

SRPP Economic Development Table of Contents

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Chapter II: Economic Development

I. EXISTING REQUIREMENTS OF OTHER PLANNING OR REGULATORY PROGRAMS

A. Planning and Regulatory Programs

Economic development projects that will result in the construction of facilities are subject to local government comprehensive plans and land development regulations as well as the requirements of other agencies having regulatory responsibility over the project such as water management districts, the Florida Department of Environmental Protection and sometimes the U.S. Army Corps of Engineers. Each member county of the Region has in place an adopted local government comprehensive plan that spells out goals, objectives and policies for land use as mandated by state law. Furthermore, the local government plans are the basis for development regulations that govern the location and nature of development including economic development in each jurisdiction.

Economic development planning is largely optional in Florida and in the Withlacoochee Region. Recent changes to state regulations governing local government comprehensive plans gave the counties the option to include an economic development element. In 1994, Citrus County prepared such an optional Economic Development Element.

Economic development planning is often required of agencies and jurisdictions participating in various state and federal economic development assistance programs such as 301(b) Planning Grants from the U.S. Economic Development Administration or the Job Training Partnership Act. These programs are briefly discussed in this section, as are local economic development agencies which have taken various forms in the Region ranging from county economic development departments to private sector economic development councils to chambers of commerce.

B. Economic Development District

An entity of the Withlacoochee Regional Planning Council, the Economic Development District designation was granted in April, 1995 by the U.S. Economic Development Administration. An Economic Development District is a designation available only to regional entities that have completed the prescribed Overall Economic Development Planning process and prepared an Overall Economic Development Plan to guide the activities of Economic Development District. The District offers special considerations for obtaining grants from the Economic Development Administration to fund economic development projects and serves as a federally funded vehicle for addressing economic development issues and fostering a regional approach to economic development planning. A listing of EDA grants awarded in recent years within the Withlacoochee Region appears in Table 2-86 in Appendix B.

Note: The continued existence of the Economic Development District is contingent upon receipt of federal funding.

C. Private Industry Councils

Private industry councils also provide economic development planning in the form of Job Training Partnership Act (JTPA) and other jobs-related programs for the Region. The Withlacoochee Workforce Development Authority (formerly the Withlacoochee Private Industry Council) serves Levy, Marion and Sumter Counties; the recently established Citrus-Hernando Private Industry Council serves Citrus and Hernando Counties; both are required to prepare employment training plans. Furthermore, the Withlacoochee Workforce Development Authority in 1994 became involved in a program to establish a Community Development Corporation in economically disadvantaged West Ocala to foster economic development.

D. Local Economic Development Agencies

In the Withlacoochee Region, varying degrees of local economic development planning have occurred through the local chambers of commerce and economic development councils. As of January, 1994, there were 14 chambers of commerce in the Region, the largest being the Ocala/Marion County Chamber of Commerce. Three chambers of commerce in Hernando County recently merged to form a single organization. Generally speaking, the small local chambers in the Region do not have the funding or staff to plan and implement economic development programs.

There are private economic development councils and/or public industrial development authorities in every county in the Region. The industrial development authorities have the capability to issue Industrial Revenue Bonds (IRB's). The largest and most successful economic development council in the Region is the Economic Development Council of Marion County which has been very effective in recruiting new industries for Marion County. Both the City of Ocala and Marion County provide financial support to the Economic Development Council. The Sumter County Development Council was active in the establishment of the Sumter County Job Service Employer Council in association with the Job Service of Florida. The Levy County Commission in summer, 1994, authorized the establishment of a tourism agency in conjunction with the Levy County Development Authority. The Levy County Development Authority is affiliated with the Levy County Economic Development Council and Community Development Corporation.

The Economic Development Association of Citrus County evolved from predecessor organizations and is involved in marketing the county to potential industries, recruiting new businesses to locate in the county and working to retain existing businesses. In July, 1994, the Manufacturer's Association of Hernando County was formed to promote manufacturing in the county and provide a forum for strategic planning and discussion of issues of common interest.

Citrus and Hernando Counties have economic development efforts as a part of county government. At the beginning of 1994, Citrus County abolished its Office of Economic Development and hired a business and tourism facilitator to serve as a facilitator for providing socioeconomic information to the private sector and expedite projects through the review process. Hernando County has been more pro-active with its economic development activities. Its program includes a set of recently adopted economic development strategies formulated in partnership with the private sector. Hernando County has also been active in the Tampa Bay Capital Initiative, a push to plan and finance needed infrastructure improvements to support economic development. It is not unusual for member counties of one region to develop ties and interdependencies with counties from neighboring regions; indeed, in recent years greater links between Marion and Alachua Counties have been urged by various business and governmental leaders. The City of Ocala has a downtown redevelopment organization that pursues various projects to revitalize the city's central business district. Another organization involved in downtown revitalization in Ocala is the Brick City Partnership (Ocala Star Banner: 3/22/95).

II. TRENDS AND CONDITIONS FOR ECONOMIC DEVELOPMENT

NOTE: Tables referenced in this chapter are located in Appendix B.

A. An Economic History of the Withlacoochee Region

1. 1850--1950

In the century from 1850 to 1950, the Region's economy was dominated by the Agriculture, Forestry and Fishing sector rather than the Retail Trade and Services sectors as today. The early agricultural industry included the production of cattle, sugarcane, cotton and tobacco.

Subsistence farming was a vital activity; small farmers raised vegetables, chickens and hogs for food; hunting game was also an important source of food. The Retail Trade sector was born originally as general stores to provide staple items that could not be grown or produced locally; the Services sector initially provided rudimentary medical, legal and educational services.

Then, as now, logging was important. Even as late as 1950, it drove the regional manufacturing base (logging is classified as a manufacturing activity). Presently, logging and the manufacture of wood products remain vital natural resource-based industries in the Region. In 1990, the Lumber and Wood Products sub-sector of Manufacturing accounted for more business establishments (76) than any other Manufacturing sub-sector of the Region's economy.

The production of citrus was important in the period after the Civil War (c. 1870--1895) until a series of devastating freezes in the winter of 1894-95 virtually wiped out the Region's citrus groves causing many growers to shift their operations farther south or pursue other activities such as vegetable farming which flourished after the turn of the century until most truck farming shifted to south Florida after about 1930. In the 1920's, Sumter County was a leading producer of cabbage, cucumbers and cantaloupes and reportedly had the largest string bean canning plant in the United States (Looking Back, Sumter County: 3).

Growth centers in the Region shifted over the years. The first was Cedar Key, the western terminus of the Florida Railroad; it was an important port and manufacturing center for pencils which drew upon the locale's cedar forests. It was blockaded by federal naval forces during the Civil War. Another early coastal growth center was Bayport in Hernando County from which cotton, timber and farm produce were exported. However, from Reconstruction to the present, Ocala has been the Region's major growth and trade center although it has experienced "boom and bust" cycles involving the citrus industry, hard rock phosphate mining and the real estate booms of the 1890's and 1920's. In recent years, a "boom" cycle has been underway in the State Road 200 area of southwestern Marion County; it has become the primary center of housing and commercial development in the county for in-migrating retirees. Dunnellon was a "boomtown" during the heyday of the phosphate industry in the years before and after the turn of the twentieth century (1889 to c. 1914); indeed, Dunnellon was the site where hard rock phosphate was discovered in Florida by Albertus Vogt in 1889. For a period, Hernando County served as a "breadbasket" for the more populated Tampa Bay area to the south. Railroad spur tracks made possible the transportation of agricultural products to Tampa. (In the modern era, the Tampa Bay area has sought to import potable water from Hernando County). Military aviation was introduced into the Region before and during the late world war with the development of U.S. Army Air Force training airfields at Dunnellon, Williston and Brooksville; still in existence, these large facilities have great potential for further aviation and industrial development (1976 Economic Development Plan: 33-35).

2. 1950--1970

The period 1950 to 1970 brought rapid growth to the Region, although less intense than in recent years. The Region had a population of 48,968 in 1950; by 1970, it had grown to 132,825, a 171.25% increase. Most of the growth occurred in Marion County which grew by 386.23% and established a regional dominance that continues to the present. Sumter and Levy were the second and third most populous in 1950 but both were supplanted by Hernando and Citrus Counties in the 1960's and 1970's.

The first significant growth in the number of persons aged 65+ also occurred. In 1950, this segment accounted for just 9.01% of the Region's population; by 1970, it had grown to 15.50% of the Region's total population. Even as early as 1950, Citrus County had the highest percentage of persons aged 65+ in the Region with 11.49%. By 1960, Citrus and Hernando Counties had the largest percentages of persons aged 65+, 16.96% and 14.07%, respectively,

and the trend has continued with almost one-third of each county's population aged 65+ in 1990.

This period brought changes to the economy of the Region: a shift away from an agricultural based economy to one driven by Retail Trade and Services. As late as 1950, the Agriculture, Forestry and Fishing sector was still the largest employment sector in the Region comprising almost 30% of total employment. By 1990, it had fallen to less than 5% as these activities were eclipsed by the rise of the Retail Trade and Services sectors. This occurred during the decade from 1950 to 1960. In 1950, the Retail Trade and Services sectors made up 15.76% and 15.17%, respectively, of total regional employment; by 1960, Retail Trade was the largest employment sector with 19.83% while Services was the second largest sector with 18.23%; Agriculture, Forestry and Fishing had fallen to 15.82%. At the same time, the United States experienced economic shifts whereby Manufacturing was replaced by Services as the nation's top employment sector. The Services sector has long been the largest sector in Florida's economy and has become even more dominant, growing from 20.51% of total employment in 1950 to 33.78% in 1990.

The decline of the central business district began during this period, especially after 1960; the trend accelerated during the 1970's and 1980's as the development of shopping centers and malls in suburban environments drew customers away from the traditional downtown business centers.

Contributing to the decline of once prosperous small towns was the decline of the railroad. Many small cities and towns depended upon the railroad, whose tracks often passed directly through the center of town. The decline of agriculture and cutbacks in rail service caused severe economic disruptions for many railroad-dependent towns in rural areas.

A public works project which might have brought considerable economic development (and major ecological damage) to the Region was the now defunct Cross-Florida Barge Canal. Started twice, once in the 1930's and again in the 1960's, a segment of the canal was constructed in the coastal zone of Citrus and Levy Counties as was the Rodman Dam near Palatka before it was abandoned and eventually deauthorized by the Congress. The 77,000 acres of the former canal project were turned over to the State of Florida which plans to preserve the corridor as the Cross Florida Greenway (Ocala Star Banner:7/26/93).

An electric generating station was constructed by the Florida Power Corporation near Crystal River on the Gulf coast. Construction of five generating facilities (four coal-fired and one nuclear) spanned the mid-1960's to the early 1980's and brought an influx of transient construction workers and permanent plant operations jobs and boosted the economies of Citrus, Levy and Marion Counties. The power plant complex was the largest private sector project in the history of the Region. Its impacts were studied by the Withlacoochee Regional Planning Council in 1980 under the Coastal Energy Impact Program which assessed the economic, employment and social repercussions of the construction of Units Four and Five to provide local governments with a tool to plan for the economic and employment disruptions anticipated after construction was completed.

3. 1970 To Present

The period from 1970 to 1990 is the reference base for this Plan and is analyzed in detail in the balance of this chapter. However, in order to complete this overview of the Region's economy, some of the relevant findings are summarized below.

The Withlacoochee Region experienced tremendous population growth from 1970 to 1990 (Table 2-6), growing from 132,825 in 1970 to 446,963 in 1990, an increase of 236.51%. The

most intensive growth occurred in Citrus and Hernando Counties, two of the fastest growing counties in the state. While Levy, Marion and Sumter doubled their populations from 1970 to 1990, the Region tripled, and Citrus and Hernando Counties almost quadrupled and quintupled, respectively. Citrus County grew by 387.16%; Hernando County grew by 494.65%. Growth in the Region outpaced Florida which grew by "only" 90.52% during the same period. However, the rapid growth of the past two decades must be put into perspective by noting the Region's minuscule share of total state population: 3.45% in 1990. (An analysis of the Region's population growth from 1970 to 1990 can be found in the General Regional Trends section of this Plan).

In-migration is responsible for this population growth which changed the face of the Region and altered its economic base. From 1980 to 1990, 99.98% of the population growth in the Region was attributable to in-migration (Table 2-11). Births accounted for a scant .02% because negative natural increases (i.e., deaths exceeding births) in Citrus and Hernando Counties offset the natural increases in the rest of the Region. In-migration was the source of 86.81% of Florida's population growth during the same period.

One-quarter (25.84%) of the Region's total population was aged 65 or older in 1990 (Table 2-21); in 1970, this age group accounted for over 15% of the population. From 1970 to 1990, this age group grew by 460.99%. Citrus and Hernando had the highest percentages of persons aged 65+, 31.31% and 30.71%, respectively. Although 22.17% of Marion County's population fell into this cohort, Marion had the largest numerical population of persons 65+, 43,189 (or 37.39% of all persons aged 65+ in the Region). The percentages of elderly population in the Region's member counties exceeded Florida's 1990 share (18.31%).

The largest industrial sector in the Region's economy for the past three Census years was Services (Table 2-57); it employed 47,743 in 1990, 30.38% of total employment in the Region. Services was also the single largest employment sector in each county:

- Citrus County, 9,347 jobs, or 31.26% of all jobs
- Hernando County, 9,643 jobs, 30.56%
- Levy County, 3,078 jobs, 31.90%
- Marion County, 22,758 jobs, 30.36%
- Sumter County, 2,917 jobs, 26.32%

Moreover, employment in the Services sector became more dominant from 1970 to 1990 in every county in the Region. Given the large retired population it is not surprising that 27.78% of Services employment in 1990 was in the Health Services sub-sector, and that this sub-sector was the largest of the Services sub-sectors. In 1970, 1,708 persons were employed in Health Services, but by 1990 it had grown to 13,262, an increase of 676.46%. Services sub-sectors are analyzed in "Industrial Sectors of the Economy" below.

