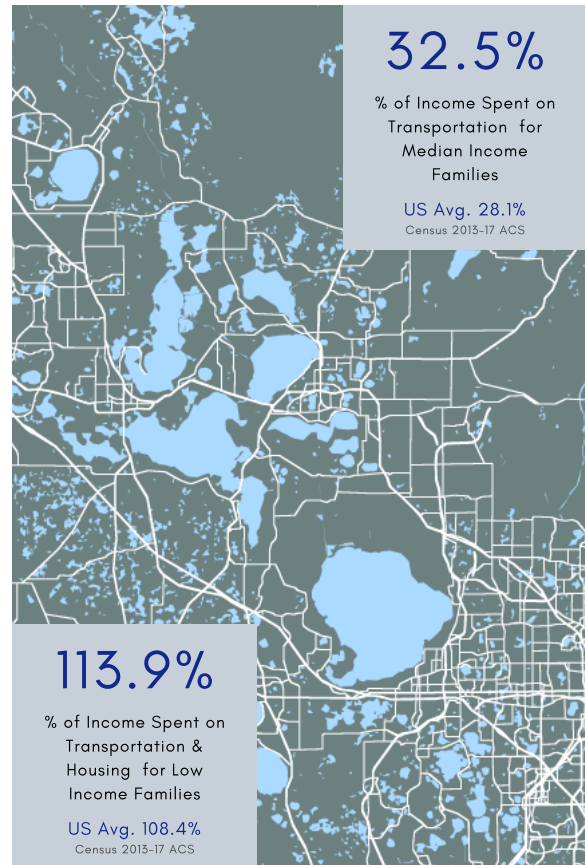
## 30.5

**2017 Average commute time - 1.5 minute increase since 2007.**



## 17,702

**Increase in employment positions.**









# 2007-2017 | URBAN GROWTH MARION COUNTY

Gainesville

## Legend

-  Growth before 2007
-  Growth 2007-2017

McIntosh

Reddick

Ocala

Silver Springs  
Shores

Dunnellon

Bellevue

The Villages

0 5 10 20 Miles

Source: County Property Appraiser Offices

Esri, HERE, Garmin, (c) OpenStreetMap contributors, and the GIS user community

# Marion County

COUNTY SNAPSHOT 2007-2017



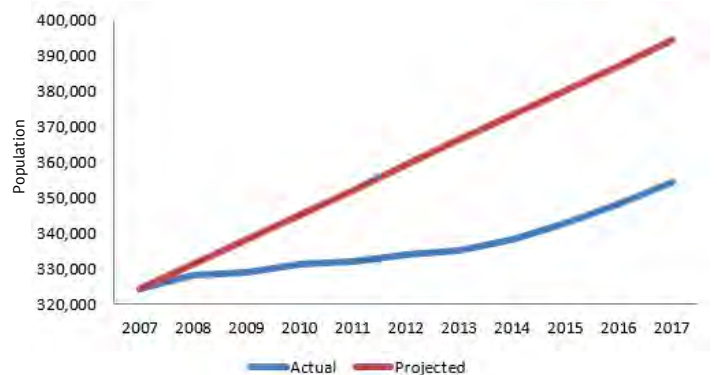
## OVERVIEW

Marion County is located in northwest central Florida. The county offers many natural attractions including Ocala National Forest, Silver Springs, and the Florida Trail. From 2007-2017 an additional 30,038 residents have moved to the county. There was a 9% increase in population from 2007 to 2017.

## MAJOR DEVELOPMENTS

GOLDEN OCALA (ONGOING)  
WORLD EQUESTRIAN CENTER (ONGOING)

