

Florida Population Trends & BEBR Methods

2025 SWANA Florida Winter Conference

Gainesville, FL
February 24, 2025

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Bureau of Economic and Business Research
University of Florida

Agenda

- ❖ Introduction
- ❖ Population Estimates
- ❖ Population Projections
- ❖ Components of Growth
- ❖ Questions & Discussion



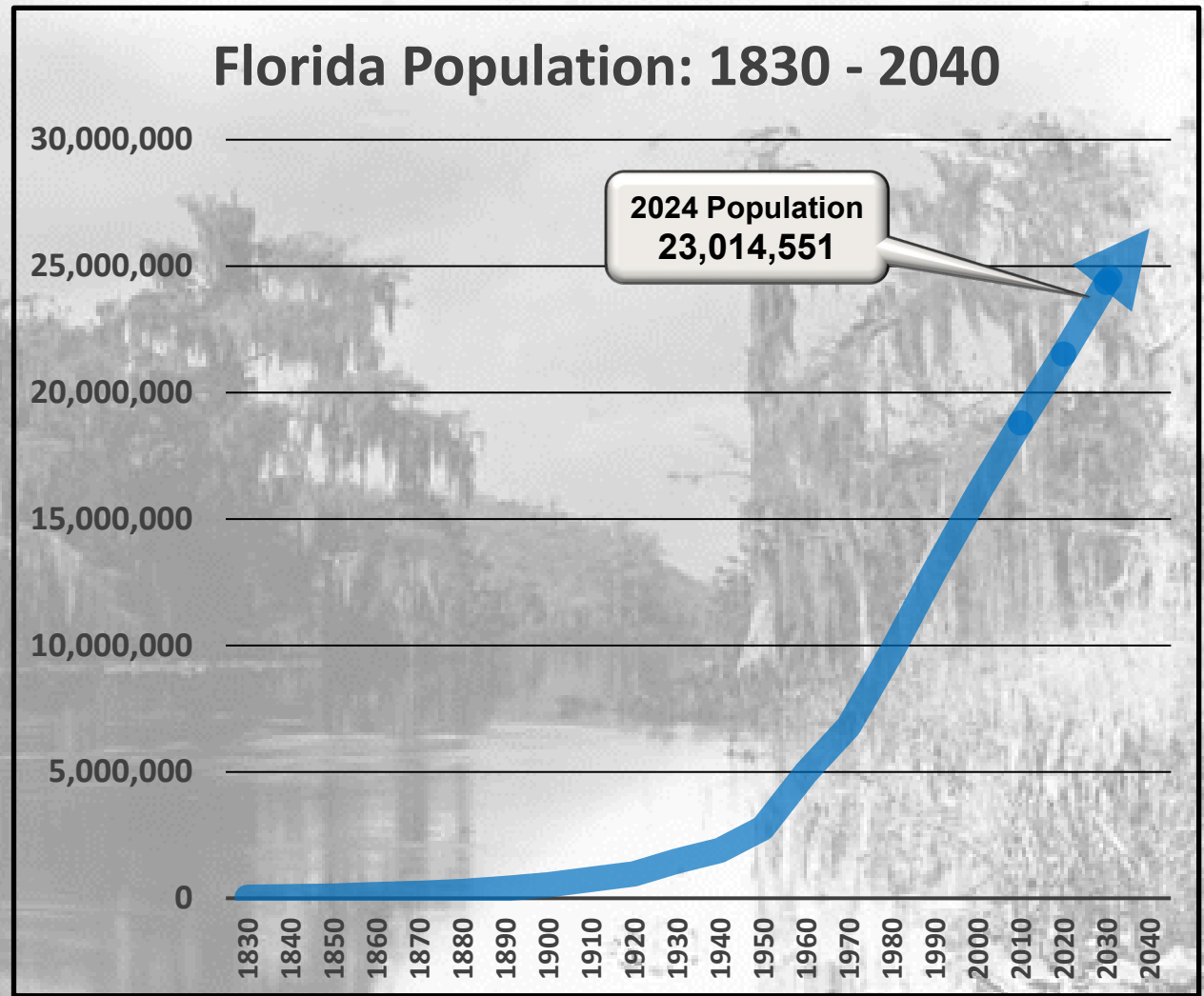
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Florida's Rapid Population Growth

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.”

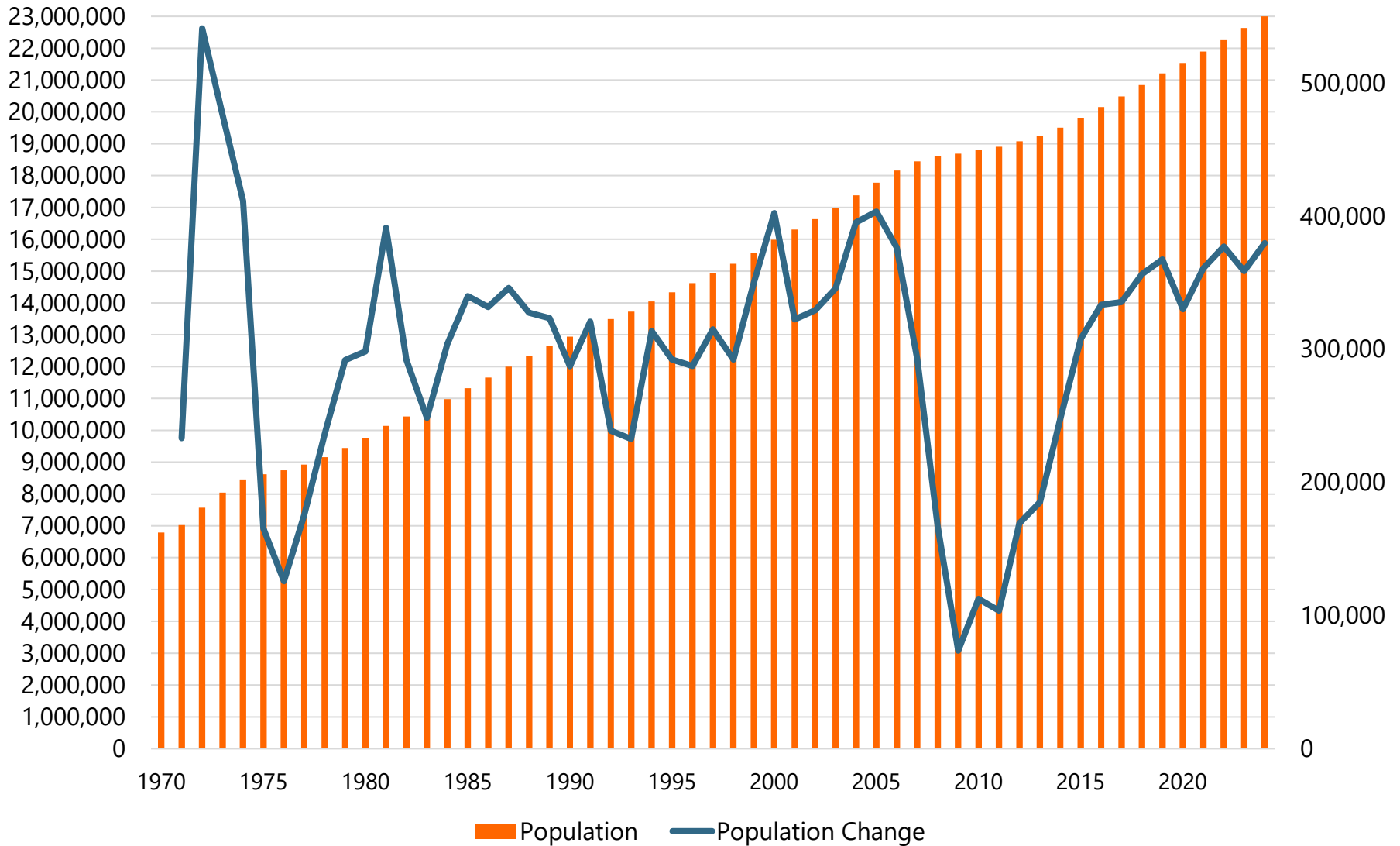


Florida's Rapid Population Growth

- Growth has picked up where it left off before the Great Recession
- 2024 Population: **23,014,551**
- 2020-2024:
370,000/year or **1,000/day**
(~Ft. Lauderdale x 2)
- 2024-2030:
280,000/year or **770/day**
(> St. Petersburg)



Florida Population and Population Change, 1970–2024



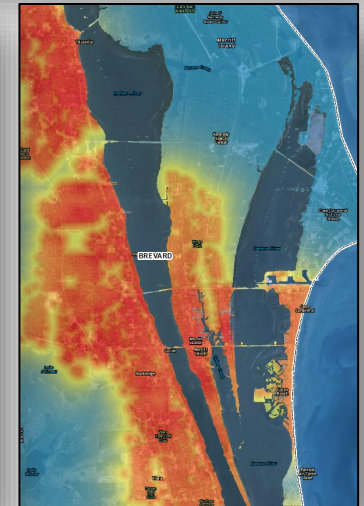
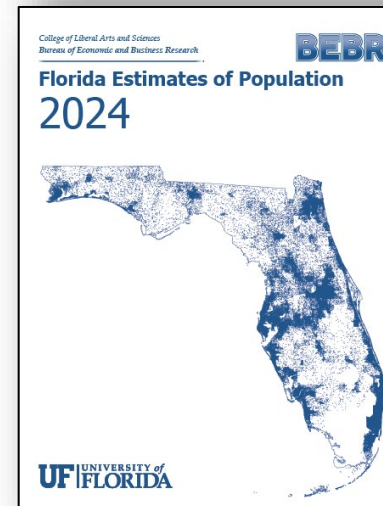
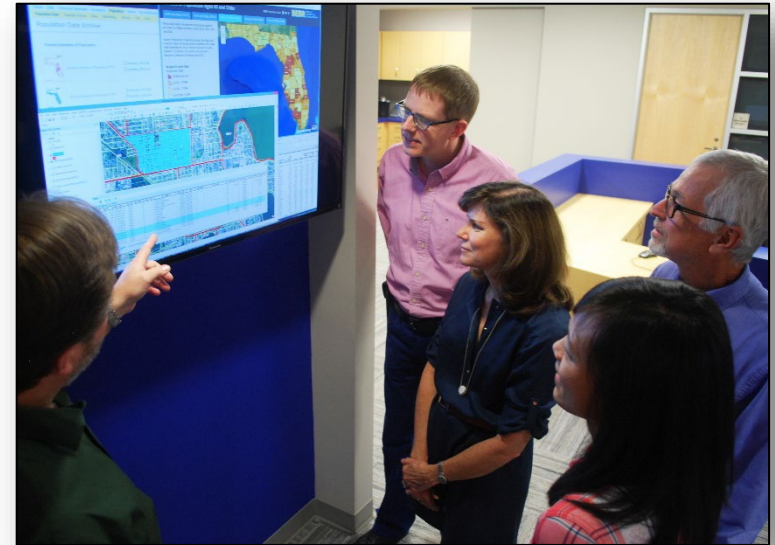
The Bureau of Economic and Business Research (BEBR)