Retail Trade was the second largest sector in terms of total employment in 1990 comprising 33,359 jobs or 21.23%.

As the Retail Trade and Services sectors grew, the Agriculture, Forestry, Fishing sector declined. In 1970, it was still the third largest employment sector, accounting for 10.84% of all employment. By 1990, it had fallen to seventh or 4.96% of all jobs. Its slippage in percentage of total employment is an unfortunate trend for a rural region with an abundance of agricultural, forestry, marine and aquatic resources.

Employment in the Withlacoochee Region grew by 256.52% from 1970 to 1990. In real numbers this was an increase from 44,077 jobs in 1970 to 157,144 jobs in 1990, or 113,067 new jobs. This is the equivalent of an annualized increase of 5,653 new jobs per year over the

twenty year period. (However, the civilian labor force grew by 122,905 or 268.23% over the same period, an annualized increase of 6,145.25 workers entering the civilian labor force every year). The rapid growth in the labor force contributed to the unemployment problem because too many people were looking for work in a rural Region which lacks the economic development infrastructure to create sufficient jobs (see Labor Force section).

Historically (and in spite of rapid growth), the Withlacoochee Region has been plagued by chronic, high unemployment, especially among minorities (Table 2-32). Table 2-30 summarizes annual average unemployment rates in the Region, its member counties and the state from 1975 to 1992. The most striking feature of the data is that the Region's unemployment has almost always exceeded the state. The severity of the problem is indicated by the frequent incidence of double-digit unemployment in the member counties, especially during Recession years. Historically, Hernando and Sumter Counties have had the highest unemployment in the Region. Sumter County had the unfortunate distinction of leading the Region with the highest annual average unemployment from 1981 to 1991. On the other hand, Levy County has often had the lowest unemployment presumably because of large numbers of workers commuting to Ocala and Gainesville for employment.

Although record growth and development occurred during this period, especially since 1980, it was marred by various economic disruptions such as the Arab Oil Embargo in 1973 and ensuing increases in gasoline prices; the high inflation rates of the late 1970's and early 1980's; recessions in 1974-75, 1979-1980, 1981-1982, and 1991-1992; continued high unemployment, and a slump in the Region's economy and housing market since 1987.

Over the past generation, suburban commercial development and multi-use, planned unit developments in outlying areas have contributed to the decline of traditional downtown business districts in the Region. The decline of the central business district in the Region began in the 1960's; the trend accelerated during the 1970's and 1980's as the development of shopping centers and malls in suburban and rural environments drew customers away from the traditional downtown business districts. Downtown Ocala was one of the first victims of suburban shopping centers and malls, although in recent years the city has established a downtown redevelopment agency and has been involved in innovative initiatives to revitalize the downtown area. In vevess, the county seat of Citrus County, has an established redevelopment agency that has made significant progress in establishing a central business district near Courthouse Square.

Another cause of the decline of downtown areas, especially in small agricultural towns, was the decline and departure of the railroad. Many small cities and towns depended upon the railroad, whose tracks often passed directly through the center of town. The decline of agriculture and cutbacks in rail service often caused severe economic disruptions for many agriculture and railroad-dependent towns in rural areas, especially in Sumter and Levy Counties.

B. Industrial Sectors of the Economy

The following section presents a brief analysis of the primary sectors of the Region's economy. It discusses the strengths and weaknesses of each sector including a discussion of employment and business establishment growth. For the convenience of the reader, regional economic trends are summarized at the end of this section.

1. Agriculture, Forestry & Fishing

Formerly the dominant sector in the Withlacoochee Region's economy, it has been in decline since the 1950's when Retail Trade and Services began their rise to economic dominance. Agricultural data is summarized in Table 2-5. However, significant agricultural activities are

still carried out in the Withlacoochee Region. The prevailing rural nature of the Region and the former dominance of the agricultural sector imply that agriculture-related businesses might rebound if provided the proper incentives and market opportunities. In 1992, there were 3,546 farms with a combined acreage of 871,816 acres; the average farm size was 246 acres. A "farm" is defined as "any place from which \$1,000 or more of agricultural products were produced and sold or normally would have sold during the Census year" (1987 Census of Agriculture: p. vii). The total market value of products sold was \$167,760,000. Livestock and poultry operations were the dominant agricultural activity, accounting for \$119,705,000 in sales, or 71.35% of total sales. Cattle ranching was the primary agricultural activity in the Region in 1992. Watermelons were the primary crop in the Region with 6,271 acres harvested in 1992, up from 5,999 acres in 1987. Levy County lead the Region with 2,594 acres in watermelons harvested in 1992. Other crops farmed at a much smaller scale include sweet peppers, squash, cucumbers, cantaloupes and sweet corn. Sumter and Marion Counties had the largest and most diverse vegetable crops in 1992.

The Region is rich in timber and forest resources. Table 2-3 summarizes the type and quantity of forest products harvested in 1991. That year almost 32% of the hardwood saw logs harvested in Florida came from the Withlacoochee Region as did almost 20% of the softwood saw logs.

The Region has abundant marine fishery resources along its coastal zone and aquatic fishery resources in its numerous inland lakes, rivers and springs. In 1991, almost nine percent of the shellfish taken in Florida was harvested off the Region's coast. Fish and shellfish landings are presented in Table 2-4. Landings have fluctuated in recent years because of newly imposed state limits on popular species such as redfish and because of seepage of coliform bacteria into coastal waters from inland residential septic tanks, triggering occasional state bans on shellfishing. Scallop harvesting was also halted south of the Suwannee River because of over-harvesting (St. Petersburg Times: 4/29/95, p. 1-B). The decline in number of trips in 1991 could be reflective of these aspects as well as the economic downturn of the early 1990's. Expected to have a negative impact on commercial fishing in the Region is the constitutional amendment approved by Florida voters in 1994 banning gill nets and all nets larger than 500 square feet. Indicative of this expectation at the time of this writing (May, 1995) are efforts by job training service providers to prepare training programs utilizing state and federal funding to assist displaced commercial fishermen in learning different trades (Citrus County Chronicle: 4/7/95). One effort in Citrus County to train displaced fishermen to raise clams and oysters was abandoned when Citrus County's off-shore waters were tested and determined to have insufficient bottom environment for clam-harvesting (St. Petersburg Times: 4/29/95, p. 1-B).

In 1990, employment in the Agriculture, Forestry and Fishing sector was 7,799, or 4.96% of total employment in the Region which was higher than the comparable percentage for the state as a whole (2.88%). Employment grew by 63.26%, one of only two sectors in the Region's economy which did not grow by more than 200 percent between 1970 and 1990. Growth in comparable employment in the state was 50.84%.

The sector supported a business base of 227 business establishments in 1990 (note: farmers are generally self-employed and are not counted as "business establishments" by the Census Bureau).

2. Mining

Mining has declined in significance in recent years. Employment growth between 1970 and 1990 was marginal (8.76%), compared with a 21.19% growth in the state. Mining employment in Hernando County dropped by 25.33%, although it lead the Region in mining employment in 1990. Levy County posted a very healthy 327.59% increase (the fastest growing

employment sector in Levy County from 1970 to 1990). The 1990 County Business Patterns indicated that 32 business establishments in the Region were engaged in Mining activities. A discussion of the mineral resources of the Region appears in the Natural Resources chapter. The amount of personal income generated by mining cannot be calculated for the Region because of non-disclosure of data to protect proprietary interests.

3. Construction

Construction has been one of the bright spots in the Region's economy although residential housing construction has been in a regional slump since about 1987. The period 1970 to 1990 saw record growth in construction of housing and commercial and institutional structures. Construction at the Florida Power Energy Park near Crystal River was the largest single construction project during this period. Housing development is perhaps the most common contributor to employment and business growth in the Construction sector. Developments in the SR-200 corridor of Marion County and in central Citrus and Hernando Counties have made these areas construction hotspots. However, the overall residential construction slumped in the late 1980's and early 1990's.

Construction employment in the Region grew by 199.41% from 1970 to 1990, outperforming the state (118.20%). Hernando County lead the Region in construction employment growth (561.52%); Levy County had the smallest growth (75.86%).

In 1990 Construction accounted for 11.29% of private, non-farm personal income in the Withlacoochee Region (\$245 million), which was marginally higher than the state percentage (8.14%). Income grew by 1,419.85% from 1970 when it generated \$16.13 million and accounted for 8.87% of private, non-farm income.

11,359 establishments in the Region were engaged in construction in 1990.

4. Manufacturing

Total Manufacturing employment in the Region in 1990 was 17,388, or 11.07% of total employment; this was slightly higher than the percentage of Manufacturing employment in the state (10.48%). Employment growth from 1970 to 1990 was 265.29%, or more than three times the comparable growth rate for the state (78.10%).

Manufacturing accounted for 13.65% of the 1990 private, non-farm personal income in the Region (\$296.36 million). It generated a slightly smaller percentage for the state as a whole (12.83%). Growth in personal income from Manufacturing in the Region was 744.99% over 1970 (\$15.19 million), but Manufacturing's percentage of overall income was down sharply from 1970 levels (19.28%).

In 1990 there were 426 private sector business establishments engaged in manufacturing activities, or 4.47% of the Region's existing business base.

5. Transportation, Communications & Public Utilities

The Florida Power Corporation is the major presence in the Region in this sector of the economy, followed by the numerous electrical cooperatives that serve rural areas. The Florida Power Energy Park near Crystal River is the only electrical generating station in the Region and a major employer in Citrus County.

Total employment in this sector was 11,695, or 7.44% of total employment in the Region. This was almost identical with the state percentage (7.65%). Employment growth from 1970 to 1990 was 278.23%, which significantly outperformed growth for the state (138.20%).

This sector accounted for 9.38% of the 1990 private, non-farm personal income in the Region (\$203.4 million). It generated a slightly smaller percentage for the state as a whole (7.83%). Growth in income was 1,241.19% from 1970 levels (\$15.19 million, or 8.35% of total income in 1970).

In 1990 this sector supported 292 private sector business establishments, or 3.06% of the Region's existing business base.

6. Wholesale Trade

A relatively small sector, Wholesale Trade accounted for 6,248 jobs in 1990, just 3.98% of total employment in the Region. However, it was the second fastest growing sector in the Region in terms of percentage of growth, increasing by 304.40% from 1970 to 1990. By comparison, the Wholesale Trade sector in the state accounted for 4.63% of total state employment and grew by 146.47%.

Wholesale Trade generated 6.48% of private, non-farm income in 1990 (\$140.69 million), a slightly less percentage than for the state as a whole (7.91%). Growth from 1970 cannot be accurately gauged since the 1970 Census combined the Wholesale and Retail Trade sectors.

In 1990, there were 511 establishments engaged in wholesale trade activities; this comprised 5.36% of the Region's existing business base.

7. Retail Trade

Retail Trade was the second largest sector of the Region's economy in 1990, accounting for 33,359 jobs, or 21.23% of total employment in the Region. This was a slightly higher percentage than for the state (19.57%). Growth in Retail Trade employment from 1970 to 1990 was 287.62%, or the fourth fastest growing sector in the Region. Twenty year growth for the state was 146.12%.

Retail Trade generated 18.85% of the Region's private, non-farm income in 1990 (\$409.10 million). This exceeded the percentage for the state (15.30%). Growth from 1970 cannot be accurately gauged since the 1970 Census combined the Wholesale and Retail Trade sectors.

In 1990 there were 2,657 establishments engaged in retail activities, or 27.85% of the Region's existing business base. It was the second largest sector in terms of numbers of business establishments.

8. Finance, Insurance & Real Estate

This was the fastest growing sector for both the regional and state economies between 1970 and 1990. In 1990 it accounted for 9,973 jobs in the Region, or 6.35% of total employment, marginally less than its percentage for the state (8.06%). Although a relatively small sector, it grew by 410.39% which was almost double its growth rate in the state (220.77%). Its growth was probably driven by a combination of the housing boom and the in-migration of new residents which caused an increased demand for such services.

This sector generated 5.27% of the Region's private, non-farm personal income in 1990 (\$114.42 million), marginally less than the percentage for the state (8.53%). Growth in income

was 553.85% from 1970 levels (\$17.50 million), but its percentage of regional income dropped from 1970 levels (9.62%).

In 1990 there were 798 establishments engaged in providing financial, insurance and real estate activities, or 8.36% of the Region's existing business base.

9. Services

The largest sector in both the Region and state economies in 1990 was Services. It accounted for 47,743 jobs in the Region, or 30.38% of total employment in the Region; this was slightly less than its percentage for the state (33.785). From 1970 to 1990, it grew by 301.30% in the Region and "only" 173.05% in the state.

Services generated 32.45% of the Region's private, non-farm income in 1990 (\$704.27 million). The percentage for the state was higher (38.08%). Growth in Services income from 1970 to 1990 for the Region was 1,882.58% over 1970 levels (\$35.52 million, or 19.53% of 1970 income).

In 1990 there were 2,771 establishments engaged in services activities, or 29.05% of the Region's existing business base.

The domination of the Services sector warrants analysis of its component sub-sectors. Health Services was the largest of the Services component sub-sectors in 1990, comprising 27.78% of the entire Services sector. This represented a significant shift over 1970 when Personal Services was the largest Services sub-sector in the Region and over 1980 when Education was the largest Services sub-sector. The rankings of the Services sub-sectors for 1990 are presented below. (Similar data for 1970, 1980 and 1990 also appears in Tables 2-49, 2-50 and 2-51).

