

## SUMMARY

The primary purpose of the Future Land Use Element is to provide for an effective and efficient balance of the City's anticipated growth demands with its goals for protecting its natural and cultural resources. Further, the goal of the Future Land Use Element is to encourage land uses that promote economic viability for the community while reducing adverse impacts on the natural or cultural environment. The objectives and policies within the Future Land Use Element serve to facilitate its goal through provisions for energy efficient development, growth management, natural resource protection, redevelopment, nonconformities, community character, land use categories, commercial and mixed use land conversion, airport facilities, and availability of land for infrastructure and public school facilities. This element is arguably the most important element in the City's Comprehensive Plan as it lays the foundation upon which the rest of the Plan is built.

The following sections comprise the Future Land Use Element's data and analysis which includes an assessment of the population and land use data that summarizes the changes that have occurred in the City of Fernandina Beach (City) since the adoption of its last major Comprehensive Plan update in 2002. It also addresses employment factors and external economic factors that which currently drive the City's economic base or are likely to influence growth in the future. This assessment was created using the best available data from a variety of sources, including the Nassau County Growth Management Department, Nassau County Property Appraiser, the Northeast Florida Regional Council (NEFRC), the U.S. Census Bureau, the City's GIS mapping, and the University of Florida Bureau of Economic and Business Research (BEER).

## Background

The City is the official county seat of Nassau County (County). It is located on the northern end of a barrier island called Amelia Island and represents the northeastern edge of the County. Amelia Island is situated between the Amelia River to the west and the Atlantic Ocean to the east, with Duval County/ City of Jacksonville to the south and Camden County, Georgia to the north. The City has an extensive publicly acquired greenway system of over 300 acres, known as the Egans Creek Greenway, which lines the eastern interior border of the island, beginning at the southern edge of the existing City limits and ending at Fort Clinch State Park. The City's National Register historic downtown Central Business District lies along Centre Street, where buildings host a vibrant mix of retail, office, and residential uses. Surrounding streets support a less intensive mix of office and retail with the predominant land use being historic single-family homes in the downtown area. A strong civic presence is maintained downtown and includes City Hall, the County Courthouse, the Main Branch Library, and the United States Post Office.

Since the mid-1970's Fernandina Beach has witnessed its historically dynamic commercial fishing and shrimping industry dwindle. Despite this struggling economic sector, the City has maintained a heavy industrial presence along its waterfront area. The "Waterfront Area" is located along Front Street running perpendicular to the City's downtown on the Amelia River. David Yulee's 1853 rail line has continued to support two mills (Rayonier and Smurfit Stone) and a deep sea port. The economic viability of water-dependent commercial business, coupled with changing demographics, has forced a shift in the historical use patterns of this area.

Today, the waterfront area contains transitional commercial uses, a City marina, public boat ramp, and vacant or underutilized land. Each end of the waterfront area is anchored by heavy industrial uses and a rail line which splits Fernandina's downtown from its waterfront. The City has already taken steps to foster redevelopment through the creation of a Community Redevelopment Agency (CRA) comprised of 54 properties; thirteen of which are publicly owned. In 2005, the City became a designated Waterfronts Florida Partnership Community.

Beyond the downtown and waterfront area, the City's commercial activities are primarily located along three corridors: 8<sup>th</sup> Street (SR 200/ A1A), Sadler Road and 14<sup>th</sup> Street. These corridors consist of both light and medium intensity commercial land uses with several bordering areas offering mixed office and residential opportunities. Less intense commercial options are sprinkled throughout the City and provide retail and office locations bordering the City's residential areas.

## CHANGES IN LAND AREA

The City's current boundaries measure at 12.02 square miles representing 1.8% of Nassau County's land area of approximately 650 square miles. Between 2000 and 2010, the City has annexed 648 acres of land, increasing its incorporated area by just over one square mile. Most of the annexations were properties totaling less than ten acres. The largest annexation occurred in 2008 with the incorporation of roughly 415 acres of submerged lands added to create the City's mooring field, located in the Amelia River. The second major annexation furthered the City's conservation goals through the acquisition of several properties within the Egans Creek Greenway and bringing an additional 21 acres into its jurisdiction. Table LU-1 provides a list of the annexations in this time period.

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Table LU-1 Fernandina Beach Annexations, 2000-2010

