2018
RESIDENTIAL CAPACITY AND VACANT LAND ANALYSIS

Martin County Board of County Commissioners

Approved February 13, 2018

INTRODUCTION

Objective 4.1D of the Martin County Comprehensive Growth Management Plan (CGMP) requires the County to "*to collect and monitor development and population data to ensure sufficient land to address projected population needs.*"

The residential capacity analysis is made up of three parts. First, population projections are calculated in accordance with Policy 4.1D.2. This residential capacity and vacant land analysis is based on the 2017 Population Technical Bulletin, adopted by the Board of County Commissioners on July 25, 2017. The estimates and projections are primarily based on the 2010 United States Census and the Bureau of Economic and Business Research (BEBR) annual report on population for the State of Florida Office of Economic and Demographic Research (EDR).

The second part of the analysis is to determine the future demand for residential units to accommodate the projected population. Calculations of demand are derived from formulas provided in Policy 4.1D.3. The demand calculations used in this analysis are provided in the 2018 Residential Demand Analysis.

The third part of the analysis is to determine the supply of residential units. Consistent with Policy 4.1D.5, the residential capacity and vacant land analysis defines the available residential development options that can accommodate the demand from the projected population.

This report is broken down in three Sections. Section I breaks down Policy 4.1D.5 into five parts to show the supply of units from each category. Section II provides a summary of the total number of units identified in Section I. Section III compares the supply of units in Section II to the residential demand found in the 2018 Residential Demand Analysis.

SECTION I

Policy 4.1D.5 Residential Supply to Meet Demand

The units needed (demand) in the 10 year period and the units needed in the 15 year period must be compared to the supply of vacant land and vacant units to determine if there is residential capacity in the urban service districts. The methodology to determine the supply of land and units is found in Policy 4.1D.5. The policy is broken down into five parts, and therefore the methodology in this analysis is broken down into five parts.

Below is Policy 4.1D.5 that outlines the parameters to be measured for the supply of units available to meet the demand in the previous section:

> Policy 4.1D.5 Residential capacity analysis. Martin County shall produce a residential capacity analysis every five years. Residential capacity defines the available residential development options within the Primary and Secondary Urban Service Districts that can meet the demand for population growth consistent with the Future Land Use Map.
>
> Residential supply shall consist of:
> (1) Vacant property that allows residential use according to the Future Land Use Map. The maximum allowable density shall be used in calculating the number of available units on vacant acreage. For the purpose of this calculation, the maximum allowable density for wetlands shall be one-half the density of a given future land use designation.
>
> (2) Subdivided single family and duplex lots. The following lot types shall be included in the residential capacity calculation:
> (a) Vacant single family or duplex lots of record as of 1982 developed prior to the County's tracking of development approvals.
> (b) Vacant single family or duplex lots of record platted after 1982.
>
> (3) Potential for residential development in Mixed Use Overlays.
>
> (4) Excess vacant housing not in use by permanent or seasonal residents. Excess vacant housing is a vacancy rate higher than 3% of the number of housing units in actual use.
>
> (5) The eastern Urban Service District and the Western Urban Service District shall be considered separately.
>
> **NOTE: Chapter 2017-195, Laws of Florida, authorized the creation of the Village of Indiantown, pending a vote of the qualified electors residing within the corporate limits of the Village. On November 9, 2017 the residents voted to incorporate into the Village of Indiantown. The current methodology in the CGMP requires an analysis for the western urban service district, which is**

included in this report. Staff has not included the Village in the supply due to its incorporation.

Vacant land

(1) Vacant property that allows residential use according to the Future Land Use Map. The maximum allowable density shall be used in calculating the number of available units on vacant acreage. For the purpose of this calculation, the maximum allowable density for wetlands shall be one-half the density of a given future land use designation.

The table below shows the calculation of vacant land available. This excludes units in the Mixed Use Overlays, which are considered in part (3) below.

