Hillsborough County 2045
Population and Employment
Projections and Allocations

Project Update

Board of County Commissioners
February 13, 2018

What will Hillsborough County look like in 25 years?

• Working with County and City Staff and other stakeholders to determine:
  ▪ Where will we grow?
  ▪ How will we grow?
  ▪ What does this mean for...
    – Transportation?
    – Housing?
    – Infrastructure?
    – Schools?
Current Trends

Trend analysis and planning assumptions

Land use

Development Activity

Policy

Demographics

2045 Population and Employment Projections
Land Use Trends

Developable Land

Source: Land use, building value, and land value are reported in Hillsborough County Property Appraiser parcel database.

Land Use Trends

Redevelopment Potential

Source: Land use, building value, and land value are reported in Hillsborough County Property Appraiser parcel database.
Land Use Trends
Developed land: Present

49,600 acres
Vacant, developable and redevelopable land within the Urban Services Area.

Development
- 1960
- 1970
- 1980
- 1990
- 2000
- 2010
- Present

Source: Hillsborough County MPO

Buildout population and employment

2045 control total (2,007,100)
2045 control total (1,284,500)

Population
- Existing
- Buildout

Employment
- Existing
- Buildout

2045 control total (1,265,800)
830,500

1,293,300
1,841,100
# 2045 Population and Employment Projections

## Totals by jurisdiction

<table>
<thead>
<tr>
<th>Placetype</th>
<th>Existing Population</th>
<th>Buildout Population</th>
<th>Change</th>
<th>Existing Employment</th>
<th>Buildout Employment</th>
<th>Change</th>
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</thead>
<tbody>
<tr>
<td>Tampa</td>
<td>347,900</td>
<td>468,600</td>
<td>120,700</td>
<td>35%</td>
<td>388,000</td>
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<tr>
<td>Hillsborough County</td>
<td>884,600</td>
<td>1,284,500</td>
<td>399,900</td>
<td>45%</td>
<td>597,600</td>
<td>195,600</td>
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<td>Temple Terrace</td>
<td>24,800</td>
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<td>3,300</td>
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<td>13,700</td>
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<tr>
<td>Plant City</td>
<td>35,500</td>
<td>59,200</td>
<td>23,700</td>
<td>67%</td>
<td>74,500</td>
<td>47,400</td>
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<td>Total</td>
<td>1,292,800</td>
<td>1,840,400</td>
<td>547,600</td>
<td>42%</td>
<td>830,800</td>
<td>435,100</td>
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</table>
How will the market respond?

- Pressure to expand Urban Services Area.
- Redevelopment.
- Infill and intensification.

Scenario Planning
Scenario Planning

Today

Current Trend

Alternative Path

Alternative Path

Transportation, land use, technology, etc.

Future

Scenario A

Scenario B

Imagine 2040 Scenarios

A. “Suburban Dream” (Trend)

Expand the growth boundary to make room for new suburbs. Extend roads & water lines, rebuild major intersections.

B. “Bustling Metro” (Rail & TOD)

Create new town centers in older commercial areas. Add rapid bus, rail, circulator shuttles, walk/bike connections.

C. “New Corporate Ctrs.” (Exp. Lanes)

Create new corporate parks along major highways. Add new express toll lanes in the interstates (I-4, I-75, I-275)
Possible Scenarios?

Regional Transit Feasibility Plan

- Blueprint for transit.
- Not yet formally adopted.
- Not yet funded.
Tampa Bay Next

• Ongoing process.
• Transportation action plan.
• Coordinated by FDOT.

Urban Land Institute I-4 Corridor Study

The Role of the Study Area

The Hole in the Doughnut?

• Centered on a very scarce asset - major transportation corridor
• But encompasses another scarce asset - Tampa Bay's unique land character
• Largest unexploited area = current developed area? What's the measure?
• Demonstration for how Hillsborough County wants to look in the future
• Important because how this region grows affects its regional competitiveness
Regionally coordinated

- What happens in Pinellas and Pasco impacts Hillsborough.
- Vice versa.
- Tampa Bay TMA.

What can scenarios tell us?
How much growth can we accommodate?

- Total number of jobs.
- Total number of people.

Will transit work in Hillsborough County?

- People within a 30 minute transit commute of employment centers.
- People with each access to transit.
- Premium, high frequency and local transit.
Are walking and cycling possible?

- Number of people with access to active transportation facilities.
- Number of homes and jobs in walkable places.

Are commutes getting longer or shorter?

- Number of people within a 30-minute drive of employment centers.
- Average travel time.
How much will it cost?

- New highways and streets.
- New infrastructure.
- Public services.

How vulnerable are we?

- Total people in coastal hazard areas.
- Total people in flood prone areas.
How well can we maintain natural habitat, natural resources, rural lands, etc.?

• Impacts to open space, agricultural land, critical habitats.
• Total impervious surface.

Schedule and Process

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<th>2017</th>
<th>2018</th>
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<tr>
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- Background Research
- Trend Scenario
- Alternative Scenarios
- Public Outreach
- Hybrid Scenario
- Project Complete
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