Demographics and Equity

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DEMOGRAPHIC AND EQUITY TRENDS AND CONDITIONS

Growth presents the Region with challenges and opportunities. Local governments have the opportunity to consider locations appropriate for growth, and leverage their support for projected growth areas to allow the private sector to provide quality development that will accomplish community goals and gain in value.

To address the statewide impact of future population growth, 1000 Friends of Florida contracted with the University of Florida's GeoPlan Center to prepare trend projections based on current population growth and land use patterns. The GeoPlan Center used a geographic information system (GIS) to develop graphics depicting what Florida land use might look like in 2060. These graphics assume a continuation of current development patterns. The projections show that developed areas will approximately double between 2010 and 2060 and population will increase in the First Coast Region by 1.6 million people in that same timeframe. Northeast Florida Regional Council (NEFRC) staff used geospatial analysis and the 1.6 million overall population projection to approximate County growth by 2060. The Region used this projection as it developed growth patterns through Reality Check First Coast, and extrapolated a minimum figure of 650,000 new jobs that would need to be added in the Region to sustain the additional population. The 2060 projections were simply a place to start to get participants to thinking about how and where we grow, and it was made clear they would not be used to guide infrastructure investment decisions without additional studies and evaluations. The 2060 projection remains merely a possibility, as the reliability of projections that go out 50 years is questionable.

The tables below show the estimated population of each County and the Regional totals from 1960 through 2010, as well as the projected population for 2020, 2030, and 2040 and, with the caveats above, 2060. The 2020, 2030, and 2040 figures come from the Bureau of Economic and Business Research (BEBR) at the University of Florida. BEBR produces a high, middle, and low projection for each year. In this study, the middle projection was used.

Figure 1 – Historic Population

COUNTY	1960	1970	1980	1990	2000	2010
Baker	7,363	9,242	15,289	18,486	22,259	27,115
Clay	9,535	32,059	67,059	105,986	140,814	190,865
Duval	455,411	528,865	571,003	672,971	778,879	864,263
Flagler	4,566	4,454	10,913	28,701	49,832	95,696
Nassau	17,189	20,626	32,894	43,941	57,663	73,314
Putnam	32,212	36,636	50,797	65,070	70,423	74,364
St. Johns	30,034	30,963	52,068	83,829	123,135	190,039
REGION	**556,310**	**662,845**	**800,016**	**1,018,984**	**1,243,005**	**1,515,656**

Source: US Census – 2000, and ACS - 2008

Figure 2 – Current Population & Projections

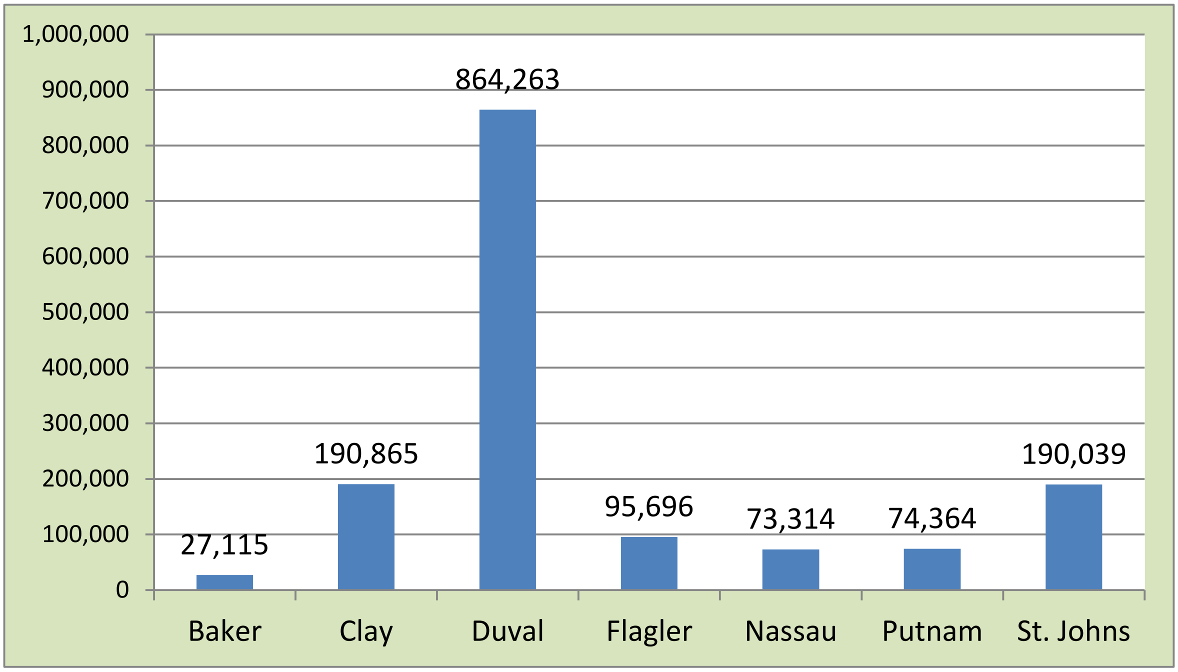
COUNTY	2010*	2020**	2030**	2040**	2060***
Baker	27,115	32,000	36,500	40,600	40,620
Clay	190,865	237,400	284,400	325,900	417,090
Duval	864,263	943,900	1,024,700	1,094,100	1,587,860
Flagler	95,696	136,900	178,600	215,400	323,800
Nassau	73,314	88,700	104,600	119,100	151,600
Putnam	74,364	77,300	80,400	82,900	104,300
St. Johns	190,039	254,200	320,000	377,600	479,160
REGION	**1,515,656**	**1,770,400**	**2,029,200**	**2,255,600**	**3,104,430**

