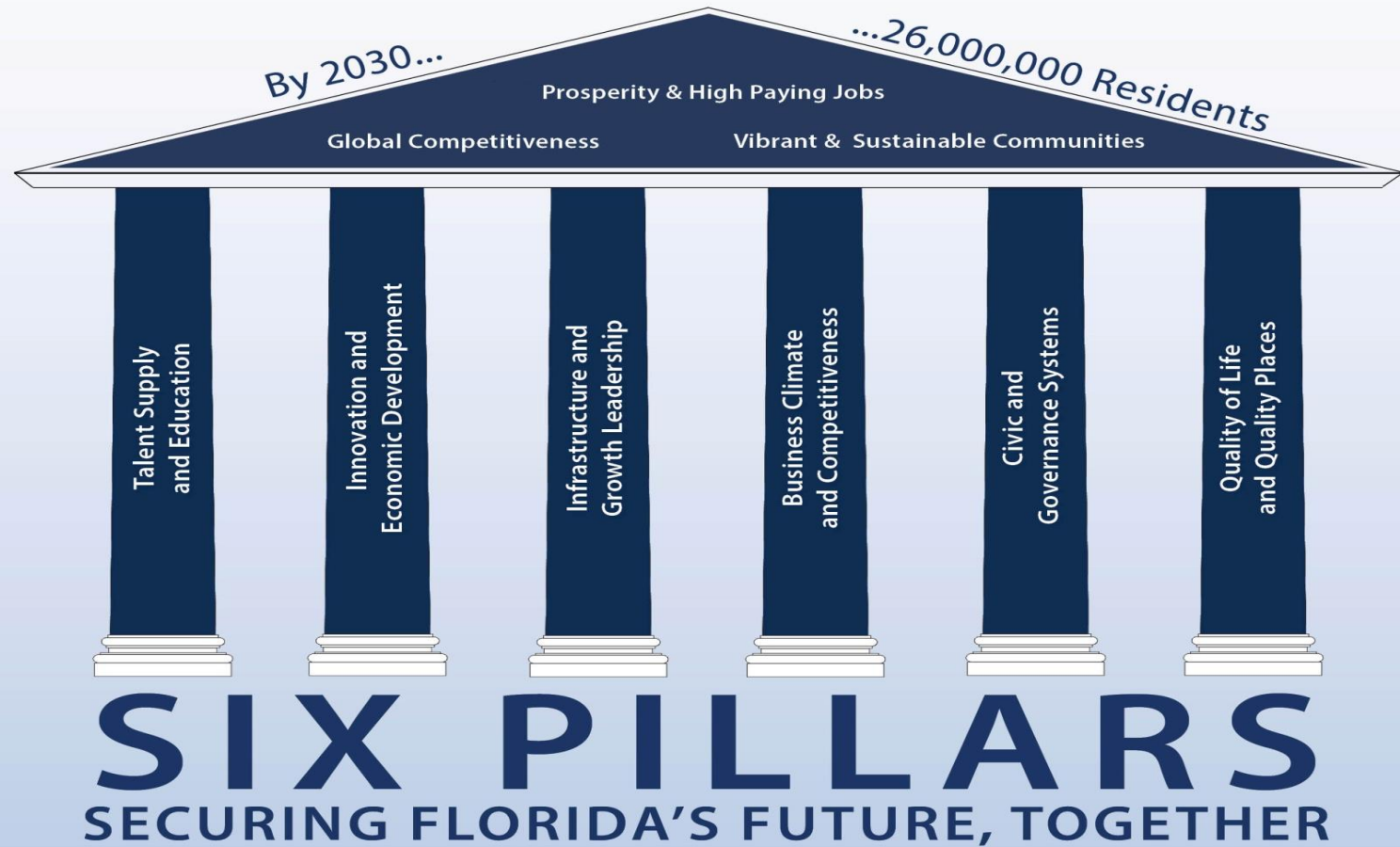




**QUALITY OF LIFE & PLACES**  
**Advisory Committee**  
**Meeting #4**  
**June 15, 2017 9:00 AM-12 Noon**

# Today's Agenda

- **Introductions**
- What have we learned so far?
- Where do we want to go?
- How do we get there?
- Next steps



