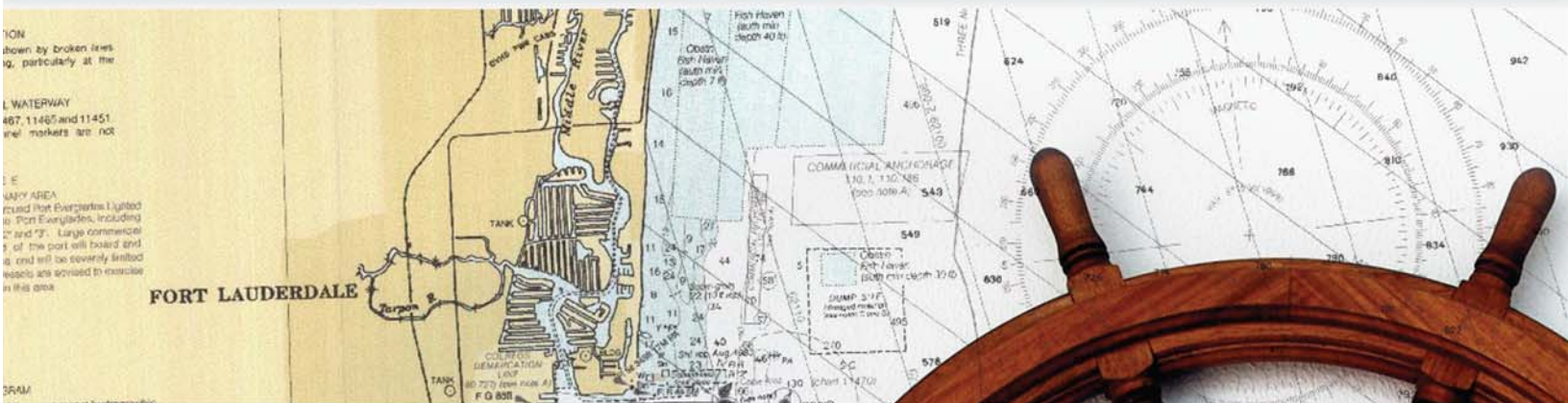


Charting the Course

Where is South Florida Heading?



Center for Urban and Environmental Solutions (CUES) Regional Initiatives

CUES at FAU will focus its regional initiatives on fostering solutions to challenges identified in *Charting the Course: Where is South Florida Heading?* Current regional programs include:

RESEARCHSouthFlorida: Facilitates collaboration among South Florida's researchers to work in inter-organizational and interdisciplinary teams to help resolve some of the region's complex problems. See www.researchsouthflorida.org for more information.

Florida Public Officials Design Institute at Abacoa: Elected officials are educated on how to use different design options and tools to address specific community problems and integrate social, economic, and environmental concerns into city plans. See www.floridadesigninstitute.org for more information.

The South Florida Regional Resource Center: A partnership organization administered by CUES that also includes the Collins Center for Public Policy, Inc., and the South Florida and Treasure Coast Regional Planning Councils. See www.sfrrc.net for more information.

Regional Indicators: Reports and monitors the demographic, environmental, and economic conditions of the region, identifies trends and critical issues, and demonstrates the interconnectedness of the seven counties in order to raise community awareness and stimulate innovative regional solutions. See www.softo.org for more information.

Funding: This report is generously supported by a grant from the John D. and Catherine T. MacArthur Foundation. It updates our 2004 *Regional Shift: South Florida in Transition* and continues the emerging dialogue about the South Florida region and its future. For more information on the MacArthur Foundation, visit www.macfound.org.





FLORIDA ATLANTIC UNIVERSITY

Office of the President

March 1, 2006

We are pleased to release the third regional indicators report "Charting the Course: Where is South Florida Heading?" published by Florida Atlantic University's Center for Urban and Environmental Solutions (CUES). In the first report, a key objective was to define South Florida as a region of individual communities that share a single, intertwined destiny. The second report used the 2000 Census to develop a baseline of indicators and focused on major transformative changes under way in South Florida. Since that time, all of the major regions of the state—South Florida, Central Florida, Tampa Bay, Northeast and Northwest Florida—have been developing their own efforts to define their identities. The work of the Florida Chamber Foundation's Cornerstone initiative and the Urban Land Institute's Florida Committee for Regional Cooperation reinforces the view that the Sunshine State is made up of a collection of distinct urban and rural regions, each with a unique, competitive niche.

Since 2000, South Florida has added 400,000 residents; another 2.5 million are expected to arrive over the next 25 years. Considering the impact of such dramatic growth on housing, transportation, the environment and the economy, this report not only updates key trends, but also projects these trends to 2030. We hope this report invites informed discussion about whether projected trends will lead to future sustainability and prosperity over the next 25 years. The vitality of Florida's regions will determine the future of the state.

One of the most significant ways FAU makes contributions to communities in its service region is through research that impacts the lives of citizens. The published research findings prepared by the faculty and staff at CUES directly support the University's Strategic Plan goal to meet community needs and fulfill unique institutional responsibilities. This research fosters community awareness, stimulates collaboration among South Florida's leaders to address critical issues and facilitates innovative solutions. FAU looks forward to partnering with other higher education institutions to enhance the state's research capacity and expand its economy.

We want to acknowledge the generous support of the John D. and Catherine T. MacArthur Foundation in making this publication possible. Mr. MacArthur was a visionary whose investments helped shape this region. We are pleased that his legacy is helping to encourage thoughtful discussion about its future.

Frank Brogan
President

James F. Murley
Director, Center for Urban &
Environmental Solutions

Charting the Course: Where is South Florida Heading?

**A Report by the Anthony J. Catanese
Center for Urban and Environmental Solutions
at Florida Atlantic University**

**Funded by the
John D. and Catherine T. MacArthur Foundation**

**James F. Murley, JD
Lenore Alpert, PhD
Lindsay O. Walker, MA
M. J. Matthews, JD
MaryBeth Burton, MLA, AICP
Christina M. Bryk, MS
Matthew Kurry, MA**

**In consultation with
Allan Wallis, PhD
Associate Professor of Public Policy
University of Colorado at Denver**

2006

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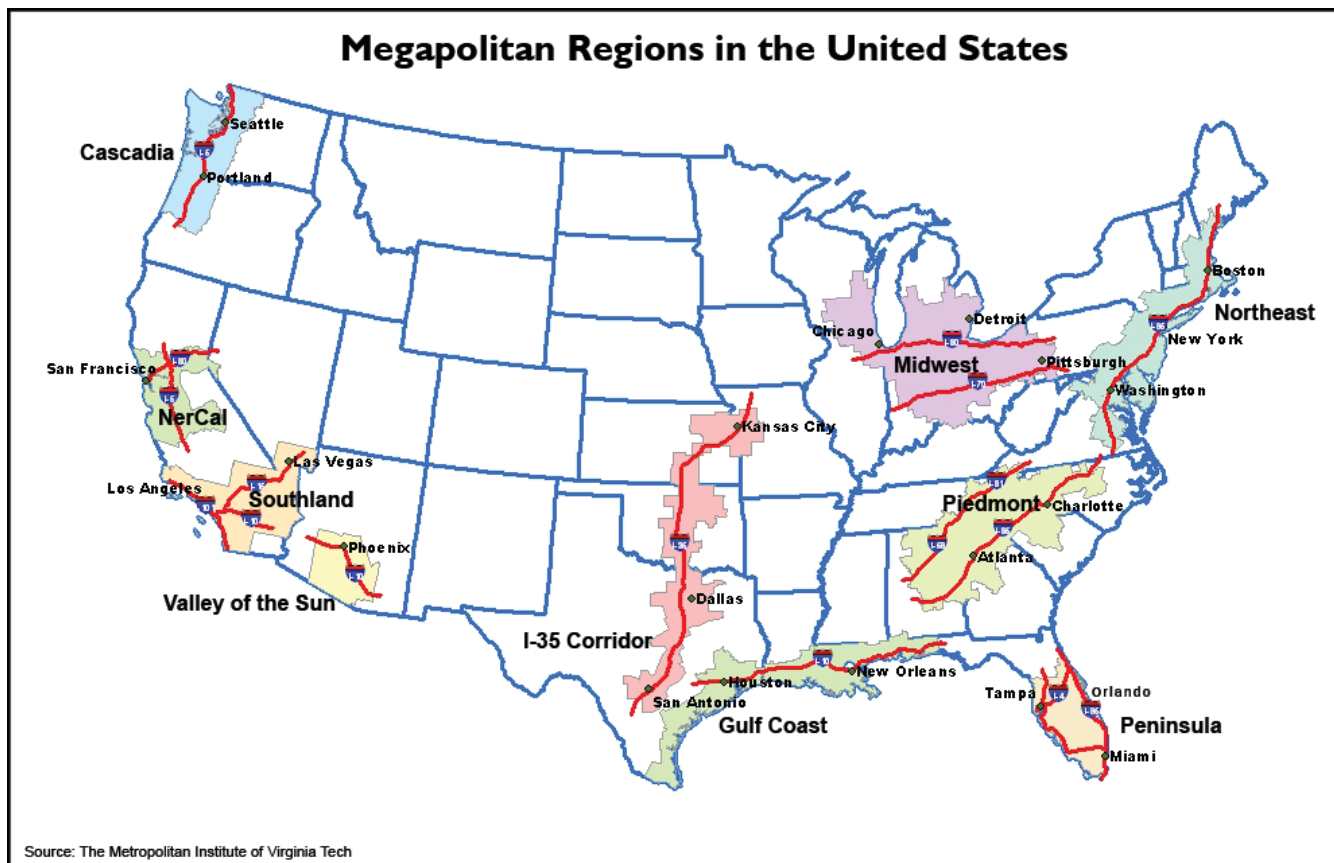
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Introduction

The United States has become a nation of regions, with a shared destiny among individual communities within those regions. We acknowledge that reality in the way we live our daily lives, which involves traveling from one community to another for work, play, and services, often crossing county and, in some regions, national boundaries. The physical infrastructure that supports these regions (e.g., roads, drainage, water supply) must be integrated, and to a large extent they are. Labor and housing markets are also integrated, though not by policy. Individual communities share a common responsibility for protection of the physical environment. Governor Bush endorsed this regional perspective when describing the potential impact of Scripps Research Institute on South Florida: “I think we’ve gotten a little too focused on zip codes. It’s time to move on. . . . We’re a region.”¹

MEGAPOLITAN REGIONS

Robert E. Lang and Dawn Dhavale of the Metropolitan Institute at Virginia Tech have advanced the concept that a new trans-metropolitan geography is emerging across the United States. “Megapolitan Areas” are “large-scale, clustered networks of two or more metropolitan and Micropolitan areas”² that are connected spatially and functionally. They have resulted from the rapid integration of cities and regions in the nation over the past 50 years “because of massive decentralization . . . and corridors of linked urban space, with accelerated movements of people and goods among them.”³ Key components of the mega-region are a shared physical environment, economic networks, transportation infrastructure networks, and shared culture and regional identity. While these mega-regions contain less than one-fifth of all land area in the continental U.S., they house more than two-thirds of the nation’s population, almost 200 million people. Each mega-region is expected to exceed 10 million residents by 2030. Lang and Dhavale advocate formal recognition by the U.S. Census Bureau in order to foster recognition by private industries and local governments and improve large-scale regional development.⁴ These metropolitan areas working as a mega-region are targeted as critical components



to the “21st century survival and success”⁵ of the nation. The “Peninsula” megapolitan region extends from Central Florida to the tip of the state. It could even expand to include Caribbean and Latin American areas. In 2003, it covered 1.2 percent of the total continental U.S. land mass and almost 5 percent of its population.⁶ The international trading region, known as the “Floribbean,” combines all of Florida with the surrounding Caribbean and Latin American area.

FLORIDA’S REGIONS

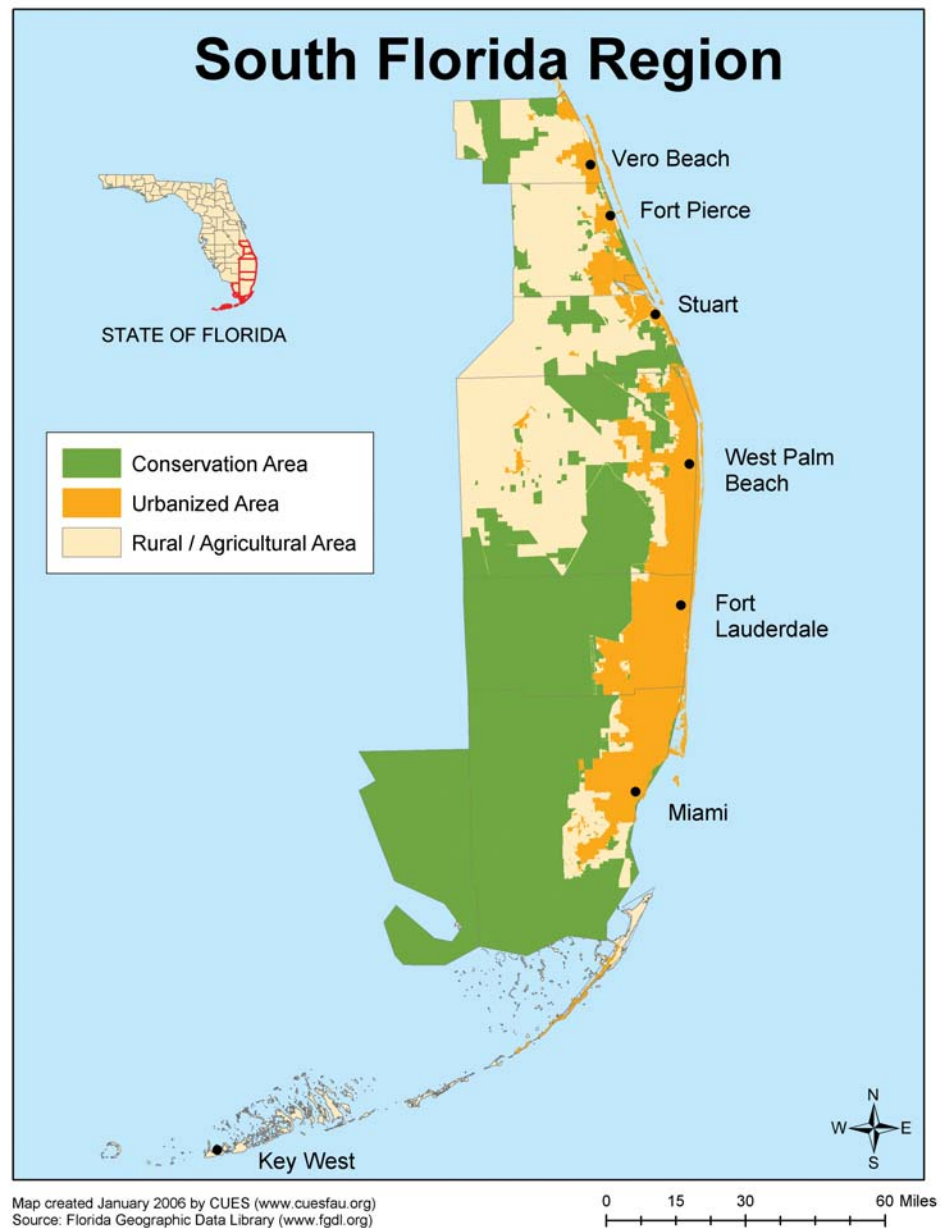
In 25 years or less, Florida will surpass New York, becoming the third most populous state in the nation. Interestingly, the three largest states then will all be located in the Sunbelt and will likely remain, as they are today, major gateways for immigrants—especially Hispanics—into this country. But population growth and increased size do not guarantee success. Success consists of growing larger while also becoming more sustainable and more prosperous. All of Florida’s regions are experiencing many of the same growth-related issues. Some regions are beginning to identify themselves as such, realizing that many of today’s important issues—housing, transportation, education, economic diversification—must be addressed by collaborating across county and municipal boundaries. Enterprise Florida, the economic development entity for the state, has identified eight distinct economic regions in Florida in its Strategic Economic Development Plan for the state. These same eight regions are used by the Florida Department of Transportation in its Strategic Intermodal Systems Plan. This report relies on these urban and rural regions of the state as the basis for its regional analysis. The Cornerstone report, developed under the auspices of the Florida Chamber Foundation, encourages approaching economic development in the state from the perspective of regional competitiveness. The Florida Chamber Foundation recognizes the importance of regional approaches and that strong regional partnerships are important components to realizing Florida’s economic potential. It emphasizes “nurturing home-grown businesses and workers and expanding their global markets”⁷ in order to diversify and strengthen the economy, facilitate prosperity among workers, and improve quality of life. The Urban Land Institute also recognizes that regional solutions and state support are critical to Florida’s economic and social health, urging the use of indicators to benchmark progress toward regional goals and to measure the effectiveness of regional policies.⁸



THE SOUTH FLORIDA REGION

South Florida will continue as the state's most populous region over the next two decades, with a population larger than 35 states. The region stretches along Florida's southeast coast, bounded by the Atlantic Ocean on the east and the Everglades on the west, extending from Sebastian Inlet in the north to the Florida Keys in the south. Interestingly, South Florida has evolved as a linear coastal band of highly urbanized, increasingly continuous communities, with no truly dominant core cities. Much of the land area covers protected federal wetlands and agricultural reserves, most notably the Everglades and Lake Okeechobee, confining urban development to the east.

This report discusses the South Florida region as a seven county area, consistent with Enterprise Florida's definition. The region's most populous core counties are Miami-Dade, Broward, and Palm Beach. Martin, St. Lucie, and Indian River counties in the Treasure Coast sub-region, along with Monroe County in the far south, are also included as part of the South Florida region because a substantial part of their present and projected growth will be an extension of developments in the core counties. This seven county region is designated as the "Southeast Florida Region" by Enterprise Florida and by the Florida Department of Transportation. We have used the term "Southeast" Florida interchangeably with "South" Florida to define the study region for this report.



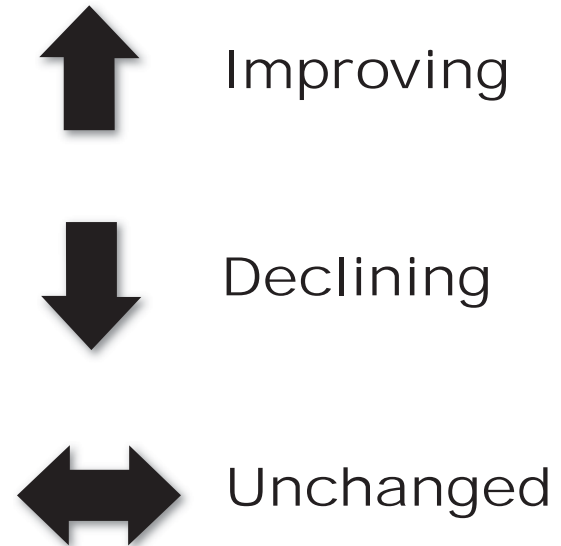
ORGANIZATION OF THE REPORT

Focus on 2030

Over the past four years we have tracked key trends in the South Florida region, reaching back a decade or two to discern their trajectory to the present. In this report, we extrapolate some key trends to the year 2030. By that date, the region's population is projected to increase by 42 percent, to about 8.4 million people. Long-term planners in a number of public agencies are already working to determine how that population will be accommodated. Where possible, our report employs their forecasts, but we have also relied on the opinions and commentary of key regional observers to help image the future.

Key Trends

The trends reported here are organized in three sections: People, Place, and Prosperity. These are the three areas in which sustainable development is usually analyzed. We open each section with a two-page spread highlighting key changes. The direction of trends is indicated with arrows: an up arrow indicating an improving trend, a down arrow indicating decline, and a horizontal arrow indicating no significant change. The body of each section looks at specific trends in detail. Trends are reported for the region as a whole, for all seven counties, for the core counties, or for the Metropolitan Statistical Areas (MSA) within the region, depending on data availability. In addition, some indicators focus on the Treasure Coast sub-region, and where necessary, we highlight the sub-region to demonstrate its unique identity (📍 Focus on Treasure Coast). In many ways, the Treasure Coast is emerging as the primary growth area of the region that has not yet experienced the dramatic changes of its populous neighbors to its south. While it is important to note the differences, it is also crucial to include these counties as part of the region and to track the changes underway at the edge of the region.



Hurricane Focus

A “Spotlight on the Hurricanes” in Place and Prosperity highlights the impact of the 2004 and 2005 hurricane seasons on South Florida. Where possible, we have included data on the impact on housing and the economy. Climate experts predict a cycle of increasing hurricane activity, and in the future, we will monitor preparedness activities and degree of community resiliency to catastrophic tropical climate events.

Regional Comparisons

Trend information is followed by a comparison of South Florida with other urban regions in the state. We hope that these comparisons provide a perspective on how Florida as a whole is now comprised primarily of regions. The future of those regions—each quite distinct and largely complementary to one another—is the future of the state. These regions can learn from each other, particularly where they share similar challenges. They can strengthen their cause by collaborating to address problems that cross regional boundaries. Five regions—South Florida, Central Florida, Tampa Bay, Northeast and Northwest Florida—have identified themselves as part of the Florida Regional Indicators Network, started by CUES in 2004. Data are reported in this section either for whole regions, the core counties of the regions, or the MSAs within the regions, depending on data availability.⁹

Visioning the Future

In charting our future, we are unable to determine a specific direction because the region lacks an overall vision. While this report compares trends and develops scenarios, the region is missing this long-term vision to help direct and guide us to the most desirable future. We have incorporated interviews with experts from across the region to provide insights into the future needs and potential choices for South Florida. Scenarios are developed in the Conclusion to illustrate these “windows in the future,” which can be used to frame the regional outlook in 2030. By using scenarios, we have tried to capture the scope of choices about where the region is heading.

People

Over the next 25 years, Florida's population will reach 25.5 million people, and the state will become the third most populous in the U.S., behind California and Texas. It will also rank among the fastest growing states, with a growth rate nearly three times that of the nation.¹ During the same period, South Florida is expected to remain the most populous part of the state, adding 2.5 million people. However, its growth rate in the next quarter century is expected to be slower than that experienced over the last 25 years.

The greatest source of South Florida's current population growth comes from international immigration originating in Latin America and the Caribbean. The region is now composed of immigrants, domestic newcomers, and native Floridians, whose backgrounds, cultures, and needs are increasingly diverse. South Florida exemplifies the rapid demographic transformation of the U.S., which is now experiencing the second largest period of international immigration in its history. This transformation consists of the development of gateway regions, with higher than average concentrations of foreign-born residents, and boomer regions, with higher than average concentrations of retired people.² Today the southern part of South Florida is clearly a gateway, while the northern part is a boomer stronghold. Will this dual pattern become more pronounced by 2030 or will the entire region become a gateway?

South Florida has many opportunities and challenges resulting from rapid population growth and increasing diversity, including closing the gap between growing economic and social disparities. South Florida is home to extreme disparities, including some of the poorest and richest cities in the nation. Poverty and wealth are geographically concentrated, with barrier islands and Intracoastal locations housing the greatest wealth, and inner city neighborhoods and outlying rural areas containing the greatest poverty. Will this pattern continue, widening divisions between the rich and poor? Or will the region retain and grow its middle-class by creating educational and economic opportunity for all residents?



SOCIAL EQUITY



- Among the region's core counties, Miami-Dade has the highest rates of unemployment and poverty. These rates may be underestimated because of undocumented workers in the region.
- Poverty has been increasing in rapidly growing St. Lucie County, which increasingly serves as a bedroom community for low-wage service sector workers in the region.
- In Miami-Dade, Broward, and Palm Beach counties, almost half of the population has a household income below that needed to make housing affordable.

EDUCATION



- On an aggregate basis, school performance has been improving. Although three of the region's seven districts scored A, social disparities are manifested in individually low performing (D and F) schools, concentrated in areas with the highest percentage of students eligible for free or reduced cost lunch programs.
- The region's core counties also have graduation rates significantly lower than the state-wide average, especially among blacks and Hispanics.
- With respect to preparation for college, students in the region's core counties had higher SAT scores than the state average, but lower than the national average. SAT scores for Hispanics, and especially for blacks, were significantly lower than scores for white graduates in the region.
- Combined class and racial disparities in educational achievement present a challenge for the future competitiveness of South Florida's workforce, which is projected to be 44 percent Hispanic and 22 percent black by 2030.

CIVIC ENGAGEMENT



- Voter registration increased at a faster rate than the voting age population from 1996 to 2002. Voter turnout increased throughout most of the region as well, but especially in St. Lucie County.
- Youth felony and misdemeanor referrals declined in most of the region from 1999/2000 to 2003/04. Miami-Dade, which had the largest number of referrals in the region, had significant declines in both felonies and misdemeanors.

POPULATION CHANGES

South Florida's Population Growth

Rapid population growth continues to be the primary driver behind many of the challenges facing the region—from affordable housing, water supply, environmental degradation, traffic and congestion, to economic opportunity. In 2004, the seven-county region reached 5.9 million people—up from 5.5 million in 2000—accounting for a quarter of the state's 1.5 million new residents, a quarter of the state's growth, and a third of its total population.³

The region is projected to reach 8.4 million residents by 2030, retaining one-third share of the state's population. State and regional growth rates will be slower than in the past, but absolute numbers will make the state the third most populous in the nation by 2030. South Florida will continue to be the most populous region in the state, and Miami-Dade, Broward, and Palm Beach counties will continue to be the most populous counties in the state.⁴

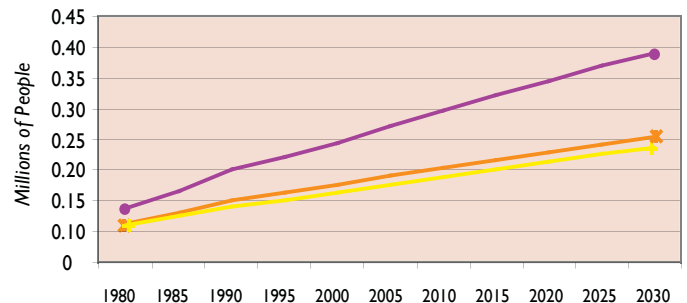
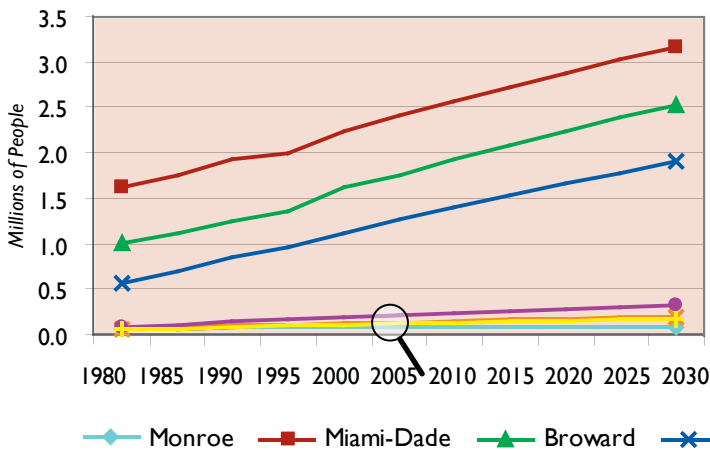
In 2004, the core counties were home to 5.4 million people, accounting for 90 percent of the region's population. The northern counties accommodated eight percent of its population.⁵ From July 2003 to July 2004, the core counties were among the nation's top 20 counties in terms of having the greatest number of new residents. St. Lucie County ranked 43rd in the nation.⁶ The region is projected to grow by 2.5 million by 2030, with the core counties continuing to house 90 percent of the population.

Though total populations are largest in the core counties, growth rates are highest in the northern counties. From 2000 to 2004, St. Lucie County had the highest rate of population growth at 17 percent, followed by Indian River, Palm Beach, Martin, Miami-Dade, Broward, and Monroe.⁷ From July 2003 to July 2004, St. Lucie County had the 18th highest growth rate in the nation. South Florida was also home to two of the fastest growing cities in the nation. During this period, the City of Port St. Lucie was the fastest growing municipality in the nation. Miramar, in Broward County, ranked eighth, with 5.3 percent growth.⁸ Through 2030, Palm Beach and St. Lucie counties are expected to grow most rapidly, followed by Indian River, Martin, Broward, Miami-Dade, and Monroe counties. However, by 2030, they are expected to have similar growth rates.⁹

Sources of Population Growth

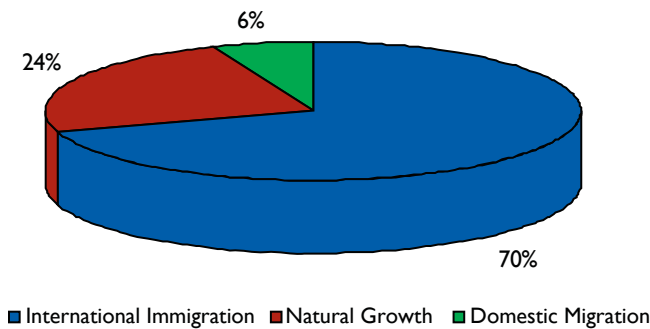
Florida has long been known as a preferred retirement destination. However, the reality is that South Florida's population growth has largely been the result of immigration from Latin America and the Caribbean, followed by natural increase (births minus deaths), and a small portion from domestic migration. From 2000 to 2004, international immigration had a stronger impact on growth in the region's southern counties than in the northern counties, accounting for most of the population growth in Monroe, Miami-Dade, and Broward counties. Domestic migration accounted for most of the population growth in Palm Beach, Martin, St. Lucie, and Indian River counties. While domestic migration accounted for a small part of Broward's growth, Miami-Dade saw negative net domestic migration, with 135,000 people leaving the county.¹⁰

South Florida's Population by County 1980-2030



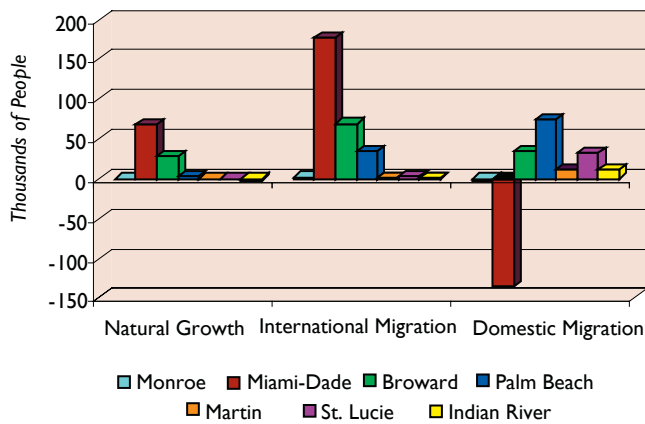
Focus on Treasure Coast

Origins of South Florida's Population Change 2000-2004



International immigration continues to be the most significant driver of population change, accounting for the vast majority of the region's population growth from 2000 to 2004.¹¹ However, natural increase accounted for almost a quarter of the regional population change from 2000 to 2004, up from one-fifth for the two-year period from 2000 to 2002. This emerging trend is most evident in the region's southern counties, especially Miami-Dade and Broward, and is partially the result of higher birth rates among Hispanics and this group's growing share of the population. In Broward County, births are projected to overtake immigration as the greatest source of population growth by 2020.¹²

Origins of Population Change by County 2000-2004

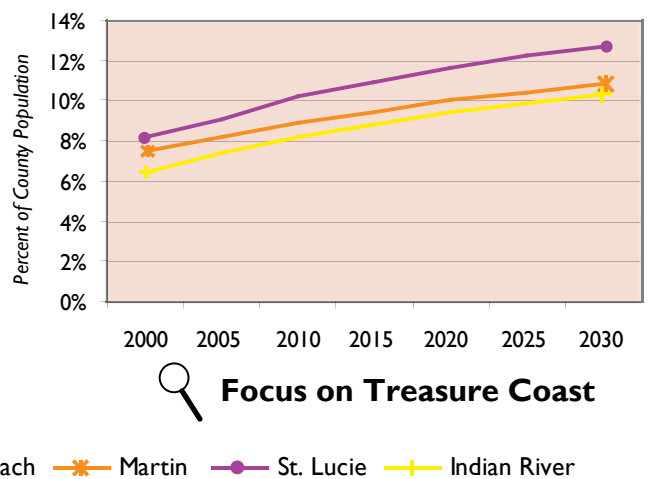
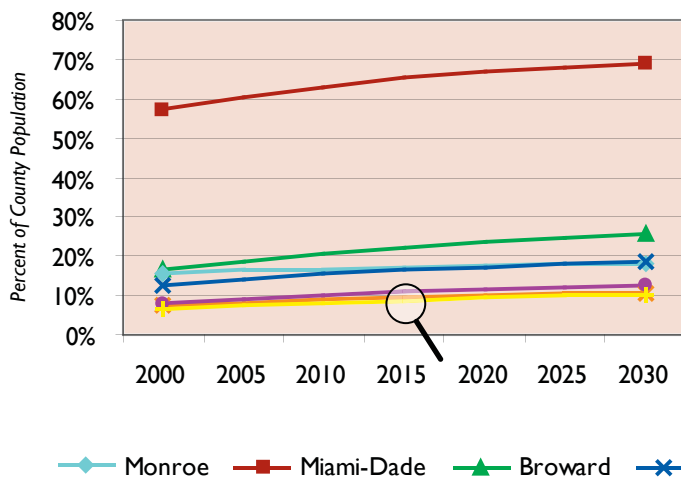


Racial and Ethnic Diversity: The Latinization of South Florida

Consistent with the influx of immigrants from Latin America and the Caribbean, South Florida has seen significant growth in its Hispanic community, mirroring the national trend. Hispanics accounted for a third of the region's population in 2003, projected to rise to 39 percent by 2030. Less change is apparent in the black population, accounting for 19 percent of the region's population in 2003 and becoming 21 percent by 2030. In sharp contrast, the non-Hispanic white population will decline from 46 percent of the region in 2003 to 37 percent by 2030, by which time Hispanics will have surpassed non-Hispanics in absolute numbers in South Florida.¹³

Within the region, Miami-Dade County will continue to have the largest Hispanic population. Currently, Hispanics account for about 60 percent of that county's population and this is projected to increase to 70 percent by