** Census*
*** BEBR Middle*
**** See SRPP text*

2010 Estimated Population

The graph below represents the estimated population by County for the year 2010. The total Regional population estimate is 1,515,656. Population estimates are released annually by the Bureau of Economic and Business Research (BEBR) at the University of Florida.

Figure 3 – Regional Population Estimates

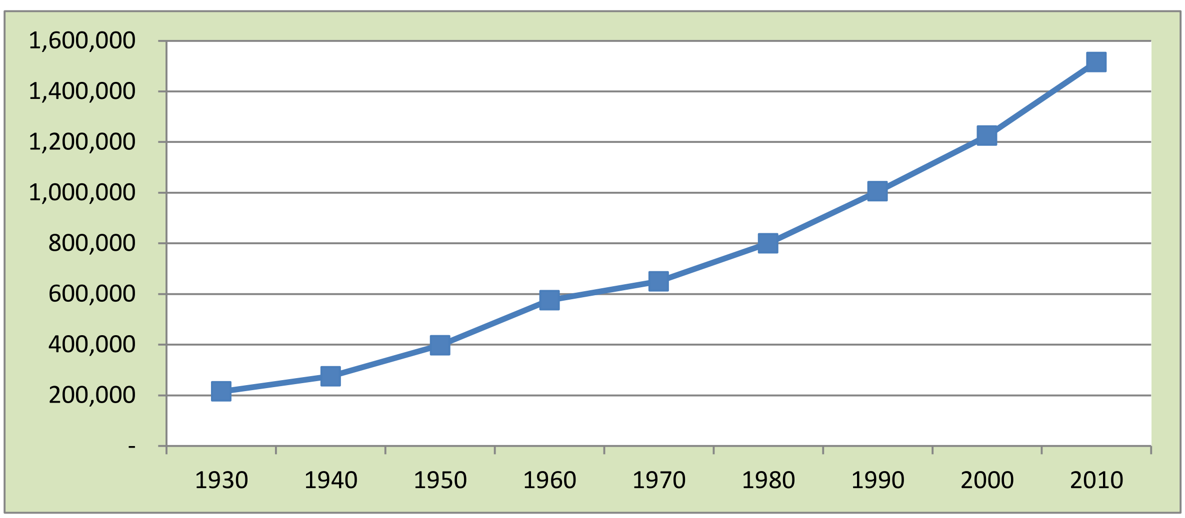


Source: Bureau of Economic and Business Research (BEBR) 2011; www.bebr.ufl.edu

Past Population Growth

The line graph illustrates steady Regional population growth since 1930. In 2010, Regional population exceeded 1.5 million people.

Figure 4 – Regional Population Growth



Source: US Census Bureau; www.census.gov

Projected Population Growth

The table provides population projections through the year 2030. Each of the Counties in the Northeast Florida Region is anticipated to continue growing. The projected Regional population in the year 2030 is over 2 million people.

Figure 5 – Projected Population Growth Through 2030

COUNTY	2010	2015	2020	2025	2030
Baker	27,115	29,601	32,001	34,299	36,504
Clay	190,865	212,698	237,398	261,502	284,400
Duval	864,263	900,995	943,894	985,506	1,024,705
Flagler	95,696	115,000	136,901	158,272	178,570
Nassau	73,314	80,600	88,700	96,803	104,599
Putnam	74,364	75,702	77,301	78,899	80,397
St. Johns	190,039	220,201	254,302	288,093	320,002
REGION	**1,515,656**	**1,634,797**	**1,770,497**	**1,903,374**	**2,029,177**

Source: Bureau of Economic and Business Research (BEBR) 2011; www.bebr.ufl.edu

Age of Regional Residents Now and Projected

The following table provides population projections by age through the year 2030. Every age category is expected to grow, with the largest population growth taking place in age groups greater than 60.

