

# BISCAYNE BAY ECONOMIC STUDY – PART 1, BASELINE AND TREND REPORT

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Planning and Economics Group

Uses dependent on Biscayne Bay and the Miami River were responsible for 10.2 percent of Miami-Dade County's economy and 1.5 percent of Florida's economy in 2004 – That is the conclusion of a 2005 study funded by the State of Florida and the Florida Inland Navigation District. The current and historic uses and economic contribution of Biscayne Bay and the Miami River were the focus of this study which is Part 1 of a two part project. Part 2 addresses the impact of Bay and River management scenarios on their uses and economic contribution and will be completed once funding is obtained.

## Biscayne Bay And Miami River Uses Generated \$6.3 Billion In Income to Miami-Dade County Residents In 2004 (Direct, Indirect, and Induced Impacts)

Activity	Income to County Residents		Employment in County	Tax Revenue
	Value	% of All Income		
Recreation	\$2,112,000,000	3.4%	57,100	\$257,000,000
Port of Miami Shipping	\$3,857,000,000	6.2%	74,000	\$331,000,000
Miami River Shipping	\$339,000,000	0.6%	6,100	\$37,000,000
Commercial Fishing	\$17,000,000	0.03%	470	\$1,800,000
<b>Total</b>	<b>\$6,325,000,000</b>	<b>10.2%</b>	<b>137,600</b>	<b>\$627,000,000</b>

Part 1 used extensive survey research of Miami-Dade County residents and visitors and existing data from a variety of government and private sources. Some of the many conclusions of Part 1 are as follows.

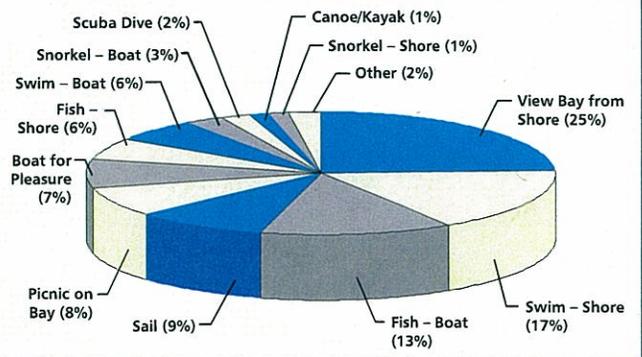
Expenditures related to Biscayne Bay recreation generated \$2.1 billion in income to county residents or 3.4 percent of the county's economy in 2004. Over 57,000 jobs exist in the county due to these recreation activities.

Shipping activities on the Miami River comprised eight percent of imports and exports shipped through Florida in 2004 and generated \$339 million in income to county residents or 0.6 percent of the county's economy. About 6,100 jobs exist in the county due to Miami River shipping.

The variety of economic activities tied to the uses of Biscayne Bay and the Miami River add to the economic diversity of the region and the State and are important to sustain a strong economy.

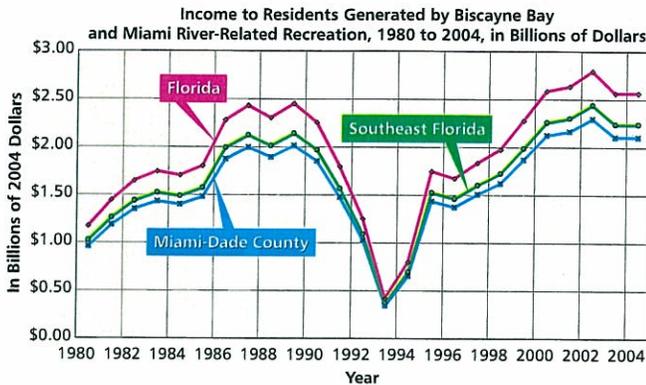
Residents and visitors spent 65.5 million person-days participating in a wide-variety of recreation activities on Biscayne Bay in 2004. A person-day is one person participating in a primary recreation activity for all or part of one day. Of the many activities that may be enjoyed by a recreator during a day, only one "primary" activity per person is counted per day.