- University of Florida **applied research center** founded in 1930
- **Faculty** and **professional staff** conduct research assisted by **student employees**
- Conducts **economic, demographic, survey, and social network research** that will inform public policy and business decision making
- Produces official **population estimates & projections** for Florida
- Conducts Monthly Statewide **Consumer Attitude Surveys**



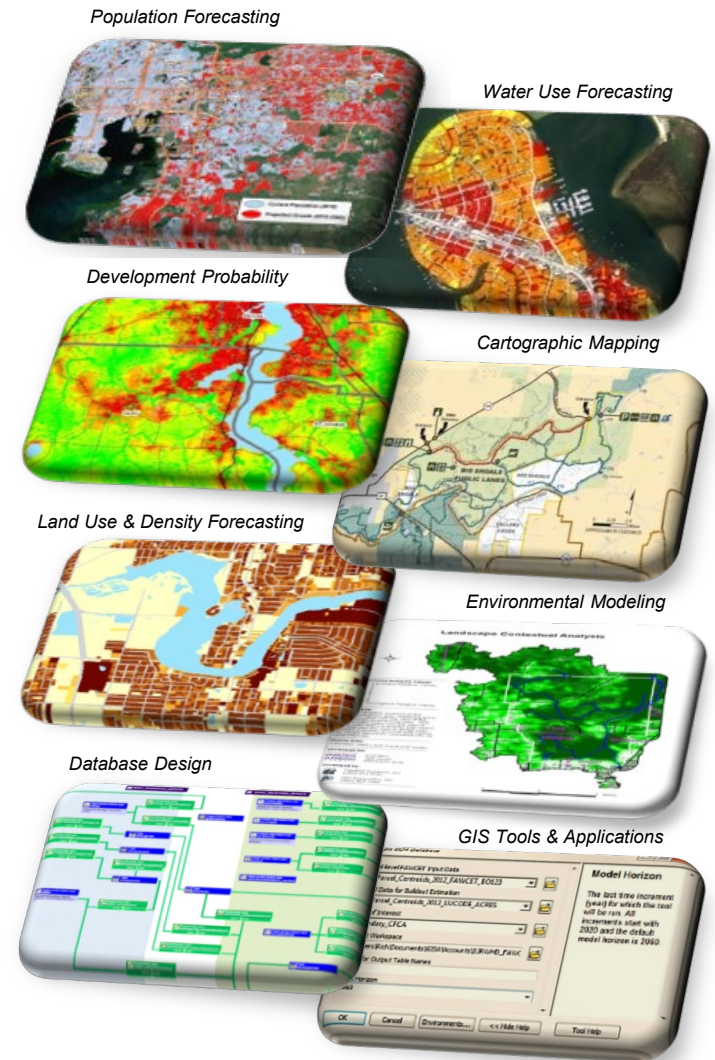
BEBR's Population Studies Program

- Team of research demographers, planners, and GIS/data analysts
- Produces Florida's official city, county and state population **estimates** and **projections** since the 1970s
- Produces Florida's official population **projections** by age, sex, race and Hispanic origin
- Conducts **demographic research**
- Provides **geospatial mapping and modeling**, including forecasts of population and water demand for small geographies



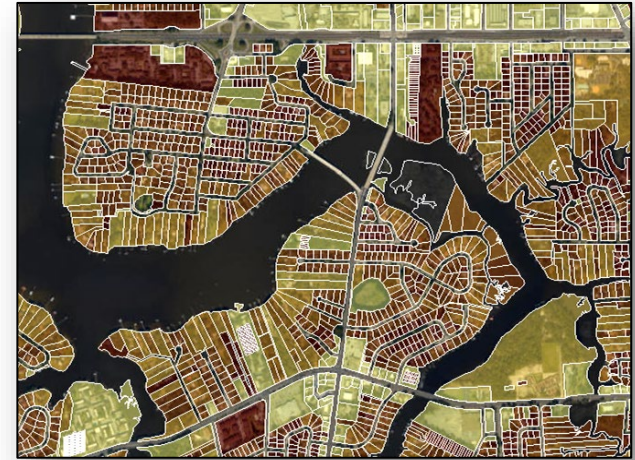
Rich Doty Introduction

- GIS Coordinator / Research Demographer at BEBR
- Degrees in Economics & Planning
- 30 years of consulting experience
- Develops the official population estimates for the State of Florida
- Subject matter expert in population and water demand forecasting

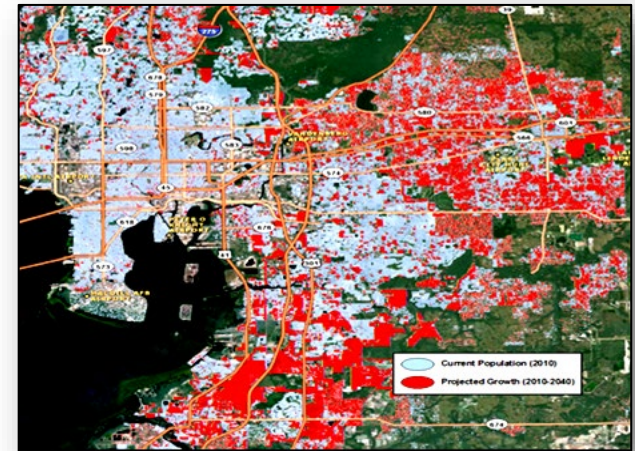


Small-area Estimates & Projections

- Geospatial models
 - Granular level (property parcels)
 - Comprehensive build-out analysis
 - Land use & development plans
 - Tract-level growth trends
- 30-year projections in 5-year increments (typically)
- Available for any boundaries (city, zip code, service area, utility, etc.)
- Consistent with BEBR forecasts

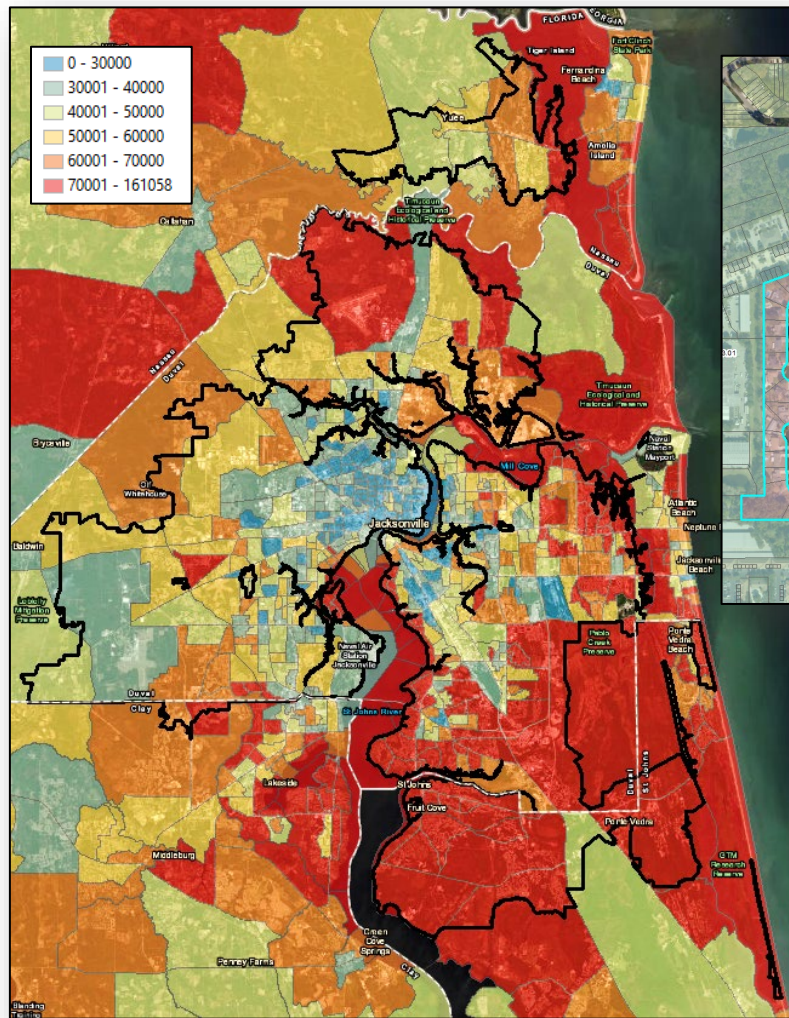


Build-out Density in Jacksonville



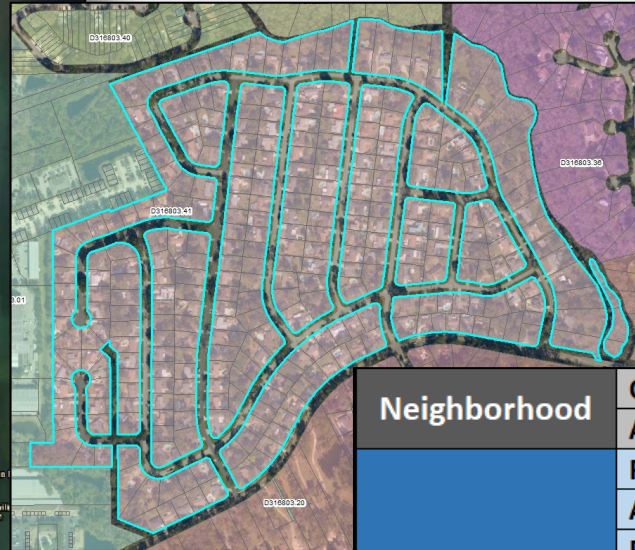
Projected Population Growth in Tampa

Geospatial Data Analysis Using Population Data



Average Household Income

Jacksonville Neighborhood



Neighborhood	Code	D316803.41
	Acres	92.3
Single Family Residential Average Values	Parcel Count	304
	Acres	92.3
	Pct Neighborhood Acres	100%
	Units	304
	Bathrooms	2.1
	Bedrooms	3.1
	Percentage with Pools	32%
	Heated Square Footage	1,665
	Just Value	\$ 171,177
	Building Value	\$ 112,551
Average Year Built	1977	
Effective Year Built	1978	
Household Income	\$ 102,663	