Table 1
Potential Units in the Primary USD

Future Land Use	Units per Acre	Total Acres	Wetland Probability Acreage	Total Acres less wetlands	Dwelling Units	Wetland Density Transfer (units)	Units at Maximum Density (Rounded)
Comm. Waterfront	10	19.7	0.28	19.42	194.2	1.4	196
Comm/Off/Res	10	19.04	1.99	17.05	170.5	9.95	180
Estate Density 2 UPA	2	181.12	48.33	132.79	265.58	48.33	314
High Density	10	12.6	0.02	12.6	126	0	126
Medium Density	8	14.16	0.01	14.16	113.28	0	113
Low Density	5	222.74	17.67	205.07	1025.35	44.175	1,070
Mobile Home	8	5.12	0	5.12	40.96	0	41
Rural Density	0.5	96.09	36.88	59.21	29.605	9.22	39
Total		**570**					**2,079**

Table 2 Potential Units in the Secondary USD							
Future Land Use	**Units per Acre**	**Total**	**Wetland Probability Acreage**	**Acres less wetlands**	**Dwelling Units**	**Wetland Density Transfer**	**Units at Maximum Density (Rounded)**
Rural	0.5	1,526.41	594.35	932.06	466.03	148.59	615
Ag Ranchette	0.2	28.45	15.85	12.60	2.52	1.59	4
Total							**619**

Summary table of potential units, Part (1):

Urban Service District	**Units at Maximum Density**
Vacant Primary USD	**2,079**
Vacant Secondary USD	**619**
Total	**2,696**

(2) Subdivided single family and duplex lots. The following lot types shall be included in the residential capacity calculation:

(a) Vacant single family or duplex lots of record as of 1982 developed prior to the County's tracking of development approvals.

USD	**Lots**
Primary	1,282
Secondary	12

(b) Vacant single family or duplex lots of record platted after 1982.

The table below illustrates the number of lots of record after 1982:

USD	**Lots**
Primary	341
Secondary	316

The **total** number of vacant lots of record for the Eastern Primary Urban Service District **1,623.** The total for the Secondary Urban Service District is **328**.

(3) Potential for residential development in Mixed Use overlays.

The vacant land within a CRA mixed use overlay available for residential development is shown in the table, as outlined in 4.1D.5(3). All Mixed Use areas are within a CRA.

CRA Vacant (MU)	Units per Acre	Total	Wetland Probability Acreage	Acres less wetlands	Dwelling Units	Wetland Density Transfer	Units at Maximum Density (Rounded)
Future Land Use							
Comm. General	11.25	13.60	0.00	13.60	153.00	0.00	153.00
Comm. Limited	11.25	16.37	0.00	16.37	184.16	0.00	184.16
Comm/Off/Res	11.25	21.65	0.07	21.58	242.78	0.39	243.17
Comm. Waterfront	11.25	6.71	0.00	6.71	75.49	0.00	75.49
Low Density	11.25	1.78	0.00	1.78	20.03	0.00	20.03
Medium Density	11.25	17.03	0.50	16.53	185.96	2.81	188.78
Mobile Home	11.25	6.45	0.00	6.45	72.56	0.00	72.56
Industrial	11.25	2.05	0.00	2.05	23.06	0.00	23.06
Total		**85.64**					**960**

(4) Excess vacant housing not in use by permanent or seasonal residents. Excess vacant housing is a vacancy rate higher than 3%* of the number of housing units in actual use.

Excess Vacant Residential Units

Residential Unit Census Data		**Units**	**Total**
Line 1	Occupied housing units (HO) in use by permanent population.	52,883	
Line 2	Vacant seasonal housing units (HS) occupied less than six months of the year	6,140**	
Line 3	Add Line 1 and Line 2 for housing units in actual use (HU).		59,023
Line 4	Vacant housing not in seasonal use	4,066***	
Line 5	Add Line 3 and Line 4 for total residential units.		63,089

Source: 2010 U.S. Census

*Note: This assumption is supported in the *Planner's Estimating Guide, Projecting Land-Use and Facility Needs*, pages 24 – 25, Arthur C. Nelson, FAICP, 2004.

** Indiantown Units Removed (92 units from Census Tract 18.01)

***Note: From 2018 Demand Analysis

Calculation of excess vacant residential units

Unit data from table above			Units
Line 1	Vacant housing not in seasonal use		4,066
Line 2	3% of 59,023 housing units in actual use =	1770.69 (round to 1,771)	1,771
Line 3	Subtract Line 2 from Line 1 to calculate vacant units available for occupancy.		2,295

The 2,295 excess vacant units are allocated by location. In accordance with Policy 4.1D.4, these units are assigned to the Primary, Secondary or are assigned outside the Urban Service Districts based on the allocation Certificates of Occupancy calculated in the Residential Demand Analysis, shown below.