## 2007-2017 Population Growth



Source: US Census

**22%**

Predicted county growth based on 2050 projection

**9%**

Actual county growth

**30,038**

New residents

**7%**

Increase in overall water consumption



# DEVELOPMENT OVERVIEW

11,798

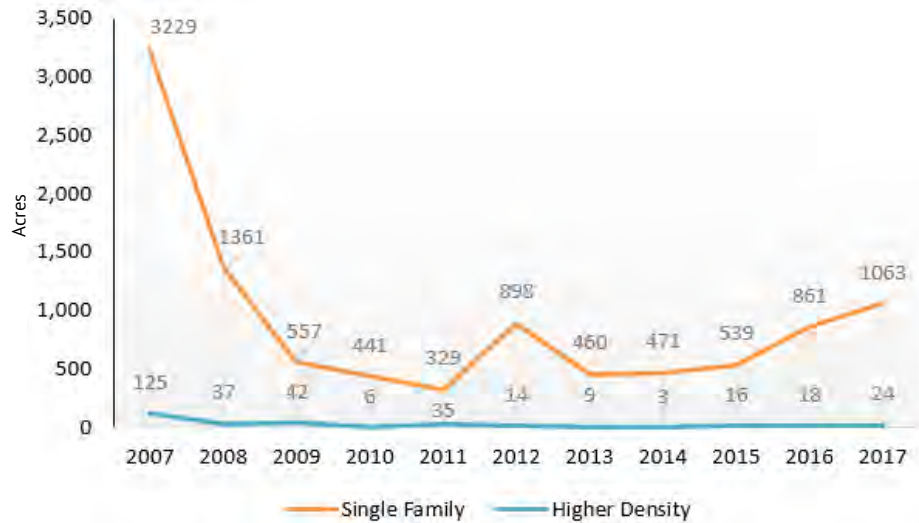
Increase in number of households

\$4,616

Increase in median household income



2007-2017 Residential Development



10,209

Additional acres dedicated to single family housing

329

Additional acres dedicated to high density housing

# TRANSPORTATION & EMPLOYMENT OVERVIEW



## 13,088

**Increase in the number of vehicles (equivalent to 0.5% increase in 10 years).**



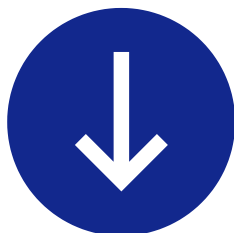
## 35.9

**2017 Vehicle miles of travel (per person) - 0.97 mile decrease since 2007.**



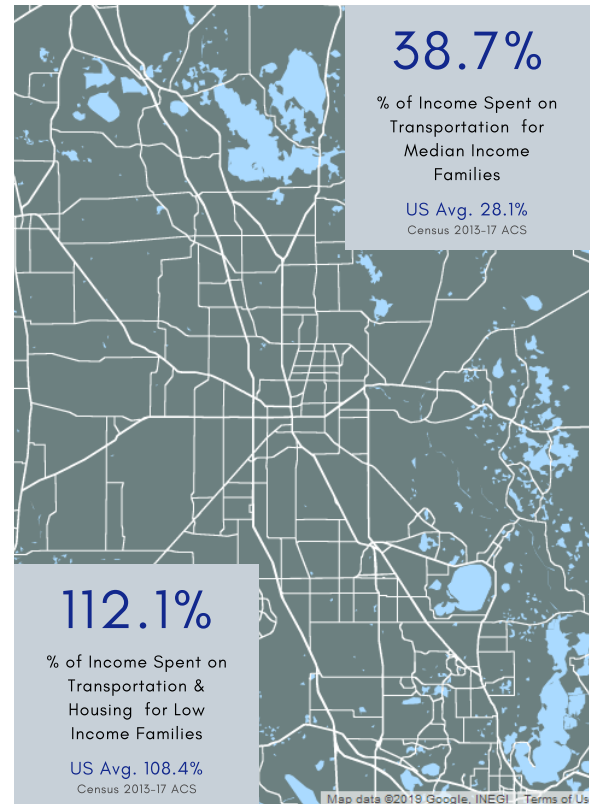
## 25.1

**2017 Average commute time - 1.02 minute increase since 2007.**



## 3,917

**Decrease in employment positions.**





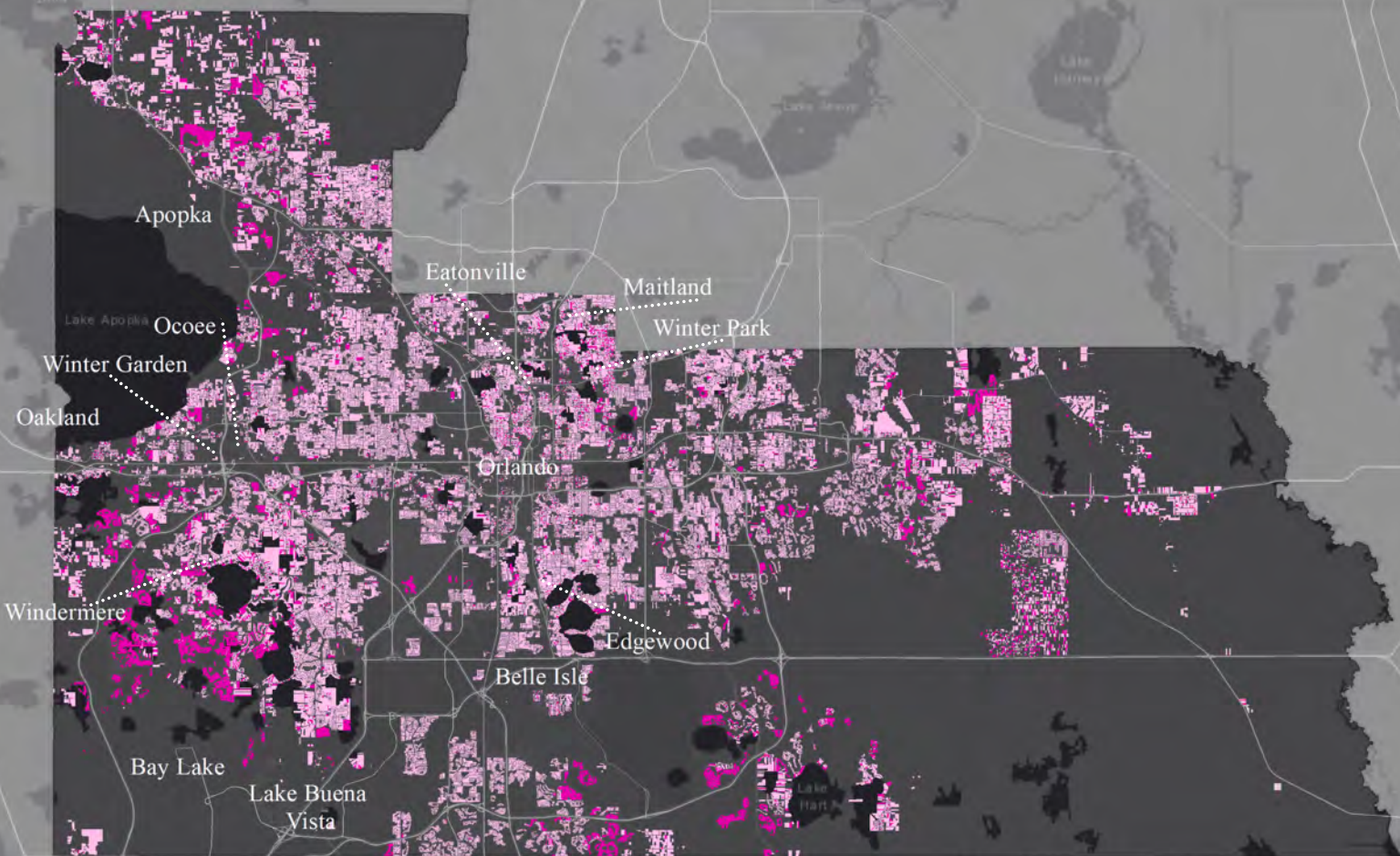




# 2007-2017 | URBAN GROWTH ORANGE COUNTY

## Legend

-  Growth before 2007
-  Growth 2007-2017



0 5 10 20 Miles

Source: County Property Appraiser Offices

Esri, HERE, Garmin, (c) OpenStreetMap contributors, and the GIS user community

# Orange County

COUNTY SNAPSHOT 2007-2017



## OVERVIEW

Orange County is the regions most populous county and includes the City of Orlando, as well as twelve other incorporated cities. The area is known for its many tourist attractions and innovation industries. From 2007-2017 an additional 282,862 residents have moved to the county. The 2050 HSWG data predicted a 25% increase in population growth by 2017, whereas actual data shows a 27% increase.

