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April 20, 2005

Mr. Charles Gauthier  
Chief of Comprehensive Planning  
Department of Community Affairs  
2555 Shumard Oak Blvd.  
Tallahassee, FL 32399

Dear Mr. Gauthier:

Lake County is pleased to present additional information to support our population estimates through 2025. The attached analysis is prepared to support the County's position of higher population growth than indicated by the BEBR medium estimates, the regularly accepted estimates.

The County has used several alternative estimating tools for its final growth projections including unincorporated final certificate of occupancy numbers over the last five years and a combination of unincorporated solid waste households, census estimates of persons per households and tax roll certifications. Both the Lake County BCC and the Lake-Sumter MPO have accepted the population projections prepared by staff. Additionally, the MPO's consultant for long range transportation planning has already incorporated the average of the BEBR medium and high projections that approximate the increase in County estimates as reflective of actual, current and future growth for their planning and analysis—analysis which includes approved growth and developments in addition to historical data. We do not believe it is in the best interest of the county to use the BEBR medium projection and thereby underestimate our future land use allocations while our long range transportation plan, and Transportation Element, are being planned using the average of the BEBR medium and high projections.

The information included herein is provided in support of our request that you accept the County's proposed population projections through 2025 as part of our comprehensive plan amendment process. We provide these estimates and alternative validating methodologies as substantiation of this request. Staff strongly believes failure on our part to use accurate population projections could seriously hinder proper future growth management decisions that will necessarily be made as part of our comprehensive plan amendments. Therefore, DCA is urged to accept our adoption of the average of the BEBR medium and high population

*"Earning Community Confidence Through Excellence in Service"*

Mr. Charles Gauthier  
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We appreciate your consideration and ask that you confirm our projections at your earliest convenience so that we may continue our planning process using the aforementioned projections. Any questions you may have will be promptly answered.

Sincerely,

Gregg Welstead  
Deputy County Manager

Enclosures

c: Growth Management Directors  
Growth Management Staff

# Lake County Population Projections 2030

Presented here for your review are the methodology, data, and logic used by the Staff of the Lake County Growth Management Comprehensive Planning Division in estimating the future population of our rapidly expanding county. As you work your way through this document, and the supporting document *Lake County Municipal and Unincorporated Projections*, you will be presented with the reasoning behind our firmly held belief that the average of the BEBR medium and BEBR high projections—which are but 2% from our estimates—is the most accurate projection for our county. Of particular note is the fact that the Long Range Transportation Plan for the County, developed by the Lake-Sumter Metropolitan Planning Organization and their consultant, Tindale Oliver & Associates, have agreed to and thus incorporated the BEBR medium-high average in their work.

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Although we can all agree that Lake County is experiencing unprecedented growth, what we often have trouble agreeing on is *how much, and how fast, is the county growing?* An answer to that question lies herein.

Conventional population estimates are generally based on the Medium BEBR population estimates. However, in some cases where growth is either fast or slow, special generators or validating methodologies can be used to accept the High or Low BEBR population estimates. Staff offers the following analysis to validate the use of the High BEBR population estimates for Lake County.

According to the Census, as of 7/1/2000, Lake County had 212,842 residents. Over the next three years the population rose to:

Table 1: Historic Population Increase

Year	2000	2001	2002	2003
Population	212,842	223,610	233,835	245,061
Percent in unincorporated County	57.2%	58.1%	58.5%	59.1%

Based on these estimates, during the past two years Lake County experienced an average annual population gain of 5.5%. During this same time period, Staff tracked Final Certificates of Occupancy and Building Permits issued by the Lake County Building Services Department within unincorporated Lake County to find the following:

Table 2: Historic Number of Certificate of Occupancy and Permits

Year:	12/31/99	12/31/00	12/31/01	12/31/02	12/31/03	Average <sup>1</sup>
Certificates of Occupancy	2,640	3,023*	2,995	2,247*	2,507	2,714
Permits	2,925*	2,692	2,228*	2,318	2,682	2,564

<sup>1</sup> Refers to Statistical Calendar Year Average from attached spreadsheet with trimmed items.

