

— SCENARIOS FOR THE FUTURE

Imagine four alternative futures by 2030. These four are defined by success or failure at achieving sustainability and prosperity for all its citizens. 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.

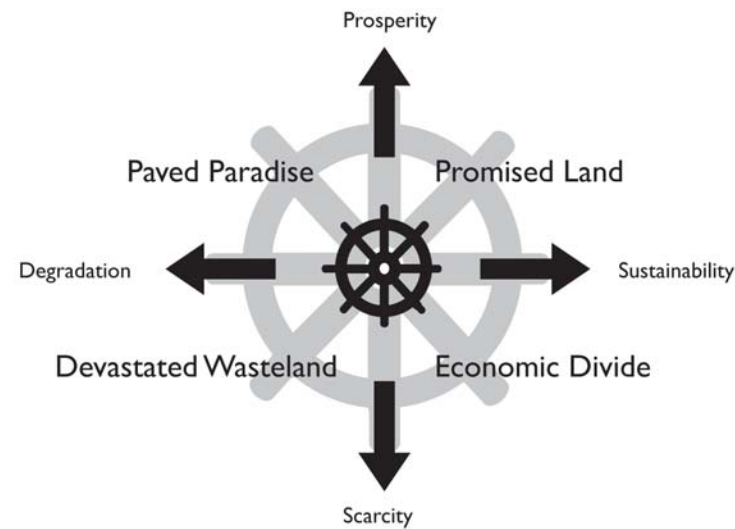
Promised Land. The future would be one in which both goals are achieved. By 2030, South Florida would be a region in which Everglades habitats and the underlying water supply were significantly restored, social disparities were reduced because the economy generated more high-paying jobs, and congestion was reduced 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 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.

These scenarios help South Florida recognize the need for a regional vision. They will also aid the region in moving toward that vision and measuring its progress. The trends and projections represent markers on the map to guide the visioning process. The region is at a critical crossroads in charting its direction and will be making important choices as it moves toward 2030.



For more information on *Charting the Course: Where is South Florida Heading?*, visit www.soflo.org. This publication was made possible due to a grant from the John D. and Catherine T. MacArthur Foundation.



Charting the Course

Where is South Florida Heading?