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

**Florida Chamber Foundation Trustees**

**Florida 2030  
Executive Steering  
Committee**

Stakeholder,  
Association, and  
Agency Partners

Talent Supply &  
Education  
Advisory  
Committee

Innovation &  
Economic  
Development  
Advisory  
Committee

Infrastructure &  
Growth  
Leadership  
Advisory  
Committee

Business Climate  
&  
Competitiveness  
Advisory  
Committee

Civic &  
Governance  
Systems  
Advisory  
Committee

Quality of Life &  
Quality Places  
Advisory  
Committee

Caucus Members

Caucus Members

Caucus Members

Caucus Members

Caucus Members

Caucus Members

# Committee Work Plan

Date	Activity
March 22-23	Kickoff meeting #1 in Tallahassee
April 18	Joint call of all committees
April 12	Meeting #2 via webconference
May 8	Meeting #3 via webconference
June 14-15	Meeting #4 in person in Orlando
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August	Meeting #5 via webconference
September 27-29	Meeting #6 in person at Future of Florida Forum (Orlando) - review draft Pillar research report
March 2018	Rollout of Florida 2030 report

# Pillar Advisory Committee Introductions



**LEIGH COOK**  
Senior Director Futures  
Solution Lead



**SANDJAR KOZUBAEV**  
Senior Manager Futures  
Project Lead



**JONATHAN MILLER**  
Senior Consultant  
Research & Strategy



**CAROL MASSA**  
Senior Associate Futures  
Research & Strategy



**TROY SANDS**  
Vice President  
Healthcare SME



**CYNTHIA LORENZO**  
Principal  
Public Sector SME



**JOHN FLEMING**  
Analyst  
Public Sector SME

# May 8 Recap

- **Health & Wellness**

- As tail gets longer, can the economy support?
- New communities of wellness? New hospital models? Innovation?

- **Attainable Housing & Livability**

- Lending patterns – what is for sale, what can be funded
- In town unaffordable for younger families
- Talent is economic incentive of tomorrow, where they live is everything

- **Work & Prosperity**

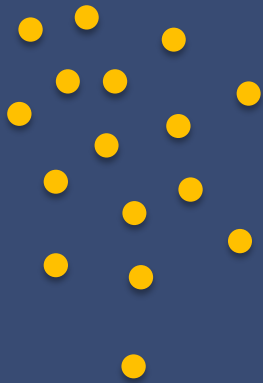
- Maker city – local movements, vertical farming, create own food
- Will work be redefined? By automation?

- **Sense of Place & Community**

- Prioritization of consuming experiences vs. goods
- Tourists – shift is occurring to adventurism, back to nature, eco-tourism, natural resources
- Walkable streets – safe, free to congregate, health and community building environments

# Pillar Research Process

The research framework captures and brings organization to naturally-occurring relevant signals. The signals are synthesized into underlying drivers of change that will be used to frame pillar opportunities, strengths, and action areas.



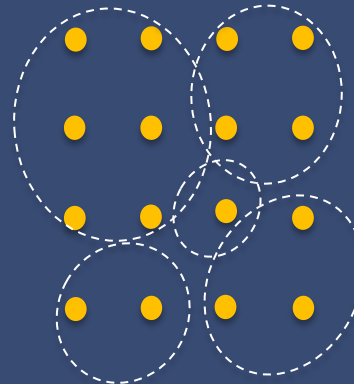
## Data Collection

Collection of relevant signals (today, emerging, weak)



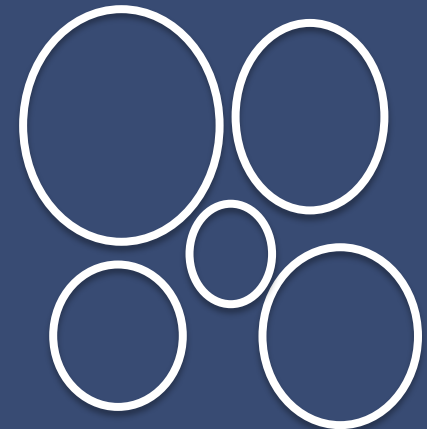
## Sorting

Systematic classification of signals into STEEP model and identification of key tensions



## Clustering

Development of thematic clusters and themes to outline key drivers of change per global region



## Drivers of Change

Pillar specific clusters that capture key themes that underlie plausible futures



# Futures Session Overview

The Futures Session explored possible futures and drove consensus through scenario generation, storytelling and concepting exercises. We will use the output to co-create and align on the final vision and strategies.

