



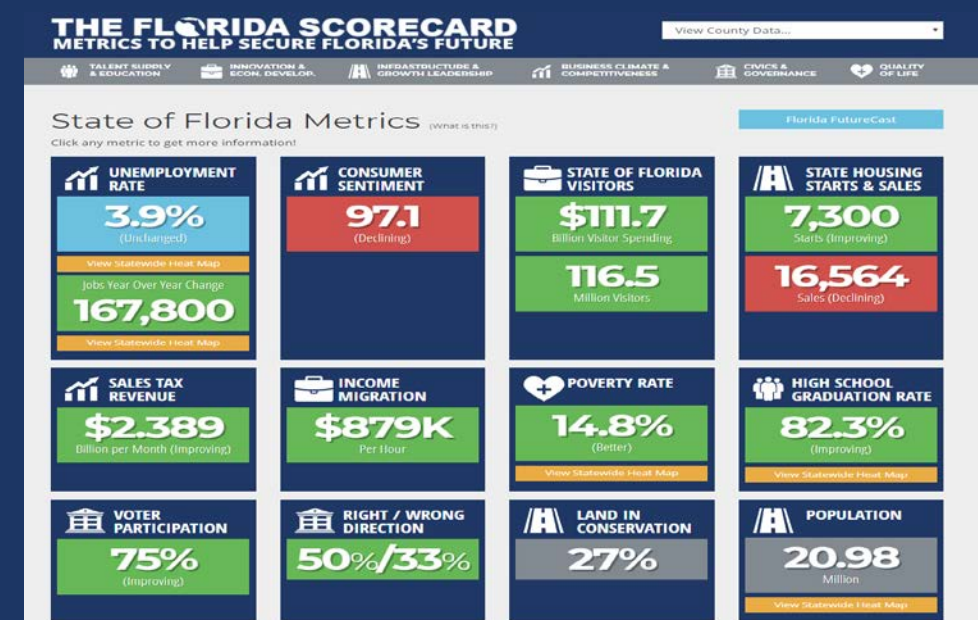
State of Change

Florida's Changing Economic, Demographic
& Political Landscape and Why It Matters

Unifying The Business Community

**FLORIDA
CHAMBER**
Foundation

Solutions
(Research)



**FLORIDA
CHAMBER**
of Commerce

Actions (Lobbying
& Grassroots)



**FLORIDA
CHAMBER**
Political Action

Leadership
(Elections)



The Framework For Florida's Future

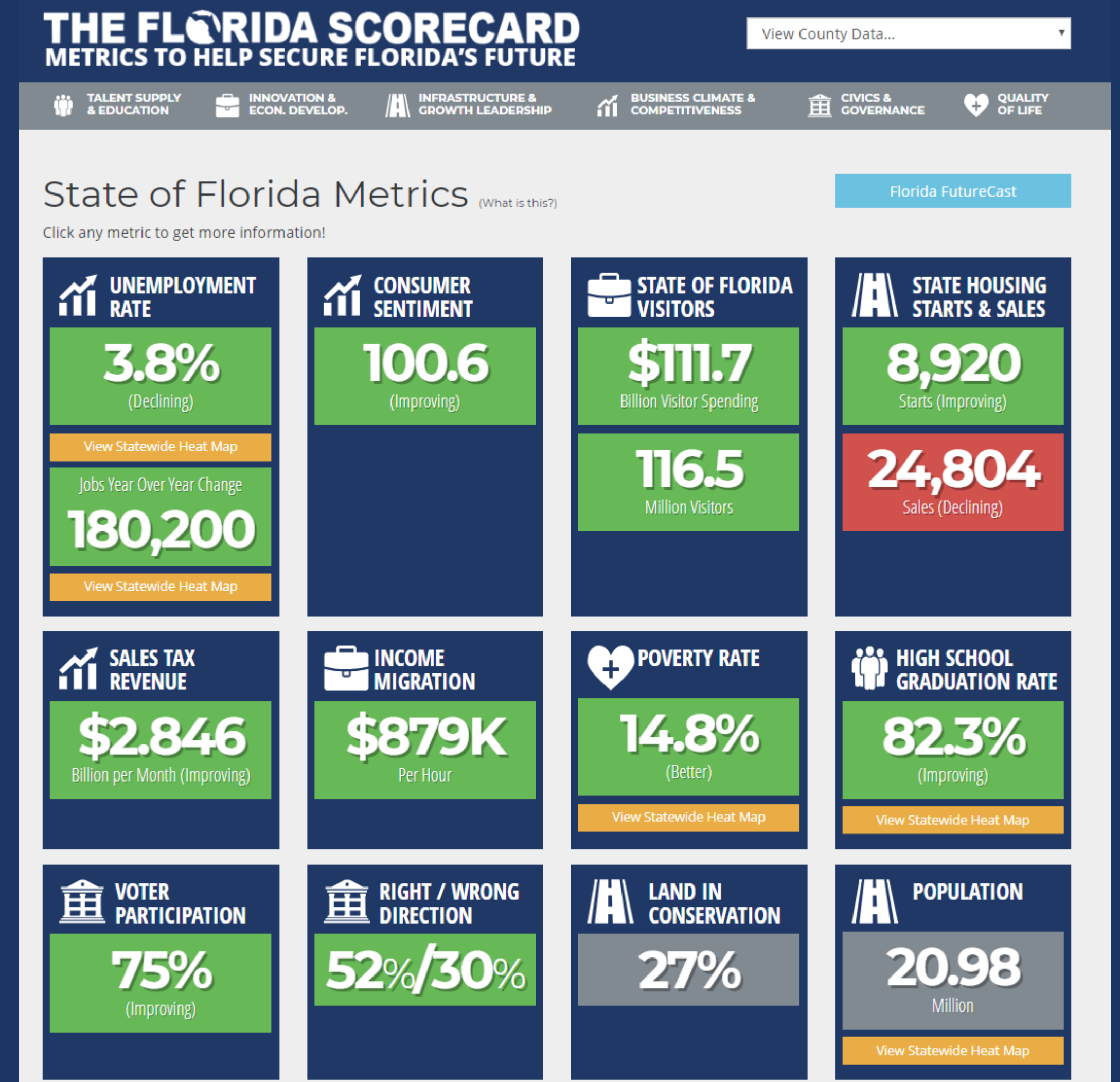


“Florida is changing. Our ECONOMICS, our demographics and our politics are all changing and these changes are both opportunities and challenges.” – Mark Wilson

“Our mission is to lead Florida to a new and sustainable economy.”

You Can't Manage What You Don't Measure

- Florida's Economy **\$976.7 Billion** GDP (17th / \$1T in 2018)
- **20.98 Million** Residents (3rd /+5M by 2030 /+898/day)
- **180,200** Private-Sector Jobs Created in Florida in the Past Year
- Florida creates more than **1-out-of-every-14** jobs in the U.S.
- **116.5 Million** Visitors in 2017
- **3.8%** Unemployment Rate



State of Florida Metrics (What is this?)

Florida FutureCast

Click any metric to get more information!

 UNEMPLOYMENT
RATE

3.8%
(Declining)

[View Statewide Heat Map](#)

Jobs Year Over Year Change

180,200

[View Statewide Heat Map](#)

 CONSUMER
SENTIMENT

100.6
(Improving)

 STATE OF FLORIDA
VISITORS

\$111.7
Billion Visitor Spending

116.5
Million Visitors

 STATE HOUSING
STARTS & SALES

8,920
Starts (Improving)

24,804
Sales (Declining)

 SALES TAX
REVENUE

\$2.846
Billion per Month (Improving)

 INCOME
MIGRATION

\$879K
Per Hour

 POVERTY RATE

14.8%
(Better)

[View Statewide Heat Map](#)

 HIGH SCHOOL
GRADUATION RATE

82.3%
(Improving)

[View Statewide Heat Map](#)

 VOTER
PARTICIPATION

75%
(Improving)

 RIGHT / WRONG
DIRECTION

52%/30%

 LAND IN
CONSERVATION

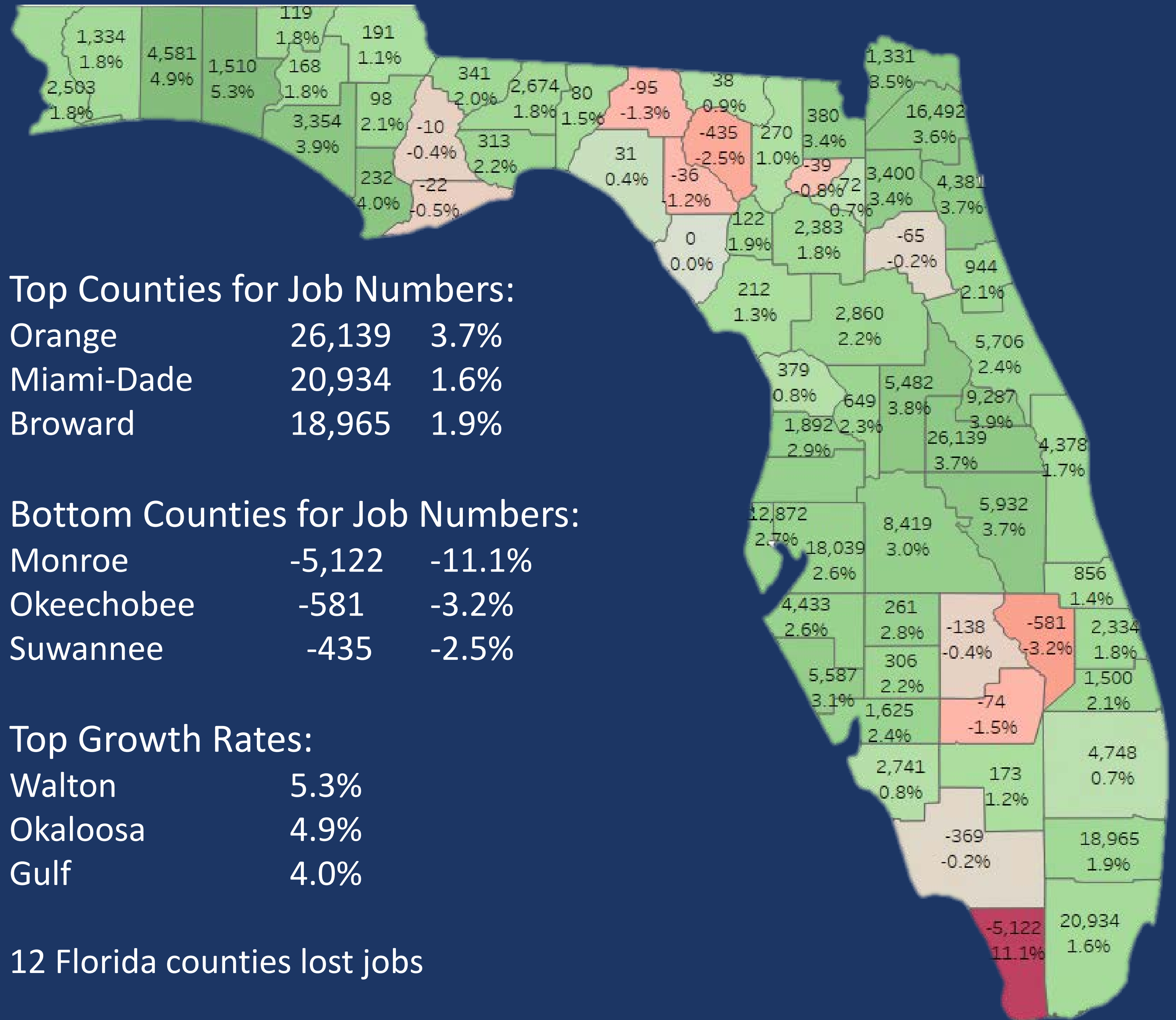
27%

 POPULATION

20.98
Million

[View Statewide Heat Map](#)

U.S.: 1.6% Job Growth



Florida Year-over-year Job Creation by Industry May '17 to May '18

Data Source: U.S. Bureau of Labor
Statistics

Industry	May '17 to May '18 FL Jobs Created	Florida's Percent Growth	FL: 1 of How Many in the U.S.?
Total	180,200	2.1%	1 of 13.5
Construction	31,300	6.2%	1 of 9.5
Manufacturing	12,100	3.3%	1 of 17.6
Trade, Transportation & Utilities	15,400	0.9%	1 of 24.7
Financial Activities	17,200	3.1%	1 of 6.4
Professional & Business Services	39,200	3.0%	1 of 11.4
Education & Health Services	24,500	1.9%	1 of 18.1
Leisure & Hospitality	37,200	2.9%	1 of 9.5
Government	1,200	0.1%	1 of 80.3