Ordinance Number	Total Acreage	Owners	Address	Effective Date
2010-16	2.67	City of Fernandina Beach	2203 Ryan Road	10/19/2010
2009-13	0.492	Crawford, Richard A. and Kimberly	1220 South 14 <sup>th</sup> Street	9/1/2009
2008-18	3.49	Bosco Enterprises Inc.	1901 Island Walkway	9/2/2008
2007-30	9.52	McDonald, Wachovia Bank, etc.	8th Street properties	11/20/2007
2007-04	21.26		Egans Creek Greenway Project	2/6/2007
2007-05	415.0	State of Florida	Amelia River following Front Street	2/6/2007
2006-12	8.03	Association in Assisted Living, Inc.	1550 Nectarine Street	6/6/2006
2006-02	5.35	Werder, Duffy	Drury Road	2/7/2006
2005-34	2.0	Bailey Road Church of God	2920 Bailey Road	11/15/2005
2005-31	12.0	Amelia Park Development, LLP	1810 South 15th Street	10/18/2005
2005-06	1.3	Courson Development Corporation	879 Sadler Road	5/3/2005
2004-32	12.33	David and Ellen Edwards	Sadler Road west of Drury Road	10/19/2004
2004-25	15.24	First Baptist Church of Fernandina	South 8th Street between TJ Courson and Lime Streets	9/7/2004
2004-22	1.43	Mellany Rae and Doug Ray/ Amelia Wellness	Corner of Amelia Island Parkway and Amelia Road	9/21/2004
2004-18	8.17	JoAnn Kirkland, Thomas Crenshaw, Valencia Gower	3125 and 3127 Amelia Road	8/17/2004
2004-15	3.68	Marel Enterprises Limited	1458 Sadler Road	8/17/2004
2004-11	0.91	Amelia Service Center, Inc.	1610 South 8th Street	7/20/2004
2003-11	90	Pat Gilley, Albert Griner	Bailey Road and Amelia Island Parkway	4/15/2003
2002-39	8.56	Joseph Lee	North side of Sadler Road and East of Drury Road	1/21/2003
2001-10	0.45	Zona Humburg & Associates, Doris MCaninch	1420 Lime Street	5/1/2001
2000-38	10.35	Sixchins Investments, LLC	1699 South 14th Street	10/3/2000
2000-37	5.75		North side of Simmons Road	9/5/2000
2000-18	1.57		1900 block of S 14th Street	4/18/2000

## POPULATION GROWTH

Fernandina Beach has experienced fairly stable growth increases over the past 40 years. During the decade between 1960 -1970 the City's population dropped by roughly 300 people; this may be attributed in part to the September 1964 hurricane, Hurricane Dora. Dora, with 110 mph winds, severely damaged the City's waterfront and downtown CBD causing over \$3.1 billion (1995 USD) in damages to the Northeast Florida region (NOAA- American Meteorological Society). Another factor that may attribute to the decline in population through this period is college age population leaving the City to obtain advanced degrees. The City did recover from a 4% population decrease by 1980 and grew at a more rapid rate of roughly 20% in the two decades (1980-2000) that followed, respectively. Table LU-2 displays the population estimates and changes for the City for the decades between 1960 and 2010 and a nearly 60% population increase over the 60 year span.

TABLE LU-2 Fernandina Beach Census Counts 1960-2010

<b>Historical Census Count for the City of Fernandina Beach, FL 1960-2010</b>			
<b>YEAR</b>	<b>POPULATION ESTIMATE</b>	<b>NUMERICAL CHANGE</b>	<b>PERCENTAGE CHANGE</b>
1960	7,276		
1970	6,955	-321	-4.41%
1980	7,224	269	3.87%
1990	8,765	1,541	21.33%
2000	10,654	1,889	21.55%
2010	11,487	833	7.82%
<b>GROWTH 1960-2010</b>			<b>57.88%</b>

Source: Population Division, U.S. Census Bureau, 1960-2010

BEBR estimates the City's current population at 11,510 as of April 2011. As shown in Table 2-3, this estimate represents population increase of roughly 12.6% since 2000, when the US Census Bureau estimated the City's population to be 10,654. The 2010 US Census Bureau data estimated the City's population at 11,487, which reflects a decrease of 568 between the 2009 BEBR estimate. Both figures were factored into the analysis to reflect overall population changes since 2000. Further, the table describes the City's average growth rate of 1.4% annually.

TABLE LU-3 Fernandina Beach Population Change 2000-2011

<b>Population Change for the City of Fernandina Beach, FL 2000-2011</b>			
<b>YEAR</b>	<b>POPULATION ESTIMATE</b>	<b>NUMERICAL CHANGE</b>	<b>PERCENTAGE CHANGE</b>
2000*	10,654		
2001	10,984	330	3.10%
2002	11,122	138	1.26%
2003	11,172	50	0.45%
2004	11,290	118	1.06%
2005	11,316	26	0.23%
2006	11,354	38	0.34%
2007	11,543	189	1.66%
2008	11,998	455	3.94%
2009	12,055	57	0.48%
2010*	11,487	-568	-4.71%
2011	11,510	23	0.20%
<b>GROWTH 2000-2010</b>			<b>12.61%</b>
<b>AVERAGE ANNUAL GROWTH RATE 2000-2011</b>			<b>1.40%</b>

Source: Population Division, U.S. Census Bureau\* and B.E.B.R. 2011 Estimate

The City's population has a projected increase of 4.8% by 2015 to 12,824 from its 2009 population estimate and will continue climbing to almost 20%, equaling 14,404 people within the planning horizon of 2030. Using BEBR's

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mid-range projections it is estimated that the City can expect an average annual increase of 108 people. The City is likely to experience an estimated annual growth rate less than one percent (1%) through 2030. This projection describes a third less annual average population change from that experienced in the last eight years. The City will continue to grow; however, its growth will be a little slower than experienced in previous decades.

Table LU-4 Population Projection for Fernandina Beach 2009-2030

Population Projection for Fernandina Beach 2009-2030						
2009	2010	2015	2020	2025	2030	TOTAL CHANGE
12,209	12,331	12,824	13,337	13,523	14,010	14.75%
<b>AVERAGE ANNUAL GROWTH RATE: 0.86%</b>						
Source: BEBR, University of Florida, Population Projections, 2011						

Data obtained from the City’s utility providers and based on conversations with a couple of the Amelia Island resort communities (Amelia Island Plantation and Summer Beach) indicate that the City does not experience any major seasonal population fluctuations unlike communities in the South Florida region where there are strong “snow bird” season influences that impact their growth planning measures.

