

2020



NASSAU COUNTY
Planning Department
FLORIDA

Nassau County, Florida Growth Trends Report

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Context Statement

While 2020 has been anything but typical, the fact remains that Nassau stands at the precipice of change. A change that will descend upon the community with or without blessing. According to the latest population estimates from the U.S. Census Bureau, Nassau grew by 3.25% last year (2018-2019)¹. For perspective, out of 3,141 counties in the United States, Nassau ranked as the 40th fastest-growing county by percent growth for counties in the U.S. with a population over 10,000 ¹⁹. This growth rate places Nassau in the top 1.5% of all counties in the Country.

According to the US Census Bureau¹⁵, within the State of Florida, Nassau ranked as the 5th fastest growing county from 2018-2019 (by %). For counties in the State with a population over 80,000, Nassau ranked 2nd fastest growing¹⁵ (by %) following only behind St. Johns County. Over the coming decade (2020-2030), the Florida Bureau of Economic and Business Research (BEBR) predicts Nassau will be the seventh fastest growing county in the State of Florida (by %) with a projected population expansion of 36.5% resulting in over 116,100 people calling Nassau home by 2030⁸.

Even so, population expansion is only part of the story. Along with more people comes additional development in the form of stores, roads, schools and other improvements to support the increased population base. According to a joint study of the Florida Department of Agriculture and Consumer Services, University of Florida Geoplan Center and 1000 Friends of Florida, by 2070 roughly a third more of Northeast Florida's open spaces and agricultural lands will be urbanized (developed)¹³.

However, unlike many communities, Nassau has been granted an opportunity that most never had, an opportunity to actively craft their future. The question remains: **What will we do with the opportunity?**

In this era of transition it is crucial that we promote a collaborative, inclusive and community-based approach to governance that places quality-of-life and generational sustainability at the apex of decision making. We must place people at the center of planning, policy and design decisions. In doing so, champion an agenda that values maintaining the unique character of Nassau so that generations to come will know the place we have all come to love. Ultimately, Nassau is what we make it. As such, I offer the following:

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



PS. If you have a few minutes, visit the below pages and explore some of the existing initiatives underway in Nassau County.

Taco E. Pope, AICP
Asst. County Manager
Nassau County, FL



www.nassaucountyfl.com/587/Recreation-Planning



www.nassaucountyfl.com/840/Western-Nassau-Heritage-Preservation-Com



<http://www.nassaucountyfl.com/860/William-Burgess-Overlay-District>



<http://www.nassaucountyfl.com/951/A1ASR200-Corridor-Design-Plan>

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DEMOGRAPHICS | POPULATION

FOOTNOTE REFERENCES FOUND ON BACK PAGE

Population and demographic statistics offer valuable insight into the existing and historical conditions of Nassau County. This information depicts a snapshot in time and provides a better understanding of the community, its long-term history, and how Nassau County has changed over time. The empirical data in this section allows for us to analyze trends and make educated predictions regarding our future. This data also allows us to assess and compare Nassau County growth trends to that of the northeast Florida region, the state, and the country.

85,070³

FULL TIME POPULATION

UNINCORPORATED AREA: 67,804³
(US CENSUS BUREAU ESTIMATES
88,625¹ PERSONS FOR 2019)

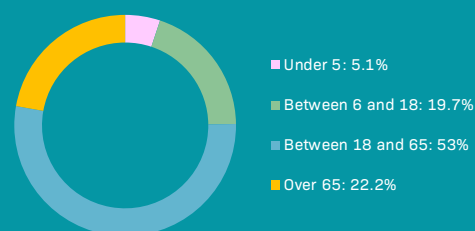
44.5¹⁶ NASSAU

42.5¹⁷ FLORIDA

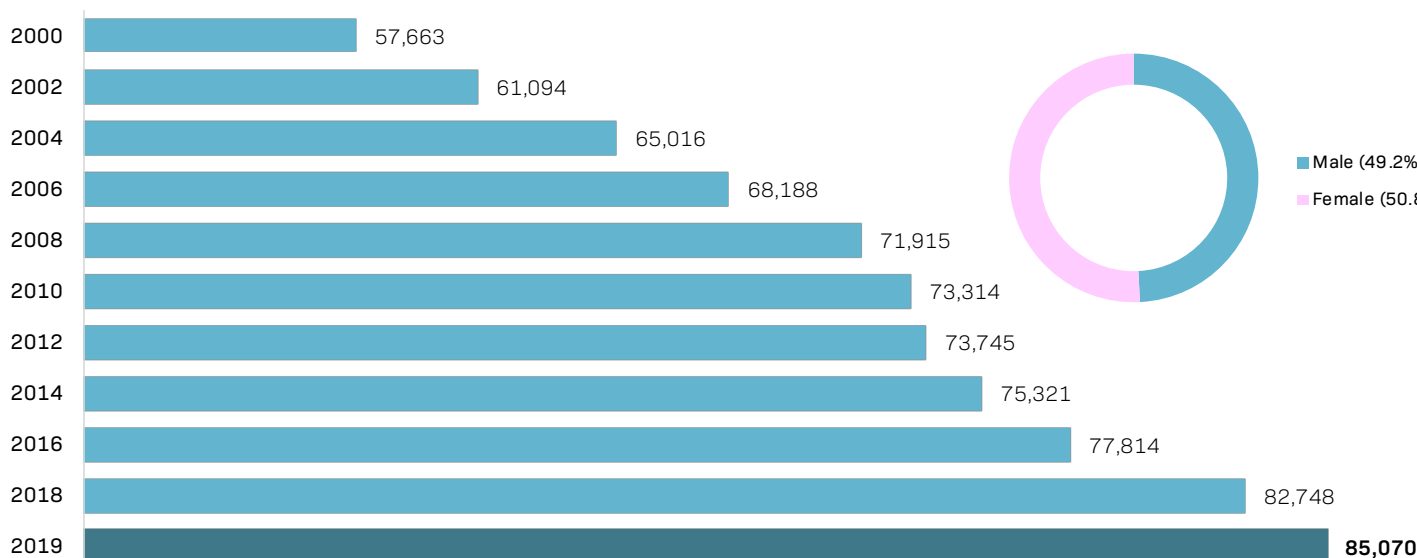
38.4¹⁸ UNITED STATES

MEDIAN AGE 2019

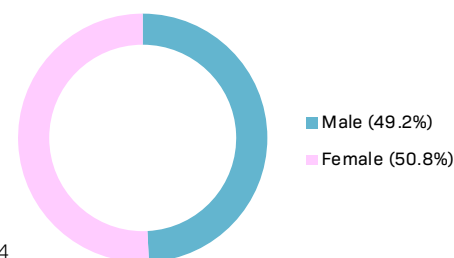
GRAPH 1: AGE IN NASSAU COUNTY BY % OF POPULATION (2019)¹



GRAPH 2: POPULATION IN NASSAU COUNTY FROM 2000-2019 (BEBR)³



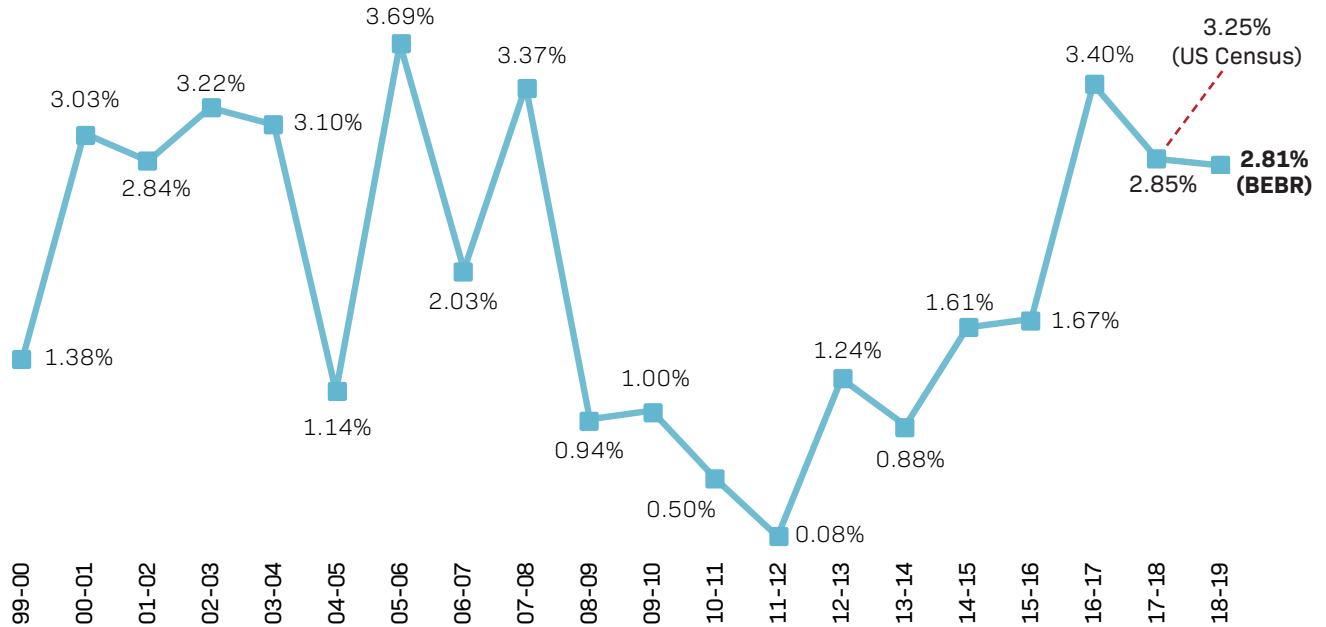
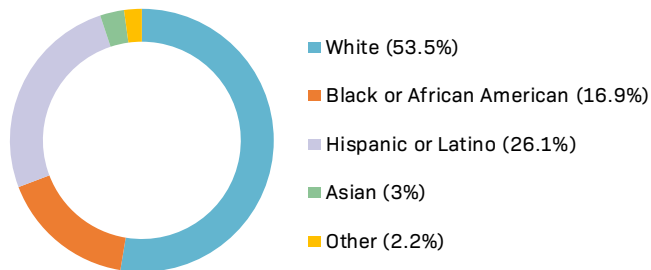
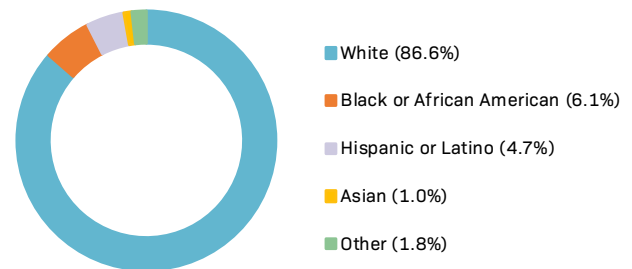
GRAPH 3: GENDER IN NASSAU COUNTY¹



See page 22 of this report for population projections.

According to the latest population estimates from the U.S. Census Bureau, Nassau grew by 3.25% last year.

Population Estimate	2018	2019	Percentage Increase
BEBR ³	82,748	85,070	2.81%
U.S. Census Bureau ¹	85,832	88,625	3.25%

GRAPH 4: ANNUAL POPULATION PERCENT CHANGE FROM 1999-2019 (BEBR)³

GRAPH 5: RACE IN FLORIDA 2019¹

GRAPH 6: RACE IN NASSAU COUNTY 2019¹

GRAPH 7: MEDIAN AGE IN NASSAU COUNTY FROM 2000-2019¹⁶

*Historically, the American Community Survey (ACS) was used to portray Median Age statistics for Nassau County (2000-2018). However, the ACS 2019 data will not be released until September 2020, therefore, the fluctuation in Median Age statistics, may be due to a change in the data source.

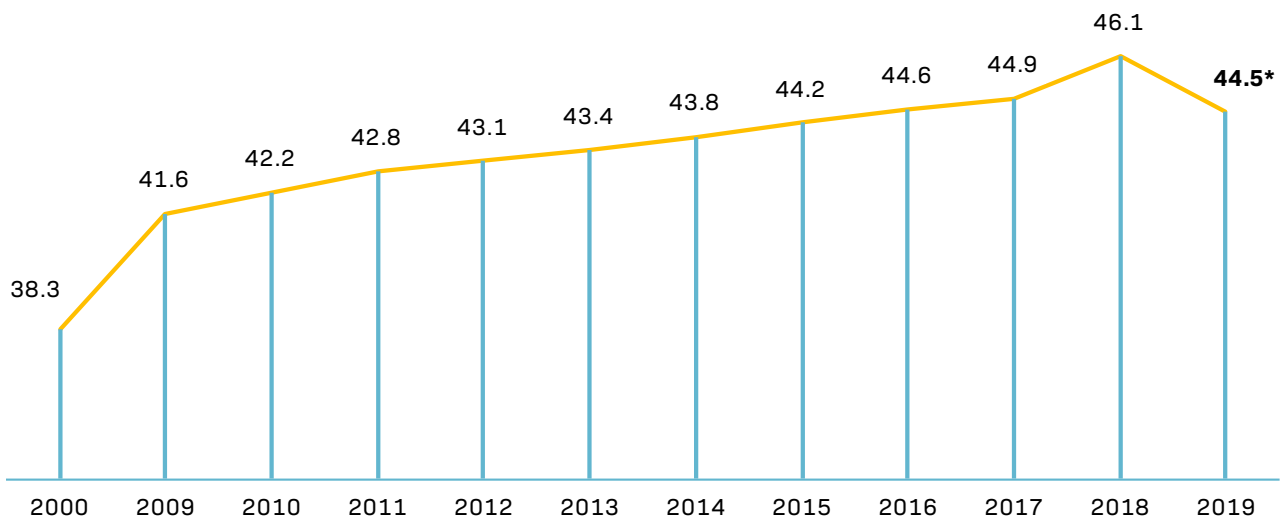
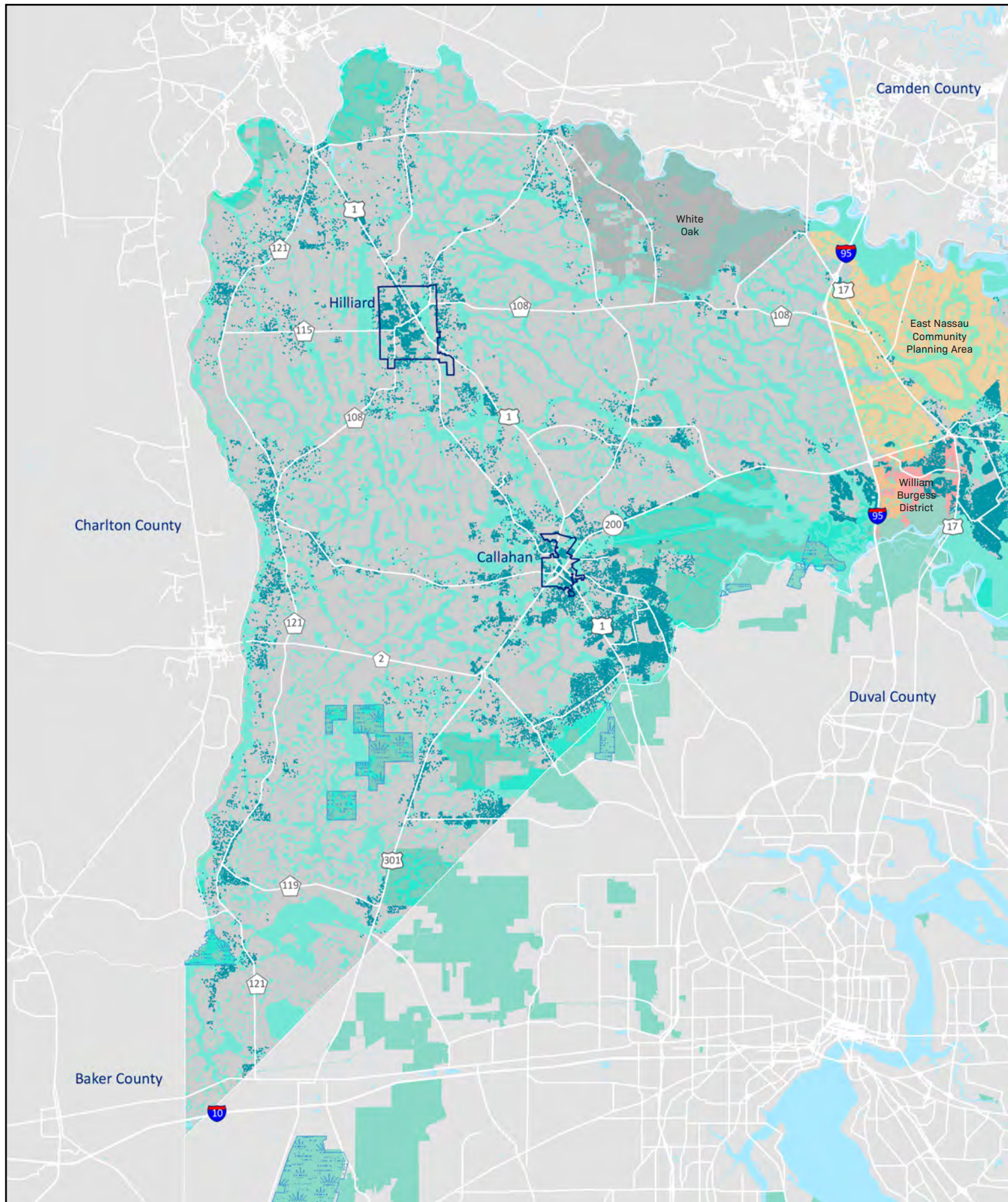


