

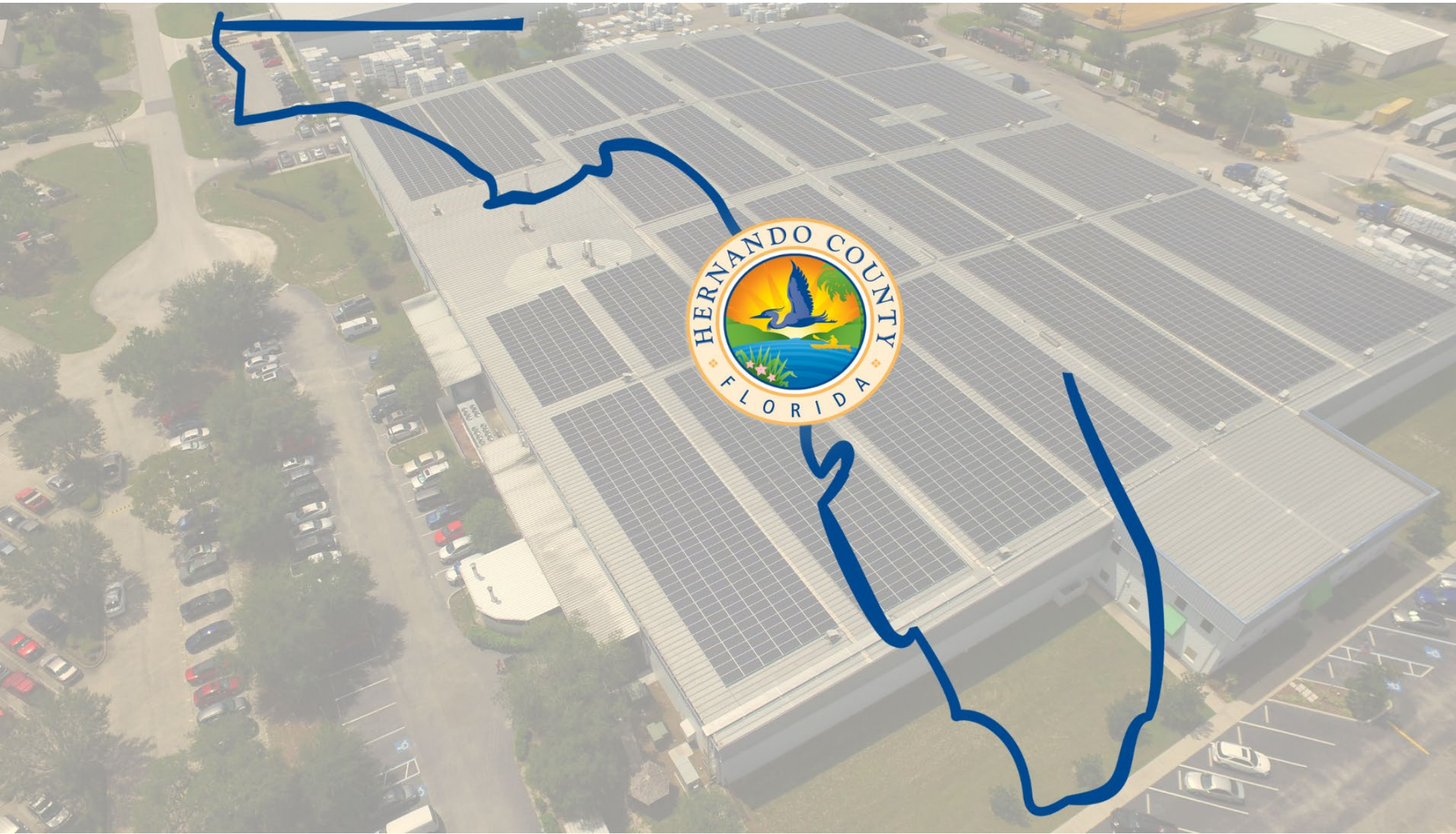
# An Industrial Land Strategy for Hernando County

Presentation Draft: May 24, 2024

Prepared for Hernando County by the Tampa Bay Regional Planning Council



**TBRPC**  
TAMPA BAY REGIONAL  
PLANNING COUNCIL







An aerospace manufacturing technician at work in Hernando County; source: Hernando County Office of Economic Development.

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## About the Tampa Bay Regional Planning Council

Since its founding in 1962, the Tampa Bay Regional Planning Council (TBRPC) has convened local governments and gubernatorial appointees to coordinate planning for the region's future. The TBRPC provides a forum for analyzing issues, resolving problems, and sharing solutions among the jurisdictions in Citrus, Hernando, Hillsborough, Manatee, Pasco, and Pinellas Counties.

In 2003, the TBRPC was designated by the U.S. Economic Development Administration as the Economic Development District for the Tampa Bay region. The TBRPC provides a conduit for accessing matching federal economic development funds for job-creating projects, offers technical services to assist governments create and implement effective economic development strategies, and assists governments identify and access economic resilience and disaster recovery funding. TBRPC staff also maintain the Tampa Bay Comprehensive Economic Development Strategy, a strategy-driven plan for regional economic development that provides a coordinating mechanism for individuals, organizations, local governments, and private industry to engage in a meaningful conversation and debate about the economic direction of the region.

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## Executive Summary

Many communities throughout the United States are facing the complex land use issues posed by a post-industrial economy, such as the best use of underutilized industrial land. For some communities, industrial land represents a legacy ripe for redevelopment. Others see industrial land as an opportunity to continue to foster new jobs and diversify the local tax base, and thus apply regulations, incentives, and even penalties to maintain the industrial land base against pressures to convert that land to other uses. As Hernando County's population growth rate continues to climb, its county leaders emphasize the importance of strategic growth management to ensure that development is directed towards suitable areas and land is allocated for its most beneficial use.

The future job growth potential of Hernando County may diminish if future land use amendments redesignate industrial land to non-employment uses. While job growth is potentially unlimited, suitable land for those jobs is limited. How much future growth is diminished is an open-ended question about a limited resource, especially as new residential uses crowd-out potential job growth in desirable locations. As such, setting planning horizons and benchmarks can offer guidance on how much of a limited resource is required within a given timeframe.

At the request of the Hernando County Office of Economic Development, the Tampa Bay Regional Planning Council has prepared a study of county industrial land and strategies to support future employment growth. The study includes an analysis of the County's current industrial landscape and explores opportunities for the long-term preservation of industrial lands.

### Key Findings:

1. Hernando County's economic development trends, most notably its proximity to major transportation routes and growing population, as well as its availability of developable lands contribute to its appeal for industrial growth and economic development.
2. To achieve a balanced jobs-to-employed residents' ratio by 2050, the County should add about 34,436 new jobs, with a goal to have approximately 10% of those new jobs associated with target industry employers.
3. 6,845 acres of priority lands were identified across five designated areas of interest (AOIs); delineated areas that are appropriate for further analysis as potential future industrial sanctuaries. 1,433 acres within AOs are already designated as industrial, of which 177 acres are vacant. Additionally, 1,119 acres of other vacant lands were identified (vacant commercial, governmental, institutional, and residential lands). TBRPC staff do not suggest that all the land within the AOs become part of an industrial sanctuary; instead TBRPC recommends that these areas be considered as a starting point for stakeholder engagement and continued analysis.
4. A strategy for the conservation of industrial lands is needed to enhance the County's ability to maintain a balance between providing sufficient land for quality employment opportunities and housing to accommodate its expanding population. TBRPC staff recommend the County consider the implementation framework outlined below and described in detail in Chapter 3.





Hernando County has a significant manufacturing presence including aerospace supply, electronics, plastic injection molding and machine shops.  
Source: Spartronics Manufacturing.



## 1. Introduction to Hernando County's Economic Landscape

Located along Florida's Gulf Coast, Hernando County extends 37 miles inland positioning itself at the geographic center of the state. Brooksville, the county seat, lies approximately 50 miles north of Tampa and 80 miles west of Orlando. Including Brooksville, Weeki Wachee, and expansive unincorporated areas like Spring Hill, the County covers 504 square miles of diverse landscapes and communities.

The County's economic landscape is deeply rooted in its agricultural heritage, with citrus groves, cattle ranching, and timber operations historically driving its economy, like many other rural counties in the state. The post-World War II era marked a significant turning point, as Florida witnessed a population and development surge leading to substantial enhancements in transportation infrastructure. Prominent truck routes, including Interstate 75, U.S. Route 19, State Road 50 to the Florida Turnpike and later, the Suncoast Parkway, as well as CSX railway lines with direct connections to the Port of Tampa Bay, improved the County's access to domestic markets across North America. This connectivity spurred growth in healthcare, trade, manufacturing, logistics, and distribution. From 2001-2022, Hernando County saw a 51% increase in new job creation, signaling a robustly expanding economy.<sup>1</sup>

Further diversifying its economic base, Hernando County has leveraged its natural beauty, with landmarks like Weeki Wachee Springs, to attract new residents and visitors alike. This strategy has increased tourism and residential development, earning the County the nickname "Florida's Adventure Coast." Between 2021 to 2022, the County's population increased by 3.1%, surpassing Florida's overall growth rate of 1.9% during the same timeframe.<sup>2</sup>

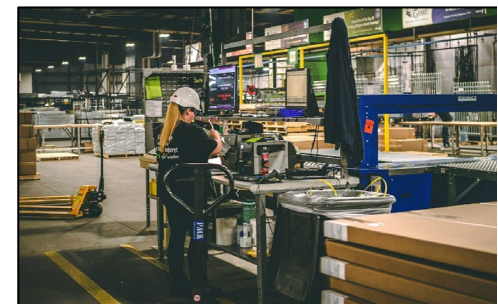
Today, Hernando County is witnessing a shift towards modern industries such as technology, aerospace aviation, healthcare, education, and professional services. As new products and production undergo digital transformation, many of the most competitive U.S. industries, including aircraft, machinery, and medical device manufacturing, which are vital to key Florida sectors, are evolving into high-wage jobs that require a highly skilled workforce.



Agricultural land in Hernando County; source: Tampa Bay Times.



Roadwork on State Road 50; source: Tampa Bay Times.

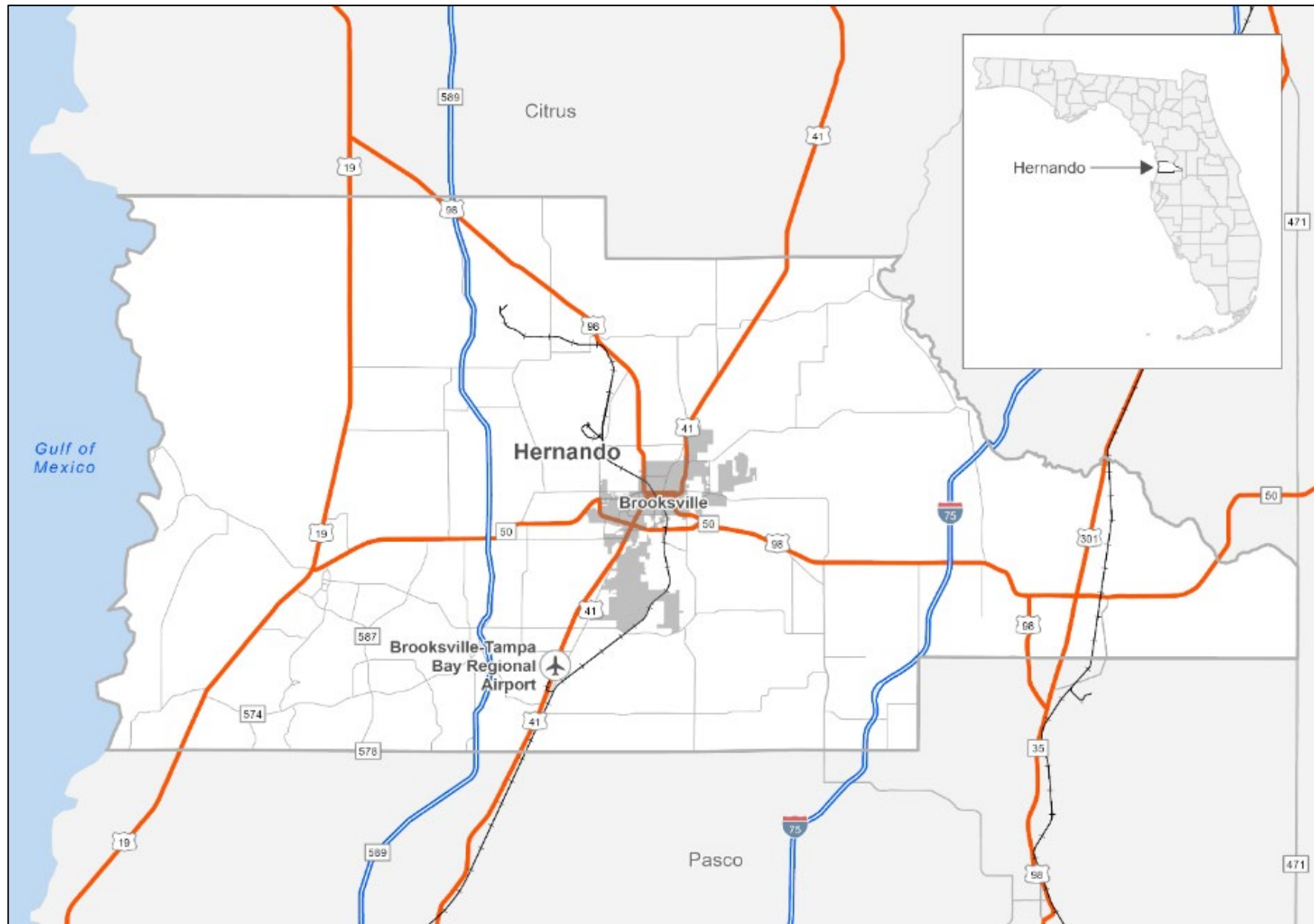


A thriving workforce lives and learns in Hernando County; source: Hernando County Office of Economic Development.

<sup>1</sup> TBRPC's REMI PI+ v3.0 Model of Tampa Bay Counties.

<sup>2</sup> United States Census Bureau.

FIGURE 1. HERNANDO COUNTY TRANSPORTATION NETWORK



Source: Hernando County GIS, 2023. Map by TBRPC.

## 1.1 Analysis of Economic Development Trends

Hernando County's local economy is shaped by a combination of factors, including demographics, employment and educational opportunities, and housing affordability, among others. In this chapter, TBRPC staff provide an overview of the economic trends identified, serving as context for the proposed industrial land use strategy and the policy recommendations presented in the concluding chapter.

### Population Growth and Density

Hernando County's population was estimated to be 205,820 in 2022, with a density of 409 individuals per square mile.<sup>3</sup> As shown in Table 1, between 2021 to 2022, the County's population increased by 1.5%, matching Florida's overall growth rate of 1.5% during the same timeframe. On a five-year timescale, however, Hernando has grown by 10.1% compared to 7% at the state level. This growth highlights the County's attractiveness and its role in contributing to the state's reputation as one of the fastest growing in the U.S. This rapid growth can be attributed to factors such as affordable housing, quality of life, and possibly the migration of individuals seeking employment opportunities or retirement options within the County.

Projections for the County anticipate a 26% increase in population by 2050,<sup>4</sup> which underscores the need for long-term strategic planning in Hernando County. To support a growing population, significant investments in infrastructure (such as roads, public transportation, utilities) and public services (including schools, healthcare, and emergency services) will be essential. Planning for this growth proactively can help mitigate potential negative impacts on traffic congestion, public service delivery, and environmental resources.

The County's density, while not extremely high, does indicate a certain level of urbanization that requires thoughtful planning to accommodate growth sustainably. Currently, urban density is pronounced in clusters of residential buildings and commercial establishments along major transportation routes, particularly U.S. 19, U.S. 41, and State Road 50. Conversely, rural areas, typified by expansive farmland and scattered residential communities, maintain a lower population density, reflecting more extensive land use for agricultural and pastoral purposes across the County. This aligns with population density trends in urban and rural areas which are closely tied to the availability and quality of infrastructure, with urban centers exhibiting higher densities supported by comprehensive transportation networks, utilities, and amenities. Overall, Hernando County is relatively rural in comparison to other counties in the Tampa Bay region. As the population grows, issues such as infrastructure development, transportation planning, and public services expansion become increasingly important to address.

TABLE 1. 2022 REGIONAL POPULATION GROWTH COMPARISON BY COUNTY

Area	Population	1-Year Growth	5-Year Growth
Citrus	156,342	0.9%	7.4%
<i>Hernando</i>	<i>205,820</i>	<i>1.5%</i>	<i>10.1%</i>
Hillsborough	1,529,249	1.7%	8.8%
Manatee	430,946	2.2%	11.8%
Pasco	599,501	2.3%	14.1%
Pinellas	989,971	0.8%	2.2%
Florida	22,451,577	1.5%	7.0%

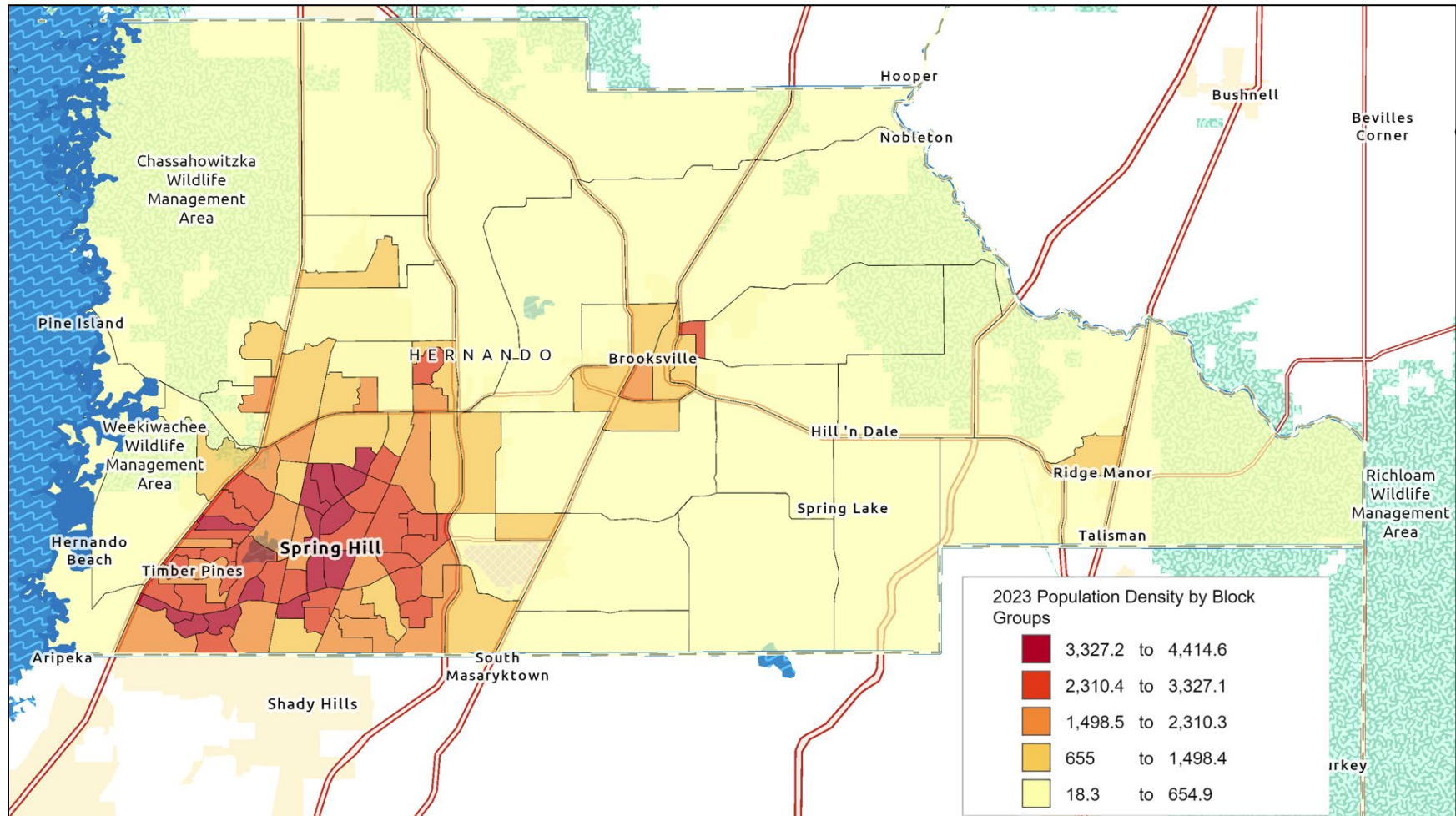
Source: REMI PI+ V 3.1 Tampa Area 7 Region 70 Sector Model, 2022.