## MAJOR DEVELOPMENTS

AMWAY CENTER  
CAMPING WORLD STADIUM RENOVATION  
CREATIVE VILLAGE  
HORIZON WEST  
LAKE NONA / MEDICAL CITY  
OCSC SOCCER STADIUM  
UCF DOWNTOWN CAMPUS  
USTA NATIONAL CAMPUS (LAKE NONA)

## 2007-2017 Population Growth



**25%**

Predicted county growth  
based on 2050 projection

**27%**

Actual county growth

**282,862**

New residents

**5%**

Increase in overall water  
consumption



# DEVELOPMENT OVERVIEW

66,108

Increase in number of households

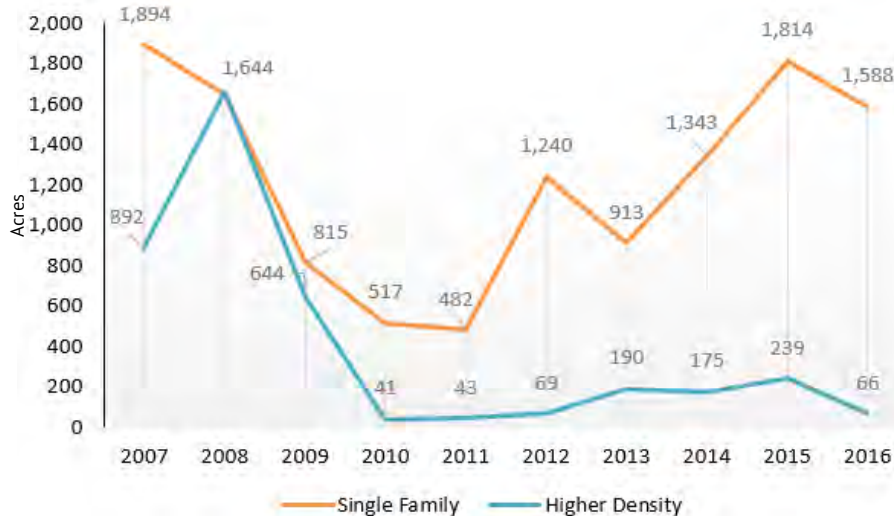
\$3,006

Increase in median household income



Source: unclermikesmusings.com

2007-2017 Residential Development



\*2017 data not available

12,314

Additional acres dedicated to single family housing

4,025

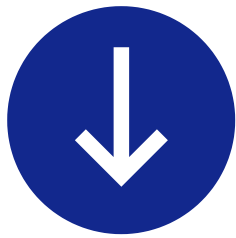
Additional acres dedicated to high density housing