Number of Certificates of Occupancy by Location, 2012 through 2016

Urban Service District	2012	2013	2014	2015	2016	Total	Average	Percent of Total
Eastern	**266**	**300**	**320**	**288**	**248**	**1422**	**284**	**93.06%**
Primary	266	297	315	258	236	1372	274	89.79%
Secondary	0	3	5	30	12	50	10	3.27%
Outside	**8**	**16**	**15**	**39**	**28**	**106**	**21**	**6.94%**
Total	**274**	**316**	**335**	**327**	**276**	**1528**	**306**	**100%**

Source: Martin County Growth Management, using KIVA database

Using the CO percentage data in the table above, the excess vacant housing is allocated into the Urban Service Districts or outside the Urban Service Districts, as shown in the table below.

Urban Service District	Percent of Total	Excess vacant units
Eastern Primary	89.79%	2,060
Eastern Secondary	3.27%	75
Outside	6.94%	160
Total	**100.00%**	**2,295**

SECTION II. SUMMARY OF THE SUPPLY OF POTENTIAL UNITS

Below is a summary of sections (1) through (4) of Policy 4.1D.5 to illustrate the total number of units available to accommodate future demand.

Supply of Units Primary Urban Service District From Policy 4.1D.5	Supply of Units Primary Urban Service District	Supply of Units Secondary Urban Service District
(1) Vacant Land	2,079	619
(2) (a) Pre-1982 Lots of Record	1,282	12
(b) Post-1982 Lots of Record	341	316
(3) Mixed Use Overlay	960	0
(4) Excess Vacancies	2,060	75
(5) Approved multifamily units*	197	0
Total	**6,919**	**1,022**

*Note: The methodology for counting multifamily units in the 2013 supply calculation was not approved by the Administration Commission. Therefore, only unbuilt multifamily units in approved final site plans have been included.

SECTION III. COMPARISON OF RESIDENTIAL DEMAND AGAINST SUPPLY

The language in Policy 4.1D.5 contains the following requirement:

> *The 15 year planning period for residential capacity began with the 2010 Census and shall be updated to a new 15 year planning period every 5 years. The residential capacity analysis showing the total residential supply within the Primary and the Secondary Urban Service Districts shall be compared to the projected residential demand as outlined in Policy 4.1D.3. and 4.1D.4 above. The report shall show demand and supply comparisons for a ten year period as well as for the 15 year planning period.*

Therefore the residential demand for a ten-year and fifteen-year planning period will be compared to the amount of land available to accommodate that demand. The residential demand is taken from the 2018 Residential Demand Analysis.

Eastern Urban Service Districts	2025 Demand	Unit Supply	Percent of Need in the 10-year planning period
Primary	4,240	6,919	163%
Secondary	154	1,022	663%
Total	**4,394**	**8,252**	**187%**

2016 – 2030 Analysis of Supply versus Demand

Eastern Urban Service District	2030 Demand	Unit Supply	Percent of Need in the 15-year planning period
Primary	6,360	6,919	109%
Secondary	231	1,022	442%
Total	**6,591**	**8,252**	**125%**

PURSUANT TO 4.1D.5 for consideration purposes only

Residential Capacity for the Village of Indiantown

Table 1 Potential Units in the Village of Indiantown - Primary							
Future Land Use	**Units per Acre**	**Total**	**Wetland Probability Acreage**	**Acres less wetlands**	**Dwelling Units**	**Wetland Density Transfer**	**Units at Maximum Density (Rounded)**
Estate Density 2 UPA	2	434.83	93.85	340.98	681.96	93.85	776
Medium Density	8	72.61	16.81	55.8	446.4	67.24	514
Low Density	5	990.21	176.02	814.19	4070.95	440.05	4,511
Total		**1497.65**					**5,800**

Table 2
Potential Units in the Village of Indiantown - Secondary

Future Land Use	**Units per Acre**	**Total**	**Wetland Probability Acreage**	**Acres less wetlands**	**Dwelling Units**	**Wetland Density Transfer**	**Units at Maximum Density (Rounded)**
Rural	0.5	49.98	16.54	33.44	16.72	4.14	21
Ag Ranchette	0.2	122.75	3.4	119.35	23.87	0.34	24
Total							**45**

Summary table of potential units, Part (1):

Village of Indiantown	**Units at Maximum Density**
Vacant Primary USD	**5,800**
Vacant Secondary USD	**45**
Total	**2,696**

(2) Subdivided single family and duplex lots. The following lot types shall be included in the residential capacity calculation:

(a) Vacant single family or duplex lots of record as of 1982 developed prior to the County's tracking of development approvals.

