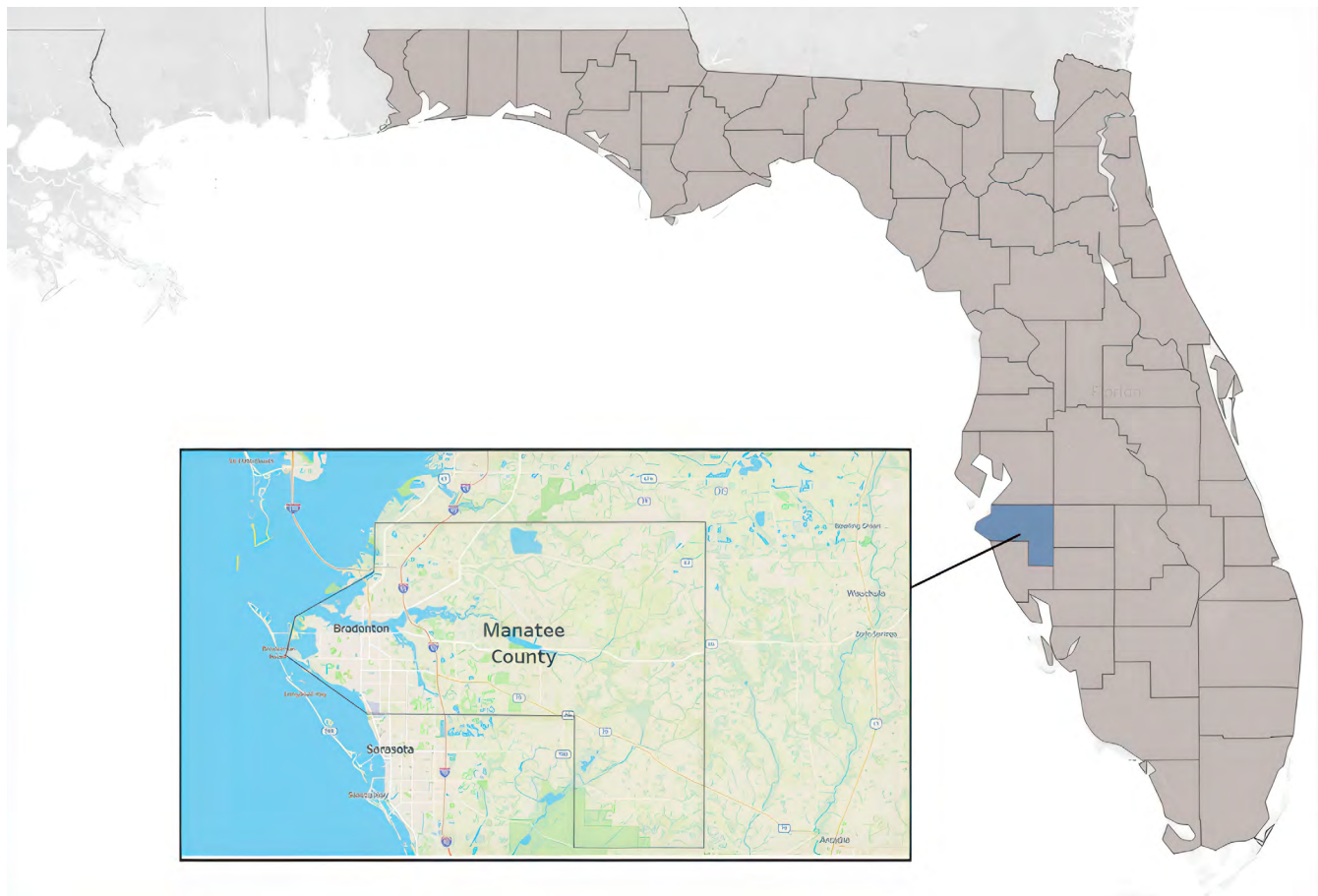


Assessing Impact Fees in the City of Bradenton and Manatee County, Florida 2024-2025

Figure 1. Map of the City of Bradenton and Manatee County, Florida



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Overview

This 2025 James Madison Institute (JMI) profile “Assessing Impact Fees in the City of Bradenton and Manatee County, Florida: 2024-2025” serves as a complement to the JMI backgrounder report “Assessing Florida Local Government Impact Fees: 2024-2025.” This profile provides a closer analysis of local impact fees beginning with a brief overview of the demographic and economic context. This is followed by a brief discussion of permitting and administrative fees associated with residential development as well as general permitting and fee revenue trends. Next, up-to-date impact fee schedules are presented and analyzed detailing the facilities for which fees are charged, the structure of the fee schedule including maximum and minimum fee ranges in dollar amounts, and any recent fee schedule changes. Fee schedules are also evaluated for regressivity in terms of the potential impact of fee burdens on the affordability of single-family homes for households earning below, at, or above the county’s area median income (AMI). For consistency, this profile assumes that all single-family residential developments analyzed are not eligible for fee waivers or reductions, which some local governments offer for affordable housing projects. This profile concludes with key takeaways that summarize the findings and highlight noteworthy trends.

