Downtown Sarasota 101

Facts, Context, and Questions for City Leadership

Prepared by the **Downtown Sarasota Condominium Association** - June 2026

Working to Enhance the Downtown Experience

Introduction

This briefing was prepared by the **Downtown Sarasota Condominium Association** as a resource for Sarasota's city leadership, including the incoming City Manager, senior city staff, elected officials, and others working on the future of downtown Sarasota.

It is offered in the spirit of a first conversation — not as a formal position paper or a list of demands, but as a collection of facts, observations, and context we hope will be useful in understanding downtown Sarasota's changing role within the city and county.

DSCA represents approximately 40 member condo and townhome associations, with more than 14,000 seasonal and year-round residents across the greater downtown area. We have been a consistent presence in city meetings, development reviews, and civic conversations for more than two decades. We know downtown well. We also understand that we see it from a resident's vantage point. City leadership must weigh many perspectives, priorities, and responsibilities. This briefing is intended to contribute constructively to that broader conversation.

June 2026 Revision Note. This is the first revision of the briefing book originally prepared in May 2026. The principal change is the addition of a tourism and visitors section, with support material in Appendix L. The section was added because downtown Sarasota is also a major part of the county's visitor economy.

How this document is organized

The briefing begins with a short executive summary, then moves to regional context and demographic data, introduces DSCA, and presents the core factual sections: existing residential inventory, the development pipeline, and the real estate market. It then focuses on several practical city-management issues, including density, connectivity, downtown operations, and retail opportunity. A section called *The Demographic Aha* provides deeper analytical framing, including Florida and broader population comparisons. The document closes with DSCA's observations and key questions raised by the data.

A note on tone

Some sections are factual — drawn from data from BEBR, the Bureau of Economic and Business Research at the University of Florida, U.S. Census data, city records, DSCA development tracking, and independent research. Other sections reflect DSCA's observations based on years of engagement with downtown residents, city staff, development proposals, public meetings, and civic discussions. Where we offer observations, they are intended to be practical and constructive rather than prescriptive.

What this document is — and is not

This briefing is **not** intended to be a comprehensive city-wide plan, a substitute for city staff analysis, or a formal legislative agenda. It is a downtown residential briefing prepared by DSCA to share facts, observations, and practical context that may be useful as the new city manager begins work. It is offered as a good-faith orientation from a neighborhood association representing high-rise, mid-rise and townhome residential buildings in the greater downtown area.

DSCA recognizes that downtown is only one part of the city. At the same time, downtown carries a large share of the city's population growth, taxable value, cultural identity, and development activity. For that reason, how downtown is managed has citywide importance.

Contents

Executive Summary: Six Things to Know About Downtown Sarasota

Downtown Sarasota is small in geography but unusually important to the city's future. It contains a large share of the city's housing, taxable value, cultural activity, civic life, and development pressure within a compact area.

First, Sarasota's growth depends on continued ***in-migration***. Sarasota County's deaths substantially exceed births. Population growth is being sustained by people choosing to move here. That makes the city's attractiveness — its arts, parks, walkability, restaurants, public spaces, and quality of life — a core economic asset, not simply a lifestyle benefit.

Second, downtown is absorbing a major share of the city's growth. DSCA's tracking shows thousands of existing residential units downtown, with many more under construction or in the city's development review process. This is changing the practical demands placed on streets, sidewalks, urban trees, parking, public safety, code enforcement, utilities, and city communications.

Third, downtown density calls for a different service model. Downtown may not be well served as if it were a low-density residential neighborhood. High-rise living, rental growth, seasonal occupancy, construction impacts, special events, limited parking, traffic management, and increasing pedestrian activity all require more coordinated city operations.

Fourth, infrastructure has become a strategic issue. Connectivity between Main Street and the Rosemary District, the Quay, The Bay Park, Golden Gate Point, and the future performing arts center area will strongly influence downtown's livability and economic value. Streets, sidewalks, shade, crossings, transit, parking, and public spaces are part of the same system.

Fifth, any major initiative must deliver a quality-of-life gain most residents can see and a value equation they can grasp without explanation—an obvious win for them, their families, their neighbors. The challenge is less identifying a greater good than building durable community-wide support behind one whose benefits are real, important, and longer-term.

Sixth, Sarasota is increasingly exposed to a K-shaped economy—higher-income visitors, residents, buyers, and donors may keep spending while price-sensitive workers, younger households, and middle-income residents face mounting pressure. The city can look strong at the top of the market while growing more fragile underneath, which is why real, substantial affordability solutions belong at the center of long-term resilience.

DSCA wants to be a constructive partner. DSCA brings a residential perspective, a large downtown constituency, and a data-based understanding of downtown and city conditions. Many of our residents bring strong life experiences, who volunteer to bring their expertise into the various committees of DSCA and engage with City staff and commissioners.

Setting the Scene: State and Regional Context

A Quick Look at Florida’s Growth Context

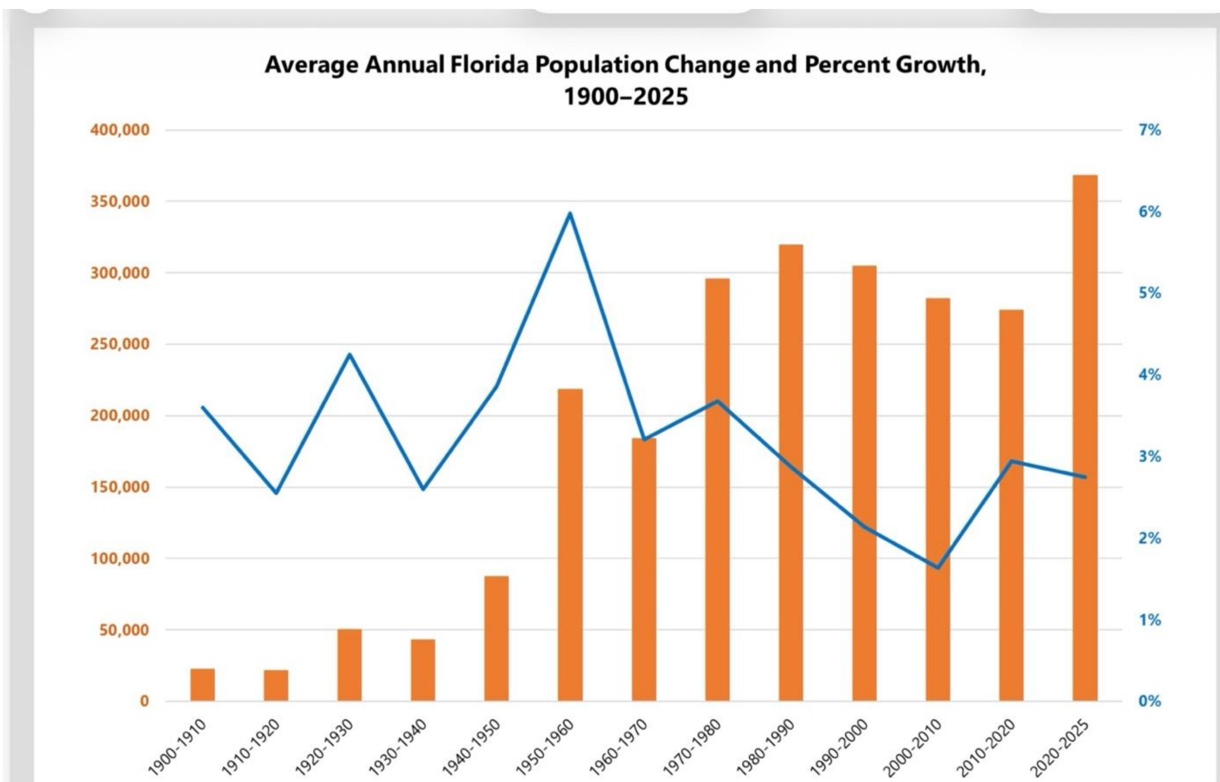
Before looking specifically at the City of Sarasota, it is useful to start with the broader Florida context. The Bureau of Economic and Business Research at the University of Florida — BEBR — has produced Florida’s official city, county, and state population estimates and related projections since 1970. Its recent population materials show two important points.

First, Florida’s growth has been very large in absolute terms. BEBR estimates Florida’s 2025 population at approximately 23.38 million. From 2020 to 2025, Florida added an average of approximately 368,000 residents per year, or about 1,000 people per day — more than the current population of Orlando each year.

Second, growth rate is expected to slow, but the numbers remain very large. For 2025 to 2030, BEBR projects average annual population growth of approximately 306,000 residents per year, or about 838 people per day — more than the current population of St. Petersburg each year.

This matters for Sarasota because local growth is not happening in isolation. Sarasota is part of a statewide migration and growth pattern that continues to reshape Florida's housing markets, transportation needs, public infrastructure, labor force, and demand for city services. Even if the pace of growth moderates, the absolute number of new residents expected in Florida remains substantial.

The BEBR slide below also shows why this moment feels different. Florida has experienced several major periods of rapid population growth since 1900, but the 2020–2025 period stands out as one of the largest in absolute annual population gains. At the same time, the percentage growth rate is lower than during some earlier Florida boom periods because the state is now so much larger. In plain terms: Florida is adding huge numbers of people, even though the percentage growth rate is no longer as high as it was in earlier decades.



The City of Sarasota grew by an estimated 6.3% from 2020 to 2025. That is a meaningful increase for a built-out city with limited land area, although it was below Sarasota County's 12.4% growth rate over the same period. The important point is not just the percentage change, but where that growth is occuring: a major share of the city's new residential growth is concentrating in and near downtown.

For Sarasota, the practical takeaway is straightforward. The city is operating within a large and continuing statewide growth cycle, but one that may be entering a more complicated phase: slower percentage growth, continued high absolute growth, higher housing costs, infrastructure pressure, changing tax policy, and increasing competition among Florida communities for residents, workers, visitors, and investment.

A quick regional snapshot — Sarasota County, the City of Sarasota, downtown, and DSCA's constituency — as a starting orientation.

Geography	Population (2025)	Growth 2020–25	Key Fact
Sarasota County	487,640	+12.4%	Growth entirely from in-migration; 2.28 deaths per birth
City of Sarasota	58,279	+6.3%	12% of county; younger, more diverse, more renter-oriented
Downtown Sarasota	~8,000–14,000+	Growing	~27% of city housing in 12% of city land; ~7,100 existing units
DSCA constituency	14,000+ seasonal	38 associations	145 buildings tracked across seven districts

Source: UF Bureau of Economic and Business Research (BEBR) January 2026 official estimates; DSCA building database March 2026; ACS 2019–2023.

Sarasota County added 53,634 permanent residents between April 2020 and April 2025 — a growth rate of 12.4%, substantially faster than the U.S. overall (+2.6%) and faster than Florida's statewide rate (+6.8%). The City of Sarasota grew by 3,437 residents (+6.3%) to 58,279. The fastest-growing municipality in the county is North Port (+28.8%, from 74,793 to 96,301). The unincorporated county added 24,327 residents (+8.9%) to reach 298,476.

But the headline growth rate conceals a structural reality. Over this same five-year period, the county recorded 14,706 births and 33,565 deaths — a net natural loss of 18,859 people. The entire population gain, and then some, came from 72,493 net in-migrants. Without continuous in-migration, Sarasota County's population would be shrinking, not growing.

BEBR projects Sarasota County reaching approximately 559,000 by 2050. That projection assumes the migration pipeline remains robust. As discussed later in this briefing, there is early evidence that the pipeline is narrowing.

Where the Regional Growth Is Actually Landing

Public conversation in the city often frames regional growth as "what is happening in Lakewood Ranch." The BEBR April 1, 2025 estimates show a more complete picture: growth in southern Sarasota County is comparable in scale to growth in unincorporated Manatee County, and a single south-county municipality — North Port — outgrew every jurisdiction in the two-county region.

Jurisdiction	2020	2025	Change
Manatee County			
Unincorporated Manatee (incl. Lakewood Ranch, Parrish)	323,057	387,159	+64,102
Bradenton	55,698	58,469	+2,771
Manatee County total	**399,710**	**466,845**	**+67,135**
Sarasota County			
North Port	74,793	96,301	+21,508
Unincorporated Sarasota County	274,149	298,476	+24,327
Venice	25,463	29,802	+4,339
City of Sarasota	54,842	58,279	+3,437
Longboat Key (Sarasota portion)	4,759	4,782	+23
Sarasota County total	**434,006**	**487,640**	**+53,634**

Source: University of Florida Bureau of Economic and Business Research, Florida Estimates of Population 2025 (April 1, 2025 base, released December 2025), Table 1.

Two observations follow directly from these figures.

First, the two growth stories are comparable in scale. Unincorporated Manatee County — which includes Lakewood Ranch on the Manatee side, Parrish, and the east-county developments along SR 64 and SR 70 — added approximately 64,000 residents between 2020 and 2025. Over the same period, southern Sarasota County (North Port, Venice, and the unincorporated balance, most of which lies south of Clark Road) added approximately 50,000 residents. The growth conversation that focuses primarily on Lakewood Ranch captures roughly half of the regional picture.

Second, North Port is now the dominant municipal growth story in the two-county region. North Port grew by 21,508 residents (+28.8%) in five years — more people than the entire current population of the City of Venice (29,802), and roughly 7.8 times the growth of the City of Bradenton over the same period. North Port is now 96,301 residents, making it the largest city in Sarasota County by a substantial margin and approximately 1.65 times the size of the City of Sarasota. The City of Sarasota, by contrast, accounted for 3,437 of Sarasota County's 53,634 new residents, or 6.4% of county growth.

The geographic center of population is shifting. The City of Sarasota represented 12.6% of Sarasota County's population in 2020. By April 2025 the share was 11.95%. Under BEBR's February 2026 medium projection (Sarasota County reaching 525,800 in 2030 and 555,800 by 2035), and assuming the city continues to capture a single-digit share of new growth, the City’s share of the county will fall below 11% before 2030 and approach 10% in the mid-2030s. The new residents arriving in the region are increasingly located closer to Venice, Wellen Park, and the I-75 corridor than to the historic downtown.

Sarasota in Context

A closer look at age structure, income, diversity, and the birth-to-death ratio — with Sarasota County compared to Florida as a whole.

Age Profile: The City and County Are Meaningfully Different

Sarasota County's age structure is its most distinctive demographic feature — and the one with the deepest implications for longer-term city planning. But the city and the county tell different stories. The City of Sarasota, at a median age of 49.3, is eight years younger than the county. Its working-age population (approximately 59%) is close to the national norm. Its racial and ethnic composition is markedly more diverse than the county as a whole.

Age indicator	City of Sarasota	Sarasota County	Florida
Median age	49.3 yrs	57.4 yrs	~42.0 yrs
Population 65+	~28–29%	37–38%	~22%
Under 18	~17%	13.9%	~19%
Working age (18–64)	~59%	~48%	~59%

Sources: ACS 2019–2023; U.S. Census Bureau QuickFacts 2020–2024; BEBR Florida Estimates of Population 2024. Sarasota County ranked 3rd among Florida's 67 counties in share of population age 65 and older in BEBR's 2023 county rankings.

A note on age data and sources. Readers may encounter different estimates for the City of Sarasota's age profile depending on the source and data vintage. BEBR's estimates and some earlier ACS releases placed the city's 65+ population at approximately 24%. The most recent ACS 5-year estimates (2020–2024) show approximately 28–29%, which is consistent with Census QuickFacts and multiple independent compilations of the same underlying data. We use the 28–29% figure in this briefing as it reflects the most current available data. The difference between sources is partly methodological — BEBR produces model-based population estimates while ACS uses household survey data — and partly a reflection of genuine demographic change. The city's median age has risen from approximately 44 in the 2010 Census to approximately 48–49 in current estimates — a shift of four to five years in roughly 14 years. That pace of aging, while less extreme than the county's, is significant and is consistent with the national trend of population aging accelerated by Sarasota's migration-driven growth pattern: the people choosing to move to Sarasota are, on average, older than the residents they are replacing.

The county's extreme age profile — 38% of residents aged 65 or older, only 13.9% under 18 — means a compressed working-age labor pool, high healthcare demand, and structural pressure on every sector that depends on resident workers: hospitality, healthcare, construction, and city government itself. The City of Sarasota's profile is more balanced, but it does not escape the county context in which it sits.

The important comparison is not with another metropolitan area, but with Florida itself. Sarasota County is older than an already older state. BEBR's 2023 county rankings placed

Sarasota County third among Florida’s 67 counties for the share of residents age 65 and older, behind only Sumter and Charlotte counties.

The city is more diverse than the Sarasota stereotype suggests.

The City of Sarasota is often perceived as an older, affluent, largely white caucasian coastal community. That perception is not entirely wrong when looking at Sarasota County as a whole, or at some of the DSCA downtown districts (boundary map follows). But it is incomplete — and can be misleading when applied to the City of Sarasota.

The City of Sarasota is becoming more diverse — and is already significantly more diverse than Sarasota County as a whole. According to ACS 2020–2024 data, approximately 36.5% of City of Sarasota residents identify as minority, compared with roughly 20% for Sarasota County. The city’s largest non-White population groups are Hispanic or Latino, Black or African American, Asian, and residents identifying as two or more races.

That citywide diversity, however, is not evenly distributed. Much of it is likely concentrated in neighborhoods such as Newtown, the North Tamiami Trail corridor, and east of the downtown core. The DSCA neighborhood — including the Quay, Golden Gate Point, and parts of the bayfront — are likely much less diverse by income, race, age, and household type.

For city management, the point is not that downtown fully mirrors the city’s diversity. It does not. The more precise point is that Sarasota is not one demographic story. The county, the city, the historic neighborhoods, the older rental corridors, the Rosemary District, and the new bayfront condominium markets each have different demographic profiles, service needs, housing pressures, green space deficits, and expectations for civic engagement.

For DSCA, the important point is precision. Downtown’s growth is important, and the Rosemary District includes a meaningful mix of housing types and income levels. But the city’s broader racial, ethnic, income, and age diversity is more complex than the common Sarasota stereotype suggests.

Economic and Demographic Profile

The City of Sarasota’s economic and demographic profile diverges significantly from the county’s — in ways that matter for service delivery, housing policy, and civic engagement. The city has a higher poverty rate, is more renter-oriented, and is markedly more diverse.

Indicator	City of Sarasota	Sarasota County	Florida
Median household income	$72,105	$83,416	$74,568
Poverty rate	15.0%	8.6%	12.0%
Owner-occupied housing	57.5%	76.7%	67.6%
High school grad+ (age 25+)	92.5%	94.8%	89.9%
Bachelor's degree+ (age 25+)	41.8%	40.8%	34.1%
White (non-Hispanic)	63.2%	80.4%	50.6%
Hispanic / Latino	17.9%	11.5%	28.7%
Black / African American	14.7%	4.8%	16.9%

Source: U.S. Census Bureau QuickFacts 2020–2024 for city, county, and Florida profile data.

Census income generally includes regular income such as wages, self-employment income, Social Security, pensions, interest, dividends, and net rental income. It excludes certain receipts such as capital gains, withdrawals from savings, inheritances, loans, insurance payments, and other lump-sum receipts.

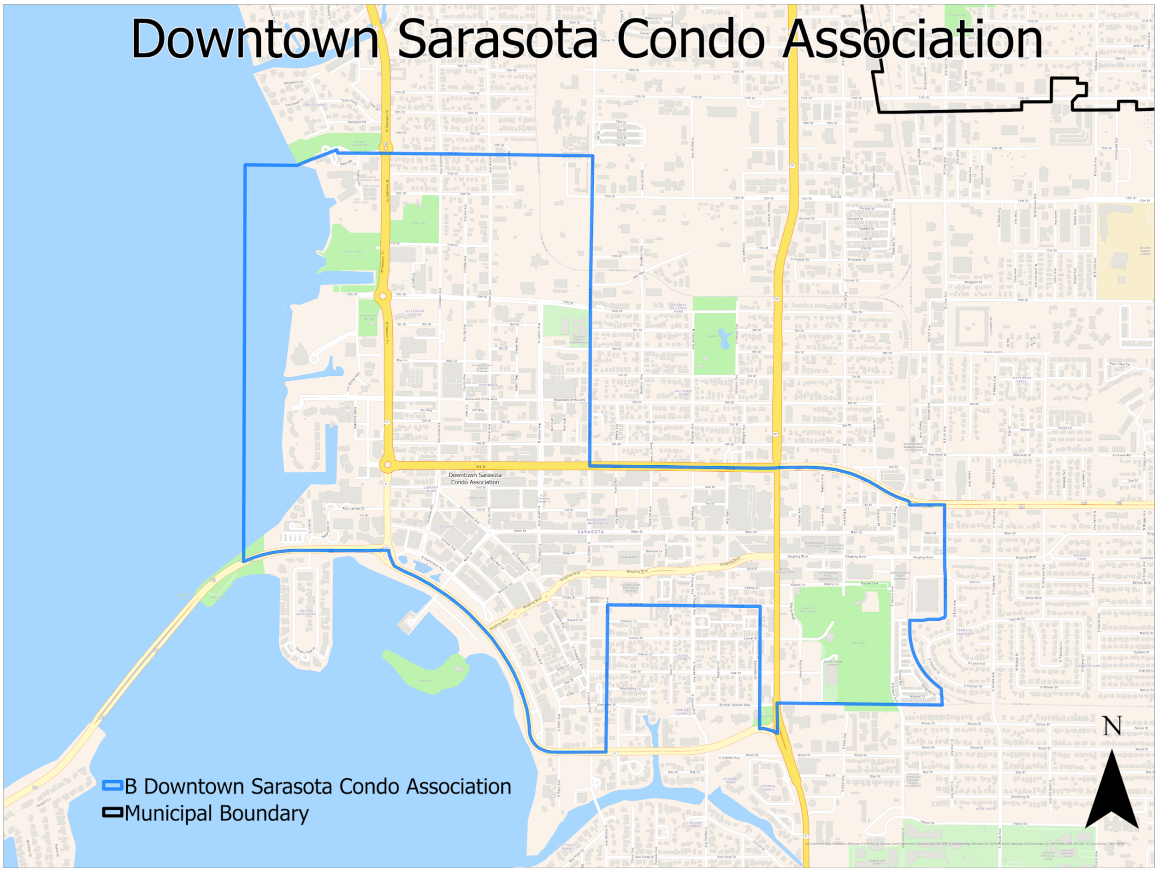
This matters in Sarasota. A household may report modest annual income while still having substantial assets, home equity, savings, or investment holdings. In an older, coastal, high-home-value community, the real financial capacity of many households may be higher than median income alone suggests.

For that reason, median household income should be read alongside per capita income, owner-occupied home values, ownership rates, age profile, taxable property values, and the character of new residential development. The income figure remains useful, especially for affordability and service planning, but it is not a complete measure of Sarasota’s economic strength or community wealth.

Income definition source: U.S. Census Bureau, About Income and Census Glossary definitions of money income.

Who Is DSCA

Before turning to the downtown data, a brief introduction to DSCA — who we are, what we represent, and why we assembled this briefing.



DSCA boundary (blue) and City of Sarasota municipal boundary (black). Source: DSCA.

The Downtown Sarasota Condominium Association is a voluntary residential association representing approximately 40 member associations and more than 14,000 full-time and seasonal residents across the greater downtown area. DSCA's geography covers approximately 1.8 square miles — roughly 12% of the city's land area — but contains approximately 25% of the city's permanent population and more than 65% of new residential development.

DSCA maintains a comprehensive database of downtown residential buildings in existence: roughly 145 properties across seven districts, now consolidated for DSCA reporting as DSCA Downtown, DSCA North, Rosemary District, and Quay+. Golden Gate Point is summarized separately in this briefing for purposes of an unofficial downtown residential picture. This database is the foundation for the inventory, pipeline, and housing analysis that follows.

The association has deep, long-standing relationships with city staff, commissioners, and community stakeholders, built through consistent participation in public processes and data-informed advocacy.

DSCA's governing philosophy centers on combining rigorous data with long-term quality-of-life thinking. Where DSCA has a position, it tries to arrive at that position through analysis rather than assumption, and to present its reasoning alongside its conclusions.

DSCA is a recognized neighborhood association whose member buildings are high-rise and mid-rise and townhome residential structures. Their infrastructure requirements, safety needs, and quality-of-life concerns differ in important ways from those of single-family neighborhoods — and warrant a distinct voice in city decisions about downtown.

Mission & Purposes

Mission Statement

The mission of DSCA is to actively advocate for the collective interests of its members. In doing so, it will seek to identify important community issues that will enhance the lives of the residents and property values of its member condominiums and townhouse associations. (Revised: November 4, 2020)

Note the dual emphasis embedded in the founding mission: enhancing the lives of residents AND protecting property values. Quality of life and economic sustainability are not competing goals at DSCA — they are the joint mandate the organization was built around.

Organizational Purposes

Purpose	As Stated
Beautification & preservation	Encourage beautification of Downtown Sarasota; promote preservation of the community including marine and upland parks and open spaces.
Land use & planning input	Provide input on land use, zoning, traffic planning, pedestrian mobility, parking, safety, and other issues affecting the Downtown Sarasota community.
Public safety cooperation	Work with local law enforcement on crime control, motor vehicle, boating, and pedestrian safety in Downtown Sarasota.
Legislative & governmental advocacy	Promote collective membership interests regarding proposed state legislation, county or city ordinances, or actions of governmental agencies.
Community & cultural activities	Initiate or participate in community surveys, traffic studies, fundraising, community and cultural events, and other pursuits that enhance downtown living.

What Sets DSCA Apart

DSCA is one of approximately 30 recognized neighborhood associations in the City of Sarasota and is a member of the Coalition of City Neighborhood Associations (CCNA). DSCA's constituency is distinctive in several ways the incoming city manager should understand from the outset:

- **Density and concentration** — Roughly a quarter of the city's population in less than 8% of its land area creates infrastructure, emergency response, and service delivery requirements that no other Sarasota neighborhood faces.
- **High-rise specificity** — Post-Surfside condo structural integrity law compliance, elevator safety, vertical evacuation planning, and building-scale utility demands are DSCA-specific concerns that other neighborhood associations do not face.
- **Data capacity** — DSCA maintains a monthly development tracker, engages regularly with the City's DRC materials and building permit records, and draws on BEBR demographic data.
- **Monthly board meetings — year-round** — Unlike many civic organizations, DSCA holds active board meetings throughout the year, including during the off-season. This sustained calendar means DSCA is engaged, informed, and organized regardless of the time of year.
- **In-person civic participation** — DSCA is a consistent, visible presence at City Commission meetings, Development Review Committee hearings, and Planning Board sessions. Board members attend in person, speak on the record, and follow individual applications through the full approval process.

Member Associations

DSCA's approximately 40 member associations represent the full range of downtown high-rise, mid-rise and townhome residential living — from the Ritz-Carlton Residences, Bayso, and Beau Ciel to Broadway Promenade, Artisan on Main, and Payne Park Village. There are approximately 48 residential buildings in the greater downtown area in total; DSCA's 38 member associations account for the large majority of the area's roughly 7,000 existing dwelling units.

Organizational Structure

DSCA's effectiveness rests on a structure designed for sustained engagement: a board of directors drawn from member condo/HOA associations, a network of associate members who provide professional expertise, and standing committees focused on specific policy areas. Together, these bring scale, depth, and continuity to DSCA's work with city government.

Board of Directors

The DSCA board is composed of representatives from member associations, with officers including the President, Vice President(s), Secretary, and Treasurer. Patrick McNamee currently serves as President, having succeeded David Lough in 2026. The board meets monthly throughout the year — including off-season — in hybrid format (in-person and via Zoom). Past meeting recordings are available on DSCA's YouTube channel.

Associate Members

DSCA's Associate Member program brings professional expertise and service-provider perspectives into the organization's work. Associate members include law firms, property management companies, real estate professionals, financial services providers, roofing, reconstruction and other firms whose work intersects with downtown residential life. They participate in DSCA's educational programming, provide subject-matter expertise on issues like Florida condominium law and insurance markets, and host continuing-education events for DSCA members and residents.

Standing Committees

DSCA's committee structure organizes work around specific policy areas, allowing focused engagement and continuity across changes in board composition. Each committee has a chair, regular working sessions, and a defined charge.

DSCA’s current committees and their projects show the many areas of engagement with City administration.

- **Executive Committee** – This is a standing committee that includes the officers of the organization (President, Vice President, Secretary, Treasurer, Presidents Emeritus). It is the prime group to carry out the advocacy role of the organization, especially in interfacing with the City of Sarasota and City Commission. Current activities include:
    - Downtown Master Plan Update
    - City Manager Search
    - City Strategic Plans
    - City Budget & Capital Improvement Projects process
- **Arts & Cultural Committee** – This committee is formed to work with DSCA Member organizations, the Downtown Sarasota residents, City of Sarasota staff and other local arts organizations to encourage residents and businesses to take an interest in, engage in the public discussion of such activities, collaborate on, and take public positions on changes and new projects in the arts. Currently tracking:
    - Van Wezel Performing Arts Hall (VWPAH) re-use
    - Sarasota Performing Arts Center (SPAC) development plans
    - Promotion of city’s many arts & cultural organizations

- **Associate & Events Committee** – This committee focus is to plan and organize educational forums and other related events to address key issues important to our members, and to gain support of said events and provide exposure for Associate Member services. Recent DSCA hosted educational events include:
    - DSCA Seminar: ***Master of Our Destiny*** – ***What is a City Master Plan & How Does It Work?*** – 2026-04-09
    - DSCA Town Hall: ***Downtown Sarasota: Balancing Viable Change*** – 2026-03-04
    - DSCA Workshop: ***Building Bridges: Downtown Development & Community Voices*** – 2025-10-16
    - DSCA Workshop: ***Building a Safer Sarasota*** – 2025-04-10
    - DSCA Town Hall: ***Q&A with SPD Chief, Rex Troche*** (w/ Mobile Command Center vehicle) – 2025-03-13
    - DSCA Workshop: ***The Future of Homelessness Solutions in Downtown Sarasota*** - 2024-12-09
    - DSCA Workshop: ***Understanding Sarasota's Changing Condo Market Things you need to know!*** - 2024-10-17
    - DSCA Town Hall: ***Downtown Sarasota: Placemaking for People*** - 2024-04-03
- **Transportation Committee** – This committee focus is on issues related to multi-modal transportation, traffic, signage, and pedestrian access in downtown Sarasota. Currently tracking and reporting on:
    - Roundabout Safety & Education
    - Traffic Calming
    - Plans for more public Parking
- **Homeless, Health & Safety Committee** – This committee focus is on programs to support efforts to reduce the homeless populations in Sarasota, enhance downtown residents' health and safety and works closely with the Sarasota Police Department and any other organizations to affect these programs.
    - Homeless Annual Counts
    - Coordination with City's Homeless Outreach Teams (HOT)
    - Educate/inform Downtown residents through their associations how to effectively use the 9-1-1 and Click-2-Fix Systems.
- **Zoning Code & Greenspace Committee** – This committee focus is on the Zoning Code as it relates to Land Development Applications and the impacts of Administrative Review and Public Hearing processes. Related issues include green spaces, street trees, public parks, in downtown Sarasota. Currently tracking and reporting on:
    - Sound Ordinance Update

- Special Events Ordinance Update
- Development Review Committee Process review
- Canopy Street Trees for new residential developments & Urban Forest Program
- Construction staging impacts on access and health safety for pedestrians

Member Communications

DSCA maintains a steady cadence of member communications: a monthly Community News Update newsletter (consistent open rate above 50%), targeted news flashes on time-sensitive issues, an active website at www.downtownsarasotacondoassoc.com, a YouTube channel archiving workshops and meeting videos, and a presence on social media. A sample newsletter is included as Appendix G.

DSCA in the Broader Civic Ecosystem

CCNA — Coalition of City Neighborhood Associations

DSCA is a member of CCNA, the citywide body that brings together Sarasota's neighborhood associations for coordinated engagement with city government. DSCA values that role and expects the incoming city manager to engage with CCNA as an important citywide forum. DSCA will also engage directly on downtown-specific issues where high-rise residential concerns require more detailed attention.

DID — Downtown Improvement District

DSCA and the Downtown Improvement District represent downtown from complementary angles. The DID focuses on business vitality, streetscape, and visitor experience; DSCA focuses on residents, infrastructure, and quality of life. These mandates are mutually reinforcing — a vibrant downtown business environment depends on a strong residential base, and vice versa.

