

**2017**

# **Population Technical Bulletin**

**Martin County Board of County Commissioners**

**Prepared by the  
Growth Management Department**



Approved July 25, 2017

## Introduction

Florida Statutes, Chapter 163.3177(1)(f)3, requires local government comprehensive plans to be based on permanent and seasonal population estimates and projections. Various elements of the Martin County Growth Management Plan (CGMP), such as Future Land Use, Housing and Capital Improvements, are directly based on population data. The appropriate resident and seasonal population figures are critical to the local government in assessing future needs for services, facilities, and residential housing.

Policy 4.1D.2. of the CGMP requires the County to annually produce a population technical bulletin. The Population Technical Bulletin is based primarily on U.S. Census data and data provided by the University Of Florida Bureau Of Economic and Business Research (BEBR), for the State of Florida Office of Economic and Demographic Research (EDR) for population estimates and projections. BEBR medium permanent estimates and projections are used to generate population data for the County, the municipalities and for the unincorporated area. The data is then used for planning purposes such as projecting the future needs for housing and public facilities.

According to the U.S. Census, population estimates are “The calculated number of people living in an area as of a specified point in time, usually July 1st. The estimated population is calculated using a component of change model that incorporates information on natural increase (births, deaths) and net migration (net domestic migration, net international migration) that has occurred in an area since the latest decennial census.” When this bulletin uses that term, population estimates refer to the estimated population for the current year.

According to the U.S. Census, population projections are “Estimates of the population for future dates. They illustrate plausible courses of future population change based on assumptions about future births, deaths, net international migration, and net domestic migration.” Projected numbers are typically based on an estimated population consistent with the most recent decennial census as enumerated, projected forward using a variant of the cohort-component method. When this bulletin uses that term, population projections refer to estimates for future years.

The Population Technical Bulletin contains three sections: General Statistics for Martin County; Population Estimates and Projections Methodology, Population Estimates and Projections for Municipalities and the Unincorporated Area; and Planning Area Estimates and Projections.

## Definitions

Population categories are defined: as follows:

*Peak population (facility):* The number of permanent residents and seasonal visitors. It is calculated by adding permanent population to seasonal population (facility) to calculate the peak population for level of service planning. This definition includes tourists, migrant farmworkers, prisoners, group home residents, and other short-term and long-term visitors.

*Peak population (housing):* The number of residents living in residential housing units for more than six months of the year, and the number of occupants of residential housing who spend less than six months in Martin County equals peak population (housing). It is calculated by adding permanent population (housing) and the seasonal population (housing) to determine the total demand for residential housing units.

*Permanent population:* The number of residents living in the unincorporated area for more than six months of the year. This includes permanent residents in households as well as prisoners and group homes.

*Permanent population (housing):* The number of residents living in the unincorporated area in residential housing units for more than six months of the year.

*Persons per household (unincorporated Martin County):* The number of permanent residents living in residential housing units (classified by the Census as population in occupied housing) divided by the number of occupied housing units (provided by the US Census or BEBR in a given year) to arrive at the persons per household for unincorporated Martin County.

*Seasonal population (facility):* The number of people in the unincorporated area defined as seasonal population (housing) plus part-time inhabitants who use, or may be expected to use, public facilities or services, but are not residents. This includes tourists, migrant farmworkers, and other short-term and long-term visitors. (adapted from Section 163.3164(41) F.S.)

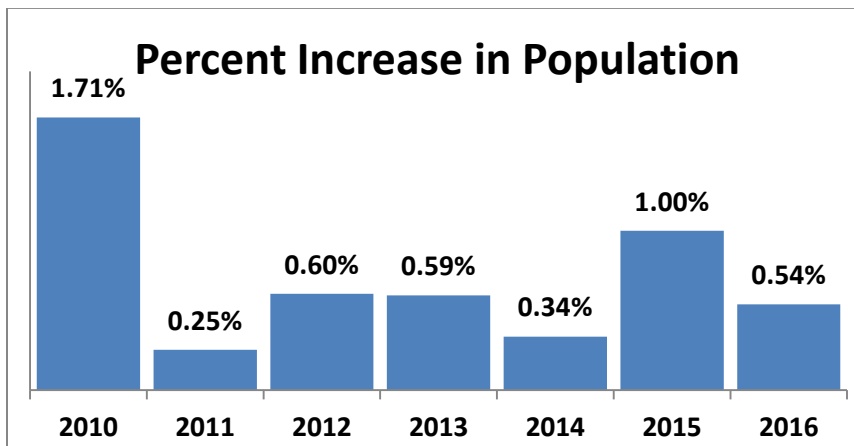
*Seasonal population (housing):* The number of residents living in residential housing units who spend less than six months in Martin County. The seasonal population in terms of the demand for residential housing units is calculated by multiplying the persons per household, unincorporated area, by the "vacant seasonal housing units" as classified by the US Census and defined in this chapter.