Introduction

Manatee County, located in Southwest Florida, had an estimated population of 441,095 in 2023, reflecting an approximate ten percent increase since 2020. Seniors make up about a quarter of the population. The median household income in the county is \$71,385, with a poverty rate around ten percent. Manatee County’s median home value is \$323,900.

Table 1. Population, Median Income, and Median Home Value in Manatee County and the City of Bradenton, Florida

COUNTY	POPULATION ESTIMATE*	POPULATION GROWTH % (2020-2023)	POPULATION OVER 65	MEDIAN HOUSEHOLD INCOME**	POVERTY (PERSONS) %	MEDIAN HOME VALUE***
Manatee County	441,095	9.8%	117,425	\$71,385	10.4%	\$323,900
City of Bradenton	56,289	1.1%	15,151	\$55,795	14.2%	\$252,400

*2023 population data is from the U.S. Census, Population Division, Annual Estimates of the Resident Population for Counties in Florida: April 1, 2020 to July 1, 2023 (CO-EST2023-POP-12).

Median household income data is from the U.S. Census, 2022 American Community Survey 5-Year Estimates, S1901 Income in the Past 12 Months (in 2022 Inflation-Adjusted Dollars), [https://data.census.gov/table?q=median+household+income+2022&g=040XX00US12\\$0500000](https://data.census.gov/table?q=median+household+income+2022&g=040XX00US12$0500000)*Median home value data is from the U.S. Census, 2022 American Community Survey 5-Year Estimates, DP04 Selected Housing Characteristics at [https://data.census.gov/table/ACSDP5Y2022.DP04?q=median+home+value+ng=040XX00US12\\$0500000&moe=false](https://data.census.gov/table/ACSDP5Y2022.DP04?q=median+home+value+ng=040XX00US12$0500000&moe=false).

The City of Bradenton, located within Manatee County, charges impact fees for roads, parks, and public safety. Bradenton had an estimated population of 56,289, reflecting an approximate one percent increase since 2020. Seniors make up about a quarter of the city’s population. The City of Bradenton has a median household income of \$55,795, with a poverty rate of about 14 percent. The City of Bradenton’s median home value is \$252,400.

Permitting and Administrative Costs

Manatee County’s permitting and administrative fees are detailed on their county website. Below is a table of some of the fees that apply to new construction of single-family residential homes effective 04/01/2023. As in every county, the amount of the fee depends on the features of the development and the specifics of their application process.

Table 2. Key Permit and Administrative Costs Excluding Impact Fees

FEE DESCRIPTION:	FEE AMOUNT:
New Residential Structure Building Permit	\$0.27 per square foot
Residential-Occupying Structure Inspection Fee	\$193
Master Plan Review	\$158
Private Plans Review and Inspection Fee	\$260

Source: “Development Services.” 2024. Mymanatee.org. 2024.

Accessed December 11, 2024

https://www.mymanatee.org/departments/building_development_services.

Figure 2. Manatee County Permits Issued: 1993 - 2022



Source: U.S. Department of Housing and Urban Development.

Figure 3. Manatee County Reported Impact Fee Revenue: 1993 - 2022



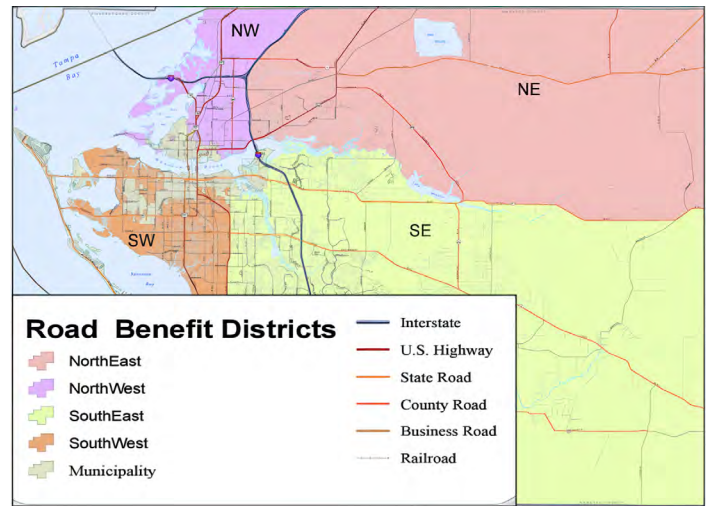
Source: FL Office of Economic and Demographic Research

Permitting activity (see Figure 2) and impact fee revenue (see Figure 3) over the past two decades for Manatee County show some similar patterns, with the mid-2000s boom coinciding with sharp declines in permitting and subsequently revenue following 2008. During 2022, the number of permits issued and impact fee revenue collected are at their peak. In 2022, Manatee County collected over \$47,000,000 in fees amounting to over 2.5 times the previous \$17,000,000 peak back in 2006.

