“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?

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?
### Improving Florida’s talent pipeline for a better workforce
- 80% of Florida’s workforce has essential employability skills
- 60% of Floridians 25-64 have a high-value postsecondary certificate, degree, or training experience
- 99% of graduating high school students graduate within 4 years
- 100% of third graders read & perform math at or above grade level
- 100% of second graders read at or above grade level
- 100% of children are ready for kindergarten

### Creating good jobs by diversifying Florida’s economy
- Top state for gross domestic product and top quartile most diversified state economy
- #1 state for overseas visitors
- #1 state for business exports
- Top 5 states for manufacturing jobs
- Top 3 states for technology jobs
- #1 state for business startups
- Top 3 state for venture capital investments
- Top 3 state for research and development funding and patents issued
- Rural county share of Florida gross domestic product doubles

### Preparing Florida’s infrastructure for smart growth and development
- Diverse, attainable housing to meet future demand
- Every resident has access to public and private mobility services
- All major population and economic centers connected to regional, national, and global markets by high-capacity corridors
- World’s most capable spaceport, top-tier airports, seaports, and surface transportation hubs
- 100% of Florida residents have access to high-speed communications connectivity
- Diverse and reliable energy, water, and waste management resources to meet future demand
- All Florida residents protected by resiliency plans

### Building the perfect climate for business
- Actively sound property insurance rates based on actual risk and competition
- #1 business tax climate in the nation
- Regulatory, labor, and operating risk environments rated among top 3 in the nation
- Environmental permitting and novel land use ancillary issues rated among top quartile in the nation
- Occupational licensing laws rated among top 3 in the nation
- Legal climate improves to top quartile in the nation

### Making government and citizens more efficient and 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 planning processes
- Increased size and impact of nonprofit and philanthropic sectors
- Doubling the rate of Floridians who volunteer and participate in civic and public service, rising up from the bottom to the top quartile

### Championing Florida’s quality of life
- Top 5 state for overall well-being
- Florida brand and reputation as best place to live, work, raise a family, visit, learn, play, relocate, and compete remains top in the nation
- 80% of Florida children live in poverty
- 100% have a pathway out
- < 10% of Florida residents live in housing with hazardous levels of lead
- Crime rates rank among the lowest 10 states
- Floridians perceive and enhance the value of arts, culture, heritage, and sense of place

---

**Help secure Florida’s future at** [Florida2030.org](http://Florida2030.org)

**Track Florida’s progress at** [TheFloridaScorecard.org](http://TheFloridaScorecard.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
2016 to 2017 Population Changes

17 Florida Counties
Lost Population

Source: U.S. Census Bureau

Top 10 States: Net People 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
Job Creation

November 2017 to November 2018

Florida Job Creation Rate: 2.8%
U.S. Job Creation Rate: 1.7%

Top Counties for Jobs:
Orange  32,713
Broward   20,185
Palm Beach  19,655

Top Growth Rate Counties:
Seminole, Orange, Lake, Osceola – all 4.6%

5 Florida Counties Lost Jobs over past year

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
Risk & Resiliency

Category 3+ Hurricanes Near Florida, 1854-2017

Declared US. Disasters by Year

Source: National Oceanic and Atmospheric Administration, Federal Emergency Management Administration (three-year rolling average)
www.theFloridaScorecard.org

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

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

Projected U.S. Population by Generation

≈Today

Millennial
20-39

Gen X
40-54

Boomer
55-69

Silent
70+
<table>
<thead>
<tr>
<th>Age Group</th>
<th>Labor Force</th>
<th>% Growth to 2030</th>
</tr>
</thead>
<tbody>
<tr>
<td>16 to 19 Years</td>
<td>5,673</td>
<td>74%</td>
</tr>
<tr>
<td>20 and 21 Years</td>
<td>11,913</td>
<td>65%</td>
</tr>
<tr>
<td>22 to 24 Years</td>
<td>12,655</td>
<td>59%</td>
</tr>
<tr>
<td>25 to 29 Years</td>
<td>17,956</td>
<td>55%</td>
</tr>
<tr>
<td>30 to 34 Years</td>
<td>14,784</td>
<td>50%</td>
</tr>
<tr>
<td>35 to 44 Years</td>
<td>24,047</td>
<td>49%</td>
</tr>
<tr>
<td>45 to 54 Years</td>
<td>24,584</td>
<td>45%</td>
</tr>
<tr>
<td>55 to 59 Years</td>
<td>24,584</td>
<td>40%</td>
</tr>
<tr>
<td>60 and 61 Years</td>
<td>11,185</td>
<td>35%</td>
</tr>
<tr>
<td>62 to 64 Years</td>
<td>4,579</td>
<td>34%</td>
</tr>
<tr>
<td>70 to 74 Years</td>
<td>1,386</td>
<td>30%</td>
</tr>
<tr>
<td>75 years and over</td>
<td>757</td>
<td>25%</td>
</tr>
</tbody>
</table>
+ 2.4 Million Seniors
BUT
3 of 4 still < 65
Innovation

Technology Fueled Disruption Ahead

Globalization
Automation
Technology

Known
Investments
Talent Needs
Training/Development
Resources

Free Enterprise
Regulations
Entrepreneurism
Economics
Rule of Law
Property Rights

Unknown
SINGULARITY
BLACK SWANS

Nature of Work
Social Compact
Labor Laws
Entitlements

Where/How Live
Risks

Source: Singularity.com
Nature of Work

U.S. Employment by Job Type

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

Nature of Work

Percent of Selected Jobs that Could be Automated Using Existing Technology

Florida’s $1 Trillion GDP by Industry – Q1 2018 ($Billion)