# General Statistics for Martin County

Comparison of Population for Martin County and State of Florida, 2000-2016				
Martin County			Florida	
	Estimated	Percent Change	Estimated	Percent Change
2000	126,731		15,982,824	
2001	128,873	1.69%	16,331,739	2.18%
2002	131,051	1.69%	16,674,608	2.10%
2003	134,491	2.62%	17,071,508	2.38%
2004	137,637	2.34%	17,516,732	2.61%
2005	141,059	2.49%	17,918,227	2.29%
2006	142,645	1.12%	18,349,132	2.40%
2007	143,737	0.77%	18,680,367	1.81%
2008	143,868	0.09%	18,807,219	0.68%
2009	143,856	-0.01%	18,750,483	-0.30%
2010*	146,318	1.71. %	18,801,310	0.27%
2011	146,689	0.25%	18,905,048	0.55%
2012	147,203	0.60%	19,074,434	0.90%
2013	148,077	0.59%	19,259,543	0.97%
2014	148,585	0.34%	19,507,369	1.29%
2015	150,062	1.00%	19,815,183	1.58%
<b>2016</b>	<b>150,870</b>	<b>0.54%</b>	<b>20,148,654</b>	<b>1.68%</b>

Source: Florida Office of Economic & Demographic Research (EDR) in conjunction with the Bureau of the Economic and Business Research (BEBR), Projections of Florida Population by County, 2020-2045, with Estimates for 2016. Volume 50, Bulletin 177, April 2017

\*Source: 2010 Census



# Population Estimates and Projections Methodology

The Florida Legislature’s Office of Economic & Demographic Research (EDR) is a research arm of the Legislature concerned with forecasting economic and demographic trends that affect policy making. EDR annually provides the Executive Office of the Governor population estimates of local governmental entities as of April 1. EDR works with the Bureau of Economic and Business Research (BEBR) to produce a series of high, medium and low projections. Please refer to BEBR’s “Florida Population Studies, Volume 50, Bulletin 177, April 2017,” for a description of BEBR methodologies. BEBR data is used in intervening years between the Census to derive population estimates and projections. The Population Technical Bulletin uses the BEBR medium permanent estimates and projections to generate population data for the County, the municipalities and for the unincorporated area. The County then uses U.S. Census, BEBR and other data to generate population projections for planning purposes as described below.

## Permanent Population

Estimates and projections for the municipalities are subtracted from total BEBR estimates and projections from the County to arrive at the unincorporated numbers. Table 1 contains BEBR and Census estimates for the four municipalities and the unincorporated area. The permanent population is broken out into "household population" and "group homes and prisoners". "Household population" is the Census term for permanent residents living in residential housing units - as opposed to hotels, group homes and jails.

For the portion of permanent population represented by prisoners and occupants of group homes, the number of Census prisoners and group home population were used to derive a percentage of the total population to arrive at a permanent population minus those institutions. The percentage of population in households, 97.31%, was applied to the unincorporated projections to arrive at peak population without prisoners or group homes, as defined in the CGMP as *Permanent population (housing)*. Below is a breakdown of the percentages used to arrive at the percentage of people not in prisons or group homes, which was used in Table 2 to arrive at the peak population for housing need.

### Breakdown of Household Residents versus Prisoner/Group Home Population

Census Data	2010 Census	Percent of total permanent residents
Permanent population in households	124,120	97.31%
Prisoners	1,744	1.37%
Group homes residents	1,702	1.32%
Total permanent residents	127,557	
Occupied housing	54,709	
Vacant seasonal housing	6,203	

Source: U.S. Census, 2010

*Seasonal population (housing)* refers to the number of residents living in residential housing units who spend less than six months in Martin County. The seasonal population in terms of the

demand for residential housing units is calculated by multiplying the persons per household in the unincorporated area by the "vacant seasonal housing units" as classified by the U.S. Census.