- ① Health Services, 13,262 workers, 27.78%
- ② Education, 11,111, 23.27%
- ③ Other Professional Services (i.e., accounting, engineering, etc.), 7,652, 16.03%
- ④ Business & Repair Services, 7,319, 15.33%
- ⑤ Personal Services, 5,576, 11.68%
- ⑥ Entertainment & Recreation Services, 2,823, 5.91%

Health Services was the fastest growing Services sub-sector between 1970 and 1990 (Table 2-52), growing by 676.46%. Growth in the Services sub-sectors during this period are presented below:

- ① Health Services, 676.46%
- ② Business & Repair Services, 597.05%
- ③ Other Professional Services, 420.54%
- ④ Entertainment & Recreation Services, 275.90%
- ⑤ Education Services, 227.08%
- ⑥ Personal Services, 58.01%

The Region's booming Health Care Services industry is faced with uncertainties in the current push for national and state health care reform. However, the reforms ultimately enacted will probably have a great impact on the Region's health care industry due to the Region's large population of elderly citizens who are dependent on the health care system. The current debate has created concerns for the service providers, patients and the general public.

a. Tourism

The move toward eco-tourism is on the rise in the Region--indicated by the recent creation of the Nature Coast Coalition which includes Levy, Citrus and Hernando

Counties to foster eco-tourism in the Big Bend coastal region of Florida. Also, Citrus County appointed an Eco-tourism Task Force (which eventually became a permanent Eco-Tourism Committee to the Tourist Development Council) to research eco-tourism opportunities in the county and--in concert with local chambers of commerce, businesses and environmental agencies--culminated in the publication of an Eco-Tourism Information Kit. The acceptance of eco-tourism by tourism development groups in the region indicates that eco-tourism is gaining acceptance as the general trend of tourism in the Withlacoochee Region.

Tourism plays an important but largely unmeasurable role in the economy of the Withlacoochee Region. For understandable proprietary reasons the privately owned commercial tourist attractions and related establishment (hotels, motels and restaurants) in the Region are reluctant to publicize attendance figures and gross sales. Instead the discussion of tourism herein has been limited to public data sources for attendance at selected state parks, memorials and recreation areas (Table 2-53). It should be understood that these data are under-representative of total tourism in the Region. Total attendance at selected state parks, memorials and recreation areas in fiscal-year 1991-92 was 694,089, up 138.32% from 291,240 in fiscal year 1971-72. The list of facilities presented in Table 2-53 is indicative of the types of eco-tourism opportunities within the Region: historical sites, nature preserves, boating and swimming areas, fishing and hunting locations, etc. The attendance figures have been presented, where available, in five year increments.

Tourism infrastructure (hotels, motels and eating establishments) is summarized in Table 2-54. The information is presented on a fiscal year basis for 1972/73, 1982/83 and 1992/93. The data indicate the number of hotels and motels declined over the past twenty years, but eating establishments increased. The number of hotels decreased from seven in 1972/73 to three in 1982/83 but increased to six by 1992/93. However, the number of hotel rooms increased from 147 rooms in Fiscal Year 1982/83 to 885 rooms in 1992/93, an increase of 502.04% (room data for 1972/73 were not available); the average number of rooms per establishment increased over the same period from 49 rooms per hotel to 147.5 rooms per hotel. Motels, however, have experienced a significant decline since 1972/73 when there were 202 motels in the Region, but by 1992/93 these had declined to 136, a 32.67% decrease. The number of motel rooms declined from 5,295 rooms in 1982/83 to 4,655 rooms in 1992/93, a decrease of 12.09% (room data was not available for 1972/73]. The average number of rooms per motel increased from 30.26 in 1982/83 to 34.22 in 1992/93. Restaurants increased from 442 establishments in 1972/93 to 1,069 establishments in 1992/93, an increase of 141.86%. The total number of restaurant seats almost doubled from 34,241 in 1982/83 to 70,388 in 1992/93 (seating data for 1972/73 was not available). The average seating capacity per establishment increased from 48.36 seats per establishment to 65.84 seats per establishment during the same period. It must be noted that growth in hotels, motels and restaurants cannot be totally attributed to tourism; population growth, increased local demand and the growth of the Retail Trade and Services sectors are more likely the chief underlying cause of this growth.

10. Public Administration

Public Administration (government) has been an important employer in the Region over the years. Employment in the Public Administration sector in 1990 was 7,434, or 4.74% of total employment in the Region. This was slightly lower than the comparable statistic for the state (5.01%). However, employment in Public Administration was larger than employment in Wholesale Trade sector (6,248) and Mining (894). Employment in Public Administration grew

by 238.83% between 1970 and 1990 making it the eighth fastestgrowing sector, growing faster than Construction (230.42%); Agriculture, Forestry and Fishing, (63.26%) and Mining (8.76%). While growth in Public Administration is indicative of the growth in government services required to meet the governmental and public safety needs of the Region's increased population, the fact that Public Administration grew faster than wealth creating economic sectors such as Construction; Agriculture, Forestry and Fishing, and Mining could be interpreted as further evidence of the weakness or decline of these sectors.

C. Trends of Industrial Sectors

1. Industrial Sectors by Size

Employment by industrial sector is summarized for 1970, 1980 and 1990 in Tables 2-55, 2-56 and 2-57. The employment data demonstrate the Retail Trade and Services-oriented nature of the Region's economy. The largest single employment sector for the past three Census years was Services; it employed 47,743 in 1990 (or 30.38% of total employment in the Region). Services was also the single largest employment sector in each county:

- Citrus County, 9,347 employed in Servicessector; 31.26% of total county employment
- Hernando County, 9,643; 30.56%
- Levy County, 3,078; 31.90%
- Marion County, 22,758; 30.36%
- Sumter County, 2,917; 30.38%

The following is a ranking of total 1990 employment by sector size for the Withlacoochee Region:

- ① Services, 47,743 jobs, 30.38% of total employment in the Region
- ② Retail Trade, 33,359 jobs, 21.23%
- ③ Manufacturing, 17,388 jobs, 11.07%
- ④ Construction, 14,611 jobs, 9.30%
- ⑤ Transportation/Communications/Public Utilities, 11,695 jobs, 7.44%
- ⑥ Financial/Insurance/Real Estate, 9,973 jobs, 6.35%
- ⑦ Agriculture/Forestry/Fisheries, 7,799 jobs, 4.96%
- ⑧ Public Administration, 7,434, 4.73%
- ⑨ Wholesale Trade, 6,248, 3.98%
- ⑩ Mining, 894, 0.57%.

2. Total Employment Growth by Industrial Sector

Employment in the Withlacoochee Region grew by 256.52% from 1970 to 1990. In real numbers this was an increase from 44,077 jobs in 1970 to 157,144 jobs in 1990, or 113,067 new jobs. This is the equivalent of an annualized increase of 5,653 new jobs per year over the twenty year period. (Remember, however, that the civilian labor force in 1990 was 168,725 or 7.37% higher than the total number of jobs). Table 2-58 summarizes employment growth from 1970 to 1990 in terms of percent of growth. Although the largest single employment sector in the Region, Services, ranked third in overall employment growth by industrial sector. Finance, Insurance & Real Estate was the fastest growing sector with employment growth of 410.39%. The ten industrial sectors ranked in terms of percentage of new jobs created from 1970 to 1990 were:

- ① Finance/Insurance/Real Estate, 410.39%%
- ② Wholesale Trade, 304.40%
- ③ Services, 301.03%
- ④ Retail Trade, 287.62%
- ⑤ Transportation/Communications/Public Utilities, 278.23%

- ⑥ Manufacturing, 265.29%
- ⑦ Public Administration, 238.83%
- ⑧ Construction, 230.42%
- ⑨ Agriculture/Forestry/Fishing, 63.26%
- ⑩ Mining, 8.76%

Percentages of growth can sometimes be misleading. The true domination of the regional economy by the Service sector is revealed when the actual numbers of new jobs created from 1970 to 1990 are analyzed. Services created 35,838 jobs in the Region or almost one out of every three new jobs created during this period. Retail Trade created 24,753 jobs during the same period, or about one of every four new jobs. The following is a ranking of the ten industrial sectors in terms of actual numbers of jobs created from 1970 to 1990:

- ① Services, 35,838 new jobs, 32.16% of all new jobs created
- ② Retail Trade, 24,753 jobs, 22.21%
- ③ Manufacturing, 11,461 jobs, 10.28%
- ④ Construction, 9,731, 8.73%
- ⑤ Transportation/Communications/Public Utilities, 8,603 jobs, 7.72%
- ⑥ Finance/Insurance/Real Estate, 8,019 jobs, 7.20%
- ⑦ Public Administration, 5,240 jobs, 4.70%
- ⑧ Wholesale Trade, 4,703 jobs, 4.22%
- ⑨ Agriculture/Forestry/Fishing, 3,022 jobs, 2.71%
- ⑩ Mining, 72, 0.06%

D. Economic Trends

- Rapid population growth caused by in-migration is the primary generator of growth in the Region's economy.
- Since 1950, the Region's economy has changed from producer-based to consumer-based.
- The Region's economy is dominated by the Services and Retail Trade sectors which accounted for over half of total employment and business establishments in 1990.
- The relative importance of natural resource-based activities such as agriculture, fishing, forestry and mining has declined. The fishing net ban is expected to exacerbate this trend; increased shellfish cultivation programs have the potential to transform the commercial fishing industry in the region's coastal waters.
- The fastest growing sector in the Region's (and Florida) economy was Finance, Insurance and Real Estate sector.
- The Region has a small but relatively diverse and growing Manufacturing base that created almost 12,000 jobs between 1970 and 1990.
- The Health Services sub-sector of the Services Sector grew by almost 700% between 1970 and 1990, indicative of the increased demand for health care services by the Region's in-migrating older population.

E. Civilian Labor Force

The civilian labor force in the Withlacoochee Region grew rapidly over the past two decades. In 1990, the U.S. Census recorded a regional civilian labor force of 168,725 persons, an increase of 268.23% from 1970. The Region's labor force grew faster than both the regional population (236.51%) and the state labor force (124.95%) during the same period. The labor force of the Region's member counties grew substantially faster than the state, except Levy County which

matched it. The fastest growing was Hernando, where the labor force increased by 520.58% from 1970 to 1990. Citrus County was close behind with 492.27%. Growth in the other counties, while impressive, was modest by comparison. Table 2-27 presents civilian labor force data for the Census years 1970, 1980 and 1990.

The regional labor force as a percentage of regional population, an indicator of labor force participation, slowly increased from 34.5% in 1970 to 35.5% in 1980 and to 37.8% in 1990. The state percentage of labor force to total population grew from 37.1% in 1970 to 43.3% in 1980 to 47.7% in 1990. Slow growth in regional labor force participation rates are indicative of the increasingly retirement oriented nature of the region.

Although Marion County, the chief trade center of the Region, remained dominant in size of labor force, rapid growth elsewhere in the Region diminished this over the past twenty years. In 1970, Marion County contained more than half (55.23%) of the Region's entire labor force. This share fell to 49.32% in 1980 and 47.6% in 1990. However, the Marion labor force is still larger than that of any three of the other four counties combined.

1. Female Participation in the Labor Force

The increase in regional labor force can be attributed to in-migration and increased numbers of women entering the work place. Table 2-28 documents a 342% increase in female participation in the regional labor force from 1970 to 1990. Women entered the regional labor force at a greater rate than the state (182.89%). In 1970, only 36.25% of females in the Region over the age of 16 were in the work force; in 1990, female participation was 46.18%, slightly higher than the state (45.59%).

2. Participation by Age Groups

When correlated with 1990 Census age groups (Table 2-29), civilian labor force data shows the Region had an older labor force than the state as a whole. The Region's percentages of labor force in the 55 to 64 and 65+ age groups exceeded those for the state but the state had higher percentages of workers in the younger age groups (16 to 19, 20 to 24 and 25-54). When examined by gender and age group, the same trend continued. The Region had marginally higher percentages of men and women aged 55 to 64 and 65+ while the state had higher percentages in the younger gender-age groups. The Region's counties generally followed the regional trends.

F. Unemployment

Historically (and in spite of rapid economic growth), the Withlacoochee Region has been plagued by chronic, high unemployment. Table 2-30 summarizes annual average unemployment rates in the Region, its member counties and the state from 1975 to 1992 (Note: data prior to 1974 are not statistically comparable and have not been included; also, unemployment rates issued in 1994 and after are not comparable with previous years). The most striking feature of the data is that the Region's unemployment has always exceeded the state. The severity of the problem is indicated by the frequent incidence of double-digit unemployment in the member counties, especially during Recession years. Historically, Hernando and Sumter Counties have had the highest unemployment in the Region. Sumter County had the unfortunate distinction of leading the Region with the highest annual average unemployment from 1981 to 1991. On the other hand, Levy County has had the lowest unemployment presumably because of large numbers of workers commuting to Ocala and Gainesville for employment; 45.33% of the Levy County work force commutes to jobs outside the County.

The Region's unemployment quagmire can be further demonstrated by the following analogy. If Unemployment was a Sector of the economy, such as Retail Trade or Services, according to the July, 1993 unemployment rates, it would have been:

- ...the third largest industrial sector in the Region (13,990 jobs)
- ...third largest in Marion County (6,826 jobs)
- ...third largest in Citrus County (2,818 jobs)
- ...third largest in Sumter County (948 jobs)
- ...fourth largest in Hernando County (2,638 jobs)
- ...fifth largest in Levy County (760 jobs)

The rapid growth in the labor force has exacerbated the unemployment problem because too many people are looking for work in a rural Region which lacks the economic development infrastructure to create sufficient jobs.