<sup>3</sup> United States Census Bureau, "U.S. Census Bureau QuickFacts.", TBRPC Calculations.

<sup>4</sup> United States Census Bureau, REMI Projections to 2050.



FIGURE 2. HERNANDO COUNTY'S 2023 POPULATION DENSITY BY BLOCK GROUP



Source: ESRI Business Analyst Population Density Color-Coded Map 2023, Hernando County.



## Age Distribution

Alongside these population growth trends, there are workforce challenges to consider regarding the aging population in Hernando County. As of 2022, 41.3% of its residents were over the age of 55, and 27.8% were over the age of 65. Compared to national age distributions, Hernando County has a higher representation of individuals over 50, particularly in the 70–85+ age bracket. This aging trend is consistent across the U.S. but is particularly significant in coastal Florida counties like Citrus, Sarasota, Charlotte, and Hernando, where the median age is increasing annually.<sup>7</sup>

The aging population in Hernando County poses challenges for the working-age population, who are responsible for sustaining the tax base for services, especially as many retirees live on fixed incomes. Moreover, as employees retire and leave the workforce, Hernando County may have difficulty filling jobs without relying on commuters into the County, impacting the local economy and service provision.



Hernando County is home to the largest (truck-to-truck) Wal-Mart Distribution Center in the U.S. Source: Hernando County Office of Economic Development.



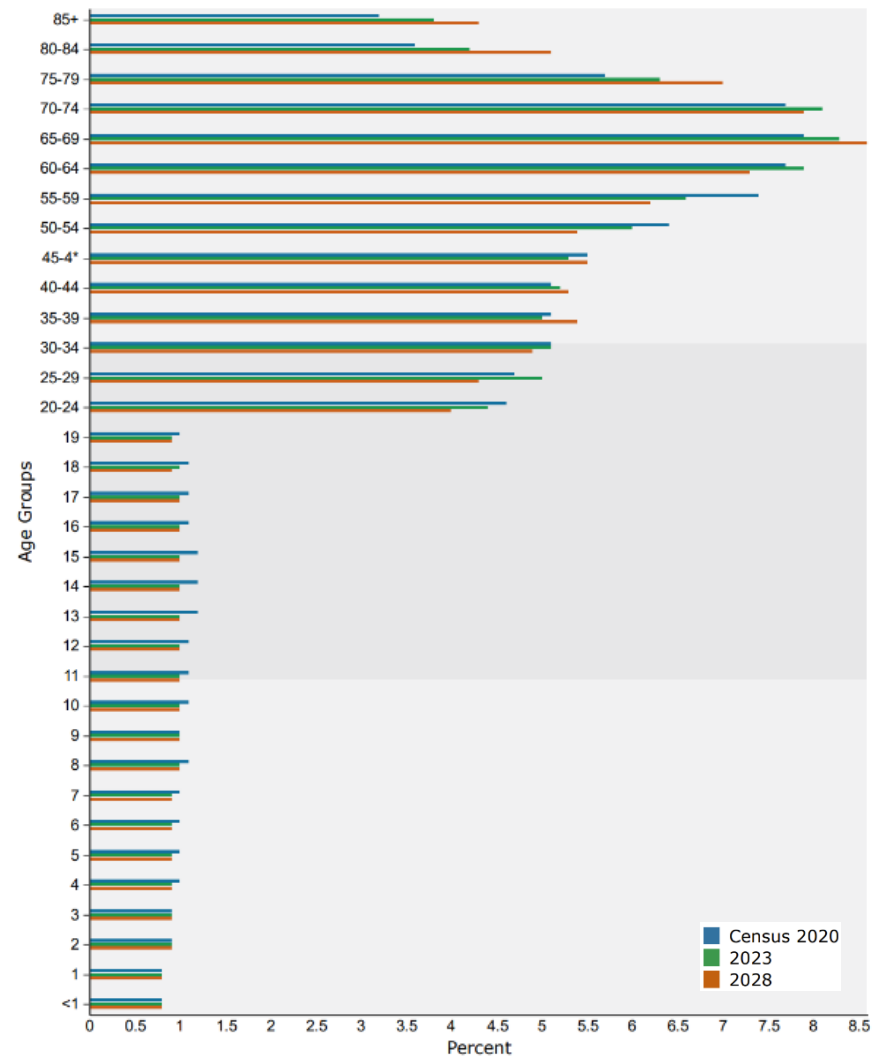
Centrally located near numerous routes and modes of transportation, Hernando County is well-positioned to support business distribution and logistics. Source: Hernando County Office of Economic Development.

TABLE 2. HERNANDO COUNTY AGE GROUPS (2022)

Age Groups	Population	Ratio Compared to National Average
All	205,820	1
Ages 85+	6,356	1.56
Ages 80-84	7,807	1.82
Ages 75-79	12,345	1.79
Ages 70-74	14,677	1.55
Ages 65-69	15,974	1.38
Ages 60-64	14,485	1.11
Ages 55-59	13,306	1.04
Ages 50-54	12,610	0.99
Ages 45-49	10,645	0.89
Ages 40-44	11,156	0.85
Ages 35-39	11,107	0.81
Ages 30-34	12,041	0.82
Ages 25-29	11,400	0.81
Ages 20-24	10,546	0.78
Ages 15-19	11,099	0.85
Ages 10-14	10,912	0.86
Ages 5-9	10,347	0.83
Ages 0-4	9,007	0.77

Sources: Left: REMI PI+ v3.0 Model of Tampa Bay Counties, TBRPC Calculations. Right: ESRI Detailed Age Profile, Hernando County.

FIGURE 3. HERNANDO COUNTY POPULATION AGE DISTRIBUTION AND PROJECTIONS



## Employment and Educational Opportunities

The details provided in Table 3 offer a comparative view of 2022 employment conditions in Hernando County alongside other counties in the Tampa Bay region, revealing several key insights and their broader implications:

1. **Higher Unemployment Rate:** Hernando County's unemployment rate of 3.6%, which exceeded Florida's average of 2.9% and is greater than the average of all Tampa Bay counties apart from Citrus County, indicates a relatively challenging job market within the County. This could reflect structural issues in the local economy, such as a mismatch between the skills of the labor force and the jobs available, or it might indicate a need for increased job creation within the County.
2. **Slower Job Growth:** The 3.6% annual increase in employment in Hernando County, while positive, lagged the state's growth rate of 5.0%, as well as its surrounding counties. This slower pace of job growth highlights potential limitations in the County's economic development and the need for targeted interventions to stimulate job creation and attract businesses. It may also point to the County's economic activities being concentrated in sectors that are experiencing slower growth compared to the statewide trends.
3. **Lower Median Household Income:** With a median household income of \$55,923, equivalent to approximately \$1,075 per week, Hernando County not only falls below the median incomes of almost all surrounding counties in the Tampa Bay region, but also likely reflects broader economic challenges faced by its residents, including affordability issues and a lower standard of living compared to neighboring areas. The exception of Citrus County, with a marginally lower median income, does little to mitigate the broader concern of economic disparity within the region.

TABLE 3. LABOR FORCE AND INCOME SUMMARY FOR TAMPA BAY COUNTIES

Area	Estimated Labor Force (based on participation rate by age cohort)	Annual Change in Jobs (%)	Employed Individuals	Unemployed Individuals	Unemployment Rate (%)	Household Median Income in 2022 (Fixed, 2023 \$)
Citrus	48,008	3.2%	52,132	2,229	4.1%	\$54,707
<i>Hernando</i>	<i>75,448</i>	<i>3.6%</i>	<i>71,347</i>	<i>2,664</i>	<i>3.6%</i>	<i>\$55,923</i>
Hillsborough	792,409	4.6%	1,064,954	30,678	2.8%	\$67,624
Manatee	187,259	5.5%	206,042	6,154	2.9%	\$73,483
Pasco	254,983	4.8%	210,681	6,516	3.0%	\$61,695
Pinellas	496,318	5.6%	654,206	17,463	2.6%	\$64,516
Florida	10,577,941	5.0%	13,382,922	399,696	2.9%	\$67,917

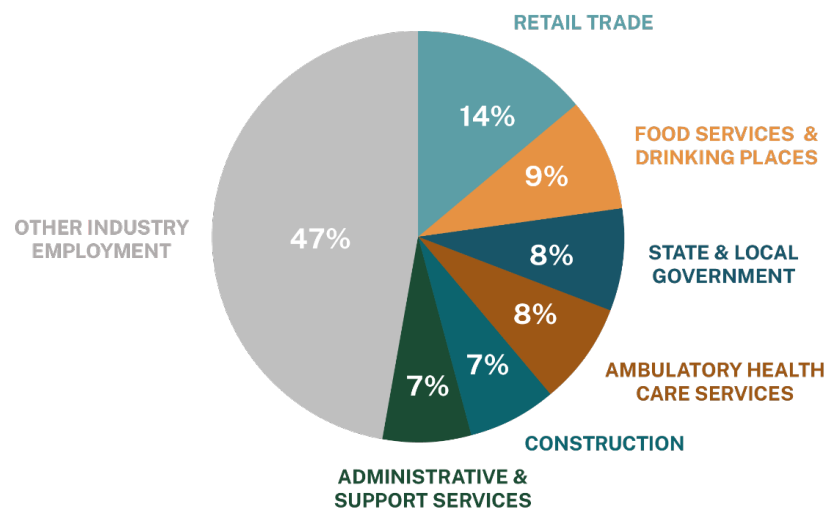
Source: REMI PI+ v3.0 Model of Tampa Bay Counties, TBRPC Calculations. Adjusted 2022 median income data to 2023 dollars.

Figure 5 and Table 4 detail the top six industries by employment in Hernando County as of 2022, highlighting the prevalence of sectors often associated with lower wages and varying skill levels.

These industries include:

1. **Retail trade**, known for its entry-level wages and high employment;
2. **Food services and drinking places**, where part-time and tipped positions predominate;
3. **Ambulatory health care services**, which offers a range from lower to higher-wage roles requiring specialized training;
4. **State and Local government**, encompassing a wide wage and skill range;
5. **Construction**, with its pathways from entry-level to skilled trades earning respectable wages; and
6. **Administrative and support services**, a sector that includes both lower-wage administrative roles and higher-skilled, better-compensated positions.

FIGURE 4. HERNANDO COUNTY'S TOP SIX LARGEST INDUSTRIES BY EMPLOYMENT (2022)



Source: REMI PI+ v3.0 Model of Tampa Bay Counties, TBRPC Calculations.

TABLE 4. TOP SIX INDUSTRIES BY EMPLOYMENT IN HERNANDO COUNTY (2022)

NAICS CODE	Industry Classification	Employment	Percent of Total Employment	Average Annual Wage Rate	Economic Output
44-45	Retail trade	9,799	14%	\$33,093	\$1,080,598,005
722	Food services and drinking places	6,330	9%	\$22,827	\$431,399,062
621	Ambulatory health care services	5,506	8%	\$55,883	\$684,303,654
NA	State and Local Government	5,643	8%	\$58,866	\$804,027,073
23	Construction	4,952	7%	\$33,422	\$727,309,588
561	Administrative and support services	4,963	7%	\$39,396	\$511,789,960
<i>Total of Top 6 Industries</i>		<i>37,194</i>	<i>53%</i>	<i>\$40,581</i>	<i>\$4,239,427,343</i>

Source: REMI PI+ v3.0 Model of Tampa Bay Counties, TBRPC Calculations.

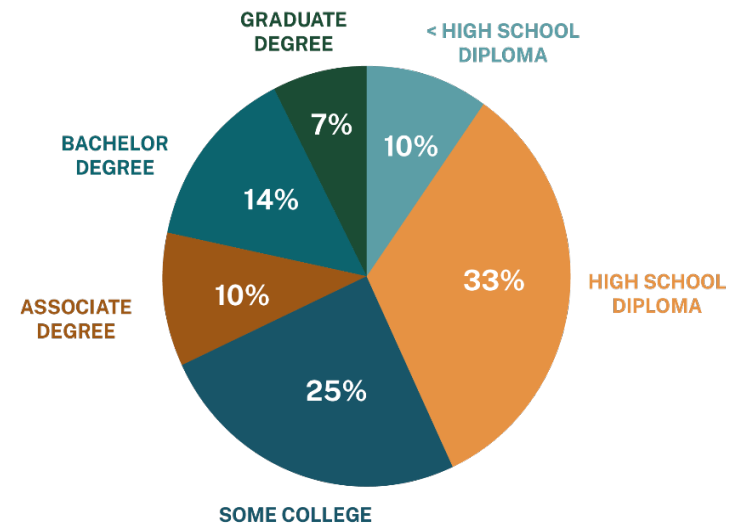


The variation in wage levels and skill requirements across Hernando County's top industries underscores the importance of aligning the educational composition of the workforce with the evolving needs of these and other targeted industries. Currently, 43% of the County's residents hold a high school diploma or less, while 57% have pursued some form of college education, though not all have completed a degree program (Figure 6). This educational makeup presents both opportunities and challenges in meeting industry demands, especially for sectors that require higher qualifications.

The National Association of Manufacturers' Q4 2021 Outlook Survey emphasizes a critical challenge: 83% of surveyed manufacturers reported the recruitment and retention of a qualified workforce as a significant barrier.<sup>5</sup> The persistent lack of adequately skilled workers, particularly in sectors of technology-related manufacturing, poses risks to Hernando County's local economic growth and the competitiveness of its manufacturing sector.

To bridge this gap, Hernando County is strategically positioned to utilize its educational institutions, such as Pasco-Hernando State College, Wilton Simpson Technical College, and Nature Coast Technical High School. By enhancing the educational attainment and adaptability of its residents, Hernando County can cultivate a more skilled, versatile, and competitive workforce.

FIGURE 5. HERNANDO COUNTY EDUCATIONAL ATTAINMENT (2022)



Source: Applied Geographic Solutions and GIS Planning.



Hernando County features numerous training programs to advance a strong talent pool with in-demand skills. Source: Hernando County Office of Economic Development.

<sup>5</sup> National Association of Manufacturers, "NAM Manufacturers' Outlook Survey Fourth Quarter 2021."

TABLE 5. TOP PRIVATE SECTOR EMPLOYERS IN HERNANDO COUNTY

Rank	Employer	Jobs	NAICS*	NAICS Description
1	Oak Hill Hospital	1,800	622110	General Medical and Surgical Hospitals
2	Wal-Mart Distribution Center	1,027	493110	General Warehousing and Storage
3	Tampa General Hospital (TGH) North	1,018	622110	General Medical and Surgical Hospitals
4	HealthSouth (Encompass Health)	335	622310	Specialty (except Psychiatric and Substance Abuse) Hospitals
5	Barrette Outdoor Living	350	332323	Ornamental and Architectural Metal Work Manufacturing
6	Cemex	250	327310	Cement Manufacturing
7	Hernando Pasco Hospice	221	621610	Home Health Care Services
8	Micro Matic	205	332999	All Other Miscellaneous Fabricated Metal Product Manufacturing
9	Accuform Signs, Inc.	194	339950	Sign Manufacturing
10	Spartronics	135	334418	Printed Circuit Assembly (Electronic Assembly) Manufacturing

Source: Hernando County, May 2024. \*NAICS: North American Industry Classification System.

## Housing Affordability

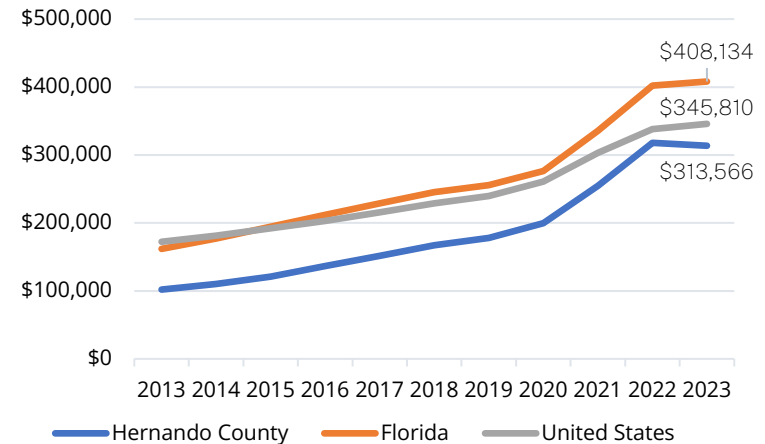
The correlation between median household income and median home value in Hernando County reveals a concerning home price-to-income ratio, suggesting that homeownership may be less accessible than ideal. This gap primarily stems from incomes not increasing at a rate sufficient to match the climbing housing prices, presenting potential affordability challenges for those seeking to purchase homes in the area.

In Hernando County, over 25% of households are considered cost-burdened, spending more than 30% of their income on housing-related expenses, such as rent or mortgage payments, and other housing needs. This statistic underscores the financial strain experienced by a considerable portion of the County's residents, indicating that for many, current income levels fall short of covering essential housing costs.

Further compounding the affordability issue is the distribution of housing tenure and income, Table 6 indicates that 80% of housing units are owner-occupied, with these owners earning a median income of \$64,516, while the remaining 20% are renter-occupied, with renters earning a median income of \$44,709.<sup>6</sup> Alongside a rising population, Hernando County has seen a steady increase in housing prices, with the median home value reaching \$317,901 in 2022.

While the TBRPC does not propose a specific housing strategy, such as a set number of new rental units by a certain date, these findings indicate the need for targeted interventions to address the growing divide between income growth and housing costs. By focusing on both the supply side, through affordable housing developments, and the demand side, by boosting local wages, policymakers and community leaders can work towards a more equitable and sustainable housing market in Hernando County.

FIGURE 6. AVERAGE HOME VALUE FOR HERNANDO, FLORIDA, AND THE U.S. (2013-2023)



Source: Zillow Home Value Index, [zillow.com/research/data/](https://www.zillow.com/research/data/)

TABLE 6. HERNANDO COUNTY HOUSING TYPE SUMMARY (2022)

Housing Type	Owned	Rented	Total
Single Family Units	53,262	8,752	62,014
Multifamily 2-9 Units	345	2,941	3,286
Multifamily 10 or More Units	339	2,029	2,368
Mobile Homes	9,375	1,970	11,345
<i>All Housing Types</i>	<i>63,321</i>	<i>15,692</i>	<i>79,013</i>

Source: Florida Housing Data Clearing REACH for Hernando County, 2022.

<sup>6</sup> Florida Housing Data Clearinghouse REACH, <http://flhousingdata.shimberg.ufl.edu/reach/results?nid=2600&nid=2606&nid=2699>

## 2. Opportunities Surrounding Industrial Land Conservation

As Hernando County's population growth rates continue to surpass both regional and state averages, the demand for goods, services, and housing intensifies, thereby creating opportunities for job creation that bolster economic vitality. Central to capitalizing on these opportunities is the strategic management of industrial land. Striking a balance in land use—satisfying the needs of target industries without compromising other essential land uses—is key to fostering balanced community development.

This chapter by TBRPC staff identify and present the opportunities surrounding industrial land conservation through the results of two technical analyses: a development scenario-based economic impact assessment which introduces the jobs-to-employed residents' ratio assessment framework, and a geographic information system (GIS) industrial land suitability analysis. The critical role of target industries and how industrial lands are currently utilized within the County is examined, which lays the groundwork for the industrial land use strategy and policy recommendations detailed in the concluding chapter.



Accuform Signs production space at the Brooksville - Tampa Bay Regional Airport & Technology Center; source: Tampa Bay Times.



Brooksville Industrial Park complex; source: Buckner Real Estate, Inc.



## 2.1 Benefits of Jobs and Housing Balance

Communities benefit from having a strong jobs and housing balance whereby there is a nearby job within a reasonable commute shed for every employed resident of a given community. Achieving this equilibrium helps to reduce overall vehicle miles traveled (VMT) for work and the associated potential for commute time congestion and greenhouse gas emissions. It also provides employers with strong access to a diversified workforce nearby. Hernando County currently has a weak jobs/housing balance with a ratio of 0.79. Losing land for employment use or failing to grow employment otherwise could shift this balance could cause a further shift towards out-commuting.

Comparisons of population, employment, and jobs are regularly reported by federal agencies such as the Bureau of Labor Statistics<sup>7</sup> and compared and analyzed by others such as Federal Reserve Economic Data (FRED) at the St. Louis FED.<sup>8</sup> Most familiar of these comparisons may be the unemployment rate (unemployed people v. population), while the labor force participation rate (labor force v. population), and employment-to-population ratio (employed people v. population) are also common.<sup>9</sup> This study utilizes a similar comparison, the jobs-to-employed residents (JER) ratio. The JER refers to the number of jobs available within the physical boundaries of Hernando County compared to the number of employed Hernando County residents.

