“Florida is changing. Our economics, our demographics and our politics are all changing and these changes are both opportunities and challenges.” – Mark Wilson
50 Years of Securing Florida’s Future

Florida Leaders Securing Florida’s Future - What Are You Committing To?

1 PLAN
3 GOALS
6 PILLARS
for Florida 2030

1 STEERING COMMITTEE
6 ADVISORY COMMITTEES
155+ PARTNERS & LEADERS
weighing in on Florida’s future

10,000+ FLORIDIANS engaged through
83 TOWN HALLS covering all
67 COUNTIES

For more information:
Tony Carvajal, Tcarvajal@FLFoundation.org
Global Competition (17th to 10th)
---
Path to Prosperity for every zip code in FL
---
Vibrant & Resilient Communities

How do we plan better for the next 5 million Floridians than we did for the last 5 million?

For more information:
Tony Carvajal, Tcarvajal@FLFoundation.org
Growth

Change in Population by Source, 2010-2017 (millions)

Source: U.S. Census Bureau

2016 to 2017 Population Changes

Top Counties:
1. Orange  27,016
2. Miami-Dade  25,376
3. Broward  20,628
4. Hillsborough  20,175
5. Palm Beach  19,951
6. Lee  17,295
7. Osceola  11,092
8. Polk  11,015
9. Duval  10,217
10. Manatee  9,682

Source: U.S. Census Bureau

For more information:
Tony Carvajal, Tcarvajal@FLFoundation.org
2016 to 2017 Population Changes

17 Florida Counties Lost Population

Top 10 States:
Net Moving to Florida

- New York 36,957
- New Jersey 23,567
- Pennsylvania 17,320
- Ohio 14,568
- Connecticut 10,656
- Illinois 10,298
- Virginia 10,046
- Massachusetts 8,587
- Maryland 6,761
- Wisconsin 6,056

Leon County

Gained Wealth From:
- $56.86 million Miami-Dade County, FL
- $44.25 million Broward County, FL
- $24.44 million Palm Beach County, FL
- $15.77 million Alachua County, FL
- $12.16 million Taylor County, FL

Lost Wealth To:
- $448.35 million King County, WA
- $155.18 million Wakulla County, FL
- $67.89 million Orange County, FL
- $64.32 million Hillsborough County, FL
- $61.37 million Duval County, FL

For more information:
Tony Carvajal, Tcarvajal@FLFoundation.org
Florida’s next 5 million People

8 Counties to account for 56.9% of Population Increase:

1. Miami-Dade
2. Orange
3. Hillsborough
4. Broward
5. Palm Beach
6. Lee
7. Duval
8. Osceola

Source: FL Demographic Estimating Conference & BEBR FL Population Studies

www.theFloridaScorecard.org

Downloadable charts
Data is downloadable
Links to data sources
Free to use

For more information:
Tony Carvajal, Tcarvajal@FLFoundation.org
Florida 2030 – Capital Area Rollout
Florida Chamber Foundation

Projected U.S. Population by Generation

Source: Pew Research Center tabulations of U.S. Census Bureau population projections

TV, Mobile phone, PCs, internet, smart devices, augmented & virtual reality

Labor Force by Age*

Source: http://lmsresources.labormarketinfo.com/labor_supply/index.html

*CareerSource Capital Region 5

For more information:
Tony Carvajal, Tcarvajal@FLFoundation.org
% Growth to 2030 by Age Group

% Growth to 2030 by Age Group

+ 2.4 Million Seniors
BUT
3 of 4 still < 65

For more information:
Tony Carvajal, Tcarvajal@FLFoundation.org
New Voters Since 2010

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Statewide</td>
<td>4,574,839</td>
</tr>
<tr>
<td>Men</td>
<td>2,084,543  (46%)</td>
</tr>
<tr>
<td>Women</td>
<td>2,244,901  (49%)</td>
</tr>
<tr>
<td>Republicans</td>
<td>1,297,712  (28%)</td>
</tr>
<tr>
<td>Democrats</td>
<td>1,508,126  (33%)</td>
</tr>
<tr>
<td>NPA/Others</td>
<td>1,769,001  (38%)</td>
</tr>
<tr>
<td>White</td>
<td>2,601,405  (57%)</td>
</tr>
<tr>
<td>Black</td>
<td>567,957   (12%)</td>
</tr>
<tr>
<td>Hispanics</td>
<td>956,304   (21%)</td>
</tr>
</tbody>
</table>