Miami - Fort
Lauderdale –
Palm Beach
MSA

Job Gains from
2010 through
2017 by
Industry

Industry – 2010 to 2017	Job Gains	Percent
Total Nonfarm	432,200	19.2%
Private	433,000	22.4%
Construction	46,300	53.2%
Manufacturing	15,400	17.7%
Trade, Transportation & Utilities	90,900	17.2%
Information, Comms. & Digital Tech	6,400	14.5%
Financial Activities	25,500	16.3%
Professional & Business Services	106,400	31.6%
Education & Health Services	54,900	16.1%
Leisure & Hospitality	63,700	24.4%
Government	-800	-0.3%

“Florida is changing. Our economics, our **DEMOGRAPHICS** and our politics are all changing and these changes are both opportunities and challenges.” – Mark Wilson

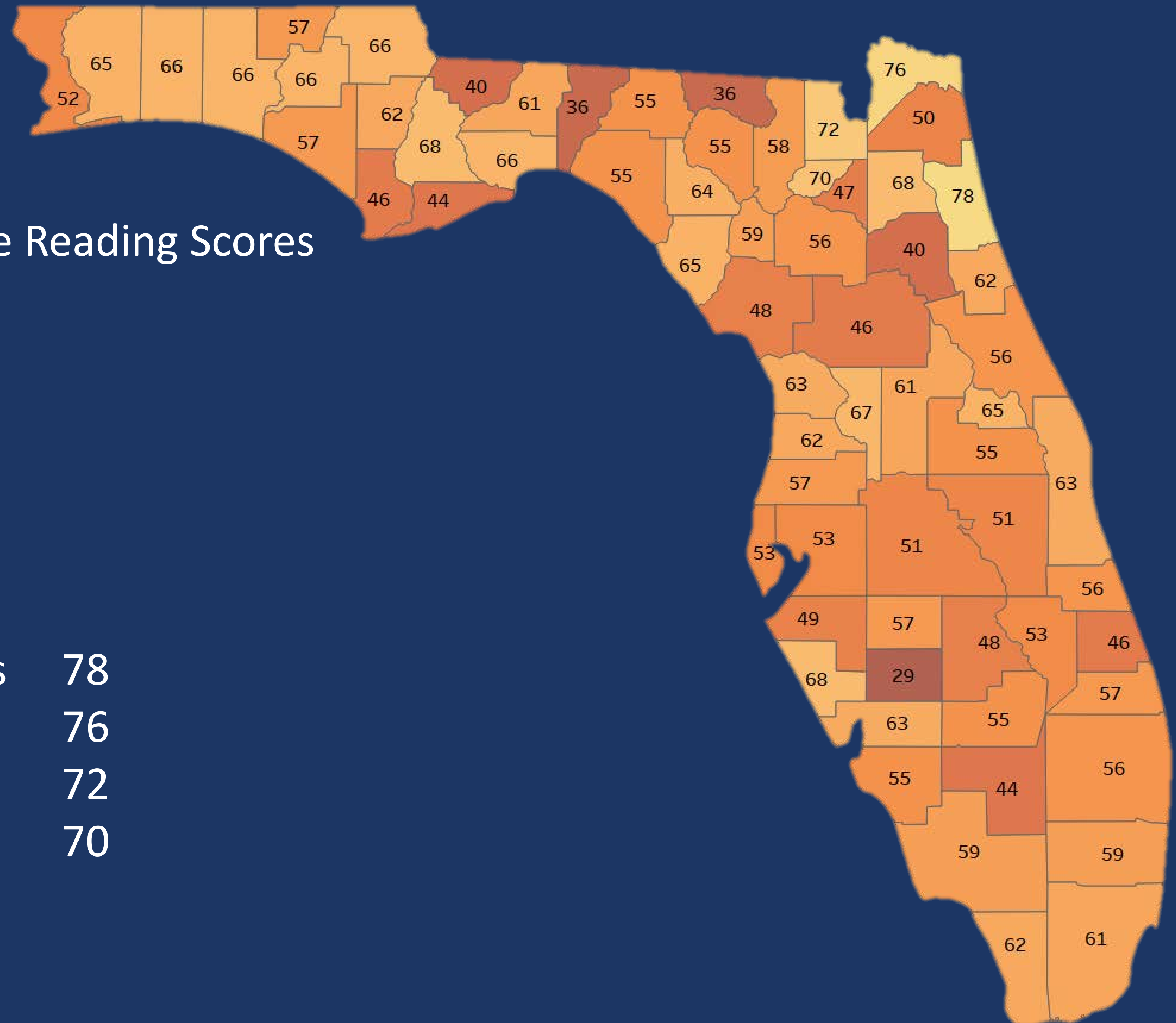


Florida's 2018 3rd Grade Reading Scores

Florida Average: 57
Range: 29 to 78

Top Counties:

- | | |
|--------------|----|
| 1. St. Johns | 78 |
| 2. Nassau | 76 |
| 3. Baker | 72 |
| 4. Union | 70 |

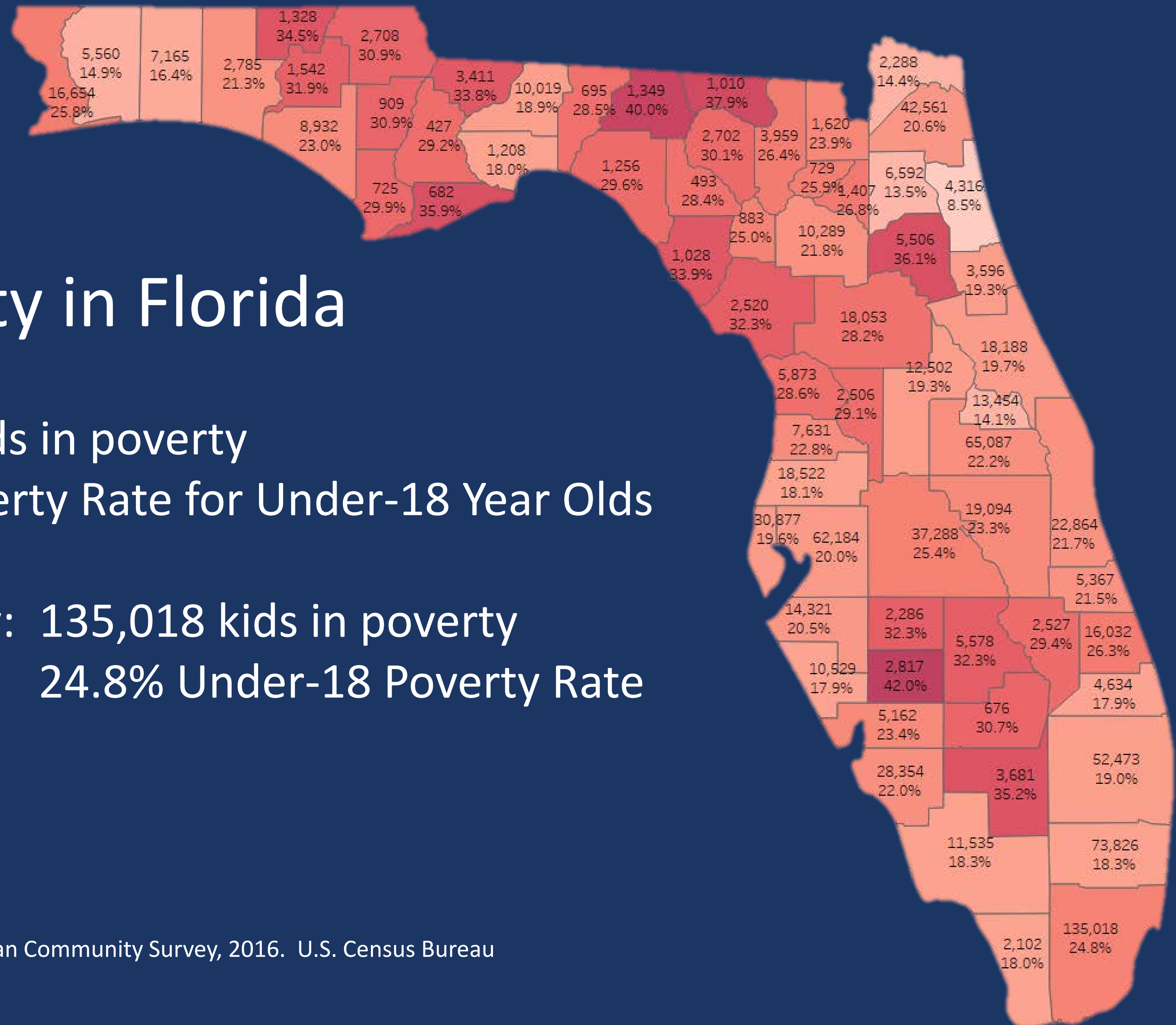


Kids in Poverty in Florida

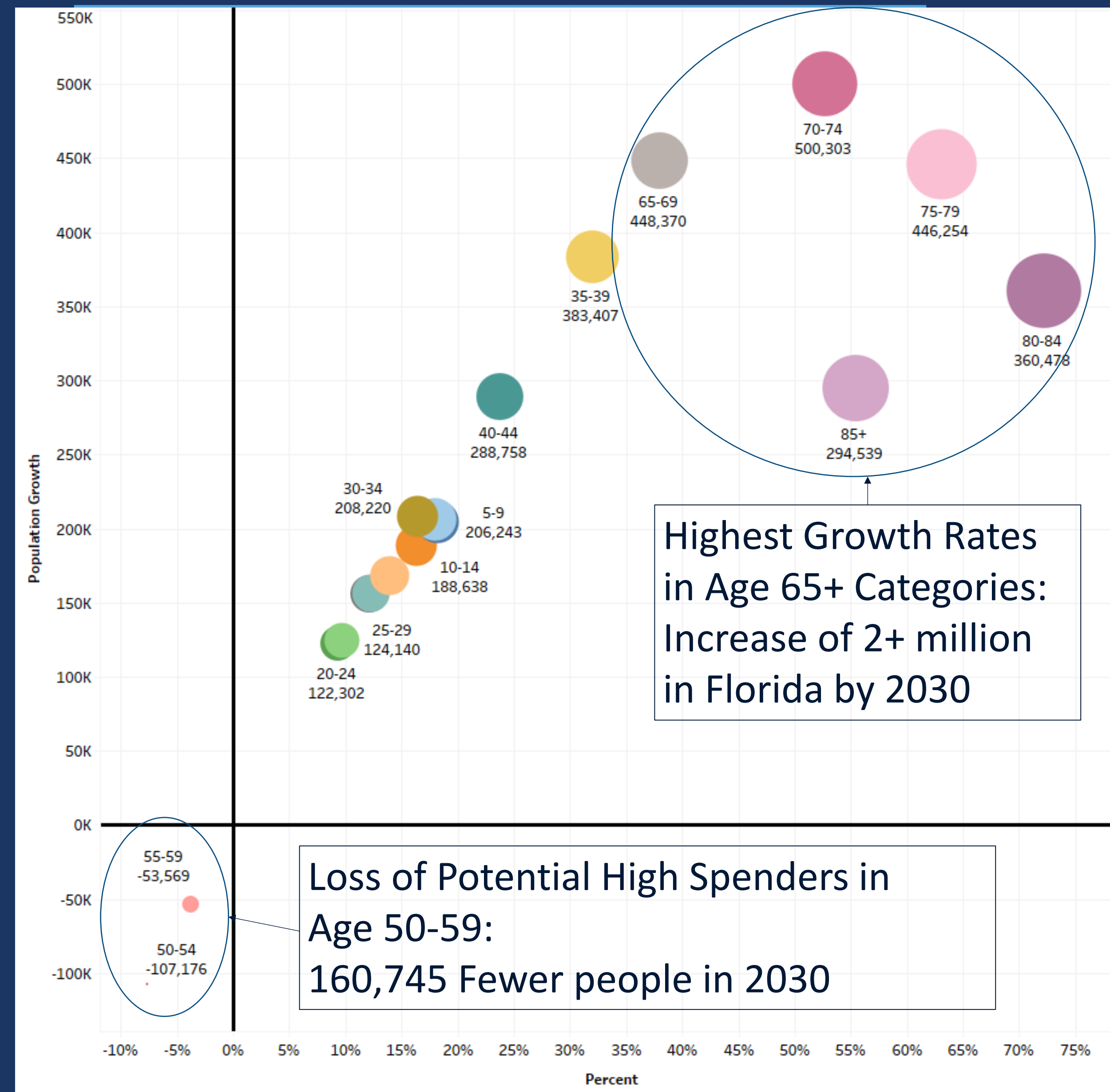
Florida: 869,892 kids in poverty
21.3% Poverty Rate for Under-18 Year Olds

Miami-Dade County: 135,018 kids in poverty
24.8% Under-18 Poverty Rate

Data: American Community Survey, 2016. U.S. Census Bureau



Population Changes by Age Group 2016-30





Miami-Dade County Metrics (What is this?)

Florida FutureCast

Click any metric to get more information!