## SYNTHESIS AND DEVELOPMENT

- Identify change driver cards
- Summarize insights

## FUTURE SCENARIO DEVELOPMENT

- Introduce futures to the audience
- Build scenarios across change drivers and each pillar

## DOCUMENTATION AND FINAL REPORT

- Share draft with 6 PAC and collect feedback
- Develop report for each pillar



# Today's Agenda

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# Quality of Life and Places: Themes

## New American Identity



Ability to adapt to the shifting cultural, economic and social American identity will impact a state's attractiveness to new residents.

## Creative Value



The arts can become a key component for enriching community experiences and improving economic competitiveness.

## Going Beyond Health



Despite the controversial national healthcare debate, a state policy needs to focus on pragmatic, holistic and novel approaches to human wellbeing.

## Places Of The Future



Citizens want the built environment to facilitate a seamless exchange of services, products, connectivity and mobility.

## Reconfiguring Community



Citizens' expectations from a fulfilling community life are changing as they are exposed to a wider variety of community experiences (networked, virtual, cultural, professional, etc.).

## Tourist Attraction



Florida's current image needs to evolve and offer a greater diversity of visitor experiences across the state in terms of their duration, meaning and significance.

## Sustaining Life



Life-supporting systems (water, energy, food) need more proactive management strategies to accommodate future growth and prosperity for all.

# What Have We Learned So Far?

**For each theme, discuss and consider the following:**

- What are the other uncertainties and/or other signals that could impact this driver of change?
- What are the most important factors that would:
  - Enable Florida to be a top 10 economy globally by 2030?
  - Drive a pathway to prosperity for all zip codes in the state by 2030?
  - Allow Florida's communities to lead the nation and world as places to live, work, and visit?

# Going Beyond Health

## Signals of Change

### AI Health

AI is transforming the health sector. FDA approval is pending for an AI-based cancer diagnostic and AiCure uses AI to confirm clinical trial patients take their medications.

### Physician Capacity

A 2014 survey found most doctors have little or no room to add patients, with 81% of physicians describing themselves as “either over-extended or at full capacity.”

Social

Technological

Economic

Environmental

Political

### Prescription Food

A health provider is prescribing healthy food to diabetics. The program costs \$1K per patient per year, but saves \$8K for every point decrease in patient A1C levels.

### A Better Death

Polls find that most people in good health hope they will die at home. Yet, 1/3 of Americans who die after age 65 will have spent time in an ICU in their final three months.

### Virtually Healthy

The global telemedicine market is poised to grow at a CAGR of around 16.3% over the next decade, to reach \$78.3 billion by 2025.

### Happiness as Policy

In 2016, the United Arab Emirates created a new role - the Minister of Happiness - whose aim is to pursue programs and policies that promote overall happiness.

## State of Florida

### Data Bank

According to the CDC, 13.8% of the population lacked health insurance in 2016 (U.S. avg: 9%).

Florida will need an additional 4,671 primary-care physicians by 2030.

The share of active physicians age 60+ was 11<sup>th</sup> highest in the nation.

Florida has top 10 retention rates from in-state medical education programs.

In 2015, Floridians accounted for about 12% of total opioid deaths in the U.S.

### Key Tensions



Talent



Cost



Wellness

# Places of the Future

## Signals of Change

### Affordable Housing?

In the U.S., 11 million households spend over 50% of their income on rent and by 2025, 2.2 million subsidized units will be eligible for conversion to market-rate units.

### Alternative Transport

The future of transport will include options such as Hyperloop, self-driving cars, and taxi drones. These modes will need funding, vision, and infrastructure to succeed.