Figure 6 – Northeast Florida Regional Population by Age Through 2030

AGE	2010	2015	2020	2025	2030
Total	1,515,656	1,634,797	1,770,497	1,903,374	2,029,177
0-4	96,847	99,111	105,647	113,858	119,858
5-9	97,326	105,136	105,002	113,362	121,817
10-14	100,305	106,190	113,785	112,753	119,652
15-19	103,199	104,153	115,388	119,097	119,065
20-24	100,415	110,886	108,533	124,146	123,108
25-29	102,756	108,521	118,860	119,634	131,255
30-34	94,441	108,554	116,721	128,872	129,052
35-39	98,841	98,813	114,620	123,585	137,370
40-44	103,207	102,997	103,460	120,303	129,090
45-49	116,195	106,553	107,493	107,654	124,710
50-54	112,302	119,740	110,006	111,868	110,445
55-59	99,858	115,710	123,584	114,762	114,956

AGE	2010	2015	2020	2025	2030
60-64	89,371	101,154	119,428	126,499	118,227
65-69	66,312	86,580	102,655	116,609	127,940
70-74	47,946	61,322	84,059	95,540	112,562
75+	86,335	99,377	121,256	154,832	190,070

Source: University of Florida Bureau of Economic and Business Research, Population Projections; U.S. Census Bureau, 2010 Decennial Census.

Race of Residents Now and Projected

The table provides current population estimates by race, as well as population projections by race through the year 2030. Although whites will remain the largest share of the population, Hispanics will experience the largest growth rate through the year 2030.

Figure 7 – Regional Population Projections by Race, 2000-2030

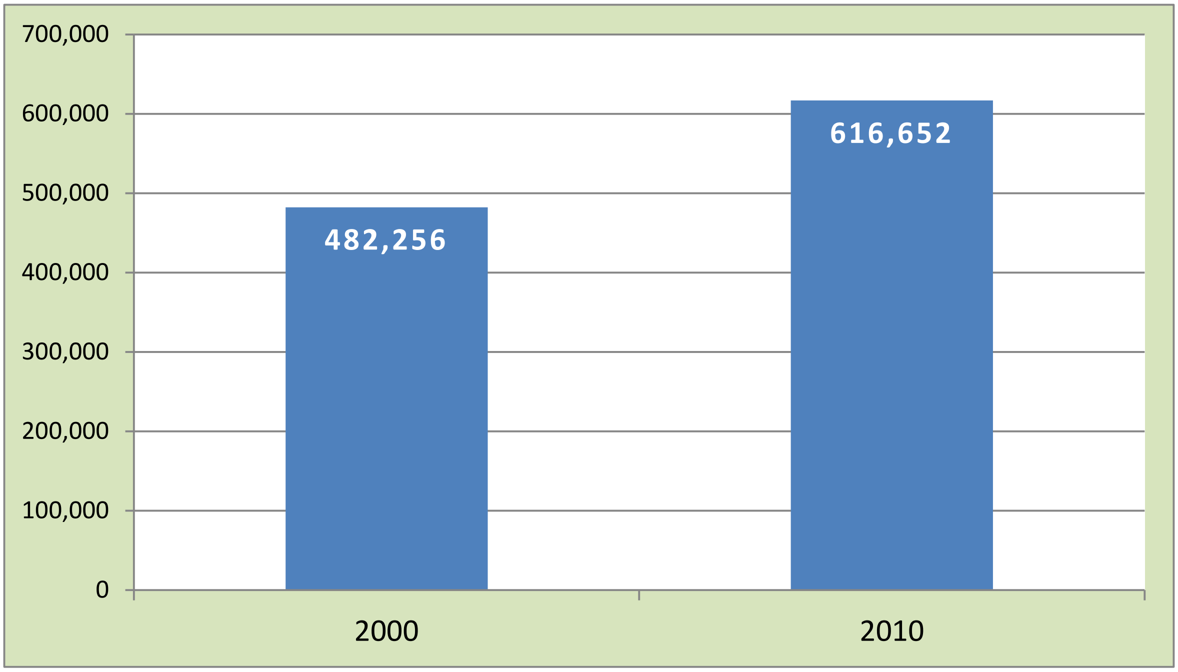
	CENSUS COUNTS	PROJECTIONS	
RACE	**2010**	**2020**	**2030**
White	1,012,000	1,137,600	1,265,200
Black *(Non-Hispanic)*	309,200	371,200	433,200
Hispanic	107,836	154,586	202,939

**2011 Florida Statistical Abstract Tables 1.32, 1.53, 1.56*

Regional Households

The following bar graph indicates the total number of projected households within the Region for the years 2000 and 2010. The Region has experienced an approximate 28% growth in the total number of households over the period. The Shimberg Center for Housing Studies publishes this information on an annual basis.

