## COMMUNICATION PACKAGE
### December 2013

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Editorial: Counties along Indian River Lagoon need demonstration of unity

By Editorial Board

Sunday, September 22, 2013

A lot may be riding on the determination, leadership and political skills of the six individuals who gathered in Fort Pierce recently. If successful, they could be key to restoring and protecting the health of the Indian River Lagoon and what that means to the region’s history, cultural, environmental and economic vitality.

The task will not be easy nor quickly completed, but, by coming together to begin whatever actions they may take, a first step toward success has been achieved.

Those six individuals, including Martin County Commissioner Ed Fielding who put them together, are the new Indian River Lagoon Counties Collaborative — one elected representative from each of the six counties along the 155-mile route of the lagoon.

Their goal is to find ways to work together — politically and financially — to save the lagoon which has been pummelled this summer by manmade pollution sources that threaten the unique biodiversity of the waterway to such an extent that questions have been raised about its potential survival.

As the members of the collaborative have returned to their home counties from the meeting in Fort Pierce, their first task must be securing from their fellow elected officials in those counties support for the efforts the collaborative may choose to take both on an individual county basis and throughout the region. That may include financial commitments, particularly in the cost of mapping the entire waterway to collect data on environmental resources within the lagoon and pollution sources and levels.

That data will be critical as the collaborative hopes to base potential regional policies and actions on scientific information gathered through archived studies, monitoring and advice from the science community.

The collaborative is expected to meet again within the month to determine how to compile and analyze data on the lagoon. Members may also begin considering what state and federal funding assistance may be available for that data collection.

Some of the pollution problems impacting the lagoon differ from north to south and in the central area of the lagoon. But, whatever those problems are — from septic tank...
leaks and agricultural and fertilizer runoff to discharges of polluted water from Lake Okeechobee — the problems ultimately are shared as parts of the lagoon break down.

While momentum for action on the lagoon has been growing at local, regional, state and national levels, maintaining that momentum all the way through toward implementing policies and programs to improve the lagoon’s health may be a challenge.

“Im concerned we may lose focus, lose energy,” Fielding admitted. “We need to maintain momentum.”

That’s why he called for another meeting fairly quickly by the collaborative members and why county staffs are expected to start coordinating with one another. And, that’s why members need to begin taking formal actions to show they plan to do more than talk about the lagoon problems.

By getting together, members have taken one step. Bigger steps are needed soon.

INDIAN RIVER
LAGOON
COUNTIES
COLLABORATIVE
Volusia County Councilman Joshua Wagner
Brevard County Commissioner Chuck Nelson
Indian River County Commissioner Peter O’Bryan
St. Lucie County Commissioner Chris Dradovsky
Martin County Commissioner Ed Fielding
Palm Beach Commissioner Hal Valeche
September 25, 2013

The Honorable Sarah Heard
Chair, Martin County
Board of County Commissioners
2401 Southeast Monteray Road
Stuart, Florida 34996

Dear Chair Heard:

The Department of Economic Opportunity has reviewed Martin County adopted amendment 13-1ESR ("the Amendment") in accordance with the expedited state review process set forth in Sections 163.3184(2), (3) and (5), Florida Statutes. As you are aware, several private parties have challenged whether the Amendment is "in compliance" as that term is defined in section 163.3184, Florida Statutes. In addition, the Department of Agriculture (DACS) and the South Florida Water Management District (SFWMD) have requested that the Department file an additional compliance challenge based on their findings of adverse impacts on important state resources (water supply and agriculture).

The issues raised by the reviewing agencies are significant. According to the reviewing agencies, the County appears to be attempting to adopt a local approach to water-management and agriculture-management issues that the Florida Legislature has specifically found warrant a statewide and regional approach. This broader, balanced approach is necessary to ensure responsible management, utilization, and preservation of these important state resources. The State of Florida cannot have, and will not tolerate, local regulations that are inconsistent with this approach.

SFWMD notes that Martin County proposes to "regulate impacts associated with water withdrawals" by disallowing withdrawals that would "change normal seasonal variation of wetland water levels." As SFWMD points out, the water management districts—and not local governments—have sole and pre-emptive authority to permit consumptive water uses. The Florida Legislature has stated in no uncertain terms that "[b]ecause water constitutes a public resource benefiting the entire state, it is the policy of the Legislature that the waters in the state be managed on a state and regional basis." § 373.016(4)(a), Florida Statutes. Thus, the Legislature has vested in the Department of Environmental Protection and the water management districts "the power and responsibility to accomplish the conservation, protection, management, and control of the waters of the state," and has specifically pre-empted local governments from regulating consumptive use. §§ 373.016(5), 373.217, Florida Statutes. The growth management law recognizes this regional and statewide approach and
directs, among other references to regional water plans, that “[c]oordination ... with the appropriate water management district’s regional water supply plans ... shall be a major objective of the local comprehensive planning process.” § 163.3177(4)(a).

DACS likewise raises serious concerns. It notes that the Florida Legislature has specifically sought to “protect reasonable agricultural activities conducted on farm lands from duplicative regulation,” and has prohibited local governments from adopting or enforcing “any ordinance, resolution, regulation, rule, or policy to prohibit, restrict, regulate, or otherwise limit an activity of a bona fide farm operation on land classified as agricultural ..., if such activity is regulated through implemented best management practices, interim measures, or regulations adopted ... by the Department of Environmental Protection, the Department of Agriculture and Consumer Services, or water management districts ... as part of a statewide or regional program.” § 163.3162, Florida Statutes. See also § 823.14(6), Florida Statutes. DACS notes that Martin County appears to be attempting to engage in such regulation through various provisions of the Amendment. For its part, the growth management law requires a “future land use plan element designating proposed future general distribution, location, and extent of the uses of land for ... agriculture.” § 163.3177(6)(a), Florida Statutes. Comprehensive plans are intended to regulate growth and development. Agricultural uses, however, are expressly excluded from the definition of development in sections 163.3164(14) and 308.04(3), Florida Statutes. Agricultural uses cannot be regulated under a local comprehensive plan. The growth management law also requires that the “amount of land designated for future planned uses shall provide a balance of uses that foster vibrant, viable communities and economic development opportunities.” § 163.3177(6)(a)(4), Florida Statutes. Agricultural use is a critical element in a balanced plan and a driver of economic growth. If, as DACS contends, the Amendment has an adverse impact on agricultural use that is otherwise regulated through statewide and regional approaches, then the Amendment may not properly provide for agricultural use and an overall balance of uses.

In sum, SFWMD and DACS have raised serious concerns about the compliance of the Amendment with both growth-management and other state laws. Because the concerns raised by DACS and SFWMD will be litigated in the proceedings already initiated by the private parties, the Department does not believe it is necessary to allocate its limited resources to litigating an additional and potentially duplicative challenge. This decision is not meant to express or imply a determination of compliance—a determination that the Department or the Administration Commission can make in a final order after the administrative law judge submits a recommended order in the pending challenges.

The Department notes, however, that the County may resolve the significant concerns raised by entering into a compliance agreement. See § 163.3184(6)(a), Florida Statutes. The Department strongly encourages the County to explore this option and to recognize that statewide and regional approaches are the better and required method of managing communal water and agricultural resources. Should litigation proceed to a recommended order subject to
the Department’s review, we will closely examine whether Martin County has in fact exceeded its legal authority.

Because the Amendment has been challenged by private parties, the Amendment is not effective at this time and no development orders, development permits, or land uses dependent on the Amendment may be issued or commenced.

Sincerely,

[Signature]

William B. Killingsworth, Director
Division of Community Development

cc: Ms. Nicki van Vorno, Growth Management Director, Martin County Comprehensive Planning Division
    Mr. Michael Busha, AICP, Executive Director, Treasure Coast Regional Planning Council
OUTREACH

- Met with Melanie Carr, Florida Department of Transportation, and two consultants from CDM Smith, Rob Vickers and Amie Longstreet, to discuss the potential for a more meaningful role for RPCs in the state’s rural transportation planning process. Provided contracts and scopes of work between Departments of Transportation and their RPCs from the states of Kentucky, Missouri, North Carolina, and Tennessee as examples. Discussions are ongoing.
- Conducted activities to qualify FRCA as a “supporting organization” for the Florida Energy Summit taking place in October.
- To assist the Florida Department of Economic Opportunity and Florida Division of Emergency Management with a joint initiative to support the National Disaster Recovery Framework, provided a list of RPC Long Term Disaster Recovery Points of Contact and resources RPCs bring to the table to assist with long term recovery efforts.
- Attended the American Planning Association, Florida Chapter’s annual conference and staffed a booth in the exhibit hall to promote the local government services offered by the RPCs and the role of RPCs in economic development.
- Distributed information pertaining to and encouraged RPCs to engage in Local Work Days activities, which occurred on September 6. Its purpose was to encourage members of the Local Government Coalition, which includes the RPCs, to “engage, educate and interact with their communities by celebrating the trusted services that local governments provide.” This is an initiative of the Florida League of Cities.