Neighborhood Average Metrics

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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

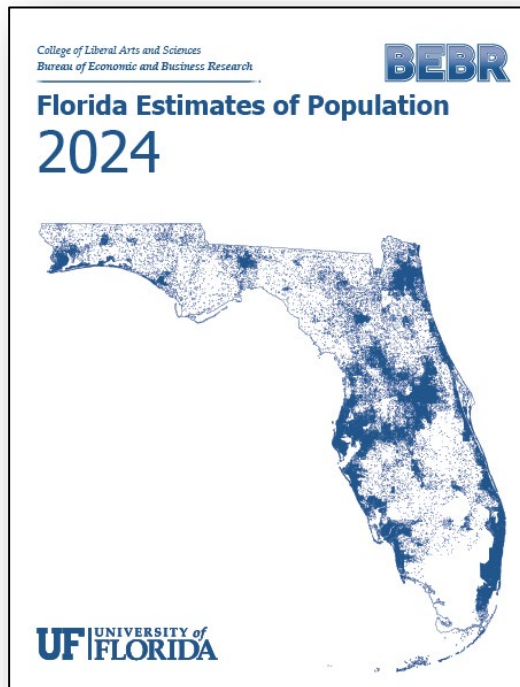
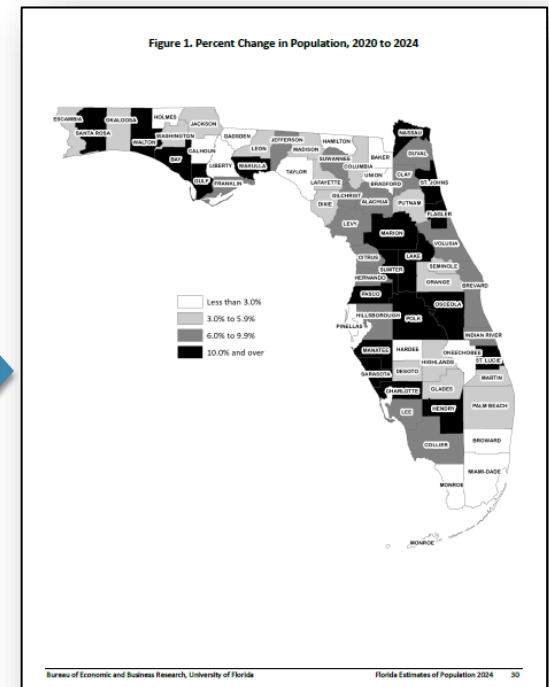


Table 7. Rank of Florida Counties by Percent Change in Population, 2020 to 2024

Rank	State and County	Percent Change	Population 2024	Population 2020	Rank	State and County	Percent Change	Population 2024	Population 2020
FLORIDA									
1	St. Johns	21.2	331,479	273,423	35	Alachua	6.4	296,212	278,468
2	Sumter	20.8	156,743	129,732	36	Orange	5.7	1,511,568	1,429,908
3	Gulf	19.4	16,947	14,192	37	Glades	5.7	12,815	12,126
4	Flagler	18.1	136,310	115,378	38	Washington	4.9	26,568	25,318
5	St. Lucie	17.2	385,746	329,226	39	Highlands	4.8	106,109	101,230
6	Walton	16.5	87,728	75,305	40	Okechobee	4.8	221,806	211,648
7	Osceola	16.1	451,231	388,656	41	Seminole	4.8	493,282	470,856
8	Nassau	15.1	103,990	90,352	42	Dixie	4.7	17,555	16,799
9	Hendry	14.6	45,413	39,619	43	Escambia	4.5	336,358	321,905
10	Franklin	13.9	826,090	725,046	44	DeSoto	4.4	35,487	33,976
11	Manatee	13.9	455,356	399,710	45	Jackson	4.3	49,345	47,319
12	Leake	12.9	433,331	383,956	46	Martin	4.1	164,853	152,431
13	Charlotte	12.7	210,545	186,247	47	Putnam	3.8	76,130	73,321
14	Pasco	12.7	633,029	561,891	48	Madison	3.8	18,649	17,968
15	Bay	11.9	196,112	175,216	49	Palm Beach	3.6	1,545,905	1,492,191
16	Marion	11.6	419,510	375,908	50	Columbia	3.5	72,155	69,696
17	Santa Rosa	10.6	207,983	188,000	51	Leon	3.4	302,197	292,198
18	Wakulla	10.5	37,313	33,764	52	Lafayette	3.4	8,504	8,226
19	Sarasota	10.4	479,027	434,006	53	Miami-Dade	2.7	2,774,841	2,701,767
20	Gilchrist	9.2	19,503	17,864	54	Geosden	2.3	44,823	43,826
21	Lee	8.7	827,016	760,822	55	Baker	2.3	28,899	28,259
22	Collier	8.7	408,381	375,732	56	Herdece	2.2	25,883	25,327
23	Clay	8.3	236,365	218,245	57	Holmes	2.1	20,059	19,653
24	Hernando	8.3	210,577	194,515	58	Broward	1.9	1,981,888	1,944,375
25	Citrus	8.0	166,151	153,843	59	Hamilton	1.6	14,228	14,004
26	Jefferson	8.0	15,667	14,510	60	Monroe	1.5	84,147	82,874
27	Brevard	7.8	653,703	606,612	61	Okeechobee	1.5	40,230	39,644
28	Volusia	7.4	394,643	359,543	62	Pinellas	1.3	971,218	959,107
29	Indian	7.0	173,029	159,788	63	Liberty	0.5	8,016	7,974
30	Suwannee	7.0	46,519	43,474	64	Calhoun	0.4	13,700	13,648
31	Franklin	7.0	13,321	12,451	65	Taylor	0.0	21,802	21,796
32	Hillsborough	6.9	1,560,449	1,459,762	66	Union	-0.3	16,100	16,147
33	Levy	6.8	49,843	42,923	67	Bradford	-3.4	27,335	28,303



BEBR Population Estimates

- Permanent (“Usual”) residents only – not seasonal or tourists
- Housing unit method
 - Changes in population based on changes in occupied housing units (or households)
 - Most common method for local estimates
- Estimate occupancy and persons per household (PPH) to determine population in households
 - 2020 Census values
 - In some places, we make minor adjustments based on statistically significant trends in American Community Survey (ACS) data or the mix of single family and multi-family building permits
- Add population in group quarters
 - Prisons, dormitories, and military housing are surveyed annually
 - Population in smaller GQs are increased in proportion to household population

BEBR Population Estimation Methodology

- Estimate changes in occupied housing units (households) using varying combinations of:
 - Active residential electrical meters
 - Active residential electrical meters above minimum use threshold
 - Residential building permits & certificates of occupancy
 - Homestead exemptions
 - Property parcel data