Figure 8 – Projected Regional Households

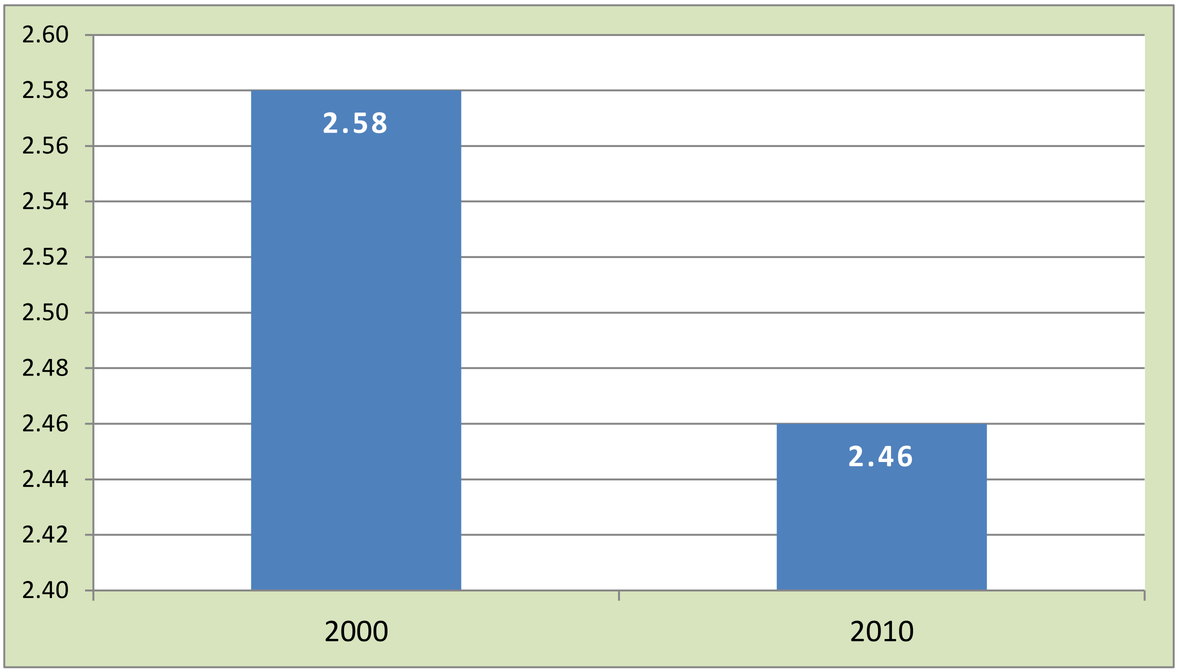


Source: Florida Housing Data Clearinghouse, Shimberg Center for Housing Studies; www.shimberg.ufl.edu

Regional Household Size

The following bar graph represents the average household size throughout the Northeast Florida Region. This graph represents the years 2000 and 2010, and shows a slight decline in the average number of people per household. The Bureau of Economic and Business Research (BEBR) at the University of Florida releases information on household size annually.

Figure 9 – Regional Household Size



Source: US Census Bureau – 2000; www.census.gov
2009 Florida Statistical Abstract, Bureau of Business and Economic Research (BEBR); www.bebr.ufl.edu

STRATEGIC ISSUE: POPULATION TRENDS[1]

The Northeast Florida Region experienced rapid population growth through 2007 before dropping rapidly at the start of the recession. Prior to the recession, in the 2000s, the Region's population base grew by an average of 30,000 new persons a year. Net migration outpaced births during this period, accounting for 56% of new residents.

In summary, if the Region remains status quo, Northeast Florida will become older, less educated, and less diverse than its Regional competitors in Florida (i.e., Tampa, Orlando, and Miami). However, through capitalizing on the three major state universities accessible

[1] *Source: Innovate Northeast Florida: Economic Development Strategic Plan, Competitive Analysis, May 2012.*

to the Region, attracting high-tech industries, and rebranding itself, Northeast Florida will attract a younger, more educated and dynamic workforce.