Hispanic Population by County 2000-2030

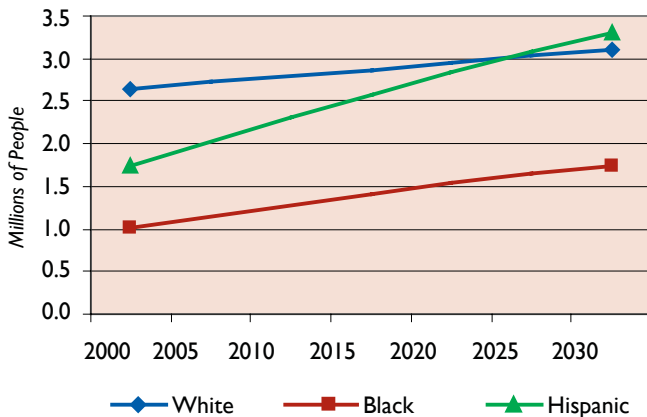


Focus on Treasure Coast



2030. To a lesser degree, growth in the number of Hispanics will occur across all South Florida counties as well. In Broward and St. Lucie counties, the black population is expected to remain slightly larger than the Hispanic population. Non-Hispanic whites are expected to retain the greatest proportion of the population in all but Miami-Dade County, although they will fall to less than 50 percent in Broward County.¹⁴

South Florida's Population Projections by Race and Ethnicity 2000-2030



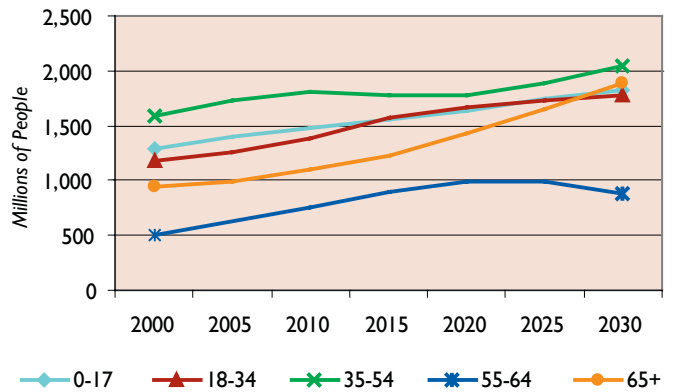
One component of the Hispanic population is unauthorized immigrants, most of which are from Latin America. According to the Pew Hispanic Center, the State of Florida was home to an estimated 850,000 unauthorized immigrants as of March 2004, nine percent of the U.S. total. Florida was third in the nation in absolute numbers, behind California and Texas. Unauthorized immigration has implications for the cost of education and health services, and for the job economy. Sixty-four percent of unauthorized immigrants in the U.S. are of working age

(18-64) and 35 percent are under 18. Nearly half do not have a high school education. They work in the lowest paying jobs, such as farming, cleaning, and construction, yet they fill the demand for labor in a country with a large population that is reaching retirement age.¹⁵

An Aging Population: Back to the Future

Throughout Florida, the senior population will have a much larger increase than the youth population over the next 25 years. The senior population is expected to increase from 2.9 million in 2003 to 6.3 million in 2030, and the youth population is expected to increase from 3.9 million to 5.3 million.¹⁶

Population Change by Age in South Florida 2000-2030



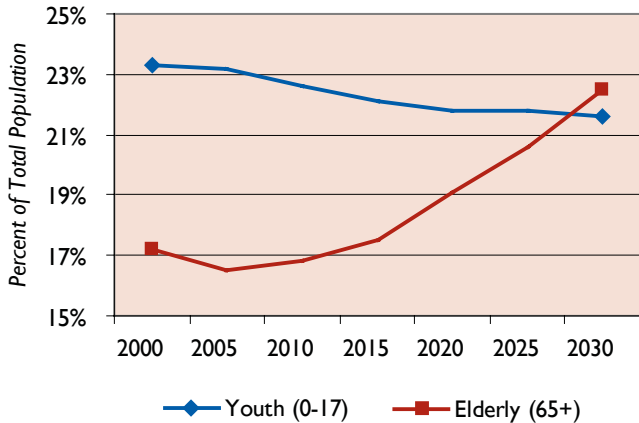
During the past decade, South Florida has seen a surge in the youth population under age 18; however, the future holds a resurgence of senior citizens over 65 years old. As Baby Boomers age, a rapidly growing senior population is expected to nearly equal the middle-age population by 2030 and slightly surpass the youth population. As it grows, the senior sector will significantly increase its proportion of the total regional population. By 2030, seniors will rise to 23 percent of the region's population.¹⁷ The youth share of the population will decrease slightly to 22 percent. With youths and seniors projected to be nearly equal, the region will be challenged to meet the healthcare needs of the elderly, along with the additional educational needs of youth.¹⁸

As both South Florida and the state experience larger numbers of seniors and a shrinking working-age population by 2030, the ability to attract legal immigrants may become increasingly important in supplying the workforce, in contrast to what Dr. William Frey of the Brookings Institution called the "slow-growing immigrant-starved states that will undergo 'extreme aging'."¹⁹



An emerging trend that will affect the culture, politics, and economy of the region is the difference in racial and ethnic composition among age groups. Young South Floridians are far more diverse than older residents, especially senior citizens. This trend is expected to continue for the next 25 years. By 2030, the number of black youths will increase slightly to 28 percent of the population, while the number of Hispanic children will increase substantially to 42 percent. Non-Hispanic whites will decrease sharply to 26 percent of the population.²⁰

Senior Citizen and Youth Populations in South Florida 2000-2030

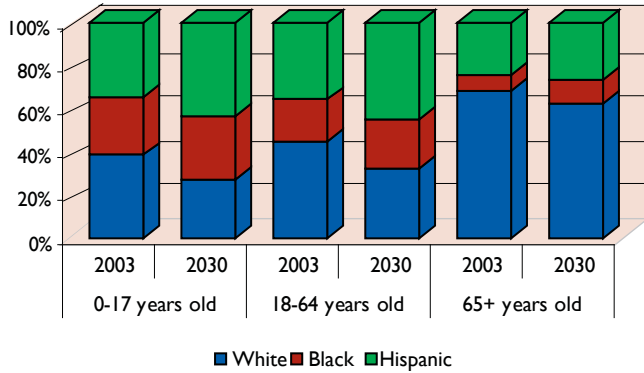


As Hispanic children age, the region will develop a more diverse working population (ages 18 to 64). In 2030, the working population is expected to be 31 percent white, 22 percent black, and 44 percent Hispanic.²¹ With Hispanics

composing nearly half of the working-age population and blacks nearly a quarter, it will be necessary to address the educational challenges faced by minority groups in the region in order to retain a skilled workforce during the next 25 years. By contrast, the senior citizen population is and will continue to be composed largely of non-Hispanic whites, though Hispanics and blacks will gain some share of the senior population.²²

Within ethnic and racial groups, age distributions are changing most significantly in the white population. Youth will comprise only 15 percent by 2030, the working age population 47 percent, and the senior population 37 percent by 2030.²³ With Hispanics dominating the youth and working-age groups, the region will likely become even more Hispanic in the years after 2030, changing the political dynamics of the region and further linking its economy to Latin America and the Caribbean.

Age Distribution in South Florida by Race and Ethnicity 2003 and 2030



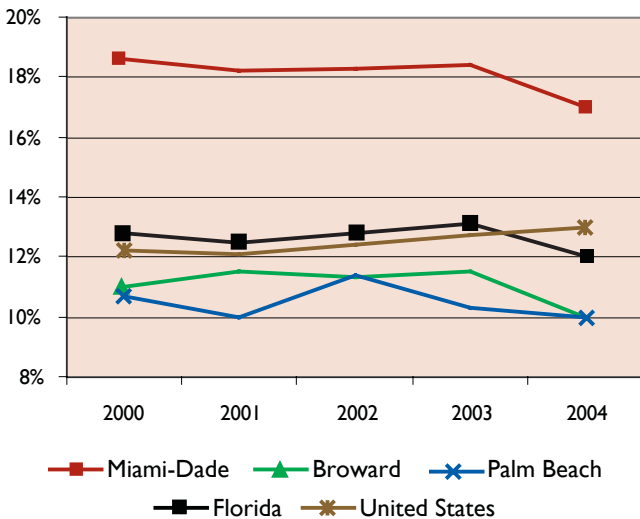
SOCIAL EQUITY

Poverty Rates

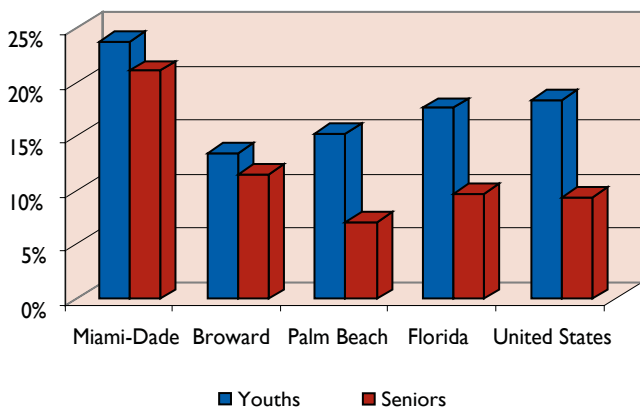
The poverty level is defined by the federal government and was set in 2003/04 as an annual household income of \$18,400 or less for a family of four. Poverty rates vary among the core counties of South Florida. In Broward and Palm Beach counties, they were below or comparable to the state and national rates from 2000 to 2004. However, Miami-Dade’s rate has been consistently higher.²⁴ In 2004, the City of Miami was the third poorest major city in the nation, up from fifth in 2003 and down from first in 2002.²⁵ In Miami-Dade County, poverty rates are higher among the most vulnerable populations—youth and senior citizens—with one quarter living in poverty.

In both Broward and Palm Beach counties, the poverty rate among youth is higher than that of the total population, but the rate for senior citizens is lower. Rates for these groups are much lower in Broward and Palm Beach counties than in Miami-Dade.²⁶

**Poverty Rates in South Florida
2000-2004**



**Poverty Rates among Youths and Seniors
2004**

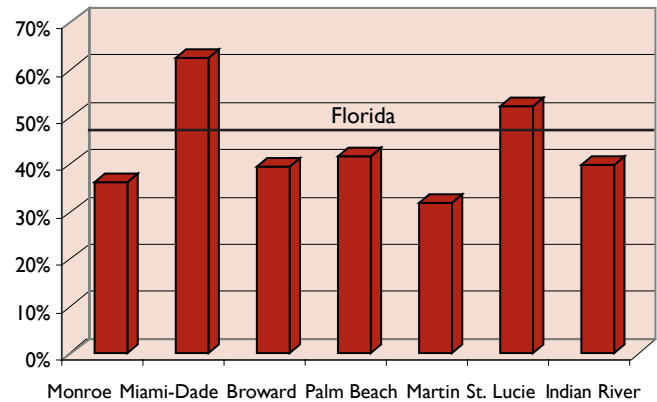


Students Receiving Free/Reduced School Lunch

Eligibility for free or reduced school lunch is often used as a surrogate measure for poverty that shows how many children live in households with very low incomes. The household income eligibility threshold is higher than that for poverty but represents an income at which a family will not be able to meet its needs without assistance.

The eligibility threshold for free lunch for a family of four in school year 2003/04 was an annual household income of \$23,920. For reduced lunch it was \$34,040. Statewide, 45 percent of students in pre-kindergarten through 12th grade received lunch benefits in 2003/04, up from 43 percent in 1994/95. Rates for most South Florida counties are below the state average of 45 percent. However, rates are higher in Miami-Dade and St. Lucie counties.²⁷

**Percent of Students Eligible for Free and Reduced Lunch
2003 and 2004**

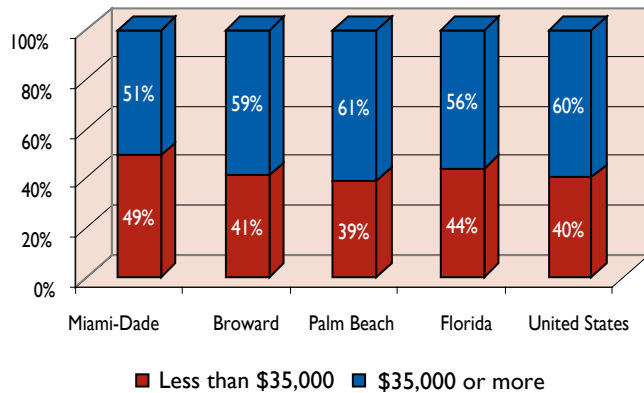


Household Income Distribution

Household income distribution is a measure of equity that shows how the region's wealth is shared among its residents. While the per capita income may indicate prosperity in a county, the distribution shows how many share in that prosperity. Within the region, almost one half of households had incomes of less than \$35,000 in 2003.²⁸ While only some of these households live at the federally defined poverty level, none of them has the income needed to afford a two-bedroom apartment at fair market rent, called the housing wage. In 2003, the housing wage was \$37,160 in Miami-Dade, \$39,920 in Broward, and \$35,920 in Palm Beach.²⁹ In the region, Miami-Dade has the highest proportion of households making less than \$35,000 annually and the lowest proportion making more than \$50,000. Palm Beach, on the other hand, has the lowest proportion of households making less than \$35,000 and the highest proportion making \$75,000 or more. The smallest part of the population is in the middle income bracket of \$35,000 to \$50,000.³⁰ Due to the high cost of living, this income does not have the same purchasing power in South Florida as in other areas of the state and nation.

There is great disparity in South Florida between the incomes of the wealthiest and the poorest residents, as well as geographic concentrations of wealth and poverty. An income gap exists between the suburbs and the central

**Distribution of Households by Household Income
2003**



cities, although the gap is decreasing. In 2000, the Miami Metropolitan Statistical Area (MSA) and the West Palm Beach MSA were among cities with the highest gaps between per capita income in the central cities and suburbs, ranking 14th and 16th nationally. However, that gap is decreasing. In Miami, one of four cities with the largest income gaps in 1990, the gap decreased by 11 points in 2000; West Palm Beach lowered its gap by two points.

Economic segregation is now prominent in the suburbs as well, with a large gap between wealthy and poor suburbs. The West Palm Beach/Boca Raton MSA has the greatest income gap in the nation between its wealthy and poor suburbs; the Miami MSA has the fourth largest gap. The West Palm Beach/Boca MSA is home not only to four of the 50 wealthiest suburban places in the country, but also to seven of the poorest suburban places, including the poorest, Belle Glade Camp. The Miami MSA is home to four of the 50 wealthiest suburban places in the nation, including the two wealthiest, Fisher Island and Indian Creek Village.³¹ It is also home to two of the 50 poorest places. Economic segregation siphons resources away



from poorer areas and significantly limits residents' opportunities. These areas fare poorly in job opportunities, health care services, schools, and municipal services.

K-12 EDUCATION

School Quality and Achievement

Florida educates one out of every 20 students in the nation, making the quality of a Florida education important to both the state and national economies.³² A good education system, along with a strong economy, can help close a widening gap between the wealthy and the poor and provide opportunities to achieve a good quality of life.

In 2004/05, South Florida educated about 900,000 students in 506 elementary schools, 128 middle schools, 111 high schools, and 100 charter or combination schools.³³ The ability of the region's educational institutions to prepare the local population to enter post-secondary school and to fill knowledge-based positions is crucial to overall economic competitiveness. "Labor force quality is directly related to economic growth and education is the strongest proven influence on the quality of the labor force" according to the Florida Taxwatch Center for Educational Performance & Accountability.³⁴

The Florida Comprehensive Assessment Test (FCAT) is used to measure student achievement and school quality. Each year Florida schools are given a letter grade that indicates the level of the school's performance. It is based on a combination of student performance in reading, writing, and math on the FCAT and students' progress from the prior year, especially those with the lowest scores.

In South Florida, since 2001/02, the number of A, B, and F schools increased while C and D schools decreased. From 2003/04 to 2004/05 there was a slight decline in C and D schools and an increase in A, B, and F schools. The recent increase in F schools may be due to the fact that writing standards were raised in 2004/05, and the learning gains of students with disabilities and limited English proficiency were included in school grade calculations for the first time.³⁵

The achievement of the entire school district is based on an aggregation of school scores. In the 2004/05 school year, three South Florida school districts were among the 15 districts in the state that received a grade of A. They are Palm Beach, Indian River, and Martin school dis-



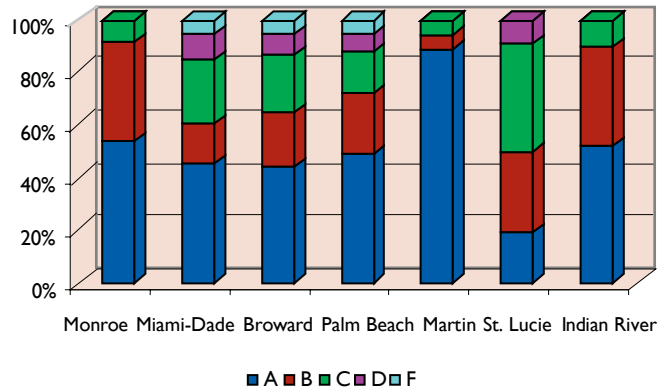
tricts. Palm Beach and Indian River both went from a B in 2003/04 to an A in 2004/05. Martin retained its A from the previous year and achieved the highest scores in the state in 2004/05. Monroe and Broward counties both retained a B from 2003/04 to 2004/05, and Miami-Dade went from a C to a B in the same period. Miami-Dade had the third largest increase in scores in the state. St. Lucie received a C, down from a B in 2003/04. In 2004/05, five out of the seven counties have a greater number of schools that improved since 2003/04 than declined. Only Broward and St. Lucie counties have more schools that fell a letter grade. In Miami-Dade, 80 schools improved, while only 46 declined.

Underperforming elementary schools are often located in areas with higher concentrations of poverty and among schools in which a large percentage of students are eligible for free or reduced lunch. In Miami-Dade County, 85 percent of D or F elementary schools have 90 percent or more of their students eligible for free or reduced lunch. Only 15 percent of A schools had 90 percent or more of their students eligible for the lunch program. In Broward County, 60 percent³⁶ of D and F schools had 90 percent lunch program eligibility, compared to 1 percent for A schools. In Palm Beach County, 33 percent of D and F schools had 90 percent lunch program eligibility, compared to three percent for A schools.³⁷

High School Completion

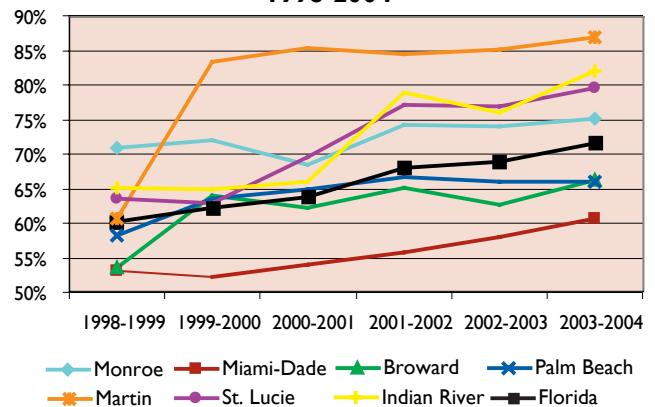
Rates of high school completion show that a large segment of South Florida youth do not reach adulthood with the education needed to compete among a skilled workforce. In the region's core counties, 2003/04 four-year graduation rates were well below the statewide average in Miami-Dade, Broward, and Palm Beach, a consistent trend since 1998/99. Martin, St. Lucie, and Indian River counties continued to have a higher rate than the state-

South Florida FCAT Grades by County 2004-2005

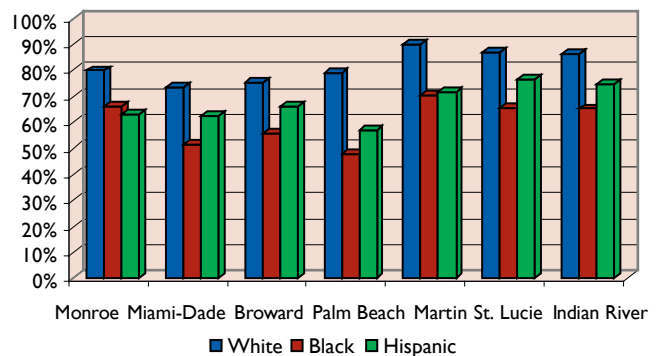


wide average. Although much of South Florida lags behind the state in four-year graduation rates, there has been progress in all seven counties during the past six years.³⁸ There are significant differences in graduation rates among South Florida's three major racial and ethnic groups. In all counties, white students have the highest graduation rates, black students have the lowest, and Hispanics are mid-range.³⁹

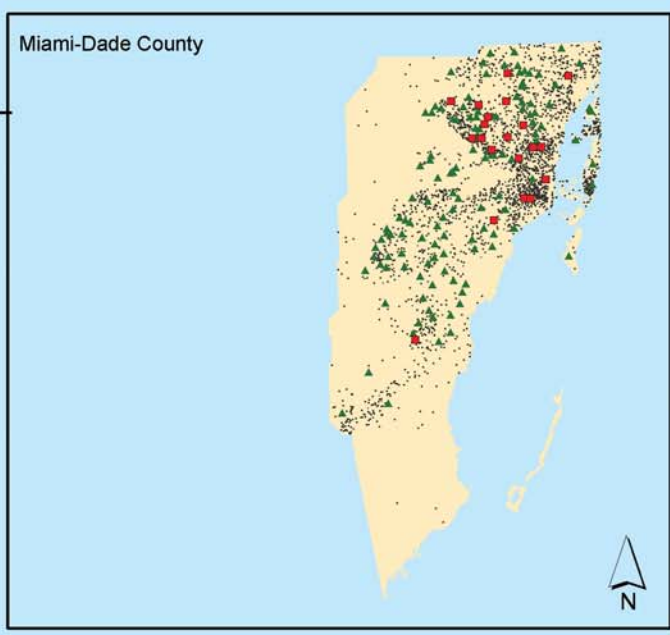
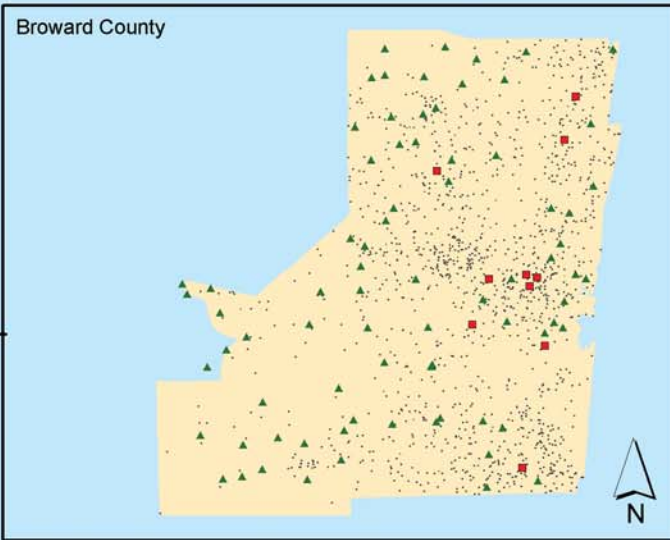
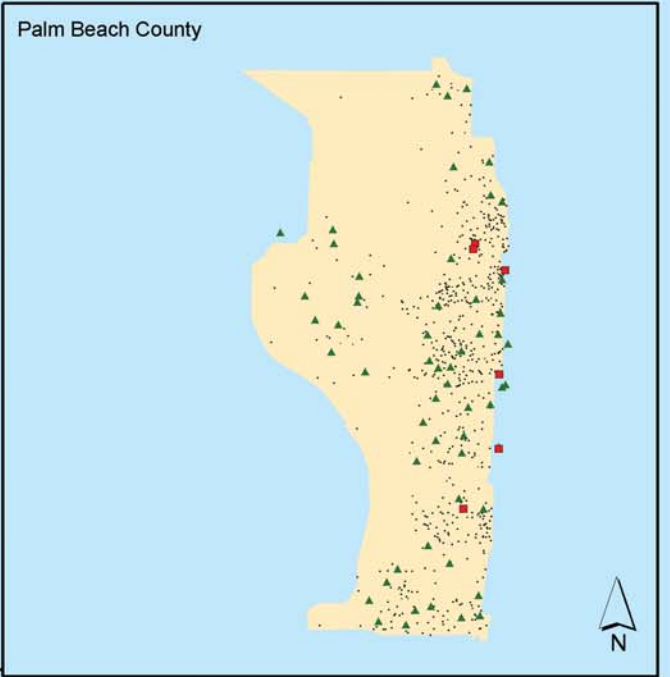
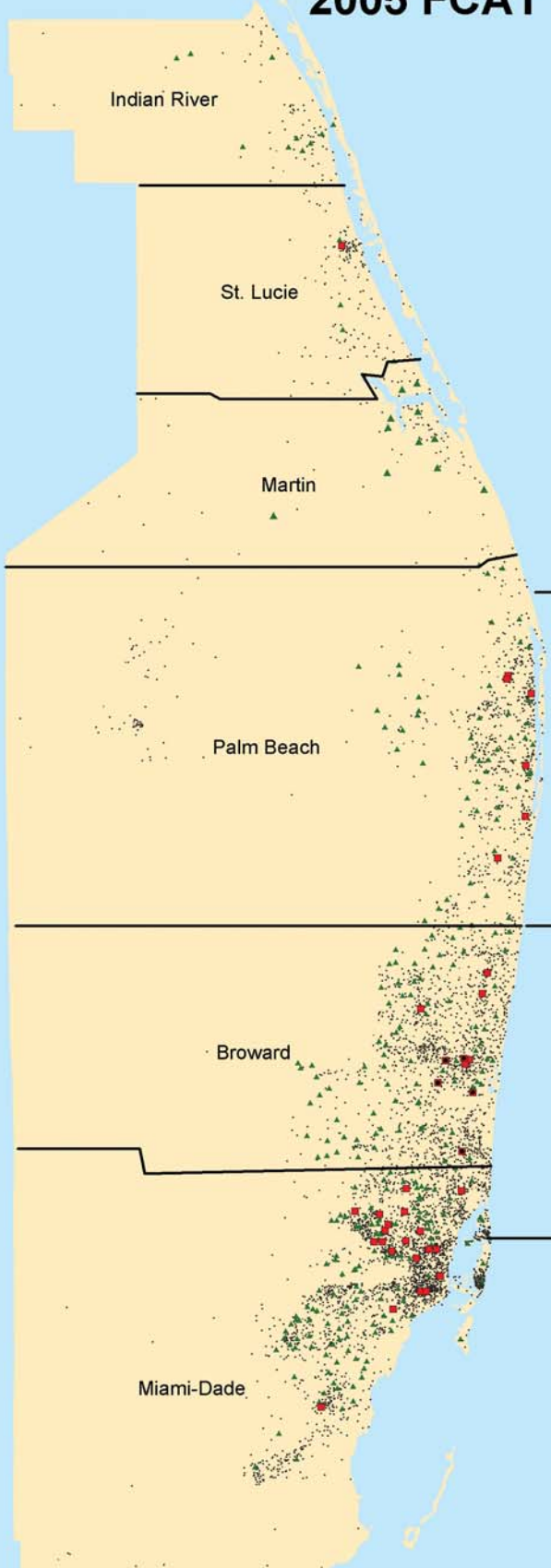
South Florida High School Graduation Rates 1998-2004



South Florida Graduation Rates by Race and Ethnicity 2003-2004



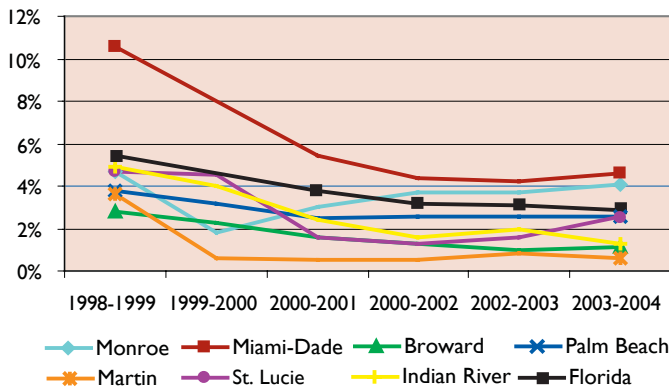
2005 FCAT Grades



- ▲ Elementary Schools Receiving 2005 FCAT Grade of 'A'
- Elementary Schools Receiving 2005 FCAT Grade of 'D' or 'F'
- Concentrations of Low Income Population (One dot is equal to 50 individuals)

On a positive note, South Florida is steadily decreasing its high school dropout rates, most significantly in Miami-Dade County. Only Miami-Dade and Monroe counties had higher rates than the state in 2003/04. Martin County continues to maintain the lowest dropout rate in Florida.⁴⁰ While dropout rates have been decreasing among all three major racial and ethnic groups, disparity does exist. In every county but Martin, dropout rates are highest among black youths and lowest among white youths. In Martin County, Hispanic youths have the highest dropout rates.⁴¹

South Florida High School Dropout Rates 1998-2004

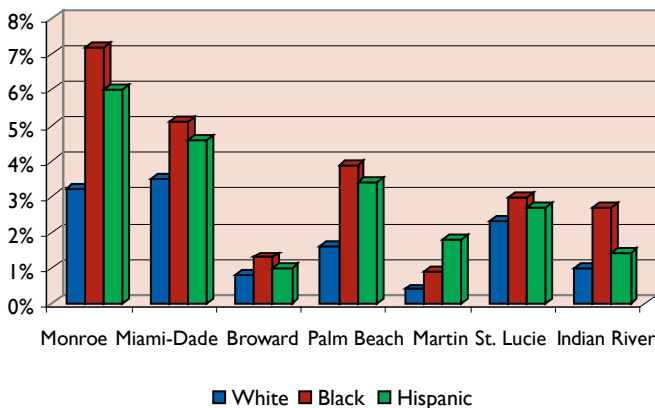


Martin and Indian River counties, South Florida’s SAT scores have consistently fallen below both state and national averages from 1997/98 to 2002/03.⁴²

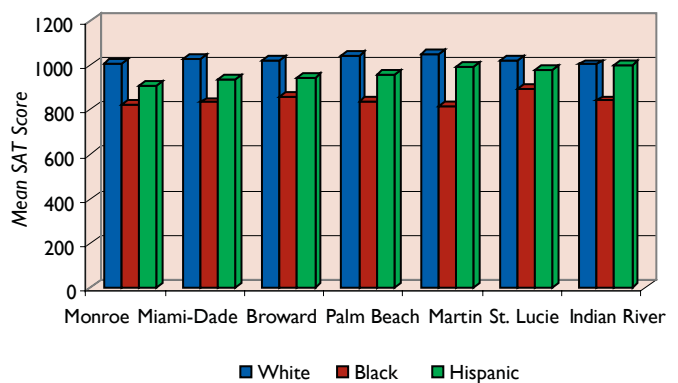
Within the region in 2002/03, Palm Beach, Martin, and Indian River counties had average SAT scores above 1000, higher than the state average but lower than the national average. The other four counties all fell below the state, with Miami-Dade and Broward trailing others in the region. Only Monroe, Palm Beach, and St. Lucie counties increased SAT scores between 1997 and 2003.⁴³

As with high school completion, there is also a performance gap on the SAT among white, black, and Hispanic test-takers. Since 1990, the average score of black test-takers in Florida has fallen nearly 200 points below the average score of white test-takers. Hispanic test-takers have consistently scored nearly 100 points below white test-takers. These ethnic groups show similar patterns throughout the region.⁴⁴ In addition, average scores among Hispanics vary according to the first language of the student. Statewide, those whose first language is English have consistently scored better than those who learned two languages at the same time and those who learned English as their second language. However, Hispanic SAT test-takers in Florida have consistently achieved higher average scores than Hispanics nationwide since 1990. White test-takers in Florida have lower average scores than white test-takers nationwide.⁴⁵

South Florida Dropout Rates by Race and Ethnicity 2003-2004



SAT Scores by Race and Ethnicity by County 2004



Academic Performance

High school students across the nation must take the Scholastic Aptitude Test (SAT) to be eligible for college admission, making it an important measure of college readiness and competitiveness. With the exception of

Educational Resources

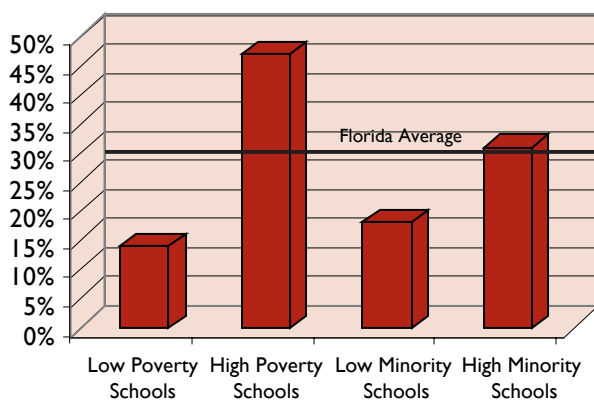
Educational resources, such as adequate funding and qualified teachers, are the foundation of a good education. However, Florida spends less on its students than most other states. It is consistently among the bottom ten

states in per student expenditures. In 2004/05, Florida's per student expenditure was \$7,040, 82 percent of the national average of \$8,554. Of the six most populous states in the U.S., Florida has the highest personal income per student but the lowest spending per pupil. The average annual teacher salary ranks 32nd among the states.

Florida ranks eighth in the nation in rates of disadvantaged students. Disadvantaged students, which include students in poverty, non-English-speaking students, and exceptional education students, are more costly to educate. The number of students in Limited English Proficiency programs more than doubled from 1992/93 to 2001/02. Minority student enrollment has increased by 172 percent since 1976. Total public school enrollment increased by 70 percent, while program enrollment in exceptional student education programs increased 172 percent between 1983/84 and 2002/03.⁴⁶

Despite the prevalence of minority and poor students in Florida and in South Florida, there is disparity in the resources of high- and low-minority schools and high- and low-poverty schools. One measure of disparity is the quality of teachers, based on their qualifications in the subject area taught. In Florida, where minority students lag behind on SAT scores, teachers without a major or minor in their subject area are more prevalent in high-poverty schools and high-minority schools. Almost half lack subject area credentials in high-poverty schools, compared to 15 percent in low-poverty schools. In high-minority schools, 30 percent lack a degree in their field, compared to 18 percent in low-minority schools. In addition, Florida is one of only 13 states that do not provide additional funding for students living below the poverty level.⁴⁷ This is especially critical considering their importance to the economic future of the state.

