



Quality of Life & Quality Places Advisory Committee

Meeting #2

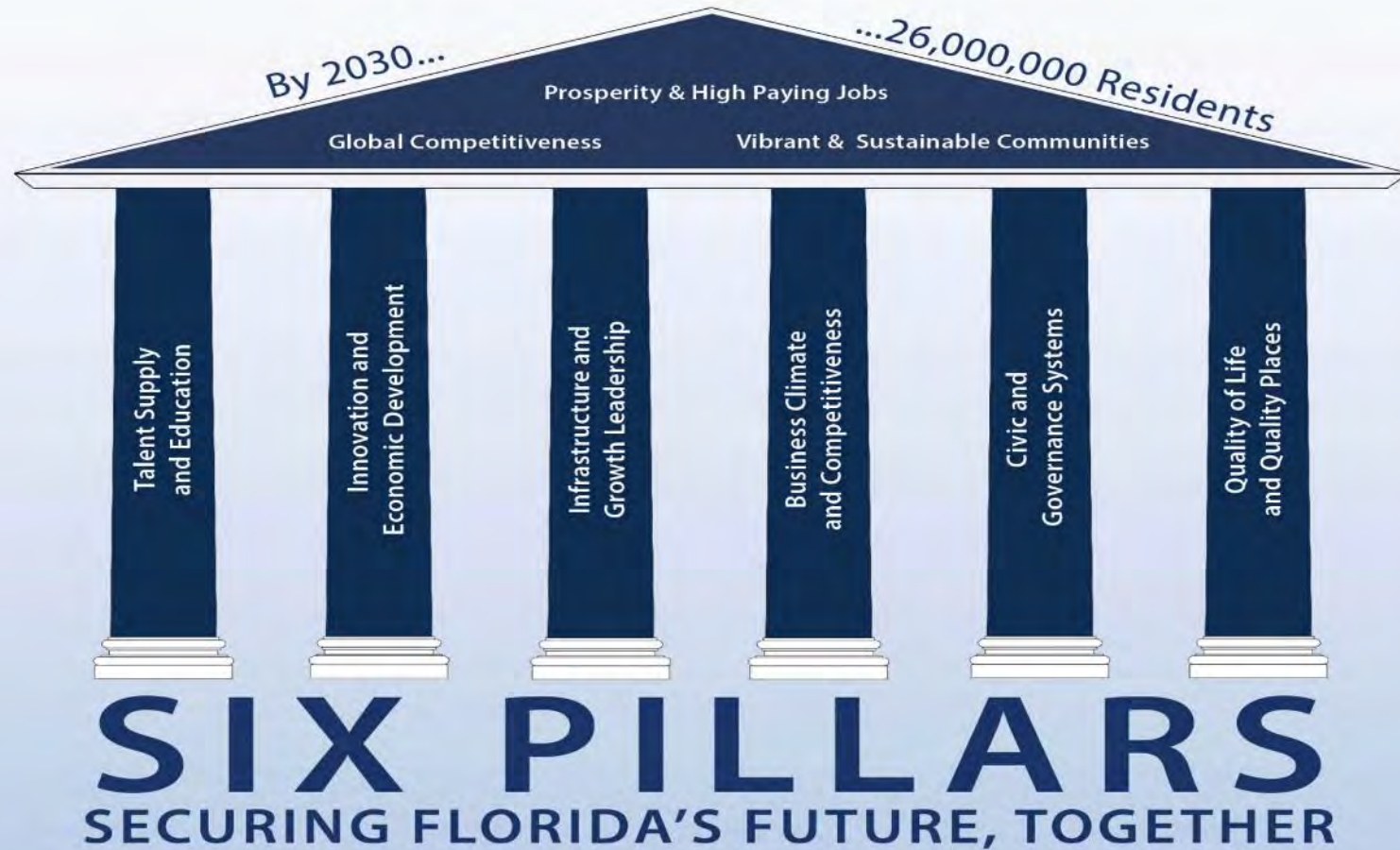
April 12, 2017

Housekeeping

- » **Please do not place your line on hold**
- » **Moderated conference lines**
- » **To raise questions and participate**
 - » Through the conference call:
 - » Press * 1 on your phone to be placed in a queue when lines are muted * 1
 - » All lines will be open and live during the Q&A/Discussion sections
 - » Through the webinar:
 - » You can type in a question directly through the webinar under the questions section

Today's Agenda

- **Introductions**
- **Project Overview**
- **Recap of March Meeting**
- **Pillar Issues and Needs**
- **Pillar Priorities**
- **Next Steps and Action Items**



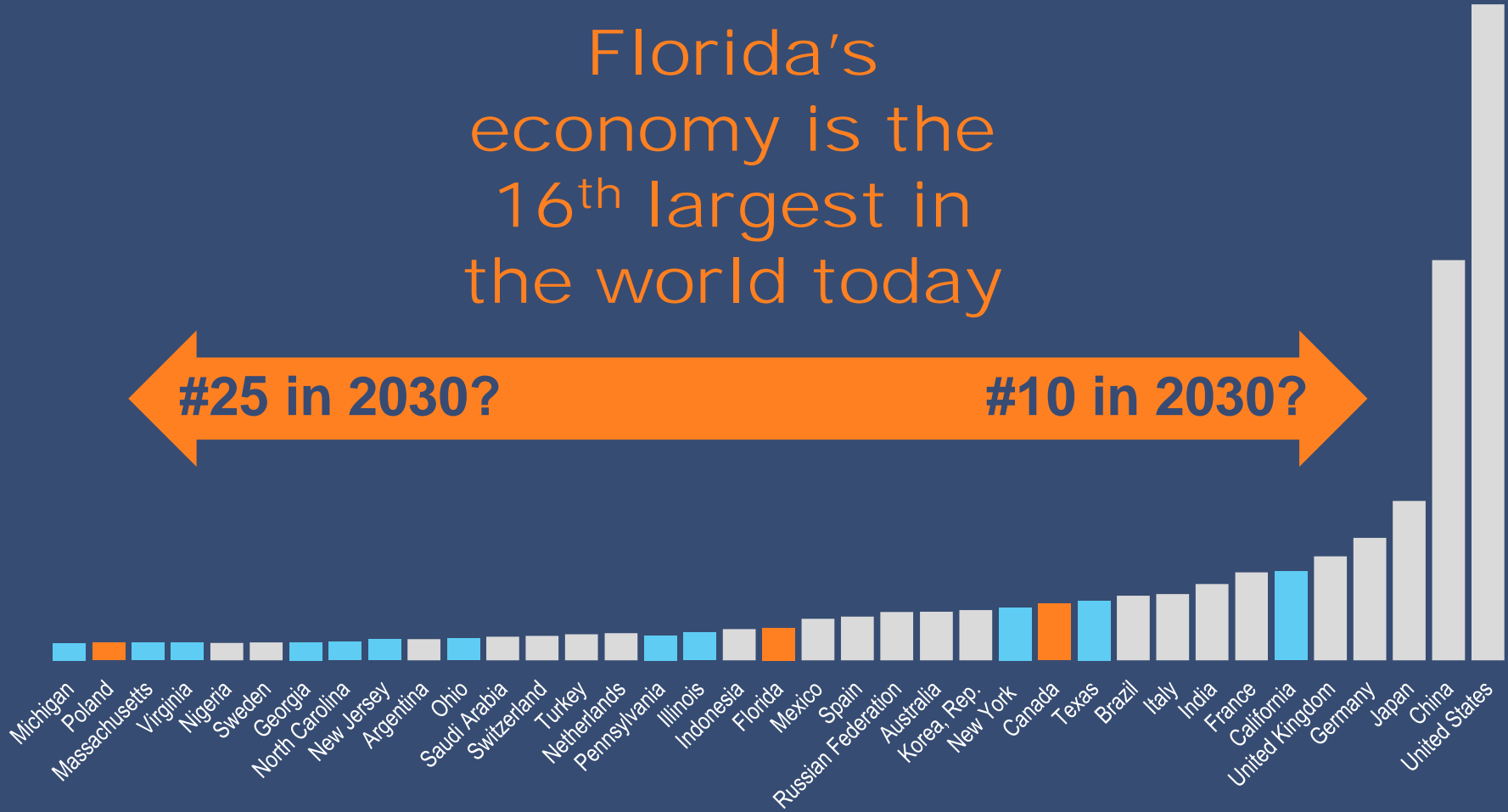
“We must plan better for the next 6 million Floridians than we did for the last 6 million”

Where Will We Be?

Florida's economy is the 16th largest in the world today

#25 in 2030?

#10 in 2030?



Source: World Bank, 2015

Florida Chamber Foundation Trustees

Florida 2030
Executive Steering
Committee

Stakeholder,
Association, and
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Talent Supply &
Education
Advisory
Committee

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&
Competitiveness
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Governance
Systems
Advisory
Committee

Quality of Life &
Quality Places
Advisory
Committee

Caucus Members

Caucus Members

Caucus Members

Caucus Members

Caucus Members

Caucus Members

Anticipated Committee Work Plan

Date	Activity
March 22-23rd	Kickoff meeting; Capitol Days, Tallahassee, FL
April 11	Webconference to review initial research results
April 18	Joint call of all committees
May 8	Webconference to review additional research results
May 22	Joint call of all committees
June 14-15, Orlando	In person meeting to begin identifying 2030 targets and strategies
July-August	Additional webconferences as needed to refine 2030 targets and strategies
September 27-29, Orlando	Future of Florida Forum– in person meeting to review draft Pillar research report
Early 2018	Rollout of Florida 2030 report

Today's Presenters



LEIGH COOK
Senior Director Futures
Solution Lead



SANDJAR KOZUBAEV
Senior Manager Futures
Project Lead

Today's Presenters

North Highland is a global consulting firm that has changed the model of how a consultancy serves its clients. We guarantee our work, hire top notch talent and work with some of the largest organizations in the world to achieve exceptional results.