*Seasonal population (facility)* refers to the number of people in the unincorporated area defined as seasonal population (housing) plus part-time inhabitants who use, or may be expected to use, public facilities or services, but are not residents. This includes tourists, migrant farmworkers, and other short-term and long-term visitors. The County uses the *Seasonal population (facility)* to calculate the *Peak population (facility)* used in the planning of levels of service needs for some capital facilities.

### **Peak Population Methodology**

Peak population is the number of permanent residents and seasonal residents. Peak population projections and estimates are used to project future housing needs and for level of service planning.

### **Peak Population (housing)**

Table 2 contains estimates and projections for the household population and seasonal population that use residential housing for the Martin County unincorporated area. It is calculated by adding *Permanent population (housing)* and *Seasonal population (housing)*. The *Peak population (housing)* estimates and projections are used to project future housing needs.

In Table 2, the increase for the seasonal population is calculated using the percentage increase in the BEBR medium permanent estimates and projections for the time period covered.

- 2020 seasonal based on percent increase from 2010 Census calculation to 2020 BEBR medium – 7.12%
- 2025 seasonal based on percent increase from 2010 Census calculation to 2025 BEBR medium – 11.888%
- 2030 seasonal based on percent increase from 2010 Census calculation to 2030 BEBR medium – 15.69%
- 2035 seasonal based on percent increase from 2010 Census calculation to 2035 BEBR medium – 18.87%
- 2040 seasonal based on percent increase from 2010 Census calculation to 2040 BEBR medium – 21.51%
- 2045 seasonal based on percent increase from 2010 Census calculation to 2045 BEBR medium – 23.77%

Table 2 contains estimates and projections for the household population and seasonal population that use residential housing for the Martin County unincorporated area.

On April 26, 2016 the County adopted a remedial amendment due to a challenge to Ordinance 938 from 2013. The remedial amendment was adopted through Ordinance 997. Part of the challenge to Ordinance 938 was due to the fact that the County's Residential Capacity and Vacant Land Analysis used population estimates from the eastern urban service districts of the County combined with the western urban districts of the County. The Florida Governor and the Cabinet, sitting as the Administration Commission issued a Final Order pursuant to Section 163.3184, Florida Statutes. The Administrative Commission determined that these areas should

be considered separately for the purposes of the Residential Capacity and Vacant Land Analysis.

In order to separate the eastern urban service districts from the western urban service districts, 2010 Census Blocks were used to determine the 2010 population in the separate districts. This population was then converted to a percentage of the unincorporated total. The percentages are as follows.

	<b>% of total from 2010 Census</b>
<b>Unincorporated Total</b>	<b>100</b>
<b>Eastern USDs Total</b>	<b>86.36</b>
Eastern Primary	99.28
Eastern Secondary	0.72
<b>Indiantown USD Total</b>	<b>5.12</b>
Indiantown Primary	86.86
Indiantown Secondary	13.14
<b>Outside USDs</b>	<b>8.522</b>

These percentages were then applied to the *Peak population (housing)* estimates and projections in Table 2, resulting in Table 3.

### **Peak population (facility)**

The Peak population (facility) refers to the entire population in the peak season and includes permanent and seasonal residents in residential housing, as well as people in group homes, prisons and tourist facilities. The projections are used in capital facility planning. Chapter 14, the Capital Improvements Element, outlines the data sources for determining the Level of Service (LOS) for various County facilities. The LOS for sewer, potable water, roads, and other facilities are calculated based on specific information related to those services, while the LOS measures for corrections, libraries collections, prisons and sidewalk/bikepaths are based on the weighted average population. Peak population (facility) is used in the calculation of the weighted average. The weighted average population as outlined in Chapter 1, Section 1.7.E. assumes that five months of the year are peak population months and weighs the permanent and peak populations accordingly to produce the weighted average population for both countywide population and for the population of the unincorporated area.

*Peak population (facility)* is calculated by adding *Permanent population (facility)* to *Seasonal population (facility)* to calculate the peak population for level of service planning. The numbers include tourists, prisoners and group home residents. Table 4 shows *Peak population (facility)* projections for municipalities and the unincorporated area.