RESOURCE DEVELOPMENT/CAPACITY BUILDING

- Participated in Enterprise Florida’s monthly stakeholders conference call, which focused primarily on the new TEAM FLORIDA marketing campaign and outreach to other states.
- Attended a meeting of the Florida Defense Support Task Force and shared information with the RPC Executive Directors pertaining to the Florida Department of Economic Opportunity’s top tier sites for acquisition of non-conservation encroachment buffers for military installations, which were presented at the meeting and endorsed by the Task Force.
- Shared with the RPC Executive Directors Bob Romig’s regional governance presentation given at the Florida Transportation Commission Workshop, which included policy considerations to address regional planning.
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- Participated in a meeting of the Rural Economic Development Initiative where Enterprise Florida’s legislative recommendations for rural economic development were distributed and reviewed. A presentation on the North Florida Intermodal Park on Plum Creek’s property in Columbia County was also given (see http://www.ccfledd.com/intermodalpark/).
- Attended a meeting with Brian Teeple (NEFRC), Manny Pumariaga (TBRPC), Hugh Harling (ECRPRC), Charles Blume (ARPC) and representatives of the Florida Division of Emergency Management to discuss changes to the Regional Domestic Security Task Force contract and scope of work for the 2013-14 Fiscal Year.
- Distributed grant opportunity announcements to the RPC Executive Directors pertaining to the Florida Department of Environmental Protection and Department of Commerce, Coastal and Estuarine Land Conservation Program.
- Reviewed and provided extensive comments on Enterprise Florida’s NEXT LEVEL initiative to better link this proposed local economic development initiative with RPC resources.
- Participated in a SouthEast Regional Directors Institute teleconference to participate in a discussion regarding regional challenges in several member states.

LEGISLATIVE SUPPORT

- Began a budget data gathering exercise at the request of the Senate Transportation and Economic Development Appropriations Subcommittee, which will be submitted in October.
- Attended a Legislative Dialog Community Meeting in Tallahassee and provided information on the role of RPCs in economic development to Representative Michelle Rehwinkel Vasilinda (Tallahassee-D) and Representative Alan Williams (Tallahassee-D).
- While at the APA Florida conference, provided Representative Bobby Powell (West Palm Beach-D), who was also in attendance, with the same information described in the bullet point above.
- Reviewed newly filed bills for the 2014 Legislative Session and attended legislative committee meetings the week of September 23rd.

ADMINISTRATIVE

- Prepared meeting summaries from the August FRCA meetings and identified speakers and developed the agendas for the October FRCA meetings.
- Developed the 2014 FRCA meeting calendar, which will be approved in October.
- Finalized hotel and catering contract negotiations for the October and December 2013 and February, March, and April 2014 FRCA meetings and January 2014 FRCA strategic planning retreat.
OUTREACH

- Met with Chad Poppell, Chief of Staff of the Florida Department of Economic Opportunity, to help the Department begin the process of identifying and nominating non-voting, ex-officio representatives to each regional planning council, pursuant to s. 186.504, F.S.
- Attended a Competitive Florida Workshop hosted by the Florida Department of Economic Opportunity, which was designed to explain the program to local communities and seek input on its further development.
- Attended the Clean Energy Congress 2.0, the outcome of which will be development of key policy priorities and talking points to be shared with Florida’s lawmakers.
- Attended a Florida Fish and Wildlife Conservation Commission meeting, which focused on developing the strategic direction of the agency in conjunction with the priorities of its Commissioners.
- Attended the Florida Chamber Foundation’s Future of Florida Forum, which provided an opportunity to interact with representatives of the business and economic development community; during the Forum, the regional planning councils were again recognized as Six Pillars Communities and presented with an award.
- Along with Brian Teeple (NEFRC), Chair, Scott Koons (NCFRPC), and Pat Steed (CFRPC), met with Barbara Foster, Chief of the Bureau of Planning and Partnerships in the Division of Strategic Business Development at the Florida Department of Economic Opportunity, to discuss future partnership opportunities with the regional planning councils and implementation of the State Strategic Plan for Economic Development.
- Along with Brian Teeple (NEFRC), Chair, Scott Koons (NCFRPC), and Pat Steed (CFRPC), met with Bill Killingsworth, Director of the Division of Community Development at the Florida Department of Economic Opportunity, to discuss the relationship between regional planning councils and the Department, with a focus on how the councils are uniquely positioned to provide statewide coverage to help carry out the Department’s policies and programs.
- Met with Mark Reichert, Assistant Executive Director of the Florida Transportation Commission, to discuss the Commission’s developing priorities related to regionalism and identify any potential impacts on regional planning councils.

RESOURCE DEVELOPMENT/CAPACITY BUILDING

- Worked with staff at the SouthEast Regional Directors Institute on tasks leading up to the Florida Regional Councils Association’s Strategic Assessment Retreat, including
providing input on the board member/stakeholder survey and developing a plan for its
distribution in November.

- Participated by teleconference in Enterprise Florida’s quarterly Stakeholders Committee
  and Board of Directors meetings; among the many presentations made over the two-
day event was one on the South Florida and Treasure Coast Regional Planning Councils’
joint initiative – Seven50 – a blueprint for ensuring economic prosperity and the best-
possible quality of life for Southeast Florida (see http://seven50.org/).
- Participated in a meeting of the Rural Economic Development Initiative, which included
discussions pertaining to the Florida Main Street Program, economics of trails, and
Florida Department of Transportation’s upcoming review of the rural transportation
planning process.
- On behalf of Brian Teeple (NEFRC), Chair, served as the Florida Regional Councils
Association representative at the quarterly meeting of the State Emergency Response
Commission.
- Distributed grant opportunity announcements to the RPC Executive Directors pertaining
to the U.S. Department of Agriculture’s Rural Community Investment Initiative and the
Wells Fargo Foundation and National Fish and Wildlife Foundation’s joint program to
support projects that link economic development and community well-being to the
health of the environment.
- Participated in two Energy Resiliency Strategy Working Group teleconferences and
reviewed and edited the draft, 122-page Florida Energy Resiliency Report, and provided
comments to staff at the Tampa Bay Regional Planning Council.
- Responded to requests for information from the National Association of Development
Organizations pertaining to its state association project, which included updating
responses to a questionnaire that was first completed approximately two years ago;
upon its completion, the project will be shared with the regional planning councils.

LEGISLATIVE SUPPORT

- Worked with staff at the Florida Association of Counties to remove from its draft 2014
  Legislative Priorities and Policies, obsolete language pertaining to regional planning
councils, while maintaining support for regional planning council funding and technical
assistance activities.
- Compiled and distributed to the Executive Directors the membership lists for the Florida
  Association of Counties and Florida League of Cities legislative committees that address
regional planning council issues for purposes of outreach and support of regional
planning council funding in the legislature.
- Completed the compilation of regional planning council budgets, broken down by local,
state, and federal funding categories, and provided it to the Senate Transportation and
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- Economic Development Appropriations Subcommittee, as requested by its Staff Director.
- Reviewed newly filed bills for the 2014 Legislative Session and attended legislative committee meetings the week of September 7th.

**ADMINISTRATIVE**

- Organized and participated in a conference call to brief the FRCA President, Commissioner Patty Asseff, on the activities and organizational plans associated with the Florida Regional Councils Association’s Strategic Assessment Retreat.
- Participated in the October FRCA meetings.
- Executed contracts with the Doubletree Hotel for the January, February, March, and April Florida Regional Councils Association meetings.
OUTREACH

- Along with Bruce Ballister, Economic Development Planner at the Apalachee Regional Planning Council, met with Dr. Jim Murdaugh, President of Tallahassee Community College and Chair of the Tallahassee Economic Development Council, to discuss the role of these three organizations in regional economic development and a visioning initiative.
- Met with Sally Mann, Director of Intergovernmental Programs, to be briefed on a staff reorganization within her office and significant, on-going initiatives within the Department.
- Worked with staff in the Governor’s Appointments Office to help expedite two regional planning council appointments.
- Provided staff support and assistance to the new Executive Director of the Apalachee Regional Planning Council, Chris Rietow.