Figure 10 – Regional Population Trends

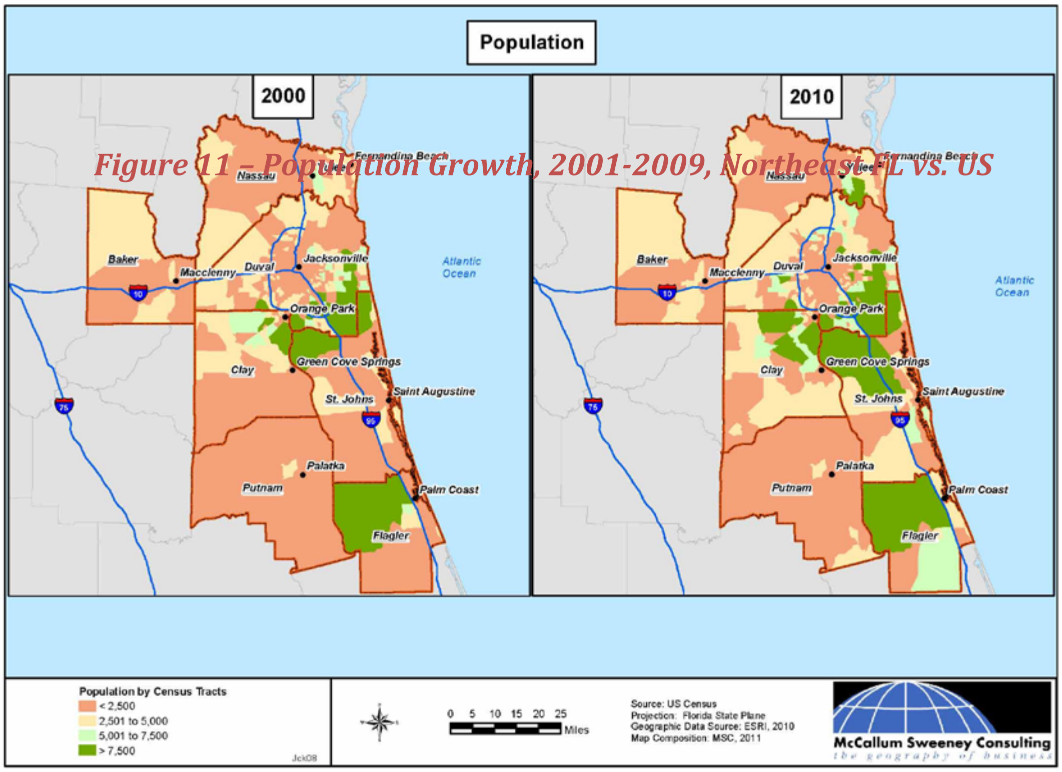


Figure 11 – Population Growth, 2001-2009, Northeast FL vs. US

Source: Innovate Northeast Florida: Economic Development Strategic Plan, Competitive Analysis, May 2012

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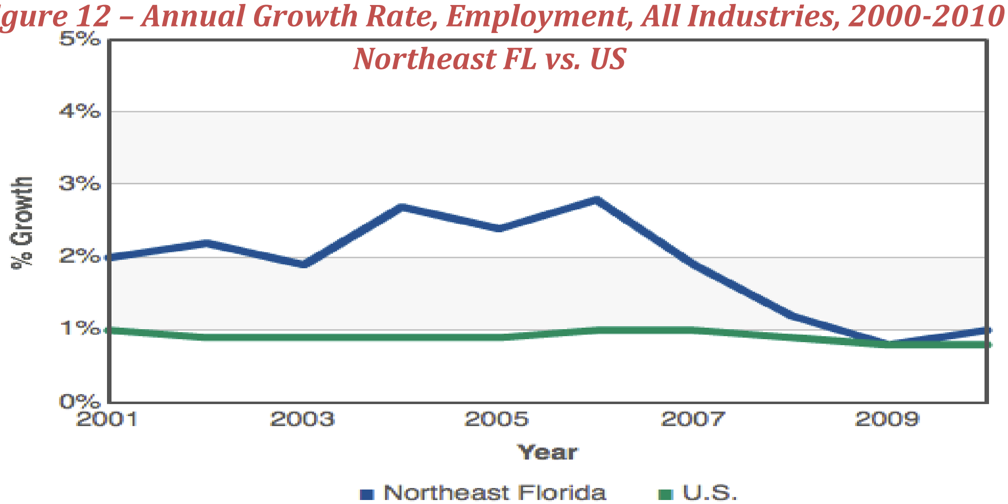
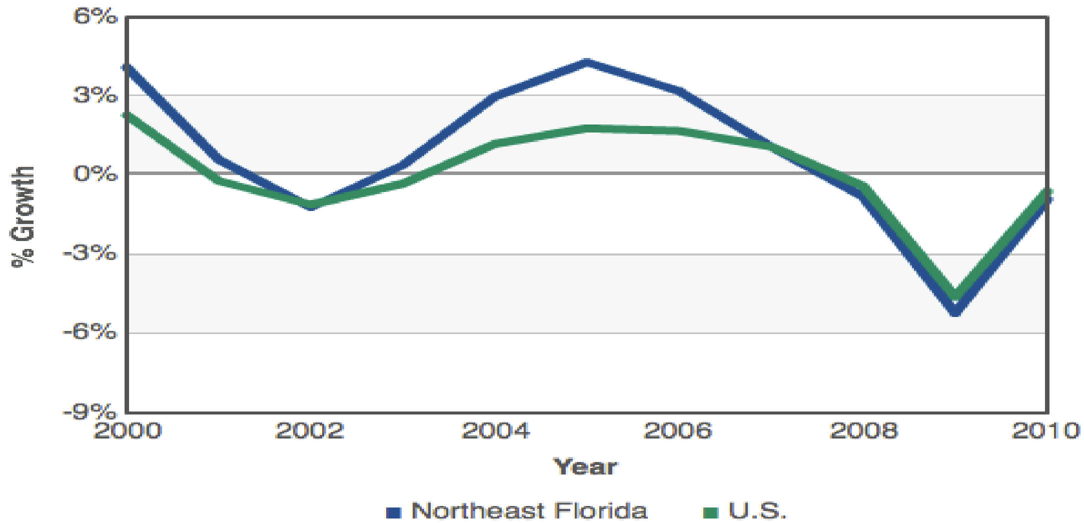
Figure 12 – Annual Growth Rate, Employment, All Industries, 2000-2010 Northeast FL vs. US