Social

Technological

Economic

Environmental

Political

### “Urbanizing” Suburbs

Recent data shows suburban areas are growing faster than urban areas and to compete, suburbs are offering urban amenities, such as multi-modal transportation options.

### Smart Buildings

In the U.S., buildings account for 40% of total CO2 emissions. Smart energy management is placing new expectations on buildings to be stewards of conservation.

### Taking Back the Streets

Cities are pursuing innovative ways to reclaim their streets from car dominance. Barcelona’s plan for superblocks will reduce traffic by 21% and free up 60% of streets.

### Parking Repurposed

Metro growth supports the automobile as the primary mode of transportation. Social, economic, and tech forces are disincentivizing auto-centric development.

## State of Florida

### Data Bank

The share of Floridians spending 30% or more of their monthly income on housing decreased from 48% in 2010 to 40% in 2015 (U.S. avg: 33%). Affordable housing is particularly severe in South Florida.

Florida ranks among the top 10 densest states and Miami is the sixth densest city in the U.S. (of metros with pop>1M).

According to FDOT, vehicle miles traveled is outpacing population growth and increasing demand on road infrastructure.

### Key Tensions



Growth



Retrofits



Resiliency

# Tourist Attraction

## Signals of Change

### Where Are You Going?

The global tourism market is increasingly distributed. Of the top 20 destinations by international visitors, 10 were in Asia, eight were in Europe, and two were in the U.S.

### Seeking Authenticity

Tourists are seeking to experience the “true sense” of destinations. Tourists are paying for experiences living in slums, touring toxic sites, and visiting sites of famous deaths.

Social

Technological

Economic

Environmental

Political

### Virtual Parks

Virtual reality and augmented reality threaten to democratize the theme park experience. However, theme parks are adding VR aspects to rides to differentiate.

### Shared Experiences

In the shared economy, anyone can be a host, tour guide, driver, or hotelier. Yet, this shift means there is more competition for spending and hospitality jobs may be lost.

### Space Tourism

If space tourism goes mainstream, communities with launch assets may be early winners. Creating a total experience and the talent to support the industry will be critical.

### Negative Avoidance

Negative avoidance is the tendency to avoid situations that have resulted or could result in unwanted outcomes. Tourism is very sensitive to terrorism, disease, and unrest.

## State of Florida

### Data Bank

In 2016, Florida hosted 112.8 million tourists, a 5.9% increase over 2015. Of total visitors, 98M (87%) were domestic.

Domestic tourism increased by 7.3%, but international declines were observed from top nations: Argentina (-4%), Brazil (-29%), and Canada (-15%).

Primary domestic tourist origins: Georgia (9.6% of total), New York (9.3%), and Texas (6%).

Tourists spent \$109B in Florida in 2016 and the sector supported 1.4M jobs.

### Key Tensions



Transportation



Branding



Portfolio

# Reconfiguring Community

## Signals of Change

### Online Community

Approximately 68% of U.S. adults use Facebook. However, a recent study found that 37% of social media users feel worn out by political content they encounter.

### Smart City

Smart cities will be transformative, but they rely on resident data. A recent poll found that 93% of adults say controlling who can get info about them is important.

Social

Technological

Economic

Environmental

Political

### To Telework?

The number of people who telecommute to work has steadily been increasing and it is rated among the top business perks. The value of office space may decline.

### Or Not To Telework?

Research shows that employees who have more chance encounters and unplanned interactions perform better. IBM, which is known for its telework, is phasing out the option.

### Economic Identity

The decline of traditional manufacturing is prompting a new search for local economic identity. Some cities are finding success in supporting small manufacturers.

### Closer Together

Cohousing communities are on the rise, where homes are designed around shared spaces and residents share responsibility for meals, childcare, and rulemaking.

## State of Florida

### Data Bank

The Villages is a community for people age 55+. Home to more than 100K the Villages is known for its golf cart connectivity, golf courses, and growth.

Babcock Ranch is a planned community offering residents sustainable and connected living via utility-scale solar generation and gigabyte fiber-optic connectivity.

Lakeland recently broke ground on a micro-cottage community for seniors.