1. Characteristics of the Unemployed

a. Age and Gender (All Races)

Unemployment in the Region exceeded the state averages in all 1990 Census age-gender groups (Table 2-31) except Males aged 20 to 24 where the Region's unemployment rate (7.05%) was one percentage point less than the state (8.08%). This could be due to the employment of young adult males in the Construction sector of the economy. The Region's highest unemployment (all races) was among Males and Females aged 16 to 19 (17.66% and 15.25%, respectively). The Region's lowest unemployment was among Males and Females aged 25 to 54 (5.60% and 5.87%, respectively). The state also had its highest unemployment among Males and Females aged 16 to 19 (16.17% and 14.73%, respectively); the state's lowest unemployment was among Males aged 25 to 54 (4.59%) and Females aged 55 to 64 (4.81%).

Unemployment rates among females in the Region were higher than those for Males in all age groups except in the 55 to 64 age group. However, the highest single county unemployment rate in the Region was for Males aged 16 to 19 in Hernando County (24.01%); the lowest was among women aged 55 to 64 in Sumter County (1.83%). Unemployment was rampant among young people aged 16 to 19 with every county posting double-digit unemployment for young Males and Females with the sole exception of young Males in Sumter County (6.42%).

b. Unemployment Among Minorities

Unemployment among Black Persons (Table 2-32) was substantially higher than the corresponding unemployment rates among White Persons (Table 2-33) in the Region and in the state. The highest unemployment in the Region was among young Black Males and Females; unemployment ranged from highs of 33.33% for young Black Males aged 16 to 19 in Levy County to 55.00% for young Black Females in the same age group in Sumter County. The unemployment rate among young Black Males and Females aged 16 to 19 in the Region (28.21% and 25.76%, respectively) was actually lower than the corresponding unemployment rates for the state (31.21% and 30.16%, respectively). Young Black Males in the 20 to 24 age group had unemployment rates over 20% in Levy, Marion and Sumter Counties, 19.24% in the Region and 16.92% in the state. Unemployment among young Black Females in the same age group were low but Marion County's unemployment rate of 25.87% in that category skewed the regional figure to 20.44%, which was well ahead of the state (17.97%).

Unemployment rates for Black Persons in the Region were significantly lower in the 25 to 54 and 65+ age groups for both Males and Females, but unemployment rates for Black Females in these age groups were slightly lower than for Black Males. This trend was repeated at the state level. No general trend for these age groups was readily discernable for the Region's member counties.

G. Educational Attainment

The educational attainment of the Region's labor force has increased over the past twenty years. Tables 2-34, 2-35 and 2-36 summarize the educational attainment of persons aged 25+ in 1970, 1980 and 1990. The reader is cautioned that the data indicate the highest educational level achieved, therefore, the total number of high school graduates for persons aged 25+ would be the sum of the columns "High School Graduates," "Some College" and "College Graduates."

The most significant findings were the decline in 1990 in the percentage of persons whose highest educational achievement was only a high school diploma and the increase in the percentage of persons with post high school education. The data for 1990 indicate almost a third (32.86%) of the population aged 25+ either had some college (including Associates degrees) or had obtained a college degree (Bachelor's or higher). This percentage was up sharply from 1980 (21.01%), and from 1970 (15.29%). While encouraging, the regional percentage of persons with college experience remained far behind the state (44.30%) in 1990.

Reflective of the continuing increase in educational attainment is the percentage of regional population aged 25+ with at least a high school diploma: 68.84% in 1990, up from 57.51% in 1980 and 43.21% in 1970. However, the Region still lagged behind the state (74.45%).

H. Average Wage Levels

Average wages per job in the Region increased from 1980 to 1990 by 71.92%. Average wages increased in Citrus, Hernando, Marion and Sumter by approximately 63%, but by only 42.52% in Levy County. Citrus County posted the highest average wage per job in 1990 (\$17,837). Levy County had the lowest average earnings (\$14,833). By comparison, average wages in Florida grew by 65.01% and stood at \$20,890 in 1990. Average wages in the state ran 17.05% ahead of the Region, or \$3,043 higher. Average wages per job are presented in Table 2-37.

Average wages for selected occupations in the Withlacoochee Region and the state are presented in Table 2-38. An examination of the data reveals that wages in Florida were on the average approximately 11% higher than in the Withlacoochee Region. However, there were a few notable exceptions where regional wages were higher. These included butchers, cashiers, concrete finishers, electronic assemblers, fork lift operators, helpers-carpenters, janitors, medical assistants, order clerks, registered nurses, salespersons-retail, shipping/receiving clerks, truck drivers-heavy and typists. These occupations generally fell into the Retail Trade, Construction and Services sectors.

The large number of Retail Trade jobs served in part to keep average wages in the Region lower than the state's because Retail Trade is an economic activity that generally tends to circulate existing money rather than generate new capital; it also pays low wages (often minimum wage) to a relatively unskilled work force.

I. Labor Force Trends

- The civilian labor force grew faster than the total number of jobs.
- The Region is plagued by chronic, high unemployment, especially among young people and minorities.
- The Region lags behind the state in levels of educational attainment.
- Approximately one-third of the Region's adult population have college experience.
- Almost half of the Region's total civilian labor force and jobs were in Marion County.

- Average wages have increased, but are still generally lower than average wages in the state as a whole.

J. Per Capita Income

Table 2-40 shows PerCapita Income for 1969, 1979 and 1989 (Census surveys of income are carried out one year prior to the decennial population survey). Per capita income (total income divided by total population) indicates the relative wealth of the population, although it does not show the economic disparities within the jurisdiction's population. In 1990, Citrus had the highest per capita income in the Region, followed closely by Hernando and Marion. The per capita incomes for Levy and Sumter Counties were significantly lower, a sign of the relative poverty of these counties. The table demonstrates tremendous growth in per capita income from 1969 to 1989, although much of it occurred during the Seventies due to the high inflation rates of that decade. Except for Levy County, the growth in per capita income from 1970 to 1990 in the Region exceeded the state. Per capita income data for the Region as a whole were not available.

K. Median Family Income

Median family income is a measure of income distribution and the relative wealth of families. Half the families earn more than the median family income statistic, half earn less. Table 2-41 presents median family income for the Withlacoochee Region for 1969, 1979 and 1989. All five counties outgrew the state even though Levy's growth was only fractionally more. Citrus and Hernando grew the fastest; Levy and Marion grew the slowest. However, in terms of actual dollars, all were significantly below the state's median family income, a disparity that increased from 1969 to 1989 indicating the Region is not only poorer than the state, but that the state is becoming wealthier at a faster pace than the Region.

L. Total Personal Income

Total Personal Income data from the U.S. Department of Commerce, Bureau of Economic Analysis is an indicator of the relative capacity to create wealth and is presented in Table 2-42. From 1970 to 1990, total personal income in the Withlacoochee Region increased by 1,682.04% which was twice the state increase (800.09%). The fastest growing counties in the Region were Citrus and Hernando with increases of 3,008.29% and 3,266.67%, respectively. (This figures must be approached with caution because of the relatively low incomes in 1970, the effects of inflation and changes in methodologies). Marion County remained the dominant county with 44.24% of total personal income in the Region, although this figure was lower than in 1970 (55.18%). Increases in the regional shares of total personal income by Citrus and Hernando Counties served to erode Marion County's lion's share over the past twenty years. In 1990, the combined percentages of regional income for Citrus and Hernando Counties was 44.49%, a substantial increase from 24.48% in 1970. Levy and Sumter Counties' shares of regional income dropped in 1990 to 4.94% and 6.33%, respectively.

M. Sources of Personal Income

Although total personal income increased astronomically over the past twenty years, a study of its components reveals the glaring weaknesses in the regional economy: (1). the high incidence of transfer payments caused by a large retired population and chronic unemployment, and (2). regional income is no longer generated primarily by private sector earnings.

Tables 2-43 and 2-44 demonstrate shifts in two key sources of income in the Region's economy: transfer payments and private sector, non-farm earnings. The former shows the increase of transfer payments as a percent of total personal income; the latter shows the decline in percentage of private sector, non-farm earnings (discussed below). Transfer payments are, generally, pension and retirement benefits as well as unemployment benefits. High levels of transfer payments tend to promote the Retail Trade and Services sectors of the economy through purchase of goods and

services required to maintain daily life. Given the large retired population and chronic high unemployment in the Region, it is not surprising that transfer payments accounted for 26.1% of total personal income in the Region 1990, an increase from 16.7% in 1970. By comparison, transfer payments accounted for only 16.3% of the Florida's total personal income in 1990. Four counties in the Region were among the highest in Florida in percentage of transfer payments: Sumter County was 4th highest in the state, Citrus County was 8th, Hernando County was tied for 12th and Levy County was 15th.

Private sector, non-farm earnings are the incomes generated by businesses of all types, excluding farms. Its decline as a percentage of total personal income is a troubling sign of the diminished relative importance of the private sector as the primary producer of income. In 1970, the private sector generated 52.7% of the Region's income; by 1990, it had declined to 36.62%. The declines in Hernando, Levy and Sumter Counties were dramatic: from 51.0%, 49.1% and 46.2%, respectively, in 1970, to 27.4%, 28.1% and 27.1%, respectively, in 1990. The decline of the state percentage was modest: from 56.3% in 1970 to 51.2% in 1990.

N. Private Sector, Non-Farm Earnings

The source of private sector, non-farm earnings (Table 2-45, 2-46 and 2-47) is reflective of employment by industrial sector in the Region. In 1990, 51.30% of private sector earnings came from the Services and Retail Trade Sectors combined (which together also accounted for 51.62% of employment); in 1980, the same combination accounted for only 36.43% of private sector earnings (the same methodology cannot be applied to 1970 because wholesale and retail trade were combined into a single category). Individually, the Services Sector generated 32.45% of personal earnings while the Retail Trade Sector accounted for 18.85%. Manufacturing was third with 13.65%. The tables reveal the growth of Services income which accounted for 19.53% in 1970 and 16.40% of Regional income. Construction income fell marginally from 1980 to 1990, indicative of the housing slump of the late 1980's in the Region and the state.

(Note: income data discussed in sub-sections 12, 13 and 14 was from the U.S. Department of Commerce, Bureau of Economic Analysis and is not comparable with Census income data discussed in other sub-sections).

O. Poverty Levels

Table 2-48 summarizes the numbers of persons living in poverty in the Withlacoochee Region. Although the percentage of persons living in poverty has gone down, the real numbers have increased. (Presumably, in-migration of more affluent persons has had the statistical effect of diluting the impoverished population as a percentage of the total population.) In 1969, 33,435 persons, or 25.17% of the Region's population were living at or below the poverty level. By 1989, the percentage had decreased to 16.42%, but the real number of persons in poverty almost doubled, increasing to 61,480 in 1989, an 83.88% increase over 1969. In the past twenty years, Levy and Sumter Counties led the Region with the highest poverty levels. The percentage of persons living in poverty in Levy County remained virtually unchanged from 1979 to 1989. The percentage for Sumter County declined fractionally. In Citrus and Hernando Counties, the percentage of persons in poverty was cut in half from 1969 to 1989, but the real number of persons in poverty increased by 152.62% and 158.00%, respectively. Even in Marion County, the economically dominant county in the Region, the real number of persons in poverty increased by 66.09%, a figure which translates into 14.60% of the total population.

By comparison, the percentage of persons in poverty in Florida decreased from 16.40% in 1969 to 12.70% in 1989, but the real number of persons in poverty increased by 47.82%. Except for Sumter County, the Region's increase of persons in poverty was faster than in the state as a whole.

P. Income Trends

- Incomes have increased dramatically from previously low levels, but still remain below state levels.
- The Region has a high incidence of income from transfer payments.
- Private sector earnings are no longer the primary source of income in the Region.
- The Retail Trade and Services Sectors generate more than half of the private sector earnings in the Region.
- The Region has a higher incidence of persons in poverty than the state as a whole.

III. THE SIGNIFICANCE OF ECONOMIC DEVELOPMENT TO THE WITHLACOOCHEE REGION

Economic development is significant to the Withlacoochee Region because it has the potential to improve the lives of the Region's citizens by alleviating economic distress. For example:

A. The Region's Level of Poverty Exceeds the State Level.

In 1990, the Withlacoochee Region had a higher percentage of persons living below the poverty level than the state as a whole (Table 2-48): 13.76% in 1989 compared with 12.70% for Florida. The percentage of persons below poverty also exceeded the state percentage in three of the Region's five counties: Levy (20.70%), Sumter (19.80%), and Marion (14.60%); Citrus and Hernando Counties' percentages were only marginally below the state level (12.60% and 11.00%, respectively). Moreover, the number of impoverished persons in Marion County exceeded the total population of Levy County.

- Economic development could create job training and employment opportunities to help impoverished persons in the Region build more productive lives.

B. The Region Has Chronically High Levels of Unemployment, Especially Among Minorities.

The unemployment problem is discussed in depth in the Unemployment sub-section of this chapter.

- Economic development could lower the unemployment rate by creating jobs and promoting entrepreneurship in the Region. *Economic development programs could create job training and employment opportunities for economically disadvantaged minority group members in the Region.*

C. The Region's Minority Population is Comparable to the Percentage of Minorities in the State.

The Region's Minority Population (Table 2-90) in 1990 was 54,406, or 12.17% of the total population. This is marginally smaller than the figure for the state (13.60%). Marion County had the largest minority population in the region (16.57%). As noted in #2 above, unemployment among minorities in the region is very high.

- Economic development programs could create job training and employment opportunities for economically disadvantaged minority group members in the region.

D. The Region's Income Levels Are Substantially Below State Income Levels.

Income levels in the Region have been substantially below the state average. Per capita incomes (Table 2-40) have increased, but remain well behind the state average. For example, the per capita income in 1989 for Levy County (\$9,386), the lowest in the Region, ranged 56.59% behind the state figure (\$14,698); even Citrus County (\$12,151) which had the highest per capita income in the Region was 20.96% below the state average. Median family incomes (Table 2-41) were also below state levels. Levy County (\$22,743) had the lowest median family income in the Region, a figure which was 41.63% below the state figure (\$32,212); Marion County (\$26,089) which had the highest median family income in the Region was 23.47% below the state.