The two organizations are now actively building a more coordinated working relationship. The DID board has recently accepted DSCA's offer to provide quarterly presentations and updates at DID board meetings, with the explicit purpose of identifying areas of common interest and exploring opportunities for collaboration. This standing channel is a constructive step — and one that DSCA expects will produce concrete joint work over the coming year.

Source: DSCA City Manager Candidate Briefing, May 2026; City of Sarasota GIS

Chamber — Greater Sarasota Chamber of Commerce

DSCA has a reciprocal membership with the Chamber of Commerce, and works with them on government affairs issues affecting downtown.

Downtown Residential Inventory

What downtown Sarasota has today — buildings, types, districts, total units, and how ownership compares with rental across the downtown footprint, the city, and the county.

Downtown Sarasota contains approximately 7,100 existing residential units across roughly 145 buildings in DSCA's downtown reporting districts, with Golden Gate Point included for unofficial downtown-context purposes. This is DSCA's best estimate of the actual dwelling-unit inventory in the greater downtown area, based on building-by-building tracking.

For comparison, ACS 2020–2024 estimates show the City of Sarasota with approximately 32,000 to 33,000 total housing units, including both occupied and vacant units. On that basis, the greater downtown area contains roughly 22% of the city's total housing-unit inventory, concentrated in approximately 12% of the city's land area.

This comparison uses total housing units, rather than occupied households, because DSCA's building database counts dwelling units regardless of whether they are owner-occupied, renter-occupied, seasonal, vacant, or recently completed. Occupied-household counts remain useful for income, poverty, owner/renter status, and household composition, but total housing units provide the better comparison for residential density and built-form analysis.

The density difference is significant. Using ACS 2020–2024 total housing-unit estimates and the land-area denominator used in this analysis, the City of Sarasota averages approximately 3.98 housing units per acre citywide. By comparison, the greater downtown DSCA area is already substantially denser, with roughly 7,100 existing units in approximately 1.8 square miles — about 6.2 units per acre before adding the current construction and DRC pipeline.

The Rosemary District shows the difference even more clearly. With approximately 2,250 existing dwelling units in about 130 acres, Rosemary is already at roughly 17 dwelling units per acre — more than four times the citywide average. If current construction and planned projects are completed, the district could approach approximately 3,050 units, or about 23 to 24 dwelling units per acre.

A related note concerns persons per dwelling unit. ACS citywide data implies approximately 2.2 persons per housing unit for the City of Sarasota. For DSCA's downtown estimates, we generally use a lower working assumption of approximately 1.6 persons per dwelling unit. That lower figure better reflects the downtown residential mix: smaller households, older residents, seasonal occupancy, second homes, one- and two-person condominium households, and newer apartment buildings. The 1.6 figure should be read as a practical planning estimate, not as a census count.

Put in county context, Sarasota County has approximately 212,000 occupied households under current Census QuickFacts estimates. Downtown's roughly 7,100 existing dwelling units are about 3% of the county's occupied household count — a small share geographically, but economically and civically disproportionate given the concentration of property value, cultural activity, and development pressure in that footprint.

DSCA's May 2026 development tracker separately records 929 units under active construction and approximately 1,992 units in the DRC approval process — a combined current pipeline of 2,921 additional dwelling units. Because project status changes frequently, these figures should be read as current working estimates rather than a fixed census. Simply put, several of the projects in the DRC systema will not happen.

Greater Downtown District Summary

District	Buildings	Existing	UC	Planned	Total
DSCA Downtown	68	3,430	303	832	4,565
Rosemary District	41	2,235	435	463	3,133
DSCA North	6	470	147	—	617
Quay+	9	778	164	224	1,166
Golden Gate Point	22	234	86	—	320
TOTAL	**146**	**7,147**	**1,135**	**1,519**	**9,801**

Source: DSCA building database, March 2026 revision. Existing = occupied or recently completed. UC = Under Construction. Planned = in DRC approval process. DSCA Downtown consolidates the former Downtown West, Central, and East sub-districts. Golden Gate Point is included for unofficial downtown-context purposes and is no longer treated as an official DSCA boundary district. The May 2026 Development Pipeline section later in this document provides a more current project-by-project construction and DRC review count.

Ownership vs. Rental

Using the current ownership/rental subset of DSCA's existing inventory, 4,099 units (59%) are ownership — condominiums and townhomes — and 2,854 units (41%) are rental apartments. That ownership rate is meaningfully below the county's 76.7% and slightly above the city's 57.5%, reflecting the urban, multifamily character of the downtown core.

Geography	Ownership	Own %	Rental	Rent %	Total
Downtown (existing)	4,099	59.0%	2,854	41.0%	6,953
Downtown (incl. UC)	4,586	56.2%	3,580	43.8%	8,166
City of Sarasota	~14,807	57.5%	~10,944	42.5%	25,751
Sarasota County	~162,260	76.7%	~49,944	23.3%	212,204

Downtown: DSCA database March 2026. City/county: U.S. Census Bureau QuickFacts 2020–2024. Counts are approximate, calculated from household counts and rounded ownership rates.

The pipeline includes both rental and ownership projects. As of May 2026, DSCA's development tracker shows 929 units under construction, including approximately 584 rental apartments and 345 condominium or townhome units. The DRC pipeline leans more heavily toward ownership, with major projects such as Waldorf Astoria, Ritz-Carlton Tower 3, and Saravela expected to affect the longer-term mix. The mix is fluid, but the practical point is clear: downtown is adding a large number of residents in both rental and ownership buildings.

What this means for city management. A downtown that is 41% renter — and trending higher — has different service needs, different tenure stability, and different civic standing than an ownership-dominant suburb. Renters experience noise, parking, construction impact, and code enforcement issues directly but have limited formal standing in condo association governance or city planning processes. DSCA's role as an organized residential voice is structurally important: it provides a channel for downtown residents — owners and renters alike — that no individual building or management company can replicate.

Downtown Greenspace

According the City's Comprehensive Plan, Environmental Protection and Coastal Islands Chapter, we find the Environmental Preservation and Sustainability Priority.

> "*Recognize the vital role Sarasota's natural resources play in a healthy community and economy, and implement projects and policies that sustain them*."

> Goal #1.
>
> *It shall be the goal of the City of Sarasota to protect, maintain, enhance, and, where appropriate, restore its natural environment.*

Under the Action Strategies for Urban Forestry Program is this commitment.

> *The City shall work toward achieving and maintaining Sarasota County's **tree canopy coverage goal of 40%** through application of the tree protection ordinance and preservation and management of a canopy with City rights-of-way and properties.*

These are some facts regarding canopy tree coverage in downtown Sarasota.

- A Sarasota County Tree Canopy Study in 2013 showed City of Sarasota land mass with 34% trees & shrubs; which was less than the Comp Plan Action Strategy goal of 40% tree canopy coverage.
- The City's Urban Forest Program Update of 2024 showed the Downtown Bayfront zone district (DTB) area with only a 15% canopy tree coverage. The DTB zone is where most of the new high-rise condo development is occurring in Downtown.
- Current site plan developments in DTB zone are being allowed to replace street trees with ROW only the minimum size trees (3" caliper saplings) and pay into the Tree Fund; rather than requiring the developer to plant the required mitigation size (3", 5" or 7"). This results in a loss of approximately 80% of the existing tree canopy coverage on such infill development sites.

DSCA has actively worked for increasing – not decreasing – the tree canopy coverage in Greater Downtown Sarasota. DSCA helped to create the Downtown Green Space Policies (2011). In 2016, DSCA volunteers led a grassroots initiative to fulfill a targeted need from the Downtown Master Plan, which identified the goal of a community space in the middle of the Rosemary District. What began as a DSCA-initiated effort later expanded through cooperation with the Rosemary District Association and a broader base of community support. The work culminated in 2024 with the opening of a publicly accessible pocket park in the Rosemary District, now known as Overtown Square.

As new land development projects are identified in the downtown zone districts, DSCA attempts to work with the developer and local landscape architecture firms to plant as many large canopy street trees as feasible.

Stratification Across the Housing Continuum

How downtown's housing stock is stratified — the price tiers, market character, and the gap between the top and bottom of the continuum.

Downtown Sarasota's housing market spans from attainable workforce apartments to ultra-luxury bayfront condominiums exceeding $10 million. The gap is widening. At the top: Ritz-Carlton Residences, One Park, Waldorf Astoria Residences, and SIX 88 target buyers with seven- and eight-figure purchase budgets. At the bottom: workforce housing is limited to a handful of committed attainable projects — Lofts on Lemon (100% attainable), Aspire on Tenth (47 attainable units), and the FST Arts Plaza (24 attainable units). The middle is thinning.

Of 929 units currently under construction, 171 (18%) are designated attainable, affordable or lower-income (e.g. Lofts of Lemon 2) There is no binding inclusionary zoning — all affordability commitments are individually negotiated through the DRC process. One example, the proposed McCown Tower 3 (96 senior apartments, county funding approved May 5, 2026) would add meaningfully to the affordable inventory if it proceeds.

The stratification has direct implications for downtown's long-term character. A housing market that serves primarily the affluent top and the subsidized bottom, with an eroding middle, creates workforce challenges for restaurants, retail, healthcare, hospitality, and city services. The workers who maintain downtown's quality of life increasingly cannot afford to live there — or anywhere nearby.

A Note on Affordability Terms

Housing affordability is discussed frequently in this briefing and in public planning conversations. The terminology can be confusing because multiple overlapping definitions are used by different agencies, developers, and advocacy organizations — and because the practical experience of affordability in a market like Sarasota does not always align neatly with the federal and state income thresholds used to define it. The definitions below are offered for reference. In practice, the lines between these categories are blurred, and individual projects may use terms differently than these standard definitions suggest.

Affordable Housing. Housing priced so that households can reasonably afford rent or mortgage costs without spending more than approximately 30% of their income on housing. This is the standard federal threshold used by HUD.

Attainable Housing. Housing designed to be within reach for working individuals and families who may not qualify for traditional housing assistance programs but still face affordability challenges in the local market. This term is increasingly used in Sarasota to describe units priced below luxury market rates but above the income thresholds for subsidized housing.

Workforce Housing. Housing intended for moderate-income workers such as teachers, healthcare staff, hospitality employees, first responders, and others who support the local economy. Often overlaps with attainable housing in practice.

Extremely Low-Income Housing (ELI). Housing serving households earning at or below 30% of the Area Median Income (AMI), often including seniors on fixed incomes and individuals with disabilities.

Very Low-Income Housing. Housing serving households earning up to 50% of the Area Median Income (AMI).

Low-Income Housing. Housing serving households earning up to 80% of the Area Median Income (AMI) under Florida housing guidelines. Many of the attainable units in DSCA's development tracker — including Lofts on Lemon Phase 2 — are committed at this threshold.

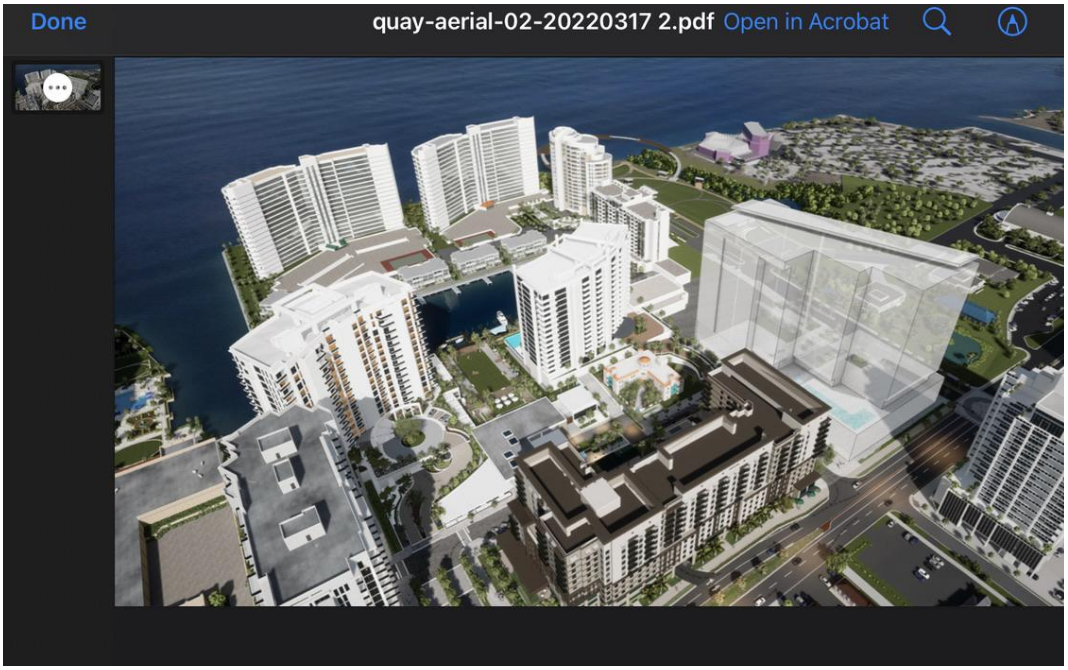
Moderate-Income Housing. Housing serving households earning up to approximately 120% of the Area Median Income (AMI), often associated with workforce and attainable housing programs.

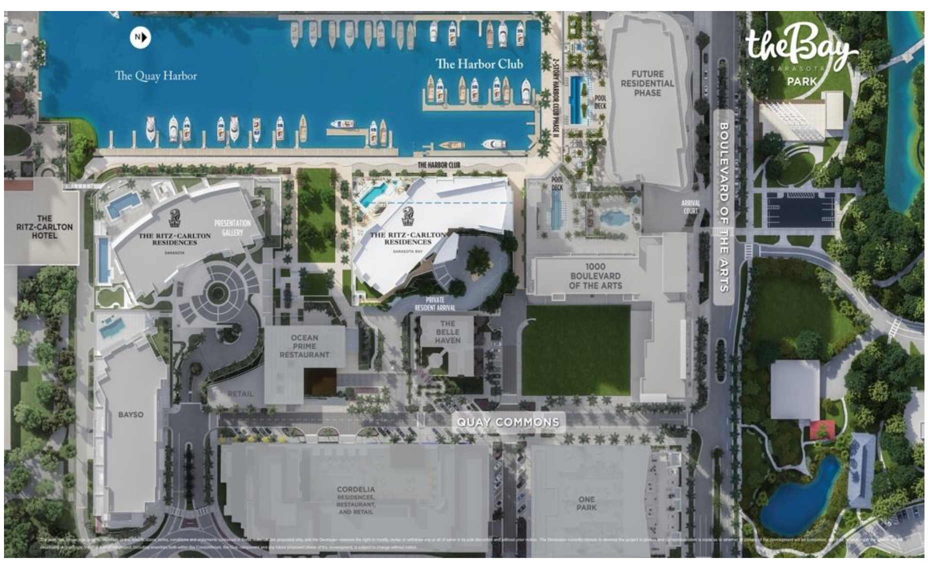
Elderly / Senior Housing. Some housing programs and developments use age-restricted designations. "Elderly" housing typically requires the head of household to be age 55 or 62 and older, depending on the specific program. The proposed McCown Tower 3 (96 units) is an example of a senior-restricted affordable project in the DSCA area.

In this briefing, DSCA uses "attainable" as a general term encompassing units that have been committed through the DRC process or other agreements at below-market rates, regardless of the specific income tier. Where a specific AMI threshold or program designation applies, we have tried to note it. The unit counts in the development tracker represent DSCA's best estimates based on publicly available DRC materials, developer representations, and city records — they should be read as approximate rather than legally binding commitments.

The Quay and West of US-41: A Bayfront Transformation

If the Rosemary District illustrates organic, incremental neighborhood growth, the Quay corridor represents something entirely different: a single, master-planned bayfront development on 14 acres that is, by scale and ambition, the most consequential private master plan development project in Sarasota's modern history.





Aerial rendering of the Quay Sarasota development looking southwest over Sarasota Bay. The Van Wezel Performing Arts Hall and Bay Park are visible at right. Source: Kolter Urban / DSCA candidate briefing February 2026.

The Quay Sarasota — formerly the site of the Quay retail stores, restaurant and various underutilized parcels along the bayfront west of US-41 between Fruitville Road and Blvd of the Arts — has been assembled and developed by Greenpoint Properties and several developers into a mixed-use bayfront district that includes luxury condominiums, market-rate apartments, restaurants, retail, and public waterfront access. It sits directly south of The Bay Park, the city's signature public park initiative on the 53 acre site containing the Van Wezel Performing Arts Hall, Sarasota Orchestra and other arts organizations. The new planned Sarasota Performing Arts Center is planned to be built on The Bay Park site.

Together with the adjoining west-of-41 properties — Beau Ciel, Condo on the Bay, the Hyatt/1000 Boulevard of the Arts redevelopment site, and the planned Ritz-Carlton Sarasota Bay II — this corridor represents the single largest concentration of residential value and future taxable value growth in the city. This area is the major portion of the property tax base for the Tax Increment Fund (TIF).

The Scale: Property Values and Projections

DSCA has assembled a detailed property-by-property valuation of the Quay and west-of-41 corridor using Sarasota County Property Appraiser data (January 1, 2025, valuations) and projections for properties currently under construction or planned. The numbers are striking:

The Quay Commons proper (approximately 14 acres) currently contains 462 residential units with a combined 2025 taxable value of $671.5 million. When One Park (86 units, topped out April 2026) and the second Ritz-Carlton tower (78 units, TCO estimated November 2026) are completed, the projected 2030 taxable value rises to $1.43 billion — more than doubling in five years.

The broader west-of-41 corridor (approximately 11 additional acres) adds another 778 existing units with $315.6 million in current taxable value, projected to reach $740.7 million by 2030 as the Hyatt Centric/1000 BotA redevelopment (117 condos plus a 174-room hotel) delivers.

Combined, the corridor's taxable value is projected to grow from $987 million in 2025 to $2.17 billion by 2030 — an increase of $1.18 billion (+119%) on approximately 25 acres. That is a taxable value density of approximately $86.7 million per acre, among the highest in the region. By 2032, with the Ritz-Carlton Sarasota Bay II (107 planned units on the old Hyatt hotel site) on the tax rolls, the corridor could approach $2.5 billion.

Key Properties

Occupied:

- Ritz-Carlton Residences Sarasota (Block 6, 401 Quay Commons): 73 units, occupied, 64% homesteaded, 2025 taxable value $335.6 million. The anchor luxury property of the Quay.
- Bayso (Blocks 4,5 301 Quay Commons): 149 units, occupied, 40% homesteaded, 2025 taxable value $174.7 million. Market-rate condo building, first to deliver in the Quay development.
- The Cordelia Apartments (Blocks 2,3, 468 Quay Commons): 240 rental units, first occupancy October 2024. 2025 taxable value $74.9 million. The Quay's rental component.

Under construction:

- One Park East (Block 1, 1100 Blvd of the Arts / 668 Quay Commons): 86 luxury condos, topped out April 2026, TCO estimated Q3 2027. Current tax value is land only ($13.1 million); projected at approximately $350 million at delivery. This is expected to be one of the most valuable single buildings on the Gulf Coast of Florida.
- Ritz-Carlton Residences Sarasota Bay II (Blocks 7,8, 555 Quay Commons): 78 units, TCO estimated November 2026. Projected value a year after delivery approximately $400 million.

Planned:

- One Park West (Block 9, Quay Commons)
- 1000 Boulevard of the Arts: 117 condos
- Hyatt Centric Hotel (1050 Blvd of the Arts) 174-room hotel. Projected 2030 value approximately $400 million (Hotel and 1000BotA towers)
- Ritz-Carlton Residences Sarasota Bay II (996 Blvd of the Arts): 107 planned condos. On tax roll approximately 2032. Land value only at present.

Why the Quay Matters for the City Manager

The Quay corridor's significance extends well beyond property tax revenue. It is where several of the city's most consequential decisions converge:

The Bay Park: The Bay Park and public waterfront access: The Quay's public infrastructure — waterfront promenades, parks, and connections to The Bay Park — creates the interface between private luxury development and public space. How that interface is designed, maintained, and governed could shape the character of Sarasota's bayfront for decades.

The Performing Arts Center: The proposed Sarasota Performing Arts Center (SPAC) is among the most consequential planning variables in this corridor. The decision on whether and how to proceed — a roughly $300 million question still under active community discussion — will shape the cultural and public-space character of the bayfront for decades. DSCA's interest is in ensuring that whatever path forward is chosen is economically sound, fits the city's broader strategic direction, and is consistent with maintaining the value proposition that current and future downtown residents depend on.

Public parking: The McCown Apartments site (1300 Boulevard of the Arts) is the last viable public parking parcel west of Central Avenue. DSCA has advocated for preserving public parking capacity in any redevelopment of this site, given the convergence of demand from the Ritz-Carlton, One Park, the future hotel, Bay Park visitors, and potential PAC attendees.

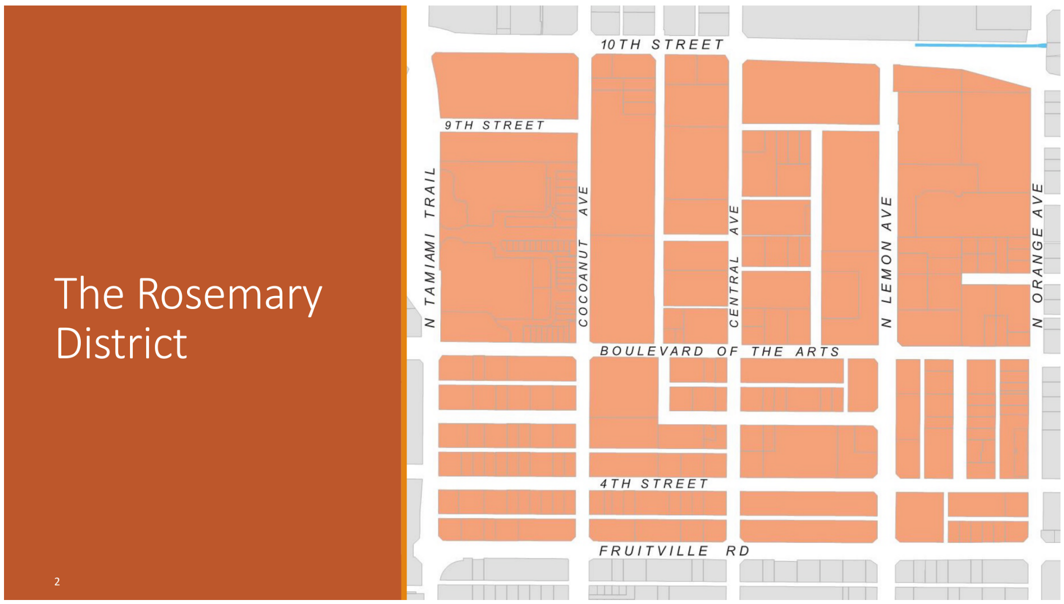
An approximate 700-car parking structure is now being proposed in the Bay Park. Details currently are still being confirmed. If constructed this structure would replace the same number of spots lost as the asphalt parking lots is removed and replace with parkland.

Connectivity: The Quay, The Bay, the future SPAC, and west-of-41 development are becoming one connected place. Their success is likely to depend on integrated planning for parking, transit, pedestrian connections, and public-realm quality — not project-by-project approvals in isolation.

The detailed property-by-property valuations and projections for the Quay and west-of-41 corridor are in the appendix.

The Rosemary District: A Neighborhood Transforming

The Rosemary District is where downtown Sarasota's transformation is most visible and most rapid. It deserves its own treatment because it illustrates, in one 130-acre neighborhood, nearly every dynamic this briefing describes: growth, density, affordability tension, construction pressure, and the question of what kind of community Sarasota is becoming.



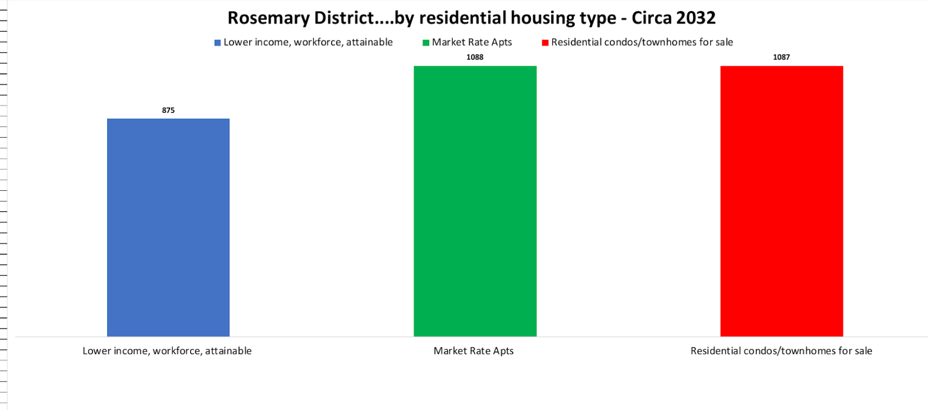
The Rosemary District: bounded by 10th Street, Fruitville Road, the Tamiami Trail, and Orange Avenue. Source: DSCA.

DSCA's Rosemary tracking shows estimated dwelling units rising from approximately 1,084 in 2015 to roughly 2,250 in 2025 — more than doubling in a decade. Projects already under construction or effectively in progress would bring the district to approximately 2,666 units by 2031. If additional DRC and planned projects are built, including Saravela (282 condos), the district could approach approximately 3,050 units — nearly triple the 2015 base.

At 1.6 residents per unit, 3,050 units translates to a Rosemary District population of approximately 4,880 people — in 130 acres (0.2 square miles). That is a population density of approximately 24,400 per square mile, comparable to dense urban neighborhoods in much larger cities.

That growth is not just a residential count. It is reshaping Fruitville Road, Boulevard of the Arts, Cocoanut, Central, Orange, and Lemon avenues. It changes the practical demand for parking, shade, pedestrian comfort, public safety, retail services, and transit options.

Rosemary is important because it is not a purely luxury district. By approximately 2032, the housing mix is projected to break down as roughly 29% lower-income, workforce, and attainable units (875 units), 36% market-rate apartments (1,088 units), and 36% condominiums and townhomes for sale (1,087 units). That three-way balance — attainable, rental, ownership — is unusual for downtown Sarasota and is part of what makes Rosemary different from the luxury-dominant districts around Golden Gate Point and the Quay.



					Lower income, workforce, attainable	Market Rate Apts	Residential condos/townhomes for sale		Total Dwelling units - Rosemary District - Circa 2032	Population at 1.6 people per unit	
			Residential Dwelling Units		875	1088	1087		3050	4880	
			Percentage of total		29%	36%	36%		100%		
	Assisted/attainable/affordabe units		Market rate apartments				Condos and Townhomes			Population/sq mile Equivilant =	24,400
	McCown Towers*	100	700 Cocoanut - CitySide		228		Renaissance Condos	243	243		
	McCown Annex*	75	650 Central		13		Alinairi	204	204	Population/acre=	38
	Jefferson Center*	209	710 Lemon - The District		286		BLVD	49	49		
	St Martha 1&2*	78	320 Central - Arcos Apts		228		Zahranda 1 and 2	24	24		
	Sarasota Opera	29	**Bayside Club - 850 Cocoanut**		253		Valencia	30	30	Rosemary Dist = 130 acres or .2 sq miles	
	Florida Studio Theatre	5	Bayside Club, North (80 of 96)		80		332 Cocoanut	32	32		
	Lofts on Lemon	128		2032	1088		Risdon on 5th	20	20	units at 2026=	2182
	Lofts on Lemon 2*	100		2026	755		The Gallery (4th and Cocoanut)	60	60		
	McCown Tower 3*	96					Melrose	10	10	density	17
	Bayside Club North, (15 of 96)	15					Rosemary Park Condos	40	40		
	Saravela (40 of 282)	40					Citrus Sq Units	32	32		
	2032	875					4th by the Bay	6	6		
	2026	624					Encore	15	15		
							4th at Cocoanut (SW corner)	16	16		
	= under construction bolded or planned						Villa Ballada - 430 Kumquat	22	22		
*	low income						7th & Central condos	24	803		
Note:	for the purposes of estimates the few single family homes are not included as most are vacant or planned for removal						Saravela (242 of 282)	242			
							333 Cocoanut	18			
							total condos and townhomes for sale 2032	1087			
							2026	803			

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Rosemary District dwelling units by residential housing type, projected circa 2032. Source: DSCA Rosemary District analysis, May 2026. (larger spreadsheet in Appendix C)

Key attainable projects in the district include McCown Towers and Annex (175 units), Jefferson Center (209 units), Lofts on Lemon Phases 1 and 2 (228 units combined, with Phase 2 at 100% <80% AMI), and the proposed McCown Tower 3 (96 senior apartments, county funding approved May 5, 2026). These represent a meaningful anchor of affordability in a neighborhood where market-rate rents and condo prices are rising rapidly.

The takeaway. Rosemary is the only district in downtown Sarasota where all three housing markets — income-restricted, market-rate rental, and ownership — coexist at meaningful scale. Most of downtown is becoming a single-segment market dominated by luxury ownership. Rosemary is not. That makes the district the most important practical test of whether downtown Sarasota can grow without becoming a single-income enclave — and whether the city's investments in infrastructure, transit, and public space can keep pace with a neighborhood that is densifying faster than any other in the city.

The detailed unit-by-unit accounting for the Rosemary District is in Appendix C, including the projected 2032 housing type breakdown and the population density estimate.

Golden Gate Point: Largely Built Out

Although Golden Gate Point is no longer officially recognized as being within the DSCA boundary, it is summarized here for purposes of an unofficial downtown residential picture. Physically and functionally, Golden Gate Point remains part of the downtown ecosystem: it connects directly to the bayfront, Main Street, the Quay, and the city's larger downtown traffic and service network.

Golden Gate Point is different from the Rosemary District and the Quay. It is a small, mature residential peninsula, and with construction underway or expected to occur, it is largely built out. DSCA's March 2026 summary identifies 271 current dwelling units, 93 units under construction, and 12 planned units, for a total of approximately 376 dwelling units circa 2030.

Measure	Count	Notes
Existing dwelling units	271	Across 21 existing buildings/properties
Under construction	93	The Owen (29), Amara (54), and SIX 88 (10)
Planned / final site-plan sign-off	12	The Point, 625 Golden Gate Point
Total units circa 2030	376	Largely built out after current pipeline
Total buildings/properties tracked	28	21 existing; 6 under construction; 1 planned

Source: DSCA Golden Gate Point dwelling-unit summary, March 24, 2026.

The practical city-management issues for Golden Gate Point are therefore less about large future growth and more about construction impact during the remaining buildout, traffic and parking on a constrained peninsula, emergency access, resilience, pedestrian connections to the bayfront and Main Street, and maintaining compatibility as older small buildings are replaced or renovated.

Density: The Number That Changes Everything

The preceding sections count buildings, units, and dollars. This section looks at what those numbers mean when concentrated in a small geography — and why density, more than any other single metric, determines what kind of infrastructure, services, and governance downtown Sarasota actually requires.

Downtown Sarasota's density numbers should reframe how the area is understood from an operational and investment standpoint. Service delivery, transportation, parking, public safety, utilities, mobility, and public space needs are different in a compact downtown than in lower-density parts of the city or county. Downtown is not suburban in form or function. It is a compact, high-value, high-intensity urban area within a mid-sized Florida city.

Taxable Value Per Acre

The Quay corridor currently generates approximately $39.5 million in taxable value per acre on its roughly 25-acre footprint. By 2030, as One Park, the second Ritz-Carlton tower, and the Hyatt/1000 BotA redevelopment deliver, that figure is projected to reach approximately $86.7 million per acre — among the highest per-acre taxable values in the region and arguably on the Gulf Coast of Florida.

For comparison: a typical suburban acre in unincorporated Sarasota County with single-family homes generates roughly $500,000 to $1.5 million in taxable value. A well-developed commercial corridor might reach $5–10 million per acre. The Quay at $86.7 million per acre is generating fiscal value at 60 to 170 times the rate of suburban residential land. That is the fiscal argument for downtown in a single number.