# TRANSPORTATION & EMPLOYMENT OVERVIEW



## 130,855

**Increase in the number of vehicles (equivalent to 1.5% increase in 10 years).**



## 31.9

**2017 Vehicle miles of travel (per person) - 0.56 mile decrease since 2007.**



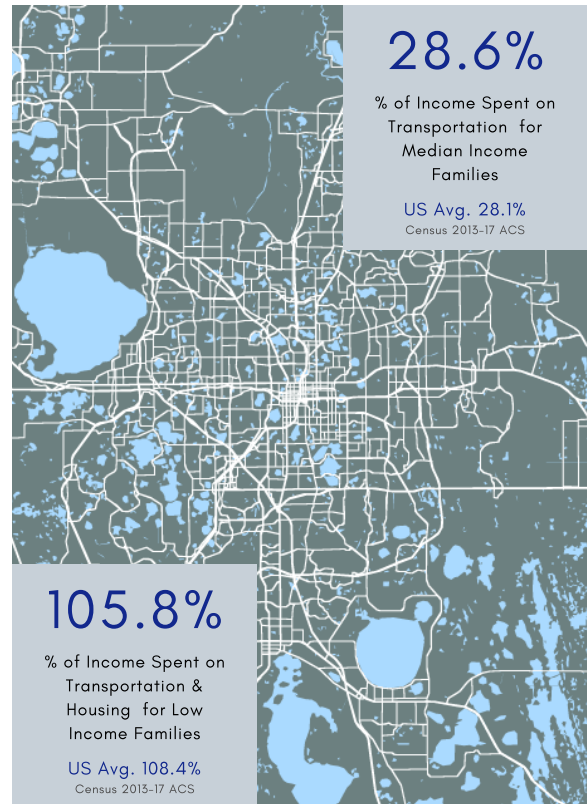
## 28.7

**2017 Average commute time - 2 minute increase since 2007.**



## 132,796

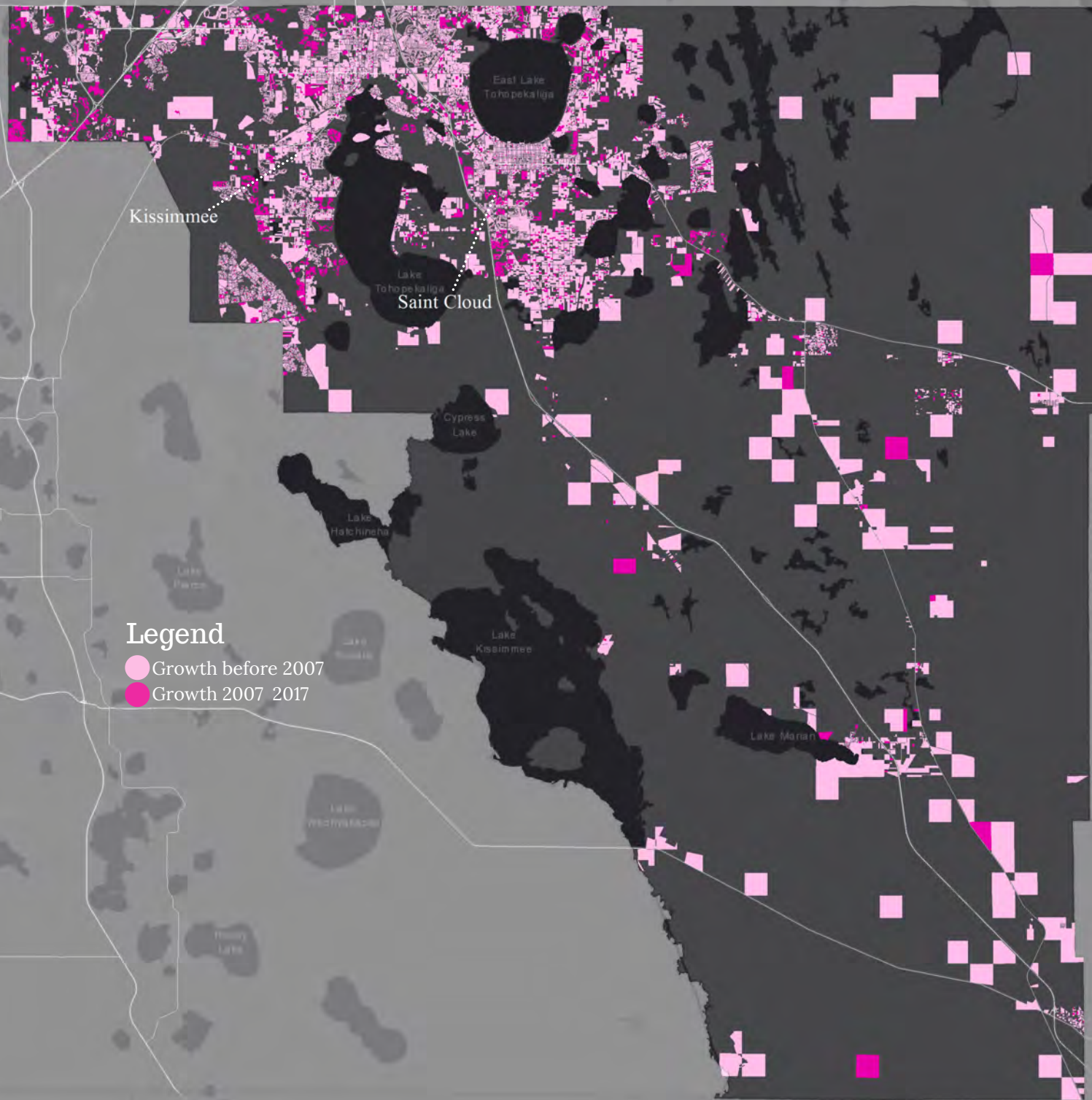
**Increase in employment positions.**







# 2007-2017 | URBAN GROWTH OSCEOLA COUNTY



## Legend

- Growth before 2007
- Growth 2007-2017

0 5 10 20 Miles

Source: County Property Appraiser Offices

Esri, HERE, Garmin, (c) OpenStreetMap contributors, and the GIS user community

# Osceola County

COUNTY SNAPSHOT 2007-2017



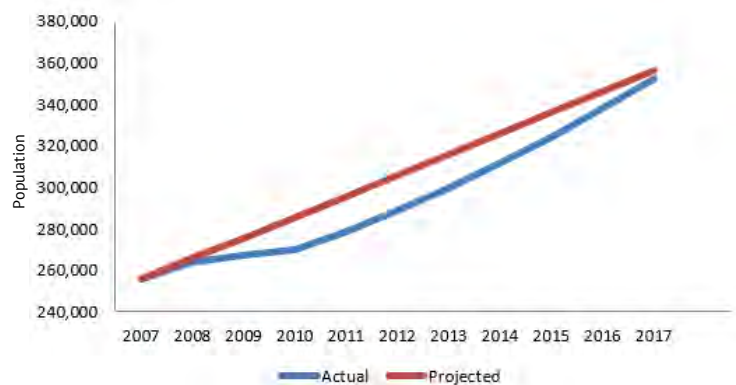
## OVERVIEW

Osceola County is known for its large portion of ranch lands and undeveloped prairie, woods and marsh. The City of Kissimmee and St. Cloud are the county's main urban areas with the exception of a few rural towns. From 2007-2017 an additional 96,622 residents have moved to the county. The 2050 HSWG data predicted a 39% increase in population growth, whereas actual data shows a 38% increase.

## MAJOR DEVELOPMENTS

AUSTIN-TINDALL SPORTS COMPLEX  
BRIDG HIGH TECH FACILITY  
KISSIMMEE LAKEFRONT PARK  
SUNRAIL STATION DEVELOPMENT  
TUPPERWARE HQ (APPROVED)

## 2007-2017 Population Growth



Source: US Census

**39%**

Predicted county growth  
based on 2050 projection

**38%**

Actual growth

**96,622**

New residents

**20%**

Increase in overall water  
consumption



# DEVELOPMENT OVERVIEW

9,009

Increase in number of households

\$1,430

Increase in median household income



2007-2017 Residential Development



5,216

Additional acres dedicated to single family housing

488

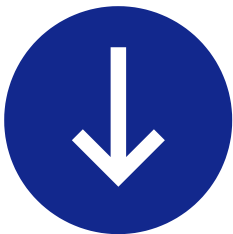
Additional acres dedicated to high density housing

# TRANSPORTATION & EMPLOYMENT OVERVIEW



64,059

Increase in the number of vehicles (equivalent to 3% increase in 10 years).



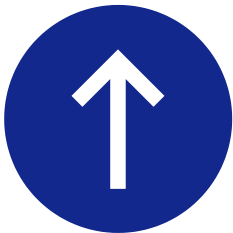
32.4

2017 Vehicle miles of travel (per person) - 3.92 mile decrease since 2007.



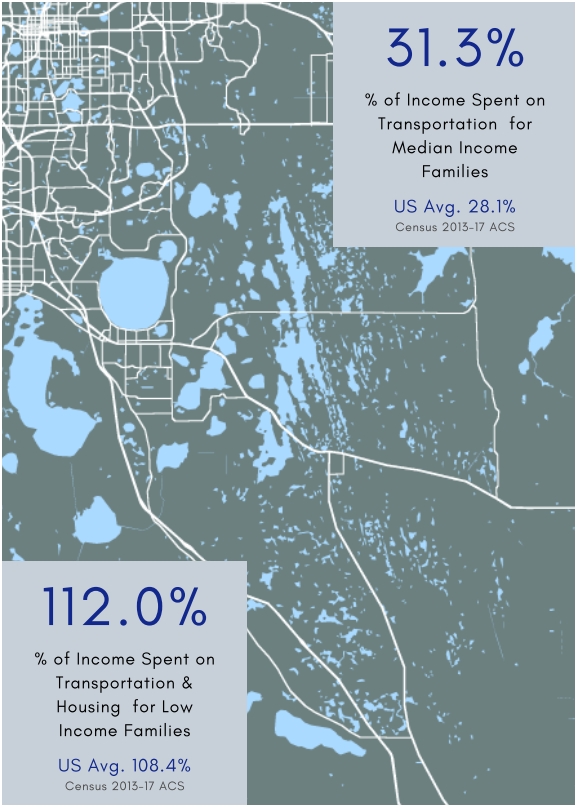
34

2017 Average commute time - 3.8 minute increase since 2007.



35,604

Increase in employment positions.