FIGURE 1: 2020 POPULATION DOT DENSITY



POPULATION DISBURSEMENT 2020

● 1 Dot = 1 Person*

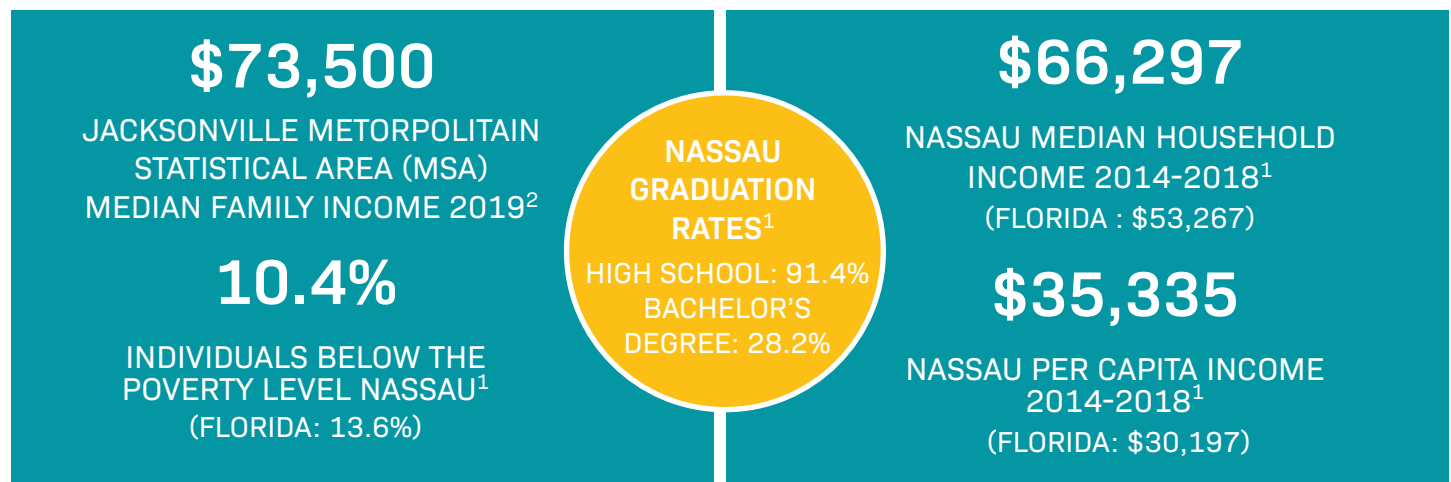


* Density disbursement is based upon 2020 parcel data. The dot density utilizes property use codes to locate existing dwelling units illustrating the disbursement of County citizens

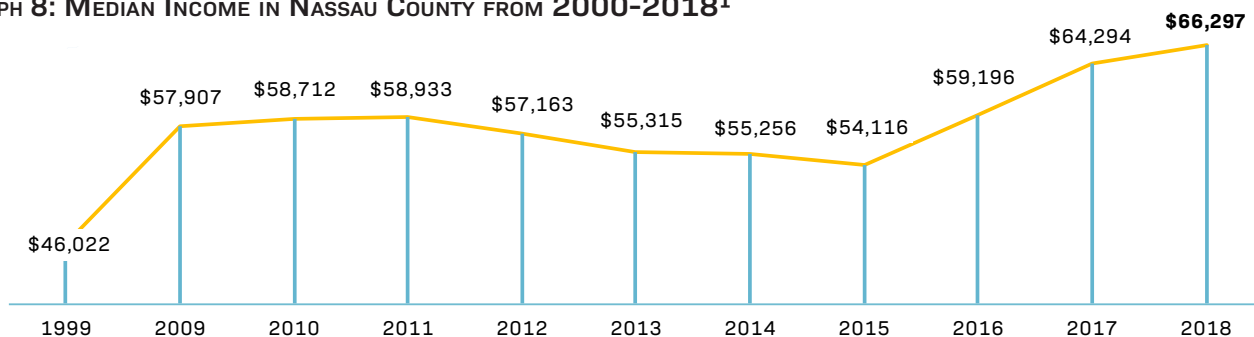
DEMOGRAPHICS | ECONOMICS

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. The Department of Housing and Urban Development (HUD) uses the median income for families in metropolitan and non-metropolitan areas to calculate income limits to determine for 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.²

Per Capita Income: The mean income computed for every person 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.²



GRAPH 8: MEDIAN INCOME IN NASSAU COUNTY FROM 2000-2018¹



Employment Information⁹

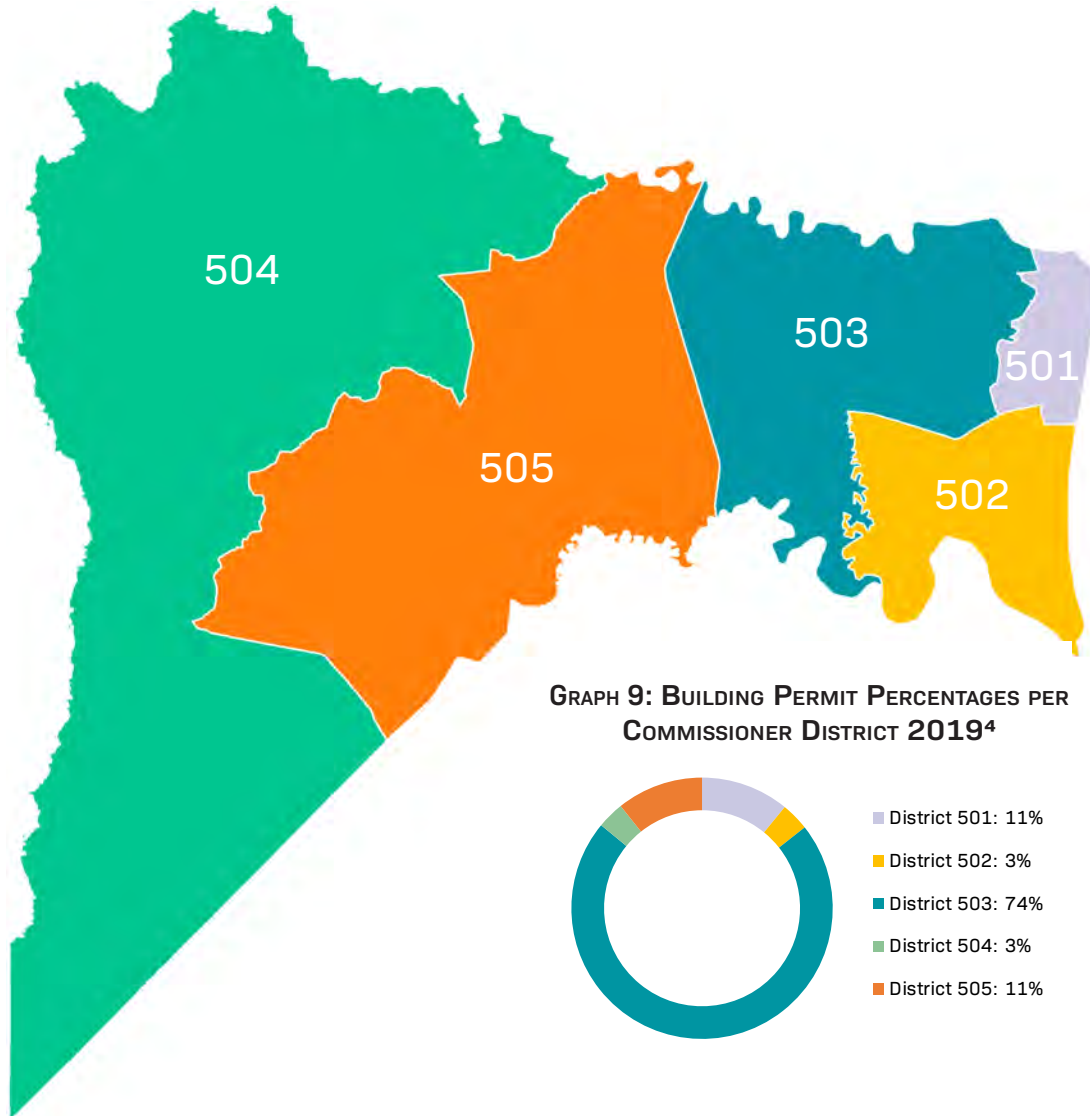
32,983	workers living in Nassau County
21,515	workers that live in Nassau County but are employed outside the County
65.2%	
30.2	minutes = mean travel time to work ¹
13,258	of the 21,515 workers who work outside Nassau work in Duval
21,188	workers that are employed in Nassau County
9,720	people live outside Nassau County but work in Nassau County
45.9%	of those working in Nassau County live outside Nassau County
11,468	workers live and work in Nassau County
73.5%	of the 11,468 workers living and working in Nassau County work in the service industry

COVID-19					Unemployment Rate - Nassau County
3%	2.8%	4.1%	12.4%	11%	
January	February	March	April	May	

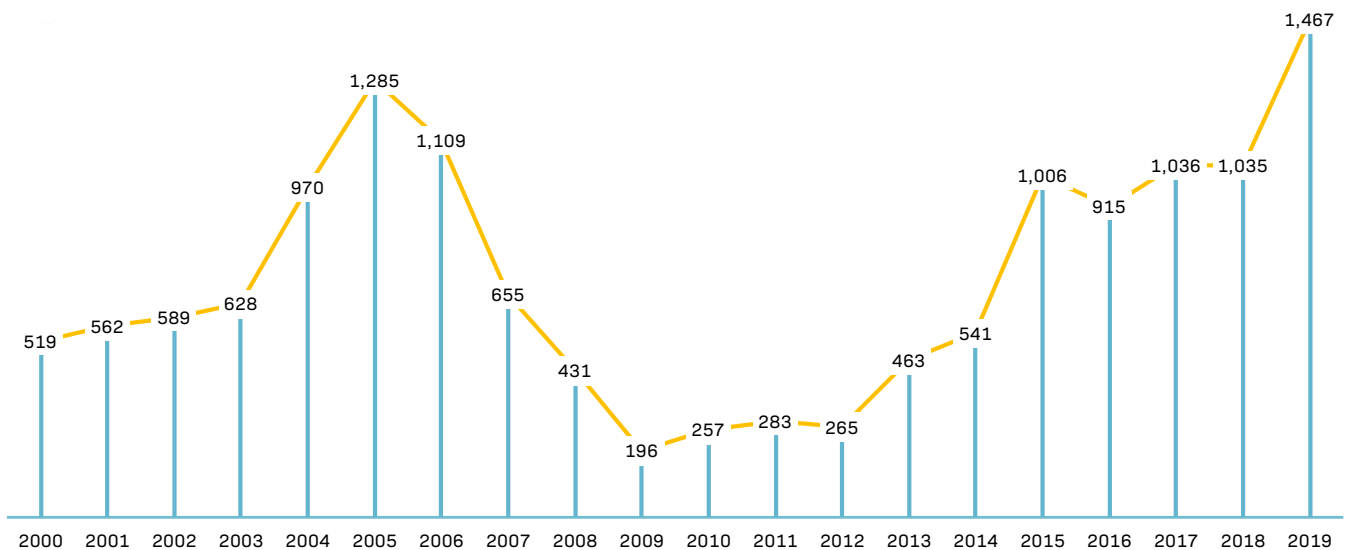
RESIDENTIAL GROWTH

In early 2019, the Nassau BOCC adopted a Housing Affordability Assessment as a policy tool. To learn more visit: www.nassaucountyfl.com/housing

FIGURE 2: NASSAU COUNTY COMMISSIONER DISTRICTS¹⁰



GRAPH 10: BUILDING PERMITS FOR NEW RESIDENTIAL DWELLING UNITS IN NASSAU COUNTY FROM 2000 TO 2019⁴



41,234

TOTAL HOUSING UNITS¹

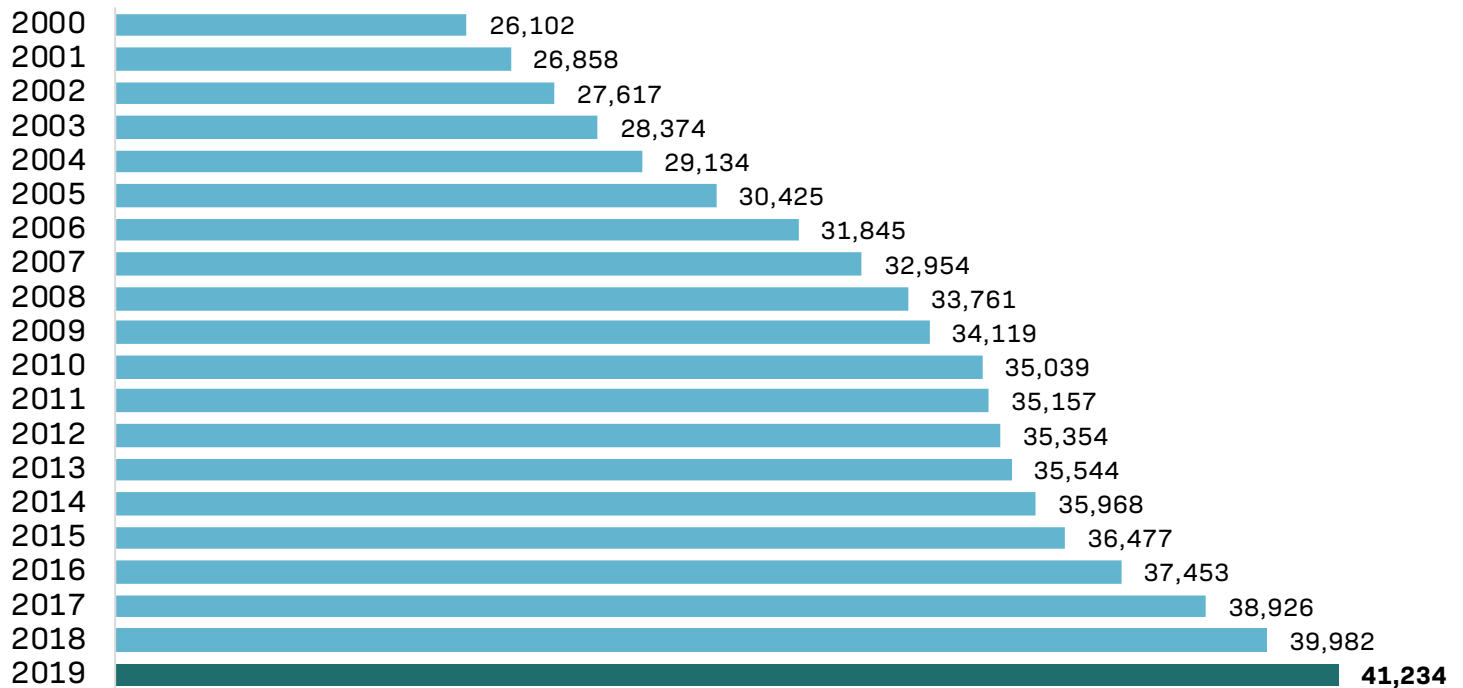
2.55

PERSONS PER HOUSEHOLD¹

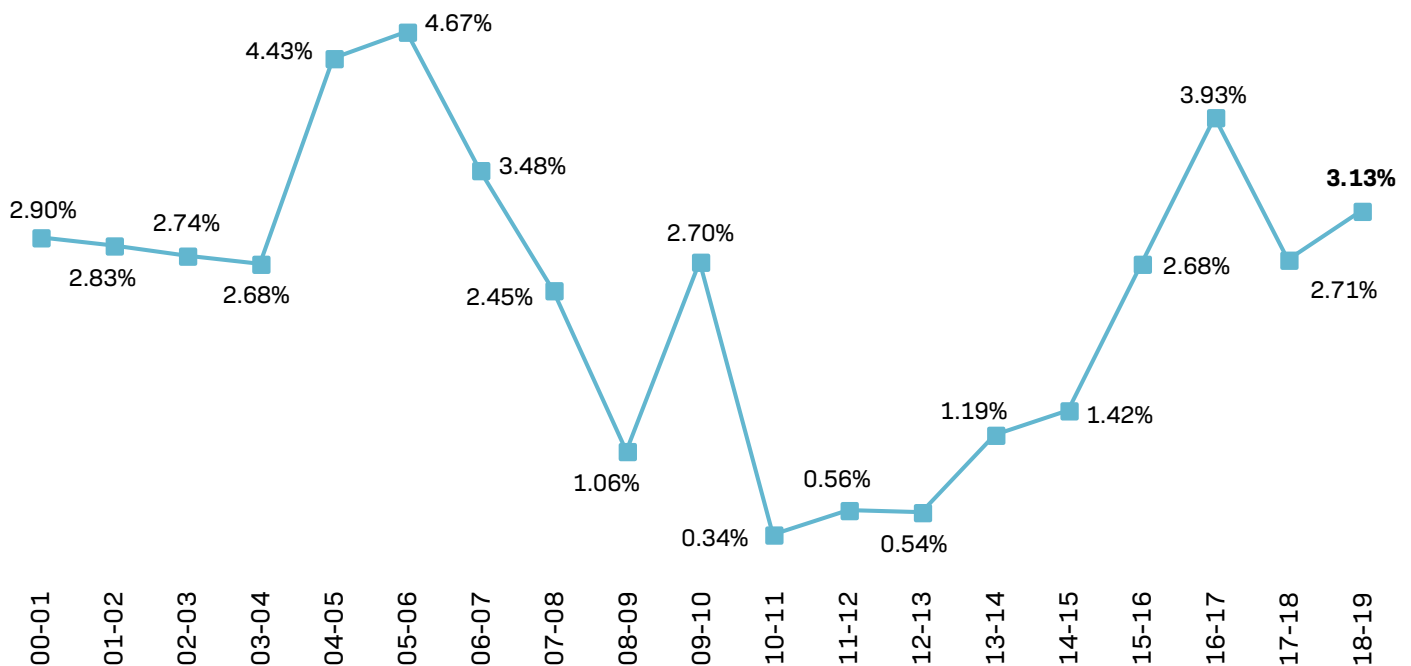
78.5%

OWNER OCCUPIED UNITS¹

GRAPH 11: TOTAL HOUSING UNITS IN NASSAU COUNTY FROM 2000-2019¹



GRAPH 12: PERCENT CHANGE IN TOTAL HOUSING UNITS FROM 2000-2019¹



RESIDENTIAL PROJECTS 2019-2020

(SF = SINGLE FAMILY) (MF=MULTI-FAMILY) (TH=TOWNHOME)