OUR HOME

Headquartered in Atlanta, GA



PROFESSIONALS

3,000 worldwide
1,000+ in U.S.



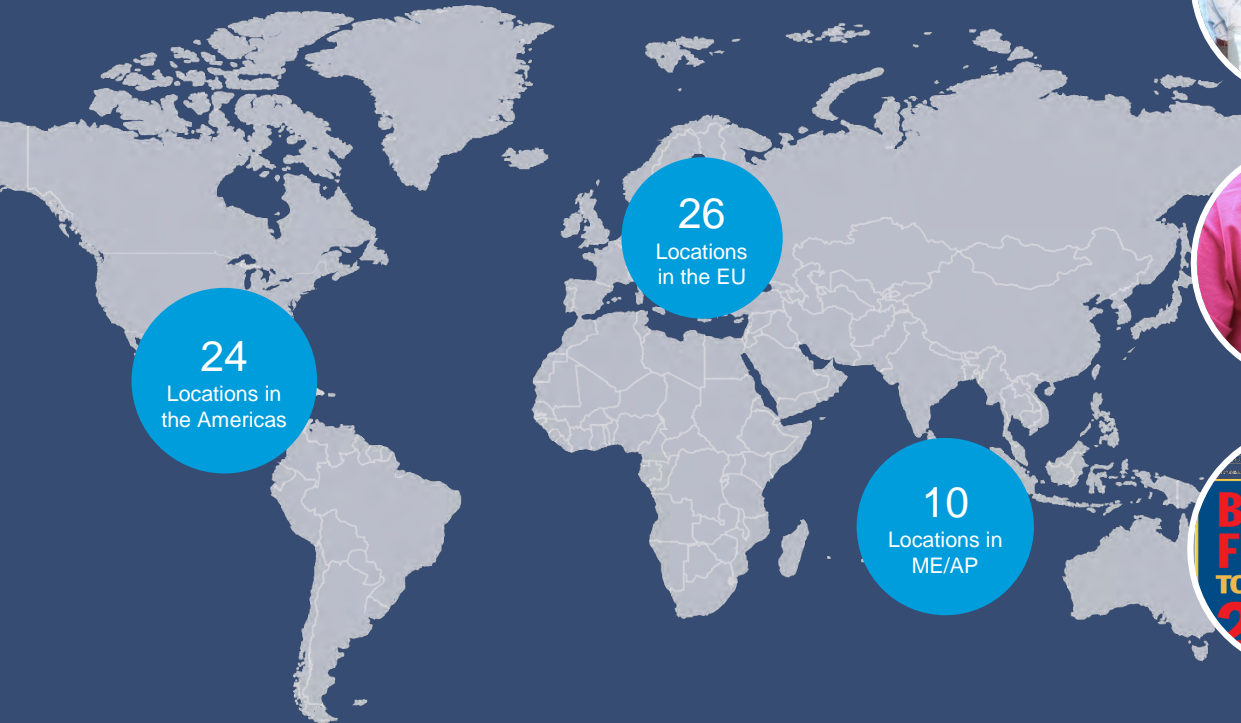
STRUCTURE

Private company,
100% employee-owned



ACCOLADES

Consistently ranked a Best Place to Work nationally and in local markets



TRENDS AND CONDITIONS



Quality of Life & Quality Places Pillar & Zones

- 1. Health & Wellness**
- 2. Safety & Security**
- 3. Housing & Livability**
 - Affordable Housing
 - Homelessness
- 4. Families & Children**
- 5. Retirement & Lifelong Engagement**
- 6. Economic Opportunity & Prosperity**
- 7. Sense of Place & Community**
 - Arts, Culture & Heritage
 - Rural Issues
 - Urban Issues
 - Recreation



Defining Quality of Life & Quality Places

- Goal to make Florida the No. 1 place to live, work, and do business
- Community livability is an economic asset
- Quality of Life & Quality Places are defined the same way everywhere
- Assumption: Whether urban or suburban, the most desirable neighborhoods have similar qualities

What Makes a Quality Place?

Ambience – those visual things that add to a pleasant public environment

- Clean streets and sidewalks
- Landscapes, gardens and flowers
- Public art

Infrastructure – those things that are core to a functioning neighborhood

- Public transportation/walkability
- Quality streets/sidewalks/lighting at night
- Good schools

Amenities – those things that add valuable experiences

- Cultural or historical places
- Quality parks and recreation
- Public events and entertainment

People and Values – resident interactions

- Friendly and helpful neighbors
- Acceptance, tolerance, diversity

Housing – the mix and quality of residences

- Up and coming/strong potential for equity
- More affordable houses or greater value compared to other neighborhoods
- Fixer-upper opportunities
- High-quality rental opportunities
- High-quality ownership opportunities

Proximity – the convenience of getting around

- To employment
- To shopping for high-quality basics
- To shopping for specialties/restaurants
- To social services

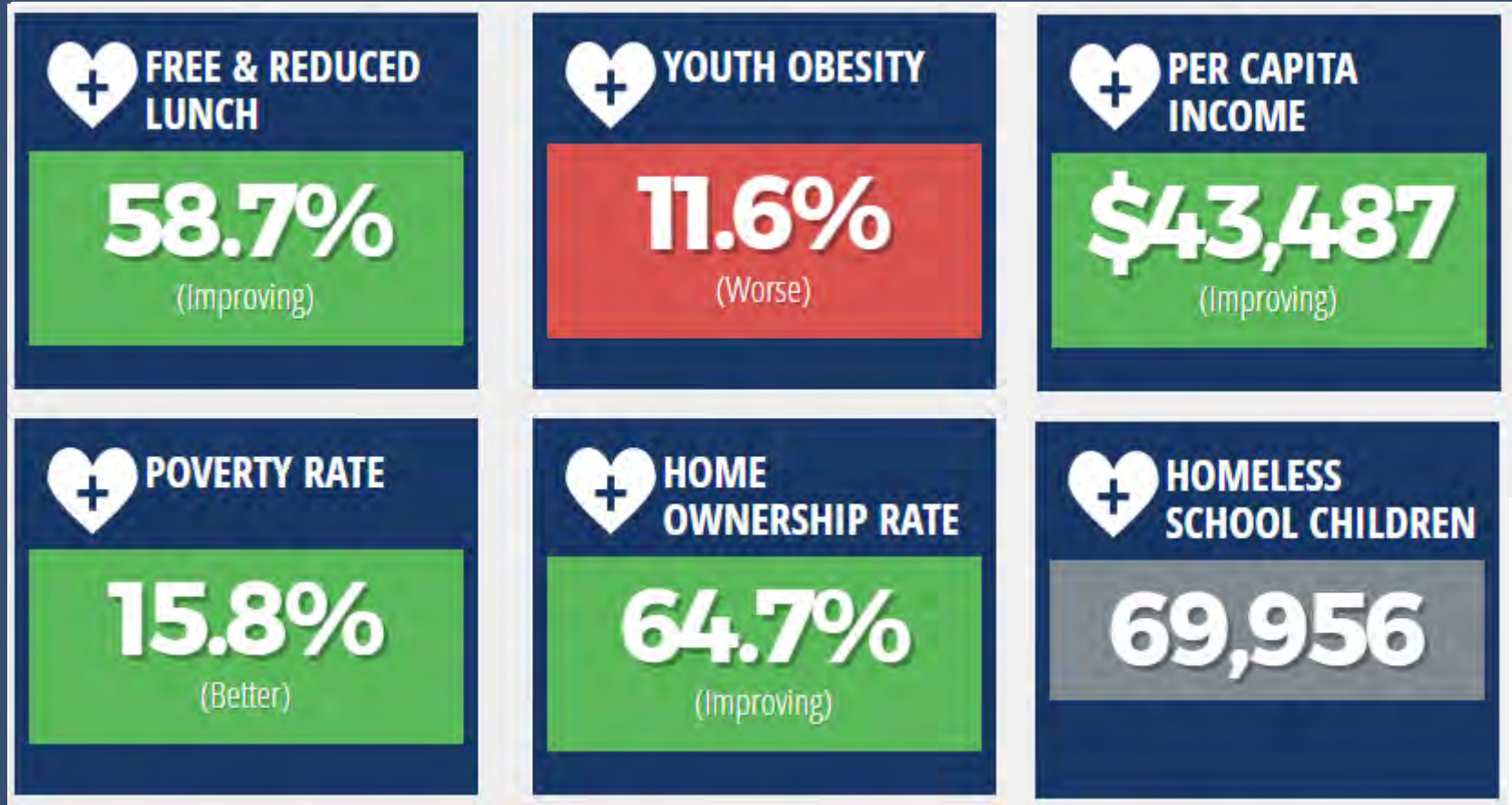
Source: NeighborWorks America

Quality of Life/Quality Places: Working Themes

- **HEALTH AND WELLNESS IN EVERY ZIP CODE**
 - Measuring and improving health in diverse populations
 - Retiring elders and the dynamics of Medicare and Medicaid
- **THE FLORIDA DREAM**
 - Attainable housing and lifestyles to raise families
 - Vibrant places to attract creative workers for the knowledge economy
- **LIVING AND DYING IN $\frac{3}{4}$ TIME**
 - Making places that continue to attract retirees from other places
 - Quality of end of life
- **FLORIDA'S PLACE IN WORLD CULTURE**
 - Reputational risk causes by political dynamics
 - Miami's role as the "Capital of Latin America"
- **TRUE FLORIDIANS**
 - Building affinity and sense of belonging among residents
 - Nurturing a common identity for Floridians in vastly different regions