There are currently six cohousing communities forming in Florida.

### Key Tensions



Technology



Options



Generations



# New American Identity

## Signals of Change

### Job Automation

A recent study shows that up to 40% of jobs could be lost due to automation. Anxieties about job security can influence sense of identity and social attachment.

### National Identity

A poll recently found that 70% of Democrats and Republicans think the U.S. is losing its national identity. However, they disagree on the role of diversity as a core tenet.

Social

Technological

Economic

Environmental

Political

### Geography of Family

Young adults are more likely to be living with their parents than another arrangement. Young adult geographic mobility is at its lowest level in 50 years.

### Intermarriages

In 2017, 15% of newlyweds were intermarried compared to 3% in 1967. If this trend continues, it will effectively reframe what it means to belong to one race or another.

### Loneliness Epidemic

Since the 1980s, adults who say they are lonely has increased from 20% to 40%. Loneliness is associated with higher risks of heart disease, stroke, and early death.

### Independent Voters

The share of voters who identify as political independents has been rising since 2004 and reached 42% of voters in 2016. However, the power of this trend is still uncertain.

## State of Florida

### Data Bank

Florida is the third largest state and its population is projected to grow to 24.2 million by 2030.

The Hispanic population is the third largest in the nation and accounts for 24% of all persons.

The share of voters who were registered as a 3<sup>rd</sup> party or independent increased from 17% to 27% (2000-2016).

Florida ranks fifth of the 50 states in income inequality, based on the ratio of top 1% to bottom 99% income.

### Key Tensions



Demographics



Connections



Inequality

# Creative Value

## Signals of Change

### Culture Capital

Miami was named to the 15 Most Influential Art World Cities list, is one of three cities to host Art Basel, and hosts one of five officially recognized Fashion Week events.

### Making Makers

The Maker Movement has increased demand for maker spaces, which are dedicated studios for small manufacturing, tinkering, and crafting.

Social

Technological

Economic

Environmental

Political

### Value of Experience

In 2015, paid and ad-supported music streaming generated \$3.9 billion in revenue, while live music generated \$9.3 billion. Since 1998, consumer ticket spending doubled.

### Creative Education

The UAE launched the region's first design institute to help build the talent base needed to diversify its economy and grow in a more sustainable manner.

### Art Districts

A study of 89 cities showed that cultural districts increase media/arts patents and sector innovation. Art districts increase property value and attract investment.

### Arts for Healing

Art programs have been used to serve veterans after they return from service. Arts-based healing can help build confidence and self-esteem by focusing on strengths.

## State of Florida

### Data Bank

Florida appropriations for arts and culture peaked in FY2015 when funding exceeded \$40 million, but has been on the decline.

Florida is one of 28 states with Percent for Art programs. The program requires that up to 0.5% of construction appropriation is used to acquire artwork for permanent display in the interior or exterior of public access facilities.

Nonprofit arts and culture industry generated \$3.1 billion in economic activity, according to a 2009 study.

### Key Tensions



Who Pays?



Perception



ROI

# Sustaining Life

## Signals of Change

### Access to Food

The USDA estimates that 24 million people live in food deserts. In Atlanta, the mayor committed to reducing food deserts by 75% by and is creating a community forest.

### Reconnect with Food

Cooking homemade food is associated with a healthier diet. Meal delivery, DIY kits, and CSAs empower consumers to try different ways of eating and food shopping.

Social

Technological

Economic

Environmental

Political

### Water Quality & Access

Nearly 30M people have been accessing water from systems with contaminant violations. In Flint, MI over 8K children have been exposed to high-levels of lead.

### Urban Ag

The average American meal travels 1,500 miles from farm to plate. Seeking ways to decrease the distance, people experimenting with new forms of growing.

### Waste Management

According to the UN, approximately 1.3B tons of food is wasted every year. Urban areas must think about waste streams and some may even leverage it as an amenity.

### Alternative Proteins

Insects currently feed about 2 billion people each day. In March 2016, cricket-based protein bar maker Exo, secured \$4 million in Series A funding.