In Review are plats which are either currently under review, have preliminary approval, OR are residential or non-residential engineering projects (infrastructure plans only where no plat is required)

Approved Plats/Residential Projects are plats approved by BOCC & recorded; OR Engineering Plans (infrastructure plans) for Multi-Family approved by DRC (no plat required)

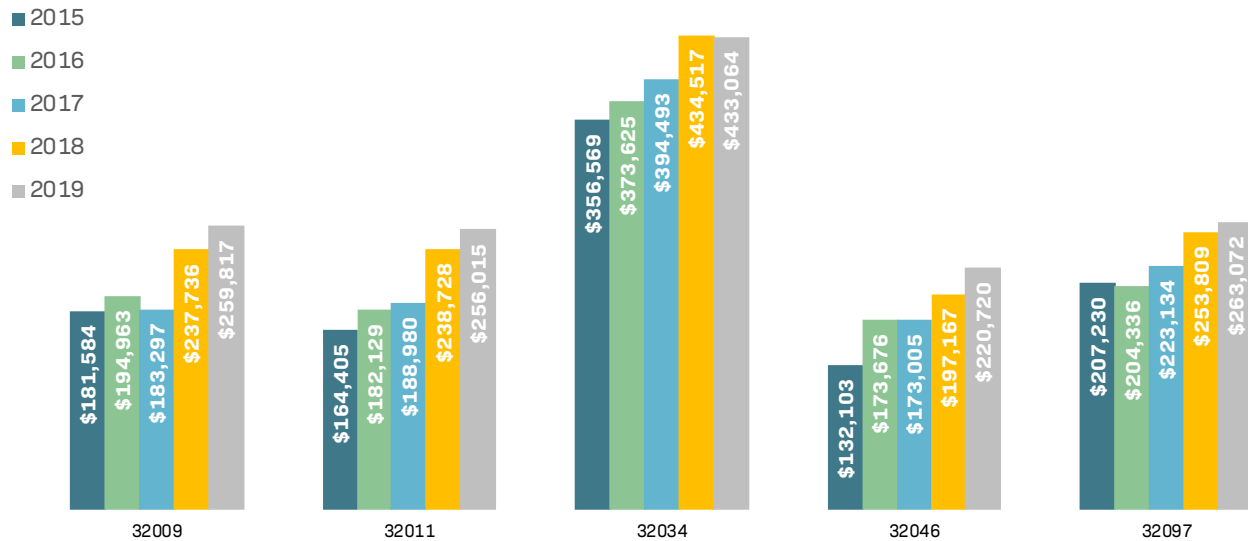
Total Residential Units Approved	1,596
Total Residential Units In Review	4,153

Planned Unit Development (PUD)/Preliminary Development Plan (PDP) in Review
Amelia Passage PUD
610 SF Lots
58 TH Units
324 MF Apartment Complex
Blackrock Cove PUD
105 SF Lots
48 TH Units
ENCPA - Wildlight PDP #3
570 SF Units
700 MF Units
150 Age-Restricted MF Units
415,000 sqft Non-Residential
Timbercreek PUD
56 MF Units
Final Development Plan (FDP) in Review
Amelia National Phase 1C
91 SF Lots
Hampton Lakes Phase 5 Modification
193 SF Lots
Final Development Plan (FDP) Approved
Concourse Crossing Phase 3
104 SF Lots
Enclave Phase 2
30 SF Lots
32 MF Units (Quadplex)
Nassau Station Modification Parcel A Phase 1
78 SF Lots
14 TH Units
Orange Avenue Path Phase 1
10' Multi-Use Path
River Glen (Phases 2-5)
688 SF Lots

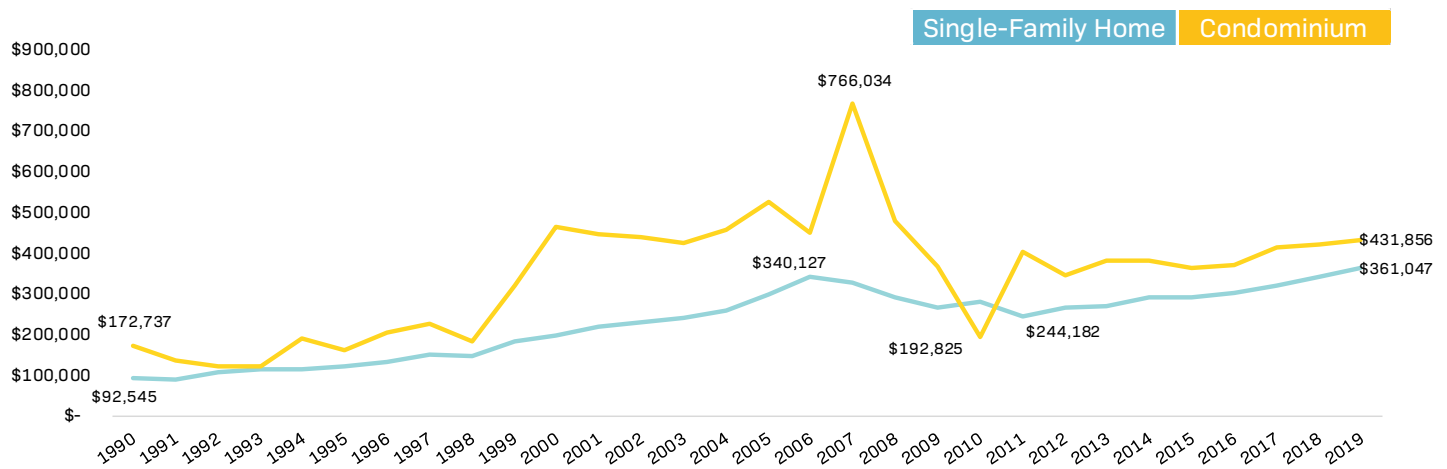
Approved Plats/Residential Projects	
Autumn Trace	2 SF Lots
Bellamy Point	5 SF Lots
Country Meadows Subdivision	5 SF Lots
Crane Island Phase 2	33 SF Lots
Crossroads	14 SF Lots
Flora Parke Unit 7B	46 SF Lots
Hampton Lakes Phase 4A	87 SF Lots
Hampton Lakes Phase 4B	86 SF Lots
Musslewhite Estates	10 SF Lots
Nassau Crossing SF	132 SF Lots
Oakleaf	2 SF Lots
Old Mill	7 SF Lots
River Glen	87 SF Lots
Wildlight Phase 1C	122 SF Lots
Woodmere	12 SF Lots
Plats/Residential Projects in Review	
Amelia Concourse Phase 3 Unit A	31 SF Lots
Amelia Concourse Phase 3 Unit B	77 SF Lots
Amelia Concourse Phase 3 Unit C	64 SF Lots
Barnwell Manor Phase II	67 SF Lots
Barnwell Manor Phase III	62 SF Lots
Dixon Farms	11 SF Lots
Enclave 1 at Summer Beach Revision 2	6 SF Lots
Evening Dove Estates	5 SF Lots
Hideaway Phase 1c	50 SF Lots
Laurel Oaks Estates Phase II	30 SF Lots
Lem Turner Acres	5 SF Lots
Marsh View Townhomes	20 TH Units
Mills Creek Preserve Apartments	188 MF Units
Miner Pines	12 SF Lots
Nassau Crossing Townhomes Phase 1	65 TH Units
Nassau Station*	92 SF Lots
Northwood Farms	18 SF Lots
Sandy Pointe Preserve Phase 2	52 SF Lots
Southern Pines Phases 1-3	141 SF Lots
Tributary Phase 1A Unit One	122 SF Lots
Village Walk Phase 3	79 SF Lots
Woodbridge Phase IV-A	51 SF Lots

Residential Growth

GRAPH 13: AVERAGE SINGLE-FAMILY HOME SALES PRICE IN NASSAU COUNTY BY ZIP CODE⁵



GRAPH 14: MEAN SALES PRICE IN NASSAU 1990-2019⁶



GRAPH 15: MEDIAN SALES PRICE IN NASSAU 1990-2019⁶

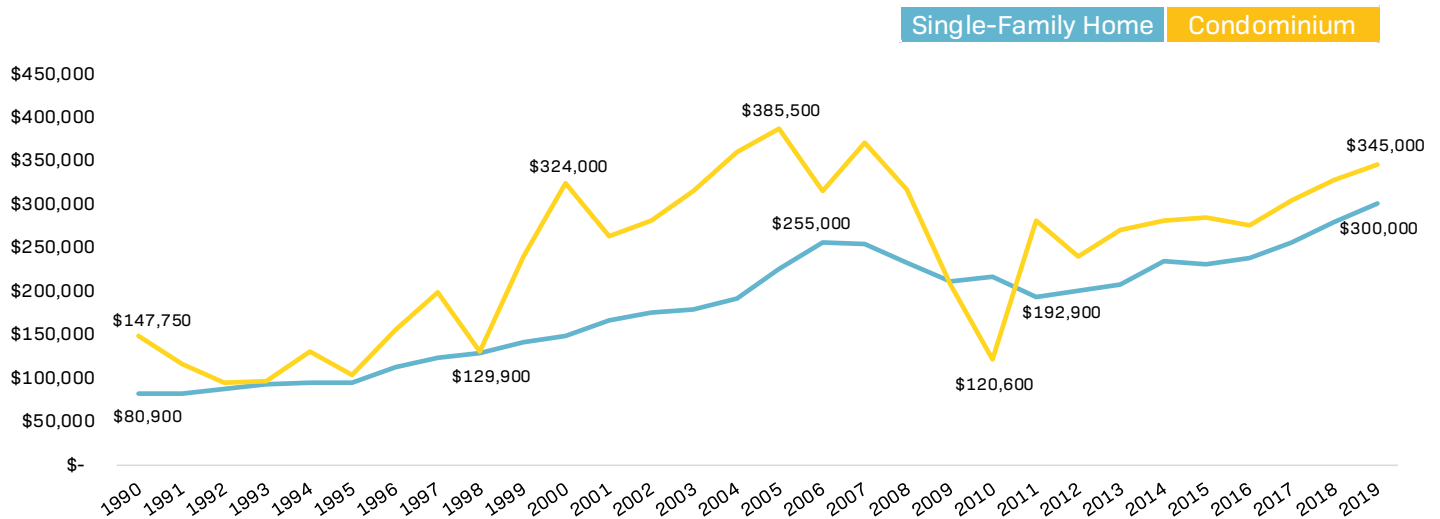
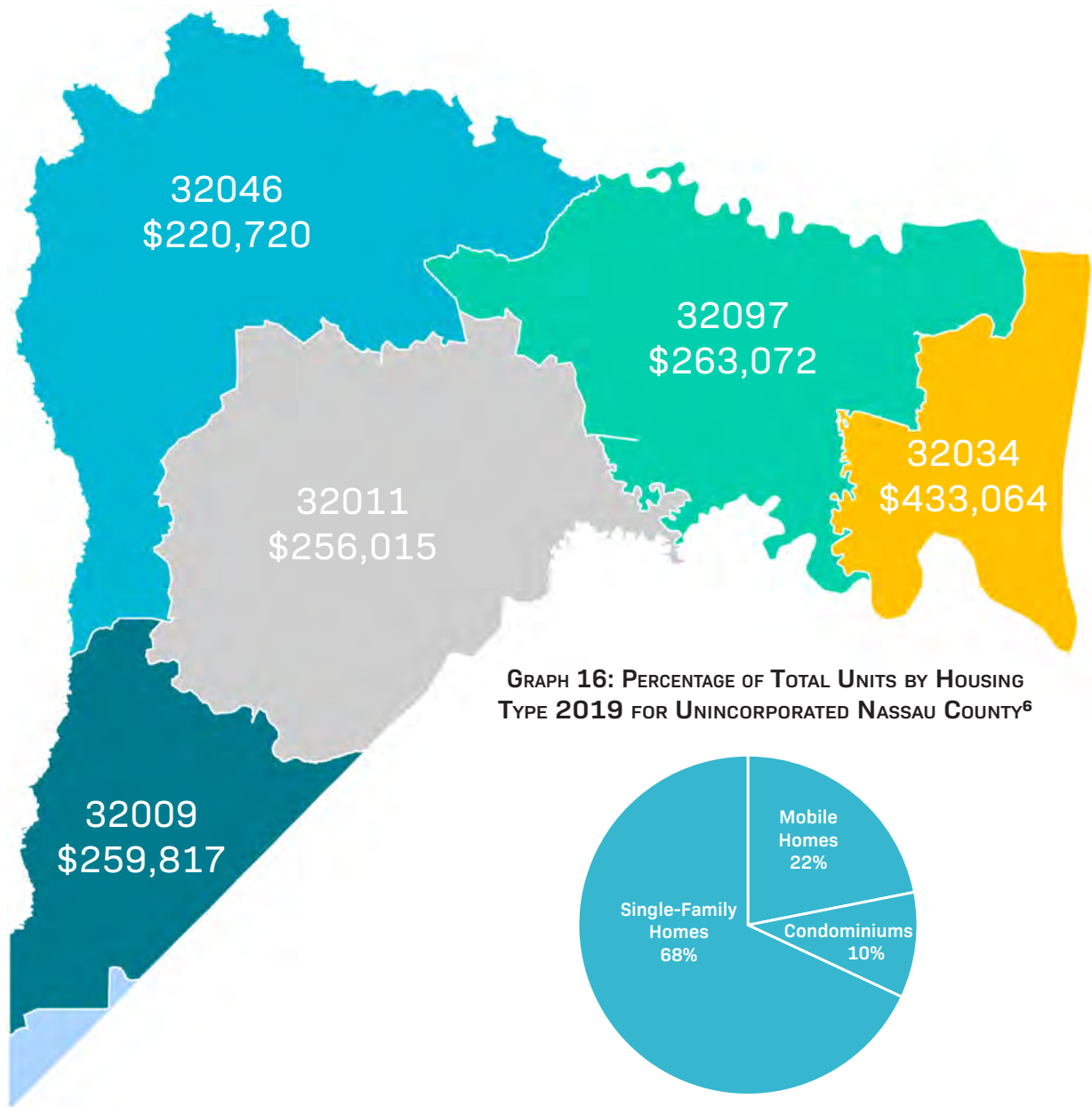
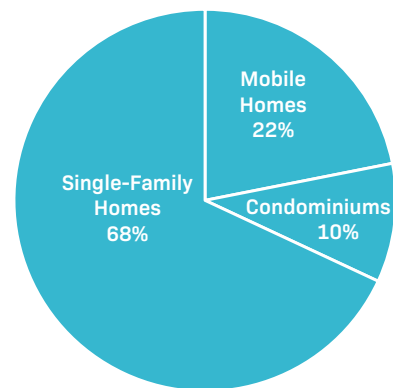


FIGURE 3: ZIPCODE MAP & AVERAGE SINGLE-FAMILY HOME SALES PRICE BY 2019⁵**GRAPH 16: PERCENTAGE OF TOTAL UNITS BY HOUSING TYPE 2019 FOR UNINCORPORATED NASSAU COUNTY⁶****FIGURE 4: TOTAL UNITS BY HOUSING TYPE 2019 FOR UNINCORPORATED NASSAU COUNTY⁶**

CURRENT NON-RES. & MIXED-USE PROJECTS

APPROVED COMMERCIAL PROJECTS* IN 2019-2020:

*COMMERCIAL PROJECT OVER 4,500 SQUARE FEET

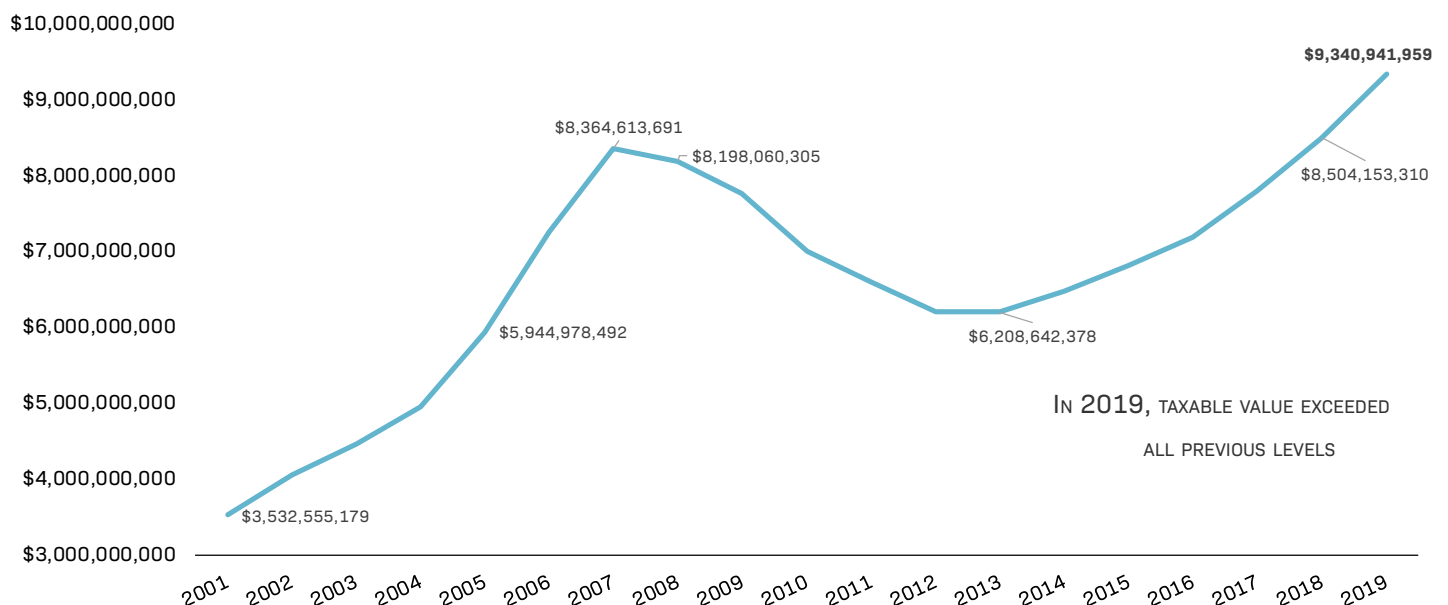
- Amelia Island Brewery (5,278 SF Brewery and 1,575 Taphouse)
- Bryceville CRS (9,100 sqft Retail Convenience Store)
- Circle K - Yulee (5,025 sqft Convenience Store w/ Fueling Stations)
- Fairfield Inns & Suites (96 Room - 4 Story Hotel)
- Franklin Mini-Storage (12,000 sqft Storage Space Expansion)
- Hagan Ace Hardware (19,950 sqft Hardware Store w/ 4,320 sqft Garden Center)
- Heartland Dental - Wildlight (4,617 sqft Professional Building)
- Mavis Tire - Yulee (6,750 sqft Auto Parts Store)
- Nassau Solar Energy (+444 acre Photo-Voltaic Solar Energy Facility)
- Tire Outlet (11,000 sqft Tire Sales/Installation)
- Tractor Supply (18,800 sqft Retail Store)
- Wildlight Commercial Parcel (10,500 sqft Commercial Space)

COMMERCIAL PROJECTS* IN REVIEW:

- A1A & I-95 Mini-Storage/Retail (93,200 sqft Mini-Storage, 7,650 Retail Building)
- Baptist Medical Village (40,000 sqft Medical Office Building)
- Chester Corner Build-Out (14,100sqft Specialty Retail, 3,000sqft Fast Food Restaurant)
- Chester Road Office Park (9,000 sqft Retail/Office Building and 12,000 sqft Warehouse)
- ENCPA - Commerce Park (± 1,200,000 sqft of Industrial/80,000 sqft Commercial Space)
- ENCPA - Wildlight PDP #3 (415,000 sqft Non-Residential Uses and 1,420 Residential Units)
- Fire Station #71 (8,992 sqft Fire Station)
- Flora Parke Commercial (24,825 sqft Commercial, Professional Office Space)
- Nassau Crossing Community Park (59.7 acre Community Park)
- Pet Paradise (14,686 sqft dog kennel, veterinary services, and grooming)
- SR200 & Amelia Concourse (4,650 sqft Convenience Store and Gas Station)
- Tacy Medical, Inc. (25,000sqft Warehouse w/ Office Space)
- Villages of Amelia Outparcel 8 (12,000 sqft Multi-Unit Commercial Retail Building)

TAXABLE VALUES

GRAPH 17: TOTAL TAXABLE VALUE ALL PROPERTIES¹¹



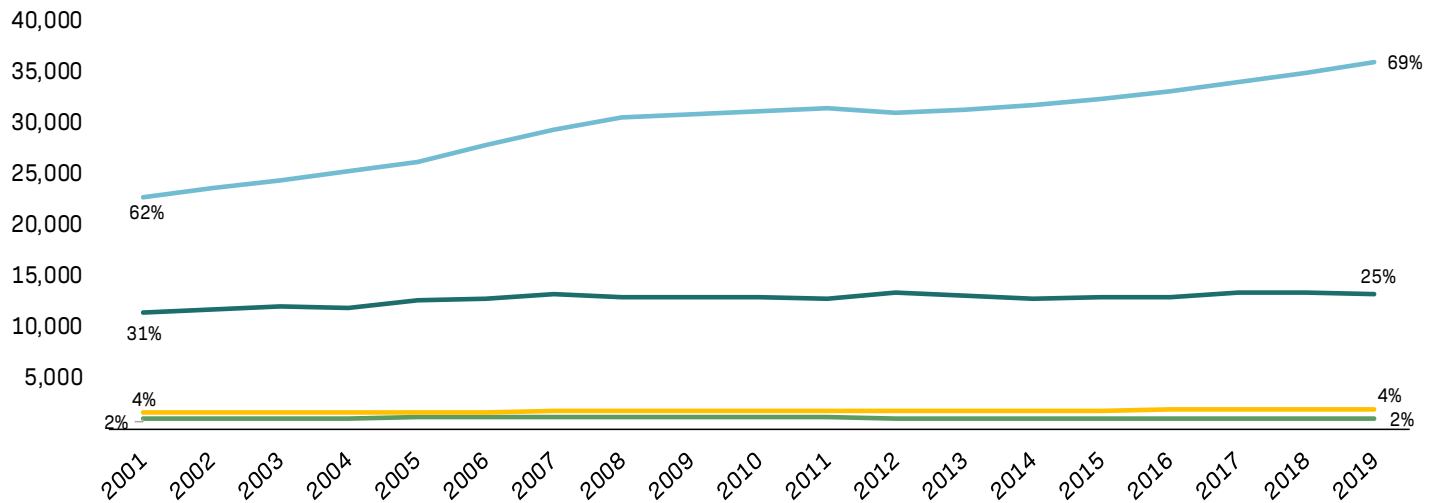
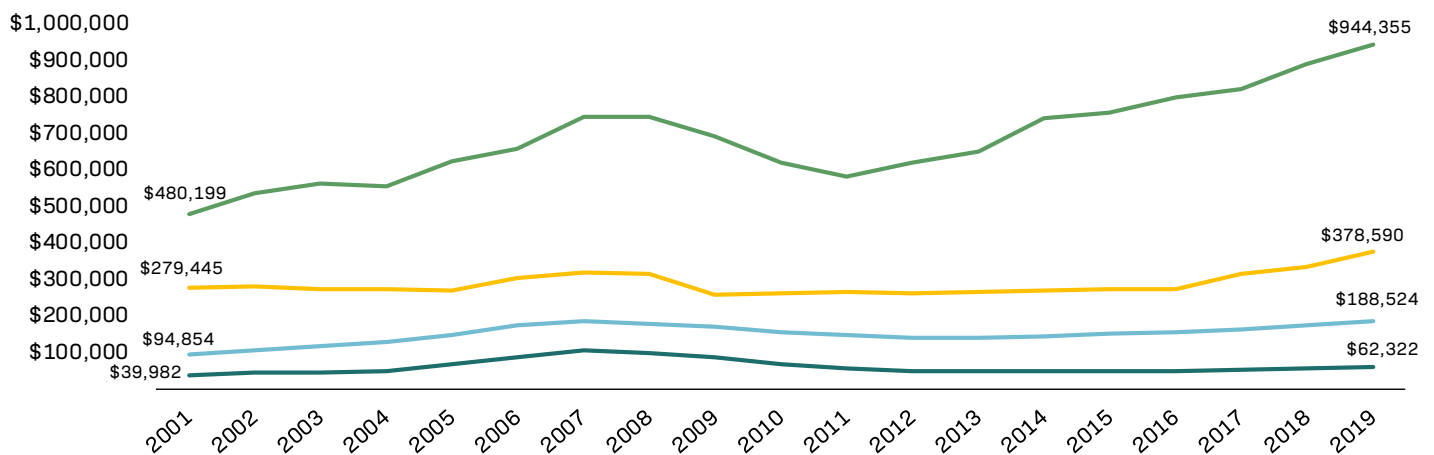
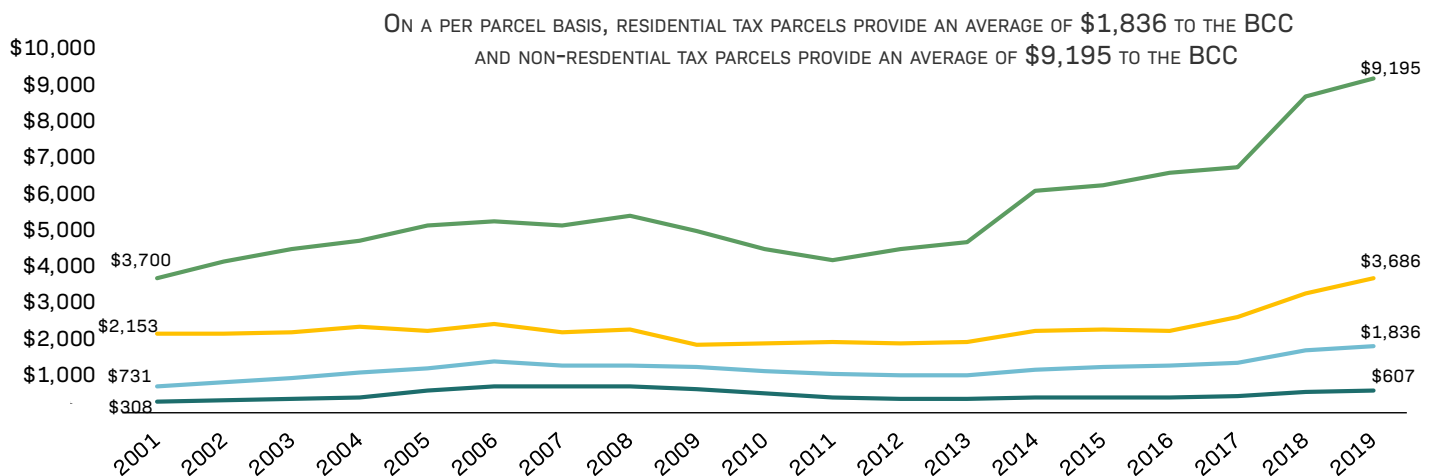
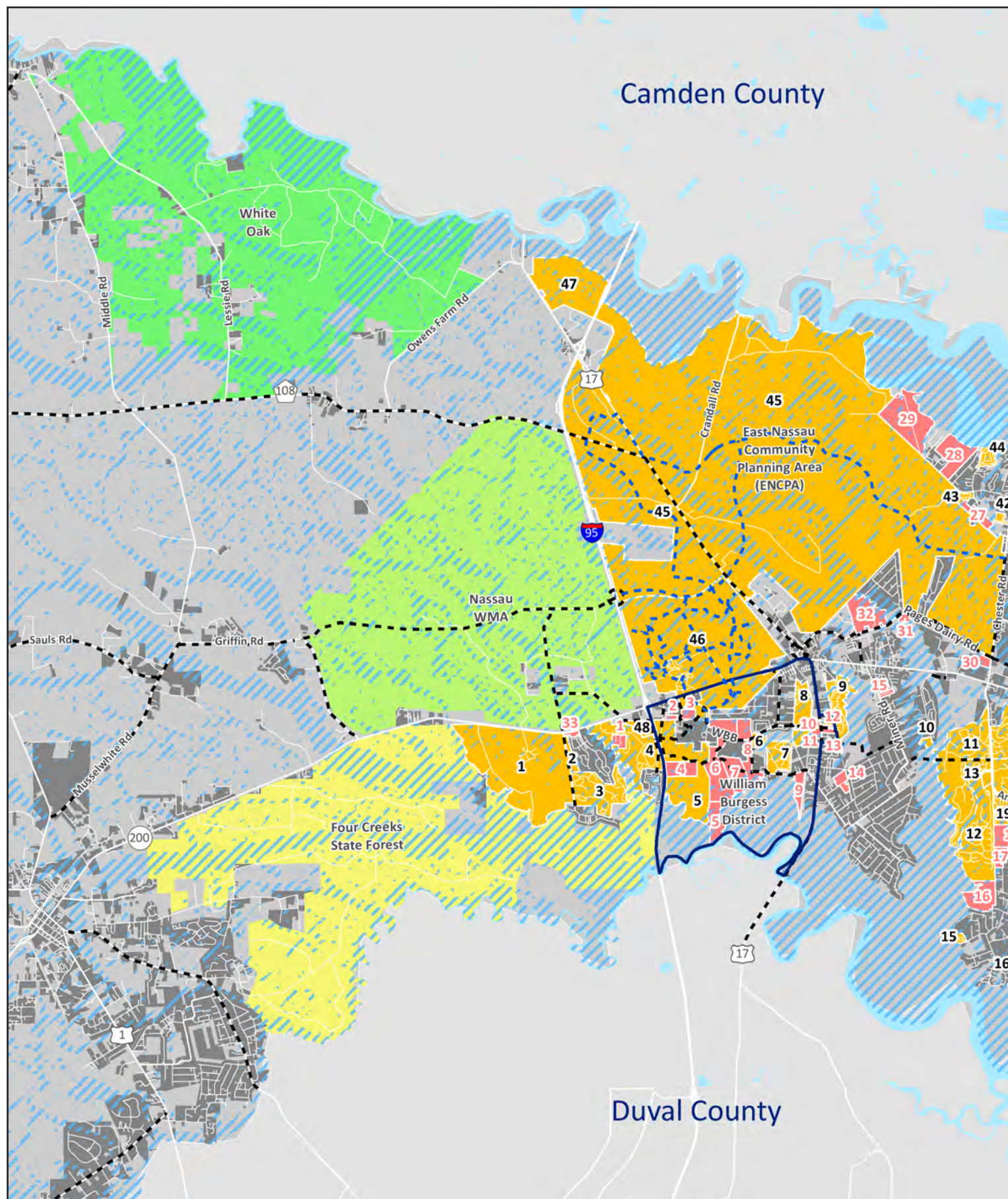
**GRAPH 18: TOTAL NUMBER OF TAX PARCELS 2019¹¹****GRAPH 19: AVERAGE TAXABLE VALUE PER PARCEL 2019¹¹****GRAPH 20: AVERAGE TAXES TO THE BOCC PER PARCEL 2019¹¹**

FIGURE 5: RESIDENTIAL DEVELOPMENT TRACKER 2019⁴



NASSAU COUNTY RESIDENTIAL DEVELOPMENT TRACKER 2019

Tracked Developments* (Entitled)

Key	Development	Entitled	Built	Unbuilt
1	Tributary	3,200	0	3,200
2	Timberland Estates	27	13	14
3	River Glen	688	231	457
4	Plummers Creek	500	292	208
5	Employment Center DSAP Southern Planning Area	0	0	0
6	Nassau Station	136	0	136
7	Lumber Creek	318	243	75
8	Nassau Crossing	800	0	800
9	The Hideaway	483	421	62
10	Lofton Reserve	8	5	3
11	North Hampton	749	703	46
12	Hampton Lakes (Amelia Walk)	749	257	492
13	Hampton Lakes (Village Walk)	210	22	188
14	Flora Parke	732	593	139
15	Southern Creek	17	1	16
16	Holly Point Estates	9	2	7
17	Dockside on Christopher Creek Replat	4	0	4
18	Sheffield Bluff	17	9	8
19	Amelia Concourse	465	276	189
20	Amelia National	749	226	523
21	Harbor Concourse	138	108	30
22	Concourse Crossing	247	0	247
23	Amelia Bay Estates	39	10	29
24	Murrays Triangle	17	4	13
25	Creekstone	46	29	17
26	Sandy Pointe Preserve	121	15	106
27	Woodbrier	106	99	7
28	Parliament Estates	4	2	2
29	Villages of Woodbridge	554	186	368
30	Brady Point Reserve	76	25	51
31	Marsh View Townhomes	20	0	20
32	Barnwell Manor	207	56	151
33	Grande Oaks @ Amelia Replat	80	66	14
34	Oyster Bay	399	285	114
35	Marshes @ Lanceford	62	59	3
36	Lanceford	40	25	15
37	Blackheath Park	22	3	19
38	Captains Pointe	20	12	8
39	Blackrock Park	82	23	59
40	Blackrock Hammock	46	36	12
41	Jordans Cove	8	3	5
42	Northbrook	37	32	5
43	Creekside	68	58	10
44	Watermans Bluff (Lighthouse Pointe)	144	53	91
45	ENCPA (Sector plan less approved DSAPs)	19,962	0	19,962
46	Employment Center DSAP Central Planning Area	3,269	49	3,220
47	Employment Center DSAP Northern Planning Area	769	0	769
48	Mills Creek Preserve	300	0	300
TOTAL		36,746	4,532	32,214

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 through November 30, 2018.