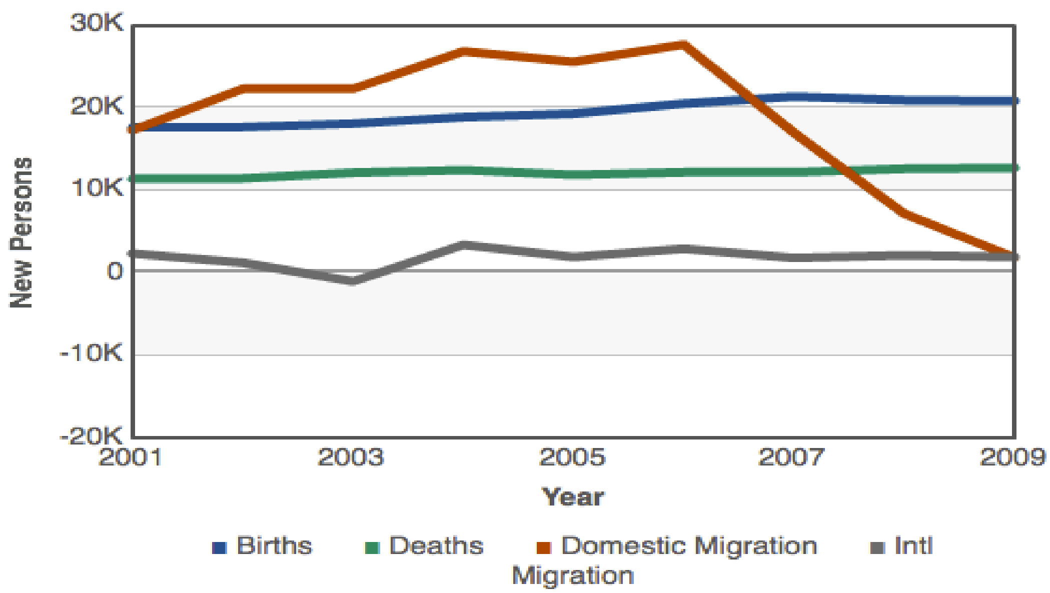


ce: Innovate Northeast Florida: Economic Development Strategic Plan, Competitive Analysis, May 2012



Source: Innovate Northeast Florida: Economic Development Strategic Plan, Competitive Analysis, May 2012

Figure 13 – Population Change Components, 2001-2009 Northeast Florida



Source: Innovate Northeast Florida: Economic Development Strategic Plan, Competitive Analysis, May 2012

STRATEGIC ISSUE: THE REGION'S AGE STRUCTURE[2]

Northeast Florida's age distribution is slightly over-represented by the older demographics, which have been growing faster than other age groups. Northeast Florida saw the largest population gains among those aged 55-59 (26,100 new residents), 25-29 (20,000), and 45-49 (16,800).

Young adults, who typically drive growth in metros across the U.S., are both under-represented in Northeast Florida and saw the lowest growth rates of the age groups. Population aged 30-34 saw a modest increase between 2004-2009 and the population aged 35-39 actually shrank.

It is projected the 65 years of age and older population will see the greatest increase between 2006 and 2030. In some areas, by 2030 the 65 years of age and older population is projected to double.

Nearly three-quarters (72%) of the Region's population today is white.[3] Approximately 22% of the population is Black, and only 6% of the population is Hispanic.[4] Statewide, approximately 68% of the population is White, 15% Black and 17% Hispanic.[5]

Regionally, Hispanics and Latinos are projected to have the largest increase in numbers when compared to their current population. By 2030, the Hispanic and Latino populations are projected to increase by 106,146.[6] This represents 7% of the projected 2030 population for the Northeast Florida Region.

[2] *Source: Innovate Northeast Florida: Economic Development Strategic Plan, Competitive Analysis, May 2012.*
[3] *Bureau of Economic and Business Research, University of Florida*
[4] *Bureau of Economic and Business Research, University of Florida*
[5] *Bureau of Economic and Business Research, University of Florida*
[6] *Bureau of Economic and Business Research, University of Florida*