\*Trimmed Items

## Lake County Population Projections 2030

Using COs as a measure of homes actually ready and available for residents, Staff took the actual population growth figures from unincorporated Lake County over the two most recent years and divided that by the number of COs issued for homes over the same two year period and calculated that the average household size for unincorporated Lake County is actually 3.176 as opposed to the 2.34 reported in the 2000 Census.

To estimate the total projected population the average household size of 3.176 was multiplied by the average number of COs issued of 2,714. The result of this calculation is a total projected population increase for the period ending 7/1/2004 of 8,619 for unincorporated Lake County. As the unincorporated County is home to an average of 58.8% of the population, the remaining 41.2% of the population can be attributed to the incorporated areas of the County. This 41.2% calculates into a population increase of 6,037 ( $1 - .588 * [8,619 / .588]$ ) for the incorporated areas and a total population increase of 14,656. However, to account for the vacancy rate, as not all homes issued a CO are actually sold or occupied, 3.03% was applied as the vacancy rate<sup>2</sup>. The result of applying the Vacancy Rate ( $14,656 * .0303$ ) is that 444 is deducted from our population increase ( $14,656 - 444 = 14,212$ ) for a total population of 259,273 for the period ending 7/1/2004.

Taken another step further, it can be extrapolate that the percentage increase in population from 7/1/2004 through 4/1/2005 will be 75% of the current increase (as this stated period is  $\frac{3}{4}$  of a year) giving us  $8,619 + 6,037 = 14,656 * .75 = 10,992$  additional residents. After applying the Vacancy Rate ( $10,992 * .0303$ ) we have to deduct 333 from our projections resulting in 10,659 and a final projected population total of **269,932** on April 1, 2005.

Staff has provided this alternative methodology to support the High BEBR population estimate of 269,600 as an accurate reflection of what demographic conditions in Lake County will be on 4/1/2005.

In order to expand on the current forecast and take it through the year 2030 Staff determined that you cannot extrapolate the same number of persons per household in future years as in the current year. In other words, we cannot continue to use the multiplier 3.176. Rather, it is best to return to a more standard number as expressed in the 2000 Census, an average household size of 2.34, until further annual population numbers have been established through the American Community Survey. (NOTE: The American Community Survey currently includes 16 Florida counties whose population was greater than 250,000 as of the 2000 census--Lake County is not one of the 16 and will be included in the future. The next decennial census, however, may be taken before Lake County is included).

Therefore, to extrapolate to years 2010, 2015, 2020, 2025 and 2030, Staff will recalculate the estimate of persons per household based on:

1. Our four-year average number of unincorporated final CO's, 2714.

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<sup>2</sup> Refer to Vacancy Rate spreadsheet calculations.

## Lake County Population Projections 2030

(NOTE: We continue the use of 2,714 because of the 10 year backlog of homes approved and the consistent growth experience. This average is one of the major factors that will be reviewed monthly and used to update projections. The backlog of approved PUD's will also be monitored as this, too, will affect the growth rate.)

2. A weighted average unincorporated population increase of known census estimated population increases
3. A continued unincorporated/incorporated percentages of population

Applying the calculation methodology for the years 2006 through 2010 yielded the following results:

Year	2010
Lake County Estimate	<b>323,885</b>
Medium BEBR Estimate	295,000
High BEBR Estimate	326,100

As a reference point, the total outstanding number of housing units approved for building in Unincorporated Lake County as of 10/1/04 is 28,357 which would allow the same rate of annual growth through the year 2015--even after consideration is given to the aforementioned vacancy rate calculation. This extrapolation would yield the following results through 7/1/2015:

Year	2015
Lake County Estimate	<b>362,460</b>
Medium BEBR Estimate	332,900
High BEBR Estimate	386,600

This extrapolation is based on the current backlog of existing homes already approved. However, since the approvals date from 1990, it can be extrapolated that the 14-year time lag allows for the inclusion of new approvals. The new approvals will continue to supplement the existing approved base and could provide for a continued pipeline of homes through the year 2030. It should also be noted that, starting with the year 2015, the growth rate has been throttled back to 50% of the trends currently observed. This scaling back is due to the unpredictability of multiple variables that could have considerable impact on the current population trends (e.g., economic fluctuations—local or national).