The broader DSCA area — 1.8 square miles containing approximately $2+ billion in combined taxable value from residential properties alone — is one of the city's most fiscally productive geographies. This suggests that underinvesting in downtown's infrastructure could carry its own form of fiscal risk.

Population Density

The Rosemary District is approaching a projected population density of approximately 24,400 people per square mile when current and planned projects are built out (approximately 4,880 people on 130 acres, or 0.2 square miles).

For context: the Rosemary District, in a mid-sized Florida city, is approaching a population density associated with dense urban neighborhoods in much larger metropolitan areas. The broader DSCA area — 14,000+ seasonal residents in 1.8 square miles — operates at approximately 7,800 people per square mile, comparable to dense inner suburbs and urban districts.

The Quay corridor is even more concentrated: approximately 500 existing units on 14 acres of Quay-proper land translates to roughly 1,400 people at 100 people per acre. With the pipeline buildout, that density is likely to increase substantially.

These are not suburban densities. They are urban densities that suggest a need for urban-scale infrastructure, services, and governance approaches — in a city whose service model was built for a very different scale.

The Transportation Implication

At the densities downtown Sarasota is approaching, car-dependent infrastructure reaches its physical and economic limits. The math is straightforward: 929 units under construction plus ~1,992 in DRC review equals about 2,900 new units. At even 1.0 cars per unit (well below the typical 1.5–2.0 for Florida households), that is 2,921 additional cars seeking parking, road space, and access in a geography that is already constrained.

The existing parking infrastructure downtown was designed for a smaller residential population supplemented by daytime commercial and visitor demand. The pipeline represents a fundamental change in the demand profile: 24-hour residential parking that does not turn over, layered on top of commercial and visitor demand. Providing parking at suburban ratios becomes extremely difficult on constrained infill sites and economically challenging at structured parking costs of $30,000–50,000+ per space.

This is part of the practical case for exploring downtown micro-transit and circulator service. It is not a luxury or an amenity — it becomes a practical necessity as the pipeline delivers. A downtown circulator connecting the Quay, Rosemary, Main Street, The Bay Park, and the proposed performing arts center could help reduce per-unit parking demand, improve quality of life for residents who choose not to drive (including the growing 65+ population), and make the downtown footprint function as one connected neighborhood rather than a collection of isolated projects each solving its own parking problem independently.

SRQ airport's expansion to 67 nonstop destinations and 2.5 million additional annual passenger capacity further amplifies this dynamic. More visitors arriving directly into Sarasota need ground transportation options that do not depend on rental cars competing for the same constrained parking and road space.

The Governance Implication

Downtown Sarasota is one of approximately 30 neighborhoods in the city's Coalition of City Neighborhood Associations (CCNA). But it contains roughly 25% of the city's population, an approaching 35%+ share of the tax base, and fundamentally different infrastructure needs than any other neighborhood in the coalition. Traditional neighborhood issues — historic preservation, single-family zoning, traffic calming — differ significantly from the high-density concerns of downtown: elevator safety, emergency response planning for high-rises, utilities at scale, structured parking management, and construction impact on vertical neighbors.

The in season approximately 14,000 downtown residents represent one of the most concentrated urban residential populations in the region. The composition of downtown housing — condo vs. rental, small vs. large units, price tiers — directly shapes who lives downtown and what services they need. The Downtown Master Plan update presents a critical opportunity to set explicit targets for downtown: not just density and building height, but desired age mix, income diversity, and household composition.

Sources: DSCA building database March 2026; Sarasota County Property Appraiser 2025 valuations; DSCA Rosemary District dwelling unit projections May 2026 (D. Lough); density calculations by DSCA; U.S. Census Bureau density context.

The Development Pipeline

What is actively under construction or in the city's approval process — and the scale of change it represents.

Downtown Sarasota is experiencing the most significant residential buildout in its history. As of May 6, 2026, DSCA's development tracker records 929 units under active construction, with an additional approximately 1,992 units in the city's DRC approval process — a combined pipeline of 2,921 new dwelling units. At 1.6 residents per unit, that represents a projected increase of approximately 4,673 people over the current downtown base — roughly one-third growth in the in-season population.

The pipeline is predominantly rental in the units currently under construction (584 apartments vs. 345 condos/townhomes), but the DRC pipeline leans toward ownership (approximately 1,233 condos vs. 759 apartments in review). The mix will shift significantly when major ownership projects — One Park, Waldorf Astoria, Ritz-Carlton Tower 3, Saravela — deliver.

More than 65% of new residential development in the city is occurring in the greater downtown area, much of it on constrained infill sites with limited room for construction staging, worker parking, deliveries, and neighborhood buffering. The scale of simultaneous construction is unprecedented for downtown and creates real quality-of-life pressure on existing residents.

Units Under Construction — May 2026

Project	District	Type	Units	Of Units, Attainable	Status
The Edge Condos, 290 Cocoanut	Downtown	Condo	27	—	Topped out; TCO late 2026
McGillicuddy/FST Arts Plaza	Downtown	Rental	24	24	Vertical construction underway
Sērēn Sarasota, 200 S. Wash	Downtown	Rental	50	—	CO anticipated late 2026
The Gallery, 1329 4th	Rosemary	Condo	61	—	Topped out; CO late 2026
Bayside Club Apts, 850 Cocoanut	Rosemary	Rental	253	—	Topped out ~50% complete
Aspire on Tenth, 1313 10th	Rosemary	Rental	157	47	CO likely June 2026
Lofts on Lemon Ph.2	Rosemary	Rental	100	100	100% attainable; topped out
Ritz Carlton Residences	Quay	Condo	78	—	TCO est. Nov 2026

One Park, 668 Quay	Quay	Condo	86	—	Topped out 4/2026
Amara (Pier 550)	Golden Gate	Condo	54	—	Construction started
The Owen, 325 GGP	Golden Gate	Condo	29	—	In progress
SIX 88, 688 GGP	Golden Gate	Condo	10	—	In progress
TOTAL	—	**345 / 584**	**929**	**171**	**As of May 6, 2026**

Source: DSCA Development Tracker, May 6, 2026 (DL). City of Sarasota Dev Services weekly reports, DRC materials, building permits. Does not include Gillespie Park.

Affordability note: The attainable column is a subset of the Units column and should not be added to the total unit count. Of 929 units under construction, 171 (18%) are attainable or affordable. Lofts on Lemon Phase 2 (100 units, 100% at or below 80% AMI) is the standout project. Aspire on Tenth adds 47 attainable units. The FST Arts Plaza (24 units) is a unique arts-workforce model. There is no binding inclusionary zoning — all commitments are individually negotiated through the DRC process.

Units in DRC Approval Process — May 6, 2026

The following projects have received full or partial DRC sign-off, or have active applications in review. Unit counts and timelines are estimates subject to change.

Project	Type	Units	Of Units, Attainable	Status
Adagio, 1360 Ringling	Mixed	172	69	Application complete 10/25
Mira Mar	Condo	70	—	Zoning approved
Waldorf Astoria (~7 attainable)	Condo	86	7	Full DRC sign-off 5/2026
High Line, 31 N. Osprey	Mixed	142	16	Partial DRC sign-off
Sarasota Station, 300 Audubon	Mixed	271	202	Approval letter sent
Artist Court, 200 S. Washington	Rental	242	26	Demo complete; status in flux
Saravela, 5th and 41	Condo	282	40	Partial DRC sign-off

McCown Tower 3, 1300 BotA	Rental	96	96	County funding approved 5/5/26
Hyatt/1000 BotA	Mixed	117	—	Demo largely complete
Ritz-Carlton Tower 3	Condo	107	—	Planned
Bayside North, 1250 10th	Rental	96	15	Full DRC sign-off
Other projects (various)	Mixed	~211	~73	Various DRC stages
TOTAL (approx.)	—	**~1,992**	**~544**	**As of May 6, 2026**

Source: DSCA Development Tracker, May 6, 2026. Full tracker in Appendix A. Attainable counts shown are included within the Units total, not added to it.

Recently completed (for context): Aster and Links, 1991 Main (~440 units); The Cordelia at Quay Commons (240 units); DeMarcay condos (39 units, first downtown project with car elevators); The Peninsula on Golden Gate Point (20 units); Villa Ballada (22 units). Combined approximately 770 units recently added to downtown's existing stock — the base on which the current pipeline builds.

Downtown's Real Estate Market: The Value Proposition

The preceding sections describe what downtown has (inventory), what will possibly be built (pipeline), and how dense it is becoming. This section looks at what it is worth — and what the sales data tells us about the value proposition that drives people to choose Sarasota over other high-amenity coastal markets.

People moving to downtown Sarasota are making a choice, not responding to a job transfer. At a 2025 median sale price of $1.24 million and $731 per square foot, downtown Sarasota is a premium market that competes with Naples, Palm Beach, Charleston, and Santa Fe for affluent buyers who could live anywhere. The question those buyers are answering — consciously or not — is whether Sarasota's arts, beaches, walkability, dining, cultural institutions, and quality of life are worth the price. That question is also the city's most important long-term fiscal question.

10-Year Sales Data: A Structurally Distinct Market

Property appraiser records compiled by DSCA over the past decade show a downtown real estate market that is structurally distinct from the rest of the city — consistently more expensive on a per-unit and per-square-foot basis, and trending toward a luxury-tier profile that the broader Sarasota market is not.

The headline numbers.

- $1.24 million: downtown median sale price in 2025.
- $731 per square foot downtown vs. $495 citywide — a 48% premium.
- 2.1x: the downtown-to-city median price ratio, which has been remarkably stable for a full decade.

Five Observations from the Data

1. The premium is structural, not cyclical. The downtown-to-city price multiple has been stable at approximately 2.1x for a decade. This is not a sudden divergence or a bubble. Downtown has been a structurally distinct market for the entire 10-year window. What is changing is the absolute gap: $279,000 in 2016 has widened to $649,000 in 2025. As luxury construction at the Quay, One Park, and Waldorf Astoria delivers, this gap is expected to widen further.

2. The per-square-foot premium is consistent. Downtown sells for a 48% premium per square foot — $731 vs. $495 citywide in 2025. The premium has held within a 35–55% range every year since 2016, indicating the spread is driven by location value and building quality, not market timing.

3. Downtown generates 36% of citywide dollar volume. Despite representing roughly 20% of unit sales, downtown has consistently accounted for 27–48% of the city's total residential transaction dollars across the decade. This underscores downtown's outsized contribution to the city's tax base.

4. Downtown and citywide prices diverged in 2025. In 2025, the downtown median price rose (+4.8%) while the citywide median fell (−15.7%). Both markets saw sharp declines in unit volume and dollar volume. But the price lines tell two different stories: the city's median fell back to roughly 2022 levels, while downtown's median continued to climb. This is consistent with a stratifying market in which the upper tier holds price even as broader activity slows.

5. Internal stratification is widening. The aggregate downtown numbers conceal a widening internal gradient. Newer construction commands premium prices and is largely insulated from carrying-cost pressures. Older downtown buildings — many with 8-foot ceilings, dated layouts, and limited amenity programs — face rising HOA fees, special assessments driven by post-Surfside reserve requirements, and higher insurance costs. The result is a widening price-and-desirability gradient within downtown itself. Older buildings could increasingly serve as a de facto workforce-affordable tier — or, less constructively, become a segment under sustained value pressure.

The Value Proposition Question

Downtown Sarasota's real estate market is, at its core, a referendum on the city's attractiveness. Buyers paying $1.24 million median and $731 per square foot are not purchasing a house — they are purchasing a lifestyle proposition built on arts, culture, walkability, restaurants, beaches, medical care, safety, and climate. That proposition has sustained a 2.1x price premium for a decade.

But the proposition is not self-sustaining. It depends on continuous public and private investment in the amenities that justify the premium: well-maintained streets and sidewalks, a vibrant arts scene, functioning parking and transit, attractive public spaces, responsive code enforcement, and a sense of community safety. If those amenities erode — through underinvestment, construction fatigue, noise, or declining quality of life — the premium erodes with them. And because Sarasota's population is entirely migration-dependent, an eroding value proposition does not simply slow growth. It risks reversing the flow entirely.

A Note on the 2025 Market

The 2025 declines in unit volume (−33% citywide, −53% downtown) and dollar volume (−34% citywide, −48% downtown) are real but should be read with context. An estimated 70% of downtown sales are cash transactions, so elevated mortgage rates — the dominant national factor — are a smaller drag here than elsewhere. Other factors are at work: insurance and post-Surfside reserve assessments have raised carrying costs, particularly in older buildings; the 2024 storms affected market sentiment; and a meaningful share of the most expensive inventory (Ritz-Carlton 555 Quay, One Park) is in pre-sale status and will not register in closed-transaction data until 2026–2027.

One senior downtown real estate professional estimates that more than 30 months of condo inventory is currently on the market or coming to market — a meaningful overhang that may weigh on transaction velocity even if underlying demand holds.

Read together, this suggests 2025 reflects cooling rather than collapse — and that the cooling is driven more by carrying costs, supply timing, and pre-sale lag than by demand fundamentals.

A note on the data. DSCA began tracking downtown real estate sales data approximately six years ago using a consistent methodology applied across the full period. We are confident in the reliability and comparability of the data through 2024. As we moved into 2025, changes in the composition of available sales data — including the growing share of pre-sale transactions, the entry of ultra-luxury inventory that skews medians, and shifts in how some transactions are recorded — made us less confident that the 2025 figures are directly comparable to prior years using the same methodology. DSCA has since paused its independent tracking rather than publish figures we cannot fully stand behind. The 2025 numbers presented here should be read as directionally useful but less precise than the 2016–2024 series. We believe the 10-year trends through 2024 are the most reliable basis for understanding the structural character of downtown's real estate market.

Source: Sarasota County Property Appraiser sales records 2016–2025; MLS data via DSCA real estate market analysis, January 2026 (D. Lough). Data deemed reliable but not guaranteed. Charts showing 10-year trend lines for sales price/sq ft, median price, units sold, and dollar volume are available from DSCA.

Connectivity: Linking Downtown's Neighborhoods

Downtown Sarasota is not one place. It is a collection of distinct districts — the Rosemary District, the Quay bayfront, Golden Gate Point, the Main Street core, East Main — that are currently connected more by proximity than by design. As density increases and the pipeline delivers thousands of new residents, the quality of the connections between these districts becomes a defining issue for downtown's livability and economic success.

For a city manager looking at downtown Sarasota as an operating environment, the scale may look small. Downtown Sarasota is 1.8 square miles. But within that footprint, the barriers to movement — US-41 (Tamiami Trail), Fruitville Road, inadequate sidewalks, missing shade canopy, and the simple absence of safe, comfortable pedestrian connections — create a fragmented experience. Main Street, Boulevard of the Arts, 10th Street, Fruitville Road, The Bay Park, and the Quay need to function as parts of the same downtown network.

Public Transportation and Micro-Transit

This discussion is intentionally brief, but the point should not be missed. As downtown density increases, Sarasota will likely need more than better sidewalks, safer crossings, and fixed-route bus service. Public transportation options should be part of the connectivity discussion.

DSCA has informally raised the idea that the time may be right to consider micro-transit options that complement, rather than replace, existing fixed-route bus service and the Bay Runner trolley. The idea would be to test whether smaller, more flexible transportation options - such as app-hailed electric vehicles, point-to-point shuttles, or short-loop circulator vans - could help connect the Quay, Rosemary District, Main Street, The Bay Park, Burns Court, Golden Gate Point, and other near-downtown destinations.

The case for looking at this is practical. Downtown has roughly 7,100 existing residential units, with nearly 3,000 more units under construction or in the DRC process. Many short trips within downtown are too long to be comfortable walks, especially in heat or rain, but too short to justify another car trip. Parking pressure is already growing in the Rosemary District, near Burns Court, around Main Street, and in areas that will serve The Bay Park and a potential new performing arts center.

The economics of car dependence are also changing. Kelley Blue Book reported the average new-vehicle transaction price at approximately $49,275 in March 2026, while AAA listed the Bradenton-Sarasota-Venice average regular gas price at roughly $4.27 per gallon as of May 13, 2026. Those numbers will move, but they underscore the broader point: transportation costs are becoming a larger issue for residents, workers, and visitors.

A modest pilot could be considered without making a long-term commitment. DSCA's earlier micro-transit presentation suggested several possible models: expanding Breeze OnDemand coverage, increasing frequency on selected fixed bus routes, testing small electric point-to-point vehicles, or using circulator EV vans on frequent downtown loops. The larger point is that downtown connectivity should not be treated only as a road, sidewalk, or parking issue. As density increases, Sarasota may need a layered mobility system: walking, biking, the BayRunner, fixed-route buses, Breeze OnDemand, and potentially a small-scale micro-transit pilot designed specifically for short downtown trips.

Sources: DSCA micro-transit presentation, June 9, 2025; Kelley Blue Book / Cox Automotive March 2026 average transaction price report; AAA Gas Prices, May 13, 2026.

Boulevard of the Arts and 10th Street

Boulevard of the Arts and 10th are the east-west spines connecting the Quay and Bay Park area through the Rosemary District to Orange Avenue, the entry point for the Gillespie Park neighborhood. Both corridors have been identified in DSCA's streetscape advocacy and in the Sarasota in Motion Transportation plan as needing improved pedestrian conditions, shade, and traffic calming.

The convergence of these corridors with Fruitville Road in the Rosemary District creates a natural opportunity for a connected network of walkable streets — rather than a series of isolated improvement projects. DSCA has consistently advocated for treating these corridors as a system, not as individual capital projects competing for limited funding.

Main Street Complete Streets

Main Street is the civic and commercial center of downtown Sarasota. Its role is different from Boulevard of the Arts, 10th Street, and Fruitville Road because it is not simply a connector. It is also a place where people shop, eat, meet, walk, and spend time.

The City of Sarasota's Main Street Complete Streets project is now moving into the design phase. Community priorities have been translated into three conceptual design options intended to show the overall look and feel for Main Street. They are not final materials or specific amenities, but they create an important opportunity for residents, businesses, and stakeholders to help shape how Main Street will function and feel for years to come.

For DSCA, the importance of this project is straightforward: a stronger Main Street supports everyday life for residents and visitors, helps local businesses, and reinforces downtown as a walkable, welcoming place. As more residents live downtown full time, Main Street becomes less of a visitor corridor and more of a daily neighborhood street.

Source: City of Sarasota Main Street Complete Streets public meeting notice.

The Bay Park Connection

The Bay Park — the signature public park initiative on the former Van Wezel site and surrounding bayfront land — is becoming the western anchor of downtown's public realm. Its success depends not just on the quality of the park itself but on the quality of the connections that bring people to it: from the Rosemary District via Fruitville, from Main Street via the existing street grid, from the Quay via the waterfront promenade, and from SRQ airport via ground transportation.

The Quay, The Bay Park, the proposed performing arts center, and the Rosemary District are becoming one connected place. But that connection exists more in concept than in physical reality. The Downtown Master Plan update is the logical vehicle for designing that connectivity — not as an afterthought to individual development approvals, but as a primary organizing principle.

Fruitville Road: The East-West Spine

Fruitville Road is the primary east-west corridor connecting the Rosemary District, the downtown core, and the US-41 crossing to The Bay Park and the Quay. It was identified as a priority project in the Sarasota in Motion Master Transportation Plan (2020) — not an ad hoc request but an agreed element of the city's adopted mobility framework.

In its current condition, Fruitville Road is a barrier rather than a connector. It is wide, auto-dominated, uncomfortable for pedestrians, and does not reflect the character of the residential neighborhoods it now runs through. The Rosemary District is adding thousands of residents on the north side of Fruitville. The Bay Park and the Quay are generating major foot traffic and visitor activity at its western terminus. The performing arts center, if sited in the bayfront area, would further intensify pedestrian demand along this corridor.

A complete streets redesign of Fruitville Road between US-41 and US-301 — with enhanced sidewalks, shade trees, protected crossings, and a more balanced allocation of space between cars, pedestrians, and cyclists — would do more to unify downtown Sarasota's neighborhoods than any single infrastructure project currently under discussion. A coalition of community stakeholders submitted a letter to the City Commission in August 2025 making this case, noting that an improved Fruitville Road "would be more than a safety or mobility upgrade — it would be a long-term economic driver."

The Funding Challenge

One question worth raising is whether the city's current model for funding capital improvement projects — relying primarily on Penny Tax revenue, multimodal transportation impact fees, and competitive grants — is keeping pace with the connectivity infrastructure downtown is generating demand for. Hurricane damage has pushed previously funded projects further behind schedule, and the funding sources themselves have limits and uncertainties.

With approximately 1,000 residential units under construction and another 1,500+ in the pipeline, the city's tax base is growing and multimodal fees, continue to come in. At the same time, capital project delivery is constrained by available cash flow. The trade-offs between pay-as-you-go funding and other approaches involve real fiscal considerations — particularly in the current environment of property tax uncertainty — and are appropriately decisions for the city to weigh. DSCA's interest is in surfacing the question of whether the pace of infrastructure investment is keeping up with the pace of development, not in prescribing a particular financing approach.

The broader observation is that some infrastructure is not just a cost — it is an investment that generates returns in property values, quality of life, and the continued attractiveness that keeps Sarasota's migration pipeline flowing. Well-planned transportation, walkable streets, shaded sidewalks, safe crossings, parks, and public spaces help attract new residents, replace residents who leave the pool over time, and keep current residents invested in Sarasota.

Downtown as an Operating Environment

Downtown Sarasota is not just a planning area. It is a complex daily operating environment.

As residential density increases, city management issues become more practical and more immediate. Construction staging, sidewalk closures, right-of-way management, traffic control, noise, deliveries, special events, code enforcement, trash collection, parking, and public safety all affect residents' daily lives.

Many downtown residents live in vertical neighborhoods. A street closure, utility disruption, elevator outage, fire alarm, or construction impact can affect hundreds of people in a single building. Seasonal residents may be away for part of the year and rely on building managers, condo boards, or neighbors for timely information.

This creates a need for strong coordination across city departments. Planning, Development Services, Public Works, Police, Parking, Code Compliance, Parks and Recreation, and the City Manager's Office all touch downtown conditions. Residents often experience the city as one system, even when responsibility is divided among departments.

The Downtown Retail Opportunity

Downtown Sarasota is approaching a level of residential density that creates new retail opportunities. The Quay, Waldorf Astoria, Mira Mar, the Rosemary District, The Bay Park, Main Street, and the possible performing arts center together could support a stronger and more varied downtown retail environment.

But the right retail mix may not happen entirely on its own.

Downtown has many restaurants, service businesses, and visitor-oriented uses. What is less developed is a broader mix of useful, interesting, and distinctive retail that serves residents, visitors, cultural patrons, and hotel guests. As more people live downtown year-round, the opportunity for better retail grows.

This is not simply a private-market issue. The city, DID, Chamber, property owners, developers, and residential groups all have an interest in a downtown retail environment that feels active, useful, and distinctive. Other cities have used targeted retail recruitment, district management, tenant curation, and small-area strategies to improve the retail mix in their urban cores.

DSCA does not suggest that the city should control retail outcomes. But we do believe the city can help convene the right parties, support data gathering, and encourage a more intentional approach. The coming wave of new residents, hotel guests, cultural activity, and bayfront investment creates a window of opportunity.

Tourism and Visitors: Downtown's Other Population — and Its Pipeline of Future Residents

The preceding sections describe the people who live downtown. This section describes the people who visit it — and why, for a downtown still adding residents and businesses, the visitor is worth understanding as more than a source of spending. Tourism is measured and managed at the county level, but downtown Sarasota carries a disproportionate share of the county's hotels, cultural venues, restaurants, and event activity, so the visitor economy is part of the daily operating reality of the downtown the city manages.

The figures below are countywide, drawn from official sources: Visit Sarasota County (whose research is conducted by Downs & St. Germain Research), the Sarasota County

Tax Collector, and the Sarasota Manatee Airport Authority. Sarasota County does not break visitor statistics out by municipality, and we do not attempt to do so here. We present them because the visitor economy shapes downtown's streets, parking, cultural calendar, and tax base in ways that are easy to overlook when planning is framed only around residents.

A Market in Flux

One framing point belongs up front. The numbers in this section describe a market in transition, and it is too early to know how it lands. The open question is whether the recent softening is just a return to pre-COVID normal — after the unusually high visitation of 2021–2022, when beaches and open-air parks made Sarasota a pandemic-era refuge — or the start of something more lasting.

The early-2026 data complicates the picture more than it clears up. Through the first half of fiscal 2026 (October 2025–March 2026), visitation in paid accommodations was down about 4.4%, but the monthly numbers diverge from that headline: visitor counts fell sharply in January, then returned to modest growth by March — even as spending stayed flat and average lodging rates hit record levels (the month-by-month figures are in the appendix).

Visit Sarasota County's own leadership reads this as a *"K-shaped" visitor economy*: affluent travelers continuing to spend freely while more budget-conscious visitors pull back. That single observation ties together several threads in this section — the "quality over quantity" strategy, the pattern of rising room rates alongside softer occupancy, and (as discussed later) the price-sensitive families who follow youth sports to lower-rate hotels outside the city. Fewer but higher-spending visitors is not only a strategy; in early 2026 it is increasingly the market's actual shape.

Worth noting, too, that this is not a tourism quirk — it is the local face of a national pattern that is drawing growing attention. By one widely cited estimate (Moody's Analytics), the top 10% of U.S. earners now account for roughly half of all consumer spending, a record in data going back to the late 1980s and up from about 43% in 2020. (Some economists dispute the precise figure, and it refers to consumer spending rather than GDP, but the direction is not in question.) For a destination that increasingly markets to higher-spending visitors, that concentration is a double-edged sword: it supports today's spending levels but ties more of the visitor economy to a narrower band of households whose confidence can shift quickly.

Several forces are working in different directions. Travel costs are a real headwind: beginning in spring 2026, a sharp spike in oil prices tied to Middle East conflict pushed airlines worldwide to add fuel surcharges and raise fares, with U.S. carriers warning of further double-digit increases and some trimming routes — and the path from here is genuinely uncertain, since fares depend on a conflict and an oil market no one can predict. Higher airfares work against visitation. But other forces may work in Sarasota's favor: with European travel now markedly more expensive, the share of U.S. travelers planning a European vacation has fallen to its lowest level in years, and the resulting preference for value-conscious domestic trips is exactly what a Florida beach-and-culture destination can capture. Domestic leisure travel is, in fact, the one segment of the U.S. travel economy now running above its pre-pandemic level.

Layered on top is international politics — border policy, currency, and sentiment — which is plainly affecting inbound U.S. travel, including from Canada, Sarasota's largest international market. We note it because it is real, but *we make no attempt to forecast it*. The practical takeaway: treat the figures below as current but provisional, and recognize that Sarasota's exposure is lopsided — more to gain from the domestic shift than it can do about the international decline.

The Scale of Visitation

In fiscal year 2025 (October 2024–September 2025), the headline figures for Sarasota County were:

- **~2,710,700 visitors** — down about 6.3% from the prior year, but still close to six times the county's ~460,000 permanent residents.
- **~$3.6 billion** in total economic impact.
- **~21,200 local jobs supported** — roughly one job for every 95 visitors.

Visit Sarasota County describes the FY2025 dip as a "normalization" rather than a downturn — a return toward pre-pandemic patterns after the unusually high visitation of 2021–2022, compounded by the 2024 hurricane season (Helene and Milton). The organization's stated strategy is now *quality over quantity*: fewer visitors who spend more.

One value of tourism that rarely makes the headline figures deserves emphasis: it smooths seasonality. A downtown busy only in the high winter season is harder to sustain — for restaurants, retail, venues, and their workforce — than one with steadier year-round demand. Much of Visit Sarasota County's marketing targets the shoulder and off-season months precisely to fill that gap. Smoothing the curve is not a side benefit but a central objective of a well-run visitor economy, and it is where certain segments — sports especially — matter most.

These figures also fund a meaningful public benefit. The 6% Tourist Development Tax ("bed tax"), paid by visitors rather than residents, raises roughly $48 million a year countywide — estimated to offset about $583 per county household in taxes annually — and is restricted by law to tourism-related uses such as beaches, arts and culture grants, and spring-training facilities, much of which doubles as resident infrastructure. (A three-year trend table and notes on the bed tax appear in the appendix.)

What Kind of Visitor: The Shift Toward Experiential Travel

The strategy of "fewer visitors spending more" points to a broader change in what people travel for. Across the industry, demand is shifting from passive sightseeing toward experiential travel — visitors who come for culture, learning, food, nature, and a sense of place, and spend accordingly. This is the higher-value, lower-volume visitor Sarasota is best equipped to attract, downtown is where most of that experience happens, and it is the visitor most likely to come back and — per the "front porch" logic below — eventually put down roots.

Sarasota's distinctive draw beyond it's beaches for this visitor is its depth of cultural and place-based assets, several of them downtown or within minutes of it:

- **A genuine arts scene.** Theater, opera, ballet, orchestra, galleries, and a year-round events calendar give Sarasota a cultural density well out of proportion to its size — a reputation as Florida's cultural coast that does real marketing work and anchors cultural tourism.
- **Marie Selby Botanical Gardens.** A signature downtown bayfront attraction drawing more than 300,000 visitors a year, now mid-way through a transformative three-phase expansion (Phase One opened in 2024 as the world's first net-positive-energy

botanical garden complex; Phase Two broke ground in December 2025) — exactly the immersive, place-based experience the experiential traveler seeks.

- **Mid-century modern architecture.** The Sarasota School of Architecture is an increasingly recognized heritage-tourism niche — a draw for design-minded visitors and an under-leveraged story that distinguishes Sarasota from interchangeable beach destinations.
- **The Bay Park — a current and emerging draw.** The 53-acre, ~$200 million bayfront park is already drawing visitors and residents to its first 10-acre phase (open since 2022), with year-round free programming. More is close behind: the new Plaza gathering-and-performance space opens this October (2026), and renovation of the 1938 Municipal Auditorium — a WPA-era art deco landmark — begins mid-2026. As the park builds out, it is becoming a destination people come for, not just a backdrop.
- **A dining and culinary identity.** Downtown's restaurants are themselves a destination, and food is now one of the leading reasons the experiential traveler chooses one place over another.

The point for city leadership: these assets are not amenities sitting alongside the visitor economy — increasingly they are the visitor economy, and the reason a higher-spending, more loyal visitor chooses Sarasota at all.

Tourism as the "Front Porch": Visitors Today, Residents and Businesses Tomorrow

The most strategic reason to pay attention to visitation has little to do with what tourists spend this year. Visit Sarasota County's own leadership frames tourism as *"the front porch of economic development"*: a visit is how most people first encounter Sarasota, and a meaningful share of today's visitors become tomorrow's residents, second-home owners, relocating businesses, and donors. The agency describes the dynamic plainly — a visit inspires someone to trade a suitcase for a moving box.

This is the test-drive economy, and it matters disproportionately for downtown. People do not relocate to a county sight unseen; they come first as visitors, stay in a downtown hotel, walk Main Street, eat at the restaurants, take in a performance, and decide whether they can picture themselves living here. Downtown is the showroom. Every resident the briefing counts in the residential inventory, and a large share of the buyers in the development pipeline, almost certainly passed through that showroom first. A weak or unwelcoming visitor experience is therefore not merely a lost hotel night — it is a lost future resident, a relocating employer who chose elsewhere, a philanthropic gift that never materialized.

The implication: the things that make downtown pleasant for visitors — walkability, livable street life, cultural offerings, ease of arrival and parking — are the same things that recruit the residents and businesses the city wants. The visitor economy and the residential-growth story are the same funnel viewed at two stages.

The Airport: An Increasingly Powerful Front Door

The clearest reason that funnel keeps growing is Sarasota Bradenton International Airport (SRQ), four miles north of downtown. SRQ closed calendar year 2025 with a record 4,514,781 passengers, up 6.34% over 2024 and past 4.5 million for the first time — the latest in a multi-year run of record growth that has made it one of Florida's fastest-growing regional airports.

The airport now hosts 11 airlines serving roughly 68 nonstop destinations across the Midwest, Northeast, Southeast, and beyond, anchored by a new $100 million, five-gate Concourse A that opened in January 2025. Each new nonstop route is, in effect, a new pipeline of potential visitors — and Visit Sarasota County pairs new flights with targeted marketing in those origin cities precisely because each one is a fresh audience of people who might “kick the tires.”