Figure 14 – Monthly Foreclosures in Northeast Florida, 2006-2011

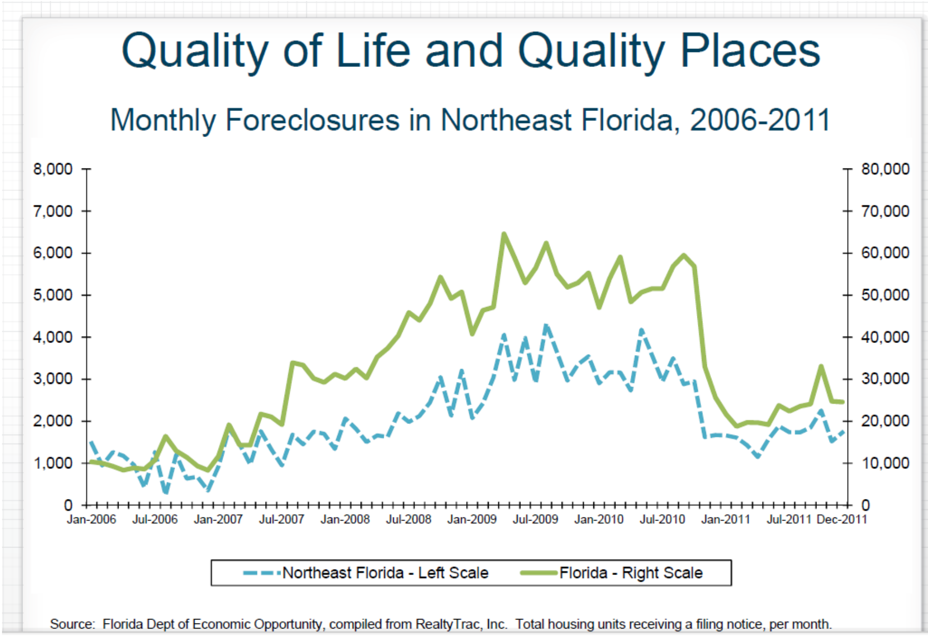
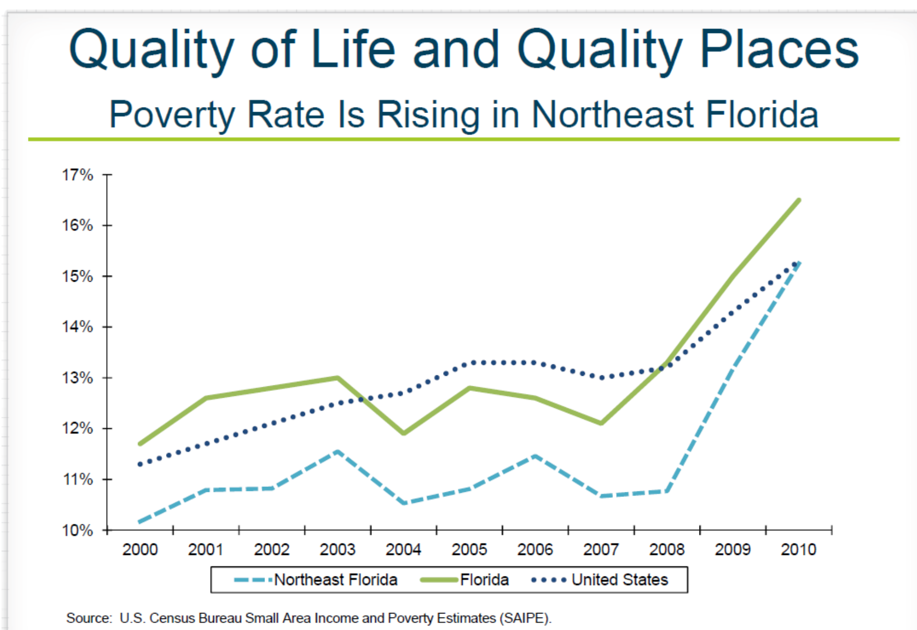


