



Economics Research Associates

Final Project Report

**South Florida East Coast Corridor Transit Analysis
Existing Demographic Conditions**

Prepared for

Gannett Fleming, Inc.

On Behalf of

State of Florida Department of Transportation

Submitted by

Economics Research Associates

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General & Limiting Conditions

Every reasonable effort has been made to ensure that the data contained in this study reflect the most accurate and timely information possible. These data are believed to be reliable. This study is based on estimates, assumptions and other information developed by Economics Research Associates from its independent research effort, general knowledge of the market and the industry, and consultations with the client and its representatives. No responsibility is assumed for inaccuracies in reporting by the client, its agent and representatives or any other data source used in preparing or presenting this study.

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This study is qualified in its entirety by, and should be considered in light of, these limitations, conditions and considerations.

I. Introduction

Economics Research Associates (ERA) is part of the consultant team selected by the Florida Department of Transportation to study the viability of providing passenger transit service within the South Florida East Coast Corridor (SFECC) from the vicinity of Downtown Miami in Miami-Dade County to the town of Jupiter in Palm Beach County. For the Regional Transit Alternatives (Tier 1) Analysis portion of the study, ERA's overall objective is to identify opportunities for potential land value capture/enhancement along the Corridor that could provide potential sources of funding for the initial set of transit initiatives.

The following sections describe ERA's initial findings in regard to demographic characteristics affecting Corridor development. The report is divided into five general sections: 1) Introduction; 2) Study Corridor Overview; 3) Approach and Methodology; 4) Key Findings; and 5) an Appendix containing supporting tables and maps.

Note that the information presented below is meant to be a point of departure for a more refined analysis that will follow the selection of proposed SFECC Station Areas. Once Station Areas are selected, ERA will coordinate with the consultant team on the following:

- Define prototypical Corridor segments based on proposed level of transit service, preliminary understanding of potential development opportunity, as well as other criteria (up to four segment types will be selected for land use and real estate analysis);
- Analyze real estate market trends, development patterns, economic development initiatives, Capital Improvement Plans (CIP), and land use policies as they relate to opportunities and constraints for future development in each of the Corridor segments;
- Complete interviews with selected representatives of CRA designation areas regarding development area boundaries and planning objectives fostered by CRA programs;
- Identify preliminary market demand for relevant land use typologies so as to inform conceptual development programs by Corridor segment;
- Based on the conceptual development program, identify railway cost-sharing options and quantify incremental values that various development scenarios might generate, and then incorporate these findings into the project financial plan.

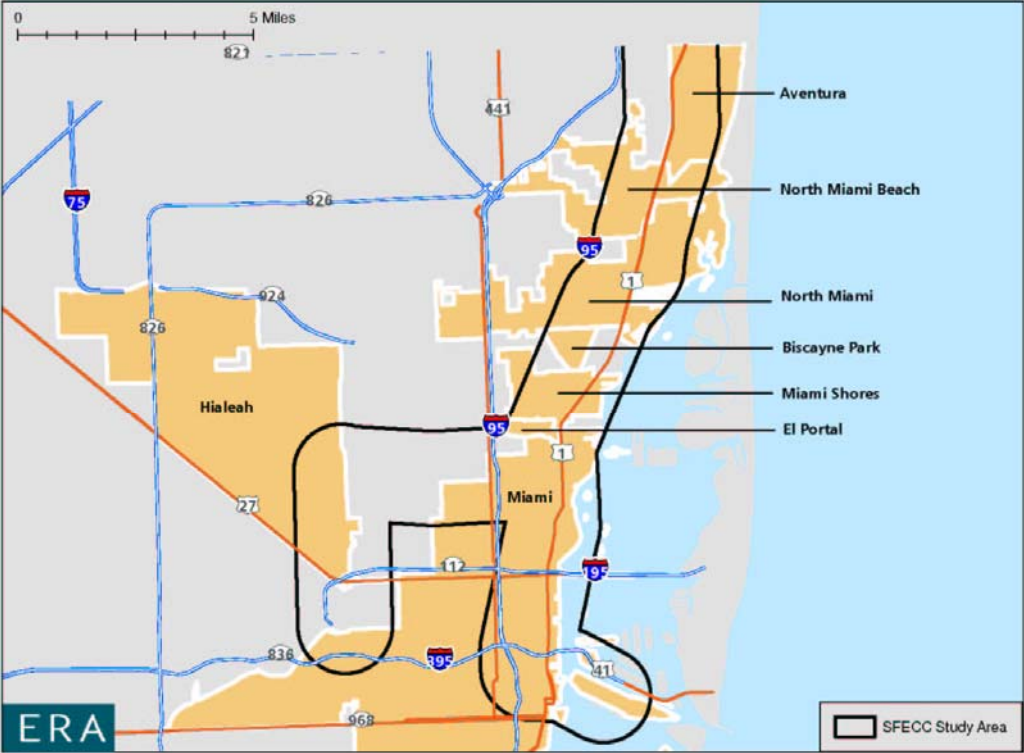
II. Study Corridor Overview

The study corridor is centered on the Florida East Coast Railroad (FECR) right-of-way that generally parallels Dixie Highway and US-1. It extends 83 miles in length, running from approximately West Flagler Street in Downtown Miami to Indiantown Road in Jupiter. The corridor width includes the area that is approximately one mile in either direction of the FECR right-of-way. The corridor traverses three counties and 28 municipalities, as listed below in Table 1, and depicted graphically in Figures 1-3. Note that the maps presented below include municipalities in the three study corridor counties outside the project Scope of Work, and are shown for reference purposes only.

Table 1: SFECC Counties & Municipalities

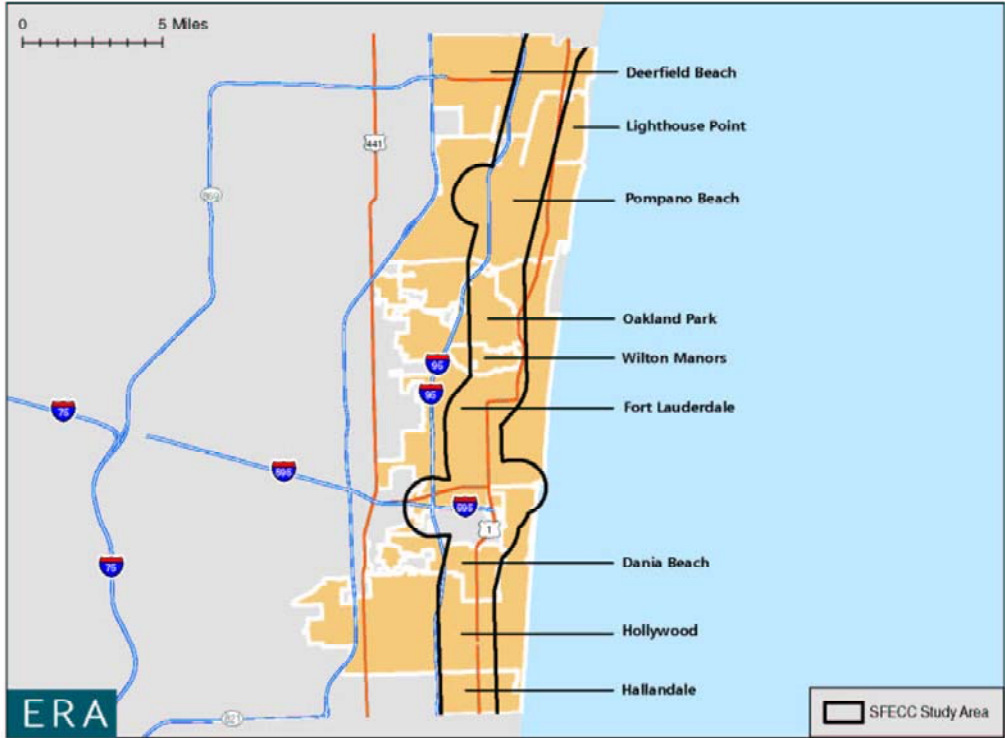
<u>Miami-Dade County</u>	<u>Broward County</u>	<u>Palm Beach County</u>
Miami	Hallandale Beach	Boca Raton
El Portal	Hollywood	Delray Beach
Miami Shores	Dania Beach	Boynton Beach
Biscayne Park	Fort Lauderdale	Lantana
North Miami	Wilton Manors	Lake Worth
North Miami Beach	Oakland Park	West Palm Beach
Aventura	Pompano Beach	Mangonia Park
	Lighthouse Point	Riviera Beach
	Deerfield Beach	Lake Park
		North Palm Beach
		Palm Beach Gardens
		Jupiter

Figure 1: Map of Miami-Dade County Municipalities



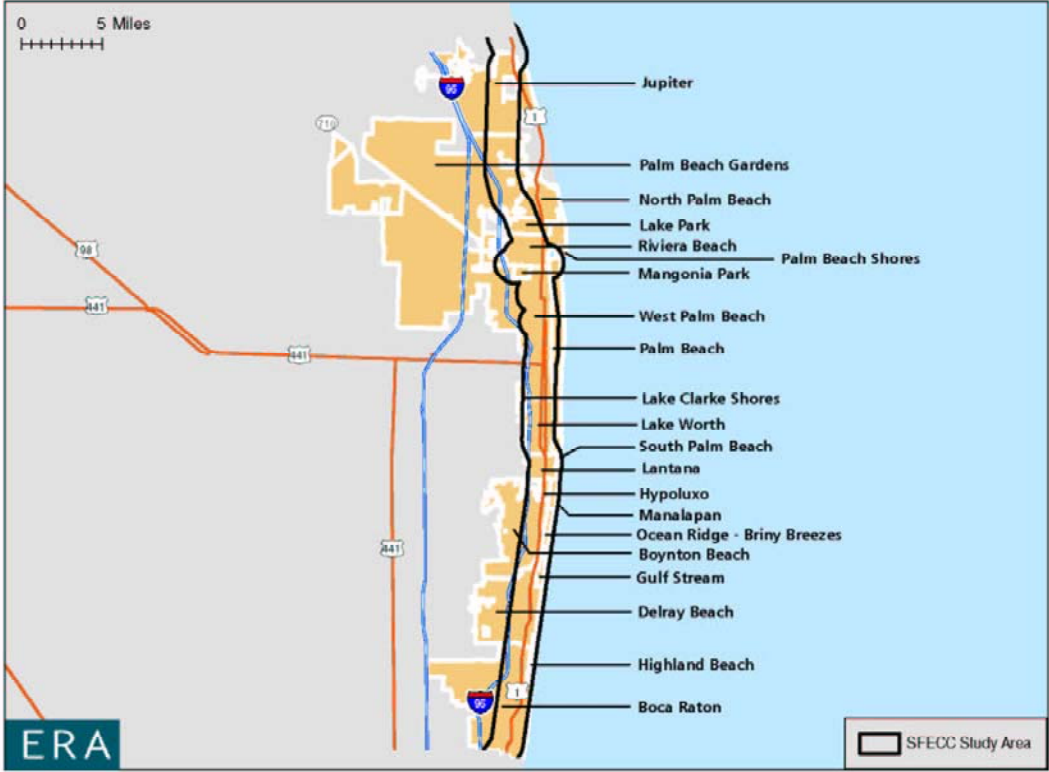
Source: ESRI Business Analyst

Figure 2: Map of Broward County Municipalities



Source: ESRI Business Analyst; Broward County MPO

Figure 3: Map of Palm Beach County Municipalities



Source: ESRI Business Analyst

III. Approach & Methodology

The purpose of this undertaking was to develop an analytical framework for future analyses of the 28 study corridor municipalities. This analysis considers each municipality relative to the three-county study corridor in terms of market size, level of density, and projected growth patterns. ERA analyzed these characteristics for four market types that are generally related to specific land uses, including resident households, the industrial employment sector, the commercial employment sector, and the service employment sector.

