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

Global Competition (17th to 10th)

Path to Prosperity for every zip code in FL (1472)

Vibrant & Sustainable Communities (Local plans)
Drivers of Change

<table>
<thead>
<tr>
<th>HOW WILL FLORIDA WORK IN 2030?</th>
<th>HOW WILL FLORIDA LIVE IN 2030?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global Markets</td>
<td>Growth</td>
</tr>
<tr>
<td>Innovation</td>
<td>Diversity</td>
</tr>
<tr>
<td>Future of Work</td>
<td>Urbanization</td>
</tr>
</tbody>
</table>

Demographics | Politics |
Economics     |         |
Talent Needs  | Where/How Live |
Entitlements   | Transfer of Wealth |

Known

Unknown
Diversity

Projected U.S. Population by Generation

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

Labor Force by Age

Source: http://lmsresources.labormarketinfo.com/labor_supply/index.html
Florida’s next 5.4 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

Top Number: Population Increase
Bottom Number: Percentage Increase

By 2030 NW FL to grow by > 281,000

Source: FL Demographic Estimating Conference & BEBR FL Population Studies
Top 10 States: Net People Moving to Florida

<table>
<thead>
<tr>
<th>State</th>
<th>Net People Moving to Florida</th>
</tr>
</thead>
<tbody>
<tr>
<td>New York</td>
<td>36,957</td>
</tr>
<tr>
<td>New Jersey</td>
<td>23,567</td>
</tr>
<tr>
<td>Pennsylvania</td>
<td>17,320</td>
</tr>
<tr>
<td>Ohio</td>
<td>14,568</td>
</tr>
<tr>
<td>Connecticut</td>
<td>10,656</td>
</tr>
<tr>
<td>Illinois</td>
<td>10,298</td>
</tr>
<tr>
<td>Virginia</td>
<td>10,046</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>8,587</td>
</tr>
<tr>
<td>Maryland</td>
<td>6,761</td>
</tr>
<tr>
<td>Wisconsin</td>
<td>6,056</td>
</tr>
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</table>

Income Migration
Wealth Migration from 1992 - 2015

Florida

- **Gained Wealth From:**
  - $27.89 billion New York
  - $18.29 billion New Jersey
  - $12.89 billion Illinois
  - $10.93 billion Pennsylvania
  - $10.55 billion Connecticut

- **Lost Wealth To:**
  - $1.19 billion North Carolina
  - $1.18 billion Texas
  - $7.48 billion Tennessee
  - $4.26 billion South Carolina
  - $4.21 billion Arizona

- **Gain Wealth:** $879K per year

Escambia

- **Gained Wealth From:**
  - $33.45 million Anne Arundel County, MD
  - $29.96 million Shelby County, TN
  - $29.63 million Montgomery County, MD
  - $27.79 million Fairfax County, VA
  - $26.88 million Mobile County, AL

- **Lost Wealth To:**
  - $31.96 million Santa Rosa County, FL
  - $22.40 million San Diego County, CA
  - $20.72 million Duvall County, FL
  - $20.78 million Baldwin County, AL
  - $20.11 million Virginia Beach City, VA

- **Gain Wealth:** $9.35 million per year

Santa Rosa

- **Gained Wealth From:**
  - $311.86 million Escambia County, FL
  - $184.41 million Okaloosa County, FL
  - $198.22 million Prince William County, VA
  - $198.22 million Shelby County, TN
  - $17.71 million Anne Arundel County, MD

- **Lost Wealth To:**
  - $49.00 million San Diego County, CA
  - $24.00 million Onslow County, NC
  - $19.14 million Lauderdale County, MS
  - $14.94 million Walton County, FL
  - $12.93 million Duvall County, FL

- **Gain Wealth:** $68.89 million per year

See TheFloridaScorecard.org & How Money Walks
www.TheFloridaScorecard.org

Technology

Automation
Nature of Work
Singularity
Investments
Regulations
Talent Needs
Entrepreneurism
Training/Development
Unknown
Where/How Live
Risks

BLACK
SWANS
Nature of Work

Percent of Selected Jobs that Could be Automated Using Existing Technology

Nature of Work

U.S. Employment by Job Type


Global Markets

Projected Gross Domestic Product Growth by Region, 2016-2030

Global Markets


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

Battle Fronts

Known
- Demographics
- Politics
- Economics
- Globalization
- Automation
- Investments
- Talent Needs
- Training/Development
- Resources
- Entitlements
- Where/How Live
- Risks
- Transfer of Wealth
- Prosperity

Unknown
- Entrepreneurism
- Rule of Law
- Regulations
- Technology
- Singularity
- BLACK SWANS
Talent is the key currency of the future. Competition for talent increasing and so is disruption.

“Builders” of Tomorrow

- Cradle to Career, Learners to Earners
  Ready to Learn
  3rd Grade Reading
  Ready to Earn with pathways & critical skills

- Prepare for retraining, rigors & rate of change

Continue to Diversify & Drive to New Economy

“Signals” to Capital, Job Creators & Talent

- Retain, Recruit, Grow and Cluster
- Leverage Strengths & Invest in New Ones
- Make, Move & Multiply Impacts
- Research, Develop, Commercialize
- Collaborate @ Speed of Opportunity
Position for Growth & Opportunities
Best Place to Live, Work, Learn, Play and Compete

- Emphasize “Connectivity”
- Sustain and Grow our Supporting Systems
- Resiliency

Responsiveness & Competitiveness
Predictability & Reliability
Global Signals

- Tax & Regulatory Costs
- Property Rights
- Managing Risks
- Legal Climate
Systems, Structures & Institutions that **Support—not impede**—Free Enterprise & Action

- **Align** Government Systems
- **Simplify** & **Delay**
- **Leveraging** Voters, Volunteers & Philanthropy

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**Paths to Prosperity** for Every Floridian
Healthy, Safe, Sustainable Quality of Life

- Sense of Place & Security
- Address Generational Poverty
- Arts, Culture, Heritage
- Focus on **Florida Brand**
Summary of Town Hall Findings, Statewide Analysis, 2016-17

**Strength**
- Public Safety
- Transportation
- Water Infrastructure
- Economic Development

**Weakness**
- Arts, Culture, Heritage & Sense of Place
- Health & Wellness
- Talent
- Business Climate- Regulations
- Responsiveness of Govt
- Economic Prosperity
- Affordability of Housing

*Findings as of 11/2017"
Summary of Town Hall Findings, Regional Differences (10.11.16)

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[www.northwestfloridaforward.com](http://www.northwestfloridaforward.com)