Source: Orlando Business Journal

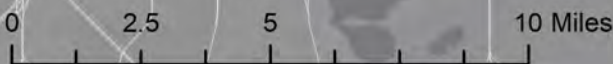
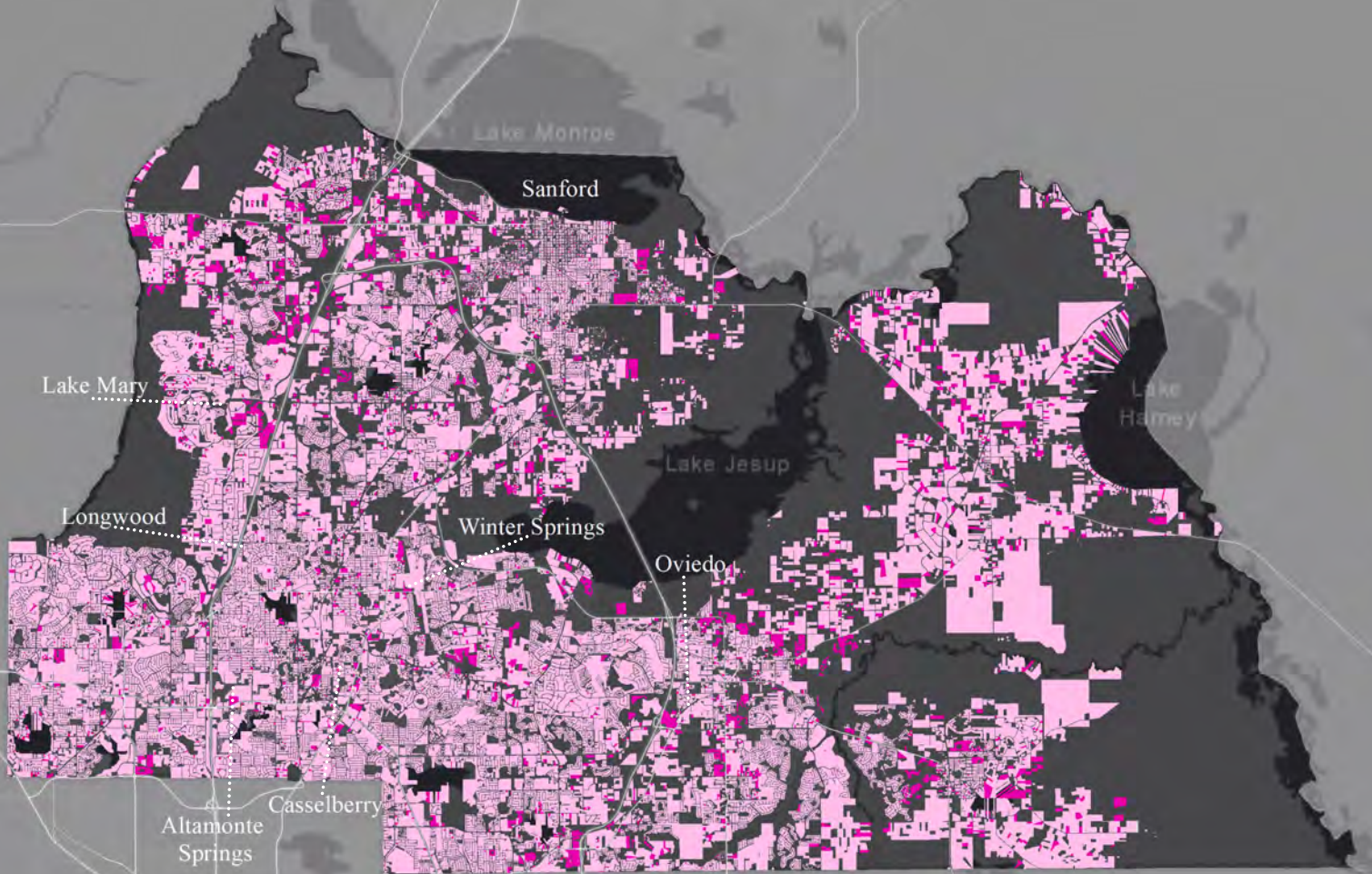




# 2007-2017 | URBAN GROWTH SEMINOLE COUNTY

## Legend

- Growth before 2007
- Growth 2007-2017



# Seminole County

COUNTY SNAPSHOT 2007-2017



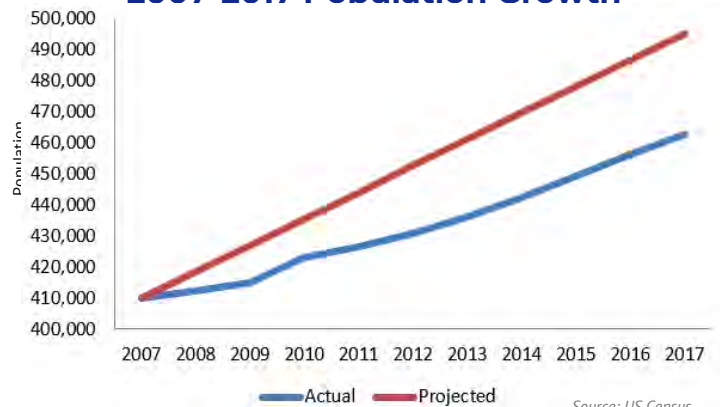
## OVERVIEW

Seminole County has grown 13% in population since 2007 and has been the location for a number of mixed-use developments tied to SunRail since the commuter rail line's 2014 inception. Cities along the transit network have begun to develop in higher densities, while off-network such as Winter Springs have implemented mixed-use downtown master plans.

## MAJOR DEVELOPMENTS

CASSELBERRY DEVELOPMENT  
CRANES ROOST PARK DEVELOPMENT  
SANFORD RIVERWALK  
SUNRAIL STATION DEVELOPMENT  
WINTER SPRINGS TOWN CENTER