RESOURCE DEVELOPMENT/CAPACITY BUILDING

- Collected from each regional planning council and submitted to the Florida Department of Economic Opportunity the required data for the first quarter of the 2013-14 Fiscal Year, to support and demonstrate implementation of the Florida Strategic Plan for Economic Development.
- Participated in the Enterprise Florida Stakeholders Council monthly conference call, which addressed the continued legislative scrutiny of the Quick Action Closing Fund, as well as legislation addressing Enterprise Zones and Brownfields. Council members were briefed on the Governor’s business development activities, including a trip to Japan, Germany, and New York, as well as new business announcements in Hillsborough County, Polk County, and the cities of Melbourne, Panama City, and Tampa.
- Participated by teleconference in a Florida Defense Support Task Force meeting, during which the Governor’s new Washington Representative for State/Federal Issues, Doug Callaway, was introduced, and which addressed anticipated legislative issues for the 2014 Legislative Session, including a House Subcommittee on Veterans and Military Affairs proposed committee bill addressing support for military veterans and their families.
- Participated in a meeting and provided support to the Safe Mobility for Life Coalition (December 1-7 is Older Driver Safety Awareness Week; see http://www.safeandmobileseniors.org/ODSAW.htm, for more information).
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LEGISLATIVE SUPPORT

- Issued a November Legislative Highlights and FRCA bill tracking report.
- Reviewed newly filed bills for the 2014 Legislative Session and attended legislative committee meetings the week of November 4, 2013.

ADMINISTRATIVE

- Worked with staff at the SouthEast Regional Directors Institute on tasks to support FRCA’s Strategic Assessment Retreat in January, including scheduling 18 appointments for face-to-face interviews with 33 individuals and sending out the strategic assessment on-line survey to over 600 regional planning council board members and stakeholders.
- Prepared the October FRCA partners and business meeting summaries and confirmed and prepared speakers for the November FRCA meetings, including representatives from the Florida Department of Economic Opportunity, Florida Department of Transportation, Florida Fish and Wildlife Conservation Commission, Florida Chamber of Commerce, Florida Transportation Commission, Florida Conservation Coalition, Florida League of Cities, and Florida Association of Counties.
- Made minor updates to the FRCA website.
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The University of Central Florida is a public, multi-campus, metropolitan research university, dedicated to serving its surrounding communities with their diverse and expanding populations, technological considerations, and international partners. The mission of the university is to offer high-quality undergraduate and graduate education, student development, and continuing education; to conduct research and creative activities; and to provide services that enhance the intellectual, cultural, environmental, and economic development of the metropolitan region, address national and international issues in key areas, establish UCF as a major presence, and contribute to the global community.

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The College of Business Administration advances the university’s mission and goals in providing intellectual leadership through research, teaching, and service. The college is striving to enhance graduate programs, while maintaining the strong undergraduate base. The college delivers research and quality business education programs at the undergraduate, masters, doctoral, and executive levels to citizens of the state of Florida and to select clientele nationally and internationally.
Published quarterly by the Institute for Economic Competitiveness, College of Business Administration, University of Central Florida

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HIGHLIGHTS OF THE OCTOBER 2013-2016
FLORIDA FORECAST

- As institutional investors leave Florida’s housing market with impending regulations on qualified mortgages, will housing finance enable traditional buyers to fill the void? If not, the recent Bull Run will lose its steam.

- Housing finance remains constrained. As of September, 41.8% of single-family transactions are cash sales. A normalized housing market would have that percentage at around 10%.

- Payroll job growth year-over-year should average 2.0% in 2013, 2.2% in 2014, 2.0% in 2015, and 1.9% in 2016. It will be the 4th quarter of 2016 before payrolls recover to their pre-recession levels.

- Labor force growth in Florida will average 1.5% from 2014-2016. This will slow the pace of decline for the unemployment rate (U-3) in the state. Labor force growth will have averaged just 0.9% during 2010-2013 and is in part responsible for the rapid pace of the decline in the unemployment rate during that time period.

- Unemployment rates have fallen from their peaks, in part due to a low labor force participation rate (59.8% in August 2013), and they will continue to decline through 2016. The pace of decline will moderate as labor force growth picks up. Despite this headwind, the unemployment rate should hit 6.4% in the second half of 2016.

- Underemployment (U-6) in Florida, a broader measure of labor market weakness than headline unemployment (U-3), came in at 15.1% for the year ending 2nd quarter 2013.

- The sectors expected to have the strongest average growth during 2013-2016 are Construction (9.2%); Professional and Business Services (3.4%); Trade, Transportation & Utilities (2.6%); Education & Health Services (2.1%); and Leisure & Hospitality (1.8%).

- Housing starts jumped in 2013. Total starts will be over 117,000 in 2014, just over 151,000 in 2015, and then hit 167,400 in 2016. Average annual growth in housing starts will be 30.3% during 2013-2016.

- Real Gross State Product (RGSP) will expand 2.4% in 2013, then accelerate to 2.6% in 2014, and 3.3% in 2015 before easing to 3.0% in 2016. Average growth will be 2.8% during 2013-2016.

- Real personal income growth for 2012 slowed to 1.4%. From 2013-2016 real personal income growth will average 3.1%, with 2013 growth at 1.7% that will accelerate to 3.8% in 2014.

- Low inventories and rising house prices have triggered a surge in home construction. Housing starts will average 30.3% growth during 2013-2016.

- Retail sales will grow at an average pace of 4.1% during 2013-2016.
FLORIDA'S HOUSING MARKET

Investor Activity Slowing

Data recently released by Florida Realtors depicts a housing market that is getting hotter, if not overheating. Median sales price for single-family homes increased $23,500 in September year-over-year and now stands at $170,000. The townhome/condominium market is also showing significant gains as the median sales price increased $24,750 year-over-year and registered $130,000 in September.

Months supply of inventory in September rose from May levels and is at 3.3 months, which is down from 6.4 months a year ago. Distressed sales of single-family homes in the form of short sales are continuing to contract year-over-year (-31.8%), but foreclosure/REO sales are up sharply versus September 2012 (20.2%) and traditional sales were up 37.8% over the same time period. The percentage of closed sales of single-family homes that were cash transactions stood at 41.8% in September and for condos that figure was even higher as 67.4% of all closings were cash. Both of these percentage rates of cash transactions have fallen over the course of 2013, suggestive of a lessening role of investors in Florida’s housing market.

Increased investor participation around the state has been driving these high percentages of cash transactions with hedge funds and private equity seeking both the high yields that the current rental market provides (rents have steadily risen over the past few years) and the likely capital gain when they sell these properties down the road at a price above the purchase price. But the role of investors is starting to wane as evidenced by a falling share of cash transactions.

As we have discussed for much of this year, at some point the housing market baton has to be passed from institutional buyers paying cash for homes to traditional home buyers that rely on financing to make their purchase. Even the most polished relay team can stumble when it comes to this passing of the baton and if housing finance does not help fill the gap left by exiting investors, then the housing market in Florida will lose momentum.

The Mortgage Bankers Association’s Credit Availability Index declined in both August and September where it stands at 110.7. The index is benchmarked to 100 in March 2012 and to get a sense how far the housing finance pendulum has swung, if the index had been tracked in 2007 it would have stood at around 800!

New regulations on qualified mortgages, part of the massive Dodd-Frank financial regulation law, are set to kick in early 2014. This may be a roadblock for expanded mortgage availability as some estimates suggest that 20% of existing mortgages would not have qualified under the new regulations.

Figure 1 depicts the monthly realtor sales of existing single-family homes, as well as the 12-month moving average of these sales. Sales have been on an upward path from their bottom in January 2008, and since that point sales have continued to improve. While the overall trend is upward, monthly sales have wobbled at times as the economic and demographic underpinnings of the housing market are slowly strengthening. As the foundation for a healthy housing market continues to solidify, we can expect that the upward trend in sales will stabilize, provided housing finance begins to normalize.

Figure 2 displays median sales prices for single-family existing homes. While housing prices have not followed the consistent upward trend in sales, it appears now that
the prices are on an upward climb, but it is clear that the recent double digit pace of price increases is unsustainable. In 2012, prices bounced off a bottom after lingering along that bottom for the better part of two years. Over the past year, the 12-month moving average of median sales prices has risen by nearly $21,000. This recovery in the housing market is a key part of Florida’s continued economic recovery, and if this momentum can be at least partially sustained, it will help boost economic growth in the years to come.