The Florida Scorecard.com

Quality of Life & Quality Places



HEALTH AND WELLNESS IN EVERY ZIP CODE

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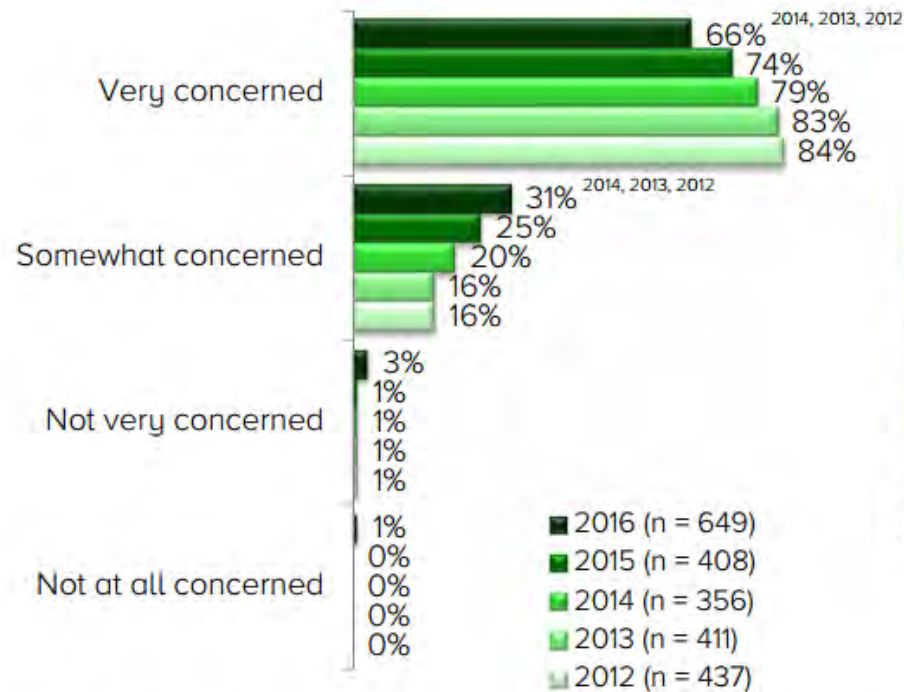
Health and Wellness

- Florida ranks in the top third in terms of per capita health care expenditures
- Florida has the third highest uninsured rate in the country at 13%
- Florida is ranked 50th in terms of the percent of people whose healthcare is covered by their employers (39%)
- Florida ranks in the bottom third of states in terms of the availability of primary health care professionals
- Florida ranks in the top third of states with residents reporting “fair or poor” health status

Opportunities:

- Innovation by providers, e.g., telemedicine, new models of care
- Use of information and data & analytics

Business Concern About Controlling Healthcare Costs



Differences between high-tech companies and all other organizations

2016	High-Tech Companies	All Other Organizations
Very concerned	56%*	70%
Somewhat concerned	38%*	27%
Not very concerned	5%*	2%

Note: High-tech companies n = 209; all other organizations n = 440.

*Only statistically significant differences are shown. "All other organizations" does not include high-tech companies.

Note: Respondents whose organizations provided health care coverage were asked this question. Respondents who answered "not sure" were excluded from this analysis. Percentages may not total 100% due to rounding.

²⁰¹⁴ Statistically significant difference from 2014. ²⁰¹³ Statistically significant difference from 2013. ²⁰¹² Statistically significant difference from 2012.

Source: Society of Human Resource Managers

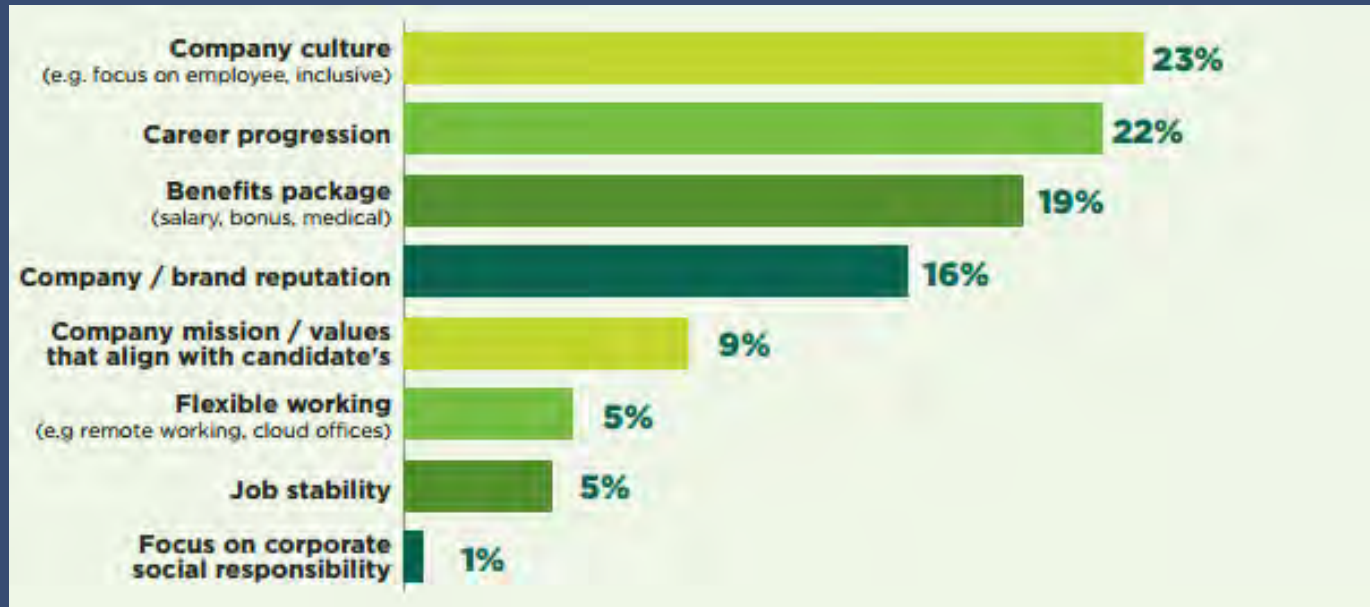
Healthcare Benefits and Talent Supply

- Employee benefits remain an important factor in recruiting and retaining talent
- Concern over cost of healthcare affects hiring demand
- Affordability and quality of employer-provided benefits are an important tool for businesses to acquire talent

Sources:

- <https://www.frbatlanta.org/economy-matters/2017/02/09/employment-survey-results>
- <https://www.entrepreneur.com/article/223516>
- <https://hbr.org/2016/04/recruiting-strategies-for-a-tight-talent-market>

Main Reasons Job Candidates are Choosing Companies



Source: Korn Ferry Institute, "The Talent Forecast,"
http://static.kornferry.com/media/sidebar_downloads/futurestep-talent-forecast-part-one-final.pdf

Discussion Questions

As we look to 2030:

- What are the major **challenges** and **opportunities** related to this pillar?
- How can we achieve **global leadership** and position Florida as the leading state for the 21st century?
- How can we create **economic prosperity** for all residents?
- How can we ensure **vibrant and sustainable communities** in this next wave of growth?

THE FLORIDA DREAM

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Quality Job + Quality Place = Quality Life

- Florida's growth has been built on growth of service jobs, construction, and tourism
- Large structural changes in the national economy are organically moving resources out of the housing and finance industries
- Nearly half of new jobs created will be in the service industry
- Nearly half of new jobs will be in analytical and knowledge-based jobs
- Manufacturing and technology cannot create all the jobs we need in Florida 2030

Sources: UF Bureau of Economic and Business Research; US Census Bureau

Share of Employment Growth Rate by Pay



Source: UF Bureau of Economic and Business Research

Signs of Change in Priorities

“Firms have become more competitive in an effort to retain and attract employees but quality of life and work environment, rather than compensation, seems to be the driving factor for many when making a decision.”