The first three markets represent demand drivers for specific land uses. An example would be commercial employment growth generating demand for more office space. Meanwhile, the service employment market represents the byproduct of demand from the other three markets for goods and services. For example, household growth drives increases in total consumer spending, which creates additional demand for retail establishments that in turn need to be staffed by new sales clerks.

For the analyses presented below, ERA analyzed Traffic Analysis Zone (TAZ) data published by the study corridor Metropolitan Planning Organizations (MPO) for the years 2000 (base year) and 2030 (projected year). These data were used to compile a series of maps using Geographic Information Systems (GIS) that demonstrate household and employment densities within and around the study area corridor.¹ The data were also used to segment the study corridor municipalities by size and density characteristics for the four market types described above. This is a useful exercise to help focus real estate market research because it provides a tool to better understand land value differentials across similar marketplaces in the three study corridor counties. The methodology employed for the segmentation exercise is detailed below.

Segmentation Methodology

The segmentation analysis is based on a relative comparison of the 28 municipalities to the entire 83-mile study corridor. In other words, if a place is characterized as high-density, it is considered high-density relative to the other places in the corridor. The municipalities are divided into even quartiles for three market variables: 1) market size; 2) density; and 3) projected growth. It should also be noted that the analysis only considers the portion of each municipality that is located within the boundaries of the study corridor, and therefore the data do not necessarily reflect market conditions for the entire municipality. The benchmarks for the three market variables include the following:

¹ For TAZs that are only partially within the study corridor, the share of total physical area within the study corridor was used as an estimate for the share of households and employment located within the corridor boundaries. While this methodology is imperfect, we believe that this approach provides a reasonably accurate depiction of corridor market conditions.

Market Size

Market size is based on the absolute number of households or sector-specific employment that is concentrated in a particular municipality within the confines of the study corridor boundaries. This variable differentiates major cities (Miami, Ft. Lauderdale, etc.) from smaller towns (Lantana, Lighthouse Point, etc.), with varying degrees of market size in between. Given that the data reflect base year (2000) market conditions, the analysis excludes any growth that has occurred over the past six years. This limitation is addressed by the growth variable. The quartile breaks for market size are shown below in Table 2.

Table 2: Market Size Quartiles

Quartile	MARKET SIZE, as of 2000			
	Households	Industrial Employment	Commercial Employment	Service Employment
Minimum	0 (Uninc. Broward)	2 (Biscayne)	55 (Biscayne)	66 (Biscayne)
Quartile 1	3,839	505	1,254	2,019
Quartile 2	8,704	1,274	3,172	5,429
Quartile 3	14,071	3,447	7,135	8,968
Quartile 4 (Max)	36,408 (Miami)	10,499 (Pompano Beach)	19,173 (Ft. Lauderdale)	123,964 (Miami)

Source: County Metropolitan Planning Organizations; Economics Research Associates, June 2006

Density

The density measure is based on the number of households or sector-specific employment per square mile of land area in a particular municipality within the confines of the study corridor boundaries. From a real perspective, high density typically translates into high land value, and as such this variable is meant to capture a representation of high-density development concentrations in the study corridor. The density variable tends to over-emphasize the significance of municipalities that have less land area within the confines of the study area, and under-emphasize the significance of concentrated pockets of very high density in the core downtown areas of larger cities. The quartile breaks for density are shown below in Table 3.

Table 3: Density Quartiles

Quartile	DENSITY (# per Square Mile), as of 2000			
	Households	Industrial Employment	Commercial Employment	Service Employment
Minimum	0 / sq. mi. (Uninc. Broward)	3 / sq. mi. (Biscayne)	81 / sq. mi. (Uninc. Broward)	106 / sq. mi. (Biscayne)
Quartile 1	1,475 / sq. mi.	162 / sq. mi.	413 / sq. mi.	894 / sq. mi.
Quartile 2	1,855 / sq. mi.	290 / sq. mi.	731 / sq. mi.	1,119 / sq. mi.
Quartile 3	2,607 / sq. mi.	525 / sq. mi.	1,100 / sq. mi.	1,536 / sq. mi.
Quartile 4 (Max)	4,415 / sq. mi. (Aventura)	2,471 / sq. mi. (Mangonia Park)	5,387 / sq. mi. (Aventura)	8,847 / sq. mi. (Miami)

Source: County Metropolitan Planning Organizations; Economics Research Associates, June 2006

Projected Growth Rate

Growth rate projections capture the expected change in household and sector-specific employment counts between 2000 and 2030. This measure is meant to identify municipalities with rapidly evolving marketplaces where there could be opportunity to increase current density levels and capture significant upside in terms of land value. The growth rate quartiles are shown below in Table 4.

Table 4: Projected Growth Rate Quartiles

COMPOUND ANNUAL GROWTH RATE, 2000 to 2030				
Quartile	Households	Industrial Employment	Commercial Employment	Service Employment
Minimum	-0.10% (El Portal)	-0.34% (El Portal)	0.14% (N. Palm Beach)	0.33% (Oakland Park)
Quartile 1	0.53%	-0.15%	0.68%	0.76%
Quartile 2	0.94%	0.15%	1.21%	0.88%
Quartile 3	1.50%	0.43%	1.76%	1.63%
Quartile 4 (Max)	2.86% (Jupiter)	1.56% (Dania Beach)	3.98% (Lake Park)	3.50% (Mangonia Park)

Source: County Metropolitan Planning Organizations; Economics Research Associates, June 2006

IV. Key Findings

Household Density Patterns

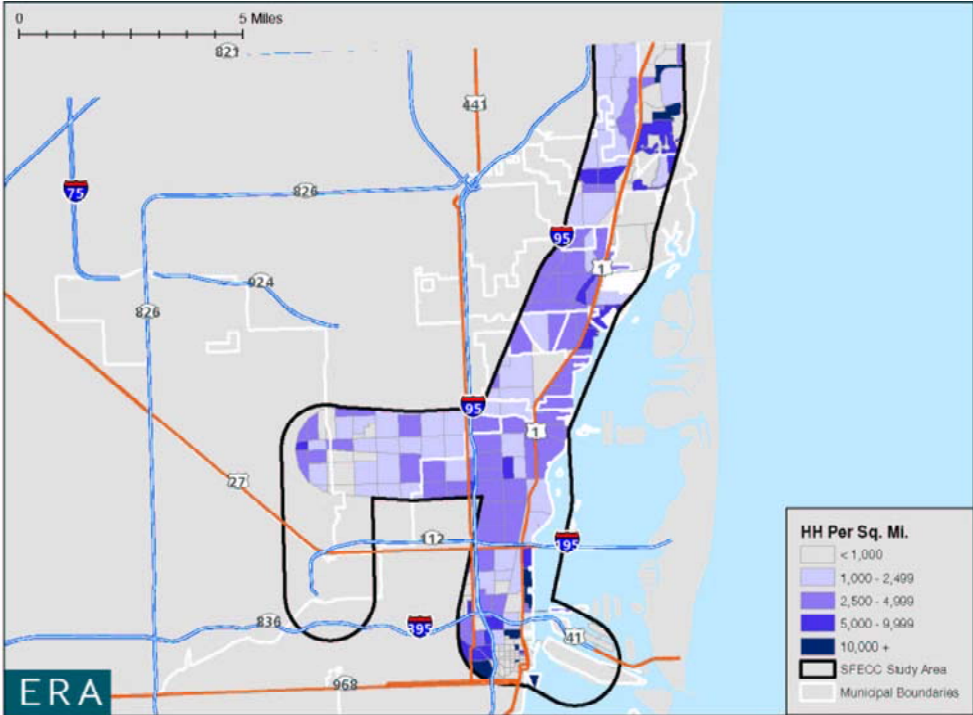
Base Year (2000)

As shown in Figure 4 through Figure 9, base year (2000) data indicates that the study corridor becomes less dense north from Downtown Miami, to Indiantown Road in Jupiter. In Miami-Dade County most of the high-density household concentrations are located in or near the downtown area. Moving northward through the county, pockets of higher-density household concentrations alternate between locations to the east and west of US-1 / Dixie Highway. Also of note is the area surrounding the Aventura Mall in the northernmost portion of the county, where there are small concentrations of households that rival Downtown Miami in terms of density.

Most of the higher-density household concentrations in Broward County are located in Hollywood, immediately to west of US-1. The areas of Wilton Manors and the north part of Fort Lauderdale within the study corridor also represent dense clusters of households, followed by sporadically dense areas northward through Pompano Beach and Deerfield Beach.

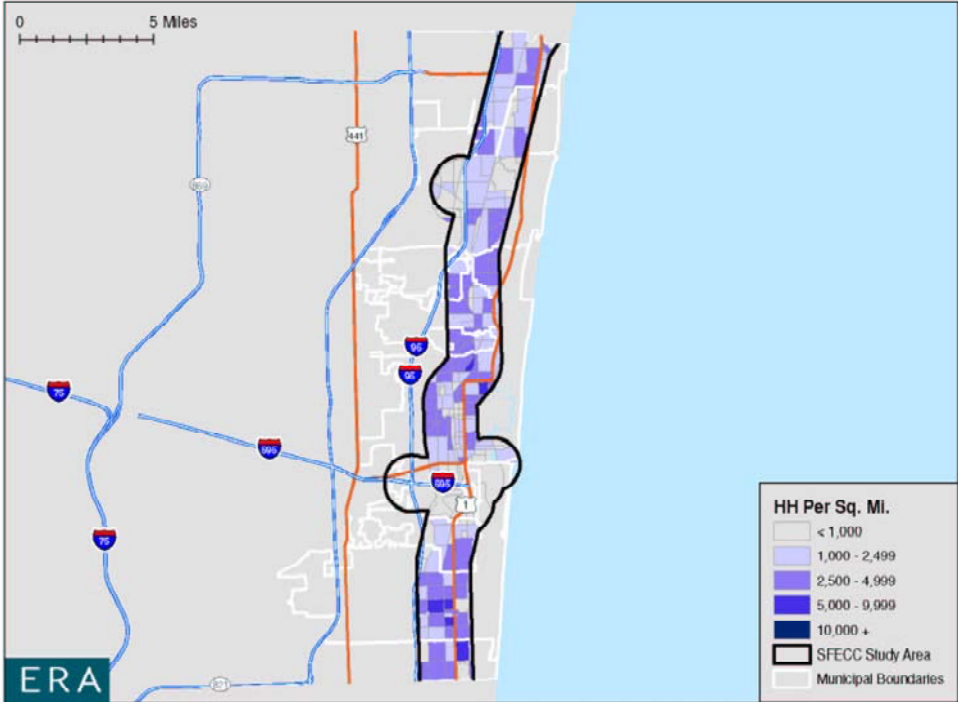
While it is physically the largest of the three counties comprising the study corridor, Palm Beach County is also the least dense in terms of households per square mile. As of 2000, Boca Raton was the densest municipality in Palm Beach County. However, relative to Miami-Dade County, and even some places in Broward County, Boca Raton can only be characterized as moderately dense. The southern part of Delray Beach can also be considered relatively dense by Palm Beach County standards, as can the area immediately north of Downtown West Palm Beach. Low levels of household density define the remainder of the study corridor, as the SFECC passes through communities such as Palm Beach Gardens and Jupiter.