Impact Fees in Manatee County

The impact fee schedule for Manatee County can be found on the county’s website or in the county’s land development code. The county charges residential impact fees to single-family homes, townhomes/duplexes, multi-family homes, and manufactured homes. Before November 2023, fees were collected at 90% of the fee schedule put forth by the county’s 2015 impact fee study.¹ Fees are now collected at the full rate. The county charges residential developments impact fees for law enforcement, libraries, multi-modal transportation, parks and natural resources, public safety, and educational facilities. Multi-modal impact fees depend upon the specific transportation benefit district in which a new development is located, as shown in the accompanying district map (see Figure 4).

Figure 4. Multimodal Transportation Benefit Districts



Source: Manatee County Multimodal Transportation Benefit Districts “Multimodal Transportation Benefit Districts.” 2021. Mymanatee.org. 2021. Accessed December 11, 2024 https://www.mymanatee.org/departments/building_development_services/impact_fees/multimodal_transportation_benefit_districts.

Table 3 displays the county’s most recent fee schedule (effective January 2025), which brought several notable changes, including tying educational facility fees to a home’s size and introducing a new square footage category for homes under 750 square feet. Previously, educational facilities fees in Manatee County were assessed as flat per-unit charges. This update addresses some regressivity concerns with the county’s previous fee schedule. Notably, the county has voted to increase impact fees by 50% over the next

1 Dwyer, Lesley. 2024. “Manatee County Impact Fees Will Increase over the next 4 Years.” Your Observer. February 27, 2024. Accessed February 11, 2024, <https://www.yourobserver.com/news/2024/feb/27/manatee-county-impact-fees-will-increase/>.

Table 3. Single-Family Residential Impact Fee Schedule (Effective 01/25)

SQUARE FOOTAGE	EDUCATION FACILITIES	LAW ENFORCEMENT	LIBRARIES	MULTI-MODAL TRANSPORTATION				PARKS	PUBLIC SAFETY	ADMIN SURCHARGE
				NE	NW	SE	SW			
<750	\$2,128	\$225	\$120	\$2,899	\$2,765	\$2,133	\$1,689	\$545	\$122	\$49
751-1000	\$3,940	\$225	\$120	\$2,899	\$2,765	\$2,133	\$1,689	\$545	\$122	\$66
1,001-1,300	\$6,591	\$349.75	\$186	\$4,511	\$4,303	\$3,319	\$2,630	\$846	\$180	\$108
1,301-1,700	\$6,689	\$479.25	\$245	\$6,168	\$5,884	\$4,541	\$3,585	\$1,159	\$239	\$124
1,701-2,200	\$6,893	\$602.75	\$306	\$7,752	\$7,395	\$5,706	\$4,505	\$1,460	\$299	\$141
>2,200	\$6,893	\$602.75	\$306	\$7,752	\$7,395	\$5,706	\$4,505	\$1,460	\$299	\$141

Source: "Fee Schedule." 2024. Mymanatee.org. 2024. Accessed December 11, 2024 https://www.mymanatee.org/departments/building_development_services/impact_fees/fee_schedule

four years (12.5% per year). This is the maximum increase allowed by state law.

Impact Fees in the City of Bradenton

While located within Manatee County, the city of Bradenton administers its own impact fees, which differ significantly from those of the county. As of July 2024, the city only charges residential units for parks and recreation, police, fire, and road impact fees. Unlike the county’s square footage-based structure, Bradenton calculates parks and public safety impact fees per square foot. The city’s road impact fees depend on the number of bedrooms rather than square footage, as well as residential development type. Table 4 displays the road impact fee schedule for the City of Bradenton.

Table 4. Single and Multi-Family Impact Fee Schedule for Roads in the City of Bradenton

BEDROOMS	SINGLE-FAMILY FEE	MULTI-FAMILY FEE
0	\$1,677	\$1,254
1	\$1,677	\$1,254
2	\$1,677	\$1,364
3	\$2,074	\$2,387
4+	\$2,834	\$2,387

Source: "Code of Ordinances, City of Bradenton, FL" https://library.municode.com/fl/bradenton/codes/code_of_ordinances?nodeId=PTIICOOR_CH18BUBURE_ARTXPEFE_DIV2IMFE

Regressivity Analysis

Table 5 presents affordable home prices across different incomes brackets in Manatee County, along with the estimated square footage for homes at each price point. Specifically, we determined the maximum home price affordable to each income bracket and used historical sales data to identify the median square footage of homes in that price range within a given county. For county fee schedules that vary with districts, we calculated both the maximum and minimum potential fees. This approach offers a more precise assessment of regressivity by directly linking impact fees to actual home sizes and prices affordable to different income groups in specific Florida counties.