Sources:

Atlanta Federal Reserve Bank Human Resource Advisory Council <https://www.frbatlanta.org/economy-matters/2017/02/09/employment-survey-results>

<https://www.federalreserve.gov/newsevents/speech/brainard20150402a.htm>

<http://www.citylab.com/design/2016/12/why-quality-of-place-matters/509876/>

Urban, Suburban, Exurban

- Contrary to popular opinion, most young people are settling in suburbs
- Urban and suburban areas are coalescing into connected megaregions
- Exurbs expanded during housing boom, but may be stressed and remain outside urban services

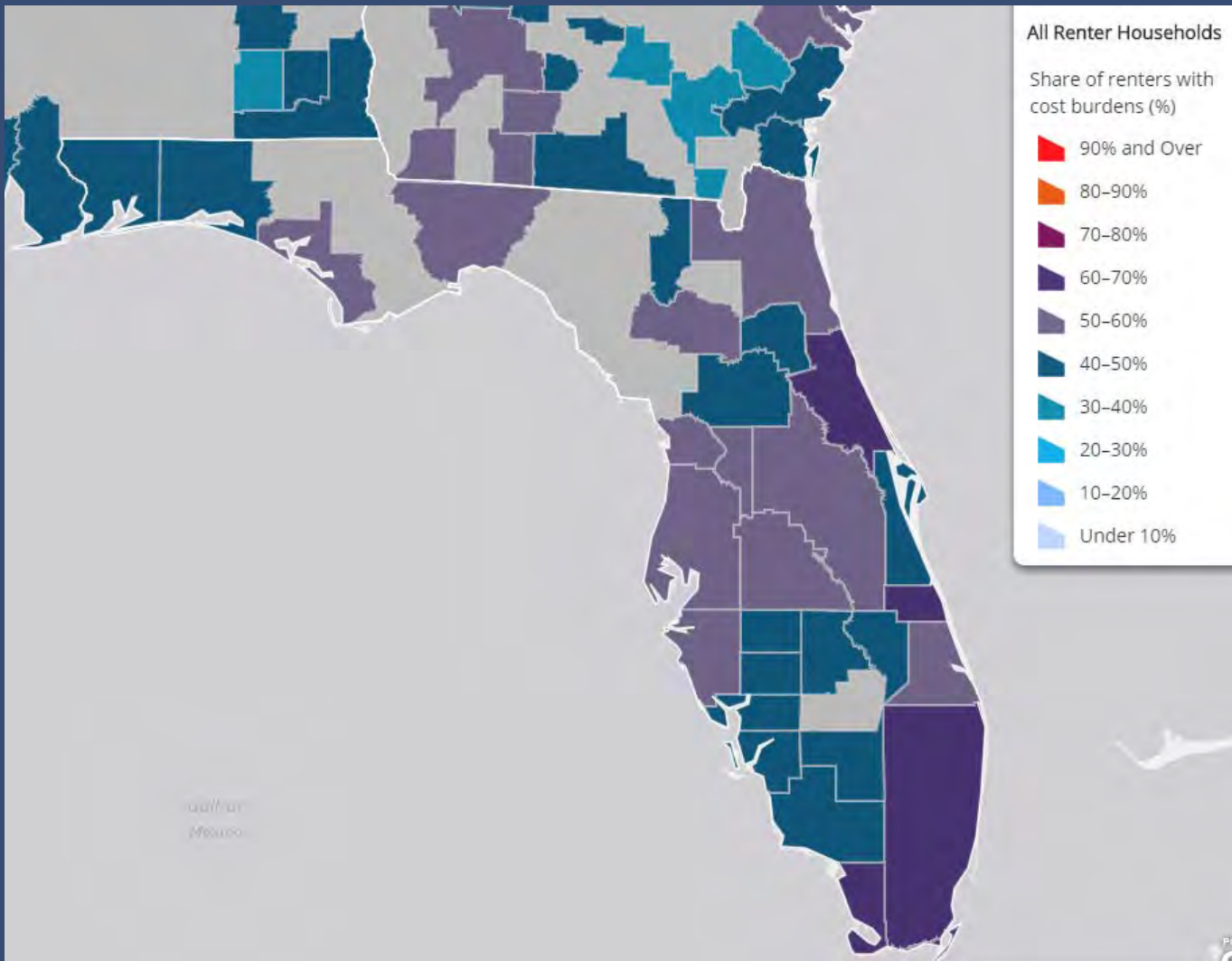
Opportunities

- Low-cost housing options for families, fixer-upper opportunities
- Broadband access (online education, work from home)

Quality Job + Quality Place = Quality Life

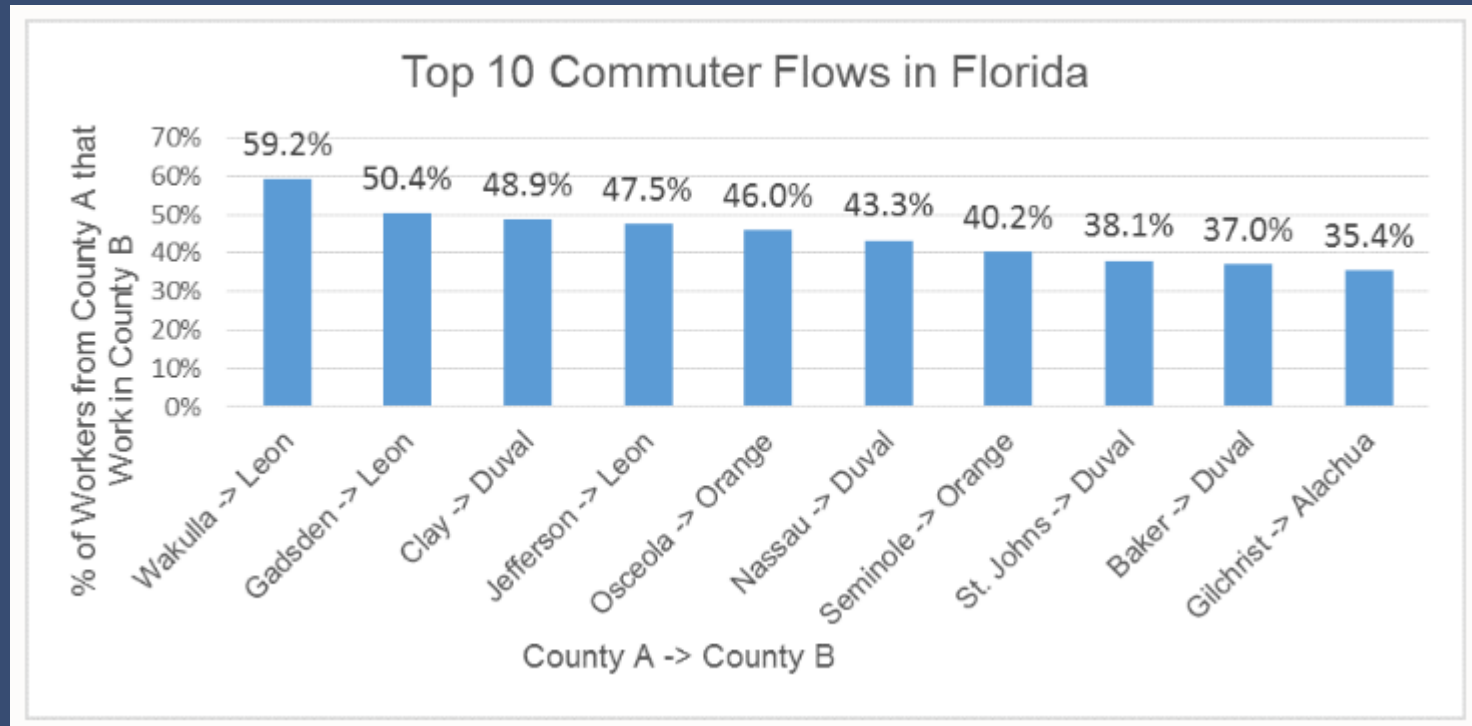
- In a service-based economy, where half of our new jobs will be created, how do we define a quality place and quality of life?
- Growing focus on ALICE – Asset-Limited, Income Constrained, Employed
- ALICE represents those who work hard and are above the poverty line, but due to high costs must live paycheck to paycheck

Renters spending more than 30% of income on housing costs



Source: Harvard Joint Center For Housing Studies

Traveling to Another County for Work



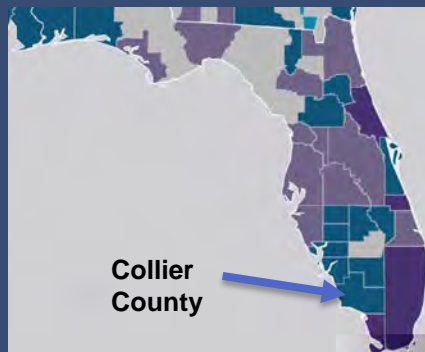
Source: <https://www.bebr.ufl.edu/economics/website-article/why-do-people-commute-other-counties-work>

Who is ALICE?

Who is cost-burdened in Collier County? People from across the community

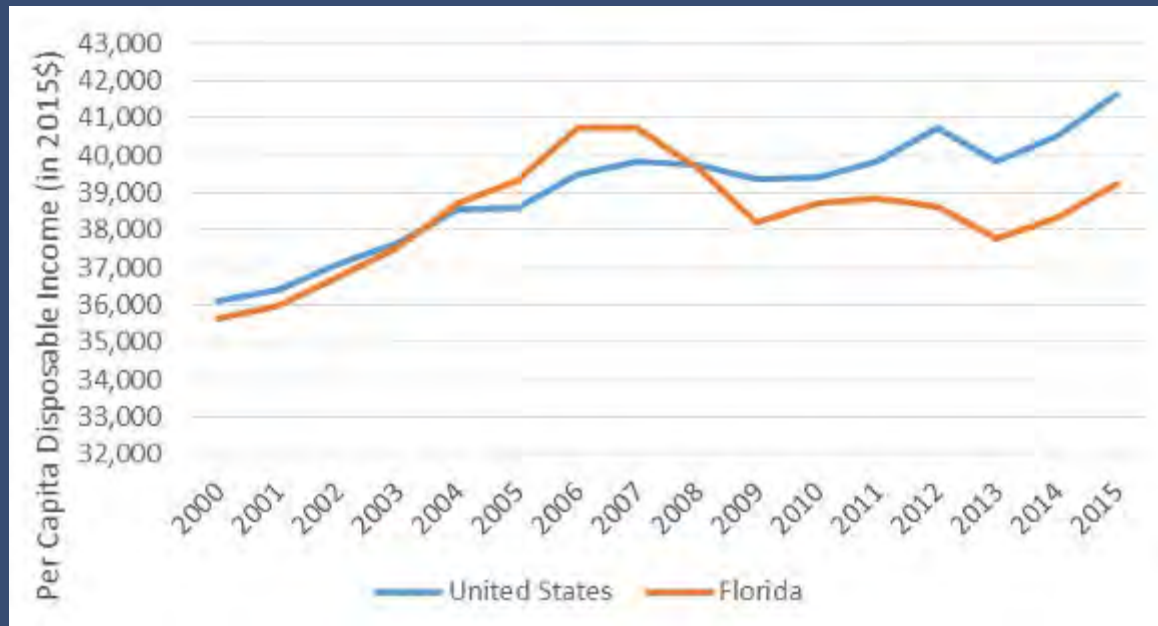
Public Safety	Firefighters, Police Officers
Health Care	Nurses, Nursing/Medical Assistants, Senior Care Providers
Education	Teachers & Teacher Assistants, Support Staff
Service Workers	Wait staff, hotel staff, retail / trade salespeople, golf course employees, landscape maintenance
Entry / Middle Level Professionals	Bank tellers, government employees, administrative assistants