Figure 4: Map of Household Density by TAZ in Miami-Dade County, 2000



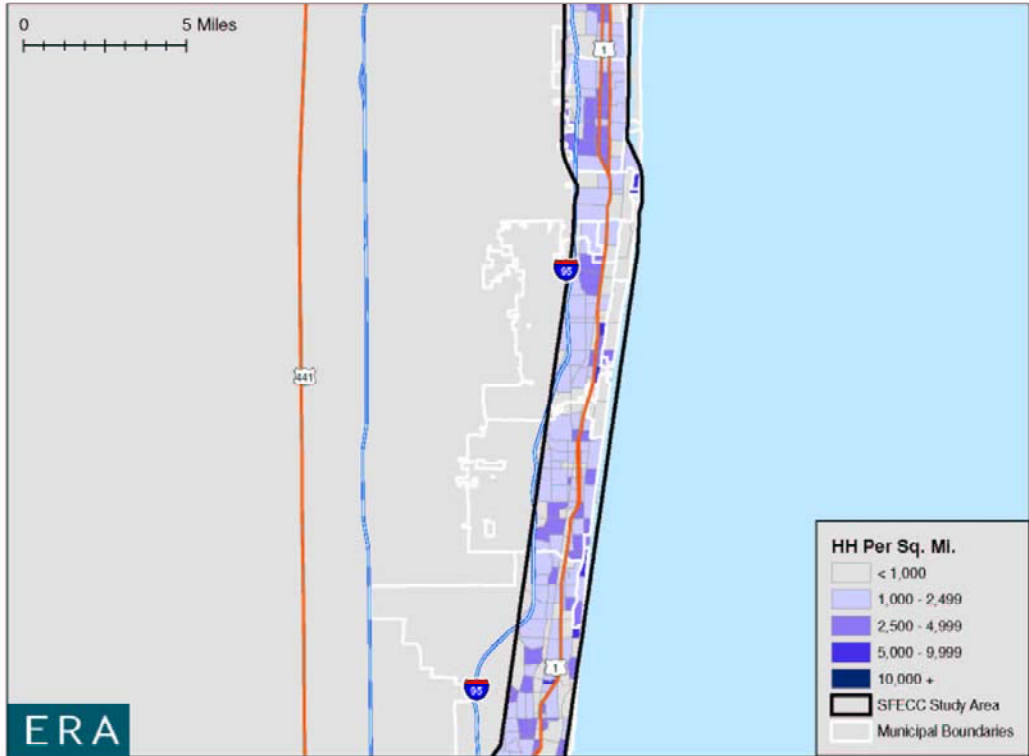
Source: Miami-Dade County MPO; Gannett Fleming; ERA

Figure 5: Map of Household Density by TAZ in Broward County, 2000



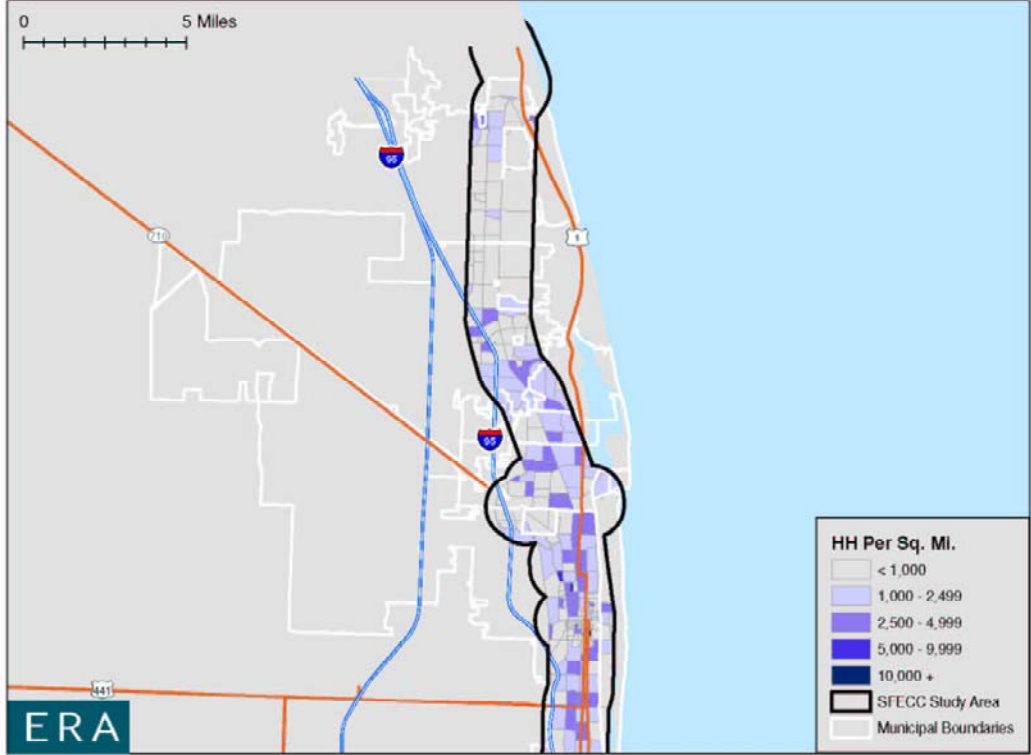
Source: Broward County MPO; Gannett Fleming; ERA

Figure 6: Map of Household Density by TAZ in Southern Palm Beach County, 2000



Source: Palm Beach County MPO; Gannett Fleming; ERA

Figure 7: Map of Household Density by TAZ in Northern Palm Beach County, 2000



Source: Palm Beach County MPO; Gannett Fleming; ERA

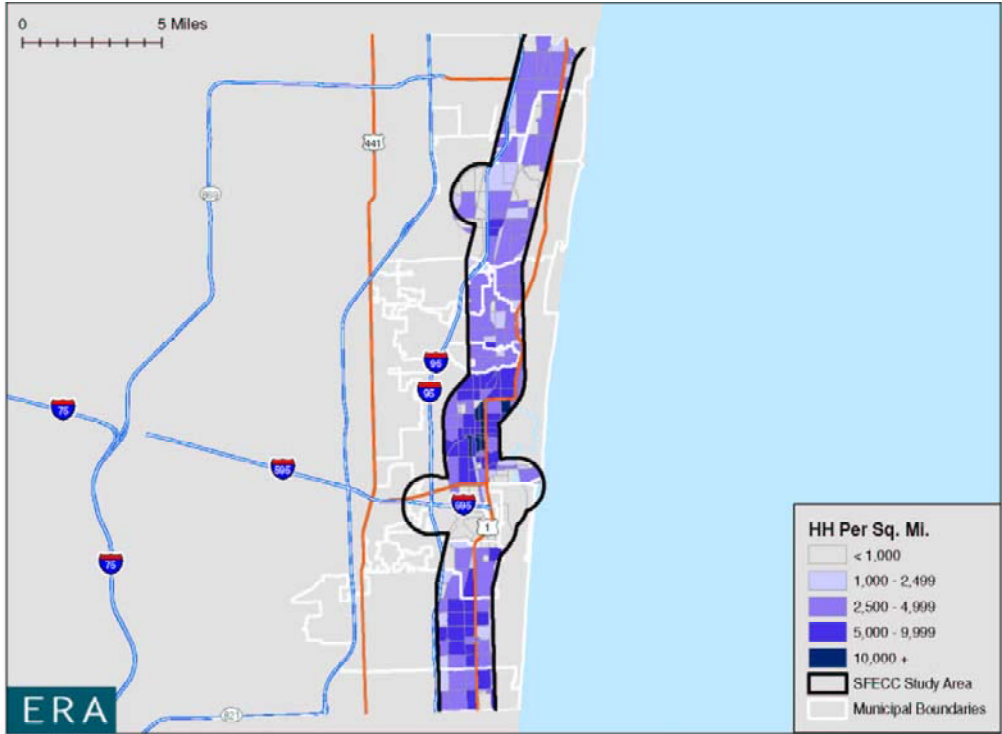
Projected Year (2030)

Projected year data more accurately reflect the housing boom of the early 20th century that has changed the landscape of coastal Southeast Florida. Figure 8 shows that between 2000 and 2030, most of Downtown Miami is projected to experience a substantial increase in household density. Areas in North Miami are also expected to add experience significant increases in household density.

Figure 9 below shows the projected household density in Broward County for 2030. When compared with Figure 5, it is apparent that most communities within the study corridor are expected to add household density through 2030. Significant increases are projected in Delray Beach and Fort Lauderdale, particularly downtown Fort Lauderdale. Most of Oakland Park, Pompano Beach, and Deerfield Beach are also expected to add household density through 2030.

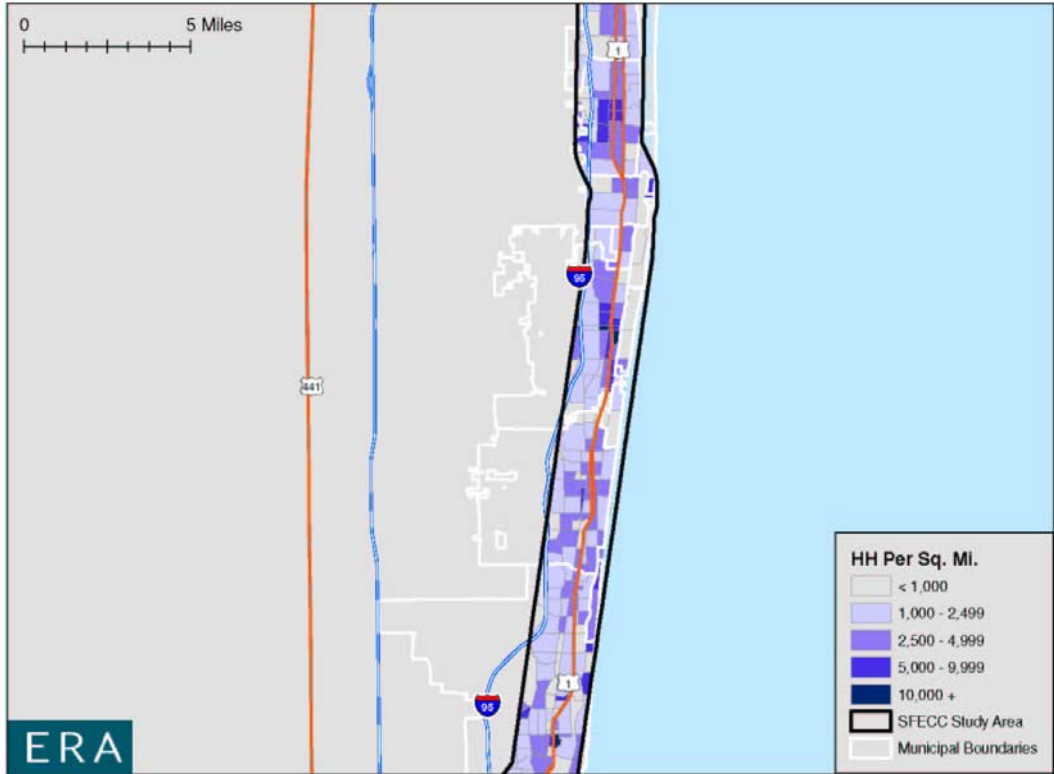
Figure 10 and Figure 11 depict moderate increases in household density that are expected to occur between 2000 and 2030 at various points in the Palm Beach, particularly in the area from Boca Raton to West Palm Beach. Moderate changes are predicted for both the southern and northern edges of Boca Raton, as well as the central sections of Delray Beach, Boynton Beach, and Lantana. West Palm Beach is expected to experience the most significant increase in household density, particularly in the downtown area. Meanwhile, Riviera Beach, Palm Beach Gardens, and Jupiter are projected to experience moderate density increases in select locations, most of which are located in the western half of the study corridor.