****Estimates based on best available information. Potential square footage is based on 80% of the maximum intensity of commercial use as established in the 2030 Comprehensive Plan.

For study purposes only to identify potential intensity.

*****If FLUM is amended to HDR.



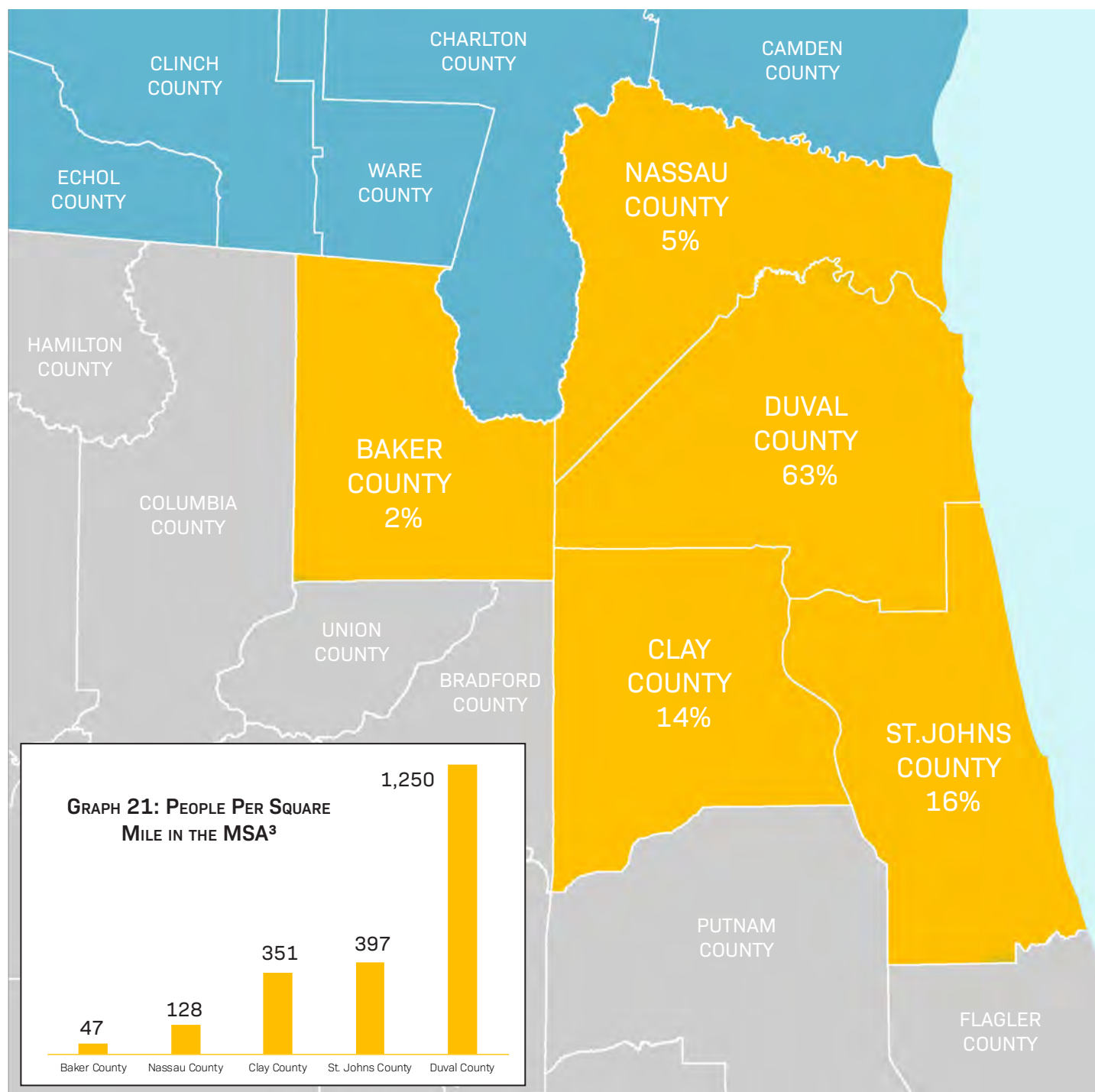
Potential Development Parcels**

Key	FLUM	Acreage	Approximate Wetlands	Approximate Units
1	LDR	35	8	54
2	AGR	12	2	10
3	AGR	29	17	12
4	AGR	94	13	81
5	AGR	105	41	64
6	HDR/MDR	328	52	855
7	AGR	116	23	93
8	AGR	127	33	137
9	MDR	58	0	174
10	IND*****	9	1	80
11	IND*****	22	9	180
12	MDR	6	0	18
13	MDR	13	0	39
14	MDR	41	0	123
15	AGR	15	0	12
16	LDR	152	33	238
17	LDR	46	19	54
18	LDR	155	22	266
19	LDR	108	9	198
20	LDR	123	61	124
21	LDR	10	0	20
22	LDR	210	88	244
23	LDR	35	8	26
24	MDR	213	56	399
25	LDR	41	1	80
26	MDR	16	10	18
27	LDR	61	3	116
28	LDR	191	5	372
29	AGR	371	66	305
30	IND*****	28	14	210
31	MDR	17	3	42
32	LDR	203	90	230
33	LDR	13	0	26
TOTAL				4,900

REGIONAL CONTEXT | POPULATION TRENDS

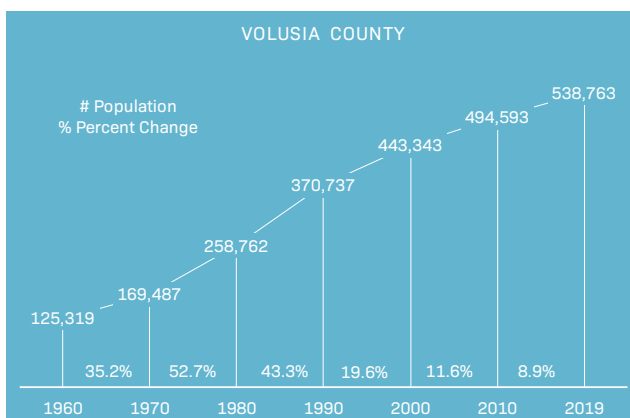
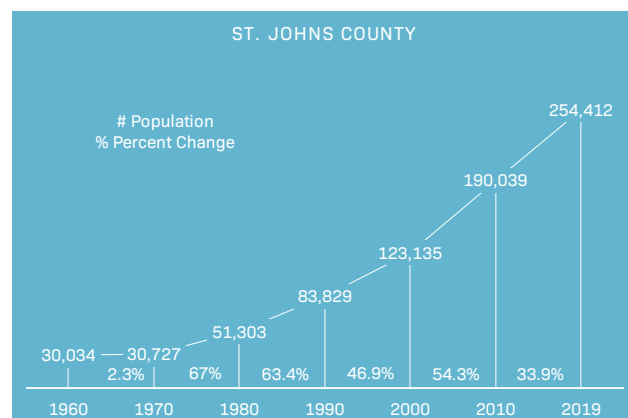
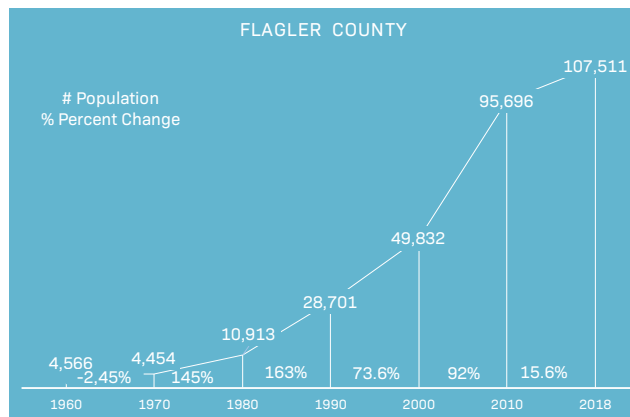
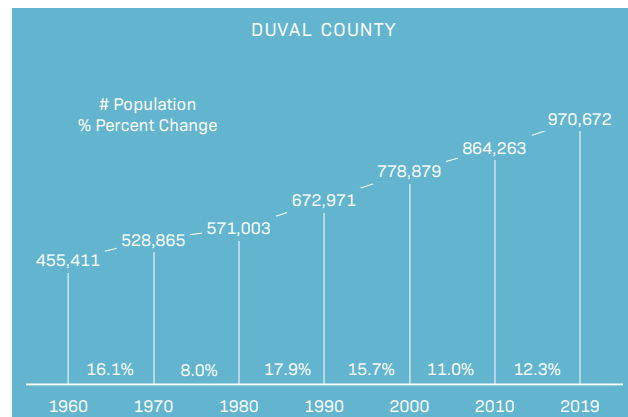
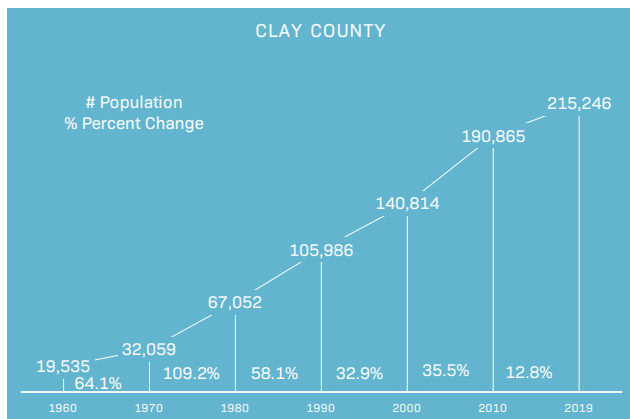
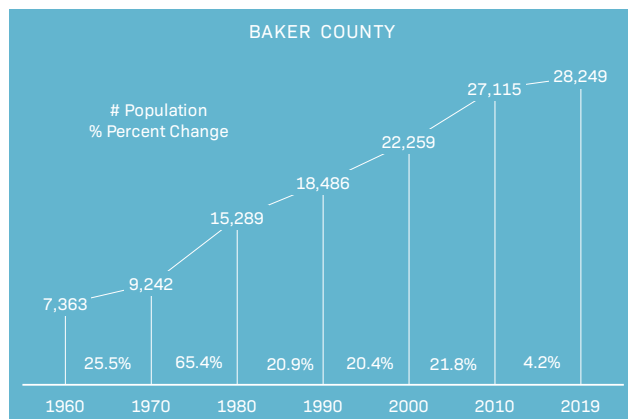
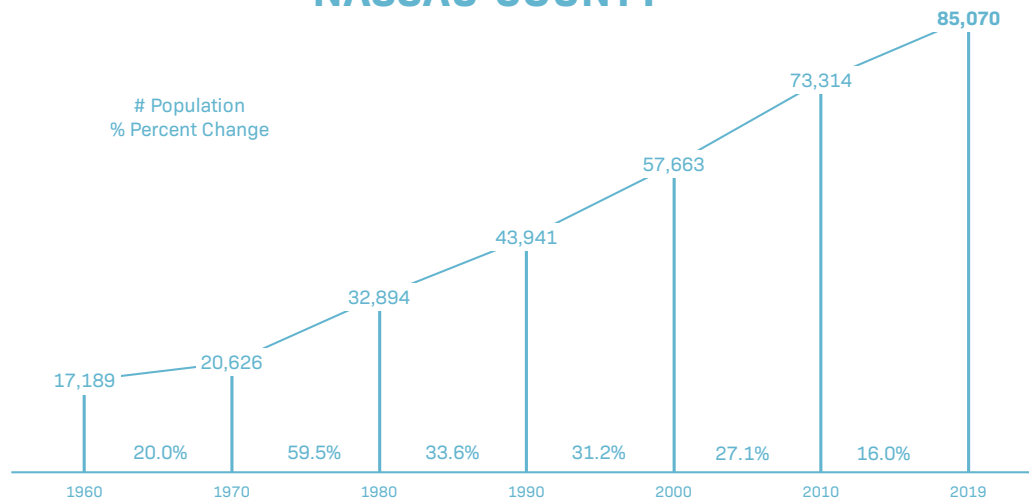
The Jacksonville MSA consists of Nassau County, Duval County, Baker County, Clay County, and St. John's County. Regional statistics provide a comprehensive view of the existing conditions and projected growth in the region. In 2019, Nassau County encompassed 5% of the Jacksonville MSA population. When considering the percent growth since 2010, Nassau County currently ranks 2nd compared to other counties within the MSA and northeast Florida region. In 2019, Nassau was the 5th fastest growing county in the state of Florida and the 40th fastest growing county in the country (by % growth)¹⁵. This growth rate places Nassau in the top 1.5% of the fastest growing counties in the country for 2019.

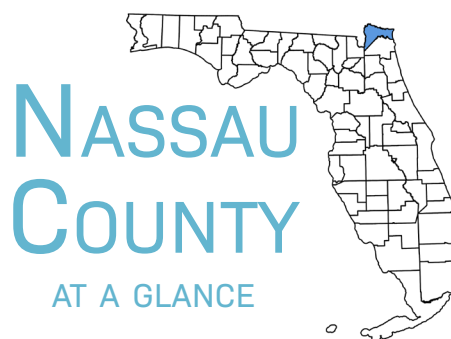
FIGURE 6: REGIONAL MAP AND MSA POPULATION DISTRIBUTION 2019³



GRAPH 22: HISTORICAL TRENDS FOR SURROUNDING REGION³

NASSAU COUNTY





Outstanding Public School System ¹⁴

4th overall best School District in State according to the
Florida Department of Education
11 individual 'A' rated Schools in the District



Low Crime Rate (index crimes per 100,000 population)¹²

Florida 2,551	Nassau County 1,493	Clay 1,770
Baker 1,402	St Johns 1,180	Duval 3,385



Increased National Recognition of Amelia Island/Fernandina Beach

12 Charming Small Towns in the South - TripAdvisor 19'
14 Scenic Island Vacations in the US Oozing with Charm - TripAdvisor '19
Best Islands in America - CNN '19
Top 10 Most Romantic Places in FL - Coastal Living 18'
#8 Top 10 Islands in US - Travel & Leisure 19'
10 Exceptionally Charming Downtowns in the US - TripAdvisor '19
17 Beautiful Small Towns to Visit in the U.S. - TripAdvisor 19'



Job Centers Shifting North

Westside Industrial Park	Cecil Commerce Center	ENCPA/Wildlight
Westlake Industrial Park	Downtown Jacksonville	Crawford Diamond
William Burgess District	Jacksonville International Airport	

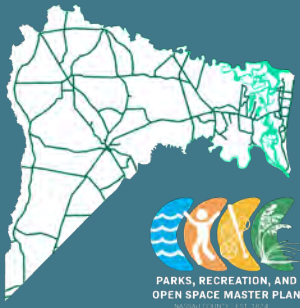


Regional Transportation Initiatives

Establishing a Regional Transit Authority/System
New I-95 interchange between SR200 and US-17
North Florida TPO's Long Range Transportation Plan/Mobility Network

PLANNING INITIATIVES

RECREATION MASTER PLAN



www.nassaucountyfl.com/587/Recreation-Planning

The Recreation Master Plan will analyze level of service standards and inventory the County's current parks system. It will recommend guidelines for the size, timing and phasing of parks in the County by using population trends and projections. It will also consider what types of parks and recreation facilities are most appropriate in individual communities based on public input.

The Recreation Master Plan will be used to create a long-range financially feasible plan for the identification and acquisition of land for recreational purposes. The plan will include criteria for, and priority ranking of, lands for acquisition and development. It will consider existing and potential funding sources as well as programs for implementation and capital improvements for future parks and recreation facilities.

Nassau County has engaged Barth and Associates to assist in long-term recreation planning for the County.

TIMBER TO TIDES TRAIL



<http://www.nassaucountyfl.com/951/A1ASR200-Corridor-Design-Plan>

The Nassau County Board of County Commissioners engaged GAI Consultants to work with the County in completing a corridor design plan for the SR200/A1A/Buccaneer Trail Corridor from Police Lodge Road west of I-95 and continuing east to the Intracoastal Waterway, approximately 13.18 miles.

Envisioned as the Timber to Tides Trail, the goals of the study is to transform SR200/A1A into a place that functions not just as a major roadway, but a place that provides different opportunities for living and working, and creates a sense of place in Nassau County based on our community's history, character, and quality of life. The study will emphasize community identity, enhance the public realm and streetscape, encourage recreation and bicycle and pedestrian activity, promote compact mixed-use development patterns, and improve environmental quality and floodplain management, while also attracting private investment and making use of already developed sites.