## 2007-2017 Population Growth



**21%**

Predicted county growth  
based on 2050 projection

**13%**

Actual county growth

**52,640**

New residents

**1%**

Increase in overall water  
consumption



## DEVELOPMENT OVERVIEW

23,458

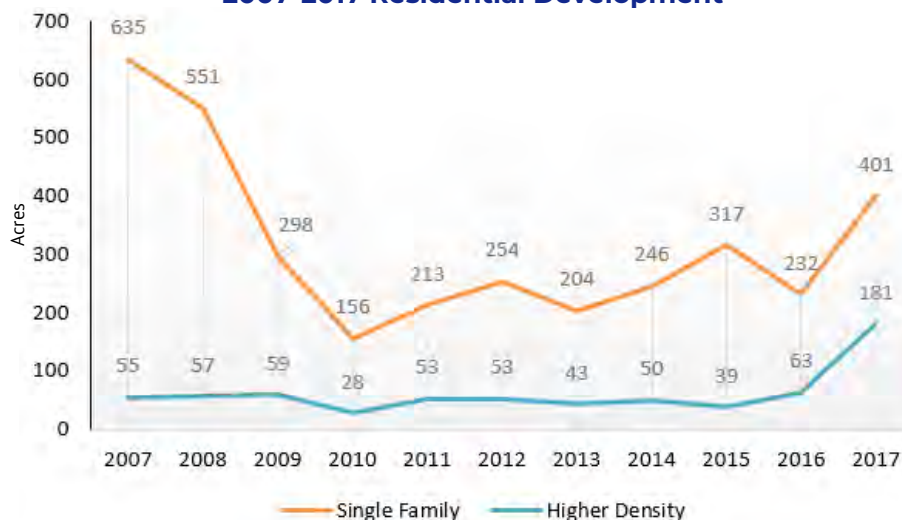
Increase in number of  
households

\$8,038

Increase in median  
household income



2007-2017 Residential Development



3,507

Additional acres  
dedicated to single family  
housing

681

Additional acres  
dedicated to high density  
housing

# TRANSPORTATION & EMPLOYMENT OVERVIEW



## 17,761

**Increase in the number of vehicles (equivalent to 0.5% increase in 10 years).**



## 25.1

**2017 Vehicle miles of travel (per person) - 0.47 mile increase since 2007.**



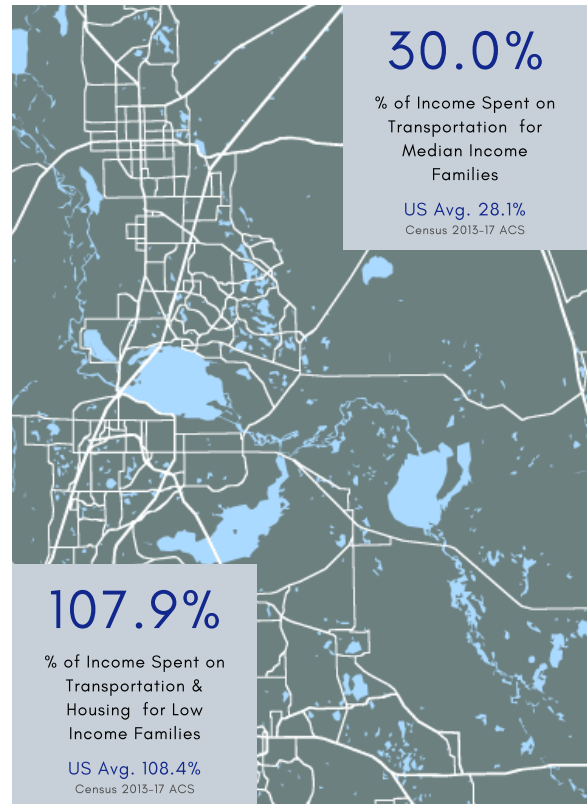
## 27.5

**2017 Average commute time - 2.3 minute increase since 2007.**



## 11,578

**Increase in employment positions.**









# 2007-2017 | URBAN GROWTH SUMTER COUNTY

## Legend

-  Growth before 2007
-  Growth 2007-2017

0 2.5 5 10 Miles

# Sumter County

COUNTY SNAPSHOT 2007-2017



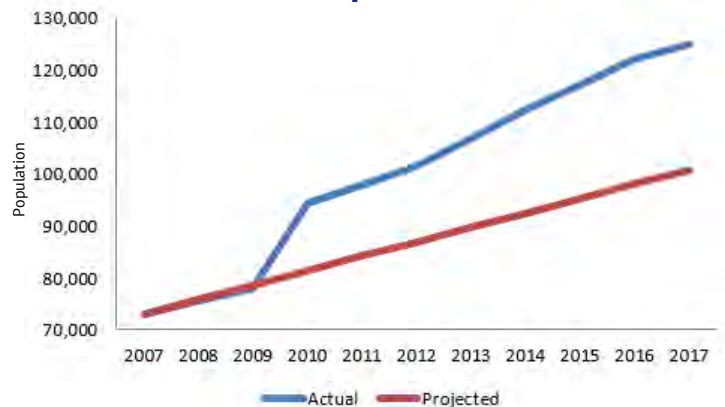
## OVERVIEW

Sumter County is rural in nature but has seen explosive population growth in a portion of the county as The Villages master plan has been implemented. The 71% increase in population observed from 2007 to 2017 vastly exceeds the projected figure of 38%.

## MAJOR DEVELOPMENTS

LAKE DEATON AREA DEVELOPMENTS  
THE VILLAGES GENERAL DEVELOPMENT

## 2007-2017 Population Growth



Source: US Census

**38%**

Predicted county growth  
based on 2050 projection

**71%**

Actual county growth

**52,120**

New residents

**48%**

Increase in overall water  
consumption



# DEVELOPMENT OVERVIEW

19,391

Increase in number of households

\$12,037

Increase in median household income



2007-2017 Residential Development



4,430

Additional acres dedicated to single family housing

40

Additional acres dedicated to high density housing

# TRANSPORTATION & EMPLOYMENT OVERVIEW



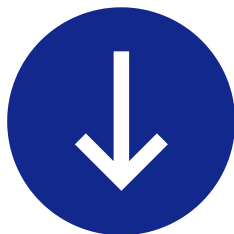
## 34,508

**Increase in the number of vehicles (equivalent to 5.5% increase in 10 years).**



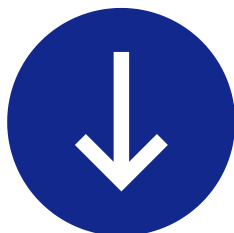
## 42.8

**2017 Vehicle miles of travel (per person) - 0.15 mile increase since 2007.**



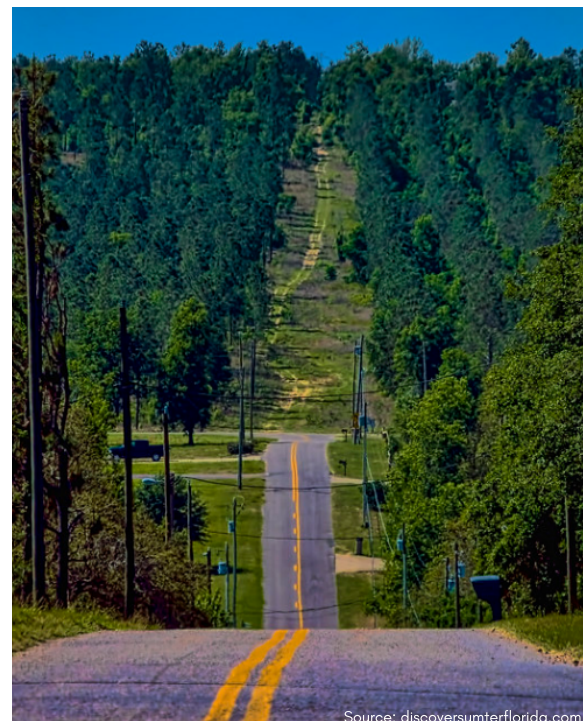
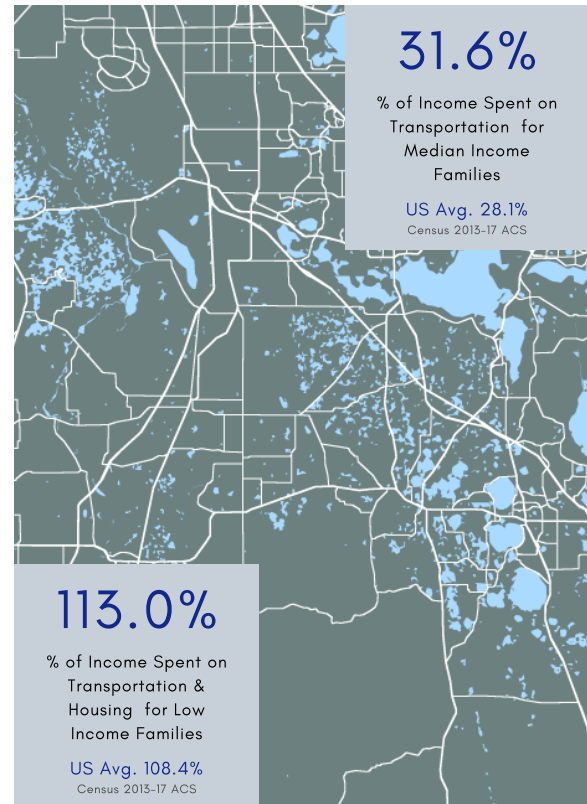
## 26.4