While Manatee County’s impact fee schedule includes square footage categories smaller than 1,000 square feet, the median square footage of sold homes in the county does not fall into these ranges for any of the AMI levels analyzed. This is not to say that no homes in these smaller size categories were sold, but the data suggests that the typical home, even for lower-income buyers, tends to be larger than these county’s fee schedule categories.

The data also suggests that median-income homeowners pay the same impact fees as homeowners earning 80% and 120% of AMI. Since 80%, 100%, and 120% AMI brackets pay identical fees, this fee burden is also regressive. However, this 80% to 120% AMI range is what housing policymakers identify as workforce housing or housing for middle income households that may include full-time employed individuals such as teachers and police officers.

Under these assumptions, Manatee County’s fee schedule appears to be slightly regressive. While these findings suggest some degree of regressivity, they also highlight the complexities of designing equitable fee schedules. Simply moving away from flat

Table 5. Impact Fees by Home Affordability in Manatee County, Florida

HOUSEHOLD INCOME	HOUSEHOLD SPECIFICATIONS		MAXIMUM IMPACT FEE		MINIMUM IMPACT FEE		FEE DIFFERENCE
AMI THRESHOLD	AFFORDABLE HOME	SQUARE FOOTAGE	MAXIMUM IMPACT FEE (NE DISTRICT)	MAXIMUM FEE AS % OF HOME PRICE	MINIMUM IMPACT FEE (SW DISTRICT)	MINIMUM FEE AS % OF HOME PRICE	DIFFERENCE
50%	\$110,955	903	\$7,916	7.13%	\$6,706	6.04%	\$1,210
80%	\$198,402	1,596	\$15,103	7.61%	\$12,520	6.31%	\$2,583
100%	\$256,700	1,655	\$15,103	5.88%	\$12,520	4.88%	\$2,583
120%	\$314,998	1,687	\$15,103	4.79%	\$12,520	3.97%	\$2,583
150%	\$402,455	1,882	\$17,454	4.34%	\$14,207	3.53%	\$3,247
200%	\$548,190	2,242	\$17,454	3.18%	\$14,207	2.59%	\$3,247
300%	\$839,690	2,537	\$17,454	2.08%	\$14,207	1.69%	\$3,247

Source: *Fee schedule data from “Manatee County Impact Fees | Manatee County, FL.” <https://www.mymanatee.org/media/docs/default-source/advisory-boards/fee-schedule-effective-jan-1-2025.pdf>, note previous fee schedule is no longer publicly available online

*AMI data based on 2022 ACS 5-year estimates of median household income.

*Maximum affordable home based on monthly payment for a 7% interest rate for a 30-year mortgage, see JMI’s backgrounder report *Assessing Florida Local Government Impact Fees: 2024-2025*, Appendix B for detailed methodology.

fees, as Manatee County has done, is a step in the right direction. However, it does not fully eliminate regressive outcomes. When square footage ranges are used, there can still be regressivity both within individual ranges and across them. That said, the current fee schedule is far less regressive than a flat fee structure would be, and it is possible that Manatee County is nearing the minimum level of regressivity achievable without abandoning the principle that fees should reflect the true impact of development. In other words, the observed regressivity may not result from flaws in the fee design but rather from the inherent positive relationship between income, home price, and square footage.

Takeaways

Manatee County’s previous fee schedule (prior to September 2024) was an example of how a flat fee in practice can be burdensome on lower-income households because the educational facilities fees depended only on home type. Therefore, owners of a 1,000 square foot single-family home paid the same fee as owners

of a 10,000 square foot mansion. Thus, the most recent fee schedule is a step in the right direction towards reducing regressivity. Manatee County’s recent fee schedule updates address longstanding equity concerns, particularly by tying educational fees to home size. While the updated schedule reduces regressivity compared to flat fees, lower-income households still face higher relative burdens, particularly for homes affordable to those earning less than 80% of AMI.

As Manatee County is set to increase impact fees by 12.5% annually over the next four years (the maximum allowed by state law), the issue of regressivity warrants careful attention. Based on the assumptions and data used in this analysis, the county’s current fee structure appears regressive. More rigorous analysis is needed to confirm this. However, while regressivity is a key consideration, future research should also explore the proportionality of Manatee County’s impact fees. Though more challenging to assess, understanding whether fees accurately reflect the demands placed on infrastructure by new developments is crucial for designing equitable fee structures.



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