Martin County has traditionally seen a higher amount of hotel/motel revenue for five months out of the year. Out of twelve months, the highest five are considered peak months. Hotel/motel population for peak season for the unincorporated area is determined by using hotel occupancy data and hotel bed tax collections to estimate the average number of vacationers in the peak five months of the year.

1. First, annual hotel bed tax collections and hotel occupancy data are updated. Bed tax collections are provided by the Martin County Office of Management and Budget. Hotel occupancy data are provided by the Convention and Visitor's Bureau of Martin County.
2. The total of rooms rented is derived from dividing the tax revenue by average daily room rate for the month.
3. For each month, the total of rooms rented is multiplied by 1.615 (persons per room) to arrive at a functional population. The persons per room rate is a standard number used in the local hotel community.
4. The average of the highest five months of functional population are used for the hotel/motel population in the *population, peak (facility)* calculation.
5. For this Population Technical Bulletin, the average peak hotel population is 1,447.
6. Hotel population is distributed among municipalities and Planning Areas based on the location of each facility.

Below is the methodology for calculating peak population estimates and projections for defined levels of service, or *Peak population (facility)*, in the Comprehensive Growth Management Plan (See Policy 14.1A.2 and Policy 14.1A.3.).

- (1) Permanent population for the unincorporated area including prisoners and group homes are be derived from BEBR.
- (2) Seasonal population for the unincorporated area is determined by multiplying seasonal vacant residential units by the person per household number for the unincorporated area from the most recent decennial Census.
- (3) Peak season hotel/motel visitors are calculated as discussed above.
- (4) *Population peak (facility)*: It is calculated by adding *Permanent population* to *Seasonal population (facility)* to calculate the peak population for level of service planning. Hotel/motel population is included in the *Seasonal population (facility)*.

### **Weighted Average Population**

The weighted average population assumes that five months of the year are peak population months and the remaining seven months are permanent. The permanent and peak populations are weighed accordingly to produce the weighted average population estimates. This is done by multiplying the appropriate permanent population by seven, and the appropriate peak population by five, and dividing the total by twelve. These figures are used for the levels of service calculation for four public facilities: solid waste, prisons, libraries, and sidewalk/bikepaths.

Table 5 shows the weighted average population for the unincorporated area and municipalities.



## Population Estimates and Projections for Municipalities and the Unincorporated Area

**Table 1: Permanent Population for Municipalities and Unincorporated Area**

\*Percentage of unincorporated population NOT in group homes or prisons: See Methodology.

Municipalities City/County	*	2010	2016	2020	2025	2030	2035	2040	2045
<b>Total County</b>		<b>146,318</b>	<b>150,870</b>	<b>157,481</b>	<b>164,293</b>	<b>169,749</b>	<b>174,300</b>	<b>178,077</b>	<b>181,312</b>
Jupiter Island		817	810	810	810	810	810	810	810
Ocean Breeze Park		355	343	1,030	1,030	1,030	1,030	1,030	1,030
Sewalls Point		1,996	2,002	2,099	2,109	2,119	2,121	2,123	2,125
Stuart		15,593	16,197	16,906	17,638	18,224	18,712	19,118	19,465
Unincorporated		127,557	131,518	136,636	142,706	147,567	151,627	154,997	157,882
Unincorporated permanent population in households minus group homes and prisoners (TO BE USED IN TABLE 2, PEAK FOR HOUSING)	0.973	124,126	127,980	132,960	138,868	143,597	147,548	150,827	153,635

**Note:** The Town of Ocean Breeze estimates are based on 2015 estimates. Ocean Breeze is currently being redeveloped and the projections for 2020 through 2045 are based on the redevelopment buildout.