Homeowners are still well below the levels of home equity wealth they had seen at the peak of the housing market (median prices are currently $87,800 below the 2006 peak of $257,800), but rising prices have allowed many homeowners who had previously been underwater in their mortgages to at long last take a breath.

Whether this newfound oxygen will be sufficient to stoke the flames of consumer spending growth is not clear yet. The woodpile is still damp with the memory of a financial and housing crisis that left consumers reeling in their wake.

The housing market in Florida is clearly recovering from deep and protracted depression, but the road ahead for the Florida housing market is not without pitfalls. The state still has a long journey ahead of it before we can declare that the sector has fully recovered.

If the availability of housing finance does not recover, and the share of cash transactions continues to fall (a normal housing market would see cash transactions making up around 10% of sales), demand for housing will be constrained, and the market’s recovery will weaken as a result.

OUTLOOK FOR FLORIDA 2013-2016

Instead of designing policies and taking action to address the waning recovery in the U.S. economy, Washington DC is seemingly incapable of moving with a sense of purpose and instead looks like a zombie infested no-man’s land. Politicians lumbering from one self-inflicted crisis to another have played a large role in not only failing to bolster economic and job growth, but undermining the weak economy.

There is not a lot of meat on the bones of this economic recovery, but the walking dead of Washington DC are eating away at what flesh is left on the economy’s skeleton.

From the sequester to the government shutdown to the debt ceiling impasse to the calamitous and piecemeal rollout of the Affordable Care Act, policy action and inaction are draining momentum from the economic and labor market recoveries by usurping stimulus and prolonging and intensifying a fog of policy related uncertainty that is as thick and chilling as any you might find in a George Romero movie.

Florida’s economy does not operate in a vacuum. It is impacted by the weakening economic environment unleashed by the undead in DC. The path of Florida’s economic and labor market recovery has been revised downward in this quarter’s forecast, not in response to anything that is happening in the state, but by the state of the national economy which has floundered in the second half of 2013.

The national labor market has added an average of 151,000 jobs per month over the past four months and an average of 178,000 jobs per month for 2013 to date. As was noted in the September 2013 U.S. Forecast, the pace of job creation over the past four months would not get the U.S. labor market back to its full potential until 2021. Given the requirements of the Affordable Care Act and the delay of the employer mandate, the poor performance of the U.S. labor market is insignificant, part due to the mandates of the law and the uncertain effect it will have on insurance premiums. Employers facing the unknown impacts of the law are understandably hesitant to hire workers if they can postpone the decision until they have answers to their questions, answers that may still be well over a year away.

The shutdown and sequester both have shaved off several tenths of a percentage of already tepid real GDP growth and both were completely 100% avoidable. If the federal government could function as a living entity instead of a collection of the undead, we could address the serious short- and long-term fiscal and economic challenges we face. The answers are not esoteric and the solutions not very complex, yet somehow, someway we are politically incapable of implementing them. We raised the debt ceiling and temporarily ended the shutdown, but only for a few months, guaranteeing another fiscal showdown to start the New Year.
FLORIDA SUMMARY

The situation in Washington, DC is looking more and more like a movie that is a hybrid of The Night of the Living Dead and Groundhog Day. Policymakers are behaving like the mindless, reanimated corpses of Mr. Romero's films and until we can break out of this cycle, economic growth both nationally and in Florida will be consumed by the ghoulish plague that has crippled our nation's capital.

GROSS STATE PRODUCT

As discussed above, Florida's economic recovery has been hamstrung by policy action and inaction. Real Gross State Product (RGSP) growth in Florida, the state-level analogue to Real GDP growth, turned barely positive in 2010. The 0.3% year-over-year growth in 2010 remained anemic in 2011 as the economy expanded by only 0.9%. To put that growth in perspective, from 1998-2006 Real GSP grew at an average rate of 4.5%. The peak year for growth during that span was 2005 as the economy grew 6.2%, fueled by the white-hot growth in housing.

2012 and 2013 were and will be an improvement over 2010 and 2011, but they hardly qualify as robust growth. We expect the economy expanded at 2.6% in 2012 and will expand at 2.4% in 2013.

In 2013, rising consumer confidence, a housing market recovery making significant progress, and the ongoing labor market recovery, despite the weight of national policy, will help shore up the foundation for economic growth in the state. These improvements in key areas should finally help generate faster growth in 2014, 2015, and 2016 when Real GSP is expected to grow 2.6%, 3.3%, and 3.0% respectively. This is a better pace of growth, but a far cry from the vigorous growth experienced in the last expansion, and a forecasted path that has been diminished by both policy action and inaction nationally.

Florida lost one hundred billion dollars in home equity wealth, far more than consumers in most other states around the nation. Housing prices have made a strong upward movement from the nadir of the crisis; this price appreciation has helped to repair the damage to Floridians' balance sheets. It will take many more years to recover what was lost as the housing market collapsed. The increase in house prices continues to lift more and more mortgage holders in the state above the surface of the water where for the first time in several years they can take a breath. Getting above water in their mortgage restores mobility that having a home that is underwater took away, and household decisions about spending or saving out of current income can begin to slowly tilt again toward consumption. The recovery in the housing market is a key driver sending consumer confidence in the state to multi-year highs.

Nominal Gross State Product is expected to reach $926.5 billion in 2016, $21.5 billion lower than we forecast in July. The state will cross the trillion-dollar threshold for nominal GSP in 2018. Improving demographic trends, specifically faster rates of domestic in-migration to Florida as Baby Boomers' retirements, delayed for many by the financial and housing crises, get back on track; along with continued international immigration to the state; will help fuel the state's economic growth. In addition to population growth, resurgence in homebuilding, international trade, healthcare, and dividends from the ongoing efforts to diversify the state's economy help broaden the economic base of the state.

PERSONAL INCOME, RETAIL SALES, AND AUTO SALES

Personal income growth in Florida lost some momentum in 2013 as the sequester, payroll tax increase, dividend payments brought forward from 2012 into 2013 to avoid rising dividend tax rates, and ongoing policy uncertainty all weighed on income growth this year. Looking forward, momentum will return in 2014 and persist through the end of 2016. Year-over-year growth slowed in 2012, and again this year, but personal income growth will surge in 2014 with growth of 5.3%, and will continue to expand in 2015 when it is expected to grow 4.9%, and then will maintain this robust pace in 2016 when growth will be 5.4%. Projected growth in all three years has been revised down since our last forecast.

Personal income growth in Florida trailed national rates of growth in 2011 and 2012. But in 2013, the positions flipped, and Florida now is expected to outpace the nation with personal income growth that is an average of 0.3% higher than the national average through 2016. Personal income growth during 2013-2016 will average 3.6% after average growth during the preceding four years of just 1.4%. Personal income will reach nearly $933.8 billion in 2016, a year that will see personal income grow $47.6 billion.

Real disposable income growth increased by 1.2% in 2012. In 2013, disposable income growth will average 0.9% with growth hampered by higher payroll taxes; sequester related spending cuts, the government shutdown, a slowing recovery, and persistent uncertainty. Average growth during 2014-2016 will be a more robust 3.6%. Increasing tax burdens at the federal level will be a drag on disposable income over the forecast horizon and beyond. Addressing the nation's debt cannot be achieved solely with spending cuts, and this problem will ultimately necessitate higher tax burdens for more than just income earners in the highest tax bracket. Higher taxes are also baked into the Affordable Care Act and will erode disposable income in future years.

Financial markets have fully recovered from the financial crisis. The Dow Jones Industrial Average fell to the 6,600 level in March of 2009, but has since climbed
back above the 15,000 level. The bond market has also had a bull run, though that may be reversing itself in the year to come. As a result, financial assets held by U.S. households have values that are nearly $10 trillion higher than pre-crisis levels. Unfortunately, the same cannot be said for home equity wealth held by America’s households, which is still over $3 trillion lower than in 2005, but nonetheless has made substantial progress from the low point of the housing crisis.

The housing market in Florida has not recovered as financial markets have, though housing prices are rising now at a double digit pace. The trillions of dollars in home equity lost nationwide could take many years to recover. In Florida, this negative wealth effect will continue to weigh upon consumer spending through the end of 2016. However, continued home price appreciation will work to ease the balance sheet burden on Florida’s consumers, provided that this price appreciation will be sustained as institutional investors exit Florida’s housing market.