**2017 Average commute time - 2.96 minute decrease since 2007.**



## 1,925

**Decrease in employment positions.**



Source: [discoversumterflorida.com](http://discoversumterflorida.com)





# 2007-2017 | URBAN GROWTH VOLUSIA COUNTY

Flagler Beach

Ormond Beach

Holly Hill

Daytona Beach

Daytona Beach Shores

Port Orange

Ponce Inlet

New Smyrna Beach

Edgewater

South Daytona

Lake Helen

Deland



Orange City

Deltona

DeBary

Oak Hill

## Legend

-  Growth before 2007
-  Growth 2007-2017

0 5 10 20 Miles

Source: County Property Appraiser Offices

Esri, HERE, Garmin, (c) OpenStreetMap contributors, and the GIS user community

# Volusia County

COUNTY SNAPSHOT 2007-2017



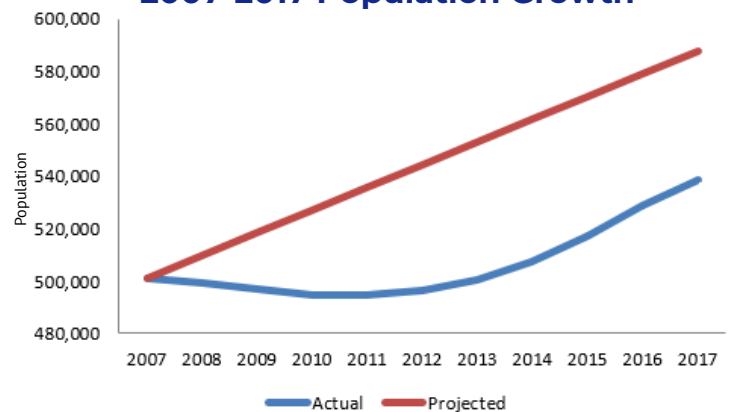
## OVERVIEW

Volusia County has grown 8% in population since the 2007 *How Shall We Grow* report was published. The County has seen considerable growth in annual household income (\$4,625) and has adopted resiliency initiatives in-line with the 2060 Strategic Regional Policy Plan.

## MAJOR DEVELOPMENTS

DEBARY SUNRAIL STATION  
EMBRY RIDDLE RESEARCH FACILITY  
INTERNATIONAL SPEEDWAY UPGRADES  
LATITUDE MARGARITAVILLE

## 2007-2017 Population Growth



Source: US Census

17%

Predicted county growth  
based on 2050 projection

8%

Actual county growth

37,727

New residents

16%

Increase in overall water  
consumption



# DEVELOPMENT OVERVIEW

17,176

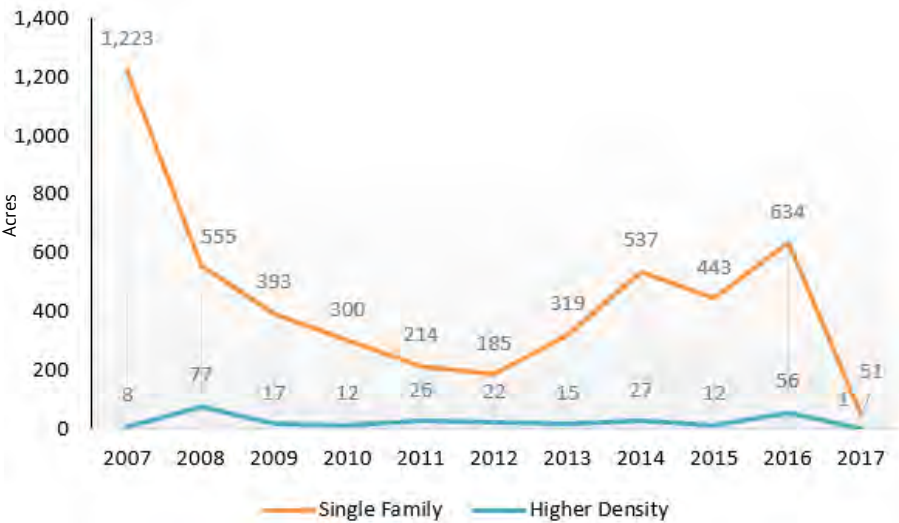
Increase in number of households

\$4,625

Increase in median household income



2007-2017 Residential Development



4,854

Additional acres dedicated to single family housing

273

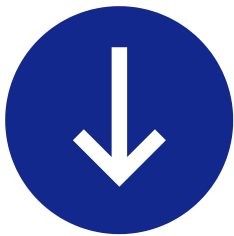
Additional acres dedicated to high density housing