**Table 2: Peak population (*housing*)**

<b>Unincorporated</b>	<b>2010</b>	<b>2016</b>	<b>2020</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>	<b>2045</b>
Permanent population in households	124,126	127,980	132,960	138,868	143,597	147,548	150,827	153,635
Seasonal (Vacant Seasonal Units x 2.23)	13,833	13,833	14,818	15,476	16,003	16,443	16,808	17,121
<b>Total Peak for Housing</b>	<b>137,953</b>	<b>142,834</b>	<b>147,778</b>	<b>154,344</b>	<b>159,600</b>	<b>163,991</b>	<b>167,635</b>	<b>170,756</b>

**Table 3: Peak population (*housing*) for Residential Capacity Analysis**

	<b>% of total from 2010 Census</b>	<b>2016</b>	<b>2020</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>	<b>2045</b>
<b>Unincorporated Total</b>	<b>100</b>	<b>142,834</b>	<b>147,778</b>	<b>154,344</b>	<b>159,600</b>	<b>163,991</b>	<b>167,635</b>	<b>170,756</b>
<b>Eastern USDs Total</b>	<b>86.36</b>	<b>123,342</b>	<b>127,612</b>	<b>133,282</b>	<b>137,821</b>	<b>141,612</b>	<b>144,759</b>	<b>147,454</b>
Eastern Primary	99.28	122,458	126,696	132,325	136,832	140,596	143,720	146,396
Eastern Secondary	0.72	787	916	956	989	1,016	1,039	1,058
<b>Indiantown USD Total</b>	<b>5.12</b>	<b>7,319</b>	<b>7,572</b>	<b>7,908</b>	<b>8,178</b>	<b>8,403</b>	<b>8,589</b>	<b>8,749</b>
Indiantown Primary	86.86	6,357	6,577	6,869	7,103	7,299	7,461	7,600
Indiantown Secondary	13.14	962	995	1,039	1,075	1,104	1,129	1,150
<b>Outside USDs</b>	<b>8.522</b>	<b>12,172</b>	<b>12,594</b>	<b>13,153</b>	<b>13,601</b>	<b>13,975</b>	<b>14,286</b>	<b>14,552</b>

**Table 4: Peak population (facility) for Municipalities and Unincorporated Area**

<b>Municipalities City/County</b>	<b>2010</b>	<b>2016</b>	<b>2020</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>	<b>2045</b>
Jupiter Island	1,337	1,330	1,330	1,330	1,330	1,330	1,330	1,330
Ocean Breeze Park	435	423	1,110	1,110	1,110	1,110	1,110	1,110
Sewalls Point	2,054	2,060	2,157	2,167	2,177	2,179	2,181	2,183
Stuart	17,411	18,015	18,725	19,456	20,042	20,530	20,936	21,283
Unincorporated	142,308	146,269	151,387	157,457	162,318	166,379	169,749	172,634
<b>Total County</b>	<b>163,545</b>	<b>168,097</b>	<b>174,708</b>	<b>181,520</b>	<b>186,976</b>	<b>191,528</b>	<b>195,305</b>	<b>198,540</b>

**Table 5: Weighted Average by Municipalities and Unincorporated Area**

<b>Municipalities City/County</b>	<b>2010</b>	<b>2016</b>	<b>2020</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>	<b>2045</b>
Jupiter Island	1,034	1,027	1,027	1,027	1,027	1,027	1,027	1,027
Ocean Breeze Park	388	376	1,063	1,063	1,063	1,063	1,063	1,063
Sewall's Point	2,020	2,026	2,123	2,133	2,143	2,145	2,147	2,149
Stuart	16,351	16,954	17,664	18,395	18,981	19,470	19,875	20,222
Unincorporated	133,703	137,664	142,782	148,853	153,713	157,774	161,144	164,029
<b>Total County</b>	<b>153,496</b>	<b>158,048</b>	<b>164,659</b>	<b>171,471</b>	<b>176,927</b>	<b>181,479</b>	<b>185,256</b>	<b>188,490</b>

## Planning Area Estimates and Projections

Map 1 illustrates Martin County Planning Areas. Tables 6, 7 and 8 reflect the distribution of population across the County's Planning Areas. It is important to note that the Planning Areas are not contiguous with either municipal boundaries or the boundaries of the County's Urban Service Districts. While estimates are accurate for the current year, the projections are more variable. The distribution is based on the number of average number of housing units that received certificates of occupancy (COs) in each Planning Area over the preceding five years. They are not based on project approvals and are not used for facility planning. However, the totals for all Planning Areas for Table 6 match the Countywide projections provided by BEBR.