- Economic development could help to raise incomes over time by attracting higher paying high-tech, high value-added employers into the Region and increasing the manufacturing base, especially in rural areas.

E. The Region Has a High Incidence of Income from Transfer Payments.

Transfer payments are, generally, pension and retirement benefits as well as unemployment benefits. High levels of transfer payments (Table 2-43) tend to promote the Retail Trade and Services sectors of the economy through purchase of goods and services required to maintain daily life. Given the large retired population and chronic high unemployment in the Region, it is not surprising that transfer payments accounted for 26.1% of total personal income in the Region 1990, an increase from 16.7% in 1970. By comparison, transfer payments accounted for only 16.3% of the Florida's total personal income in 1990. Four counties in the Region were among the highest in Florida in percentage of transfer payments: Sumter County was 4th highest in the state, Citrus County was 8th, Hernando County was tied for 12th and Levy County was 15th.

- Economic development could reduce the percentage of transfer payments by increasing the total personal income generated by the private sector, thereby increasing the impact of wealth-creating activities and decreasing the impact of wealth-transferring activities in the Region's economy.

F. The Region's Economy is Dominated by Services and Retail Trade.

The Withlacoochee Region's economy has changed from one dominated by agriculture in the 1950's to one dominated by the Services and Retail Trade Sectors; combined, these accounted for over half of all employment and business establishments in 1990. The Construction Sector is important, but is sensitive to economic downturns; since 1987, residential construction has posted annual decreases. Employment in Health Services grew by almost 700% from 1970 to 1990, reflective of the influx of retirees into the Region during that period.

- Economic development could assist in diversifying the Region's economy to promote increased economic stability, job creation and incomes for the Region. It could do this by fostering the expansion and retention of the existing business base, and by recruiting strategically targeted businesses and industries to come into the Region. Bolstering natural resource-based activities such as eco-tourism, agriculture, forestry, shellfishing and mining would also strengthen and diversify the economy.

G. The Region is Rural in Nature.

Land use in the Region is largely agriculture and forestry with large areas classified as Vacant. However, intensive residential development has occurred in southwestern Marion County and in the central portions of Citrus and central and southwestern Hernando Counties. The vast majority of urbanization has occurred in the three most populous counties, Marion, Hernando and Citrus Counties. Levy and Sumter counties have not experienced the same growth. As a result, Sumter County especially has suffered high unemployment and out-migration, primarily due to the decline of agriculture and the railroad.

- Economic development could help increase the standard of living in rural areas of the Region through job creation, businesses expansion and re-location, infrastructure improvements and training and placement programs.

H. The Region's Population Growth is Projected to Grow Much More Slowly Than the Record Growth Rates of Recent Years.

Particularly troubling are the population projections for the next twenty years: growth is projected at 66.48% (University of Florida) between 1990 and 2010, considerably slower than the 236.51% growth rate experienced between 1970 and 1990--bad news for a Region whose economy is driven by rapid population growth.

- Economic development--through economic diversification--could soften the economic disruptions of the Services, Retail Trade, Construction and Finance/Insurance/Real Estate sectors of the economy if future population growth declines significantly.

IV. REGIONAL RESOURCES, FACILITIES AND SYSTEMS

The Regional Resources, Facilities and Systems identified below have been deemed significant to the Region for economic development under the requirements of Rule 27E-5.002(7) F.A.C.

A. Government Resources

Economic Development District.
State and Federal Economic Development Assistance Providers.

B. Business Resources & Facilities

Economic and Tourism Development Organizations (Public & Private Sector).
Central Business Districts.
Industrial Parks.

C. Employment/Training Facilities

Job Service of Florida.
Withlacoochee Workforce Development Authority.
Mid-Florida Community Service Job Training Center.
Citrus-Hernando Private Industry Council.
Community Colleges, including satellite campuses.
Withlacoochee Technical Institute.
Lake Area Vocational-Technical Center.
County School Systems, including Tech Prep Program.

D. Cultural & Tourism Facilities

Regional Cultural Facilities, e.g., museums, performing arts theaters, public libraries, etc., serving multi-jurisdictional areas.

Cultural and Art Organizations (e.g., Fine Arts for Ocala).

Historical and Archaeological Facilities Listed in the Florida Master Site File, or listed or eligible to be listed on the National Register of Historic Places.

Regional Eco-tourism Facilities serving multi-jurisdictional areas.

Major Commercial Tourist Attractions, e.g., Weeki Wachee Springs, Silver Springs, etc.

State and Federal Forests, Parks and Public Lands.

The Florida Greenway.

E. Transportation Facilities

Airports.

The Regional Highway System.

The Regional Railroad System.

Port Facilities.

F. Other Resources

Prime, Unique and Locally Important Farmlands.

Family Farms.

The Floridan Aquifer.

Sub-regional Water and Wastewater Treatment Facilities.

Natural Gas Transmission Pipelines.

Electric Power Generating Stations.

Electric Transmission Lines of 500KVA.

Electric Transmission Lines of Lesser Voltage Which Serve Multi-County Jurisdictions.

Electric Substations to Support Above Referenced Transmission Line Facilities.

V. RELATIONSHIP TO THE STATE COMPREHENSIVE PLAN

A. Required Legal and Administrative Relationships

According to Chapter 186.507 (1), "regional plans shall be consistent with the state comprehensive plan." Chapter 186.508 (1) requires the Executive Office of the Governor, or its designee, to review the proposed strategic regional policy plan for consistency with the adopted state comprehensive plan. Additionally, state administrative law requires the Strategic Regional Policy Plan "to implement and further the goals and policies of the State Comprehensive Plan with regard to strategic regional subject areas and other components addressed in the plan" (27E-5.003 (1), FAC).

The purpose of this section is to address these requirements in regards to the Economic Development chapter of the Withlacoochee Strategic Regional Policy Plan.

B. Comparison of Economic Development Topic Areas

The State Comprehensive Plan (Chapter 187, F.S.) addresses economic development-related topics in 187.201 (3) Families; (17) Downtown Revitalization; (19) Cultural and Historical Resources; (22) The Economy; (23) Agriculture; (24) Tourism, and (25) Employment.

The Withlacoochee Strategic Regional Policy Plan addresses the following economic development topics: Goal 2.1 Regional Approach to Economic Development; Goal 2.2 Downtown Preservation and Revitalization; Goal 2.3 Improving the Business Climate; Goal 2.4 Employment, Goal 2.5 Job Training; Goal 2.6 Reducing Poverty; Goal 2.7 Agriculture, Goal 2.8 Family Farms; Goal 2.9 Eco-tourism, Goal 2.10 Cultural Resources, Goal 2.11 Siting Economic Development, Goal 2.12, Adequate Infrastructure for Economic Development, Goal 2.13, Appropriate Utilization of Natural Resources for Economic Development, Goal 2.14, Local Assessment of Local Natural Resources and Future Needs, and Goal 2.15 Strengthening the Family Unit.

C. Furtherance of State Goals by the Withlacoochee Strategic Regional Policy Plan

<u>State Goal</u>	<u>Furthered by Regional Goal/Policy</u>
187.201 (3)	Goal 2.15, Policies 2.15.1--2.15.7
187.201 (17)	Goal 2.2, Policies 2.2.1--2.2.5
187.201 (19)	Goal 2.10, Policies 2.10.1--2.10.7
187.201 (22)	Goal 2.3, Policies 2.3.1--2.3.11
187.201 (23)	Goals 2.7, 2.8; Policies 2.7.1--2.7.8; 2.8.1-2.8.5
187.201 (24)	Goal 2.9, Policies 2.9.1--2.9.5
187.201 (25)	Goals 2.4, 2.5; Policies 2.4.1--2.4.13; 2.5.1--2.5.6

D. Inclusion of State Goals/Policies in the Withlacoochee Strategic Policy Plan

Goals and policies taken from the State Comprehensive Plan that have been included in whole or in part in the Economic Development chapter of the Withlacoochee Strategic Regional Policy Plan include:

<u>State Goal/Policy</u>	<u>Withlacoochee Goal/Policy</u>
Goal (22) (a)	Goal 2.3
Goal (25) (a)	Goal 2.4
Policy (22) (b) 1	Policy 2.3.1
Policy (22) (b) 2 (partial)	Policies 2.3.2 & 2.3.6
Policy (22) (b) 3 (partial)	Policy 2.3.3
Policy (22) (b) 5 (partial)	Policy 2.3.8
Policy (22) (b) 6	Policy 2.3.7
Policy (22) (b) 8	Policy 2.6.3

Policy (22) (b) 9	Policy 2.5.5
Policy (22) (b) 10	Policy 2.4.7
Policy (22) (b) 11 (partial)	Policy 2.4.6
Policy (23) (b) 1 (partial)	Goal 2.7
Policy (23) (b) 2	Policy 2.7.7
Policy (23) (b) 6	Policy 2.8.4
Policy (23) (b) 11 (partial)	Policy 2.7.4
Policy (23) (b) 12	Policy 2.7.5
Policy (25) (b) 2 (partial)	Policy 2.4.1
Policy (25) (b) 3 (partial)	Policy 2.4.11
Policy (25) (b) 4 (partial)	Policy 2.4.2
Policy (25) (b) 5	Policy 2.4.13
Policy (25) (b) 7 (partial)	Policy 2.4.10
Policy (25) (b) 8	Policy 2.4.8
Policy (25) (b) 9 (partial)	Policy 2.4.12

VI. FORECAST OF FUTURE CONDITIONS

A. Projected Growth

Growth in the Withlacoochee Region is projected to continue faster than the state, but less rapidly than in recent years. This is potentially bad news for a Region whose Services and Retail Trade driven economy needs rapid population growth to sustain economic growth. Population forecasts from the Bureau of Business and Economic Research at the University of Florida are presented in Table 2-26. The Region's population is expected to increase by 34.37% by the year 2000, while Florida's population is expected to increase by 20.37%. The Region's population is forecast to grow by 66.48% from 1990 to 2010, while state growth is projected at 38.89%. The bulk of the growth is forecast to occur from 1990 to 2000, then slow down early in the new century. The Region will continue to contain a minuscule percent of the overall state population--3.86% in 2000 and 4.14% in 2010. Hernando County is projected to be the fastest growing county in the Region with growth of 90.57% by 2010. Marion County will remain the most populous county and is expected to account for 42.25% of the Region's population in 2010. Growth in Sumter and Levy Counties is expected to be slow.

B. Assumptions

For the purposes of this plan, the basic assumption has been made that the projected growth described above will occur at least through the turn of the century. Other assumptions include:

- Continued in-migration of new residents from other parts of Florida and from other parts of the United States, but at a slower rate than occurred between 1970 and 1990.
- Continued influx of retirees, especially into Hernando, Marion and Citrus Counties.
- Continued development of large scale housing developments in rural areas, notably along State Road 200 in southwest Marion County and in the central portions of Citrus County and central and southwestern Hernando County, but less rapidly than occurred between 1970 and 1990.
- The economy will grow at a pace comparable to population growth; the dominance by Retail Trade and Services sectors will intensify.
- Unemployment will continue to exceed state levels.
- Housing starts will rebound from the slump experienced since 1987, but not to the record pace of the mid-1980's.
- Water will not be transferred to jurisdictions outside the Region for supply purposes.
- Problems with coliform contamination of aquatic and marine resources will continue as long as there is inadequate wastewater treatment infrastructure in the Region. It is assumed that adverse impacts on the Region's natural resources will increase.
- The commercial fishing net ban is expected to effectively shut down commercial fishing as it previously existed; however, shellfishing has the potential to expand due to training programs such as Projects OCEAN and WAVE.
- Environmental permitting requirements will become more restrictive.
- Lack of local funding will continue to hamper economic development efforts at the local level.
- The Withlacoochee Region will continue to consist of Citrus, Hernando, Levy, Marion and Sumter Counties, and be served by the Withlacoochee Regional Planning Council.

VII. PROBLEMS, NEEDS & OPPORTUNITIES ASSOCIATED WITH GROWTH & DEVELOPMENT

A. Evaluation of the Withlacoochee Region

1. Symptoms of Economic Distress

The following symptoms of economic distress in the Withlacoochee Region are summarized from the findings of the analytical sections in this Plan. Covering the period 1970 to 1990, they are presented here to bring the Region's economic problems into sharp focus.

- a. The Region is plagued by chronic, high unemployment, especially among young people and minorities. Because the civilian labor force is growing faster than employment, there is "built-in" unemployment with too many people competing for too few jobs.
- b. The Services and Retail Trade sectors dominate the Region's economy making it susceptible to economic disruptions such as recessions, shortages, high interest rates, etc.

- c. Although average wages and incomes have increased from 1970 levels, wages are considerably below state levels.
- d. Private sector earnings are no longer the primary source of personal income; over one-quarter of total personal income is derived from transfer payments.
- e. The number persons living in poverty almost doubled between 1969 and 1989, but declined as a percentage of total population because of the in-migration of more affluent persons.
- f. The Region is dependent on population growth for growth and development; population growth is forecast to occur at much slower rates than the record increases of recent years.
- g. The Region is sparsely populated and largely vacant, containing only a minuscule percentage of the total state population.
- h. The low density of population makes infrastructure improvements and maintenance more costly per capita, and negative impacts on natural systems more likely, since more linear feet of pipe and pavement are required to connect business centers. The availability of an infrastructure that spans great distances often leads to irresistible opportunities to develop in sprawling patterns which in turn makes transportation operational costs higher.
- i. The death rate exceeds the birth rate; in-migration is only source of net population growth.
- j. The Region has a higher percentage of elderly persons but a lower percentage of children than the state.
- k. Educational attainment lags behind the state.
- l. Central business districts have been declining for the past generation.