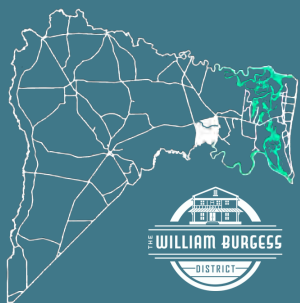
WESTERN NASSAU



www.nassaucountyfl.com/840/Western-Nassau-Heritage-Preservation-Com

In response to a Fall 2017 Urban Land Institute report on the impacts of growth on Western Nassau, the Western Nassau Heritage Preservation Committee (WNHPC) was formed. The committee was charged with discussing the future of Western Nassau, and to work with the community and staff planners to determine how best to address impending growth pressures. In 2018 and 2019, the Committee and County planning staff facilitated an extensive public outreach campaign in Western Nassau to gather input from residents, property owners, non-profits, other government agencies, and private sector entities to craft a vision for the future of Western Nassau. On December 16, 2019, after a year and a half of community outreach and engagement, a unified Vision Plan was completed and adopted by the County Commission without objection or modification. The Vision Book provides guidelines for policy makers as they set priorities and make decisions about the future of Western Nassau. One of the many directives is to execute the Crawford Area Plan, an overlay district using a hybrid-form based code based around the Crawford Diamond Industrial Park, an 1,800 acre McCallum Sweeny designated "mega industrial park" with dual Class I rail frontage.

WILLIAM BURGESS DISTRICT

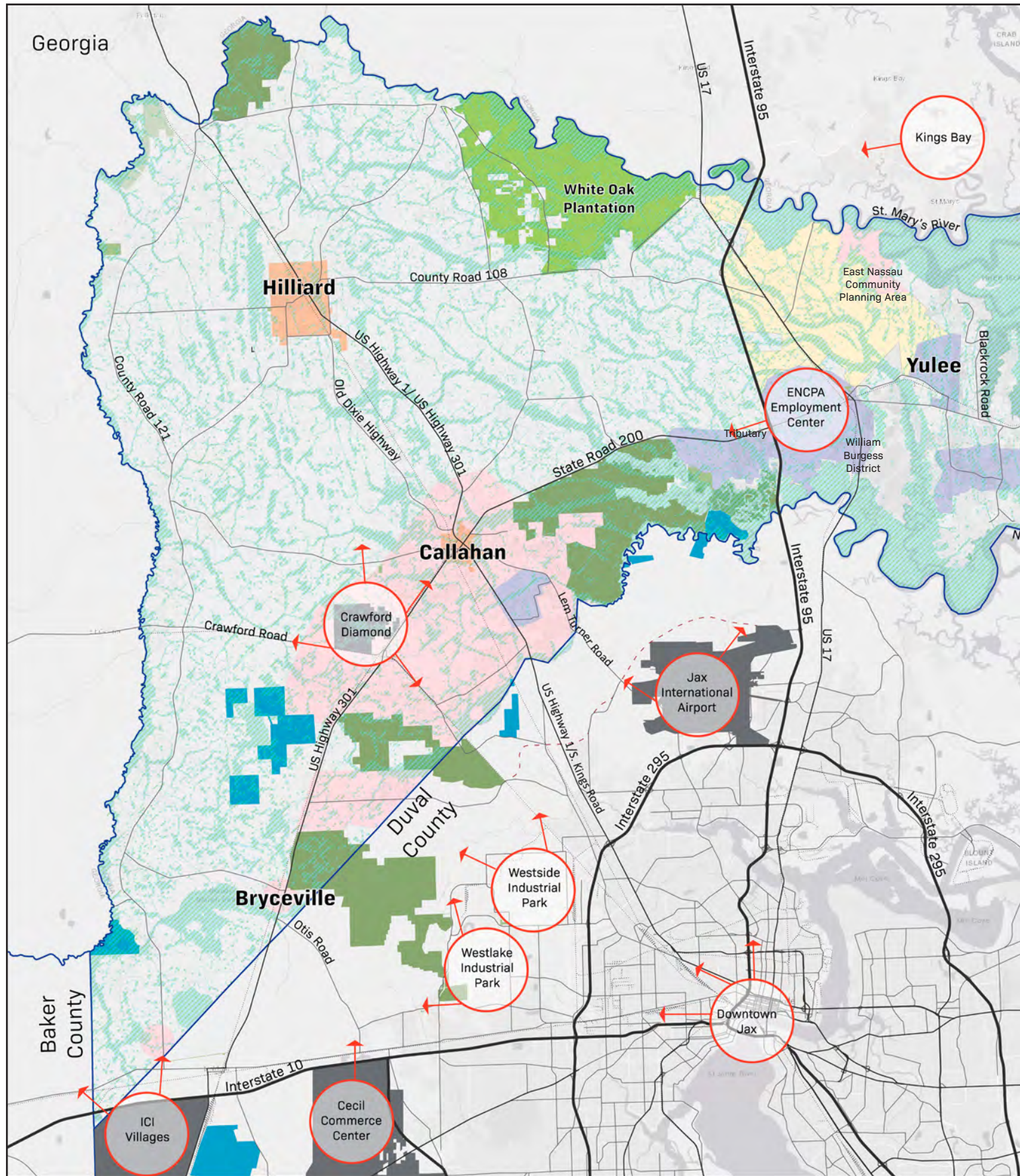


<http://www.nassaucountyfl.com/860/William-Burgess-Overlay-District>

The William Burgess Overlay District (WBD) and associated Vision Book represent a philosophical shift in land use planning in Nassau County away from the auto-dependent development pattern that has dominated growth and towards a sustainable, compact, mixed-use and multi-modal development pattern. The intent of the WBD is to utilize the built environment to promote strong social ties and the cultivation of community, highlight Nassau's railroad history to facilitate an authentic sense of place experience, and take advantage of multi-modal transportation opportunities in a growing part of Yulee.

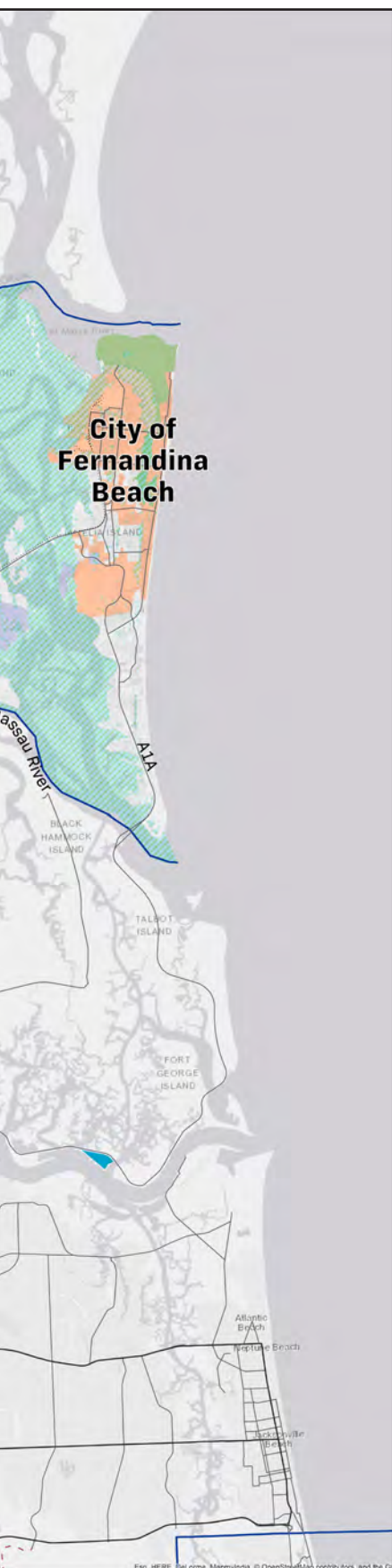
The William Burgess Overlay District includes all the lands east of I-95, west of US-17, south of SR-200 and north of the Nassau River. The Board of County Commissioners approved the William Burgess District Context and Connectivity Blueprint on July 8, 2019 via Ordinances 2019-19 and 2019-20.

FIGURE 7: REGIONAL EMPLOYMENT CENTERS/DRIVERS AND PROJECTED GROWTH AREAS



NASSAU COUNTY EMPLOYMENT CENTERS DRIVERS & GROWTH

Regional drivers have the potential to push residential development into southern and western Nassau County. This exhibit is based on the best available data to conceptually identify future growth areas.



-  East Nassau Community Planning Area
-  White Oak Plantation Overlay
-  Municipal Boundaries
-  State Forests
-  National Wetland Inventory
-  Mitigation Bank
-  Parks
-  Highways
-  Roads
-  Railroads
-  Employment Center Areas
-  Major Employment Centers
-  Residential Stressor Direction
-  County Boundary
-  Predicted Areas of Growth: Zero (0) to Five (5) Years
-  Predicted Areas of Growth: Five (5) to Fifteen (15) Years
-  Conservation Easements/Protected Lands

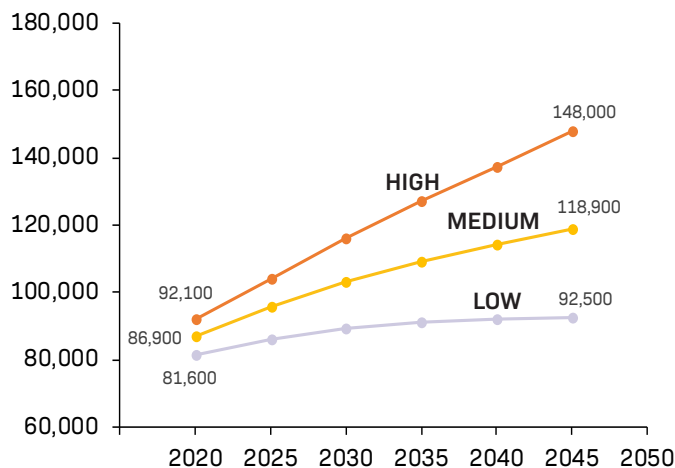
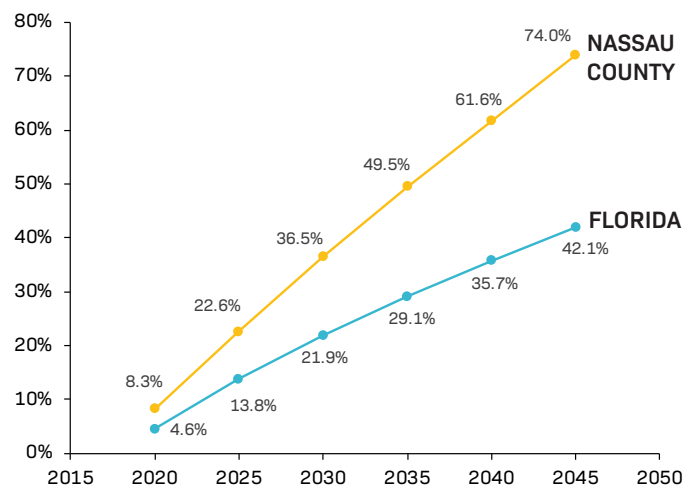
PREDICTIONS & TRENDS

NET NEW JOBS NEEDED BY:

2030 - 5,667⁷

	LOW	MEDIUM	HIGH
2020	81,600	86,900	92,100
2025	86,200	95,800	104,300
2030	89,400	103,100	116,100
2035	91,200	109,100	127,200
2040	92,100	114,300	137,500
2045	92,500	118,900	148,000

Estimates are provided by the Bureau of Economic and Business Research. These projections are based on 2019 population estimates (85,070 baseline).⁸

GRAPH 23: NASSAU COUNTY POPULATION PROJECTIONS⁸GRAPH 24: HIGH-RANGE SCENARIO POPULATION PROJECTIONS⁸

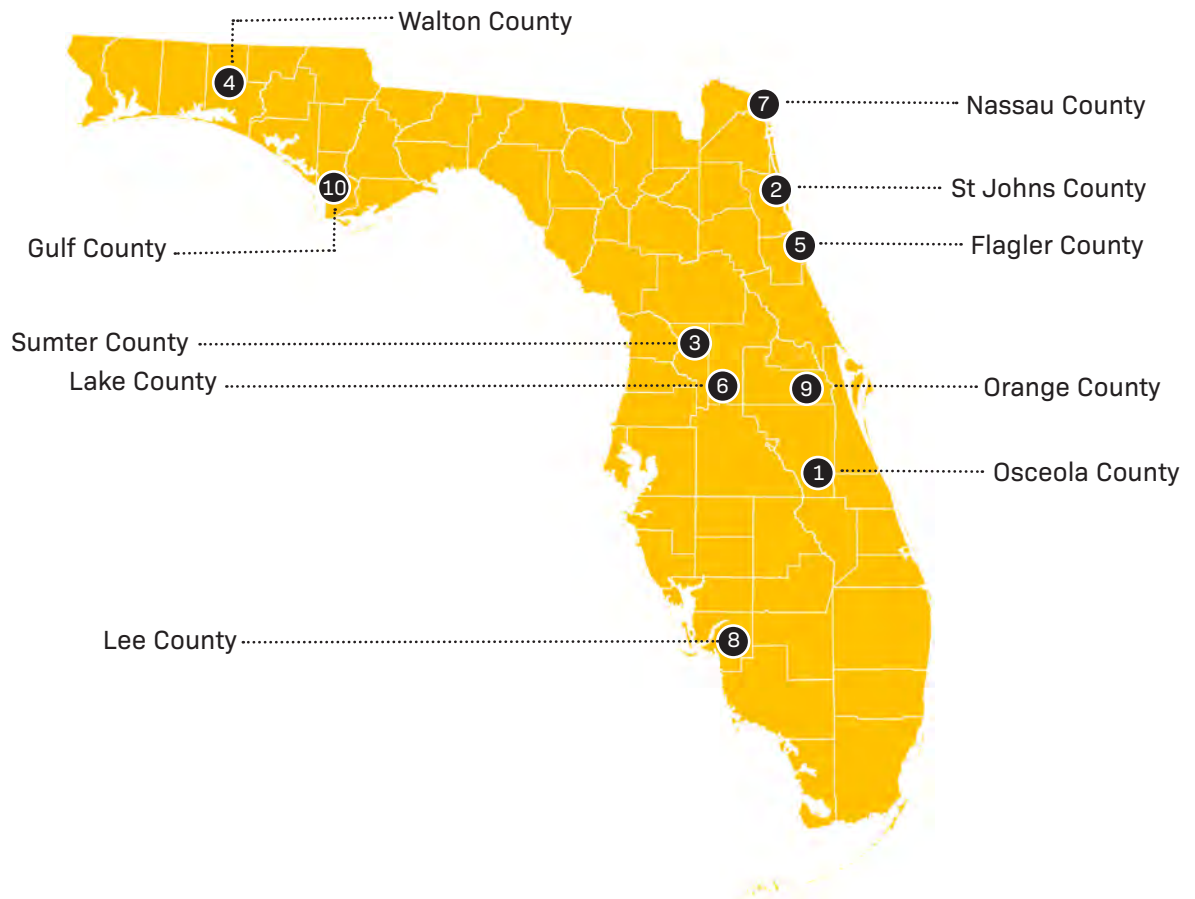
The University of Florida's Bureau of Economic and Business Research (BEBR) produces Florida's official state and local population estimates and projections. According to BEBR the 2019 population estimate for Nassau County is 85,070. Based on U.S. Census Bureau population estimates, the 2019 population estimate for Nassau County is 88,625. According to this data, Nassau County experienced an increase in population from 2018 to 2019 of 2.81% and 3.25%, respectively.

If we apply the year over year percentage increase to both BEBR's and the U.S. Census Bureau's population estimates, Nassau County is projected to reach a population of 100,000 persons as early as 2025 and 2023 respectively. The above projections do not specifically take into account "game changers" of regional significance within the local environment, i.e. 3,000 -6,000 jobs coming on-line at the Crawford Diamond or Wildlight Commerce Center in a five year time-frame. Nor does the above consider an economic downturn.