UNEMPLOYMENT
RATE

4.0%
(Declining)

With Disability (2014) **18.8%**

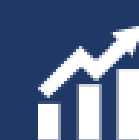
Jobs Year Over Year Change
20,934

[View Statewide Heat Map](#)



HOUSING
PERMITS

2,873
Permits (Improving)



SALES TAX
REVENUE

\$451.46
Million per Year (Improving)



WEALTH
MIGRATION

(\$292.22)
Million per Year



POVERTY RATE

18.2%
(Better)

[View Statewide Heat Map](#)



HIGH SCHOOL
GRADUATION RATE

80.7%
(Improving)

[View Statewide Heat Map](#)



LAND IN
CONSERVATION

68%



POPULATION

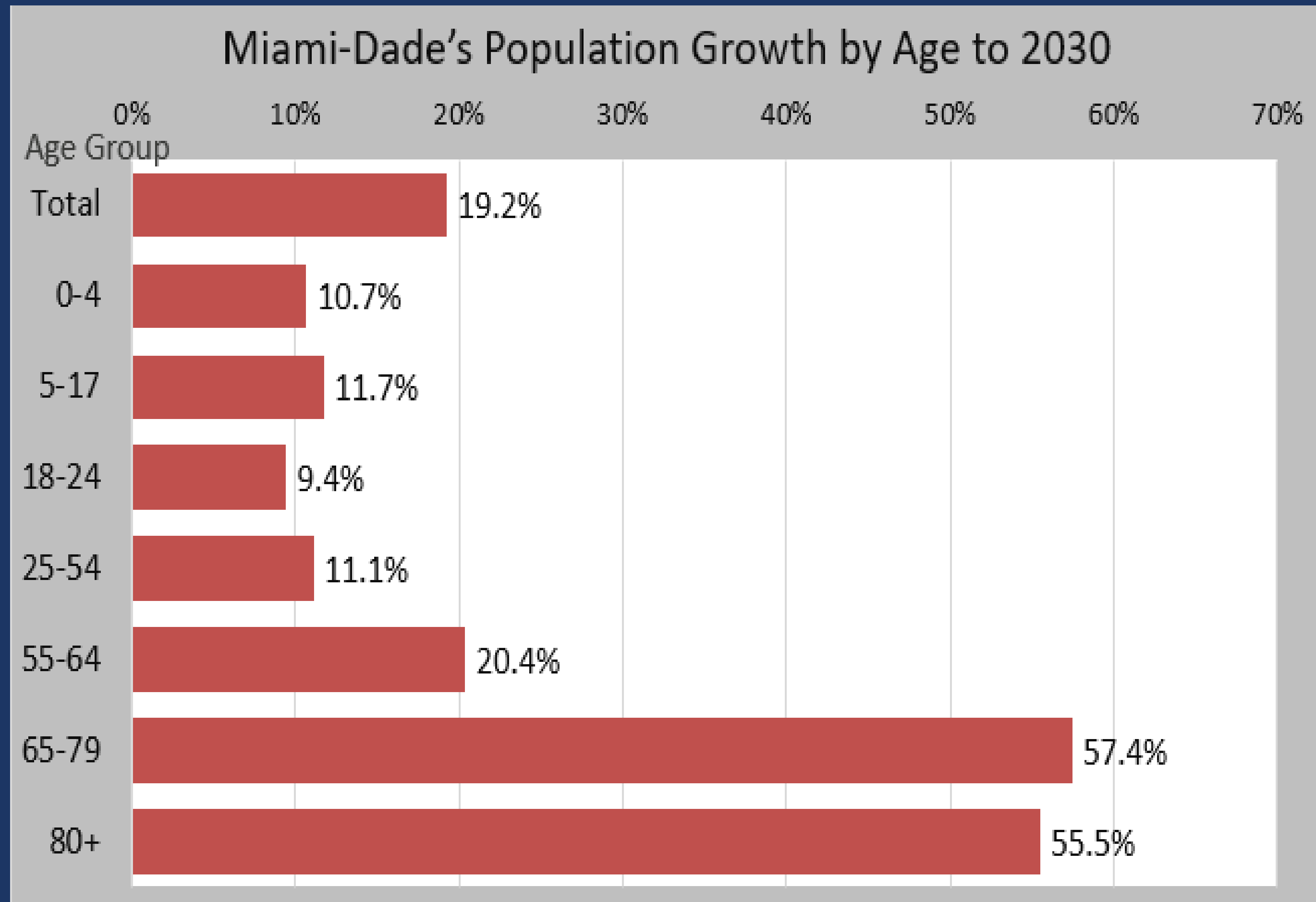
2.74
Million

[View Statewide Heat Map](#)

Population Change Forecast – Miami-Dade 2030

	Total	Female	Male	Over 65	Percent over 65
Overall	519,225	266,776	252,449	238,613	46.0%
Non-Hispanic White	-61,385	-30,219	-31,166	4,303	-7.0%
Non-Hispanic Black	49,649	26,464	23,185	39,078	78.7%
Hispanic	526,162	267,844	258,318	191,128	36.3%
Other	4,799	2,687	2,112	4,104	85.5%

Expected Population Growth by Age Group



Lower Forecast

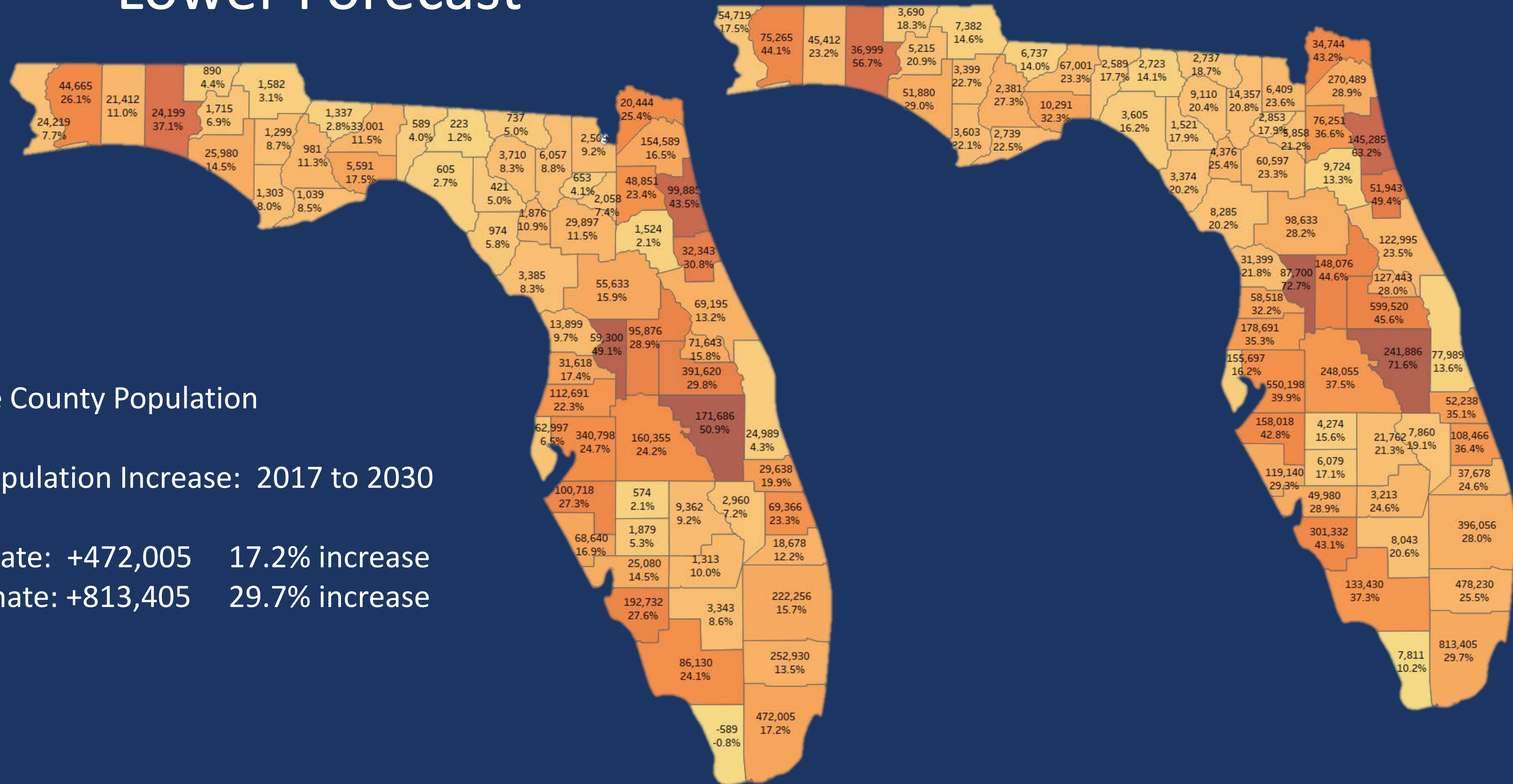
Higher Forecast

Miami-Dade County Population

Expected Population Increase: 2017 to 2030

Lower Estimate: +472,005 17.2% increase

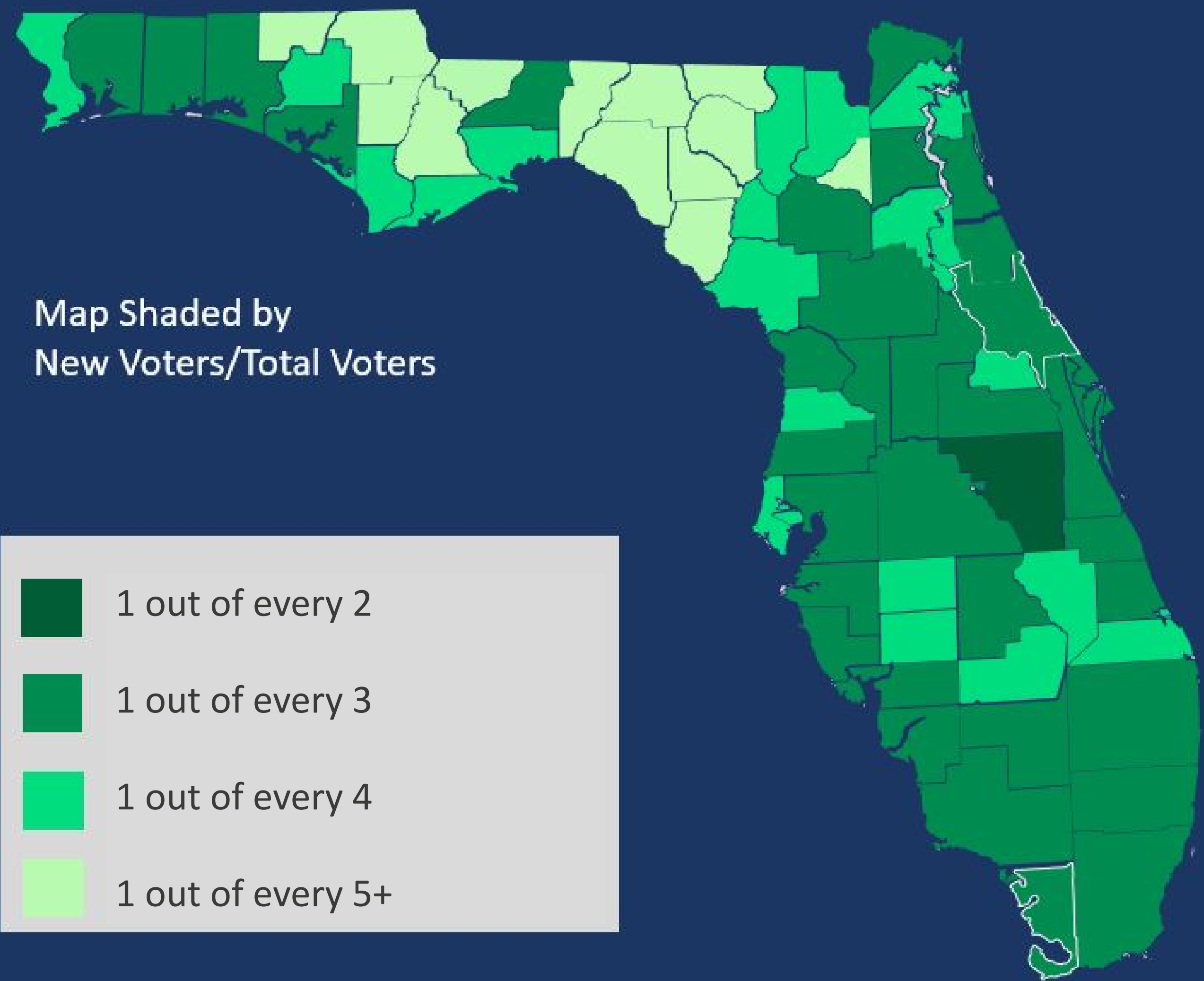
Higher Estimate: +813,405 29.7% increase



“Florida is changing. Our economics, our demographics and our POLITICS are all changing and these changes are both opportunities and challenges.” – Mark Wilson



Scott Era: New Voters



Statewide	4,345,027
Men	1,978,985 (46%)
Women	2,131,406 (49%)
Republicans	1,223,894 (28%)
Democrats	1,418,565 (33%)
NPA/Others	1,665,177 (38%)
White	2,477,996 (57%)
Black	540,415 (12%)
Hispanics	907,417 (21%)