Nassau County, in its 2010 EAR based Comprehensive Plan Amendments data and analysis estimated its seasonal population. The City has used this same data to depict its seasonal population. In order to estimate the seasonal population, the permanent population estimates and projections for 2009-2030 were subject to a multiplier of 1.095 in order to obtain the maximum population projection for permanent and seasonal residents. This multiplier is based on analysis of information from the University of Florida’s Shimberg Center for Affordable Housing and the U.S. Census Bureau American Communities Survey (ACS) (2007) that found housing units for seasonal population presently account for approximately 9.5 percent of the County total housing inventory. Projected demand for additional seasonal housing units is based on the assumption of a similar 9.5 percent of the total housing units in the County being maintained for seasonal use. Thus, in order to estimate the seasonal population, it was assumed that permanent population estimates for 2010-2030 were subject to a multiplier of 1.095 in order to account for seasonal residents. Also, based on this data it was assumed that the majority of seasonal residents (82 percent) are residing in unincorporated areas of the County, with the remainder (18 percent) assigned to the City of Fernandina Beach. Seasonal population estimates are shown in Table LU-5 below.

Table LU-5 Seasonal Population Projection for Fernandina Beach 2009-2030

Fernandina Beach Seasonal Population Estimates & Projections 2009-2030						
	2009	2010	2015	2020	2025	2030
Permanent Population	12,209	12,331	12,824	13,337	13,523	14,010
Seasonal Population	1,145	1,160	1,198	1,239	1,285	1,331
Total Permanent. + Seasonal Populations	13,354	13,491	14,022	14,576	14,808	15,341
Source: Nassau County Growth Management Department based on University of Florida Shimberg Center for Affordable Housing						

Nassau County is expected to grow at a rate of just over 2% annually through 2030, more than twice as fast as the City’s projected annual growth rate of 0.86%. It is projected that the City’s population share of roughly 17% in 2009 will decline within the 2030 planning horizon to less than 14% of the County’s total population. Table LU-6 describes the City’s population share of the County as the two continue to grow through 2030.

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Table LU-6 Fernandina Beach Projected Population Share to Nassau County

FERNANDINA BEACH PROJECTED POPULATION SHARE OF NASSAU COUNTY, 2009-2030												
	2009	% of County	2010	% of County	2015	% of County	2020	% of County	2025	% of County	2030	% of County
Nassau County	72,567	16.6%	73,100	16.7%	80,000	15.8%	88,200	14.8%	96,100	14.1%	104,000	13.5%
Fernandina Beach	12,055		12,212		12,609		13,037		13,523		14,010	
<b>NASSAU COUNTY AVERAGE ANNUAL GROWTH RATE: 2.07%</b>												
<b>FERNANDINA BEACH AVERAGE ANNUAL GROWTH RATE: 0.86%</b>												
<b>AVERAGE SHARE OF COUNTY: 15.2%</b>												
Source: BEBR, POPULATION PROJECTIONS, 2011 and Nassau County Growth Management Department												

## LAND USE DISTRIBUTION WITHIN THE CITY

The City is comprised of 12 miles<sup>2</sup> and has twelve (12) land use categories which can be assigned to property within its municipal limits. Table LU-7 identifies the land use categories and provides details of the total amount of acreage assigned within each category. This table also identifies the “unclassified” properties within the City that have not been assigned a land use category as they are either City rights-of-way (ROW) or the newly created mooring field within the Amelia River. The Future Land Use Map Series contained as **Appendix A** reflects the future land use categories as assigned to properties in the City. There are no future land use map amendments contained as part of the EAR-based amendments.