Source: OEDP, Chapter 12, p. 12-1.

2. Positive Locational Aspects for Economic Development

Although greatly distressed, the Withlacoochee Region has much potential for economic development. This section discusses the positive locational assets for economic development in the Region.

a. Abundant Natural Resources.

The Region's natural resources offer opportunities for economic development activities (see Natural Resources chapter). These include forests; rivers, lakes, springs and the Gulf of Mexico; crop and pasture lands, and mineral resources. Indeed, the earliest economic development was based upon agriculture, fishing, forestry and mining. Since approximately 1950, other sectors of the economy, notably Retail Trade and Services, have eclipsed natural resource-based activities. However, because the Region is still predominately rural, natural resource-based activities have great potential for future economic development. In agriculture these range from farming to cattle to multi-disciplinary activities which could combine farming, aquaculture and food processing. Silviculture, although requiring many years and much land, is an excellent option, especially for remote, sparsely populated areas. Shellfishing could be enhanced through

training programs such as the Harbor Branch Oceanographic Institute's Projects OCEAN and WAVE as well as marine resources management and expanded inland wastewater treatment facilities to reduce coliform contamination. Mining, sometimes controversial because of conflicts with adjacent land uses and environmental concerns, can be an acceptable activity if carried out appropriately. The Region's natural resources also offer opportunities for eco-tourism and recreational industries serving campers, boaters, hunters and fishermen, water sports, etc.

Constraints to natural resource-based economic development are often regulatory. Many of these constraints, such as the constitutional fishing-net ban, may cause a devastating short-term economic bust for natural resource dependant industries. However, regulatory or voluntary resource management controls, long or short term, are designed to ensure the sustainability of natural resources and associated industries.

b. Rural Region.

The rural nature of the Region draws most new residents here to escape city life. Because of its size and large percentage of vacant land, the Region has ample space for residential, business and industrial uses if undertaken with prior planning for infrastructure and land use compatibility.

c. Abundant Water Resources.

Abundant ground and surface waters are perhaps the Region's most precious natural asset and have been considered as a source of water supply for the Tampa Bay Region. Although the transfer of water from the Withlacoochee Region has thus far been prevented by the Southwest Florida Water Management District's "local sources first" policies, this situation could change at any time, based on a prioritization of "available" potable water sources and perceived state needs. The withdrawal of water for local, regional or out-of-region use has the potential to alter the region's hydrologic cycle thereby causing permanent ecological damage and economic disruption in affected areas. Furthermore, until Florida's Water Management Districts address the lack of knowledge about sustainable flows and levels through Minimum Flows and Levels Studies and WRAP (Water Resource Assessment Project) reports for the Withlacoochee region, there will continue to be uncertainty as to the maximum withdrawal possible without damaging ecological systems. The Region's water supply will be a positive locational aspect only as long as it is utilized locally.

d. Access to Primary Federal and State Highways.

The Region is traversed by Interstate 75 and contains the northern terminus of Florida's Turnpike (see Transportation chapter). Because several major federal and state highways pass through the Region (and the City of Ocala) it is a natural transportation hub. The proposed Northern Extension of the Florida Turnpike (Sumter, Marion, Levy) and the Suncoast Parkway (Hernando and Citrus), if completed in the near future, will increase access to the region and will potentially increase transportation-related activities include trucking, truck stops, and warehouse and distribution centers.

e. Adequate Regional Highway System.

The regional highway network (see Transportation chapter) is generally adequate with major exceptions such as the State Road 200 in southwest Marion County, State Road 50 in Hernando County and US 41 in Citrus County which are congested due to rapid, sprawling development in previously rural areas. Access to points within the Region is

relatively direct. This offers the possibility of sites for expansion to existing businesses to provide their goods and services to other localities in the Region. It also provides access to regional shopping malls to residents from outlying areas. A major constraint to development along the regional highway system that it encourages urban sprawl and traffic congestion.

f. Existing Business and Industrial Base.

While many economic development strategies involve industrial recruitment efforts to bring new businesses and industries into the Region, the existing business base is itself an asset for economic development. Existing businesses are run by owners and managers already familiar with the intricacies of operating a business in the Region's business climate. They are usually knowledgeable of the existing business regulations, taxation, educational system, financial institutions, competitors, suppliers, etc. Facilitating the survival and expansion of local businesses is one way to maximize the existing business base. Constraints include the reluctance of some business owners to "help" other businesses; reluctance to accept assistance from the public sector; lack of economic development programs to assist existing businesses and lack of funding to implement assistance programs.

g. Growing Health Care Services.

The influx of new residents and especially retirees has generated tremendous growth in the Region's health care system triggering new career opportunities. A constraint to the future development of health care services in the Region could come from whatever reforms to the health care system are eventually imposed on private sector health care providers by the state and federal government.

h. Existing Economic Development Agencies.

The existing network of economic development organizations in the Region is an asset for economic development. (See section II.A.1-4, above.)

i. Economic Development District.

The Withlacoochee Region was designated as an Economic Development District by the U.S. Economic Development Administration in April, 1995. An Economic Development District is a designation available only to regional entities that have completed the prescribed Overall Economic Development Planning process and prepared an Overall Economic Development Plan to guide the activities of Economic Development District. The District offers special considerations for obtaining grants from the Economic Development Administration to fund economic development projects and serves as a federally funded vehicle for addressing economic development issues and fostering a regional approach to economic development planning. A listing of EDA grants awarded in recent years within the Withlacoochee Region appears in Table 2-86 in Appendix B.

A potential constraint to the Economic Development District is the uncertain future of continued funding for the U.S. Economic Development Administration because of political changes in Congress.

j. Available Labor Pool.

Because the Region has an historically high rate of unemployment, there is an existing labor pool that could be employed by economic development projects and expanding or

relocating industries and businesses. However, the existing labor pool may not have the skills needed for high-tech industries. New job training programs would increase the value of the existing labor force as a locational asset for economic development.

k. Available Affordable Housing.

Housing is available in sufficient quantities, choices and affordability to meet the needs of workers coming into the Region for employment at industries or businesses relocating here (see Affordable Housing chapter). Increased interest rates on mortgages could be a constraint to relocating workers. Housing costs in the Region are substantially less expensive than for the state as a whole.

l. Ample Energy Supply.

The presence of a major electric generating facility (the Florida Power Corporation Energy Park near Crystal River) in the Region ensures ample electric power for economic development activities. The construction of a natural gas pipeline through the Region will make natural gas available to outlying areas and enhance the potential for natural gas-dependent industries.

m. Temperate Climate.

The Region's temperate climate attracts tourists and residents and promotes the annual in-migration of "snowbirds" or seasonal winter residents seeking to escape the harsh northern climate. On the other hand, the Region's climate can constrain economic activities through droughts that can hamper agricultural operations and severe seasonal storms and hurricanes that can destroy or disrupt businesses, especially in coastal areas.

3. Negative Locational Aspects for Economic Development

The following section presents a discussion of the conditions that impose constraints on economic development.

a. Lack of Infrastructure.

This limitation is discussed in general terms in the Natural Resources chapter as are the environmental consequences of development with inadequate infrastructure. The lack of infrastructure is one of the greatest impediments to economic development in the Region, especially for industrial projects.

b. Educational Levels.

Educational levels of adults in the Region lag considerably behind state levels. Remediation of this situation will require coordination between economic development officials, industry, educators and job service providers to provide additional job training and vocational programs.

c. Lack of Commercial Airline Service.

The lack of commercial airline passenger and cargo service in the Region is a constraint to economic development and tourism. The presence of several general aviation airfields offers opportunities for aviation and industrial development activity centers.

d. Lack of Funding for Economic Development Planning & Program Implementation.

A primary constraint to economic development is lack of funding for program planning and implementation. Many smaller organizations rely on volunteer staffing and dues from members to fund routine activities. Some larger organizations receive funding

assistance from county and municipal governments, while those counties operating economic development departments provide limited funding from county revenues.

e. Lack of Funding for Economic Development Projects.

This constraint should be alleviated by the advantages that the Economic Development District will offer member governments for obtaining EDA funding. The eventual initiation of a revolving loan fund by the District could make venture capital available for start-up and expansion of eligible businesses. The establishment of a regional financial assistance clearinghouse for economic development grant and loan information would assist the economic development community in learning about available state, federal and private programs.

f. Limited Industrial Sites.

Economic development officials cite the limited number of industrial parks and sites in the Region (OEDP: Economic Needs Questionnaire), especially in Levy and Sumter Counties, as a constraint to development. The Region's small industrial base and lack of adequate infrastructure are reasons for the limited number of industrial parks and sites in the Region and partially explains why most existing sites are associated with urbanized areas with existing municipal services. Lack of industrial sites is a significant constraint to future industrial development and diversification.

g. Limited Cultural Opportunities.

While recreation in the Region is largely outdoors, other pursuits such as professional and collegiate sports, major concerts, performances by theatrical stars, etc. are not generally available except to those willing and/or able to drive to Gainesville, Orlando, etc. This is due, in part, to the sparsely populated rural nature of the Region, prevalence of small towns and general lack of significant media. This is a constraint to economic development because lack of cultural amenities lessens the Region's appeal to employers considering relocation here. However, this limitation could slowly correct itself over time as growth occurs and creates a demand for more cultural, sporting and intellectual amenities.

h. Growth Patterns Conducive to Services and Retail Trade Growth.

The rural nature of the Region attracts new residents, generally retired, seeking a quiet lifestyle with access to adequate shopping and services. Retirement-oriented growth is an impediment to economic diversification since it typically does not encourage the business climate, infrastructure and capital needed to stimulate industrial growth. Instead, the in-migration of retirees and their demand for goods and services has made Services and Retail Trade the dominant sectors of the Region's economy.

i. Regulatory Agencies/Environmental Permitting.

The complex permitting processes at the federal, state and local levels have the potential to constrain some types of economic development. However, there is little local governments can do other than simplifying their own permitting processes since most environmental regulations are imposed by federal and state law and enforced by federal and state agencies. Most of these agencies, however, are obligated under federal and state laws to provide analysis of and minimize the economic impacts of regulatory initiatives.

4. Economic Needs

The following needs have been identified from the foregoing analyses.

a. Expanded Infrastructure.

The Natural Resources and Transportation chapters document the level of urban-type public infrastructure within the Region. Because of the Region's rural nature, these services are concentrated in urbanized areas. The level of water and wastewater treatment infrastructure in the Region is below state averages. In order to maximize economic development that is environmentally compatible, the Region needs expanded public infrastructure in planned, compact areas to discourage urban sprawl.

b. More Industrial Sites.

Economic development officials cited the need for more industrial sites in the Region (OEDP: Economic Needs Survey). Existing industries need sites for expansion and incoming industries need sites to locate; these sites must have adequate infrastructure and be placed in appropriate locations such as industrial parks. Additionally, incubator buildings are needed to foster new business development. A need for additional warehouse facilities was also noted.

c. Increased Labor Force Skills and Training Programs.

Data in the Labor Force section indicate that educational levels of adults in the Region are much lower than those of the state. Economic development officials also cited the low skill level of the labor force as a need for economic development (OEDP: Economic Needs Survey). The enhancement of the technical skills of the civilian labor force would enhance employability and be a valuable asset for promoting the expansion of existing industries and recruiting of others into the Region.

d. Commercial Airline Service/Airfield Development.

Lack of commercial airline service limits opportunities for tourism, air cargo service and aviation-related economic development activities. Existing general aviation airfields should be utilized for economic development activities. Many already have associated industrial parks and could also be used for foreign trade zones and business incubator locations.

e. Financing for Economic Development Projects.

Funding sources--both public and private--are needed to carry out economic development projects such as infrastructure expansion, job training programs, small business loans, economic development planning, etc. The lack of funding has killed the effectiveness of previous economic development planning projects at the regional level. The establishment of the Economic Development District could facilitate access to funding for the implementation of economic development projects in the Region.

f. Career Opportunities.

Few career opportunities (well paying jobs with good benefits and career tracks) exist for "blue-collar" workers within the Region due to its domination by Services and Retail Trade. Career opportunities are largely driven by level of education, work experience and availability of suitable employers. Expanding the Manufacturing base would tend to promote career tracks for technically proficient workers (increasing the need for job

training/retraining programs). Other sectors offering the potential for career opportunities include health care, finance, insurance and real estate.

g. Higher Wages.

The Region needs higher wages and income, especially in more rural areas. Wage and income data reveal that in spite of large percentage increases over the past 20 years, wages and incomes are still significantly lower than the state average. Although low wages are reflective of the Region's rural nature and relatively low cost of living, they are also indicative of the Services and Retail orientation of the regional economy since these sectors generally pay at or near the minimum wage. An increase in the Manufacturing base would tend to promote higher incomes since these types of positions generally pay higher wages than the Retail Trade and Services sectors.

h. A More Diversified Economy.

Business and employment patterns indicate that more than half of the Region's employment and business establishments are engaged in Services or Retail Trade activities. A more diverse economy would tend to make the Region less vulnerable to economic disruptions caused by Recessions and the inevitable slowdown of population growth due to in-migration. A larger Manufacturing base would tend to create well paying jobs and import new capital into the Region rather than merely circulating existing dollars as do the Services and Retail Trade sectors (except, generally, tourist activities which also import new dollars). Economic development officials should also consider promoting wealth-creating natural resource-based activities that were once the Region's economic strengths: agriculture, forestry, mining and fishing (although the latter faces disruption from the fishing net ban). The resources already exist in abundance, and through proper management and husbandry, could be productive for generations.