Florida Chamber Political Analysis – Voter Trends

Since 2016 Election

702,209 New Registered Voters

44% - No Party Affiliation
27% - Democrat
29% - Republican

“NO PARTY” IS WINNING

May 2018 Voter Registration Stats

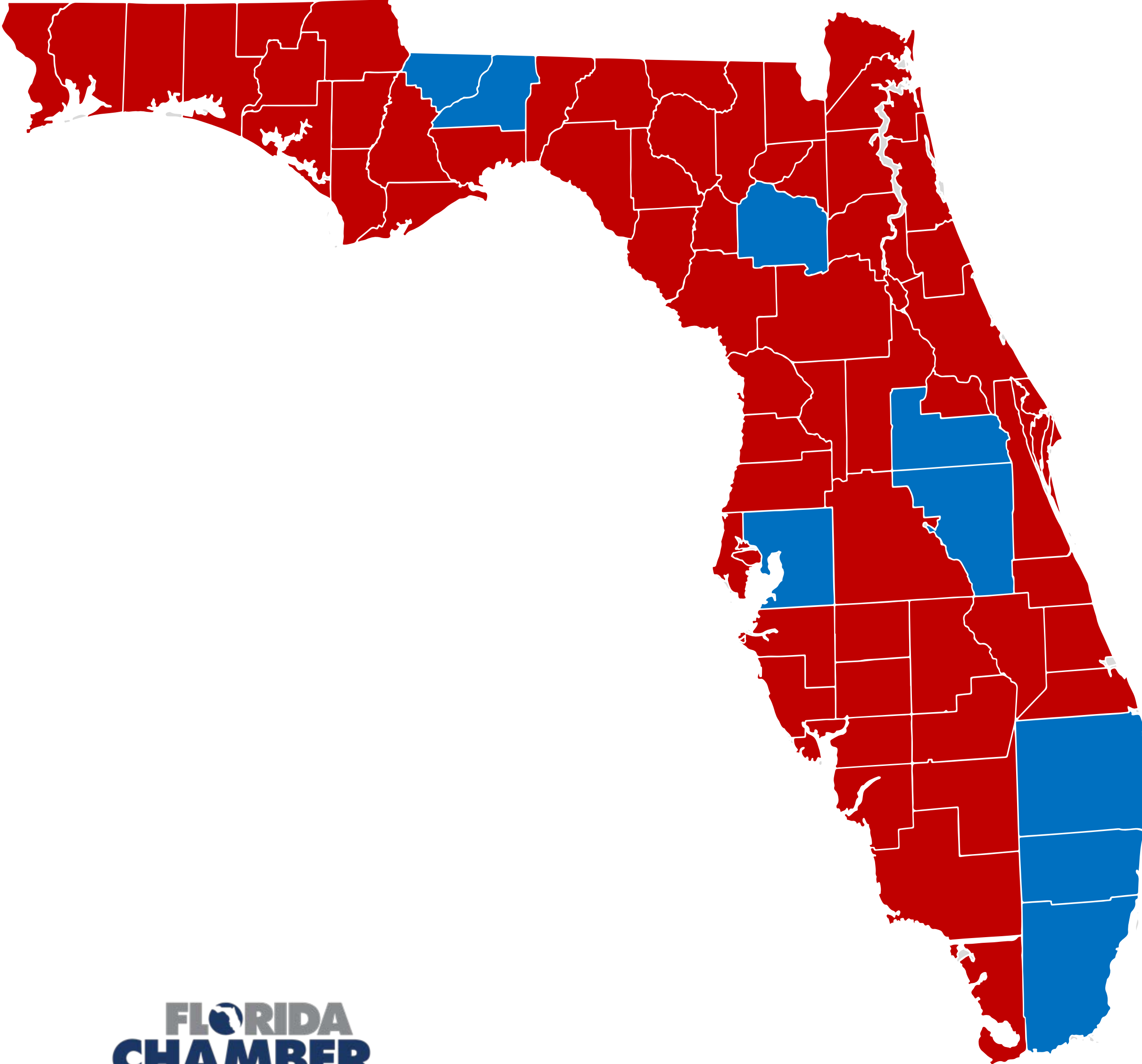
48,199 New Registered Voters

45% - No Party Affiliation
30% - Democrat
26% - Republican

41 Counties – NPA highest # of registrants
22 Counties – Republican highest # of registrants
4 Counties – Democrat highest # of registrants

The Trump Map

By County (9 Clinton – 58 Trump)



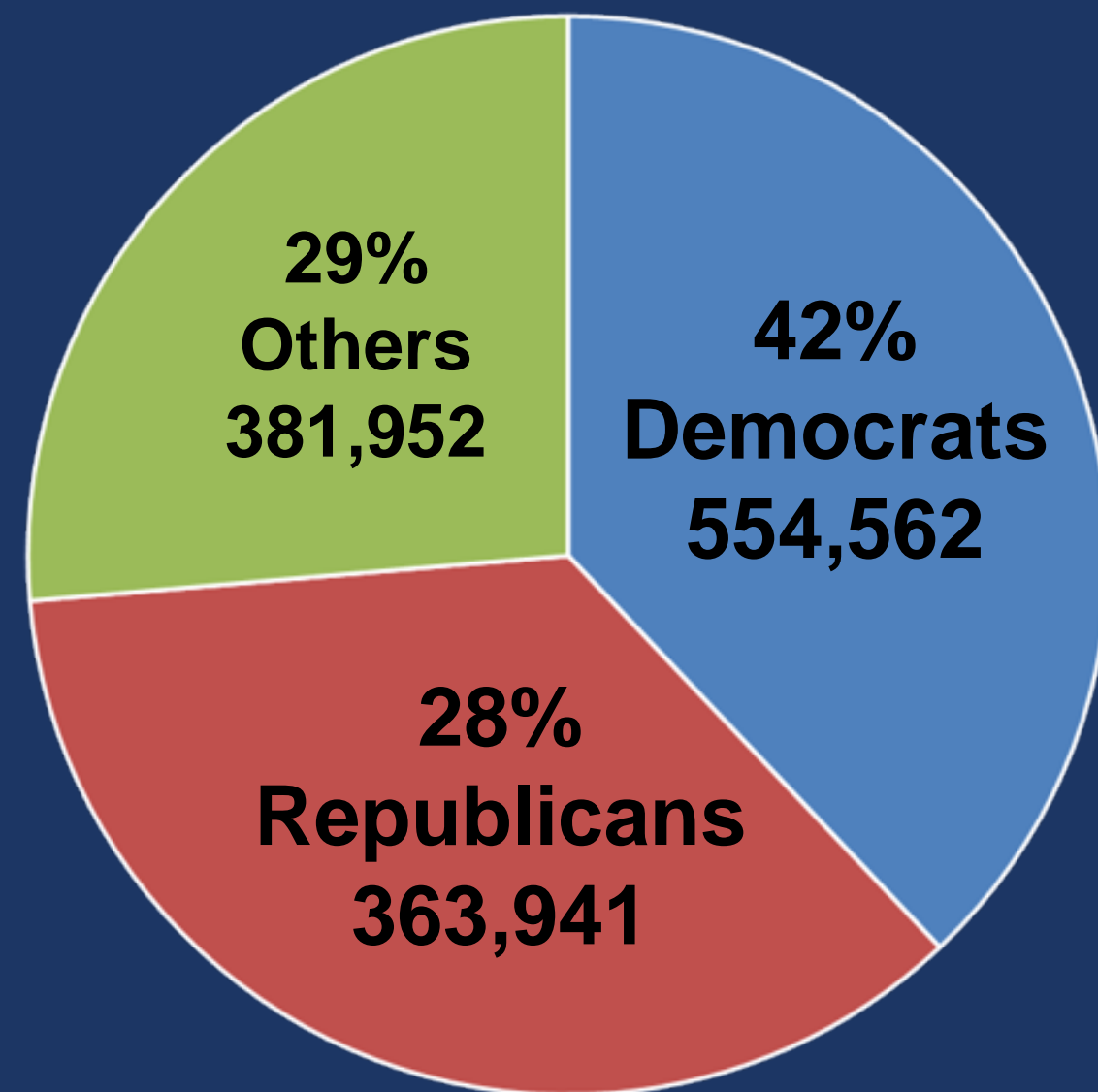
76%



22%

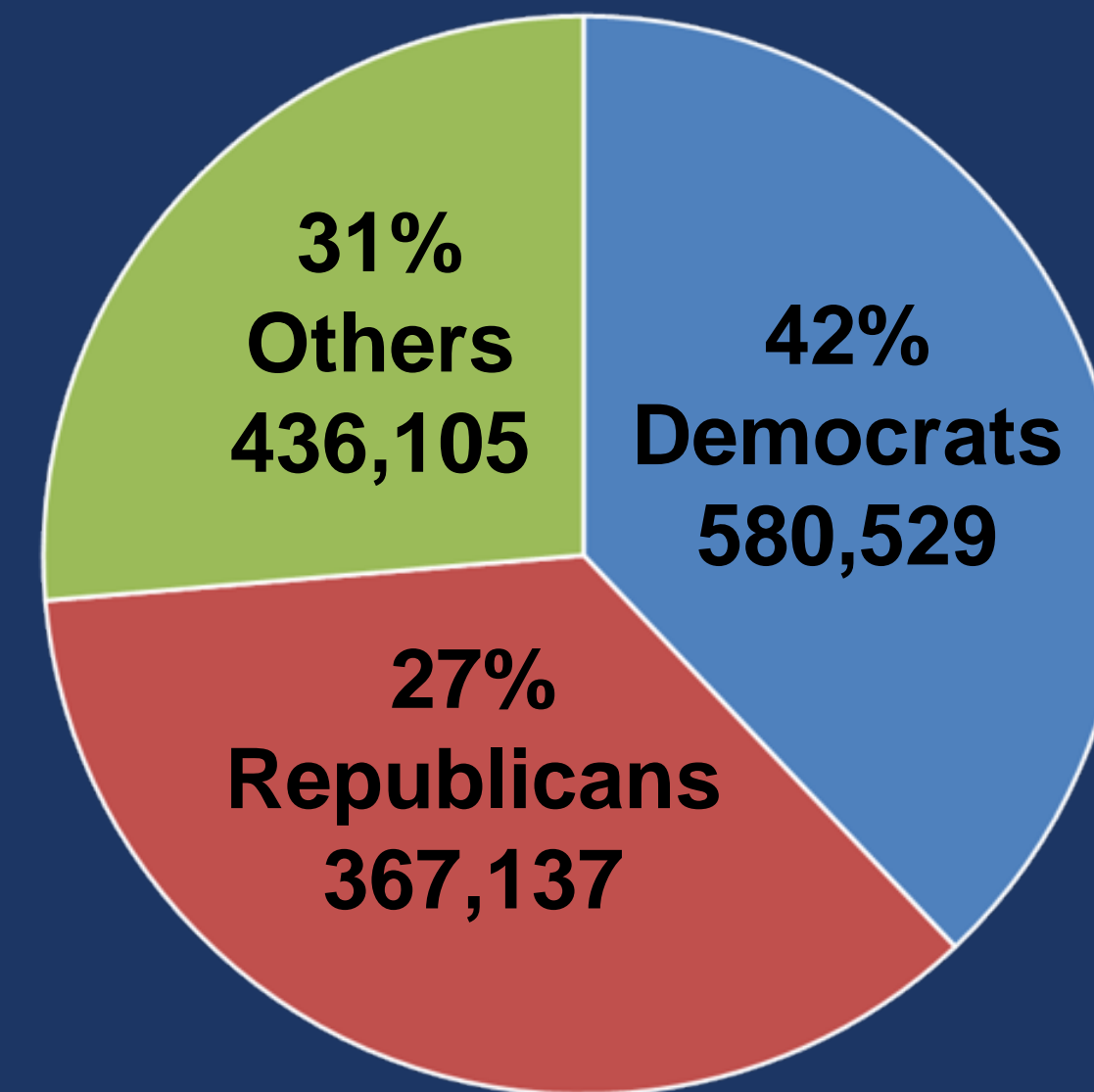
Miami-Dade Voter Registration Politics Are Changing