USD	Lots
Primary	156
Secondary	12

(a) Vacant single family or duplex lots of record as of 1982 developed prior to the County's tracking of development approvals.

USD	Lots
Primary	67
Secondary	0

The **total** number of vacant lots of record for the Village of Indiantown Primary Urban Service District **224.** The total for the Secondary Urban Service District is **12**.

(3) Potential for residential development in Mixed Use overlay.

CRA Vacant (MU)	Units per Acre	Total	Wetland Probability Acreage	Acres less wetlands	Dwelling Units	Wetland Density Transfer	Units at Maximum Density (Rounded)
Future Land Use							
Comm. General	11.25	131.48	2.47	129.01	1,451.36	13.89	1,465.26
Industrial	11.25	166.66	8.33	158.33	1,781.21	46.86	1,828.07
Comm/Off/Res	11.25	29.65	0.07	29.58	332.78	0.39	333.17
Comm. Waterfront	11.25	34.22	0.00	34.22	384.98	0.00	384.98
High	11.25	1.32	0.00	1.32	14.85	0.00	14.85
Low Density	11.25	112.18	35.79	76.39	859.39	201.32	1,060.71
Medium Density	11.25	10.86	0.50	10.36	116.55	2.81	119.36
Total		**486.37**					**5,206**

(4) Excess vacant housing not in use by permanent or seasonal residents. Excess vacant housing is a vacancy rate higher than 3%* of the number of housing units in actual use.

Excess Vacant Residential Units
Village of Indiantown – Census Tract 18.01

Residential Unit Census Data		**Units**	**Total**
Line 1	Occupied housing units (HO) in use by permanent population.	1,826	
Line 2	Vacant seasonal housing units (HS) occupied less than six months of the year	63	
Line 3	Add Line 1 and Line 2 for housing units in actual use (HU).		1,918
Line 4	Vacant housing not in seasonal use	162***	
Line 5	Add Line 3 and Line 4 for total residential units.		2,080

Source: 2010 U.S. Census,
*Note: This assumption is supported in the *Planner's Estimating Guide, Projecting Land-Use and Facility Needs*, pages 24 – 25, Arthur C. Nelson, FAICP, 2004.
***Note: From 2018 Demand Analysis

Calculation of excess vacant residential units

Unit data from table above			**Units**
Line 1	Vacant housing not in seasonal use		162
Line 2	3% of 1918 housing units in actual use =	57.54 (round to 58)	58
Line 3	Subtract Line 2 from Line 1 to calculate vacant units available for occupancy.		104

The 104 excess vacant units are allocated by location. In accordance with Policy 4.1D.4, these units are assigned to the Primary, Secondary or are assigned outside the Urban Service Districts based on the allocation Certificates of Occupancy shown in the Residential Demand Analysis, shown below.

Supply of Units Primary Urban Service District From Policy 4.1D.5	**Supply of Units Primary Urban Service District**	**Supply of Units Secondary Urban Service District**
(1) Vacant Land	**5,800**	**45**
(2) (a) Pre-1982 Lots of Record	156	12
(b) Post-1982 Lots of Record	67	0
(3) Mixed Use Overlay	**5,206**	0
(4) Excess Vacancies	104	0
(5) Approved multifamily units*	0	0
Total	**11,333**	**57**

SECTION III. COMPARISON OF RESIDENTIAL DEMAND AGAINST SUPPLY

2016 – 2025 Analysis of Supply versus Demand

Eastern Urban Service Districts	2025 Demand	Unit Supply	Percent of Need in the 10-year planning period
Primary	6,869	11,333	164%
Secondary	154	57	37%
Total	**7,023**	**11,390**	**162%**

2016 – 2030 Analysis of Supply versus Demand

Eastern Urban Service District	2030 Demand	Unit Supply	Percent of Need in the 15-year planning period
Primary	7,103	11,333	159%
Secondary	1,075	57	530%
Total	**8,178**	**11,390**	**139%**