These job sectors make up over 50% of all jobs in the county
They are first responders, educators of children, and health care providers.



Source: Urban Land Institute, Advisory Panel Presentation, Jan. 2017

Disposable Income



High housing costs affect other areas of the economy, such as retail spending, investments

Source: UF Bureau of Economic and Business Research

Rural Challenges

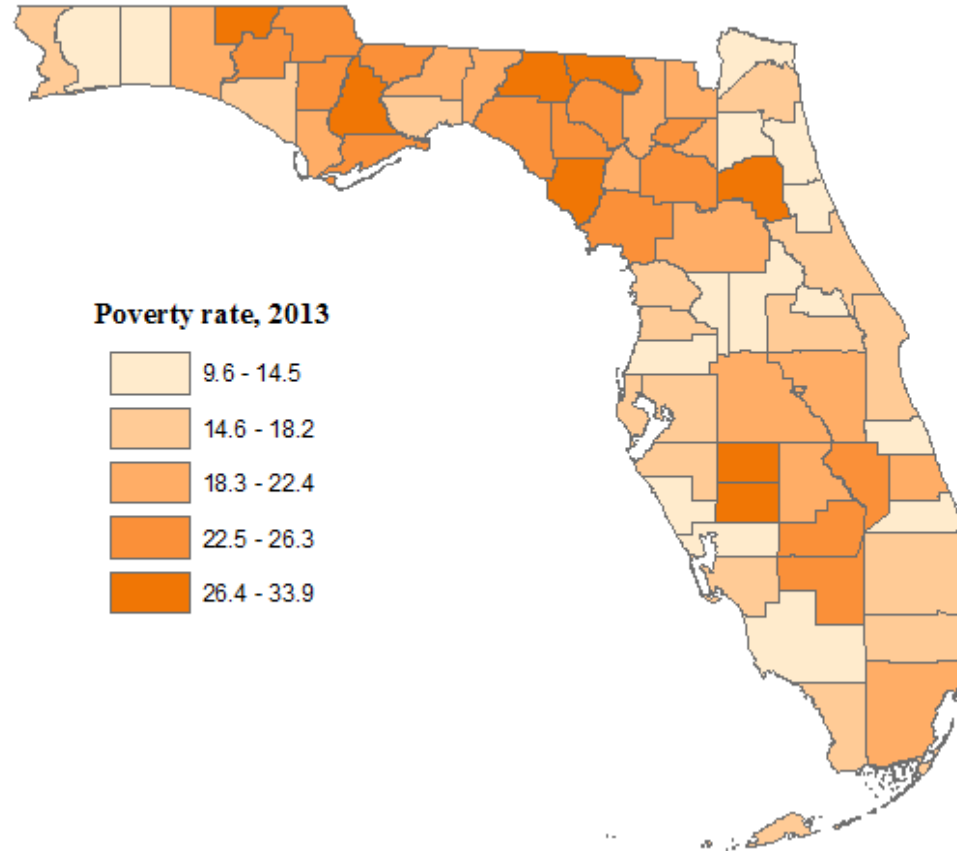
- The average per-capita income for Florida residents is about \$43,000 - rural per-capita approximately \$32,000
- Less access to healthcare facilities and providers
- Difficulty retaining schoolteachers, education infrastructure
- May be dependent on a single large employer (e.g., a correctional facility)
- Long-term loss of population in rural counties

Opportunities:

- Broadband access (online education, work from home)
- Natural and environmental assets

Poverty Rates

Map. Poverty rate in Florida's counties, 2013.

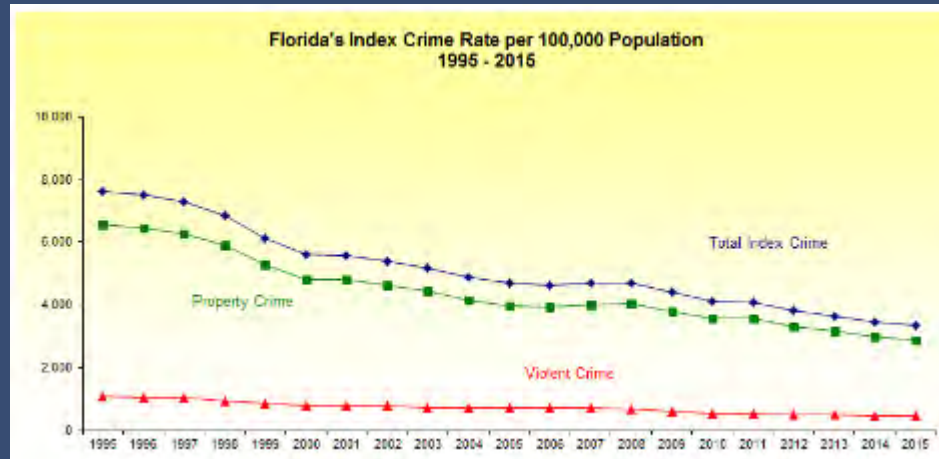


Source: UF Bureau of Economic and Business Research

Crime Rate Declines

Highest Crime Rates:

1. Leon
2. Escambia
3. Orange
4. Bay
5. Duval
6. Miami Dade
7. Pinellas
8. Hendry
9. Monroe
10. Columbia



Lowest Crime Rates:

1. Washington
2. Suwannee
3. Bradford
4. Nassau
5. Santa Rosa
6. Holmes
7. Sumter
8. Lafayette
9. Calhoun
10. Union

Source: UF Bureau of Economic and Business Research

Incarceration Rate Climbs

Figure 1 – Florida and New York See Equivalent Reductions in Crime

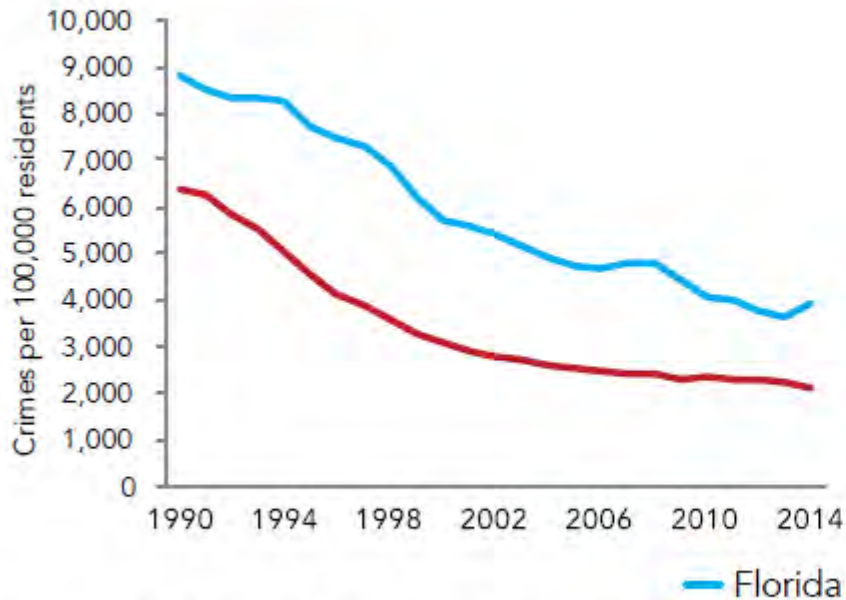
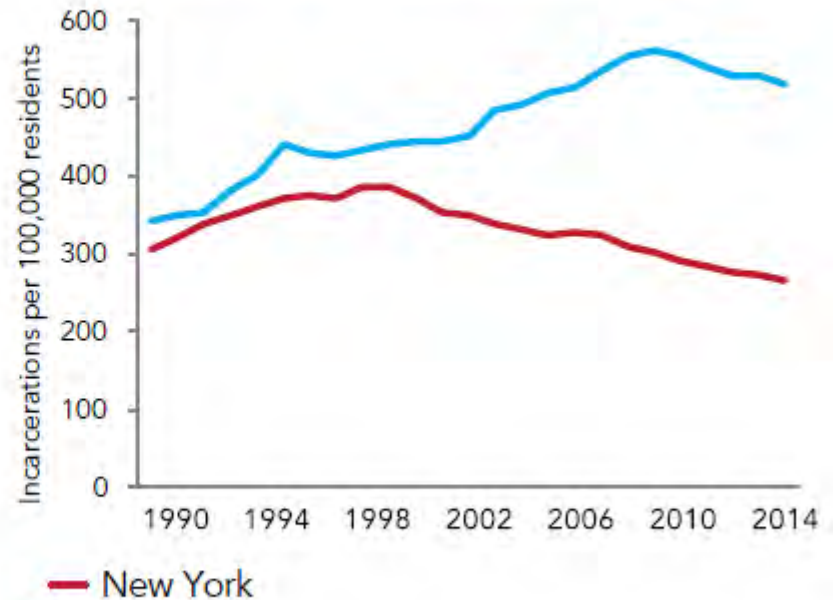


Figure 2 – New York's Incarceration Rate Drops while Florida's Climbs



Sources: Fig. 1 – Florida TaxWatch analysis of FBI Uniform Crime Report (UCR) data from 1980-2014;
 Fig. 2 – Florida TaxWatch analysis of Bureau of Justice Statistics Correctional Statistical Analysis Tool (CSAT) data.