# TRANSPORTATION & EMPLOYMENT OVERVIEW



## 3,831

**Increase in the number of vehicles (equivalent to 0.1% increase in 10 years).**



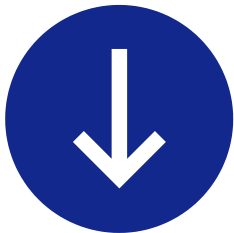
## 31.3

**2017 Vehicle miles of travel (per person) - 0.7 mile decrease since 2007.**



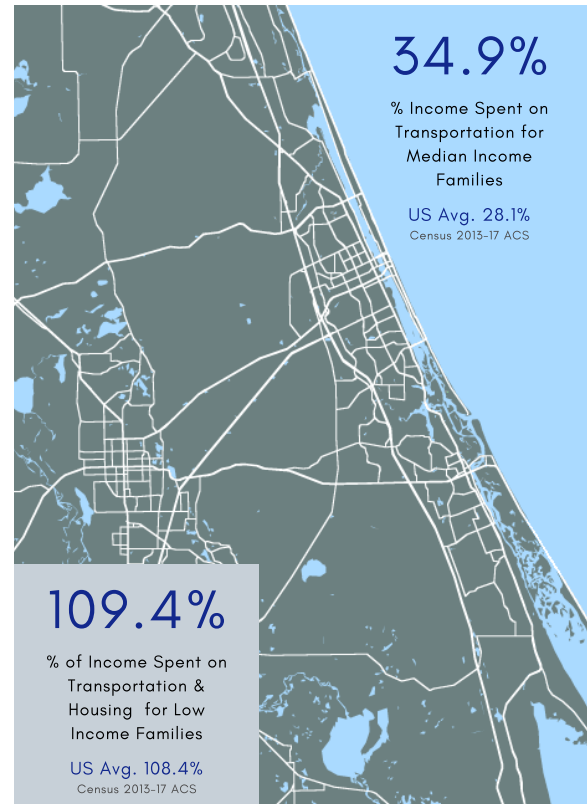
## 27.2

**2017 Average commute time - 3.5 minute increase since 2007.**



## 1,260

**Decrease in employment positions.**



Source: deland.org



# THE FOUR CORNERS

## *POLK COUNTY*

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Polk County is located in between the Orlando and Tampa metro areas and was previously included in the *How Shall We Grow* analysis.

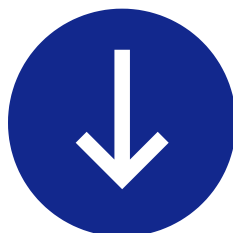
While not located within the East Central Florida Regional Planning Council or MetroPlan Orlando coverage areas, development in Polk County is partially driven by the close proximity of the Orlando area attractions and resorts as well as the City of Kissimmee.

The following data outlines critical growth trends in Polk County from 2007 to 2017.



30,038

**Increase in  
Population**



-10%

**Decrease in overall  
water consumption**



9.3%

**Percent increase in  
population**



18.8

**Increase in land  
consumption (sqmi)**



2.5

**Increase in average  
commute time (minutes)**



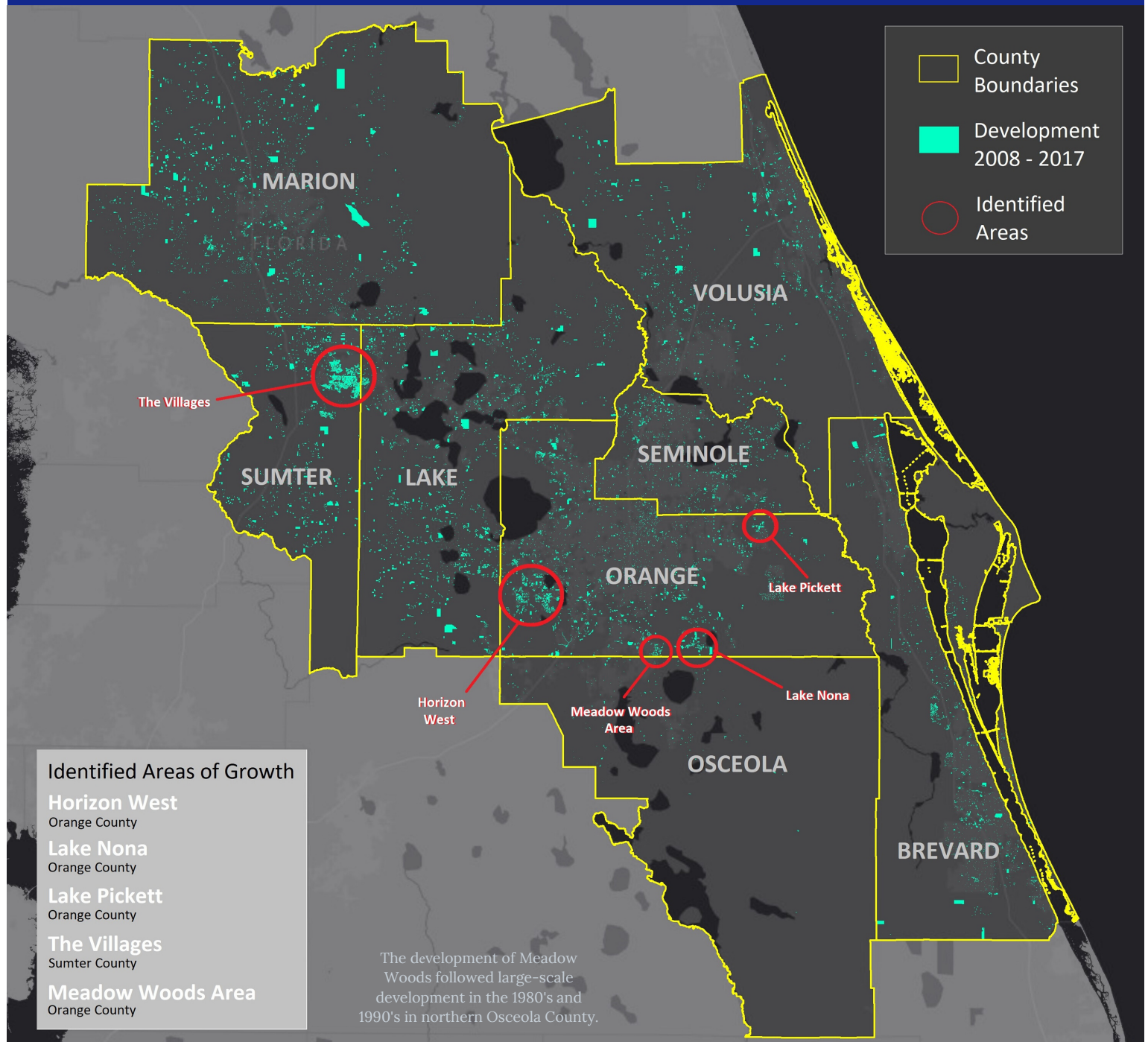
0.9%

**Median Household  
Income**

## FINDINGS

# DISPROPORTIONATE GROWTH ALONG COUNTY LINES

This map highlights areas that are developing disproportionately (by one county) close to county lines





# WHAT NEXT?

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A DECADE OF GROWTH IN EAST CENTRAL FLORIDA

Please take the survey at the following link to guide the recommendations section of this report:

<https://hdwg.metroquest.com>