Florida Secondary Teachers Lacking Major or Minor in Subject Area 1990-2000



South Florida is highly representative of the challenges that Florida faces in educating its youth. With a large minority population, it is a major point of entry for immigrants who may not speak English. Furthermore, it is the site of one of the poorest cities in the nation, Miami. Additional resources are needed to educate South Florida's diverse population for the future. Yet four counties—Monroe, Miami-Dade, Broward, and Palm Beach—have lost money under the new funding formula enacted by the state legislature in 2004. It is estimated that these counties have already lost \$60 million and will lose another \$90 million in 2006 and \$150 million in 2007. The region's school districts claim that the new wage-based formula gives other counties a competitive edge in the hiring of teachers.⁴⁸

HIGHER EDUCATION

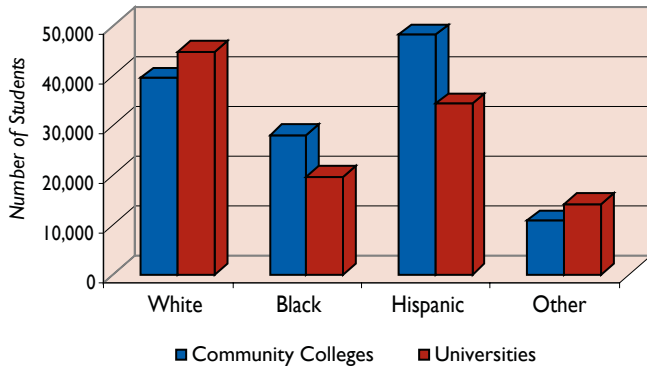
College Enrollment

Post-secondary education is also a critical element in the quality of South Florida's workforce. According to the Florida Taxwatch Center for Educational Performance & Accountability, "Through 2010, nine of the top ten fastest growing jobs in Florida will require an associate's degree or a postsecondary vocational certificate."⁴⁹ In South Florida, 64 percent of 2002/03 high school graduates went on to post-secondary school at an in-state institution, compared to 60 percent statewide. In Monroe, Miami-Dade, Broward, and Martin counties, rates are just above the regional average.⁵⁰ In Palm Beach, St. Lucie, and Indian River counties, they are comparable to the state.⁵¹

Among students who attend post-secondary school in Florida, there is a gap in continuing education rates between white, black, and Hispanic students. In the core counties, which comprise 90 percent of the region's students, continuing education rates among white students led those of black and Hispanic students.⁵²

In 2004/05, South Florida colleges enrolled 239,429 students; 127,000 attended one of the region's five community colleges, and 113,000 attended one of its universities.⁵³ Within the public universities, about 16 percent of students were enrolled in graduate and professional programs. At the private universities, graduate enrollment reached almost 35 percent at the University of Miami and 77 percent at Nova Southeastern University. Blacks and Hispanics were more likely to attend community colleges, while whites were more likely to attend universities.⁵⁴

**Students Enrolled in South Florida Colleges
2004-2005**



To increase workforce education, it is optimal that local students return home after college or stay in the region to attend college. Data is not available to determine how many college students come from South Florida or how many will use their education within the region after graduating, but residency statistics give some indication. In the region’s two public universities (Florida Atlantic University and Florida International University), in-state residents comprise over 90 percent of the student body, most of whom are from South Florida.⁵⁵ In the two largest private universities (University of Miami and Nova Southeastern University), between 50 and 60 percent of students are Florida residents. It is not possible to determine how many students in the private universities come from the region, but students from Miami-Dade and Broward counties constitute 37 percent of total enrollment at the University of Miami.⁵⁶ The consortium of universities that will center around Scripps has the potential to increase regional enrollment in the field of biotechnology.

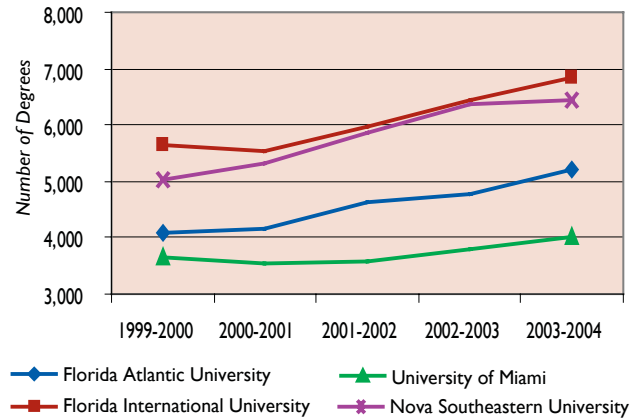
College Completion

South Florida’s five community colleges graduated 14,000 people in 2003/04, with either Associate of Arts or Associate of Science degrees or vocational and technical certificates.⁵⁷ Thirty-nine percent of graduates were white, 18 percent were black, and 33 percent were Hispanic.⁵⁸ South Florida universities have been increasing the number of degrees awarded. In 2003/04, four South Florida universities⁵⁹ awarded 22,500 degrees, up from 18,400 in 1999/2000. The two public universities drew more than 85 percent of their students from the region and awarded 12,000 of the degrees conferred in 2003/04.⁶⁰

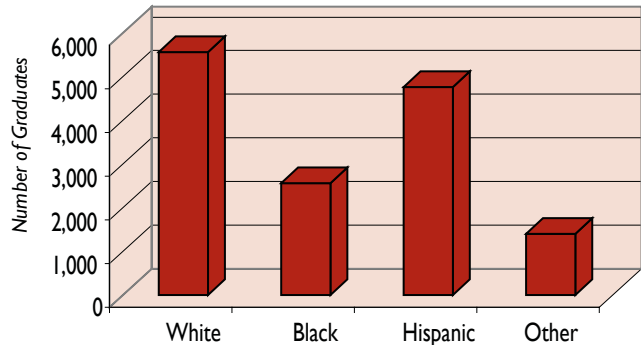
College graduation rates are lower in South Florida’s public universities than in the other state universities examined by the Florida Department of Education.⁶¹ Florida Atlantic University has the lowest graduation rate. Florida

International University’s graduation rate is lower than the state average and ranks sixth among the ten universities ranked. This is not favorable for an educated regional workforce, considering the large proportion of FAU and FIU students who originate from South Florida.⁶²

**Degrees Awarded at Select South Florida Universities
2000-2004**



**South Florida Community College Graduates
by Race and Ethnicity
2003-2004**



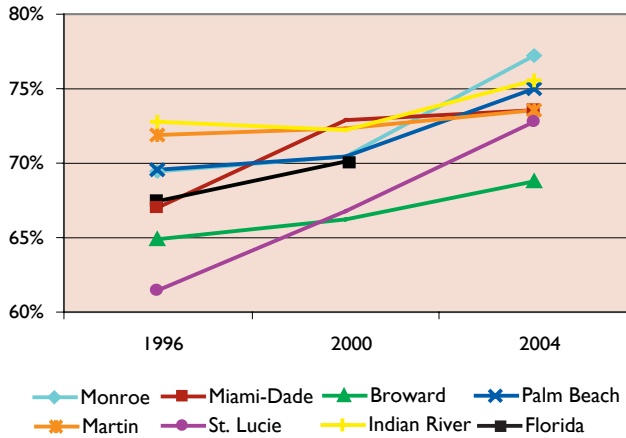
CIVIC ENGAGEMENT

Voter Participation

Civic engagement refers to citizen participation in their communities and governments. It is an important component of social capital, the connection among individuals based on trust, and shared goals and values. Civic engagement is an important factor in building strong communities and bringing about social change.

Voter participation measures conventional political engagement. It reflects confidence in political systems, concern about the fate of the community, and feelings of

Voter Turnout in Presidential Elections 1996-2004



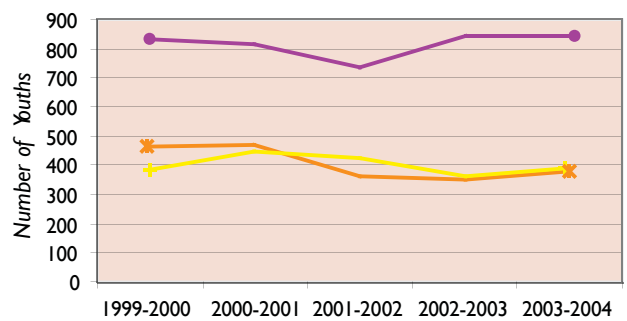
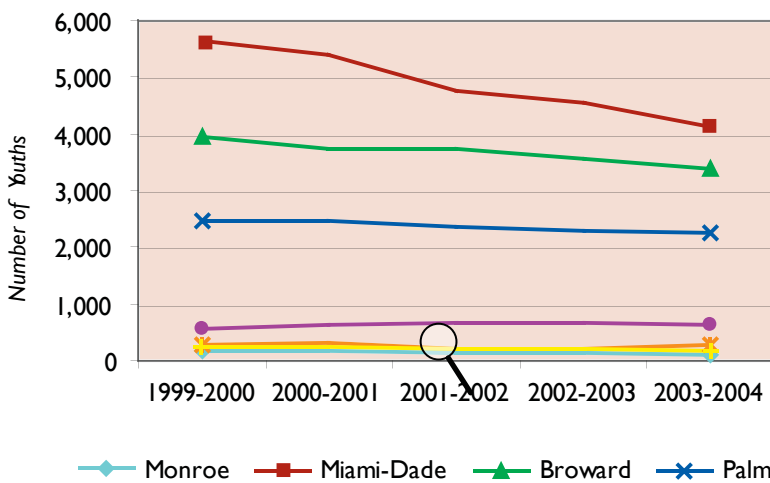
empowerment. Voter registration increased 17 percent from 1996 to 2002, while the voting population increased 14 percent. Registered voters increased from 68 percent of the voting age population in 1996 to 70 percent in 2002. Voter turnout increased throughout most of the region as well. For presidential election years, every county increased its turnout rates from 1996 to 2004. This was most significant in St. Lucie County, where voter turnout increased 11 percentage points from 1996 to 2004, although it remains below the rate of other counties in the region. Voter turnout also increased in non-presidential election years in every county except Broward. Again, St. Lucie County had the largest increase. Increases in registration and turnout were greater from 2000 to 2004 than from 1996 to 2000, possibly due to the national attention that South Florida received in the 2000 election.⁶³



Youth Offenders

Feelings of safety can promote a sense of community while crime and the fear of crime can undermine that sense. Juvenile delinquency, as measured by the number of youths referred for committing crimes, is one measure of the present disengagement of youth and the future of civic engagement. Felony referrals declined in five of the seven counties in the region from 1999/2000 to 2003/04. Miami-Dade, which had the largest number of referrals in the region, declined 27 percent.⁶⁴ Though the number of referrals in St. Lucie County is small,⁶⁵ the county had the largest increase at 11 percent, a challenge facing many rapidly growing areas. Trends were mixed for misdemeanor referrals. Only two counties showed a decrease in the number of referrals from 1999/2000 to 2003/04. The largest county, Miami-Dade, had a significant decline in misdemeanor referrals—a 36 percent decrease during that timeframe. Martin also had a 17 percent decline.⁶⁶

Youths Referred for Felonies 2000-2004



Focus on Treasure Coast

FLORIDA REGIONAL HIGHLIGHTS



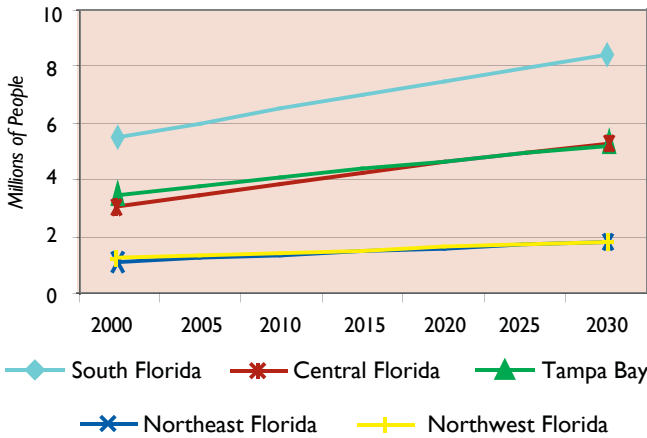
Florida is fast becoming the third largest state, and comparable demographic changes are occurring across all of its regions. While South Florida remains a mecca for Hispanics, this trend is also being experienced in other areas of the state. Further, the aging population is impacting other regions, some even moreso than South Florida. Education and equity issues remain at the forefront as the state grapples with the array of demographic changes.

POPULATION CHANGES

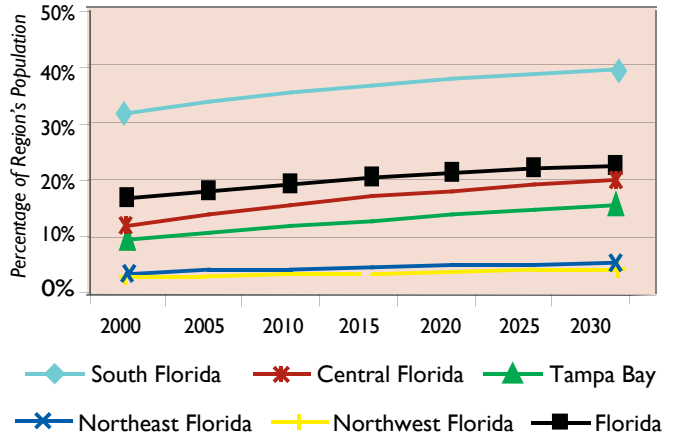
The regions of Florida will retain their shares of the state population from 2004 through 2030. South Florida will continue to have one-third of the population. Central Florida and Tampa Bay will each have about one-fifth, and Northeast and Northwest Florida will each continue to have about seven percent.

Growth rates will be slower than they have been historically, but absolute numbers make the state one of the most populous in the nation, with South Florida home to the most populous counties in the state—Miami-Dade, Broward, and Palm Beach counties. Hispanics will continue to thrive in South Florida. The state’s other regions will also see significant increases in their Hispanic populations, though perhaps not as dramatically as in South Florida.

Population Projections for Florida's Regions 2000-2030



Hispanic Population in Florida's Regions 2000-2030



Throughout Florida, seniors will gain in population share, and the youth population will lose its share of the total. Seniors are expected to increase 114 percent, from 2.9 million in 2003 to 6.3 million in 2030, while youths are expected to increase only 37 percent, from 3.9 million to 5.3 million in the same period. In both South and Central Florida, seniors and youths will comprise comparable shares of the population. Seniors will dominate in Tampa Bay, while youths will dominate in Northeast Florida.

EDUCATION

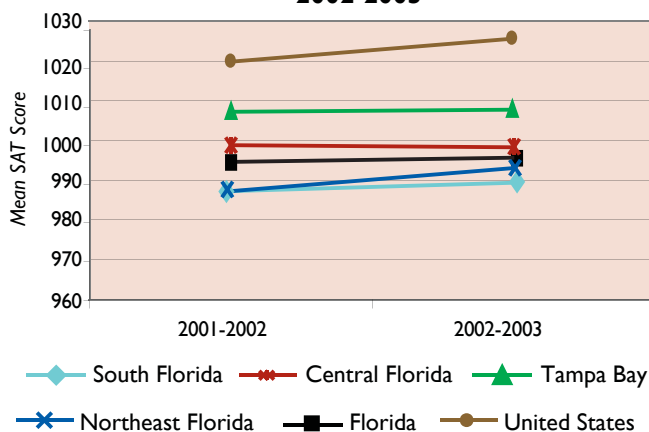
Education is a priority for the state and the nation. In the world of global competition, it is critical for preparing the workers of tomorrow. Unfortunately, Florida has not been a leader on this important issue, although it is improving. With regard to the regions of the state, major metropolitan areas were compared on high school graduation and dropout rates, as well as on national test scores.

Florida's statewide graduation rate is 72 percent, compared to rates in key metropolitan areas that vary considerably. Exceeding the state rate are Hillsborough County at 79 percent and Orange County at 73 percent. Those counties lagging the state average are Escambia at 71 percent and Duval at 67 percent, Palm Beach and Broward at 66 percent, trailed by Miami-Dade at 61 percent. Florida has a statewide dropout rate of three percent. Duval and Miami-Dade exceed the state rate, with a five percent dropout rate. Other counties rank at or below the state rate—Palm Beach and Orange at three percent, Hillsborough and Escambia at two percent, and Broward at one percent. The southern counties and Duval County are lagging the state on these two measures of educational performance while Central Florida is leading the regions.

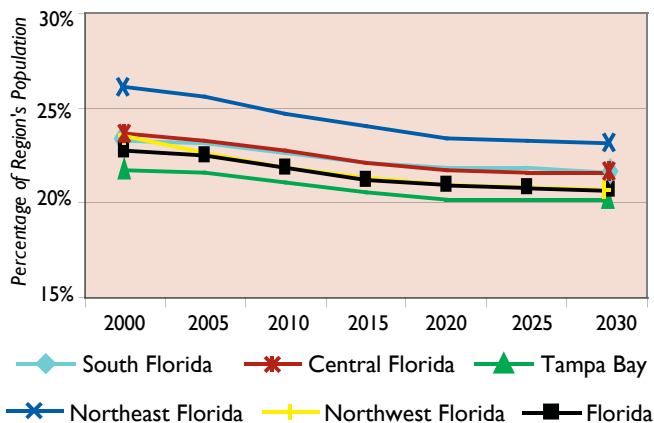
SAT scores of Florida's students are significantly lower than the national average. South Florida ranks lowest among the major regions in Florida and below the state average. However, increases over the two-year period from 2002 to 2003 were greater in South Florida and Northeast Florida. While there are no future projections of this trend, education scores clearly need to improve to make Florida more competitive with other parts of the nation.



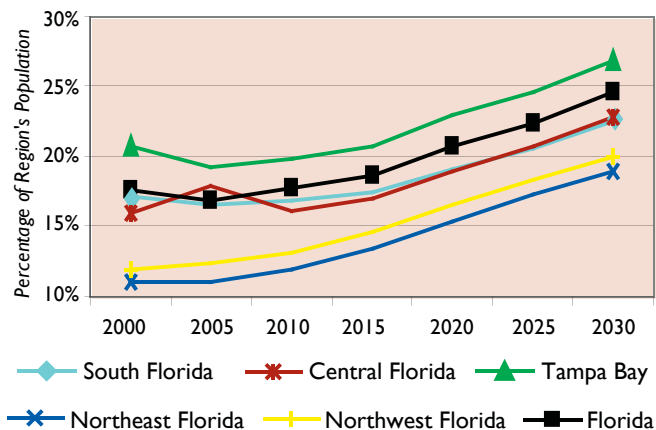
Regional, State, and National SAT Scores 2002-2003



Projected Youth (Ages 0-17) in Florida's Regions 2000-2030



Projected Senior Citizens in Florida's Regions 2000-2030



COMMENTARY FROM THE EXPERTS



**Dr. Dario Moreno, Director
Metropolitan Center
Florida International University**

Past 20 years. The single most important change has been the empowerment of the South Florida community, both economically and politically. Most of the Hispanics coming to Florida are middle class, which is a different Hispanic population than what you see in California or New York. With the importance of social issues added to that, what you see in Florida is a very dynamic Hispanic population with very substantial issues of partisanship.

This is redefining for the rest of the country what a Hispanic is—a Hispanic is no longer viewed as necessarily working class or poor. South Florida has shown that the Hispanic population can be a professional, rising middle class population. These trends are not only important for Florida, but for the rest of the country in terms of our perception of what it is to be Hispanic in the U.S.

Next 20 years. I think diversity is making Miami a world class city, a truly international city. One of the important demographic trends is the black population of Miami-Dade County moving to Broward. They are driven to Broward by being able to buy more house for the money, a perception that the school system is better, and a view that Miami-Dade County is going to be increasingly Hispanic. I think we were wrong in the perception that Broward will be increasingly Hispanic. I think the western part of Broward will see the continuing Hispanics, but farther north of that (Treasure Coast), you are going to have increases based on how low the population is there. Palm Beach County will see more Hispanics move in.

In terms of the creative class that is coming in, especially to Miami-Dade and Broward counties, these people are really changing that age cohort difference. Surely there is an aging population and their age is growing, but the dynamism is looking at who is moving into the luxury buildings and going to the night spots. I think what drives South Florida is part-time residents; they have a tremendous impact on our economy.

What needs to be done. The fact is that people here (in Miami-Dade) have figured out how we can all prosper together. We face challenges in affordable housing, an aging population, health care, and transportation, but we

also have a booming economy, a vision of how the city and county should look. Concerns that have been long ignored in terms of environment, issues of social equity and prosperity are being taken, and we are discussing them now. These changes are incredibly positive. Are we still a young region that has a long way to go? Sure, but at the end of the day, I am optimistic. All the heavy lifting has been done in terms of the old tensions that have haunted Miami-Dade County: ethnic, economic, political.

I see a more vertical South Florida, especially in the two southern counties. I see the great environmental challenges as the population grows and the elected officials are willing to continue to move the urban development boundary west and south. I see the development of South Dade as the last frontier. I see institutions continuing to be challenged.



**Daniella Levine
Executive Director and Founder
Human Services Coalition**

Past 20 years. In the 23 years that I have lived in South Florida, I have seen the arrival of many different groups. Miami, in particular, has become one of the most international cities in the world, with 60 percent foreign born. Many of the people who were uncomfortable with that change have left, so most of those who are here are comfortable with and embrace internationalization and diversity.

All these waves of immigration have had a depressing effect on wages. Miami-Dade has a low salary scale, not just in the service industry, but also for professionals. With Miami remaining a mecca for the affluent, there is a growing Balkanization between the affluent and a small, middle, and growing underclass.

Next 20 years. We are at a turning point, and I think that we could go in two different directions. We could move toward increased Balkanization in terms of class divisions, or we could move toward becoming a place that is far more cosmopolitan by embracing our cross-cultural diversity and our agility in dealing with change. Which path we go down will depend on a lot of things, but three are especially important—education, housing, and civic investment. We are doomed economically to a second-rate status unless we have an educated population to bolster our competitiveness as a creative economy, and support

our retiring population. The benefits of increased wages will be wiped out unless we can do something to stabilize our housing crisis. The current speculative bubble has created a huge gap between wages and housing costs, making us the community with the highest housing burden in the nation. People are being pushed out of the market with no place to go.

What needs to be done. There is a need for coalition building across the sectors (public, private, and nonprofit) to address these large challenges. We are a region where people and organizations have typically worked independently. Essentially what we are trying to do with Imagine Miami is to identify a common vision for the future of the region that will reactivate civic spirit and create a strong commitment to this extraordinary place.

Because things have been changing so rapidly, we don't have clearly established civic leadership. That's a challenge as well as a huge opportunity. I believe that Miami is the place where diversity will fuel a new model of civic engagement that celebrates difference, vitality, and community resilience in the face of constant change.



**Carolyn Dekle, Executive Director
South Florida Regional
Planning Council**

Past 20 years. Internationalization has been a driving force in the region. Anytime there is a change in a Latin American government or policy, it affects the population here. The region has experienced a great deal of change and continues to evolve because of South Florida's connection to and relationship with Latin America and the Caribbean. Miami-Dade County has had a large Cuban-American community since the late 50s and early 60s, and the region's population continues to diversify due to immigration from the Caribbean and Latin America, as well as other parts of the world.

There is a great disparity in incomes and wealth in the region. As the cost of living continues to increase at a faster rate than income, it will become more challenging for the less affluent, including many in the "middle class," to live and prosper in South Florida. But there is also a lot of money moving around that is not fully quantified or understood. There are a lot of people with second or third jobs on the side, and a lot of money moves out of the region to other countries. Many people come here in search of a better quality of life because they are unable to make a living in the countries they are from and/or they are

concerned with the political climate in their countries. Many support their family members back home with the income they earn here and products, such as clothing and medicine, they ship overseas.

South Florida's population is older than the rest of the nation, but it is getting older more slowly now. The region's population is growing younger, and many of the older communities that we typically associate with large retirement populations are revisiting their schools and public services to meet the needs of new families with children. I think South Florida's retirement population will begin to shift to other areas of the state and country because of the high cost of living in the region, coupled with retirement plans that are less generous than they have been in the past. Today, fewer and fewer industries are able to offer and support a defined benefit retirement plan. South Florida will become less attractive to persons on a fixed or limited income. As these types of benefits decrease, the economy of Florida, at one time highly dependent on transfer payments, will change as well.

You get a wider range of choices through public schools than private schools. I know a lot of affluent families who choose to place their children in the public school system because they are able to offer a broader range of programs. Of course, there are also instances where a public school can improve. Accountability is important but we cannot lose sight of the state's responsibility to ensure that there are adequate state and local resources available to support our schools, teachers, and support staff, and children who may require additional assistance or support. We also need to be innovative and adapt if we are going to address the changing needs of our communities.

What needs to be done. We are the heart of an international region and the heart of a domestic region. That is a big challenge for all of us who work here professionally. If you do not have an intuitive sense about the people for whom you are providing services, it is hard to know what to do. In the next ten years, this will be one of our big challenges. We're going to have to figure out how to conduct "regional conversations." We need to figure out how to discuss shared concerns from different parts of the region. It will not surprise me to see in ten years a regional decision-making process. I think there is political acceptance for the need for that. But what will be essential in getting there is to reach agreement on what are the regional issues, as opposed to local, and decisions that need to be made.

Place

Bounded by the ocean on one side and the Everglades on the other, land for human settlement has now become a scarce resource, contributing to escalating housing costs that many residents cannot afford. Over the past several decades, new growth has been accommodated in large-scale communities built at ever lower densities. In addition, traffic congestion has increased with the population, polluting the environment and causing massive delays for commuters. It will be difficult, if not impossible, to sustain that pattern of development as 2.5 million more people are added to the region. The challenge of growth will come not only from increasingly limited supplies of available land, but also from the cost of providing both new and existing development with adequate infrastructure.

Sustainable development requires that population growth be accommodated in ways that enhance, not degrade, the natural and built environments for future generations. South Florida boasts a richly diverse but fragile natural environment that includes the only subtropical ecological community in the continental United States. Over the last 55 years—a period during which the region’s population exploded from 764,000 to almost six million—the vast wetlands in the heart of the region were reduced by more than a third. Habitat for tens of millions of birds and other species has disappeared, and the natural restorative capacity of the underlying aquifers that supply water has been compromised. Only by altering aspects of the region’s natural environment have land, water, and other natural amenities been made available to support the current population. Are these practices sustainable as the region expands by another 2.5 million people in only a quarter of a century?

WATER SUPPLY



- The state has put new and expanded water storage projects (Acceler8) on a fast track for completion by 2010, helping to ensure adequate future water supplies.
- Currently used, inexpensive sources of water are reaching their limit. However, the demand for water will outpace population growth through 2025.
- As Everglades restoration proceeds, the region’s urban areas cannot continue without significant water reuse. Unfortunately, the most populous counties in the state, Miami-Dade and Broward, are not using alternative water supplies, have not implemented sufficient reuse programs, and have the lowest per capita water reuse in the region. The northern counties, especially Palm Beach, Martin, and St. Lucie counties, are models for the rest of the region with much higher per capita water reuse.

ENVIRONMENT



- The State of Florida, along with federal and local partners, has acquired 56 percent of the land currently needed for water projects and 99 percent of the land needed for habitat restoration.
- Nesting wading birds in the Everglades ecosystem have increased significantly since 1999. However, because of the high waters caused by the 2004 hurricane season, not all of the bird species met the targets in 2005.
- Critical beach erosion, which threatens land for development, recreation, and wildlife habitats, has been increasing, due in part to significant hurricane activity.



HOUSING



- The region's housing market has been one of the nation's top performers in terms of the overall value of sales. But residents are being priced out of the housing market with median prices of single family homes reaching almost \$400,000 in July 2005. Median prices in the Treasure Coast are not as high but have increased rapidly over the last several years.
- Throughout the region, there are large gaps between the income needed to afford a home at the median price and the income of workers in traditional occupations. The rental market has also become increasingly tight, and the percentage of renters unable to afford fair market rent has been on the rise since the late 1990s.

MOBILITY



- The annual delay per driver increased 31 percent from 1993 to 2003, and congestion costs rose 70 percent. The overall number of vehicle miles traveled per household continues to climb as the result of sprawl-type development, which requires people to use their cars for almost everything.
- The use of public transit has been mixed over the past decade, with only a slight overall increase. However, the Regional Transportation Authority is in the process of double-tracking Tri-Rail, thereby decreasing the time between trains from one hour to 20 minutes, and train schedules are being coordinated with buses, showing some signs of hope for consumers.

THE NATURAL ENVIRONMENT

Restoring the South Florida Ecosystem

A dike was built around Lake Okeechobee after a devastating hurricane in 1928. About 30 years later, the Army Corps of Engineers was authorized to design the Central and Southern Florida Flood Control Project to help protect the region from flooding and assure the supply of water for urban and agricultural uses. While the projects have been successful in meeting these needs, they have significantly altered the natural hydrology (timing, quantity and distribution of water) in the region, compromising the quality and quantity of the water, as well as the habitats of numerous species.

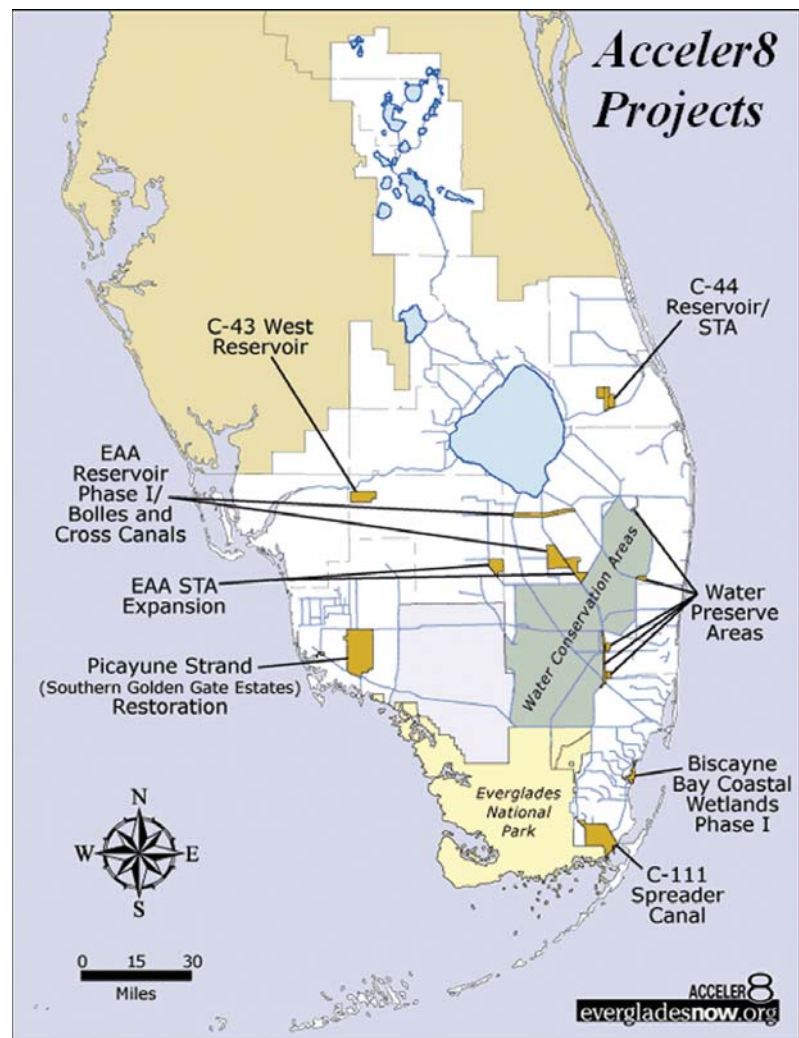
In 2000, Congress authorized the \$8.5 billion Comprehensive Everglades Restoration Plan (CERP) as part of the Water Resource Development Act of 2000 to help improve water quality and assure future water supply, while recovering some of the original ecology of the Everglades. The project, which aims to store, treat, and use excess water rather than letting it run out into the ocean, is in the beginning stages of implementation and will be executed over the next 45 years. Projects already underway are expected to provide 261,400 acre-feet of water storage and 4,000 acres of stormwater treatment area. They will also restore the quantity, quality, timing, and distribution of freshwater flow to the Manatee Bay and Barnes Sound estuarine systems and restore wetlands and habitats. The state and the South Florida Water Management District (SFWMD) have created the Acceler8 plan, which will provide \$1.5 billion to advance CERP projects. Eight restoration projects are expected to be completed by 2010, a decade ahead of schedule, and six of these projects are in South Florida.¹

Other proposed projects seek to provide additional water storage, restore wetlands, and restore freshwater flow to Biscayne Bay and Biscayne National Park in the southern part of the region and to the Indian River Lagoon and St. Lucie Estuary in the north.² However, authorization of \$1.2 billion to save the St. Lucie Estuary and the Indian River Lagoon, vital components of restoration, has stalled in Congress as

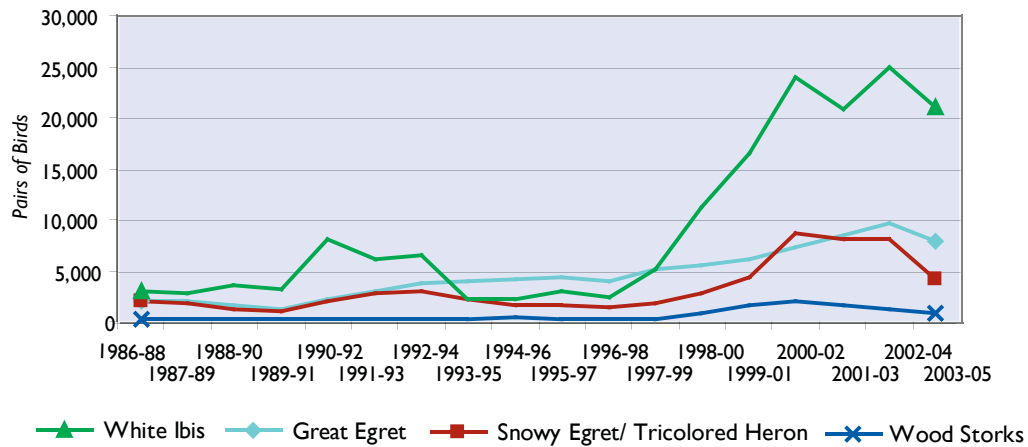
other important issues compete for federal dollars. Overall, environmentalists credit the restoration effort for coordinating and funding scientific research, but say it has fallen behind in the completion of important projects.³

Land Acquisition

Land acquisition plays a central role in restoring the ecosystem. Land is needed for water storage and treatment areas, aquifer recharge areas, wildlife habitat, and as a buffer between the built and natural environments. As of December 2004, the State of Florida, along with federal and local partners, had identified 483,805 acres to be acquired specifically for water projects, over half of which have already been acquired. They have also identified 1,702,831 for habitat restoration, almost all of which have already been acquired. About 405,000 acres are needed for CERP projects, half of which have already been acquired and overlap with land for other water and habitat projects. This land is in addition to the federally owned Everglades National Park.⁴



Nesting Wading Birds in South Florida 1986-2005



Nesting Wading Birds

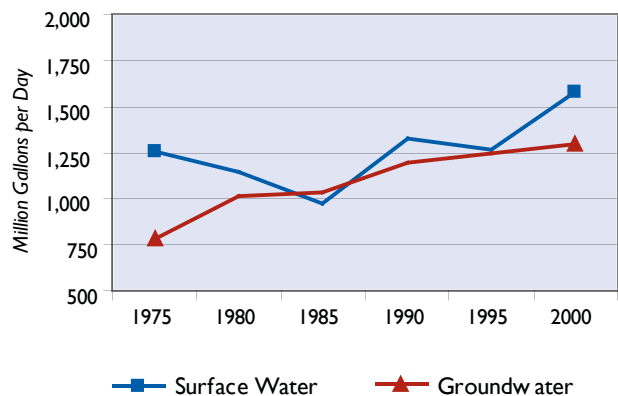
The South Florida Ecosystem Restoration Task Force identified nesting wading bird populations as an indicator of ecosystem health and established targeted increases in the populations for four species of nesting wading birds. About a century ago, the population of nesting wading birds in the greater Everglades region, which includes both coasts of South Florida, was about 2.5 million. With the drainage of the wetlands, this population has plummeted. The restoration of the natural hydrology and water levels is expected to increase populations of nesting wading birds and cause a return to their historic nesting locations. All four species met their targets in 2004; however, because of high waters caused by the 2004 hurricane season, only two species met their targets in 2005. But, historic nesting patterns have not reemerged. In 2005, only 5.5 percent of nesting birds were found in the southern mainland estuaries, their historic nesting location. Most were found in the central and northern Everglades.⁵

Water Supply

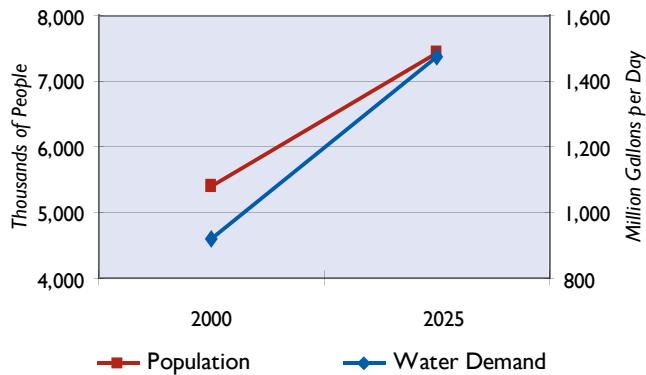
Primary goals of ecosystem restoration are to ensure that water will be available for existing and future uses, while protecting and enhancing natural systems. Fresh water is drawn from both surface waters, such as Lake Okeechobee, and from underground aquifers, which are porous stone formations that are recharged very slowly through the seepage of groundwater. Water used for agriculture, commercial irrigation, and power generation comes largely from surface waters, while water used by residents (including residential irrigation) and industries is derived primarily from groundwater.