The strategic point for city leadership is direct: airlift is the single biggest lever on how easily future residents, relocating businesses, and visitors can reach Sarasota, and it is largely outside local control. When SRQ adds a nonstop city, downtown gains a new feeder market for hotel nights, cultural patronage, and — over time — relocation. When seasonal Canadian or other international service contracts, downtown feels it block by block. A growing, well-run airport four miles from Main Street is one of downtown’s most valuable and underappreciated assets.

A Structural Gap: Event and Meeting Space

If the airport is downtown’s strongest asset, meeting and event capacity is probably its clearest gap. Sarasota has no convention center and comparatively little large-format special-event space — a persistent constraint on the kind of conferences, conventions, and group business that fill hotel rooms midweek and in the shoulder seasons, exactly when leisure demand is softest. This is the segment Visit Sarasota County works hardest to recruit, and the one most limited by the absence of suitable rooms.

And that gap recently widened. The Hyatt Regency on Boulevard of the Arts, which closed in May 2025 has now been demolished, housed downtown’s largest hotel ballroom — roughly **10,000 square feet**, seating about 750, within some 20,000 square feet of combined flexible meeting space. Its replacement within Kolter’s 1000 Boulevard of the Arts redevelopment, the Hyatt Centric Harborside, is slated to open with **just over 7,000 square feet** of event space, including a grand ballroom, flexible meeting rooms, and pre-function areas. The new venue will be modern and waterfront, which is a real upgrade in quality — but it is a net reduction in capacity at downtown’s flagship hotel site, leaving the largest single ballroom downtown smaller than the one it replaces.

DSCA flags this not as a criticism of the redevelopment, which delivers needed new rooms, residences, and a refreshed waterfront, but because the cumulative effect deserves city leadership’s attention. A destination that wants to convert visitors into residents and businesses — the “front porch” logic above — has an interest in being able to host the meetings, small to medium size conferences, and signature events where those first impressions are often made. Where larger gatherings will land as downtown grows, and whether the market or a public-private effort should address the mid-size-venue gap, is a question worth putting on the table early rather than discovering after the fact.

Sports Tourism: Growing, and a Season-Smoother

Sports tourism is one of the fastest-growing and most strategically useful parts of the visitor economy, and Sarasota County has invested heavily in it. It matters for two reasons that connect to the points above: it tends to fill rooms in the shoulder and off-season, smoothing the seasonal curve, and it spans men’s, women’s, and — increasingly — youth competition, which brings traveling families who stay multiple nights and spend across restaurants, retail, and attractions. Visit Sarasota County’s FY2026 budget dedicates roughly $1.2 million specifically to recruiting sports competitions, a sign of how central the county considers this segment.

The county's sports assets are substantial:

- **Nathan Benderson Park.** A county-owned, world-class venue with the only FISA Class A 2,000-meter sprint rowing course in North America, hosting national and international regattas. Marquee events such as the USRowing Youth National Championships draw on the order of 4,000 athletes plus coaches and spectators and generate $5 million-plus in regional economic impact each.
- **IMG Academy.** Just north in Bradenton, this 500-acre campus is the world's leading multi-sport training and academic facility and an increasingly important draw — it attracts on the order of 200,000 training athletes, event participants, coaches, and spectators from around the world each year, with its own on-campus hotel.
- **A planned indoor sports complex.** A roughly $32–$40 million indoor facility is advancing at Benderson Park to address a long-acknowledged gap — the lack of indoor space to host youth and amateur tournaments year-round — which would further extend the season-smoothing benefit.
- **Orioles spring training.** Ed Smith Stadium and year-round Orioles events generate tens of millions in local economic impact and anchor a spring season that overlaps the high winter season but extends activity on either side of it.

There is a catch for downtown, though. Most of this activity occurs outside the city — east, north, and south of it. Benderson Park is east, along I-75 near University Parkway; IMG Academy is north in Bradenton; and other facilities and fields are scattered around the county. Many of the families who follow these events are price-sensitive, and downtown's hotels carry higher room rates than the midscale and budget properties clustered near those venues — around Lakewood Ranch, University Town Center, the I-75 corridor, and Bradenton. So tournament visitors tend to stay close to where they compete, not downtown. Downtown captures a smaller share of sports-tourism room nights than its restaurants and attractions might suggest — it gains more from daytime dining than overnight stays. This is a dynamic to understand rather than a problem to solve, but a growing downtown room base at varied price points, with good connectivity to those venues, is what would let downtown share more fully over time.

The International Segment — High Value, Currently in Flux

International visitors are a minority of total visitation — historically 6–7% — but a high-value one, concentrated in the cultural, dining, and shopping experiences downtown offers. Canada is the largest international source market, followed by the United Kingdom and Germany / Central Europe. Within the broader flux above, overseas markets such as Central Europe were up in FY2025 even as Canada softened (Florida recorded a 14.7% drop in Canadian visitors in 2025). The point holds regardless of the exact figures: a meaningful slice of downtown's cultural-tourism audience is international and sensitive to exchange rates, airline capacity, and border policy — all outside local control.

Four numbers to remember

Sarasota County hosts roughly **2.7 million** visitors a year — nearly six times its resident population — generating about **$3.6 billion** in economic impact. They reach the region through an airport four miles north that just set a record at **4.5 million** passengers across **68**

nonstop destinations — and many are not just spending, but auditioning Sarasota as a future home.

Why This Matters for Downtown and the City

Tourism is governed at the county level but experienced at the street level. The visitor economy intersects with several themes raised elsewhere in this briefing:

- **Hotels and the pipeline.** New lodging — the planned Hyatt Centric on Boulevard of the Arts and the hotel component of the Quay and Tempo Hotel on Fruitville — expands the downtown bed-tax base while adding to downtown's work force and road space demand.
- **Parking and connectivity.** Visitors, cultural patrons, and hotel guests share the same parking and circulation demand discussed with the Quay, The Bay Park, and a possible performing arts center — demand that peaks seasonally, when resident demand is also highest. Arrival experience starts at the airport and ends at the parking space.
- **Event and meeting capacity.** Downtown has no convention center and limited large-format event space, and the Hyatt redevelopment trims the flagship hotel ballroom from roughly 10,000 to about 7,000 square feet — a constraint on the group and conference business that fills rooms in the off-season and showcases Sarasota to prospective residents and employers.
- **Seasonality and sports.** Smoothing the seasonal demand curve is a central objective of the visitor economy, and sports tourism — men's, women's, and youth — is one of its best tools. But the venues sit outside the city (Benderson Park east, IMG Academy north, others around the county) and draw price-sensitive families to lower-rate hotels nearby, so downtown today shares more in the daytime spending than the room nights.
- **The conversion funnel.** Most importantly, the visitor experience is the front end of resident and business recruitment. Visitor spending sustains the restaurants, galleries, and venues that make downtown attractive — the same "test drive" that shapes who chooses to move here, invest here, or give here tomorrow.

DSCA's view is straightforward. A healthy visitor economy supports jobs, smooths seasonality, funds amenities residents value, and serves as the recruiting front porch for the residents and businesses still arriving. At the same time, downtown is now a real residential neighborhood, and the city's task is to manage the interface — parking, noise, special events and homeless services— so it works for visitors and residents alike.

The Demographic Aha: Why Sarasota Is Different

The preceding sections describe what downtown is and where it is heading. This section steps back to explain why the demographic context makes all of it more consequential than it might first appear.

This is the point in the briefing where the data should cause a pause. Sarasota County is not merely an older community or a retirement destination. It is one of the most extreme demographic environments of any county in the continental United States — and the City of Sarasota, while younger than the county, operates entirely within that reality.

Three numbers to remember

Sarasota County: **2.28** deaths per birth (BEBR official, 2020–2025). Florida: roughly flat natural change, with deaths and births near balance. Japan — a declared national demographic emergency: 2.34 deaths per birth.

The comparison to Japan is not rhetorical. It reflects a structural condition that no policy can quickly change: when 38% of the County of Sarasota population is 65 or older and only 14% are under 18, deaths will always substantially outnumber births. The entire net population gain of 53,634 between 2020 and 2025 came from in-migration — 72,493 net migrants offset the natural loss of 18,859 from deaths exceeding births.

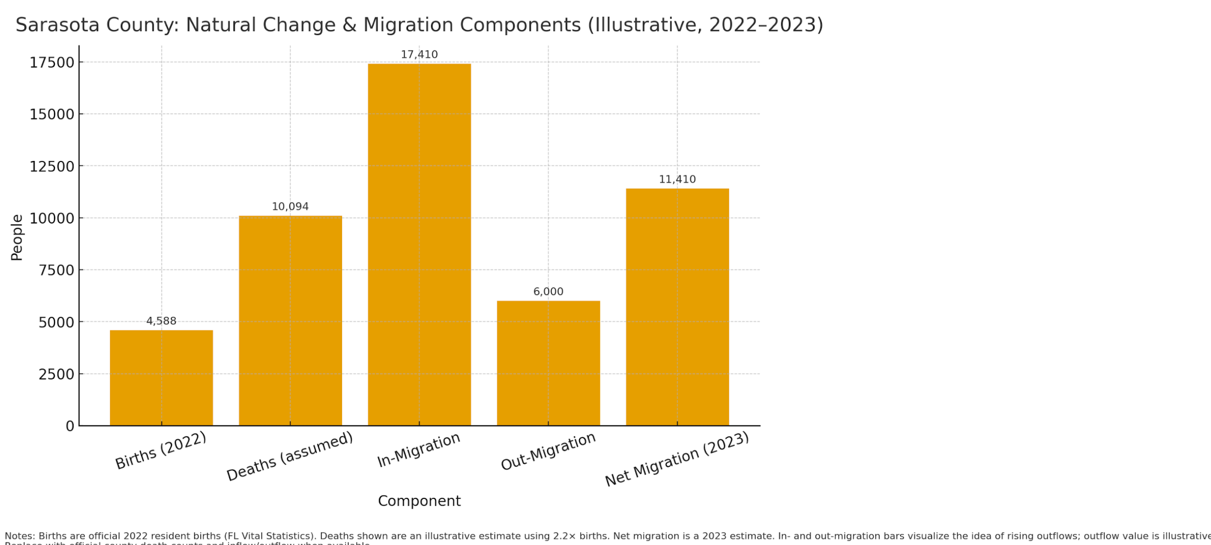


Chart: Sarasota County Natural Change and Migration Components (illustrative, 2022–2023). Births are official FL Vital Statistics. Deaths estimated at 2.2× births. Net migration is a 2023 estimate. Source: DSCA demographic analysis, May 2026.

The Global Context: Natural Change, Fertility, and Immigration

Geography	TFR (2023–24)	Deaths/birth	Natural change/yr	Median age	% 65+
United States	1.60	~0.85×	Near zero	38.7	18.0%
Florida	~1.60	~1.0×	Flat / neg.	42.0	~22.0%
Germany	1.35	~1.49×	−320K/yr	45.1	21.8%
Japan	**1.15**	**2.34×**	−900K/yr	49.9	29.1%
Sarasota County	**~0.70***	**2.28×***	−18,859 (5-yr)	57.4	37–38%

**Sarasota County TFR is a demographic estimate; CDC reports at state level only. Deaths-to-births ratio from BEBR Jan 2026 (14,706 births, 33,565 deaths, 2020–2025). Sources: BEBR; CDC NCHS 2025; Destatis Germany July 2025; Japan Ministry of Health 2024.*

Germany has recorded more deaths than births every year since 1972 — 2024 was the 53rd consecutive year its population would have declined without immigration. Germany's TFR of 1.35 and deaths-to-births ratio of approximately 1.49 has required sustained mass immigration to offset: net immigration of approximately 430,000 in 2024, approximately 663,000 in 2023. Germany is the world's second-largest immigration destination, yet its working-age population is still shrinking.

Japan is turning to immigration as a last resort: by end-2024 there were 3,768,977 foreign residents — a record high, up 10.5% in one year — and 2.3 million foreign workers. Yet this cannot offset a natural population loss of nearly 900,000 people per year. Japan's experience illustrates the core lesson for Sarasota: once a demographic deficit reaches this scale, no level of immigration that a society is realistically willing to accept can fully compensate for it.

The United States as a whole reached a record-low TFR of 1.599 in 2024. Deaths are projected to exceed births nationally around 2030–2031. Sarasota County is already twenty or more years ahead of the national trend — operating as a demographic preview of what the rest of the country faces in the 2040s.

Sarasota's Economic Base: Arts, Culture, and Beaches as Traded Sector

Sarasota does not have a traditional manufacturing or technology base. Its economic engine is the continuous attraction of moderate to affluent retirees and second-home households, sustained by a cultural identity that distinguishes the city from other Florida coastal markets. Sarasota competes not with Bradenton or North Port for residents, but with Santa Fe, Asheville, Charleston, Naples, and Palm Beach — markets where a distinctive cultural identity is the primary differentiator.

This frames why the proposed Sarasota Performing Arts Center (SPAC) has become such a consequential community question. The strategic logic for investment in cultural infrastructure is part of what distinguishes Sarasota from competing markets — but the SPAC decision is also a roughly $300 million one, taken at a time of property tax uncertainty and broader budget pressures. Different reasonable people weigh that trade-off differently. DSCA's position is not advocacy for a particular outcome but a focus on the question itself: whatever path is chosen, it should make economic sense, fit the city's strategic direction, and protect the value proposition on which downtown's residential market — and the city's migration pipeline — depends.

The economic point is straightforward: unlike larger metropolitan areas with major corporate, research, manufacturing, or technology anchors, Sarasota's economic strength depends heavily on the continued attractiveness of place. Its flywheel runs on not only on its beaches but it cultural distinctiveness attracting residents, who drive property values, support philanthropy, sustain cultural institutions, and reinforce the city's identity. It is self-reinforcing — but it is also more dependent on continued preference and reputation.

The Workforce Paradox.

Sarasota's economic model creates a structural tension: the industries that sustain the local economy — hospitality, healthcare, arts administration, restaurants, retail — require a large, affordable working-age workforce, but the dominant demographic and real estate dynamics actively price that workforce out. A Sarasota Memorial nurse, a Florida Studio Theatre production manager, or a Siesta Key hotel employee earning a median wage cannot afford to live in the county they serve. The result is a growing reverse-commute pattern and fragility in service-sector staffing that directly affects the experience the city's economy depends on.

Wealth Migration

Between 2021 and 2022, Sarasota County gained a net $2.6 billion in Adjusted Gross Income from in-migrating households — ranking third among all Florida counties, behind only Palm Beach (+$4.9B) and Collier/Naples (+$4.4B). Northern Trust manages $7.25 billion in local assets as of December 2024, up 7.7% in one year. The Florida Philanthropic Network estimates $55 billion in intergenerational wealth transfer across Sarasota, Manatee, Charlotte, and DeSoto counties over the next decade.

The ultra-luxury real estate market (properties over $5M) rose 90% year-over-year in Q2 2024. A bayfront estate on Longboat Key sold for a record $30.3 million cash in August 2025. The community is not merely growing in population — it is growing in wealth concentration.

DSCA's Perspective

The preceding sections present facts and data. The following presents DSCA's observations, priorities, and an invitation to continue the conversation.

Sarasota is one of the most distinctive mid-sized cities in the United States. Downtown is where that dynamic is most visible. DSCA's role is specific: we track data, engage in planning processes, advocate on quality-of-life issues, and represent the perspective of people who actually live downtown.

County Growth Is Moving South and East — But Downtown Sarasota Remains the Civic and Cultural Center

Sarasota County's growth story is increasingly a two-part story.

The City of Sarasota remains the county's historic, civic, cultural, and urban center. It contains many of the county's signature assets: downtown, the bayfront, major cultural institutions, City Hall, many of the region's higher-density residential buildings, and the emerging Bay Park district.

At the same time, the city is not the county's main population growth engine. As the data earlier in this briefing shows, most of the county's recent growth has occurred outside the city, particularly in South County. North Port — now the largest city in Sarasota County by a substantial margin — has roughly 100 square miles of land area, compared with about 15 square miles for the City of Sarasota. On a land-area basis, North Port is nearly seven times larger. Wellen Park is the most visible example of this shift: a large-scale, master-planned growth area in the southern portion of the county that is reshaping where residents, retail demand, transportation needs, public safety attention, and political weight are flowing.

For the City of Sarasota, this does not reduce the importance of downtown. It changes the context. Downtown will need to continue functioning as the county's primary urban, cultural, civic, and visitor center even as more of the county's population growth occurs elsewhere.

That creates both opportunity and pressure. A growing county can support downtown restaurants, arts venues, events, jobs, medical services, cultural institutions, and public spaces. But it also means the city must be clear about its role. Sarasota cannot compete with North Port, Lakewood Ranch, or planned communities es such as Wellen Park on land supply. Its strength is the quality, walkability, cultural depth, public realm, and economic value of its urban core.

Area	Role in the county growth pattern
City of Sarasota	Historic, civic, cultural, urban, bayfront and downtown center
North Port	Largest municipality by population; major land capacity for continued growth
Wellen Park Master Planned Community example	Major master-planned growth area helping shift population south
Venice / South County	Growing residential, retail, health care, and service center

Downtown Sarasota	Countywide identity center despite being geographically small

Key Takeaway

Sarasota County's population growth is moving south and east, especially toward North Port and Wellen Park. The City of Sarasota's challenge is different. It is not to absorb growth through land expansion, but to manage a compact, high-value urban core that serves residents, visitors, businesses, and the broader county.

The implication for city policy is that decisions on mobility, public space, arts and culture, infrastructure, and development quality should be viewed in light of this regional shift. South County may be where much of the population growth occurs, but downtown Sarasota remains one of the main reasons people choose the region in the first place.

What We Hope You Take Away

1. Sarasota's demographic reality is one of the city's biggest strategic issues. The pipeline of in-migrants is narrowing. What makes the city attractive cannot be taken for granted.

2. Arts, culture, parks, retail, and downtown amenities are economic drivers, not extras. Ringling College of Arts & Design anchors a creative economy unusual for a city of this size.

3. Downtown is where Sarasota's future-facing pressures and opportunities come together. One-quarter of the city's population in one-eighth of its land.

4. Quality-of-life issues downtown are city-management issues, not side issues.

5. Major development is continuing, but the infrastructure model needs review. SRQ's growth amplifies both opportunity and demand.

6. What do you expect from resident associations? How important is resident feedback in your decision making?

7. Sarasota's fiscal future depends on how well the city manages its strongest assets.

8. DSCA continues to be a constructive, data-informed partner — and a clear residential voice.

Our Value Offer

DSCA represents approximately 40 member associations and more than 14,000 seasonal residents. We maintain a 145-building residential database, track development activity monthly, and participate consistently in city meetings. DSCA will not agree with the city on every issue. Where we disagree, we will try to say so directly with our reasoning attached. Where we can help, we will offer help. Our goal is to be useful.

Suggested First Conversation Agenda

1. How the city manager sees downtown's role in Sarasota's future — and what surprised you in this briefing.

2. Quality of life downtown: noise, construction impact, parking, code enforcement — the lived experience.

3. The Downtown Master Plan: process, timeline, and how DSCA's residential data can be useful?

4. Development pipeline: how the city manages 2,921 units in the pipeline on constrained infill sites.

5. The Quay, The Bay, and west-of-41: the convergence of public investment and private development.

6. What DSCA can do better — and what the city needs from its residential partners.

Looking Forward

This briefing is a starting point, not a final word. Sarasota is changing — demographically, physically, economically — and the decisions made in the next few years will shape the city for decades.

DSCA looks forward to working with you.

Downtown Sarasota Condominium Association

www.downtownsarasotacondoassoc.com

Appendix

Source material, detailed data, and supporting documentation for the analysis presented in the main Briefing Book.

Each appendix supports specific claims, data points, or references in the body of the briefing. The full briefing can be read without the appendix; the appendix is available for the reader who wants to verify, explore, or cite the underlying material.

CONTENTS

Page numbers refer to this assembled June 2026, rev 1 document. Items are included as supporting materials and may be reviewed independently as topics arise.

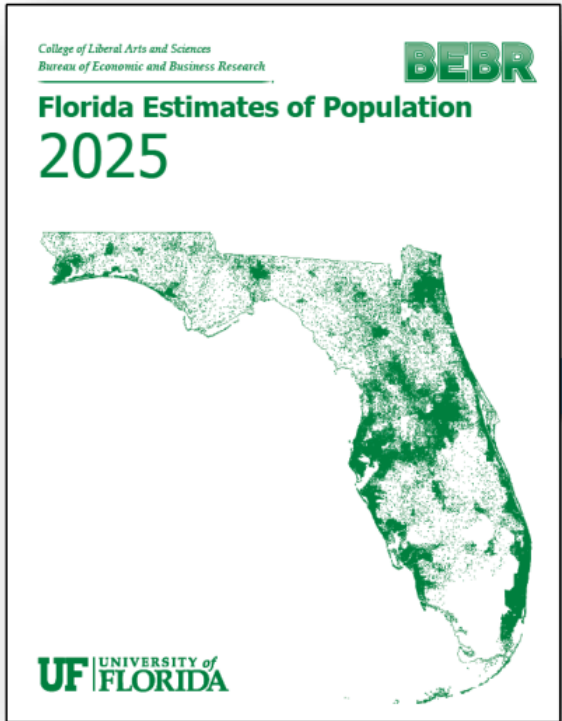
APPENDIX A

BEBR AND DEMOGRAPHIC REFERENCE MATERIAL

BEBR is the University of Florida's Bureau of Economic and Business Research.
The selected BEBR materials provide context for population estimates, projected growth, migration, aging trends, and county-level demographic change.

Official Population Estimates

- Annual contract with Florida Legislature
- Official numbers for planning, budgeting, revenue sharing, etc.
- State, all 67 counties & unincorporated portions of counties
- 411 cities, towns & villages



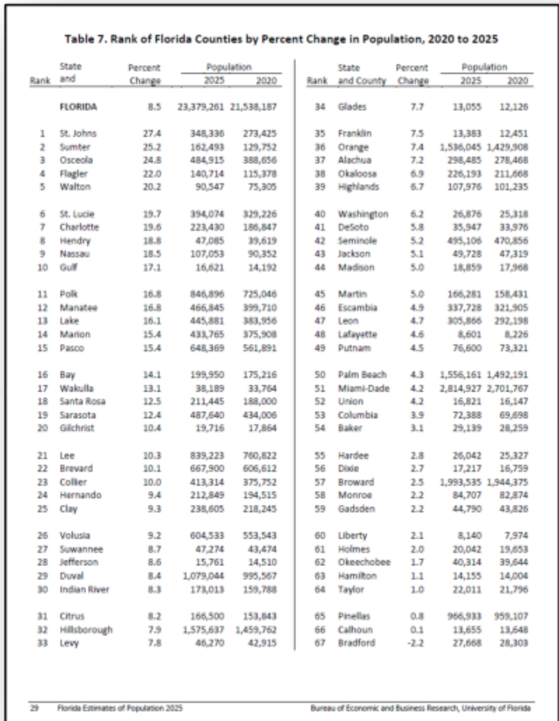
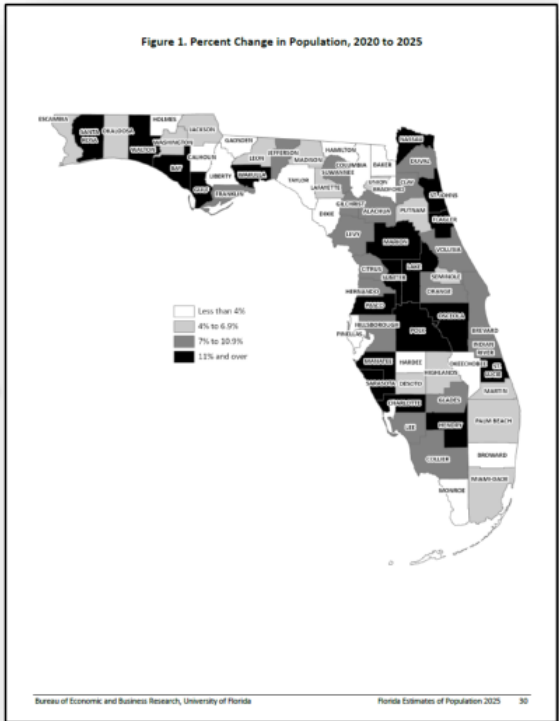


Table 7. Rank of Florida Counties by Percent Change in Population, 2020 to 2025

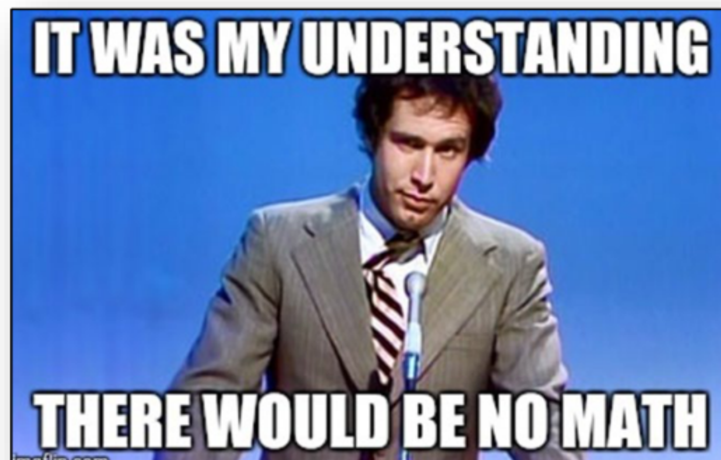
Rank	State and County	Percent Change	Population 2025	Population 2020
	FLORIDA	8.5	23,379,261	21,538,187
1	St. Johns	27.4	348,336	273,425
2	Sumter	25.2	162,493	129,752
3	Osceola	24.8	484,915	388,656
4	Flagler	22.0	140,714	115,378
5	Walton	20.2	90,547	75,305
6	St. Lucie	19.7	394,074	329,226
7	Charlotte	19.6	223,430	186,847
8	Hendry	18.8	47,085	39,619
9	Nassau	18.5	107,053	90,352
10	Gulf	17.1	16,621	14,192
11	Polk	16.8	846,896	725,046
12	Manatee	16.8	466,845	399,710
13	Lake	16.1	445,881	383,956
14	Marion	15.4	433,765	375,908
15	Pasco	15.4	648,369	561,891
16	Bay	14.1	199,950	175,216
17	Wakulla	13.1	38,189	33,764
18	Santa Rosa	12.5	211,445	188,000
19	Sarasota	12.4	487,640	434,006
20	Gilchrist	10.4	19,716	17,864
21	Lee	10.3	839,223	760,822
22	Brevard	10.1	667,900	606,612
23	Collier	10.0	413,314	375,752
24	Hernando	9.4	212,849	194,515
25	Clay	9.3	238,605	218,245
26	Volusia	9.2	604,533	553,543
27	Suwannee	8.7	47,274	43,474
28	Jefferson	8.6	15,761	14,510
29	Duval	8.4	1,079,044	995,567
30	Indian River	8.3	173,013	159,788
31	Citrus	8.2	166,500	153,843
32	Hillsborough	7.9	1,575,637	1,459,762
33	Levy	7.8	46,270	42,915
34	Glades	7.7	13,055	12,126
35	Franklin	7.5	13,383	12,451
36	Orange	7.4	1,536,045	1,429,908
37	Alachua	7.2	298,485	278,468
38	Okaloosa	6.9	226,193	211,668
39	Highlands	6.7	107,976	101,235
40	Washington	6.2	26,876	25,318
41	DeSoto	5.8	35,947	33,976
42	Seminole	5.2	495,106	470,856
43	Jackson	5.1	49,728	47,319
44	Madison	5.0	18,859	17,968
45	Martin	5.0	166,281	158,431
46	Escambia	4.9	337,728	321,905
47	Leon	4.7	305,866	292,198
48	Lafayette	4.6	8,601	8,226
49	Putnam	4.5	76,600	73,321
50	Palm Beach	4.3	1,556,161	1,492,191
51	Miami-Dade	4.2	2,814,927	2,701,767
52	Union	4.2	16,821	16,147
53	Columbia	3.9	72,388	69,698
54	Baker	3.1	29,139	28,259
55	Hardee	2.8	26,042	25,327
56	Dixie	2.7	17,217	16,759
57	Broward	2.5	1,993,535	1,944,375
58	Monroe	2.2	84,707	82,874
59	Gadsden	2.2	44,790	43,826
60	Liberty	2.1	8,140	7,974
61	Holmes	2.0	20,042	19,653
62	Okeechobee	1.7	40,314	39,644
63	Hamilton	1.1	14,155	14,004
64	Taylor	1.0	22,011	21,796
65	Pinellas	0.8	966,933	959,107
66	Calhoun	0.1	13,655	13,648
67	Bradford	-2.2	27,668	28,303

29 Florida Estimates of Population 2025 Bureau of Economic and Business Research, University of Florida



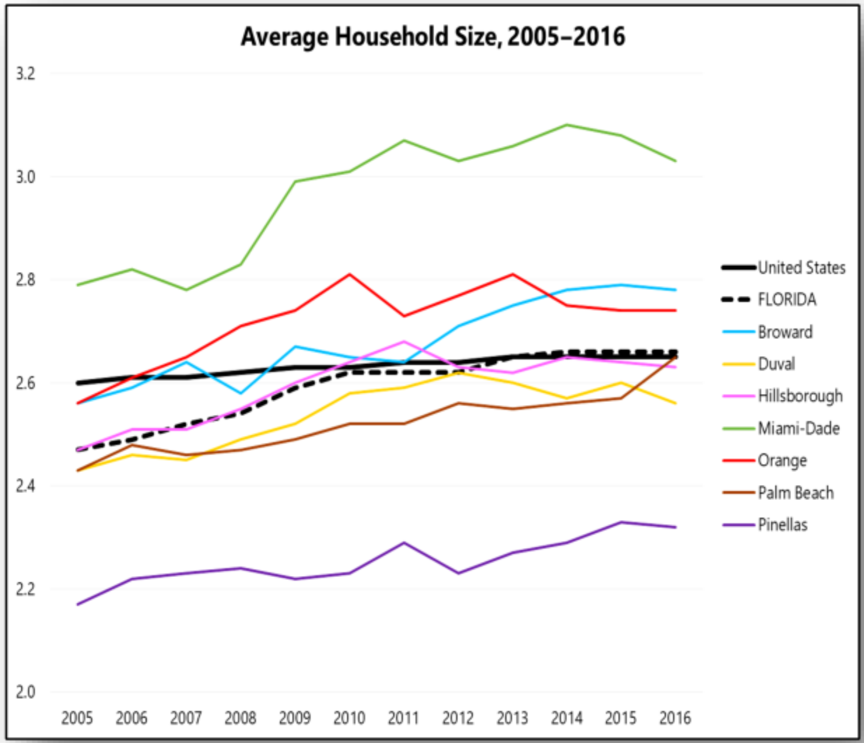
BEBR Methods for Estimating Population

- Permanent residents only
- Housing unit method
  - Changes in population based on changes in occupied housing units (households)
  - Most common method for local estimates
  - Can use wide variety of data sources
  - Applied at any level of geography
- P = (HH x PPH) + GQ
  - P = population
  - HH = occupied housing units (households)
  - PPH = average number of persons per household
  - GQ is the group quarters population



Occupancy Rate & Persons Per Household (PPH)

- P = (HH x PPH) + GQ
- Start with 2020 Census values by jurisdiction (most accurate)
- Make adjustments using:
  - Statistically significant trends in American Community Survey (ACS) data (most current)
  - Significant local changes in the mix of single family, multi-family and mobile homes
  - Data showing changes in the proportion of seasonal population