LU-7 Fernandina Beach Future Land Use Categories

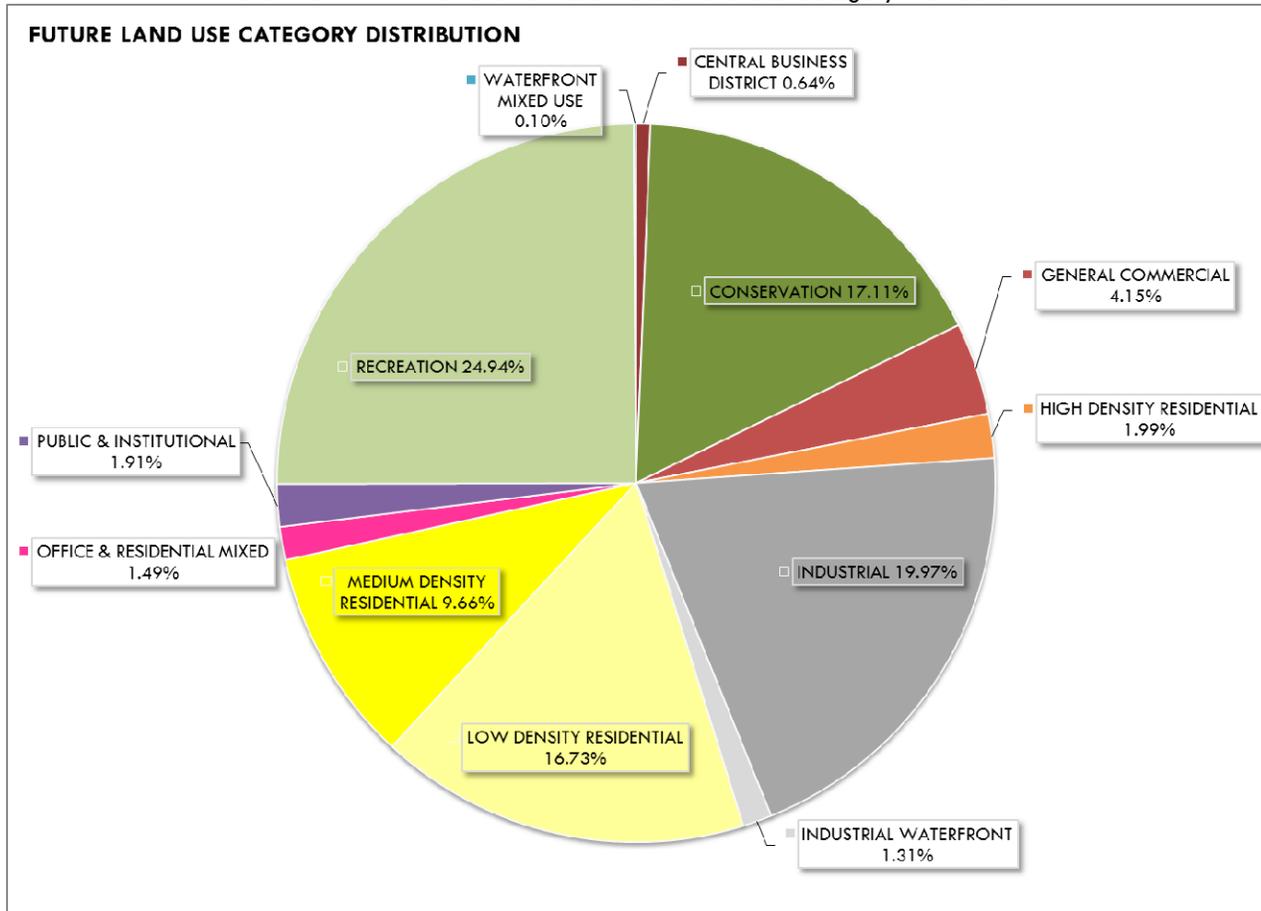
LANDUSE CATEGORY	ACREAGE	SQUARE MILES
CENTRAL BUSINESS DISTRICT	42.20	0.07
CONSERVATION	1,121.22	1.75
GENERAL COMMERCIAL	271.84	0.42
HIGH DENSITY RESIDENTIAL	130.43	0.20
INDUSTRIAL	1,308.79	2.04
INDUSTRIAL WATERFRONT	86.12	0.13
LOW DENSITY RESIDENTIAL	1,096.13	1.71
MEDIUM DENSITY RESIDENTIAL	633.22	0.99
OFFICE & RESIDENTIAL MIXED	97.45	0.15
PUBLIC & INSTITUTIONAL	125.43	0.20
RECREATION	1,634.21	2.55
UNCLASSIFIED- ROW/ MOORING FIELD	1,126.40	1.76
WATERFRONT MIXED USE	6.70	0.01
<b>TOTAL</b>	<b>7,680.14</b>	<b>12.00</b>

Source: City of Fernandina Beach, GIS

The City’s land use categories can be summarized into of six primary land use categories: Conservation/ Parks & Open Space, Residential, Commercial, Mixed Use, Institutional, and Industrial. Almost half (42%) of the City is held in conservation or recreational land use. The City’s available residential land makes up another 29%. Just over 21% of the City is held as industrial land and about 4% of the City is commercial. The remaining land use designations are mixed use districts comprised of both commercial and residential uses (CBD, ORMU, and WMU) and public/ institutional lands (PI); combined, these categories hold the remaining 4% of the City’s available land uses.

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Chart LU-1      Fernandina Beach Future Land Use Category Distribution



Source: Fernandina Beach Future Land Use Map, 2011

Residential land uses in Fernandina Beach vary from low densities of four units per acre to high density allowing up to a maximum of ten units per acre. Higher densities are found primarily along the North/South Fletcher Avenue (A1A) beach area and the City's historic "Old Town" area, where the City maintains the original 1811 Spanish plat. The City permits residential, office and retail mixed uses in its Central Business District (CBD), Office & Residential Mixed Use (ORMU), and Waterfront Mixed Use (WMU) future land use categories. Commercial uses within the City are clustered around the dominant commercial "corridors," located along the major roadways of A1A/S.R.200/ 8<sup>th</sup> Street, 14<sup>th</sup> Street and Sadler Road. Only a few commercial land use designations are found along the Fletcher Avenue/ A1A corridor.

Industrial (I) and Industrial Waterfront (IW) land use categories surround the City's National Register designated historic downtown Central Business District area. Smurfit Stone and Rayonier pulp/paper mill factories are located on the north and south ends of downtown. Front Street historically held industrial waterfront related uses such as shrimp docks, processing plants and marinas. Today, the Front Street area is within the City's Community Redevelopment Area (CRA) and most of these small IW properties are eligible to apply for a Waterfront Mixed Use land use designation that provides the opportunity to have both commercial/waterfront industrial and low density residential uses. The area surrounding the City's Airport is the other area allocated for industrial land uses.