Finishing the extrapolation through the year 2030 yields the following:

Year	2020
Lake County Estimate	<b>407,381</b>
Medium BEBR Estimate	370,800
High BEBR Estimate	451,500

## Lake County Population Projections 2030

Year	2025
Lake County Estimate	<b>460,103</b>
Medium BEBR Estimate	407,200
High BEBR Estimate	519,800

Year	2030
Lake County Estimate	<b>522,519</b>
Medium BEBR Estimate	440,700
High BEBR Estimate	590,300

As a result of Staff efforts presented here, BEBR revised their projections upwards by 841 this past summer (letter dated 8/26/04). In collaboration with the consultant hired by the Lake-Sumter MPO (Tindale Oliver & Associates) that is working on the Lake County Long Range Transportation Plan, and currently under DCA review, it was determined that the average of the BEBR Medium and High population figures would be the best projections to use for our LOS calculations in the forthcoming Comprehensive Plan. The average variance through 2025 between the County projections and the average of the BEBR Medium/High figures is 1.14%.

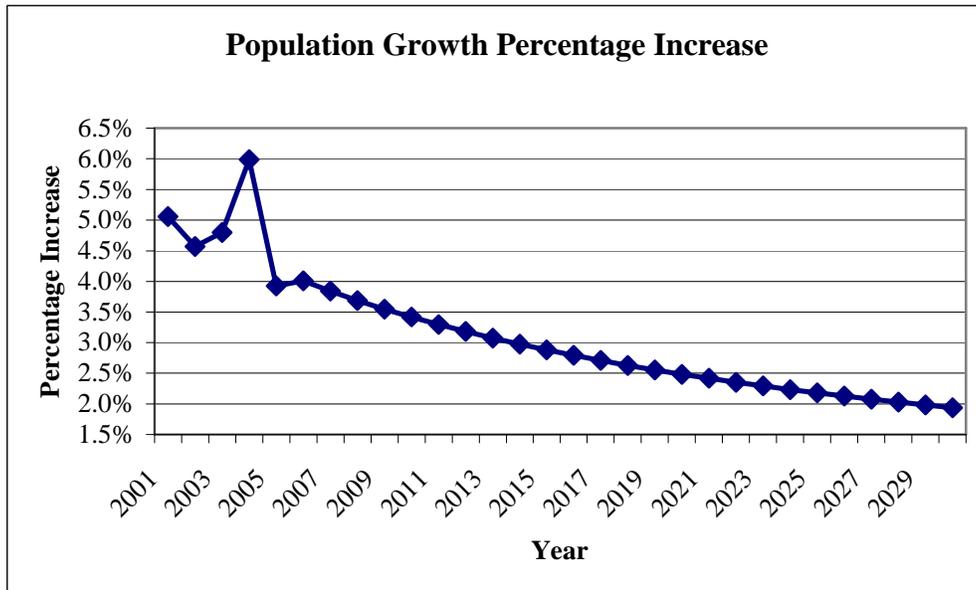
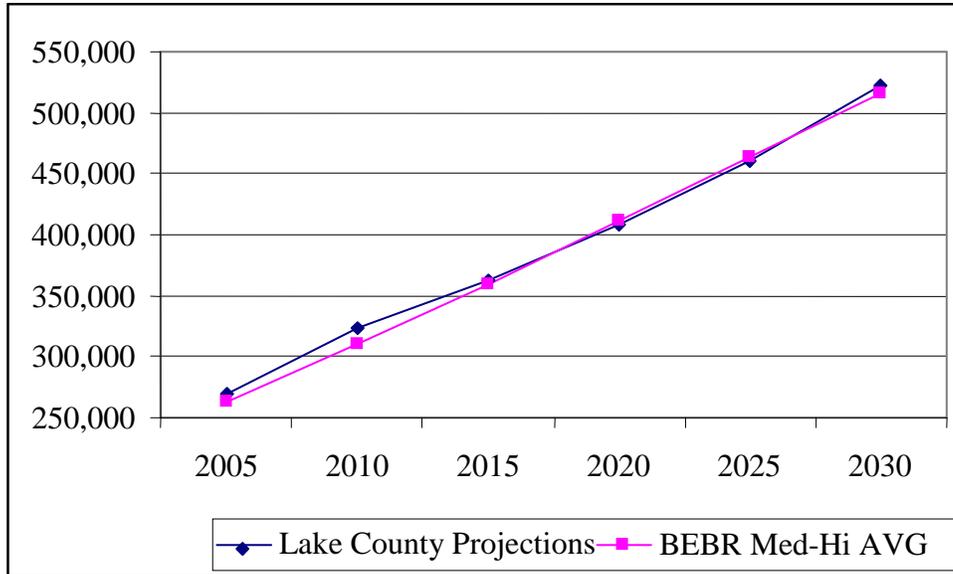
Below you will find graphical representations of the aforementioned data to allow for additional review, comparison, and analysis of our findings