FIGURE 7. JOBS-TO-EMPLOYED RESIDENTS (JER) RATIO EQUATION

$$\text{JER} = \frac{\text{Jobs In County}}{\text{Employed Residents In County}}$$

The JER is a distinct and useful tool for policymakers at the county level. It is distinct in using the REMI model's Residence Adjusted Employment figure, derived from the commuter income data from the Bureau of Economic Analysis.<sup>10</sup> It is useful because it can quantify how well a county is meeting the job needs of its residents. For example, a community that perfectly provides a job for every single working person living there would have a JER of one. A JER lower than one indicates that those working residents must be out-commuting to somewhere else, and a JER higher than one indicates that there must be in-commuters coming in to fill the labor gap.

The TBRPC uses the terms “jobs-balanced,” “jobs-rich,” and “jobs-poor” to better interpret the JER qualitatively. These terms correspond directly to the range of JER values but, more broadly, to the type of economy and job distribution a community has. Table 7 applies common qualitative descriptions to this distinction. A low JER ratio is not inherently harmful, nor is a high JER ratio inherently beneficial. Communities can, and do, aim for different mixes of residential and job-based land uses.

<sup>7</sup> U.S. Bureau of Labor Statistics: <https://www.bls.gov/news.release/empstat.nr0.htm>.

<sup>8</sup> Federal Reserve Bank of St. Louis: <https://fred.stlouisfed.org/series/EMRATIO>

<sup>9</sup> U.S. Bureau of Labor Statistics: <https://www.bls.gov/news.release/empstat.t01.htm>

<sup>10</sup> REMI : <https://www.remi.com/wp-content/uploads/2022/08/Model%20Overview.pdf?t=1661353571>

TABLE 7. COMPARISON OF QUALITATIVE TRENDS OF JOBS-TO-EMPLOYED RESIDENTS (JER) RATIO CATEGORIES

JER < 1 or "Jobs-poor"	JER = 1 or "Jobs-balanced"	JER > 1 or "Jobs-rich"
Low cost of living is attractive to first-time homeowners, retirees, and home-based businesses	Retains existing workforce and business community	High economic power will draw established businesses and skilled labor
Small/shrinking tax base makes it hard to provide services	Hard to maintain for an extended period	Cost-of-living hinders small business success and labor force growth
"It's a bedroom community."	"I never leave."	"It's a place to work, not a place to live."

TABLE 8. REGIONAL AND STATE JOBS-TO-EMPLOYED RESIDENTS (JER) RATIO COMPARISON (2022)

Area	Florida	Non-Tampa Bay	Tampa Bay	Citrus	<i>Hernando</i>	Pasco	Hillsborough	Pinellas	Manatee
JER	1.01	1.01	1.01	0.90	<i>0.79</i>	0.71	1.17	1.01	0.87

Source: REMI PI+ v3.0 Model of Tampa Bay Counties, TBRPC.

Table 8 provides a breakdown of the Tampa Bay region's counties by JER, including a comparison with the state of Florida. Florida exhibits a job-balanced state with a slight inclination towards in-commuting, meaning more people commute into the state for work than out. Hillsborough County, recognized for its large population and significant economic output within the Tampa Bay area, is categorized as jobs-rich with a JER of 1.17. This indicates that there are more jobs available in Hillsborough County than there are working residents, suggesting a strong local economy that can support its workforce and even attract workers from neighboring areas.

In contrast, Hernando County has a JER of 0.79, which implies there are about four jobs in Hernando County for every five working residents. This is the second-lowest JER among the counties in the Tampa Bay region, only ahead of Pasco County, which has a JER of 0.71. The lower JER in Hernando County highlights a gap between the number of available jobs and the working population, suggesting that a significant portion of the County's workforce may need to seek employment outside the County, leading to in-commuting. This metric

underscores the need for strategic economic development efforts in Hernando County aimed at creating more job opportunities to better align with the size of its workforce and reduce dependency on neighboring counties for employment.

Moreover, while not a perfect one-to-one correspondence, the JER has a notable relationship to average commute time, due to the nature of the relationship between where one works and where one resides, a jobs-balanced scenario results in the lowest average commute time, i.e., a JER around one is preferable.

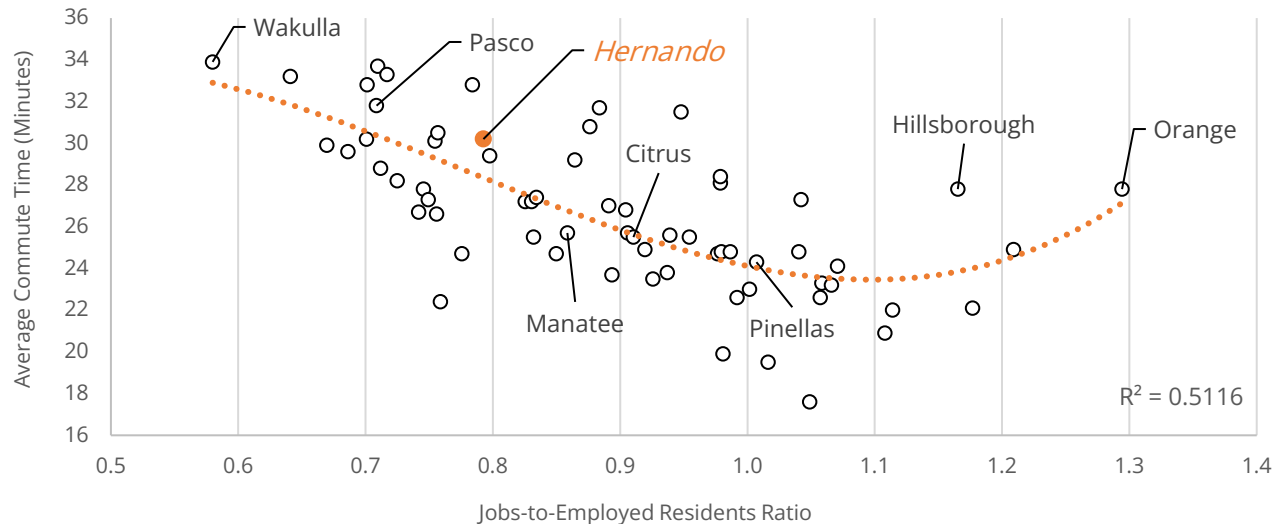
Pinellas County has the JER in Tampa Bay closest to one and has the lowest commute time, being over a full minute less each way than Citrus County, which has a JER of 0.9. Just as Hernando County's JER is the second lowest in the region behind Pasco, and Pasco is the only county with a longer average commute time. Intuitively, this is because there are not sufficient nearby or local jobs for Hernando County residents, and thus, many of them leave the County for work. Aiming to increase JER to around 1, will not only provide obvious economic benefits in terms of employment and economic output, but it could also lower average commute time. This could make Hernando County more competitive in attracting a workforce and maintaining that workforce.

TABLE 9. AVERAGE COMMUTE TIME BY COUNTY AND JER IN ASCENDING ORDER

County	JER	Average Commute Time (Minutes)
Pinellas	1.01	24.3
Citrus	0.90	25.5
Manatee	0.87	25.7
Hillsborough	1.17	27.8
<i>Hernando</i>	<i>0.79</i>	<i>30.2</i>
Pasco	0.71	31.8

Source: US Census American Community Survey (ACS), 2014-2018.

FIGURE 8. AVERAGE COMMUTE TIME VS. JOBS-EMPLOYED RESIDENTS RATIO FOR SELECTED FLORIDA COUNTIES (2022)



Source: U.S. Census Bureau, Mean Commuting Time for Workers (5-year estimate) in Hernando County, FL [B080ACS012053], retrieved from FRED, Federal Reserve Bank of St. Louis; <https://fred.stlouisfed.org/series/B080ACS012053>. REMI PI+ v3.0 Model of Florida Counties, TBRPC Calculations.

## 2.2 Economic Development Scenario Analysis

This study assumes that a balanced JER is a favorable and attainable goal for Hernando County and explores three potential development scenarios. Table 10 presents economic impact forecasts for Hernando County up to the year 2050, focusing on jobs, personal income, and economic output under various scenarios, with special attention to the County's targeted industries. The projections illustrate how changes in the Jobs to Employment Ratio (JER) could influence the County's long-term economic landscape.

### Potential Development Scenarios:

**Scenario 1: “Residential-Forward Growth”** – Increasing land values pressure the conversion of industrial land to other land use types. Hernando residents increasingly become out-commuters to other counties. The 2022 ratio of jobs to working people living in Hernando decreases, reaching a rate comparable to Pasco County's current JER 0.71 by 2050.

Results: Should the JER decrease to 0.7 by 2050, Hernando County could see a significant reduction in job availability, with 12,744 fewer jobs than current levels. This scenario predicts a 14.4% decline in employment opportunities, closely mirroring a 14.3% decrease in economic output, which translates to a loss of approximately \$2.7 billion. This outcome emphasizes the critical impact of a lower JER on the County's economy, highlighting the need for strategic interventions to prevent such a decline.

**Scenario 2: “Managed and Maintained Growth”** - Hernando County maintains its current land use and economic development policies, resulting in a slow-to-moderate growth in the ratio of jobs to working people living in Hernando, sustaining the County's pre-pandemic JER 0.8 ratio. By 2050, around one-in-five Hernando residents are forecasted to commute out of the County for work.

Results: Scenario with JER Maintaining at 0.8: If the JER remains steady at 0.8, counteracting the slight projected decline, Hernando County could expect a modest improvement in its economic conditions. This stability could lead to approximately 2.6% more jobs and \$486 million in increased economic output. Maintaining the JER at this level suggests a stable economic environment, possibly reflecting effective measures to balance job creation with workforce growth.

**Scenario 3: “Focused In-County Employment Growth”** - Hernando County implements focused land use policies and economic development strategies that over time create a job for every working Hernando County resident by 2050. This would require significant investment and public and private sector coordination to achieve.

Results: Scenario with JER Reaching 1: Achieving a JER of 1 by 2050 represents the most optimistic scenario, with a projection of 34,436 additional jobs being created and \$7.3 billion in addition output in Hernando County. This would signify a 39% increase over the baseline, dramatically boosting both employment opportunities and economic output. Reaching a balanced JER of 1 indicates a robust economic development strategy that aligns job availability directly with the size of the local workforce, fostering significant economic growth.

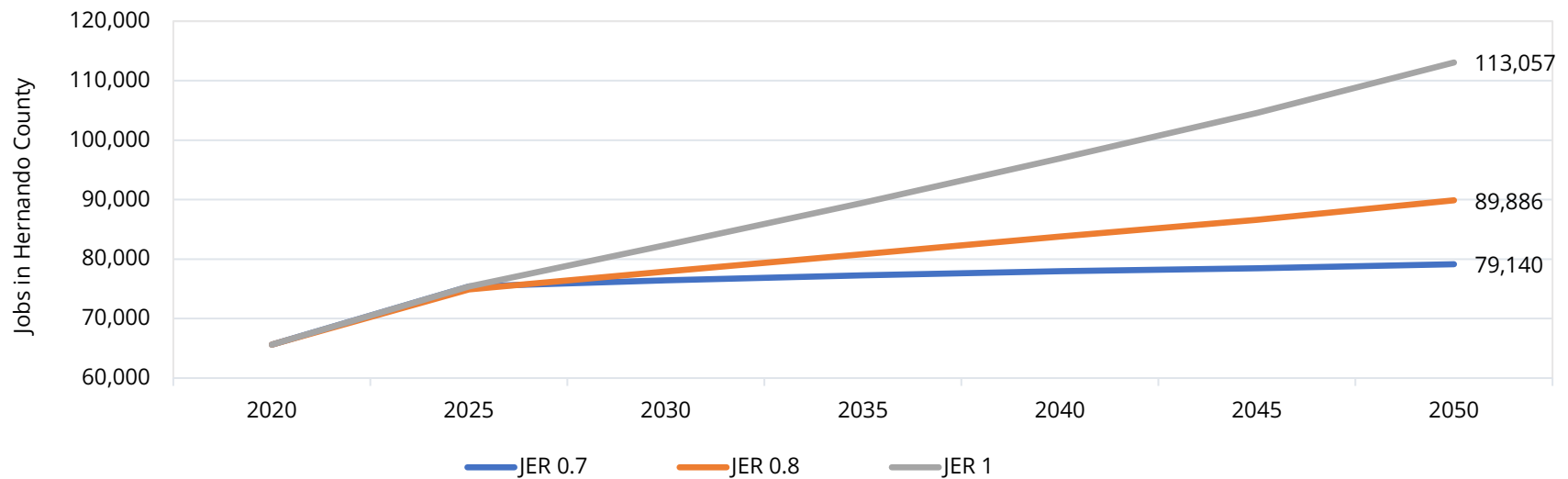


TABLE 10. SUMMARY OF THE ECONOMIC IMPACTS OF THREE DEVELOPMENT SCENARIOS BY 2050

Scenario	Jobs		Personal Income (Millions of Fixed 2023\$)		Economic Output (Millions of Fixed 2023\$)	
	<i>Jobs</i>	<i>%</i>	<i>Units</i>	<i>%</i>	<i>Units</i>	<i>%</i>
<i>Compared to Baseline</i>						
JER decreases to 0.7	-12,744	-14.4%	-\$590.9	-2.8%	-\$2,730	-14.3%
JER maintains 0.8	2,265	2.6%	\$104.4	0.5%	\$486	2.6%
JER increases to 1.0	34,436	39.0%	\$1,572.2	7.5%	\$7,387	38.8%

Source: REMI PI+ v3.0 Projections of Residence-Adjusted Employment, TBRPC Calculations, 2022 dollars adjusted to 2023.

FIGURE 9. TIMELINE COMPARISON OF HERNANDO JOBS NEEDS IN THREE SCENARIOS BY 2050



Source: REMI PI+ v3.0 Projections of Residence-Adjusted Employment, TBRPC Calculations.

Industry clusters, defined as regional concentrations of interconnected industries, play a crucial role in the dynamics of local and regional economies. There are two main types of clusters with distinct geographic patterns and competitive dynamics.

1. Traded clusters, or primary job clusters, comprise related industries that export products or serve markets beyond their regional location. Traded clusters serve as catalysts for economic growth and development within the economy,<sup>11</sup> offering higher wages and demanding specialized knowledge and skillsets compared to other sectors, leading to increased spending and a series of economic multiplier effects throughout the supply chain. For example, a business cluster in airplane manufacturing not only demands specific goods for operations but also indirectly supports job creation in related manufacturing sectors, such as those producing windows, tires, and airplane technology. The wages earned by employees in these industries further stimulate the economy by increasing demand for household goods and services.
2. In contrast, local clusters, or secondary job clusters, are industries serving the local market and are found in every region, their size typically mirroring the local population and fluctuating with its changes. These clusters provide essential goods and services to the local population and create a substantial number of jobs, in sectors such as hospitals and healthcare facilities, education services, local government services, and personal and laundry services, for example.

Hernando County employs a cluster development strategy in its economic development efforts, aiming to strengthen the local economy by focusing on the recruitment, retention, and expansion of key industry clusters. The County's targeted industries include several traded clusters, such as aviation and aerospace, manufacturing, and distribution and logistics, leveraging its locational advantages and existing assets to foster economic growth and job creation. In partnership with the State of Florida, Hernando County offers a suite of economic incentives to attract and retain employers in its defined target industries, including tax breaks, grants, site development assistance, and workforce training programs, all detailed in Appendix 1. However, despite these strategic efforts, the County finds its primary employment sectors skewed towards lower-wage industries like retail trade and food services, rather than the high-wage target industries like manufacturing, aviation, and distribution and logistics.

Table 11 outlines the industry mix in 2022, highlighting that jobs in targeted industries constitute 9.9% of total employment in Hernando County<sup>12</sup>. This proportion surpasses the state average for Florida and ranks high among adjacent counties. Specifically, only Hillsborough County (11.3%) and Manatee County (10%) boast a larger share of employment in these targeted sectors. Despite Hernando's smaller scale, particularly in comparison to Pinellas where it has roughly one-tenth the overall employment, the ratio of targeted industry jobs to other jobs is nearly the same. The comparison between the target industry employment ratios of Hernando County, other Tampa Bay area counties, and the entire state of Florida utilizes Hernando's definition of targeted industries. Although the exact industries targeted may

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<sup>11</sup> Hernando County Business Resource Hub — Hernando Business," Hernando Business, n.d., <https://www.hernandobusiness.com/businessresourcehub>.

<sup>12</sup> REMI PI+ v3.0 Model of Tampa Bay Counties, TBRPC Calculations

vary across these regions, applying a uniform standard facilitates a direct comparison. This indicates that while Hernando County has a relatively high proportion of jobs in its targeted industries, the overall employment landscape is still dominated by lower-wage sectors.

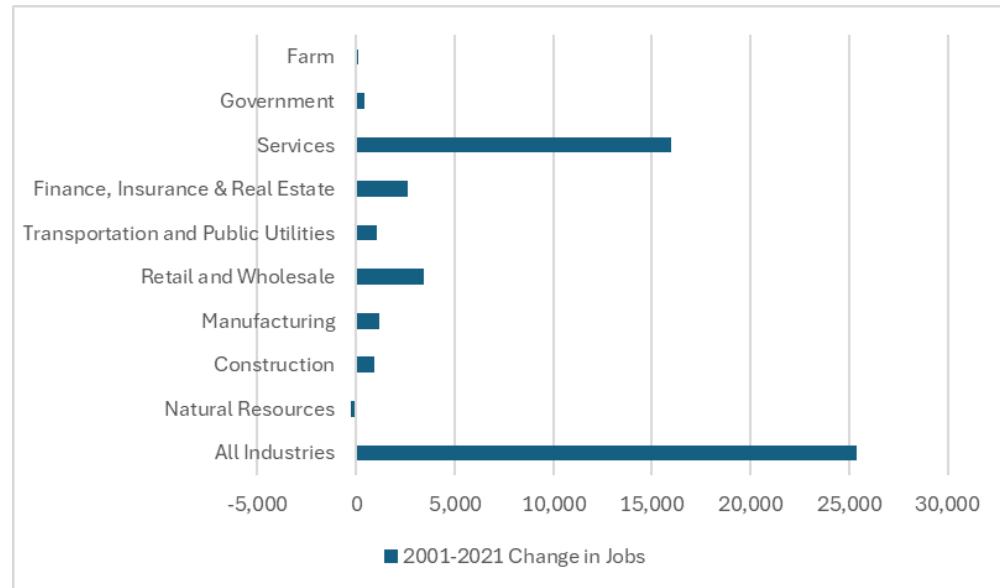
TABLE 11. HERNANDO TARGET INDUSTRY RATIOS OF TAMPA BAY COUNTIES AND FLORIDA (2022)

Employment	Florida	Citrus	Hernando	Hillsborough	Manatee	Pasco	Pinellas
<i>All Industries</i>	13,382,922	52,132	71,347	1,064,954	206,042	210,681	654,206
Target Industries	1,295,368	2,788	7,050	120,174	20,582	17,730	64,663
Other Industries	12,087,554	49,344	64,297	944,780	185,460	192,951	589,543
<i>Percentage</i>	9.7%	5.3%	9.9%	11.3%	10.0%	8.4%	9.9%

Source: REMI PI+ v3.0 model of Tampa Bay Counties, TBRPC Calculations. Note: Among Hernando County's targeted industries, aviation and aerospace, manufacturing, and distribution & logistics, are included above as a reference for comparison.

As seen in Figure 11, between 2001 and 2021, Hernando County grew by about 25,413 jobs representing a 58% increase. The services sector made up most of this growth with 15,955 jobs added in this period, a 93% increase or nearly doubling that of the industry. Retail and wholesale were the second largest growing industries with 3,407 jobs added, a 45% increase, followed by finance, insurance, and real estate at 2,619 jobs or a 79% increase. Manufacturing, while lower in number at 1,183 jobs added, represents the second highest growth rate at 80%. The rate of job growth is encouraging for the future of Hernando County; however, some caution should be shown towards the service and retail industry sectors due to their lower wage levels. High-wage manufacturing job growth could be eclipsed by the growth of these lower wage industries if industrial land and development is not prioritized.

FIGURE 10. 20-YEAR CHANGE IN EMPLOYMENT BY INDUSTRY (2001-2021)



Source: REMI PI+ v3.0 model of Tampa Bay Counties.