The City's Future Land Use Map (FLUM) has been amended 42 times since the 2002 Comprehensive Plan update. **Appendix B** provides a complete list detailing all FLUM amendments from 2005 through 2011. The FLUM was amended ten (10) times due to "decade's old scrivener's errors" to fix previous mapping impracticalities and seven (7) amendments were part of City annexations requiring an assignment of a future land use category. An additional seven (7) changes were brought forward due to the establishment of the City's Community Redevelopment Area (CRA), once industrial waterfront lots are now either part of the Central Business District or have taken advantage of the recently created "Waterfront Mixed Use" land use category. Two (2) changes placed properties in the Office &

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Residential Mixed Use category from Medium Density Residential. Two (2) amendments were from Medium to High Density Residential. One (1) property changed from General Commercial to High Density Residential while another one (1) went from Medium Density Residential to General Commercial.

In 2000, the City recognized the need to enhance protection of the Egans Creek Greenway. The Greenway is partially salt water marsh and partially fresh-water marsh which runs through the middle of Amelia Island. Through a bond referendum the City was able to acquire many of the environmentally sensitive properties bordering the Greenway. The City purchased several parcels totaling 12.37 acres and placed it under Conservation Land Use. In 2010, the City noted several additional scrivener's errors within several of its existing recreational facilities and took action to remedy those errors by placing them under the Recreational Land Use category. These corrections brought an additional 16.71 acres of land under Recreation Land Use.

In summary, over the past five years, there were 87.85 acres of involved in land use category changes. Of that total 33% of the changes were related to the City's efforts to protect and enhance the Egans Creek Greenway. With the exception of several scrivener's errors related to digitizing the map itself, the FLUM seems to be functioning quite well. In the future, the City should anticipate witnessing additional land use changes within its CRA as these property owners will likely take advantage of the categories that afford them mixed use residential density options.

### **VACANT AND DEVELOPABLE LAND**

According to the Nassau County Property Appraiser's Office, approximately 856.46 acres within City limits are classified as vacant. Table LU-7 describes the City's generalized existing land uses while tables LU-8 and LU-9 describe the amount of vacant land within each of the Future Land Use categories. Vacant lands were determined using the Nassau County Property Appraiser property use description codes. Developable lands were calculated within each of the Future Land Use categories. The appropriate density or intensity rates were applied to provide an estimated development potential within each category. This analysis does not account for wetlands or other environmental constraints that may be present on individual properties. With less than 6% vacant land available; the City is nearing build-out within its existing municipal limits. This figure further supports the City's intent to provide for infill and redevelopment opportunities that incentivize low impact development strategies and green building techniques.

Table LU-8 and Chart LU-2 describe the City's existing land use consumption acreage. This data was generated using the Nassau County Property appraiser data use description codes and aggregated (as appropriate) to provide generalized land use categories. Over one-third of the City's existing development has been categorized as residential. Another third of the City is held in public/institutional holdings including such uses as schools, parks and open space, beach access locations, the airport, marina and golf course. Eleven percent of the land is described as waste, miscellaneous or unknown. These descriptions tend to be acres that are "not developable" or held under common ownership by local home owners associations. Nearly 6% of the land is classified as vacant and developable to accommodate future population needs. Just over 4% of the land is described as industrial with just under 4% carrying commercial uses. Less than 1% of existing land is utilized for non-profit, community or church uses.

Table LU-8      Fernandina Beach Existing Uses (Aggregated)

NC PROPERTY APPRAISER AGGREGATED USES	TOTAL ACREAGE	% OF TOTAL
NON-PROFIT/ CHURCH	140.68	0.91%
COMMERCIAL	588.92	3.82%
INDUSTRIAL	633.06	4.11%
VACANT	856.46	5.56%
WASTE/MISC/ UNKNOWN	1751.97	11.37%
PUBLIC	5664.02	36.74%
RESIDENTIAL	5779.46	37.49%
<b>TOTAL</b>	<b>15414.58</b>	<b>100.00%</b>

Source: Nassau County Property Appraiser

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Chart LU-2 Fernandina Beach Existing Uses