It is critical to extract no more groundwater from aquifers than is recharged. During a prolonged drought in the early 1970s, water tables dropped to a point where salt water was absorbed into coastal wells. The largest source of groundwater withdrawals is public supply, which comes from the city or county water supply system and is delivered to homes, businesses, and schools, among others. Public water supply withdrawals currently account for 70 percent of fresh groundwater withdrawals in the region. Based on preliminary estimates of public water supply demand, such withdrawals are expected to increase 60 percent by 2025.⁶ Agricultural demand, which has a greater impact on surface waters, is expected to decrease. However, due to the limited amount of inexpensive, easily extracted water, and the impact of water withdrawals on the Everglades, it will be a challenge to meet the increasing water demands of the rapidly expanding population.

Freshwater Withdrawals in South Florida 1975-2000



Historic and Projected Population and Public Supply Water Demand in South Florida 2000-2025



The SFWMD recommends increasing the use of reclaimed water. Reclaimed and treated wastewater is largely used for landscape irrigation, agriculture, groundwater recharge, and industrial uses, offsetting groundwater and surface water withdrawals. In South Florida, water reuse is highest in the core counties, reaching 35 million gallons per day in Palm Beach. However, per capita water reuse is much higher in the northern counties, with Broward and Miami-Dade lagging behind the rest of the region.⁷ Alternatives for helping South Florida reach a sustainable balance between water supply and water consumption include the use of treated wastewater for irrigation and agriculture, desalinization and reverse osmosis of salt water, and conservation measures encouraged through public awareness campaigns.

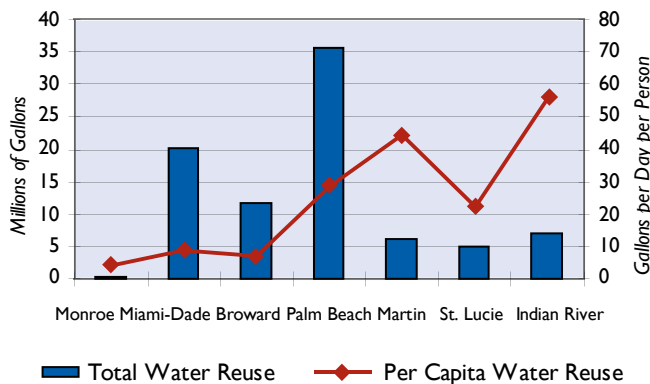
In addition, the ability of the region to meet its future water needs largely depends on the completion of CERP projects and effective growth management. Florida’s new growth management law of June 2005 appropriated \$1.1

billion for water over the next ten years, largely to develop alternative sources.⁸ The law encourages cooperation in the development of water supplies and regional water supply authorities by municipalities, counties, and special districts; requires budget allocations to be used for alternative water supply development by water management districts; and establishes economic incentives for alternative water supply development. The new law also requires that communities develop plans for water supply and infrastructure before allowing population and urban growth. They will be expected to “pay as they grow.”⁹

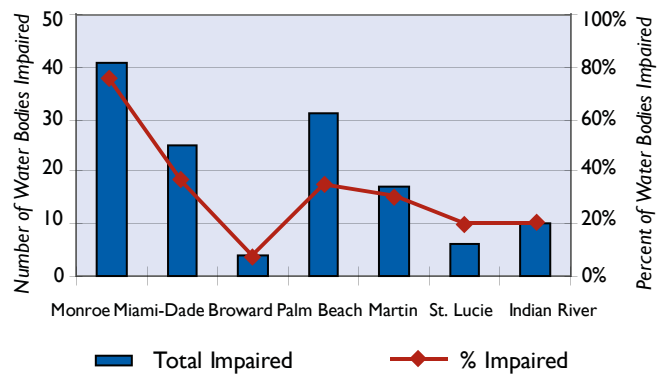
Water Quality

The groundwater that supplies most of the region’s potable water meets quality standards. However, the surface waters, which are used for agricultural and recreational irrigation, recreational activities such as swimming and fishing, and as habitats for numerous plants and animals, are easily contaminated by urban stormwater, agricultural runoff, domestic and industrial wastewater, and hydrologic modifications. Surface water contaminated to the point it fails to meet its designated use (e.g., fishing, swimming, drinking) is considered impaired. Federal and state laws require that waters be monitored for pollutants and that total maximum daily loads (TMDLs) be developed for impaired waters. The TMDL is the maximum amount of any particular nutrient (e.g., nitrates and phosphates) or pollutant (e.g., mercury) that a water body can contain and still meet its designated use. In South Florida, 134 tested water bodies (34% of total tested) were identified as contaminated, necessitating development of TMDLs for different pollutants. Of these, 11 water bodies have been identified as having one or more contaminants, making them high priority for TMDL remediation.¹⁰

Water Reuse in South Florida 2004



Water Bodies Targeted for Pollution Monitoring 2004



Beach Erosion

South Florida’s beaches and coastal waters are important to the region’s economic and ecological health. They attract tourists, provide habitat for wildlife, and enhance the quality of life for the region’s residents. The challenge is for both the beaches and the coastal waters to overcome environmental and man-made hazards that threaten their ecological health. Beach erosion is a primary concern, particularly in South Florida. Some beach erosion is due to natural forces, such as high winds and tidal surges caused by hurricanes. Some is due to coastal development and sea walls built to protect against storm surges. Most is the result of the construction and maintenance of navigational inlets. As trade and tourism grow at South Florida ports, it has become necessary to deepen inlets to accommodate commercial and recreational vessels, interrupting the natural flow of sand and causing sand loss from the beaches.¹¹

In 2004, after Florida was ravaged by four hurricanes, nearly 60 percent of the state’s 825 miles of beaches were eroded, and more than 40 percent were critically eroded—threatened with loss of land for upland development, recreational interests, wildlife habitat, or important cultural resources. South Florida has a larger proportion of critically eroded beaches, 16 percent above the state benchmark. South Florida beaches now comprise 33 percent of the state’s critically eroded beaches.¹²

Each year Florida spends \$113 million on restoration and nourishment projects at priority beach sites. Regular nourishment and restoration activities for fiscal year 2004/05 included four priority projects in South Florida: South Boca Raton, Palm Beach Island, Hutchinson Island, and Fort Pierce. The St. Lucie Inlet Management



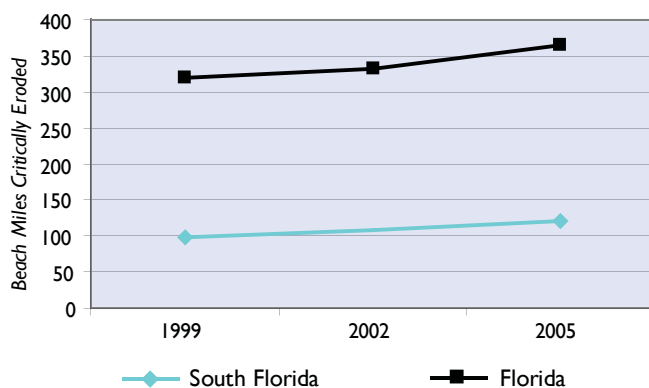
Implementation Plan is also a priority project. In addition, 17 projects will be undertaken throughout the region to restore about 90 miles of South Florida beaches that were impacted by hurricanes Frances and Jeanne in 2004.

Beach Advisories

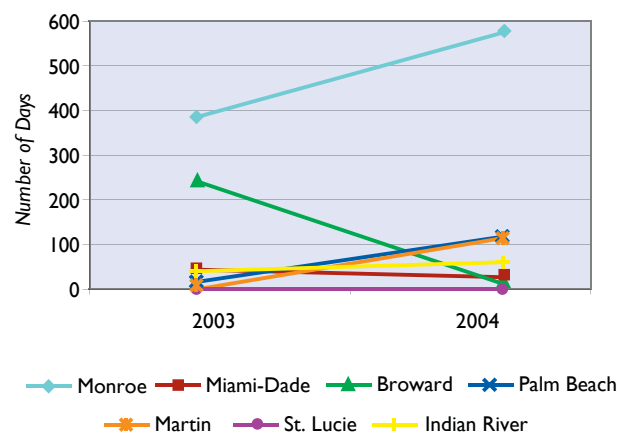
Ocean water in Florida’s coastal counties is tested for disease-causing bacteria caused by human and animal waste that comes from stormwater runoff from urban, suburban, and rural areas; from discharges of untreated wastewater from sewage treatment plants; or from septic tank failures. An advisory is issued when the amount of bacteria measured exceeds the acceptable amount.

Overall, advisories have been minimal in Miami-Dade, Palm Beach, Martin, and Indian River counties, though Palm Beach and Martin experienced anomalies in 2004. The number of days that advisories were issued in South Florida increased 25 percent from 2003 to 2004,¹³ with much of the contamination in Monroe and Palm Beach counties localized in just a few beach areas.¹⁴ Monroe

Beach Erosion in Florida and South Florida 1999-2005



Beach Advisories in South Florida 2003-2004



County had a large number of advisories due to runoff from a population heavily dependent on septic tanks and living in close proximity to the water. The substantial decrease in Broward is misleading because the Intracoastal testing site that resulted in many of the advisories in 2003 was no longer monitored in 2004.¹⁵ Because tougher standards were established in August 2002, advisories prior to 2003 are not comparable.

Not only have Broward County’s beaches had minimal contamination in 2004, but five have been certified by the Clean Beaches Council as Blue Wave Beaches, indicating that they are clean, healthy, and environmentally well-managed. The five beaches—Hollywood, Dania Beach, Fort Lauderdale, Pompano Beach, and Deerfield Beach—all met criteria for water quality, beach conditions, safety, service, habitat conservation, erosion management, and public information and education.¹⁶

Fish Landings

South Florida’s coastal waters also include bays, estuaries, and lagoons, all of which are located close to the ocean, composed of both saltwater and freshwater sources, and are threatened by pollution from urban runoff and salinity imbalances. Shellfish are very sensitive to changes in the water’s salinity, and an imbalance can lead to a decline in shellfish populations and, therefore, shellfish catches. Shellfish catches in South Florida remained fairly constant from 1990 to 2000 but declined sharply from 2000 to 2001, due largely to a 43 percent decrease in Monroe County, where almost 90 percent of South Florida’s shellfish is caught. From 2001 to 2003, catches increased slightly in Monroe County, but decreased in all other counties.¹⁷ Saltwater fish catches also indicate the health of coastal waters. Smaller catches can result from



pollution, declines in water clarity, loss of seagrass, damage to coral reefs, as well as over-fishing. Overall fish landings decreased by 42 percent from 1990 to 2000, but rose slightly by 2003.¹⁸

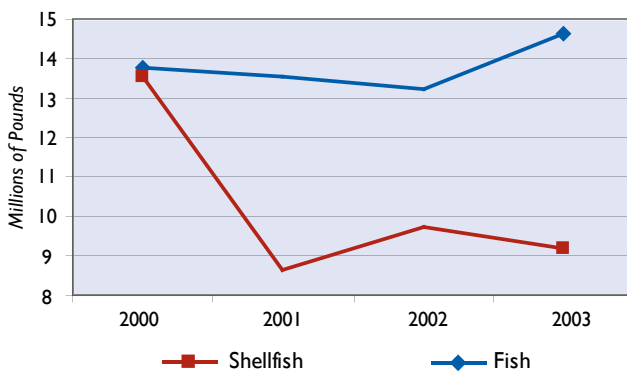
LAND USE

Urban Areas

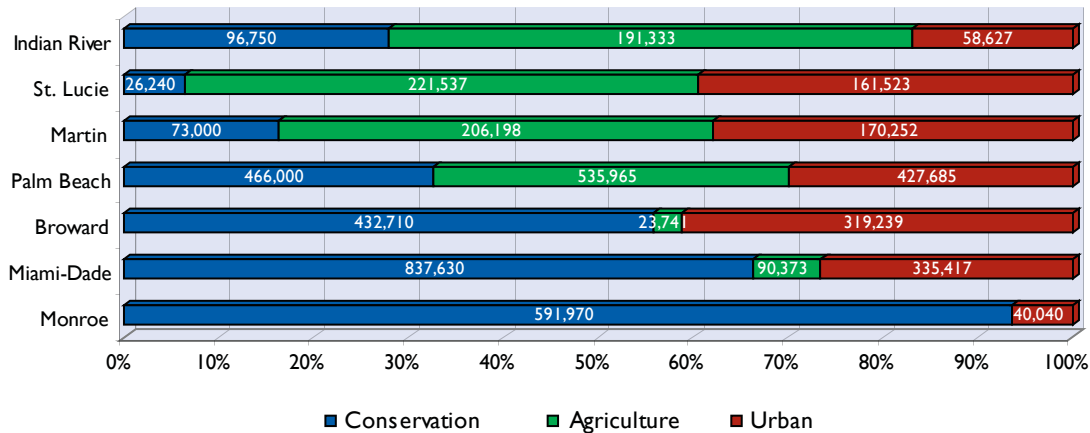
The region consists of 5.3 million acres of land. The three southern counties—Monroe, Miami-Dade, and Broward—cover 2.7 million acres, about 70 percent of which is part of the original Everglades. The rest is largely urbanized area with some agriculture. Almost 70 percent of Palm Beach County’s 1.4 million acres is either conservation or agricultural land. About half of the three northern counties is composed of agricultural land, followed by about one-third urban areas.¹⁹

The pressure of population growth has led to significant expansion of urban areas, largely in the western parts of the region, in low-density suburban communities. In the core counties, the populations of the western areas grew by at least 30 percent from 1990 to 2002, and many exceeded 65 percent. In contrast, most urbanized eastern communities grew by less than 20 percent and some even lost population.²⁰ The predominance of growth in the western part of the region represents urban sprawl, which is a geographically radiating pattern of development that moves outward from the urban core and threatens rural and environmentally sensitive lands in the region. Currently, South Florida ranks number eight among the top 20 sprawling economic areas in the country.²¹ By 2025, South Florida is expected to have the eighth highest household growth among the nation’s economic areas. It is also expected that South Floridians will pay \$194 billion (or \$36,336 per person) over 25 years (2000-2025)

Landings of Fish and Shellfish in South Florida 2000-2003



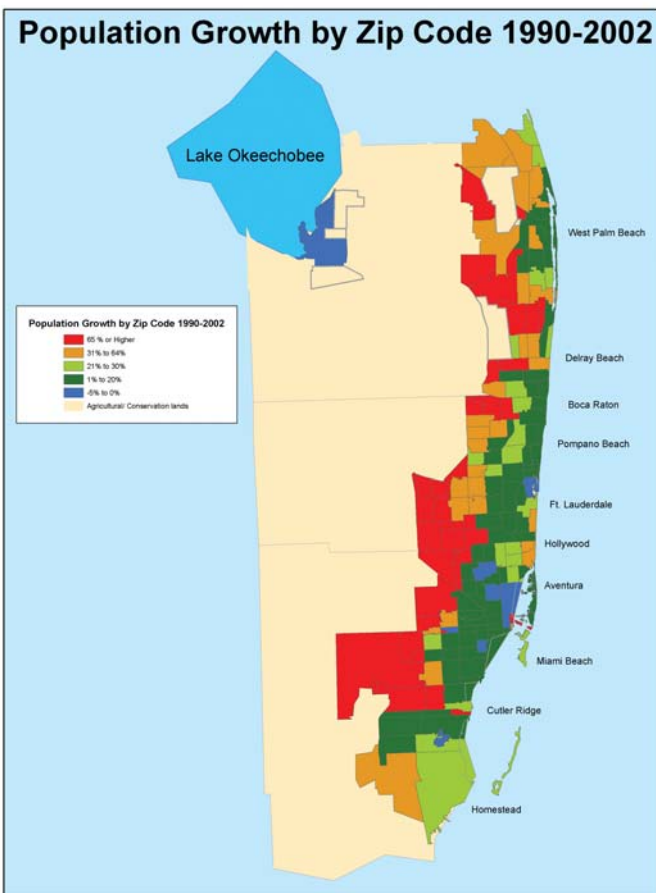
South Florida's Land Use by County (in acres)



to live in sprawling communities. If just a quarter of low-density growth is shifted to higher density growth, residents could save \$18 billion (or \$3,277 per person).²²

In addition to low-density residential development, office locations in the region are also highly dispersed.²³ Compared to 12 other major metropolitan areas throughout

the United States, South Florida has the largest percentage of office space in suburban areas.²⁴ The urban areas of downtown Miami, downtown Fort Lauderdale, Boca Raton, and Miami International Airport accounted for only 34 percent of office space in 1999. Suburban cities accounted for 66 percent. This is not new for South Florida, where office space was similarly distributed prior to 1980, with 69 percent in the suburbs.²⁵



Source: Claritas (www.claritas.com)
Map Created February 22 by CUES (www.cuesfau.com)

This pattern of residential and office development jeopardizes undeveloped land and contributes to traffic congestion. Dispersed workplace concentrations make it difficult to provide mass transit, resulting in longer commutes and reducing available time with family and friends. Additionally, this development pattern decreases employment opportunities for residents of declining inner cities. On the other hand, some argue that although urban sprawl increases commuting distance, it also increases speed and decreases congestion because drivers are more dispersed.²⁶

Population and urban area growth in the northern counties of Martin, St. Lucie, and Indian River are in their early stages, and St. Lucie has become a “hot spot” for more affordable housing. Growth management is an important issue in these counties as they face dual issues of sprawl and land conservation.²⁷

Rural and Agricultural Areas

Rural and agricultural lands are an essential part of the region’s sustainability and an important link between the natural and built environments. They provide natural areas for water retention and treatment, aid in aquifer recharge, provide wildlife habitat, help direct development to urban areas, and provide space for recreation and

enjoyment of nature. However, they are threatened by changes in the agriculture industry and pressures from a growing population. According to St. Lucie County Commissioner Doug Coward, “[T]he region’s rural lands and natural systems are in crisis. Unless we take bold steps to protect and restore large natural areas, contiguous expanses of open space, and agricultural lands, and change how and where we develop, the crisis will only accelerate as the population grows.”²⁸

Agriculture contributes almost \$1.8 billion annually to South Florida’s economy, although the market value of agricultural products has decreased. Regionally, market values fell two percent from 1992 to 2002, and farmland decreased ten percent. In Palm Beach County, which has the largest regional agriculture sector, profits decreased 15 percent over the decade and farmland decreased 16 percent. In the Treasure Coast, market values fell 26 percent, and farmland decreased seven percent. However, in Miami-Dade County, market values increased 62 percent, and farmland increased eight percent.²⁹

Global competition from countries with lower production costs and fewer environmental regulations is making it difficult for American farmers to remain competitive. This intensified in 2004 when two hurricanes devastated South Florida’s crops. About 60 percent of citrus crops were destroyed and winds spread canker disease, causing further losses. These economic conditions, along with demand for low-density, moderately priced housing, make rural lands much more valuable when developed than when farmed.³⁰

Rural landowners have been under increasing pressure from developers to sell their land. To retain rural lands, it



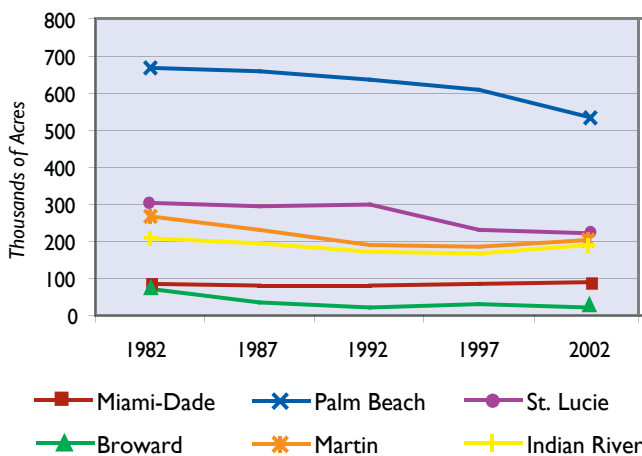
is essential that landowners generate sufficient revenues, or that lands are protected by government programs. Currently, some rural lands are protected by conservation easements, limiting use to designated purposes and prohibiting sales for development. Another retention strategy is to increase the land’s revenue-producing capacity in innovative ways, such as supplanting profitable crops like specialty crops and horticulture for traditional crops, and creating multiple uses for the land. This includes offering services and products such as stormwater and wastewater treatment, wildlife habitat, and recreation and open space. These would be produced and marketed as part of the landowner’s business.³¹

Conservation Areas

As urban development proceeds and rural lands become prime areas for future development, it is essential to conserve environmentally sensitive lands to protect and restore South Florida’s ecosystem and to provide open space and recreational areas for residents and visitors alike. Land is acquired by the public through funding partnerships between local, county, and state governments, as well as conservation groups such as the Trust for Public Land, 1000 Friends of Florida, the Florida Audubon Society, and The Nature Conservancy.

The State of Florida provides \$300 million annually through the Florida Forever program, and county and city governments raise money for land acquisition through bonds and taxes. In the past five years, 13 measures have been approved at the county and municipal levels. In 2004, seven measures passed in South Florida. Three were in Miami-Dade County, where \$1.4 billion in bonds was approved for improvement of parks and recreational facilities, preservation of endangered lands, land acquisition, new playgrounds, and historic site preservation.

**South Florida's Agricultural Lands
1982-2002**



Three were in Palm Beach County, totaling \$76 million, including a countywide bond to acquire property to protect, preserve, and expand public access to waterways and working waterfronts. The other two were passed by municipalities. One in Jupiter was for land preservation and the other in Delray Beach for acquisition of new parks and improvement of existing parks. The last measure was in Indian River County, where a \$50 million bond was approved for the purchase of environmentally sensitive lands and open space.³² In some cases, there is a significant difference between the total amount of bond measures approved by voters and the amount allocated for land acquisition because more of the money is allocated for capital improvements to recreation centers.

HOUSING

The Housing Market

South Florida's housing market remains strong and has been characterized by continuous demand and escalating home prices. The region's metropolitan areas have consistently been among the top performing housing markets in the nation. West Palm Beach-Boca Raton, Miami-Hialeah, and Fort Lauderdale-Hollywood-Pompano Beach ranked among the nation's top 15 housing markets in the first quarter of 2005, although appreciation rates are slowing from a year ago.³³

Sales and construction are booming, with residents and foreigners continuing to invest in real estate. In Miami-Dade, new residential construction permits hit a ten-year peak in 2004, due largely to construction in Homestead. In Palm Beach, the trend has been one of growth, peaking in 2003 and falling slightly in 2004. Though the northern counties did not undergo the same volume of residential construction permitting as the southern counties, the rate of growth has been more dramatic. The only exception is Broward, which is approaching build-out.

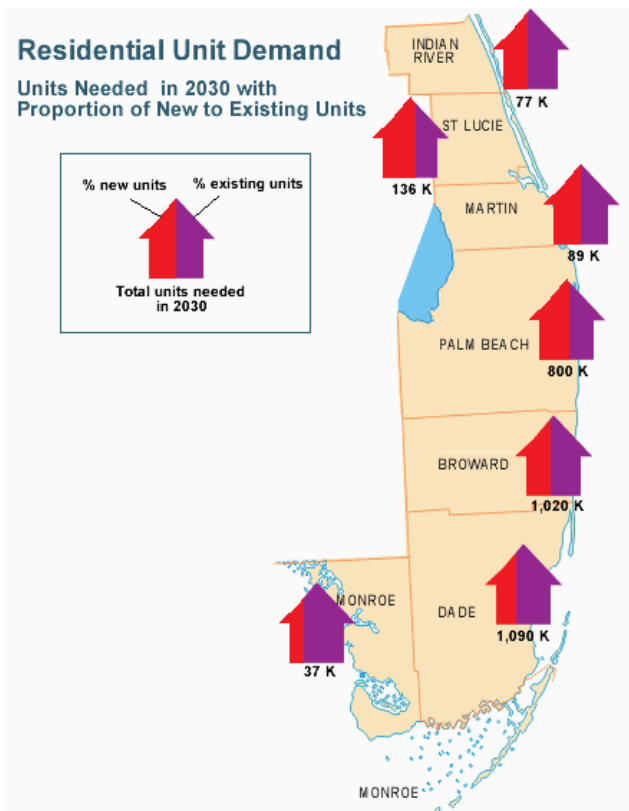
In 2004, 55 percent of Miami-Dade's new residential permits were for multi-family housing, reflected in the increasing number of condominium conversions. Multi-family housing accounted for 45 percent of new permits in Broward County and 30 percent in Palm Beach County. In the northern counties, only 15 percent of 2004 permits were for multi-family units.³⁴

It is projected that, at a minimum, an additional 1.5 million residential units will be needed during the next 25 years to house the region's population and to replace old

Foreign Real Estate Investment in South Florida's Core Counties 1983-2003



structures. Overall, this will result in a 52 percent region-wide increase in residential units. The total number of residential units, including new and existing units, will reach over three million.³⁵

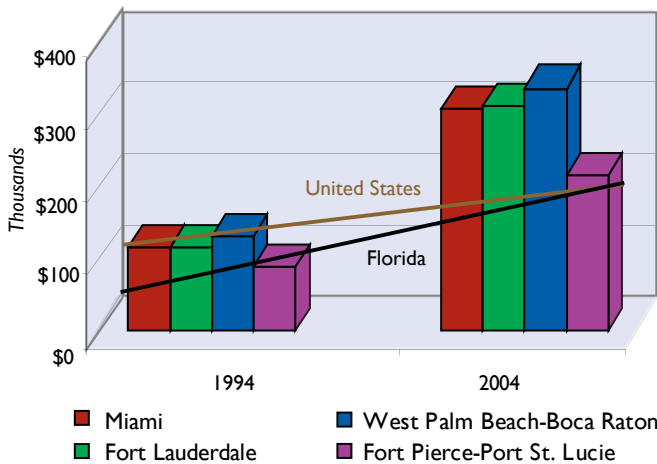


Housing Affordability

Although the real estate market is strong, the region's workers continue to be challenged by the escalating price of housing. In July 2005, median prices for the region's existing single family homes reached almost \$400,000, except in the Fort Pierce MSA where median home prices reached \$265,300. The region's July 2005 median sales prices were 26 to 37 percent higher than a year ago.³⁶ By October 2005, median prices had fallen slightly in the Fort Lauderdale MSA and Fort Pierce MSA due to Hurricane Wilma and the cooling housing market. Some experts say that the market has peaked, and appreciation rates may slow to single digits.³⁷ Condominiums and townhouses are a more affordable option, yet they are also expensive and rapidly appreciating in value. For example, in June 2005, the median price of a townhouse/condo was \$205,000 in Broward County and \$259,000 in Miami-Dade.³⁸

Rapid appreciation has made it increasingly difficult for the average worker to afford a single-family home since wages cannot keep pace with prices. Regionally, about a quarter of homeowner households in 2002 paid more than 30 percent of their income on housing. The household cost burden is highest among homeowners in Broward, followed by Miami-Dade, Palm Beach, Monroe, St. Lucie, Indian River, and Martin counties. Miami-Dade and Broward have the largest percentage of homeowner households statewide paying more than half of their income on housing.³⁹ The pool of affordable housing in the region has declined substantially over the past decade, so that median income households can now afford less than a third of homes, and only 14 percent in Miami.⁴⁰

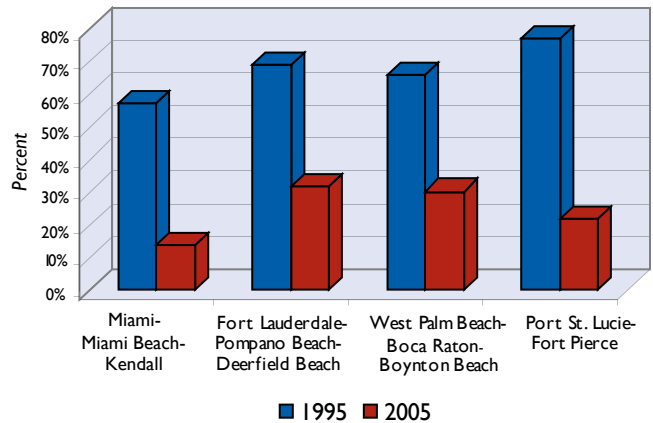
Median Price of Existing Single Family Home in South Florida MSAs 1994 and 2004



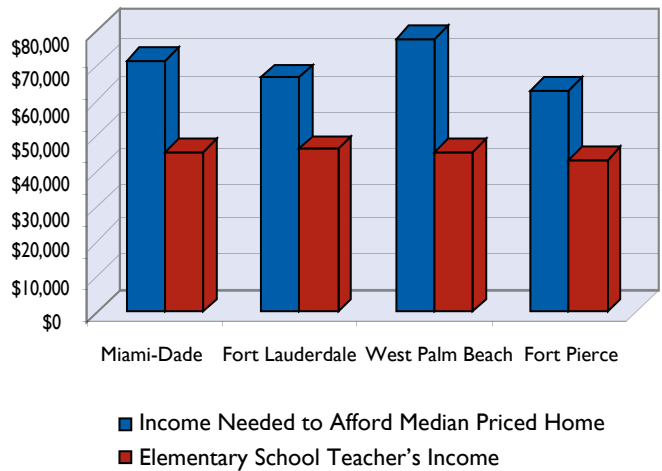
The gap between the money needed to purchase a home (single or multi family) and the salary of workers in traditional occupations (such as elementary school teachers and police officers) is becoming greater. In 2005, police officers' salaries were well below that needed to purchase a home, compared to 1999, when police officers' incomes exceeded that necessary to afford a home. The salaries of elementary school teachers in 2005 were well below that needed to buy a home.⁴¹

Not only is homeownership becoming farther out of reach, but the gap between renters' incomes and fair market rents also continues to grow. Florida ranked 49th in the country for rental housing affordability and more than 40 percent of renter households statewide are "cost burdened," meaning that more than 30 percent of income goes toward housing.⁴²

Homes Affordable for Median Income Households 1995-2005



Housing Affordability for Elementary School Teachers in South Florida's MSAs 2005



In 1992, the Florida Legislature passed the William E. Sadowski Affordable Housing Act to provide money to local governments for affordable housing initiatives. Under the act, the State Housing Initiative Partnership program provides funding for both ownership and rental units to county and city governments based on population size. Local governments leverage these appropriations with local public and private sector funds. Since its inception, the amount of money from the state to the region increased more than 800 percent, from four million dollars in fiscal year 1994/95 to \$37 million in 2003/04.⁴³ Florida has been a national leader in establishing a dedicated funding source for affordable housing, the documentary stamp tax. However, 2002/03 was the last year of full funding, at \$250 million statewide. Since then, funding has been capped and has decreased to under \$200 million, while additional money from the housing fund was appropriated for other uses. In 2006/07 \$243 million was appropriated for housing. If funding is not capped this year, an additional \$400 million will be available for housing.⁴⁴