Source: 2005–2016 American Community Survey 1-Year Estimates

Florida's Top Counties by Population Size

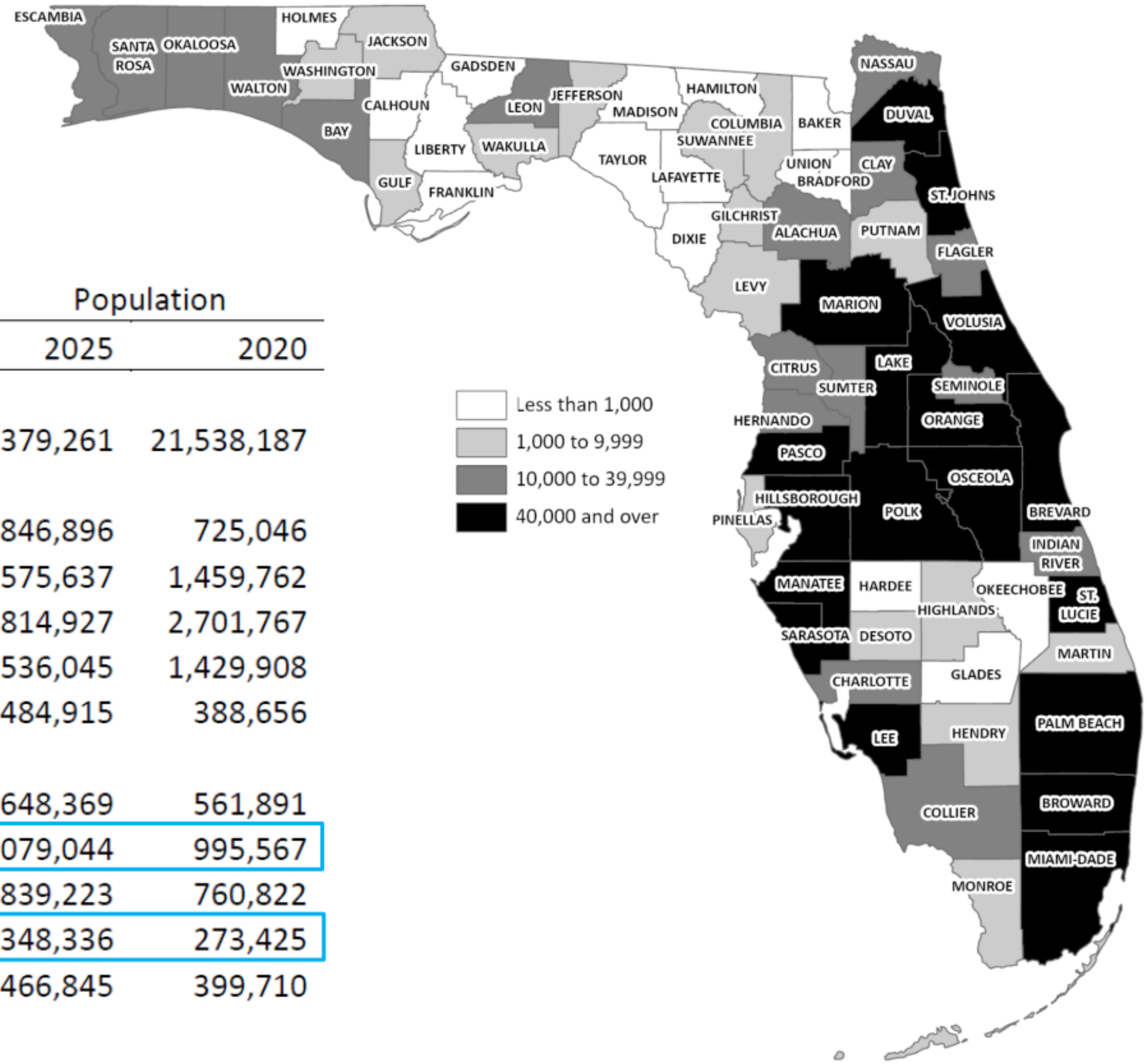
Rank	State and County	Population 2025	Population 2020	Population 2010	Population 2000	Percent of State Population 2025	Percent of State Population 2020	Percent of State Population 2010	Percent of State Population 2000
	FLORIDA	23,379,261	21,538,187	18,801,332	15,982,824	100.00	100.00	100.00	100.00
1	Miami-Dade	2,814,927	2,701,767	2,496,457	2,253,779	12.04	12.54	13.28	14.10
2	Broward	1,993,535	1,944,375	1,748,066	1,623,018	8.53	9.03	9.30	10.15
3	Hillsborough	1,575,637	1,459,762	1,229,226	998,948	6.74	6.78	6.54	6.25
4	Palm Beach	1,556,161	1,492,191	1,320,134	1,131,191	6.66	6.93	7.02	7.08
5	Orange	1,536,045	1,429,908	1,145,956	896,344	6.57	6.64	6.10	5.61
6	Duval	1,079,044	995,567	864,263	778,879	4.62	4.62	4.60	4.87
7	Pinellas	966,933	959,107	916,542	921,495	4.14	4.45	4.87	5.77
8	Polk	846,896	725,046	602,095	483,924	3.62	3.37	3.20	3.03
9	Lee	839,223	760,822	618,754	440,888	3.59	3.53	3.29	2.76
10	Brevard	667,900	606,612	543,376	476,230	2.86	2.82	2.89	2.98
11	Pasco	648,369	561,891	464,697	344,768	2.77	2.61	2.47	2.16
12	Volusia	604,533	553,543	494,593	443,343	2.59	2.57	2.63	2.77
13	Seminole	495,106	470,856	422,718	365,199	2.12	2.19	2.25	2.28
14	Sarasota	487,640	434,006	379,448	325,961	2.09	2.02	2.02	2.04
15	Osceola	484,915	388,656	268,685	172,493	2.07	1.80	1.43	1.08

BEBR BUREAU OF ECONOMIC AND BUSINESS RESEARCH

Source: BEBR, U.S. Census Bureau.

UF UNIVERSITY of FLORIDA

Florida's Top Counties by Numeric Growth, 2020-2025



Rank	State and County	Change	Population 2025	Population 2020
	FLORIDA	1,841,074	23,379,261	21,538,187
1	Polk	121,850	846,896	725,046
2	Hillsborough	115,875	1,575,637	1,459,762
3	Miami-Dade	113,160	2,814,927	2,701,767
4	Orange	106,137	1,536,045	1,429,908
5	Osceola	96,259	484,915	388,656
6	Pasco	86,478	648,369	561,891
7	Duval	83,477	1,079,044	995,567
8	Lee	78,401	839,223	760,822
9	St. Johns	74,911	348,336	273,425
10	Manatee	67,135	466,845	399,710

Source: BEBR, U.S. Census Bureau.

Latest BEBR State Projections (February 2026)

	Estimates	Projections, April 1				
	April 1, 2025	2030	2035	2040	2045	2050
FLORIDA	23,379,261					
Low		23,912,700	24,510,100	24,810,500	24,898,400	24,860,100
Medium		24,909,000	26,074,600	26,967,900	27,664,900	28,250,100
High		25,905,400	27,639,100	29,125,300	30,431,400	31,640,100

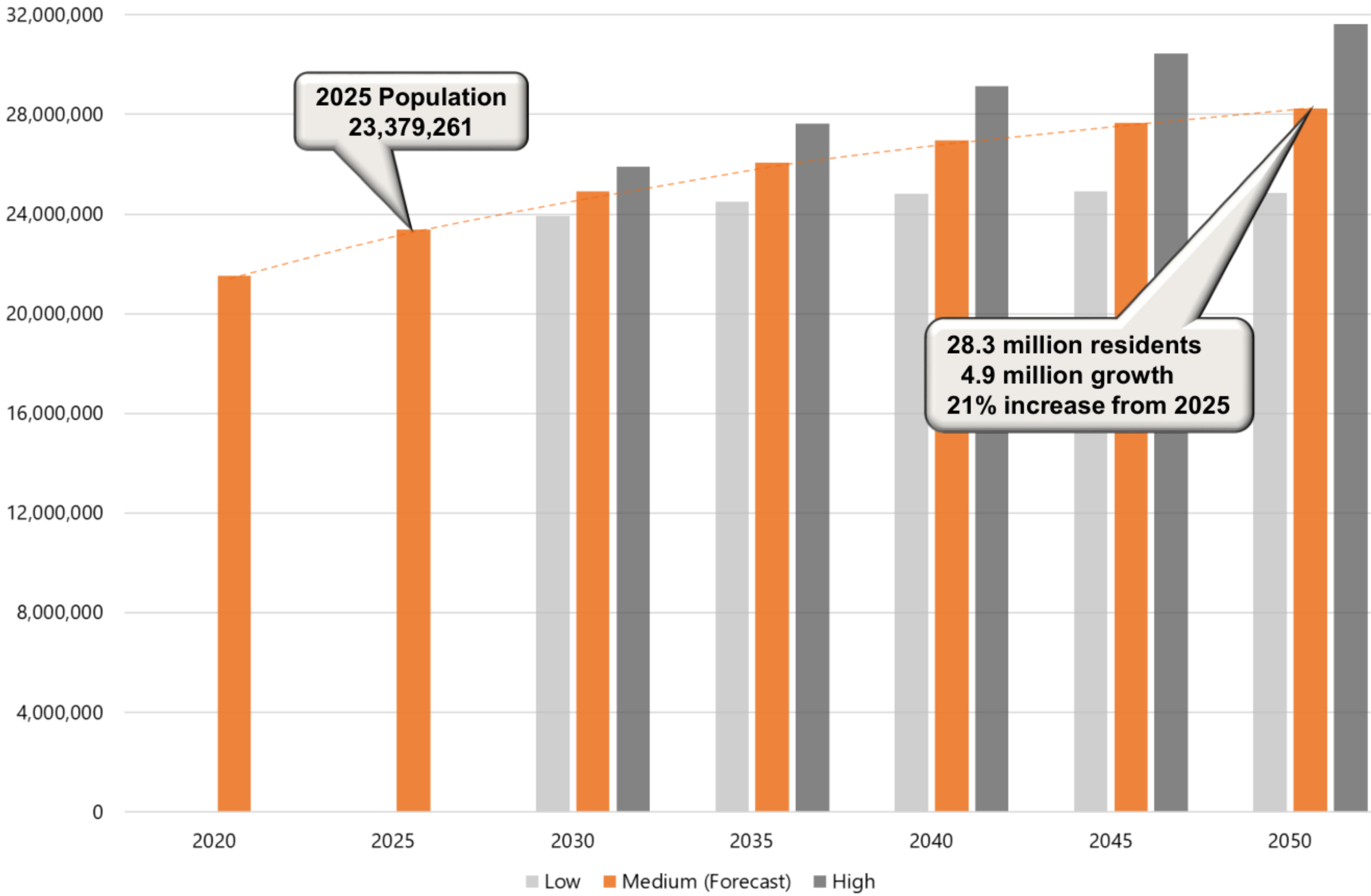
- The Medium series is our forecast, and will generally provide the most accurate forecasts of future population change
- Low and high projections **do not** represent low and high growth scenarios.

BUREAU OF ECONOMIC AND BUSINESS RESEARCH

Source: BEBR, Florida Population Studies, Bulletin 203, February 2026.

UNIVERSITY of FLORIDA

Florida Population Counts and Projections, 2020–2050



BEBR BUREAU OF ECONOMIC AND BUSINESS RESEARCH

Sources: 1) BEBR, Florida Population Studies, Bulletin 203, ruary 2026. 2) U.S. Census Bureau.

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BEBR Projected 2025-2050 County Growth Rankings

Rank	County	Numeric Change
1	ORANGE	363,555
2	HILLSBOROUGH	326,463
3	MIAMI-DADE	325,773
4	POLK	292,004
5	OSCEOLA	269,985
6	LEE	233,977
7	PASCO	218,631
8	PALM BEACH	210,639
9	DUVAL	199,456
10	ST. JOHNS	197,964
11	BROWARD	191,165
12	LAKE	180,119
13	MANATEE	165,255
14	ST. LUCIE	146,326
15	BREVARD	138,800

Rank	County	Percent Change
1	ST. JOHNS	56.8
2	OSCEOLA	55.7
3	SUMTER	53.3
4	WALTON	48.2
5	FLAGLER	41.7
6	LAKE	40.4
7	NASSAU	37.7
8	ST. LUCIE	37.1
9	CHARLOTTE	37.0
10	MANATEE	35.4
11	POLK	34.5
12	PASCO	33.7
13	SANTA ROSA	30.7
14	MARION	30.5
15	WAKULLA	28.6

BEBR BUREAU OF ECONOMIC AND BUSINESS RESEARCH

BEBR, Florida Population Studies, Bulletin 203, February 2026.

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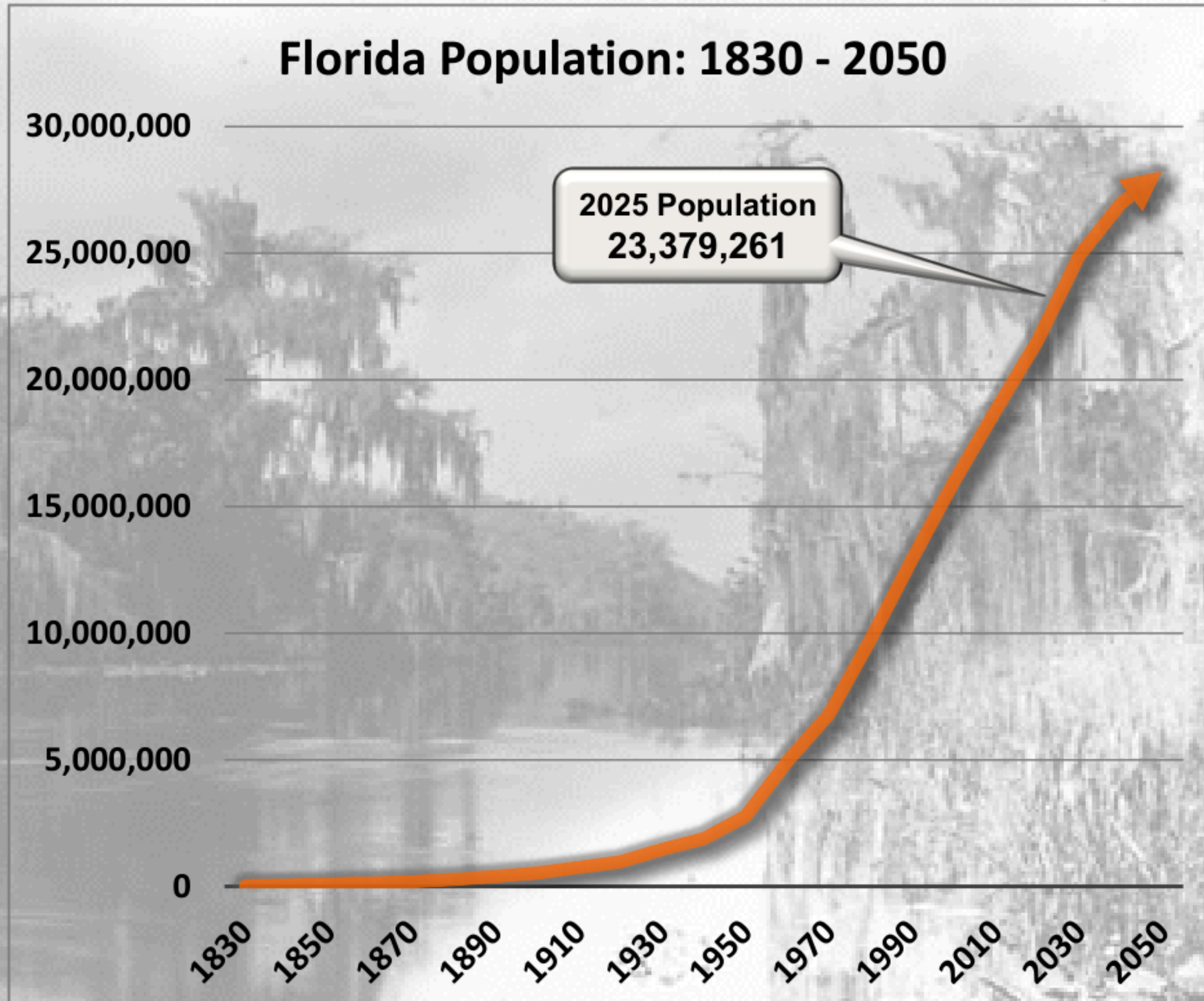
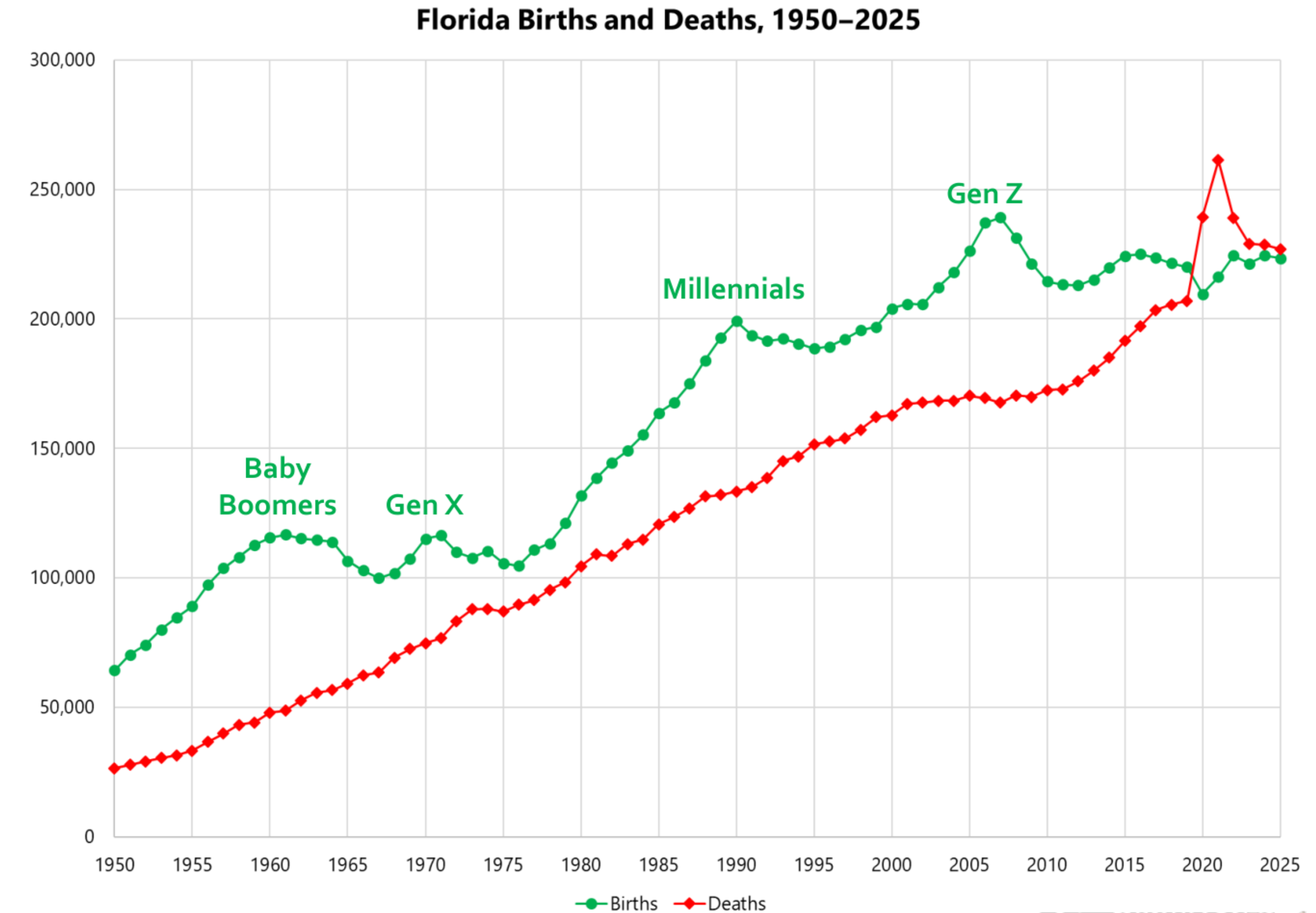
Florida’s Rapid Population Growth

In 1821, Senator John Randolph of Virginia opposed the admission of Florida to the United States, calling Florida “a land of swamps, of quagmires, of frogs and alligators and mosquitoes! A man, sir, would not immigrate into Florida – and no, not from Hell itself.”



Florida's Rapid Population Growth

- Growth has been very strong over the last decade, but indications of slowing
- 2025 Population: **23,379,261**
- 2020-2025:
  368,000/year or **1,000**/day
  (> Orlando each year)
- 2025-2030:
  306,000/year or **838**/day
  (> St. Petersburg each year)



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: Bureau of Vital Statistics, Florida Department of Health.

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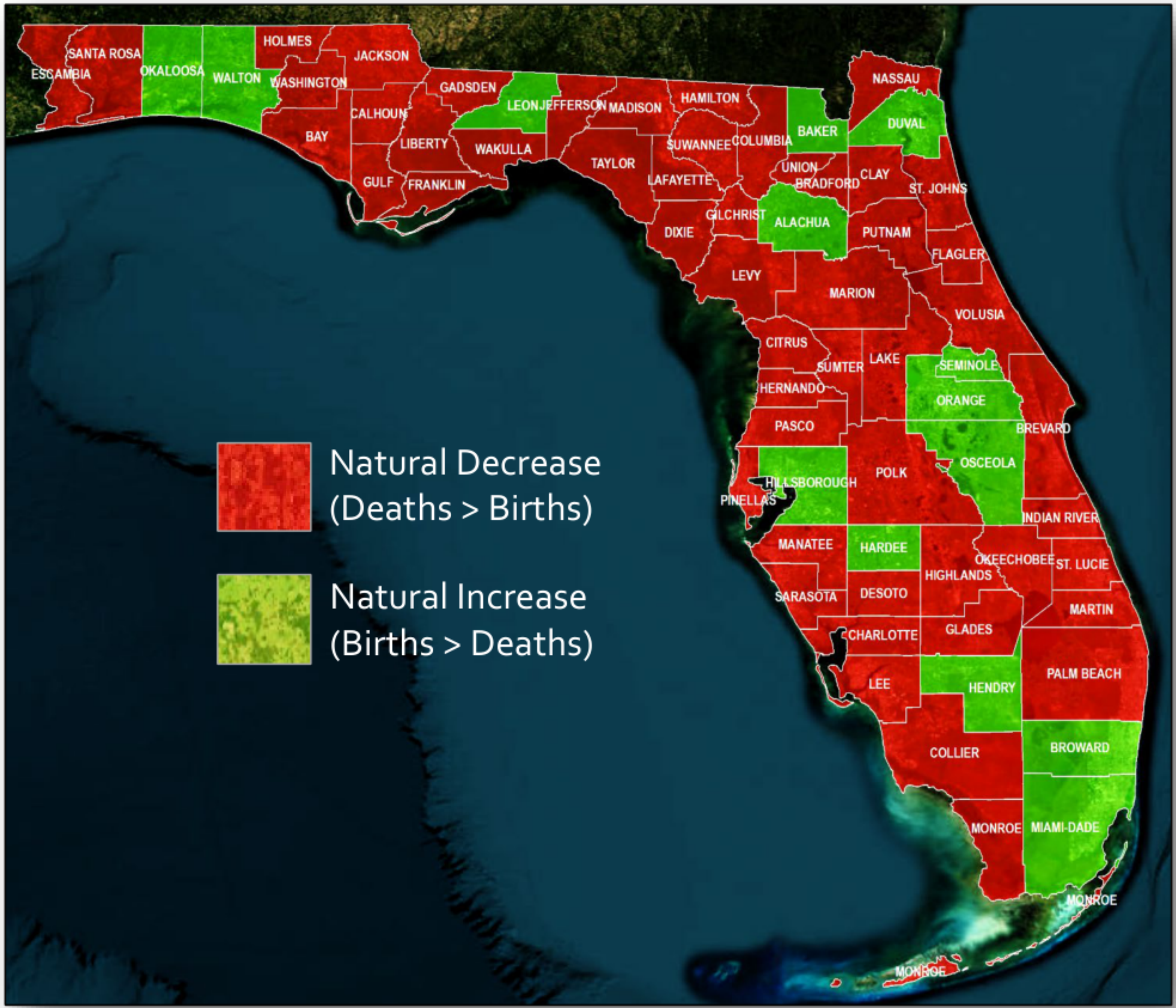
Population Natural Increase and Decrease by County, 2020-2025



BUREAU OF ECONOMIC AND BUSINESS RESEARCH

Sources: 1) Bureau of Vital Statistics, Florida Department of Health. 2) BEBR.

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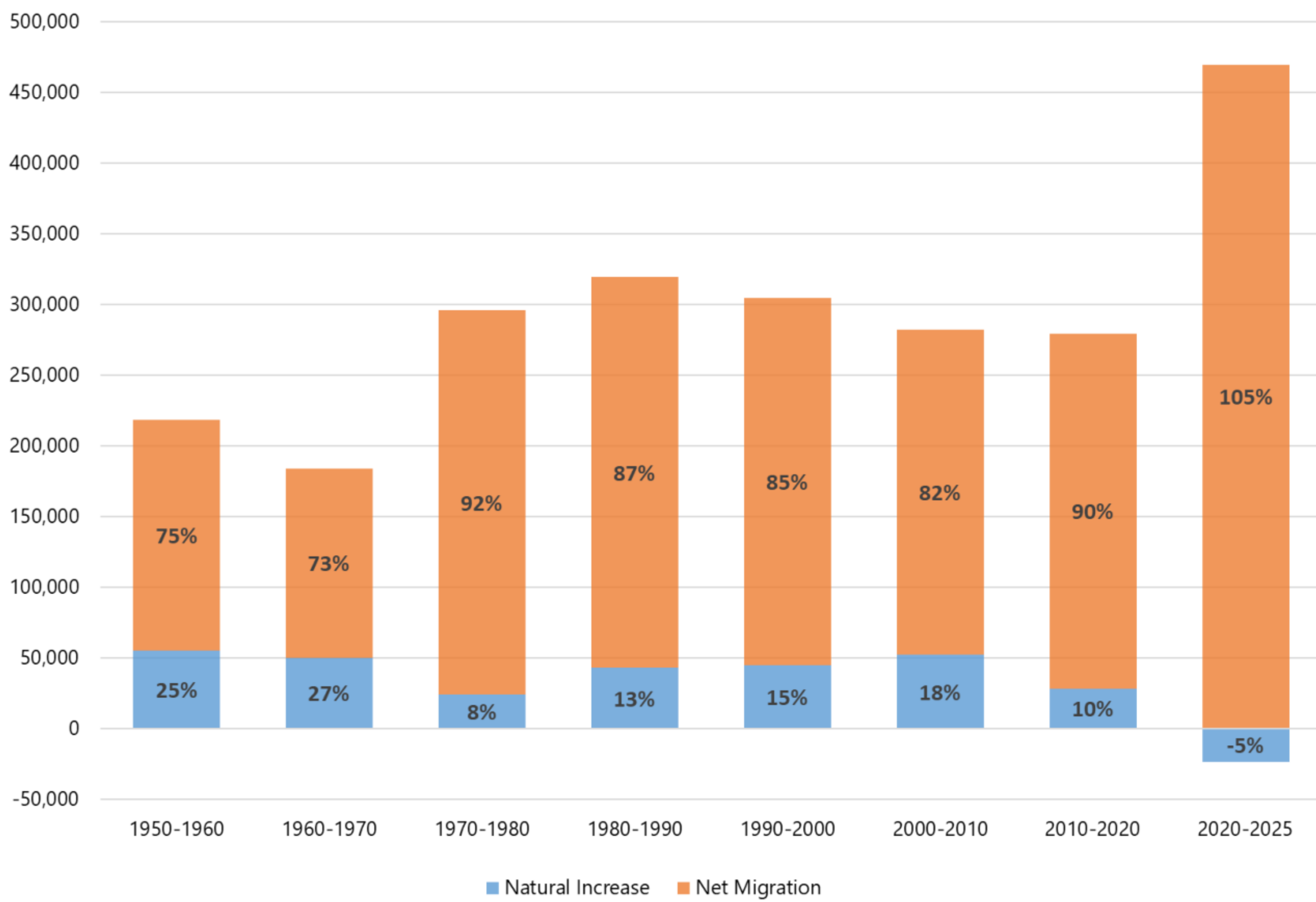
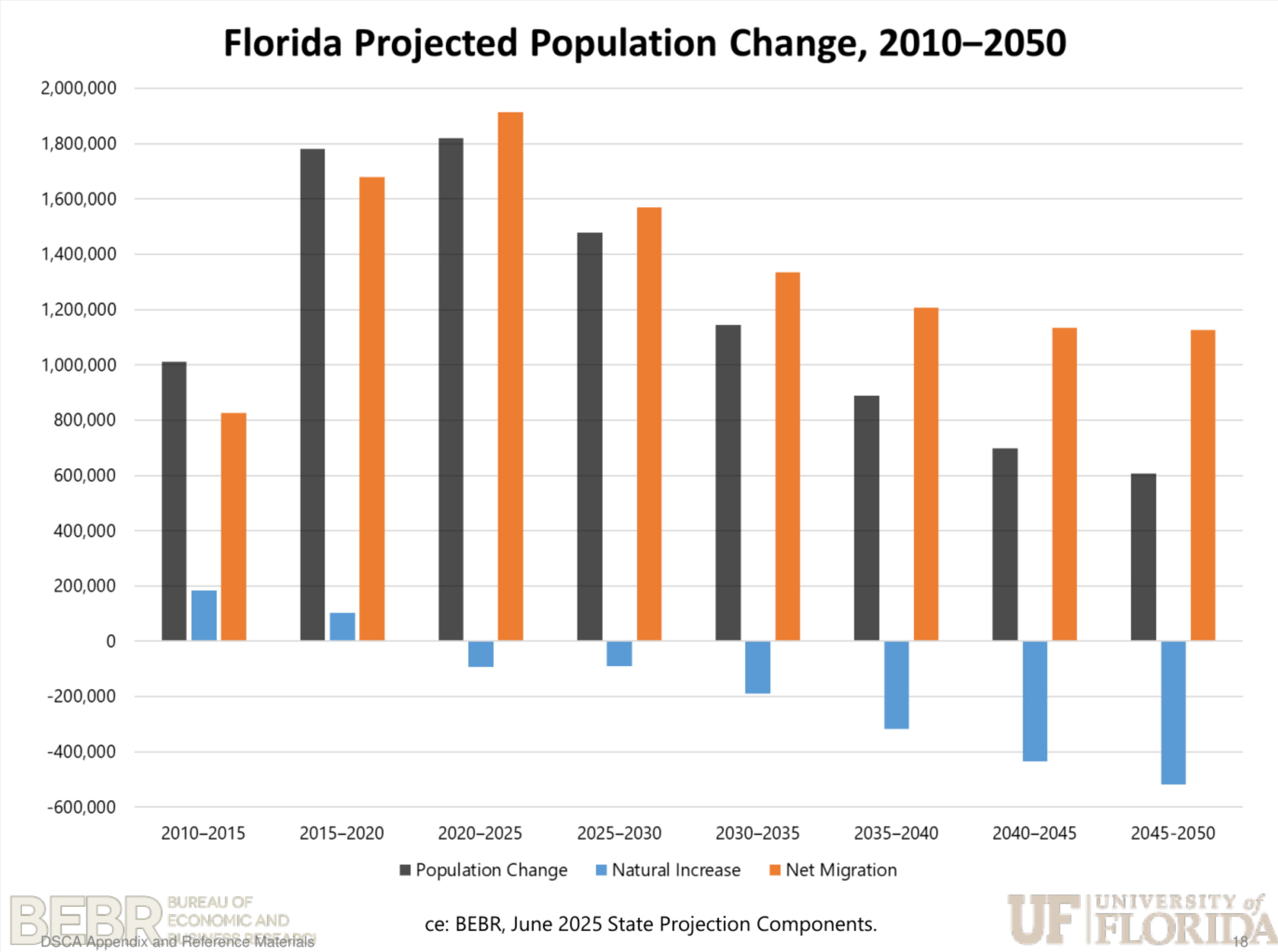
Average Annual Natural Increase and Net Migration in Florida, 1950–2025



Source: BEBR, unpublished data.