Florida’s persistently high unemployment and even higher underemployment will also continue to weigh on consumer spending in Florida. Generally though, as the labor market improves with private sector job creation accelerating, it will boost consumer confidence and spending. The labor market will become more of a driver of consumer spending than a coconspirator working to repress consumption spending.

Retail sales in Florida grew at 4.7% in 2012, part of that growth was due to higher gasoline prices, but it also reflected the ongoing release of pent-up demand by Florida’s consumers and visitors. As the labor market recovery gains momentum, retail spending will begin to recover across a broad array of sectors in the economy. The average year-over-year growth rate of retail sales will be nearly 4.1% during 2013-2016. In 2013, year-over-year growth should end up at 4.4%.

Although retail sales growth will not reach the levels seen when unabashed spending during the height of the housing and economic boom fueled consumer purchases, Florida’s continued improvement in the economy will further boost sales tax revenues and provide greater budget flexibility in Tallahassee.

When the economy first stabilized and then recovered, consumer’s replacement need and pent-up demand drove automobile sales higher. This replacement demand is reflected in national sales data as confidence in the stability of the economy, despite the slow pace of the recovery, and has fueled consumer’s light vehicle demand. Vehicle registration growth in Florida will be healthy during 2013-2016, averaging around 6.6%, though it will decelerate significantly from double-digit growth in 2012 and 2013. In 2016, Florida registrations will reach 1.31 million, representing an increase of over 600,000 registrations from the 2009 bottom, but still below the peak level of registrations during the height of the housing boom of 1.45 million in 2005.

**EMPLOYMENT**

In 2014 Governor Scott will come Face-to-face with the Ghost of his Campaign Jobs Promise.

**WILL IT BE CASPER OR THE BLAIR WITCH?**

In 2010 Governor Rick Scott was elected on a campaign platform consisting of seven steps that he pledged would lead to the creation of 700,000 jobs in seven years. There was some confusion about whether or not those 700,000 jobs would be in addition to the projected job growth expected to happen in Florida irrespective of the Governor’s seven-step plan. Early on the governor made an impromptu statement to the media that the 700,000 jobs would be in addition to the expected growth, but subsequently refined the goal to 700,000 payroll jobs, period.

The refined goal is something that can be easily gauged by looking at the overall change in payroll employment in Florida. The earlier goal is nearly impossible to assess. First, whose forecast should be used as the baseline, no seven-step projection? State economics forecasts put out by Tallahassee? Are those projections truly made without any consideration to economic policy making them “clean” and thus an appropriate measuring stick? Every economic forecaster, in making their forecasts, must also forecast the path that economic policy, at both the state and national level, will take over the forecast horizon. Second, even if the forecasts were unainted by any policy assumptions, were those 2010 forecasts 100% accurate? On both the policy and accuracy questions we can safely state the answer is no and thus the only measurable litmus test is the actual number of payroll jobs created.

So how is the governor’s jobs promise holding up at this point in the seven-year time frame? In January 2010, Florida payroll employment was 7,143,900 and in August 2013 payroll employment was 7,543,700 for a gain in payroll employment of 399,800 jobs. The governor has reached 57.1% of the 700,000 job target 52.4% through
his seven-year plan. By the time the 2014 election comes around, we project that payroll employment will have expanded by 600,000 jobs and by the middle of 2015 the 700,000 jobs target will be hit, 18 months shy of the seven year deadline. By January 2017 Florida will have added over 900,000 payroll jobs.

Oftentimes, politicians are haunted by their campaign promises, but when it comes to Governor Scott's jobs promise he will be facing a friendly ghost, the friendliest ghost you know.

The national economy has slowed significantly amid the government shutdown, the debt ceiling limit, and high levels of policy-related uncertainty that, in the face of the troubled beginnings of the Affordable Care Act, appear to be rising, are creating an environment in which Florida's employment growth will likely lose momentum over the next couple years. In 2012, job growth was 1.8%. In 2013, the labor market will continue its expansion with job growth of 2.6%. Payroll job growth will reach 2.2% in 2014 and 2.0% in 2015 before settling at 1.9% in 2016. Florida will continue to outpace national job growth over the entire forecast horizon.

The Construction sector, after five years of job losses starting in 2007 occurring at an average annual rate of -12.9%, began to grow again in 2012 – a long awaited participation in the labor market's recovery. Job growth will build momentum over the next couple years before hitting double digits in 2015 and 2016.

Construction job growth is expected to surge to 3.6% in 2013, 8.2% in 2014, 13.8% in 2015, and 11.2% in 2016. The double-digit pace of employment growth will at first glance appear large, but remember these growth rates are calculated from a dramatically lower base of employment in the sector. In 2016, employment in this sector should be back at a number of jobs near December 2006 levels.

The Professional and Business Services sector will be the state's second fastest growing sector on average through 2016, behind Construction. However, growth rates in the Professional and Business Services sector are not being calculated from such a depleted base. Job growth in this sector is expected to be healthy, averaging 3.4% during 2013-2016. Job gains here in the first three years of Florida's recovery averaged 2.4%, but the next four years will see improved growth. After three years of more modest growth, job growth will accelerate and reach 4.4% in 2014 and 3.8% in 2015, before easing further to 2.4% in 2016. This sector will recover quickly and will get back to pre-recession peak levels of employment by the end of 2014.

The Information sector continued to lose jobs at the start of 2013. Ongoing structural changes in the industry are a disruptive force in this sector, as technology and the delivery of information rapidly evolve. The production of content is becoming more widely dispersed. The traditional print news industry is under continued pressure, but other sources of growth within this sector, such as software development and data processing, will begin to compensate for the loss of jobs in legacy industries.

Mild job growth should return to the Information sector year-over-year in 2013, the first year of job growth in this sector in seven years. After 0.8% growth in 2013, job growth will further rise to 2.3% in 2016 and average 1.3% during 2013-2016.

The Education and Health Services sector has consistently grown throughout the recession into the recovery and is expected to expand through the end of 2016 (and likely well beyond). During 2013-2016, employment in this sector is expected to expand at an average rate of 2.1%. School budgets will begin to lift employment growth in the education side of the sector as school districts enjoy higher revenues as a result of rising housing prices and the impact it will have upon the property tax based revenue that funds K-12 school districts. The housing sector has enjoyed prices rising at a double-digit pace, but there are lags between the recovery in housing values and an improvement of the bottom line of school budgets. When the rise in house prices filters through the budgetary environment in which the state's school systems operate will improve.

There is growing uncertainty regarding the Affordable Care Act's impact on healthcare in the nation. The technical failures of the healthcare exchanges are a potentially devastating development to the rollout of the law. These exchanges are a cornerstone of implementing federal healthcare reform. It is not clear that the system will ultimately be viable and there are already a large number of problems that appear as a harbinger of more to come. However, with some as yet unknown degree of expanded coverage and the aging of our already older population, the demand for health services in Florida should remain strong. This demand will continue to drive job growth in the Health and Education sector.

Manufacturing employment expanded in Florida at an average rate of 1.4% in 2012, and in 2013 growth will soothe as the domestic and global economic environments have weakened. The weakening of expansions in emerging economies and ongoing struggles in Europe will drive job growth temporarily negative in the manufacturing sector as exports will waver and the sector contracts at -0.7%.

After stumbling in 2013, we are expecting to see job growth of 0.9% in manufacturing for the full year in 2014, followed by another tepid year of job growth in 2015, when manufacturing employment will expand at a rate of 0.8%. Manufacturing is expected to continue to limp along in 2016 when job growth is expected to be just 0.1%.
The State & Local Government sector is still constrained by revenues streams that are starting to improve but have been diminished by the recession and housing crisis. This budgetary tightness runs from the state level down to counties and small cities. Consequently job losses will persist in the State and Local Government sector through 2013 when growth will be -0.3%. From that point, growth will turn weakly positive and average 0.4% during 2014-2016. As Florida’s economy continues to expand, the need for state and local government services will grow as well, and employment growth will be part of the solution to the expanding demands of a growing economy. Governments will remain cautious in hiring, keeping a meager pace of job growth in place through the next several years.