B. Opportunities and Strategies for Economic Development

The statement of goals and policies below is not necessarily sufficient, in and of itself, to improve the Region's economy. A Regional overall economic development strategy must also be presented that defines the approach necessary to work toward implementation of the Plan's goals and policies. Given the Region's history of lagging behind the state and nation in economic indicators, these strategies will be results orientated, focusing on improving both the short and long term economic health of the Region.

A major opportunity for furthering the Region's economic strategies has been realized with recent, 1995, federal regional designation (Economic Development Administration) as an Economic Development District. As a condition of full designation, the Region produced an Overall Economic Development Plan. The OEDP is an excellent source of past and present Regional economic conditions. In addition, the OEDP outlines goals, strategies, objectives, and courses of action for both short and long term Regional economic improvement.

As a result of support and participation in the Economic Development District the Region's counties, cities, and general citizenry are eligible to benefit from a number of federal grant and loan programs administered by the Economic Development Administration. EDA's grant programs include the following: Public Works and Facilities Program, Local Technical Assistance, University Center Technical Assistance, National Technical Assistance, Research and Evaluation and Planning, Economic Development Districts Planning Grants, American Indian Tribes Planning Grant, Redevelopment Areas Economic Development Planning Grant, State and Urban Economic Development Planning Grant and Economic Adjustment Program. The federal share of these awards range from 50% to 100%, dependant on a wide array of economic conditions in a particular region.

Another EDA program that many Economic Development Districts participate in is the Revolving Loan Program. After the initial EDA award amount, the program is designed to be a self-perpetuating loan entity providing the capital for expansion and job creation that many regions lack.

The following strategies address the basic economic problems that must be alleviated for economic recovery. The areas selected are interdependent and synergistic. For example, increasing the skills of the labor force (Strategy 4D) could attract new opportunities for industrial development and recruitment (Strategy 1A) which could help to expand and diversify the existing business base (Strategy 3C) and provide new tax revenues to help local governments develop new infrastructure (Strategy 2B). It should be noted that all of the following strategies are intended to create jobs and economic opportunities for the people of the Withlacoochee Region. These strategies can be utilized by economic development organizations and local governments to facilitate a coordinated approach for economic development in the Region. Facilitation by agencies external to the WRPC includes such roles as technical assistance, education, regulatory, funding and program development and administration.

1. Industrial Development and Recruitment

The quickest way to raise the economic status of the workers is to opportunistically attract new jobs through innovative recruitment and incentive programs. Ideally, the best types of jobs to attract are high wage, high value-added jobs in environmentally compatible high tech manufacturing industries. The Region must aid in the promotion and expansion of these high-tech industries that have far-reaching positive affects upon the absolute regional economy. As indicated in the Trends and Conditions portion of this chapter, the Region has a small but relatively diverse manufacturing base on which to build. However, significant industrial development is problematic given the Region's general lack of infrastructure and industrial sites with municipal services. It should be the short-term strategy of economic development officials to opportunistically attract/recruit ANY suitable industry that is environmentally compatible and pays wages at or above the corresponding state wage; they should also aggressively pursue assistance programs that would promote the expansion of environmentally compatible infrastructure for commercial and industrial sites. Incentive programs to help attract industries should also be considered by local governments. Officials should also continue to utilize the region's airfields for associated industrial development.

2. Development of Community Facilities and Infrastructure

The availability of community facilities and infrastructure is an important factor in the decision of an industry to come into a specific area. The location must be suitable for both the industry and its employees who may have to relocate with their families. Consequently, local governments need to plan and work for upgrading community facilities, infrastructure, human services and amenities that would improve their locational aspects for economic development. These include central water and sewer systems; airport, street and highway improvements; parks, recreation and cultural facilities, and schools and vocational training centers.

3. Expand the Existing Business Base

It is axiomatic of economic development that the best opportunities for creating jobs exist in your own back yard, i.e., the existing local business and industrial base. A basic strategy must be fostering its expansion and growth. Employment service-providers and educational institutions should continue to work with local businesses and industries to develop programs that specifically cater to local expansion and diversification needs. These could include seminars and short courses in business planning and financing; customized employee training programs; intern programs, etc. Chambers of commerce and economic development councils could also provide important services and programs for business expansion. Financial assistance for eligible firms is often available from agencies such as the Small Business

Administration. The Economic Development District will establish a regional clearinghouse to provide information about loan and grant assistance programs for economic development projects.

4. Increase the Skills of the Labor Pool

High-wage, high value-added jobs require highly skilled workers, and industries usually require that these skills be available before they relocate. Data presented previously in this document indicate the educational level of the Region's population is below that of the state. Consequently, the Region has become attractive to low wage paying businesses and industries that require relatively unskilled labor. Therefore, most industrial employment in the Region is low skill and low wage. Because the majority of workers who will constitute much of the Region's labor force early in the new century are already employed, innovative on-the-job programs must be offered to help them upgrade their skills with minimal interruption of attendance at their existing jobs. Upgraded skills will in turn give them a better chance to qualify for the better paying jobs that will inevitably come with a coordinated, regional approach to economic development. The skills of the unemployed, especially young people and economically challenged minorities should be upgraded through innovative vocational training programs followed by the opportunity for meaningful employment. Increasing labor skills will require regional partnerships among existing job training service-providers, the county school boards, local governments, economic development agencies and private sector employers.

5. Promote the Development of Eco-Tourism

The Region has great potential for increased tourism. The natural resources of the Region make it ideal for outdoor sports and recreation activities. These assets should be systematically analyzed and a program of promotion and tourism development planning undertaken to maximize employment opportunities that utilize the Region's environmental assets for eco-tourism.

The benefits of a viable eco-tourism sector to a regional economy are many fold. If managed wisely, the natural resources which provide the basis for eco-tourism can be an inexhaustible revenue generator. These eco-tourism revenues, of which a high proportion may originate from outside the region, are visible in both the private sector; typically through service providers, and the public sector; in the form of sales tax revenue and usage fees. Regional tourism related employment opportunities would rise in concert with an ever increasing number of tourists requiring service operations. While some of these new jobs might have a lower than average pay scale, tourism derived positions often afford the flexibility that part-time employment seekers, students, and retirees require.

6. Strengthen the Family Unit

The disintegration of the family unit is viewed by many as the underlying cause of the educational results that in turn cause workforce preparedness deficits. Related negative conditions of family breakdown include poverty, hunger, malnutrition, chronic health conditions, school failure, runaways, juvenile delinquency, substance abuse, teenage pregnancy, unemployment, emotional disturbance and adolescent suicide. Countless public and private programs exist to address the beforementioned symptomatic conditions of a failing family structure. Many of these problems and programs may be greatly reduced if a positive environment for the development and nourishment of the family unit is fostered. Achieving this end result will call upon an increase in policy development and public financial commitment to strengthening the family unit, through the leadership and vision of elected officials, and a rethinking of the relationship between governmental aid and governmental dependency and individual accountability.

VIII. ECONOMIC DEVELOPMENT GOALS, POLICIES, AND INDICATORS

A. PROMOTION OF A REGIONAL APPROACH TO ECONOMIC DEVELOPMENT AND TOURISM

Goal 2.1 Foster a regional approach to marketing, promotion and planning activities for economic development and tourism.

Policy 2.1.1 The federal Economic Development District (designated by the U.S. Economic Development Administration) is the Withlacoochee Region's primary vehicle for fostering a regional approach to economic development.

Policy 2.1.2 The regional planning council shall utilize the Economic Development District to establish a regional clearinghouse for information about the availability of grants and other funding sources for economic development projects.

Policy 2.1.3 The regional planning council shall utilize the Economic Development District to provide data, facilitation and technical assistance to local governments, new and existing businesses, and economic development and tourism agencies.

Policy 2.1.4 The regional planning council shall utilize the Economic Development District to encourage networking among economic development officials in the region, and the creation of public and private sector partnerships to address general and specific economic development and tourism issues and projects.

Policy 2.1.5 The regional planning council shall utilize the Economic Development District and other economic development entities to address issues related to assisting and strengthening the existing business base (e.g. business planning, downtown redevelopment, infrastructure expansion, technical assistance, etc.).

Policy 2.1.6 The regional planning council shall utilize the Economic Development District as a vehicle for applying for grants from the U.S. Economic Development Administration for eligible and appropriate economic development projects.

Policy 2.1.7 The regional planning council shall establish a public information program for the Economic Development District to foster regional awareness of economic development and tourism issues and projects and disseminate information about assistance programs.

Policy 2.1.8 The Region shall seek alternative sources to continue the set policies, goals, and mission in the furtherance of economic development, should federal funding and designation for the Economic Development District cease to exist.

Note: Implementation of Goal 1.1 and Policies 1.1.1 through 1.1.7 is contingent upon receipt of federal funding for the Economic Development District.

Indicators: (A) Utilization of Economic Development District.
(B) Participation in Economic Development District activities by local governments and economic development organizations.

B. DOWNTOWN PRESERVATION AND REVITALIZATION

Goal 2.2 To preserve and revitalize downtown areas as centers of economic activity in the region's municipalities.

- Policy 2.2.1 Assist local governments in the preparation of community redevelopment plans and optional economic development elements of local comprehensive plans.
- Policy 2.2.2 Inform local governments as to the availability of funding and the requirements of the various programs and tax credits and incentives for downtown redevelopment, including the rehabilitation of historically significant structures.
- Policy 2.2.3 Involve the private sector and the public with local governments and downtown development organizations in the early stages of the downtown redevelopment planning process, especially prior to the initiation of specific downtown redevelopment projects.
- Policy 2.2.4 Investigate alternatives to tax increment financing of downtown development projects and/or ways to make tax increment financing attractive to private investors.
- Policy 2.2.5 Establish revolving loan programs to assist local governments in financing downtown redevelopment/revitalization projects including infrastructure improvements.
- Indicators: (A) Percent increase in the number of localities with downtown preservation and revitalization programs.
 (B) Increase of number of businesses in downtown districts.
 (C) Increase in job retention rate.
 (D) Decrease in unemployment rate.

C. IMPROVING THE BUSINESS CLIMATE

Goal 2.3 Cultivate an economic climate that provides economic stability, maximizes job opportunities and increases per capita income for the region's residents.

- Policy 2.3.1 Attract new job-producing industries, corporate headquarters, distribution and service centers, regional offices, and research and development facilities to provide quality employment for the residents of the Withlacoochee Region.
- Policy 2.3.2 Increase entrepreneurship and small and minority-owned business start-up by providing technical assistance and working with potential entrepreneurs to facilitate capital formation.
- Policy 2.3.3 Recognize the natural environment (e.g., forests, clean air and water, historic landmarks, etc.) as a primary economic asset in plans and policies, and include economic development programs and strategies to preserve and protect the environment.
- Policy 2.3.4 Provide technical assistance to existing businesses within the region to address their needs and facilitate their continued viability and expansion.
- Policy 2.3.5 Coordinate the economic development activities of local governments, educational institutions, government, economic development organizations, the Economic Development District, public/private sector partnerships and others to aid in the development of a positive business climate.
- Policy 2.3.6 Remove any unnecessary regulatory controls, where there is region wide agreement, that will not compromise the protection of consumers, society and environment.
- Policy 2.3.7 Increase coordinated economic development approaches through partnerships among education, business, industry, agriculture and the arts.

- Policy 2.3.8 Increase film, television, and recording production in the region through promotion, recruitment and facilitation.
- Policy 2.3.9 Provide an Economic Development Element in County Comprehensive Plans.
- Policy 2.3.10 Increase intra-regional cooperation in attraction/expansion of industry dependant upon close proximity to one another or actual co-location.
- Policy 2.3.11 Facilitate the synergistic relationship between manufacturing centers and university researchers.
- Indicators:
- (A) Regional job creation rate that outperforms the relative state job creation rate.
 - (B) Increase in number of businesses.
 - (C) Decrease in overall unemployment.
 - (D) Regional unemployment rate below state unemployment rate.
 - (E) Increase in number of employers that pay at or above the state average.
 - (F) Increase in county per capita income rates that come close to or exceed the per capita income for the state.

D. EMPLOYMENT

Goal 2.4 Increase employment and economic opportunities for the unemployed and economically disadvantaged in the region.

- Policy 2.4.1 Plan job training programs to meet documented labor market needs. Formulate job training programs that not only meet current documented labor market needs but also incorporate forecasted labor market expectations.
- Policy 2.4.2 Create employment opportunities in economically distressed and rural areas of the region through existing federal, state, regional and local programs.
- Policy 2.4.3 Develop interagency coordination and cooperative employment arrangements between employers and job service-providers utilizing education, vocational training and placement to provide productive, permanent employment opportunities resulting in economic self-sufficiency for the unemployed and economically disadvantaged.
- Policy 2.4.4 Use job training programs to address the present and anticipated needs of existing and potential new industries within the region in order to facilitate the continued viability and expansion of existing businesses and the recruitment of new industries.
- Policy 2.4.5 Increase private sector participation in the planning and design of job training programs and curricula by inclusion of the private sector in the formation and update of program goals and policies.
- Policy 2.4.6 Provide quality child day care service for public assistance families and other low income persons who need it in order to work through cooperative public and private partnerships.
- Policy 2.4.7 Provide for nondiscriminatory employment opportunities through enforcement of existing laws.
- Policy 2.4.8 Utilize innovative arrangements such as onsite day care facilities and flexible hours of employment to increase the access of working parents to the job market.

- Policy 2.4.9 Utilize programs and incentives that open job markets to disadvantaged persons and minorities.
- Policy 2.4.10 Assist students in making informed career decisions by means of a cooperative effort between county school districts, job service providers and economic development agencies.
- Policy 2.4.11 Increase, if funding allows, training and job placement assistance for hard-to-employ groups encountering special barriers including but not limited to: the physically handicapped; transportation disadvantaged; mentally retarded; non-English speaking; and the illiterate.
- Policy 2.4.12 Include training programs in schools that provide each student with lifetime employment skills, including the ability to communicate, compute, and think critically.
- Policy 2.4.13 Plan and design transportation facilities that provide maximum access to jobs and markets.
- Indicators:
- (A) Regional unemployment rate below that of the state.
 - (B) County unemployment rates below that of the state.
 - (C) Progress toward decreasing the percentage of economically disadvantaged residents in the region's labor market below the comparable state rate.