## State of Florida

### Data Bank

In a survey of Floridians on water, 83% of respondents ranked water as a highly or extremely important issue.

Florida's primary source of potable water is a groundwater-charged aquifer. Saltwater intrusion, especially in South Florida, is a real threat to the long-term sustainability of the water source.

A 2014 study found that a one percentage point reduction in the share of the population without healthy food access in Florida could prevent 600+ premature deaths over a seven-year period.

### Key Tensions



Scale



Policy



Differentiation

# Today's Agenda

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# Where Do We Want to Go?

**Review each FL 2030 PRELIMINARY Vision & Strategy worksheet (per driver of change), discuss and capture feedback:**

### Florida 2030 | Going Beyond Health

Despite the controversial national healthcare debate, a state policy needs to focus on pragmatic, holistic and novel approaches to human wellbeing.

**Vision Statement:**  
By 2030, Florida will establish a healthcare system that is preventive, efficient and person-centric and more transparent. The system rewards a holistic approach to health and wellbeing by incentivizing exchange of value flows between payers, providers and patients.

SHORT-TERM ACTIONS	MID-TERM ACTIONS	LONG-TERM ACTIONS
<p><b>Focus on access</b></p> <ul style="list-style-type: none"><li>Identify key gaps in the healthcare system that are unique to the state</li><li>Align vision around on how to improve citizen's health and wellness experiences</li><li>Promote collaborative initiatives on prevention and proactive care</li></ul>	<p><b>Streamline the process</b></p> <ul style="list-style-type: none"><li>Coordinate and develop an agreed upon a set of metrics to measure outcomes that benefit citizens</li><li>Promote a change in culture away from process towards outcomes</li><li>Incentivize constant iteration of the metrics to adequately reflect the evolving needs of the patient</li></ul>	

### Florida 2030 | Places of the Future

Citizens want the built environment to facilitate a seamless exchange of services, products, connectivity and mobility.

**Vision Statement:**  
By 2030, Florida will emerge as the leading state in urban and multimodal infrastructure innovation. The new built environment of Florida is a seamless and integrated network in which citizens thrive and participate and businesses prosper.

SHORT-TERM ACTIONS	MID-TERM ACTIONS	LONG-TERM ACTIONS
<p><b>Assess transportation needs</b></p> <ul style="list-style-type: none"><li>Solicit feedback from community leaders to identify key issues</li><li>Study the emerging behaviors of citizens to understand evolving needs related to the built environment (spaces, communities, infrastructures)</li><li>Develop a comprehensive plan to encourage future investments in multimodal transportation</li></ul>	<p><b>Test novel ideas</b></p> <ul style="list-style-type: none"><li>Launch experimental spaces to test effectiveness and viability</li><li>Target a few cities or communities for one-off tests</li><li>Validate needs and desires of the community during the tests</li><li>Identify key best practices to roll out state wide</li></ul>	<p><b>Scale and strengthen solutions</b></p> <ul style="list-style-type: none"><li>Expand new alliances between state and local governments and planners to take advantage of the most effective solutions</li><li>Support innovative transportation funds that expand the new infrastructure and solutions vertically and horizontally</li></ul>

SPARKSGROVE. NORTH HIGHLAND

FLORIDA 2030  
FLORIDA CHAMBER FOUNDATION

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FLORIDA 2030  
FLORIDA CHAMBER FOUNDATION

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# Where Do We Want to Go?

**Discuss and capture feedback keeping in mind the following:**

- What would this pillar look like if Florida is a top 10 economy globally by 2030?
- What would this pillar look like if we had a pathway to prosperity for all zip codes in the state by 2030?
- What would this pillar look like if Florida's communities lead the nation and world as places to live, work, and visit?
- How should we measure success in 2030?

# Today's Agenda

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# How Do We Get There?

**Discuss and capture top 3-4 goals for this pillar by 2030 and how we would measure success.**

**As time permits, discuss and capture the following:**

- What key issues need attention?
- What major risks do we face?
- What could disrupt progress?
- What should we keep doing?
- What should we be doing differently?



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**1,000s** of Floridians

**6** Pillars

**2** Years

**1** Plan

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