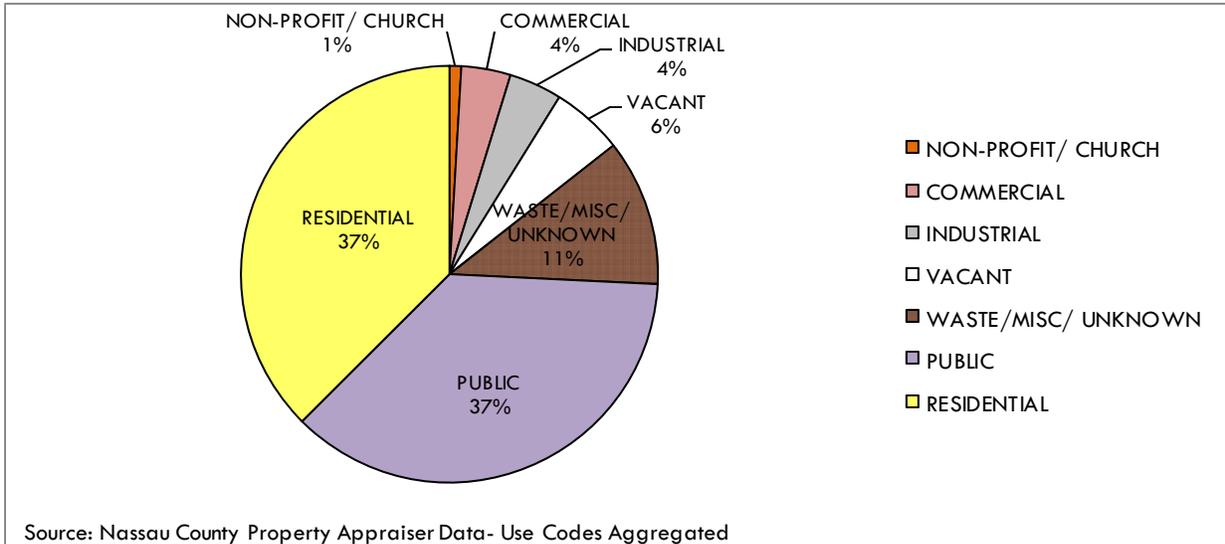


Table LU-9 describes how many units the City’s available residential vacant acreage could generate at its existing allowable densities. Vacant residential lands total about 413 acres and could generate just over 2,600 dwelling units if built to its maximum potential. The City’s population is expected to increase by roughly 2,500 people in the next 19 years. With an average household size of 2.30 people per unit (2010 Census), the City has more than double the necessary capacity depicted on its Future Land Use Map to provide housing for its future population.

Table LU-9 Development Potential on Vacant Residential Land

Residential Vacant Lands Analysis			
FUTURE LAND USE CATEGORY	CALCULATED ACREAGE OF VACANT LAND	DENISTY (units/acre)	POTENITAL UNITS
LOW DENSITY RESIDENTIAL	179.79	4	719.16
MEDIUM DENSITY RESIDENTIAL	157.76	8	1,262.08
HIGH DENSITY RESIDENTIAL	22.71	10	227.1
CENTRAL BUSINESS DISTRICT	3.41	8	27.28
OFFICE RESIDENTIAL MIXED USE	49.12	8	392.96
WATERFRONT MIXED USE	0	2	0
<b>TOTAL</b>			<b>2,628.58</b>

Source: Fernandina Beach FLUM and Nassau County Property Appraiser Data

Table LU-10 describes the amount of available commercial and industrial lands as depicted on the City’s Future Land Use Map. The vacant commercial and industrial acreage totals less than 435 acres. However, this figure may be slightly inflated in its industrial land use calculation due to the fact that portions of the City’s municipal airport properties which are classified as vacant lands by the Nassau County Property Appraiser’s Office. Its classification as such somewhat skews the amount of acreage that is actually “developable.” Additionally, there are parcels owned by Smurfitt-Stone and Rayonier, the City’s major manufacturing employers, which have likely been separated from their overall property holdings to better depict their “vacant and undevelopable” land allowing them some tax burden relief. Portions of both of their property holdings can be described as undevelopable due to the large amount of wetlands contained on those pieces of property, most of which has been assigned a Conservation future land use category. Table LU-10 does not reflect these assumptions in its analysis and describes the figures as reported by the Nassau County Property Appraiser’s Office.

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The proposed EAR-based Comprehensive Plan Amendments consider several changes to its commercial and industrial land use categories. Its General Commercial category reflects an intensity increase in FAR from 0.5 to 1.5 and its Office and Residential Mixed Use category proposes an intensity increase in FAR from 0.5 to 1.0. Both of these proposed changes will serve to support the City's desire to obtain a more compact urban development form and as an incentive for green building and low impact development techniques. The Industrial category also reflects an increased intensity in FAR from 0.5 to 0.75. The resulting FAR is consistent with the permissible FAR in the City's Industrial Waterfront category and reflects the actual industrial building patter which exists in the City today. As discussed in the Public Facilities and Services data and analysis, the City has more than adequate infrastructure in place to support the increased intensities proposed by this amendment package as well as its anticipated population increase through 2030.

Table LU-10 Development Potential on Vacant Commercial and Industrial Land

<b>Commercial and Industrial Vacant Lands Analysis</b>							
FUTURE LAND USE CATEGORY	CALCULATED ACREAGE OF VACANT LAND	VACANT ACREAGE TO SQ FT	INTENSITY (Floor Area Ratio)- Current	POTENTIAL SQ FT- Current	INTENSITY (Floor Area Ratio)- Proposed	POTENTIAL SQ FT- Proposed	SQ FT INCREASED BY PROPOSED AMENDMENTS
GENERAL COMMERCIAL	41.53	1,809,047	0.5	904,523	1.5	1,206,031	301,508
MIXED USE	49.12	2,139,667	0.5	1,069,834	1	2,139,667	1,069,833
CENTRAL BUSINESS DISTRICT	3.41	148,540	2	297,079	SAME	SAME	SAME
WATERFRONT MIXED USE	0	0	0.75	0	SAME	SAME	SAME
INDUSTRIAL	324.69	14,143,496	0.5	7,071,748	0.75	18,857,995	11,786,247
INDUSTRIAL WATERFRONT	15.73	685,199	0.75	513,899	SAME	SAME	SAME