Source: Florida TaxWatch

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LIVING AND DYING IN $\frac{3}{4}$ TIME*

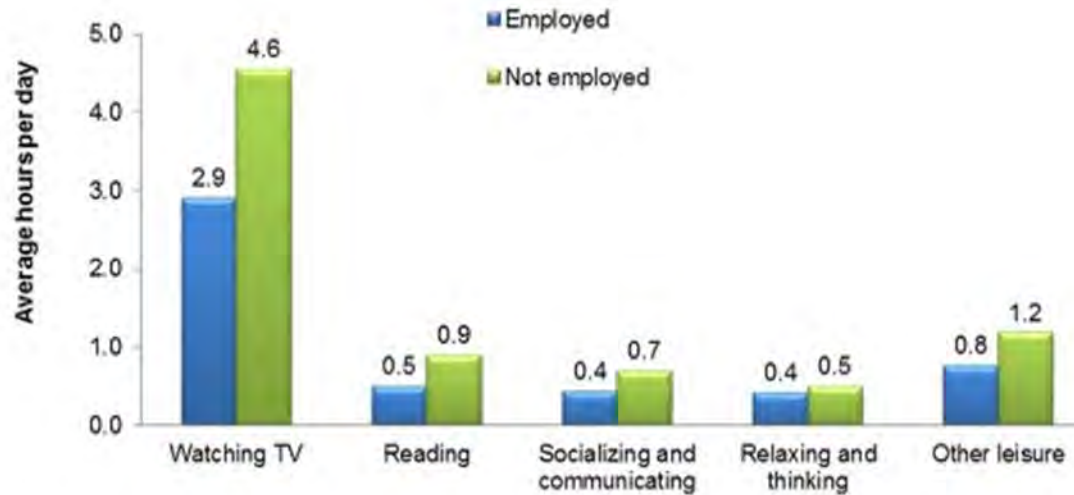
*With apologies to Jimmy Buffett

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“God’s Waiting Room”

- Higher share of individuals ages 65 and older than any other state, nearly 20% of the state’s population, or over 3 million people
- Boomers will drive demand for elder care, as well affect the economy via the transfer of their financial assets into Florida, traditionally a source of growth for the state
- Migration patterns and effect of the Baby Boomers remain unpredictable
- Profound difference between “old” oldsters and “new” oldsters of the Baby Boom
- Some Boomers may be turned off by large condo communities or retirement Villages
- Boomers may be “half-backers,” returning halfway back to their northern states of origin

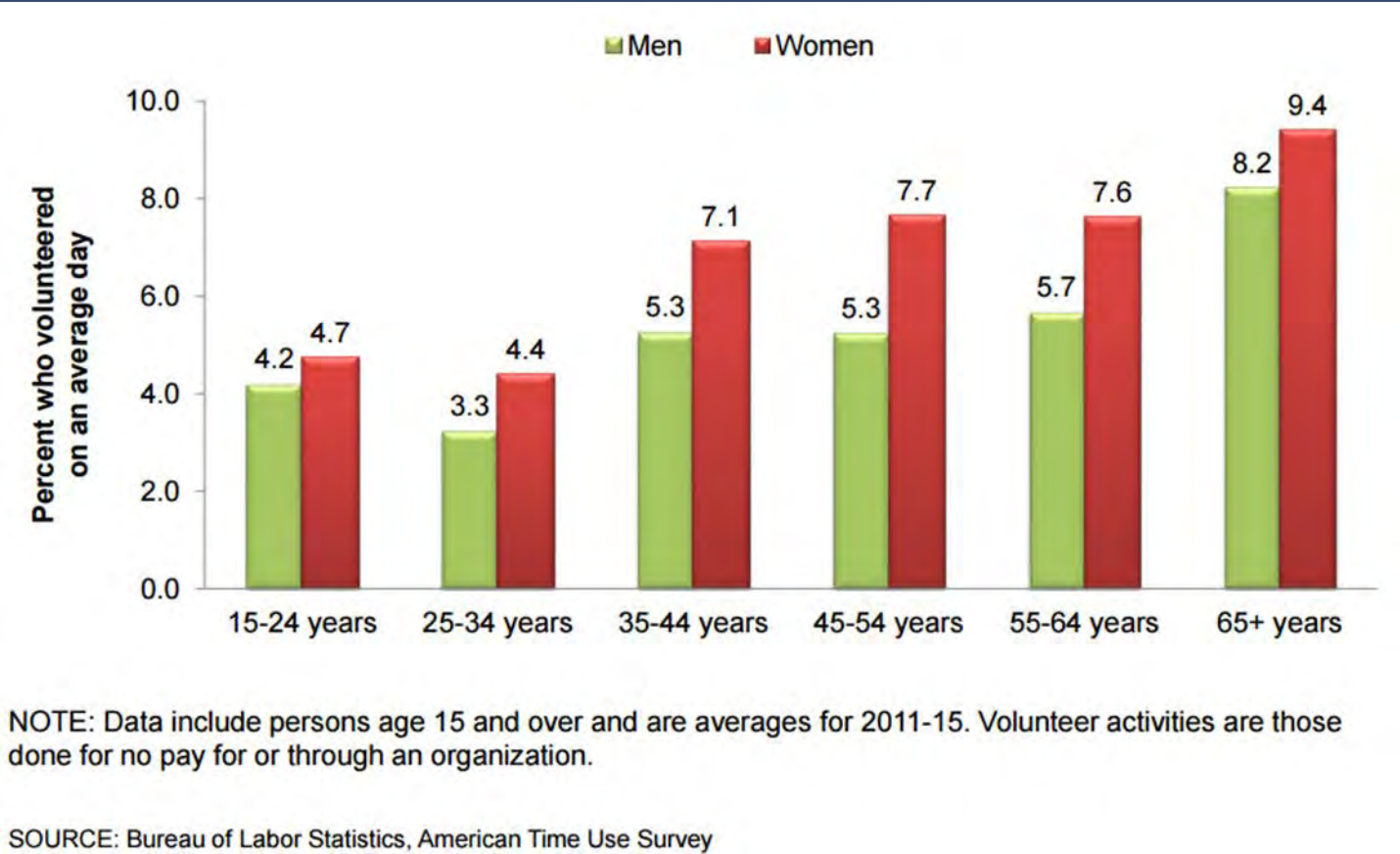
Leisure Time – 65+



NOTE: Data include all days of the week and are annual averages for 2015. Other leisure includes travel related to leisure.

SOURCE: Bureau of Labor Statistics, American Time Use Survey

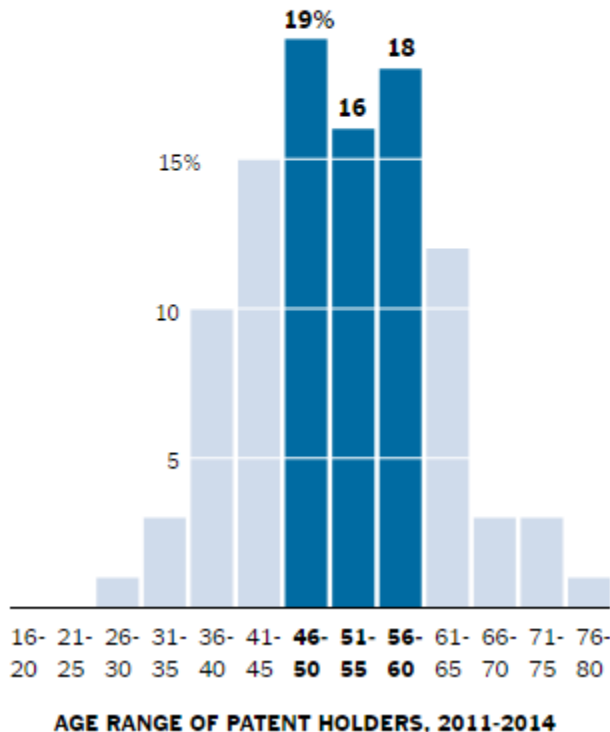
Volunteerism by Age



Economic Importance of Elders: Not Just Healthcare

When Inspiration Strikes

People granted international patents in information technology, materials science and the life sciences by age, according to a survey of inventors. Those aged 46 to 60 received a majority of those patents.