Federal Government employment growth in the near-term may be bolstered by frantic hiring to address the problems associated with the Affordable Care Act. The first year of sequester spending cuts and the government shutdown and debt ceiling battle have doubled the pace of job losses in 2013 from 2012. We are still awaiting a long-term solution to our federal deficit and debt problems; ultimately cuts in federal spending will be necessary. Job losses are expected to reappear in 2016 and beyond as the U.S. begins to come to grips with these massive budget deficits and a ballooning national debt. Federal Government employment in Florida will contract at an average rate of -0.5% during 2013-2016.

UNEMPLOYMENT

The unemployment rate in Florida remains elevated, and stands at 7.0% as of August 2013. It has come down substantially from its peak and, after many years above the national rate of unemployment, Florida’s unemployment rate is again lower than the nation as a whole. At first glance, this appears to be good news for the labor market in the state. However, a deeper look at the data reveals some problems in this cursory assessment. Part of the problem is that these declines in the unemployment rate have been in a large part driven by a shrinking labor force participation rate that in August 2013 stood at 59.8%. This is down from 60.3% in May and below the national participation rate that stood at 63.2% in September 2013. The May national participation rate was the lowest since August 1978. Lower headline (U-3) unemployment rates can be deceiving if you don’t understand the underlying factors that are driving the decline.

Robust economic growth is necessary to quickly bring down the unemployment rate, and labor force shrinkage notwithstanding, we have not as yet experienced the type of growth that can do more than reduce the unemployment rate gradually. The unemployment rate in Florida stood at 7.0% in August 2013, a 4.4 point decline from the peak level of unemployment in 2010.

Stronger, but not necessarily robust, economic growth will finally arrive in Florida in 2014. The labor market will need stronger growth to continue to drive meaningful declines in the rate of unemployment that to date have been by and large driven by a shrinking labor force participation rate. Faster economic growth, though, will be faced with a headwind of a rising labor force participation rate that will make progress in reducing the unemployment rate a more challenging task. We expect the labor force to grow faster during 2014-2016 and this will have a net result of more modest declines in unemployment rates in Florida during these years.

The unemployment rate is expected to continue a gradual, drawn-out decline that will push it down to 6.4% by the end of 2016.

This problem of underemployment and marginally attached workers—those who are working part-time but not by their choice, and those who are neither working nor looking for a job, but indicate that they want and are available for a job, and have looked for work sometime in the past twelve months—remains significant. When adding these workers to the top-level unemployment figure, this broader measure of unemployment, known as U-6, paints an even grimmer picture of labor markets, and it averaged 15.1% for Q3 2012 through Q2 2013 in Florida, according to the Bureau of Labor Statistics. This is a more dire picture of the state of the labor market in Florida than reflected in the current headline unemployment rate of 7.0%.

Underemployment nationally and in the state will bear watching in the years to come. There have been indications that companies may rely more upon part-time workers to fill their labor needs to avoid the costs of providing healthcare or the penalties for not doing so for full-time employees, particularly if and when the employer mandate of the Affordable Care Act is enforced.
Sun Sentinel

Florida planning U.S. Bicycle Route for long-distance bike travel

By Angel Streeter, Sun Sentinel

1:21 AM EST, November 10, 2013

Traveling long distances isn't just for motorized vehicles. A bike, apparently, will do just fine for some.

To make sure bicyclists can make their way across the entire state of Florida, the Florida Department of Transportation has embarked on establishing a bike route following the outline of U.S. 1 that runs from Jacksonville to Key West.

For 541 miles, cyclists would be able to meander through scenic and cultural aspects of the corridor, taking in parts of West Palm Beach, Delray Beach, Fort Lauderdale and Miami.

The route will be part of the United States Bicycle Route system, a national network of connected bike routes similar to the interstate highway system.

US BR 1 is one of four routes FDOT plans to establish that eventually will connect to future routes in Georgia and Alabama. Another route, US BR 90 also is currently in the works and would stretch from Pensacola to St. Augustine following U.S. 90.

U.S. bike routes, or at least the concept of them, have been around since 1979, with the first U.S. bike routes created in 1982 — US BR 1 in Virginia and North Carolina and US BR 76 in Virginia, Kentucky and Illinois.

But after that, the idea stagnated. No other national bike routes were created for nearly 30 years.

"We were all busy building roads and highways," said David Lee, a FDOT administrator overseeing the U.S. bike route system in Florida. "Usually when you ride a bike, you don't think about traveling across a state."

But the last few years has seen a resurgence in the U.S bike route system. That came after state transportation officials and bike advocates created an interstate bicycle map, outlining a vision of where routes could go.

That's how the U.S. highway and interstate systems started — with maps, Lee pointed out. Now, nine states have U.S. bike routes, and about 40 states are in the process of implementing them.

The U.S. 1 bike route likely will be a mix of low-traffic roads and some busy urban sections. U.S. 1 mainly acts as a baseline for the proposed route, which will diverge from the road to county- or city-maintained streets and trails that can better accommodate cyclists.

So parts of State Road A1A could be part of the route. So could the East Coast Greenway, a mainly off-road
system of trails stretching from Maine to Key West.

U.S. bike routes must be approved by the American Association of State Highway and Transportation Officials, which also designates U.S. highways and interstates.

The criteria FDOT established for its routes also requires them to be close to major attractions, destinations and public transportation. And every 40 to 60 miles on the route should have services and amenities such as places to get food, camping or hotels.

FDOT will have to work with local governments and groups to not only figure out the best route but also to make sure they're fine with a U.S. bike route system running through their communities.

Bret Baronak, Palm Beach County's bicycle and pedestrian coordinator, said FDOT recently has been installing quite a few bike lanes on U.S. 1.

"Anything that results in roads being upgraded to better accommodate bikes, I'm all for it," he said.

Communities should embrace the U.S. bike routes since they will attract a growing group of cyclists embracing bike tourism, said Virginia Sullivan, with Adventure Cycling Association an advocacy group helping to establish the bike routes.

"They bring people and money to the local communities," she said.

She compared them to interstate highways like Interstate 95. The highways are used by both commuters and long-distance travelers. The U.S. bike routes also would be used by local residents for short trips or out-of-town cyclists on a long distance trip.

But a big difference is the cyclists would stick around longer, taking a couple of days to get through a county, and pour money into the local economy, Sullivan said.

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Texas high-speed train idea mirrors All Aboard's Florida plan

Oscar Pedro Musibay  
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A 90-minute trip from Dallas-Fort Worth to Houston is the vision Texas Central Railway Co. has for its proposed private train.

Texas Central Railway Co., with one of Japan's high-speed rail operators as main investor, hopes to break ground on the project in 2014 and start running trains within a decade, according to Robert Eckels, the railway's president and former Harris County judge and state legislator. He talked to Matt Joyce of the Dallas Business Journal in a May 11 story.

Several questions have been left unanswered so far, including the location of stations.

But if Florida is any indication, the project in Texas could cost more than $1 billion. All Aboard Florida's plan to connect Miami to Orlando would cost about $1.5 billion for the train alone, and that's because All Aboard Florida-parent FECI already owns most of the rail its running on. The overall cost, including planned commercial development on land near the stations, totals out at about $2.4 billion.

RELATED CONTENT: Will the numbers in All Aboard's financial plan add up?

It's good to see more private companies in addition to Coral Gables-based All Aboard Florida, seeking to build high-speed passenger trains between major cities.

All Aboard Florida is hoping its plan to connect Miami to Orlando will soon get underway. The company recently won approval for its station at Orlando Airport and will soon announce its Fort Lauderdale location.

As part of its commercial development strategy, it is planning to develop offices and other commercial in Miami’s Overtown neighborhood, where it will locate its headquarters. The Overtown site is next to the land in Miami where it is planning its Grand Central-like passenger rail station.
To: Fred Wise  
Executive Director, Florida Rail Enterprise

From: Vinay Mudholkar  
Senior Vice President – Infrastructure, All Aboard Florida

Subject: Process for Conducting Existing Highway Grade Crossing Analysis and Diagnostic

Date: November 11, 2013

This memo serves to document the process that All Aboard Florida – Operations LLC (AAF) proposes to undertake regarding the treatment of existing highway grade crossings affecting the rail right-of-way (FEC Corridor) currently operated by Florida East Coast Railway, L.L.C. (FECR) as AAF’s proposed intra-state passenger rail service (Project) is introduced. This process shall be completed with the participation of FECR, which operates freight rail service within the FEC Corridor, to identify the infrastructure necessary to complete the initial installation of crossing improvements that are required to commence service of the Project in compliance with currently applicable laws regarding safety at public crossings.