*Source: Fernandina Beach FLUM and Nassau County Property Appraiser Data*

## DEMOGRAPHIC PROFILE

The City of Fernandina Beach demographic profile comparison based on 2000 and 2010 US Bureau Census data is summarized in Table LU-11. In 2010, City's household size is nearly 12% less than the national average (2.6) and its population is about seven (7) years older than the US average age (36.5). Not unlike other Florida cities, Fernandina Beach tends to have an older population with roughly 7.5% more people aged 65 and over compared to the national average of 12.6%. Its population tends to be wealthier than the national average with individual(s) and family incomes ranging between \$2,500 to \$3,200 higher but, is on par with the US estimates of roughly 10% of individual(s) and families living below the poverty level. The City's home ownership rates also on average with the national average. On average the mean travel time to work is less than 2 minutes different than the national average of 25.2 minutes.

There are several noteworthy changes that took place between the years 2000 and 2010. The City has attained an increase in its high school degree achievement with 89.8% of its population, nearly 5% higher than the national average. There has been a 4% decline in the number of civilian veterans within the City however; this figure remains nearly 7% higher than the national average. While the percentage of those who speak a language other than English in their home has increased, the City remains well below the national average (19.6%) in this social characteristic. In terms of race, over two-thirds (2/3) of the City is white, roughly the same as the national average, and although its African American population has decreased over the past 10 years, its average exceeds the national average by 3.5%. One of the more drastic changes the City experienced over the past decade was 129% increase in the median value of its single family homes. The City's single family home values are almost 70% higher than the national average.

Table LU-11 2000 and 2010 US Census Demographics Snapshot

<b>Fernandina Beach Demographics 2000 and 2010</b>			
	<b>2000</b>	<b>2010</b>	<b>Change</b>
<b>Social Characteristics</b>			
Average Household Size	2.28	2.3	0.02
Median Age (years)	43	43.1	0.1
Male	47.7%	48.9%	1%
Female	52.3%	51.1%	-1%
Under 5 years old	5%	6%	1%
65 years and over	12%	20%	8%
High School Degree	87.1%	89.8%	3%
Bachelor's Degree of higher	32.4%	32.2%	-0.2%
Civilian Veterans	19.8%	15.7%	-4.1%
Speaks a language other than English at home	6%	11%	5%
<b>Race</b>			
White	81.5%	77.3%	-4.2%
African American	16.2%	15.9%	-0.3%
Other	2.3%	6.8%	4.5%
<b>Economic Characteristics</b>			
Per Capita Income (1999 \$/ 2009 \$- adjusted for inflation)	\$24,517	\$30,236	\$5,719
Median Household Income	\$40,893	\$53,945	\$13,052
Average Family Size (people)	2.78	2.81	0.03
Median Family Income (1999 \$/ 2009 \$- adjusted for inflation)	\$54,806	\$64,946	\$10,140
Individuals below Poverty Level	10.2%	13.2%	3%
<b>Housing Characteristics</b>			
Median Value of Single Family Homes	\$134,500	\$308,000	\$173,500
Owner Occupied Housing Units	3,118	3,198	80
Renter Occupied Housing Units	1,407	1,601	194
Vacant Housing Units	1,063	1,820	757
Mean Travel Time to Work (in minutes)	22.6	23.9	1.3

Source: 2000 and 2010 US Census Bureau Data, American Community Survey

## EMPLOYMENT

Fernandina Beach is located about 35 miles from downtown Jacksonville on Amelia Island, roughly half an hour from Jacksonville International Airport. The City is served by two major railways (First Coast Rail and CSX) and is home to a natural deepwater port. Fernandina Beach provides a unique combination of pristine beaches and a small-town atmosphere. The City's economy is diverse, ranging from tourism based employment to pulp and paper mill industries to charter fishing and shrimping. The Port of Fernandina, operated by the Nassau County Ocean Highway and Port Authority, continues to play a crucial role in future economic development. The significance of its role has been recognized by its inclusion in the Florida Strategic Intermodal System (SIS) Plan of the Florida Department of Transportation (FDOT). The Fernandina Beach Airport, located on 602 acres and operated by the City, has general aviation and transport facilities. Sufficient land is owned by the airport to provide for future growth and expansion needs for both airport operations and commercial businesses.

## FUTURE LAND USE

In June 2008, the Hass Center for Business Research and Economic Development completed a report on the economic impact of Amelia Island tourism on Nassau County for the Amelia Island Tourism and Development Council. The report finds that tourism on Amelia Island:

- “generates ~\$346 million in total sales (retail plus business-to-business) locally;
- results in the creation of about 4,781 jobs that are directly or indirectly related to tourism and
- creates local income and wages of ~ \$94 million.”

The accommodation, food service and retail industries (visitors and hospitality sectors) employ the largest share of Fernandina Beach’s workforce making up over 35% of its economic base. The County’s economy is twice as dependent on tourism as the average Florida County, according to Florida Legislative Research. Government operations (City and County operations, Nassau County School Board, Department of Health, US Post Office, and Florida Park Service) make up roughly 16% of Amelia Island’s economic base. Manufacturing makes up another 14% of its economic base (Rayonier and Smurfit Stone pulp mills.) Table LU-12 identifies the City’s major employers.