Florida Projected Population Change, 2010–2050
2,000,000
1,800,000
1,600,000
1,400,000
1,200,000
1,000,000
800,000
600,000
400,000
200,000
0
-200,000
-400,000
-600,000
2010–2015
2015–2020
2020–2025
2025–2030
2030–2035
2035–2040
2040–2045
2045-2050
Population Change
Natural Increase
Net Migration
BEBR BUREAU OF ECONOMIC AND BUSINESS RESEARCH
ce: BEBR, June 2025 State Projection Components.
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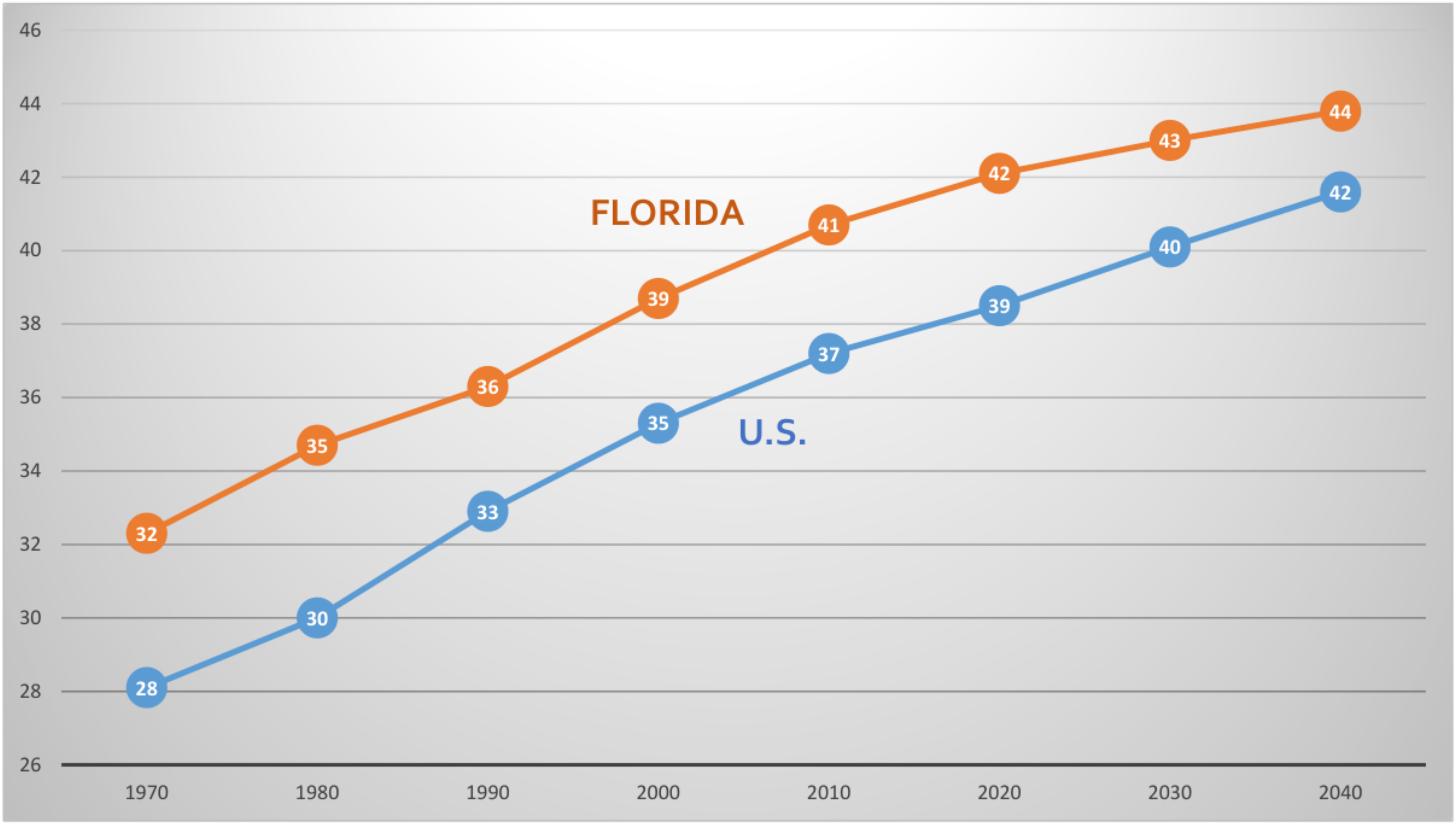
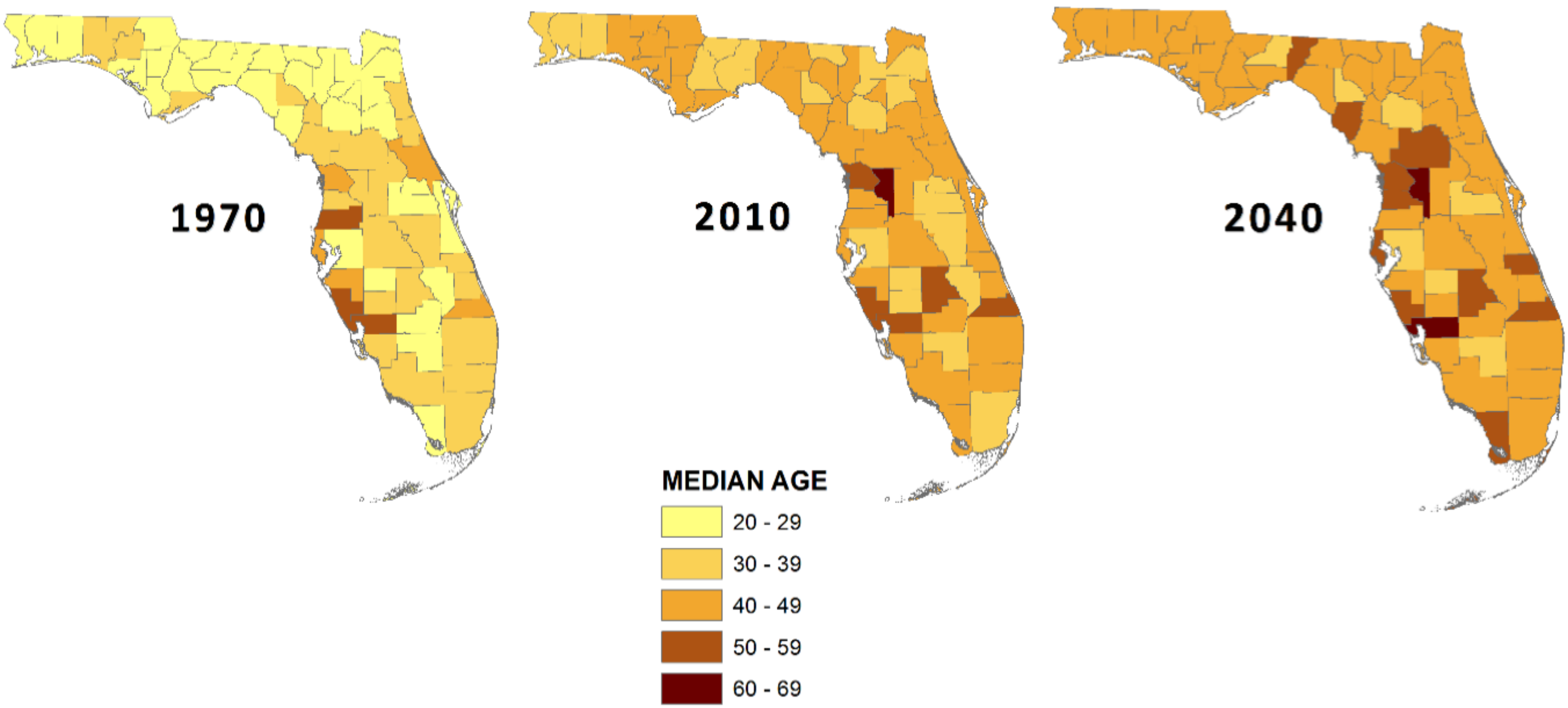
Median Age, Florida and the U.S., 1970–2040



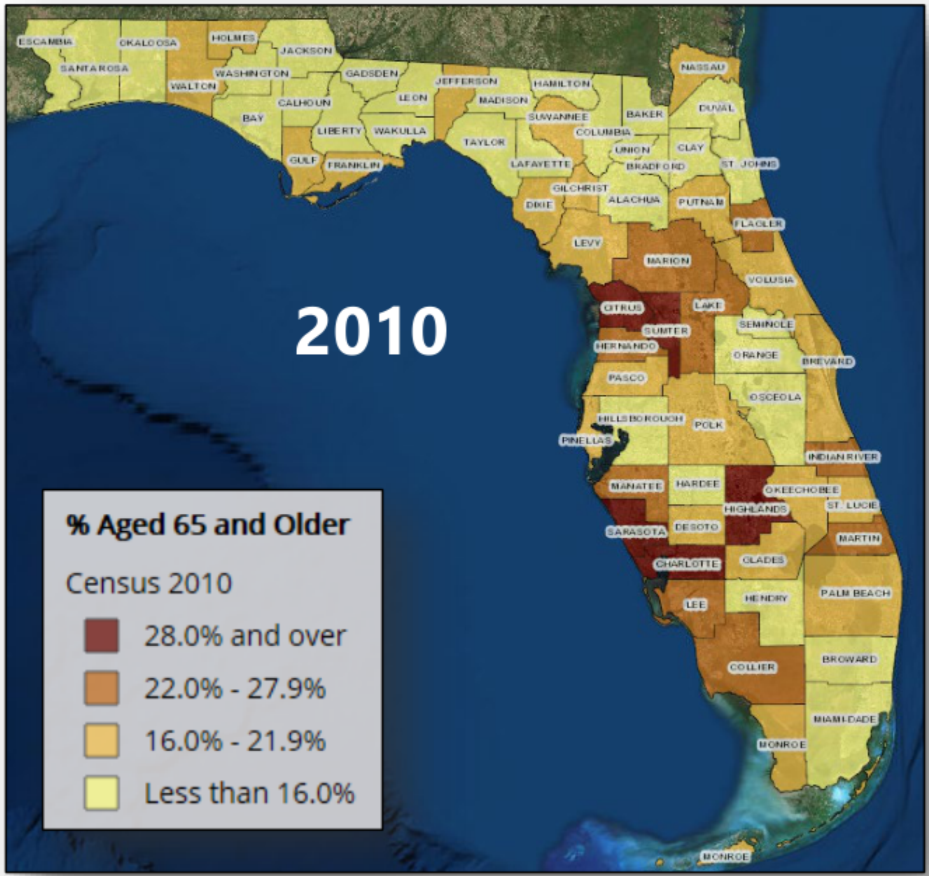
Sources: 1) BEBR Population Projections by Age, Sex, Race, and Hispanic Origin for Florida and Its Counties. 2) U.S. Census Bureau, Decennial Census of Population, 1970 to 2010. 3) U.S. Census Bureau, Projections of the Population by Age and Sex for the United States: 2015 to 2060 (NP2014-T9), December 2014.

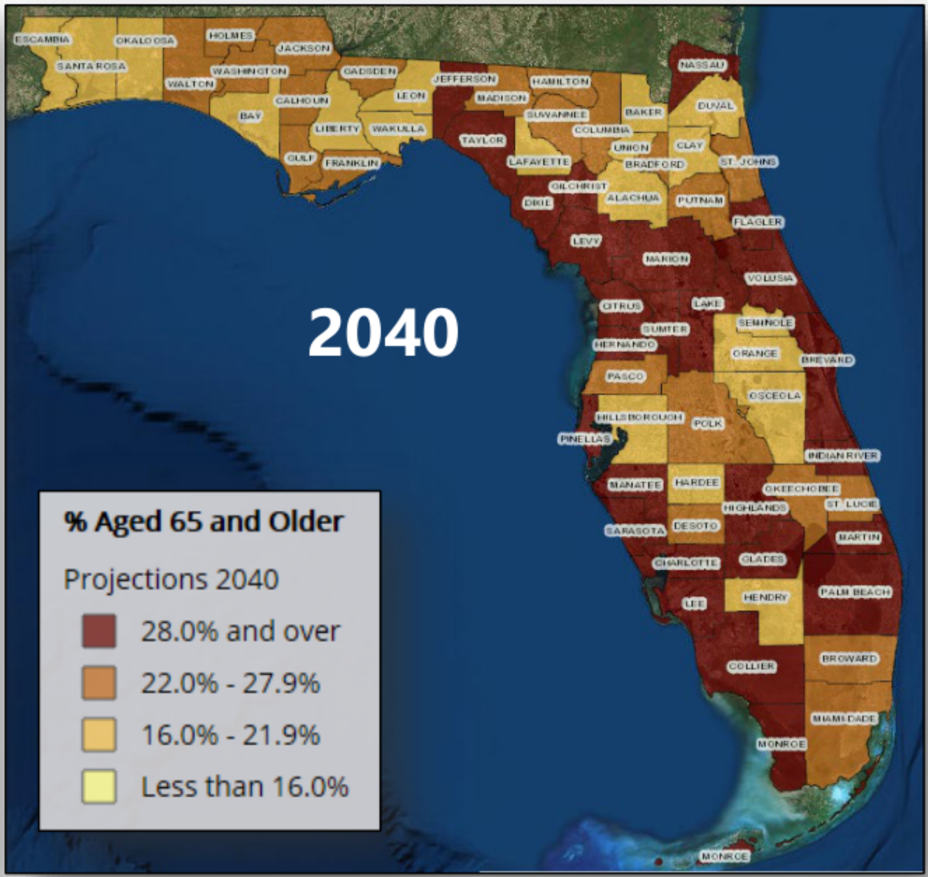
Median Age by County, 1970, 2010 and 2040



Sources: 1) BEBR Population Projections by Age, Sex, Race, and Hispanic Origin for Florida and Its Counties.
2) U.S. Census Bureau, Decennial Census of Population, 1970 to 2010.

Population Percentage Aged 65 and Older, 2010 and 2040



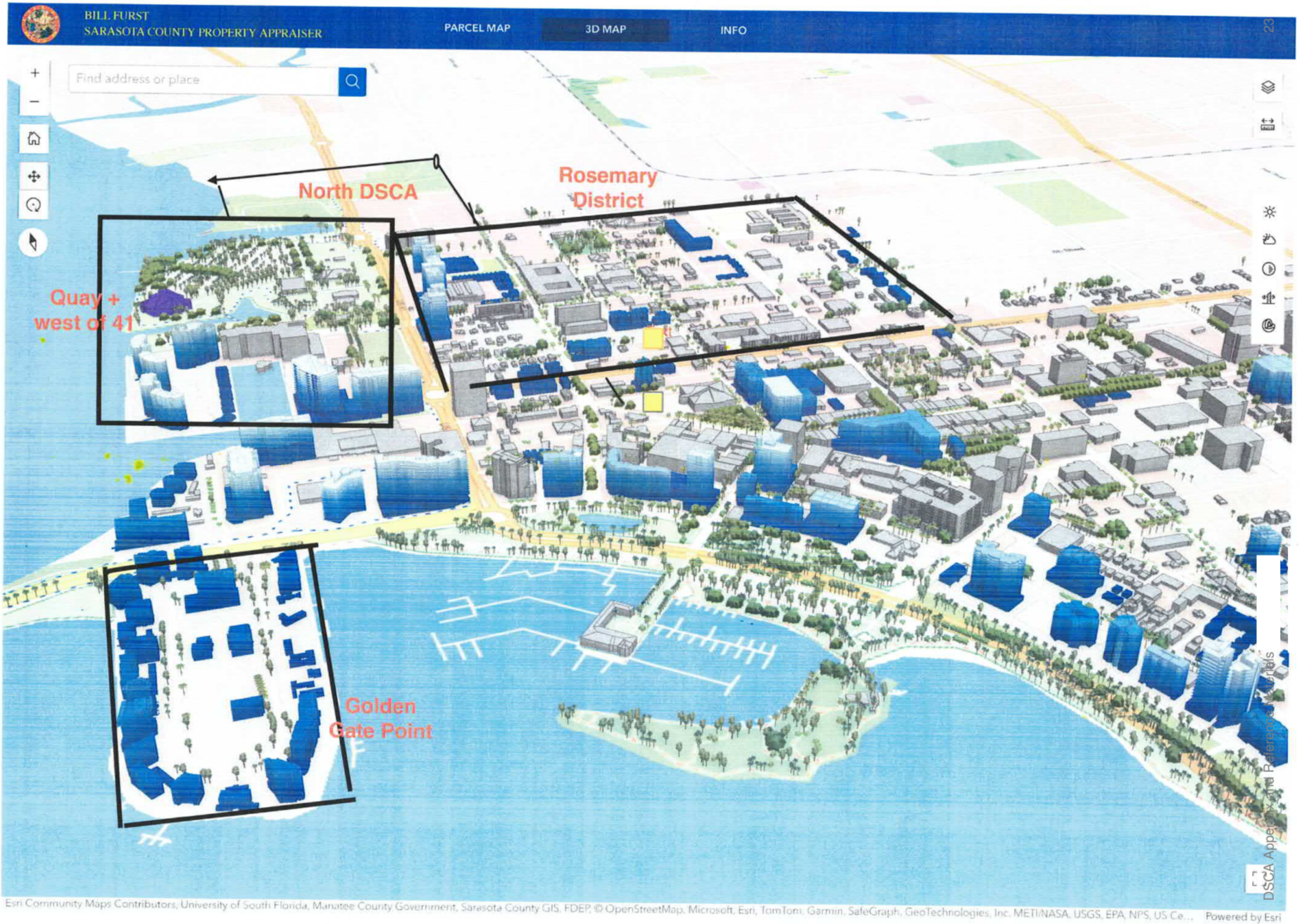


Source: Population Projections by Age, Sex, Race, and Hispanic Origin for Florida and Its Counties.

APPENDIX B

DOWNTOWN MAPS AND DEVELOPMENT PIPELINE

Maps, residential development tracking worksheets, project pipeline summaries, and related downtown growth reference materials.



BILL FURST
SARASOTA COUNTY PROPERTY APPRAISER
PARCEL MAP
3D MAP
INFO
Find address or place
North DSCA
Rosemary District
Quay + west of 41
Golden Gate Point
Esri Community Maps Contributors, University of South Florida, Manatee County Government, Sarasota County GIS, FDEP, © OpenStreetMap, Microsoft, Esri, TomTom, Garmin, SafeGraph, GeoTechnologies, Inc, METI/NASA, USGS, EPA, NPS, US Ce...
Powered by Esri

	5/14/26 **NEW RESIDENTIAL CONSTRUCTION…."DOWNTOWN " Sarasota incl GGP and Rosemary District**				
	DWELLING UNITS UNDER CONSTRUCTION 'DOWNTOWN'	condos or townhomes for sale	apts or townhomes for rent	Total estimated Attainable or Affordable	within TIF boundary
	Downtown - west of Orange				
2023-012018	The Edge Condos…. 290 Cocoanut……construction underway…topped out in 12/2026… TCO…early 2027?	27			
24-ASP-14	McGillicuddy Arts (FST) Plaza - 1233 1st….. Will include apts for performers….work proceeding on foundation		24	24	
	Downtown - east of Orange				
24-ASP-03	"Serēn Sarasota" - FKA Payne Park Townhomes , 200 S. Washington -w some retail….CO anticipated in late 2026		50	0	
	Rosemary District (incl Aspire on 10th proj at 10th and Cocoanut, not formally part of RD)				
2019-4241	"The Gallery" condos 1329 4th…topped out… CO in late 2026 possible	61			X
2023-007081	Bayside Club Apts - 850 Cocoanut - topped out at approx 1/2 of project		253	0	X
22-AA-09	Aspire on Tenth Apartments' - 1313 10th …..significant progress…CO likely by June 2026		157	47	X
24-ASP-06	Lofts on Lemon - Phase 2 - 851 N. Lemon. 100 apts, all under 80% AMI….. 8-stories - topped out at 5/2026		100	100	
	Quay Commons				
2024-002489	Ritz Carlton Residences...Block 7 & 8, 555 Quay Commons…TCO est 11/2026..punch list to floor 5 in progress	78			X
24-SP-05	One Park….topped out 4/2026…. Windows in to floor 15	86			X
	Golden Gate Point				
24-SP-15	Amara (FKA Pier 550 site) - -- construction work has started	54			
2023-009402	The Owen… 325 Golden Gate Point….BP issued 5/22/24 - construction in progress	29			
2022-009878	SIX 88 Condos - 688 Goldern Gate Point	10			
2022-010321	The Peninsula condos - 223 and 283 Golden Gate Point - CO 12/2025 - 20 units - removed from under const count	0			
	Est. "Downtown" Total under constuction residential apts and condos at 5 6 26 = 929	**345**	**584**	**171**	**61%** =Apartments
	Attainable number….(note: 100% of 100-unit Loft on Lemon 2 are attainable) =				
	Note: estimates do not include Gillespie Park				
	Source: Downtown Sarasota Condominium Association - DL				
	Other residential projects in the city's approval process…	condos or townhomes for sale	apts or townhomes for rent	Total estimated Attainable of total	within TIF boundary
	Downtown - west of Orange				

24-ASP-07	1260 N Palm mulitiple modification of original plan submitted…..14 unit… ……mtg w magistrate, city and Applicant on 1/23…deal said to be reached…CC denied site pln approval on 5 4 26	TBD			
25-ASP-09	Adagio apts/condo.1360 Ringling ...103 mkt rate Condos and 69 apts ADS deemed complete 10/16/25…status?	103	69	69	
25-ASP-04	Mira Mar - comp plan and zoning changes approved…..DRC full sign off 5/8/26 for both rennovation and new 70 units	70			
25-ASP-12	Waldorf Astoria…..96-unit total of which approx 7 are attainable apts .Full DRC sign off 5/2026, demo of Zenith expected to begin late 2026	86	7	7	
2024-002573	625 S. Palm - 5 story, 12-unit condo….-"groundbreaking" held 11/2024…but no further work..site is fenced	12			
	Downtown - east of Orange				
24-ASP-02	1718 Main Street Apartments original plan = 226 apts…w 25 attainable - 'making changes to plan'	TBD	TBD		
25-ASP-05	Tempo Hotel…1524 Fruitville….125 hotel rooms, 10-stories - DRC 9/17/25..no residential units	0	0		
25-ASP-01	"High Line" Condos 31 N. Osprey - 142 total units w 16 attainable - mixed use - - 11-stories - DRC Partial Sign off	126	16	16	
25-ASP-05	2101 Ringling (old Checkers diner site)….. 22 apts which incls 2 attainbable….6-stories...Tony Harpers Pizza and Clam restaurant…DRC process		22	2	
24-ASP-16	Sarasota Station….300 Audubon Place - approval ltr sent …271 total units of which 202 are attainable and 69 market	69	202	202	
25-ASP-08	"The Well" - 777 S. Palm - DRC 6/4/25 - hotel/condo model tech comments sent… M Bentley ltr of 5/7 re next DRC mtg	100			
	1776 Ringling….alley vacation…no site plan…. and 10-story …number of units unknown, .77 acres…50+- units?...….	TBD			
24-ASP-05	Artist Court Residences (possible new name for complex) - 200 S Washington - demo complete - status in flux		242	26	
26-AA-04	1703 Main SOTO site…Rev 2.0 modified appl recd 12/31/25 and deemed complete.27 condos and 160 hotels rooms .	27			
26-SP-08	Fruitville Townhomes (Bowling alley site) - DRC 4/1/26	46			
	Rosemary District				
23-ASP-10	The Boheme - 420 Kumquat condos		9	1	X
24-ASP-10	received 3/2/26.	19		2	X
23-ASP-13	Bayside North, 1250 10th Street... 7-story…w 2995 sq ft retail/restaurant …full sign off…approval ltr being drafted		96	15	X
24-ASP-08	Cohen Court Townhomes 1425 8th … DRC 6/18 partial sign off…. partial sign of of townhomes	9			
24--ASP-15	701 Cohen Way - 6 Townhomes…..full sign off reported 3/20/25….building permit appl made 11/7/25…approval ltr send approval ltr	6			
24-ASP-09	Rosemary Townhomes 1434 and 1442 9th St - partial sign off at 6/18 DRC - approval ltr sent 11/2025				
25-ASP-03	Saravela condos 5th and 41, 282 condos of which 40 are attainable -partial DRC signoff recd .site plan still under review.issues incl transiet housing ..	282		40	X
25_ASP-10	7th & Central - condo --- site plan submission 5 15 25 - …partial sign off..tech comments sent 11/1825	24			?
25-PRE-29	333 Cocoanut…. These condos replace the 1274 4th project… partial sign off 12/2025..tech comments 12/16/25	18			X
	McCown Towers 3 - 1300 BotA - 96-units senior apts.. 5k.retail…. 5 5 26 county approval of last funding piece…		96		
	Quay Commons and units west of 41				
24-SP-06	One Park West - Quay Block 9. site plan approved…. from 75 to 69 condos…likely 3-4 years off, if this proceeds…questionable so no est made				X
	Ritz Carlton , 'Tower 3' on BotA…old Hyatt hotel site	107			
24-ASP-17	Hyatt Centric Hotel and 1000BotA Mixed Use - two towers…incls 117 condos…and 174 rooms hotel - demo largely complete..with FPL bldg left..hotel to come first w foundation work in June '26	117			X
	Golden Gate Point				
	The Point…..625 Golden Gate Residences 631 and 633 GGP - said to be for sale w site plan approved	12			
	531 Golden Gate Point….empty lot - ownership and plans unclear	TBD			
	total planned units in addition to those under construction……	**1233**	**759**	380	
	total new dwelling units….apartments and condos/townhomes defined as: total under construction AND those in DRC process	**2921**			

CIRCA 2032" Theoretical Downtown" Population increase in season from current level based on 2921 new dwelling units currently under construction or planned = 4673 people (1.6 per unit) - "Downtown" = DSCA plus GGP

= recent significant changes/developments

5 6 26

Additional Notes

Potential new projects…. Status uncertain….

					X
2024 00227	Park District Apts…331 apts (10% attainable) ….4th Tech review docs 12/15/23 - 5th extension granted 2/9/24…10% need to be attainable - status uncertain		331		
	780SRQ Condos, 1351 Fruitville - 34 condos - plan approved by DS…no BP application at this time	34		2	
	Whitaker Lofts - 1455 N. Tamiami Trail - PB approval during 7/22…project said to still be active…ownership changed…project being reactivated???	21			
2023-006907	"The SOTA" 1703 Main, 16 Story (ground floor restaurant, 120 hotel rooms and 35 residential condos).stalled project?…demo permit issued - rumor at 10/2025 a revised project may be moving ahead at this site	35			
					X

Recently completed

Aster & Links	…..FKA 1991 Main -total units for two related project = approx 440…w 12 retail spots		440		
	2167 - 2197 Main - 7 Townhomes (Main at School) - status ?	7			
2023-007635	DeMarcay condos - 32 S. Palm - TCO and moves began in 10/2024…**31 units closed as 0f 1/2025…..39 total units-** 1st proj w car elevators	39			
2021-002507	The Cordelia Apartments - Quay Commons - first occupancy in 10/2024…assume 1/2 of 240 avail for rent at 6/2025 - 2/3 occupied at 10/2025?		240		X
2019-4978	Evolution Condos - 111 Golden Gate Point - - occupancy status…seems approx 6-8 units occupied	20			
2024-000013	EnPoint condo - 509 Golden Gate Point -	4			
2015-1432	1343 4th - 4th by the Bay, under construction for 5 years... Appears to be finished at 8/2025	6			
2022-010321	The Peninsula condos - 223 and 283 Golden Gate Point - CO 12/2025 - 20 units - removed from under const count	20			
2020-3627	Villa Ballada - 430 Kumquat - building permit issued 6/9/22 - 22 residential and 3 commercial units - some closings in 1/2026	22			X

Estimates based on Dev Services weekly rpts, DRC materials and building permits

Source: Downtown Sarasota Condominium Association - DL

APPENDIX C

QUAY AND WEST OF U.S. 41 PROPERTY VALUE ANALYSIS

This section includes DSCA's working analysis of taxable value, residential unit growth, and projected development activity within the Quay district and the area west of U.S. 41 between Fruitville Road and Boulevard of the Arts.

The worksheet detail is intentionally included rather than summarized because the assumptions are important. The exhibit shows parcel-level valuation data, current and projected dwelling-unit counts, estimated future taxable value, and the basis for understanding the growing tax-base concentration in this part of downtown.

The analysis is intended as a working reference and should be read as an estimate based on available property valuation data, known development activity, and stated assumptions as of the worksheet date.