- Older inventors tend to produce higher value patents

Source: Walsh and Nagaoka, "Who Invents?: Evidence from the Japan-US Inventor Survey," 2009

Source: https://www.nytimes.com/2017/04/07/opinion/sunday/to-be-a-genius-think-like-a-94-year-old.html?_r=0

End of Life Care

“Few people want to be in a hospital in their final days; fewer still want to die in an ICU, tethered to drips and devices. Most of us would like to be at home, or in a homelike setting, surrounded by people we love and that love us. These are reasonable goals, but planning and preparation are required to reliably achieve them.”

- Ira Byock, MD, Director of Palliative Care at Dartmouth-Hitchcock Medical Center and author of *Dying Well* and *The Four Things That Matter Most*


“Many family caregivers reported home as the preferred place of care; other places of care were infrequently considered. Healthcare professionals and service providers should be aware of these preferences and provide support where needed to enable family caregivers to successfully care at home, thus improving end-of-life experiences for families as a whole.”

Source: <http://spcare.bmj.com/content/early/2015/05/19/bmjspcare-2014-000794>

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FLORIDA'S PLACE IN WORLD CULTURE

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Florida's Diversity

- Miami: “The Capital of (Affluent) Latin America”
- About one in five Floridians is foreign-born
- Miami is the US metropolis with the largest percentage of foreign-born residents, close to 51% of the population
- Over one-quarter of the population speaks a language other than English at home
- Overseas visitors delivered 12 percent of total tourism volume
- Cultural competency is emerging as one of the most critical differentiators for businesses
- In-migration halted during Great Recession
- In-migration is a key component of future growth

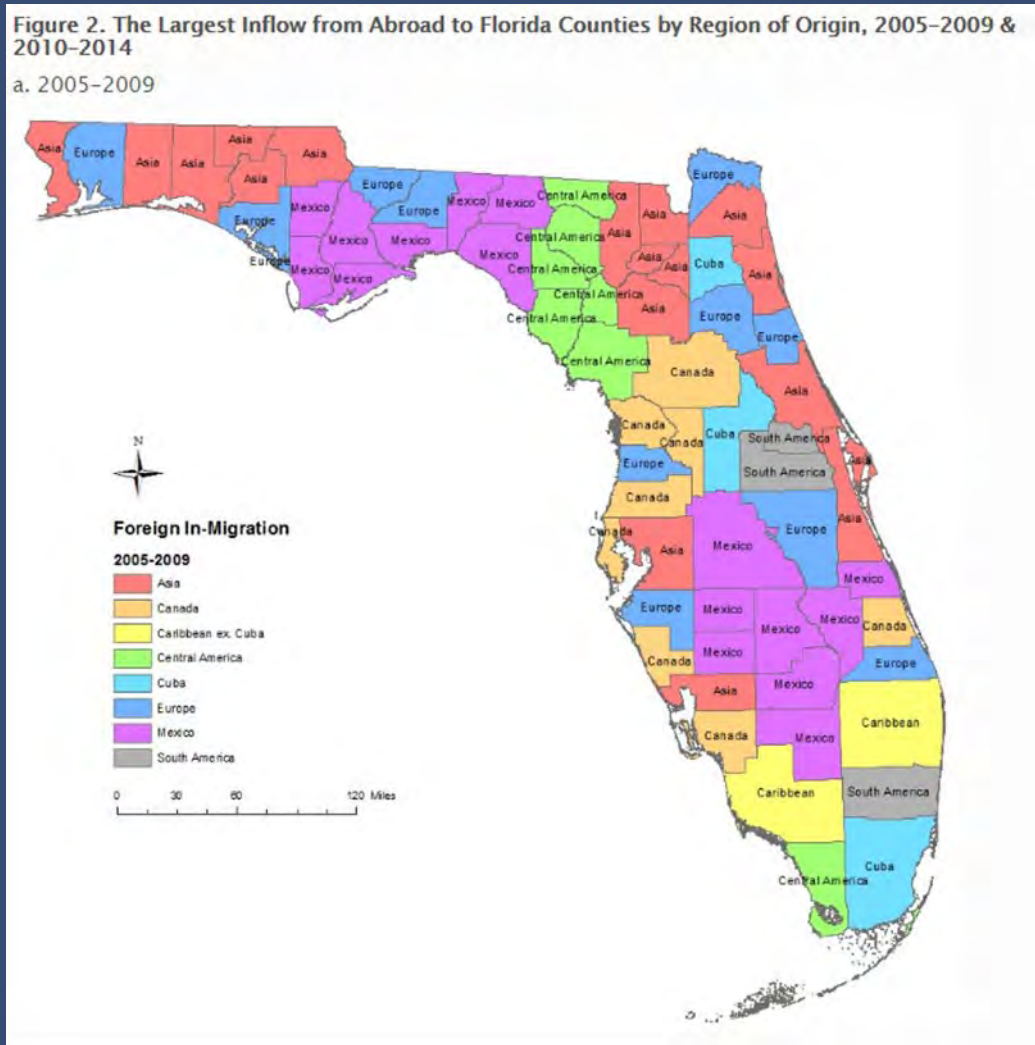
Source: UF Bureau of Economic and Business Research, Florida International University

<http://www.bbc.com/news/world-us-canada-36281648>

<http://content.time.com/time/magazine/article/0,9171,162806,00.html>



People From Abroad



Source: UF Bureau of Economic and Business Research. Note: Puerto Rico was not included.

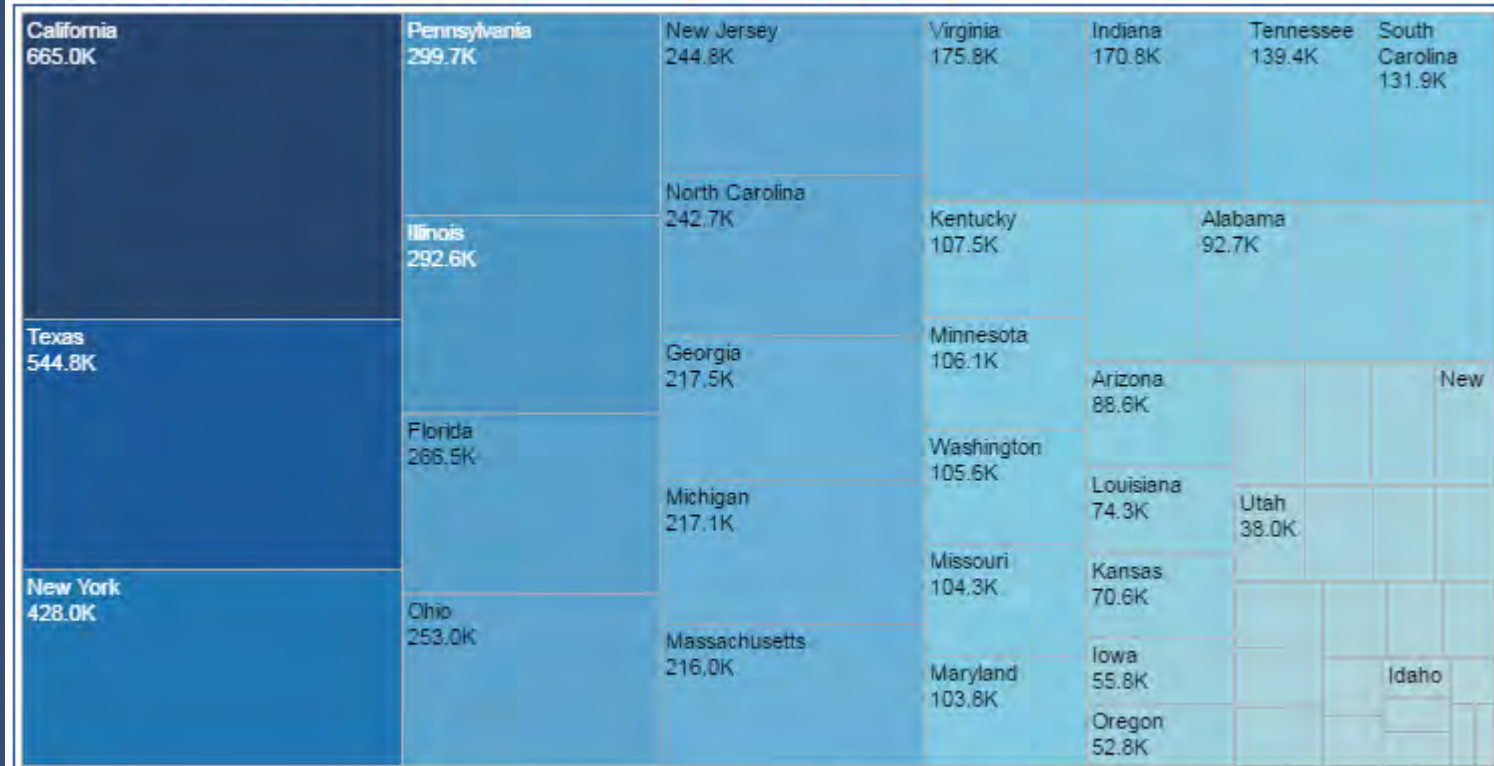
The 15 Largest Annual Migration Flows from Abroad to Florida by Country of Origin, 2005–2009 & 2010–2014