Table 3: Summary of demographic projections through 2030 for Lake County.

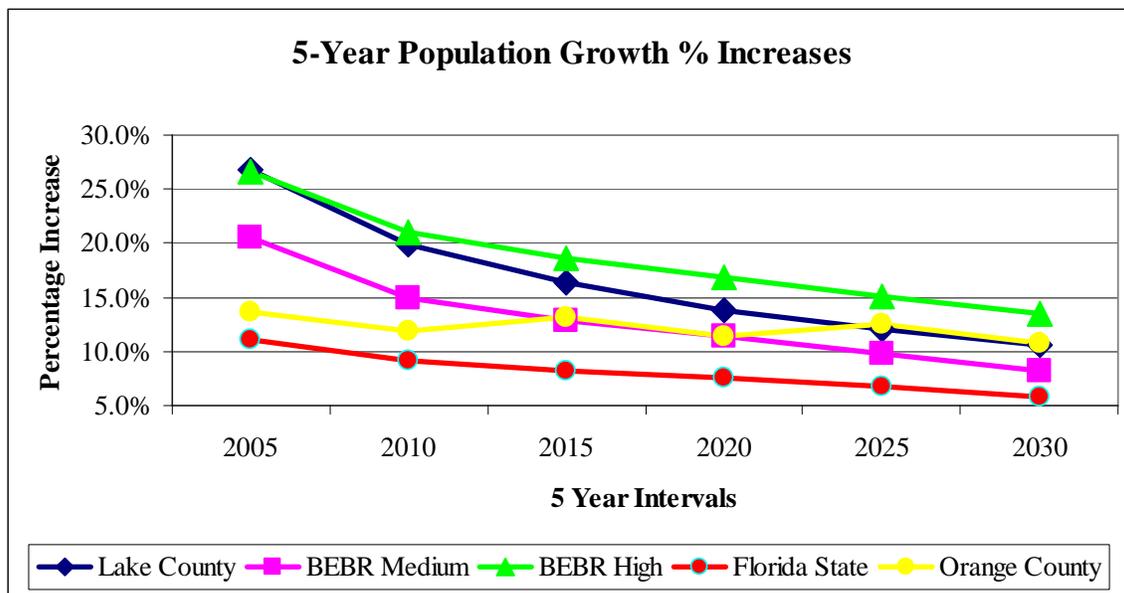
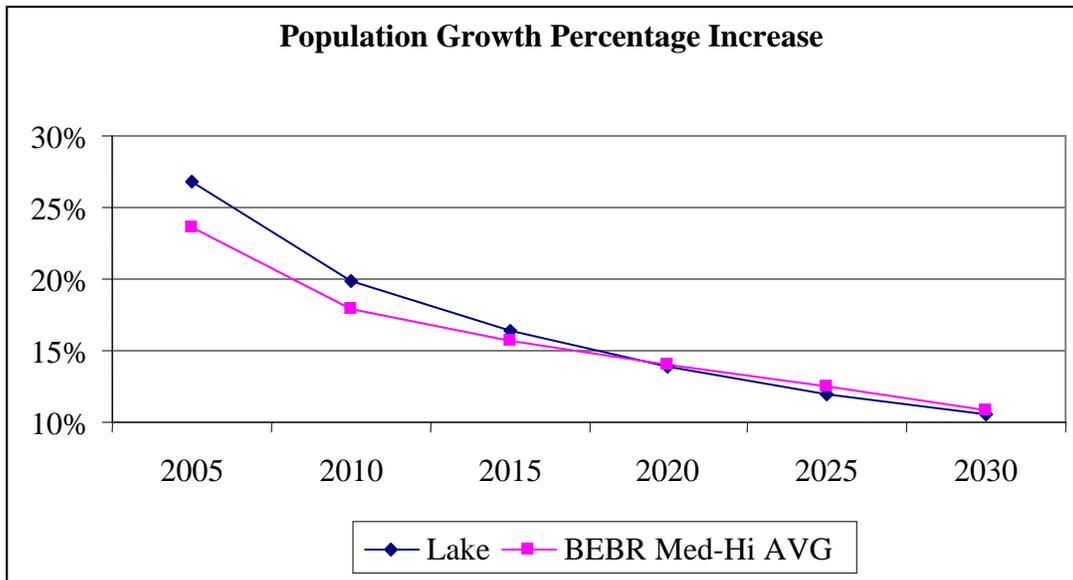
Year	Lake County	Census Estimates	BEBR Medium	BEBR High	Average BEBR Med-High
2000	212,842	212,842	-		
2001	223,610	224,172	220,322		
2002	233,835	234,909	231,072		
2003	245,061	245,877	240,212		
2004	259,273		-		
2005	269,932		256,700	269,600	263,150
2010	323,885		295,000	326,100	310,550
2015	362,460		332,900	386,600	359,750
2020	407,381		370,800	451,500	411,150
2025	460,103		407,200	519,800	463,500
2030	522,519		440,700	590,300	515,500