For more information:
Tony Carvajal, Tcarvajal@FLFoundation.org
Innovation

(Year until used by one-quarter of American population)

- Electricity (46 yrs.) 1873
- Telephone (35 yrs.) 1876
- Radio (31 yrs.) 1897
- Television (26 yrs.) 1926
- Personal Computer (16 yrs.) 1975
- Mobile Phone (13 yrs.) 1983
- The Web (7 yrs.) 1991
- Smartphone (5 yrs.) 2005
- Tablet (2 yrs.) 2010

First commercially available year

Nature of Work

U.S. Employment by Job Type

Manager, computer tech, artist, etc.
Office & admin, sales
Construction, manufacturing, production
Food prep., personal care, retail, healthcare support

Source: Federal Reserve Bank of St. Louis analysis of Bureau of Labor Statistics occupational data
Nature of Work

<table>
<thead>
<tr>
<th>Industry</th>
<th>Percent of Jobs Automated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodations &amp; Food Service</td>
<td>80</td>
</tr>
<tr>
<td>Transport &amp; Warehousing</td>
<td>70</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>60</td>
</tr>
<tr>
<td>Health &amp; Medical Services</td>
<td>50</td>
</tr>
<tr>
<td>Education</td>
<td>20</td>
</tr>
</tbody>
</table>


For more information:
Tony Carvajal, Tcarvajal@FLFoundation.org
Florida’s $1 Trillion GDP by Industry – Q1 2018 ($Billion)

<table>
<thead>
<tr>
<th>Industry</th>
<th>GDP ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Real Estate and Rental and Leasing</td>
<td>165.6</td>
</tr>
<tr>
<td>Government (Q3 2017)</td>
<td>112.8</td>
</tr>
<tr>
<td>Health Care &amp; Social Assistance</td>
<td>84.5</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>75.1</td>
</tr>
<tr>
<td>Professional, Scientific, and Technical Services</td>
<td>70.2</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>63.1</td>
</tr>
<tr>
<td>Finance and Insurance</td>
<td>54.3</td>
</tr>
<tr>
<td>Construction</td>
<td>53.8</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>43.2</td>
</tr>
<tr>
<td>Accommodation and Food Services</td>
<td>41.4</td>
</tr>
<tr>
<td>Administrative and Waste Management Services</td>
<td>32.8</td>
</tr>
<tr>
<td>Information</td>
<td>27.3</td>
</tr>
<tr>
<td>Transportation and Warehousing</td>
<td>18.4</td>
</tr>
<tr>
<td>Other Services (except Government)</td>
<td>11.0</td>
</tr>
<tr>
<td>Arts, Entertainment and Recreation</td>
<td>9.1</td>
</tr>
<tr>
<td>Management of Companies and Enterprises</td>
<td>6.3</td>
</tr>
<tr>
<td>Educational Services (Private)</td>
<td>1.6</td>
</tr>
<tr>
<td>Agriculture, Forestry, Fishing and Hunting</td>
<td>1.3</td>
</tr>
</tbody>
</table>

Source: Federal Reserve (FRED) Data, Preliminary estimate using McKinsey Global Institute, Analysis for Jobs in the Americas

For more information:
Tony Carvajal, Tcarvajal@FLFoundation.org
Florida Industry Diversification by MSA

#1 Most Diverse - Palm Bay-Melbourne-Titusville MSA
#2 Most Diverse – Miami-Ft. Lauderdale-West Palm Beach MSA
#3 Most Diverse – Jacksonville MSA
#4 Most Diverse – Orlando-Kissimmee-Sanford MSA
#5 Most Diverse – Naples-Immokalee-Marco Island MSA
#6 Most Diverse – Tampa-St. Petersburg-Clearwater MSA

Global Markets

Projected Gross Domestic Product Growth by Region, 2016-2030

Source: Florida Gulf Coast University, Regional Economic Research Institute


For more information:
Tony Carvajal, Tcarvajal@FLFoundation.org
3B new

Global Markets

- Visitors: 1.6X Larger
- Capital: 2.3X Larger
- Goods: 2.9X Larger
- Services: 3.1X Larger
- Data (05-14): 45X Larger