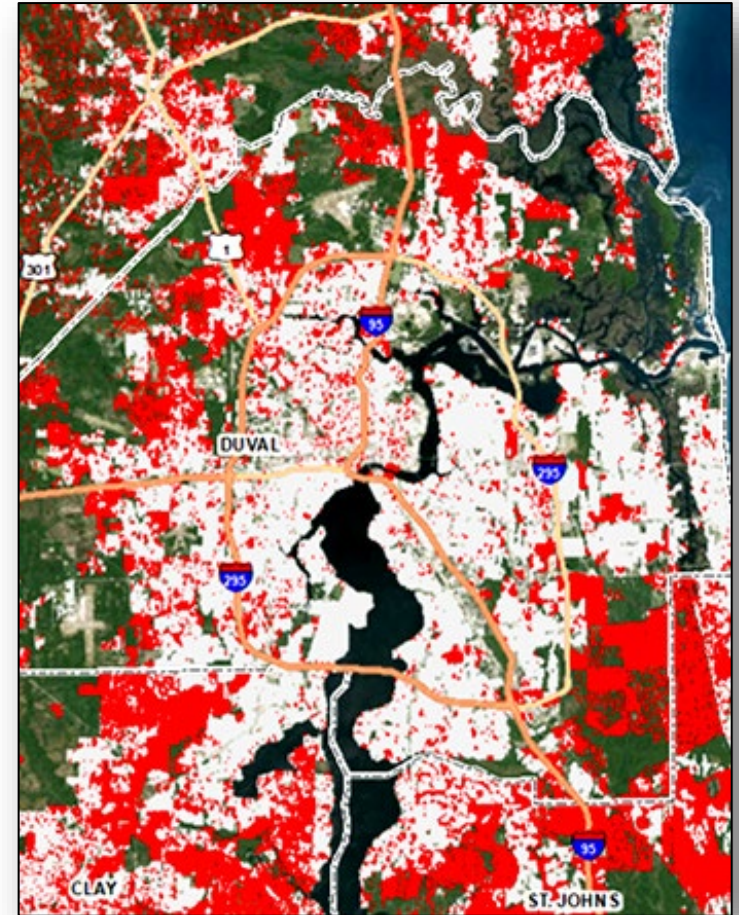


Florida's Top Cities by Population Size

City	Population			Rank			Percent Change	
	2024	2020	2010	2024	2020	2010	2020 to 2024	2010 to 2020
Jacksonville	1,016,103	949,611	821,784	1	1	1	7.0	15.6
Miami	467,171	442,241	399,508	2	2	2	5.6	10.7
Tampa	409,458	384,959	335,709	3	3	3	6.4	14.7
Orlando	335,066	307,573	238,300	4	4	5	8.9	29.1
St. Petersburg	267,031	258,308	244,769	5	5	4	3.4	5.5
Port St. Lucie	253,959	204,851	164,603	6	7	9	24.0	24.5
Hialeah	230,575	223,109	224,667	7	6	6	3.3	-0.7
Cape Coral	220,236	194,016	154,305	8	9	10	13.5	25.7
Tallahassee	202,203	196,169	181,376	9	8	7	3.1	8.2
Fort Lauderdale	189,583	182,760	165,521	10	10	8	3.7	10.4
Pembroke Pines	170,892	171,178	154,019	11	11	11	-0.2	11.1
Hollywood	155,038	153,067	140,768	12	12	12	1.3	8.7
Gainesville	150,120	141,085	124,476	13	13	13	6.4	13.3
Palm Bay	140,199	119,760	103,190	14	16	18	17.1	16.1
Miramar	139,500	134,721	122,041	15	14	14	3.5	10.4
Coral Springs	135,191	134,394	121,096	16	15	15	0.6	11.0
West Palm Beach	125,401	117,415	100,343	17	17	19	6.8	17.0
Lakeland	123,760	112,641	97,422	18	19	21	9.9	15.6
Clearwater	118,463	117,292	107,685	19	18	16	1.0	8.9
Miami Gardens	115,364	111,640	107,166	20	21	17	3.3	4.2

Florida's Top Cities by Population Growth, 2020-2024

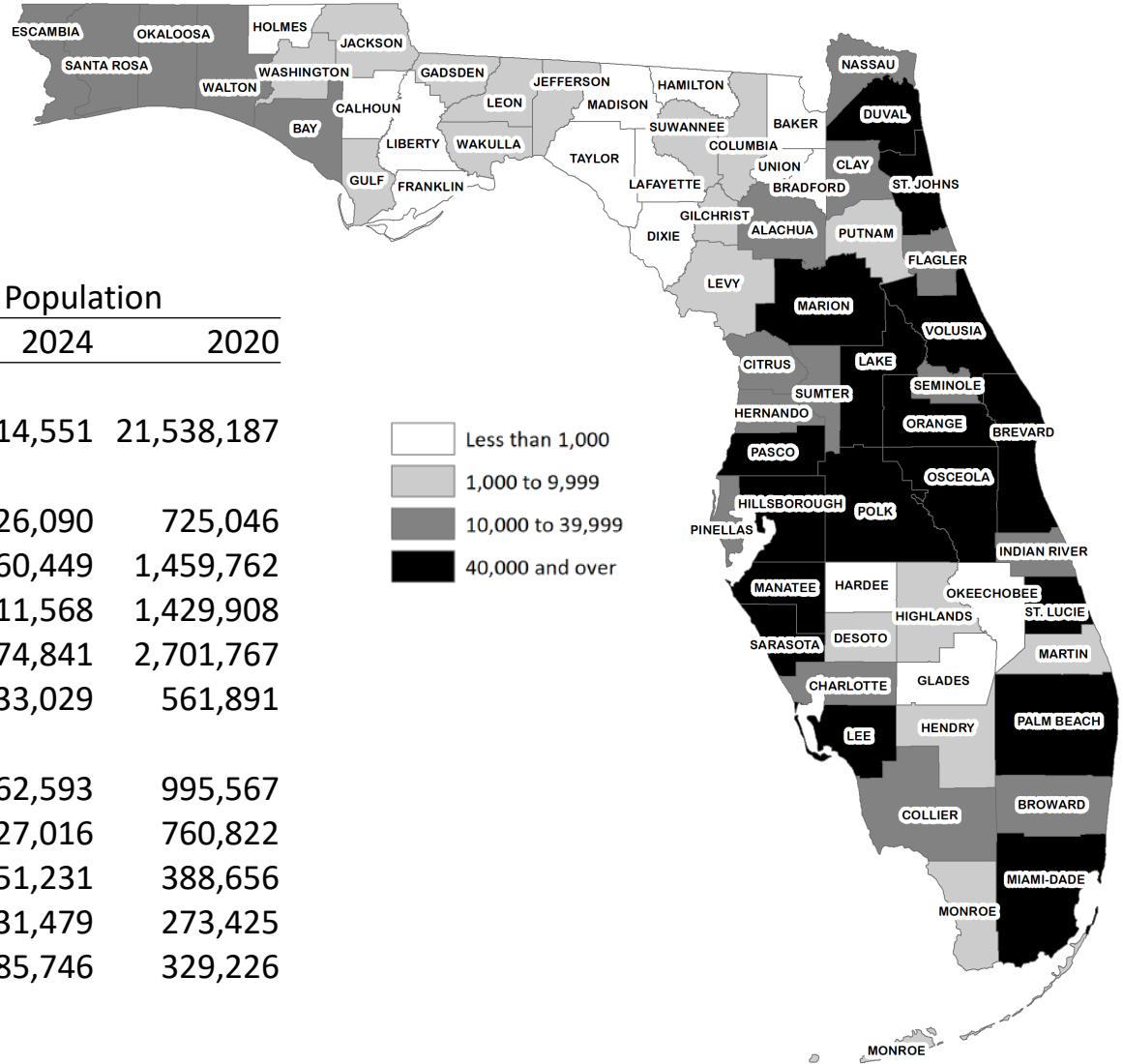
Rank	City	Change	Population	
			2024	2020
1	Jacksonville	66,492	1,016,103	949,611
2	Port St. Lucie	49,108	253,959	204,851
3	Orlando	27,493	335,066	307,573
4	Cape Coral	26,220	220,236	194,016
5	Miami	24,930	467,171	442,241
6	Tampa	24,499	409,458	384,959
7	Palm Bay	20,439	140,199	119,760
8	North Port	17,606	92,399	74,793
9	Palm Coast	16,935	106,193	89,258
10	Wildwood	15,607	31,337	15,730
11	Fort Myers	14,385	100,780	86,395
12	Daytona Beach	13,403	84,891	71,488
13	Haines City	12,845	39,514	26,669
14	Lakeland	11,119	123,760	112,641
15	Gainesville	9,035	150,120	141,085
16	St. Petersburg	8,723	267,031	258,308
17	Winter Haven	8,704	57,923	49,219
18	West Palm Beach	7,986	125,401	117,415
19	Hialeah	7,466	230,575	223,109
20	St. Cloud	7,010	65,974	58,964



Florida's Top Counties by Population Size

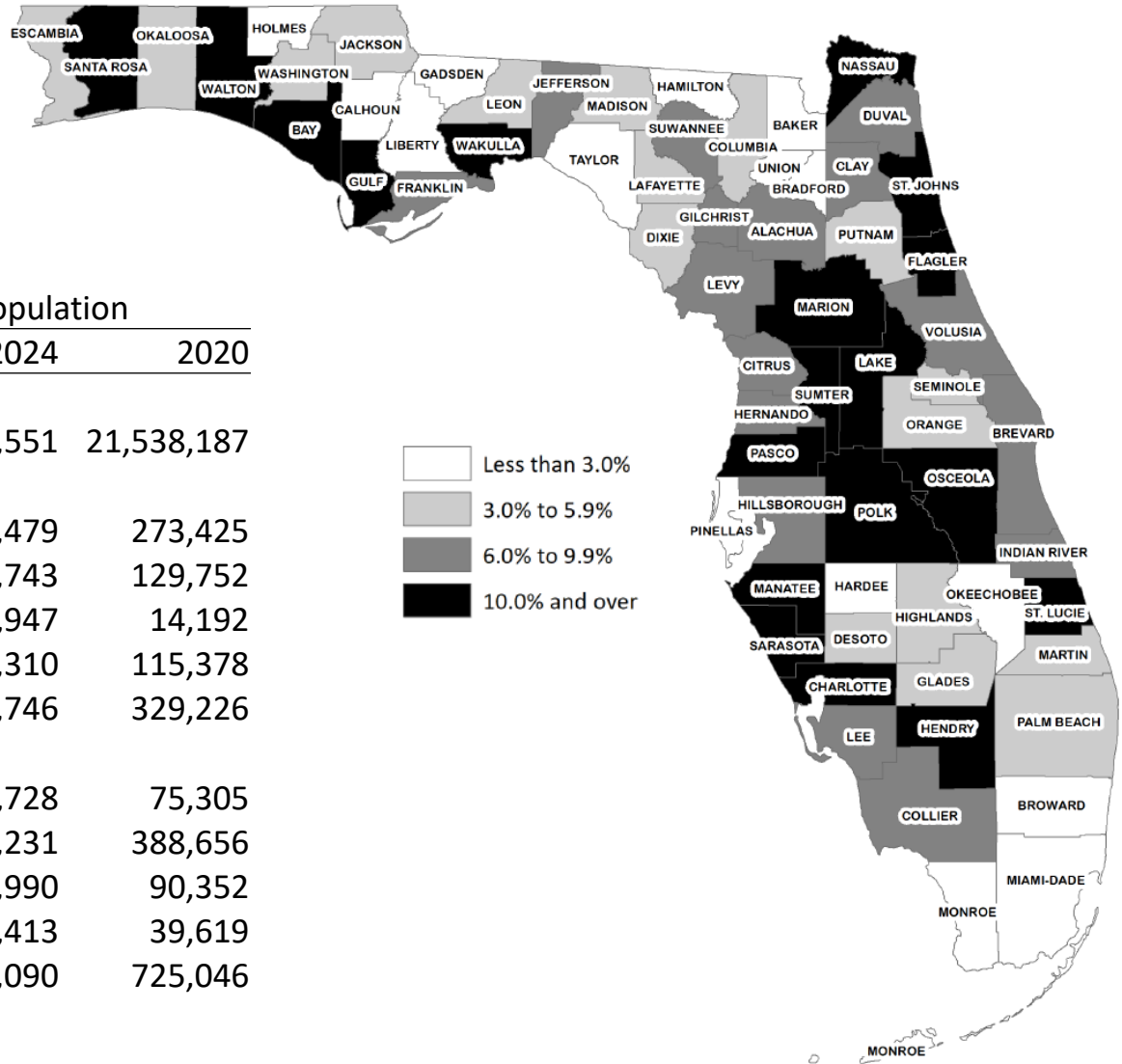
Rank	State and County	Population				Percent of State Population			
		2024	2020	2010	2000	2024	2020	2010	2000
	FLORIDA	23,014,551	21,538,187	18,801,332	15,982,824	100.00	100.00	100.00	100.00
1	Miami-Dade	2,774,841	2,701,767	2,496,457	2,253,779	12.06	12.54	13.28	14.10
2	Broward	1,981,888	1,944,375	1,748,066	1,623,018	8.61	9.03	9.30	10.15
3	Hillsborough	1,560,449	1,459,762	1,229,226	998,948	6.78	6.78	6.54	6.25
4	Palm Beach	1,545,905	1,492,191	1,320,134	1,131,191	6.72	6.93	7.02	7.08
5	Orange	1,511,568	1,429,908	1,145,956	896,344	6.57	6.64	6.10	5.61
6	Duval	1,062,593	995,567	864,263	778,879	4.62	4.62	4.60	4.87
7	Pinellas	971,218	959,107	916,542	921,495	4.22	4.45	4.87	5.77
8	Lee	827,016	760,822	618,754	440,888	3.59	3.53	3.29	2.76
9	Polk	826,090	725,046	602,095	483,924	3.59	3.37	3.20	3.03
10	Brevard	653,703	606,612	543,376	476,230	2.84	2.82	2.89	2.98
11	Pasco	633,029	561,891	464,697	344,768	2.75	2.61	2.47	2.16
12	Volusia	594,643	553,543	494,593	443,343	2.58	2.57	2.63	2.77
13	Seminole	493,282	470,856	422,718	365,199	2.14	2.19	2.25	2.28
14	Sarasota	479,027	434,006	379,448	325,961	2.08	2.02	2.02	2.04
15	Manatee	455,356	399,710	322,833	264,002	1.98	1.86	1.72	1.65