(Note: County estimates noted in Table 3 above, are for fiscal periods beginning in July of the year referenced.)

## Lake County Population Projections 2030



# Lake County Population Projections 2030



Please refer all questions and/or comments to:  
 Alfredo Massa, Senior Planner  
 Lake County Board of County Commissioners  
 Growth Management, Comprehensive Planning  
 315 W. Main St, Tavares, FL 32778  
 352-343-9632, x5832  
 amassa@co.lake.fl.us

## Lake County 2030 Municipal Projections

After completing our county-wide long range projections, we took the next logical step and focused on the municipal and unincorporated areas of Lake County. The first item we analyzed was the municipal growth rate over two four year periods [(a) 1999 through 2003 and, (b) 2000 through 2004]. For the period 1999 – 2003 we used data obtained from the U.S. Census website. For the year 2004 we took our internal calculations and compared them to the BEBR projections that focus primarily on electrical customer hook-ups. In instances where our projections were considerably less than BEBR’s (double digit negative variances, to be precise), we used an average based on special generators to rationalize our divergence from our standard methodology and to reassign population out of the unincorporated areas into cities.

Figure 1: Special Generators for 2004

1. Solid Waste Tonnage: calculated from current tonnage / generation rate * household size (e.g., Clermont, FL: $8900/1.3*2.29=15678$ ).
2. Electrical Hook-Ups: calculated from 2000 households / 2000 electrical customers * 2004 households * household size (e.g., Clermont, FL: $3995/4164*7932*2.29=17427$ )
3. Actual final CO’s for Clermont and Montverde using the same methodology as noted in <i>Lake County Population Estimates-Long Range.doc</i> .

Based on the aforementioned data sources and methods, the following rates of growth were calculated:

Table 1: Lake County municipal and unincorporated rates of growth for the periods 1999-2003 and 2000-2004.

PLACE	1999 - 2003	2000 - 2004	Average Growth
Astatula	19.37%	23.41%	21%
Clermont	17.04%	84.35%	51%
Eustis	8.44%	7.41%	8%
Fruitland Park	8.19%	6.90%	8%
Groveland	91.34%	77.82%	85%
Howey-In-The-Hills	18.50%	17.36%	18%
Lady Lake	10.13%	10.99%	11%
Leesburg	9.70%	4.36%	7%
Mascotte	48.61%	46.60%	48%
Minneola	16.67%	34.38%	26%
Montverde	4.67%	27.15%	16%
Mount Dora	12.21%	11.88%	12%
Tavares	15.27%	14.31%	15%
Umatilla	11.72%	9.81%	11%
Unincorporated	26.89%	19.60%	23%

## Lake County 2030 Municipal Projections

All things being equal, and continuing similar observed trends, we predicted that the individual municipalities would comprise the same percentage of the population in 2005 as in 2004 resulting in the following municipal projections:

Table 2: Lake County Municipal Projections for 2004 and 2005.