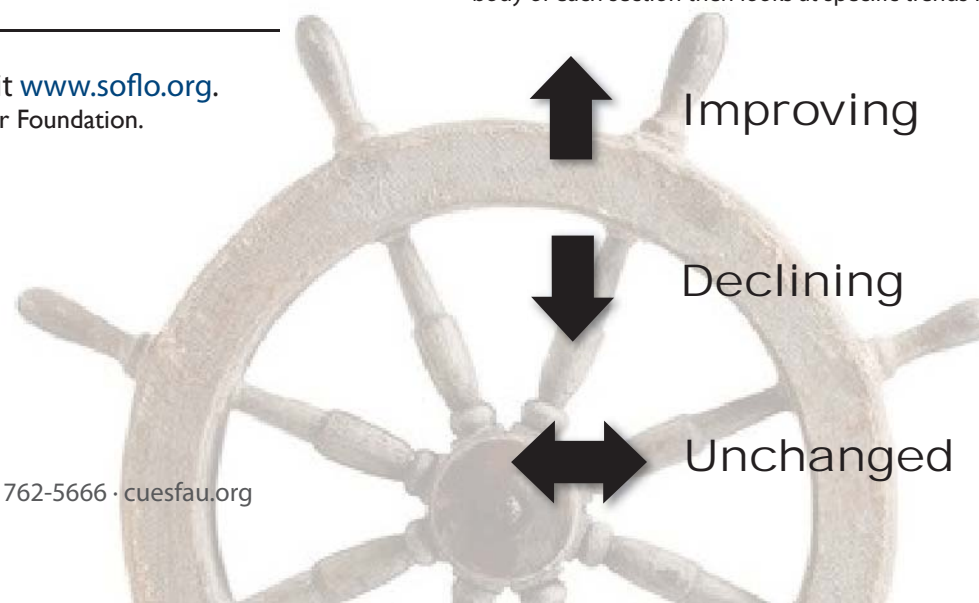
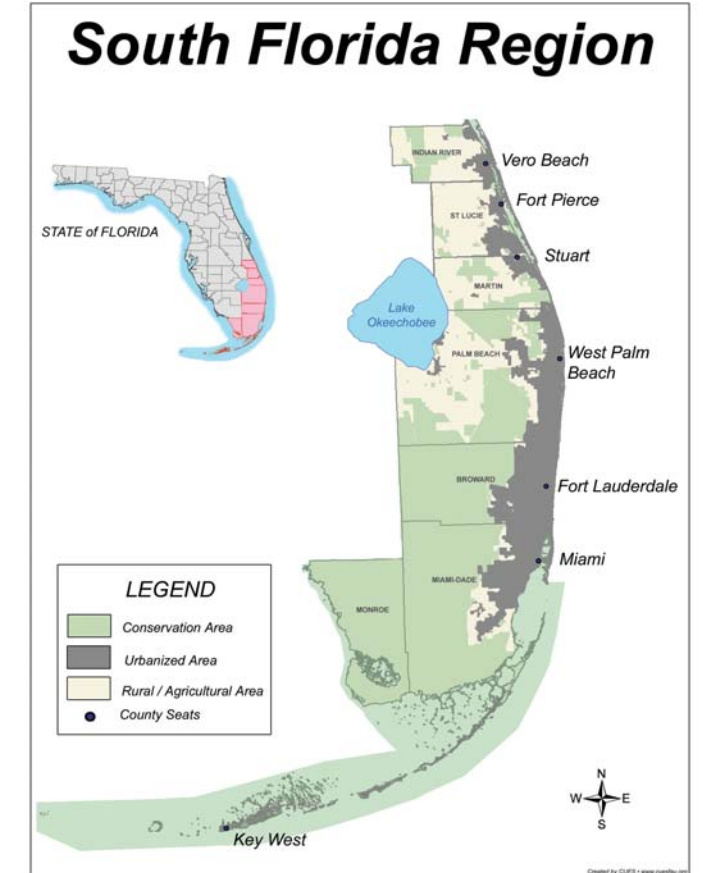
Charting the Course: Where is South Florida Heading? reports the dynamic changes that South Florida is experiencing. It uses projections and expert commentary to image its future in 2030, focusing on the emergence of the regional geography as critical for addressing important issues. There are two overriding challenges that South Florida must be able to meet. 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. The direction and changes that are propelling the region are key to understanding the future.

In 25 years or less, Florida will surpass New York, becoming the third most populous state in the nation. The South Florida region, which will remain the most populous region of the state, includes Indian River, St. Lucie, Martin, Palm Beach, Broward, Miami-Dade, and Monroe counties.

Since 2000, South Florida has added 400,000 people. It anticipates another 2.5 million, reaching 8.4 million by 2030. Considering such dramatic growth and its impact on housing, transportation, the environment, and the economy, this report updates and projects these trends to 2030. By focusing on sustainability and prosperity, it examines the impact of rapid population growth on the region's people, environment, and economy and more importantly, it also raises issues for informed discussion about whether projected trends will lead to future sustainability and prosperity in the region.

As in the earlier reports, arrows indicate performance trends for key indicators in each of the three sections: People, Place, and Prosperity. The body of each section then looks at specific trends for the future. A "Spotlight on the Hurricanes" in Place and Prosperity highlights the impact of the 2004 and 2005 hurricane seasons on South Florida. Trend information is followed by a comparison of South Florida with other urban regions in the state. Interviews with experts from across the region help provide insights into the future needs and potential choices for South Florida. Scenarios are developed in the Conclusion to illustrate these "windows into the future," which can be used to frame the regional outlook in 2030.

Charting the Course: Where is South Florida Heading? (2006) is published by the Center for Urban and Environmental Solutions (CUES) at Florida Atlantic University (FAU) as the third in a series of regional indicators reports. *Imaging the Region: South Florida via Indicators and Public Opinions* (2001) focused on raising awareness. *Regional Shift: South Florida in Transition* (2004) identified a baseline of 2000 Census indicators and focused on major transformative changes underway in South Florida.



PEOPLE



"We are at a turning point. We could move toward increased Balkanization in terms of class division, 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."