Figure 9: Map of Household Density by TAZ in Broward County, 2030



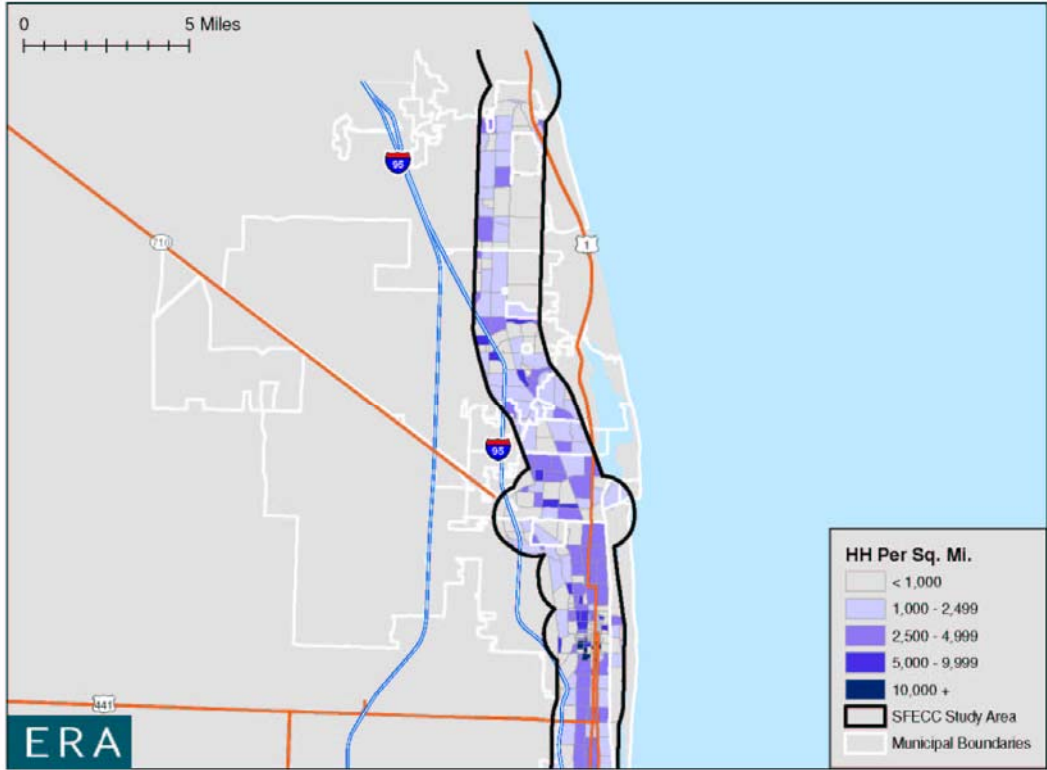
Source: Broward County MPO; Gannett Fleming; ERA

Figure 10: Map of Household Density by TAZ in Southern Palm Beach County, 2030



Source: Palm Beach County MPO; Gannett Fleming; ERA

Figure 11: Map of Household Density by TAZ in Northern Palm Beach County, 2030



Source: Palm Beach County MPO; Gannett Fleming; ERA

Segmentation & Implications

The matrix presented below segments the 28 study corridor municipalities into groups of household clusters that share relatively similar market sizes and density characteristics. The matrix reads from bottom to top, and left to right, with the lower left-hand corner representing the smallest markets with the lowest levels of density, and the upper right-hand corner representing the largest markets with the highest densities. Municipalities that are projected to experience the highest rate of household growth (upper quartile) between 2000 and 2030 are identified by bolded and underlined text.

Large, high-density market areas that are projected to experience a rapid rate of new household formation represent significant opportunity for near term value capture from the development of new housing and ancillary retail, particularly in downtown locations in cities such as Miami and Fort Lauderdale. However, all of the municipalities have the potential to capture a share of incremental value through local policy decisions and economic development initiatives that focus local growth on high-density development projects.

Table 5: Household Segmentation of Study Corridor Municipalities

		HOUSEHOLD DENSITY			
		<i>Low</i>	<i>Low-to-Mod</i>	<i>Mod-to-High</i>	<i>High</i>
SIZE OF HOUSEHOLD CONCENTRATION	<i>Large</i>		Pompano Beach Boca Raton West Palm Beach	Miami Hollywood Fort Lauderdale	
	<i>Mid-to-Large</i>		Delray Beach Boynton Beach	Deerfield Beach Lake Worth	North Miami Aventura Oakland Park
	<i>Small-to-Mid</i>	Riviera Beach Palm Beach Gardens Jupiter	Dania Beach	Miami Shores	North Miami Beach Hallandale Beach Wilton Manors
	<i>Small</i>	Lantana Mangonia Park Lake Park	El Portal North Palm Beach	Biscayne Park	Lighthouse Point

Note: Municipalities in bold & underlined projected to experience a rate of annual growth in the upper quartile relative to the study corridor.

Source: Economics Research Associates, June 2006

Employment Density Patterns

Base Year (2000)

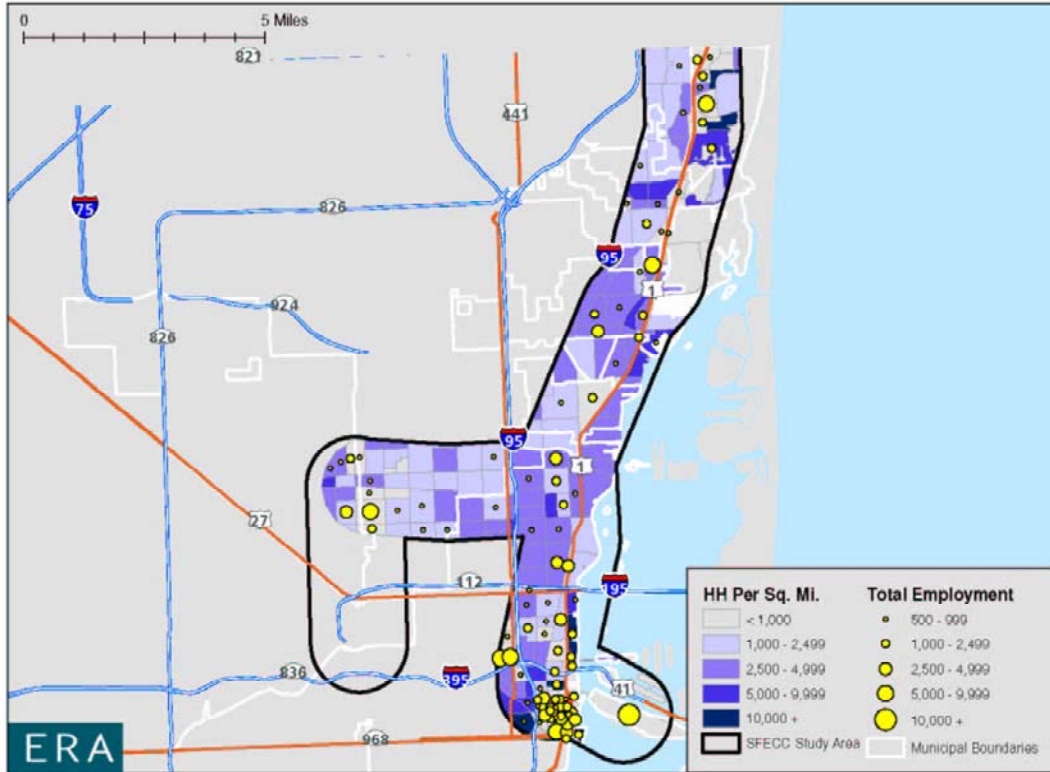
Figure 12 below shows 2000 total employment in Miami-Dade County for all TAZs containing more than 500 employees. Downtown Miami, south of I-395, is the county's primary employment center. The City of Miami is also home to secondary employment clusters that are concentrated along I-395 just west of I-95, and near US-1 just north of I-195. Other areas with significant employment activity in the Miami-Dade portion of the study corridor include the area along US-1 in North Miami, as well as the area near the Aventura Mall in the northernmost part of the county.

Base year employment clusters in Broward County are depicted graphically in Figure 13. The map shows that employment is more dispersed in Broward County than it is in Miami-Dade, with the only exception being Downtown Fort Lauderdale, the county's main employment center. Pompano Beach contains the second densest concentration of employment in the county after Fort Lauderdale. Notable ancillary employment clusters are also found in Hallandale Beach, Delray Beach, and Boynton Beach, respectively.

As shown in

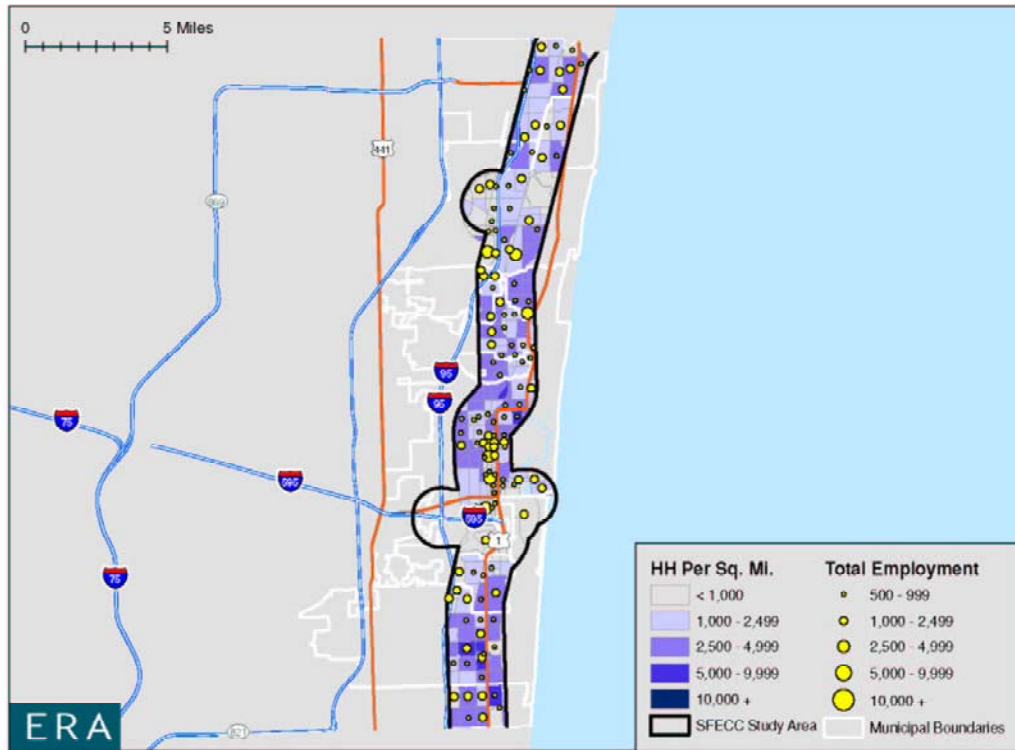
Figure 14 and Figure 15, the two main employment centers in Palm Beach County are located in Boca Raton and Downtown West Palm Beach. Other employment clusters of significance include Delray Beach, Mangonia Park, the area of West Palm Beach surrounding Mangonia Park, and Palm Beach Gardens.