Place	2004	2005
Astatula	1,575	1,640
Clermont	17,352	18,066
Eustis	17,205	17,912
Fruitland Park	3,578	3,725
Groveland	4,166	4,338
Howey-In-The-Hills	1,154	1,201
Lady Lake	13,434	13,986
Leesburg	18,154	18,900
Mascotte	3,873	4,032
Minneola	7,392	7,696
Montverde	1,120	1,166
Mount Dora	10,844	11,290
Tavares	11,421	11,891
Umatilla	2,548	2,652
Unincorporated	145,456	151,436
Total	259,273	269,932

Population projections for 2010 through 2030 are based on two hypotheses:

1. For the period 2005- 2010, and due to the present backlog of permitted PUD's, proposed developments, and on-going construction, we predict growth to be similar to current trends. Therefore, we used an average of the two four year periods noted in Table 1 for each municipality.
2. For the period 2015 - 2030, and given the normal fluctuations in market trends and economic uncertainty past a 10-year horizon, we have throttled back our growth percentages to 50% of current trends (growth rate in use for 2010 was divided by 2). Said multiplier was then used to calculate population growth through 2030 for each municipality.

## Lake County 2030 Municipal Projections

Table 3: Growth Multipliers used to calculate population projections for 2010 and the period covering 2015-2030.

Place	2010	2015-30
Astatula	20%	10%
Clermont	51%	25%
Eustis	10%	5%
Fruitland Park	10%	5%
Groveland	76%	38%
Howey-In-The-Hills	19%	10%
Lady Lake	11%	6%
Leesburg	10%	5%
Mascotte	45%	22%
Minneola	26%	13%
Montverde	16%	8%
Mount Dora	14%	7%
Tavares	16%	8%
Umatilla	13%	7%
Unincorporated	23%	12%

Table 4: Lake County Municipal and Unincorporated Population Projections 2010-2030.

Place	County 2010	County 2015	County 2020	County 2025
Astatula	2,049	2,269	2,511	2,780
Clermont	22,696	28,448	35,658	44,696
Eustis	18,604	19,341	20,108	20,904
Fruitland Park	3,832	3,977	4,127	4,283
Groveland	8,898	12,660	18,015	25,633
Howey-In-The-Hills	1,394	1,518	1,655	1,803
Lady Lake	15,246	16,051	16,899	17,791
Leesburg	19,064	19,734	20,427	21,145
Mascotte	6,221	7,701	9,535	11,804
Minneola	10,746	12,370	14,239	16,390
Montverde	1,355	1,463	1,579	1,705
Mount Dora	12,357	13,101	13,890	14,727
Tavares	13,356	14,343	15,404	16,544
Umatilla	2,814	2,965	3,125	3,293
Unincorporated	186,317	207,969	232,136	259,112
Totals:	323,885	362,460	407,381	460,103
BEBR Med/High Avg:	310,550	359,750	411,150	463,500

## Lake County 2030 Municipal Projections

Update March 1<sup>st</sup>, 2005:

Recently BEBR released, and the Governor's Office accepted, their official April 2004 population estimates. For Lake County BEBR estimated that there are 251,878 residents as of April 2004.

In the BEBR report released on April 2003, the county was estimated at 240,716. For the 2003-2004 time periods, the percentage increase reported by BEBR is 4.64% (251,878-240,716/240,716). As part of the same April 2003 Projections Report, BEBR also reported projections through the year 2030. For the year 2005, BEBR estimated that Lake County would have either 256,700 as the BEBR medium or 269,900 for the BEBR high. When we compare the BEBR medium estimate for 2005 along with the BEBR April 2004 estimate, the county shows a growth of only 1.9% from 2004 to 2005 (256,700-251,878/251,878). Realistically, based on the count of building permits and final CO's issued, during the periods of 2001 through 2003, the county has been growing by an average of 4.9% per year.

If we were to use the average of the BEBR medium and high (as recommended by Tindale Oliver & Associates--the Lake-Sumter MPO transportation consultants), you obtain a more realistic 2004-2005 growth rate of 4.5% and an estimated 2005 population of 263,150.