For example, the Project shall conform to the applicable safety requirements of the Federal Railroad Administration (FRA), including the applicable provisions of 49 CFR Part 234.1 for each crossing¹ and this study shall be conducted to determine whether and to what extent work must be completed to satisfy those requirements. Specifically, the study will undergo a two-phase approach: (1) Assessment/Evaluation Phase and (2) Diagnostic Phase. Importantly, these two phases to be undertaken by AAF and FECR will be limited to the review of safety improvements necessary to commence service of the Project in compliance with applicable laws regarding safety at public crossings and shall not encompass any other improvements related to crossings, such as improvements required or desired by others in connection with the establishment of quiet zones.

TWO-PHASE PROCESS

Assessment/Evaluation Phase – Now through December

First, AAF’s and FECR’s railroad designers (Designer) will perform a site visit to assess each crossing. Representatives of AAF and FECR shall take part in this assessment.

This assessment will consider existing railroad (RR) track, RR signals, RR-related traffic signals and local utilities (overhead and underground). Each such assessment shall include a determination of the existing condition of all crossing warning devices, wayside apparatus, layout and site conditions. The Designer will then determine what improvements would be necessary to comply with currently applicable laws regarding safety, taking into consideration whether and to what extent the Project may:

• Re-use existing crossing warning devices or wayside apparatus;

¹ This part imposes maintenance, inspection, and testing standards for highway-rail grade crossing warning systems.
- Partially replace existing facilities; and
- Interconnect with adjacent traffic signals.

From this site visit, the Designer will develop a preliminary layout plan (Plan) to be utilized as part of the Diagnostic Phase.

**Diagnostic Phase – November through early 2014**

Diagnostics will be performed for each crossing. This phase is split between Office and Field assessments.

**Diagnostic Phase – Office**

First, the Plan developed during the Assessment/Evaluation Phase shall be distributed to the “Diagnostic Team” for each crossing, which shall include representatives from FECR, AAF, FDOT, the Federal Railroad Administration (FRA) and, as applicable, the public entity (city or county) with authority over the crossing. When the Plan is distributed, AAF and FECR shall ask the personnel who have decision making authority for each such entity to attend the office review to be organized for each crossing, with the intent to limit the size of the Diagnostic Team at such office review to essential personnel. This shall include representatives from FECR, FDOT, FRA and representatives from the local entities with authority over the crossing, such as the applicable City/County/Town engineer and traffic engineer, as well as emergency responders, as required. The individual Diagnostic Team members will each review the Plan from their perspective. Following the distribution of the Plan and identification of the Diagnostic Team to participate in the office review, a meeting will be scheduled with each municipality or county as appropriate, and will include all Diagnostic Team members. The meeting will initiate in an office environment to review each Plan for each crossing individually with each representative offering review comments and recommendations, as well as taking a “systemwide” look at all crossings within that municipality or jurisdiction. AAF and FECR representatives will coordinate and lead this meeting.

**Diagnostic Phase – Field**

AAF and FECR will then coordinate Field Diagnostics for all crossings, as needed. AAF and FECR are open to visiting any crossing as deemed necessary by the Diagnostic Teams. Following the completion of the necessary Field Diagnostics, the findings of the Diagnostic Team shall be confirmed and incorporated into the final layout plan (Final Plan). This Final Plan will be distributed to the Diagnostic Team for record keeping purposes. AAF will then use this Final Plan to develop the construction drawings that will be bid for construction.

**SCHEDULE OF EVENTS**

Based on the current schedule, AAF and FECR will be conducting its Assessment/Evaluation Phase through December. The Plans will be developed upon completion of these assessments, with anticipation of initiating the Diagnostic Phase in November and continuing that into early 2014. Construction at crossings is anticipated to begin in the Summer/Fall 2014.

**AAF CONTACT PERSON**
If you have any questions or need further information, please contact AAF’s Operations Planner, Michael Lefevre. He can be reached by phone or email, 305-520-2111 or Michael.Lefevre@allaboardflorida.com. To streamline the process, we ask that the designated staff member responsible for overseeing this effort contact Michael so that we may update our database and be ready to schedule the meetings and site visits.
FOR IMMEDIATE RELEASE:

National League of Cities Elects 2014 Leadership and Board of Directors

November 16, 2013

Seattle, Wash. - The National League of Cities (NLC) today named its 2014 leadership and board of directors at the annual Congress of Cities and Exposition in Seattle, Wash. The organization elected Mayor Chris Coleman of Saint Paul, Minn. to serve as NLC's 2014 president, Mayor Ralph Becker of Salt Lake City, Utah as first vice president and Mayor Melodee Colbert Kean of Joplin, Mo. as second vice president.

All officers are selected by a 15-member nominating committee and are elected by NLC's membership to serve a one-year term. NLC's 2013 president, Mayor Marie Lopez Rogers of Avondale, Ariz., will serve as the organization's immediate past president.

NLC also elected new members of the board of directors to serve a two-year term:

- Tammell Atkins, mayor pro tem, Dallas, Texas
- Ricki Barlow, councilman, Las Vegas, Nev.
- Joe Buscaino, councilman, Los Angeles, Calif.
- Mary Cameron, councilmember, Clemson, N.C.
- Sam Ferreri, mayor, Greenacres, Fla.
- Ronald Green, city controller, Houston, Texas
- Elizabeth Hurst, councilwoman, Fairburn, Ga.
- Van Johnson, mayor pro tem, Savannah, Ga.
- Kevin Kramer, councilman, Louisville, Ky.
- Dot LaMarche, vice mayor, Farragut, Tenn.
- Pat Lockwood, councilwoman, Fenton, Mich.
- Jesse Matthews, councilmember, Bessemer, Ala.
- Gene McGee, mayor, Ridgeland, Texas
- Joe Moore, alderman, Chicago, Ill.
- David Sander, councilmember, Rancho Cordova, Calif.
- Mark Stodola, mayor, Little Rock, Ark.
- Betty Taylor, city councilor, Eugene, Ore.
- Priscilla Tyson, councilwoman, Columbus, Ohio
- Scott Hancock, Maryland Municipal League
- Alan Kemp, Iowa League of Cities
- Christopher Lockwood, Maine Municipal, Maine Municipal Association
- Sam Mamet, Colorado Municipal League
- Ken Strobeck, League of Arizona Cities and Towns

The National League of Cities is dedicated to helping city leaders build better communities. NLC is a resource and advocate for 19,000 cities, towns and villages, representing more than 218 million Americans.
Unemployment Summary - Treasure Coast Region
November 22, 2013

- This unemployment summary is derived from statistical reports - *Overview of the Workforce Solutions Region* (Indian River, Martin, Okeechobee and St. Lucie counties) and *Overview of Workforce Alliance Region* (Palm Beach County) prepared by the two workforce development boards in the Treasure Coast Region. Their respective reports follow this regional summary.

- The unemployment rate for the Treasure Coast Region was 7.1 percent in October 2013, down 1.7 percentage points from the October 2012 rate of 8.8 percent. The Region’s unemployment rate was 1.1 percentage points higher than the state’s unemployment rate of 6.6 percent and 0.1 percentage points higher than the national unemployment rate of 7.0 percent. Out of a labor force of 892,575, there were 63,481 unemployed Treasure Coast Region residents.

- The Treasure Coast Region contains three metropolitan statistical areas (MSAs), the Port St. Lucie MSA (Martin and St. Lucie counties), the Sebastian-Vero Beach MSA (Indian River County and the West Palm Beach – Boca Raton-Boynton Beach MSA (Palm Beach County). In October 2013, nonagricultural employment in the combined metropolitan areas of the Region was 708,700, an increase of 21,100 jobs over the previous year.

- In the combined metropolitan areas, job gains were primarily in the trade, transportation and utilities industry (+8,200 jobs), the retail trade industry (+7,600), and the professional and business services industry (+5,200).

<table>
<thead>
<tr>
<th>Geographic Area</th>
<th>October 2013</th>
<th>September 2013</th>
<th>October 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indian River</td>
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<td>Palm Beach</td>
<td>6.7</td>
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<td>8.4</td>
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<td>St. Lucie</td>
<td>8.8</td>
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<td>10.5</td>
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<td>7.6</td>
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<td>Florida</td>
<td>6.6</td>
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<td>8.1</td>
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<tr>
<td>United States</td>
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<td>7.5</td>
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</tbody>
</table>

Source: Florida Department of Economic Opportunity, Local Area Unemployment Statistics

*Not seasonally adjusted.