Figure 12: Map of Household Density and Total Employment by TAZ in Miami-Dade County, 2000



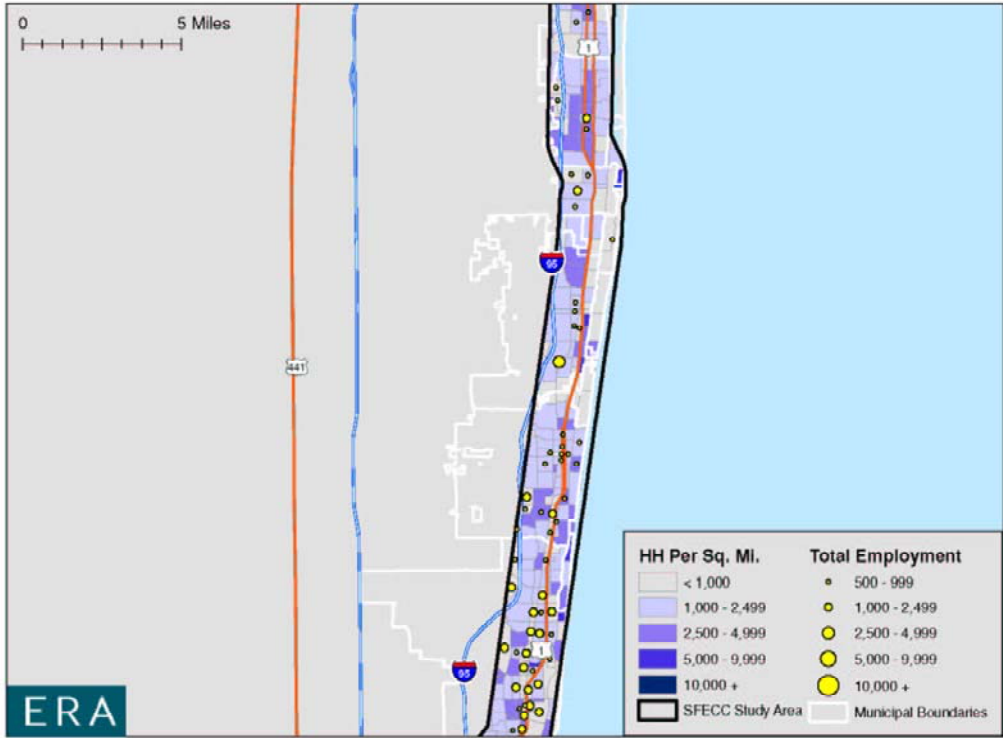
Source: Miami-Dade County MPO; Gannett Fleming; ERA

Figure 13: Map of Household Density and Total Employment by TAZ in Broward County, 2000



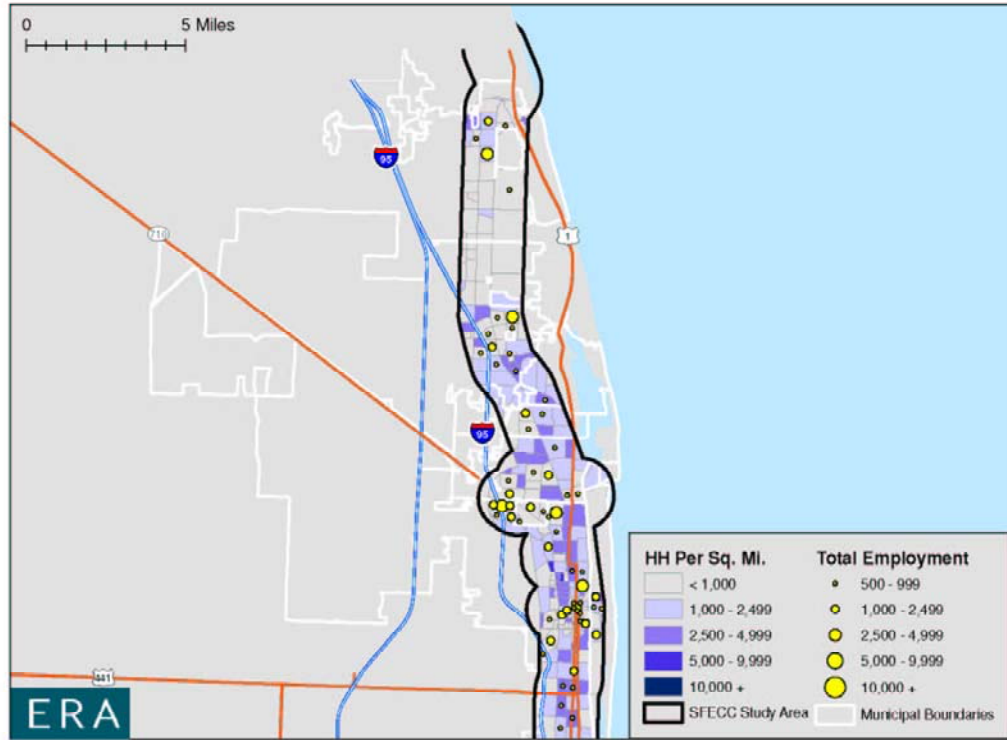
Source: Broward County MPO; Gannett Fleming; ERA

Figure 14: Map of Household Density and Total Employment by TAZ in Southern Palm Beach County, 2000



Source: Palm Beach County MPO; Gannett Fleming; ERA

Figure 15: Map of Household Density and Total Employment by TAZ in Northern Palm Beach County, 2000



Source: Palm Beach County MPO, Gannett Fleming, ERA

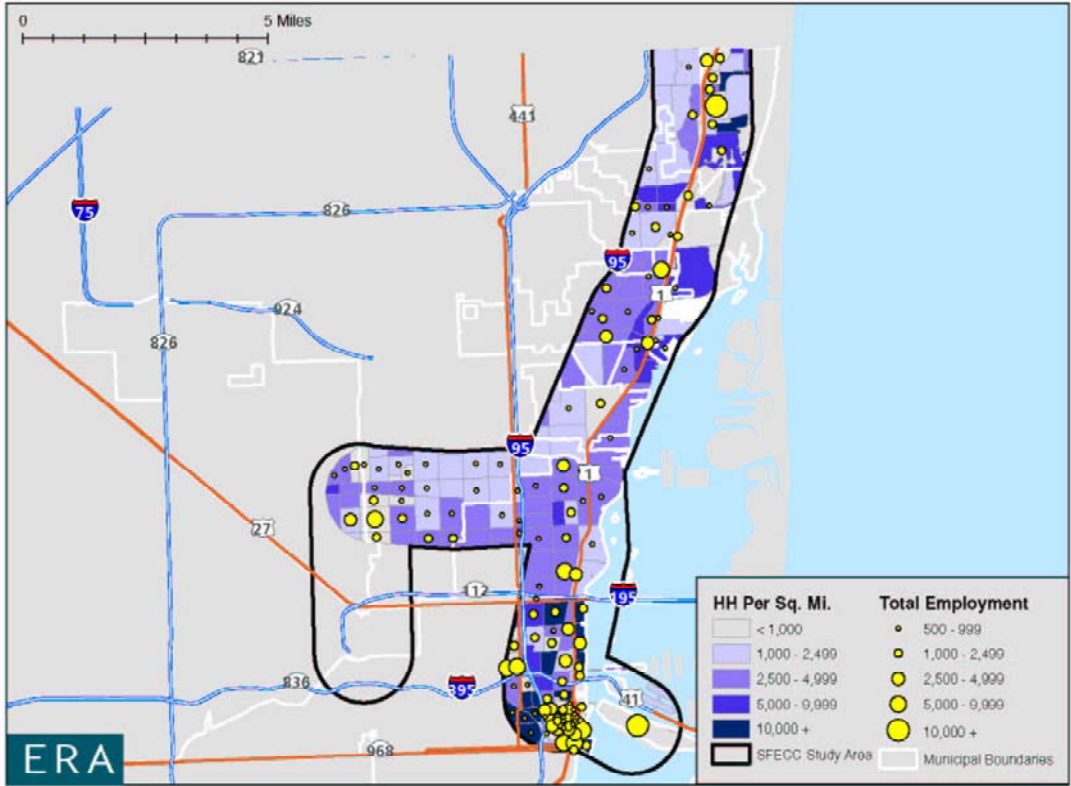
Projected Year (2030)

Projections for the period between 2000 and 2030 indicate that Miami-Dade County employment growth will be concentrated in existing employment centers, such as Downtown Miami and the area surrounding the Aventura Mall (see Figure 16.)

Employment projections for Broward County suggest similar growth patterns to those forecasted for Miami-Dade, with the most significant employment increases expected to occur in existing employment centers, such as Fort Lauderdale (especially downtown) and Pompano Beach. Moderate employment growth is also projected for Deerfield Beach and the section of the corridor that passes through Hollywood, especially to the west of US-1.