Using the projected need for 34,436 jobs by 2050, see Scenario 2: “Managed and Maintained Growth” (Table 10, page 25), this study lays out two potential futures. The County should aim for a 10 percent employment mix in target industries by 2050, equating to 3,444 jobs. To illustrate the significance of target industries, below is a comparison of two scenarios for these 3,444 direct jobs: one where they are all retail industry jobs, and another where they are a mix of target industries. The results, modeled using REMI for Hernando County, are shown below.

TABLE 12. COMPARISON OF 10% OF ADDITIONAL JOBS IN RETAIL VERSUS TARGET INDUSTRIES IN HERNANDO COUNTY IN 2050

Scenario	Job-Years		Personal Income (Millions of Fixed 2023\$)		Economic Output (Millions of Fixed 2023\$)	
	<i>Jobs</i>	<i>%</i>	<i>Units</i>	<i>%</i>	<i>Units</i>	<i>%</i>
<i>Compared to Baseline</i>						
#1: 10% in Retail	5,036	5.7%	\$262	1.2%	\$1,165	6.1%
#2: 10% in Target Industries	5,369	6.1%	\$337	1.6%	\$1,535	8.1%
Difference	333	0.4%	\$75	0.4%	\$370	1.9%

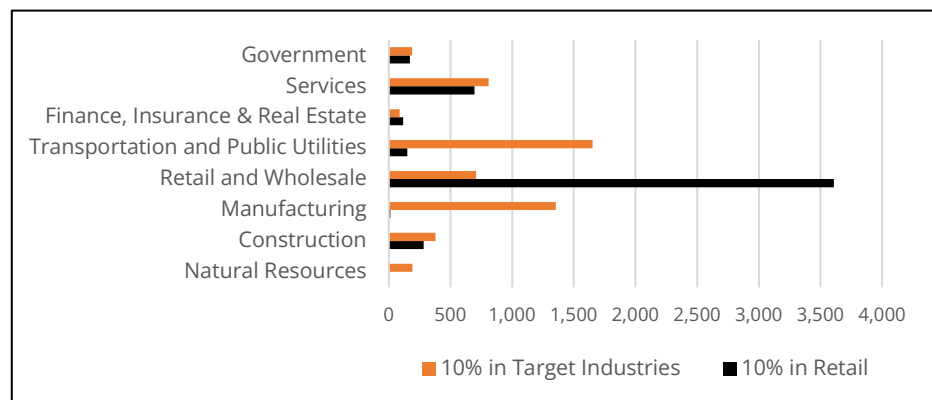
Source: REMI model of Hernando County, TBRPC Calculations.

While the difference in jobs and personal income is relatively small—333 additional jobs (a 0.4 percent increase) in the target industry mix scenario—the economic output is 1.9 percent higher than in the retail industry scenario. Figure 12 illustrates the industry composition that explains this difference.

In the retail scenario, most employment impacts remain within the retail sector, which has relatively low productivity. Although some jobs are created in services, construction, and government, they are overshadowed by retail jobs.

In contrast, the target industry scenario has a more balanced direct impact and more widespread indirect and household spending impacts. Transportation and public utilities (logistics) and manufacturing experience the most significant job impacts, but all sectors benefit. Notably, even in the target industry scenario, the retail and wholesale sector still grew by 708 jobs.

FIGURE 11. JOBS BY MAJOR INDUSTRY SECTOR IN TWO DEVELOPMENT SCENARIOS



Source: REMI model of Hernando County, TBRPC Calculations.



TABLE 13. RANKED COMPARISON OF 3,444 JOBS IN 2050 DISTRIBUTED TO DIFFERENT INDUSTRY SECTORS

Industry	Employment	Output (Millions)	Personal Income (Millions)	Score	Rank
Manufacturing	7,584	\$1,886	\$535	19	1
Finance, Insurance, and Real Estate	8,588	\$2,597	\$343	17	2
Retail and Wholesale Trade	7,127	\$1,401	\$484	16	3
Transportation	6,648	\$1,043	\$429	13	4
Services	5,892	\$790	\$366	10	5
Construction	5,206	\$750	\$282	6	6
Natural Resources	4,948	\$362	\$198	3	7

Note: The employment figures include 3,444 direct jobs.

Source: REMI PI+ Model of Tampa Bay Counties, TBRPC Calculations using the Study feature for 2050 across seven major industries in Hernando County.

Using 10 percent of the total jobs target (3,444 jobs) by 2050 as a reference, Table 13 demonstrates the value of the jobs mix in economic development planning. These 3,444 jobs were input into a model of Hernando County's economy, one at a time, in each of seven industry sectors for the year 2050. Each scenario was run through an economic forecast compared to a baseline, and the differences served as the basis for comparison. Three indicators (employment, output, and personal income) were used to compare the different scenarios.

Based on their rankings in each category, the impacts of each industry sector were awarded points inversely proportional to their ranking out of seven. For example, rank #1 received 7 points, rank #2 received 6 points, and so on. The cumulative total of the three categories provided an overall score for each scenario. This method is similar to scoring in project prioritization or grant awardee selection. The three categories were given equal weights.

The highest-ranked industry was manufacturing. While it was second to finance, insurance, and real estate (FIRE) in employment and economic output, manufacturing was overwhelmingly the highest category for new personal income generated. Although the FIRE industry employs many people and produces high economic output, it does not translate into widespread higher wages. The same overall number of jobs can result in significantly different economic outcomes depending on the job mix and industry type. Therefore, careful consideration must be given to this mix when attempting to achieve a jobs target.

## 2.3 Assessing the Spatial Dynamics of Industry Clusters

To better understand the misalignment between Hernando County's current employment composition and its high-wage target industry employment areas, the TBRPC utilized the Florida Department of Revenue's (DOR) Property Use Codes to create a baseline of Hernando County's existing land use composition. This methodology ensures a standardized classification across the state and allows for more consistent and comparable analysis of land use patterns, not just within a single county, but across multiple jurisdictions. The frequent updates of these codes, based on tax assessment data, offer a current and precise snapshot of land utilization, contrasting with future land use or zoning designations that outline intended or potential uses. The complete unaggregated list of the DOR Property Use Codes applied in this analysis is available in Appendix 5.

Current land use composition by DOR Property Use Code:

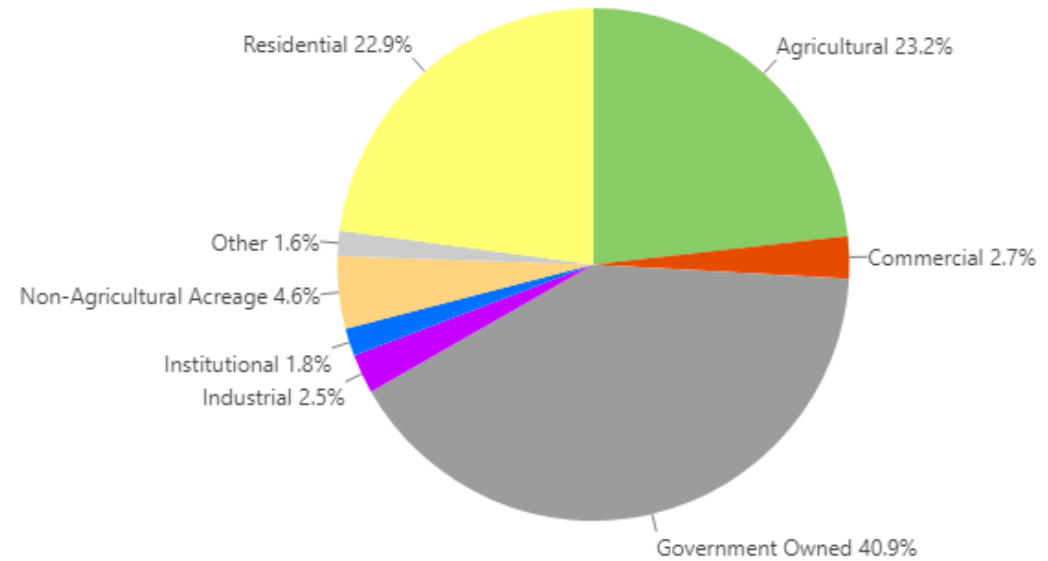
- The parcel records for Hernando County cover a total area of 322,378 acres, with the predominant land use being government-owned properties, which make up 40.9% of the County, or 131,707 acres. This extensive area is chiefly allocated for environmental conservation, encompassing various parks, wetlands, wildlife preserves, and protected natural habitats. Notable conservation areas include the Chassahowitzka Wildlife Management Area and Weekiwachee Preserve to the west, alongside the Withlacoochee State Forest to the east.
- Agriculture is the second major land use, occupying about 23.2% of the County, equivalent to 74,832 acres. This sector includes a mix of farmlands, ranches, and orchards that significantly contribute to Hernando County's agricultural production. Residential land use, most significantly single-family residential areas at low densities, closely follows, comprising 22.9% of the parcel record.
- Employment-related lands, such as industrial and commercial zones, occupy a smaller portion of the County's land use. Industrial areas account for 2.5% or 7,973 acres, supporting manufacturing, distribution, and warehousing activities. Commercial areas make up 2.7% or 8,614 acres, accommodating retail, services, and business operations. This highlights the relatively small proportion of land currently used for industrial/employment purposes compared to other land uses.
- Institutional land use, which includes lands designated for institutions serving public or community needs like schools and colleges, hospitals and healthcare facilities, government buildings, religious centers, cultural institutions, and public safety facilities, accounts for 1.6% or 5,648 acres.
- The DOR Property Use Codes identify Non-Agricultural Acreage as constituting 4.6% of the County, or 14,791 acres. This classification covers land not engaged in farming, ranching, or any agricultural activities. Additionally, the category labeled "Other," making up 1.6% of the County or 5,030 acres. Both categories encompass lands whose specific uses are not explicitly detailed by the DOR codes but may include a variety of uses such as residential, commercial, industrial, government-owned properties, vacant lands, and recreational areas.

TABLE 14. HERNANDO PARCEL ACREAGE BY USE TYPE

Property Use Type	Parcel Acreage
Industrial	7,973
Commercial	8,614
Agricultural	74,832
Non-Agricultural	14,791
Institutional	5,648
Residential	73,783
Government owned	131,707
Other	5,030
<i>Total</i>	<i>322,378</i>

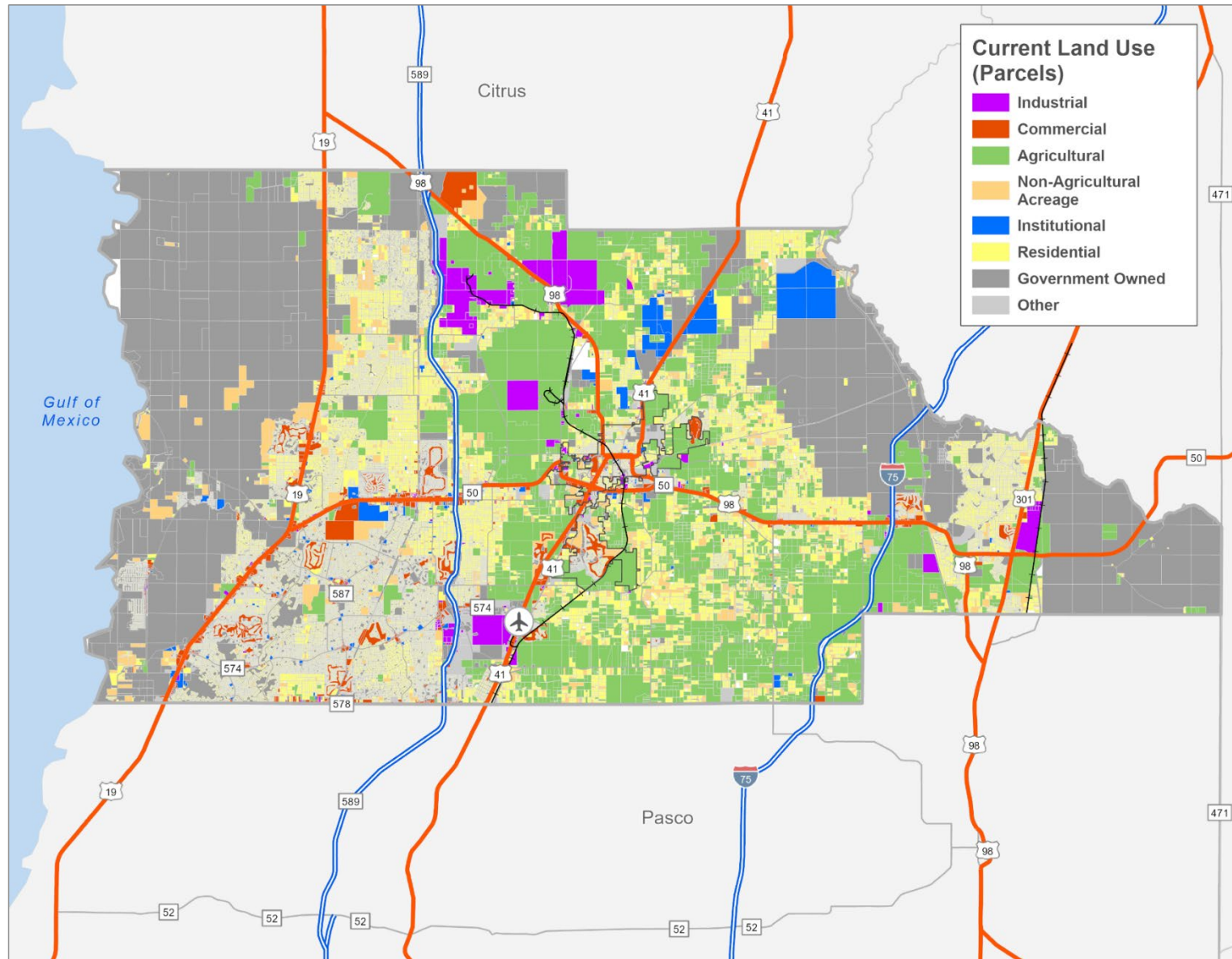
Source: Hernando County GIS, 2023.

FIGURE 12. AREA PERCENTAGE OF HERNANDO LAND USE TYPES



Source: Hernando County GIS, 2023.

FIGURE 13. HERNANDO COUNTY LANDS BY CURRENT PROPERTY USE



Data Source: Hernando County GIS, 2023. Map by TBRPC.



Evaluating the alignment of the current land supply and its designated uses is crucial for sustaining economic growth in Hernando County. Although the presence of industrial land alone does not ensure job attraction, the absence of suitable industrial areas can significantly hinder job creation potential. Currently, Hernando County has a limited supply of industrial land allocated, 2.5% or 7,973 of the 322,378 acres in the County. Although limited in its supply when compared to other land uses, Hernando County does have areas distinguished by industrial and employment-related clusters, as detailed in Table 15 and illustrated in Figure 15.

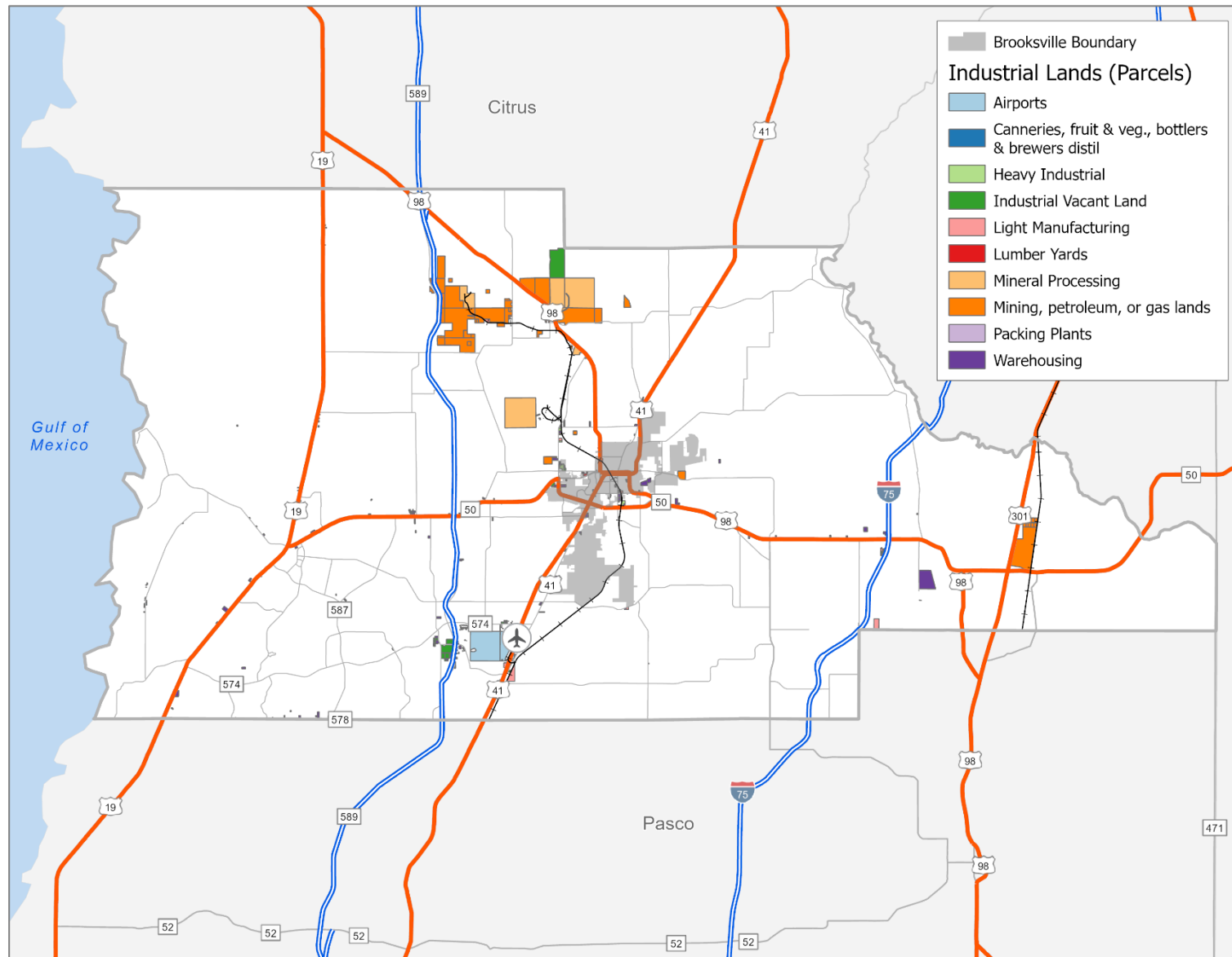
A prime example is the County-owned Brooksville-Tampa Bay Regional Airport and Technology Center (BKV), sprawling across 2,400 acres. This joint civil-military airport supports both aeronautical and non-aeronautical businesses, serving general aviation while also being home to some of the County's largest employers, including premier manufacturers and aerospace suppliers. With sites ready for development, this target industry cluster is a hub of economic activity and innovation, exemplifying the achievements of Hernando County's economic development strategies.

In addition to the aviation and technology center, local phosphate and limestone mining activities significantly contribute to the County's industrial land use, especially in the central to north central and far eastern regions. These sectors underscore the diverse industrial base of Hernando County and its potential for further economic growth.

TABLE 15. DISTRIBUTION OF INDUSTRIAL LANDS BY CURRENT PROPERTY USE

Use Code	Description	Parcels	Acres
20	Airports	8	990
40	Industrial Vacant Land	46	516
41	Light Manufacturing	48	174
42	Heavy Industrial	5	38
43	Lumber Yards	2	12
44	Packing Plants	1	4
45	Canneries, Fruit & Vegetables, Bottlers & Brewers Distil.	1	1
47	Mineral Processing	8	1,895
48	Warehousing	225	703
92	Mining, Petroleum, or Gas Lands	60	3,639
	<i>Total</i>	<i>404</i>	<i>7,973</i>

FIGURE 14. HERNANDO COUNTY INDUSTRIAL LANDS BY CURRENT PROPERTY USE



Data Source: Hernando County GIS, 2023. Map by TBRPC.

Additionally, Planned Development Districts (PDDs) in Hernando County, like those in many jurisdictions, are designed to provide a more flexible approach to zoning and land use than traditional zoning districts. These districts are typically established to accommodate mixed-use developments, residential communities, commercial centers, or industrial parks, allowing for a combination of uses within a defined area. PDDs often include specific standards and guidelines related to the layout, density, design, and types of uses permitted, aiming to create cohesive, well-planned environments that meet both the community's needs and the developer's objectives.