2014



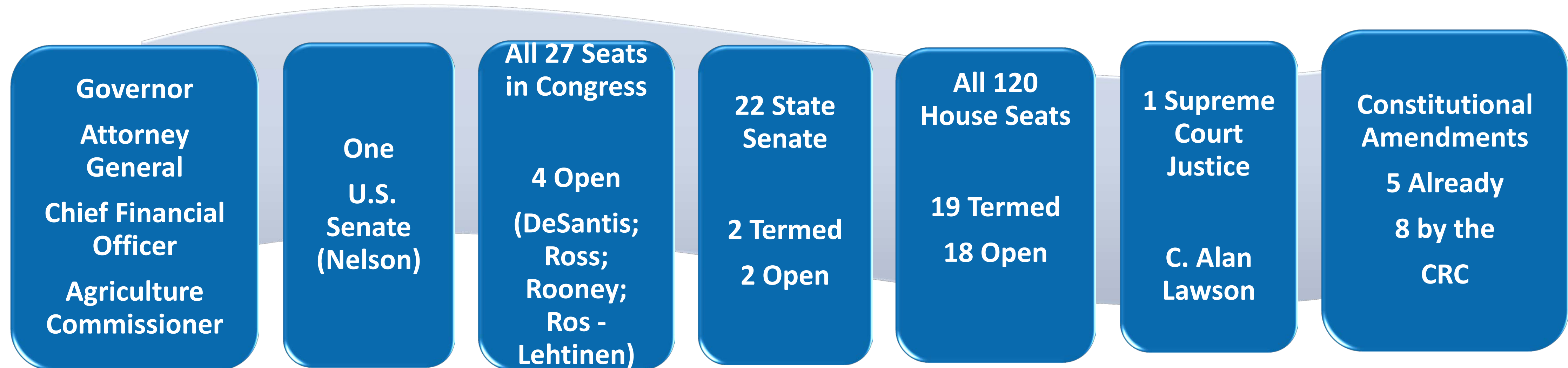
Ds over Rs
190,621
1,300,455

2018

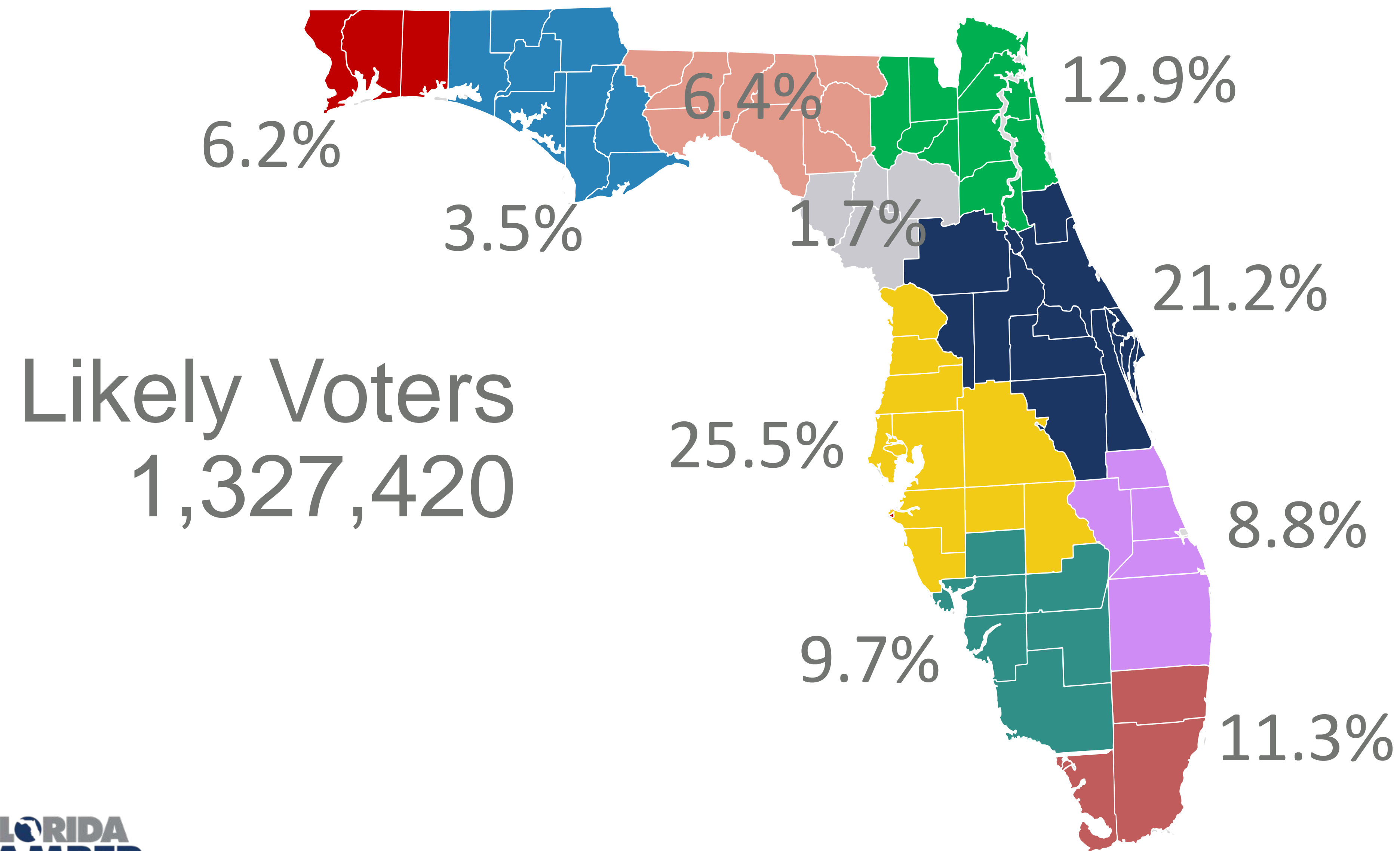


Ds over Rs
213,392
1,383,771

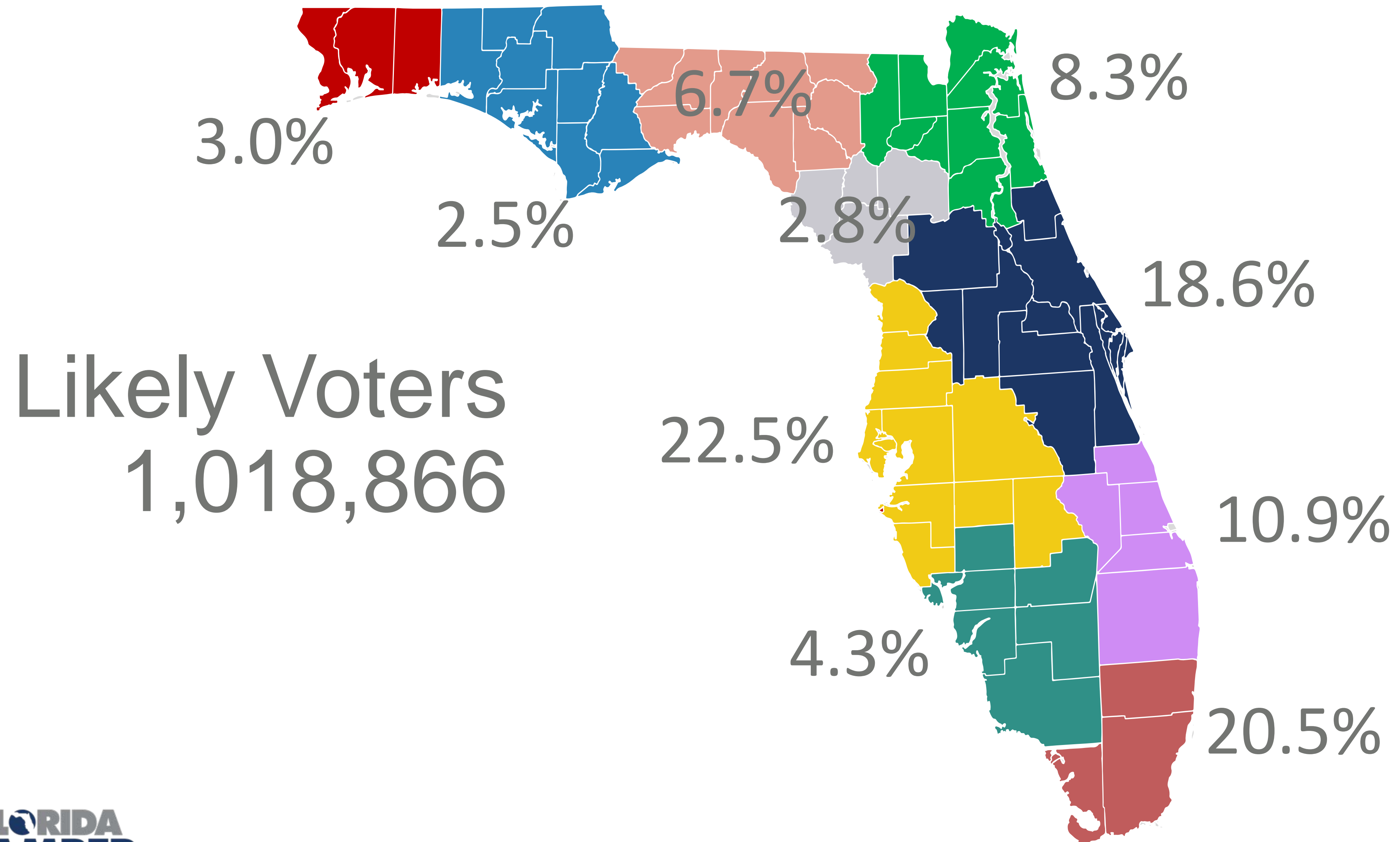
The 2018 Ballot



Republican Primary Vote Share
By DMA



Democrat Primary Vote Share
By DMA



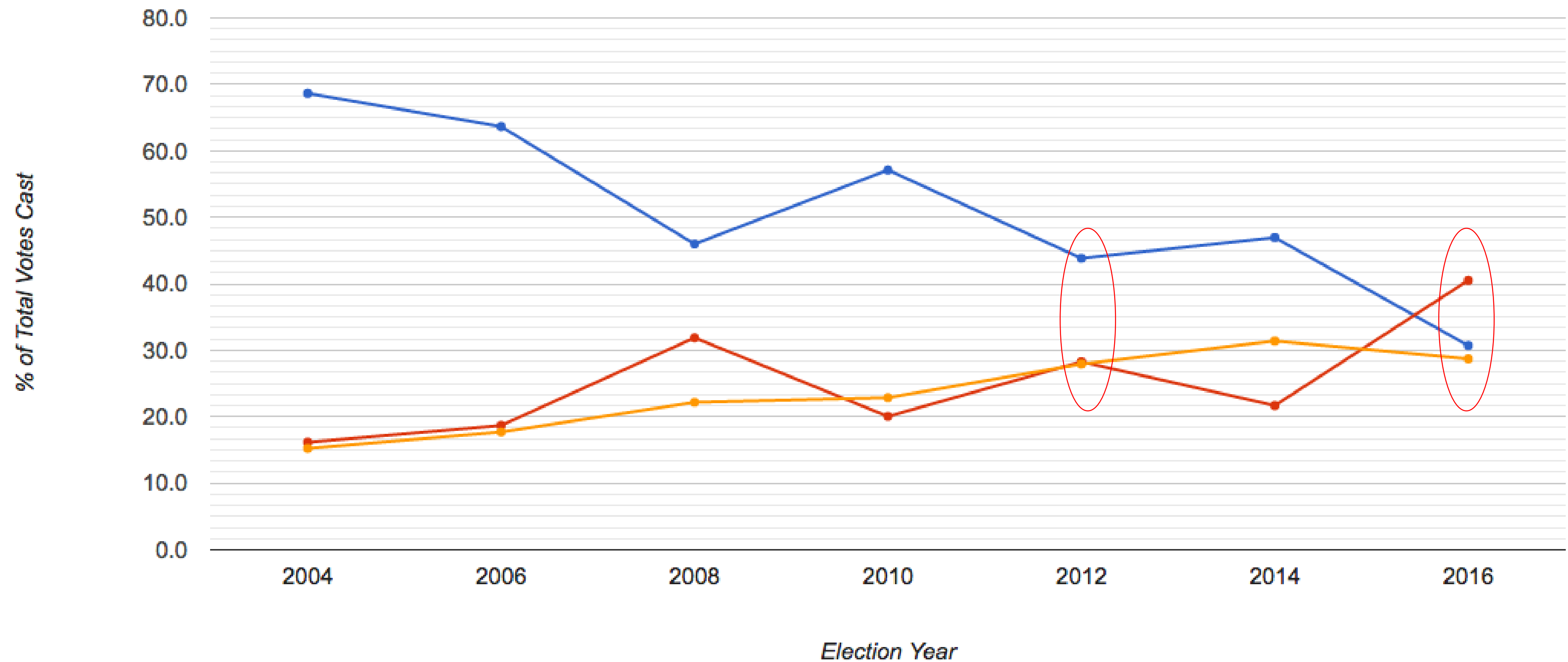
Voting Method Change Over Time

2016

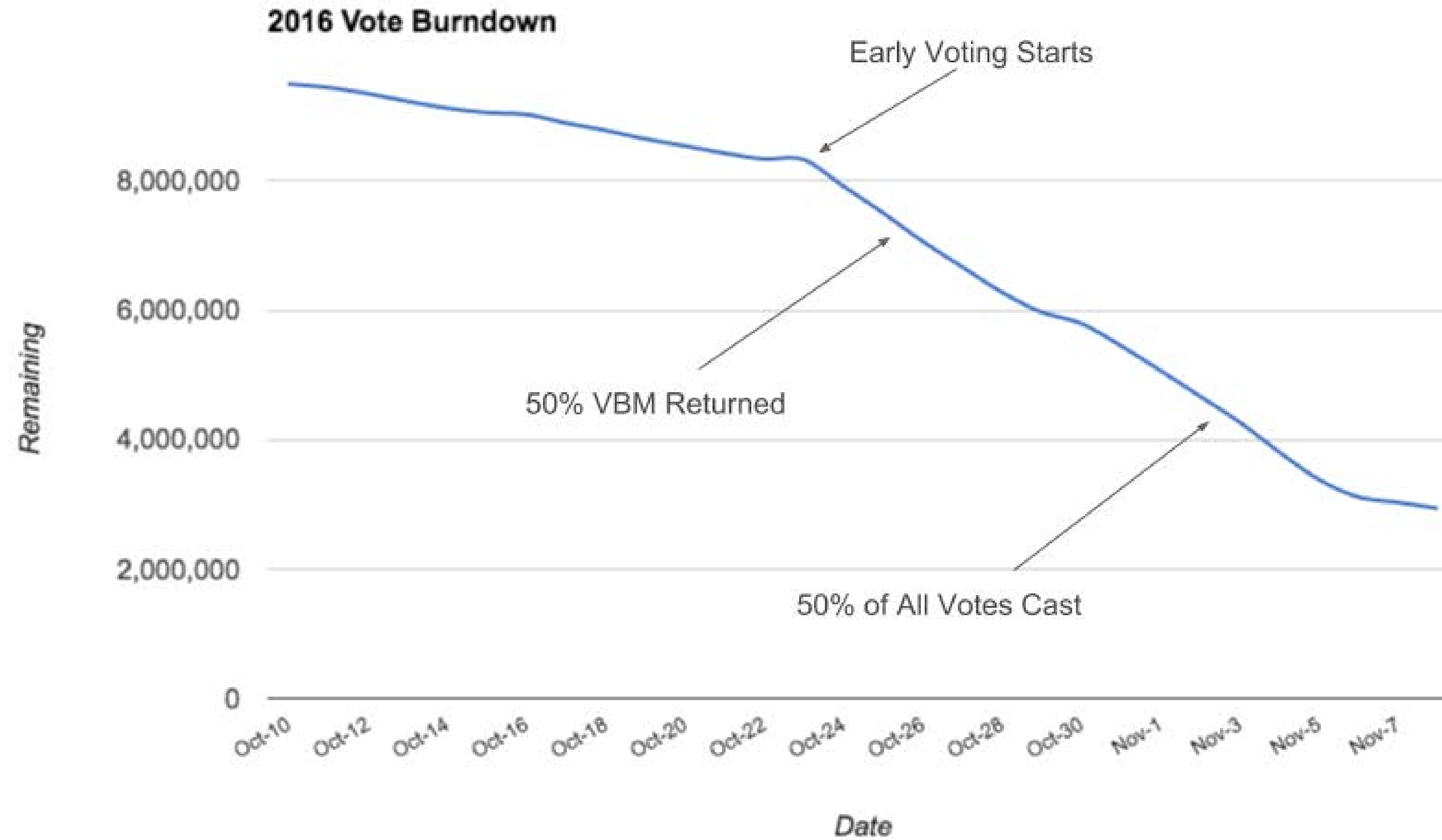
30.7 Election Day
40.5 Early Vote
28.7 Vote by Mail

Vote Share by Ballot Method

— Election Day — Early Vote — Vote by Mail



Voting Method Why It Matters



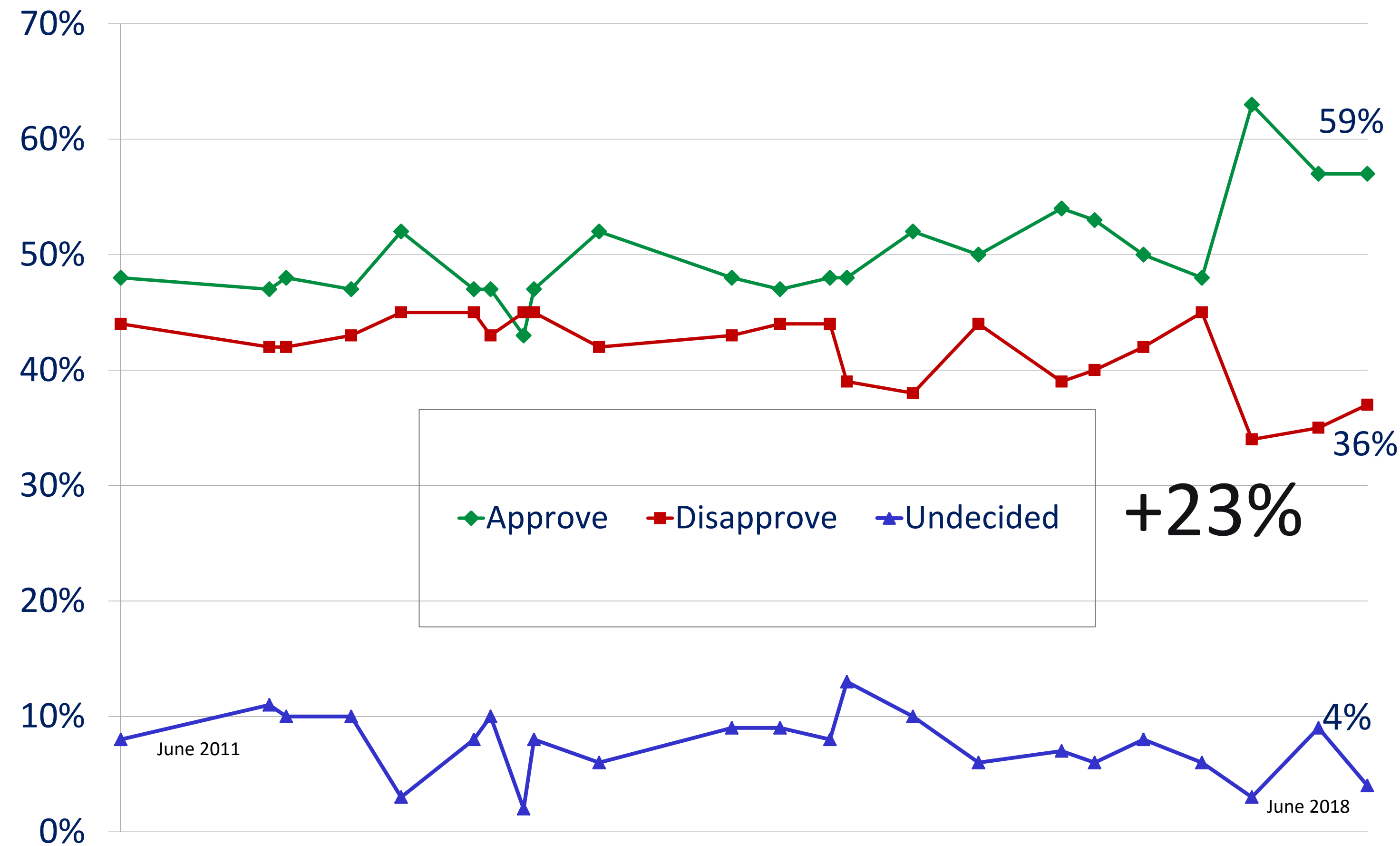


Florida Chamber Poll

Conducted June 2018

N=600

Governor Scott Job Approval



Changing Voter Attitudes

	JOB	EDUCATION	GUNS	OTHER
Statewide	14	13	10	Immigration 8% Healthcare 7% Global Warming 5%
Jacksonville	11	11	13	Immigration 9%
Gainesville	0	29	7	Global Warming 14%
Tallahassee	19	19	13	Global Warming 6%
Panama City/Pensacola	15	10	5	Immigration 7%
Orlando/Daytona	14	11	13	Immigration 6%
Tampa/St. Pete	15	16	6	Healthcare 10%
Ft. Myers/Naples	3	16	5	Property Taxes 11%
Broward/Miami	19	14	10	Global Warming 6%
Palm Beach	9	6	17	Immigration 13%

Right Direction/Wrong Direction

Statewide	52:30	Statewide	52:30
Jacksonville	57:30		
Gainesville	43:29	Men	57:26
Tallahassee	50:25	Women	47:35