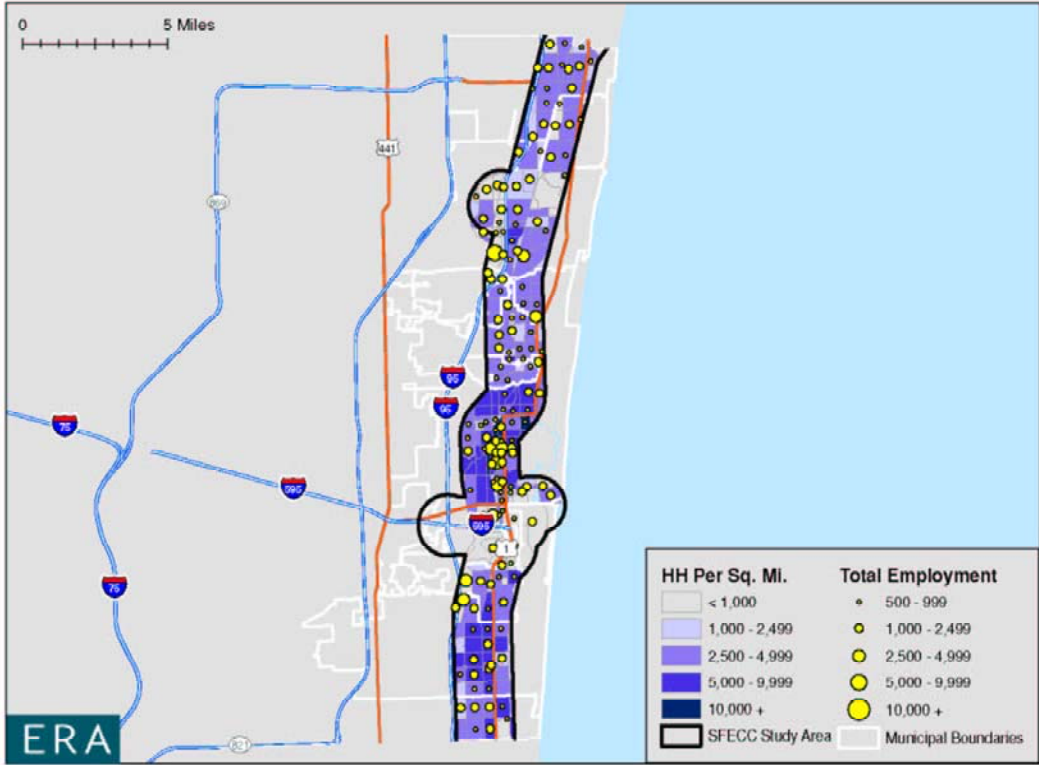
In the southern part of Palm Beach County, it is anticipated that employment growth will be mostly confined to existing employment clusters, with moderate employment increases projected for the northern and southern edges of Boca Raton. Meanwhile, in the central part of the county, significant employment growth is expected in West Palm Beach, particularly in the core downtown area. In addition to the expansion of existing employment centers, secondary employment clusters are expected to emerge in Boynton Beach, as well as in the northern part of the county in Lake Park and Jupiter.

Figure 16: Map of Household Density and Total Employment by TAZ in Miami-Dade County, 2030



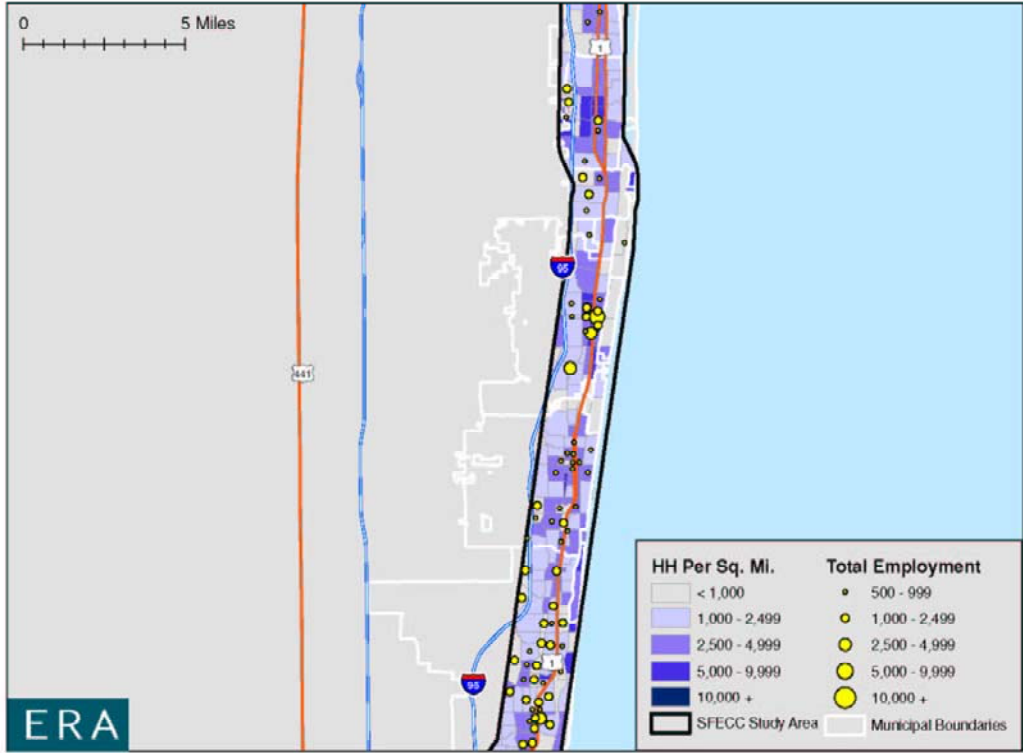
Source: Miami-Dade County MPO; Gannett Fleming; ERA

Figure 17: Map of Household Density and Total Employment by TAZ in Miami-Broward County, 2030



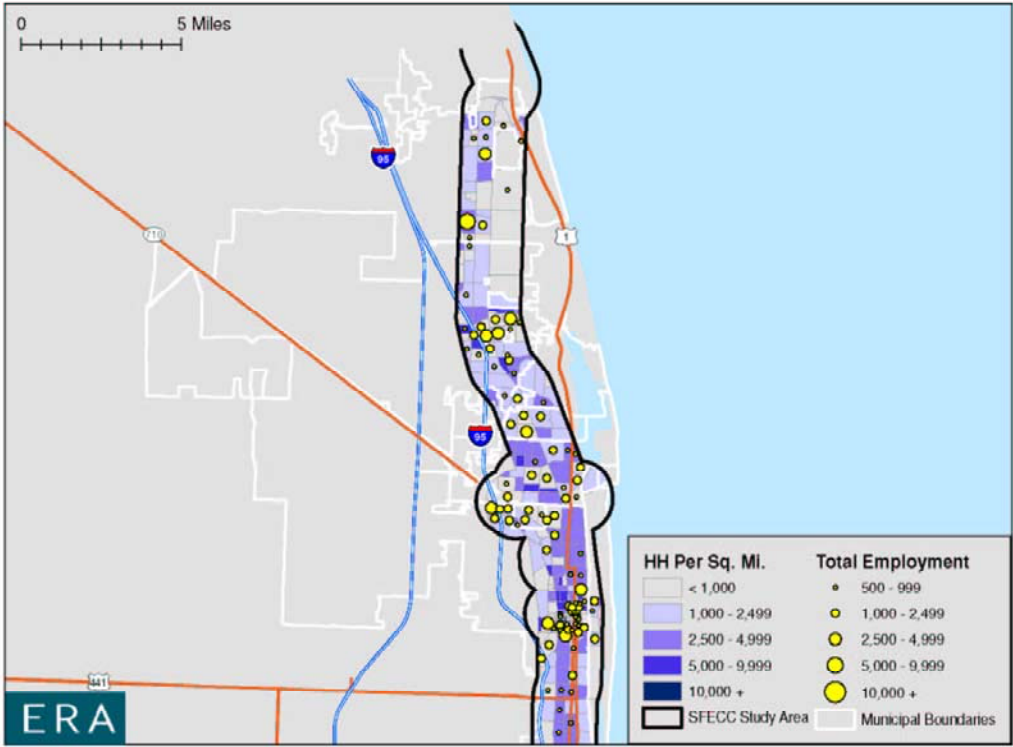
Source: Broward County MPO, Gannett Fleming, ERA

Figure 18: Map of Household Density and Total Employment by TAZ in Southern Palm Beach County, 2030



Source: Palm Beach County MPO; Gannett Fleming; ERA

Figure 19: Map of Household Density and Total Employment by TAZ in Northern Palm Beach County, 2030



Source: Palm Beach County MPO, Gannett Fleming; ERA

Segmentation & Implications

The matrices presented below provide a better understanding of the types of employment concentrations found in the study corridor’s 28 municipalities. The matrix reads from bottom to top, and left to right, with the lower left-hand corner representing the smallest markets with the lowest levels of density, and the largest markets with the highest densities located in the upper right-hand corner. Municipalities that are projected to experience the highest rate of employment growth (upper quartile) between 2000 and 2030 are identified by bolded and underlined text.

Although transit-oriented development typically refers to residential and commercial centers, it is important to note that several concentrations of industrial employment are found in the SFECC. Industrial employment tends to be concentrated in areas surrounding major ocean ports (Miami and Riviera Beach) and airports (Miami and Fort Lauderdale), as well as the area between northern Broward County and central Palm Beach County. While industrial land uses often generate lower real estate values than residential or commercial uses, the employment sectors occupying this type of space tend to offer living-wage job opportunities to low-skilled workers. Industrial land uses are therefore a critical component to the overall economic growth and stabilization in the SFECC.

Table 6: Segmentation of Corridor Municipalities - Industrial Employment

		INDUSTRIAL EMPLOYMENT DENSITY			
		<i>Low</i>	<i>Low-to-Mod</i>	<i>Mod-to-High</i>	<i>High</i>
SIZE OF INDUSTRIAL EMPLOYMENT CONCENTRATION	<i>Large</i>			Miami Hollywood Boca Raton West Palm Beach	Fort Lauderdale Oakland Park Pompano Beach
	<i>Mid-to-Large</i>		Delrey Beach Boynton Beach Lake Worth		Deerfield Beach Mangonia Park Riviera Beach Lake Park
	<i>Small-to-Mid</i>		North Miami Aventura Dania Beach Jupiter	Hallandale Beach Lantana	
	<i>Small</i>	El Portal Miami Shores Biscayne Park North Miami Lighthouse Point North Palm Beach	Palm Beach Gardens	Wilton Manors	

Note: Municipalities in bold are projected to experience a rate of annual growth in the upper quartile relative to the study corridor.

Source: Economics Research Associates, June 2006

Commercial employment centers are often found in places that have a substantial office component, such as the downtowns of major cities (Miami, Fort Lauderdale, and Boca Raton) or in clusters of suburban office parks (Aventura, Pompano Beach, and Delray Beach.) Unlike industrial employment centers, commercial employment can be accommodated by higher-density (higher-value) vertical development that is compatible with residential uses. These places also tend to attract a significant daytime population that affects regional commutation patterns.

Table 7: Segmentation of Corridor Municipalities – Commercial Employment

		COMMERCIAL EMPLOYMENT DENSITY			
		<i>Low</i>	<i>Low-to-Mod</i>	<i>Mod-to-High</i>	<i>High</i>
SIZE OF COMMERCIAL EMPLOYMENT CONCENTRATION	<i>Large</i>		West Palm Beach	Pompano Beach Boca Raton Delray Beach	Miami Aventura Fort Lauderdale
	<i>Mid-to-Large</i>		Deerfield Beach Palm Beach Gardens	Hollywood Oakland Park	North Miami North Miami Beach
	<i>Small-to-Mid</i>	Boynton Beach Lake Worth Jupiter	Lantana Riviera Beach Lake Park	Hallandale Beach Dania Beach	
	<i>Small</i>	El Portal Miami Shores Biscayne Park North Palm Beach	Wilton Manors	Mangonia Park	Lighthouse Point

Note: Municipalities in bold are projected to experience a rate of annual growth in the upper quartile relative to the study corridor.