Source: UN World Tourism Organization, UN Conference on Trade and Development, World Bank, International Monetary Fund, TeleGeography, McKinsey Global Institute, Cambridge Systematics analysis

For more information:
Tony Carvajal, Tcarvajal@FLFoundation.org
Venture Capital Increasing But Needs to Accelerate

- U.S. = $84.7 Billion
- Florida #4 @ $2.34 B
- California equals Florida on January 20th

For more information:
Tony Carvajal, Tcarvajal@FLFoundation.org
Number of Households in Poverty by Zip Code (1,472/983)

“If you eliminated the poverty in just 21 of Florida’s 983 populated zip codes, you would eliminate 10% of all of Florida’s poverty”

Poverty is Concentrated:

<table>
<thead>
<tr>
<th>Households in Poverty</th>
<th>Zip Codes</th>
</tr>
</thead>
<tbody>
<tr>
<td>10%</td>
<td>21</td>
</tr>
<tr>
<td>20%</td>
<td>52</td>
</tr>
<tr>
<td>30%</td>
<td>91</td>
</tr>
<tr>
<td>40%</td>
<td>138</td>
</tr>
<tr>
<td>50%</td>
<td>192</td>
</tr>
</tbody>
</table>

Kids in Poverty in Florida

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

Source Data: American Community Survey, U.S. Census Bureau
Paths To Prosperity and Vibrant & Resilient Communities

ROOT CAUSES
- Jobs
- Education
- Housing
- Transportation
- Health
- Food Security
- Child & Family Care
- Safety
- Justice
- Agency

www.FloridaChamber.com/ProsperityInitiative

For more information:
Tony Carvajal, Tcarvajal@FLFoundation.org
Florida 2030 – Capital Area Rollout
Florida Chamber Foundation

Web of Collisions

Known
Demographics
Politics
Entrepreneurism
Economics
Rule of Law
Automation
Regulations
Globalization
Tribalism
Technology
Free Enterprise
Investments
Nature of Work
Singularity
Talent Needs
Property Rights
Training/Development
Rule of Law
Amenities
Social Compact
Technology
Lifestyle
Regulations
Health Needs
Labor Laws
Lifestyle
Risks
Resources
Property Rights
Where/How Live
Free Enterprise
Entitlements
Transfer of Wealth
Prosperity
Tribalism
Transfer of Wealth

Unknown
BLACK SWANS

For more information:
Tony Carvajal, Tcarvajal@FLFoundation.org
**Summary of Town Hall Findings, Statewide Analysis, 2016-17**

<table>
<thead>
<tr>
<th>Strength</th>
<th>Weakness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Safety</td>
<td>Affordability of Housing</td>
</tr>
<tr>
<td>Transportation</td>
<td>Responsiveness of Govt</td>
</tr>
<tr>
<td>Water Infrastructure</td>
<td>Economic Development</td>
</tr>
<tr>
<td>Arts, Culture, Heritage &amp; Sense of Place</td>
<td>Business Climate- Regulations</td>
</tr>
<tr>
<td>Health &amp; Wellness</td>
<td>Talent</td>
</tr>
<tr>
<td>Economic Prosperity</td>
<td>Improving</td>
</tr>
</tbody>
</table>

*Findings as of 11/2017*
Summary of Town Hall Findings, Where Region Differed

Strength
- Transportation
- Water Infrastructure
- Economic Development
- Talent
- Economic Prosperity

Weakness
- Public Safety
- Arts, Culture, Heritage & Sense of Place
- Health & Wellness
- Business Climate - Regulations
- Responsiveness of Govt

Getting Worse
- Affordability of Housing

Improving

How Your Region Differed – BETTER than State Composite

Strength
- Talent
- Economic Prosperity

Weakness
- Economic Development

Getting Worse

For more information:
Tony Carvajal, Tcarvajal@FLFoundation.org
### How Your Region Differed – WORSE than State Composite

<table>
<thead>
<tr>
<th>Strength</th>
<th>Weakness</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Transportation *</td>
</tr>
<tr>
<td></td>
<td>Economic Prosperity</td>
</tr>
<tr>
<td></td>
<td>Public Safety</td>
</tr>
</tbody>
</table>

**Getting Worse**

- Findings as of 11/2017

**Improving**

- Townhall held 12/15/16

---

1. **Plan 3 Goals 6 Pillars** for Florida 2030
2. **1 Steering Committee**
3. **6 Advisory Committees**
4. **10,000+ Floridians** engaged through 83 Town Halls covering all 67 Counties