Panama City/Pensacola	44:29		
Orlando/Daytona	54:25	Republicans	70:11
Tampa/St. Pete	54:35	Democrats	29:50
Ft. Myers/Naples	68:24	Others	55:27
Broward/Miami	48:36		
Palm Beach	50:27	White	55:27
		Black	34:44
		Hispanic	59:28

Gubernatorial and Cabinet Candidates

Governor	Chief Financial Officer	Attorney General	Agriculture Commissioner
Adam Putnam (R)	Jimmy Patronis (R)	Ashley Moody (R)	Matt Caldwell (R)
Ron DeSantis (R)	Jeremy Ring (D)	Frank White (R)	Denise Grimsley (R)
Andrew Gillum (D)		Sean Shaw (D)	Baxter Troutman (R)
Gwen Graham (D)		Ryan Torrens (D)	David Walker (D)
Chris King (D)			
Philip Levine (D)			
Jeff Greene (D)			

Favorability Ratings – Democratic Candidates

Person/Group	Favorable	Unfavorable	Heard of- Can't Rate	Never Heard of
Bill Nelson	45	34	16	5
Gwen Graham	14	9	19	58
Philip Levine	18	14	20	48
Andrew Gillum	12	7	15	66
Chris King	7	4	13	76

Favorability Ratings – Republican Candidates

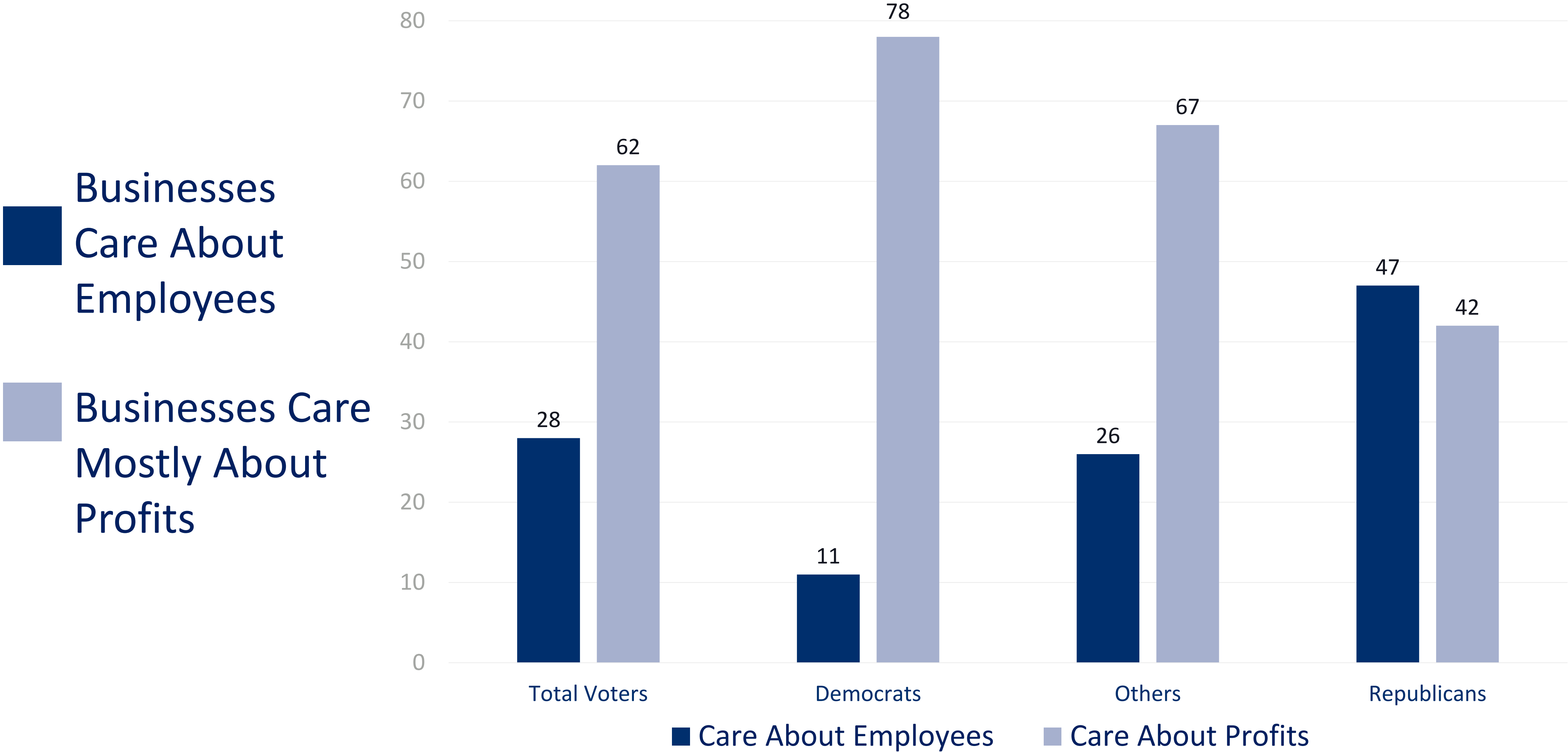
Person/Group	Favorable	Unfavorable	Heard of- Can't Rate	Never Heard of
Rick Scott	51	41	8	0
Adam Putnam	29	15	21	34
Ron DeSantis	18	10	25	47
Jimmy Patronis	10	5	17	68

Job Approval Ratings

Person	Approve	Disapprove	Unsure	
Rick Scott	59	36	4	+23
Donald Trump	49	47	3	+2
Bill Nelson	48	34	18	+14

What Do You Think Motivates Business In This State?