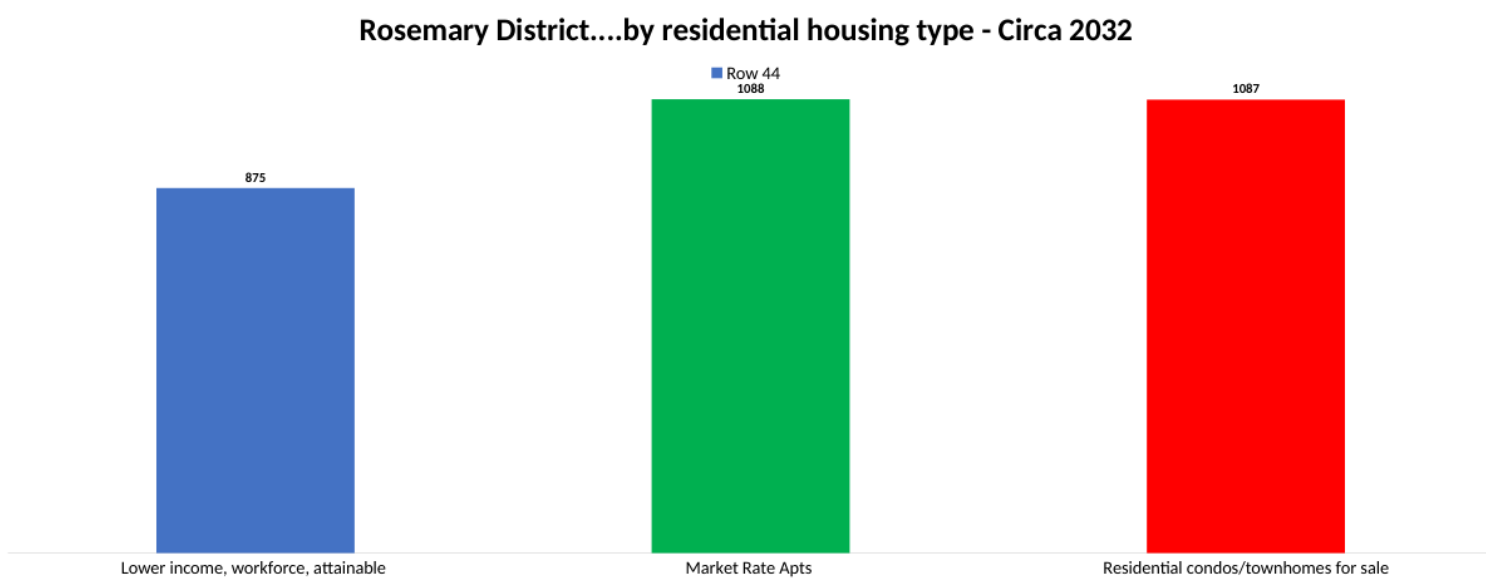
The following page is included in worksheet format to preserve the detail behind the analysis.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Property taxable value...and value per acre .... Border...West of 41 between Fruitvile and BotA....								2/15/26 - D Lough - rev 4				
2													
3			Accessors office valuation data 1/1/25 and projections for new construciton in 2030										
4	Quay - Residential buildings w some retail	county code	Dwelling units	Just	Assessed	taxable	sq ft property		2030 estimate for taxable			2035 estimate for taxable	
5	Ritz Residences Quay - Block 6, 401 Quay Commons	8640	73	$350,272,600	$338,025,547	$335,570,891			$369,127,980				
6	Bayso	8633	149	$209,006,200	$178,311,766	$174,674,617			$192,142,079	assume 2025 to 2030 change = +10%			
7	Cordelia Apts bldg		240	$74,931,400	$74,931,400	$74,931,400	71147		$82,424,540				
8	dwelling units at 1/2026		462										
9													
10	One Park Block 1 668 Quay Commons		86	$13,072,000	$13,072,000	$13,072,000	42869		$350,000,000	TCO anticipated Q3 2027			
11	Ritz-Carlton Residences - Sarasota Bay - 555 Quay Commons		78	$43,274,400	$43,274,400	$43,274,400	74071		$400,000,000	TCO anticipate Q4 2026			
12	One Park, West - Block 9 - 701 Quay Commons -site plan approved - 69 units		TBD	$11,400,000	$11,400,000	$11,400,000	22637		$11,400,000	assume no constrution on this site at 2030..and no change in parcel value			
13													
14	Commercial												
15	Belle Haven		na	$12,432,000	$12,432,000	$12,432,000	20605		$13,675,200.0	assume 2025 to 2030			
16	Ocean Prime		na	$6,128,700	$6,128,700	$6,128,700	9591		$6,741,570.0	change = +10%			
17	total Quay estimate at 2025		462			$671,484,008							
18	total Quay estimate at 2030		626						$1,405,094,599				
19													
20													
21													
22	Non Quay properties within "Quay+" area boundary												
23	1000 BotA (Hyatt site..residential and hotel) site 117 condos and 174 hotel rooms.		117	$24,043,600	$24,043,600	$24,043,600	154910		$200,000,000				
24	Ritz Carlton Residence Sarasota Bay II (former Hyatt site)		107						no estimate currently made			$350,000,000	???
25	Beau Ciel		44	$96,344,000	$77,473,211	$77,551,575	43,476		$85,306,733	assume 2025 to 2030			
26	Condo on Bay - Bldg 1 & 2		272	$277,730,100	$222,581,718	$214,033,572	106823		$235,436,929	change = +10%			
27	Condo on Bay Bldg 2						121887						
28	Condo on Bay -townhomes	incl in COTB valuation					49891						
29	total west of 41 w/o Quay at 1/2026			$398,117,700	$324,098,529	$315,628,747	476987		$520,743,662				
30													
31	total condo and apt units at 1/2026		778										
32	total condo and apt units at 1/2030		1166										
33													
34													
35													
36	2025 Quay+ other props west of 41 and north of Fruitville to BotA					$987,112,755							
37	2030 Quay+ other props west of 41 and north of Fruitville to BotA								$1,925,838,261				
38												$2.5 Billion total?	
39													
40	The Quay is approximately 14 acres...... rest of area is an estimated 11 acres (source: property tax apparisers data)												
41													
42	Assume 25 total acres.....			$39,484,510	= taxable value per acre..... As at 1/1/2025 valuations								
43				$77,033,530	" "	" "	Estimated at 1/1/2030						
44				$100,000,000	"	"	2035?						
45	blue = new construction planned....bold = currently under construction												

APPENDIX D

ROSEMARY DISTRICT DATA AND PROJECTIONS

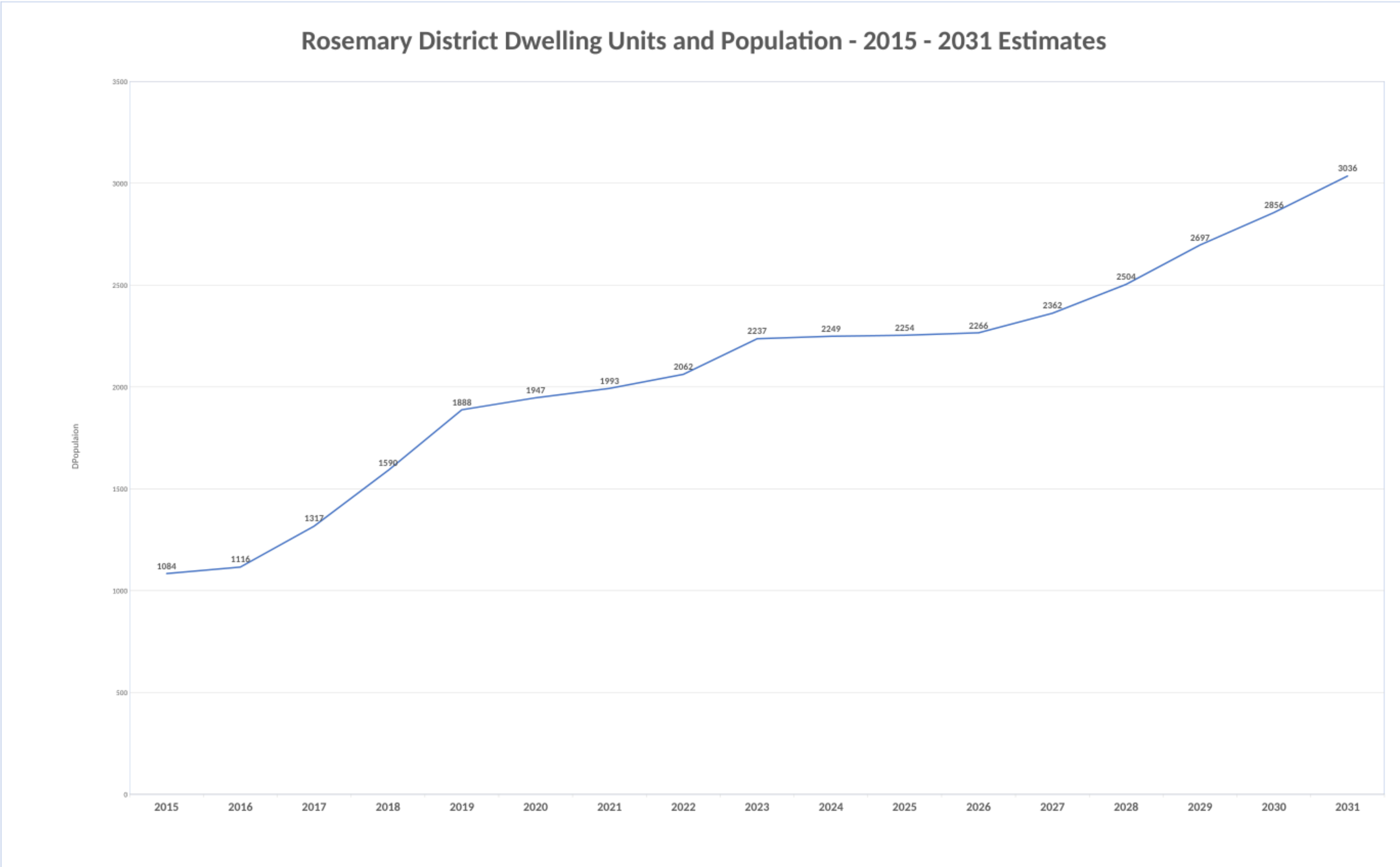
Residential growth, demographic estimates, attainable housing composition, density calculations, and development projections related to the Rosemary District.



	Lower income, workforce, attainable	Market Rate Apts	Residential condos/townhomes for sale	Total Dwelling units - Rosemary District - Circa 2032	Population at 1.6 people per unit
Residential Dwelling Units	875	1088	1087	3050	4880
Percentage of total	29%	36%	36%	100%	

	Assisted/attainable/affordabe units		Market rate apartments		Condos and Townhomes				
								Population/sq mile Equivilant =	24,400
	McCown Towers*	100	700 Cocoanut - CitySide	228	Renaissance Condos	243	243		
	McCown Annex*	75	650 Central	13	Alinairi	204	204	Population/acre=	38
	Jefferson Center*	209	710 Lemon - The District	286	BLVD	49	49		
	St Martha 1&2*	78	320 Central - Arcos Apts	228	Zahranda 1 and 2	24	24		
	Sarasota Opera	29	**Bayside Club - 850 Cocoanut**	253	Valencia	30	30	Rosemary Dist = 130 acres or .2 sq miles	
	Florida Studio Theatre	5	Bayside Club, North (80 of 96)	80	332 Cocoanut	32	32		
	Lofts on Lemon	128	2032	1088	Risdon on 5th	20	20	units at 2026=	2182
	Lofts on Lemon 2*	100	2026	755	The Gallery (4th and Cocoanut)	60	60		
	McCown Tower 3*	96			Melrose	10	10	density	17
	Bayside Club North, (15 of 96)	15			Rosemary Park Condos	40	40		
	Saravela (40 of 282)	40			Citrus Sq Units	32	32		
	2032	875			4th by the Bay	6	6		
	2026	624			Encore	15	15		
					4th at Cocoanut (SW corner)	16	16		
	= under construction bolded or planned				Villa Ballada - 430 Kumquat	22	22		
*	low income				7th & Central condos	24	803		
Note:	for the purposes of estimates the few single family homes are not included as most are vacant or planned for removal				Saravela (242 of 282)	242			
					333 Cocoanut	18			
					total condos and townhomes for sale 2032	1087			
					2026	803			

D Lough 5/6/26 rev 1


Rosemary District Dwelling Units and Population - 2015 - 2031 Estimates
DPopulaion
3500
3000
2500
2000
1500
1000
500
0
1084
1116
1317
1590
1888
1947
1993
2062
2237
2249
2254
2266
2362
2504
2697
2856
3036
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025
2026
2027
2028
2029
2030
2031

DL 1/26/26

Rosemary District

Existing Properties - January 2026	Address	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
Renaissance	750 N. Tamiami Trail	244	244	244	244	244	244	244	244	244	244	244	244	244	244	244	244	244
Alinari	800 N. Tamiami Trail	204	204	204	204	204	204	204	204	204	204	204	204	204	204	204	204	204
"The District"...FKA Elan Rosemary	710 N. Lemon				75	286	286	286	286	286	286	286	286	286	286	286	286	286
Arcos Apartments	1401 Fruitville				100	175	228	228	228	228	228	228	228	228	228	228	228	228
CitySide	700 N. Cocoanut			150	228	228	228	228	228	228	228	228	228	228	228	228	228	228
Jefferson Center	900 N. Tamiami	209	209	209	209	209	209	209	209	209	209	209	209	209	209	209	209	209
McCown Towers and Annex	1320 Blvd of the Arts	175	175	175	175	175	175	175	175	175	175	175	175	175	175	175	175	175
Lofts on Lemon (Phase 1)	Cohen Way									128	128	128	128	128	128	128	128	128
Rosemary Park	600-670 Cohen Way	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36
Citrus Square (Phase 1)	445 N. Orange		16	25	37	37	37	37	37	37	37	37	37	37	37	37	37	37
Citrus Square - Courtyard	505 N. Orange								17	17	17	17	17	17	17	17	17	17
Rosemary Square (Opera)	Blvd of the Arts at Central			30	30	30	30	30	30	30	30	30	30	30	30	30	30	30
Valencia at Rosemary Place (Phase 1)	Blvd of the Arts at Cocoanut			12	12	12	12	12	12	12	12	12	12	12	12	12	12	12
Valencia at Rosemary Place (Phase 2)	May Lane									18	18	18	18	18	18	18	18	18
Risdon on 5th	1350 5th St.					12	18	18	18	18	18	18	18	18	18	18	18	18
BLVD Sarasota	1224 Blvd of the Arts							10	22	49	49	49	49	49	49	49	49	49
The Courtyard at Citrus	461 N. Orange							8	10	10	10	10	10	10	10	10	10	10
332 Cocoanut Condos	332 Cocoanut							18	30	36	36	36	36	36	36	36	36	36
Casa Santa Marta 1	1576 8th St	78	78	78	78	78	78	78	78	78	78	78	78	78	78	78	78	78
Casa Santa Marta 2	800 N. Lemon	52	52	52	52	52	52	52	52	52	52	52	52	52	52	52	52	52
Florida Studio Theatre apartments	751 Cohen Way				8	8	8	8	8	8	8	8	9	9	9	9	9	9
Steinwach Opera Housing ...Rosemary Sq.	BotA							10	30	30	30	30	30	30	30	30	30	30
Mentone Court Condo	631 area of N. Orange		16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16
5th and Central	421 Central	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6
The Encore	1255 Fruitville	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15	15
Zahrada	1524 4th St.								6	6	6	6	6	6	6	6	6	6
Zrandara - Phase 2 - 18 condos	1558 4th										12	18	18	18	18	18	18	18
Rosemary Central	650 Central	13	13	13	13	13	13	13	13	13	13	13	13	13	13	13	13	13
Single Family Homes, duplexes and apt. (area bounded by 4th to 5th west of Cocoanut) *Estimate.*	4th and 5th - Central to 41	40	40	40	40	40	40	40	40	40	40	30	20	20	20	20	10	10
Single family homes (5th street between Central and Lemon)		3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3
Kumquat at 4th area. Homes, apts and duplex		9	9	9	9	9	9	9	9	5	5	4	4	4	4	4	4	4
Total est. existing units through 2031		1084	1116	1317	1590	1888	1947	1993	2062	2237	2249	2244	2235	2235	2235	2235	2225	2225

NEW CONSTRUCTION...IN PROGRESS AND PLANNED -

		total units	2024	2025	2026	2027	2028	2029	2030	2031
Bayside Club	850 N. Cocoanut	253					50	100	150	253
"The Gallery' condos	1305 4th	60				30	50	60	60	60
Villa Ballada	430 Kumquat	22			10	15	22	22	22	22
Lofts on Lemon (Phase 2)	Lemon	100				60	100	100	100	100
4th by the Bay	1342 4th St.	6				6	6	6	6	6
Total new ....Rosemary Dwelling units w new added				0	10	111	228	288	338	441

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
Grand total Rosemary dwelling units.....includes new units under construction at 1/2026	1084	1116	1317	1590	1888	1947	1993	2062	2237	**2249**	2244	2245	2346	2463	2523	2563	**2666**
Population at 1.6 per unit in 2025 and 2031 Population at 1/6 unit in 2031										**3598**							**4266**

In DRC process or beyond but not under construction		2027	2028	2029	2030	2031
711 & 717 Orange	19		12	16	19	19
Bayside North - 1250 10th	96			40	70	96
Cohen Court Townhomes 1425 8th ...	10	5	8	10	10	10
333 Cocoanut	18			6	10	2
Rosemary Townhomes 1434 and 1442 9th St	13	5	13	13	13	10
"The Boheme", Kumquat II.... - 420 Kumquat Court....	9	6	8	9	9	13
7th Street Condos	24				12	20
Saravela - condos	282			80	150	200
		16	41	174	293	370

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
	1084	1116	1317	1590	1888	1947	1993	2062	2237	2249	2244	2255	2346	2463	2523	2563	2666
Units assuming green projects get built - incl Saravela	1084	1116	1317	1590	1888	1947	1993	2062	2237	2249	2254	2266	2362	2504	2697	2856	**3036**

Rosemary Population at 2031 (at 1.6 per dwelling unit) **4858**

Population increase from 2025 **35%**

Rosemary Density per acre at 2031 = 37

APPENDIX E

GOLDEN GATE POINT

Residential inventory, development activity, and neighborhood reference materials related to Golden Gate Point.

Golden Gate Point Dwelling Units		3/24/26							
Address	Name	Current	under constuction	planned	total units circa 2030	year built			Property Record Information
111	Evolution	20			20	2024			
161	4-Plex	4			4	1949 with mods			
171	Shalimar	8			8	1968	"5-9 units per tax records"		2010-00-8031
126	The Phoenix	13			13	2001			
128	Vista Bay (Vista Bay Point)	17			17	2004			
166	Golden Bay	10			10	2002			
174	Harbor House	24			24	1967			
188	One 88	8			8	2015			
205	Toscano	6			6	1996			
223-283	Pennisula	20			20	2025			
226	Harbor House West	24			24	1968			
280	Aqua	8			8	2017			
325	The Owen		29		29				
350	Alta Mer	6			6	1969			
378	Renaissance	6			6	1993			
400	Harbor House South	13			13	1965			
420	Grande Riviera	13			13	2005			
464	La Bellasara	28			28	2005			
509	En Pointe	4			4	2024	completed 7/2024?		
531	three unit building	3			3	1945...rehab 2017			2010-09-0016
552-632	Amara		54		54				
565	Four-Plex	4			4	1953			2010-09-0019
575	Duplex (2, 2 bedroom units)	2			2	1962			
609	The Pearl	8			8	2017			
625	The Point - have final site plan sign off			12	12				
650	Harbor View	14			14	1962			
660	Marina View	8			8	1970			
688	SIX 88 (all floors poured)		10		10				2022-00-9878
Total Dwelling Units		271	93	12	376				
Total buildings		21	6	1	28				
removed	550, 554, 590, 616, and 632 Golden Gate Point.								

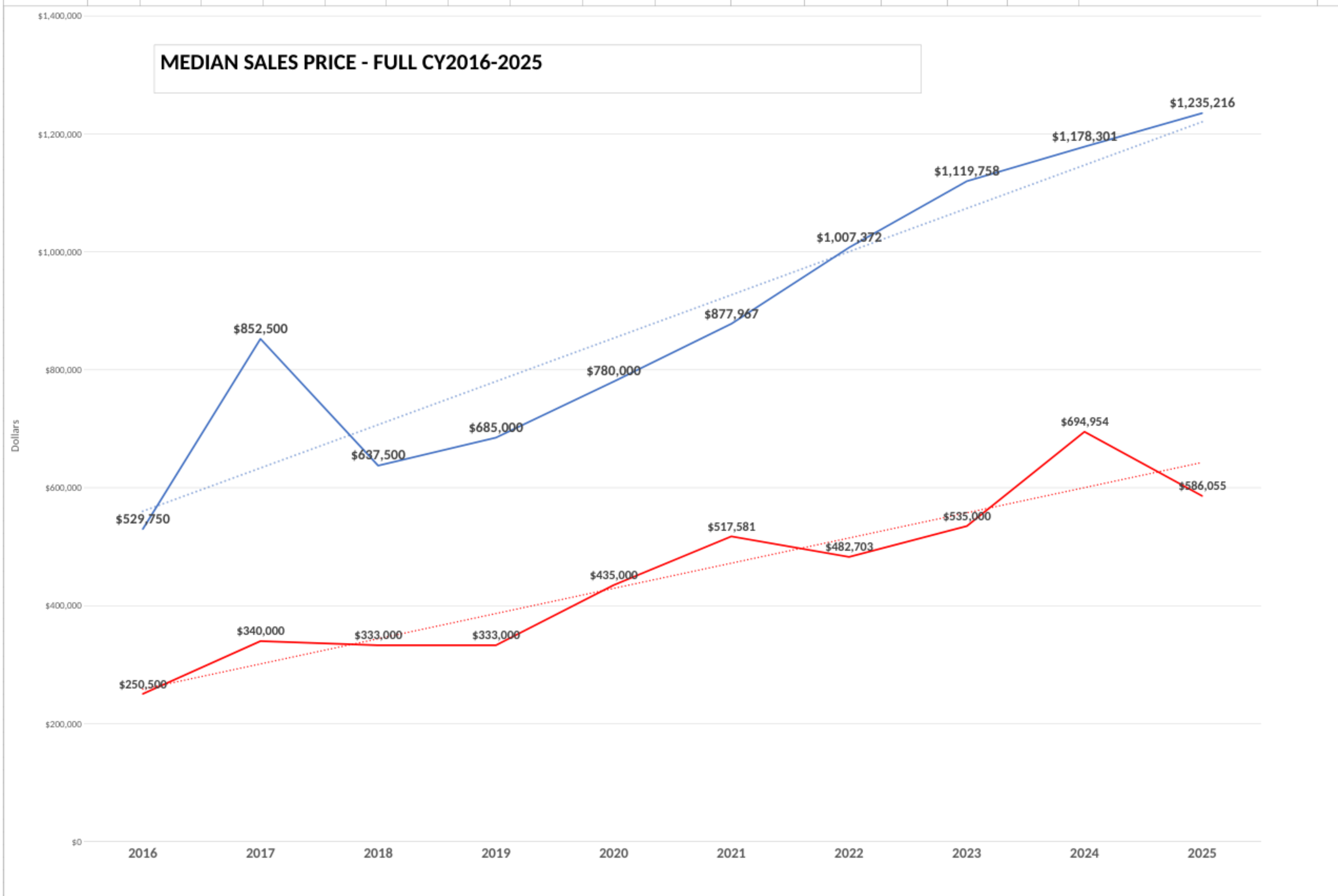
APPENDIX F

DOWNTOWN REAL ESTATE TRENDS

Charts, worksheets, and supporting materials related to condominium pricing, sales activity, transaction volume, and broader downtown residential market trends.

Note: 2025 figures are included for context only. Because some 2025 data was obtained from a different source than in prior years, year-to-year comparisons involving 2025 should be treated with appropriate caution.

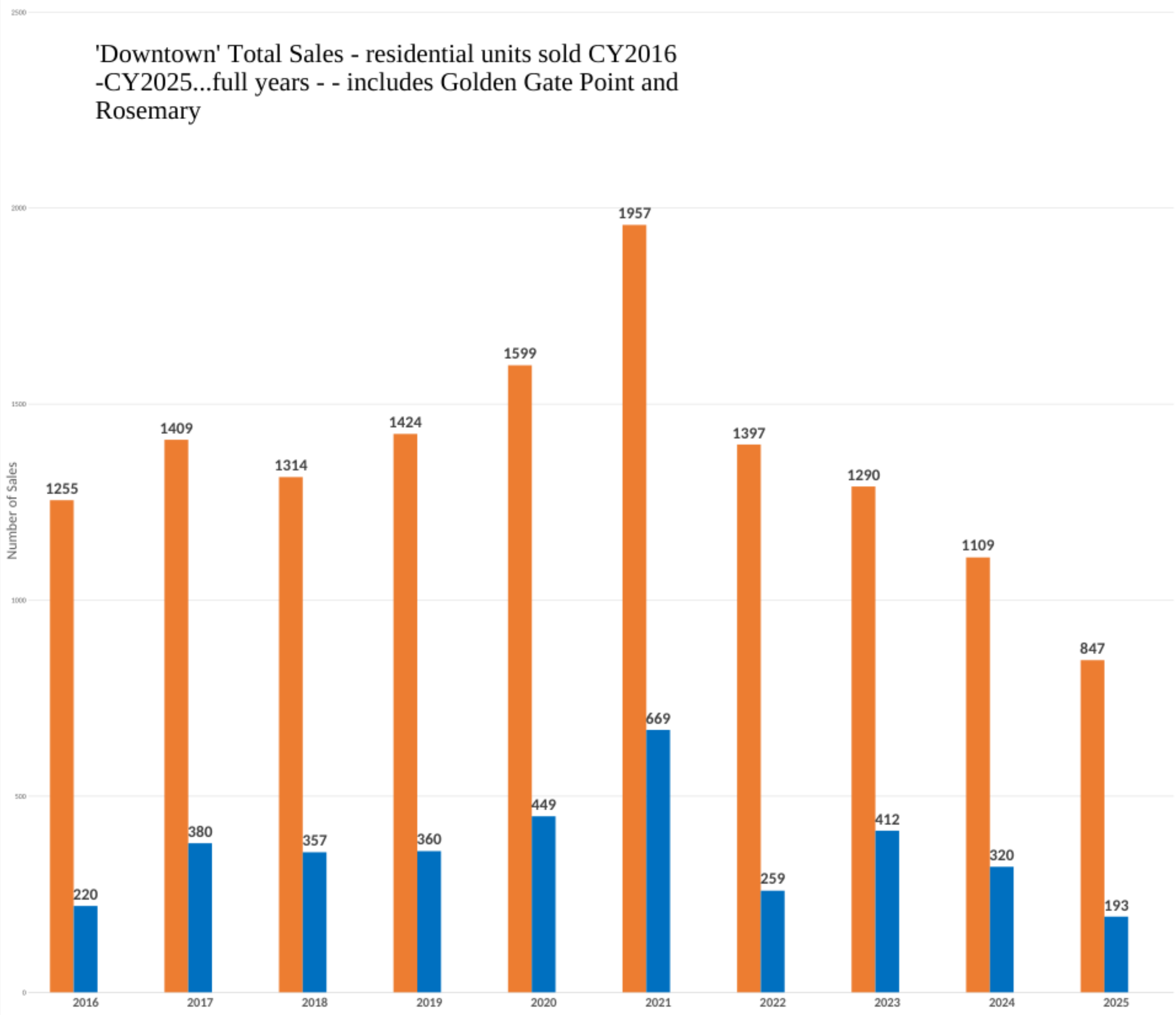
		2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	change, 2024 vs 2025
Citywide		$250,500	$340,000	$333,000	$333,000	$435,000	$517,581	$482,703	$535,000	$694,954	$586,055	15.67%
DSCA - 'Downtown'		$529,750	$852,500	$637,500	$685,000	$780,000	$877,967	$1,007,372	$1,119,758	$1,178,301	$1,235,216	5%



n-25	682500
	670000
	542500
	775000
	505000
	630000
	512000
	497500
	460000
	5274500
	586055.556
	58

DL 1/7/26

		2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	25 vs. '24
Citywide, Sarasota		1255	1409	1314	1424	1599	1957	1397	1290	1109	847	29%
'Downtown'		220	380	357	360	449	669	259	412	320	193	40%



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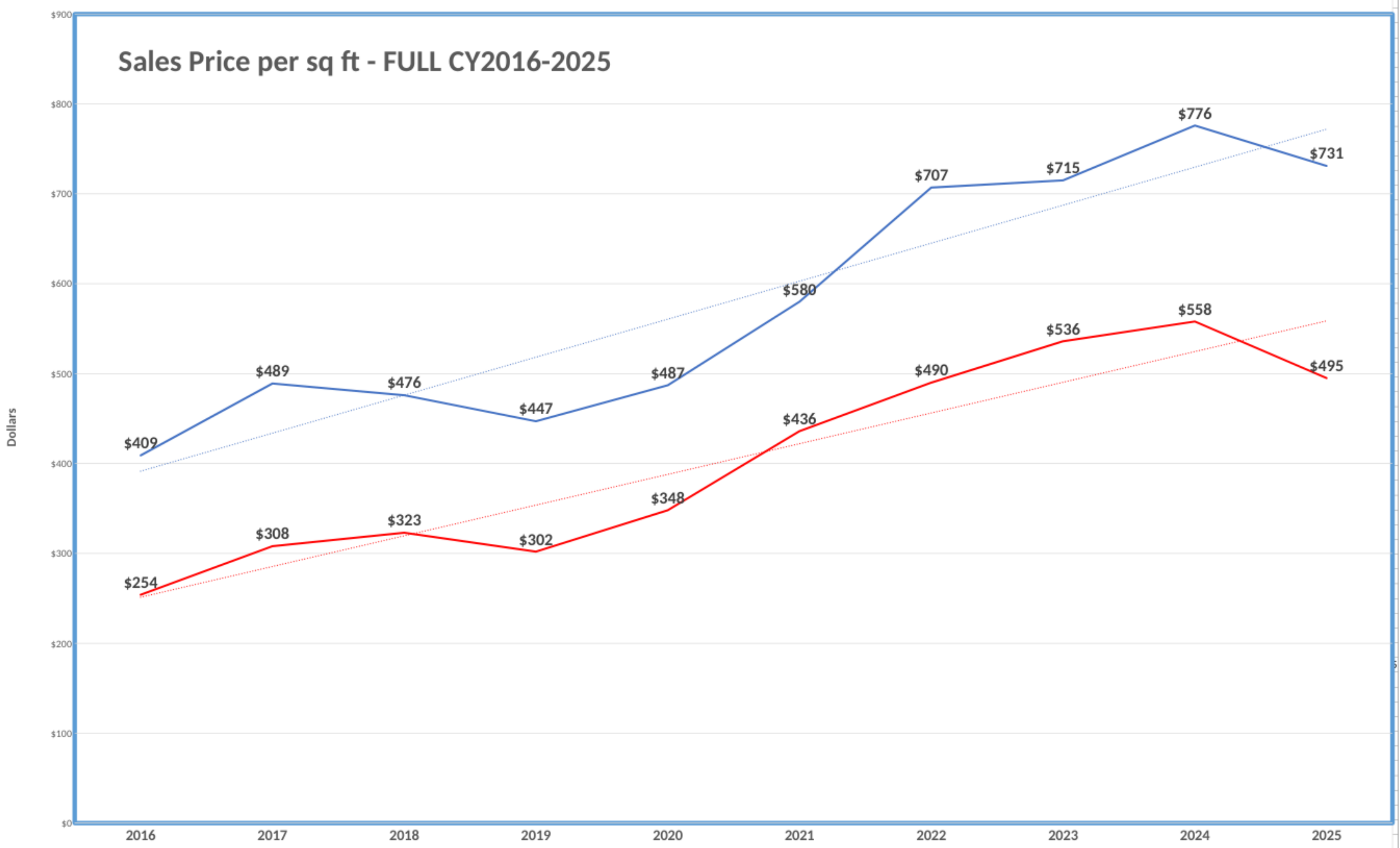
Data from MLS deemed reliable but not guaranteed....

		2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2024 vs 2025
City		$254	$308	$323	$302	$348	$436	$490	$536	$558	$495	11.3%
DSCA		$409	$489	$476	$447	$487	$580	$707	$715	$776	$731	5.8%



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Data from MLS deemed reliable but not guaranteed

APPENDIX G

SARASOTA ARTS, CULTURAL AND CIVIC ASSETS

An overview of Sarasota's arts, cultural, educational, civic, and experiential assets contributing to the city's identity and quality of life.

Appendix: Sarasota Arts, Cultural, Civic and Experiential Assets

Purpose. This appendix provides a working inventory of Sarasota arts, cultural, civic and experiential assets. It is not intended to be a complete directory. Rather, it is intended to show the breadth of Sarasota's cultural infrastructure and the extent to which arts, culture, education, public space, events and visitor experiences shape the city's identity and economy.

Major Performing Arts, Theater and Entertainment Venues

Institution / Location	General Location	Notes for Briefing Book
Van Wezel Performing Arts Hall	Bayfront / North Tamiami Trail	Major city-owned performing arts venue and current home for touring shows, Broadway programming, concerts and community events. Also central to discussions about the future Sarasota Performing Arts Center.
Sarasota Opera House / Sarasota Opera	Downtown / Pineapple Avenue	Historic downtown cultural anchor and one of the city's most visible performing arts institutions.
Florida Studio Theatre	Downtown / Palm Avenue area	Major downtown theater institution. FST presently operates five theaters in the heart of downtown and is pursuing an expansion expected to add two additional theaters, bringing the total to seven.
Urbanite Theatre	Downtown	Professional nonprofit theater focused on contemporary and new works.
Westcoast Black Theatre Troupe	North Sarasota / Orange Avenue area	Professional theater company with a distinctive role in presenting and exploring the Black experience.
Asolo Repertory Theatre	Near The Ringling / FSU Center for the Performing Arts	Major regional theater company and one of the area's leading professional arts organizations. Asolo's campus includes two theater settings used for professional performance and related programming.
Historic Asolo Theater	The Ringling campus	Historic performance venue within The Ringling campus.
The Sarasota Players	South Tamiami Trail / Crossings at Siesta Key area	Sarasota's longtime community theater organization, with live productions, training and community-based performing arts programming. Moving to new facilities at Payne Park
Sarasota Jewish Theatre	Performs at The Sarasota Players / South Tamiami Trail area	Theater company presenting plays and programs tied to Jewish experience, history, culture and broader human themes.
FST Children's Theatre / youth theater programming	Downtown; also serving schools and families citywide	Children's and family theater programming, including FST's Children's Theatre Series and school-based outreach. This also recognizes the broader youth theater activity associated with community theater programming in the Southgate / South Tamiami Trail area.
Circus Arts Conservatory	Bahia Vista / Sarasota area	Important local institution tied to Sarasota's circus history, with performance, education and training programs.
McCurdy's Comedy Theatre & Humor Institute	Downtown / East End, 1923 Ringling Blvd.	Longstanding Sarasota comedy venue and live entertainment destination. Adds stand-up comedy, evening activity and humor-related training to the downtown cultural mix.
Fogartyville Community Media and Arts Center	Near downtown	Listening room and community arts venue with music, art exhibitions, film screenings and educational events.

Music, Dance, Lectures and Concert Organizations

Institution / Location	General Location	Notes for Briefing Book
Sarasota Orchestra	Citywide / regional venues	Major cultural institution with broad community visibility and recurring use of local venues.
Sarasota Ballet	Sarasota / regional venues	Major dance institution with a national reputation and regular performance seasons.
Sarasota Contemporary Dance	Sarasota	Local professional dance company and part of the city's contemporary arts ecosystem.
Sarasota Concert Association	Multiple venues	Presents classical music and guest artists.
Artist Series Concerts of Sarasota	Multiple venues	Chamber music and concert programming.
Key Chorale	Multiple venues	Professional symphonic chorus; often collaborates with other arts groups.
Choral Artists of Sarasota	Multiple venues	Professional vocal ensemble and part of the area's music ecology.