Florida's Top Counties by Numeric Growth, 2020-2024



Rank	State and County	Change	Population	
			2024	2020
	FLORIDA	1,476,364	23,014,551	21,538,187
1	Polk	101,044	826,090	725,046
2	Hillsborough	100,687	1,560,449	1,459,762
3	Orange	81,660	1,511,568	1,429,908
4	Miami-Dade	73,074	2,774,841	2,701,767
5	Pasco	71,138	633,029	561,891
6	Duval	67,026	1,062,593	995,567
7	Lee	66,194	827,016	760,822
8	Osceola	62,575	451,231	388,656
9	St. Johns	58,054	331,479	273,425
10	St. Lucie	56,520	385,746	329,226

Florida's Top Counties by Percent Growth, 2020-2024



Rank	State and County	Percent Change	Population	
			2024	2020
	FLORIDA	6.9	23,014,551	21,538,187
1	St. Johns	21.2	331,479	273,425
2	Sumter	20.8	156,743	129,752
3	Gulf	19.4	16,947	14,192
4	Flagler	18.1	136,310	115,378
5	St. Lucie	17.2	385,746	329,226
6	Walton	16.5	87,728	75,305
7	Osceola	16.1	451,231	388,656
8	Nassau	15.1	103,990	90,352
9	Hendry	14.6	45,413	39,619
10	Polk	13.9	826,090	725,046

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BEBR State Population Projection Model

- **Component-component model** by single-year of age and sex.
- **Vital Statistics:** Fertility and mortality rates from Florida DOH data.
- **Domestic Migration:** In- and out-migration rates, calculated as average of recent 1-year and 5-year ACS PUMS estimates.
- **Foreign Migration:** In- and out-migration levels, calculated as average of recent 1-year and 5-year ACS PUMS estimates. Out-migration is assumed to equal 25% of in-migration from abroad.
- Model starts in 2020 (population total equals Census 2020 Florida count).
- Estimates (currently 2021–24) match BEBR estimates.
- Short-term projections (currently 2025–2029) match the latest Demographic Estimating Conference (DEC) short-term forecasts.
- Long-term projections for 2030 and beyond have no controls.

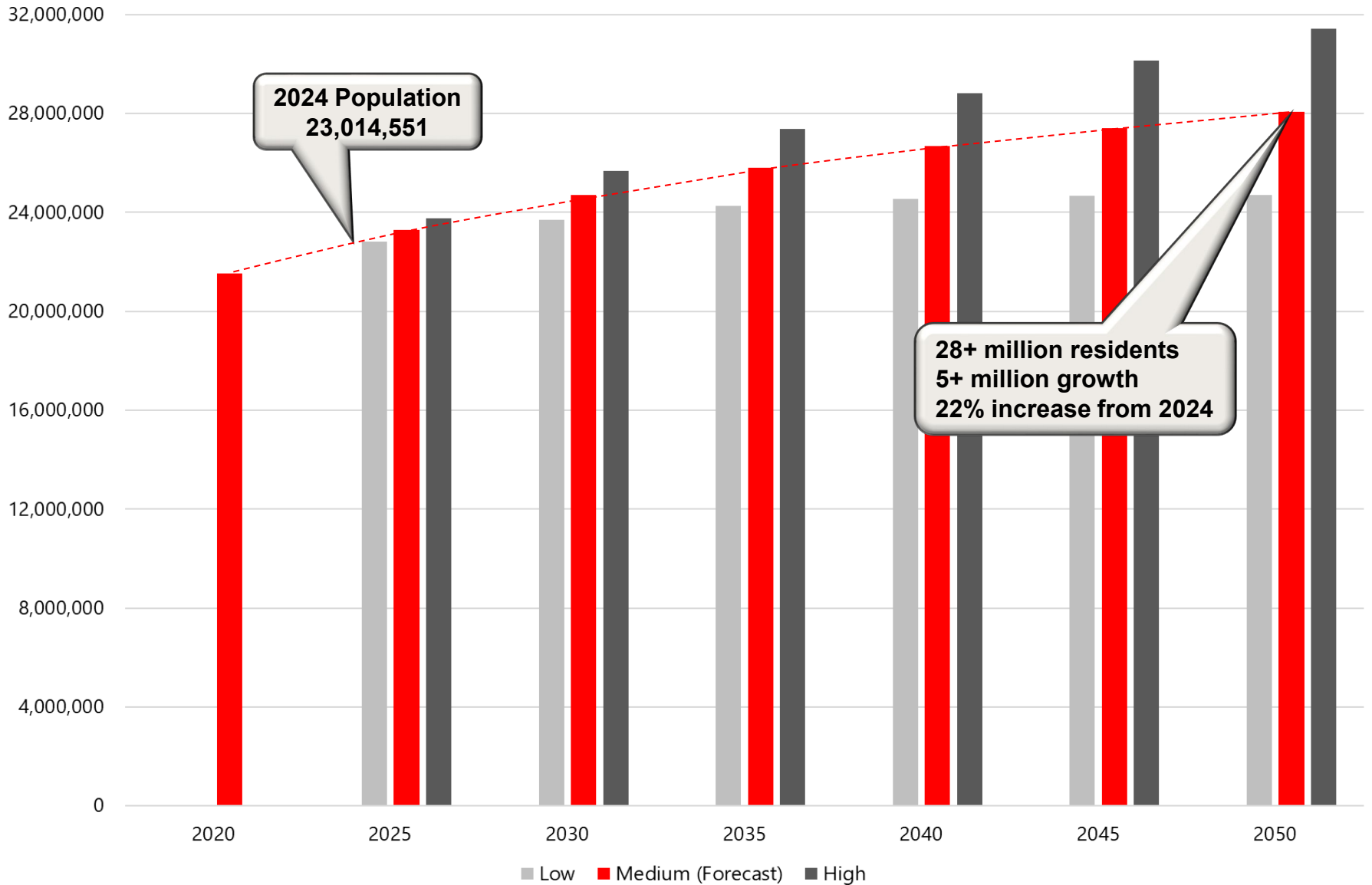
Latest BEBR State Projections (January 2024)

	Estimates	Projections, April 1					
	April 1, 2023	2025	2030	2035	2040	2045	2050
FLORIDA	22,634,867						
Low		22,826,400	23,710,600	24,266,100	24,547,500	24,668,400	24,697,200
Medium		23,292,200	24,698,500	25,815,000	26,682,000	27,409,400	28,065,000
High		23,758,000	25,686,500	27,363,900	28,816,600	30,150,300	31,432,800

- 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.

Source: BEBR, Florida Population Studies, Bulletin 198, January 2024.

Florida Population Counts and Projections, 2020–2050



BEBR County Population Projection Model (Total Population)

Ten Trend Extrapolation & Share Methods and Base Periods:

- Linear: 10 and 20 Years (2014–24 and 2004–2024)
- Share-of-Growth: 2, 10, and 20 Years (2022–24, 2014–24, and 2004–2024)
- Shift-Share: 5 and 15 Years (2019–24 and 2009–24)
- Exponential: 15 Years (2009–24)
- Constant-Share: Held at latest share (2024)
- Constant: Held at latest estimate (2024)

Extrapolations are performed on the non-institutional population; institutional populations are projected separately.