- Industries that lost jobs over the year were manufacturing (-1,200 jobs) and construction (-600 jobs).
Overview of the Workforce Solutions Region
Not Seasonally Adjusted
November 22, 2013

- The unemployment rate in the Workforce Solutions region (Indian River, Martin, Okeechobee, and St. Lucie counties) was 8.1 percent in October 2013. This is 1.9 percentage points below the region’s rate a year ago, but 1.5 percentage points above the state rate of 6.6 percent. From a labor force of 277,320 there were 22,526 unemployed residents in the region.

- Unemployment rates in the counties that make up the Workforce Solutions region were: 8.8 percent in St. Lucie County; 8.2 percent in Okeechobee County; 8.0 percent in Indian River County; and 6.9 percent in Martin County.

- The Workforce Solutions region contains two metropolitan statistical areas (MSAs), the Port St. Lucie MSA (Martin and St. Lucie counties) and the Sebastian-Vero Beach MSA (Indian River County). Okeechobee County is not included in an MSA. In October 2013, nonagricultural employment in the combined Workforce Solutions metro areas was 177,000, an increase of 8,500 jobs over the previous year.

- In the combined Workforce Solutions metro area, nine industries gained jobs over the year: trade, transportation, and utilities (+3,100 jobs); education and health services (+1,500 jobs); leisure and hospitality (+1,300 jobs); professional and business services (+1,100 jobs); mining, logging, and construction (+500 jobs); government (+400 jobs); financial activities (+300 jobs); other services (+200 jobs); and information (+100 jobs). Manufacturing remained unchanged over the year.

- The majority of the nonagricultural employment in the workforce region was in the Port St. Lucie metro area. This metro area accounted for 129,300 jobs in October 2013, an increase of 5,500 jobs from October 2012 (+4.4 percent). The state increased by 181,700 jobs in the same period (+2.4 percent).

- The industries gaining jobs in the Port St. Lucie metro area over the year included: trade, transportation, and utilities (+2,000 jobs); education and health services and leisure and hospitality (+900 jobs each); professional and business services (+700 jobs); mining, logging, and construction and government (+400 jobs each); and financial activities and other services (+100 jobs each).

- Information was unchanged over the year.

- Nonagricultural employment was 47,700 in the Sebastian-Vero Beach metro area in October 2013, an increase of 3,000 jobs from the previous year (+6.7 percent). The state had a 2.4 percent increase in the number of jobs over the same period.

- Eight industries gained jobs over the year including: trade, transportation, and utilities (+1,100 jobs); education and health services (+600 jobs); professional and business services and leisure and hospitality (+400 jobs each); financial activities (+200 jobs); and mining, logging, and construction; information; and other services (+100 jobs each).

- Manufacturing and government were unchanged over the year.

- The Sebastian-Vero Beach metro area (+6.7 percent) had the second highest over the year employment growth rate of all of the metro areas in Florida, trailing only the Naples-Marco Island metro area (+7.6 percent).

Note: All data are subject to revision.
<table>
<thead>
<tr>
<th>Unemployment Rates (%)</th>
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<th>Sep-11</th>
<th>Oct-12</th>
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<td>6.9</td>
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<table>
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<td>205,400</td>
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<table>
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<th>Population</th>
<th>2013</th>
<th>2012</th>
<th>change</th>
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<tr>
<td>Workforce Solutions Region</td>
<td>608,576</td>
<td>606,684</td>
<td>1,892</td>
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<tr>
<td>Indian River County</td>
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<td>189,444</td>
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<tr>
<td>Martin County</td>
<td>148,077</td>
<td>147,714</td>
<td>363</td>
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<tr>
<td>Okeechobee County</td>
<td>93,762</td>
<td>93,503</td>
<td>261</td>
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<tr>
<td>St. Lucie County</td>
<td>281,151</td>
<td>280,359</td>
<td>792</td>
</tr>
<tr>
<td>Florida</td>
<td>19,259,543</td>
<td>19,074,454</td>
<td>1,879</td>
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<table>
<thead>
<tr>
<th>Average Annual Wage</th>
<th>2013</th>
<th>2012</th>
<th>change</th>
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<td>Workforce Solutions Region</td>
<td>$31,417</td>
<td>$30,912</td>
<td>505</td>
</tr>
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<td>Martin County</td>
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<td>23</td>
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<td>Okeechobee County</td>
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<td>St. Lucie County</td>
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</tr>
<tr>
<td>Florida</td>
<td>$38,454</td>
<td>$38,412</td>
<td>42</td>
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</table>

Note: All data are subject to revision.
Overview of Workforce Alliance Region
Not Seasonally Adjusted
November 22, 2013

- The unemployment rate in Palm Beach County was 5.7 percent in October 2013, down 1.7 percentage points from the October 2012 rate of 8.4 percent. Palm Beach County’s unemployment rate was 0.1 percentage point higher than the state’s unemployment rate of 6.6 percent and 0.3 percentage point lower than the national unemployment rate of 7.0 percent. Out of a labor force of 633,294, there were 42,439 unemployed Palm Beach County residents.

- In October 2013, nonagricultural employment in the West Palm Beach-Boca Raton-Boynton Beach Metropolitan Division was 531,700, up 2.4 percent over the year. Statewide employment also increased 2.4 percent over the same time period.

- The West Palm Beach-Boca Raton-Boynton Beach Metropolitan Division gained 12,600 nonagricultural jobs over the year. Job gains were primarily in the trade, transportation, and utilities industry (+5,100 jobs) and the professional and business services industry (+4,100 jobs). Other industries gaining jobs were education and health services (+2,100 jobs); leisure and hospitality (+1,800 jobs); government (+1,100 jobs); and other services (+500 jobs).

- Industries that lost jobs over the year were manufacturing (-1,200 jobs); construction (-600 jobs); financial activities (-200 jobs); and information (-100 jobs).

- Employment growth in the West Palm Beach-Boca Raton-Boynton Beach Metropolitan Division was strongest in the trade, transportation, and utilities industry, which increased by 5.1 percent over the year.

- The West Palm Beach-Boca Raton-Boynton Beach Metropolitan Division was among the top five metro areas in the state for total nonagricultural job growth in October 2013, gaining 12,600 jobs over the year. It was also among the top metro areas for gains over the year in trade, transportation, and utilities; professional and business services; education and health services; government; and other services.

| Unemployment Rate (%
<table>
<thead>
<tr>
<th>(not seasonally adjusted)</th>
<th>Oct-13</th>
<th>Sep-13</th>
<th>Oct-12</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workforce Alliance Region (Palm Beach County)</td>
<td>6.7</td>
<td>7.1</td>
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<td>Florida</td>
<td>6.6</td>
<td>6.9</td>
<td>8.1</td>
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<tr>
<td>United States</td>
<td>7.0</td>
<td>7.0</td>
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<thead>
<tr>
<th>Nonagricultural Employment by Industry</th>
<th>West Palm Beach-Boca Raton-Boynton Beach Metropolitan Division</th>
<th>Florida</th>
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<tbody>
<tr>
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<td>Oct-13</td>
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</tr>
<tr>
<td>Total Employment</td>
<td>531,700</td>
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<td>NA</td>
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<td>Construction</td>
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<td>24,600</td>
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<tr>
<td>Manufacturing</td>
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<td>Information</td>
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<td>9,100</td>
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<td>Financial Activities</td>
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<td>Professional and Business Services</td>
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<td>Education and Health Services</td>
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<td>Leisure and Hospitality</td>
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<td>Other Services</td>
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<thead>
<tr>
<th>Population</th>
<th>2013</th>
<th>2012</th>
<th>change</th>
<th>percent change</th>
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<tr>
<td>Workforce Alliance Region (Palm Beach County)</td>
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<tr>
<td>Florida</td>
<td>19,259,543</td>
<td>19,074,434</td>
<td>185,109</td>
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<table>
<thead>
<tr>
<th>Average Annual Wage</th>
<th>2012</th>
<th>2011</th>
<th>change</th>
<th>percent change</th>
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<tr>
<td>Workforce Alliance Region (Palm Beach County)</td>
<td>47,777</td>
<td>46,332</td>
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<td>45,210</td>
<td>43,212</td>
<td>998</td>
<td>2.3%</td>
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</tbody>
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Note: All data are subject to revision. NA = Data not available.
Source: Florida Department of Economic Opportunity, Bureau of Labor Market Statistics