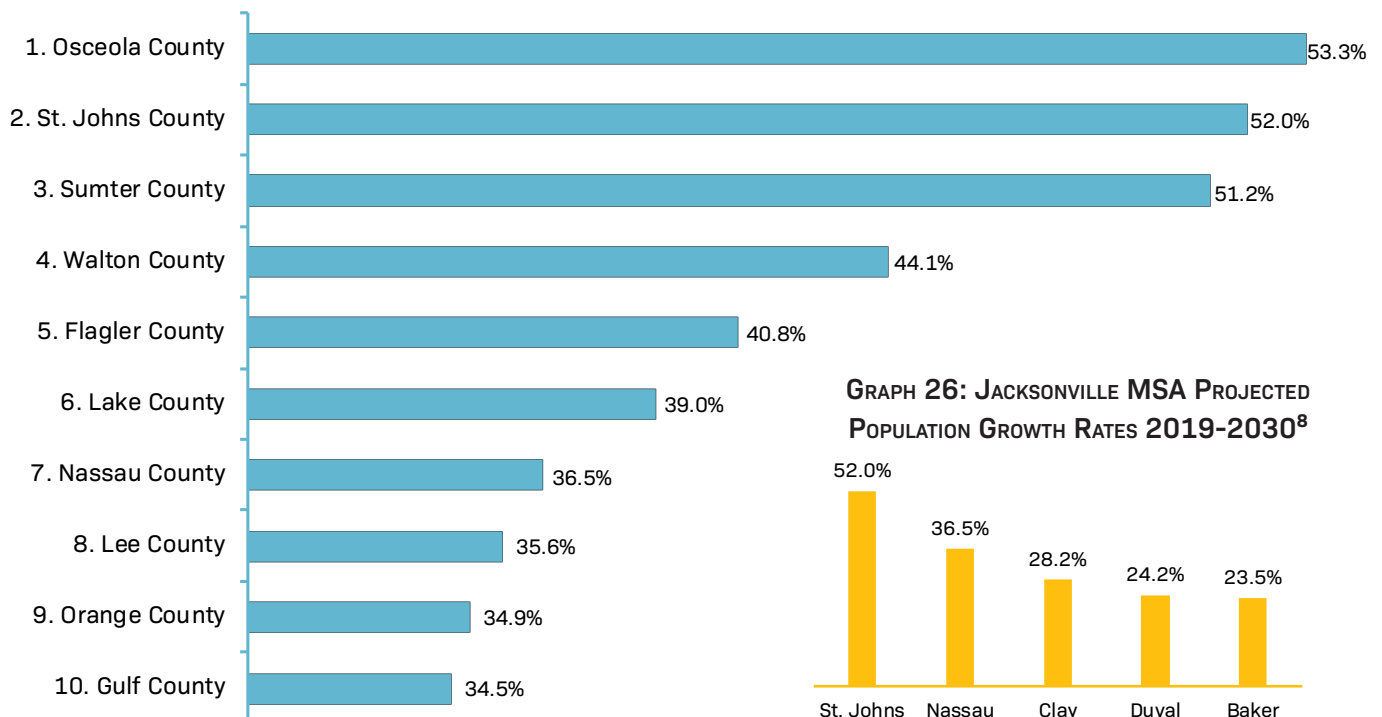
Population Projections Nassau County							
Projection Source	2019	2020	2021	2022	2023	2024	2025
BEBR Baseline Est. (2.81% Increase) ³	85,070	87,460	89,918	92,445	95,043	97,713	100,459
Census Baseline Est. (3.25% Increase) ¹	88,625	91,505	94,479	97,550	100,720	103,994	107,373

2030 FASTEST GROWING COUNTIES, BY PERCENT GROWTH⁸

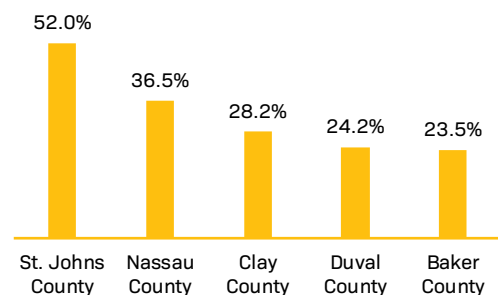
FIGURE 8: 2030 FASTEST GROWING COUNTY⁸



GRAPH 25: FLORIDA'S TOP PROJECTED POPULATION GROWTH RATES 2019-2030⁸



GRAPH 26: JACKSONVILLE MSA PROJECTED POPULATION GROWTH RATES 2019-2030⁸



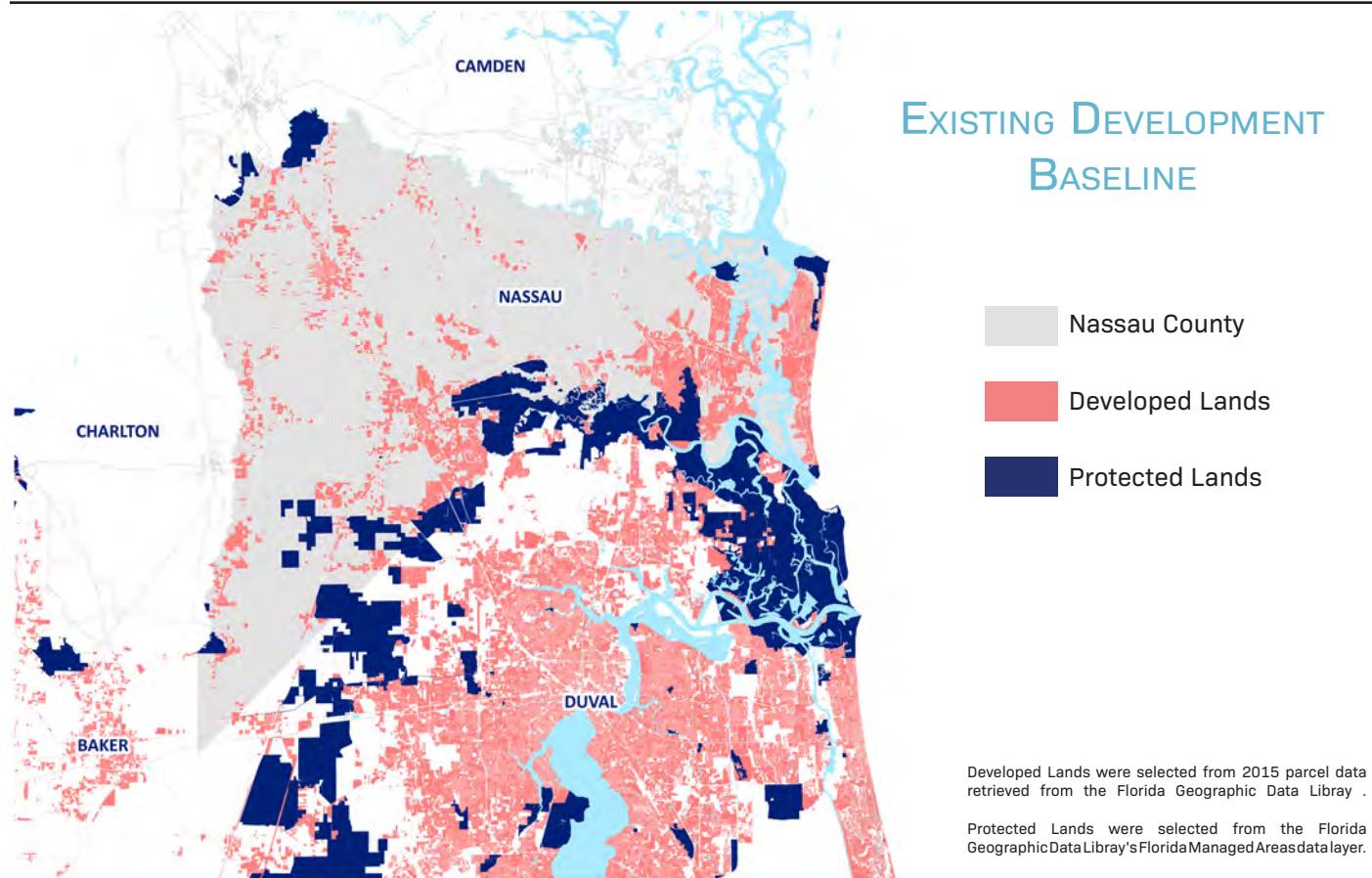


FIGURE 9: EXISTING DEVELOPMENT BASELINE¹³

According to the 2070 Report-Florida 2070, the Northeast Florida region stands to lose an alarming amount of natural areas and agricultural lands by 2070. The correlating population expansion will result in roughly a third more of Northeast Florida lands to be developed by 2070. This is due mostly to current sprawling development patterns coupled with almost two-fold increase in population predicted in the region.

When the analysis conducted at the State level is combined with the more granular analysis conducted by the Nassau County Planning Department, it becomes evident there are certain probabilities that Nassau County must consider in order to prudently prepare for the future:

1. The State of Florida's population is going to expand.
2. Northeast Florida region will receive a disproportionate share, by percent growth, of the population expansion and related urbanization.
3. Within the Northeast Florida region, the 2070 Report predicts the areas along the east coast will receive a large percent of the growth.
4. Juxtaposed to the City of Jacksonville and coupled with the lack of developable lands along Florida's east coast, it is reasonable to assume Nassau County will take a significant share of the population expansion and related urbanization in the Northeast Florida region.
5. Nassau County's population is going to expand whether the County desires the expansion or not. As the population expands so will the level of urbanization (stores, roads, schools, etc) needed to support the expanding population base.
6. A seventy-nine (79) percent population expansion over the next 25 years is, more likely than not, a conservative estimate.
7. It is 100% the responsibility of Nassau County citizens and leaders to take proactive measures to prepare for growth. No state, federal, or regional entity/group has the ability to take the necessary measures.

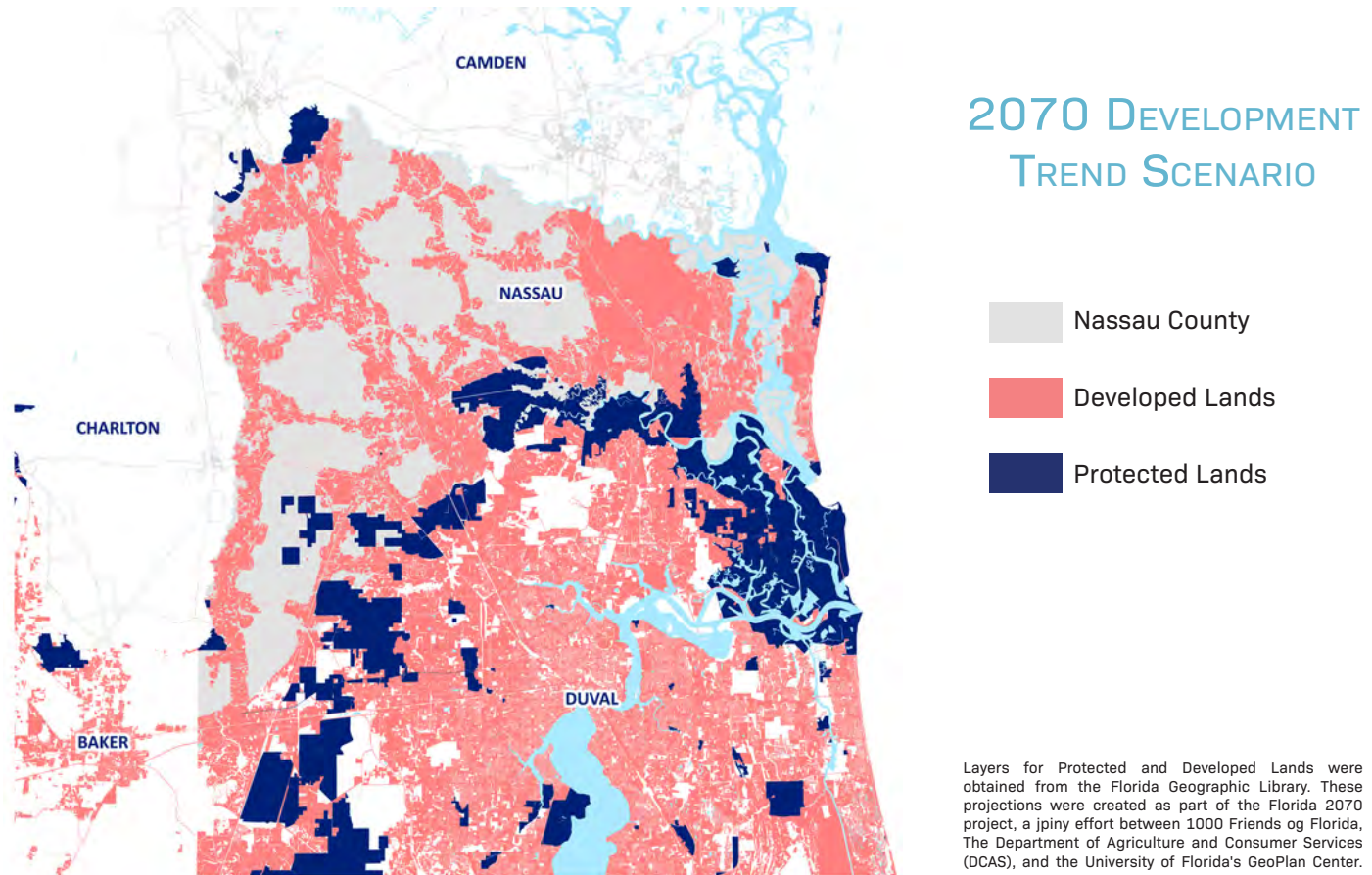
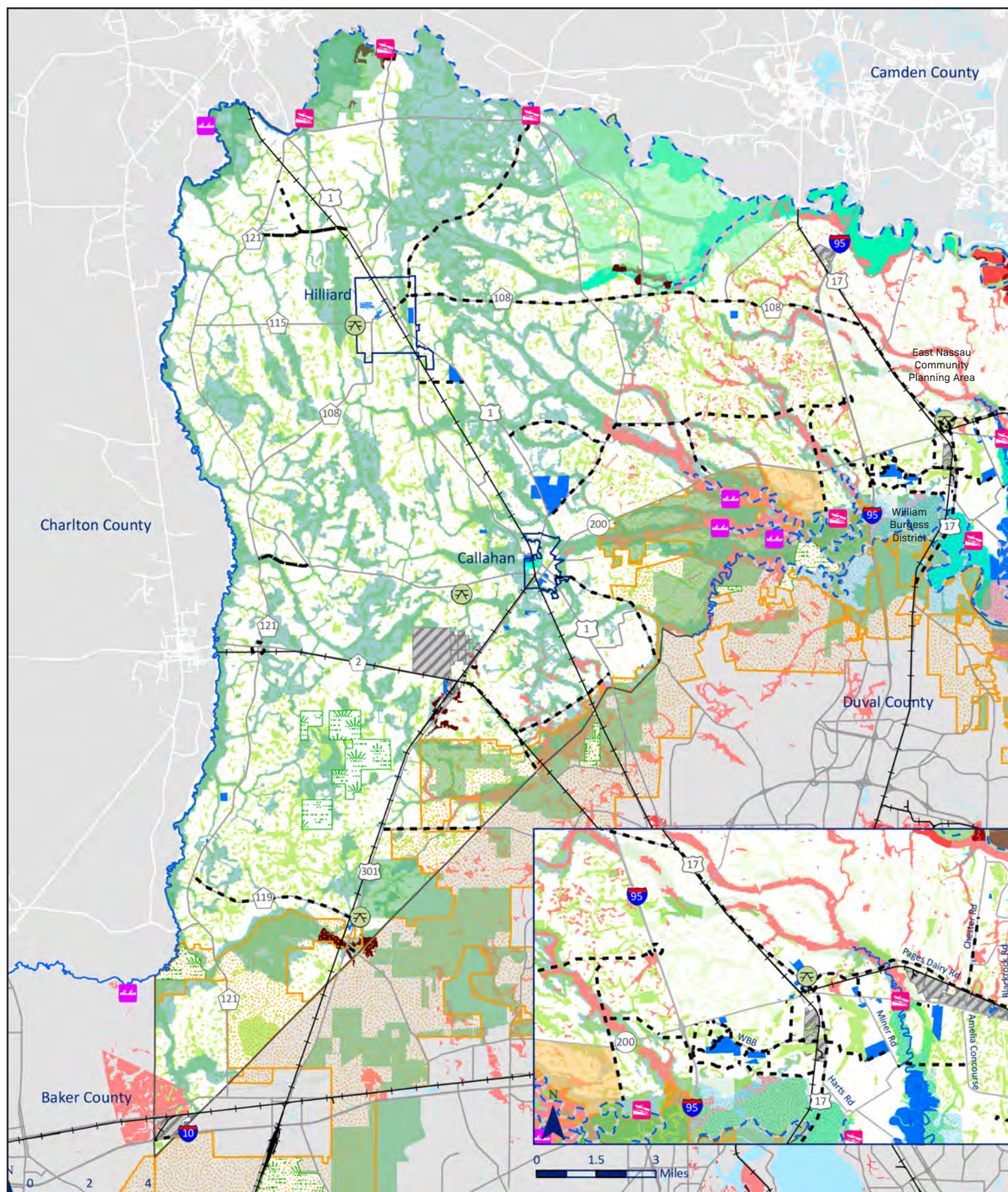