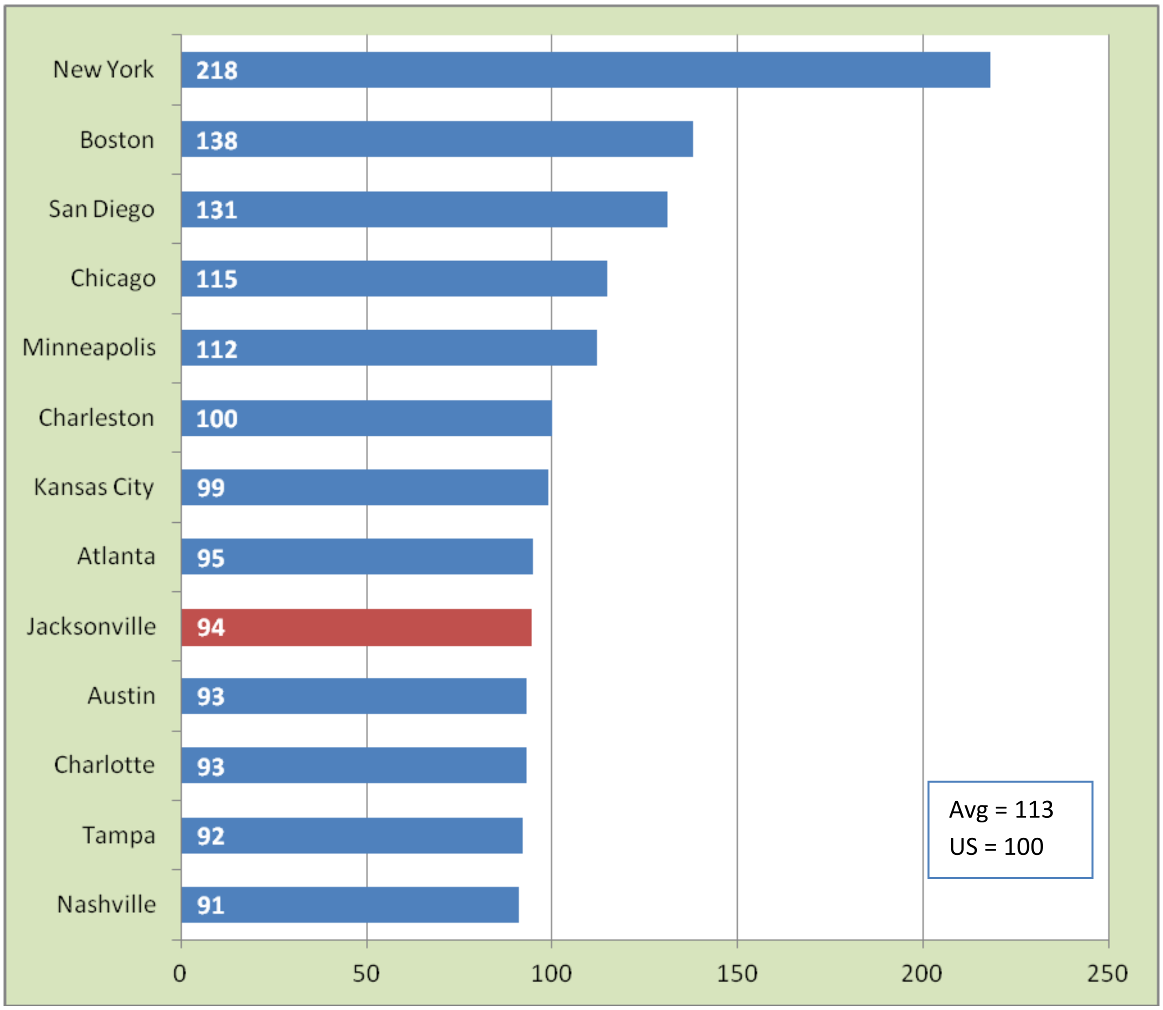
Figure 15 – Poverty Rate



Strategic Issue: Cost of Living

Jacksonville has a lower cost of living than the U.S. and benchmark averages, with costs only slightly above the least expensive benchmark Region. Jacksonville received an ACCRA Cost of Living Index rating of 94 in 2011, below the U.S. standard of 100 and far from the benchmark average rating of 113. The only benchmark communities rated less expensive than Jacksonville were Austin, Charlotte, Tampa, and Nashville.

Figure 16 – Cost of Living Index, 2011



Source: Cost of Living Index, http://www.coli.org/

DEMOGRAPHIC OVERVIEW

The Regional trend in demographics is toward growth, even if growth has slowed in the immediate past. It is also trending toward an aging population, a more diverse population and toward smaller household sizes. All of these trends highlight the need for a Regional plan framework to provide the vision to accommodate new residents, seniors and our diverse population in a vibrant and desirable Region.

OBJECTIVE AND POLICIES

OBJECTIVE: A REGION WHERE ALL PEOPLE CAN THRIVE

Policies

Policy 1: The Region promotes use of partnerships and non-traditional methods to engage all residents.
Pillar: Quality of Life and Quality Places, SCP: 187.201(15)(a)F.S.

Policy 2: The Region will support its local governments and share best practices as they develop ways to gather public input from citizens in all parts of the Region.
Pillar: Quality of Life and Quality Places, SCP: 187.201(15)(a)F.S.

Policy 3: The Region will measure its success by evaluating not simply overall measures but will measure the success of all income, age, and racial groups.
Pillar: Quality of Life and Quality Places, SCP: 187.201(15)(a)F.S.

Policy 4: Non-compact development patterns and limited mobility options are a barrier to success for all, and have a greater impact on low-income residents, seniors and those with disabilities or health challenges. The Region supports more compact development connected by transportation corridors.
Pillar: Quality of Life and Quality Places, SCP: 187.201(19)(a)F.S.

DEMOGRAPHICS AND EQUITY MEASURES

Figure 17 – Median Household Income by Race

RACE	REGION	FLORIDA	UNITED STATES
White	$55,212	$46,806	$52,480
Black	$34,425	$32,299	$33,578
Hispanic	$43,694	$38,288	$40,165

Source: 2008-2010 American Community Survey, 3 year estimates

Figure 18 – Median Household Income by Age

	REGION	FLORIDA	UNITED STATES
Less than 25	$28,524	$23,640	$24,143
25 to 44	$54,590	$47,993	$54,024
45 to 64	$59,142	$52,102	$60,683
65 and Over	$38,547	$35,024	$34,381

Source: 2008-2010 American Community Survey, 3 year estimates

Figure 19 – Regional per Capita Income

Per Capita Income	$26,111

Source: 2008-2010 American Community Survey, 3-Year Estimates

Figure 20 – Persons Living in Poverty

Persons Living in Poverty	207,469 (approximately 14% of the Regional population)

Source: 2008-2010 American Community Survey, 3-Year Estimates

Figure 21 – Regional Alliance Membership

Regional alliance membership	7 Counties, 49 members: (16 Regional entities, 4 state/ federal advisors, 3 small business, 5 municipalities, 1 utility, 1 health, 1 chamber, 13 non-profits, 1 university)

Source: NEFRC, membership of the First Coast Consortium

Figure 22 – RLA Annual Graduation

Annual Graduation from the Regional Leadership Academy	12 in 2012

Source: NEFRC

Figure 23 – Educational Attainment by Race

RACE	HS DIPLOMA OR GED	ASSOCIATES	BACHELORS	GRADUATE
White	30.0%	8.5%	18.2%	8.9%
African American	30.9%	9.4%	10.7%	4.9%
Hispanic	23.9%	9.8%	13.2%	6.4%

Source: 2008-2010 American Community Survey, 3 year Estimates