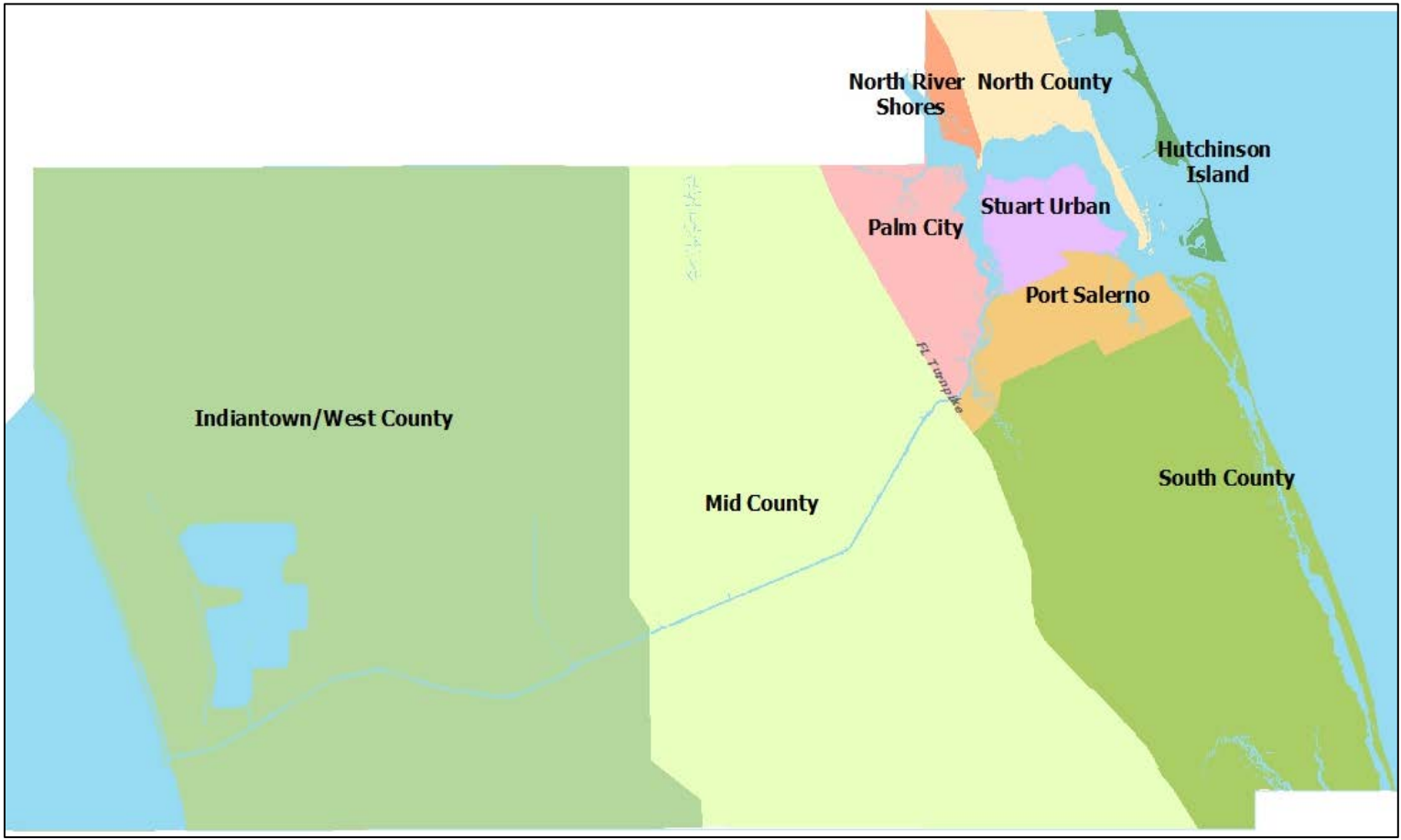
When new Census data is available, for example the 2010 Census data, census tract and block level data are disaggregated into Planning Areas.

1. The total population is distributed across the Planning Areas based on the average number of certificates of occupancy (CO) in each Planning Area from 2012 to 2016. The number of COs in each Planning Area is converted to a percentage of the total number of COs in the County. That percentage is used to distribute BEBR population projections to the Planning Areas. For example, if an average of 8.6% of all COs between 2012 and 2016 were issued in the North River Shores Planning Area, then 8.6% of the population is distributed to that Planning Area. That percentage is maintained for projections to the year 2045. The table below shows the average number of COs by Planning Area used in this document:

Percentage of all COs averaged from 2012-2016 by Planning Area	
North River Shores	8.6%
North County	13.5%
Hutchinson Island	2.5%
Stuart Urban	1.0%
Palm City	31.9%
State Road 76	7.6%
Mid-County	9.6%
South County	23.7%
Indiantown	1.5%

Table 7 shows permanent population by Planning Area. Table 8 shows peak population by Planning Area. Table 8 shows the weighted average population by Planning Area.