Source: Economics Research Associates, June 2006

Service employment comprises a number of industries prevalent in the South Florida economy, including hospitality (cruise ships, hotels and lodging, dining and entertainment) and retail. The largest and densest concentrations of service employment are found in places along the SFECC that contain major shopping and entertainment destinations, such as Miami (Port of Miami and the greater Downtown), Aventura (Aventura Mall), Fort Lauderdale (Las Olas Boulevard), Boca Raton (Mizner Park), and West Palm Beach (CityPlace.)

Table 8: Segmentation of Corridor Municipalities - Service Employment

		SERVICE EMPLOYMENT DENSITY			
		<i>Low</i>	<i>Low-to-Mod</i>	<i>Mod-to-High</i>	<i>High</i>
SIZE OF SERVICE EMPLOYMENT CONCENTRATION	<i>Large</i>		Pompano Beach	Delray Beach	Miami Aventura Fort Lauderdale Boca Raton West Palm Beach
	<i>Mid-to-Large</i>	Palm Beach Gardens		North Miami Beach Hollywood Oakland Park Deerfield Beach	North Miami
	<i>Small-to-Mid</i>	Lantana Lake Worth Lake Park	Dania Beach Boynton Beach Riviera Beach Jupiter	Hallandale Beach	
	<i>Small</i>	El Portal Biscayne Park North Palm Beach	Miami Shores Lighthouse Point	Mangonia Park	Wilton Manors

Note: Municipalities in bold are projected to experience a rate of annual growth in the upper quartile relative to the study corridor.

Source: Economics Research Associates, June 2006



APPENDIX

Appendix Table 1: Population & Households by SFECC Municipality (2000)

County	Municipality / Area - South To North	Land Area 1/	Population	Households	Density	
					Population	Households
Miami-Dade	Miami	14.0	100,515	36,408	7,173	2,598
	El Portal	0.7	3,419	1,229	5,002	1,797
	Miami Shores	2.1	10,359	3,924	4,963	1,880
	Biscayne Park	0.6	3,489	1,288	5,642	2,084
	North Miami	4.4	33,107	12,027	7,457	2,709
	North Miami Beach	2.8	20,999	7,370	7,454	2,616
	Aventura	2.0	22,053	9,040	10,771	4,415
	Other Miami-Dade County	7.9	59,666	21,309	7,552	2,697
	Subtotal: Miami-Dade County	34.6	253,607	92,596	7,328	2,676
Broward	Hallandale Beach	3.1	18,542	8,704	6,045	2,838
	Hollywood	8.2	40,058	18,172	4,857	2,203
	Dania Beach	3.3	12,577	5,880	3,849	1,800
	Fort Lauderdale	13.5	64,795	30,786	4,802	2,282
	Wilton Manors	1.4	8,860	4,493	6,154	3,121
	Oakland Park	3.9	24,539	10,189	6,368	2,644
	Pompano Beach	12.8	51,869	19,452	4,043	1,516
	Lighthouse Point	0.2	1,429	822	6,449	3,712
	Deerfield Beach	5.6	30,159	11,826	5,375	2,108
	Other Broward County	2.2	-	-	-	-
	Subtotal: Broward County	54.3	252,827	110,323	4,659	2,033
Palm Beach	Boca Raton	13.1	41,995	20,184	3,213	1,544
	Delray Beach	7.6	30,019	13,038	3,937	1,710
	Boynton Beach	6.5	29,253	11,994	4,485	1,839
	Lantana	3.0	9,140	3,802	3,044	1,266
	Lake Worth	6.4	34,068	13,953	5,344	2,189
	West Palm Beach	13.6	51,359	21,531	3,772	1,581
	Mangonia Park	0.8	1,285	436	1,670	567
	Riviera Beach	5.1	19,425	7,272	3,832	1,434
	Lake Park	2.0	6,910	2,137	3,471	1,074
	North Palm Beach	1.1	4,332	2,038	3,943	1,855
	Palm Beach Gardens	8.8	15,794	7,131	1,801	813
	Jupiter	7.5	9,528	3,876	1,265	515
	Other Palm Beach County	12.6	28,999	14,188	2,306	1,128
		Subtotal: Palm Beach County	88.0	282,106	121,580	3,205
TOTAL CORRIDOR		176.9	788,531	324,493	4,458	1,834

Note: 1/ Land area in square miles

Source: County Metropolitan Planning Organizations; Gannett Heming; Economics Research Associates, June 2006



Appendix Table 2: Population & Households by SFECC Municipality (2030)

County	Municipality / Area - South To North	Land Area 1/	Population	Households	Density	
					Population	Households
Miami-Dade	Miami	14.0	172,411	62,592	12,304	4,467
	El Portal	0.7	3,374	1,191	4,935	1,742
	Miami Shores	2.1	10,344	3,842	4,957	1,841
	Biscayne Park	0.6	3,557	1,289	5,752	2,085
	North Miami	4.4	53,983	18,975	12,159	4,274
	North Miami Beach	2.8	25,423	8,802	9,025	3,125
	Aventura	2.0	24,130	9,662	11,786	4,719
	Other Miami-Dade County	7.9	64,018	22,470	8,103	2,844
	Subtotal: Miami-Dade County	34.6	357,241	128,823	10,323	3,723
Broward	Hallandale Beach	3.1	28,478	12,548	9,285	4,091
	Hollywood	8.2	64,579	27,818	7,830	3,373
	Dania Beach	3.3	24,233	10,741	7,417	3,287
	Fort Lauderdale	13.5	147,635	66,398	10,942	4,921
	Wilton Manors	1.4	10,389	5,162	7,217	3,586
	Oakland Park	3.9	30,442	12,224	7,900	3,172
	Pompano Beach	12.8	78,932	27,626	6,153	2,153
	Lighthouse Point	0.2	1,872	1,049	8,451	4,736
	Deerfield Beach	5.6	43,134	15,783	7,687	2,813
	Other Broward County	2.2	-	-	-	-
Subtotal: Broward County	54.3	429,694	179,349	7,918	3,305	
Palm Beach	Boca Raton	13.1	57,988	26,583	4,437	2,034
	Delray Beach	7.6	42,705	17,238	5,601	2,261
	Boynton Beach	6.5	50,491	19,905	7,742	3,052
	Lantana	3.0	11,770	4,912	3,920	1,636
	Lake Worth	6.4	47,189	17,901	7,402	2,808
	West Palm Beach	13.6	81,440	32,022	5,981	2,352
	Mangonia Park	0.8	2,652	780	3,446	1,014
	Riviera Beach	5.1	30,947	11,268	6,105	2,223
	Lake Park	2.0	9,837	3,179	4,942	1,597
	North Palm Beach	1.1	4,890	2,156	4,452	1,963
	Palm Beach Gardens	8.8	31,097	13,327	3,546	1,520
	Jupiter	7.5	22,028	9,022	2,926	1,198
	Other Palm Beach County	12.6	38,035	18,612	3,024	1,480
	Subtotal: Palm Beach County	88.0	431,070	176,906	4,898	2,010
TOTAL CORRIDOR		176.9	1,217,991	485,071	6,886	2,742

Note: 1/ Land area in square miles

Source: County MPOs; Gannett Fleming; Economics Research Associates, June 2006



Appendix Table 3: Projected Population and Household Growth by SFECCT Municipality, 2000 to 2030

County	Municipality / Area - South To North	% Change, 2000 to 2030		CAGR 1/, 2000 to 2030	
		Population	Households	Population	Households
Miami-Dade	Miami	71.5%	71.9%	1.8%	1.8%
	El Portal	-1.3%	-3.1%	0.0%	-0.1%
	Miami Shores	-0.1%	-2.1%	0.0%	-0.1%
	Biscayne Park	1.9%	0.1%	0.1%	0.0%
	North Miami	63.1%	57.8%	1.6%	1.5%
	North Miami Beach	21.1%	19.4%	0.6%	0.6%
	Aventura	9.4%	6.9%	0.3%	0.2%
	Other Miami-Dade County	7.3%	5.4%	0.2%	0.2%
	Subtotal: Miami-Dade County	40.9%	39.1%	1.1%	1.1%
Broward	Hallandale Beach	53.6%	44.2%	1.4%	1.2%
	Hollywood	61.2%	53.1%	1.6%	1.4%
	Dania Beach	92.7%	82.7%	2.2%	2.0%
	Fort Lauderdale	127.8%	115.7%	2.8%	2.6%
	Wilton Manors	17.3%	14.9%	0.5%	0.5%
	Oakland Park	24.1%	20.0%	0.7%	0.6%
	Pompano Beach	52.2%	42.0%	1.4%	1.2%
	Lighthouse Point	31.0%	27.6%	0.9%	0.8%
	Deerfield Beach	43.0%	33.5%	1.2%	1.0%
	Other Broward County	na	na	na	na
Subtotal: Broward County	70.0%	62.6%	1.8%	1.6%	
Palm Beach	Boca Raton	38.1%	31.7%	1.1%	0.9%
	Delray Beach	42.3%	32.2%	1.2%	0.9%
	Boynton Beach	72.6%	66.0%	1.8%	1.7%
	Lantana	28.8%	29.2%	0.8%	0.9%
	Lake Worth	38.5%	28.3%	1.1%	0.8%
	West Palm Beach	58.6%	48.7%	1.5%	1.3%
	Mangonia Park	106.4%	78.9%	2.4%	2.0%
	Riviera Beach	59.3%	55.0%	1.6%	1.5%
	Lake Park	42.4%	48.8%	1.2%	1.3%
	North Palm Beach	12.9%	5.8%	0.4%	0.2%
	Palm Beach Gardens	96.9%	86.9%	2.3%	2.1%
	Jupiter	131.2%	132.8%	2.8%	2.9%
	Other Palm Beach County	31.2%	31.2%	0.9%	0.9%
Subtotal: Palm Beach County	52.8%	45.5%	1.4%	1.3%	
TOTAL CORRIDOR		54.5%	49.5%	1.5%	1.3%

Note: 1/ Compound Annual Growth Rate

Source: County Metropolitan Planning Organizations; Gannett Fleming; Economics Research Associates, June 2006



Appendix Table 4: Sector Employment by SFECM Municipality (2000)