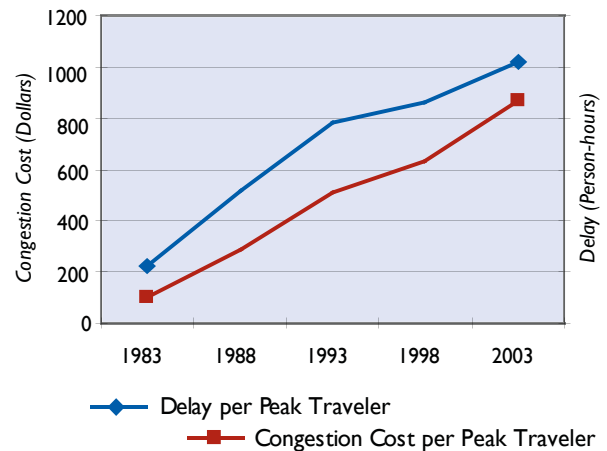
TRANSPORTATION

Highway Congestion

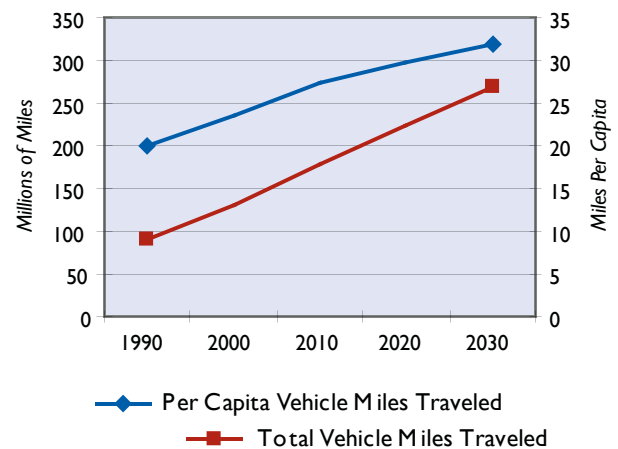
Population growth, sprawling land development, cross-county commuting, and a lack of transportation alternatives have led to increasing traffic congestion region-wide. In 2003, the annual delay per peak hour driver in the Miami-Fort Lauderdale-West Palm Beach MSA reached 51 hours, up 31 percent from 1993. The South Florida MSA had the 13th highest per-driver annual delay among large MSAs nationwide. The cost of congestion has risen as well, reaching \$869 in 2003, up 70 percent from 1993.⁴⁵ Consistent with increased traffic delays and congestion costs, drivers are traveling more miles on South Florida highways. Vehicle miles of travel (VMT) is the sum of the distances traveled by all motor vehicles in the region in a specified period of time. Increases in VMT add to air pollution, fuel consumption, and traffic congestion. Due to the large population increase from 1990 to 2000, the total number of VMT in the region grew 45 percent while per capita VMT grew 17 percent. Monroe, Broward, Palm Beach, and Indian River all experienced more than a 20 percent increase in per capita VMT, with Indian River leading the way at 29 percent. Miami-Dade, Martin, and St. Lucie counties realized increases between 10 and 14 percent.⁴⁶ In addition, excess fuel consumption has increased 329 percent from 1983 to 2003.⁴⁷

Projections for 2030 yield similar results. Total VMT is projected to increase another 107 percent from 2000 to

**Traffic Congestion in South Florida
1983-2003**



**Vehicle Miles Traveled in South Florida Region
1990-2030**

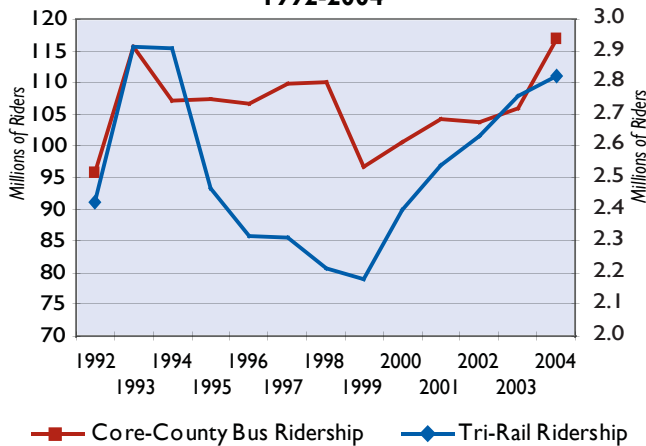


2030.⁴⁸ Population increases and additional drivers will fuel much of this increase, as per capita VMT is projected to increase by 36 percent. Palm Beach County is expected to have the largest per capita VMT increase from 2000 to 2030, trailed by Monroe, Miami-Dade, Broward, Indian River, St. Lucie, and Martin counties.⁴⁹

Public Transit

Public transit has been slow to gain popularity among South Florida residents, in part because of limited and inconvenient boarding locations and long travel times. Bus ridership has increased slowly but steadily in Broward and Palm Beach counties from 1994 to 2004. In Miami-Dade, it decreased through the 1990s and through 2002 but began to increase from 2003 to 2004, likely due to increases in the price of fuel.⁵⁰ Tri-Rail gained numerous riders when it became available to ease traffic congestion while Interstate 95 was under construction, but ridership

**Public Transit Ridership in South Florida
1992-2004**



swiftly declined after 1994. It has been on an upward trend recently, increasing 29 percent from 1999 to 2004.⁵¹

As the region’s available land for highways declines and vehicle travel becomes increasingly inefficient, urban infill, transit-oriented development, and public transportation projects are gaining attention. Transit supportive development can improve mobility and ease congestion while giving greater access to jobs and affordable housing. However, creating and maintaining a quality transit system requires significant resources for building infrastructure and fleet capacity in addition to system operation and maintenance costs.

In 2006, the tri-county area will receive almost \$25 million from the federal government as part of its transportation spending bill, in addition to monies from the Transportation Equity Act. Funded projects include expansion of Metrorail in Miami-Dade, street enhancements and alternative fuel buses in Broward County, and buses and trolley shelters in Palm Beach County.⁵²

The price of addressing regional transportation needs is often beyond the reach of individual counties, requiring regional cooperation to leverage the maximum federal funding. In 2003, business and government leaders from Miami-Dade, Broward, and Palm Beach collaborated to create the South Florida Regional Transportation Authority (SFRTA). Its seeks to develop a seamless mass transit system spanning the three counties. It is currently involved in a project to double-track Tri-Rail, reducing headways between trains from one hour to 20 minutes in 2006 and serving 10.2 million riders annually by 2015. Extension into the northern counties of the region is also being evaluated.⁵³

However, to receive the maximum amount of appropriations from the federal government, the counties must have a dedicated funding source for transit improvements, in addition to working together as a region. Miami-Dade is the only county with a dedicated source of transit funding, a one-half cent sales tax passed by voters in 2002. In 2004, the tax raised \$151 million and is anticipated to generate \$160 million in 2005, with a five percent annual increase. When supplemented with state and federal resources, funding is expected to total \$503 million in 2005. Broward and Palm Beach counties lack dedicated funding sources, leaving them ineligible for millions of dollars of federal matching funds.⁵⁴

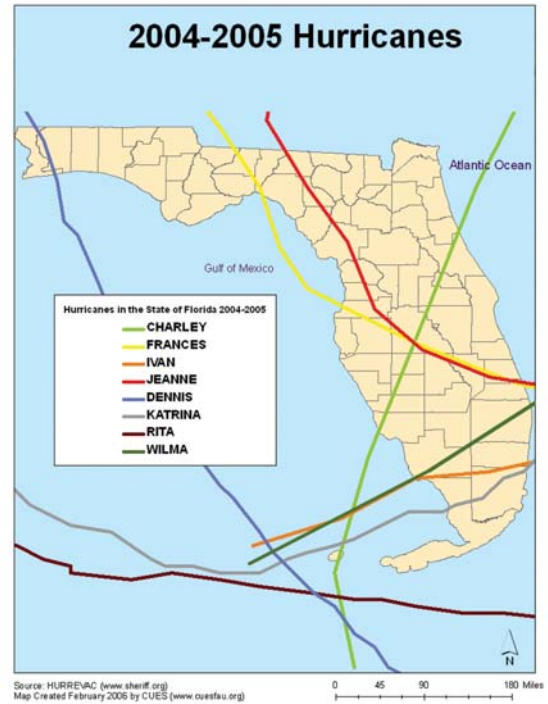
Broward County’s business leaders are lobbying for a one-cent sales tax referendum on the November 2006 ballot to fund transit improvements. The SFRTA is proposing to the Florida Legislature the creation of regional dedicated funding. According to a study by the South Florida Regional Planning Council, a one-cent sales tax is the best alternative for raising adequate funds, with the added benefit of shifting a portion of the cost to millions of South Florida tourists who use and benefit from the region’s transportation system. This would make South Florida eligible for additional transportation funding from the federal government.⁵⁵

In addition, the Southeast Florida Transportation Council, composed of the core-county MPOs, was created in January 2006. It is lobbying state lawmakers to approve a tri-county dedicated source of funding for improvements to highways, airports, and seaports. These improvements would be funded through Florida’s Transportation Regional Incentive Program, which requires 50 percent matching funds from the counties.⁵⁶



SPOTLIGHT ON THE HURRICANES

Seven of the ten most expensive hurricanes in U.S. history occurred between August 2004 and October 2005, and all seven affected Florida. Hurricanes Charley, Frances, Ivan, and Jeanne swept through Florida in 2004, resulting in more than two million insurance claims for damages exceeding \$22 billion, \$2 billion more than Hurricane Andrew 12 years earlier.⁵⁷ In 2005, Dennis, Katrina, Rita, and Wilma passed through Florida. Wilma was the most destructive of the three for Florida, costing over \$7 billion in insured damages statewide. Though a substantial amount of damage, it is not near the damage an extreme hurricane could cost the state, or even the region. South Florida is particularly susceptible to hurricane impacts. It is a low-lying region where, as of 2000, more than one million people lived in flood-prone areas and nearly 900,000 lived in Category 1 hurricane surge zones.⁵⁸ Miami-Fort Lauderdale was ranked the worst place in the nation for an extreme hurricane to strike, with the potential for \$61.3 billion in insurance losses.⁵⁹ Experts estimate that “if no other changes are made, and growth continues, a South Florida hurricane in 2020 might wreak physical damages and economic losses totaling \$500 billion.”⁶⁰ Responses to hurricanes demonstrate South Florida’s exposure risk and capacity for resilience. Since Hurricane Andrew, building codes and other regulatory policy have required tougher construction standards to help overcome some of the region’s vulnerability.



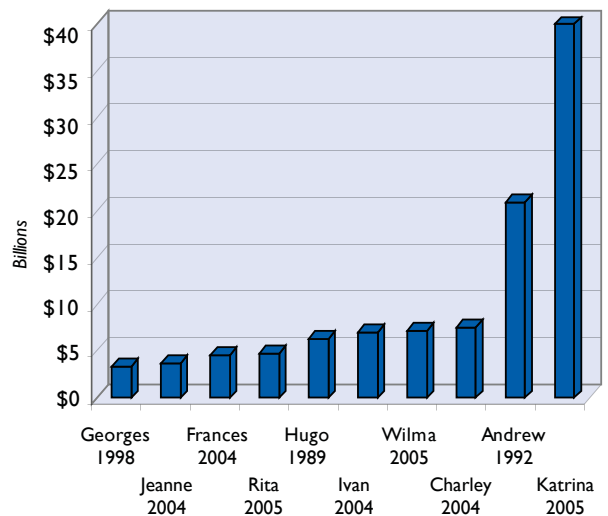
The South Florida Coastline

Hurricanes Frances and Jeanne made landfall in South Florida, within one mile of each other, significantly impacting beaches, foliage, and structures in Palm Beach, Martin, St. Lucie, and Indian River counties, with Broward and Miami-Dade affected to a lesser extent. Hurricane-related beach restoration cost \$54 million in the region. The greatest expenses were in Palm Beach and Indian River counties.⁶¹ Beach damage assessments are not yet available for Hurricane Wilma, which largely affected Broward and Palm Beach counties. Furthermore, this may not be the last of the hurricane damage. If historical patterns persist, more intense storms will affect the area over the next 20 to 30 years.⁶²

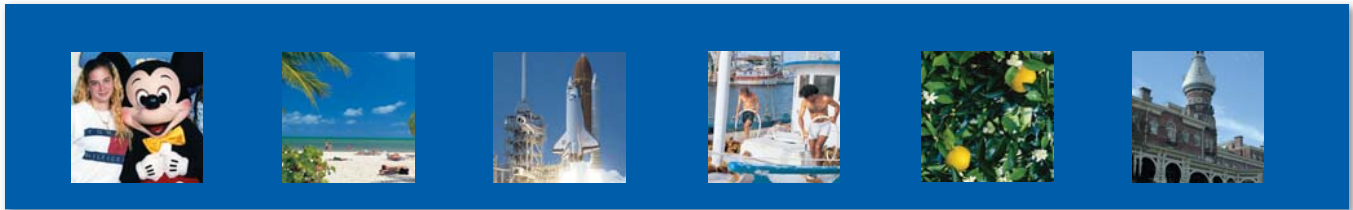
Residential Damage

Nearly one million households statewide, including home-owners and renters, applied for FEMA Housing Assistance as a result of hurricane damage in 2004. About 115,000 home-owner households⁶³ received FEMA assistance for structural damage, a quarter of them in South Florida.⁶⁴ Hardest hit were St. Lucie and Indian River counties, where nearly ten percent of homes suffered damage after hurricanes Frances and Jeanne.⁶⁵ The string of islands along the east coast is especially vulnerable. The Treasure Coast barrier islands alone sustained substantial damage to 459 structures.⁶⁶ In 2005, Hurricane Wilma displaced thousands of low- and moderate-income residents when 13,000 units in Broward and Miami-Dade counties were declared uninhabitable.⁶⁷ Governor Bush has recommended that \$302 million be appropriated for hurricane housing recovery programs.⁶⁸

Ten Most Costly Hurricanes in U.S. History



FLORIDA REGIONAL HIGHLIGHTS

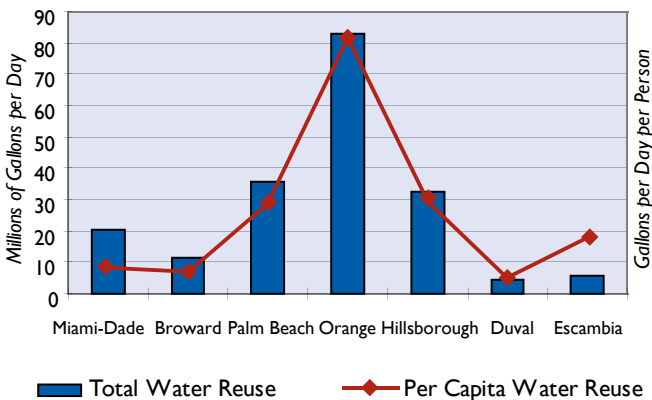


Florida’s metropolitan areas share the impact of development resulting from a spiraling population. Therefore, it is not surprising that they share many policy concerns, including concerns over water availability, lack of affordable workforce housing, and increasing traffic congestion. Florida’s urban areas have also faced the devastation of hurricanes in the recent past, as evidenced by coastal erosion of beaches around the state.

WATER REUSE

South Florida’s core counties compare unfavorably to most of the major metropolitan counties of other regions in water reuse. Unfortunately, the two most populous counties in the state, Miami-Dade and Broward, do not use alternative water supplies, nor do they reuse a sufficient amount of wastewater. Palm Beach County and the northern counties use more reclaimed water, much of which is used for landscape irrigation. Per capita water reuse in Miami-Dade and Broward counties is below 10 gallons per person per day, compared to about 20 or more across the state’s metropolitan counties. Per capita reuse reaches over 80 gallons per day per person in Central Florida’s Orange County.

**Water Reuse in Florida Regions
2004**



BEACH EROSION

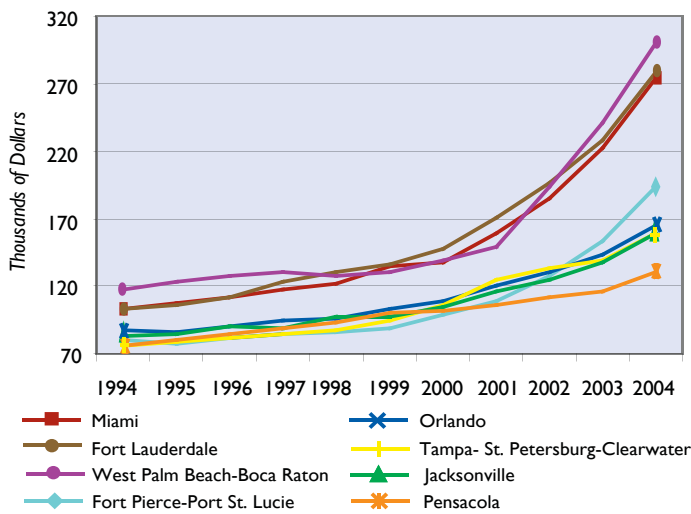
Beaches are a vital part of the tourist economy throughout the state. Beach tourism has an annual economic impact of \$40 billion and 536,000 jobs. In 2004, almost 40 percent of domestic visitors participated in beach activities. Yet nearly 60 percent of the state’s 825 miles of beaches were eroded in 2004, and, in part due to hurricanes, 45 percent were critically eroded—threatened with loss of land for development, recreation, wildlife habitat, and cultural resources.



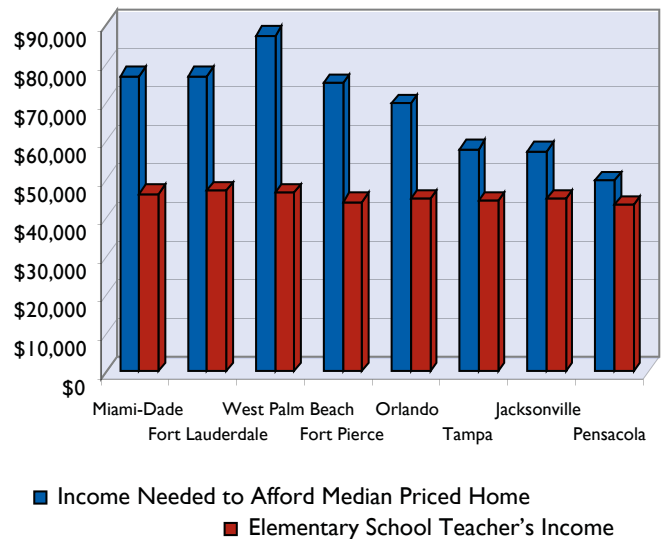
HOUSING AFFORDABILITY

While the prices of existing single-family homes have increased all over Florida over the past decade, they have skyrocketed in South Florida's MSAs. In the decade from 1994-2004, South Florida's median price increased between 155 and 170 percent, compared to 112 percent in Tampa Bay MSA, 90 percent in Jacksonville MSA, 88 percent in Orlando MSA, and 71 percent in Pensacola MSA. Equally dramatic, the median home price for South Florida exceeds that of Florida's other MSAs. Most important, South Florida suffers from a larger housing affordability gap—the disparity between the income needed to afford a home and that earned by workers in traditional occupations such as school teachers. There were, however, affordability gaps for elementary school teachers across the state's major MSAs in 2005. Not surprisingly, there are far fewer homes affordable for median income households in South Florida compared to housing markets in Orlando, Pensacola, Jacksonville or Tampa. Fewer than a third of homes in South Florida are affordable for median income households compared to other regions.⁶⁹

Median Price of Existing Single Family Homes in Florida's MSAs 1994-2004



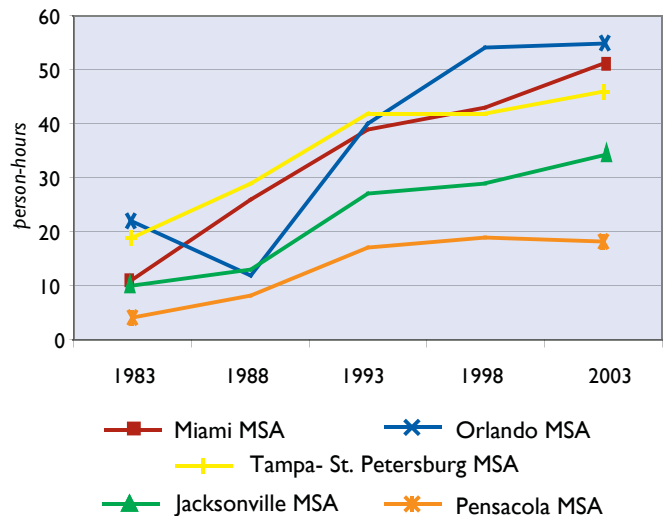
Housing Affordability for Elementary School Teachers in Florida's MSAs 2005



TRAFFIC CONGESTION

Traffic congestion has worsened in all of Florida's MSAs. In 2003, Orlando reached 55 hours of annual traffic delay per peak traveler. Miami and Tampa were not far behind, with 51 and 46 hours of annual delay, respectively. Delays in Jacksonville, on par with Miami 20 years prior, have not increased as steeply, nor have they in Pensacola. The cost of congestion in the forms of time and money has increased around the state as well. In 2003, it was highest in the Orlando MSA at \$935 per peak traveler. The Miami MSA and Tampa MSA followed close behind with congestion costs of \$869 and \$772, respectively, per peak traveler. The Jacksonville MSA came in at \$573 and the Pensacola MSA at \$300.

Annual Traffic Delay per Peak Traveler in Florida's Regions 1983-2003



COMMENTARY FROM THE EXPERTS



Ken Ammon, Deputy Executive Director, South Florida Water Management District

Past 20 years. The construction of the central and south Florida system was set up and did exactly what it was supposed to do—that was to provide for safe flood control, future development (agricultural and urban), and to supply needs of that growth. It also had what we always termed unintended consequences, a light term when you consider the immense unintended consequences caused by that system. No one knew the significant impacts of not only the water supply but primarily the flood control works, which reduced water levels up to six feet along the coast, resulting in immense amounts of seepage coming out of the Everglades. The ground and surface water that used to be on the east coast development side was lost. The environmental impacts were not clearly recognized until the early to mid '90s. We needed to reverse the trend, but first you have to identify the problem, then put in place potential projects (structural or non-structural) to try to correct or minimize the environmental impact.

Next 20 years. Since WRDA 2000, the district has been working on the planning aspects to receive federal approval to construct projects to reverse the impacts and provide for future growth out to 2050. The water use that was projected to be used in 2050 in some areas of the lower east coast has already been exceeded. There is a limit to historic, inexpensive sources of water for future growth. We need to shift growth off the surficial system because that is in direct competition with the natural systems in the Everglades. Two primary directions that South Florida utilities need to consider are reverse osmosis and the Floridan Aquifer. CERP will provide some water for future growth, but it is dependent on projects getting planned, designed, certified, and constructed so that the water is available before we can ever permit it.

If counties aren't going to limit future growth, which most have been hesitant to do, then growth outpaces the planned projections, and the water use is earlier. I do not see the growth tapering off. There are very few local counties who are not embracing a full-scale reuse program and a significant alternative source program, but the two largest counties need to step up, and we will help them. Martin County has a very aggressive alternative water supply program; they understand their future

growth is being supplied by reuse or deep water aquifer. Broward and Miami-Dade counties have lagged historically in the entire district from a wastewater reuse perspective, and they have also resisted, for whatever reason, the more expensive alternative sources.

What needs to be done. Enough is enough—we have the funding, we have the alternatives. A train wreck is coming—when there will be no more water permitting from the Everglades. It is just a matter of recognizing that this is the direction for sustainability. Landscape architect institutes and big developers have had significant discussion on future water supply, sustainability of resources, and water preservation issues. In the future, this will mean that we do not have a lot of flexibility to pull water out of the natural systems to sustain growth. That is where other projects and alternative sources will have to provide it. There is a need for significant regional solutions for water supply in the area (Miami-Dade and Broward), and a desalinization plan is a high probability for Miami-Dade and Fort Lauderdale's needs, plus an enhanced water conservation plan as well. There is political will at the state level, but not yet at the local level.



**Peter Spyke, Owner
Arapaho Citrus Management, Inc.**

Past 20 years. Urbanization and land speculation have been the biggest changes to the agriculture industry in South Florida. The value of land as agriculture has been diminishing because commodity prices have been steadily falling, while the value of land for development has been increasing. It's affected all of the counties, all the way up to Indian River. Global competition is one important factor in falling commodity prices. Another factor is consolidation of buyers. The third factor is consolidation of growers. Hurricanes generally have short-term impacts, but what is happening now is that hurricane or canker damage is layered on top of falling commodity values. If you're a grower, you can replant and take 15 or 20 years to get your capital back, or you can sell the land for ten times more than what it's worth as a farm. A lot of people are choosing to sell instead of replant.

Next 20 years. I think there's a role for agriculture in our state, and I think that other people see it as well. If Broward and Dade have done anything, they have pointed

out to us clearly what's going to happen if we don't make different choices—there is simply no open space. We're all trying to figure out how to keep that from happening in the Treasure Coast. Agricultural lands have a significant role to play in planning land settlements to accomplish different patterns. Instead of just paving over everything, you would cluster growth into compact urban areas and preserve in perpetuity significant percentages of countryside around those urban areas. There's no question that there are going to be competing uses for land, which will affect the long-term viability of agriculture. For example, Scripps coming to South Florida is going to result in a lot of economic activity; it's going to generate a pretty robust real estate market. If there's less and less agriculture in the areas, it's going to be harder to keep farming, so our land value for agriculture is going to go down. The more demand there is for land, for housing, for Scripps, the higher that value is going to be.

What needs to be done. The most important thing that needs to happen is to figure out how to conduct a stable and successful transfer of development rights (TDR) program. Right now I need to raise capital because I got wiped out by canker during the hurricane. My land is my number one residual source of capital value, but the only way that I can raise money from it is to sell it. With a TDR, I can sell my development rights to somebody who wants to develop in an area deemed favorable for development. My land will be stripped of those rights, and I keep the land for farming. The other part of the equation is that the land has to make money. A combination of those two things, the profits from agriculture and the TDR, has to be equal to or greater than the land value from the alternative use in the long term. The counties are responsible for bringing about these changes. The state could also encourage them by providing technical assistance and perhaps funding and other things that would allow a county to adopt TDR programs. It's going to help that agriculture is going to evolve into a form that fits in an urban environment as opposed to being a commodity type, production machine. I'm optimistic about it. I think that this is going to be very exciting, and to the people who figure out how to do it, it's going to be profitable.



**Michael Busha, Executive Director
Treasure Coast Regional
Planning Council**

Past 20 years. The pattern of strips malls, sprawling subdivisions, and parochialism has shaped the region. I believe these forces have not only irreversibly damaged the

natural environment, the political landscape, and social fabric of the region, but also our ability to act regionally and compete at the national and international level.

Next 20 years. The next few years should yield a few small victories. We will continue to see more communities acting regionally and adopting new urbanism, but 10-15 years out, I think that we're going to see a lot more progress. The old model, the car-dependent model, is going to become less normal because of increasing energy, construction, and transportation costs. In the 15-20 years after, I believe the old model is replaced in response to these global issues. As transportation-related mobility declines and our capacity to absorb energy costs diminishes, we localize economies and regionalism even more. This is why I don't think the power of local governments is going to diminish in any significant way. At the regional level, we'll have strategic interventions to do specific things that strengthen local economies and sustainability. We do get better at working together. But we never move away from the predominant model of control by local towns and cities. I believe each locality will need to become more sustainable locally, but still engage in beneficial regional activities that help mitigate the negative effect those issues will have on our economy.

What needs to be done. It will be essential to have effective state and local leadership in overhauling how we practice growth management. No more legislative band-aids. Real change needs to happen. There's no glory in doing the right thing. Where the glory is—it's in quick fixes and getting a little more local money or regulatory "wiggle-room" that temporarily improves things for a few. Education, increasing wages, and place-making are the keys. We need a different kind of vision, along with legislation, that institutionalizes the 27 principles of new urbanism in our growth management system. There are a lot of counterfeit and weak hybrid systems being proposed—a little "visioning," a lot of sprawl, sprinkled with a little new town, and a dash of lifestyle center. This is not the recipe for turning things around. I think applying a strong, authentic system based on the principles of new urbanism is the only approach to addressing the root cause of all the major planning, transportation, environmental, fiscal, and political issues, which go unresolved. No one has been able to show me any system that works better. I'm cautiously optimistic for the long term. In the short term, however, I believe we will look back on the last ten years as a decade of disappointment when we had the collective power to reverse the damaging trend of sprawl and parochialism but didn't seize the opportunity for change.

Prosperity

Florida, California, and Texas will account for nearly one-third of the nation's job growth of 50 million jobs over the next 20 years.¹ The good news is that South Florida is leading the nation in creating jobs and reaching full employment and is projected to continue as the state's largest single job market. The bad news is that growth is fueled by low-wage jobs. Projections indicate that the greatest employment growth by 2012 will continue to be low-wage jobs. Some higher paying jobs, e.g., teachers and registered nurses, will also be growth areas. Job growth is dominated by four employment sectors—trade, transportation, and utilities; education and health services; professional and business services; and leisure and hospitality. Unfortunately, three of these sectors are low paying, making wages problematic for many South Florida workers.

Trade and tourism continue to be primary economic drivers in the region. South Florida is a major tourist destination. It is the “cruise capital of the world” and a hot spot for megayachts. It is also a major center for international trade with the Latin Hemisphere. Miami International Airport ranks first among the nation's airports in international freight and third in international passengers. Passenger traffic at Fort Lauderdale-Hollywood International Airport has been significantly boosted by the addition of five more low-cost carriers since 1996, which now handle almost 50 percent of its passengers.² While trade and tourism are welcome and vital components of the economy, the region must diversify and increase high-wage jobs in order to remain attractive and competitive, while maintaining a good quality of life.

Today, the core counties remain the job center of the region. However, following the pattern of population growth, the trend for locations of new jobs shows a redistribution farther north. For example, in 1994, Miami-Dade held 43 percent of the region's jobs, while a decade later it had only 38 percent.



JOB GROWTH



- Over the past decade, the region's economy has been producing jobs at a faster rate than the nation but at a slower pace than the state. From 2003-2005, it has outpaced the state as well.
- The region's job growth has outpaced its labor force growth over the past decade, resulting in a consistent decrease in the official unemployment rate. In 2004, the unemployment rate in Broward County was on par with the state, while it was higher in Miami-Dade and Palm Beach counties. Unemployment rates were highest in St. Lucie and Indian River counties.

WAGE GROWTH



- Along with the challenge of growing new jobs to keep pace with population increases, wages must increase to meet escalating living expenses. For most households, the single greatest expense is housing. In the core counties of the region, growth of the housing wage, that is, the wage needed to afford rent for a two-bedroom apartment, was about double the growth in average wages from 2000 to 2003. So even as wage earnings rise, their relative value is declining. In the Treasure Coast, average wage growth outpaced housing wage growth, although housing is still out of range for many residents.
- Although the region continues its robust growth in volume of jobs, many of them are not quality jobs. Florida ranked 15th in job opportunities in the Work Environment Index, but only 49th in job quality, based on wages and the proportion of workers receiving health and retirement benefits.³

COMPETITIVENESS



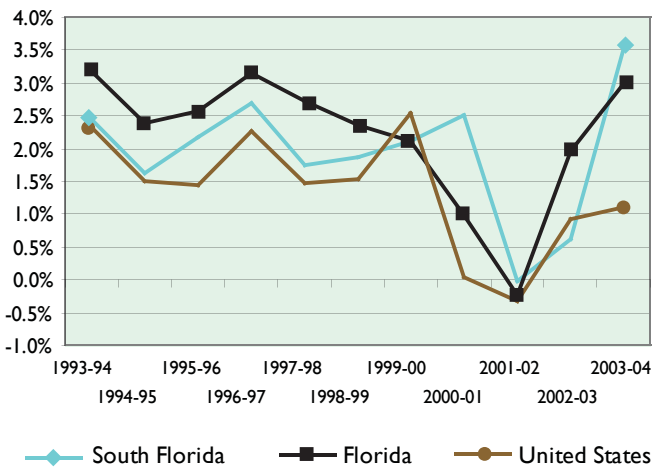
- The region's greatest promise for future economic competitiveness lies in industry clusters of life sciences (health and biological research), aviation and aerospace, and financial and professional services. Of these competitive clusters, South Florida is strong in the life sciences, very strong in aviation, but weak in the financial services sector.
- Several planned developments in biotechnology—such as the Scripps Research Institute in Jupiter, the Burnham Institute proposed for St. Lucie County, the new Academic Village planned at Nova Southeastern University, and the new biotechnology village planned by the University of Miami/Jackson Memorial Hospital—may improve future competitiveness in the industry.
- Free trade agreements (e.g., the Free Trade Agreement of the Americas and the Dominican Republic-Central American Free Trade Agreement) could enhance South Florida's position as a major financial and business hub.