Table LU- 12 Major Employers in Fernandina Beach

Employer	Industry	# of Employees
Smurfit-Stone	Industry	445
Baptist Medical Center- Nassau	Healthcare	413
Nassau County School Board	Education	360
Rayonier	Manufacturing	280
Fernandina Beach	Government	278
Wal-Mart	Retail	200

Source: Nassau County Economic Development Board, Fernandina Beach, Nassau County School Board

The Nassau County Economic Development Board (NCEDB) has identified eight target industry clusters that are the focus of economic development efforts. The targeted industries are: Aviation-Aerospace, Corporate Headquarters, Pharmaceuticals and Biotechnology, Electronics and Semiconductors, Medical Equipment and Technologies, Customer Service and Technical Support Centers, Internet Technology, and Motor Vehicle Parts and Accessories.

Nassau County completed its EAR report in July 2008. Their community assessment analyzed both vacant and agricultural lands as “developable” and found that the County on whole had a surplus development potential of 65,365 dwelling units to accommodate its 2030 housing estimates. At this time the County has reviewed and approved for development totaling roughly 5,100 dwelling units.

## EXTERNAL ECONOMIC FORCES

Several external factors also affect economic and land development within Nassau County and Fernandina Beach. Improvements in the Jacksonville port facilities and new developments will generate more jobs for the northeast Florida region. These new jobs and residents are likely to bring their families and friends to Fernandina Beach whether it is to live, work or play.

The Jacksonville Port Authority, known as JAXPORT, is an international trade seaport. JAXPORT expansion plans include improvements to its three marine terminals (Talleyrand, Blount Island and Dames Point). Additional improvements will be completed to the Jacksonville harbor. At the Dames Point terminal, JAXPORT recently completed construction of a 158 acre container handling facility. This facility will be used by the Tokyo based shipping line known as Mitsui O.S.K. Lines (MOL), and terminal operating partner, TraPac, to unload and load container ships sailing to and from Asia.

MOL’s operations are estimated to create more than 1,600 new private sector port jobs in the greater Jacksonville area, while supporting operations in trucking, distribution and related services could generate a total of 6,000 direct and indirect local jobs throughout the northeast Florida region. Jacksonville’s new port facilities will enable northeast Florida businesses to export directly to nations throughout Asia- opening a huge new consumer market and providing an opportunity to boost sales. This, along with planned expansions of the Panama Canal to be completed by 2014, will make northeast Florida more attractive for a host of businesses to grow operations in the region by enabling local companies to easily import and export goods with Asia.

## FUTURE LAND USE

These advantages will create new opportunities in manufacturing, distribution and warehousing all linked to trade with these new markets. For example, home improvement and department stores may now look to open distribution centers in northeast Florida because these facilities will provide them with a direct local link to their Asian suppliers. Similarly, manufacturing plants which rely on parts or materials from Asia may consider northeast Florida for their operations because they now have a direct link to their Asian suppliers.

Jacksonville- based CSX railroad company, plans new expenditures totaling \$40 million to upgrade its tracks and build a link through Nassau County to connect the rails along U.S. 17 to the main line running north toward Waycross, GA. JAXPORT projections call for a tripling of cargo in the next few years largely because of the new MOL terminal and a pending agreements with the Korean shipping company, Hajin. The rail connections will enable the ship to move their cargo from on- shore and provide an enhanced distribution network of these goods.

Located 17 miles west of downtown Jacksonville and approximately 40 miles from Amelia Island, the proposed Cecil Field Commerce Center will provide 8,300 acres of new and existing commerce facilities. The City of Jacksonville has spent over \$180 million for infrastructure improvements to enhance the area and attract businesses to locate at Cecil Field. The area's current master plan provides over 30 million square feet of warehouse/distribution space; 727,000 square feet of retail space; 320,000 square feet of office space; and a 660 room hotel location.

The Kings Bay Naval Submarine Base is located in Camden County, Georgia, near the Florida-Georgia border adjacent to the City and about a 35 mile car ride. The Villages of Kingsland is a planned development on 15,000 acres recently annexed into the City of Kingsland in Camden County, Georgia, west of U.S. 17 and north of SR 40. On the 15,000 acres, of which approximately one-third is wetlands, the developer has plans to build approximately 40,000 residential units, 13.5 million square feet of industrial development, and 9.5 million square feet for commercial use.

The Timucuan DRI (Development of Regional Impact) is a 6,095-acre mixed-use development of regional impact in northern Duval County, west of Interstate 95 and east of U.S. 1. The DRI is approximately 30 miles from Fernandina Beach. It was proposed in 2006 and will be developed with an estimated 10,297 residential units, 803,000 square feet of commercial space, and 200,000 square feet of office space.

In adjacent Baker County, proposed large-scale developments are changing the rural character of this area. Located about 65 miles from Fernandina Beach, currently under review are the 3,200-acre Cedar Creek project with 7,000 homes and 425,000 square feet of commercial use; and Navona Creek, a 3,654-acre development with 8,300 homes, a 1.5-million square feet business park, and a 330,000 square feet village center. It is estimated that these new developments will triple the Baker County population.

These new developments are likely to generate additional spending on Amelia Island as the area continues to be recognized for its beautiful white sandy beaches, unique shopping opportunities and fine dining experiences. New residents and their visitors may travel from their home locations to hike, bike and explore the City's vast natural resources.