Daniella Levine, Executive Director/Founder
Human Services Coalition of Miami-Dade County

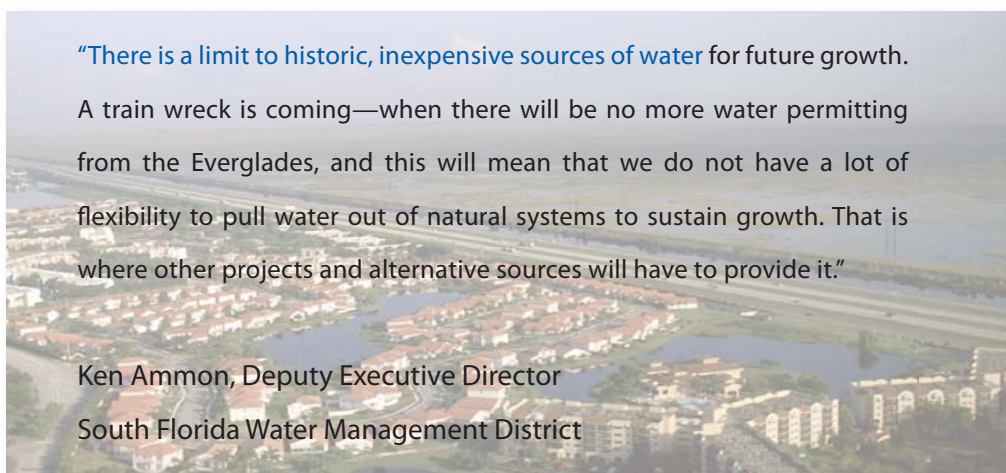


PLACE



"There is a limit to historic, inexpensive sources of water for future growth. A train wreck is coming—when there will be no more water permitting from the Everglades, and this will mean that we do not have a lot of flexibility to pull water out of natural systems to sustain growth. That is where other projects and alternative sources will have to provide it."

Ken Ammon, Deputy Executive Director
South Florida Water Management District

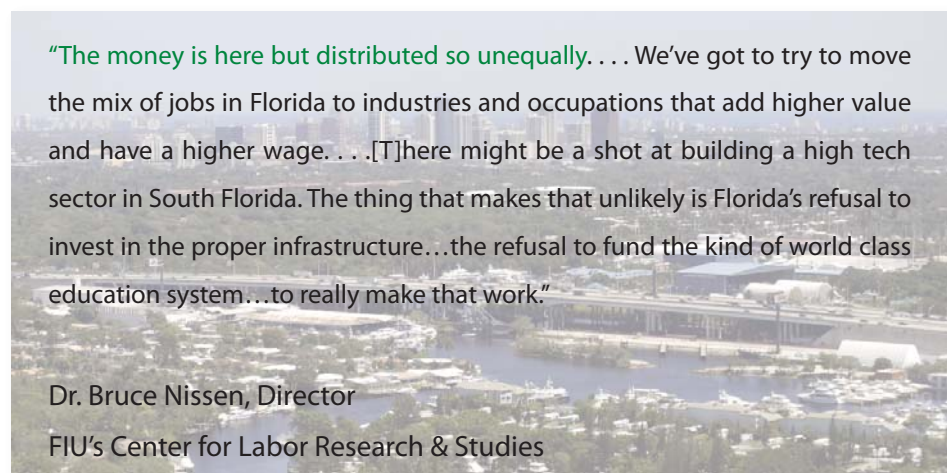


PROSPERITY



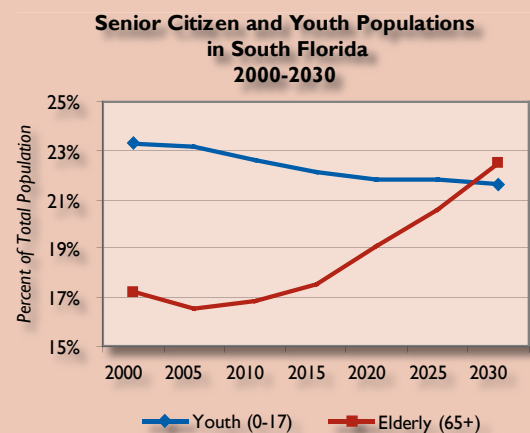
"The money is here but distributed so unequally. . . . We've got to try to move the mix of jobs in Florida to industries and occupations that add higher value and have a higher wage. . . . [T]here might be a shot at building a high tech sector in South Florida. The thing that makes that unlikely is Florida's refusal to invest in the proper infrastructure. . . . the refusal to fund the kind of world class education system. . . . to really make that work."