We sometimes revise the methods and historical periods used

BEBR County Population Projection Model (Total Population)

This methodology resulted in ten different projections for each county for each projection year (2025, 2030, 2035, 2040, 2045, and 2050). We evaluated 4 averages:

- Ave-10: All 10 individual projections
- Ave-8: Excluding the highest and lowest projections
- Ave-6: Excluding the two highest and two lowest projections
- Ave-4: Excluding the three highest and three lowest projections

Ave-4 is the default projection. We evaluate the resulting projections by comparing them with historical population trends and with the level of population growth projected for the state. We may select another average, an individual technique, or calculate a custom average that fit our evaluation criteria.

BEBR Low and High Projections

- Provide an indication of the uncertainty surrounding the medium projections – our forecast.
- Based on analyses of past population forecast errors for counties in Florida, broken down by population size and growth rate.
- Indicate the range into which approximately three-quarters of future county populations will fall, if the future distribution of forecast errors is similar to the past distribution.
- Low and high projections **do not** represent low and high growth scenarios.

County and State	Estimates April 1, 2023	Projections, April 1					
		2025	2030	2035	2040	2045	2050
ALACHUA	293,040						
Low		282,700	285,300	284,000	280,000	274,800	269,300
Medium		300,800	317,000	329,300	338,400	345,600	352,000
High		318,800	348,700	374,600	396,800	416,500	434,700
BAKER	28,339						
Low		26,900	26,700	26,400	25,800	25,200	24,500
Medium		28,900	30,200	31,300	32,200	32,900	33,600
High		31,000	33,700	36,200	38,500	40,700	42,700
BAY	187,545						
Low		179,600	178,800	176,900	174,100	171,000	167,800
Medium		191,000	198,600	205,100	210,400	215,100	219,400
High		202,500	218,500	233,300	246,700	259,200	270,900
BRADFORD	27,389						
Low		26,000	25,400	24,700	23,900	23,200	22,600
Medium		27,700	28,200	28,600	28,900	29,200	29,500
High		29,300	31,100	32,500	33,900	35,200	36,400
BREVARD	640,773						
Low		618,800	625,100	625,000	619,200	610,400	600,100
Medium		658,300	694,600	724,600	748,300	767,700	784,500
High		697,700	764,100	824,300	877,400	925,100	968,800
BROWARD	1,973,579						
Low		1,906,400	1,899,700	1,876,000	1,842,400	1,806,200	1,771,100
Medium		2,006,700	2,076,200	2,125,800	2,161,100	2,189,300	2,213,800
High		2,107,000	2,252,700	2,375,600	2,479,900	2,572,400	2,656,600
CALHOUN	13,816						
Low		13,000	12,500	12,000	11,500	11,100	10,700
Medium		13,800	13,900	13,900	13,900	13,900	14,000
High		14,700	15,300	15,800	16,300	16,800	17,200
CHARLOTTE	204,126						
Low		198,700	204,200	207,000	207,900	208,000	206,900
Medium		211,300	226,900	240,000	251,300	261,600	270,500
High		224,000	249,600	273,000	294,600	315,300	334,000
CITRUS	162,240						
Low		156,400	157,800	157,300	155,400	152,900	150,400
Medium		166,400	175,400	182,400	187,800	192,300	196,500
High		176,400	192,900	207,500	220,200	231,800	242,700
CLAY	231,042						
Low		224,200	229,100	231,000	229,200	225,900	222,300
Medium		238,500	254,500	267,900	276,900	284,200	290,600
High		252,800	280,000	304,700	324,700	342,400	358,900

Source: BEBR, Florida Population Studies, Bulletin 198, January 2024.

BEBR Projected 2023-2050 County Growth Rankings

RANK	COUNTY	NUMERIC CHANGE, 2023-2050
1	ORANGE	440,649
2	HILLSBOROUGH	421,869
3	MIAMI-DADE	358,246
4	POLK	305,784
5	LEE	274,111
6	PALM BEACH	268,382
7	OSCEOLA	255,775
8	BROWARD	240,221
9	DUVAL	240,122
10	PASCO	228,757

RANK	COUNTY	PERCENT CHANGE, 2023-2050
1	SUMTER	64.9
2	ST. JOHNS	63.0
3	OSCEOLA	58.2
4	FLAGLER	50.4
5	WALTON	49.7
6	NASSAU	44.7
7	ST. LUCIE	44.0
8	LAKE	42.1
9	MANATEE	39.8
10	POLK	38.3

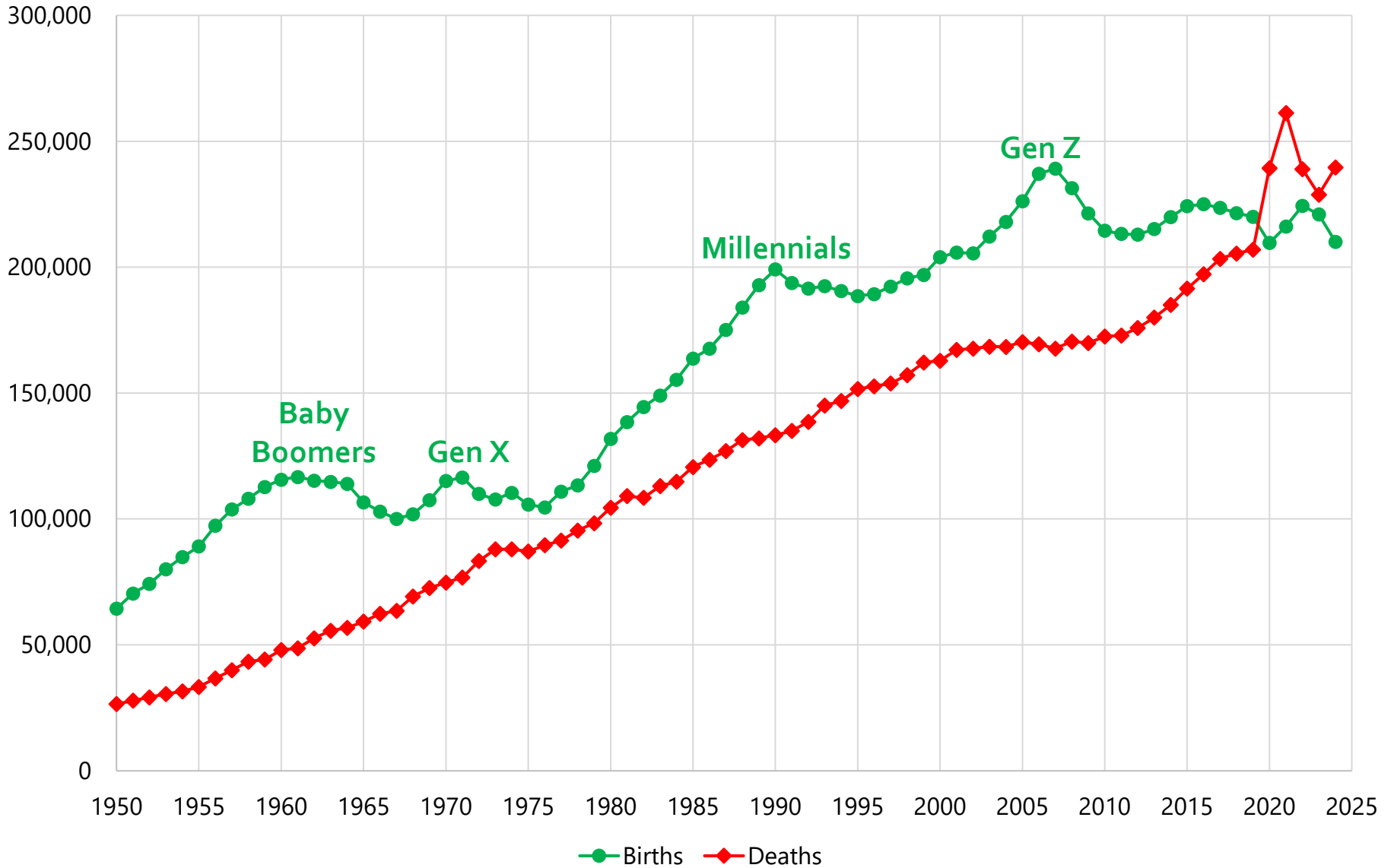
Source: BEBR, Florida Population Studies, Bulletin 198, January 2024.