County	Municipality / Area - South To North	Land Area 1/	At-Place Employment				At-Place Employment Density			
			Industrial	Commercial	Service	Total	Industrial	Commercial	Service	Total
Miami-Dade	Miami	14.0	7,046	18,783	123,964	149,797	503	1,340	8,847	10,690
	El Portal	0.7	41	184	351	576	60	269	513	842
	Miami Shores	2.1	45	852	1,967	2,865	22	408	942	1,373
	Biscayne Park	0.6	2	55	66	121	3	88	106	196
	North Miami	4.4	988	6,912	8,496	16,396	222	1,557	1,914	3,693
	North Miami Beach	2.8	418	4,167	3,391	7,972	148	1,479	1,204	2,830
	Aventura	2.0	557	11,030	5,874	17,460	272	5,387	2,869	8,528
	Other Miami-Dade County	7.9	6,471	9,754	16,206	32,432	819	1,235	2,051	4,105
Subtotal: Miami-Dade County	34.6	15,568	51,736	160,314	227,619	450	1,495	4,633	6,577	
Broward	Hallandale Beach	3.1	1,072	3,172	4,204	8,448	350	1,034	1,371	2,754
	Hollywood	8.2	3,464	6,062	10,052	19,578	420	735	1,219	2,374
	Dania Beach	3.3	914	2,455	3,126	6,494	280	751	957	1,988
	Fort Lauderdale	13.5	7,370	19,173	46,614	73,157	546	1,421	3,455	5,422
	Wilton Manors	1.4	449	1,052	2,246	3,747	312	731	1,560	2,603
	Oakland Park	3.9	4,767	4,492	5,429	14,687	1,237	1,166	1,409	3,811
	Pompano Beach	12.8	10,499	9,412	12,348	32,260	818	734	963	2,515
	Lighthouse Point	0.2	35	480	212	726	158	2,166	956	3,280
	Deerfield Beach	5.6	3,429	3,856	8,479	15,764	611	687	1,511	2,809
	Other Broward County	2.2	453	182	2,071	2,706	202	81	925	1,209
Subtotal: Broward County	54.3	32,452	50,335	94,780	177,567	598	928	1,747	3,272	
Palm Beach	Boca Raton	13.1	4,846	11,930	25,415	42,192	371	913	1,944	3,228
	Delray Beach	7.6	2,010	7,357	9,439	18,806	264	965	1,238	2,467
	Boynton Beach	6.5	1,771	2,324	7,300	11,395	272	356	1,119	1,747
	Lantana	3.0	1,101	1,495	1,489	4,085	367	498	496	1,360
	Lake Worth	6.4	1,848	2,510	5,073	9,431	290	394	796	1,479
	West Palm Beach	13.6	6,441	8,024	39,352	53,818	473	589	2,890	3,952
	Mangonia Park	0.8	1,902	718	940	3,560	2,471	933	1,221	4,626
	Riviera Beach	5.1	2,945	2,519	5,195	10,659	581	497	1,025	2,103
	Lake Park	2.0	1,326	1,456	1,334	4,116	666	731	670	2,068
	North Palm Beach	1.1	120	424	883	1,426	109	386	804	1,298
	Palm Beach Gardens	8.8	1,274	4,420	7,657	13,350	145	504	873	1,522
	Jupiter	7.5	1,242	2,104	6,883	10,229	165	279	914	1,359
	Other Palm Beach County	12.6	773	5,246	6,389	12,409	61	417	508	987
Subtotal: Palm Beach County	88.0	27,600	50,528	117,348	195,476	314	574	1,333	2,221	
TOTAL CORRIDOR		176.9	75,620	152,598	372,443	600,662	427	863	2,105	3,396

Note: 1/ Land area in square miles

Source: County Metropolitan Planning Organizations; Gannett Fleming; Economics Research Associates, June 2006



Appendix Table 5: Sector Employment by SFECM Municipality (2030)

County	Municipality / Area - South To North	Land Area 1/	At-Place Employment				At-Place Employment Density			
			Industrial	Commercial	Service	Total	Industrial	Commercial	Service	Total
Miami-Dade	Miami	14.0	6,466	30,897	161,182	198,546	461	2,205	11,503	14,169
	El Portal	0.7	37	265	443	745	54	388	648	1,089
	Miami Shores	2.1	42	1,216	2,492	3,751	20	583	1,194	1,797
	Biscayne Park	0.6	2	78	84	164	3	127	136	266
	North Miami	4.4	906	10,840	10,819	22,565	204	2,442	2,437	5,082
	North Miami Beach	2.8	383	6,182	4,331	10,896	136	2,195	1,538	3,868
	Aventura	2.0	508	17,504	8,997	27,009	248	8,550	4,394	13,192
	Other Miami-Dade County	7.9	5,911	15,348	21,007	42,266	748	1,943	2,659	5,350
Subtotal: Miami-Dade County	34.6	14,255	82,331	209,354	305,941	412	2,379	6,050	8,841	
Broward	Hallandale Beach	3.1	1,217	4,016	4,905	10,140	397	1,309	1,599	3,306
	Hollywood	8.2	4,704	7,564	11,366	23,637	570	917	1,378	2,866
	Dania Beach	3.3	1,454	4,263	6,900	12,621	445	1,305	2,112	3,863
	Fort Lauderdale	13.5	8,348	23,918	51,658	83,923	619	1,773	3,829	6,220
	Wilton Manors	1.4	510	1,302	2,484	4,298	354	904	1,725	2,985
	Oakland Park	3.9	5,358	5,642	5,998	16,998	1,390	1,464	1,557	4,411
	Pompano Beach	12.8	12,511	14,247	19,922	46,674	975	1,110	1,553	3,638
	Lighthouse Point	0.2	39	581	243	864	178	2,625	1,096	3,901
	Deerfield Beach	5.6	3,897	5,357	10,366	19,622	694	955	1,847	3,497
	Other Broward County	2.2	740	458	3,256	4,456	331	205	1,454	1,991
Subtotal: Broward County	54.3	38,781	67,349	117,097	223,235	715	1,241	2,158	4,114	
Palm Beach	Boca Raton	13.1	5,076	13,555	35,596	54,227	388	1,037	2,723	4,149
	Delray Beach	7.6	1,955	7,527	12,025	21,507	256	987	1,577	2,821
	Boynton Beach	6.5	2,434	6,731	18,115	27,281	373	1,032	2,778	4,183
	Lantana	3.0	1,085	1,433	3,260	5,778	361	477	1,086	1,924
	Lake Worth	6.4	1,867	3,004	7,246	12,118	293	471	1,137	1,901
	West Palm Beach	13.6	7,277	9,547	62,850	79,673	534	701	4,615	5,851
	Mangonia Park	0.8	2,014	1,419	2,637	6,070	2,617	1,844	3,426	7,887
	Riviera Beach	5.1	3,721	4,915	8,494	17,130	734	970	1,676	3,379
	Lake Park	2.0	1,259	4,690	3,138	9,087	632	2,356	1,576	4,565
	North Palm Beach	1.1	115	414	1,103	1,633	105	377	1,005	1,486
	Palm Beach Gardens	8.8	1,739	9,367	18,227	29,333	198	1,068	2,078	3,345
	Jupiter	7.5	1,208	5,842	12,758	19,807	160	776	1,694	2,631
	Other Palm Beach County	12.6	772	5,755	8,510	15,038	61	458	677	1,196
Subtotal: Palm Beach County	88.0	30,522	74,200	193,961	298,683	347	843	2,204	3,393	
TOTAL CORRIDOR	176.9	83,558	223,880	520,413	827,859	472	1,266	2,942	4,680	

Note: 1/ Land area in square miles

Source: County MPOs; Gannett Fleming; Economics Research Associates, June 2006

Appendix Table 6: Projected Sector Employment Growth by SFECC Municipality, 2000 to 2030

County	Municipality / Area - South To North	% Change, 2000 to 2030				CAGR 1/, 2000 to 2030			
		Industrial	Commercial	Service	Total	Industrial	Commercial	Service	Total
Miami-Dade	Miami	-8.2%	64.5%	30.0%	32.5%	-0.3%	1.7%	0.9%	0.9%
	El Portal	-9.8%	44.0%	26.3%	29.4%	-0.3%	1.2%	0.8%	0.9%
	Miami Shores	-6.2%	42.7%	26.7%	30.9%	-0.2%	1.2%	0.8%	0.9%
	Biscayne Park	0.0%	43.6%	27.3%	35.2%	0.0%	1.2%	0.8%	1.0%
	North Miami	-8.3%	56.8%	27.3%	37.6%	-0.3%	1.5%	0.8%	1.1%
	North Miami Beach	-8.4%	48.4%	27.7%	36.7%	-0.3%	1.3%	0.8%	1.0%
	Aventura	-8.8%	58.7%	53.2%	54.7%	-0.3%	1.6%	1.4%	1.5%
	Other Miami-Dade County	-8.7%	57.3%	29.6%	30.3%	-0.3%	1.5%	0.9%	0.9%
Subtotal: Miami-Dade County		-8.4%	59.1%	30.6%	34.4%	-0.3%	1.6%	0.9%	1.0%
Broward	Hallandale Beach	13.6%	26.6%	16.7%	20.0%	0.4%	0.8%	0.5%	0.6%
	Hollywood	35.8%	24.8%	13.1%	20.7%	1.0%	0.7%	0.4%	0.6%
	Dania Beach	59.1%	73.7%	120.8%	94.3%	1.6%	1.9%	2.7%	2.2%
	Fort Lauderdale	13.3%	24.7%	10.8%	14.7%	0.4%	0.7%	0.3%	0.5%
	Wilton Manors	13.5%	23.8%	10.6%	14.7%	0.4%	0.7%	0.3%	0.5%
	Oakland Park	12.4%	25.6%	10.5%	15.7%	0.4%	0.8%	0.3%	0.5%
	Pompano Beach	19.2%	51.4%	61.3%	44.7%	0.6%	1.4%	1.6%	1.2%
	Lighthouse Point	12.3%	21.2%	14.7%	18.9%	0.4%	0.6%	0.5%	0.6%
	Deerfield Beach	13.6%	38.9%	22.3%	24.5%	0.4%	1.1%	0.7%	0.7%
	Other Broward County	63.5%	151.6%	57.2%	64.7%	1.7%	3.1%	1.5%	1.7%
Subtotal: Broward County		19.5%	33.8%	23.5%	25.7%	0.6%	1.0%	0.7%	0.8%
Palm Beach	Boca Raton	4.7%	13.6%	40.1%	28.5%	0.2%	0.4%	1.1%	0.8%
	Delray Beach	-2.8%	2.3%	27.4%	14.4%	-0.1%	0.1%	0.8%	0.4%
	Boynton Beach	37.5%	189.6%	148.2%	139.4%	1.1%	3.6%	3.1%	3.0%
	Lantana	-1.5%	-4.2%	119.0%	41.5%	0.0%	-0.1%	2.6%	1.2%
	Lake Worth	1.0%	19.7%	42.8%	28.5%	0.0%	0.6%	1.2%	0.8%
	West Palm Beach	13.0%	19.0%	59.7%	48.0%	0.4%	0.6%	1.6%	1.3%
	Mangonia Park	5.9%	97.6%	180.5%	70.5%	0.2%	2.3%	3.5%	1.8%
	Riviera Beach	26.4%	95.1%	63.5%	60.7%	0.8%	2.3%	1.7%	1.6%
	Lake Park	-5.1%	222.2%	135.3%	120.8%	-0.2%	4.0%	2.9%	2.7%
	North Palm Beach	-4.0%	-2.2%	25.0%	14.5%	-0.1%	-0.1%	0.7%	0.5%
	Palm Beach Gardens	36.6%	111.9%	138.1%	119.7%	1.0%	2.5%	2.9%	2.7%
	Jupiter	-2.7%	177.7%	85.3%	93.6%	-0.1%	3.5%	2.1%	2.2%
Other Palm Beach County	-0.1%	9.7%	33.2%	21.2%	0.0%	0.3%	1.0%	0.6%	
Subtotal: Palm Beach County		10.6%	46.8%	65.3%	52.8%	0.3%	1.3%	1.7%	1.4%
TOTAL CORRIDOR		10.5%	46.7%	39.7%	37.8%	0.3%	1.3%	1.1%	1.1%

Note: 1/ Compound Annual Growth Rate

Source: County Metropolitan Planning Organizations; Gannett Fleming; Economics Research Associates, June 2006