The Hernando County Comprehensive Plan and Future Land Use Map indicates the presence of industrial or employment-related initiatives in the PDDs outlined in Table 16 and highlight areas designated for future industrial and employment-related uses (Figure 16). Key areas include expansions around the Brooksville-Tampa Bay Regional Airport and strategically located parcels to support future industrial growth adjacent to future mining uses.

The current and future land use plans for industrial areas in Hernando County are significant for several reasons:

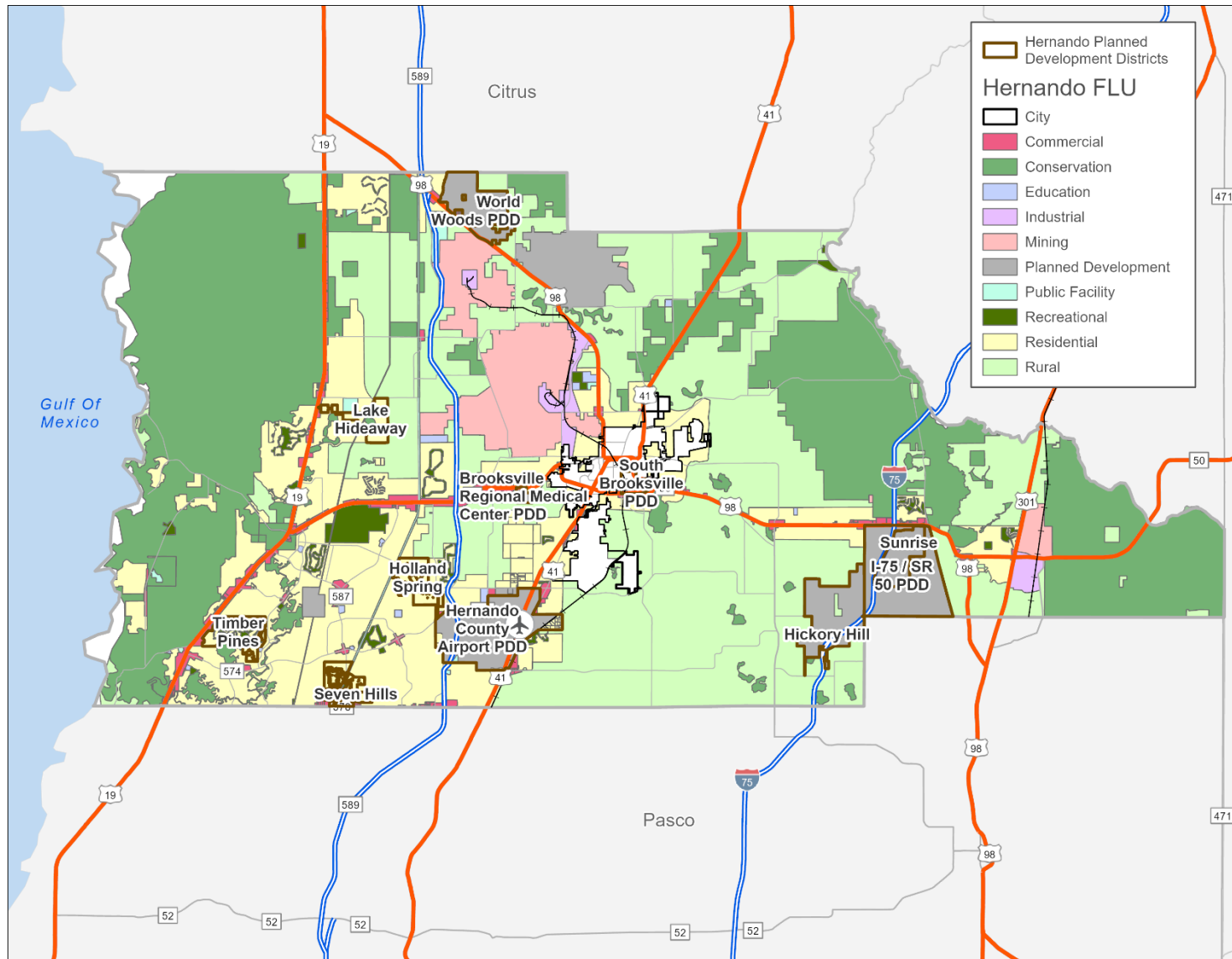
1. Economic Growth: Properly designated industrial areas attract businesses and create job opportunities, contributing to the county's economic vitality.
2. Diverse Industrial Base: Supporting diverse industrial activities, from manufacturing to mining, ensures a robust and resilient local economy.
3. Strategic Planning: Aligning industrial land use with economic development goals ensures sustainable growth and efficient use of land resources.

TABLE 16. PLANNED DEVELOPMENT DISTRICTS CONTAINING EMPLOYMENT-RELATED USES

Planned Development District (PDD)	Parcels	GIS Acres	Predominate Uses
I-75/SR-50	450	5,014	Agricultural
Airport	788	4,471	Aviation and Light Manufacturing
Brooksville Regional Medical Center	12	148	Institutional and Commercial
World Woods	48	2,134	Recreation and Tourism
South Brooksville PDD	462	409	Commercial, Industrial and Residential

Source: Hernando County GIS, 2023.

FIGURE 15. HERNANDO COUNTY FUTURE LAND USE (FLU) CATEGORIES AND PLANNED DEVELOPMENT DISTRICTS



Data Source: Hernando County GIS, 2023. Map by TBRPC.



## 2.4 Industrial Land Suitability Analysis

Evaluating the alignment of Hernando County's land supply with its economic development goals is crucial for sustaining growth. The strategic management of industrial land is particularly vital, given the historical pressure to convert such lands to other uses, often driven by the allure of quick, short-term gains from retail and residential development. These sectors, though profitable for landowners and developers, typically contribute less to the local economy compared to industrial developments, which offer higher-wage jobs and long-term economic benefits.

Counties throughout the Tampa Bay region have witnessed a trend of industrial lands being reclassified, exacerbated by legislative changes, including House Bill 1339 in 2020, Senate Bill 962 in 2021, and the Live Local Act in 2023, which streamline the process for converting industrial and employment lands into residential zones under certain conditions, such as meeting affordable housing thresholds. While these efforts have the potential to positively influence the supply of affordable housing throughout Florida, there is concern about the loss of land to support targeted industry job growth and economic diversification in the state's growing counties. In response, amendments proposed in the Florida legislature—Senate Bill 328 and House Bill 1239—seek to revise the Live Local Act to exempt industrial zones and areas near airports from land use conversion, focusing on preserving those industrial lands. However, regardless of if this policy change becomes law, communities are encouraged to assess which lands should be preserved for targeted employment uses and set policies to protect these sites.

Complex spatial problems, such as land use decisions, typically involve a large set of feasible alternatives and multiple, conflicting, and incommensurate evaluation criteria. To address these challenges, the TBRPC staff prepared a GIS-based land suitability analysis to identify areas of potential for investment using the following criteria: proximity to existing clusters of industrial lands, and along an established truck route or freight rail corridor, along which a thousand-foot buffer has been generated along the centerline of each applicable centerline. Conservation areas and hazards were used to screen out any potential areas of suitability to avoid flood-prone areas and to protect natural habitats. When constraints are screened, the remaining lands represent highly suitable lands for industrial lands and illustrate the relative strength of different locations in the County for potential employment growth. Key assumptions, analysis methodology and data sources can be found in Appendix 5.

### **Suitability Analysis Key Findings:**

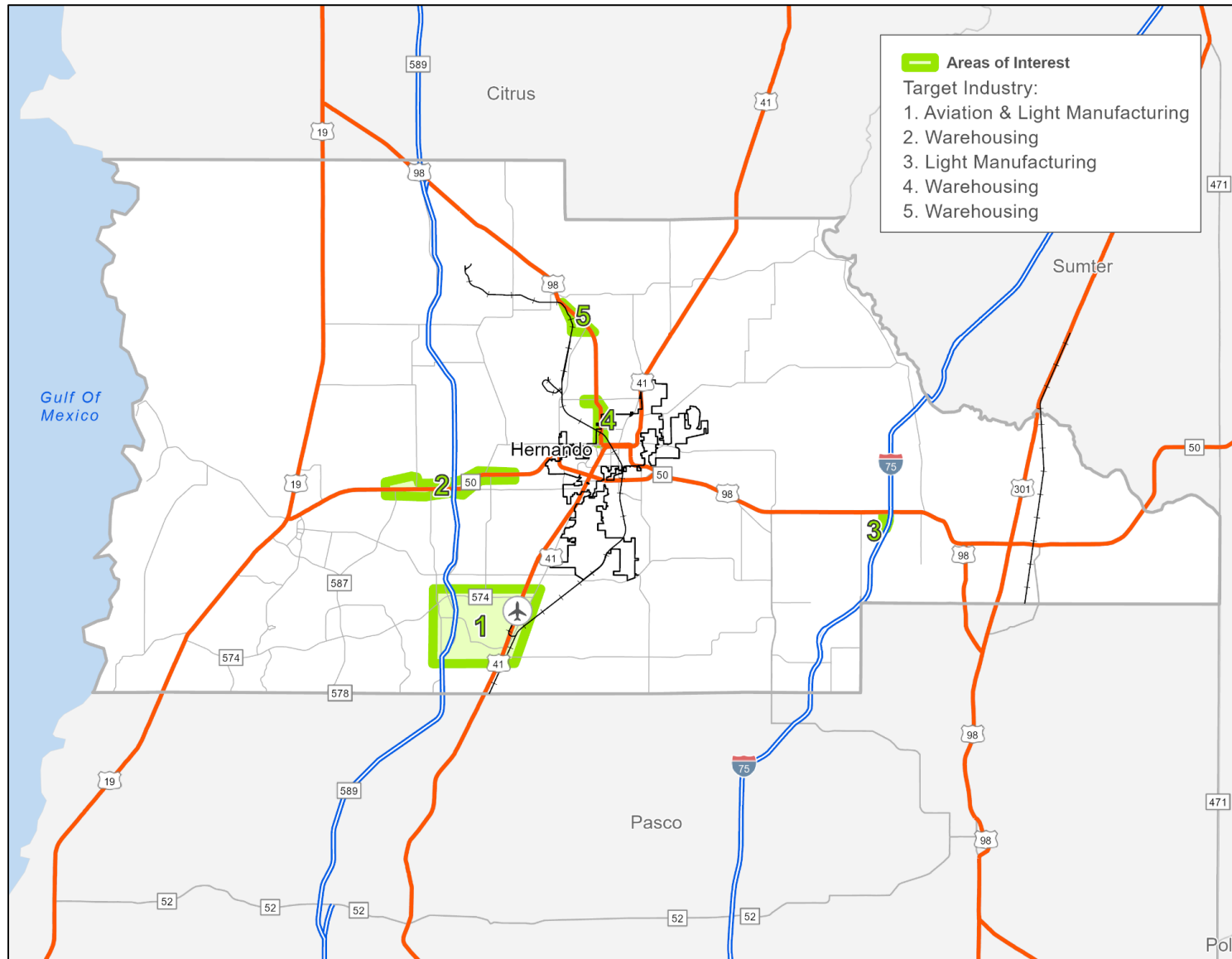
1. Figures 17 and 18 highlight 6,845 acres of priority lands within five designated areas of interest (AOIs) for industrial retention and expansion. Of these, 1,433 acres are already zoned industrial, with 177 acres currently vacant. However, the current industrial parcels are fragmented, with only 516 acres of vacant industrial land available, much of which is adjacent to a large mineral processing facility not aligned with strategic economic targets or targeted industries. A significant cluster near the airport offers opportunities for aviation, aerospace, manufacturing, and logistics, aligning with the County's economic goals. Proximity to

economic drivers like the airport and major transportation networks ensures robust infrastructure and connectivity. Despite this, the fragmentation of the remaining vacant industrial land poses challenges for cohesive development and attracting targeted industries.

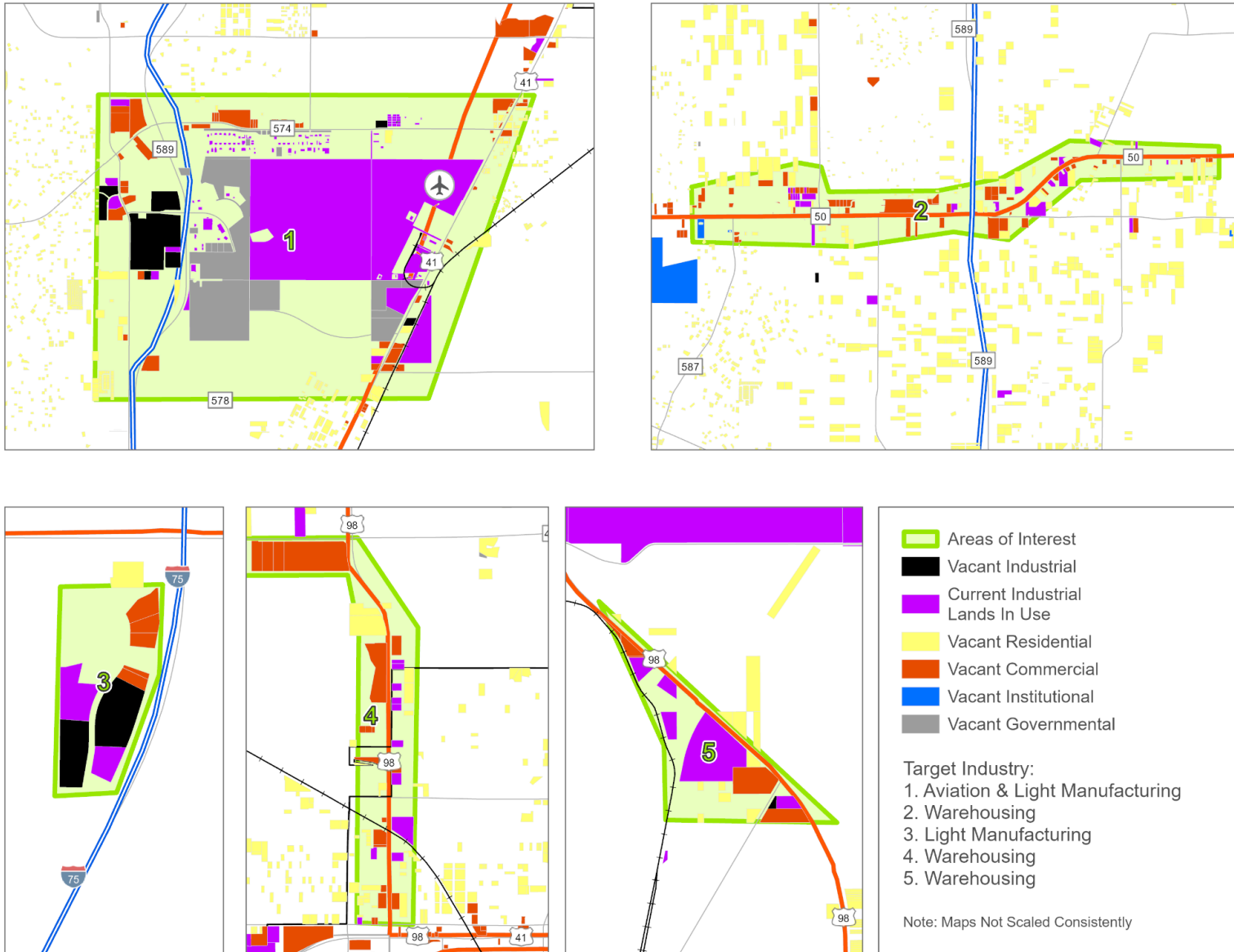
2. Currently, Hernando County has a limited supply of industrial land allocated. Yet, the configuration and size of industrial parcels in the County vary significantly among warehousing and distribution uses, indicating the capability to accommodate a wide range of industrial activities, from small-scale operations to large industrial developments. This diversity in parcel size suggests that, despite the limited distribution, the County has the potential to support a broad spectrum of industrial growth, assuming there is a strategic effort to optimize land use in line with the County's economic objectives and target industries. The TBRPC does not suggest that all the land within the AOs become part of an industrial sanctuary, but rather, recommends the consideration of these areas as a starting point for further analysis and stakeholder engagement within those communities.
3. An important consideration for Hernando County is the adaptive reuse potential of lands currently designated for mining.
  - a. As mining activities conclude, these lands can be repurposed for manufacturing or other employment-generating industrial uses. This adaptive reuse can help address the fragmentation of industrial parcels by providing large, contiguous areas suitable for industrial development. Additionally, reusing mining lands for industrial purposes can mitigate environmental impacts by utilizing already disturbed lands rather than converting new greenfield sites.
  - b. While adaptive reuse offers opportunities for economic growth and sustainable development, several potential challenges need to be addressed to ensure successful transformation. These challenges, which may be cost-prohibitive and deter future investment, include the high initial investment required for site preparation, environmental remediation, and establishing essential infrastructure such as roads, utilities, and wastewater management systems. Furthermore, ensuring geotechnical stability and addressing potential land subsidence are critical considerations.

Moving forward, Hernando County can apply this information to take strategic actions that prioritize industrial growth. This entails leveraging vacant properties for employment purposes, encouraging property development at higher density to accommodate more jobs per acre, and protecting designated industrial areas from conversion to non-industrial uses; strategies further discussed in the concluding chapter. Through these efforts, Hernando County can achieve a balanced development that supports its long-term economic objectives and fosters a vibrant, diversified economy.

FIGURE 16. INDUSTRIAL EXPANSION AREAS OF INTEREST IN HERNANDO COUNTY



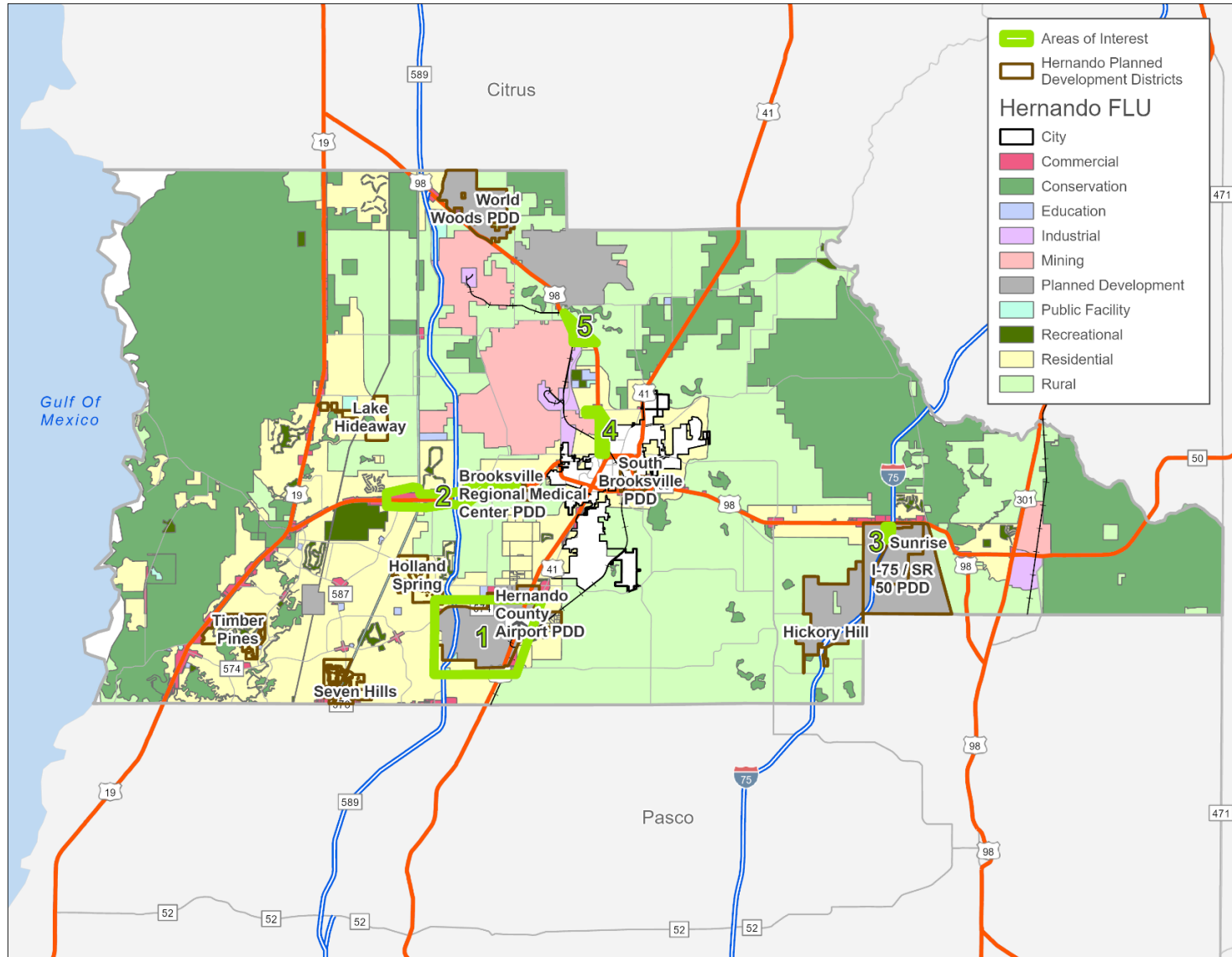
Data Source: Hernando County GIS, 2023. Map by TBRPC.