Institution / Location	General Location	Notes for Briefing Book
Jazz Club of Sarasota / Sarasota Jazz Festival	Multiple venues	Longstanding jazz organization and festival programming that contribute to Sarasota's music identity.
Sarasota Music Festival	Multiple venues	Important seasonal classical music training and performance program.
Perlman Music Program Suncoast / Winter Residency	Multiple venues	Seasonal program associated with Itzhak Perlman and young classical musicians, including rehearsals, master classes and public performances.
Sill Lecture Series	Van Wezel and other major venues	High-profile lecture series that brings national and international speakers to Sarasota.
Ringling lecture and public programs	The Ringling campus	Lectures, talks, tours and public programs that extend The Ringling's role beyond museum visitation.

Museums, Visual Arts and Cultural Campuses

Institution / Location	General Location	Notes for Briefing Book
The Ringling / Ringling Museum of Art	North Sarasota / Bay Shore Road	One of Sarasota's major cultural anchors. The campus includes the Museum of Art, Circus Museum, Ca' d'Zan, Bayfront Gardens and Historic Asolo Theater.
Ringling College Museum Campus / galleries	North Trail / Ringling College area	Student, faculty and professional exhibitions; supports Sarasota's creative talent pipeline and the broader visual arts community.
Sarasota Art Museum of Ringling College	South Tamiami Trail	Contemporary art museum with galleries, education space, sculpture courtyard and public programming.
Marietta Museum of Art & Whimsy	North Trail / North Tamiami Trail	Distinctive smaller museum focused on whimsical and colorful art; part of the North Trail cultural mix.
Marie Selby Botanical Gardens — Downtown Sarasota Campus	Bayfront / South Palm Avenue	Botanical garden, living museum, historic site and major visitor destination.
Art Center Sarasota	Bayfront / near Van Wezel	Visual arts exhibitions, classes and community arts programming.
Historical Society of Sarasota County / "Oldest Museum"	Bayfront / Pioneer Park area	Local history organization located in historic buildings near the bayfront, including the Bidwell-Wood House and Crocker Memorial Church.
Sarasota County History Center	County facility	Research and archival resource for local history.
Mote Marine Laboratory & Aquarium	City Island / regional presence	Major marine science and visitor institution. Its aquarium presence and broader regional role should be noted as part of Sarasota's visitor, education and research ecosystem.
Center for Architecture Sarasota	Downtown / Orange Avenue area	Architecture, design, preservation and civic education.
Sarasota Architectural Foundation	Citywide	Important for modern architecture, preservation and public awareness of Sarasota School of Architecture.
City Hall Cultural Heritage Exhibit	Sarasota City Hall	Free rotating exhibit focused on Sarasota's cultural and architectural history.
City of Sarasota Public Art Program	Citywide	Public art collection, murals and public-space installations that contribute to Sarasota's identity and streetscape experience.

Universities, Colleges and Higher Education Institutions

Institution / Location	General Location	Notes for Briefing Book
New College of Florida	Bay Shore Road / Sarasota Bay	Public liberal arts college and the Honors College of Florida; an important educational, civic and bayfront institutional presence.
University of South Florida Sarasota-Manatee	North Tamiami Trail / near airport	Regional campus of USF serving Sarasota-Manatee, with undergraduate and graduate programs and community partnerships.
State College of Florida, Manatee-Sarasota	Bradenton, Lakewood Ranch, Venice and regional service area	Public state college serving workforce, associate, bachelor's and certificate needs across the region.
Ringling College of Art and Design	North Trail / Sarasota	Major arts, design, film, animation and creative economy institution; important to Sarasota's talent pipeline and cultural identity.
LECOM Bradenton / Lakewood Ranch	Lakewood Ranch / regional	Medical, dental and health education institution with regional workforce and health-care significance.

Arts Districts, Galleries and Creative Clusters

Institution / Location	General Location	Notes for Briefing Book
Palm Avenue Galleries	Downtown	Important downtown gallery corridor, with strong visitor and resident appeal.
Towles Court Artist Colony	South of downtown	Historic artist colony with galleries, studios and small-scale creative businesses.
Burns Court District	South downtown	Historic district with restaurants, cinema, shops, galleries and walkable character.
Rosemary District creative uses	North downtown	Includes smaller creative businesses, galleries, performance uses and evolving mixed-use activity.
North Trail / Ringling College creative corridor	North Tamiami Trail	Includes Ringling College, gallery spaces and creative economy uses.
SPAACES and smaller gallery/studio spaces	Citywide	Representative of smaller, independent visual arts venues.
Creative Liberties and local artist studio spaces	Sarasota	Example of smaller-scale artist workspace and exhibition venues.
The Bazaar on Apricot & Lime	East of downtown	Local makers, artists, food and community retail experience.

Film, Literary and Media Assets

Institution / Location	General Location	Notes for Briefing Book
Sarasota Film Festival	Citywide / downtown venues	Major annual film event and visitor draw.
Sarasota Film Society / Burns Court Cinema	Burns Court	Independent and art-house film venue; part of the Burns Court cultural experience.
WSLR + Fogartyville	Near downtown	Community radio, civic discussion, music and cultural programming.
Selby Library	Downtown	Downtown civic, educational and cultural anchor, including lectures, community meetings and public programming.
Bookstore1 Sarasota	Downtown	Literary programming, author events and independent bookstore activity.
Sarasota Magazine and local cultural media	Citywide	Helps document, interpret and promote the city's cultural life.

Parks, Public Spaces and Experiential Locations

Institution / Location	General Location	Notes for Briefing Book
The Bay Park	Bayfront	Signature public park along Sarasota Bay, with free community programming and major implications for the future cultural district.
Bayfront Park / Island Park	Downtown bayfront	Important downtown open space, waterfront walk, public art and visitor experience.
Overtown Square	Rosemary District	The City's newest small park and green space in the Rosemary District; a neighborhood-scale example of adding public open space in a more densely developing area.
Five Points Park	Downtown	Small downtown park and civic open space located at a highly visible downtown intersection.
Paul Thorpe Park	Downtown / Pineapple Avenue area	Small urban park and green space that contributes to downtown walkability and the public realm.
Payne Park	East of downtown	Major city park with trails, tennis, playgrounds, open space and community use.
Legacy Trail connection / Payne Park area	Downtown edge	Important recreational and mobility asset connecting downtown to the regional trail network.
Sarasota Farmers Market	Downtown Main Street / Lemon Avenue area	Weekly downtown gathering place and experiential retail/community activity.
Fresh Fridays	Downtown	Recurring downtown event series tied to music, restaurants and street activity.
Main Street dining and retail corridor	Downtown	Core visitor and resident experience area; relevant to cleanliness, walkability, retail curation and complete streets planning.
St. Armands Circle	Barrier island / city limits	Major experiential retail, dining and visitor destination within the City of Sarasota.
Lido Beach and Lido Key	City limits	Major recreational and visitor asset; important to city identity, tourism and quality of life.
Ken Thompson Park / City	City Island	Waterfront park, boating, fishing and access to the Mote area.

Institution / Location	General Location	Notes for Briefing Book
Island		
Sarasota Jungle Gardens	North Sarasota	Longstanding family-oriented attraction and part of Sarasota's visitor economy.

Historic, Civic and Heritage Assets

Institution / Location	General Location	Notes for Briefing Book
Historical Society of Sarasota County	Pioneer Park area	Local history organization and historic buildings, including Bidwell-Wood House and Crocker Memorial Church.
Sarasota County History Center	County facility	Research and archival resource for local history.
Newtown historic and cultural sites	North Sarasota	Important to understanding Sarasota's African American history and cultural legacy.
Owen Burns / Burns Court historic area	Downtown	Important historic urban fabric and pedestrian-oriented district.
Sarasota School of Architecture sites	Citywide	Major part of Sarasota's design identity and national architectural reputation.
Public art, murals and cultural heritage installations	Citywide	Should be treated as a citywide cultural asset, not only as decoration.

Festivals, Events and Recurring Cultural Experiences

Institution / Location	General Location	Notes for Briefing Book
Sarasota Film Festival	Downtown / multiple venues	Major annual cultural event.
Sarasota Music Festival	Multiple venues	Important classical music program.
Perlman Music Program Suncoast / Winter Residency	Multiple venues	Seasonal classical music residency and public performance program.
Sarasota Jazz Festival	Multiple venues	Annual jazz event tied to Sarasota's long jazz tradition.
Sarasota Chalk Festival	Sarasota area	Visual arts and street art event; location can vary by year.
Embracing Our Differences	Bayfront / regional	Outdoor art and education exhibition with strong civic and educational themes.
Fresh Fridays	Downtown	Recurring downtown activation event.
Sarasota Farmers Market	Downtown	Weekly civic and experiential anchor.
The Bay Park programming	Bayfront	Includes outdoor music, fitness, arts, movies and family programming.
Opera at The Bay and outdoor cultural programming	Bayfront / The Bay	Example of how major arts organizations use public space to broaden access.
Holiday parade and downtown seasonal events	Downtown	Important civic identity and downtown activation.
Pride, heritage and community festivals	Downtown / citywide	Reflect growing diversity of public programming.

Suggested Closing Note for the Appendix

This listing is not intended to be a complete directory. Rather, it is intended to show the breadth of Sarasota's cultural and experiential infrastructure. For a city manager, the key point is that arts, culture, education, public space, architecture, events, dining, galleries, parks and waterfront access are not separate issues. Together, they shape Sarasota's identity, downtown economy, visitor appeal, resident satisfaction and long-term competitiveness.

APPENDIX H

DOWNTOWN RESTAURANTS AND RETAIL INVENTORY

Working inventory of downtown restaurants, cafes, bars, and selected retail establishments illustrating the scale and diversity of downtown commercial activity.

Eateries "Downtown" Sarasota

(Bay, 301, Mound and 10th - incudes Rosemary and Quay)

DSCA - 5/1/26

	A	B	C
1	Kurtos Bakery	1312 Main	
2	Out and About Café	1316 Main	
3			
4	Classico	1341 Main	
5	Selva Grill	1345 Main	
6	The Fat Rabbitt - 2nd floor	1359 Main	
7	ofKours Bakery	1359 Main	
8	Café Amici	1371 Main	
9	Green Zebra Café	1377 Main	
10	First Watch	1395 Main	
11	Element Restaurant and Lounge	1413 Main	
12	Patellini Pizza	1429 Main	
13	Duvals	1435 Main	
14	Joe's on Main	1448 Main	
15	Brewsters	1454 Main	
16	Patricks	1481 Main	
17	Gator Club	1490 Main	
18	Bulgogi House Korean	1472 Main	
19	Pie on Main	1507 Main	
20	Pasty Arts Café	1512 Main	
21	Block 15 Cork & Craft	1528 Main	
22	Fresco Gelato and Coffee	1536 Main	
23	Peru 941	1537 Main	
24	Callebistro	1540 and 1544 Main	
25	Cask and Ale	1548 Main	
26	Bella Napoli Trattoria	1551 Main	
27	C'est La Vie	1553 Main	
28	Molly's Pub	1562 Main	
29	Marcel DW	1568 Main	
30	Drunken Poet	1572 Main	
31	1592 Wood Fired Kitchen	1592 Main	
32	Lilia	1576 Main	
33	Lucile Pizza and Wine Bar	1660 Main	
34	DD Roaster	1620 Main	
35	Mademoiselle Paris Café	1605 Main	
36	Coffee Carrousel Diner	1644 Main	
37	La Mucca Ballerina	1668 Main	
38	Cuba 1958	1766 Main	
39	Michelles Brown Bag Café	1819 Main	
40	Raffurty Bar and Grill	1888 Main	
41	Main Bar Sandwich Shop	1944 Main	
42	Mediterrraneo	1970 Main	
43	Fork and Hen SRQ?	1990 Main	
44	Kors Café (2nd location..Aster apt bldg)	1991 Main	
45	II Panificio Pizza	1995 Main	
46	CasaAntica	1213 N. Palm	
47	Tzeva Restaurant (Art Ovation Hotel)	1255 N. Palm	
48	Casami Italian Bistro	1272 N. Palm	
49	Kojo	1289 N. Palm	
50	Hana Bar/Restaurant	1289 N. Palm	
51	Palm Street Deli	1297 N. Palm	
52	Buddy Brew Coffee	1289 N. Palm	
53	Caragiulo's Italian	69 S Palm	
54	Waffle Monkey	52 S. Palm	
55	3Natives Acai	52. S Palm	
56	Sugar Champage Bar	127 S. Palm	
57	Bridges Restaurant (Embassy Suites Hotel)	202 N Tamiami Trl	
58	Evoq (Westin Hotel)	100 Marina View Dr.	
59	Roof Top Bar & Eats (Westin Hotel)	100 Marina View Dr.	
60	Jack Dusty (Ritz Carlton Hotel)	1111 Ritz Carlton Way	
61	Rufa (Ritz Carlton Hotel)	1111 Ritz Carlton Way	
62	Riley's Porch (Ritz Carlton Hotel)	1111 Ritz Carlton Way	
63	Marina Jacks	2 Marina Plaza	
64	O'Leary's Tiki Bar & Grill	5 Bayfront Dr.	
65	Florida Studio Theatre Café	1200 1st	
66	Sage	1216 1st	
67	Ionie Food	1444 1st	
68	Bijou	1287 1st	renovations in progress.
69	Rose and Ivy	1296 1st	
70	Starbucks	1401 1st	
71	Whole Foods coffee bar	1451 1st	
72	99 Bottles	1425 2nd	
73	~~Circo SRQ~~	1435 2nd	
74	SoFresh Bowl	1455 2nd	
75	Bare Blends	1425 2nd	
76	Tsunami Sushi	100 Central	
77	Mattison's Sarasota	1 N. Lemon	
78	Farmers Table	14 N. Lemon	
79	Salute	23 N. Lemon	
80	Beso	30 S. Lemon	
81	Boca	19 S. Lemon	
82	Toastique	10 S. Lemon	
83	Hyde Park Steak House	35 S. Lemon	
84	FushiPok & Ramen	128 N. Orange	
85	Michelles Brown Bag Café #2	630 S Orange	
86	State Street Restaurant	1533 State	
87	Bricks	1528 State	
88	Comida	1534 State	
89	Jimmy Johns	1626 Ringling	
90	Melting Pot restaurant	1949 Ringling	

Restaurants and Eateries "Downtown" Sarasota

(Bay, 301, Mound and 10th)

	A	B	C	D	E	F	G	H	I
91	The Office	1989 Ringling		DSCA - 5/1/26					
92	PF Chang	766 S Osprey							
93	Tamiami Tap	711 S Osprey							
94	The Fountain	543 S. Pineapple							
95	Project Coffee	538 S. Pineapple							
96	Owen's Fish Camp	516 Burns Court							
97	D Corato Ristorante	322 S. Washington							
98	Indigenous Restaurant	239 S. Links							
99	Voco Hotel (Off Shore restaurant)	1223 BotA	Rosemary District						
100	Sarasota Modern Hotel (Wink Restaurant)	1290 BotA							
101	Toasted Mango	1371 BotA							
102	Great Heights Creamery	1371 BotA							
103	Origins Pizza and Craft Beer	1371 BotA							
104	Wolfies restauant	1420 BotA							
105	Spice Station restaurant	1438 BotA							
106	The BLVD Café	1580 BotA							
107	RADD Royal Teas	580 Central							
108	Arts & Central restaurant	611 Central							
109	The Artisan Cheese Company	550 Central							
110	Rosemary & Thyme	511 N. Orange							
111	Pazzo on Orange	481 N. Orange							
112	The Breakfast Company	411 N. Orange							
113	Station 400 Restaurant	400 N. Lemon							
114	Lefty's Oyster Bar and Seafood	482 N. Lemon							
115	Station 400 Restaurant	400 N. Lemon							
116	Food + Beer Restaurant	1525 4th							
117	Hanami Japanese Restaurant	1525 4th							
118	Vino Bistro	1419 5th							
119	Project Coffee	1419 5th							
120	Dog Bar Sarasota	1324 10th							
121	Ocean Prime	501 Quay Commons							
122	Turmeric Restauarnt	1001 Cocoanut							
123	Siegfrieds Restaurant	1869 Fruitville							
124	Breakfast House	1817 Fruitville							
125	Kams Bubble Tea and Sushi	1813 Fruitville							
126									
127									
128	**under construction**			est # of seats					
129	1000North Club	520 Tamiami Trail	Rosemary	240					
130	Warren restaurant	1400 Main	Downtown core	250					
131	Foxtail Coffee	468 Quay Commons		180					
132									
133									
134									
135									
136									
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138									
139									
140									
141	D.L. -DSCA								

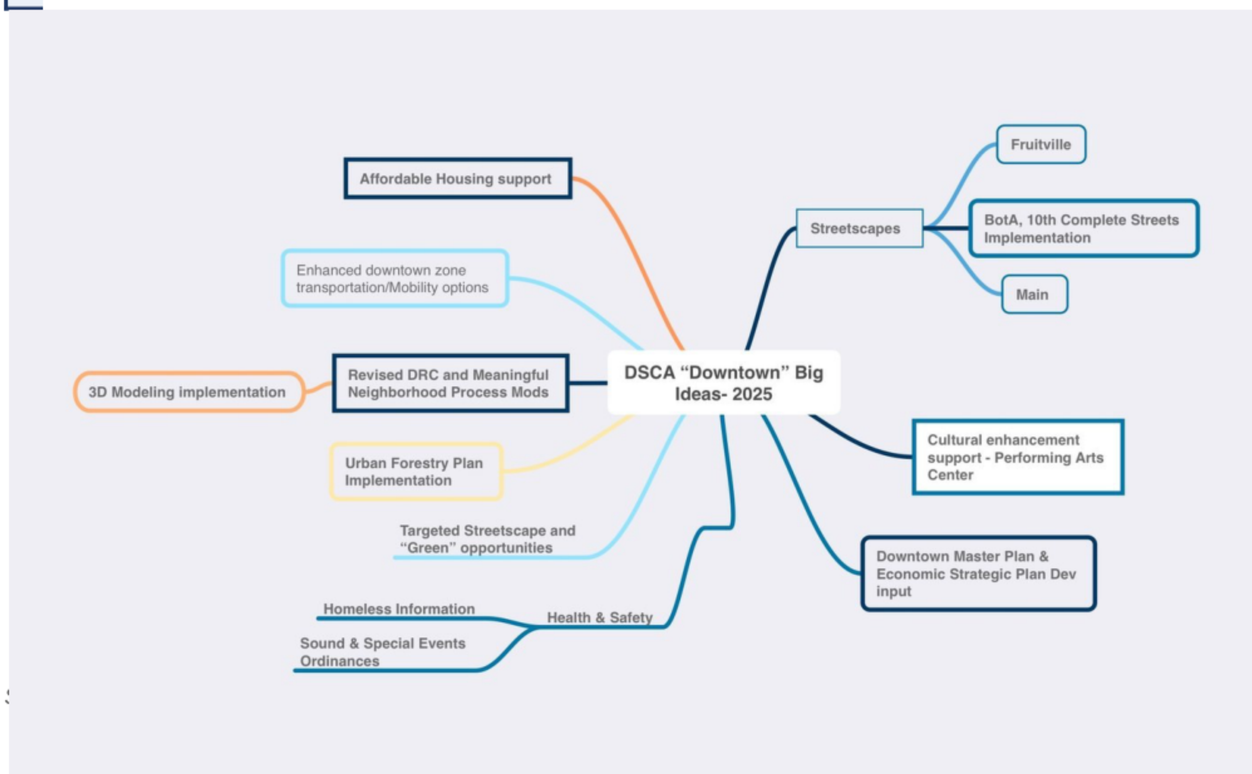
Appendix I

DSCA Strategic Planning Framework

The 'Big Ideas' mind map - DSCA's internal view of downtown priorities

The mind map referenced here represents DSCA's internal strategic framework for downtown Sarasota priorities, developed in 2024–25. It is included as a window into how DSCA thinks about and organizes its advocacy — radiating outward from a central set of concerns about the downtown's physical environment, governance, culture, safety, and economic sustainability.

> **How to read this**
>
> Each branch of the framework represents a priority cluster. All branches connect to DSCA's dual test: quality of life for downtown residents AND economic sustainability for the city.



Source: DSCA "Downtown" Big Ideas Mind Map, 2024-25 - internal strategic planning document

Appendix J

DSCA Engagement Examples - 2025

Selected accomplishments across six pillars of DSCA activity in 2025

DSCA's 2025 work spanned policy advocacy, public safety, housing, information, partnerships, and education. The summary below illustrates the breadth of engagement and the kinds of city-government touchpoints DSCA maintains across the year.

City Policy & Advocacy	• **Special Events Ordinance** — provided resident input on the revised ordinance, supporting a framework that preserves downtown activity while reducing disruption to residential areas. • **Sound Ordinance** — submitted recommendations to the City Attorney's Office on revisions, helping clarify measurable standards for vehicular and outdoor amplified noise, including bass measurement (dBC) and excessive vehicle revving. • **Downtown Master Plan** — advocated for funding and staffing to support an updated plan; participated actively in the Economic Strategic Development Plan process. • **Budget Town Hall** — helped sustain the City's Budget Town Hall as a venue for resident input into the FY26 budget cycle.
Public Safety & Street Design	• **BotA / Tamiami Trail intersection** — collaborated with city staff and FDOT on safety concerns, resulting in interim improvements for pedestrians and cyclists. • **SPD Real Time Operations** — assisted Sarasota Police Department on use of safety and driver-behavior data, including camera placement at the Gulfstream and Fruitville/41 roundabouts. • **CityWatch program** — launched in cooperation with SPD, encouraging residents to report street-level concerns through the Click-to-Fix system. • **Zebra Awareness** — continued public outreach at key roundabouts to encourage drivers to yield to pedestrians and reduce aggressive acceleration.
Housing & Livability	• **Saravela project** — engaged with developer, city staff, and neighboring residents on adjustments that strengthened the public realm and added affordable housing. • **1260 N. Palm and Hyatt redevelopment** — helped shape proposals to better balance intensity, height, and neighborhood context. • **Bay Park development workshop** — requested community workshop on a major proposed project across from The Bay Park, ensuring public review of height, hotel use, traffic, and pedestrian needs. • **New-building outreach** — established early communication with new residential communities, including Cordelia, to build awareness of DSCA and encourage collaboration.

Information & Preparedness	• **Biennial comprehensive condo survey** — produced building-level metrics for boards and residents to use in planning, budgeting, storm readiness, and maintenance. • **DSCA Development Workshop** — convened land-use attorneys, developers, and community members on zoning, height transitions, parking, and design. • **Condo Market & Insurance Workshop** — provided practical guidance for boards and owners in response to storm impacts and changing market conditions. • **Drone imagery** — commissioned aerial captures of key sites (Saravela, 4th & Cocoanut, BotA/41) to document conditions and inform DSCA positions.
Partnerships & Representation	• **City and County departments** — sustained working relationships with Planning, Development Services, Public Works, Parks & Recreation, and county leadership. • **Civic organizations** — maintained ties with CCNA, the Chamber of Commerce, the Downtown Improvement District (DID), and the Rosemary District Association (RDA). • **Bay Park Conservancy** — participated in Phase 1 operations and Phase 2 planning. • **Performing arts** — engaged with Van Wezel Performing Arts Hall and the Sarasota Performing Arts Foundation on the future of the existing hall and the new performing arts center.
Education & Outreach	• **Monthly board meetings** — guest speakers throughout 2025 included the Interim City Manager, the City Attorney, the Police Chief, the County Commissioner for District 2, the SPAC Foundation CEO, the Bay Park Conservancy CEO, and others. • **Workshops and town halls** — including "The Exploding Costs of Living in Paradise," "Downtown: Dysfunction or Diversity?," "Sarasota's Rapid Growth: Boom, Bubble or Bust," and "The Future of Homelessness Solutions in Downtown Sarasota." • **Newsletters and news flashes** — monthly updates and topic-targeted flashes; consistent open rate above 50%. • **Online presence** — expanded reach through DSCA website, YouTube channel for archived workshop and meeting video, and social media.

Source: DSCA 2025 Accomplishments record; DSCA board minutes and member communications, 2025.

Appendix K

Sample DSCA Newsletter

A representative example of DSCA's monthly member communications

DSCA distributes a Community News Update to its members each month, with consistent open rates above 50%. The April 2026 issue shown below is representative — covering city government developments, public safety initiatives, the Downtown Master Plan process, and announcements of relevance to downtown residents. The issue includes a welcome to incoming City Manager Karie Friling.

DOWNTOWN SARASOTA
DSCA
CONDO ASSOCIATION

Community News Update

April 2026

President's Message

Dear DSCA Members and friends,

Another busy month here in The City of Sarasota! This issue of the DSCA news update covers many important items. We have a new City Manager and a proposed consultant to help with the Downtown Master Plan. DSCA is working with the Commissioners and Staff on a new Sound Ordinance as well as one for Special Events. Over the years we have helped the city make the Budget process more transparent. The city will now have TWO Budget Townhalls in the coming months. Parking, downtown as well as the Rosemary district, has been a hot topic. At the next DSCA Board meeting on May6th, Broxton Harvey, General Manager of Parking will present. Phase 2 of the Bay Park is underway, and a smaller version of a performing arts center is being architected. Details to follow!
Warm Regards,
Patrick McNamee
President, Downtown Sarasota Condominium Association (DSCA)
DowntownSarasotaCondoAssoc.com

City News

New City Manager - Karie Friling

Source: DSCA Community News Update, April 2026 (page 1 of multi-page issue)

Selected Excerpts from the April 2026 Issue

The full April 2026 newsletter spans approximately 10 sections, drawn from across DSCA's areas of engagement. The excerpts below illustrate the editorial range — from procedural updates on the Master Plan and parking, to substantive policy commentary on the west-of-41 district convergence.

Downtown Master Plan Update

Work on developing an updated Downtown Master Plan, which began in March of last year, reached an important milestone at the April ad hoc committee meeting. Following an initial evaluation on March 24, the selection committee convened for final interviews on April 1 and voted to recommend moving forward with MKSK as the city's planning consultant. MKSK presented a comprehensive approach built around community engagement, data analysis, and stakeholder collaboration, drawing on experience in comparable projects in cities including Toledo and Decatur, with an emphasis on resiliency, transportation, and economic development. Contract negotiations were anticipated to begin in mid-April, with staff targeting the May 18 City Commission meeting for both the proposal and contract approval. A full master plan committee meeting with the consultant is anticipated in mid-June, marking the formal launch of the planning process.

Sound Ordinance and Soundscape Study

On March 23, the City Commission hired Siebein Associates, an acoustics consulting firm, to review Sarasota's sound levels in Downtown, Newtown, the Sarasota High School neighborhood, and St. Armands. Issues involving street performers and loud vehicles will also be studied. The effort will cost between $175,000 and $250,000. On April 6, the Commission asked the City Attorney to direct the consultants to begin a near-term review of the draft sound ordinance prepared by former City Attorney Bob Fournier — with the goal of avoiding delays to needed changes such as the plainly audible standard and the ban on motor vehicle revving. Sound measurements are scheduled from May through August.

Parking — West of U.S. 41: A District-Wide Convergence

What's happening west of U.S. 41 is no longer a Rosemary District issue — it's a district-wide convergence. The Quay, Bay Park, and Rosemary now function as one connected place, and their parking and mobility needs should be planned the same way. The 2018 Quay Master Plan assumed a shared model — on-site spaces, the Cordelia garage, valet, and walkability working together — and never assumed the Quay would stand alone. If a meaningful share of Cordelia's roughly 150 public spaces are now leased privately, available supply is shrinking just as demand is peaking. Demand is arriving from multiple directions: Cordelia restaurants are filling; the Ritz-Carlton Residences and One Park are moving toward occupancy; a 174-room hotel is coming to the Quay; Bay Park Town Square opens later this year; a performing arts center remains in play. At full build-out, the west-of-41 district could support six or more restaurants. Into that picture, the McCown site is uniquely positioned — one of the only parcels with the geographic reach to serve the Quay, Bay Park, and the Rosemary edge simultaneously.

Bay Park Phase 2 Update

Structural improvements on the south side of the 10th Street public boat basin, a rehabilitated seawall, and new courtesy floating day docks are complete. The 'front of the park' on North Tamiami Trail opened in October 2025 with a landscaped multiuse trail, improved parking, and a promenade connecting the cultural district. A new town square between the art center, community center, and municipal auditorium is under construction with public opening targeted for October 2026. The Bay Park Conservancy is rehabilitating the municipal auditorium for early 2027 reopening. Phase 3 plans include replacing the surface parking lot — the single biggest polluter on the site — with a center-of-the-park design overlooking Sarasota Bay. Site use has more than doubled since Phase 1 opened in October 2022, with 330,000 guests in 2025 and 107,000 in Q1 2026 alone.

Budget Town Halls

Two Budget Town Halls are scheduled — May 5 and August 5, 2026, both at 5:30 PM. These meetings give residents an opportunity to learn about Capital Improvement Program projects, utilities, and public parking, and to provide meaningful input. DSCA has long advocated for resident participation in the budget process and views these town halls as a constructive step.

Source: DSCA Community News Update, April 2026 — selected excerpts

Appendix L: Tourism Supporting Data

The narrative above keeps figures to a minimum. The tables below provide the underlying data for those who wish to verify or dig deeper. All figures are countywide (Sarasota County does not report visitor statistics by municipality) and are drawn from official sources.

A. Three-Year Trend (FY2023–FY2025)

Measure (Sarasota County)	FY2023	FY2024	FY2025
Total visitors	~3.08 million	2,894,100	2,710,700
Direct visitor spending	~$2.60 billion	~$2.55 billion	~$2.30 billion
Total economic impact	~$4.28 billion	~$4.03 billion	~$3.60 billion
Tourist Development (“bed”) tax	~$50.0 million	$48.37 million	~$48 million

Source: Visit Sarasota County / Downs & St. Germain Research annual visitor reports; Sarasota County Tax Collector. Figures by fiscal year (Oct–Sep); rounded; FY2023 approximate. Note on the bed tax: the 6% Tourist Development Tax is a single countywide levy collected by the Sarasota County Tax Collector and pooled at the county level; it is not reported or budgeted as a City of Sarasota total, so no clean city-only figure exists. It is paid by visitors, not residents — Visit Sarasota County estimates this offsets about $583 per county household in taxes annually — and is restricted by law to tourism-related uses (beaches, arts and culture grants, spring-training facilities, tourism marketing).

B. Early-2026 Monthly Readings

Measure	January 2026	March 2026
Visitors (paid accommodations)	68,900 (down 12.7% YoY)	158,500 (up 1.7% YoY)
Direct visitor spending	$132.1M (down ~8.5%)	$234.3M (about flat)
Average lodging rate	~$285 (up from ~$269)	$402 (record March rate)
Lodging occupancy	61.4% (from 69.4%)	—

Source: Visit Sarasota County / Downs & St. Germain Research monthly visitor dashboards, as reported (early 2026). Fiscal-year-to-date (Oct 2025–Mar 2026) paid-accommodation visitation was down about 4.4%. These monthly readings are more volatile than annual figures and should be read as a snapshot. Visit Sarasota County characterizes the pattern — softer volume, higher rates, flat spending — as a “K-shaped” visitor economy.

C. Selected Reference Figures

- **Airport (SRQ):** record 4,514,781 passengers in calendar 2025 (up 6.34%); 11 airlines, ~68 nonstop destinations; new $100M five-gate Concourse A (Jan 2025); ~4 miles north of downtown.
- **Event space:** former Hyatt Regency ballroom ~10,000 sq ft (within ~20,000 sq ft of meeting space); replacement Hyatt Centric Harborside slated for just over 7,000 sq ft. No countywide convention center.
- **Sports tourism:** Nathan Benderson Park (only FISA Class A 2,000m rowing course in North America); USRowing Youth Nationals ~4,000 athletes and $5M+ impact per event; IMG Academy (Bradenton, ~500 acres) ~200,000 athletes/participants a year; planned ~$32–$40M indoor complex; VSC FY2026 budget ~$1.2M for sports recruitment.
- Selby Gardens: 300,000+ visitors/year; Phase One opened 2024 (world’s first net-positive-energy botanical garden complex); Phase Two broke ground December 2025.
- The Bay Park: ~53 acres, ~$200M; Phase 1 (10 acres) open since 2022; the Plaza opens October 2026; Municipal Auditorium (1938) renovation begins mid-2026.