Agenda

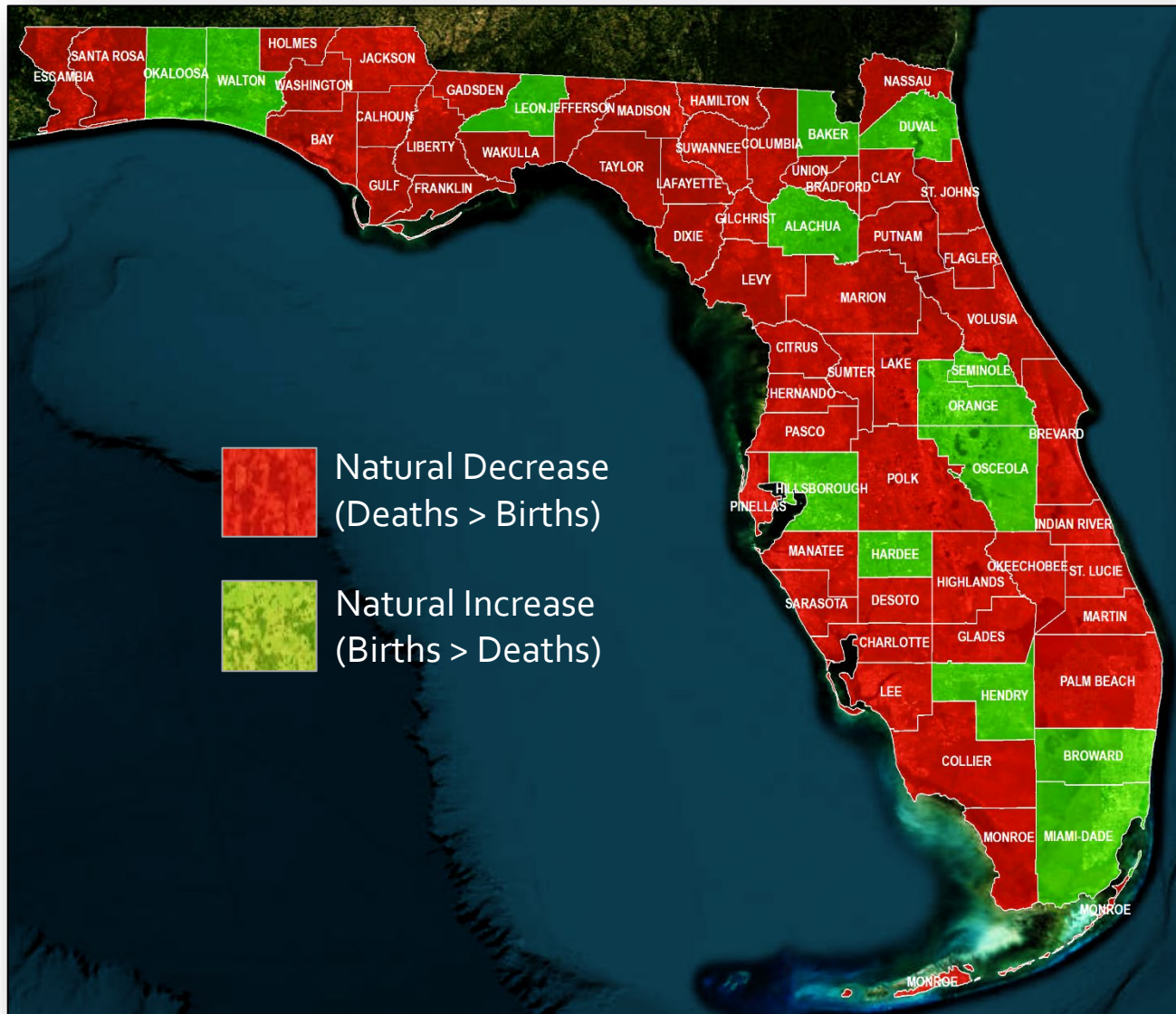
- ❖ Introduction
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- ❖ Components of Growth
- ❖ Questions & Discussion



Florida Births and Deaths, 1950–2024

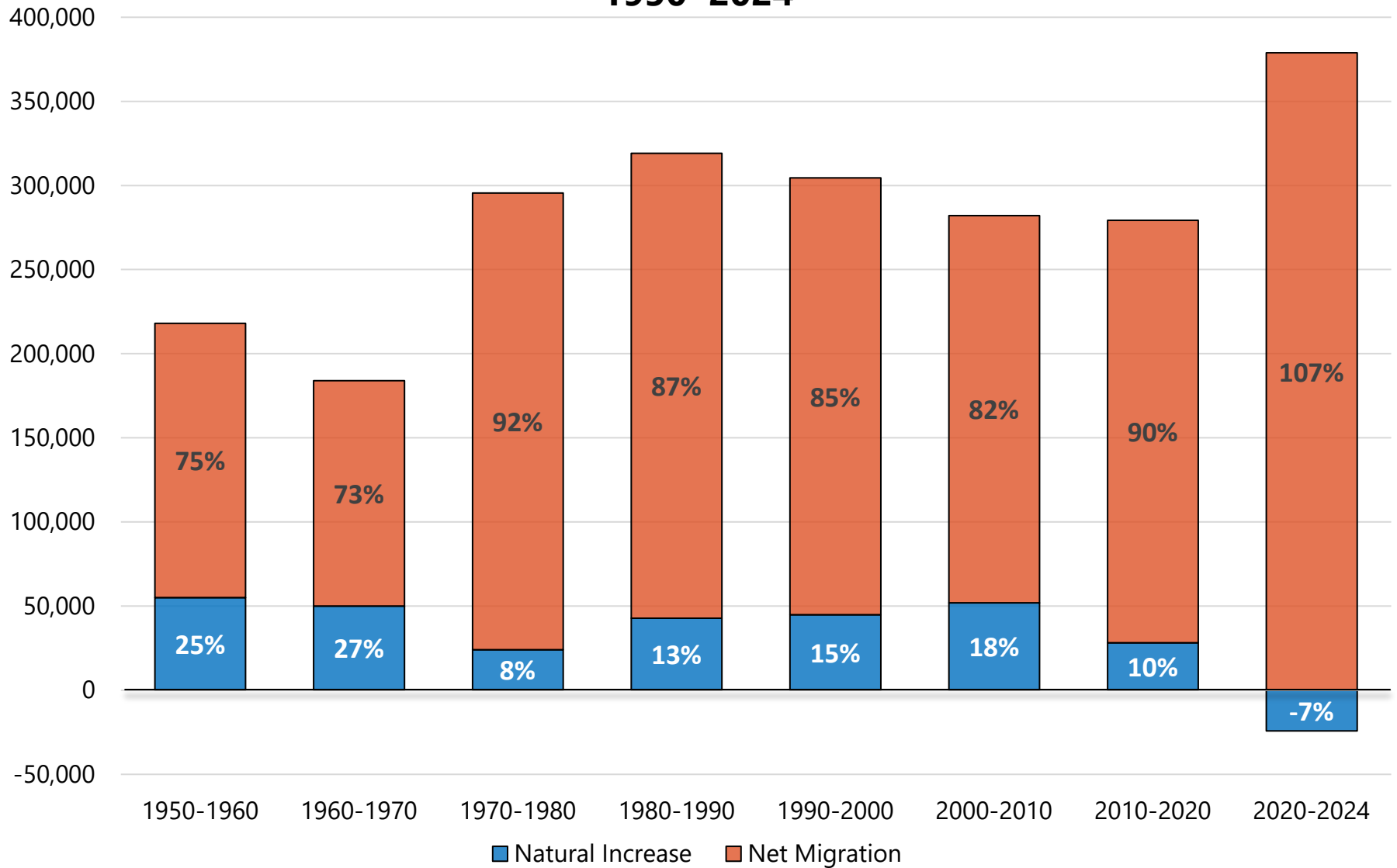


Population Natural Increase and Decrease by County, 2020-2024

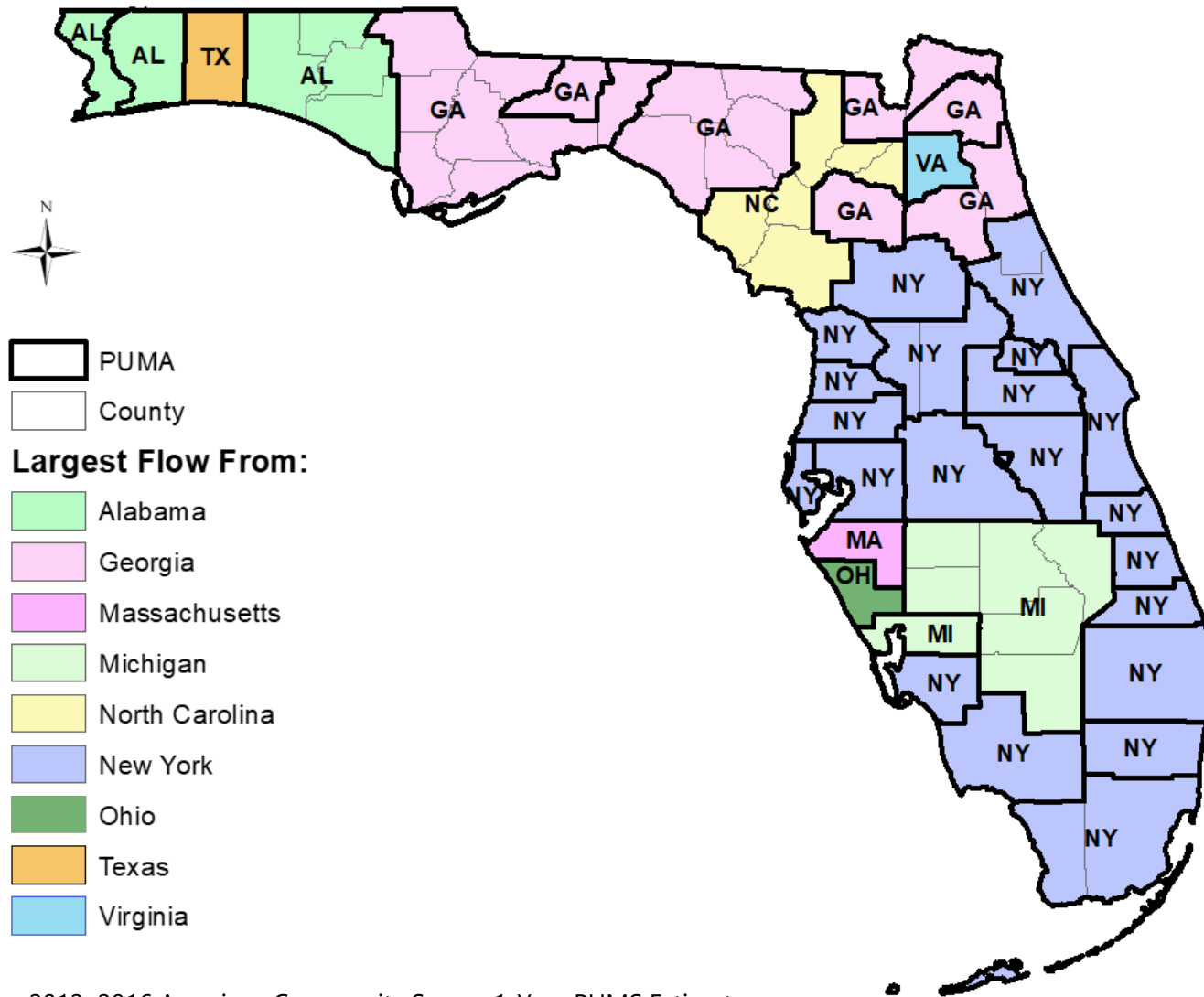


Sources: 1) Bureau of Vital Statistics, Florida Department of Health. 2) BEBR.