**Map 1 – Martin County Planning Areas**



**Table 6: Permanent Population by Planning Area**

<b>Comprehensive Plan Planning Areas</b>	<b>2010</b>	<b>2016</b>	<b>2020</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>	<b>2045</b>
N. River Shores	4,848	5,189	5,698	6,224	6,645	6,996	7,287	7,537
North County	17,237	17,772	18,571	19,395	20,054	20,604	21,061	21,452
Hutchinson Island	2,691	2,788	2,933	3,082	3,201	3,301	3,383	3,454
Stuart Urban	17,920	18,564	19,334	20,128	20,764	21,294	21,734	22,111
Palm City	23,120	24,380	26,264	28,205	29,760	31,057	32,133	33,055
Port Salerno/76 Corridor	22,248	22,550	23,001	23,466	23,838	24,149	24,407	24,628
Mid County	9,994	10,372	10,938	11,520	11,987	12,376	12,699	12,976
South County	37,952	38,887	40,285	41,725	42,878	43,841	44,639	45,323
Indiantown/West County	10,308	10,368	10,457	10,549	10,622	10,683	10,734	10,778
<b>Total County</b>	<b>146,318</b>	<b>150,870</b>	<b>157,481</b>	<b>164,293</b>	<b>169,749</b>	<b>174,300</b>	<b>178,077</b>	<b>181,312</b>

**Table 7: Peak population (facility) by Planning Area**

<b>Comprehensive Plan Planning Areas</b>	<b>2010</b>	<b>2016</b>	<b>2020</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>	<b>2045</b>
N. River Shores	5,344	5,685	6,194	6,720	7,140	7,492	7,783	8,032
North County	18,742	19,276	20,076	20,899	21,559	22,109	22,566	22,957
Hutchinson Island	5,522	5,619	5,763	5,913	6,032	6,132	6,214	6,285
Stuart Urban	20,902	21,546	22,316	23,110	23,745	24,276	24,716	25,092
Palm City	24,311	25,571	27,455	29,396	30,951	32,248	33,324	34,246
Port Salerno/76 Corridor	24,147	24,449	24,900	25,365	25,737	26,048	26,306	26,526
Mid County	10,468	10,847	11,412	11,995	12,461	12,851	13,174	13,450
South County	43,373	44,308	45,706	47,146	48,299	49,261	50,060	50,744
Indiantown/West County	10,736	10,796	10,886	10,977	11,051	11,112	11,163	11,207
<b>Total County</b>	<b>163,545</b>	<b>168,097</b>	<b>174,708</b>	<b>181,520</b>	<b>186,976</b>	<b>191,528</b>	<b>195,305</b>	<b>198,540</b>

**Table 8: Weighted Average by Planning Area**

<b>Comprehensive Plan Planning Areas</b>	<b>2010</b>	<b>2016</b>	<b>2020</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>	<b>2045</b>
N. River Shores	5,055	5,396	5,905	6,430	6,851	7,202	7,494	7,743
North County	17,864	18,399	19,198	20,022	20,681	21,231	21,688	22,079
Hutchinson Island	3,871	3,967	4,112	4,261	4,381	4,480	4,563	4,634
Stuart Urban	19,162	19,807	20,577	21,370	22,006	22,536	22,976	23,353
Palm City	23,616	24,877	26,760	28,702	30,256	31,553	32,629	33,551
Port Salerno/76 Corridor	23,039	23,341	23,792	24,257	24,630	24,940	25,198	25,419
Mid County	10,192	10,570	11,135	11,718	12,185	12,574	12,897	13,174
South County	40,211	41,146	42,543	43,984	45,137	46,099	46,898	47,582
Indiantown/West County	10,486	10,546	10,635	10,727	10,801	10,862	10,913	10,956
<b>Total County</b>	<b>153,496</b>	<b>158,048</b>	<b>164,659</b>	<b>171,471</b>	<b>176,927</b>	<b>181,479</b>	<b>185,256</b>	<b>188,490</b>