Data Source: Hernando County GIS, 2023. Map by TBRPC.



FIGURE 17. DISTRIBUTION OF FUTURE LAND USE CATEGORIES, PLANNED DEVELOPMENT DISTRICTS, AND AREAS OF INTEREST



Data Source: Hernando County GIS, 2023. Map by TBRPC.

### 3. An Industrial Land Strategy for Hernando County: A Summary and Recommended Actions

Economic expansion, including improvements in average wages, total wage growth, and the overall value of goods and services produced in the County, isn't solely influenced by a single land use decision. Factors such as market dynamics, entrepreneurial initiatives, and public investment play pivotal roles in driving the economy and job creation in Hernando County. However, making land available for job opportunities broadens the scope for future economic development. By refining its policies and setting clear, achievable targets, Hernando County can enhance average wage levels, ensure job availability for its workforce, and potentially shorten commuting times compared to the metropolitan average, all while securing overall employment growth and a larger proportion of target jobs within its economy.

Allocating sufficient land for the growth of target industries, which have high employment multipliers, is key to generating new job opportunities across Hernando County's crucial industry sectors. Beyond the direct employment these industries provide, the ripple effects of spending by households and businesses further contribute to job creation. Thus, dedicating enough land for the development of target industries is essential for boosting overall employment and achieving the goal of one job per employed resident, effectively narrowing the employment gap.

In the preceding analysis, TBRPC staff identified the following key findings:

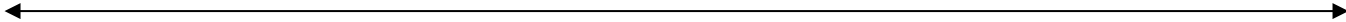
1. Hernando County's economic development trends, most notably its proximity to major transportation routes and growing population, as well as its availability of developable lands contribute to its appeal for industrial growth and economic development.
2. To achieve a balanced jobs-to-employed residents' ratio by 2050, the County should add about 34,436 new jobs, with a goal to have approximately 10% of those new jobs associated with target industry employers.
3. 6,845 acres of priority lands were identified across five designated areas of interest (AOIs); delineated areas that are appropriate for further analysis as potential future industrial sanctuaries. 1,433 acres within AOs are already designated as industrial, of which 177 acres are vacant. Additionally, 1,119 acres of other vacant lands were identified (vacant commercial, governmental, institutional, and residential lands). TBRPC staff do not suggest that all the land within the AOs become part of an industrial sanctuary; instead TBRPC recommends that these areas be considered as a starting point for stakeholder engagement and continued analysis.
4. A strategy for the conservation of industrial lands is needed to enhance the County's ability to maintain a balance between providing sufficient land for quality employment opportunities and housing to accommodate its expanding population. TBRPC staff recommend the County consider the implementation framework outlined in this chapter.

## FROM FINDINGS TO ACTIONS

Overall, in every community, the decision of where and how to preserve or convert industrial lands must balance various factors from both local and county-wide perspectives. In Hernando County, the present need for industrial land preservation is driven more by competition for residential uses than by spatial limitations. Residential development is less time-intensive and risky compared to the coordination needed to maintain investment interests during land assembly.

There is a diversity of needs for employment-generating lands throughout Hernando County, and some areas are more suitable than others. Hernando County should consider a variety of factors (Table 17) in decision-making and apply one or a combination of the strategies outlined in this chapter where most applicable.

TABLE 17. FACTORS INFLUENCING INDUSTRIAL LAND RETENTION AND CONVERSION

Factor	Retain as industrial.	Convert to mixed use or residential.
		
Economy	Clusters of existing developed industrial land	Non-viable parcels due to size, shape, or isolation
Transportation	Proximity to distribution centers, existing truck routes, proximity to multimodal commuter options	Proximity to transit, but not major truck route
Compatibility	Brownfield site, remediation infeasible	Environmental nuisances
Adequacy of supply	Low vacancy rates for industrial buildings	High vacancy rates for industrial in obsolete buildings

The TBRPC recommends that Hernando County consider the following strategic planning actions:

1. Increase the number of job opportunities available relative to the number of residents actively seeking employment by employing the "jobs to employed residents' ratio" as a framework for measuring change.
  - a. Identify a job growth goal through 2050 to balance future target industry-serving land use decisions against the other land use needs of the public. The goal should aim to improve the jobs-to-employed residents' ratio and the proportion of target industry jobs within county employment. Aim to add at least 34,436 new jobs by 2050, with 10% of these new jobs associated with target industry employers. This action will establish a measurable framework to track the impact of industrial land conservation initiatives on local economic opportunities and enable informed adjustments to strategies over time.
2. Adopt land use policies that accommodate job growth goals, protecting industrial and employment-related lands in suitable areas:
  - a. Delineate areas suitable for further analysis as potential future industrial sanctuary overlay zones. These areas should prioritize the advantages of strategic locations, maximizing benefits derived from proximity to transportation networks, suppliers, and markets. The boundaries will be based on centerline buffers of established truck routes or rail corridors with existing concentrations of industrial land, as shown in the Opportunity Areas in the Suitability Analysis in this report, to identify and protect potential sites for future industrial land expansion.
    - i. Non-industrial uses within industrial sanctuary areas may continue as conforming uses, as permitted under their existing zoning; however, the overlay will impose restrictions on any proposed redesignation to or expansion of non-industrial uses.
    - ii. Increase the availability of large sites and consolidate fragmented parcels through land assembly; facilitate redesignations away from industrial and employment-related land uses when those parcels are not viable for supporting target industry growth.
  - b. Encourage businesses to develop or maintain industrial operations in designated areas.
    - i. Identify and prioritize infrastructure "ready sites" that are equipped with necessary infrastructure, such as roads, utilities, and wastewater management. Duke Energy's Site Readiness Program<sup>13</sup> and Pasco County's Ready Sites

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<sup>13</sup> Duke Energy Site Readiness Program: <https://www.duke-energy.com/partner-with-us/economic-development/site-readiness-program>

Program<sup>14</sup> are examples of programs in which local utilities and economic development organizations maintain an inventory of infrastructure ready sites and market them to prospective businesses.

- ii. Incentivize the development of sites that are not equipped with the necessary startup infrastructure and require significant improvements, commonly referred to as “non-ready sites.” Develop incentive programs for businesses willing to invest in sites lacking full infrastructure that employ the use of tax abatements, grants, low-interest loans, or tax credits to companies that locate on less developed sites and commit to infrastructure development. Partnerships with state and federal programs can leverage additional funding and support for such incentives.
- c. Implement tax disincentives for converting industrial land to other uses in designated areas.
  - i. Implement higher property tax rates for industrial lands converted to non-industrial uses to discourage such conversions.
  - ii. Apply rollback taxes, where any tax savings from a prior industrial designation must be repaid if the land is converted to another use.
  - iii. Increase development impact fees for non-industrial projects proposed on previously designated industrial lands, reflecting the cost of losing industrial job opportunities and the economic benefits it would have generated.

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<sup>14</sup> Pasco County Read Sites Program: <https://pascoedc.com/ready-sites>



### 3.1 Model Comprehensive Plan Goals, Objectives, and Strategies Policy Language

To advance Hernando County action, the TBRPC developed the following model Goal, Objectives, and Strategies language for consideration in future amendments to the Hernando County Comprehensive Plan, Section A. Chapter 3. – Economic Development Element:

#### **Goal 3.05: Maintain Enough Industrial Land to Support a Jobs-to-Employed Residents’ Ratio of 1:1.**

##### **Objective 3.05A: No Net Loss of Target Industry Supporting Land**

- Strategy 3.05A (1):** The County shall provide for a stable inventory of industrial locations through a “No Net Loss of Target Industry Absorption Capacity” policy that limits the conversion of industrial or employment designated land.
- a. Conversions that could result in a decrease in available industrial land must be offset by equivalent increases in industrial land designation elsewhere within the county, ensuring no net loss of industrial land capacity. Exceptions to this policy may only be considered if:
    - i. The industrial property is isolated by more than a mile distance from other industrial properties or is non-viable for target industry uses due to its size, adjacent incompatibility, or environmental constraints.
    - ii. The proposed new use provides significant public benefit and supports broader economic development goals as defined in the Comprehensive Plan.
- Strategy 3.05A (2):** Provide an annual update to the Board of County Commissioners on the remaining inventory of industrial or employment designated land.
- Strategy 3.05A (3):** Establish an annual review mechanism for all policies and strategies related to industrial land use, allowing adjustments based on economic changes, technological advancements, and community feedback.

##### **Objective 3.05B: Establish an Industrial Sanctuary Overlay for Designated Areas on the County’s Zoning Map**

- Strategy 3.05B (1):** Identify clusters of industrial use parcels that can support the development of office parks and industrial parks and include them in an Industrial Sanctuary Overlay Zone. The purpose of the Industrial Sanctuary Overlay Zone shall be to preserve lands currently designated as industrial and to maintain the combined total of available industrial acreage through County or property owner initiated zoning amendments.

**Strategy 3.05B (2):** Identify and address infrastructure needs to support target industry growth in the Industrial Sanctuary Overlay Zone.

- a. Conduct regular assessments to identify infrastructure requirements necessary to support the expansion of target industries.
- b. Evaluate the costs associated with infrastructure development and create competitive strategies to attract and retain target industries in designated areas.

**Objective 3.05C: Incentivize Future Target Industry Development and Employment**

**Strategy 3.05C (1):** Annually review existing policies which prioritize target industry job creation.

- a. Evaluate broadening permitted uses in industrial and commercial districts to promote target industry job growth.
  - i. Assess the potential for a flex industrial Future Land Use designation and corresponding zoning district, that is between a comparable Industrial Light and Industrial Heavy in intensity of allowed uses. These areas can be more accommodating to corporate business parks or qualified target industries, with a minimum of 50-acre sites.
- b. Evaluate existing incentive programs and expedited permitting processes.
  - i. Utilize and promote the EPIC (Expedited Permitting for Industrial and Commercial) program to facilitate timely tenant improvements. Monitor the effectiveness of the EPIC program, provide training and resources to County staff to ensure its successful implementation and operation, and adjust as necessary to ensure it meets the needs of businesses.

**Objective 3.05D: Incentivize Redevelopment of Declining Industrial Sites**

**Strategy 3.05D (1):** Adopt an Industrial Redevelopment Incentive Program

- a. Identify potential redevelopment sites using GIS analysis of underutilized properties, focusing on sites that can be assembled into redevelopment opportunities.

- b. Consider incentives such as permit and fee grants, assistance with identifying contaminated sites, building demolition assistance, exterior and interior building improvement matching grant program funded by tax increment financing or other County sources.<sup>15</sup> Sites that have a Brownfield Site Redevelopment Agreement with the Department of Environmental Protection may qualify for job creation incentives.<sup>16</sup>

**Strategy 3.05D (2):** Establish partnerships with local universities and technical schools to create a pipeline of skilled workers who can support the redevelopment and operational needs of revitalized industrial sites, thus making these locations more attractive to potential investors.

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<sup>15</sup> Hillsborough County a redevelopment incentive program. Some details are here: [hillsboroughcounty.org/library/hillsborough/media-center/documents/economic-development/targeted-redevelopment-area-maps/redevelopment-faq.pdf](https://hillsboroughcounty.org/library/hillsborough/media-center/documents/economic-development/targeted-redevelopment-area-maps/redevelopment-faq.pdf)

<sup>16</sup> [flgov.com/financial-incentives/](https://flgov.com/financial-incentives/)

## Appendix 1. Trends Impacting Industrial Lands More Broadly

The intersection of automation, Artificial Intelligence (AI), the resurgence of American manufacturing, and the shift towards remote work is reshaping the industrial land use landscape. This prompts a consideration of their potential impacts and underscores the need for adjustments in infrastructure and regulations to accommodate anticipated changes in the demand for and utilization of industrial land.

### AUTOMATION AND THE AI REVOLUTION

In a world increasingly driven by technological advancements, Artificial Intelligence (AI) stands out as a transformative force. AI's expanding role in various industries necessitates a deeper exploration of its impact on industrial land use. The surge in AI applications demands robust computing power and extensive data storage facilities, giving rise to the potential need for data centers. Additionally, AI companies and research institutions may seek dedicated industrial land for the establishment of tech parks and research facilities focused on AI development and testing. Automation and artificial intelligence (AI) threaten jobs in many sectors, especially as labor shortages accelerate automation.

Potential Industrial Land Use Impacts:

1. Data Centers: The increased use of AI requires robust computing power and data storage. This can lead to a higher demand for data centers, requiring suitable industrial land for their construction.
2. Tech and Research Parks: AI companies and research institutions may seek dedicated industrial land for tech parks or research facilities focused on AI development and testing.

### REVIVAL OF AMERICAN MANUFACTURING: THE RESURGENCE OF 'MADE IN AMERICA'

Geopolitics is increasingly playing a pivotal role in shaping economic policies and international trade dynamics. Pursuits of self-sufficiency and reduced dependence on rival nations have led to a surge in practices like "friend-shoring" and "onshoring." These strategies are supported through a range of measures, including subsidies, various policy initiatives, visa restrictions, and even the exclusion of companies from specific markets. An example of this is evident in the United States' policies concerning certain high-tech products originating from China.

Concurrently, there is a resurgence of manufacturing activity within the United States, bolstered by new federal incentives aimed at fostering domestic production of critical components like computer chips and electric vehicle (EV) parts. This resurgence has yielded tangible outcomes, with the manufacturing sector adding nearly 800,000 jobs since early 2021, reaching employment levels not witnessed

since 2008. Additionally, U.S. manufacturing employment has surpassed the peak of the previous business cycle, marking the first occurrence of such an achievement since the late 1970s, as indicated by employment data from the U.S. Bureau of Labor Statistics.

Potential Industrial Land Use Impacts:

1. Industrial Facilities: The resurgence of manufacturing, especially in high-tech sectors like semiconductor production, could drive the need for additional industrial facilities and manufacturing plants.
2. Supply Chain Optimization: Companies may require more industrial space for warehousing and distribution to support their domestic manufacturing operations and optimize supply chains.

## REMOTE WORK'S INFLUENCE ON INDUSTRIAL LANDSCAPES

Remote work, characterized by the use of the Internet to bridge the gap between colleagues and workplaces, allows employees to perform their duties for a local business from the comfort of their homes or any connected location. As the COVID-19 pandemic subsides, it is expected that remote work practices, which were initially adopted during office shutdowns, will continue to be a prominent aspect of the contemporary workplace. Consequently, this trend implies that businesses in Hernando can now maintain a workforce that is not bound by geographical constraints, much like any other business in the world can employ residents of Hernando regardless of their physical location. The continued prevalence of remote work is likely to have a multifaceted impact on industrial land demand, with potential shifts in the types of properties needed and their locations.

Potential Industrial Land Use Impacts:

1. Reduced Office Space Demand: With a significant portion of the workforce operating remotely, businesses may require less physical office space. This could lead to reduced demand for traditional office buildings and, subsequently, less demand for industrial land that might have been used for constructing office complexes.
2. Increased Demand for Data Centers: The reliance on remote work and digital communication increases the need for data centers, server farms, and related industrial land to support the robust connectivity required for remote operations. This could result in an increased demand for industrial land suitable for hosting data infrastructure.
3. Shift in Commercial Real Estate: Some commercial properties, especially those located in central business districts, may experience reduced demand due to the decreased need for office space. To further accelerate this trend, the Biden administration initiated a program in October 2023 to convert commercial properties into residential ones. This could potentially lead to repurposing or redevelopment of these properties, impacting the demand for industrial land.



4. Distribution and Logistics: The rise in e-commerce and remote work may drive up the demand for distribution centers and warehouses, as companies seek efficient ways to store and deliver goods. Industrial land in strategic locations for logistics may become more valuable.

## **SYNERGISTIC EFFECTS**

The convergence of emerging technologies and societal shifts creates synergistic effects that have the potential to reshape the industrial landscape significantly. Moreover, the synergistic interplay stimulates economic growth, fostering increased industrial land development to support a wide array of industries and services.

Potential Industrial Land Use Impacts:

1. Tech Hubs: Areas with a confluence of AI development, manufacturing resurgence, and remote work trends may witness the emergence of tech hubs, driving up the demand for industrial land for various purposes, including research, manufacturing, and logistics.
2. Economic Growth: The synergy between these factors can stimulate economic growth, leading to increased industrial land development to support various industries and services.

## **INFRASTRUCTURE AND REGULATORY CONSIDERATIONS**

As the industrial land use landscape undergoes transformation, infrastructure and regulatory considerations play a pivotal role in shaping the future. The interaction between forward-looking infrastructure investments and adaptive regulatory frameworks will be key to effectively navigating the evolving industrial terrain.

Potential Industrial Land Use Impacts:

1. Infrastructure Investment: Adequate infrastructure, such as roads and utilities, will be crucial to support industrial land development in response to these trends.
2. Regulatory Adaptations: Local regulations and zoning laws may need adjustments to accommodate changing land use patterns driven by these trends.

## Appendix 2. Case Study Comparison

Many jurisdictions have been challenged to address industrial land redesignation and supply constraints. To inform this study's recommendations, case studies are included profiling industrial policies in Portland, Jacksonville, and Pinellas County. Although the communities differ, the issues are similar and the solutions those jurisdictions have implemented can serve as references for Hernando County officials.

### 1. PORTLAND, OREGON

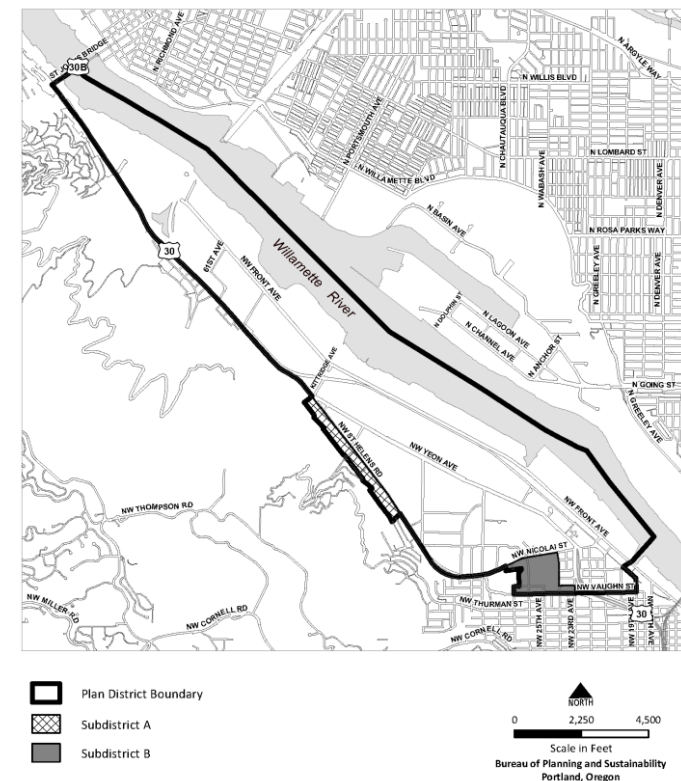
Like Hernando County, Portland Oregon has an industrial base that is vulnerable to pressure for redevelopment to nonindustrial uses. In response, Portland created a first-of-its-kind “Industrial Sanctuary” comprehensive plan policy in 2001 to preserve and protect industrial lands for long-term use. The policy is stated, in part, in Comprehensive Plan Policy 2.14: “Provide industrial sanctuaries. Encourage the growth of industrial activities in the city by preserving land primarily for manufacturing purposes.”

While industrial sanctuaries as a planning concept are referred to by various names in different jurisdictions, the overarching intention is to exclude or limit commercial and/or residential uses from industrial areas as so to remove nonindustrial conversion pressure from them. The goal is to ensure that industrial uses are not forced out of their current locations by nonindustrial uses that can pay more for land or introduce residents who would complain about the real or perceived negative effects of industry.

Portland has six “employment” zones, of which three are specifically industrial oriented and make up the greater industrial sanctuary for the city:

1. General Industrial 1 (IG1) – These areas have smaller lots and a grid block pattern. Sites have high building coverages and buildings which are usually close to the street. IG1 areas tend to be the City's older industrial areas.