Staff also compiled the most recent count of both building permits and the count of final Certificates of Occupancy that have been issued through February 28, 2005. As shown in Table 5, the Lake County Building Department issued a record number of building permits for the year ended December 31, 2004, with a final tally of 3,488. Also from Table 5, January 2005 was a record setting month as its tally of 317 permits exceeded any previously recorded measure for the month of January.

Table 5: Residential Permits Issued 1999 through 2005

RESIDENTIAL UNIT PERMITS ISSUED													
	<u>Jan</u>	<u>Feb</u>	<u>Mar</u>	<u>Apr</u>	<u>May</u>	<u>Jun</u>	<u>Jul</u>	<u>Aug</u>	<u>Sep</u>	<u>Oct</u>	<u>Nov</u>	<u>Dec</u>	<u>Total</u>
1999	239	227	326	251	267	299	259	254	230	206	186	181	2,925
2000	203	247	240	250	219	386	164	186	224	200	208	165	2,692
2001	169	159	232	191	211	188	216	213	133	207	162	147	2,228
2002	163	174	215	185	163	177	250	222	201	203	160	205	2,318
2003	193	202	201	207	202	252	205	261	248	248	177	286	2,682
2004	227	271	281	301	339	327	293	324	250	286	282	307	3,488
2005	317	231											548

## Lake County 2030 Municipal Projections

Table 6, the count of Certificates of Occupancy issued, shows the continued upward trend in the availability of habitable homes.

RESIDENTIAL UNIT CERTIFICATES OF OCCUPANCY ISSUED													
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1999	181	204	233	209	210	197	249	204	204	218	223	308	2,640
2000	219	195	248	227	246	219	193	280	247	363	252	334	3,023
2001	292	359	271	178	207	226	225	213	299	344	178	203	2,995
2002	197	143	142	189	178	159	174	215	235	219	194	202	2,247
2003	302	244	163	214	190	228	224	168	183	196	175	220	2,507
2004	157	231	243	235	217	250	203	247	174	183	254	253	2,647
2005	270	263											

Update March 28<sup>th</sup>, 2005:

At the request of DCA, Staff reviewed population estimates from the Bureau of Economic & Business Research at the University of Florida (BEBR) from 1980 to the present. The aforementioned data is graphically presented in Figure 2—see next page.