Dr. Bruce Nissen, Director
FIU's Center for Labor Research & Studies

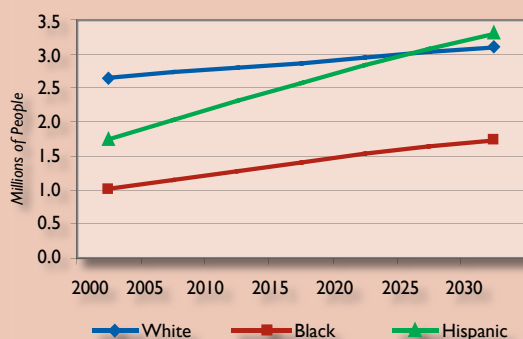


Quick Facts

- In 2004, the region's population reached 5.9 million and is projected to reach 8.4 million by 2030. International immigration continues to be the most significant driver of population growth.
- The region's Hispanic population accounted for a third of the population in 2003, projected to increase 39% by 2030, surpassing non-Hispanics in absolute numbers in South Florida.
- In 2003, the senior population was 2.9 million, expected to increase to 6.3 million (23% of population) by 2030, while the youth population will increase from 3.9 million to 5.3 million (22% of population).



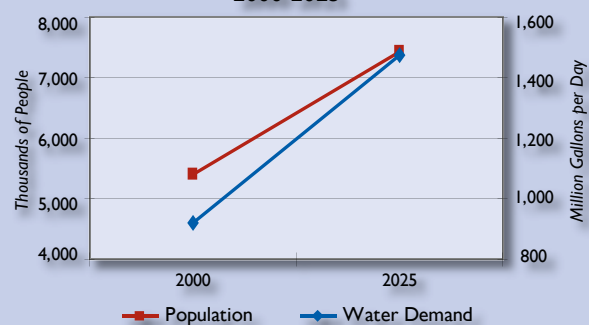
South Florida's Population Projections by Race and Ethnicity 2000-2030



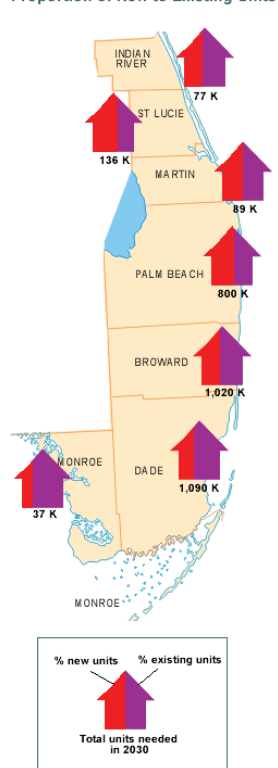
Quick Facts

- Public water supply withdrawals are expected to increase 60 percent by 2025. Alternative sources, such as reclaimed water and desalinated water, will be necessary to meet increasing demand, yet the three largest counties in the region have the lowest per capita water reuse.
- As part of Everglades restoration, Florida's Acceler8 program will provide additional money to complete eight critical projects a decade ahead of schedule.
- In the next 25 years, nearly half of homes needed (1.5 million units) still need to be built.
- In July 2005, the region's median price for existing single family homes reached almost \$400,000, becoming further out of reach for workers in traditional occupations.

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



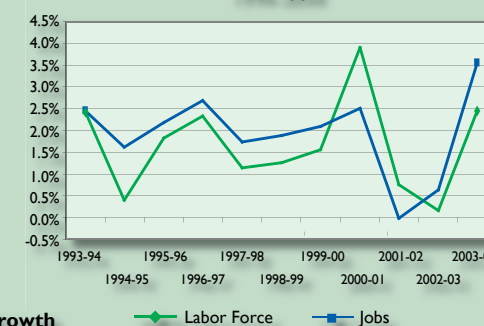
Residential Unit Demand Units Needed in 2030 with Proportion of New to Existing Units



Quick Facts

- Employment growth (21%) in the region was greater than labor force growth (17%) from 1994 to 2004, resulting in declining unemployment rates.
- In 2004, Miami-Dade County was on par with the state with about a quarter of its population holding a bachelor's degree. Broward and Palm Beach counties surpassed both the state and the nation.
- Half of the region's households had incomes of less than \$35,000 in 2003, while the housing wage was above that level. From 2000 to 2003, wages increased to 3.3%, while the housing wage increased to 6.6%, demonstrating the community housing gap.
- The development of Scripps in Palm Beach County and other research institutes throughout the region show promise for future prosperity and economic competitiveness in biotechnology.

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



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