WORKFORCE

Employment and Job Growth

Employment growth is a basic measure of the economy's health. The state increased its jobs by 23 percent, reaching 8 million from 1994 to 2004, compared to a national increase of 13 percent. Over this same period, South Florida's job growth rate of 21 percent lagged the state but exceeded the national rate. However, from 2000 to 2004, the rate of job growth in the region exceeded both state and national rates. South Florida's employment is expected to increase 15 percent by 2012, reaching 3.2 million. Florida's employment will increase 16 percent, reaching 9.5 million jobs.⁴

National, State, and Regional Annual Job Growth Rates 1994-2004



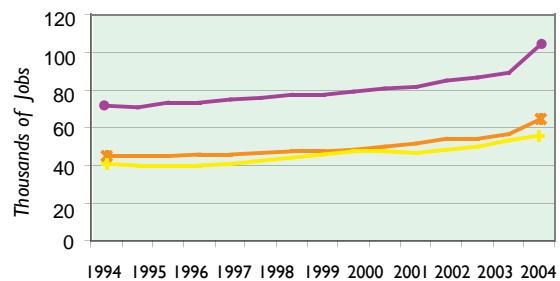
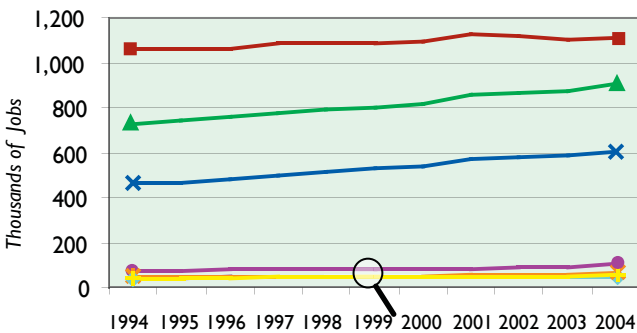
The region's core counties provide about one-third of the state's jobs and over 90 percent of the region's jobs. Miami-Dade accounts for the largest number of jobs, trailed by Broward and Palm Beach, but its share decreased from 1994 to 2004. Rates of job growth have tracked population growth, increasing more rapidly north of Miami-Dade County. Between 1994 and 2004, Broward and Palm Beach counties each increased their share of the region's jobs by two percent, while St. Lucie gained one percent. Five percent was lost by Miami-Dade County.⁵

Labor Force

The labor force is the total of employed workers and unemployed workers who file for unemployment benefits. It does not include people who have stopped looking for work or have stopped collecting unemployment benefits. From 1994 to 2004, Florida's labor force grew 21 percent reaching 8.4 million, compared to the national increase of 13 percent. The regional labor force grew 17 percent from 1994 to 2004, reaching 2.9 million.

Mirroring employment, the core counties account for about one-third of the state's labor force and over 90 percent of the region's labor force. Miami-Dade County has the largest labor force in the region, as well as in the state, followed by Broward and Palm Beach. However, it lost five percent of the regional labor force over the past decade due to higher growth rates in the northern counties. From 1994 to 2004, Broward County gained one percent of the labor force, Palm Beach gained two and St. Lucie gained one percent. Monroe, Martin, and Indian River have remained constant, each with two percent.⁶

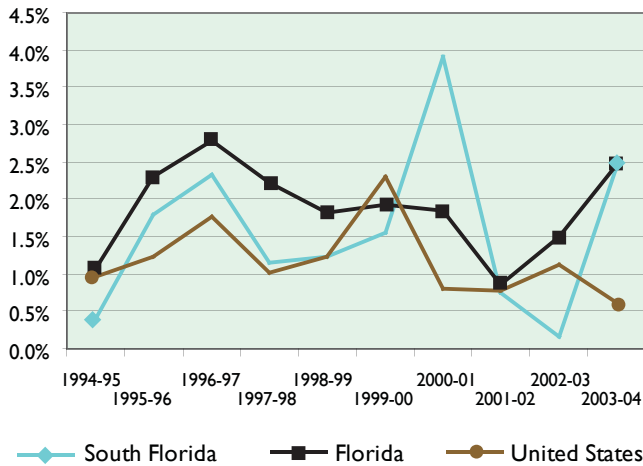
South Florida Job Growth by County 1994-2004



Focus on Treasure Coast

—◆— Monroe —■— Miami-Dade —▲— Broward —×— Palm Beach —*— Martin —●— St. Lucie —+— Indian River

National, State, and Regional Annual Labor Force Growth Rates 1994-2004



Unemployment

South Florida's unemployment rate has been higher than the state and the nation every year since 1994, except in 2004, when it fell below the national rate. Over this ten year time period, the rate of employment growth (21%) has outpaced the rate of labor force growth (17%). Therefore, the official unemployment rate has decreased.⁷

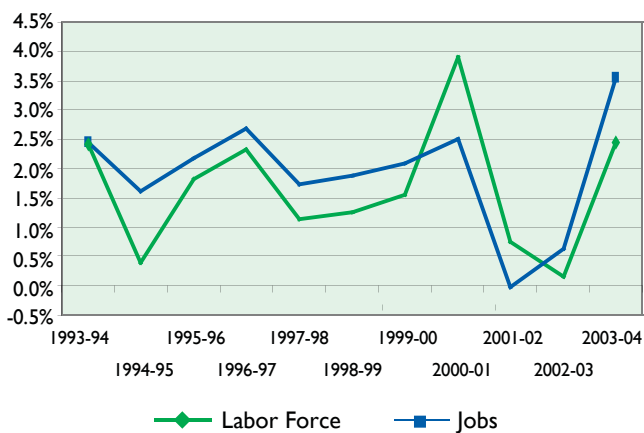
Within South Florida, unemployment rates vary by county, though most are trending downward and have become increasingly comparable over the past decade. In 2004, Monroe County continued to have the lowest unemployment rate, while St. Lucie and Indian River counties had the highest rates. Among the region's core counties, Miami-Dade had the highest unemployment rate, Palm Beach came in below the national rate at 5.1 percent, and Broward matched the state rate at 4.8 percent.⁸ In 2004,



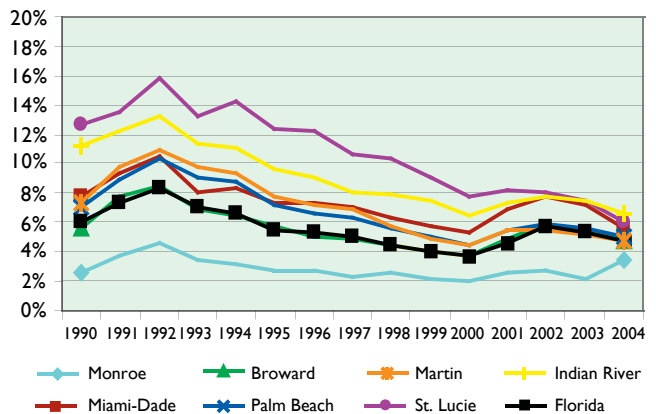
the Milken Institute ranked West Palm Beach and Fort Lauderdale among the top ten performing cities based on their ability to create and sustain job growth.⁹

South Florida's declining unemployment rates give the impression that the region's economy and job growth are in good health. However, according to Dr. Bruce Nissen of Florida International University's Center for Labor Research and Studies, the true picture emerges when comparing job growth to population growth. Nissen believes that "job growth lagging behind population growth is a highly undesirable trend."¹⁰ But this is indeed what has occurred in Florida as the state's working age population grew 8.6 percent, while employment only grew 4.9 percent, leaving a 267,000 job deficit from the recession of 2001 to December of 2004.¹¹ The gap between jobs and working age population is not reflected in unemployment rates because they do not account for the chronically unemployed who have dropped out of the labor force and no longer file for unemployment. Nor do they account for

Annual Labor Force and Job Growth Rates in South Florida 1994-2004



South Florida Unemployment Rates by County 1990-2004





people who work in the informal economy, including undocumented workers and others who do not report their employment.¹²

Workforce Education

Reducing the gap between the population and job growth is not enough. The region's economic health requires more high-wage jobs. The fastest growing part of the U.S. economy is the service sector. This sector includes low-wage jobs such as those found in the hospitality industry, which have been disproportionately represented in the region's job growth. But it also includes high-wage jobs requiring post-secondary, vocational, or higher education.

In 2004, Miami-Dade County was on par with the state with about a quarter of its population age 25 and older holding a bachelor's degree. Broward and Palm Beach counties slightly surpassed the state and the nation. However, all three core counties surpassed the state in

the percentage of the population that has a graduate or professional degree. Broward County was just below the national rate.¹³ The region is also similar to the state and nation with respect to persons with an associate degree, with an additional seven to eight percent of residents age 25 and older holding this degree.¹⁴

INCOME

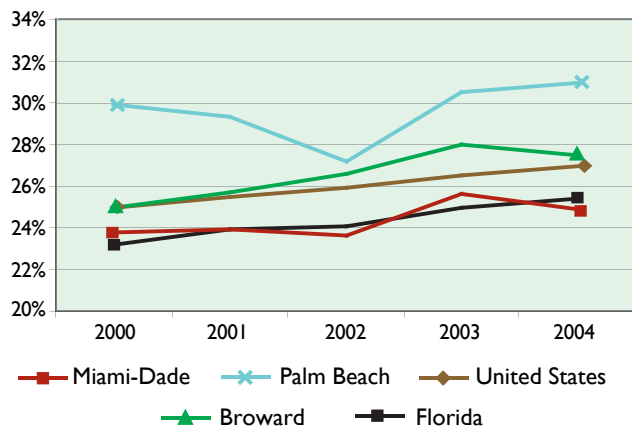
Wages

A good indicator of job quality, economic vitality, and the capacity of residents to afford housing, transportation, and other necessities of a good quality of life is the average annual wage, calculated by dividing total wages by employment. In 2003, average annual wages in the populous core counties compared favorably to the state's average annual wage but were slightly lower than that of the nation. Monroe, Martin, St. Lucie, and Indian River counties all fell well below the state and the nation.¹⁵

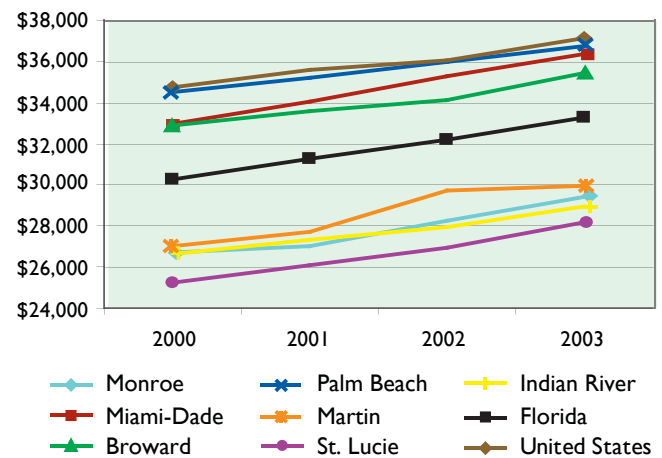
From 1993 to 2003, wage growth in South Florida counties was greatest in the southern counties. However, the region as a whole lagged behind the nation and state in wage growth. In the more recent period, from 2000 to 2003, wage growth in Monroe, Miami-Dade, Martin, and St. Lucie has exceeded that of the state and the nation. St. Lucie County's growth surpassed the rest of South Florida. Wage growth in Broward and Indian River counties surpassed the state, but remained lower than the nation.¹⁷

While average wages in the core counties are comparable to the nation and higher than the state, a wage gap

Proportion of Population Age 25 Years and Older with a Bachelor's Degree or Higher 2000-2004



Average Annual Wage per Job 2000-2003

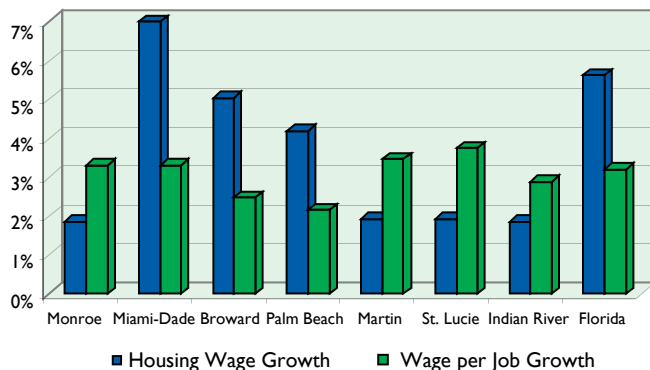


remains. Seventy-five percent of workers region-wide earn less than average wage. Among the small percentage of workers who make the average wage or more, some professions, e.g., chief executives, pharmacists, and architects, are paid higher wages than their counterparts across the nation. In lower-wage professions, such as construction, maintenance, and cleaning, workers are paid lower wages than their counterparts nationwide.¹⁸

In addition, wage growth can only provide a good quality of life if it keeps up with the cost of living. One way to assess that is by comparing wage growth to the increase in the housing wage, as calculated by the National Low Income Housing Coalition. The housing wage is the amount that a full-time worker (40 hours per week) must earn to afford a two-bedroom unit at the area's fair market rent. A unit is considered affordable if it costs no more than 30 percent of the renter's income.

In the core counties, as well as in the state, average annual wages have not kept pace with the housing wage. Wages increased between 2.2 and 3.3 percent a year from 2000 to 2003, while the housing wage increased between 4.1 and 6.6 percent. In Monroe County, as well as in the northern counties, annual wages per job have grown faster than the housing wage.¹⁹ However, in St. Lucie County, which is in the midst of a population and housing boom, the prices of single-family homes have been increasing at a fast rate since 2003, a trend that may affect both owner and renter markets.

Average Annual Housing Wage Growth vs. Average Annual Wage Growth 2000-2003



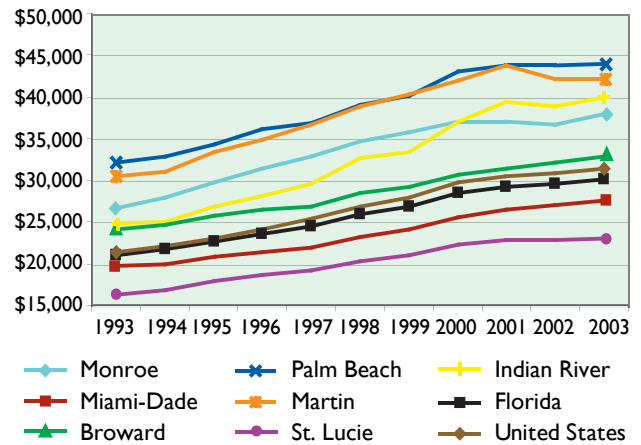
Per Capita Income

Per capita income is the total of all income, including wages, rents, investment returns, and government transfer payments, divided by the total population. South Florida's

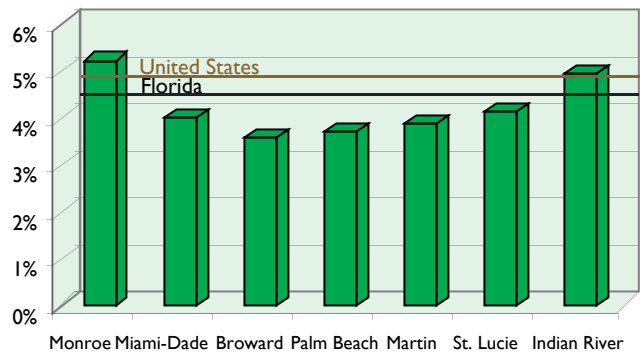
2003 per capita income of \$33,269 was 11 percent higher than the state average of \$30,098 and 6 percent higher than the national average of \$31,472. Within the region, Miami-Dade and St. Lucie counties were below the state and national per capita income levels, while Monroe, Broward, Palm Beach, Martin, and Indian River all exceeded it. Martin and Palm Beach counties led both the region and the state in per capita income, reflecting the large amount of non-wage income (investment returns) there.²⁰

Although the region includes Florida's two wealthiest counties (Martin and Palm Beach), its per capita income growth of 38 percent was less than the state growth of 43 percent and the national growth of 47 percent from 1993 to 2003.²¹ Within South Florida, the core counties lagged behind the state and the nation in per capita growth from 1993 to 2003. St. Lucie and Martin counties both lagged behind the state as well. Monroe and Indian River counties led the region and surpassed the state.²²

Regional, State, and National Per Capita Income 1993-2003



Average Annual per Capita Income Growth 1993-2003





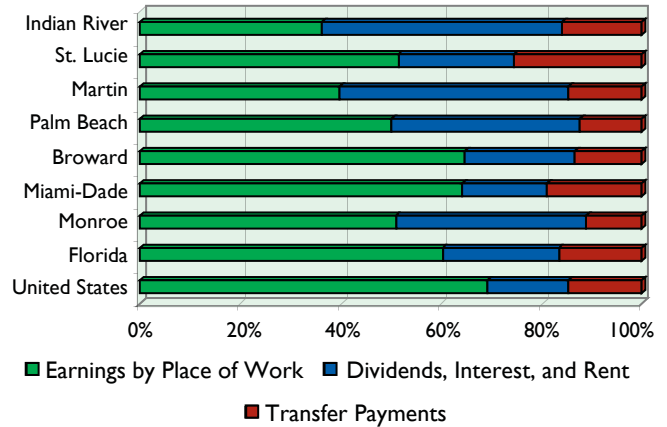
Sources of Income

Total personal income is the income of individuals from all sources, including earned income (wages), unearned income (dividends, interest, and rent), and transfer payments from the government (i.e., social security and welfare payments). It indicates the size of an economy, as well as overall prosperity, economic growth, and general purchasing power. South Florida’s total personal income grew 69 percent from \$114 billion in 1993 to \$193 billion in 2003 and accounted for the greatest share, 38 percent, of the state’s total personal income. Growth rates are highest in the northern part of the region.

As a retirement destination, the State of Florida has a higher percentage of unearned income than the nation as a whole, indicating that personal wealth is not tied to locally earned wages. In 2003, unearned income accounted for 23 percent of Florida’s personal income, compared to 16 percent nationally. Transfer payments accounted for 17 percent, compared to 15 percent nationally. Much of South Florida has a higher percentage of unearned income than the state. The total personal income of the wealthier counties (Monroe, Palm Beach, Martin, and Indian River) is composed of 37 to 48 percent unearned income, while unearned income makes up only 18 to 23 percent in Miami-Dade, Broward, and St. Lucie, where wages are a more significant source of personal income. Miami-Dade and St. Lucie have the highest proportion of transfer payments in the region, consistent with their higher poverty and unemployment rates.

The region’s income composition has experienced minor changes in the past decade. The most significant changes from 1993 to 2003 were in Broward and Palm Beach counties, where unearned income decreased 5 percentage points, earnings from wages increased 5 to 6 percentage points, and transfer payments decreased slightly.²³

**Components of Personal Income
2003**



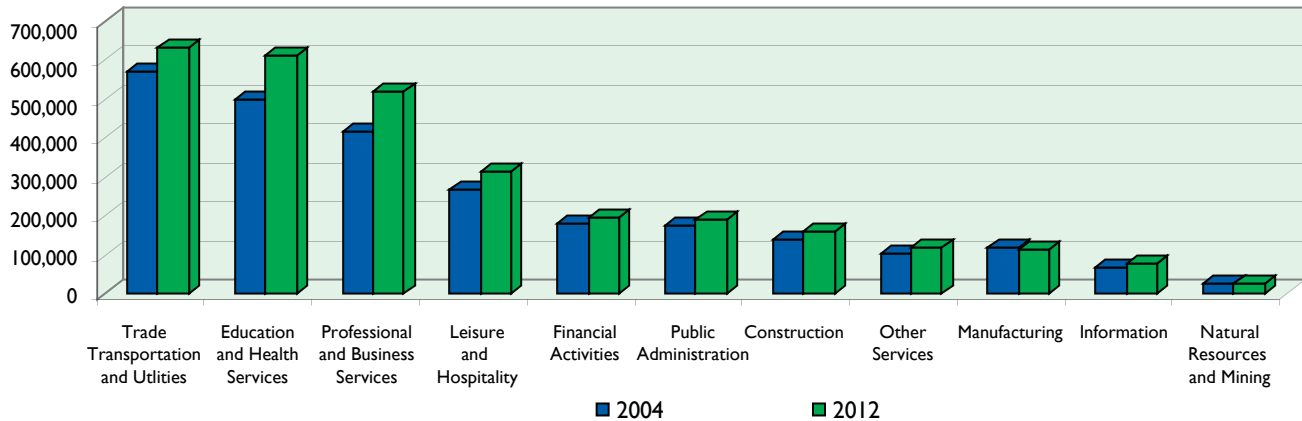
EMPLOYMENT SECTORS

Industry Sectors

A diverse economic base helps a region withstand changes in any one sector, and a favorable balance can help support the growth of quality, high-wage jobs. In 2004, South Florida’s economy was dominated by the trade, transportation, and utilities sector, which accounted for 21 percent of the region’s employment. It was followed by industries in the services sectors, such as education

Average Weekly Wages by Industry Sector and Sector’s Share of South Florida Jobs		
Industry Sector	Average Weekly Wage	% of Employment
Financial Activities	\$800-\$1150	6%
Information	\$770-\$1100	3%
Manufacturing	\$680-\$1050	4%
Government	\$780-\$1000	6%
Business and Professional Services	\$620-\$870	15%
Construction	\$625-\$780	5%
Education and Health Services	\$700-\$740	18%
Trade, Transportation, and Utilities	\$570-\$690	21%
Other Services	\$450-520	4%
Natural Resources and Mining	\$410-\$505	1%
Leisure and Hospitality	\$311-\$420	10%

**Projected Employment Growth by Sector
2004-2012**



and health services, professional and business services, and leisure and hospitality. The highest paying sectors make up a smaller portion of employment in South Florida.²⁴

The distribution of South Florida’s employment is expected to remain similar by 2012. Trade, transportation, and utilities will gain employment but drop to only 20 percent. Education and health services, and professional and business services will grow the most, increasing their share of employment.

Unfortunately, the occupations that will offer the most new work in the region by 2012 will be low-wage jobs that pay between \$6 and \$12 an hour. These include retail salespersons, waiters and waitresses, food preparation and service workers, and janitors and cleaners. The only exception among the top five occupations is registered nurses, who are in high demand and receive higher wages of \$22 to \$27 an hour. In addition, elementary school teachers will be in high demand with an average pay of about \$25 to \$27 an hour.²⁵

Occupations Projected to Gain the Most New Jobs 2004-2012	
Occupation	New Jobs Annually
Retail Salespersons	5010
Waiters and Waitresses	3583
Food Preparation & Serving Workers	2887
Registered Nurses	2711
Janitors and Cleaners	2200

Key Industry Clusters

The state identified six industry clusters in which Florida has historically shown strength and which are key to success in the new economy.²⁶ These industry clusters—life sciences, aviation and aerospace, financial and professional services, information technology, defense, and manufacturing—require skilled employees and pay high wages, with statewide annual average wages between \$43,000 and \$56,000. Four clusters have a significant presence in South Florida and are critical for future job growth.

The life sciences employed 619,350 workers in Florida in 2003, eight percent of all employment. South Florida holds over a third of the jobs in this industry cluster, comparable to its proportion of the state’s population (36%).²⁷ Major projects, such as the new Scripps Research Institute, may generate an additional 6,500 jobs over the next decade and a half, as well as a projected 40,000 more high-paying jobs from industries clustered around Scripps.²⁸ For example, the Burnham Institute, a biotechnology research institute from California, is considering locating in St. Lucie County. Miami-Dade County is also trying to further expand the biotechnology sector within the region. Planning is underway for a biotechnology village connected to the University of Miami/Jackson Memorial Medical Center.²⁹ In Broward County, the Academical Village will house biotechnology and medical research at the Florida Interdisciplinary Science Center, where Nova Southeastern University will partner with the United States Geological Survey, Florida Atlantic University, and the University of Florida.³⁰ The Research Coast Economic Development Coalition (Treasure Coast) and the iCoast (core counties) are working to attract additional bioscience industries, as well as other research and development, science, and technology-related businesses.

The aviation industry is very prominent in South Florida. Miami International Airport (MIA) is a major international gateway for both trade and passenger travel, and Fort Lauderdale/Hollywood International Airport (FLL) is a major domestic hub. Altogether, South Florida's four airports, which include Palm Beach International and Key West International, account for 41 percent of the state's aviation and aerospace industry, providing 33,813 of the state's 82,430 jobs in this sector. FLL is Broward County's largest employer.³¹

The financial and professional services industry cluster provides 782,045 jobs statewide, 273,707 of which are in South Florida. With 35 percent of the jobs in this industry cluster, South Florida has a share comparable to its share of the population. In information technology, South Florida is falling behind, holding only 25 percent of state employment.³²

Creative Industries

There is growing recognition that in the new knowledge-based economy, knowledge workers and creative industries are integral to competitiveness in the national and global economies. Creative industries are those "based on individuals with creative art skills. . . making marketable products, and whose economic value lies in their cultural (or intellectual) properties."³³ The creative industries span many sectors and include occupations in technology, science, medicine, arts, entertainment, information, and communication, among others.

In 2005, nearly 570,000 workers in Miami-Fort Lauderdale and West Palm Beach were employed in creative industries.³⁴ However, the concentration of knowledge workers and high technology industries is not favorable. Among 25 regions across the nation, the Miami-Fort Lauderdale MSA was the lowest in the number of knowledge workers per million people and concentrations of high technology industries. Miami-Fort Lauderdale ranked low in the quality of life characteristics that attract knowledge workers, including environmental quality and amenities, such as outdoor recreational activities, artistic and cultural activities, nightlife, and youth-oriented amenities. Miami-Fort Lauderdale ranked high only on diversity, along with 12 other regions. Of these regions, Miami-Fort Lauderdale was the only one that failed to rank in the upper half on the measure of knowledge workers.³⁵ The region was urged to invest in the creative industries and work cohesively in order to compete with the global creative economy. Escalating housing costs was identified as one of the major barriers to increasing knowledge workers in South Florida.³⁶ South Florida's economic de-

velopment organizations are recognizing the role of the creative industries and developing strategies to produce, attract, and retain knowledge workers.

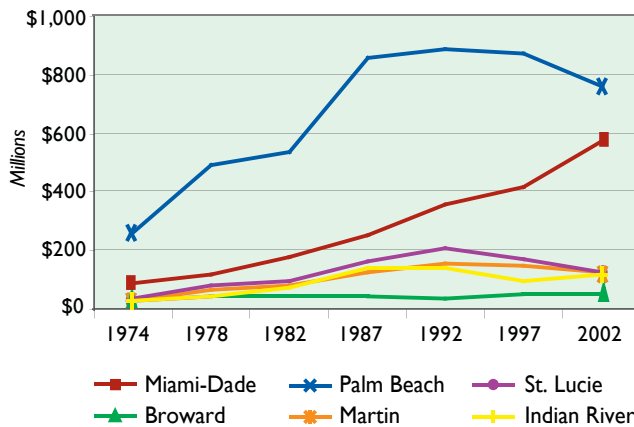
Agriculture

Agricultural production remains an important industry for Florida, with a market value of \$6.2 billion in 2002. In 2003, the state accounted for 75 percent of annual U.S. citrus production, 19 percent of the world's oranges (second only to Brazil), and 45 percent of the world's grapefruit production. Florida ranks second nationally in fresh vegetable production, providing 12 percent of the U.S. total, and provides 80 percent of the winter vegetables grown in the U.S. Florida is also the nation's second largest producer of horticulture (greenhouse/nursery), with annual sales over \$1.5 billion.³⁷

South Florida leads the state in agricultural production. In 2002, Palm Beach County led the state in total value of agricultural products sold (\$760 million), due in large part to its sugarcane harvest. Although Palm Beach County continues to be the top agricultural producer in the state, sales decreased 15 percent from 1992 to 2002. Miami-Dade County, the second-largest agricultural producer in the region, has increased its sales 62 percent from 1992 to 2002, reaching \$578 million. Within the region, the market value of agricultural production is \$1.76 billion, two percent less than in 1992.³⁸

Florida's agricultural lands have continued to decline over the past 20 years, from 12.8 million acres in 1982 to 10.8 in 1992, and down to 10.2 million acres in 2002. The region is under pressure to convert agricultural land for urbaniza-

Market Value of Agricultural Production in South Florida 1974-2002



tion and to support uses that are necessary to restore the hydrology and ecology of the Everglades (such as recharge ponds). Growing pressure persists to push Miami-Dade's urban growth boundary farther west, opening agricultural lands to urban uses. Agricultural uses have virtually disappeared from Broward County, where large-scale developments already reach the edge of the Everglades. Between 1992 and 2002, Palm Beach County lost 16 percent of its agricultural lands (paralleling the decline in the value of its total agricultural product).³⁹ Pressure for land conversion is also growing in Martin, St. Lucie, and Indian River counties, where successive seasons of citrus canker and hurricane damage have severely impacted the value of orchards. In short, the future of agriculture is uncertain in the most agriculturally productive region of the state.

Marine Industry

One of the region's largest industries, the marine industry has an economic impact (\$14 billion) that far surpasses the impact of the citrus and cruiseship industries in the entire state. With \$2.7 billion in sales in 2005, the core-county area accounted for 46 percent of marine sales in the state. The industry contributes almost \$5 billion in earnings in the region and 162,000 jobs. Almost 80 percent of the marine industry's economic activity region-wide is in Broward County, which alone accounts for a \$10.8 billion economic impact, \$3.8 billion in earnings, and 135,000 jobs. However, from 2000 to 2005, marine industry sales in Palm Beach County grew about three times faster than in Broward. But, like agriculture, the future of the marine industry is uncertain. As land values appreciate, marina owners are pressured to sell their waterfront real estate for residential development.⁴⁰

Trade and Tourism

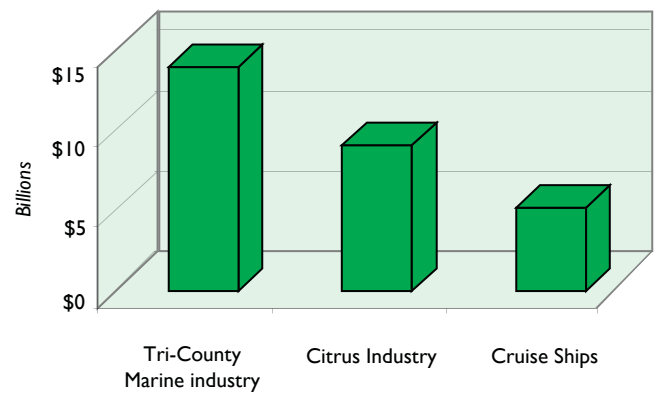
Airports

South Florida airports continued to grow in 2004, with 55 million air travelers passing through its three main airports, Miami International (MIA), Fort-Lauderdale/Hollywood International (FLL) and Palm Beach International (PBI). To a large extent, these airports complement each other. While MIA acts as a major hub for international travel (with 91 percent of international visitors hailing from Latin America or the Caribbean), FLL and PBI are principal hubs for domestic flights.

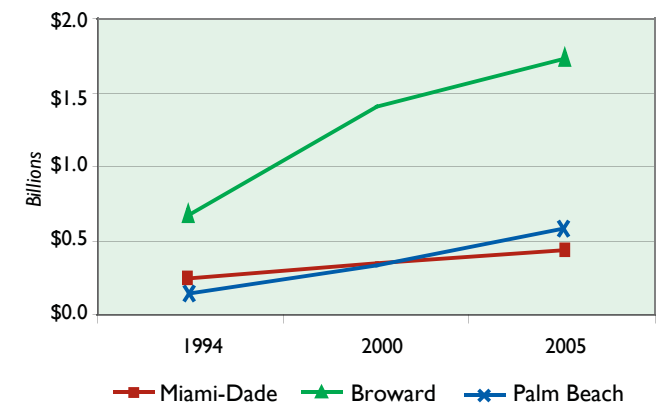
MIA continues to be the nation's premier gateway to and from Latin America. It ranks first among U.S. airports for



Comparative Economic Impact of Key Florida Industries 2005



Marine Gross Sales in South Florida 1994-2005



international freight and third for international passengers.⁴¹ Two million tons of cargo passed through MIA in 2004, increasing 8.5 percent over 2003 to reverse the decline that took place after 1998.⁴² MIA also saw a minimal increase of two percent in passenger traffic in 2004, primarily from domestic travel, after declining since 2001. The year-end passenger total at MIA was 30 million.⁴³

FLL cargo climbed 4.1 percent from 2003 to 2004, reaching 180,000 tons, reversing a trend of decline since 2000.⁴⁴ The year 2004 was the ninth consecutive year of positive passenger growth for FLL, when it reached 21 million passengers.⁴⁵ This represents a 66 percent increase since 1998, which may be due to greater passenger capacity, as well the availability of nine low-cost carriers. These two airports have a combined economic impact of \$21 billion on the region. MIA's impact is \$19 billion, generating 242,387 direct and indirect jobs. FLL's impact is \$2 billion, generating 31,000 direct and indirect jobs.⁴⁶

With over 6.5 million passengers in 2004, PBIA is considerably smaller than the region's other two major airports but provides opportunity for significant growth.⁴⁷ Future improvements include the addition of up to 24 gates, concessions in the concourses, and new exits linking the airport directly to Interstate 95, which could make PBIA a preferred alternative for residents and visitors to the northern part of the region.⁴⁸

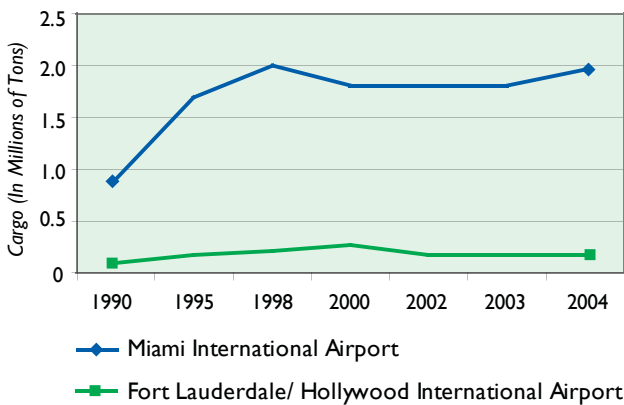


Seaports

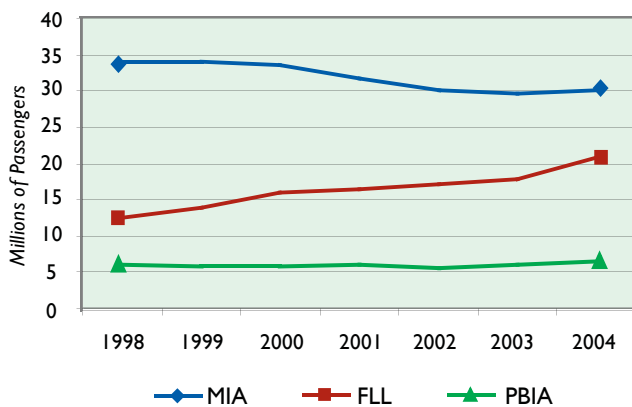
In 2002, the total economic impact of Florida's seaports was over \$50 billion and 288,696 direct and indirect jobs, expected to reach \$62 billion and 348,000 jobs by 2008. South Florida is home to three of the state's top five deep-water ports (Port of Miami, Port Everglades, and the Port of Palm Beach). Of the 13 ports in Florida, South Florida's three main ports accounted for 63 percent of the total dollar value of Florida's waterborne foreign exports and imports in 2004.⁴⁹ The Port of Miami has an annual economic impact of \$12 billion and 90,000 direct and indirect jobs in Miami-Dade County. Port Everglades has an annual economic impact of \$3.2 billion and 26,000 direct and indirect jobs in Broward County.⁵⁰

The Port of Miami's total waterborne commerce was 9.2 million tons in 2004, up three percent from 2003. However, annual gross revenue fell from \$83 million in 2003 to \$79 million in 2004, due to decreases in cruise passengers.⁵¹ Port Everglades saw an increase in waterborne commerce, reaching 25.5 million tons in 2004, and it reached \$56 million in gross annual revenue in 2004, up 57 percent from 2003.⁵² The Port of Palm Beach saw a small decrease in waterborne commerce.⁵³ By 2008, waterborne

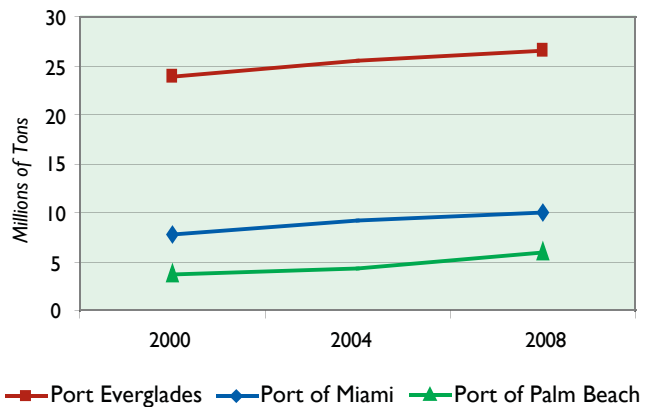
**Airport Cargo in South Florida
1990-2004**



**Air Passengers in South Florida
1998-2004**



**Waterborne Commerce at South Florida's Ports
2000-2008**

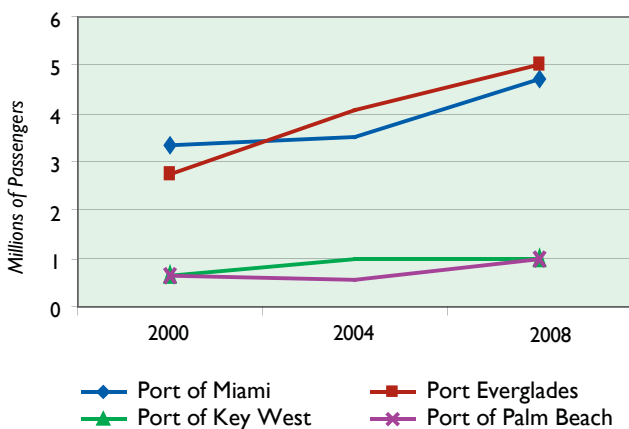




cargo in the region is expected to reach 43 million tons and constitute 30 percent of the state’s total, down from 32 percent in 2004.⁵⁴ South Florida is also home to a large shallow-water port, the Miami River. As the fifth largest port in the state, it handles about \$4 billion in cargo annually. A long-awaited dredging project, begun in 2004, will enable the port to accommodate larger vessels.