% Distribution of Biscayne Bay Primary Recreation Activities, 2004

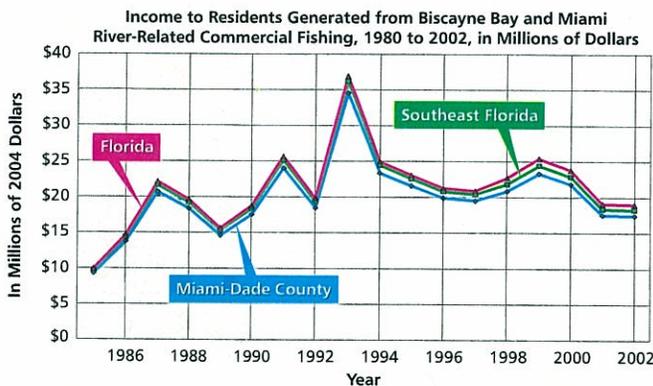


Uses dependent on Biscayne Bay and the Miami River were responsible for 10.2 percent of Miami-Dade County's economy and 1.5 percent of Florida's economy in 2004.

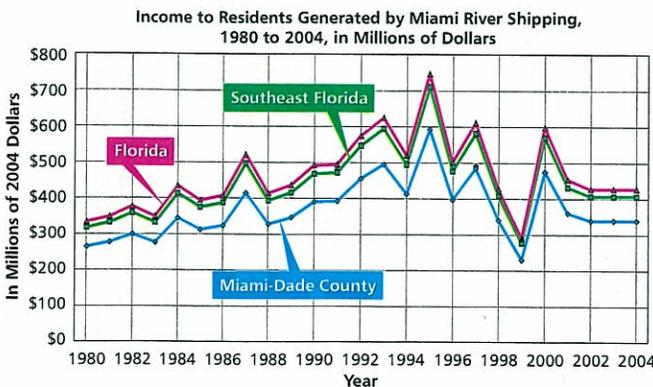
Biscayne Bay-related recreation use intensity and its economic contribution grew steadily since 1980 with the exception of 1992 and 1993. Recreation activity fell during these two years after Hurricane Andrew struck the county on August 24, 1992. By 1995, Bay-related recreation use intensity had completely recovered.



The value of commercial marine species caught in Biscayne Bay has increased significantly since 1980. Meanwhile, the harvested value of species dependent on Biscayne Bay for survival and caught outside of the Bay has declined significantly since 1993. Overall, commercial fishing peaked in 1993 and was higher in 2002 than it was in 1985.

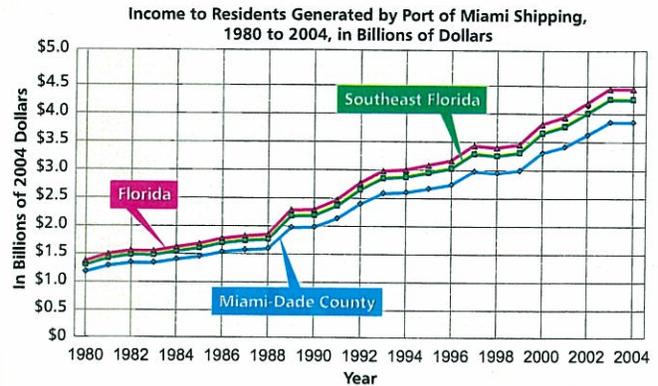


Cargo shipping services through the Miami River and their associated economic contributions grew steadily



from 1980 to 1995, then fell and were cyclical through 2001 and remained constant from 2001 to 2004.

Cargo shipping and cruise ship services through the Port of Miami and their associated economic contributions have grown steadily and significantly since 1980.



The recreational surveys included questions regarding resident and visitor reactions to three Bay/River management scenarios: (1) improvements in water quality; (2) increased boating access; and (3) increased general recreation access. Survey respondents were asked how their recreation uses would change under each scenario. Residents were asked their acceptance of and willingness to pay for these management scenarios. The results can be used to develop statistical models that predict changes in recreational uses by activity under the three management scenarios and the value of each management program to residents.

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