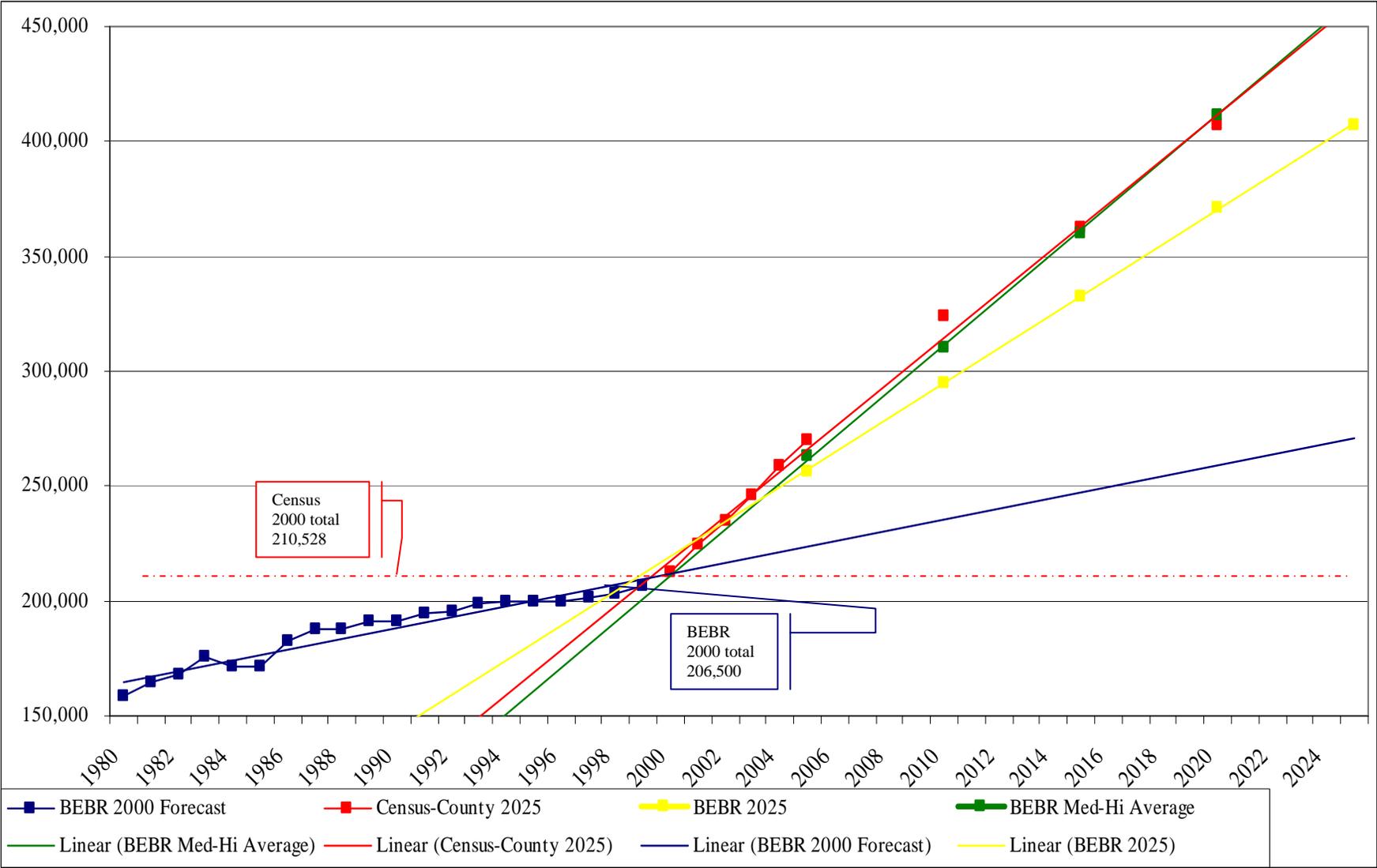
Table 8, below, shows a high variance of 33% registered for the BEBR forecasts made in 1980 which narrowed to a 10% variance in 1990 and then was further narrowed to a 2% variance in 1999

BEBR Variance to Census 2000			
1980	33.1%	1990	10.1%
1981	28.0%	1991	8.2%
1982	25.2%	1992	7.7%
1983	20.0%	1993	5.8%
1984	23.0%	1994	5.4%
1985	22.9%	1995	5.3%
1986	15.5%	1996	5.4%
1987	11.9%	1997	4.6%
1988	12.4%	1998	3.6%
1989	10.1%	1999	2.0%

# Lake County 2030 Municipal Projections

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# Lake County 2030 Municipal Projections



Last update March 28, 2005, by Alfredo Massa

## Lake County 2030 Municipal Projections

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## Lake County 2030 Municipal Projections

The data from 1980 through 1999 (color code blue) shows that the decade of the '80s had an average annual growth rate of 2.16% and the decade of the '90s had an average annual growth rate of only **0.86%** as evidenced by the *almost* flat slope of the trend line displayed in blue. Current BEBR long range forecast (shown in yellow) projecting out past 2005 (2010, 2015, 2020, and 2025) display average annual growth rates of less than 2.4% (see Table 7).

Table 7: BEBR Forecast 2025

Year	BEBR Medium0020Forecast	% 5 yr Growth	AVG Annual Growth
2005	256,700		1.91%
2010	295,000	14.92%	2.98%
2015	332,900	12.85%	2.57%
2020	370,800	11.38%	2.28%
2025	407,200	9.82%	1.96%

As noted by Staff in the March 1<sup>st</sup> update (above) and also in our *Lake County Projections-2030* document, the measured trends in the issuance of building permits and Final Certificates of Occupancy clearly detail an average annual growth rate of at least 4.5%. The County projections (noted in red in the above graph—and mirrored by the average of BEBR medium and high projections color coded green) are based on these measured trends.

Staff would highly recommend that DCA give stronger credence to the recent growth rates that have been observed and measured in Lake County over the past five years, as noted in the two reports presented to you, and the clear likelihood that these trends will continue in the immediate future.