- Real Estate and Rental and Leasing: $165.6 billion
- Government (Q3 2017): $112.8 billion
- Health Care & Social Assistance: $84.5 billion
- Retail Trade: $75.1 billion
- Professional, Scientific, and Technical Services: $70.2 billion
- Wholesale Trade: $63.1 billion
- Finance and Insurance: $54.3 billion
- Construction: $53.8 billion
- Manufacturing: $43.2 billion
- Accommodation and Food Services: $41.4 billion
- Information: $32.8 billion
- Transportation and Warehousing: $27.3 billion
- Other Services (except Government): $18.4 billion
- Arts, Entertainment and Recreation: $14.3 billion
- Management of Companies and Enterprises: $9.1 billion
- Educational Services (Private): $6.3 billion
- Agriculture, Forestry, Fishing and Hunting: $1.6 billion

Source: Federal Reserve (FRED) Data

Technical Potential for DISRUPTION
- Predictable Physical Work
- Data Processing
- Data Collection
- Stakeholder Interactions
- Managing Others
- Non-Place Based Analysis/Transactions

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

Source: Florida Gulf Coast University, Regional Economic Research Institute
Top Inflow Counties
- Marion
- Duval
- Columbia
- Levy
- Clay
- Gilchrist

Top Outflow Counties
- Duval
- Marion
- Orange
- Hillsborough
- Leon
- Columbia

Labor Inflow/Outflow Alachua

Global Markets

Projected Gross Domestic Product Growth by Region, 2016-2030

Source: FL Dept of Economic Opportunity Labor Shed Analysis, US Census Bureau

Global Markets

3B new
Job Wars
Global 500


Source: UN World Tourism Organization, UN Conference on Trade and Development, World Bank, International Monetary Fund, TeleGeography, McKinsey Global Institute, Cambridge Systematics analysis
Venture Capital Increasing But Needs to Accelerate

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

www.FloridaChamber.com/ProsperityReport

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
#IsFLReady
#FL2030
Summary of Town Hall Findings, Statewide Analysis, 2016-17

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

Summary of Town Hall Findings, Where Region Differed

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<tr>
<td>Affordability of Housing</td>
<td></td>
</tr>
</tbody>
</table>

*Findings as of 11/2017

Getting Worse | Improving

Florida Chamber Foundation

*Findings as of 11/2017
How Gainesville Differed – BETTER than State Composite

Strength

Weakness

Public Safety
Health & Wellness
Water Infrastructure
Economic Development
Economic Prosperity

Getting Worse

Improving

*Findings as of 11/2017
Town hall 4.4.2017

How Gainesville Differed – WORSE than State Composite

Strength

Weakness

Responsiveness of Govt
Transportation
Business Climate- Regulations
Affordability of Housing
Economic Prosperity

Getting Worse

Improving

*Findings as of 11/2017
Coordinates
Help secure Florida’s future at Florida2030.org

Track Florida’s progress at TheFloridaScorecard.org

Improving Florida’s talent pipeline for a better workforce

- Early Learning
- K-12
- Higher Education
- Workforce Training

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

Talent is the key currency of the future
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

Improving Florida’s Talent Pipeline For A Better Workforce

3rd Grade Scores

57%

Reading (Declining)

TheFloridaScorecard.org

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Creating Good Jobs by Diversifying Florida’s Economy

- Florida’s Economic Portfolio
- Innovation Economy
- Entrepreneurism
- Capital & Investments
- Global Trade

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

Creating Good Jobs by Diversifying Florida’s Economy

TheFloridaScorecard.org
Position for Growth & Opportunities
Best Place to Live, Work, Learn, Raise Family, Play, and Compete

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

Preparing Florida’s Infrastructure for Smart Growth and Development

- Planning, Development & Housing
- Transportation and Logistics
- Energy
- Communications
- Water
- Waste Management
- Environmental Issues
- Risk Preparedness & Mitigation

Preparing Florida’s Infrastructure for Smart Growth & Development

TheFloridaScorecard.org
Building the Perfect Climate for Business

- Taxes
- Regulation
- Legal Reform
- Permitting
- Property Rights
- Workplace & Employment Issues
- Insurance

Building the Perfect Climate For Business

• Taxes
• Regulation
• Legal Reform
• Permitting
• Property Rights
• Workplace & Employment Issues
• Insurance

TheFloridaScorecard.org
Making Government and Civics More Efficient and Effective

- Florida’s Budget
- Government Systems
- Federal Issues
- Local Government Issues
- Regional Stewardship
- Public/Private Partnerships
- Ethics & Elections
- Florida’s Constitution
- Civic Infrastructure

Making Government & Civics More Efficient & Effective

- Align Government Systems
- Simplify & Delayer
- Leveraging Voters, Volunteers, & Philanthropy

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
Making Government & Civics More Efficient & Effective

TheFloridaScorecard.org

Championing Florida’s Quality of Life

- Health & Wellness
- Retirement & Lifelong Engagement
- Safety & Security
- Housing & Livability
- Families & Children
- Retirement & Lifelong Engagement
- Economic Opportunity & Prosperity
- Sense of Place & Community
- Opposing Gambling Expansion
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 (Gallup-ShareCare Wellbeing Index, 2017)

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

Championing Florida’s Quality of Life & Quality Places

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TheFloridaScorecard.org
Opportunities?

Barriers?

What is Underway?

Help secure Florida’s future at Florida2030.org

Track Florida’s progress at TheFloridaScorecard.org
Securing Florida’s Future…Together

www.Florida2030.org
TheFloridaScorecard.org

Mark Your Calendar:

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

Environmental Permitting Summer School,
July 16-18, Marco Island

www.FloridaChamber.com/Events