June 2018



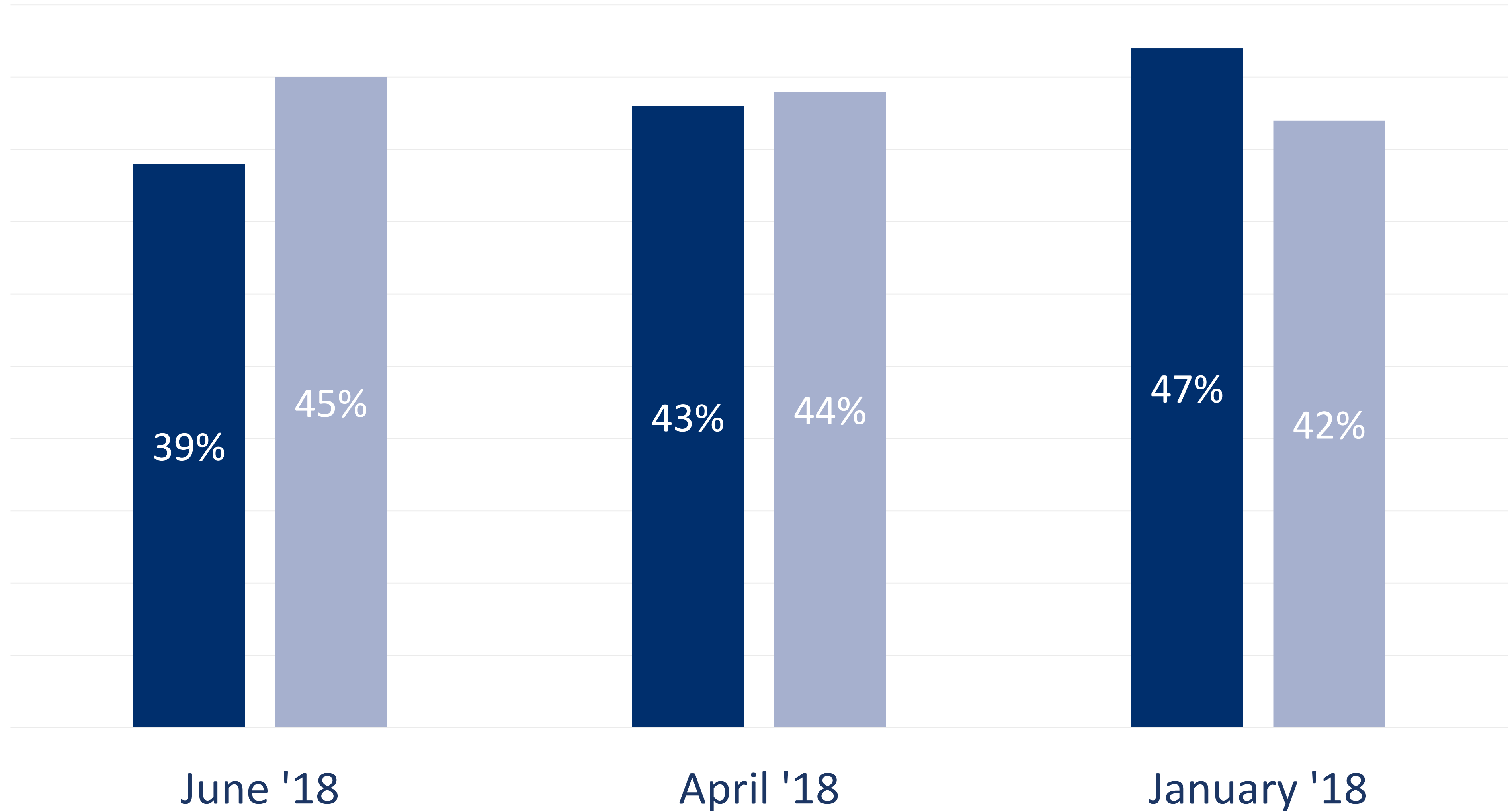
Freedom Preference: January 2018 – June 2018

What's Better? Socialism or Capitalism?

Voters Under 40

■ Socialism
and “About
the Same”

■ Capitalism



QUESTIONS?



Florida Chamber International Trade & Investment Office

CONTACT US

Get in touch

Miami International Trade & Investment Office

Alice Ancona | Director, International Strategy & Policy

Dan Tapia | Manager, International Strategy & Policy



In Person

Office: 201 Alhambra Circle
Coral Gables, FL 33134



Online

www.flchamber.com



By Email

Email: international@flchamber.com



By Phone

(850) 521-1210



International Trade

EXPORTS

IN-TRANSIT

IMPORTS



SERVICES

VISITORS

INVESTMENT



Florida Trade and Logistics Studies

Phase I (2010)

- Document existing and project future trade flows
- Recommend strategies for Florida to compete globally

Phase II (2013)

- Establish the business case for trade
- Identify opportunities and provide recommendations
- Regional implementation and support

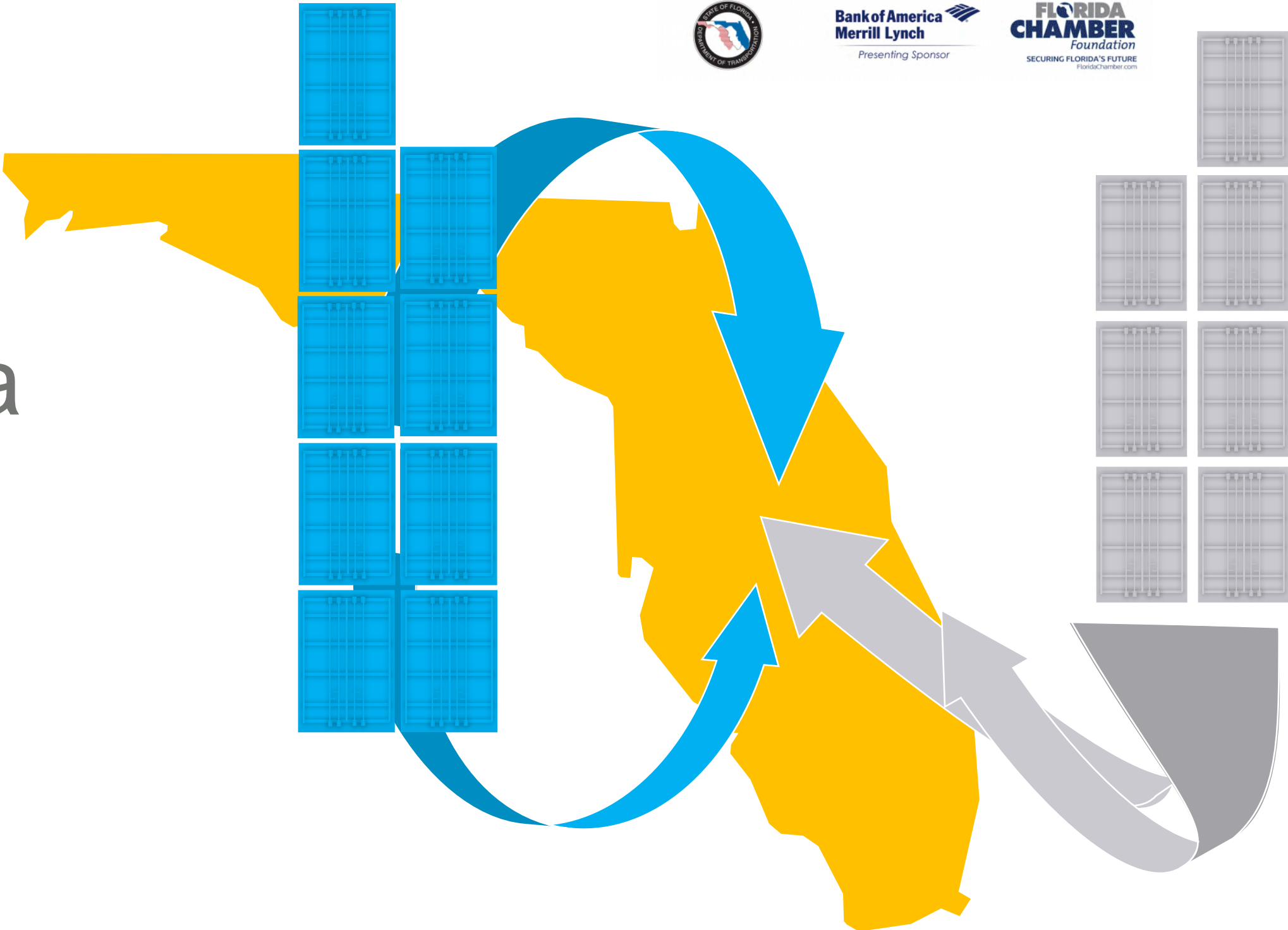
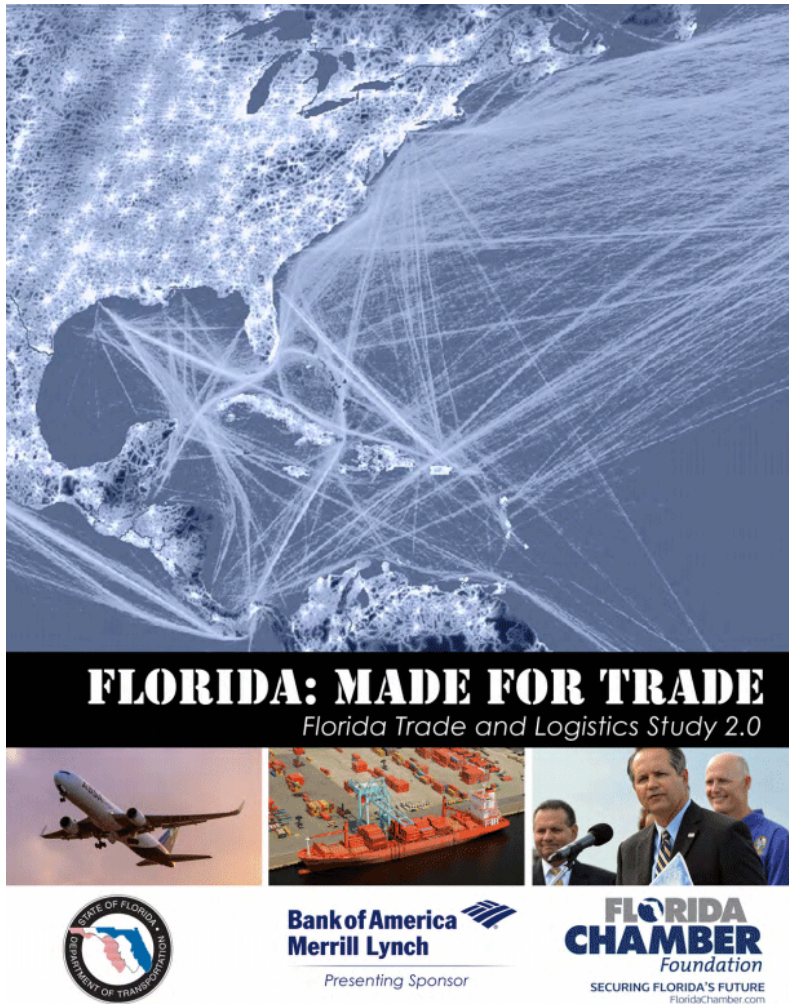


TL 2.0 Goals:

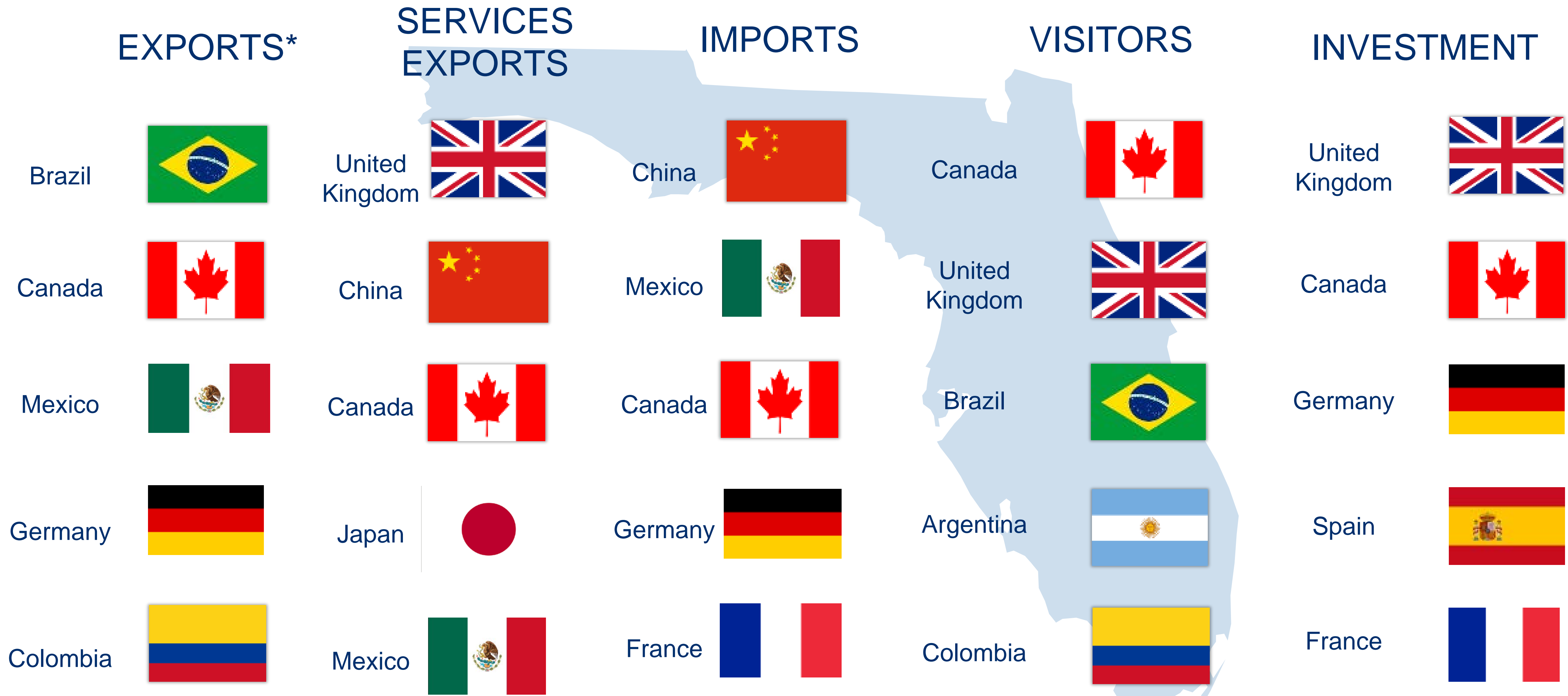
Move more trade through
Florida sea and air gateways

Make, grow, and refine
more products for export in Florida

Multiply the impacts
of trade in Florida



Florida's Top Global Partners



2017 Total *Florida Origin

Source: U.S. Census & The Trade Partnership



INTERNATIONAL TRADE & INVESTMENT OFFICE
Florida Chamber of Commerce



State Export Rankings

All Origin Exports

Origin Exports
(Excluding Petroleum & Gold)

State	Value	State	Value
1.Texas	\$264B	1.Texas	\$186.4B
2.California	\$171.9B	2.California	\$158.7B
3.Washington	\$77B	3.Washington	\$74.5B
4. New York	\$75.2B	4.Illinois	\$60.9B
5.Illinois	\$64.9B	5.Michigan	\$58B
6.Michigan	\$59.7B	6.Florida	\$51.6
7.Louisiana	\$56.4B	7. New York	\$ 48.1
8.Florida	\$55B	8.Louisiana	\$32.9



Miami's Top Global Partners

EXPORTS

Mexico



\$2.06 billion

Chile



\$1.75 billion

Colombia



\$1.64 billion

Brazil



\$1.62 billion

Canada



\$1.38 billion

How does Miami-FLL-Palm Beach MSA
Compare to other states?

Georgia: \$35.6 billion

Miami: \$32.7 billion

Tennessee: \$31.5

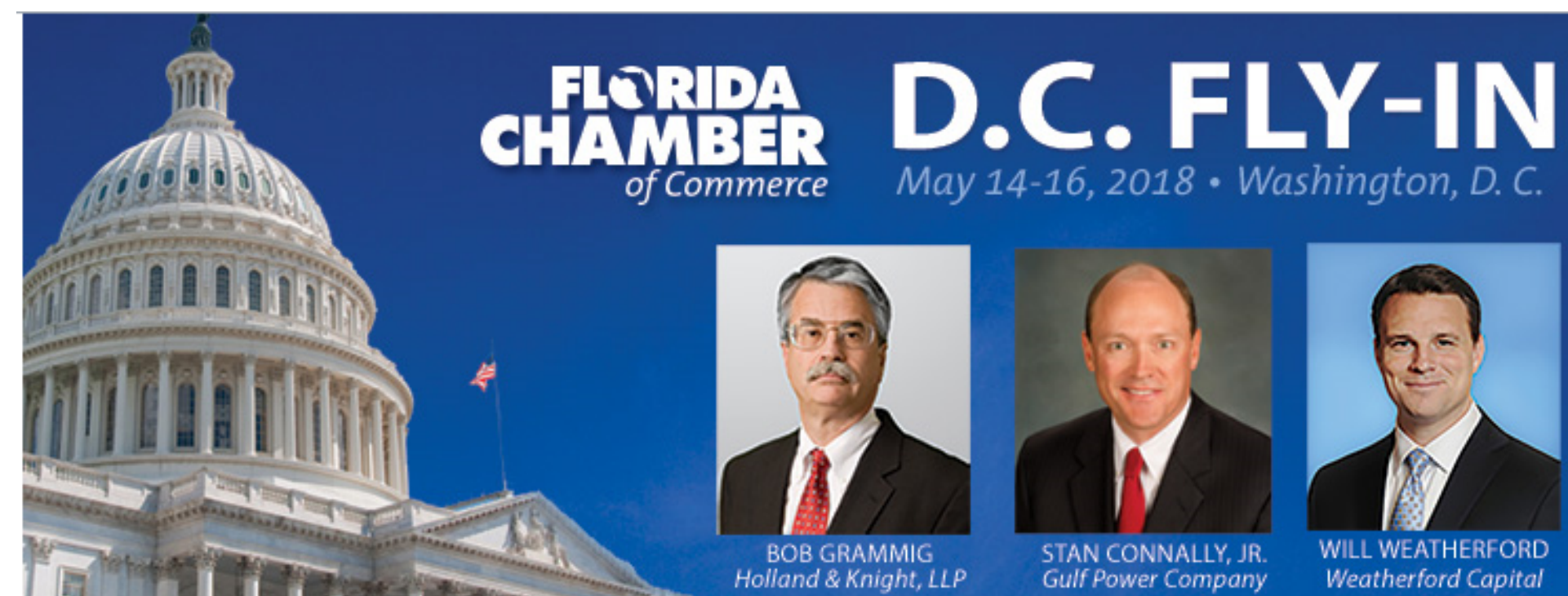
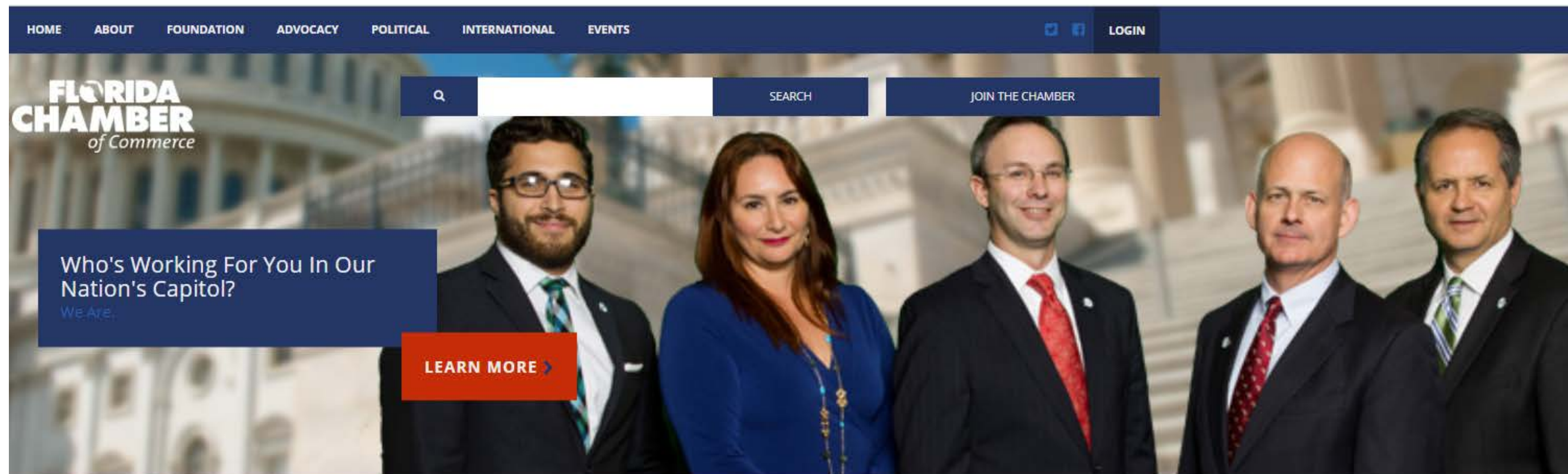
South Carolina: \$31.3 billion

North Carolina: \$30.1 billion

Kentucky: \$29.2 billion

Alabama: \$20.5 billion





Florida Chamber of Commerce Rallies for Job Creators During 2018 D.C. Fly-In

Members of the Florida Chamber of Commerce recently traveled to Washington, D.C. for a three-day "Fly-In" supporting private-sector job creation, regulatory reform, creating opportunities for economic prosperity and emphasizing the importance of trade to job creation in Florida.

Led by Florida Chamber Chair **Bob Grammig**, Partner, Holland & Knight, LLP, **Stan Connally, Jr.**, Chair, Florida Chamber of Commerce Policy Council; Chairman, President & CEO, Gulf Power Company and **Will Weatherford**, Chair, Florida Chamber of Commerce Political Council; Managing Partner, Weatherford Capital, Florida Chamber members participated in an in-depth briefing with Florida's Congressional Delegation, as well as one-on-one meetings with various members of Congress.

In the News

Tampa Bay Times

ADVERTISING

THE BUZZ

Trump's tariffs could spark trade war, Florida Chamber warns

The statewide pro-business group warns of a negative impact on Florida as a global trade hub.

Bloomberg

Business

Trump's Tariff Threats Are Paralyzing American Business

By [Andrew Mayeda](#)

June 15, 2018, 4:00 AM EDT Updated on June 15, 2018, 11:13 AM EDT

...Similar fears loom in Florida, bound to Latin America and the Panama Canal with 14 deep-water sea ports.

The Florida Chamber of Commerce estimates that a quarter of the state's economy depends on trade to some extent.

FLORIDA
CHAMBER
of Commerce

FLORIDA
CHAMBER
of Commerce

136 S. Bronough Street
Tallahassee, FL 32301
Phone: (850) 521-1200
Fax: (850) 521-1203

www.floridachamber.com

September 26, 2017

The Honorable Robert Lighthizer
United States Trade Representative
600 17th Street NW
Washington, DC 20006

RE: Florida Chamber of Commerce Supports Needed Improvements to Modernize NAFTA

Dear Ambassador Lighthizer,

FLORIDA
CHAMBER
of Commerce

CONTACT: Edie Ousley,
850.521.1231 or
eousley@flchamber.com

FOR IMMEDIATE RELEASE

Florida Chamber of Commerce Cautions |
That Trade Tariffs Could Put Florida's Economy At Risk

"Economic momentum gained from Florida's long-term strategic focus on growth and diversification, and the recent tax reforms would be at risk – hurting jobs and consumers." – Alice Ancona, Florida Chamber Director of International Strategy and Policy

The increasing prospect of a trade war could put Florida's economy at risk and negatively impact consumers, families and jobs, the Florida Chamber of Commerce said today.

The Florida Chamber has long-been a leader in promoting fair and equitable market access for Florida-origin exports abroad, and supporting the elimination of barriers that are harmful to Florida's competitiveness as a global hub for trade.

Chamber of Commerce consider the important role which have created an un-

all growing. By 2030, six To prepare for this y opportunities. ur current and future ent.

estic product. Free and fair tion in the global a jobs.

Inbound & Outbound Investment & Trade Missions



Investment and Trade Mission to Ireland and the U.K.

- December 3-7, 2018
- Targeted sectors
- Want to learn more? **Global Florida Webinar, Tuesday July 24th at 10:00 AM**

Florida International Trade and Investment Conference (FITIC)

- April 2019 | Miami, FL
- FITIC will host inbound delegations to showcase Florida and serve as the connector with Florida businesses
- Business matchmaker

QUESTIONS?

CONTACT US

Get in touch

Do politicians understand your business?
Join the Florida Chamber.



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