FIGURE 10: 2070 DEVELOPMENT TREND SCENARIO¹³

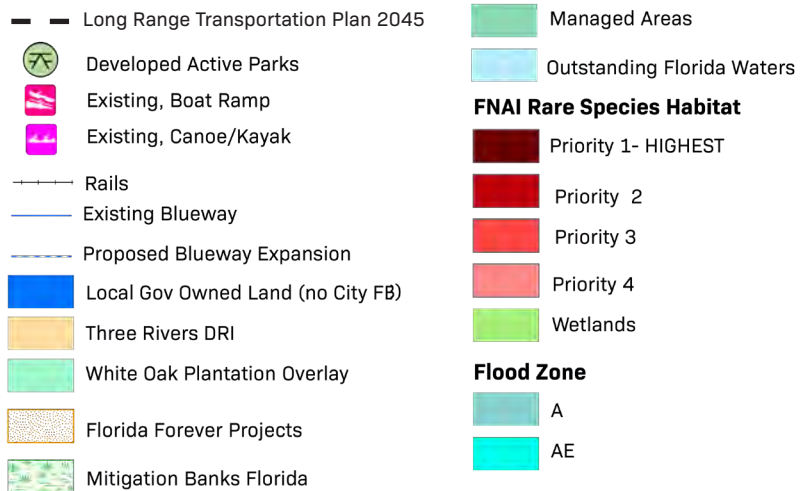
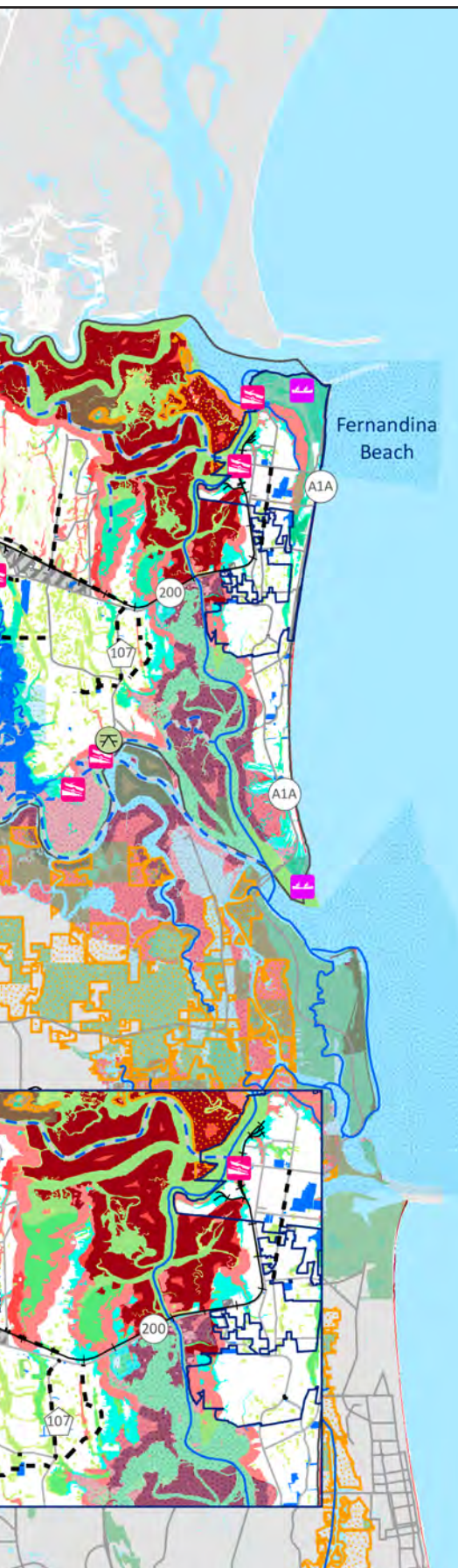
Consistent with key findings of the 2070 Project-Florida 2070 and Nassau County's analysis, the following should be acknowledged:

1. Land is a finite resource. The single most important finding is that even modest increases in development densities can result in substantial savings of land when paired with comprehensive measures that identify lands to remain in agricultural production or to be safeguarded from impacts of development, via preservation and or conservation, to ensure natural ecosystem services, on which humans depend, are protected. [In Nassau, densities of fewer than five dwelling units to the gross acre is considered low density development. Densities should not be increased in areas outside predetermined and designated locations such as the ENCPA and William Burgess District.]
2. If gross densities are increased, there is sufficient land to accommodate growth while also providing protection for agricultural lands, natural areas and civic facilities.
3. Even with requiring higher gross development densities, it is possible to have a wide variety of housing types including single family detached residential products through the use of compact community and traditional design techniques.
4. There are clear fiscal advantages to more compact development patterns. These include lower costs for utilities, roads, drinking water, stormwater management and sewage treatment. Compact development patterns also permit greater diversity of land-uses and transportation options and can save individuals time and money otherwise spent commuting or waiting in traffic.
5. Nassau County is empowered with setting public policy and making land use change decisions and must consider the long-term impacts of decision making. While the cumulative effect of small land use changes may seem minor in the short term, over time, these incremental changes will shape the future landscape of Nassau County.
6. Land conservation, through fee-simple acquisition, conservation easements and regulatory control, is essential to protecting natural ecological functions such as storm-water management and floodplain functionality, and preservation of working agricultural lands as Nassau County's population grows.

FIGURE 11: CONSTRAINTS & OPPORTUNITIES



NASSAU COUNTY CONSTRAINTS & OPPORTUNITIES



One of the most prominent features in the County's landscape is our vast wetland system and our relationship to many water bodies. In 2018, the County was awarded a grant from the Florida Department of Environmental Protection (DEP) to better understand our vulnerabilities as a County relative to changes in their systems.

To learn more, visit:

www.nassaucountyfl.com/vulnerabilityassessment

TOOLBOX & VISION

IMPLEMENTATION STUDY 2032

This report provides a variety of tools that can assist in the evolutionary process of Nassau County as it moves into an exciting future - a future we have the power to shape. The provided 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. As initiatives are executed the toolbox will grow and reconfigure as new challenges arise. Ultimately, these tools are intended to address the root cause of many of the challenges facing Nassau County. While these processes, initiatives and actions will be difficult we must collectively embrace the opportunity, appreciate the challenge, be open to innovation, and strive to maintain proper perspective.

NASSAU COUNTY VISION 2032 PLAN

Quality of Life Goals:

- * Conserve and/or preserve existing natural areas, including wetlands, floodplains, river corridors (such as the St. Marys River), streams, creeks and wildlife habitat.
- * Preserve existing and expand outdoor recreation areas, publicly-owned natural and open space areas, recreational facilities and services throughout Nassau County.
- * Engage the community as a whole to identify places in each community that are historically, socially and ecologically significant and recommend a plan that will reflect the desires, needs, and character of these existing “communities.”

Infrastructure and Growth Management Goals:

- * Achieve a network of safe and efficient multi-modal transportation that is capable of meeting the transportation needs of residents and visitors at an acceptable level of service in a safe and efficient manner.
- * Expand the economic base and create a fiscal sustainable community by attracting high technology and high value industry, office, research, and educational facilities that provide new employment opportunities and support the existing major employment sectors.
- * Coordinate public and private efforts to ensure continuance of the vital tourism industry and identify opportunities to create a sustainable eco-tourism segment of the economy that takes advantage of the County's abundance of natural resource areas, such as the St. Mary's River.
- * Encourage mixed-use developments designed to accommodate multiple community activities and services in close proximity. By reducing infrastructure demand, mixed-use developments can generate a positive fiscal impact on County's financial resources. Establish design guidelines, dimensional criteria, and incentives to promote compact mixed-use development patterns. Characteristics of mixed-use zoning include multiple uses dispersed vertically, shared parking located behind buildings, public amenities such as schools and parks as community focal points, and extensive pedestrian connectivity.

Economic Impacts & Financial Feasibility:

As shown in the conclusions from the Fishkind Fiscal Sustainability Study incorporated in this Vision [2032 Vision Plan], the types of growth and development, which occur in Nassau County in the future, will have significant impacts on the financial abilities of the County to pay for current and future activities. Some very difficult choices will have to be made in order to ensure Nassau County maintains its current quality of life, pay for future growth, and ensures a continuation of the quality of life so important to residents.

- * Type of Growth Determines Fiscal Impact.
- * Not all land uses are created fiscally equal.
- * Certain land uses yield a higher fiscal benefit to Nassau County.
- * At current expenditure levels, typical residential land uses do not pay for themselves unless at very high price points.
- * Office, retail, and industrial land uses have the ability to generate positive fiscal benefit.
- * Mixed-use development also has the ability to generate a positive fiscal benefit for the County.



COMPLETE

- Fiscal Impact Analysis ('20)
- Western Nassau Visioning Plan ('19)
- Update Recreation Impact Fee ('20)
- Affordable Housing Needs Assessment ('19)
- Development Review Fee Study ('18)
- William Burgess Overlay District ('19)
- School Planning Growth Update ('20)
- Fleet Replacement Program ('19)



IN PROGRESS

- SR 200/A1A Corridor Design Plan
- Update Police, Fire & Administrative Impact Fee
- Public Facilities Space Needs 2020-2045
- Mobility Plan & Fee Update
- Historic Resource Survey
- American Beach Study
- Recreation & Park System Master Plan
- Project Administration Program & Work Flow Analysis
- Joint Planning with Incorporated Municipalities
- Conservation Land Acquisition Management Program (CLAM)



CONTINUOUS

- Capital Maintenance & Planning Program
- Staffing Plan & Administrative Capacity Planning
- Structurally Balanced Budget
- Public School Concurrency Management (Nassau County School District)



RECOMMENDED

- East Nassau Community Planning Area (ENCPA) Civic Facilities Study
- Organizational Strategic Plan

Sources

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16. Annual County and Resident Population Estimates by Selected Age Groups and Sex: April 1, 2010 to July 1, 2019 (CC-EST2019-AGESEX) SOURCE: U.S. Census Bureau, Population Division Release Date: March 2020
17. Annual Estimates of the Resident Population for Selected Age Groups by Sex for Florida: April 1, 2010 to July 1, 2019 (SC-EST2019-AGESEX-12) SOURCE: U.S. Census Bureau, Population Division Release Date: June 2020
18. Annual Estimates of the Resident Population by Single Year of Age and Sex for the United States: April 1, 2010 to July 1, 2019 (NC-EST2019-SYASEXN) SOURCE: U.S. Census Bureau, Population Division Release Date: June 2020
19. Resident Population Estimates for the 100 Fastest-Growing U.S. Counties with 10,000 or More Population in 2018: July 1, 2018 to July 1, 2019. (CO-EST2019-ANNGR) SOURCE: U.S. Census Bureau, Population Division Release Date: March 2020

Data, Image/Exhibit Credits:

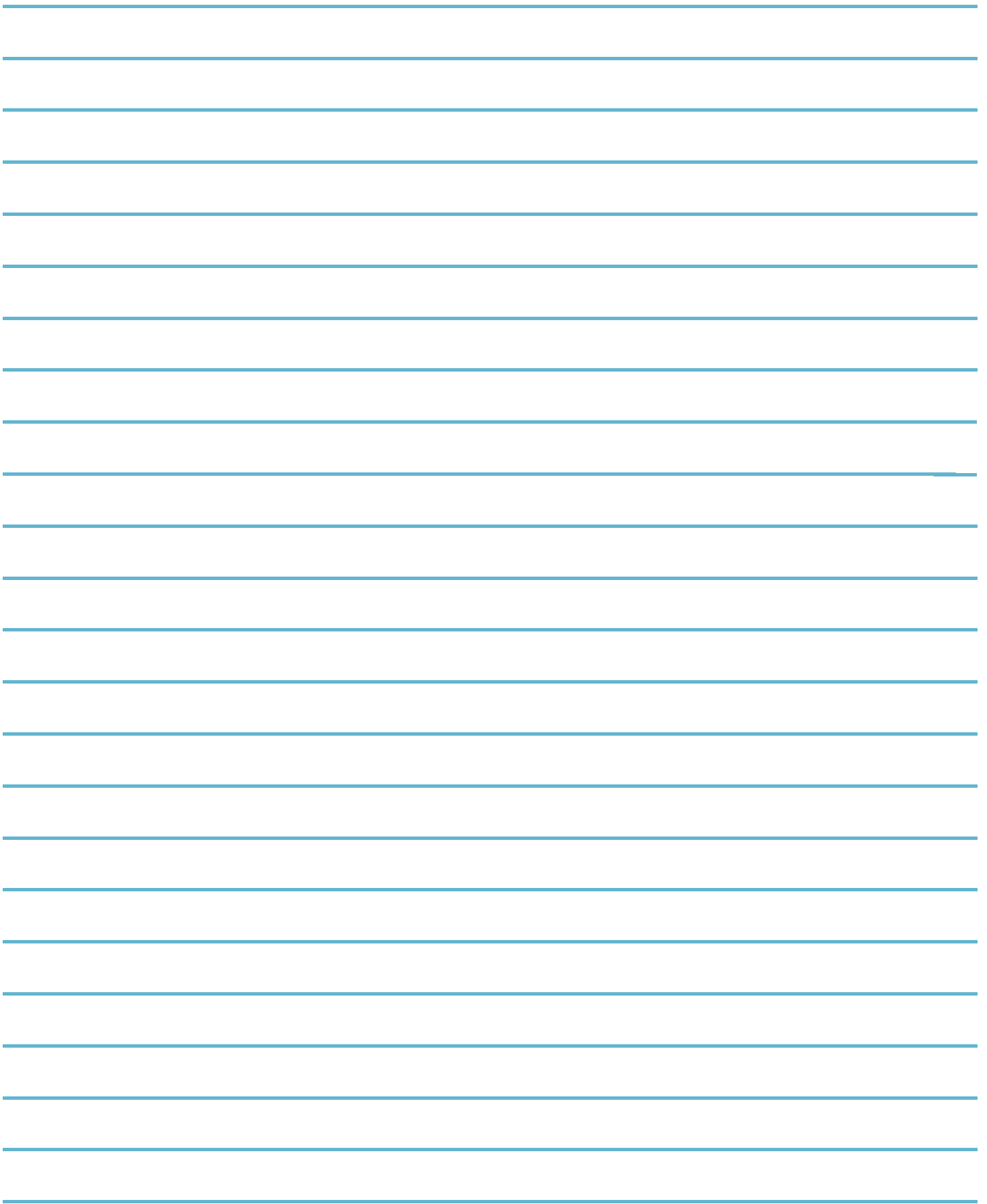
Abigail Weiss, AICP: Planner II/GIS Technician
Alyssa Neil: Planner I
Valerie Feinberg, AICP: Interim Planning Director
Taco Pope, AICP: Assistant County Manager

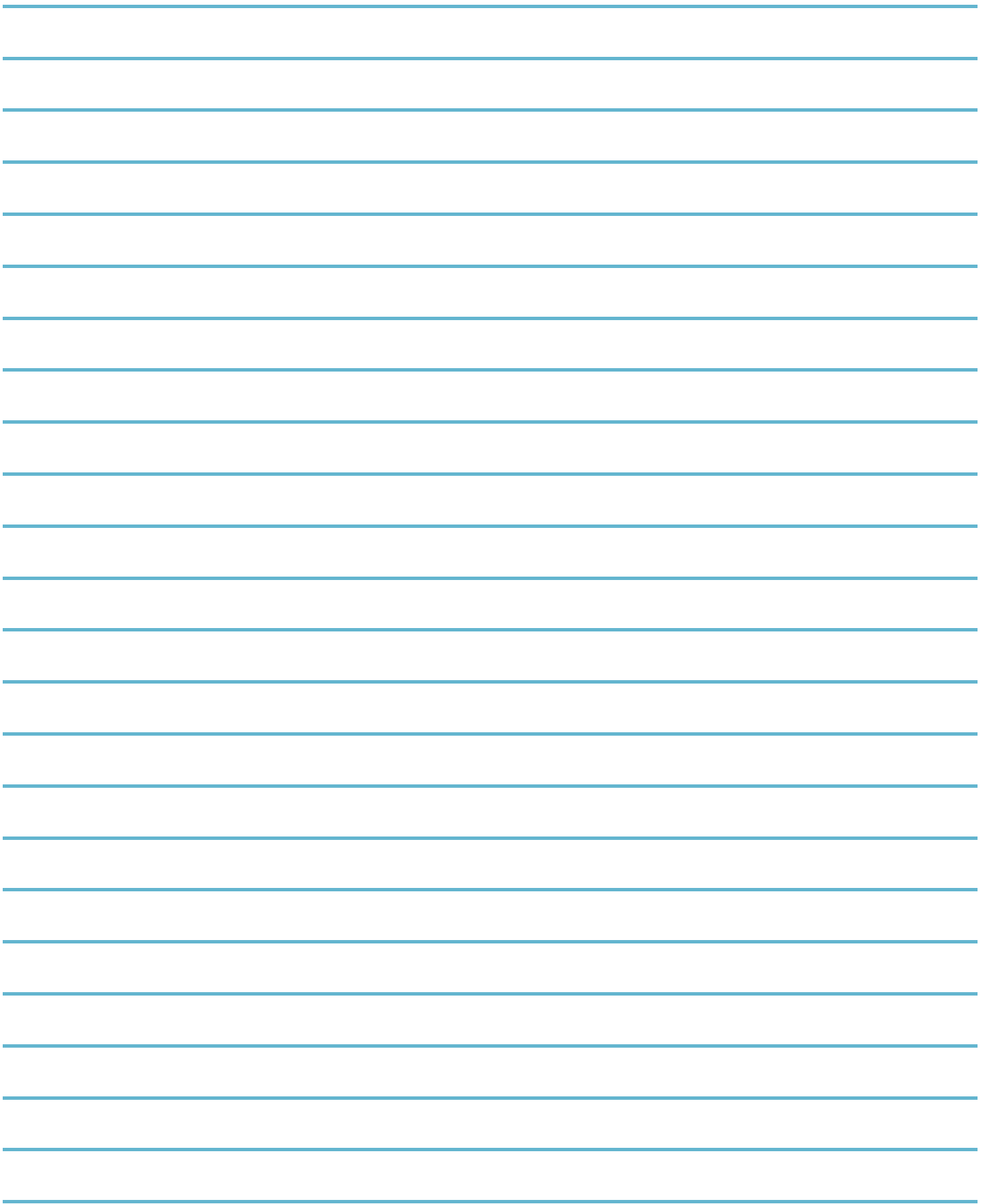
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Notes

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NASSAU COUNTY
Planning Department
FLORIDA

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