Average Annual Natural Increase and Net Migration in Florida, 1950–2024

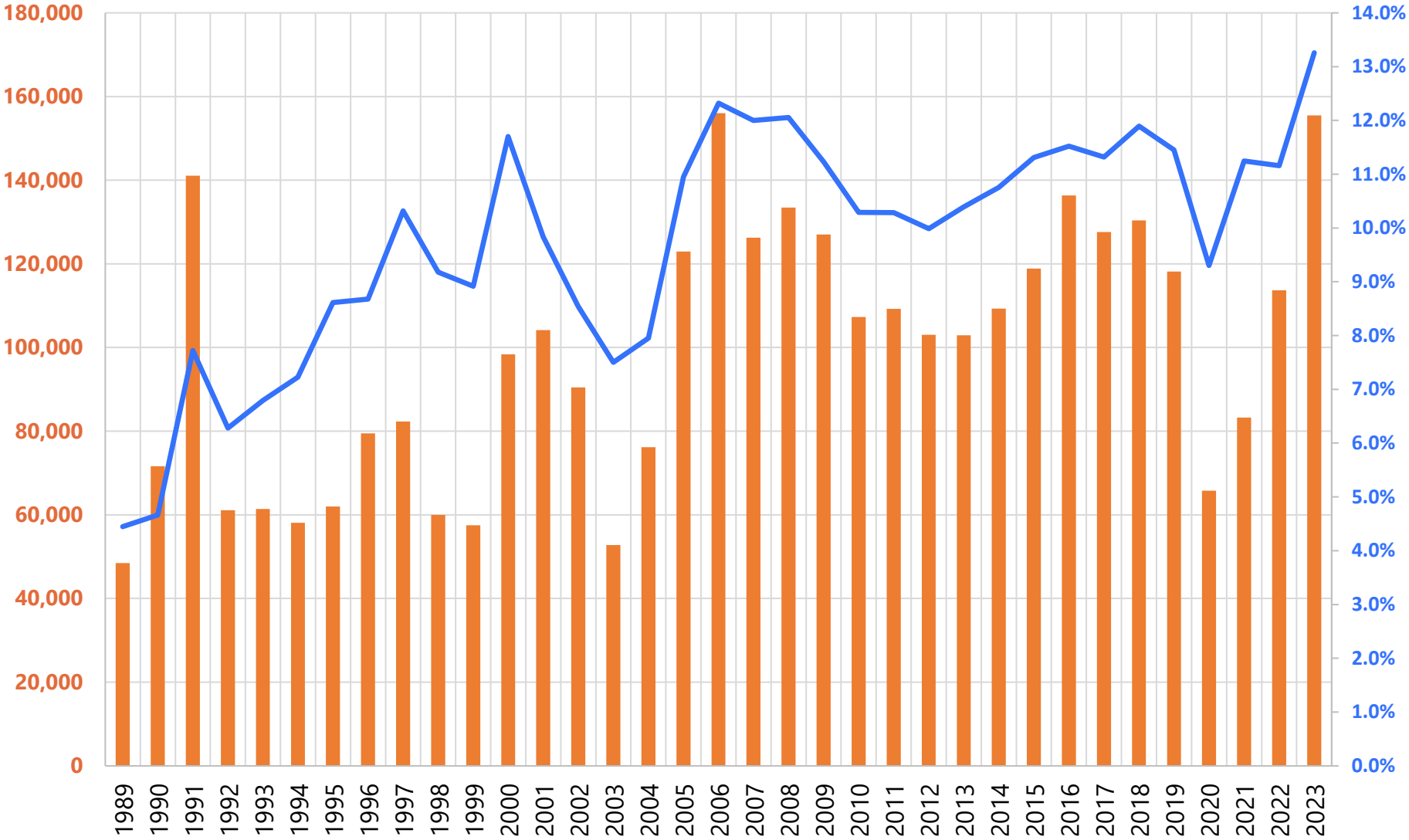


Top States for Domestic Migration Flows to Florida



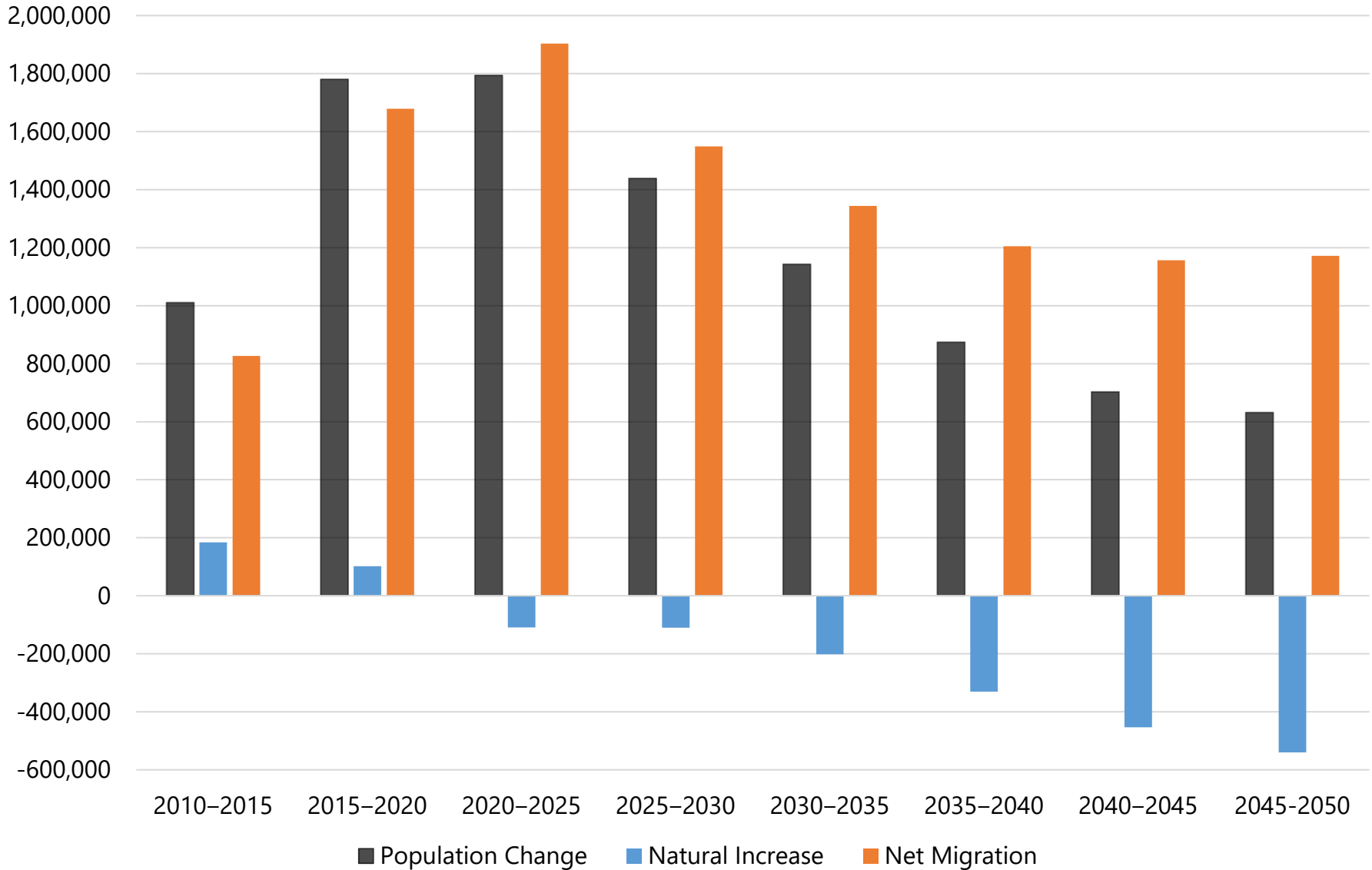
Source: 2012–2016 American Community Survey 1-Year PUMS Estimates.

Immigration to Florida, 1989–2023



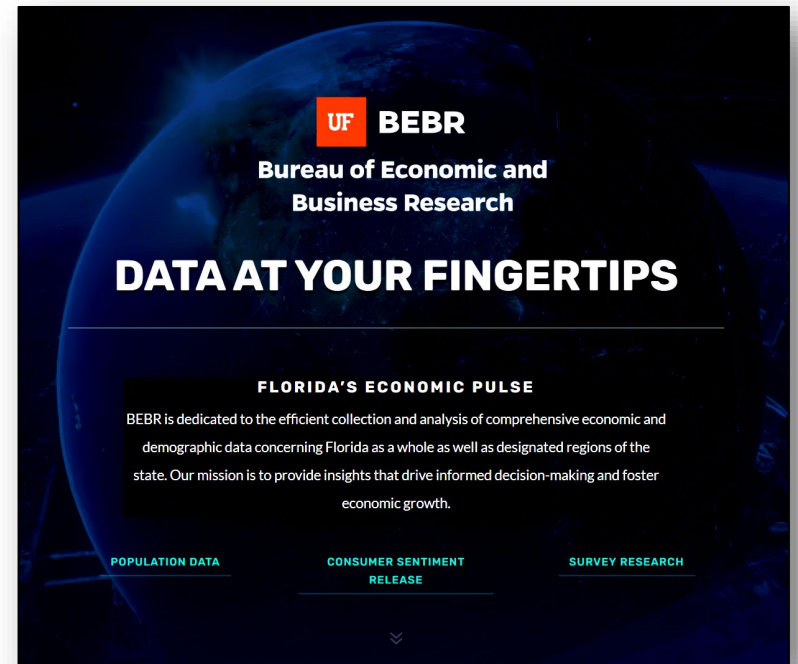
Florida Percent of US

Florida Projected Population Change, 2010–2050



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