FIGURE 18. PORTLAND INDUSTRIAL SANCTUARY



2. General Industrial 2 (IG2) – These areas have larger lots and irregular or large block patterns. The areas are less developed with sites having medium and low building coverages and buildings set back from the street.
3. Heavy Industrial (IH) – This zone provides areas where all kinds of industries may locate, including those not desirable in other zones due to their objectionable impacts or appearance. Development standards are the minimum necessary to assure safe, functional, efficient, and environmentally sound development.

The three other employment zones allow for business and commercial uses to support a wide range of services and employment opportunities. These are:

1. General Employment 1 (EG1) - These areas have smaller lots and a grid block pattern.
2. General Employment 2 (EG2) - These areas have larger lots and an irregular or large block pattern.
3. Central Employment (EX) – This is a mixed-use zone for center-city areas that have predominantly industrial type development. The intent of the zone is to allow industrial, business, and service uses that need a central location. Residential uses are allowed but are not intended to predominate or set development standards.

In terms of use restrictions, the industrial sanctuary is more stringent, restricting new retail and non-industrial supportive office development, prohibiting most institutional uses, and disallowing residential uses. While the industrial sanctuary rules limit non-industrial uses, the sanctuary loosens development restrictions for industrial uses, designating no height or floor area ratio restrictions for industrial redevelopment. Additionally, the industrial sanctuary establishes “Freight Districts,” providing requirements on street widths and capacity to accommodate truck movement throughout the districts.

To address modern trends in industrial uses, “Employment Opportunity Subarea” overlay zones within the industrial sanctuary permit industrial office space that can support “creative service” businesses such as Internet sales, software design/production, web page design and production, advertising, and video production. This strategy suggests that some types of businesses with both industrial and office characteristics may be more compatible with industrial uses rather than traditional office uses, recognizing that offices with manufacturing or production components have different spatial and economic needs than traditional office uses. Portland chose to encourage such offices in near-downtown industrial zones because these areas contain many older manufacturing structures no longer appropriate for new industrial uses.

## 2. JACKSONVILLE, FLORIDA

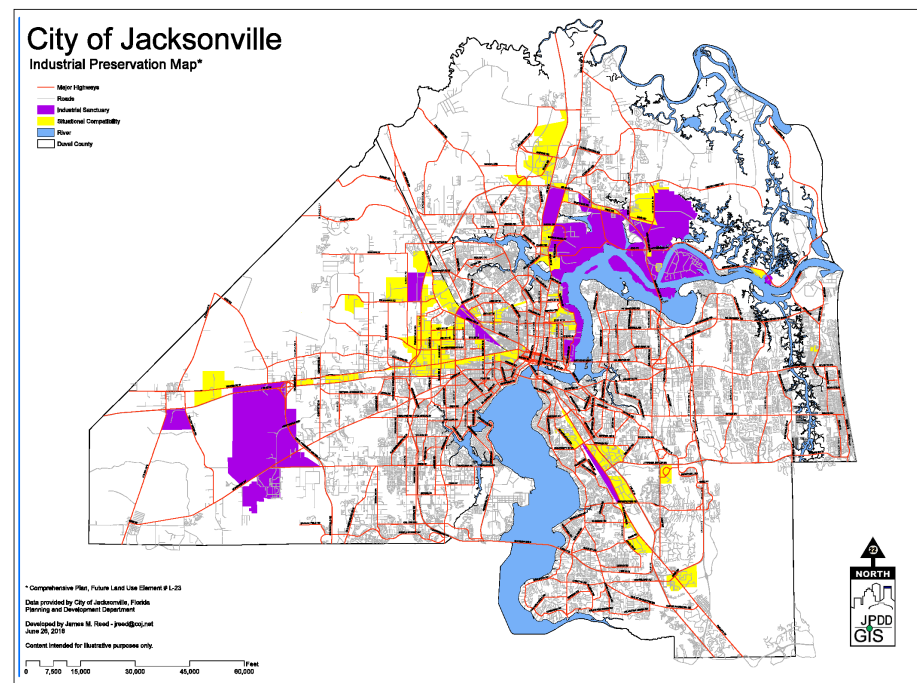
Development pressures in the City of Jacksonville have led to increased comprehensive plan amendments requesting the conversion of industrially designated lands to other uses. Like Portland, Jacksonville's response to this issue makes use of the industrial sanctuary concept; however, with a variation to accommodate mixed use developments with buffer requirements when deemed necessary.

The Future Land Use Element of the City of Jacksonville 2030 Comprehensive Plan states that "in order to maximize the economic potential of industrial development, and to minimize the adverse impacts on other types of land uses, it is necessary to identify geographic areas suitable for various types of industry based on such factors as the labor force, accessibility to specific modes of transportation, need for expansion, and amenity factors for the labor force." This policy is implemented through the creation of two industrial preservation overlay zones, delineated on Map L-23 (Figure 20) as the Industrial Sanctuary Overlay Zone and the Area of Situational Compatibility Overlay Zone.

In this context, industrial sanctuaries consist predominately of industrial uses and zoning districts that are strategically located for future expansion and economic development. The overlay's purpose is to protect and preserve the area from premature fragmentation by intrusive residential and commercial uses and promoting the expansion of industrial uses within the area. Unless there is an adopted neighborhood plan or study recommending the contrary, industrial sanctuary lands cannot be converted to non-industrial land uses. In comparison, Areas of Situational Compatibility may be suitable for industrial uses under certain circumstances. Most notably, the conversion of industrial lands within these areas can only be permitted for construction of mixed-use development consistent with the requirements for job creation. This policy ensures that any conversion of industrial lands results in mixed use developments that can support the city's industrial base, such as target industry business/office parks.

In addition, buffer requirements are used to discourage conversions of industrial lands and to maintain sufficient buffers between compatible and incompatible land use.

FIGURE 19. CITY OF JACKSONVILLE INDUSTRIAL PRESERVATION ZONES



Source: City of Jacksonville, Florida

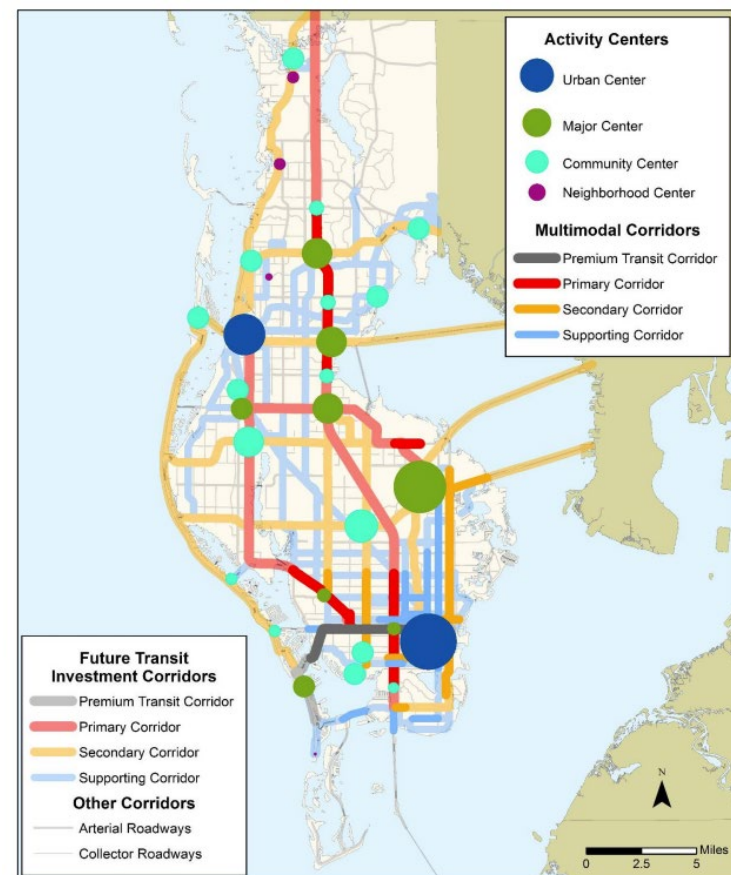
The buffer areas may consist of rights-of-ways, passive recreation, underground utilities, off-street parking spaces and parking garages, stormwater retention, landscaping, visual screening, wetlands, and other conservation lands. In Industrial Sanctuaries, proposed commercial developments are subject to buffers of 50 feet for standard commercial areas and 100 feet for commercial-office mixed areas. Residential uses, depending on their density, can be permitted if more stringent buffers are maintained. For example, a 300-foot buffer for single family residential development or a 200-foot buffer for multifamily developments. In Areas of Situational Compatibility, the buffer requirements are less stringent. For example, 100 feet buffers are required for single family residential developments and 50 feet buffers for multifamily developments.

### 3. PINELLAS COUNTY, FLORIDA

Pinellas County is a densely populated county with limited available land for new development countywide. Target employment lands are vital components to attracting and retaining target employers, and historically, pressure has been placed on these lands to convert to other uses. Unlike Portland and Jacksonville, Pinellas County has developed an approach to preserving its target employment lands that does not utilize industrial sanctuaries but instead relies on a comprehensive suitability/conversion criterion.

Pinellas County has three land use classifications directly related to industrial and employment uses: Employment (E), Industrial General (IG), and Target Employment Center (TEC). Each classification identifies permitted primary and secondary uses that support target industries and broaden the range of employment opportunities, locational characteristics, and development standards, many of which are common and overlap across land use classifications. The general distinction between these classifications is that E prioritizes light manufacturing and office spaces, as well as a range of residential uses in appropriate amounts and configurations that support employers but do not compete with them; whereas IG prioritizes heavier industrial uses and only permits accessory residential dwellings. The third land use classification, TEC, is an overlay classification that applies a 100 percent floor area ratio (FAR) bonus to increase the intensity of manufacturing, office, and research/development uses within the underlying plan categories.

FIGURE 20. PINELLAS FUTURE TRANSIT INVESTMENT CORRIDORS



Source: Forward Pinellas Countywide Plan

The Countywide Plan, created by Forward Pinellas with input from the 25 local governments within Pinellas County, establishes general rules for land uses and includes a Countywide Plan Map designating where certain types of development can occur within the county. Local governments are required to maintain future land use plans and maps that are consistent with the Countywide Plan. The Pinellas Countywide Plan Strategy Map (Figure 21) directs higher-density redevelopment into a network of transit-oriented centers and corridors, preserving land needed to support employment and limiting growth in areas vulnerable to coastal flooding. In Pinellas County, development rights may be transferred from areas designated for preservation or natural resource management to other locations throughout the County. To support industrial land preservation, the development rights of natural preservation areas can transfer to lands more suitable for employment generating uses, for example, to appropriate activity centers and transportation corridors identified on the Countywide Plan Strategy Map.

Plan Pinellas, Pinellas County's 2022 Comprehensive Plan draft update, requires a variety of factors be taken consideration in requests for land conversion, including potential site and locational advantages, how the property fits into the broader transportation and infrastructure system, whether it is included within previous plans, what unique features may affect the property, and how the proposed development may impact the local economy through the number and types of jobs and wages that will be created. Future Land Use Strategy 4.1.2.1, included below, will guide staff when making recommendations to approve or deny planning application requests:

1. Site Characteristics: the size, configuration, and physical characteristics of the site, including potential for expansion or consolidation with adjoining properties, in relationship to its potential utility to support employment opportunities.
2. Locational Characteristics: the location of the property in relationship to adjoining similarly classified property, its compatibility with adjoining and nearby uses and plan classifications that would be like or serve the site, and any adjoining residential or incompatible use or plan category.
3. Transportation and Infrastructure Features: the location of the property in relationship to arterial and major highways, public transit, airport, and rail access, as well as other infrastructure and service facilities, including water, sewer, stormwater, solid waste, and parking, and their respective capacities.
4. Unique Features: whether the property is now, or is proposed to be, used for unique and high-priority functions such as water-dependent, working waterfront, runway access, and transit-oriented uses.
5. Contribution to the Economy: the number and type of jobs, and corresponding wage scale(s), to be provided within the proposed plan designations as compared to those now provided, or potentially available, within the existing plan category.
6. Redevelopment Plans: whether the property is included as part of a special area plan or other community plan that has evaluated and addressed the effect on the number and type of jobs and wage scale of persons to be employed in the redevelopment area proposed to be reclassified.
7. Related Comprehensive Plan Policies: whether the amendment furthers key policies of the comprehensive planning process, consistent with the County's Comprehensive Plan, to enhance the manufacturing, high-tech and targeted industry employment base.



## CASE STUDY SUMMARY

The case studies provided illustrate a variety of approaches to industrial land preservation:

1. In Portland, the industrial sanctuary presents a clear strategy for the protection and expansion of industrial uses, restricting non-industrial uses and loosening development restrictions for height and floor area ratio for within sanctuary zones.
2. In Jacksonville, a similar approach is taken with a variation to accommodate hybrid live-work developments, where the conversion of industrial lands within “Areas of Situational Compatibility” can only be permitted for construction of mixed-use development consistent with the requirements for job creation, and residential development is permitted with appropriate buffers to maintain compatibility between uses.
3. In Pinellas, a densely populated and largely built-out county, mixed use development is common across industrial zones, intensity bonuses and transfer of development rights are used to incentivize industrial uses and accommodate more jobs on less lands, and land use decisions are made in alignment with a Future Transit Investment Corridor framework.

## Appendix 3. Hernando County Current Economic Development Incentives

Florida Commerce and Hernando County offer several economic development incentives and grants to encourage the relocation, expansion, and retention of a qualified workforce for businesses. A brief description of these programs is outlined to provide a more complete understanding of the kinds of financial tools that can be utilized where there may be gaps or opportunities for additional techniques, as described in Chapter 3.

Economic Development Investment Incentive Program: The Economic Development Investment Incentive Program (EDIIP) provides grants to new or expanding businesses with targeted industry commercial projects that increase the tax base, create new employment opportunities, and make a significant capital investment. Targeted industries include aviation, aerospace, manufacturing, distribution/logistics, back-office operations, research & development, and corporate relocations.

Expedited Permitting, Inspection and Certification: The Expedited Permitting, Inspection and Certification (EPIC) program facilitates an accelerated permitting and inspection process to obtain the Certificate of Occupancy. The EPIC Program aims to enable companies expanding or relocating to Hernando County to build necessary facilities and infrastructure within a timeline aligned with company goals and deadlines.

Building Permit and Impact Fee Mitigation: Any industry or business certified as a targeted industry (TI) by the Office of Business Development is potentially eligible for the mitigation of its building permit and impact fees, which could save TI businesses thousands of dollars. If the industry, through new development, redevelopment, or expansion, creates at least ten new full-time jobs within the county, each with a salary equal to or higher than the county's average annual wage, it can apply to the Office of Business Development. If approved, the business can have up to 100% of its building permit fees deferred for seven years. At the end of this deferral period, all the building permit fees that were deferred will be forgiven by the county, provided the targeted industry still meets all the original eligibility requirements for a targeted industry.

Tax Exemptions <sup>17</sup>: The Semi-conductor Defense and Space Technology Tax Exemption supports technology-based companies investing in critical advanced technology, machinery, and equipment to support the productivity, retention, and growth of high-value, high-wage industries. Semi-conductor, defense, and space technology production companies can apply for a sales tax exemption permit within two years of purchasing machinery and equipment. The tax exemption allows businesses to bid on government defense and space contracts and must keep overhead costs low.

Tax Credits: The Capital Investment Tax Credit in Florida's High Impact Sectors, as defined by Florida Statutes, is used to attract, and grow capital-intensive industries in Florida: defined as industries such as clean energy, biomedical technology, financial services, information technology, silicon technology, transportation equipment manufacturing, or a corporate headquarters facility. This annual tax credit provides for up to 20 years of relief against the corporate income tax, incentivizing investment, and growth within these critical industries.

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<sup>17</sup> "Types of Incentive Awards." Types of Incentive Awards - FloridaJobs.Org, [www.floridajobs.org/office-directory/division-of-economic-development/economic-development-incentives-portal/types-of-incentive-awards](http://www.floridajobs.org/office-directory/division-of-economic-development/economic-development-incentives-portal/types-of-incentive-awards). Accessed 11 Jan. 2024.

## Appendix 4: Economic Impact Methodology

### DEFINITIONS

Hernando County Target Industries: Hernando County Economic Development as Target Industries, which forms the focus of this study's employment impacts. These industries include, but are not limited to:

1. Manufacturing
2. Aerospace, Aviation, & Defense
3. Logistics and Distribution

This list of industries informed a narrowing down of focus into certain 3-digit NAICS codes in the REMI Model. These industries are sometimes presented collectively in the following results section as 'Target Industries.' See Table 18 for a full list and summary.

Employment: Employment comprises estimates of the number of jobs, full-time plus part-time, by place of work for all industries. Full-time and part-time jobs are counted at equal weight. Employees, sole proprietors, and active partners are included, but unpaid family workers and volunteers are not included. These only consider jobs within the boundaries of Hernando County.

Residence-Adjusted Employment: Using commuter income flow data from the US Census American Community Survey (ACS), REMI calculated the number of working people who live in Hernando, regardless of where they are working. This figure will differ from Employment overall.

Jobs-Employed Resident Ratio (JER ratio): The JER ratio represents the number of employed residents of a county as compared to the number of jobs in the geographic area of the county. A ratio of less than one indicates that residents are net out-commuters, while a ratio higher than one indicates that there are in-commuters supporting a region's total employment level. This serves as a useful measure of the robustness of an area's economy compared to its population level.

Job-years: The REMI model produces employment levels in terms of job-years, rather than individuals employed. A job-year is one person being employed at a position for one-year. This is usually equivalent to employment but can obscure minute employment details. For example, one person employed in a particular industry for ten years would appear in the same results as ten different individuals working in that same industry for one year.

Labor Force: REMI calculates labor force for each region through multiplying age-specific participation rates. This can differ from employment due to being a model calculated figure at all time horizons.

TABLE 18. ECONOMIC SUMMARY OF HERNANDO COUNTY SELECTED TARGET INDUSTRIES

NAICS	TARGET INDUSTRIES BY NAICS CODE	EMPLOYMENT (INDIVIDUALS)	AVERAGE 2022 WAGE RATE (DOLLARS)	TOTAL VALUE OF GOODS AND SERVICES / OUTPUT (DOLLARS)
115	Support activities for agriculture and forestry	273	\$18,364	\$4,906,621
211	Oil and gas extraction	13	\$0	\$956
212	Mining (except oil and gas)	51	\$18,194	\$8,270,618
213	Support activities for mining	2	\$72,775	\$142,346
22	Utilities	123	\$97,698	\$25,330,373
321	Wood product manufacturing	38	\$58,962	\$12,550,372
327	Nonmetallic mineral product manufacturing	1,273	\$33,471	\$277,813,491
332	Fabricated metal product manufacturing	383	\$63,862	\$96,893,151
333	Machinery manufacturing	242	\$82,698	\$100,449,493
334	Computer and electronic product manufacturing	193	\$118,796	\$47,424,538
335	Electrical equipment, appliance, and component manufacturing	132	\$70,302	\$32,199,389
3361-3363	Motor vehicles, bodies and trailers, and parts manufacturing	1	\$23,516	\$240,299
3364-3369	Other transportation equipment manufacturing	32	\$107,273	\$8,709,530
337	Furniture and related product manufacturing	21	\$48,783	\$3,927,510
339	Miscellaneous manufacturing	300	\$68,680	\$82,423,110
311	Food manufacturing	140	\$53,905	\$62,408,588
312	Beverage and tobacco product manufacturing	11	\$69,702	\$8,722,133
313-314	Textile mills; Textile product mills	9	\$47,907	\$1,651,903
315-316	Apparel manufacturing; Leather and allied product manufacturing	9	\$30,455	\$751,824
322	Paper manufacturing	1	\$40,224	\$303,116
323	Printing and related support activities	26	\$53,174	\$6,132,045
324	Petroleum and coal products manufacturing	7	\$78,231	\$7,300,819
325	Chemical manufacturing	43	\$81,426	\$30,292,524
326	Plastics and rubber products manufacturing	34	\$64,869	\$12,772,782
481	Air transportation	1	\$0	\$32,435,078
482	Rail transportation	15	\$135,090	\$7,474,206
483	Water transportation	1	\$0	\$433,596
484	Truck transportation	1,246	\$31,273	\$264,265,911
486	Pipeline transportation	1	\$0	\$94,416
493	Warehousing and Storage	1,473	\$60,917	\$201,831,342
	<i>All Industries</i>	<i>71,347</i>	<i>\$37,514</i>	<i>\$10,829,582,728</i>

Source: TBRPC's REMI PI+ V 3.0 Model of Tampa Bay Counties, 2022.