**Agility & Resiliency**

1. Become a Talent Magnet
2. Create and Sustain Great Places Across Florida
3. Build a Value-Added Innovation Economy
4. Ensure 21st Century Connectivity
5. Grow Florida’s Role as a Global Hub
6. Collaborate at the Speed of Opportunity

---

For more information:
Tony Carvajal, Tcarvajal@FLFoundation.org
Improving Florida’s Talent Pipeline For A Better Workforce

1.7 million net new jobs needed by 2030 to accommodate growth and maintain unemployment at current levels

(Florida Chamber Foundation 2018 projection)

>80% of Florida’s workforce has essential employability skills

>60% of Floridians 25-64 have a high-value postsecondary certificate, degree, or training experience

95% of entering high school students graduate within 4 years

100% of Florida 8th graders read & perform math at or above grade level

100% of Florida 3rd graders read at or above grade level

100% of children are ready for kindergarten

For more information:
Tony Carvajal, Tcarvajal@FLFoundation.org
Creating Good Jobs by Diversifying Florida’s Economy

TheFloridaScorecard.org

Preparing Florida’s Infrastructure for Smart Growth & Development

TheFloridaScorecard.org

For more information:
Tony Carvajal, Tcarvajal@FLFoundation.org
Building the Perfect Climate For Business

- **CEO Rank**: 2nd (Unchanged)
- **State Legal Climate Ranking**: 46th (Declining)

TheFloridaScorecard.org

Making Government & Civics More Efficient & Effective

- **100% of state agencies** aligned with Florida 2030 goals
- **100% of regional economic development plans** aligned with Florida 2030 goals
- **100% of Florida residents covered by regional visioning processes**
- **Increased** size and impact of nonprofit and philanthropic sectors
- **Doubling** the rate of Floridians who volunteer and participate in civic and public service, moving us from the bottom to the top quartile

For more information:
Tony Carvajal, Tcarvajal@FLFoundation.org
Making Government & Civics More Efficient & Effective

100% of state agencies aligned with Florida 2030 goals
100% of regional economic development plans aligned with Florida 2030 goals
100% of Florida residents covered by regional visioning processes
Increased size and impact of nonprofit and philanthropic sectors
Doubling the rate of Floridians who volunteer and participate in civic and public service, moving us from the bottom to the top quartile

Championing Florida’s Quality of Life & Quality Places

Florida ranks 12th in the nation for overall wellbeing including ranking 1st for social wellbeing & 4th for purpose (The Florida Scorecard.org)

Top 5 state for overall well being
Florida’s brand and reputation as best place to live, work, raise a family, visit, learn, play, relocate, and compete remains top in the nation
<10% of Florida children live in poverty and 100% have a pathway out
<10% of Florida residents live in housing-cost burdened households
Crime rates rank among the lowest 10 states
Florida protects and enhances the value of its arts, culture, heritage, and sense of place

For more information:
Tony Carvajal, Tcarvajal@FLFoundation.org
Championing Florida’s Quality of Life & Quality Places

TheFloridaScorecard.org

Opportunities?

Barriers?

What is Underway?

Top 5 state for overall well being
Florida’s brand and reputation as best place to live, work, raise a family, visit, learn, play, relocate, and compete remains top in the nation
<10% of Florida children live in poverty and 100% have a pathway out
<10% of Florida residents live in housing-cost burdened households
Crime rates rank among the lowest 10 states
Florida protects and enhances the value of its arts, culture, heritage, and sense of place

For more information:
Tony Carvajal, Tcarvajal@FLFoundation.org
“As we move toward 2030, it is now more important than ever for Florida’s leaders in industry, business, nonprofits and government to collaborate, and to work together toward a brighter future.”

Doug Davidson
Market Executive, Bank of America
Chair, Florida Chamber Foundation

www.Florida2030.org
TheFloridaScorecard.org

Mark Your Calendar:
Economic Outlook & Jobs Forecast,
January 14, Orlando

Business Leaders Summit on Prosperity & Economic Opportunity,
May 22-23, West Palm Beach

Learners 2 Earners Summit Workforce Summit with Apprenticeship Focus,
June 18-19, Orlando

For more information:
Tony Carvajal, Tcarvajal@FLFoundation.org