2005–2009			2010–2014		
Rank	Estimate	Country	Rank	Estimate	Country
1	14,660	Canada	1	19,506	Cuba
2	14,452	Cuba	2	16,599	Canada
3	13,714	Mexico	3	13,911	South America, not specified
4	11,388	Caribbean, not specified	4	11,234	Caribbean, not specified
5	7,129	South America, not specified	5	6,116	Mexico
6	4,825	Colombia	6	5,643	Colombia
7	4,071	Brazil	7	5,350	India
8	3,860	India	8	4,808	Jamaica
9	3,607	Germany	9	4,709	Haiti
10	3,409	Jamaica	10	4,089	Brazil
11	3,374	United Kingdom, excluding England	11	4,046	Western Asia, not specified
12	3,287	Guatemala	12	3,879	China, Hong Kong, Macau & Paracel Islands
13	3,075	England	13	3,494	Germany
14	2,932	Honduras	14	3,153	Central America, not specified
15	2,904	Philippines	15	2,884	Philippines

Source: <https://www.bebr.ufl.edu/population/website-article/foreign-migration-florida-2005%E2%80%932014>

Foreign Direct Investment

FDI Jobs by State Comparison for 2014 - --- All Countries Total



Source: Bureau of Economic Analysis <http://www.bea.gov>
Based on BEA data availability, suppressed values will not be shown

See also: <http://www.pewsocialtrends.org/2013/12/17/changing-patterns-of-global-migration-and-remittances/>

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TRUE FLORIDIANS

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Florida's Diversity, Part 2

- Only one in three residents were actually born in Florida (about half the national average for states)
- About one in five Floridians is foreign-born
- Transitory nature of residents has generally produced a lack of attachment at the state level

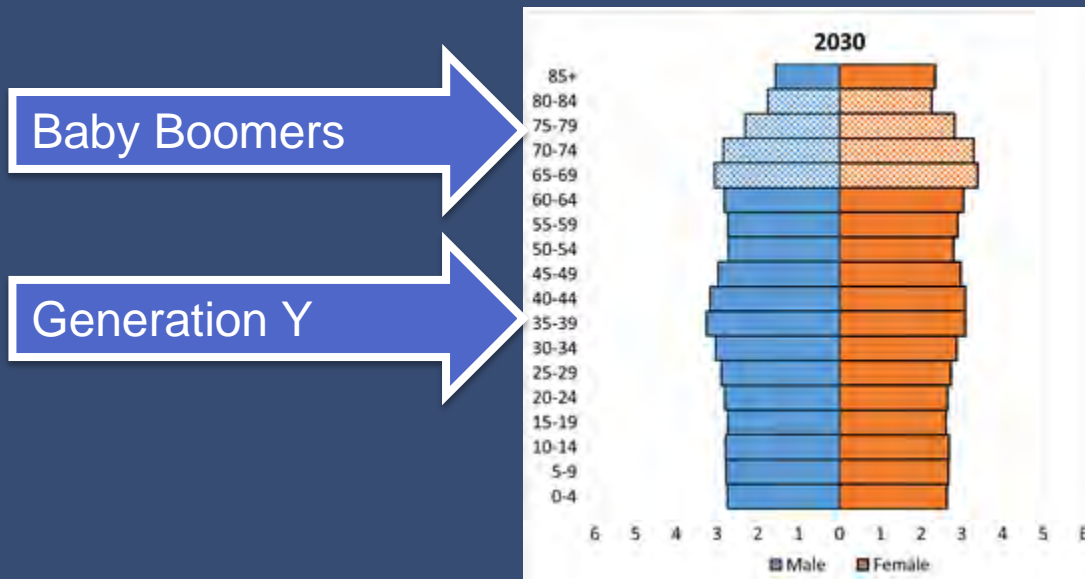
Sources:

UF Bureau of Economic and Business Research

Florida's Megatrends: Critical Issues in Florida, David R. Colburn and Lance DeHaven-Smith

Generation Y (Millennials & Centennials)

- Next “pig in the python” demographically
- Will they see Florida as a place to locate, settle, and raise a family?

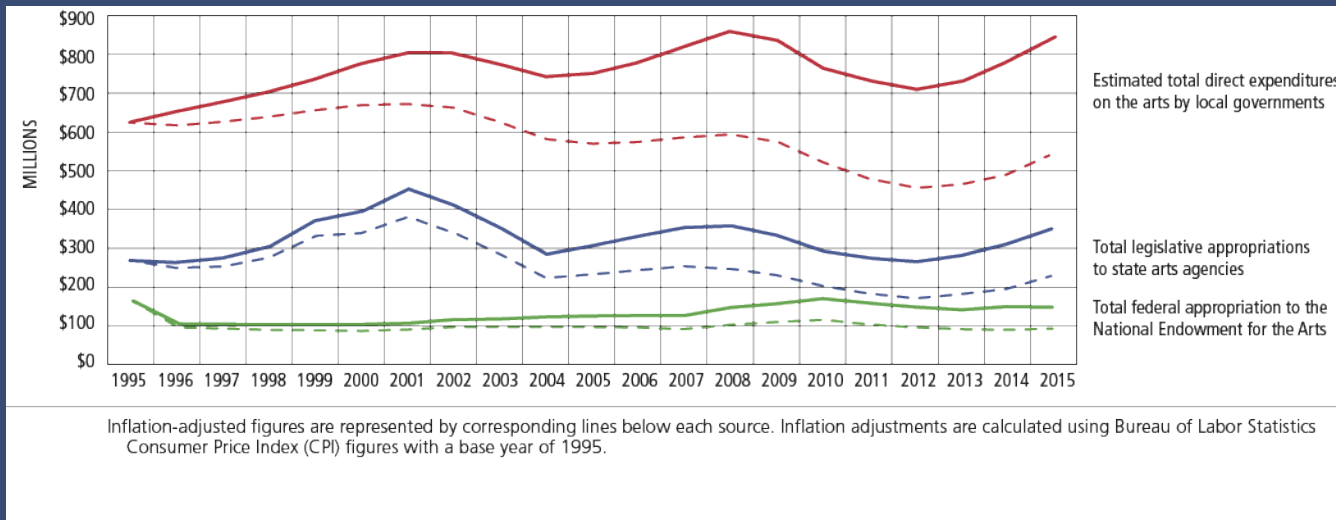


Source: UF BEBR

Arts, Culture, History

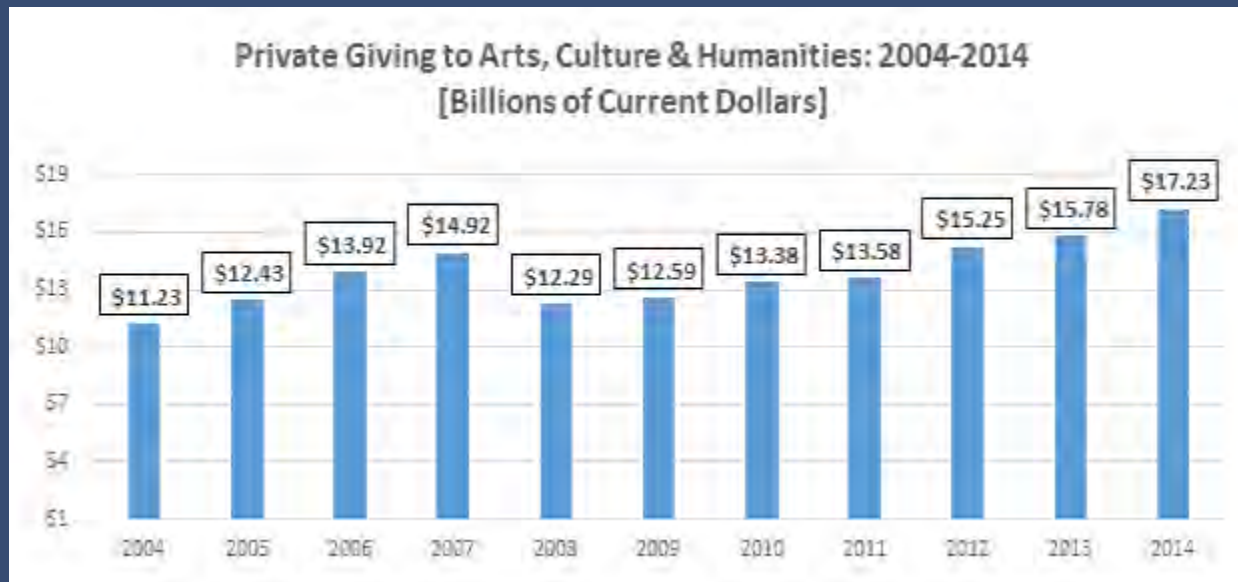
- Contributes to Florida's "sense of place"
- Significant factor for younger workers
- Increasingly seen as an economic development tool
- State, local, and private funds are slowly increasing again in the wake of the Great Recession
- Combined public funding sources remain below pre-recession levels measured in 2008
- Clustered in urban areas, and many rural areas may not have accessibility to arts and cultural resources
- State funding is scattered in various silos

Public Support for the Arts



Source: Grantmakers in the Arts <http://www.giarts.org/article/public-funding-arts-2015-update>

Private Giving Trends



Source: Americans for the Arts <http://blog.americansforthearts.org/2015/07/10/what%E2%80%99s-measured-matters-private-giving-to-arts-culture-way-up-in-2014>

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Share Your Thoughts

- Existing research, studies, and plans we should review?
- Other partners who should be at the table?

Next Steps

- **Upcoming dates:**
 - Joint committee call: **April 18, 10:00-11:30 am**
 - Quality of Life and Quality Places call: **May 8, 3:00-4:30 pm**
 - In person meetings: **June 14-15, Orlando**

1,000s of Floridians

6 Pillars

2 Years

1 Plan

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