The region is a major staging area for cruise ships and is known as the “cruise capital of the world.” The Port of Miami and Port Everglades continue to lead the state in cruiseship traffic, a trend expected to continue into 2008. Mirroring gains in cargo, Port Everglades’ cruiseship industry saw a 21 percent increase from 2003, exceeding four million passengers for the first time in 2004. The Port of Miami saw an 11 percent decrease, falling to 3.5 million passengers in 2004. The Port of Key West retained its one million passengers while the Port of Palm Beach fell 15 percent to 540,000 passengers in 2004. By 2008, cruise passengers in the region are expected to reach 11.8 million and constitute 56 percent of the state’s total cruise passengers, down from 62 percent in 2004.⁵⁵

**Cruise Passengers at South Florida’s Ports
2000-2008**



International Trade

International trade is one of Florida’s largest industries. Total trade in goods (both imports and exports) is valued at \$81 billion. In 2004, exports equaled \$38 billion, 44 percent of which was accounted for by South Florida. When exported services are included, annual exports are valued at \$50 billion, one-twelfth of the state’s annual economic output, sustaining 580,000 jobs in the state. Trade within the “Floribbean” region (Florida, Latin American and Caribbean nations) accounts for 60 percent of Florida’s international trade.⁵⁶

South Florida, especially Miami-Dade County, is a hub for trade in goods and services with Latin America and the Caribbean. In 2005, the region was home to almost 1,400 multinational businesses that employed over 61,000 people. In Miami-Dade, over 46,000 are employed at international companies, accounting for four percent of the county’s total employment.⁵⁷ In addition, Miami-Dade County is home to 31 international banks, 35 bi-national chambers of commerce, and international offices for several large corporations serving Latin American and Caribbean markets. They include Home Depot, American Airlines, United Parcel Service, FedEx Corporation, Discovery Networks Latin America, HBO Latin America, and MTV Networks Latin America.⁵⁸

International Companies in South Florida, 2005		
County	# of Companies	Total Employment
Monroe	2	147
Miami-Dade	1,030	46,449
Broward	250	7,712
Palm Beach	98	6,410
Martin	6	249
St. Lucie	0	0
Indian River	7	99
Total	1,393	61,066

Free trade agreements, such as the Free Trade Area of the Americas (FTAA) and the Dominican Republic-Central American Free Trade Agreement (CAFTA), are expected to provide substantial new trade and service-related economic opportunities for Florida businesses. The United States recently ratified CAFTA, which seeks to remove trade barriers such as tariffs between the U.S. and the Dominican Republic, Costa Rica, El Salvador, Guatemala, Honduras, and Nicaragua. Enactment of CAFTA is pending ratification by the Dominican Republic and Costa Rica.



With half of the volume of merchandise trade between the U.S. and CAFTA countries flowing through Florida, the state and the region stand to gain more than elsewhere in the United States. CAFTA countries collectively represent the largest market in Latin America for Florida’s goods and services, supporting 65,000 jobs. The U.S. Chamber of Commerce estimates the potential impact at \$5.2 billion in sales, \$1.2 billion in personal income, and 37,000 new jobs nine years after implementation. The creation of a free trade zone among these nations will help the apparel and textile industries remain competitive as China emerges as the world’s largest producer and exporter of textiles and apparels. It will also produce confidence and new investment in CAFTA countries, move the Western Hemisphere closer to a free internal market, help solidify Florida’s role as the “Gateway of the Americas,” and increase Miami’s chance of being the FTAA permanent secretariat.⁵⁹

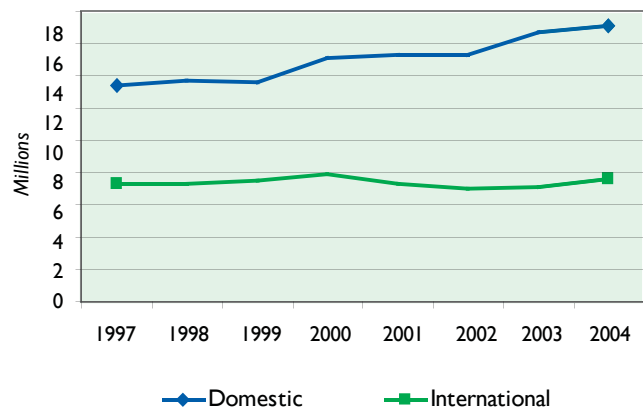
Tourism

In 2003, 75 million domestic visitors came to Florida, including 25 million to South Florida.⁶⁰ Miami-Dade, Broward, and Palm Beach counties were among the top seven destination counties in Florida, hosting 17 million domestic visitors in 2004, up 10 percent from 2000. International tourism has remained consistent

throughout the decade. In 2004, there were 7.6 million international visitors to the region’s core counties, primarily from Canada and Latin America.⁶¹ In addition, hotel occupancy rates have increased significantly in three of the region’s tourist destinations—Miami-Dade, Broward, and Palm Beach counties—with the largest increases in Broward and Palm Beach.⁶²

South Florida’s beaches are a major tourist attraction. A large portion (44%) of South Florida tourists visited the beaches, contributing a total of \$18.5 billion to the region’s economy and adding 253,000 jobs.⁶³

Tourists Visiting South Florida’s Core-County Area 1997-2004



SPOTLIGHT ON THE HURRICANES

Significant economic impacts were felt across the state and region when they were hit with four hurricanes in 2004 and two in 2005.⁶⁴ The hurricanes led to property damage to businesses, lost economic activity, and layoffs at businesses that were temporarily or permanently shut down. In 2004, the total statewide insured economic losses for the four hurricanes exceeded \$20 billion. Losses for hurricanes Frances and Jeanne, which hit hard in Martin, St. Lucie, and Indian River counties, were \$3.7 billion and \$4.6 billion, respectively.⁶⁵ Losses were greatest for the agriculture, tourism, and international trade industries, all important segments of South Florida's economy.



Employment

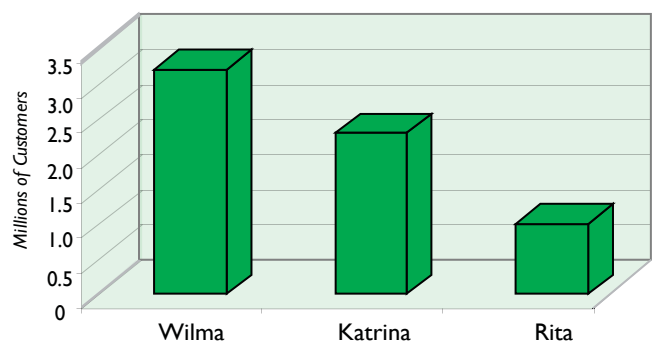
In 2004, employment loss was greatest, though temporary, in the tourism-related industries when flights and hotel reservations were cancelled, and airports and seaports were closed. It was also significant in the agriculture industry, though it did not rebound as in the tourism industry. Some sectors, such as insurance companies, utility crews, and construction companies, gained employment. Home improvement stores and hotels in unaffected areas saw an upsurge in activity. The total statewide job loss between August 2004 and September 2004 is estimated at 30,000, with about 9,500 jobs in agriculture. However, in the final months of 2004, jobs rebounded with growth of 5.1 percent.⁶⁶

With an estimated \$7.2 billion in insured losses, Hurricane Wilma in 2005 was the fourth most costly hurricane in U.S. history. Thirty-five percent of insured losses affected commercial and business property. Structural damage, along with power outages to 3.2 million customers for days or even weeks, had devastating effects on many South Florida businesses.⁶⁷ Initial damage assessment surveys showed that in Broward County, 20 percent of businesses will shut down due to damage, and 24 percent said they will have to lay off employees.⁶⁸

Impact on Agriculture

Florida agriculture, especially the citrus industry, sustained significant hurricane damage in 2004. Orchards were destroyed, and high winds and rain spread canker to citrus trees across the Treasure Coast. Statewide, 2004 orange production levels were down 27 percent, and grapefruit was down 63 percent from 2003. Damage and loss are estimated at \$3 billion. In addition, damage to greenhouse and nursery plant production is estimated at \$500 million. Damage assessments from Hurricane Wilma are not yet available. Even with a citrus crop shortage, prices are not increasing to compensate for decreased supply because demand is being met by international growers, largely from Brazil. It will be a challenge for the citrus industry along the Treasure Coast to recover its competitive advantage. "To retain rural lands . . . it is important that agriculture remain economically viable. Doing that will require local, as well as state and federal, leadership and support and strong public-private partnerships," according to Chuck Aller of the Committee for a Sustainable Treasure Coast.⁶⁹

Power Outages due to 2005 Hurricanes



FLORIDA REGIONAL HIGHLIGHTS



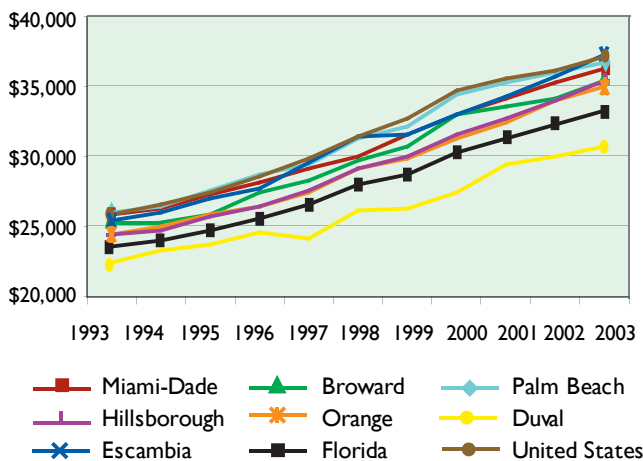
In terms of wages and employment, Florida’s economy is booming. However, wage disparity permeates this overall prosperity, particularly in South Florida, and disproportionately effects workers in low-end jobs. Due to lower rates of wage growth, the housing gap is more dramatic in South Florida than in other regions, though Central Florida is also experiencing escalating housing costs. Per capita income growth is also lagging in South Florida. Different regions are dominated by somewhat different industry sectors, suggesting a complementary niche for sectors by region.

WAGES

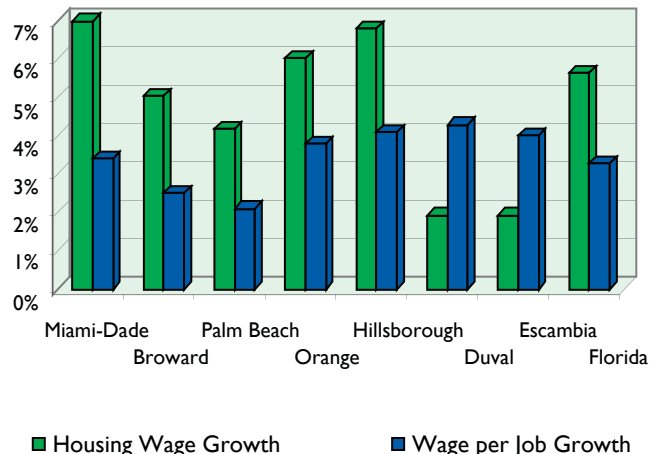
Average wages in South Florida’s core counties are comparable to those in Florida’s other regions, although wages remain lower in Escambia County in Northwest Florida. This suggests similar levels of economic vitality; however, in South Florida, there is a great deal of wage disparity that is masked by the average annual wage.

Annual wages have not kept pace with rising housing costs in the most populous counties of Florida. In South Florida’s core counties, housing wages rose at average annual rates ranging from 4.2 percent to 7 percent from 2000 to 2003, while wages only rose at average annual rates between 2.2 percent and 3.4 percent. The gap is also apparent in Orange and Hillsborough counties, where housing wages rose at average annual rates ranging between 6.0 percent and 6.8 percent, while wages rose at average annual rates between 3.8 percent and 4.1 percent. Duval, the most populous county of Northeast Florida, and Escambia, the most populous county of Northwest Florida, experienced the opposite trend. Such stark differences between wages and the cost of living are pricing residents out of the housing market in major metropolitan areas of Florida.

**Average Wage Per Job
in the Core Counties of Florida's Regions
1993-2003**



**Average Annual Housing Wage Growth
vs.
Average Annual Wage Growth
2000-2003**



PER CAPITA PERSONAL INCOME

Broward and Palm Beach counties both surpass the state and other regions in per capita income. Miami-Dade's per capita income is lower than all but Escambia. However, from 1993 to 2003, per capita income growth rates in Miami-Dade, Broward, and Palm Beach counties were well below rates in Orange, Hillsborough, Duval, and Escambia counties. South Florida derives a greater share of its personal income from unearned income and less from wages, indicating a greater share of retirees and wealthy residents in the region.

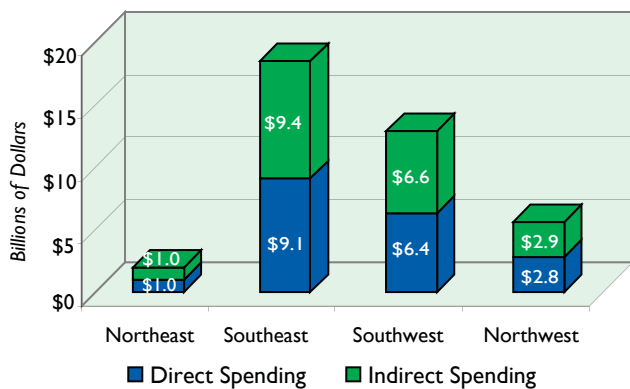
INDUSTRY SECTORS

Compared to Florida's other major urban regions, South Florida is expected to lag in the growth of jobs in some high-wage sectors. Northeast Florida is projected to lead in higher paying financial activities, and though South Florida will grow its business and professional services sector, Tampa Bay is expected to dominate. South Florida's strongest sector will continue to be trade, transportation, and utilities, but will also include large education and health services and professional and business services sectors. Central Florida will lead in leisure and hospitality.

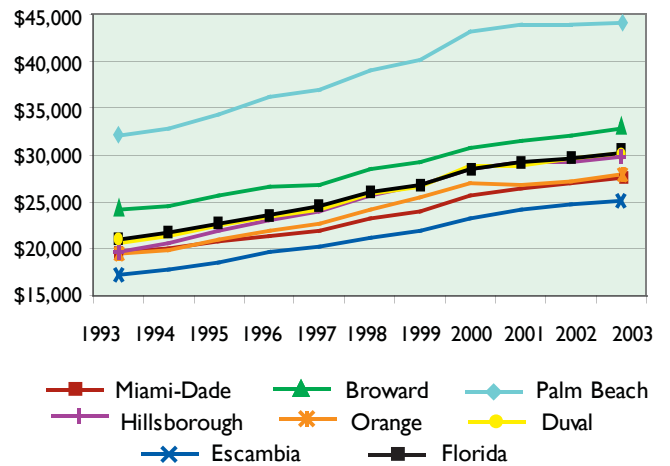
BEACH TOURISM

Although Central Florida is the strongest tourist market in the state, the beaches draw visitors to the southern coasts. Beach tourism has a significant economic impact on both South Florida (\$18 billion) and Southwest Florida (\$13 billion). It also provides 253,000 jobs in South Florida, 177,000 in Southwest Florida, 79,000 in Northwest Florida, and 27,000 in Northeast Florida.

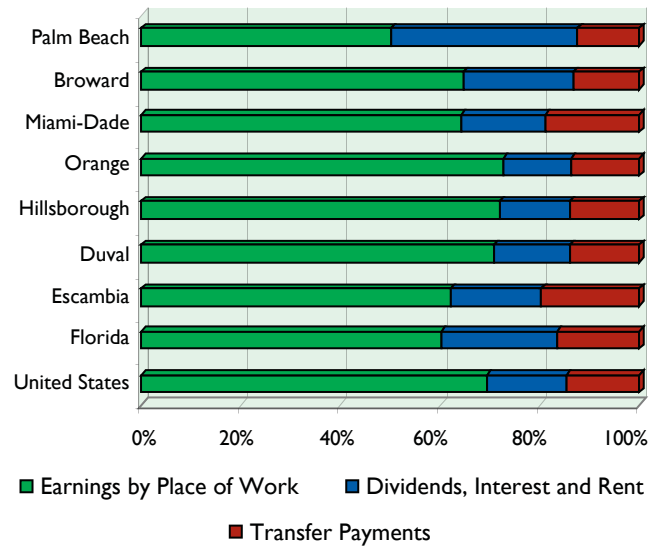
Economic Impact of Regional Beach Tourism in Florida



Per Capita Income in the Core Counties of Florida's Regions 1993-2003



Sources of Personal Income 2003



COMMENTARY FROM THE EXPERTS



**Dr. Bruce Nissen, Director
Center for Labor Research & Studies
Florida International University**

Past 20 years. Miami's role as a world city connected to our neighbors in the south is a key change in the economy. Miami has become a Latin American center for banking and finance. The nature of immigrants has changed. For Cuba, for example, it's been lower and lower down the socioeconomic scale from the beginning of the Cuban Revolution. First, you had the very rich coming, and then you had the upper-middle class, then the middle class, and now immigrants coming from Cuba tend to be working class. Now we have more racial divides and more immigrants from Central American countries.

Inequality has been growing. Miami-Dade County has the second highest average wage of Florida counties, and also is among the highest poverty counties in the nation. How could the county be one of the richest in the state and yet have some of the highest poverty rates? The answer is: The money is here but distributed so unequally. This is a high-inequality area of the nation and the state.

If you are an immigrant and don't speak much English, even if you are educated, you will more than likely end up in the retail or service business. People in poverty mostly work in the retail trades where there are few tips, usually none. Underreporting of tipped income is greatest for those who work in upscale types of establishments, not for those working in establishments catering to the working population. Most low-wage immigrants or minorities are not making a huge amount of money from tips.

Next 20 years. In 20 years from now, Florida will continue to have jobs skewed toward tourists and wealthy retirees because we are a place for the middle class and upper class to vacation and to retire. We are stuck with the structural fact that our economy is skewed toward what are to some degree these low-wage industries. We have an overrepresentation of retail jobs, an overrepresentation of leisure and hospitality and lodging and those kinds of employment, and there is just no way out of that fact. We've got to start raising the floor both on wages and conditions for those low-wage workers; otherwise, we are facing increased crime rates, bad health care, all those things that go along with high poverty.

What needs to be done. Try to attract more high-skilled and "high-value" industries and employers into the state. We've got to try to move the mix of jobs in Florida to industries and occupations that add higher value and have a higher wage. I believe that because of the "fun in the sun" syndrome and the warm weather, and because of some of the "world city" and banking and other kinds of nodes that we have down here, there might be a shot at building a high-tech sector in South Florida. The thing that makes that unlikely is Florida's refusal to invest in the proper infrastructure to really make it happen—the refusal to fund the kind of world-class education system you'd have to have to really make that work.

We need to build up community-based groups, what I call the "social justice infrastructure." We need to organize and rebuild social movements that address trends toward low wages and inequality. If we can build up the various pieces of the "social justice infrastructure" to give a voice to working people and develop vehicles for a collective immigrant voice, then we will have the basis for a progressive future for Florida. We especially need a lot more organizing in Latino communities.



**Mike Jones, Executive Director
Economic Council of
Palm Beach County**

Past 20 years. Looking back 20 years ago, the Palm Beach County economy was heavily dependent on agriculture and tourism. Global competition, however, has reduced the heavy dependence on vegetable growing, and the sugar and citrus industries are now under increasing pressure because of trade policies.

Anything that diversifies your economic base should have a positive impact. What remains to be seen is the degree to which it multiplies. The same pressures that make it difficult to remain competitive in a single source, sole product, manufacturing economy would apply to some of the components of the biotech industry. Scripps is just part of the puzzle—the bigger potential component is the research and the spin-off businesses that may result.

Next 20 years. We have been prioritizing for the last four years—education, transportation, housing, and growth and development. The immigrant population, the less

educated, the less job ready, strain available community resources. The elderly who come here with a nest egg, if they haven't accurately projected, may become another group. There's a growing awareness that the market area extends beyond governmental jurisdictional lines; more and more organizations realize their success is dependent on the ability to do business within a wider regional market area economy. One of the good things that has recently happened here is the public support to build schools in Palm Beach County.

What needs to be done. I see a bright future, but I don't see any silver bullets. We must continue to strive to develop the basic infrastructures that make life pleasant—good schools, friendly neighborhoods, ease of mobility, affordable housing, and a mixture of housing. I think people who move to South Florida want the option to rent or own, and we have some policies that are making it difficult, if not impossible, to find affordable rentals, not just affordable to buy. The critical infrastructure needs are not being funded at the levels necessary to keep pace with growth. If we don't have more Scripps and more entrepreneurs, and don't remain on the cutting edge of technology advancements, and diversify our economy, we will inevitably become increasingly dependent on the service industry, and the quality of life will go down. But overall, we have more opportunities than we do challenges.

I believe from a business standpoint, this is a frontier. I don't think the business community has worked collaboratively to take full advantage of its potential. Business must play a leadership role. It's challenging to get the business community to come together on issues and speak with one voice to demand policy changes. Once we master that, we can harness the untapped resources.



**Mason Jackson, President/CEO
Workforce One, Broward County**

Past 20 years. About 87 percent of job growth is in jobs that pay below the current median wage—retail, hospitality—and housing costs are increasing in some places as much as 70 percent a year. If teachers can't afford to live here, education suffers. We've got to do the kind of economic development that is going to bring in a diversified economy and better jobs at higher wages and higher skills. Another issue is that we are a melting pot with increasing numbers coming in, and many people lack the basic skills and language skills to take the higher wage/higher skill jobs. Therefore we may not be able to support high numbers of highly technical jobs.

Next 20 years. I see a changing labor marketplace, which changes at an ever-increasing rate. I see a difficulty in projecting those changes, even figuring out what they are as they happen. It will be difficult to keep the communication lines open between the business community and those responsible for turning out our workforce. Public institutions will be challenged to keep up with the changes. Over 75 percent of jobs require some kind of training beyond high school. Getting training or degrees in the mid part of the day, which is traditional in institutions, will not work anymore. There will need to be more night and weekend classes, along with distance learning. Education will have to become more flexible and nimble.

What needs to be done. We need a world-class education system and a good quality of life to get a handle on affordable housing and transportation to attract people to come here. This is, more than anything else, a communications problem. As long as these problems remain hidden, and not on the public agenda, they will not be solved. I'm positive that these problems are solvable. Do we have the will to do it? Do we have the kind of short-term sacrifice for long-term gain? That, I'm not so sure about.



**Ralph Marrinson, Chairman
Regional Business Alliance**

Past 20 years. The '70s began the boom and the '80s took off. At that time, it became apparent to us that the communities needed to work together. Nobody envisioned the real growth in the '80s of the tri-county area. Therefore, we'd better open our eyes and see that other counties, such as Indian River, are involved in this growth.

Next 20 years. This region is exciting, dynamic, culturally mixed; it has a unique flavor in different sections with economic opportunities. The changes that have taken place have not impacted the region evenly, but one of the common impacts is transportation. I predict that within 8 to 10 years there will be another north-south rail system and a concerted effort to develop the east-west linkage.

What needs to be done. Education is number one—equal funding is necessary as an influx of population continues. We are the testing laboratory for the nation as we grow in diversity. We will have to become a multilingual society. We need to work together for economic growth, involving a diverse economic base to bring a variety of employment opportunities. We have begun to do that but need to keep moving along. We are no longer competing with Tampa or Orlando but are competing internationally.

Conclusion

TOWARD A PROSPEROUS AND SUSTAINABLE FUTURE

Recent events in South Florida suggest that the future **prosperity** of the region is closely tied to research investments. Commenting on the decision to locate Scripps Research Institute at the FAU MacArthur campus in Jupiter, Governor Bush stressed the importance of regional collaboration. “In order for the vision of Scripps Research Institute to be successful in creating high-wage jobs, collaboration is going to be key.”¹ *The Miami Herald* applauded the Scripps decision as a boost to the entire region because it “will lift everyone’s boat by drawing more high-tech research and development outfits to the area” and “signal a genuine sea change in what sort of business investments come our way, further diversifying the region’s economy.”² The location of Scripps invites collaboration among existing and planned high-tech research investments in the region. North of Scripps lies Harbor Branch Oceanographic Institution, the University of Florida/IFAS Indian River Research and Education Center, and the U. S. Department of Agriculture’s Horticultural Research Laboratory in Fort Pierce. Another biomedical research institute, the Burnham Institute, is proposed for Port St. Lucie. South of Scripps is the reemergence of the IBM facility at T-REX in Boca Raton. The U.S. Geological Survey will collaborate with Florida universities at the Florida Interdisciplinary Science Center research and education complex in central Broward. Finally, the University of Miami plans a biotechnology research complex in the City of Miami in concert with the Jackson Memorial Medical Center.

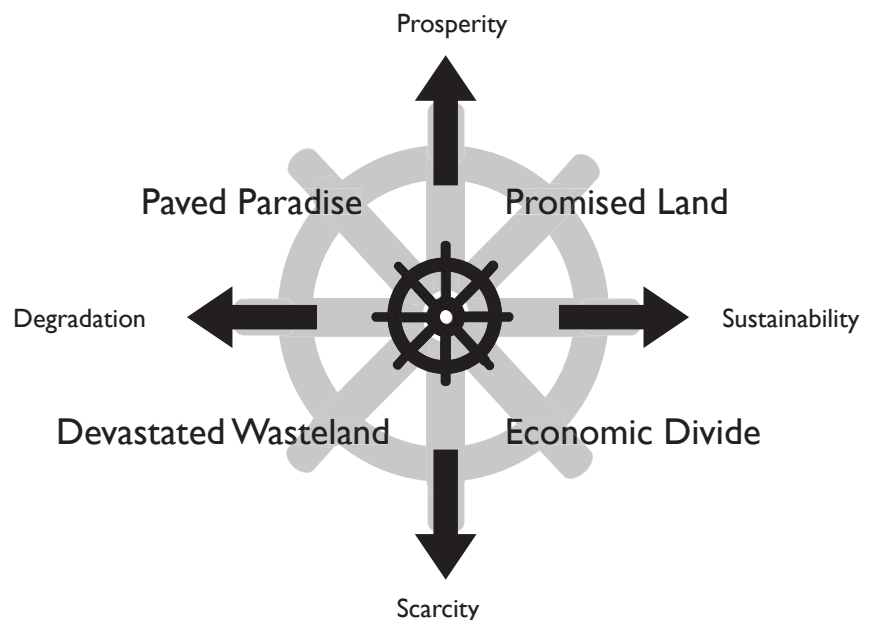
Any vision of the future economic prosperity of the region must be balanced with efforts to achieve environmental **sustainability**, especially Everglades restoration. Continuing the present pattern of sprawl development will challenge the region’s ability to build and maintain its physical infrastructure, maintain its hydrology, and restore its wildlife habitats.

While the regional realities of daily living may be self evident, the ability to act regionally lags behind that reality. Governmental decision-making remains highly fragmented, with each

community working to maximize its own tax base often in competition with its neighbors. South Florida is not significantly different from other regions in this regard. There is little political will to act regionally instead of locally.

South Florida and Florida’s regions in general are further challenged by the fact that they are relatively young, as measured by the age of higher education institutions, major foundations, and cities reaching a significant threshold of population. Furthermore, their population growth is significantly driven by people who were not born here and therefore have a shorter acquaintance and attachment to these places.

There are two overriding challenges that South Florida must be able to meet as a region. First, it must be able to grow physically in a manner that is sustainable. Second, it must be able to develop its economy in a way that assures prosperity. Clearly these two challenges are related, but succeeding at one does not assure success with the other. Some alternative futures might be based on differing degrees of success at meeting the goals of a sustainable and prosperous region. Imagine four alternative futures by 2030. These four are defined by success or failure at achieving sustainability and prosperity. Now imagine that the region is at the crossroads of these two axes. Its future will either have more or less prosperity and sustainability than it has now.



Promised Land. The future would be one in which both goals are achieved. By 2030, South Florida would be a region in which Everglades habitats and the underlying water supply were significantly restored. It would be a place with reduced social disparities because the economy has generated more high-paying jobs. It would also be a place with reduced congestion because of an improved balance between jobs and housing.

Paved Paradise. Prosperity would have been achieved, but at a significant cost to the region's environment. This could be a future in which urban growth was allowed to push farther west and north in order to maintain current forms of development, displacing wetlands and agriculture, defeating Everglades restoration, and aggravating roadway congestion. Prosperity could be built by attracting more international capital to the region. Other residents would presumably benefit from the trickle down effects of this wealth.

Economic Divide. Citizens of the region would enjoy a good physical environment, but poor socio-economic conditions. Such a future could occur if environmental sustainability were achieved without a vision for how urban areas deal with population growth. Increased competition for limited land could raise housing costs, further aggravating social disparities and impacting the recruitment of new industries.

Devastated Wasteland. In this future, neither the goal of prosperity nor environmental protection has been achieved. This is a likely outcome if current governmental fragmentation prevails, and each community assumes a go-it-alone stance. Something that would definitely tip the balance toward this quadrant is a failure of the Everglades restoration project, especially if it were combined with the impact of some major devastating hurricane, such as Hurricane Katrina's damage to the Gulf Coast.

The scenarios described above will help South Florida understand the need for a regional vision. It will also help the region measure its progress in moving toward that vision. This report of trends and projections represents markers on the map to guide the visioning process. We hope you will agree that the region is at a critical crossroads in charting its direction.

South Florida's Regional Initiatives

South Florida's initiatives consist of state, regional, and sub-regional collaborations. These efforts are helping to solidify the identity of the region and may bring about positive changes in regional policy and action. They range from county visioning, to collaboration among

partners in the larger region, to specific business economic efforts to coalesce the region.

The Urban Land Institute developed state strategies for regional cooperation that focused on recommendations to support regions. They developed four key recommendations to build regionalism in Florida, beginning with gubernatorial leadership on statewide regional cooperation, regional visions and action plans, state agency cooperation to promote regionalism, and state support for progress toward regional visions. With state and local support and direction, Florida's regions have the ability to develop their own visions, unique to their regions. These visions will help map long-term goals for South Florida's future, as well as that of other regions.³

Many institutions are trying to help guide the future of the South Florida region. Florida Atlantic University's CUES administers the South Florida Regional Resource Center to provide community planning support and leadership education, linking citizens to policy decisions. RESEARCH-SouthFlorida is developing collaboration among research institutions. The Committee for a Sustainable Treasure Coast developed a long-range plan for sustainable development in Treasure Coast counties. The Economic Development Research Institute is working on economic studies and initiatives for the region. The Regional Business Alliance is focusing on three specific issues that cross county boundaries—transportation, education, and housing. The Tri-County Leadership Council is educating leaders on regional collaboration. The iCoast, composed of the region's core counties, is focusing on economic development and investment in the region's technology sector, while the Research Coast is addressing economic development in Treasure Coast counties.