E. JOB TRAINING

Goal 2.5 Realize maximum effectiveness from job training programs.

- Policy 2.5.1 Target new and expanding businesses for on-the-job training, customized training programs and Job Service of Florida recruiting agreements through existing economic development agencies.
- Policy 2.5.2 Provide incentive for industries and businesses seeking public financial assistance for expansion/job creation to utilize workers trained through the region's job training service providers by making such action a high priority for any such award.
- Policy 2.5.3 Require school districts, vocational-technical centers and community colleges to coordinate with the region's job training service providers to assure that secondary and post-secondary schools offer educational and vocational training consistent with the needs of the region's job market.
- Policy 2.5.4 Strategize marketing efforts to increase local business awareness of the variety of services available to employers from job training providers.
- Policy 2.5.5 Facilitate cooperative employment arrangements between private employers and public sector employment efforts to promote productive, permanent employment opportunities for public assistance recipients through the provision of educational opportunities, tax incentives, and employment training.
- Policy 2.5.6 Minimize duplication and maximize efficiency of job service providers by keeping open lines of communication between said providers and periodic evaluations from the appropriate regulatory body.
- Indicators:
- (A) Increase in labor market penetration rate to a rate that outperforms the state.
 - (B) Percent increase in individuals placed into jobs as a result of employment and training activities at a rate that outperforms the relative rate for the state.

(C) Degree of cooperation among job service providers and educational institutions.

F. INCREASING INCOME LEVEL AND REDUCING POVERTY

Goal 2.6 To achieve a per capita personal income for each county in the region that equals or exceeds the per capita personal income figure for the state while reducing the region's poverty rate so that it is less than the average state poverty rate.

Policy 2.6.1 Target and recruit new industries that pay wages and salaries at or above the state average for like industries.

Policy 2.6.2 Build upon the existing relationships among economic development agencies, local Job Training Partnership Act programs, Job Service of Florida, Department of Education Industry Services, Tech-Prep, Economic Development District and other programs to facilitate new employment opportunities with higher income levels.

Policy 2.6.3 Increase economic self-sufficiency through training and educational programs which result in productive employment for those who need to work.

Indicators: (A) Reduction in the gap between the per capita personal income figures for each county in the region and the state's per capita personal income.
(B) Reduce the poverty rate in the region's member counties so that it is less than the average state poverty rate in each.

G. MAINTAINING AN AGRICULTURAL SECTOR

Goal 2.7 Reduce the amount of agriculturally valuable land converted to other land uses without imposing permanent restrictions on its conversion.

Policy 2.7.1 Identify, classify, and map the prime, unique, and locally important farmlands of the Region through utilization of governmental and private sector resources.

Policy 2.7.2 Maintain land adjacent to agricultural areas in uses that are compatible with agricultural activities through comprehensive plans and land development regulations.

Policy 2.7.3 Set forth and expand upon capital improvements programs and land use policies that promote compact growth to minimize urban sprawl into agricultural areas.

Policy 2.7.4 Establish financial incentives carried out through federal and state governments in addition to the Greenbelt Law for protection of the agricultural base.

Policy 2.7.5 Plan road and rail transportation systems with adequate facilities for the economical transport of agricultural products and supplies between producing areas and markets.

Policy 2.7.6 Increase public awareness of the difficulties of farming in an urbanizing society and the benefits lost when farms and farmland are overtaken by urban sprawl.

Policy 2.7.7 Diversify agricultural economies, especially to reduce the vulnerability of areas that are largely reliant upon agriculture for either income or employment.

Policy 2.7.8 The Withlacoochee Regional Planning Council has mapped Natural Resources of Regional Significance as part of its Strategic Regional Policy Plan. The WRPC SRPP Natural Resources of Regional Significance map series shall not be used to affect agricultural operations (including silviculture) so long as the lands continue to be designated and used for agricultural purposes and used in compliance with the applicable

best management practices and restrictions related to endangered and threatened species, and species of special concern. If any of these lands are proposed for redesignation to any other land use category or subject to a plan amendment, development of a Development of Regional Impact, or action requiring intergovernmental coordination review (pursuant to Presidential Executive Order 12372 and Governor's Executive Order 83-150), the proposed action will be evaluated by the WRPC for consistency with the Strategic Regional Policy Plan pursuant to Subsections 163.3184(4) and (5), 186.507(8), and Chapter 380, F.S. The above policy statement does not affect the definition of development in Chapters 163 and 380, F.S., nor the ability of local governments to regulate, restrict, or develop policies relating to agriculture (including silviculture) consistent with law.

- Indicators:
- (A) Decrease in percent of agricultural land converted to other uses.
 - (B) Increase in number of agriculture-related businesses.
 - (C) Increase in policies, programs and incentives promoting the preservation and expansion of agriculture.

H. FAMILY FARM SURVIVAL AND EXPANSION

Goal 2.8 Increase farm income to promote the survival and growth of the family farm.

- Policy 2.8.1 Convert former citrus and pasture lands to alternative crops where practical substitutes can be identified.
- Policy 2.8.2 Secure expanded market opportunities (e.g., farmers markets) for local producers.
- Policy 2.8.3 Maximize efforts to increase supplemental off-farm employment for farmers through innovative partnerships between the agricultural community and non-agricultural sector.
- Policy 2.8.4 Increase entrepreneurship in the agricultural sector by providing technical and informational assistance.
- Policy 2.8.5 Recognize family operated farms as a regionally important industry and include the importance of sustaining prime agricultural land in the region's educational curriculum, similar to the current emphasis placed upon the preservation of the rainforest.

- Indicators:
- (A) Percent increase in farm family income.
 - (B) Expansion of opportunities for increasing the profitability of agricultural.

I. PROMOTION OF ECO-TOURISM

Goal 2.9 Tourism directed primarily towards eco-tourism.

- Policy 2.9.1 Assist in a coordinated, regional program of natural resource-based tourist related activities and facilities (campgrounds, nature and bike paths, interpretive trails, docks, parks, etc.) in appropriate areas in a manner consistent with environmental protection.
- Policy 2.9.2 Build upon a multi-disciplinary approach to eco-tourism that allows for the enjoyment of the environment (e.g., rivers, springs, lakes, forests, etc.), historical/archeological resources (e.g. historical sites, museums, exhibits, historical districts, etc.) and cultural programs (e.g. performing arts centers, concerts, self-enrichment activities, etc.), where appropriate.

- Policy 2.9.3 Acquire public lands suitable for eco-tourism purposes so that this vital economic sector might be preserved for all time.
- Policy 2.9.4 Include environmentally compatible improvements for eco-tourism in local governmental capital improvement plans.
- Policy 2.9.5 Increase environmentally acceptable commercial tourist facilities such as water-parks, theme parks, resorts, etc., when appropriate and compatible with the surrounding land uses.
- Indicators: (A) Increase in tourists utilizing the region's eco-tourism resources.
 (B) Increase in eco-tourism facilities and programs.
 (C) Increase in number and utilization of commercial tourism facilities.

J. ENRICHMENT OF CULTURAL LIFE

Goal 2.10 Enrich the cultural life of the region.

- Policy 2.10.1 Use existing programs to enhance performing arts, visual arts, and cultural appreciation programs at a level commensurate with the region's economic development.
- Policy 2.10.2 Increase and facilitate cooperation among public and private agencies so that cultural resources facilities are taken into consideration in the formulation of capital improvements programs.
- Policy 2.10.3 Increase public awareness and support of cultural resources and events in the region.
- Policy 2.10.4 Analyze and prioritize the need for cultural amenities on a regular basis.
- Policy 2.10.5 Formulate arts councils or citizen advisory boards to advise local governments on cultural development.
- Policy 2.10.6 Plan and finance cultural facilities, events and programs through technical assistance programs and economic incentives that include private sector participation.
- Policy 2.10.7 Identify, evaluate, and protect the archaeological folk heritage and historic resource properties of the region.
- Indicator: Increase in number and utilization of cultural facilities, events and programs.

K. PROPER SITING AND ADEQUATE INFRASTRUCTURE FOR ECONOMIC DEVELOPMENT

Goal 2.11 To promote efficiency and economic productivity from economic development by ensuring that future economic development and transportation projects are properly sited to avoid and/or mitigate adverse impacts to incompatible adjacent land uses.

- Policy 2.11.1 Adopt local policies and procedures which ensure that new economic development and transportation projects are properly sited to avoid and/or mitigate adverse impacts to existing uses and natural resources.
- Policy 2.11.2 Use local comprehensive plans to reserve industrial sites adjoining existing rail corridors for firms requiring rail access.

- Policy 2.11.3 Complement and reinforce state and local government capital improvements programs with infrastructure projects (i.e, water, sewer, drainage and transportation projects) related to economic development.
 - Policy 2.11.4 Utilize an impact analysis system at the local government level similar to the development of regional impact process to evaluate the costs and benefits of attracting development to their respective jurisdictions.
 - Policy 2.11.5 Require economic development projects to be sited in a manner which does not adversely impact resources or facilities of regional significance, does not encourage urban sprawl and in general promotes a functional mix of living, working, shopping and recreational activities through the policies of the local comprehensive plans and criteria of land development regulations, and other regulatory permitting.
- Indicator: Adoption and enforcement of rules or ordinances for the siting of economic development projects.

L. DEVELOPMENT AND MAINTENANCE OF INFRASTRUCTURE

Goal 2.12 To provide for the development and maintenance of adequate infrastructure and resources to support continued economic development in areas identified for growth in the local government comprehensive plans.

- Policy 2.12.1 Coordinate with the Florida Department of Transportation (FDOT) in the development of policies that maintain adequate regional transportation facilities for continued economic development.
 - Policy 2.12.2 Develop policies in that promote the provision and maintenance of adequate water supplies for continued economic development in the Withlacoochee Region.
 - Policy 2.12.3 Develop policies for local comprehensive plans that promote the provision and maintenance of adequate sewer treatment capacity for continued economic development.
 - Policy 2.12.4 Develop policies in local comprehensive plans that maintain adequate solid waste capacity for continued economic development.
 - Policy 2.12.5 Develop policies in local comprehensive plans that maintain adequate drainage capacity for continued economic development.
- Indicator: Adoption and enforcement of policies and ordinances for the provision and maintenance of adequate infrastructure for economic development projects.

M. APPROPRIATE UTILIZATION OF THE REGION'S NATURAL RESOURCES FOR ECONOMIC DEVELOPMENT

Goal 2.13 To appropriately utilize the region's natural resources (air, water, ecological communities, forests, etc.) for economic development.

- Policy 2.13.1 Assess the availability, quality and economic potential of natural resources in local jurisdictions, utilizing the best available information from the federal, state and regional agencies, including the appropriate water management districts.

- Policy 2.13.2 Local governments ought to utilize natural resources within their own jurisdictions before utilizing resources from other jurisdictions.
- Policy 2.13.3 Develop policies in local comprehensive plans that would measure and address the impacts water transfers would have on economic development.
- Policy 2.13.4 Develop policies in local comprehensive plans, that require the utilization of local resources first, including feasible alternative sources such as conservation, reclaimed and/or reused water and desalinated water prior to utilization of resources from outside their County.

N. ASSESSING PRESENT AND FUTURE WATER SUPPLY NEEDS

Goal 2.14 Local government comprehensive plans must assess present and future water supply needs, based upon both existing and future land use maps, and population estimates and projections, until the water management districts complete minimum flows and levels and WRAP (Water Resource Assessment Project) reports.

- Policy 2.14.1 Comprehensive plans must evaluate the present and future availability of water resources for water supply use in extra-jurisdictional locations, based on existing and projected local need as established by the plan's population projections and other demand models and assessments developed by the appropriate water management district.
- Policy 2.14.2 Applicants seeking to utilize state resources shall provide sufficient information to ensure that the proposed use of that resource will not have a significant adverse affect on the economy and ecology of the local jurisdiction.
- Policy 2.14.3 Local governments must be advocates in requesting the Department of Community Affairs to propose to the Legislature that any development proposal to transport water outside the region must be considered a Development of Regional Impact, and involve analyzing the impacts of water extraction and/or diversion to the economic and environmental well-being of the local government jurisdiction providing the water resource.
- Indicator: Adoption and enforcement of policies and ordinances which require the appropriate utilization of the region's natural resources.

O. STRENGTHENING FAMILIES

Goal 2.15 Strengthen the family unit to enable its economic independence.

- Policy 2.15.1 Eliminate programs and policies which provide incentives for voluntary parental separation.
- Policy 2.15.2 Promote programs and policies which aid in stabilizing and strengthening the family unit.
- Policy 2.15.3 Develop and enhance already existing programs that ensure parental participation in the educational system.
- Policy 2.15.4 Require all able recipients of governmental financial assistance must participate in programs that further their education , develop and enhance their employability, and/or build upon their work experience.

Policy 2.15.5 Increase the efficiency of the child support collection system and the accountability of parents who have voluntarily removed themselves from the family unit.

Policy 2.15.6 Utilize and support agencies, organizations, and individuals that specialize in the area of family dispute resolution.

Policy 2.15.7 Place emphasis on prevention of family violence and punishment of the guilty party.

- Indicators:
- (A) Decrease in divorce rate.
 - (B) Decrease in allocation of governmental financial payments.
 - (C) Increase in the percentage of parents fulfilling their child support payment obligation.
 - (D) Increase in parental involvement in educational decision making.