## METHODOLOGY

TBRPC staff collected population, employment, land use, wage, and other relevant economic and demographic information on Hernando County from TBRPC's REMI model of the county, IMPLAN, Census, Bureau of Labor Statistics and other sources cited where relevant. Using this data, staff performed several transformations and calculations to prepare the scenarios for entry into the modeling software.

Using the REMI PI+ economic model's baseline projection of future Hernando County growth, TBRPC staff produced three scenarios that consider the long-term economic impacts of industrial land use decisions. The projected forecasts are reported as cumulative differences in economic indicators from an underlying baseline forecast through 2050. The results reported in the main section should not be considered definitive. They are "if-then" style estimation of three potential futures which Hernando County could aim towards achieving given their goals.

Those three scenarios are outlined below:

1. **A decline in Hernando County JER from 0.8 to 0.7.** This scenario models a shift towards residential development, or a decline of employment land uses going into the future.
2. **A maintenance of Hernando County JER at 0.8.** This scenario models the County desiring to keep its current mix of land uses and employment levels.
3. **An increase of JER to 1.** This scenario models a coordinated effort of Hernando County and the business community to ensure that there is a job within Hernando County for each working resident.

Firstly, staff calculated employment impacts based on the Jobs-Employment (JER) ratio as it stands at 0.79 based on existing Hernando County employment as compared to Hernando Jobs.

For **Scenario 1**, using the existing jobs data by year staff adjusted the figures to match a 0.7 ratio of jobs to employed residents from 2023 to 2050. Subtracting the predicted forecast values from these newly calculated 0.7 JER values provided the inputs for the final analysis. Staff input these changes from the baseline as policy variable inputs to industry employment in Hernando, respecting the 9.9 percent mix of target industry employment (as do all scenarios). This is an economic decline scenario.

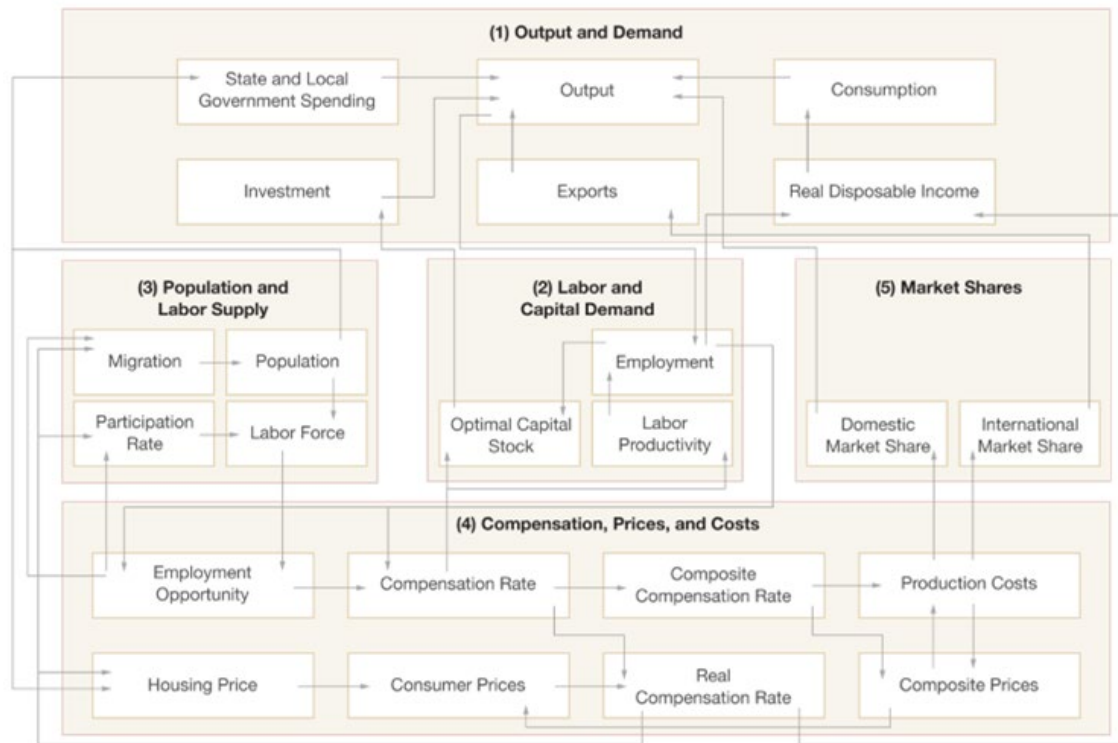
For **Scenario 2**, the most recent Census data in 2020 had Hernando County's JER at 0.8, which became the benchmark for Scenario 2. The assumption being that the slip to 0.79 was influenced by the pandemic and is achievable without too much change in overall strategy. This is the middle impact scenario.

For **Scenario 3**, as in the first scenario staff used the existing jobs figures and adjusted them to achieve a JER of 1 from 0.8 by 2050. The difference between the 'business-as-usual' timeline jobs figures and the newly created JER 1 figures became the inputs to the REMI model. This is the economic increase scenario.

## REMI PI+ MODEL OVERVIEW

TBRPC staff presents the REMI result data in curated tables and create charts and figures throughout the report. REMI models are widely used economic impact software and are a common aspect of economic impact studies in the State of Florida. See Figure 22 below for a general equation structure of REMI PI+. Those impacts were cross-checked with IMPLAN and ESRI Business Analyst to refine estimates.

FIGURE 21. REMI PI+ MODEL EQUATION FIVE-BLOCK STRUCTURE



The REMI model uses inputs known as policy variables as inputs for a user to employ when conducting an impact analysis. These policy variables are spread across the above outlined five-blocks, and each has a particular best-practice use case. Modelers can use multiple policy variables in tandem to model complex or unusual scenarios, e.g., a new firm entering a region which pays its employees differently than average and expects a different level of labor productivity.



## Appendix 5. Land Suitability Analysis & Methodology

### INDUSTRIAL AND OTHER LANDS INVENTORY

**Objective:** Determine the total amount of current industrial lands within the Hernando County parcel record. Additionally, evaluate zoning and Future Land Use (FLU).

**Data and Methods:** The following source data was used for the industrial lands inventory:

TABLE 19. MAPPING SOURCES

Name	Format	Source	Vintage
county boundary	.shp	Hernando County	7/14/2023
city boundary	.shp	Hernando County	7/14/2023
county FLU	.shp	Hernando County	7/14/2023
Brooksville FLU	.shp	Hernando County	7/14/2023
parcels	.shp	Hernando County	7/14/2023
zoning	.shp	Hernando County	1/3/2024

The parcels GIS shapefile was used to determine current industrial lands by the Florida Department of Revenue (DOR) Property Use Codes. The following DOR codes were selected by Hernando County Economic Development staff from a document entitled Hernando County Property Appraiser DOR Property Use Codes. Note: There are small semantic differences between the DOR descriptions in this document and the parcels GIS shapefile.

TABLE 20. THE FLORIDA DEPARTMENT OF REVENUE (DOR) PROPERTY USE CODES

DOR Code	DOR Property Use Description
20	Airports, bus term, marinas,
40	Vacant industrial
41	Light manufacturing
42	Heavy industrial, heavy equip
43	Lumber yards, sawmills
44	Packing plants, fruit & vege
45	Canneries, fruit & vegetable
46	Other food processing, candy
47	Mineral processing, phosphate
48	Warehousing, distribution
92	Mining

Note: DOR code 46 was not found in the parcel.shp.

Acreage was calculated in GIS to eliminate the risk of inconsistent parcel size attribution.

TABLE 21. MAPPING RESULTS BY NUMBER OF PARCEL AND ACRES

DOR Code	DOR Property Use Description	Parcel Count	GIS Acres
20	Airports	8	989.6
40	Industrial Vacant Land	46	515.9
41	Light Manufacturing	48	174.1
42	Heavy Industrial	5	38.2
43	Lumber Yards	2	12.1
44	Packing Plants	1	3.8
45	Canneries, fruit & veg., bottlers & brewers distil	1	1.0
46	Other Food Processing, Candy	0	0
47	Mineral Processing	8	1895.3
48	Warehousing	225	703.2
92	Mining, petroleum, or gas lands	60	3639.4

**Objective:** Determine what locations in Hernando County offer suitable conditions for development marketed to target industries.

- Target industries:
  - Aviation
  - Light Manufacturing
  - Warehousing (note: “Warehousing” is referred to by the Department of Revenue as “Warehousing, Distribution”)
- Suitability Considerations
  - Access to transportation (rail and truck routes)
  - Proximity to similar land uses
  - Conservation Lands
  - Environmental Hazards
  - Vacant/undeveloped land

**Data and Methods:** The following source data was used as the base data for the suitability analysis.

1. Access to transportation (rail and truck routes): 1,000-foot buffers were created for both rail and truck routes. The buffers extended 1,000’ on either side of transportation centerlines.
2. Proximity to similar land uses: 1,000-foot buffers were created to surround existing industrial lands.
3. All transportation and land buffers were merged to create a generalized area of suitability.
4. Conservation Lands: These lands were selected from the Brooksville and Hernando County Future Land Use (FLU). Any lands within these conservation areas were excluded from analysis.
5. Environmental Hazards: Lands within the Coastal High Hazard Area (CHHA) were excluded from the analysis.
6. All conservation lands and the CHHA were merged to create lands to screen out of the analysis.
7. The screen out areas were then erased from the suitability buffers.
8. Vacant/undeveloped land: All vacant lands, including commercial, governmental, institutional, and residential, were selected from the parcels file.
9. Vacant lands were then compared (intersecting and clustering) with the remaining interim suitability areas.
10. These remaining lands were then spot checked against current industrial uses that matched target industries (aviation, light manufacturing, and warehousing).

TABLE 22. DATA SOURCE FOR VACANT LANDS ASSESSMENT

File name	Extension	Source	Vintage
county FLU	.shp	Hernando County	7/14/2023
brooksville FLU	.shp	Hernando County	7/14/2023
parcels	.shp	Hernando County	7/14/2023
CHHA	.gdb	FDEM	8/20/2021
Designated Roads	.gdb	FDOT	11/2/2023
National Map Railroads	.gdb	USGS	9/27/2022

**Observations:**

1. Hernando County offers many transportation advantages to support industrial use.
2. Many of the largest current industrial parcels are used for mineral processing and mining, which are not considered targeted industries.
3. The Brooksville – Tampa Bay Regional Airport offers an abundance of vacant land opportunities, which is why the county has designated the area a Planned Development District.
4. Vacant parcels are sporadic and when they are contiguous, they are often small.

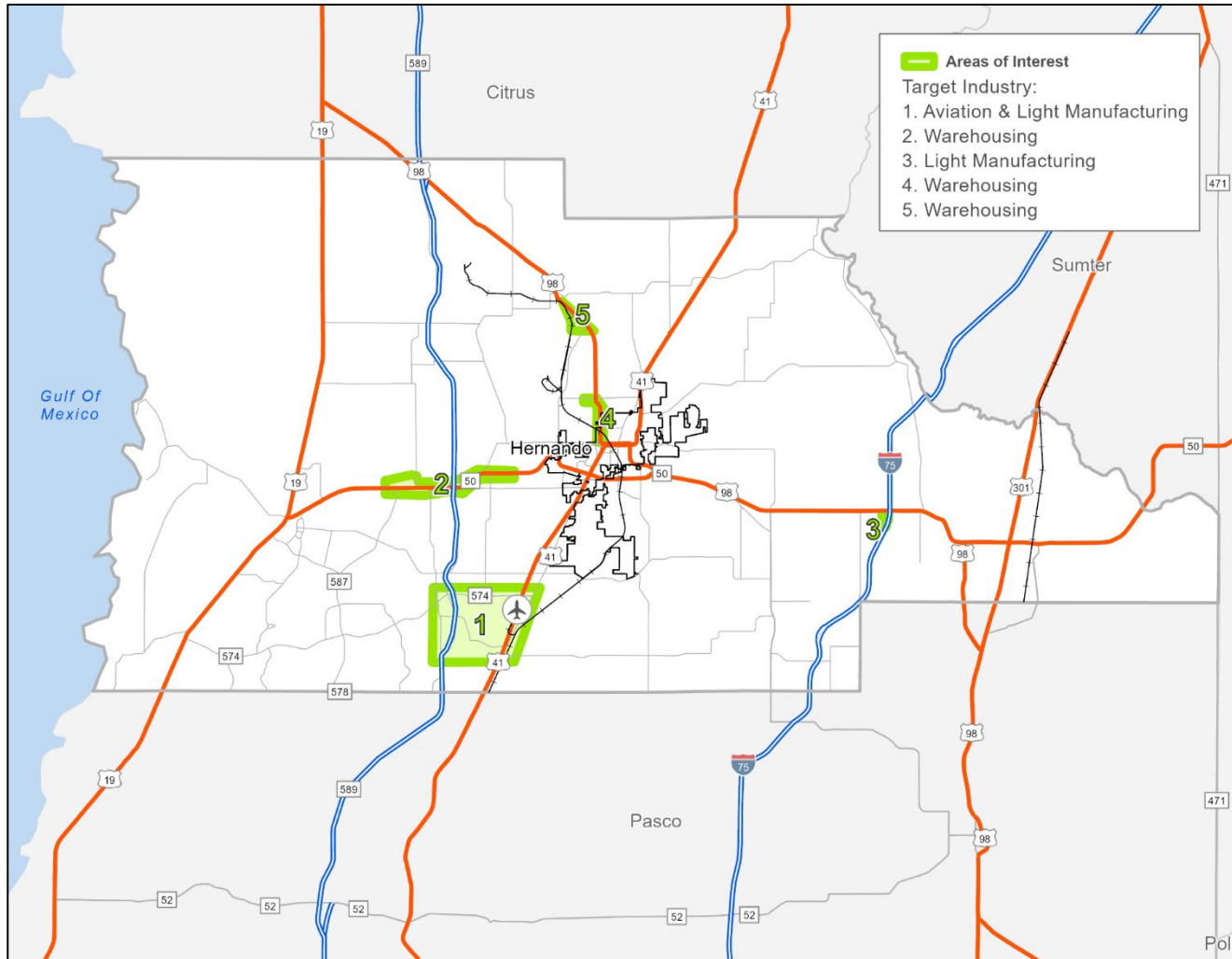
**Results:**

TABLE 23. VACANT INDUSTRIAL LANDS OF TARGETED INDUSTRIES BY ACREAGE

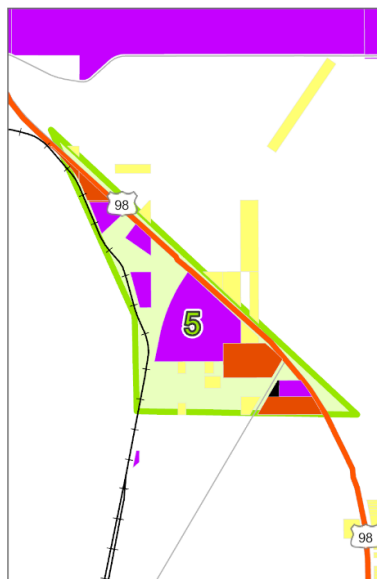
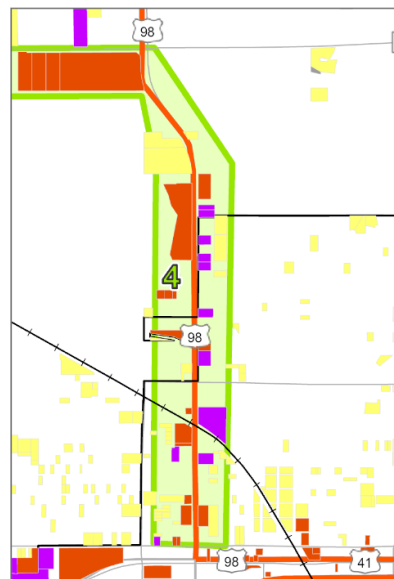
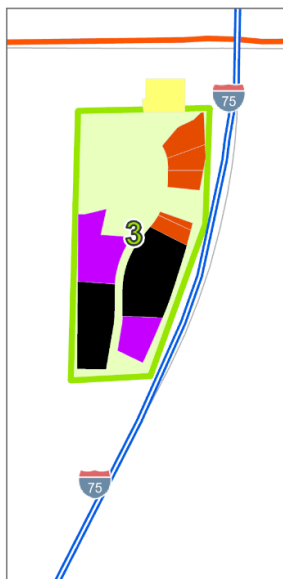
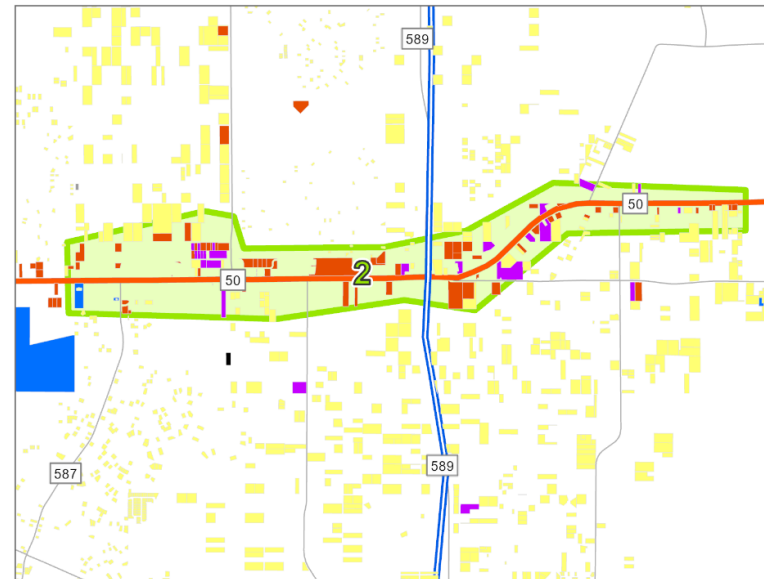
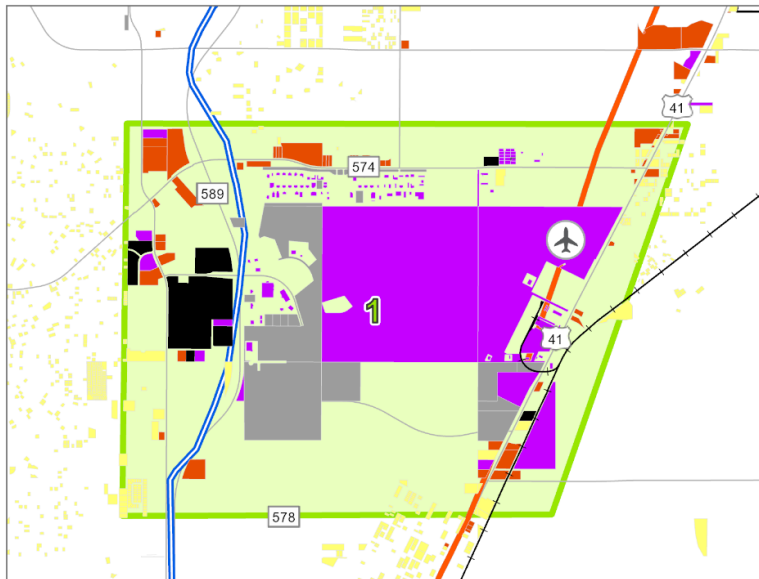
AOI #	Target Industry	Vacant Industrial Acres	Other Vacant Land Acres	Total Vacant Acres in AOI
1	Aviation and Light Manufacturing	163	757	920
2	Warehousing	0	239	239
3	Light Manufacturing	13	8	21
4	Warehousing	0	70	70
5	Warehousing	1	45	46

The suitability analysis resulted in five areas of interest (AOIs), which the county can consider for redevelopment for targeted industries. These AOIs offer access to industrial friendly transportation options. The AOIs fall outside conservation lands and environmental hazards analyzed. And the AOIs capture vacant lands which are adjacent or near current industrial uses.

FIGURE 22. CURRENT AREAS OF INTEREST FOR TARGET INDUSTRIES



Data Source: Hernando County GIS, 2023. Map by TBRPC.



- Areas of Interest
- Vacant Industrial
- Current Industrial Lands In Use
- Vacant Residential
- Vacant Commercial
- Vacant Institutional
- Vacant Governmental

- Target Industry:
1. Aviation & Light Manufacturing
  2. Warehousing
  3. Light Manufacturing
  4. Warehousing
  5. Warehousing

Note: Maps Not Scaled Consistently

Data Source: Hernando County GIS, 2023. Map by TBRPC.