The reality of the issues facing Florida and its regions in the 21st century requires collaboration, but it is impeded by a lack of shared identities and goals, and the absence of regional leadership and state support for regionalism. If Florida is to successfully address its complex issues, reach its ambitious economic goals and retain the quality of life that Floridians expect, the future will likely hold a greater emphasis on and acceptance of regional solutions by the state, regions, counties, and municipalities. Clearly, the future of the region is uncertain. Which direction it takes will depend on intentional and forward-looking policies established now and effectively implemented. These policy choices will determine whether South Florida faces a positive or negative future. Thus, the destiny of the region's future citizens is being determined today.

Endnotes

INTRODUCTION

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- 7 From 2000 to 2004, growth rates were as follows: Monroe, 2%; Miami-Dade, 6%; Broward, 6%; Palm Beach, 10%; Martin, 9%; St. Lucie, 17%; and Indian River, 12%.
- 8 U.S. Census Bureau. (2005, April). *2004 Population Estimates*. Retrieved February 6, 2006 from http://www.census.gov/Press-Release/www/releases/archives/pio_table2_est2004.pdf; U.S. Census Bureau. (2005, April 14). Flagler, Fla. nation's fastest-growing county. *Newsroom*. Retrieved June 10, 2005 from <http://www.census.gov/Press-Release/www/releases/archives/population/004654.html>; U.S. Census Bureau. (2005, June 30). Port St. Lucie, Fla., is fastest-growing city, census bureau says. *Newsroom*. Retrieved June 30, 2005 from <http://www.census.gov/Press-Release/www/releases/archives/population/005268.html>; Broward grew from 96,390 in July 2003 to 101,486 in July 2004; St. Lucie grew 12% from 105,707 to 118,396, 18th highest among cities with populations over 100,000; Port St. Lucie also had the 7th largest numerical increase, 12,700.
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PEOPLE

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 - 17 Up from 17% in 2000.
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 - 21 In 2003, its composition was 44% white, 19% black, and 35% Hispanic.
 - 22 In 2003, 67% of seniors were white, 7% were black, and 24% were Hispanic; There is projected to be only a slight shift by 2030, to 62% white, 11% black, and 26% Hispanic.
 - 23 Bureau of Economic and Business Research. (2004) *Florida Population Studies: Bulletin 139, 37.3*. Gainesville, FL: University of Florida; In 2003, 19% of the population was under 18 years old, the working age population was 57%, and the senior population was 25%.
 - 24 U.S. Census Bureau. American Community Survey. (2005). *2003 Multi-year profiles*. Retrieved July 11, 2005 from <http://www.census.gov/acs/www/Products/Profiles/Chg/2003/ACS/index.htm>; In 2003, they were 10% in Broward, 12% in Palm Beach, and 18% in Miami-Dade. From 2000 to 2003, the state rate was consistent at 13%. The national rate remained at 12% from 2000 to 2002 then hit 13% in 2003.
 - 25 U.S. Census Bureau. American Community Survey. (2005). *Data profiles (2002-2004 Multi-year profiles)*. Retrieved July 11, 2005 from <http://www.census.gov/acs/www/Products/index.htm>.
 - 26 U.S. Census Bureau. American Community Survey. (2005). 2003 Multi-year profiles. Retrieved July 11, 2005 from <http://www.census.gov/acs/www/Products/Profiles/Chg/2003/ACS/index.htm>; In Miami-Dade, 24% of youth and 23% of senior citizens live in poverty. In Broward County, the poverty rate among the youth is 16% and the rate for senior citizens, 10%. In Palm Beach County, the youth poverty rate is 13% and the senior poverty rate is 8%.
 - 27 Education Information & Accountability Services. Florida Department of Education. (2004, April). *Florida Information Note 2004-22F: Free/reduced price lunch eligibility*. Rates are 36% in Monroe, 40% in Broward, 42% in Palm Beach, 32% in Martin, 40% in Indian River, 63% in Miami-Dade, and 52% in St. Lucie counties.
 - 28 49% in Miami-Dade, 41% in Broward, 39% in Palm Beach.
 - 29 National Low Income Housing Coalition. (2004). *Out of reach-2004*.
 - 30 U.S. Census Bureau. American Community Survey. (2005). *2003 Multi-year profiles*. Retrieved July 12, 2005 from <http://www.census.gov/acs/www/Products/Profiles/Chg/2003/ACS/index.htm>.
 - 31 Swanstrom, T., et al. (2004, October). *Pulling apart: Economic segregation among suburbs and central cities in major metropolitan areas*. Washington, D.C.: Metropolitan Policy Program, Brookings Institution.
 - 32 Florida Taxwatch Center for Educational Performance & Accountability. (2005, February). *Florida's financial commitment to K-12 education: How much money is enough?*
 - 33 Department of Education. (2005). *School district data*. Your Florida Department of Education. Retrieved October 4, 2005 from <http://www.firn.edu/doe/eias/flmove/county.htm>.
 - 34 Florida Taxwatch Center for Educational Performance & Accountability. (2005, February). *Florida's financial commitment to K-12 education: How much money is enough?*
 - 35 "A" schools increased from 33% of schools in 2001/02 to 47% in 2003/04. In that same time period, "B" schools decreased slightly from 20% to 17%, "C" schools decreased from 32% to 25%, "D" schools decreased from 12% to 9%, and "F" schools increased from 2% to 4% percent.
 - 36 Two schools that received Fs that have less than 90% lunch program eligibility are special needs schools for the mentally and physically disabled and were graded for the first time this year. In Miami-Dade, one of the F schools is a special needs school.
 - 37 Florida Department of Education. (2005). *School district data*. Your Florida Department of Education. Retrieved July 25, 2005. Data available from <http://schoolgrades.fldoe.org/0405/>.
 - 38 Florida Department of Education. (2005). *Reports: Education Information & Accountability Services*. Your Florida Department of Education. Retrieved July 15, 2005. Data available from <http://www.firn.edu/doe/eias/eiaspubs/reports.htm>; Miami-Dade increased from 53% in 1998/99. Broward and Palm Beach increased from 54% and 58%, respectively, in 1998/99. In Miami-Dade graduation rates increased to 61% in 2003/04. Broward and Palm Beach graduation rates both reached 66% and Martin, St. Lucie, and Indian River counties reached more than 80%.
 - 39 Education Information & Accountability Services. Florida

- Department of Education. (2005, April). *Statistical Brief, 2005-20B: Florida's public high school graduation rates, 2004/05*; In 2003/04, graduation rates for white students ranged from 74% in Miami-Dade to 90% in Martin County. For black students they ranged from 48% in Palm Beach County to 70% in Martin County. Hispanic graduation rates ranged from 57% in Palm Beach County to 76% in St. Lucie County.
- 40 The dropout rates in 2003/04 were 4% in Monroe, 5% in Miami-Dade, 1% in Broward, 3% in Palm Beach, 1% in Martin, 3% in St. Lucie, 1% in Indian River, and 3% in Florida.
- 41 Education Information & Accountability Services. Florida Department of Education (2005, January). *Florida Information Note, 2005-14F: Dropout demographics in Florida's public schools, and dropout rates*; Among blacks, dropout rates generally range from 1% to 5%, but reach 7% in Monroe County. Among Hispanics, rates generally range from 1% to 5%, but reach 6% in Monroe County; Dropout rates among whites range from 0.4% to 3.5%.
- 42 South Florida's mean score in 2002/03 was 989, compared to a state score of 996 and a national score of 1026.
- 43 The College Board SAT. (2003). *Florida Report- 2003 College-bound seniors: A profile of SAT program test takers*. Retrieved July 10, 2005 from http://www.collegeboard.com/prod_downloads/about/news_info/cbsenior/yr2003/pdf/2003_FLORIDA.pdf; Average SAT scores were 992 in Monroe, 930 in Miami-Dade, 967 in Broward, 1004 in Palm Beach, 1015 in Martin, 994 in St. Lucie, and 1023 in Indian River.
- 44 Department of Education. (2005). *Profile of Florida school districts: Financial data*. Florida Department of Education. Retrieved July 4, 2005 from <http://www.firn.edu/doe/fefp/profile.htm>; Florida Department of Education. Data file of SAT scores for all seniors in Florida public schools in the Class of 2004. For the seven districts requested (Broward, Miami/Dade, Indian River, Martin, Monroe, Palm Beach, St. Lucie) a table was built by Martha Miller to show the number of 2004 test takers, verbal score, math score, and the combined score for the following racial-ethnic groups: white non-Hispanic, African American, Hispanic, Asian, and other (Native American + Multiracial); Florida Department of Education. (2004, August). *SAT Trends: Florida and the Nation*. Retrieved July 4, 2005 from <http://www.firn.edu/doe/evaluation/pdf/sat.pdf>; In the region, in 2004 the average scores of black students ranged between 124 and 240 points lower than white students. Among Hispanic students, there was a 10 to 100 point lag.
- 45 Florida Department of Education. (2004, August). *SAT trends: Florida and the Nation*. Retrieved July 4, 2005 from <http://www.firn.edu/doe/evaluation/pdf/sat.pdf>.
- 46 Florida Taxwatch Center for Educational Performance & Accountability. (2005, February). *Florida's financial commitment to K-12 education: How much money is enough?*; Forster, G., & Greene, H. (2004, September). *The teachability index: Can disadvantaged students learn?* New York: Manhattan Institute.
- 47 Education Trust, Inc. (2004, Spring). *Education watch: Florida key education facts and figures*; Florida Taxwatch Center for Educational Performance & Accountability. (2005, February). *Florida's financial commitment to K-12 education: How much money is enough?*
- 48 Hobbs, E. (2005, June 11). Judge dismisses lawsuit on school-funding formula. *Sun-Sentinel*, p. 7B; (2005, June 15). Lawmakers put politics ahead of our children. *Key-note*, p. 6
- 49 Florida Taxwatch Center for Educational Performance & Accountability. (2005, February). *Florida's financial commitment to K-12 education: How much money is enough?*; Council for Education Policy, Research and Improvement. (2003, December). Career education: Florida's forgotten economic development plans. *Insight*, 1.2.
- 50 The rate for these counties is 65%.
- 51 Florida Department of Education. Florida Education & Training Placement Information Program. (2004, October). *2002-03 Florida public high school graduates' outcomes by ethnicity & gender*; See also *Florida Education and Training Placement Information Program*; In Monroe, Miami-Dade, and Broward counties, 65% of high school graduates go on to post-secondary education. In Palm Beach, St. Lucie, and Indian River counties, the rate is just below 60%, and in Martin County it is 68%.
- 52 *Ibid.*; These numbers do not include students who went to post-secondary school in another state; Rates among white students ranged from 67% in Palm Beach County to 71% in Broward and Miami-Dade counties. Among black students, they ranged from 48% in Palm Beach to 56% and 58% in Broward and Miami-Dade counties. Likewise, rates among Hispanic students were lowest in Palm Beach (55%) and reached 63% and 66% in Broward and Miami-Dade counties.
- 53 These include Florida International University, University of Miami, St. Thomas University, Nova Southeastern University, and Barry University. Data was not available by race and ethnicity for Lynn University and Palm Beach Atlantic University, which account for only 5% of South Florida college students.
- 54 Individual university factbooks: Florida Atlantic University. (2005). *Data archives: Factbooks*. Data available from <http://iea.fau.edu/inst/arch.htm>, Florida International University. (2004). *Planning & institutional effectiveness: Factbooks*. Data available from <http://www.fiu.edu/~opie/spdi/fbhome.htm>, University of Miami, Planning and Institutional Research. (2005). *Factbook*. Data available from http://www.miami.edu/UMH/CDA/UMH_Main/0,1770,2409-1;42532-3,00.html, Nova Southeastern University, Research Planning and Governmental Affairs. (2006). *NSU factbook*. Data available from <http://www.nova.edu/rpga/factbook/>, Florida Community College System. (2005). *Community college fact book library*. Data available from http://www.firn.edu/doe/arm/cctcmis/pubs/factbook/factbook_main.htm; This does vary by university. For instance 60% of Florida International University students were Hispanic and 21% white. At Florida Atlantic University, 59% were white and 17% Hispanic. Black students comprised about 15% of students at each.
- 55 About 85% of total students at Florida Atlantic University and Florida International University are from the region.
- 56 Florida Atlantic University, Office of Institutional Effectiveness & Analysis. (2005). *Headcount enrollment by state residency, Fall 1999-2004*. Retrieved July 10, 2005 from <http://www.fau.edu/academic/iea//factbk/state04.htm>; Florida International University, Office of Planning and Institutional Effectiveness. (2005). *Fall 2004 Enrollment*

- by Florida county. Institutional Research. Retrieved July 10, 2005 from http://www.fiu.edu/~opie/fb04_county04.htm; University of Miami. (2005). *Fact finder 2004-2005*. About UM. Retrieved July 10, 2005 from <http://www.miami.edu/facts/>; Within the community colleges, the racial and ethnic distribution was 3% white, 22% black, 38% Hispanic and 9% other. Within the universities, the distribution was 40% white, 17% black, 30% Hispanic, and 12% other.
- 57 Almost 9,000 completed their Associate of Arts programs, while just above 3,000 completed their Associate of Science programs. Over two-thousand received vocational or technical certificates.
 - 58 Department of Education. (2005, February). *The factbook: Report for the Florida Community College System*. Retrieved July 5, 2005 from <http://www.firn.edu/doe/arm/cctcmis/pubs/factbook/fb2005/factbk05.pdf>.
 - 59 Florida Atlantic University, Florida International University, University of Miami, and Nova Southeastern.
 - 60 Individual university factbooks: See endnote 54.
 - 61 Graduation rates are only available for the whole student body at the public universities. They are not available for the private universities or by race and ethnicity.
 - 62 Florida Department of Education. (2005). *Report on state university system accountability measures, December, 2004*. Retrieved July 10, 2005 from http://www.flbog.org/planning/accountreport/2004_UnivAccountReport.pdf; Florida Atlantic University's graduation rate was 35%, Florida International University's graduation rate was 47%. Florida's is 58%.
 - 63 Bureau of Economic and Business Research. Warrington College of Business Administration. (1998-2004). *Florida statistical abstract*. Gainesville: University of Florida; Voters: 2004 Data retrieved from individual county electoral departments.
 - 64 The other core counties, Broward and Palm Beach, declined 15% and 8%, respectively.
 - 65 650 in 2003/04.
 - 66 Florida Department of Juvenile Justice. (2005). *2004-2005 Delinquency profile*. Retrieved August, 2005. Data available from http://www.djj.state.fl.us/Research/Delinquency_Profile/0405_Profile.html; Broward, Palm Beach, St. Lucie, and Indian River counties all had slight increases of about one percent. Monroe County had a large increase of 10%.

PLACE

- 1 *Comprehensive Everglades restoration plan*. 2005 Report to Congress (8-23-05 Draft); South Florida Water Management District. (2004, November/December). *Water Matters*. West Palm Beach: South Florida Water Management District.
- 2 *Comprehensive Everglades restoration plan*. 2005 Report to Congress (8-23-05 Draft).
- 3 King, R.P. (2006, January 26). Environmentalists call Everglades restoration lacking. *Palm Beach Post*. Retrieved January 30, 2006 from <http://www.palmbeachpost.com/>.
- 4 Land Acquisition Task Team, South Florida Ecosystem Restoration Task Force. (2004, December 1). *South Florida ecosystem restoration land acquisition strategy; Comprehensive Everglades restoration plan. 2005 Report to Congress* (8-23-05 Draft); As of December 2004, 271,853 acres had been acquired for water projects (56%) of which have already been acquired, 1,686,844 (99%) had been acquired for habitat restoration, and 166,000 (51%) had been acquired for CERP projects and overlap with land for other water and habitat projects.
- 5 South Florida Ecosystem Restoration Task Force. (2004, September 15). *Coordinating success 2004: Strategy for the restoration of the South Florida ecosystem and tracking success: Biennial report for August 2002-July 2004* (Draft 5). Snowy Egrets and Tri-colored Herons are counted together; Call, E., & Cook, M. (Eds.). (2005, September). *Wading Bird Report* (Vol. 11). West Palm Beach, FL: South Florida Water Management District; Cook, M., & Grozier, G. (2004, November). *Wading Bird Report* (Vol. 10). West Palm Beach, FL: South Florida Water Management District.
- 6 South Florida Water Management District. (2004, June). *UEC water supply plan*; Louis Woehlcke, South Florida Water Management District. (2005, June 13). *LEC water supply plan update: Baseline projections of public water supply* (personal communication, September 7, 2005); The population projections used in the UEC WSP are 319,426 in 2000 and 484,900 in 2025. However, the population is growing faster than was expected at the time of the UEC Plan, making water demand projections a little lower than might now be expected.
- 7 Division of Water Resource Management. Florida Department of Environmental Protection. (2005, June). *2004 Reuse Inventory*.
- 8 FL Stat., Ch. 2005 § 290 (2005).
- 9 Dewitt, D. (2005, May 22). Bill plays catch-up with state's growth. *Sun-Sentinel*, p. 5B; FL SB 444 (2005); Florida Department of Environmental Protection. (2004). Press Release: Secretaries applaud passage of growth management reform. (2005, May 12). Retrieved September 7, 2005 from http://www.dep.state.fl.us/secretary/news/2005/05/0512_01.htm.
- 10 R. McTear, Florida Department of Environmental Protection. (personal communication, February 16, 2005); Once contamination is identified and TMDLs established, the Basin Management Action Plan will be developed and implemented to achieve the TMDL. This information is not officially signed by the Secretary and could change when new data becomes available.
- 11 Critics argue that constantly rebuilding the shoreline reduces biological diversity, impacts local fishing, and harms near-shore reefs. They advocate for the reassessment of coastal development policies.
- 12 Roxanne Dow, Florida Department of Environmental Protection. (personal communication, September 21, 2005); Florida Department of Environmental Protection. (2004). Beach erosion control program, Bureau of Beaches and Coastal Systems. Retrieved October 21, 2004 from <http://www.dep.state.fl.us/beaches/programs/bcherosn.htm>; Bureau of Beaches and Coastal Systems. (2005, June). *Critically eroded beaches in Florida*. Florida Department of Environmental Protection. Division of Water Resource Management. Over 475 miles of the state's 825 miles of

- beaches were eroded; 365 were critically eroded. South Florida had 130 miles of erosion, 121 were critically eroded.
- 13 From 724 in 2003 to 904 in 2004.
 - 14 Florida Department of Health. (2004). *Florida healthy beaches program*. (2004). Data available from <http://es-etappsdo.h.doh.state.fl.us/irm00beachwater/default.aspx>; Carney, K., & Hammond, R. (2004, Spring/Summer). Coastal water quality and the public. *Coastal Currents*. Florida Coastal Management Program.
 - 15 National Resources Defense Council. (2005, July). *Testing the waters: A guide to water quality at vacation beaches*.
 - 16 Clean Beaches Council. (2005). *Blue wave beaches of Florida*. Data available from <http://www.cleanbeaches.org/bluewave/fl.cfm>; Clean Beaches Council honors Broward. (2004, June 25). *South Florida Business Journal*.
 - 17 Bureau of Business and Economic Research. (2005) *Florida Statistical Abstract 2005*. Gainesville, FL: University of Florida; In Monroe County, catches fell from 11 million pounds in 2000 to 7 million pounds in 2001, but began increasing, reaching 8.1 million in 2003; Excluding Monroe County, shellfish catches went from 1.2 million pounds in 1990 to 2.5 million in 2000, but fell to 1.1 million by 2003.
 - 18 Fish landings decreased from 23.5 million pounds in 1990 to 13.7 million pounds in 2000. They rose slightly to 14.6 million by 2003.
 - 19 Florida Natural Areas Inventory, Florida Resources and Environmental Analysis Center, Florida State University. Data. Data available from <http://www.fnai.org/data.cfm>; National Agricultural Statistics Service, U.S. Department of Agriculture. (2004). 2002 Census of Agriculture. *National Technical Information Service*. Retrieved February 20, 2006 from http://www.ntis.gov/products/census_agriculture.asp?loc=4-1-0.
 - 20 Broward County Office of Urban Planning and Redevelopment, Planning Services Division. (2004, March) "The Southeast Florida MSA." *Broward-by-the-Numbers* (20).
 - 21 Burchell, R., et al. (2005, November). *Sprawl costs: Economic impacts of unchecked development*. Washington, DC.: Island Press. This includes Okeechobee, Glades and Hendry counties, which are included in the Miami-Fort Lauderdale Economic Area analyzed in *Costs of sprawl—2000* and *Sprawl costs: Economic impacts of unchecked development*.
 - 22 Burchell, R., et al. (2002). *Costs of sprawl—2000. TCRP Report 74* Washington, D.C.: National Academy Press; Palm Beach and Broward counties are numbers three and five, respectively, on the sprawl index.
 - 23 In the Brookings study, South Florida includes Miami-Dade, Broward, and Palm Beach counties.
 - 24 The other 12 cities that were studied are Atlanta, Boston, Chicago, Dallas, Detroit, Denver, Houston, Los Angeles, New York, Philadelphia, San Francisco, and Washington, D.C.
 - 25 Lang, R. E. (2003, March). *Beyond edge city: Office sprawl in south Florida*. Washington, D.C.: The Brookings Institution Center on Urban and Metropolitan Policy.
 - 26 *Ibid.*; Gorden, P. & Richardson, H. (1994). "Congestion trends in metropolitan areas." In *Curbing gridlock: Peak period fees to relieve traffic congestion*. Washington: National Academy Press; Crane, R. (1996). Cars and drivers in the new suburb: Linking access to travel in neo-traditional planning. *Journal of the American Planning Association*, 62: 51-65.
 - 27 As of now, residents of Indian River County are hoping to avoid overdevelopment. A recent voter opinion survey identified the most important problem facing Indian River as "limiting growth and development (36%)." Seventy-six percent felt that Indian River is growing and developing too fast, and 68 percent were "very concerned" that Indian River would become as developed as Palm Beach with similar congestion and growth problems. Trust for Public Land. (2004, May 26). *Strong support for Florida county conservation bond*.
 - 28 Committee for a Sustainable Treasure Coast. (2005, September). *Committee for a sustainable treasure coast- Final report*. (04-61).
 - 29 National Agricultural Statistics Service, U.S. Department of Agriculture. (2004). 2002 Census of Agriculture. National Technical Information Service. Retrieved February 20, 2006 from http://www.ntis.gov/products/census_agriculture.asp?loc=4-1-0.
 - 30 Committee for a Sustainable Treasure Coast. (2005, February). *The challenge of growth: Interim report*. Fort Lauderdale, FL: The Center for Urban and Environmental Solutions, Florida Atlantic University; Chriszt, M. (2004). Hurricanes raise questions about Florida's outlook. *EconSouth*, 6.4; University of Florida Institute of Food and Agricultural Sciences. (2002, April). *Miami-Dade county agricultural land retention study: Summary and recommendations* (Vol. 1). The Miami-Dade County Agricultural Land Retention Study and the Committee for a Sustainable Treasure Coast are exploring ways to realize the retention of these invaluable lands.
 - 31 *Ibid.*
 - 32 Trust for Public Land. (2005). *LandVote Database*. Retrieved December 8, 2004. Data available from http://www.tpl.org/tier3_cdl.cfm?content_item_id=12010&folder_id=2386.
 - 33 National Association of Realtors. Quarterly median prices in the Port St. Lucie-Fort Pierce MSA are not reported by the National Association of Realtors; West Palm Beach-Boca Raton, Miami-Hialeah and Fort Lauderdale-Hollywood-Pompano Beach ranked 3, 5, and 9, respectively with median price increases of 36%, 32%, and 28% for existing single-family homes from first quarter 2004 to first quarter 2005.
 - 34 Bureau of Business and Economic Research. (2005) *Florida Statistical Abstract 2005*. Gainesville, FL: University of Florida; U.S. Census Bureau. (2005). *New residential construction* (2004). Retrieved September 15, 2005. Data available from <http://www.census.gov/const/www/newresconstindex.html>; No data is available for 2004 for Monroe County. The 12% change is from 1994 to 2003; In St. Lucie and Indian River counties, new residential permits increased 343% and 249%, respectively, from 1995 to 2004, compared to Miami-Dade at 102%, Palm Beach at 25%, Martin at 22% and Monroe at 12%. In Broward County, permits were down 45% from a high of 15,728 in 1994.
 - 35 Nelson, A. (2004, December). *Toward a new metropolis: The opportunity to rebuild America*. Washington, DC: Brookings Institution.

- 36 Florida Association of Realtors; Median prices were \$363,800 in Miami MSA, \$385,600 in Fort Lauderdale MSA, and \$391,600 in West Palm Beach MSA.
- 37 The market peaked four or five months ago. (2005, December 18). *Palm Beach Post*.
- 38 REALTOR Association of Greater Miami & the Beaches. (n.d.). Data available from <http://www.miamire.com/>.
- 39 Florida Housing Data Clearinghouse, University of Florida. (n.d.). *Regional and local profiles*. Florida Housing Data Clearinghouse: Improving housing decisions. Retrieved January 10, 2006 from <http://www.flhousingdata.shimberg.ufl.edu/>; The percentage of homeowners paying 30% or more of their income for housing is 28% in Broward, 27% in Miami, 25% in Palm Beach, 23% in Monroe, 21% in St. Lucie, 21% in Indian River, and 20% in Martin. Miami-Dade has 11% and Broward has 10% of homeowner households paying more than 50% of their income on housing.
- 40 National Association of Home Builders. *Housing Opportunity Index: 4th Quarter 2005*. Retrieved February 23, 2005 from <http://www.nahb.org>.
- 41 In 2005, police officers salaries were below that needed to purchase a home: Miami MSA (38% below), Fort Lauderdale MSA (33% below) and West Palm Beach-Boca Raton MSA (43% below); For elementary school teachers, the difference ranged from 31% to 42% in the region, compared to 16% to 25% in Florida's other major MSAs; Lipman, B. (2001, January). *Paycheck to paycheck: Working families and the cost of housing in America*. Washington, DC: Center for Housing Policy; Fiore, M. & Lipman, B. (2003, May). *Paycheck to paycheck: Wages and the cost of housing in America*. Washington, DC: National Housing Conference, Center for Housing Policy; (2005). Center for Housing Policy. *Paycheck to paycheck – 2005 findings*. Retrieved January 18. Data available from <http://www.centerforhousingpolicy.org/>
- 42 National Low Income Housing Coalition. (2005). *Up against a wall (11/04): Housing affordability for Renters: An analysis of the 2003 American Community Survey*. NLIHC Publications. Retrieved February 9, 2006 from <http://www.nlihc.org/pubs/index.htm#uaw>; Florida Housing Data Clearinghouse, University of Florida. (n.d.). *Regional and local Profiles*. Florida Housing Data Clearinghouse: Improving housing decisions. Retrieved January 10, 2006 from <http://www.flhousingdata.shimberg.ufl.edu/>. The percentage of renters who pay 30% or more of their income toward rent increased by 23% in Miami-Dade, Broward, and Martin counties, by 18% in Palm Beach County, by 39% in St. Lucie, and by 13% in Indian River from 1998 to 2003. Monroe County is the only county that had a decline (4%).
- 43 Leslie Warren, Special Programs Analyst, Florida Housing Finance Corporation. (personal communication, January 24, 2005).
- 44 Florida Impact. (2005). *Update 2005: A report on legislative action on issues of economic justice*. Tallahassee, FL: Harvest Printing & Copy Center, Inc.; Florida Housing Coalition. (n.d.). *Calls for a return to full funding for housing in FY06-07*. Retrieved February 8, 2006 from <http://www.flhousing.org/uploadedcontentfiles/talking%20points.pdf>.
- 45 Lomax, T., & Schrank, D. (2005). *The 2005 urban mobility report*. College Station, TX: Texas Transportation Institute, Texas A&M University; The annual delay per peak hour driver was 39 hours in 1993 and 11 hours in 1983.
- 46 Monica Zhong, Office of Policy Planning, Florida Department of Transportation. (personal communication, March 4, 2005); Florida Department of Transportation. (2005). *Public road mileage reports 1997-2003*. Retrieved from <http://www.dot.state.fl.us/planning/statistics/mileagereports/default.htm#public>.
- 47 Lomax, T., & Schrank, D. (2005). *The 2005 urban mobility report*. College Station, TX: Texas Transportation Institute, Texas A&M University.
- 48 The largest increases will be in Broward (112%), Palm Beach (140%), St. Lucie (117%), and Indian River (108%) counties.
- 49 Increases in Per Capita VMT: Monroe (36%), Miami-Dade (31%), Broward (29%), Martin (16%), St. Lucie (26%), and Indian River (26%); Monica Zhong, Office of Policy Planning, Florida Department of Transportation. (personal communication, March 4, 2005); Florida Department of Transportation. (2005). *Public road mileage reports 1997-2003*. Retrieved from <http://www.dot.state.fl.us/planning/statistics/mileagereports/default.htm#public>.
- 50 County Transit Departments; Bus ridership increased 60% in Broward and 178% in Palm Beach County from 1994 to 2004.
- 51 South Florida Regional Transportation Authority marketing department. Tri-rail ridership increased over 300% from 1989 to 1994. It declined from 1994 to 1999 but began another upward trend, increasing 29% from 1999 to 2004.
- 52 Gibson, W. E. (2005, November 19). A huge boost for south Florida. *Sun-Sentinel*; Shaw secures millions for South Florida in transportation needs. (2005, November 18). Retrieved December 20, 2005 from <http://shaw.house.gov/>.
- 53 South Florida Regional Transportation Authority. (n.d.) Retrieved from http://www.tri-rail.com/double_tracking/fact_sheet.htm. The Segment 5 Project is the final stage of this project. It consists of 45 miles, some of which is in the southern part of Broward County, with the remainder in the southern half of Palm Beach County. In addition, the SFRTA has initiated the Jupiter Corridor Alternatives Analysis to evaluate opportunities to provide transit in northern Palm Beach County.
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- 57 Chriszt, M. (2004). Hurricanes raise questions about Florida's outlook. *EconSouth*, 6.4.; Avery, D., et al. (2004). Southeast's economy on stable course. *EconSouth*, 6.4.; Insurance Information Institute. (n.d.). Presentations: Hurricane season of 2005: Impacts on US P/C Insurance Markets in 2006 & Beyond. Media. Retrieved February 1, 2006. Presentation available from <http://www.iii.org/media/presentations/katrina/>.
- 58 Finkl, C., et al. (2002, April 2002 Proposal). *Florida hurricane mitigation alliance*. Florida Atlantic University.
- 59 Lunsford, D., & Stabley, S. (2005, September 26). A major hurricane here could dwarf cost in New Orleans. *South Florida Business Journal*.
- 60 Editorial: Can we afford cost of storms? (2005, December 20). *TCPalm*. Retrieved December 22, 2005 from <http://www.tcpalm.com>.
- 61 Bureau of Beaches and Coastal Systems, Division of Water Resource Management, Florida Department of Environmental Protection. (2004, November 30). *2004 hurricane recovery plan for Florida's beach and dune system*; Individual Counties Coastal Management Departments.
- 62 Cato, J. (2005, September 29). *Hurricanes and tropical storms*:

- Higher frequency for the future.* Florida Sea Grant.
- 63 Two different calculations are given by the Shimberg Center for Affordable Housing, 113,620 and 116,593.
- 64 29,720 homes.
- 65 FEMA data and Affordable Housing Assistance data compiled by the Shimberg Center for Affordable Housing, December 2004. Comparable data is not currently available for rental units. Statewide, an additional 146,754 households, including owner and rental, received non-structural housing assistance and 663,893 applied but were not eligible for FEMA housing assistance.
- 66 Damaged structures included 31 in Martin County, 140 in St. Lucie, and 288 in Indian River; Bureau of Beaches and Coastal Systems. Florida Department of Environmental Protection. (2004, October). *Hurricane Frances & Hurricane Jeanne: Post-storm beach conditions and coastal impact Report*. Retrieved February 20, 2006 from http://bcs.dep.state.fl.us/reports/fran-jean/Hurricanes_Frances_&_Jeanne/Full_Report/Full_Report.pdf.
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Technical Endnotes

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- Page 19 (photo): Mickey & friend. From Nicole Zucco.
- Page 19 (photo): Key West. From VISIT FLORIDA.
- Page 19 (photo): Space shuttle. From Orlando/Orange County Convention & Visitors Bureau, Inc.
- Page 19 (photo): Tarpon Springs boating. From VISIT FLORIDA.
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CONCLUSION

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Acknowledgments

CUES wishes to recognize the contributions to this report by its partners at the South Florida Regional Planning Council, the Treasure Coast Regional Planning Council, the Collins Center for Public Policy, Inc., and the Metropolitan Center at Florida International University. These partners provided comments and encouragement on critical elements of the report.

Special thanks are extended to the key regional observers who participated in personal interviews, which will be published separately. Select interviews are excerpted in this document to provide guidance from experts on the future direction of the region as it faces a multitude of ongoing policy challenges over the next 25 years. While we were unable to include comments from all the stakeholders, all were useful in providing input for framing the discussion on the future of the region. We are hoping to publish separately the full array of comments from those experts in the near future. Those interviewed included Ken Ammon, Linda Brown, Michael Busha, Michael Cannon, Carolyn Dekle, Mason Jackson, Mike Jones, Niesen Kasdin, Michael Lannon, Daniella Levine, Ralph Marrinson, Dario Moreno, Bruce Nissen, Rod Petry, and Peter Spyke.

The project could not have been completed without the commitment and long hours of many members of CUES's staff. Dr. Lenore Alpert directed the overall project, managed the project team, and helped design, write, and review the report. Major components of the research, analysis, and writing were expertly completed by Lindsay Walker, with input from Dr. Alpert and Dr. Wallis. Lindsay Walker, Christina Bryk, and Matt Kurry all conducted data analyses. Other noteworthy contributions came from MaryBeth Burton and MJ Matthews, who both reviewed drafts of the report. Technical support was provided by Erin Sanders, Nicole Zucco, Phil Mancusi, Rachel Kalin, Angela Grooms, and Amanda Breeden. Expert graphic design was provided by John O'Brien of visplan.com, assisted by MaryBeth Burton, Erin Sanders, Rhonda Jones, and Lindsay Walker.

As always, our consultant, Dr. Allan Wallis, was an integral part of the project. He guided and directed the design of the project as well as assisted in writing and reviewing the drafts.

CUES Director James F. Murley provided the team with unfaltering support, encouragement, and vision for the project as a key part of CUES's regional initiatives.

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